First American Title™

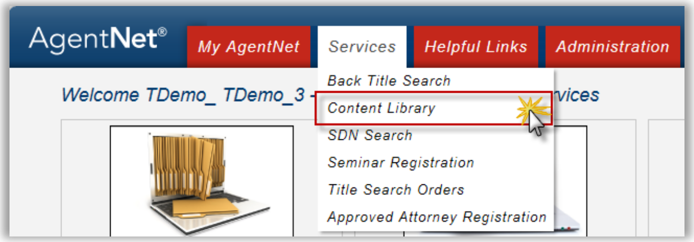
AgentNet® User Manual

Table of Contents

Content Library

Access Content Library

Scroll over the **Services** Tab and select **Content Library**.



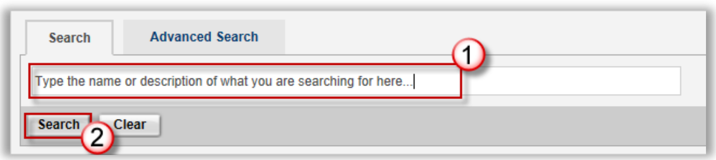
Search for Content

Follow the steps below to locate items or materials in the Content Library in AgentNet.

Search tab

1. Type the name or description of an item you are looking for in the provided field
2. Click **Search**

   NOTE: To clear your search entries and start over, click **Clear**



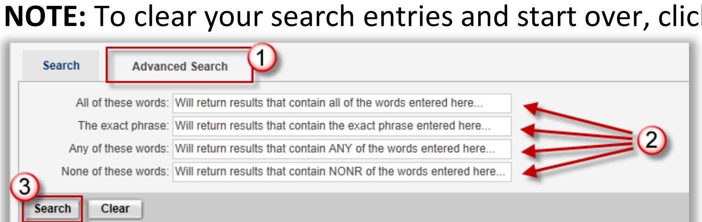
Advanced Search tab

If you are having trouble locating something, the advanced search will provide enhanced search options to better assist you. Follow the steps below to perform an advanced search.

1. Click the **Advanced Search** tab
2. Type your search query in any or all of the fields provided:
   a. **All of these words**: Returns results that contain all of the words entered
   b. **The exact phrase**: Returns results that contain the exact phrase entered
   c. **Any of these words**: Returns results that contain ANY of the words entered
   d. **None of these words**: Return results that contain NONE of the words entered

      NOTE: You may type search information into any combination of fields provided. You are not restricted from searching in any field versus another.
3. Click **Search**

   NOTE: To clear your search entries and start over, click **Clear**

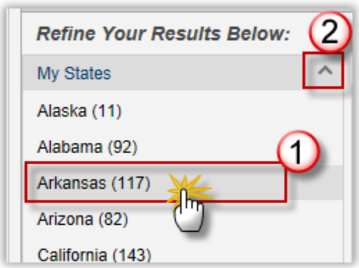


Refine Search

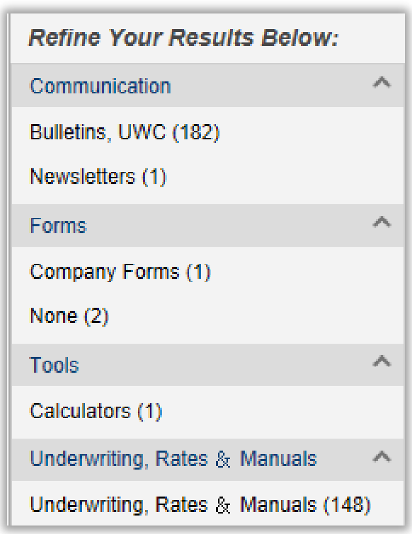
After performing a search, you can further refine your results returned to better locate the item you are searching for. Follow the steps below to refine your search.

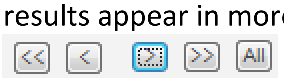
1. Immediately after a search, your first options are to filter by business unit. Select the business unit in which your document is located
   a. **My States** – Represents the states your agency does business
   b. **Other States** – Represents states your agency does not do business
   c. **Global** – Business units that represent the entire US
   d. **Effective Date** – Date the document was posted to Content Library

2. You can collapse the Business unit options for better viewing by clicking 

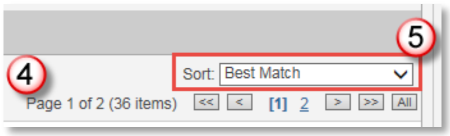


3. After selecting a Business Unit, you can further refine your results by selecting from a category
   a. Communication
   b. Forms
   c. Tools
   d. Underwriting, Rates & Manuals

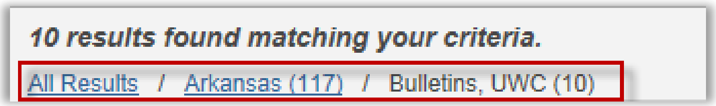


4. If your results appear in more than one page, you may navigate by selecting a page number or by clicking one of 

5. Sort your results by selecting from the drop down menu
   NOTE: The default sort option for Content Library is "Best Match"



6. If you choose to go back to previous results before refining, click the appropriate hyperlink at the top of your results



National Agents

As a national agent, please be sure to select the "National Agency" refiner under the "Global" options. This will help you locate documents distributed by National Agency Division. Information under the individual state refiners is also helpful but it may pertain to our local agents and some of the information (such as contact information, remittance information, etc.) may not be applicable to you as a national agent. Your representative with the National Agency Division or NADadmin@firstam.com should always be your primary point of contact. Please contact us if you have any questions regarding information you find under the individual state refiners.

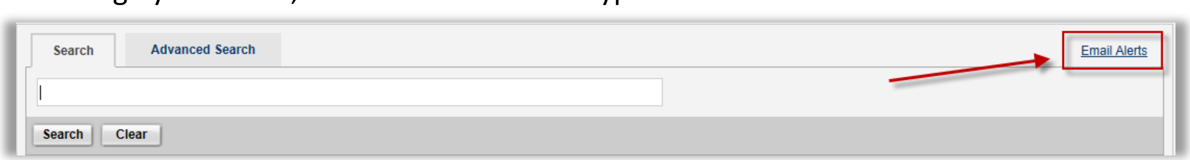
Search Tips

The following search tips may better assist you in locating items in the Content Library.

- Searching in the Content Library is now similar to a "Google" search, so your search should focus on the subject, rather than where the item is located   Be specific in your search, if you know what you are looking for
- Documents that are selected more often will be shown at the top of search results.
- Spelling and grammar may impact your returned results. If you're having trouble locating a document, consider searching in various ways (e.g. Mechanics', Mechanic's, Mechanics, Mechanic)
- For the most effective search,
  - 1. Enter the name of the document or subject
  - 2. Refine search by state or category
- Click the **Clear** button start a new search.

Manage Alerts

You can designate that you be alerted regarding changes to specific documentation or categories in the content Library. Follow the steps below to set or edit alerts.
To manage your alerts, click the Email Alerts hyperlink.



NOTE: A window opens displaying current alerts.

Add Alert

From the existing alerts page

1. Click **Add New Alert**

2. Select your Level One Group
   a. Any of My State(s)
   b. Any State
   c. AgentNet Release Notes
   d. AgentNet Software Integration
   e. Eagle Academy
   f. Home Office National Bulletins
   g. National Agency

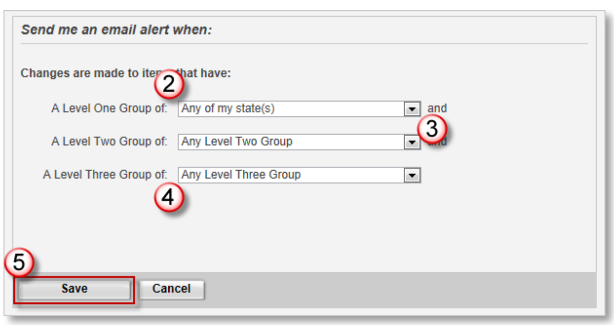
3. Select your Level Two Group

   NOTE: Level Two groups will consist of available categories that fall under your level one group such as "Communication" or "Forms".

4. Select your Level Three Group

   NOTE: Level Three groups will consist of available sub-categories that fall under your level two group.

5. Click **Save**



Delete Alert

From the existing alerts page

1. Check the ☐ next to each alert you wish to remove
2. Click **Delete Selected Alerts**
3. Click **Done**

Document Alerts

From your search results

1. Click to the right of the document you wish to receive alerts on

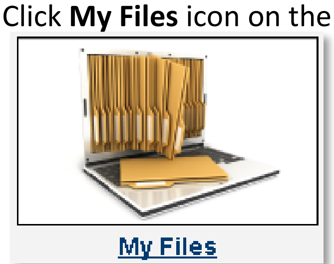
   NOTE: Documents with an already have an alert set.

2. Select the appropriate scenarios for how you wish to be alerted
3. Click **Save**

Create New File

__NOTE:__ You must create a file to order a service.

1. Click **My Files** icon on the AgentNet home page



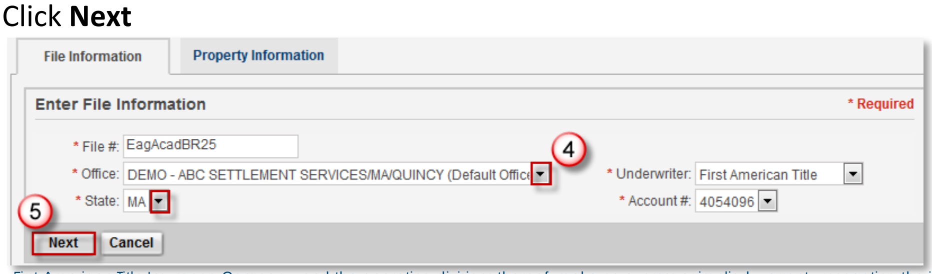
2. Click Create New File hyperlink or click By Services tab and File Information [Create New] hyperlink
3. Enter the **File #**

   __NOTE:__ If AgentNet detects that the new file or file number is potentially a duplicate proceed to **Duplicate Files**

4. Select appropriate **Office** and **State** from the dropdown menu

   __NOTE:__ The Office and State info listed in the dropdown menu correlates to what was selected in **My View** (refer to job aid entitled **My View** in User Guides tab). It is important the Office and State are correct as changes cannot be made once the file is created.

5. Click **Next**



Use Address to Create File

There are two options to complete the creation of a file in the Property Information. Use ◉ Enter Address if you will be using an address or ◉ Enter APN if you will be creating the file with an APN.

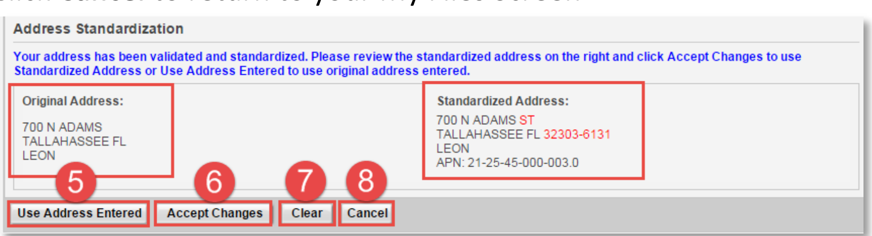
1. Click the radio button for ◉ Enter Address
2. Select the appropriate **Property Type** from the dropdown menu on the **Property Information** tab

   NOTE: Residential means real property having a house, individual condominium unit, mobile home permanently affixed to real estate or other dwelling unit intended principally for the occupancy of from one to four (1-4) families.

3. Enter any property information you have in the appropriate fields
4. Click **Next**

   NOTE: The Address Standardization will appear on the **Property Information** tab

5. Click **Use Address Entered** to use the Original Address entered
6. Click **Accept Changes** to use the Standardized Address
7. Click **Clear** to erase the information selected for Property Type, Address, City, Zip and County on your **Property Information** tab above and allow you to re-enter the information, see above steps 1 through 4
8. Click **Cancel** to return to your My Files Screen



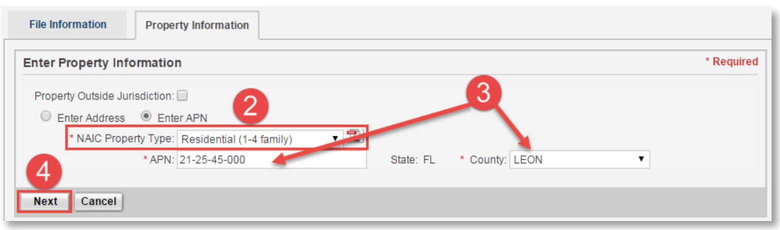
Use APN to Create File

1. Click the radio button for Enter APN
2. Select the appropriate **Property Type** from the dropdown menu on the **Property Information** tab

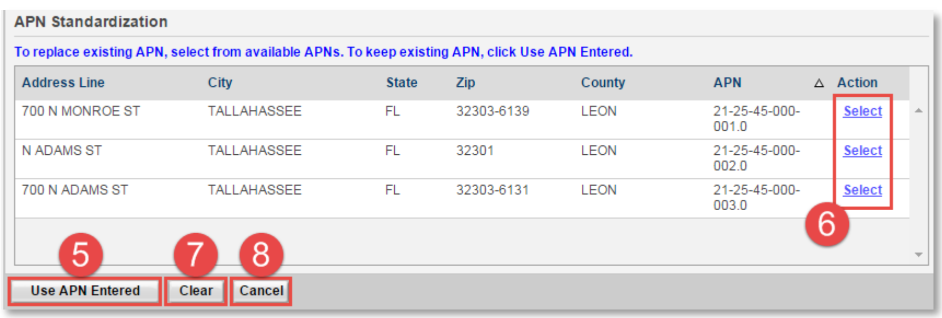
   NOTE: Residential means real property having a house, individual condominium unit, mobile home permanently affixed to real estate or other dwelling unit intended principally for the occupancy of from one to four (1-4) families.

3. Enter any property information you have in the appropriate fields
4. Click **Next**

   NOTE: The APN Standardization will appear on the **Property Information** tab



5. Click **Use APN Entered** to use the Original APN entered
6. Click Select on the correct APN associated with the property
7. Click **Clear** to erase the information selected for Property Type, APN and County on your **Property Information** tab above and allow you to re-enter the information, see above steps 1 through 4
8. Click **Cancel** to return to your My Files Screen


APN Standardization

To replace existing APN, select from available APNs. To keep existing APN, click Use APN Entered.

Address Line	City	State	Zip	County	APN	Action
700 N MONROE ST	TALLAHASSEE	FL	32303-6139	LEON	21-25-45-000-001.0	Select
N ADAMS ST	TALLAHASSEE	FL	32301	LEON	21-25-45-000-002.0	Select
700 N ADAMS ST	TALLAHASSEE	FL	32303-6131	LEON	21-25-45-000-003.0	Select

Use APN Entered · Clear · Cancel

Duplicate Files

The following are steps to take if AgentNet detects a potential duplicate file being generated.

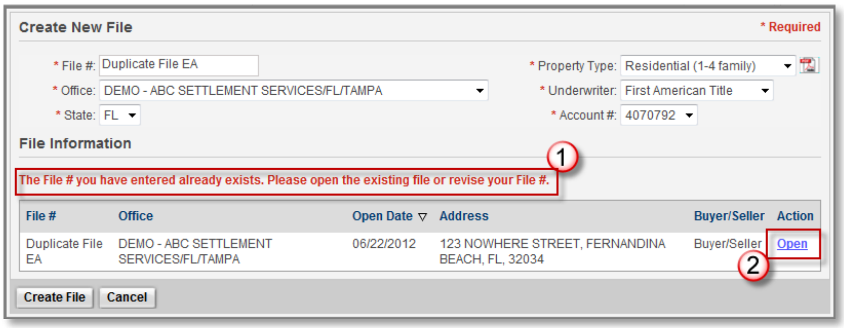
Duplicate file in same office

If your new file is a duplicate of an existing file in your same office:

1. You are notified that file already exists

   NOTE: You must work in that existing file or change your file number.

2. Click the **Open** hyperlink to continue working in that file



3. Proceed to **File Management** section of this job aid

Duplicate file in different office (same Firm)

If your new file is a duplicate of an existing file in a separate office but within your same firm:

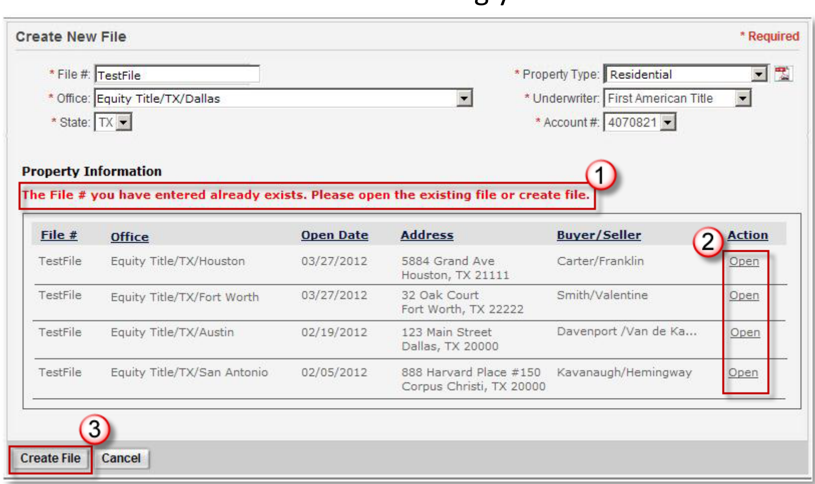
1. You are notified of the potential duplicate files

   NOTE: You have the option to use one of the other potential duplicates or continue creating your file.

2. Click the **Open** hyperlink next to the potential duplicate you wish to work in

Or…

3. Click Create File to continue creating your file

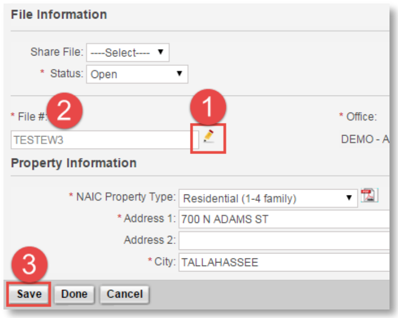


4. Proceed to **File Management** section of this job aid

File Management

Edit File Number

1. Select
2. Edit **File #**
3. Click **Save**



Edit Office, Underwriter and/or Account

1. Click next to **Office**

   NOTE: A new window will open.

2. Select the new **Office**, **Underwriter** and/or **Account #**
3. Click **Done**

File Summary Screen

1. Click File Summary on File Services page or on My Files page to access print/preview screen
2. Click icon to print or icon to save to your computer

Change File Status

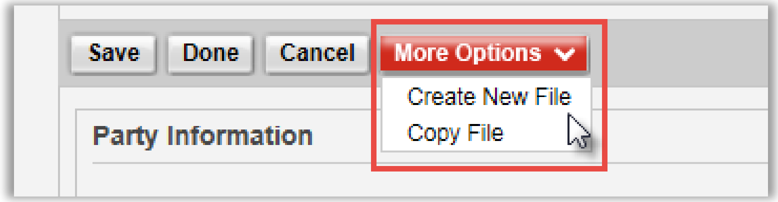
1. Open Status dropdown menu
2. Select * Status: Cancelled

   NOTE: Can select from “Open”, “Opened in Error” or “Cancelled” in dropdown menu.

3. Click Save

More Options

Using the **More Options** button, you can quickly create a new file without having to navigate back to the **My Files** page and you can also copy an existing file. Simply select the appropriate option from the dropdown menu.

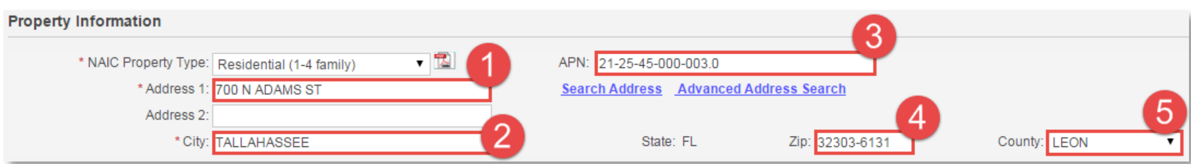


Manage Property Information

You can make changes to the property address or APN after initially creating your file at any time by doing the following:

1. Enter data in field for **Address 1**
2. Enter **City**
3. Enter **APN**
4. Enter **Zip**
5. Select **County** from dropdown menu

   NOTE: It is acceptable to enter or change any combination of these fields as needed



6. Proceed to **Search Address** or **Advanced Address Search** below or to continue without validating the address
7. Click Save

Search Address

1. Click Search Address to determine if any Property Location Information is available
   a. When similar addresses are available:
      i. To replace existing address, click Select from available addresses
      ii. To keep existing address, click Save Existing

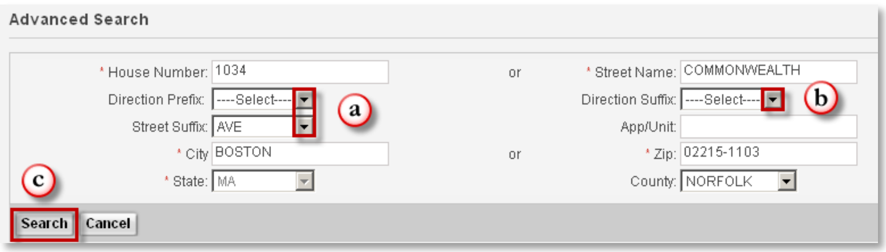
   b. If your search returned no results, you will receive a message in red that indicates such

   Your search returned no results. Use Advanced Search or click on Save to keep existing address.

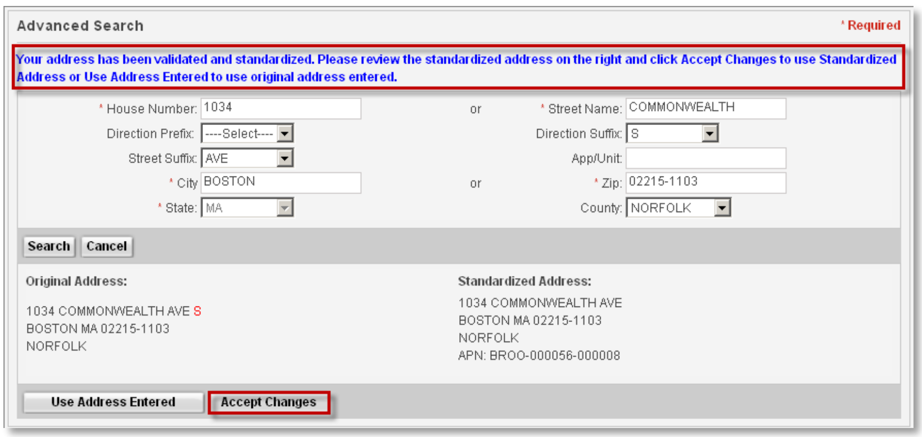
      i. Attempt an Advanced Address Search OR
      ii. Click Save to keep existing address without populating file information

Advanced Address Search

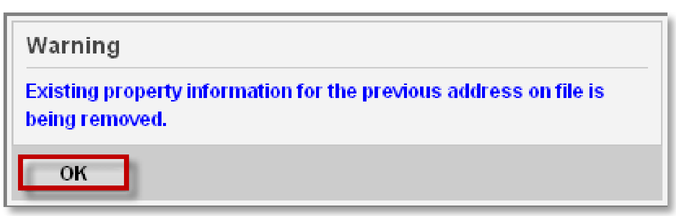
1. Click Advanced Address Search to determine if any property location information is available for this address
   a. Select applicable Direction Prefix or Street Suffix for house number from dropdown menu and/or
   b. Select applicable Direction Suffix for street name from dropdown menu
   c. Click **Search**



2. A message will appear with the original address and standardized adddress. Click **Accept Changes** to use the standardized address



3. Click Use Address Entered to use the original address
4. Click **OK**



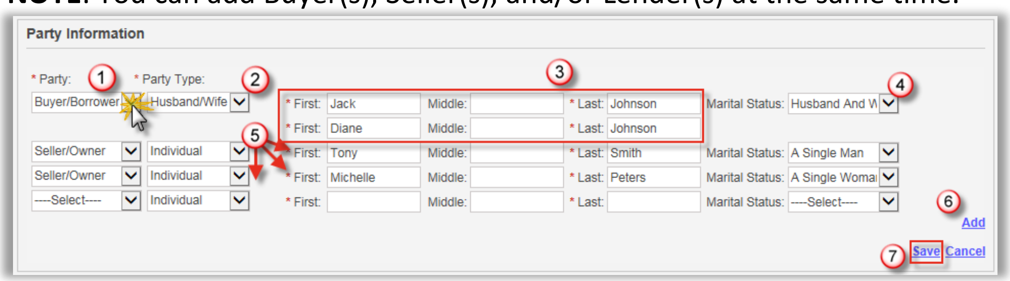
Enter Buyer/Seller Names

1. Navigate to Party Information heading and select the **Party** from dropdown menu:
   a. **Buyer/Borrower** – Continue to step 2
   b. **Lender** – Proceed to **Enter Lender Information**
   c. **Seller/Owner** – Continue to step 2

2. Select the **Party Type** from dropdown menu
   a. **Entity** – Field with 250 character limit to enter name of entity
   b. **Husband/Wife** – Enter both the names of the Husband and Wife
   c. **Individual** – Enter the first and last name of the individual
   d. **Trust/Estate** - Field with 250 character limit to enter name of Trust/Estate

3. Fill in the fields with the appropriate party names
4. For **Husband/Wife** or **Individual**, select the appropriate **Marital Status** in the dropdown menu
5. Repeat these steps for additional parties
6. Click Add if you need additional party entry rows
   NOTE: You may add up to 7 additional entry rows. A maximum of (4) **Buyers**, (4) **Sellers** and (4) **Lenders** may be added to a file.

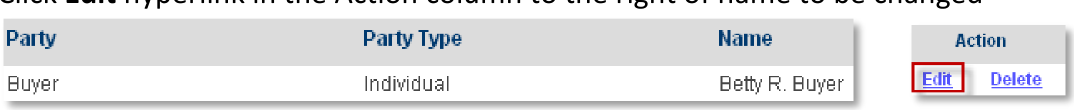
7. Click Save to add all parties to the file
   NOTE: You can add Buyer(s), Seller(s), and/or Lender(s) at the same time.



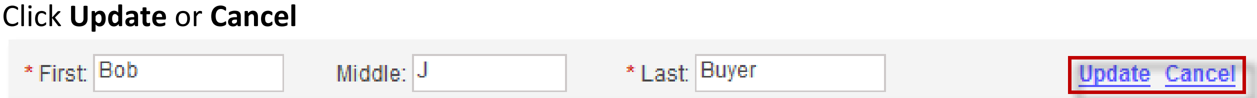
Revisions

Edit

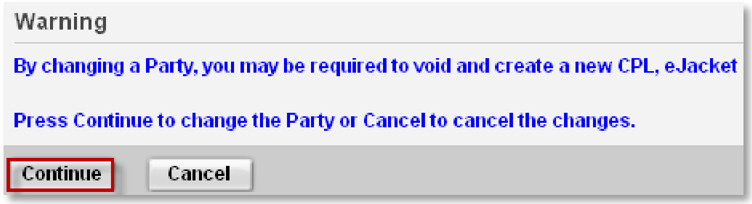
1. Click **Edit** hyperlink in the Action column to the right of name to be changed



2. Make needed change(s)
3. Click **Update** or **Cancel**



NOTE: You might receive this message if you have a CPL or eJacket created. You should consider updating or generating a new service as applicable and sending to affected parties. Click **Continue**.

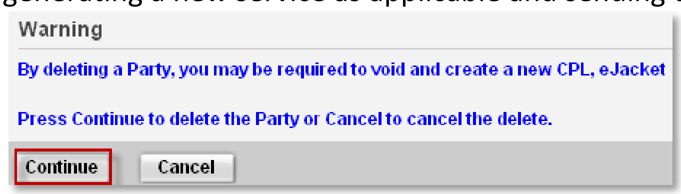


Delete

1. Click **Delete** hyperlink in the Action column to the right of to be deleted

Party	Party Type	Name	Actions
Buyer/Borrower	Individual	Bob J Buyer	Edit Delete
Buyer/Borrower	Entity	ABC, LLC	Edit Delete

2. You might receive this message if you have a CPL or eJacket created. You should consider updating or generating a new service as applicable and sending to affected parties. Click **Continue.**



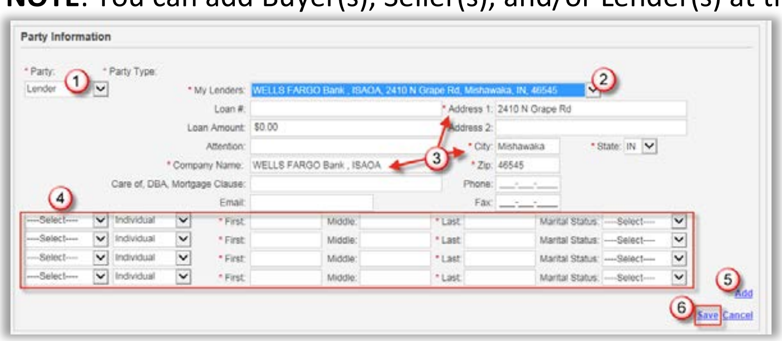
Enter Lender Information

1. Navigate to **Party Information** heading and select the **Party** (Lender) from dropdown menu.
2. Select the **Lender** from dropdown menu **My Lenders**
3. Enter any required (*) Lender information (Company Name/Address/City/State/Zip) in addition to any other available information such as Loan # or email if available
4. Repeat these steps for additional parties
5. Click Add if you need additional party entry rows

   NOTE: You may add up to 7 additional entry rows. A maximum of (4) **Buyers**, (4) **Sellers** and (4) **Lenders** may be added to a file.

6. Click Save to add all parties to the file

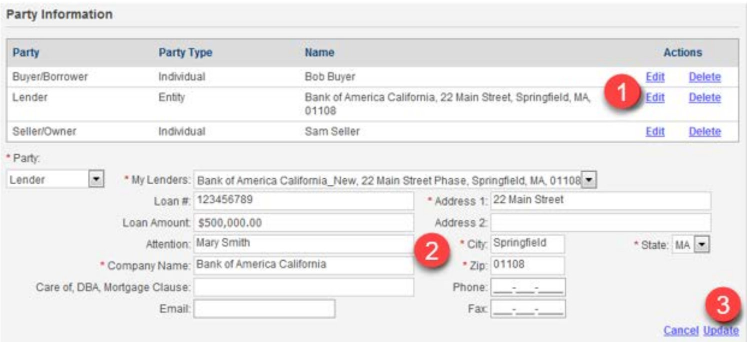
   NOTE: You can add Buyer(s), Seller(s), and/or Lender(s) at the same time



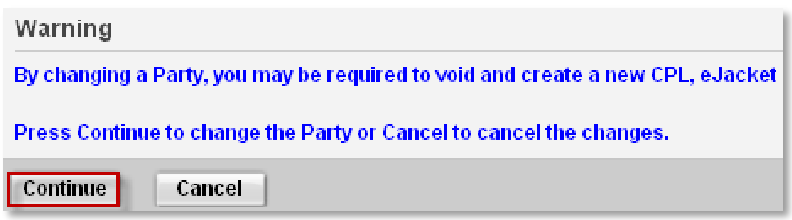
Revisions

Edit

1. Click **Edit** hyperlink in the Action column to the right of the Lender to be changed
2. Make needed change(s)
3. Click **Update** or **Cancel**

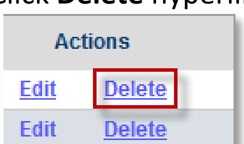


NOTE: You might receive this message if you have a CPL or eJacket created. You should consider updating or generating a new service as applicable and sending to affected parties. Click **Continue**.

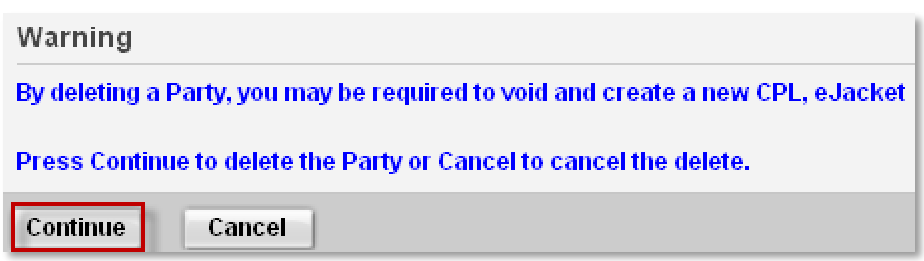


Delete

1. Click **Delete** hyperlink in the Action column to the right of to be deleted



2. You might receive this message if you have a CPL or eJacket created. You should consider updating or generating a new service as applicable and sending to affected parties. Click **Continue.**



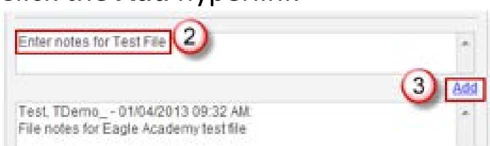
Notes Tab

The notes tab will allow users, with the approved user rights, to add notes at the file level. To obtain the user right refer to the job aid entitled, "Request Additional User Rights".

Add a Note

1. Select **Notes** tab from File Services screen

2. Enter notes into the upper **text box**
3. Click the **Add** hyperlink

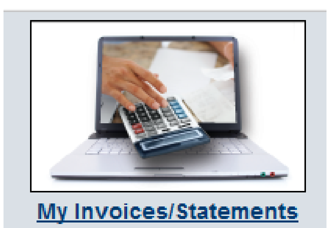


NOTE: The information added above will move to the bottom text box. Notes saved here will print on the File Summary page.

Invoices and Statements

Access

Click My Invoices/Statements on the AgentNet home screen.



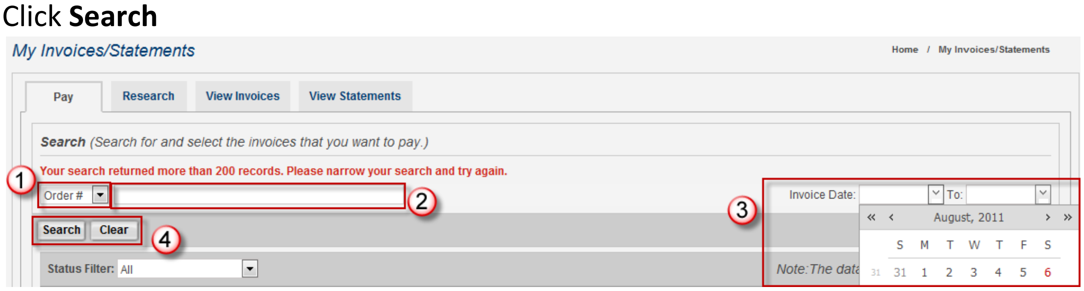
View Invoice and File Information

Search for Data

Each tab in the **My Invoices/Statements** section offers the ability to perform a search.

1. Select a search type from the dropdown menu provided in the **Search** area
2. Enter your search criteria in the field to the right of the dropdown menu
3. Select a date range to search from the dropdown menus provided on the far right
   NOTE: This option is not available for the **Research** tab.

4. Click **Search**



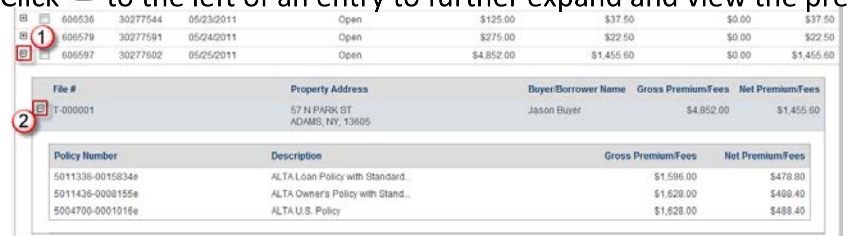
Filter and Sort Data

This option is not available for the **Research** or **View Statements** tabs.

1. **Filter** data by selecting from the dropdown menu provided
2. **Sort** data by clicking the column heading

Expand Data

1. Click ⊞ to the left of an entry to view the file detail
2. Click ⊞ to the left of an entry to further expand and view the premiums



Tabs

Pay

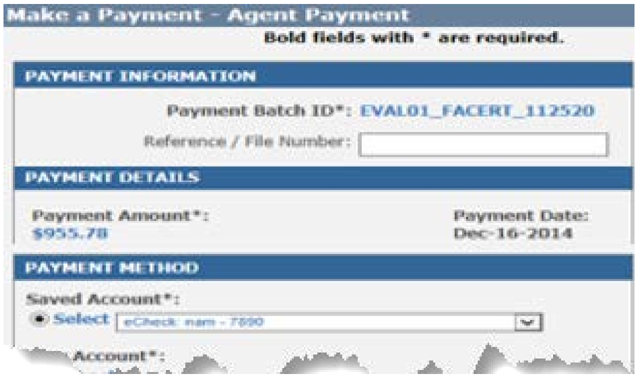
The **Pay** tab in **My Invoices/Statements** includes all outstanding invoices that are ready for payment. Invoices may be paid from this tab or from the **My Remittance Reporting** tab.

ePay an Invoice

Using ePay is considered to be an Automated Clearing House (ACH) transaction and you should refer to the trust accounting rules in your area for specifics on the actual process. If you have any questions, please contact your local First American representative.

To make an electronic payment (ePay) for an invoice:

1. Check the ☑ to the left of the invoice(s) you would like to pay
   NOTE: You may pay multiple invoices at one time.
2. Click ePay
3. Click **Yes** to continue to ePay window or **No** to cancel the ePay transaction



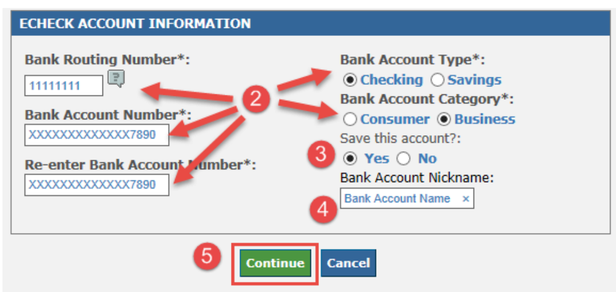
NOTE: The **Make a Payment** form will load once **Yes** is clicked in the previous step.

Set Up Chase eCheck Account

If you already have a Chase eCheck account established, proceed to **Pay with an Existing Chase eCheck Account** below.

1. Click the **New Account** radio button next to eCheck
   NOTE: New fields open below to enter bank account information

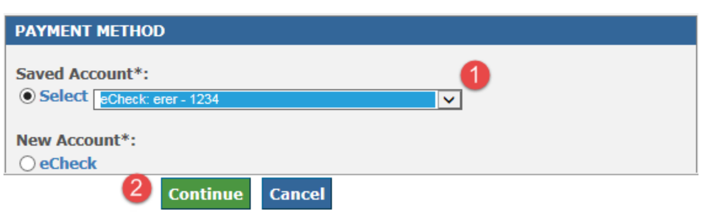
2. Complete the **Account Information** fields
3. Click **Yes** to save the account
4. Enter account **Nickname**
5. Click **Continue**



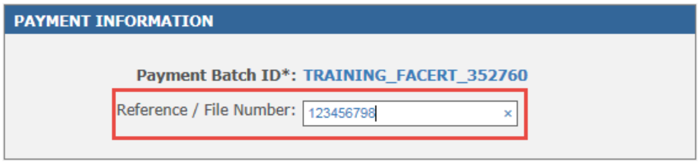
NOTE: Pay Connexion℠ is the system used to process Chase eChecks. Browsers must be TLS v1.2 enabled to access the Pay Connexion system. Chrome™, Firefox®, Internet Explorer®, and Safari® support the TLS v1.2 encryption protocol. Clients should confirm their browser security settings.

Pay with an Existing Chase eCheck Account

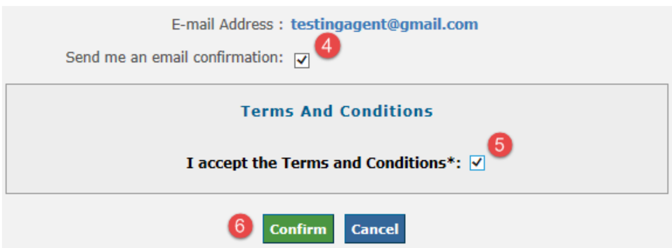
1. Select the appropriate account from the **Saved Account** dropdown menu
2. Click **Continue**

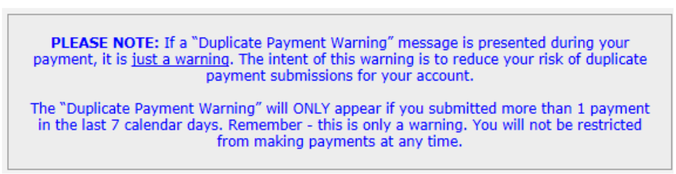


NOTE: You may enter your own Reference/File Number for easier tracking and later reference.



3. Verify your payment information.
4. Click the **Send me an email confirmation** checkbox
5. Click the checkbox to accept the **Terms and Conditions**
6. Click **Confirm**




PLEASE NOTE: If a "Duplicate Payment Warning" message is presented during your payment, it is just a warning. The intent of this warning is to reduce your risk of duplicate payment submissions for your account.

The "Duplicate Payment Warning" will ONLY appear if you submitted more than 1 payment in the last 7 calendar days. Remember - this is only a warning. You will not be restricted from making payments at any time.

NOTE: Payments made within 7 days of one another generate a "Duplicate Payment Warning." Remember – this is only a warning. You will not be restricted from making payments at any time.

Vendor ID for ACH transactions

If you have established an Automated Clearing House (ACH) debit block to your bank account, you will need to provide to your financial institution the appropriate First American Underwriter name and ACH Vendor ID so your debit requests can be processed. If your bank requires this, provide the most appropriate ACH Vendor ID for the appropriate underwriter from the list below:

ACH Vendor ID	Underwriter
9289310001	First American Title Insurance Company (FATIC)
9007629001	First American of Louisiana (FALA)
9124549001	Ohio Bar (OBTIC)
9580663001	First American Guaranty (FATGC)

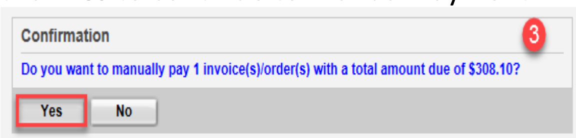
Manual Pay an Invoice

To make a manual payment on an invoice:

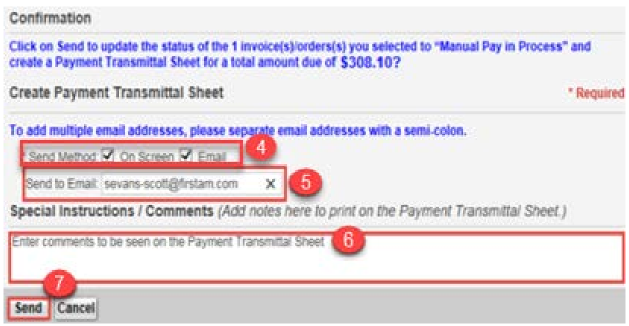
1. Check the ☑ to the left of the invoice(s) you would like to pay
   NOTE: You may pay multiple invoices at one time.

2. Click Manual Pay

3. Click **Yes** to continue to Manual Payment Window

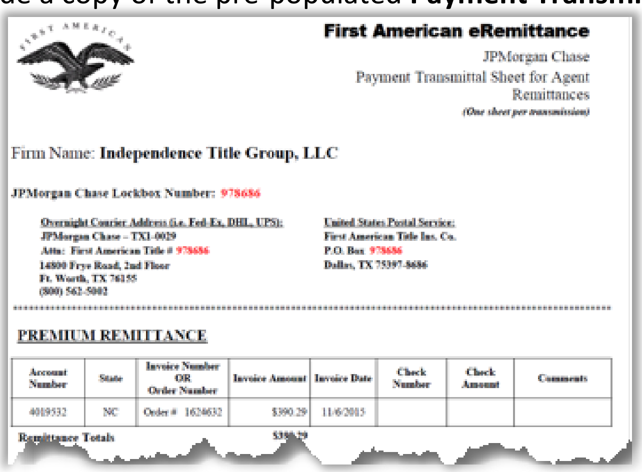


4. Click the ☑ next to any or all of the **Send Method** options you wish to use
5. If selecting to **Email** the **Payment Transmittal Sheet**, enter the desired email address in the **Send to Email** section provided
6. Insert any **Special Instructions/Comments** in the text box to show on the **Payment Transmittal Sheet**
7. Click the **Send** button to create the **Payment Transmittal Sheet** and execute all send methods selected



NOTES:

- If the **On Screen** send method is selected, a new window appears with a PDF image of the generated **Payment Transmittal Sheet**. You may print the sheet or save to your workstation.
- To cancel creating the **Payment Transmittal Sheet** without making a payment, click **Cancel**.
- If selecting to **Manual Pay** on AgentNet, all payments will be sent to a newly assigned lockbox, which may differ from your current lockbox location.
- Please include a copy of the pre-populated **Payment Transmittal Sheet** from AgentNet with your payment.



First American eRemittance

JPMorgan Chase
Payment Transmittal Sheet for Agent Remittances
(One sheet per transmission)

Firm Name: **Independence Title Group, LLC**

JPMorgan Chase Lockbox Number: 978686

Overnight Courier Address (i.e. Fed-Ex, DHL, UPS):
JPMorgan Chase – TX1-0029
Attn: First American Title # 978686
14800 Frye Road, 2nd Floor
Ft. Worth, TX 76155
(800) 562-5002

United States Postal Service:
First American Title Ins. Co.
P.O. Box 978686
Dallas, TX 75397-8686

PREMIUM REMITTANCE

Account Number	State	Invoice Number OR Order Number	Invoice Amount	Invoice Date	Check Number	Check Amount	Comments
4019532	NC	Order # 1624632	$390.29	11/6/2015			

Remittance Totals $390.29

Research

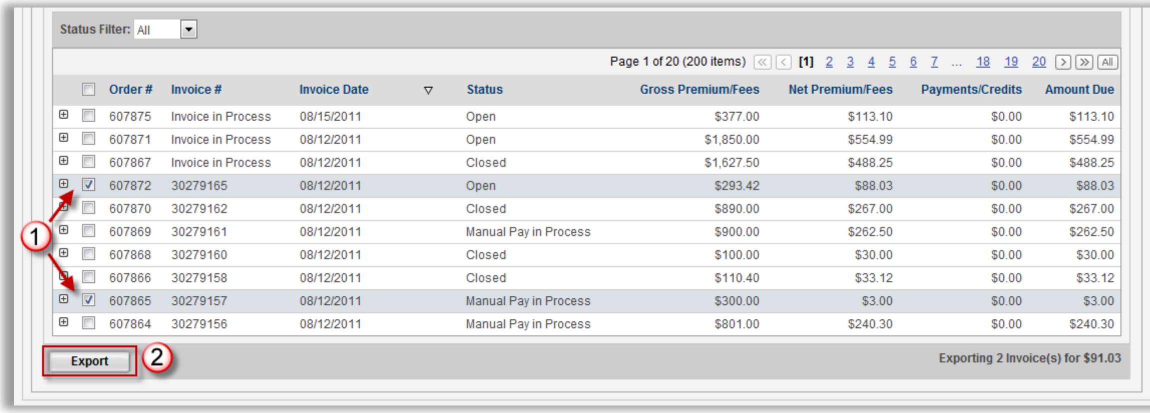
The **Research** tab in **My Invoices/Statements** is used for searching for specific files or invoices to view status and detailed premium and policy **information.**

View Invoices

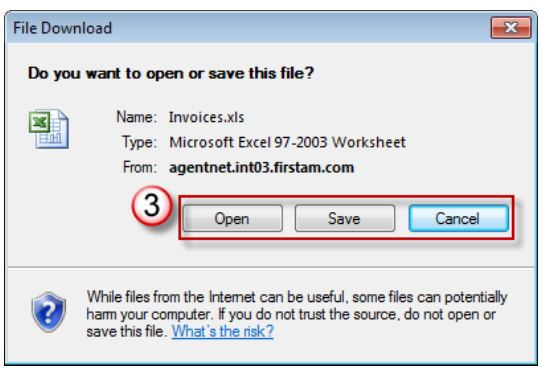
The **View Invoices** tab in **My Invoice/Statement** displays all invoices that have been processed along with any payments in process on those invoices. To export invoice data to a Microsoft Excel spreadsheet:

1. Check the box to the left of the invoice(s) you would like to export.
   NOTE: You may select as many invoices as you like.

2. Select the **Export** button



3. A window appears offering options to either **Open** the spreadsheet for immediate viewing, **Save** the spreadsheet to your workstation or **Cancel** the spreadsheet without viewing or saving



View Statements

The View Statements tab in My Invoices/Statements is where you will find your Agency statements from First American. As these statements are made available, they will appear in this tab for your reference
Manage Closing Attorneys.

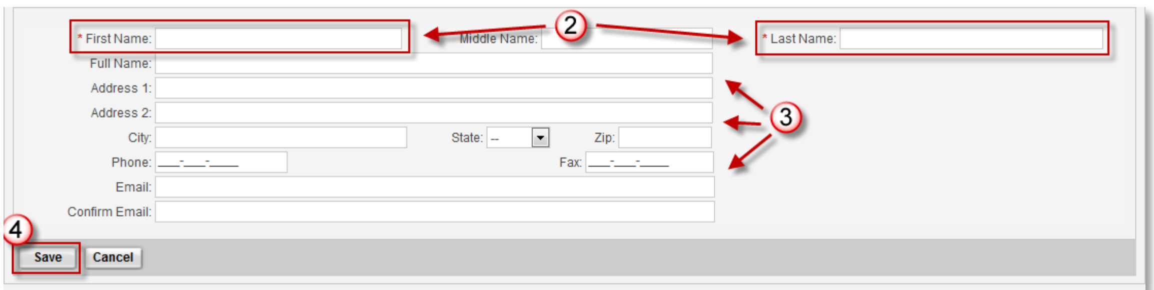
Access

From the **Administration** tab select **Manage My Closing Attorneys**.

Add Closing Attorneys

1. Click the **Add** button at the bottom of the page

2. Enter the **First Name** and **Last Name** in the fields (required)
3. Complete all appropriate fields remaining (optional)
4. Click **Save**



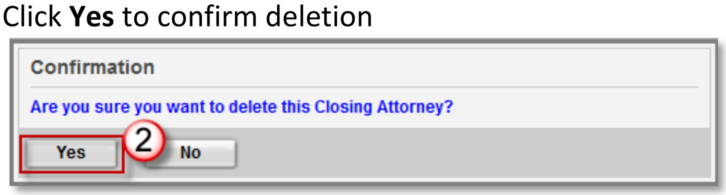
Manage Existing Closing Attorneys

Edit Closing Attorneys

1. Click Edit to the right of the **Closing Attorney** to be changed
2. Edit fields as desired
3. Click Delete

Delete Closing Attorneys

1. Click to the right of the **Closing Attorney** to be deleted
2. Click **Yes** to confirm deletion



NOTE: click **No** to cancel deletion.

My Files – Closing Protection Letters

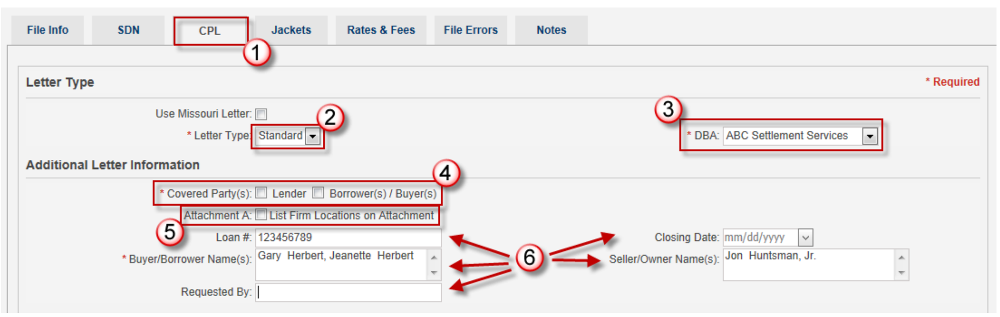
Generate a CPL

The **CPL** tab is available on the File Services page.

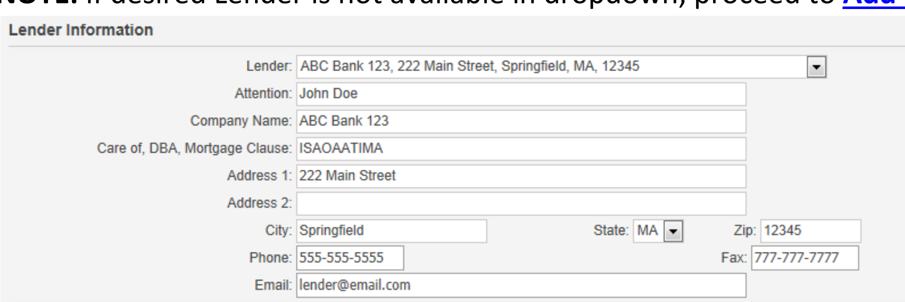
1. Click on the CPL tab
2. Select the **Letter Type** from the dropdown menu
   NOTE: selections in the dropdown menu will vary by state.

3. If a DBA is required to be listed on the CPL, make the appropriate selection in the dropdown menu
4. Select the **Covered Party(s)** if required in your area by checking the appropriate box
   NOTES:
   - Covered Party(s) selections may vary per state.
   - Marital status will be displayed on the CPL for **New Jersey** Properties, only if entered in the Covered Party(s) section. Manual entries, or edits to the auto-populated name will not display on the CPL. See New Jersey CPL - Edit.

5. If available in your area, you may add an attachment listing firm locations by checking the appropriate box
6. Enter or verify **Additional Letter Information**
   NOTE: Information entered previously in AgentNet will automatically populate



7. If the Lender has not already been added as a Party, select a Lender from the **Lender** dropdown menu to populate lender fields
   NOTE: if desired Lender is not available in dropdown, proceed to **Add New Lender** section below.



8. To perform the following next steps, click the appropriate hyperlink:
   a. Add/change Approved Attorney – **Select Approved Attorney**
   b. Add Additional Parties – **Additional Parties**
   c. Generate CPL - **Delivery Options**

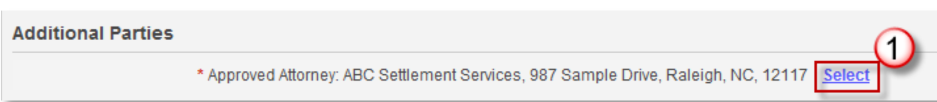
NOTE: If a CPL with the same letter type and same covered party already exists in your file, you will receive a warning message and encouraged to work from that CPL.

Additional Parties

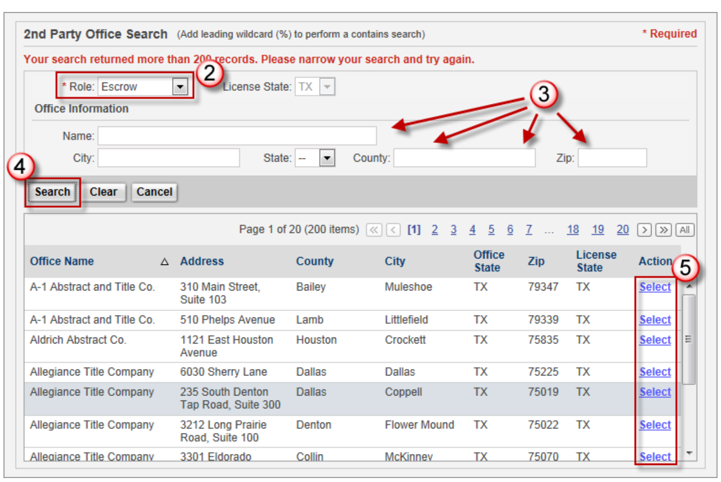
Follow the instructions below to add additional parties to your CPL. This can be used for areas that require an Approved Attorney. Or if the transaction is a split closing, for example, you may list the other Agency or Firm in this section. **The ability to add a 2nd Party to the Closing Protection Letter (CPL) is optional** and used when two different parties are involved in the transaction.

For **Approved Attorneys** jump to **Select Approved Attorney**
NOTE: This may include Agent A acting as the Escrow/Settlement agent, and Agent B acting as the Title agent. Some lenders may require both parties be listed on the CPL and using the 2nd Party feature supports this need.

1. Click **Select**



2. Select the **Role** from the dropdown menu
3. Under **Office Information**, enter the **Name**, **City, State, County** and **Zip** or leave blank to search for all within the state
4. Click **Search**
5. Click Select next to the office you wish to add



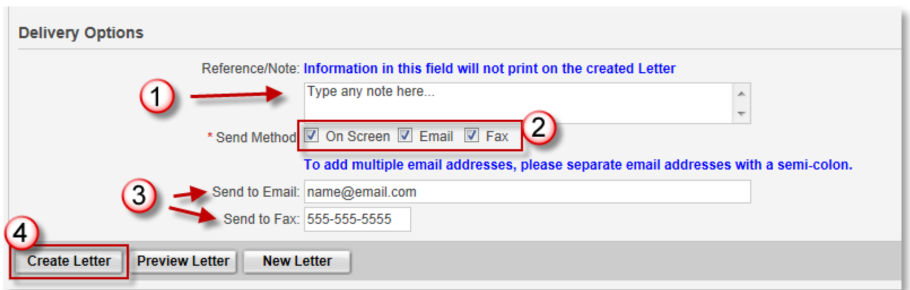
6. Proceed to step 8 in **Generate a CPL**

Delivery Options

1. Enter in a **Reference/Note** if desired (does not appear on the CPL)
2. Check the ☑ next to your preferred send method(s)
   a. **On Screen** – displays the letter on your computer in PDF format
   b. **Email** – emails the letter to the address you designate
   c. **Fax** – faxes the letter to the number you designate

3. Enter the appropriate email address and/or fax number for delivery
   NOTE: To add multiple email addresses, separate with a semi-colon.

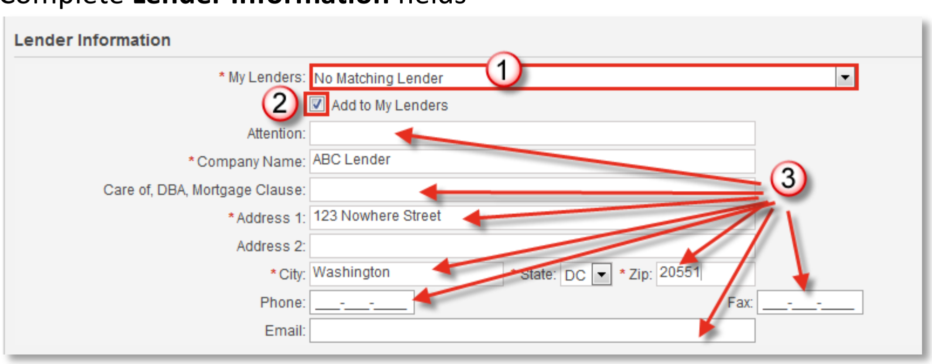
4. Click **Create Letter** to execute all checked send methods
   NOTE: Click **Preview Letter** to view before sending (DRAFT).



5. Click **New Letter** clears all information entered
6. Click **Save**

Add New Lender

1. Select **No Matching Lender** from the My Lenders dropdown menu
2. To save this lender for future use, check ☑ **Add to My Lenders**
3. Complete **Lender Information** fields

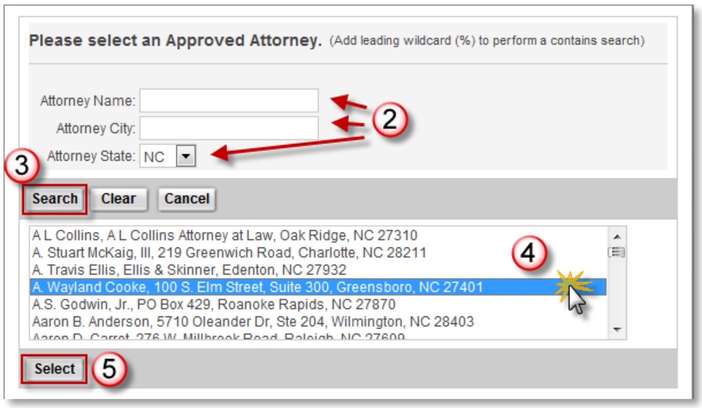


4. Proceed to [Delivery Options](#delivery-options)
   NOTE: Fields with * are required

Select Approved Attorney

This functionality is only available if the property is in a state that requires the designation and use of an **Approved Attorney**.

1. Click Select to the right of the default **Approved Attorney** to edit selection
2. Enter the **Attorney Name**, **Attorney City** and **Attorney State** or leave the name and city blank to search for all within the state
3. Click **Search**
4. Click the **Approved Attorney** to select
5. Click **Select**



6. Proceed to **Delivery Options**

View, Edit or Void a CPL

Once a CPL has been generated, it is added to the Letters queue at the top of the CPL tab.

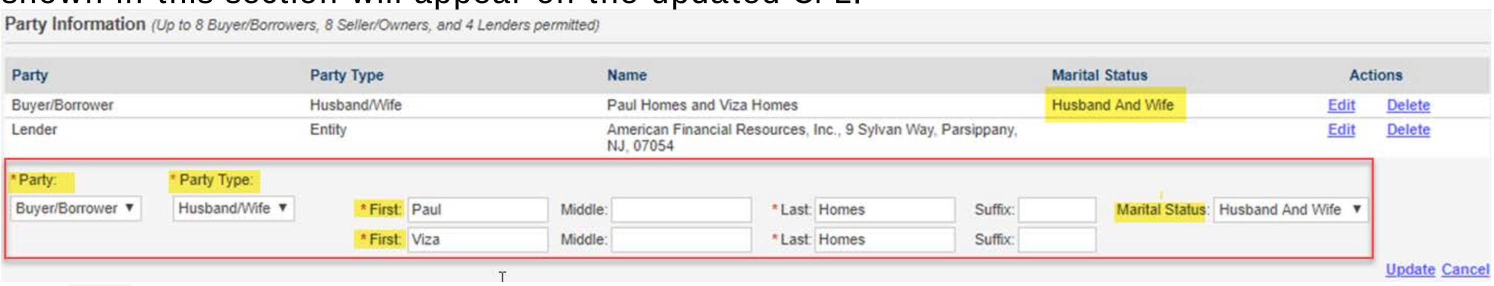
1. Click ⊞ to expand the information
2. Click **Edit** to modify a CPL
3. Click **Void All** in the **Actions** column to void all CPL's for that letter type and file
4. Click ▯ to view a PDF image
5. Click **Void** in the **Actions** column to void a specific CPL
6. Click **View All** to view all generated letters

New Jersey CPL - Edit

After successfully creating a CPL, if you need to modify the Buyer/Borrower names for a New Jersey property, you will need to update the **Buyer/Borrower** field in the **Party Information** section before editing the CPL.

1. Click Edit
2. In the **Party** section, edit **Party/Party Type/Name(s)/Marital Status** as needed

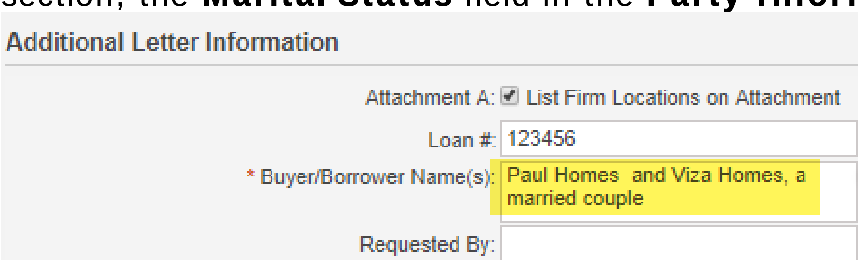
   NOTE: If the **Martial Status** is edited under the **Party** section, it will not appear in the Buyer/Borrower section of the **Additional Information** section below. **Marital Status** shown in this section will appear on the updated CPL.



3. Click Update
4. Click Continue in the **Warning** message window
5. Click Edit in the **Letters** section
6. Verify **Closing Attorney Information/ Additional Parties,** if applicable

NOTES:

- If you edit the **Buyer/Borrower** name in the **Additional Letter Information** section, you will need to <u>manually</u> add the **Marital Status** here with your changes.
- Once you type in the **Buyer/Borrower** field in the **Additional Letter Information** section, the **Marital Status** field in the **Party Information** section will be overridden.



7. Select **Delivery Option(s)**

   NOTE: You must enter **Email** address if selecting as the **Send Method**.

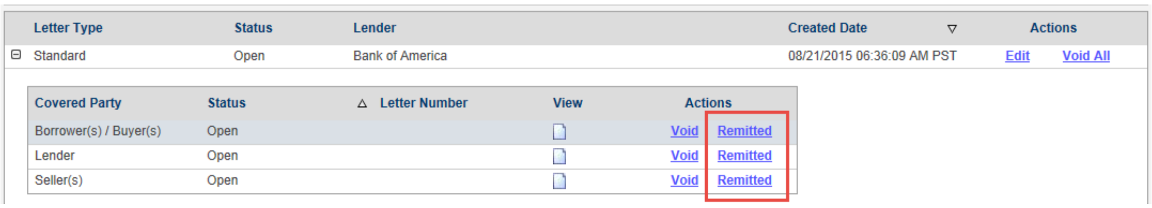
8. Click Update Letter

   NOTE: Use appropriate **Print/Save/PDF** button in the CPL window, if selecting **On Screen** as your selected **Send Method.**

Change CPL Status

AgentNet users in states that collect premiums on CPLs, with activity rights to electronically Remit and Pay, have the ability to change the status of a CPL in AgentNet. In scenarios where a CPL was previously reported to First American, users can change the status from "Open" to "Remitted". Follow the steps below to change a CPL status:

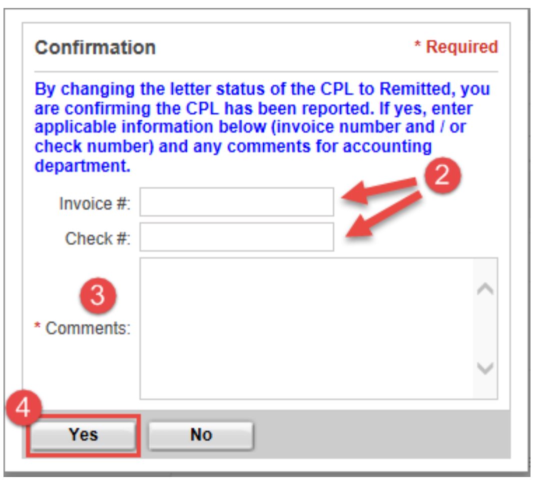
1. Click Remitted next to the letter you wish to change the status for



2. In the pop-up window, complete the appropriate fields
3. You must enter a something in the comments field

NOTE: It is recommended to enter details regarding when the CPL was reported.

4. Click **Yes**



NOTE: By changing the letter status of the CPL to "Remitted", you are confirming the CPL has already been reported to First A.

My Files – Generate eJackets

The **Jackets** tab is available on the **File Services** page.

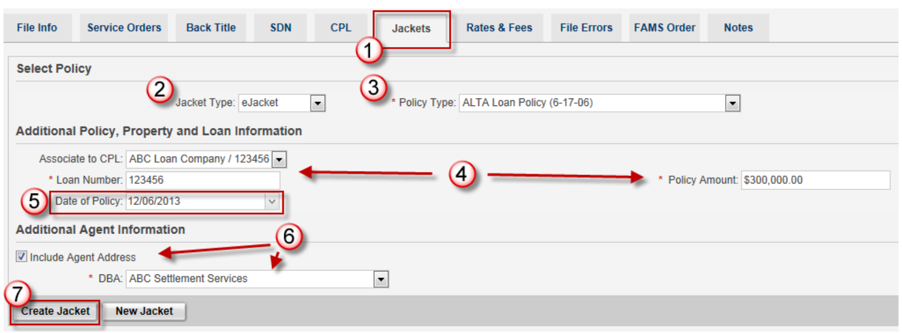
Generate Standard Policy eJacket

1. Click **Jackets**
2. Select "eJacket" as the **Jacket Type**
3. Select **Policy Type** from the dropdown menu
   NOTE: selections in the dropdown menu will vary by state.

4. Complete all required fields with *
   NOTE: If a CPL has already been generated, the Lender information will have automatically populated.

5. You may select a **Date of Policy**
   NOTE: Although this field is optional, it is recommended.

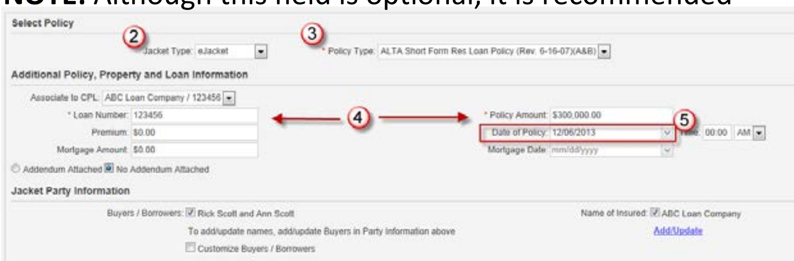
6. If you checked the box for **Include Agent Address**, select a DBA (Doing Business As) option from the dropdown menu
7. Click **Create Jacket** to create your eJacket, generate a policy number and store your Jacket in the policies queue



NOTE: Click **New Jacket** to erase all data entered. Each file has a limit of 5 eJackets. A new file must be generated if there are additional jackets required.

Generate a Short Form Policy eJacket

1. Click on the **Jackets** tab
2. Select “eJacket” as the **Jacket Type**
3. Select the **Short Form Policy Type** from the dropdown menu
   NOTE: selections in the dropdown menu will vary by state.
4. Complete all required fields with *
   NOTE: If a CPL has already been generated, the Lender information will have automatically populated.
5. You may select a **Date of Policy**
   NOTE: Although this field is optional, it is recommended



6. Click the ☑ for all applicable **Endorsements**
7. If you checked the box for **Include Agent Address**, select a DBA (Doing Business As) option from the dropdown menu
8. Click **Create Jacket** to create your eJacket, generate a policy number and store your Jacket in the policies queue.

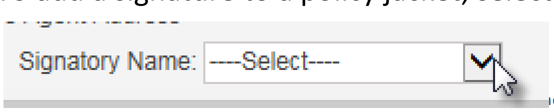
NOTES:

- If you wish to enter Jacket information but not generate the policy number, click **Save** instead of Create Jacket. This may be useful if you wish to calculate Rates & Fees (see job aid entitled My Files-Rates & Fees in User Guides tab).
- To erase all data entered you can click **New Jacket**.

Add Electronic Signature

AgentNet provides the option for you to add an electronic signature to Short Form policy jackets and any other form that offers an Authorized Countersignature line. To add an electronic signature to a policy jacket, you must first have signatures stored in your AgentNet account for your firm’s authorized signatories. Refer to the job aid entitled “Manage eSignatures” for more information.

To add a signature to a policy jacket, select the appropriate signature from the **Signatory Name** dropdown menu.



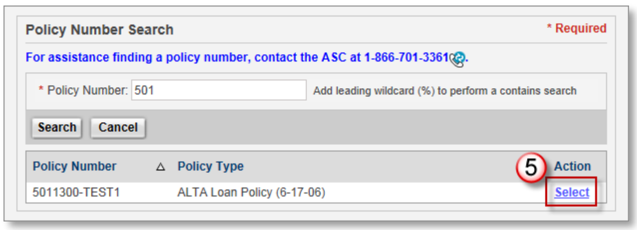
Assign a Virtual or Paper Policy Jacket to a file

Assigning a Paper/Virtual Policy Jacket enables you to price and remit on Paper/Virtual policy inventory using AgentNet. Follow the steps below to assign a Paper or Virtual Policy Jacket.

1. Click Jackets
2. Select "non-eJacket" as the **Jacket Type**
3. Enter a **Policy Number** in the required field
4. Click Search

   NOTE: A new window opens displaying the Policy Numbers that match your search.

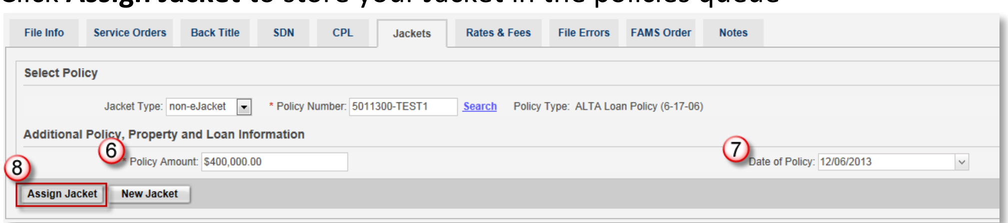
5. Click Select next to the Policy Number you wish to use



6. Enter the **Policy Amount**
7. You may select a **Date of Policy**

   NOTE: Although this field is optional, it is recommended.

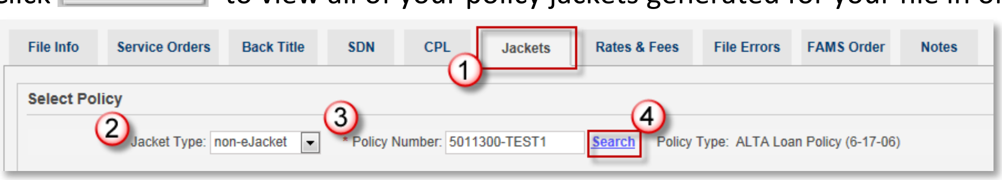
8. Click **Assign Jacket** to store your Jacket in the policies queue



View, Edit or Void a Jacket

Once a Policy Jacket has been assigned, it is added to the Policies queue at the top of the **Jackets** tab.

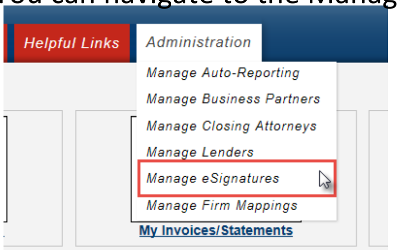
1. Click under View to open a PDF image of your eJacket
2. To make changes to your Jacket, click Edit in Action column
3. To void a Jacket, click Void in Action column
4. Click View All to view all of your policy jackets generated for your file in one PDF document



Manage eSignatures

Navigate to Manage eSignatures Page

You can navigate to the Manage eSignatures option within the “Administration” tab in AgentNet.



NOTE: You will see a list of your firm’s authorized signatories on the **Manage eSignatures** page.

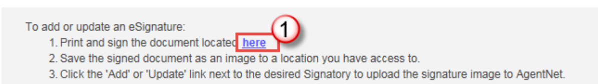
About eSignatures

You can add and maintain electronic signatures for your firm in the **Manage eSignatures** page. Only authorized signatories for your firm will be available for adding a signature. If you do not see an authorized signatory for your firm, please contact your local First American representative in resolving the matter.

Add an eSignature

Follow the steps below to add an electronic signature to your firm.

1. Click the “here” link at the bottom of the page to open the new signature form



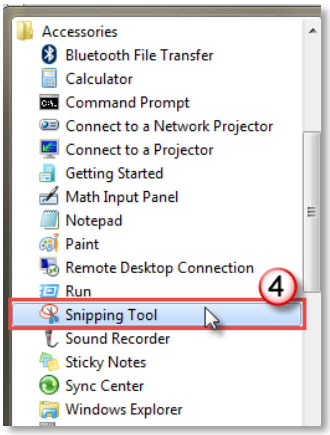
2. The form will open as a pdf in a new window, click to print
   NOTE: The appropriate authorized signatory for your firm must sign the form within the box provided.
3. Scan the signed form to your computer using a jpeg format
   NOTE: The required format is a jpeg. If your scanner does not save as a jpeg, refer to the section entitled Convert Scanned Signature to JPEG.
4. On the **Manage eSignatures** page in AgentNet, click Add hyperlink corresponding to the appropriate authorized signatory
5. In the **Upload eSignature** screen, click Browse
6. Locate and select the saved jpeg file with the correct signature
7. Click Open
   NOTE: Your signature will load into the “Upload eSignature” window. Click Clear to remove the signature and upload again, if necessary.
8. Click either **Save** or **Done**

NOTE: Back on the Manage eSignatures page, your signature will appear next to the signatory name you selected. At his point, you can add this signature to Short Form policy jackets and any other form that offers an Authorized Countersignature line.

Convert Scanned Signature to JPEG

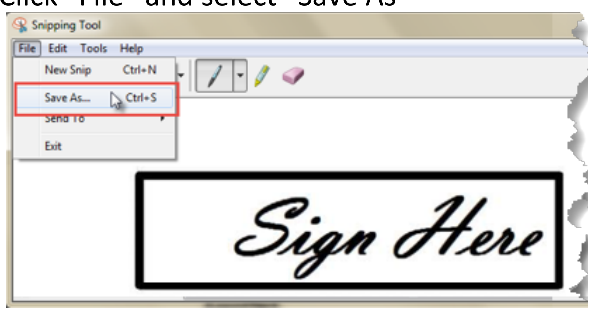
Follow the steps below to convert your scanned pdf signature to a JPEG file.

1. Open the saved signature page
2. Click 
3. Click All Programs and then click the Accessories folder
4. Select the **Snipping Tool**

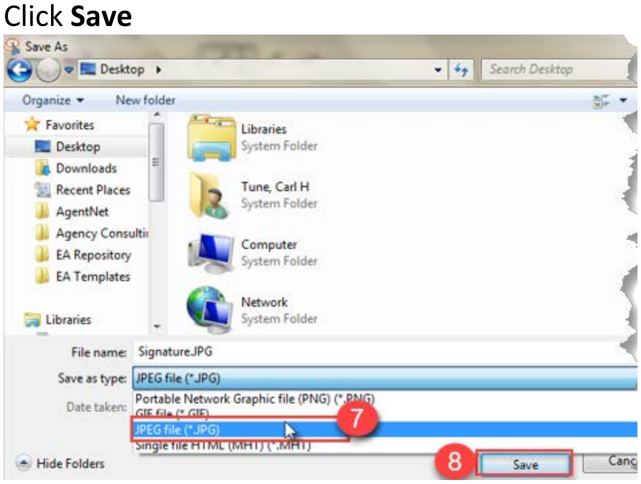


5. Using the Snipping Tool, drag your cursor around the signature box of your pdf file
   NOTE: A new window will open with your selection.

6. Click "File" and select "Save As"



7. Change the **Save As File Type** to "JPEG"
8. Click **Save**



9. Continue from Step 8 in **Add an eSignature**

Manage Your Signatures

You can manage your existing signatures from the Manage eSignatures page. Follow the steps below:

Update an eSignature

To update an existing eSignature, click the Update hyperlink and follow the Add an eSignature steps beginning with Step 6.

Delete an eSignature

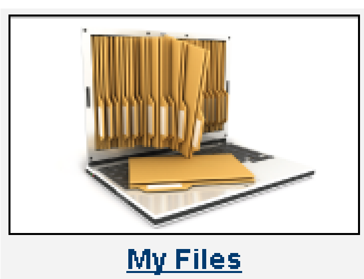
To remove an electronic signature, click the Delete hyperlink and click the "Continue" button.

My Files – eJackets NY

Access

Navigate to **Jackets** by clicking on the **My Files** icon on the AgentNet home page.

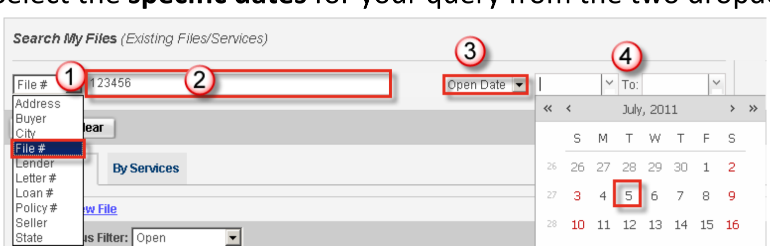
From the **My Files** screen select:



1. **By Files** to search for existing files associated with your account
2. **By Services** to select a specific service and identify files that have that service created
3. **By Shared Files** to search for a file shared by or with a business partner.

Search for a File

1. Select your preferred **search parameter** from the dropdown menu
2. Enter the specific **criteria** to locate your file
3. Select either **Open Date** or **Close Date**
4. Select the **specific dates** for your query from the two dropdown menus

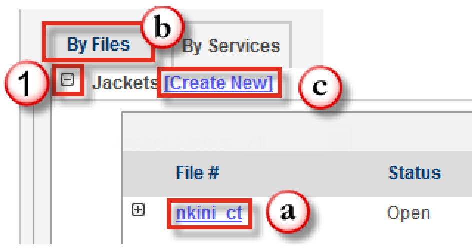


View By Files

1. From the By Files tab click ⊞ to the left of the file number to expand the file's information
   a. If Jackets appears in the list of services for your file, click on this hyperlink to view the information
   OR
   b. Click [Create New Service] to generate eJacket(s) for the file

View By Services

1. From the By Services tab click ⊞ to the left of Jackets to display a list of files with eJackets attached
   a. Click on the **File #** to open that file
   OR
   b. If an **existing file** does not appear, click By Files tab to locate the file and create a new file for it
   OR
   c. Click [Create New] to create a **new file** with eJacket(s) attached



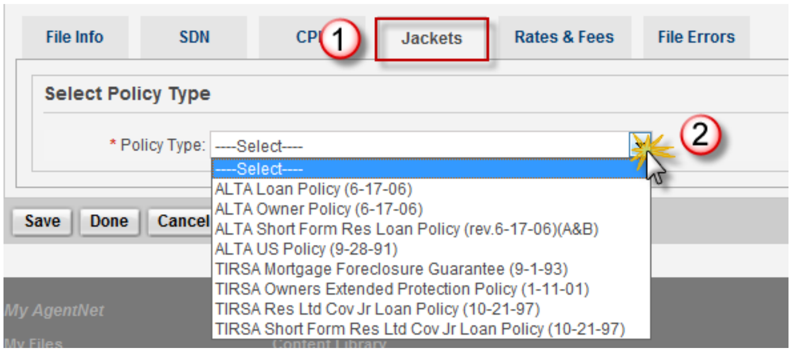
View By Shared Files

1. From the By Shared Files tab click ⊞ to the left of the file number to expand the file's information
   a. If Jackets appears in the list of services for that file, click on this hyperlink to view the information
   OR
   b. Click [Create New Service] to create back title for the file

Note: A will appear next to the file number if this file is being shared by your firm with a partner firm. Only your firm can discontinue sharing it. A will appear next to the file number if this file is being shared with your firm by a partner firm. Only the partner firm can discontinue sharing it.

Generate Standard Policy eJacket

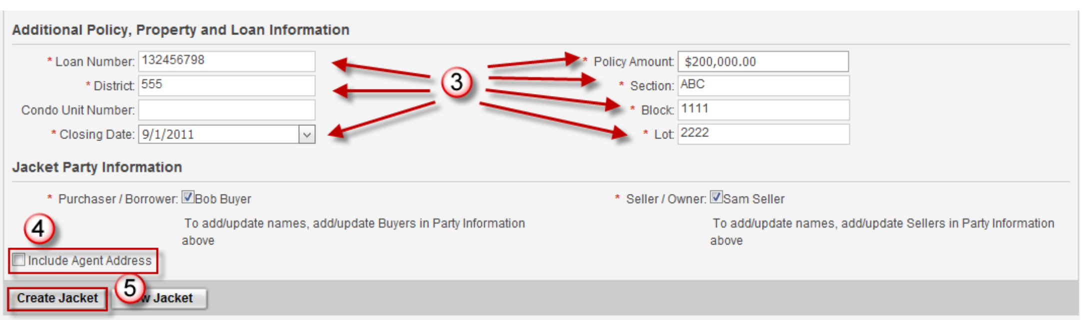
1. Click on the **Jackets** tab from the **File Services** page
2. Select **Policy Type** from the dropdown menu



3. Complete the fields provided

   NOTES:
   - Fields with * are required.
   - The **District** field is required for Suffolk County.
   - **Closing Date** must be no more than 6 months before or 2 months after the current date.
   - Some of the fields will populated with the file information designated when entering property information.

4. Click ☑ next to **Include Agent Address** to display your firm address in the jacket
5. Click **Create Jacket** to generate your eJacket, generate a policy number and store your Jacket in the policies queue

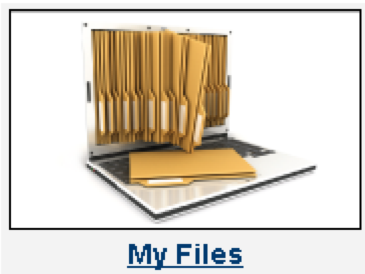


NOTE: Click **New Jacket** to erase all data entered.

My Files - eJackets TX Co-Op

Navigate to eJackets

Navigate to **Jackets** by clicking on the **My Files** icon on the AgentNet home page.

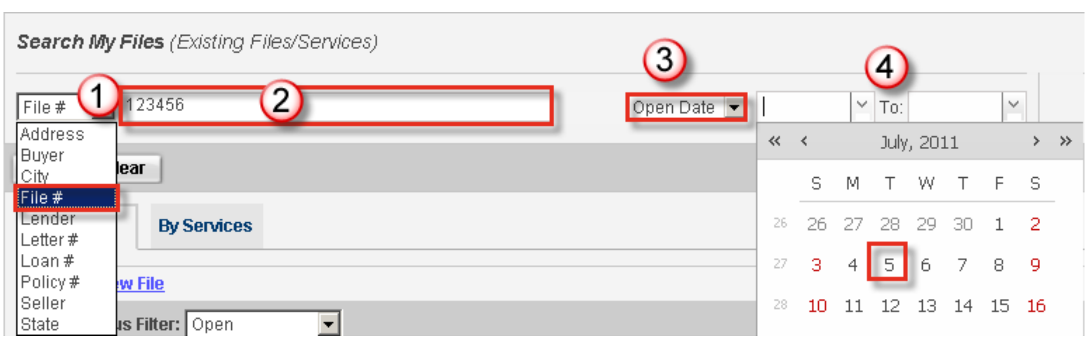


From the **My Files** screen select:

1. **By Files** to search for existing files associated with your account
2. **By Services** to select a specific service and identify files that have that service created
3. **By Shared Files** to search for existing files shared by or with a business partner.

Search for a File

1. Select your preferred **search parameter** from the dropdown menu
2. Enter the specific **criteria** to locate your file
3. Select either **Open Date** or **Close Date**
4. Select the **specific dates** for your query from the two dropdown menus



View By Files

1. From the By Files tab click ⊞ to the left of the file number to expand the file's information

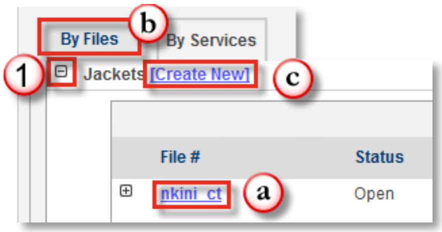
   a. If Jackets appears in the list of services for your file, click on this hyperlink to view the information

   OR

   b. Click [Create New Service] to generate eJacket(s) for the file

View By Services

1. From the By Services tab click ⊞ to the left of Jackets to display a list of files with eJackets attached
   a. Click on the **File #** to open that file
   OR
   b. If an **existing file** does not appear, click By Files tab to locate the file and create a new file for it
   OR
   c. Click [Create New] to create a **new file** with eJacket(s) attached



View By Shared Files

From the By Shared Files tab click ⊞ to the left of the file number to expand the file's information

a. If Jackets appears in the list of services for that file, click on this hyperlink to view the information
OR
b. Click [Create New Service] to create back title for the file

Note: A will appear next to the file number if this file is being shared by your firm with a partner firm. Only your firm can discontinue sharing it. A will appear next to the file number if this file is being shared with your firm by a partner firm. Only the partner firm can discontinue sharing it.

enerate an eJacket

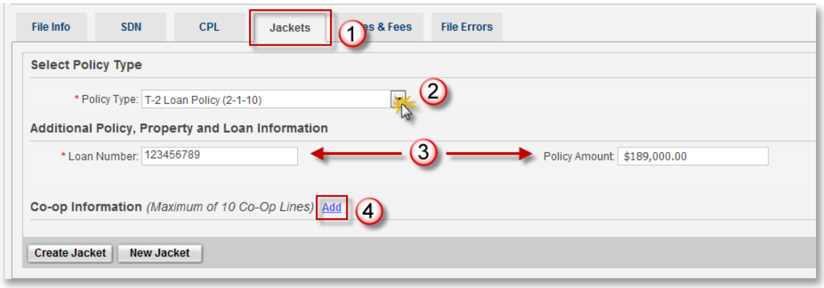
The **Jackets** tab is available on the **File Services** page.

Generate Standard Policy eJacket with Co-op Information

1. Click Jackets
2. Select **Policy Type** from the dropdown menu
   NOTE: selections in the dropdown menu will vary by state.

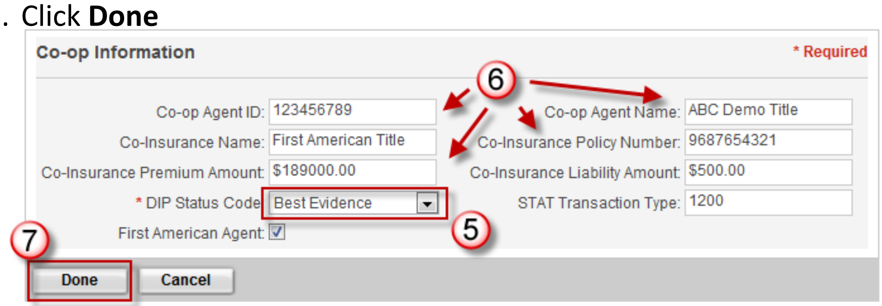
3. Complete the **Additional Policy, Property and Loan Information** fields
   NOTE: Fields not highlighted with a * are not required.

4. Click Add to the right of **Co-op Information**



5. In the **Co-op Information** window, select the appropriate **DIP Status Code** from the dropdown menu
   NOTE: The DIP (Directly Issued Policy) Status Code options are **Best Evidence**, **Multi County** or **Out of County**.

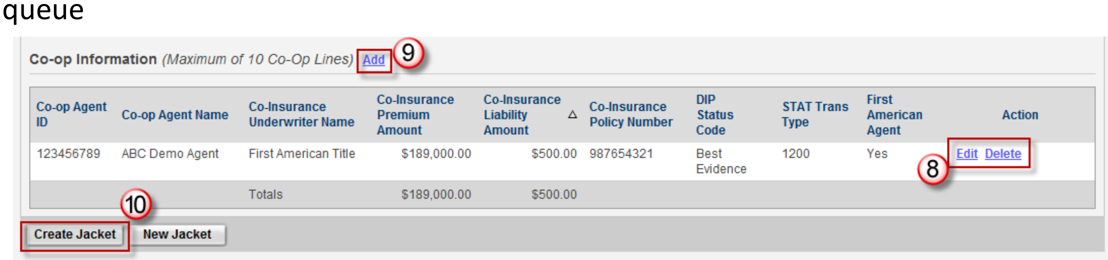
6. Complete all appropriate **Co-op Information** fields
7. Click **Done**



NOTE: The co-op information you entered appears below.

8. Click Edit to make any changes to the information or click Delete to delete the co-op info
9. Click Add to the right of **Co-op Information** to add any additional co-op lines
   NOTE: you may add a maximum of 10 lines.

10. Click **Create Jacket** to generate your eJacket, generate a policy number and store your Jacket in the policies queue



NOTE: Click **New Jacket** to erase all data entered

My Inventory

Access

Click **My Inventory** icon

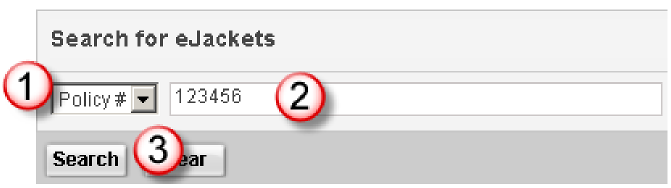
Open eJackets

Search

1. Select **Policy #** or **Form #** from the dropdown menu
2. Enter the **Policy** or **Form** number in the field

NOTE: Enter **%** in front of search criteria to perform a “contains” search.

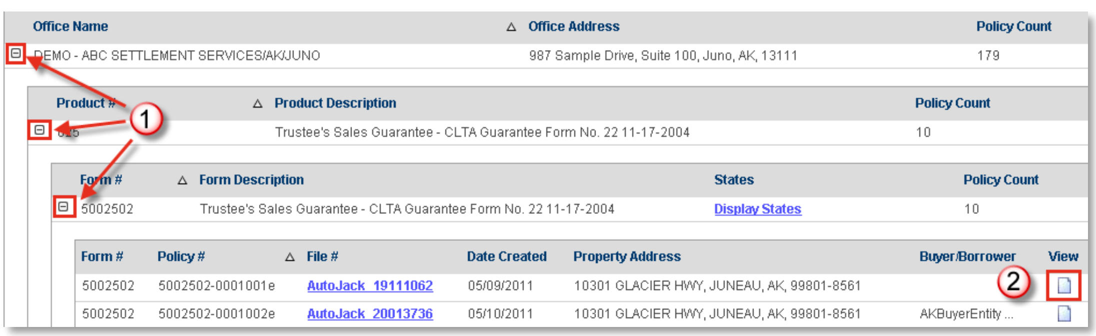
3. Click **Search**



NOTE: Newly ordered eJackets will not appear in My Inventory for approximately 24 hours.

View

1. Click as needed to drill down
2. Click to view eJacket



Open Paper/Virtual

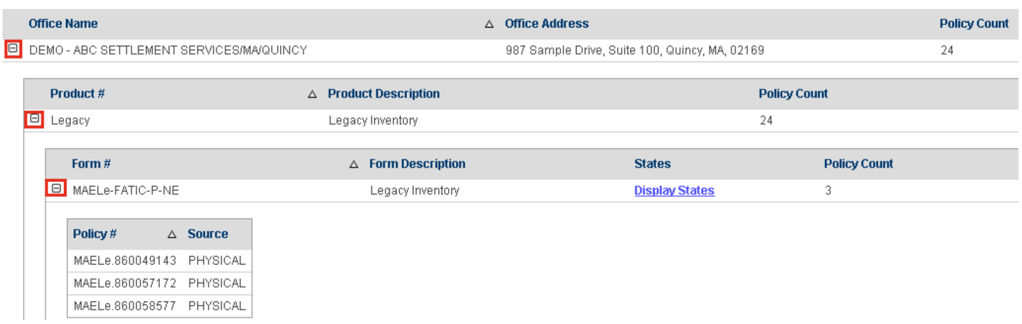
Search

1. Select **Policy #** or **Form #** from the dropdown menu
2. Enter the **Policy** or **Form** number in the field
   NOTE: Enter **%** in front of search criteria to perform a "contains" search.

3. Click **Search**

View

Click as needed to drill down



Open CPL

Search

1. Enter the **Letter** number in the field
   NOTE: Enter **%** in front of search criteria to perform a "contains" search.

2. Click **Search**

NOTE: Newly ordered CPL's will not appear in My Inventory for approximately 24 hours.

View

1. Click as needed to drill down
2. Click to view CPL

Invoice

Search

1. Select **File #** or **Policy #** from the dropdown menu
2. Enter the **File** or **Policy** number in the field
 NOTE: Enter **%** in front of search criteria to perform a “contains” search.

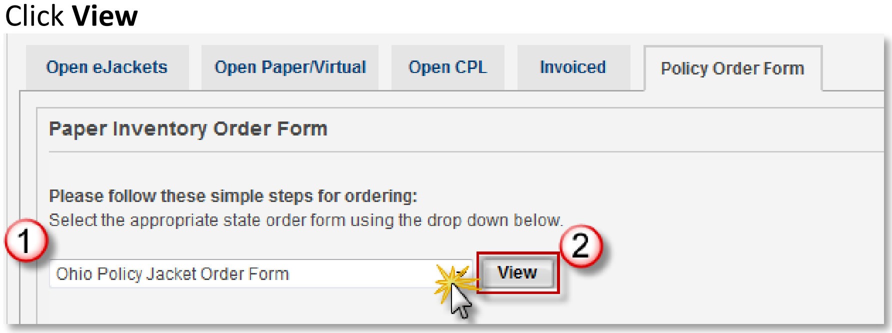
3. Click **Search**

Policy Order Form

AgentNet users can order paper policy jackets by using the order form located in **My Inventory.**

1. Select the appropriate form for the state you wish to order paper jackets for
 NOTE: Each state has a different form. Some areas provide the option to submit your request online. Or you may print a form and submit your request manually.

2. Click **View**

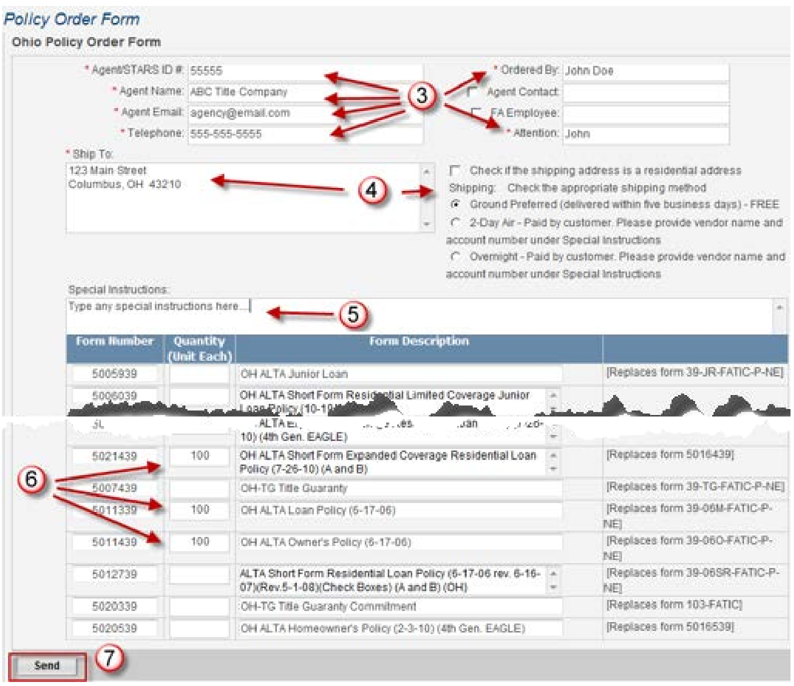


NOTE: For forms that require manual completion, please refer below to **Manual Form Completion**. For online forms, please continue to step 3

3. Enter the appropriate information in the required fields
4. Enter shipping information
5. Provide any special instructions
6. Enter the quantity required for policy form requested

   NOTE: Must be in multiples of 50.

7. Click **Send**



Policy Order Form

Ohio Policy Order Form

* Agent/STARS ID #: 55555
* Agent Name: ABC Title Company
* Agent Email: agency@email.com
* Telephone: 555-555-5555
* Ordered By: John Doe
Agent Contact:
FA Employee:
* Attention: John
* Ship To:
123 Main Street
Columbus, OH 43210
Check if the shipping address is a residential address
Shipping: Check the appropriate shipping method
Ground Preferred (delivered within five business days) - FREE
2-Day Air - Paid by customer. Please provide vendor name and account number under Special Instructions
Overnight - Paid by customer. Please provide vendor name and account number under Special Instructions
Special Instructions:
Type any special instructions here...

Form Number	Quantity (Unit Each)	Form Description	
5005939		OH ALTA Junior Loan	[Replaces form 39-JR-FATIC-P-NE]
5006039		OH ALTA Short Form Residential Limited Coverage Junior Loan Policy (10-1[illegible]	
[illegible]		ALTA [illegible] 10) (4th Gen. EAGLE)	
5021439	100	OH ALTA Short Form Expanded Coverage Residential Loan Policy (7-26-10) (A and B)	[Replaces form 5016439]
5007439		OH-TG Title Guaranty	[Replaces form 39-TG-FATIC-P-NE]
5011339	100	OH ALTA Loan Policy (6-17-06)	[Replaces form 39-06M-FATIC-P-NE]
5011439	100	OH ALTA Owner's Policy (6-17-06)	[Replaces form 39-06O-FATIC-P-NE]
5012739		ALTA Short Form Residential Loan Policy (6-17-06 rev. 6-16-07)(Rev.5-1-08)(Check Boxes) (A and B) (OH)	[Replaces form 39-06SR-FATIC-P-NE]
5020339		OH-TG Title Guaranty Commitment	[Replaces form 103-FATIC]
5020539		OH ALTA Homeowner's Policy (2-3-10) (4th Gen. EAGLE)	[Replaces form 5016539]

Send

Manual Form Completion

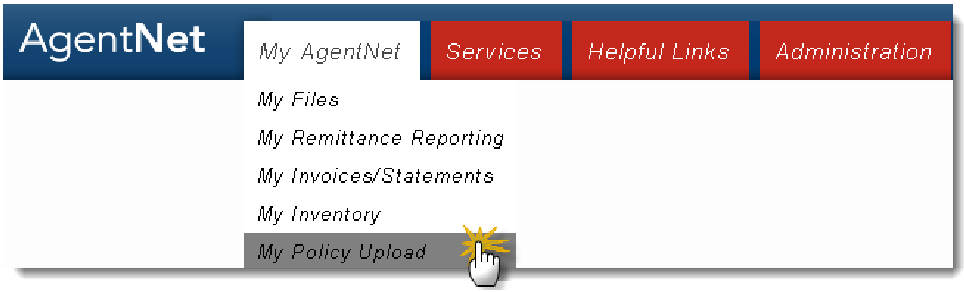
1. Enter the appropriate information in the required fields
2. Enter shipping information
3. Provide any special instructions
4. Enter the quantity required for policy form requested

   NOTE: Must be in multiples of 50.

5. Send the completed form to First American:
   a. Email: agentforms@firstam.com
   b. Fax: (877) 298-0309

My Policy Upload

From the My AgentNet tab on the home page, select **My Policy Upload**



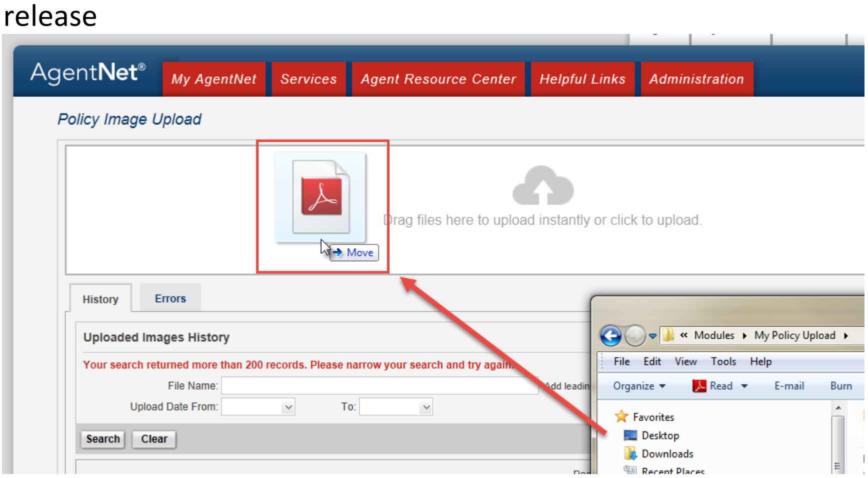
Upload New Policy Images

Follow the steps below to upload policy images into the My Policy Upload feature in AgentNet. You have two options, you can simply grab the document from a folder on your computer and drag it into the window or you can simply browse for the appropriate file.

Drag Image Documents into the Browser

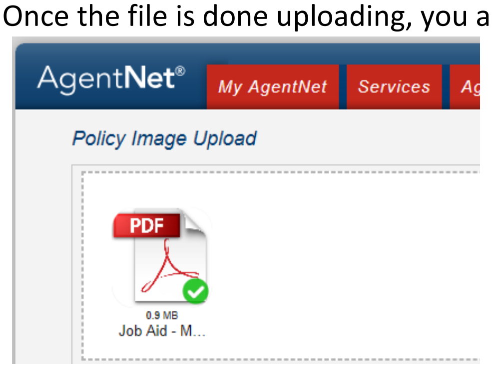
Using the policy upload feature in AgentNet is easy. One method of uploading policy images is to just drag them into the area provided. Follow the steps below:

1. On your computer workstation, open the folder in Windows Explorer where your image files are located
2. Grab the appropriate image file with your cursor, drag it to the area provided on your internet browser and release



NOTE: You can drag multiple items at once.

3. Once the file is done uploading, you are finished. The image file is now stored in AgentNet

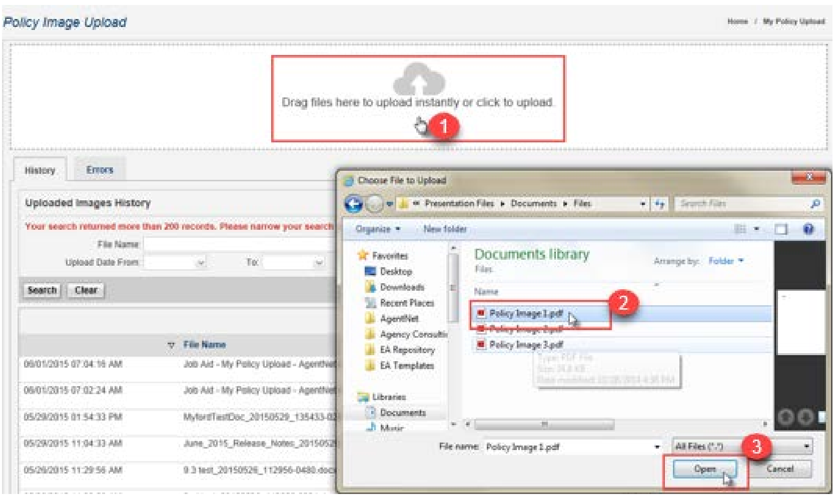


Browse for image file

You can also browse for image files on your computer and select them for upload as well. Follow the steps below:

1. From the **Policy Image Upload** screen, click in the area provided to open your windows browser
2. Select the appropriate image file
3. Click **Open**

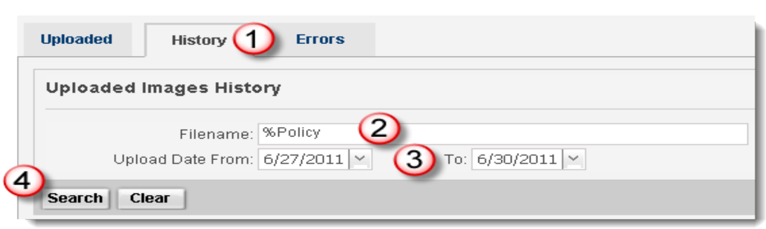
NOTE: You can select multiple files at a time.



4. Once the file is done uploading, you are finised. The image file is now stored in AgentNet

Search Policy Images

1. Select the **Uploaded**, **History** or **Error** tab
2. Complete the **Filename** field
   NOTE: to perform a wildcard search, type search information with the % sign in front of it.
   NOTE: the Filename field is not required for a search.
3. Complete **Upload Date From** and **To** fields
4. Click **Search**



NOTE: to conduct a new search, click **Clear**.

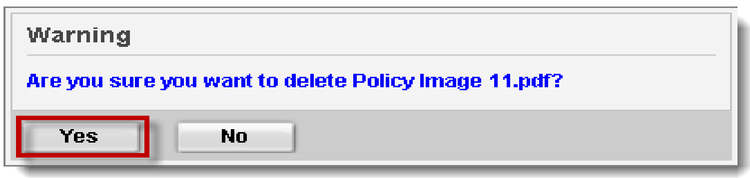
View Policy Images

Once you have located the policy you were looking for, you may view it by clicking on **View** in the Action Column at the right side of the page.

Delete Policy Images

1. Once you have located the policy you wish to delete, click **Delete** in the Action Column at the right side of the page

2. Click **Yes** to confirm



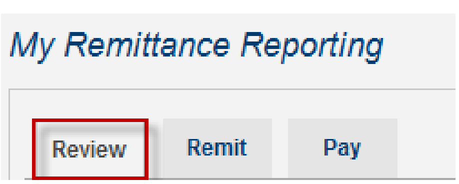
NOTE: If you have clicked on Delete in error, select **No**.

My Remittance Reporting

Access

Click on the My Remittance Reporting icon on the AgentNet home page

NOTE: In the **My Remittance Reporting** section, you are defaulted to the **Review** tab. The other tabs available are **Remit** and **Pay**.



View Invoice and File Information

Search for Data

Every tab in the **My Remittance Reporting** section offers the ability to search for specific data within that section.

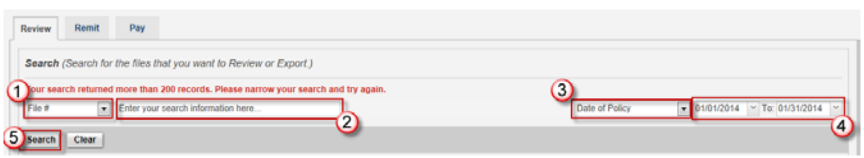
1. Select search option from the dropdown menu
   NOTE: The options in the dropdown menu vary depending on the tab.

2. Enter search criteria in the field to the right

3. Select which Date Range you wish to search. You may choose from the following:
   a. Date of Policy
   b. Policy Compliance Date

4. Select a date range to search from the dropdown menus on the far right
   NOTE: You can search an open start date by leaving the first date field blank. Equally, you can search an open-end date by leaving the end date blank.

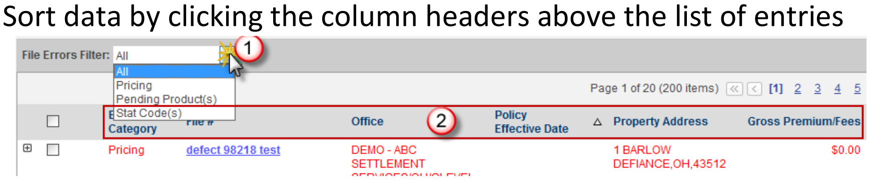
5. Click **Search**



Filtering and Sorting Data

1. Filter data by selecting from the dropdown menu

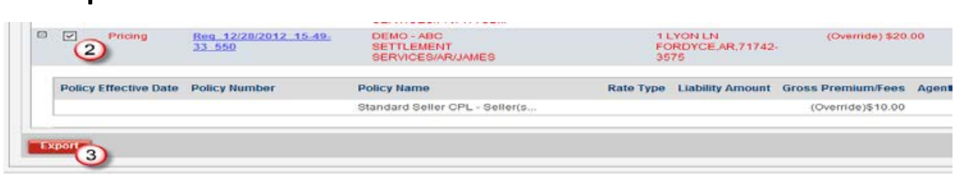
2. Sort data by clicking the column headers above the list of entries



Expanding Data

1. Click ⊞ to view file detail

2. Click the **Checkbox** to the left of the file(s) to be paid
3. Click **Export**



Tabs

Review

The **Review** tab in **My Remittance Reporting** displays all files with errors in an “Open” status (not yet paid). Use the **Review** tab to address any potential remittance errors for any files you wish to remit to First American. The errors must be cleared before the file can be selected for payment.

1. Click file number for the file you wish to correct
   NOTE: You will be taken to the **Error** tab for that file displaying the specific error that is prohibiting your file from being remitted.

2. Address the error indicated on the **Error** tab
   NOTE: Once the error is corrected the file will be moved to the **Remit** tab where it can be selected for payment and will no longer appear on the **Review** tab.

Remit

The **Remit** tab in **My Remittance Reporting** displays all files with an “Open” status, no remittance errors and is available to remit to First American.

NOTE: The premiums reported will also include Closing Protection Letter and Endorsement premiums calculated in the Rates and fees tab, if any.

1. Check the ☑ next to each file you wish to submit
   NOTE: You may select more than one at a time

2. Files with a 📍 to the left are withheld from **Auto-Reporting**
   NOTE: Navigate to the **Auto-Reporting** section for more information

3. When finished selecting files, you may either:
   a. Click **Export** to generate an Excel spreadsheet of all of the files selected
   b. Click **Remit** to begin remittance on the currently selected files (25 files or less)
   NOTE: Proceed to step 5.

   c. Click **Queue** to send your selected files into a “queue” for remittance
   NOTE: Continue to add files into your remittance queue until you are ready to remit all of the files you have added. There is a Maximum of 2500 files allowed in the Remittance Queue.

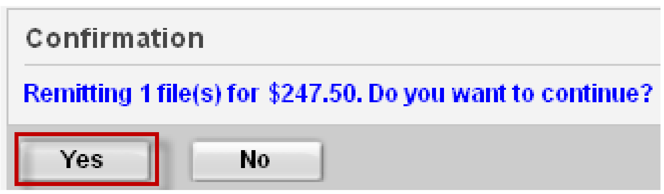
4. Click the **Open Remit Queue** hyperlink
   NOTE: You have the export option from here as well.

5. Click either
   a. **Remove** to remove any selected files from the Remittance Queue
   b. **Remit** to remit all files in the queue. If remitting 25 files or less, proceed to step 6

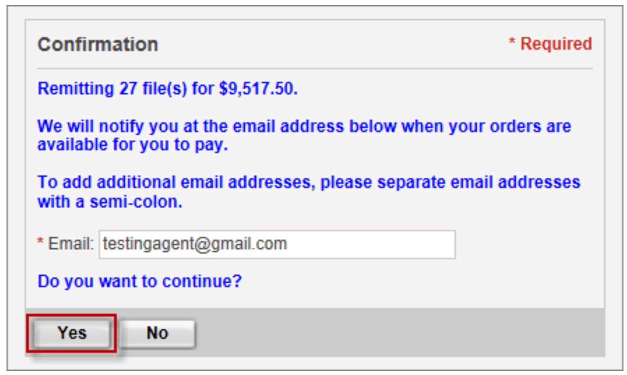
6. Enter the email address you wish to be notified at when your orders are available to pay
   NOTE: You may add additional email addresses by separating them with a semi-colon

7. Click **Yes** to confirm files to remit and proceed to **Pay** tab

Remit less than 25



Remit more than 25 files



Pay

The **Pay** tab in **My Remittance Reporting** includes all outstanding invoices that are ready for payment. Invoices may be paid from this tab or from the **My Invoices/Statement** tab.

1. **Invoices in Process** - not processed and awaiting an invoice number
2. **Open** - have not been paid
3. **ePay in Process** - recently processed Electronic Payment (**ePay**)
4. **Manual Pay in Process** - recently submitted a remittance control sheet

Order #	Invoice #	Invoice Date	Status	Gross Premium/Fees	Net Premium/Fees	Payments/Credits	Amount Due
496862	Invoice in Process	05/19/2011	Manual Pay in Process	$1,151.50	$345.45	$0.00	$345.45
606398	Invoice in Process	01/10/2011	Open	$90.00	$30.00	$0.00	$30.00
606399	30277427	05/09/2011	ePay in Process	$50.00	$15.00	$0.00	$15.00
606400	30277421	05/10/2011	ePay in Process	$420.00	$63.00	$0.00	$63.00
606401	Invoice in Process	03/03/2011	Open	$100.00	$30.00	$0.00	$30.00
606402	30277422	05/10/2011	Manual Pay in Process	$220.00	$66.00	$0.00	$66.00
606408	30277431	05/10/2011	Manual Pay in Process	$2,638.75	$395.81	$0.00	$395.81

NOTE: Cancelled **ePays** prior to payment will still show as "**ePay in Process**" and will be grayed out. Block will be lifted in 24 hours once system sees no payment was made.

ePay an Invoice

Using **ePay** is considered to be an Automated Clearing House (ACH) transaction and you should refer to the trust accounting rules in your area for specifics on the actual process. If you have any questions, please contact your local First American representative.

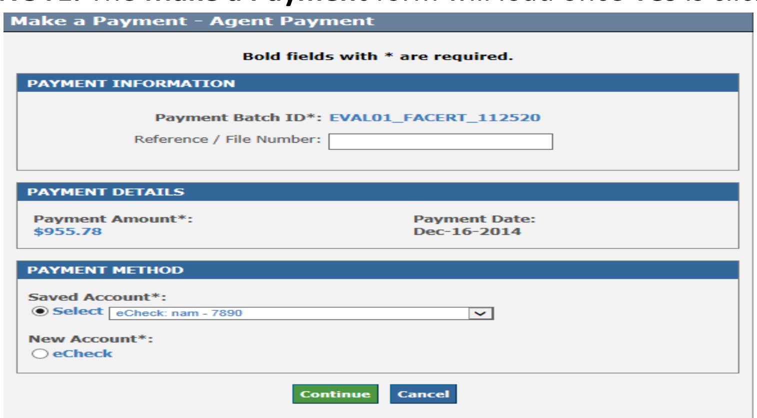
To make an electronic payment (**ePay**) for an invoice:

1. Check the ☑ to the left of the invoice(s) you would like to pay
   NOTE: You may pay multiple invoices at one time.

2. Click ePay

3. Click **Yes** to continue to **ePay** window or **No** to cancel the **ePay** transaction

NOTE: The **Make a Payment** form will load once **Yes** is clicked in the previous step.

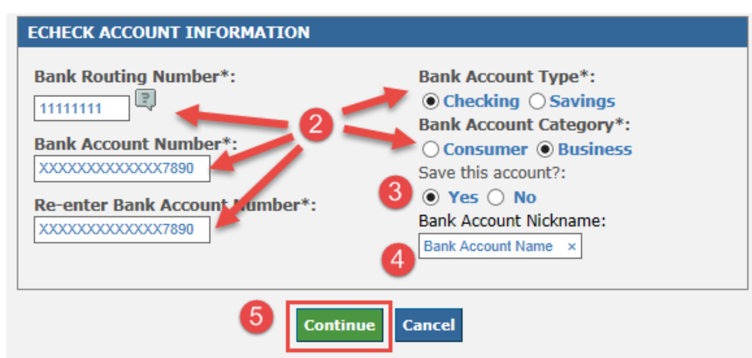


Set Up Chase eCheck Account

If you already have a Chase eCheck account established, proceed to **Pay with an Existing Chase eCheck Account** below.

1. Click the **New Account** radio button next to eCheck
   NOTE: New fields open below to enter bank account information

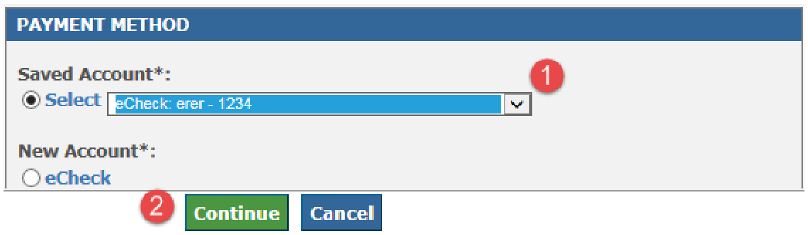
2. Complete the **Account Information** fields
3. Click **Yes** to save the account
4. Enter account **Nickname**
5. Click **Continue**



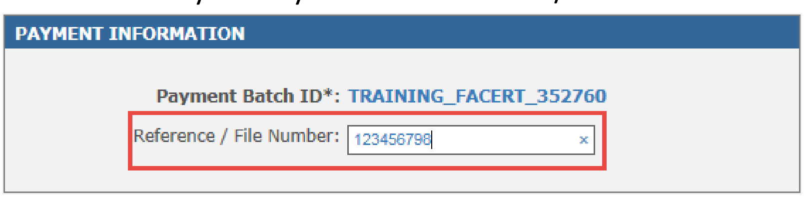
NOTE: Pay Connexion℠ is the system used to process Chase eChecks. Browsers must be TLS v1.2 enabled to access the Pay Connexion system. Chrome™, Firefox®, Internet Explorer®, and Safari® support the TLS v1.2 encryption protocol. Clients should confirm their browser security settings.

Pay with an Existing Chase eCheck Account

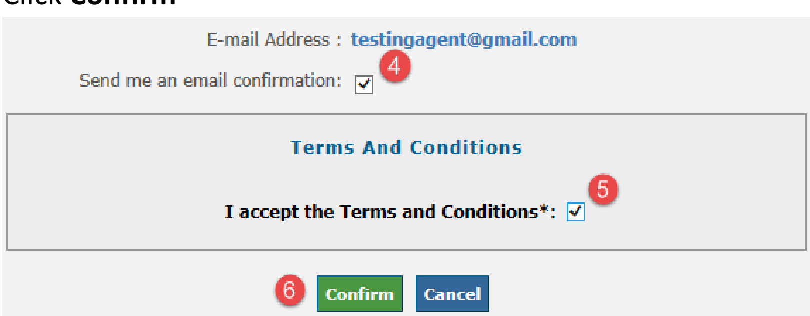
1. Select the appropriate account from the **Saved Account** dropdown menu
2. Click **Continue**



NOTE: You may enter your own Reference/File Number for easier tracking and later reference.



3. Verify your payment information
4. Click the **Send me an email confirmation** checkbox
5. Click the checkbox to accept the **Terms and Conditions**
6. Click **Confirm**



NOTE: Payments made within 7 days of one another generate a "Duplicate Payment Warning." Remember – this is only a warning. You will not be restricted from making payments at any time.

Vendor ID for ACH transactions

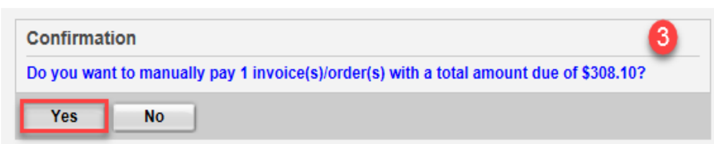
If you have established an Automated Clearing House (ACH) debit block to your bank account, you will need to provide to your financial institution the appropriate First American Underwriter name and ACH Vendor ID so your debit requests can be processed. If your bank requires this, provide the most appropriate ACH Vendor ID for the appropriate underwriter from the list below:

ACH Vendor ID	Underwriter
9289310001	First American Title Insurance Company (FATIC)
9007629001	First American of Louisiana (FALA)
9124549001	Ohio Bar (OBTIC)
9580663001	First American Guaranty (FATGC)

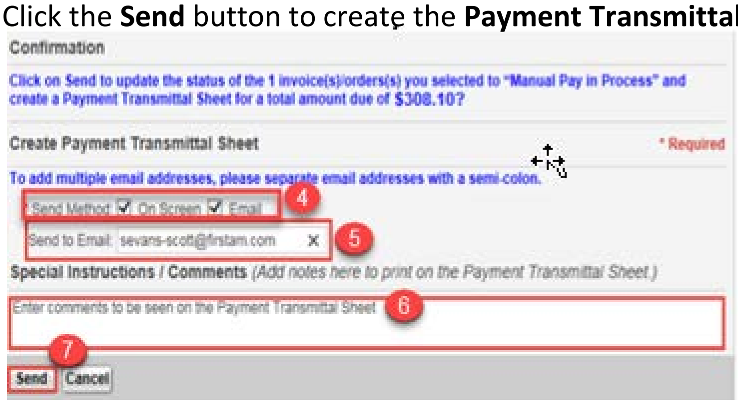
Manual Pay an Invoice

To make a manual payment on an invoice:

1. Check the ☑ to the left of the invoice(s) you would like to pay
   NOTE: You may pay multiple invoices at one time.
2. Click Manual Pay
3. Click **Yes** to continue to Manual Payment Window

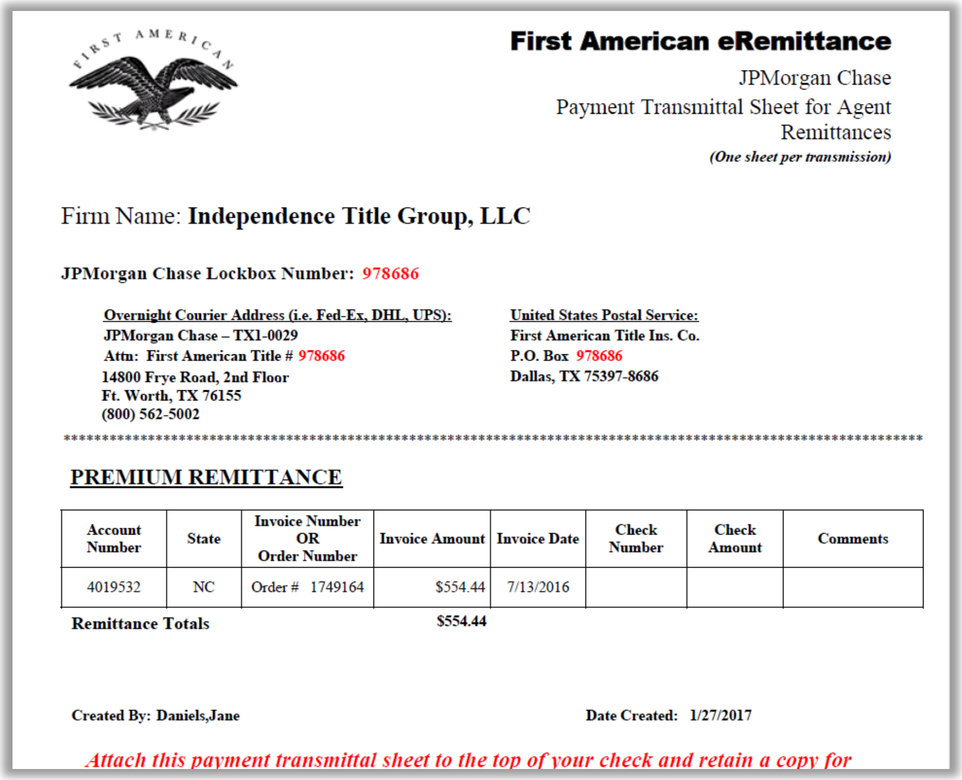


4. Click the ☑ next to any or all of the Send Method options you wish to use
5. If selecting to **Email** the **Payment Transmittal Sheet**, enter the desired email address in the **Send to Email** section provided
6. Insert any **Special Instructions/Comments** in the text box to show on the **Payment Transmittal Sheet**
7. Click the **Send** button to create the **Payment Transmittal Sheet** and execute all send methods selected



NOTE: If the **On Screen** send method is selected, a new window appears with a PDF image of the generated **Payment Transmittal Sheet**. You may print the sheet or save to your workstation.

NOTE: Click **Cancel** to cancel creating the **Payment Transmittal Sheet** without making a payment.



First American eRemittance

JPMorgan Chase
Payment Transmittal Sheet for Agent Remittances
(One sheet per transmission)

Firm Name: **Independence Title Group, LLC**

JPMorgan Chase Lockbox Number: 978686

Overnight Courier Address (i.e. Fed-Ex, DHL, UPS):
JPMorgan Chase – TX1-0029
Attn: First American Title # 978686
14800 Frye Road, 2nd Floor
Ft. Worth, TX 76155
(800) 562-5002

United States Postal Service:
First American Title Ins. Co.
P.O. Box 978686
Dallas, TX 75397-8686

****

PREMIUM REMITTANCE

Account Number	State	Invoice Number OR Order Number	Invoice Amount	Invoice Date	Check Number	Check Amount	Comments
4019532	NC	Order # 1749164	$554.44	7/13/2016			

Remittance Totals **$554.44**

Created By: Daniels,Jane **Date Created: 1/27/2017**

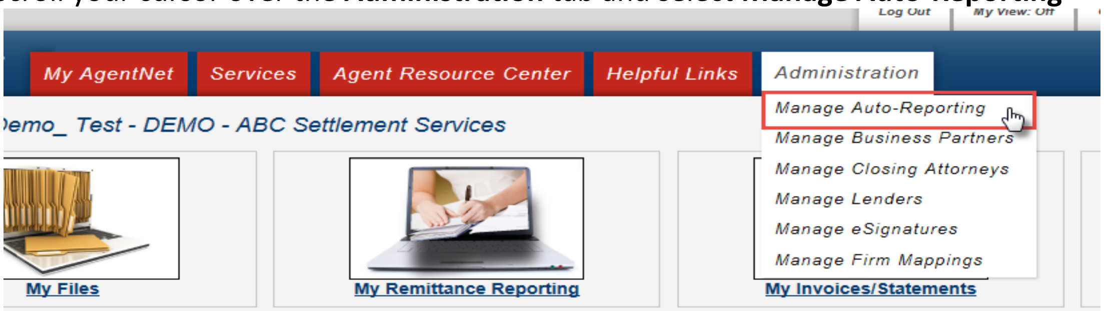
Attach this payment transmittal sheet to the top of your check and retain a copy for

NOTE: If selecting to Manual Pay on AgentNet, all payments will be sent to a newly assigned lockbox, which may differ from your current lockbox location. Please include a copy of the pre-populated **Payment Transmittal Sheet** from AgentNet with your payment.

Auto-Reporting

To expedite the remittance process, you can also set your AgentNet account to "Auto Report" policies and premiums to First American on files that contain no remittance errors. Follow the steps below to set up Auto-Reporting in AgentNet.

1. Scroll your cursor over the **Administration** tab and select **Manage Auto-Reporting**

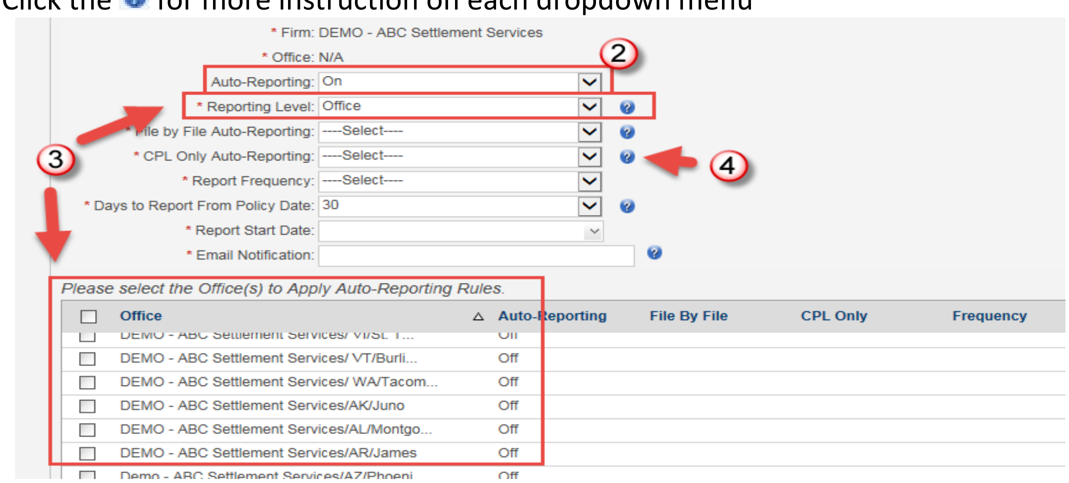


NOTE: The Auto-Reporting page has a series of dropdown menus for you to designate your preferences. The top two spaces indicate the Firm and offices that will be included in the reporting.

2. Select "On" in the **Auto-Reporting** dropdown menu
   NOTE: By utilizing the Auto-Reporting feature you are electing to automatically report files to First American's accounting department. Only files that have been priced and have no file errors will be eligible for Auto-Reporting. These settings apply to the entire Firm/Agency setup, unless specified otherwise at the Office level.

3. Select whether you want the **Reporting Level** set at the "Firm" or "Office" level
   NOTE: If selecting "Office" check the boxes below for each office to apply the reporting settings.

4. Click the ? for more instruction on each dropdown menu

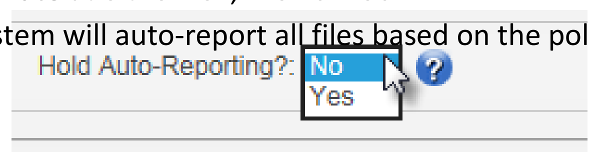


5. Select "Yes" or "No" for **File by File Auto-Reporting**
   NOTE: Selecting "Yes" indicates you want the system to generate a separate order for each file.

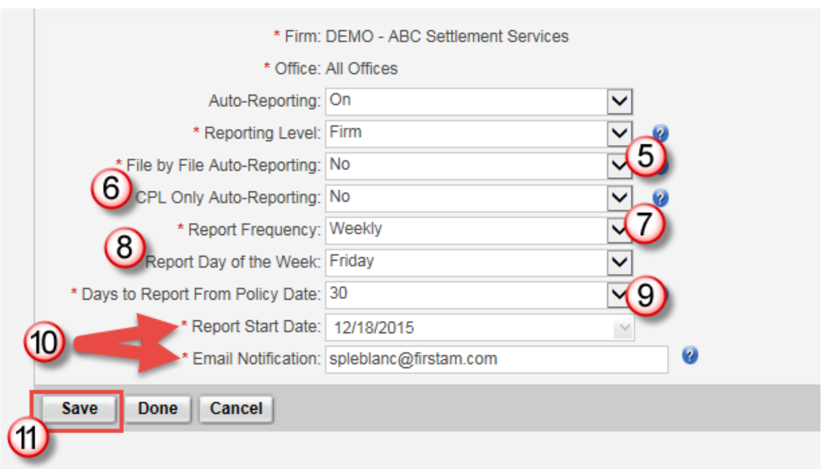
6. If you only want to Auto-Report files that contain only a priced CPL and no policies select “Yes” for **CPL Only Auto-Reporting**. Otherwise select “No”

7. Select your preferred **Report Frequency**
   a. Daily
   b. Weekly
   c. Bi-Monthly (15th and 25th of each month)
   d. Monthly (25th of each month)

8. If you select “Weekly” you must designate the day of the week to report in the menu that appears
9. Select the **Days to Report From Policy Date** at either “5”, “15” or “30”
   NOTE: Based on your selection, the system will auto-report all files based on the policy date with no remittance validation errors.



10. Confirm your **Report Start Date** and the address for **Email Notification** are correct
11. Click **Save**



Withhold from Auto-Reporting
You can withhold a file from Auto-Reporting by navigating to the Rates and Fees tab for that particular file and select the appropriate option from the dropdown menu.

Next Steps

In applicable areas where submitting policy schedules to First American is required in the remittance process, the next step is to use the Policy Upload tool in AgentNet® to upload policy documents such as schedules and endorsements which have already been reported or are in the process of being reported through AgentNet®. Refer to the *Job Aid – My Policy Upload* for step-by-step instructions on how to use this feature.

NOTE: Submitting policies on the upload tool does not send them to accounting for remittance purposes.

View Tab

The **My View** tab is available for Firms with multiple offices and/or is located in more than one state, to customize the offices they have access to in their account.

Set up My View

NOTE: When you create a new file, this will be the offices you can select from (refer to job aid entitled **Create New File** in User Guides tab).

1. Click the My View tab, located among the top row of tabs on the AgentNet home page

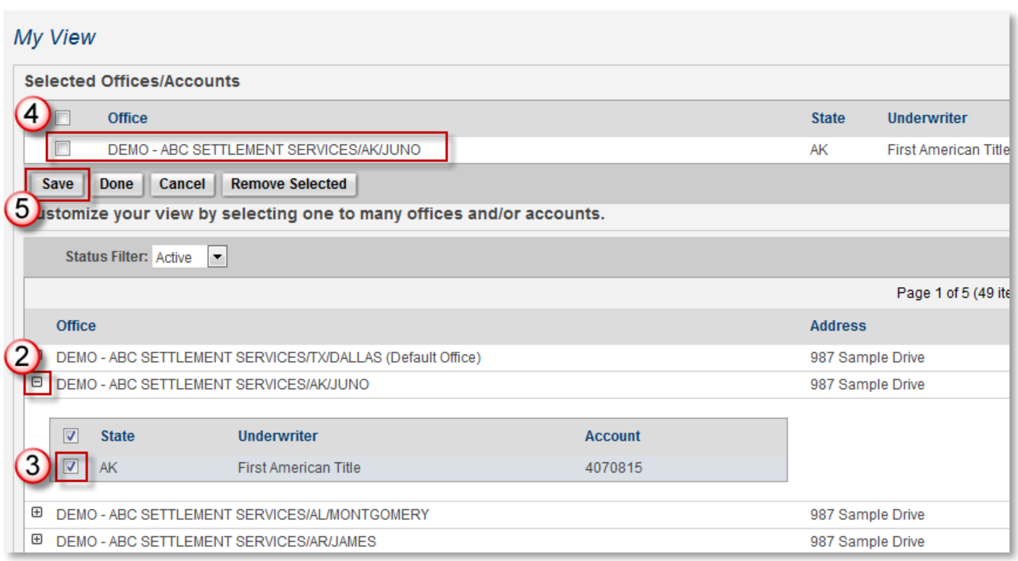
2. From the list of offices, click the ⊞ to the left of the office you would like to have access to

   NOTE: You will only be able to view offices that are attributed to your firm with First American.

3. Check the ☑ to the left of the office you would like access to
4. The office you selected will be inserted under **Selected Offices/Accounts**

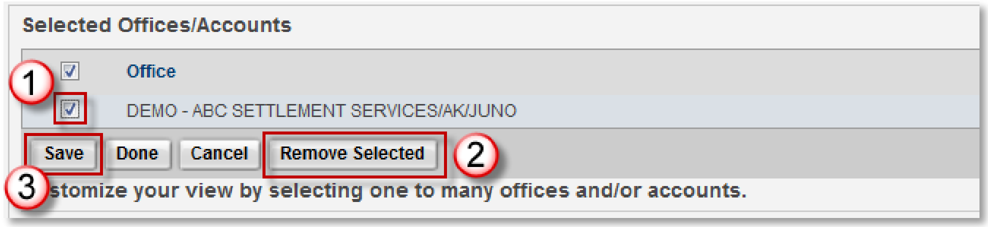
   NOTE: You may repeat steps 2-4 as many times as needed.

5. Click Save



Edit My View

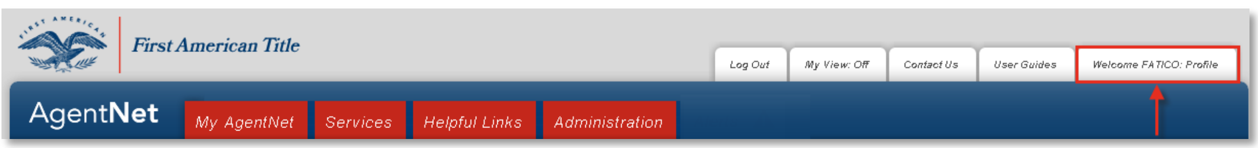
1. Check the ☑ next to the offices you would like removed from **Selected Offices/Accounts**
2. Click **Remove Selected**
3. Click **Save**



Profile Security

Access

From the home page, click Welcome User Profile tab



Contact Information

Complete or edit the fields under **Contact Information**, as needed.

NOTE: Red asterisks denote required fields.

Office Information

Select your office location from dropdown menu under **Office Information**.

NOTE: This selection will serve as your "Default" office when creating new files.

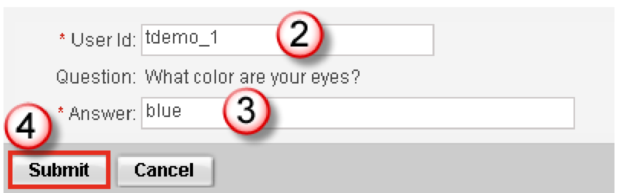
Password Information

My Password Questions

1. Select 4 questions from the **Question 1-4** dropdown menus
2. Enter answers in **Answer 1-4** fields for future password retrieval
3. Click **Save**

Forgot Password

1. From the login screen click Forgot Password
2. Enter your **User Id**
3. Enter the **Answer** to the Question
4. Click **Submit**

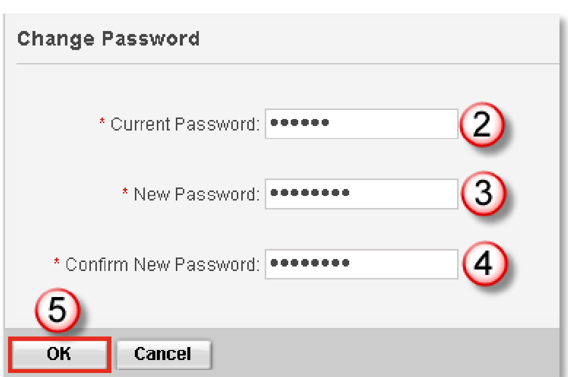


NOTE: a temporary password will be emailed to you.

Change Password

1. Click Change Password at the bottom of the Profile page
2. Enter **Current Password**
3. Enter **New Password**
   NOTE: Passwords cannot contain spaces or any of the following characters: ^, |, “, ~, >, <, !, -

4. **Confirm New Password**
5. Click **OK**

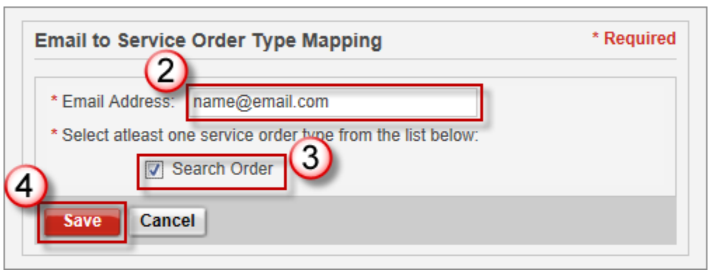


NOTE: Strong passwords should be at least 8 characters and contain a combination of uppercase letters, lowercase letters, numbers, and special characters. Passwords expire after 365 days. For security reasons, you may not reuse a password you have used in your last 4 password change cycles.

Service Provider Email Notifications

Follow the steps below to designate the email addresses you prefer to receive notifications for specific functions in AgentNet.

1. Click Add under the **Service Provider Email Notifications** section
2. Enter the email address you wish to receive notifications to in the space provided
3. Check next to the service order type you wish to receive notifications for
4. Click **Save**

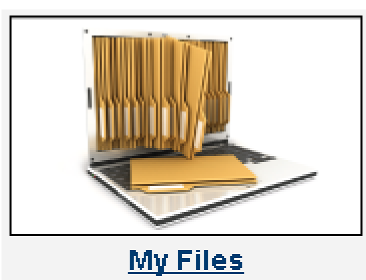


Rates & Fees

Access

Follow the steps below to quickly access your file in AgentNet.

1. From the home page, click the **My Files** icon

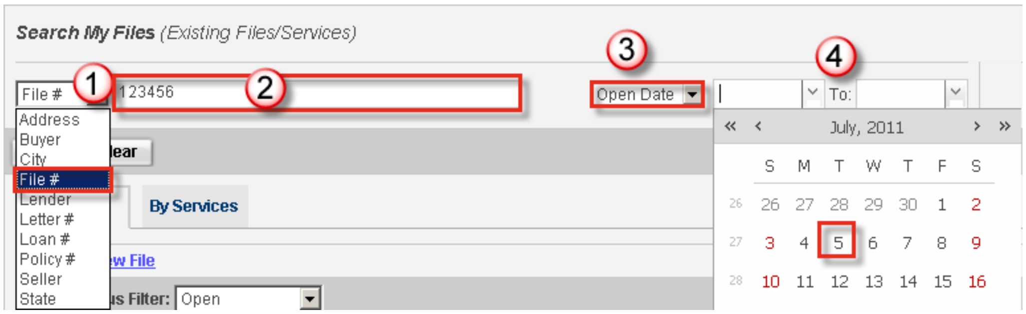


From the **My Files** screen select:

2. **By Files** to search for existing files associated with your account
   OR
3. **By Services** to select a specific service and identify files that have that service created
   OR
4. **By Shared Files**

Search for a File

1. Select your preferred **search parameter** from the dropdown menu
2. Enter the specific **criteria** to locate your file
3. Select either **Open Date** or **Close Date**
4. Select the **specific dates** for your query from the two dropdown menus
5. Click Search



View By Files

1. From the By Files tab click ⊞ to the left of the file number to expand the file's information
   a. If Rates & Fees appears in the list of services for your file, click on this hyperlink to view the information
   OR
   b. Click [Create New Service] to generate Rates & Fees for the file

View By Services

1. From the By Services tab click ⊞ to the left of Rates & Fees to display a list of files with Rates & Fees attached
   a. Click on the **File #** to open that file
   OR
   b. If an **existing file** does not appear, click By Files tab to locate the file and create a new file
   OR
   c. Click [Create New] to create a **new file** with Rates & Fees attached

View By Shared Files

1. From the By Shared Files tab click ⊞ to the left of the file number to expand the file's information.

   a. If Rates & Fees appears in the list of services for that file, click on this hyperlink to view the information
   OR
   b. Click [Create New Service] to create back title for the file

NOTE: A will your firm can discontinue sharing it. A will appear next to the file number if this file is being shared with your firm by a partner firm. Only the partner firm can discontinue sharing.

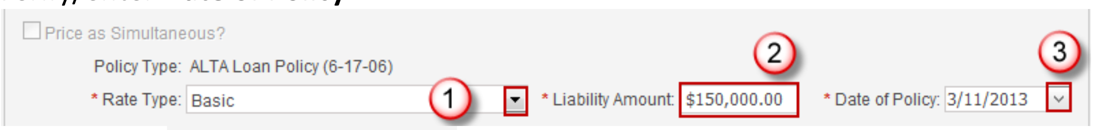
Enter Calculation Criteria

Follow the steps below to calculate Rates and Fees in AgentNet. Begin in the Rates and Fees tab within a specific file.

Rate Type

1. Select **Rate Type** from dropdown menu
 NOTE: The Rate types listed in dropdown menu will vary by state.

2. Verify/enter **Liability Amount**
3. Verify/enter **Date of Policy**

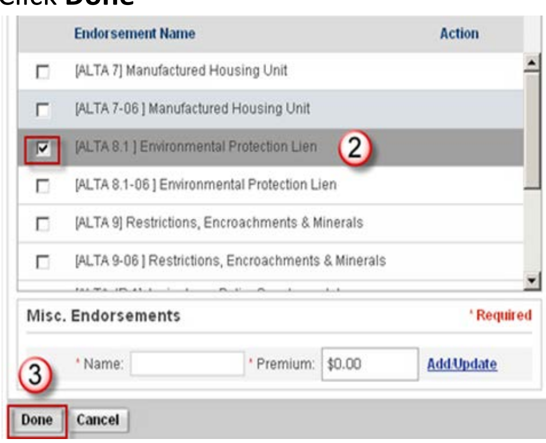


NOTE: if the ☑ Price as Simultaneous? checkbox is marked, the policy you are viewing will be priced as a simultaneous issue policy.

Standard Endorsements

1. Click Add/Remove Endorsements
2. Select all applicable standard endorsements by clicking the checkbox to the left of Endorsement Name
   NOTE: The Endorsement types listed in dropdown menu will vary by state.
   NOTE: Selecting Endorsements is for pricing purposes only. Please use your current procedure for creating endorsements.

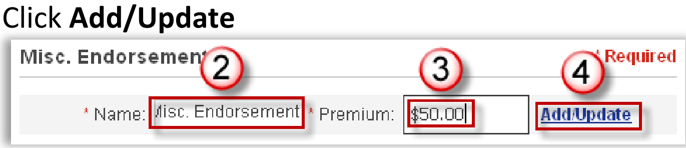
3. Click **Done**



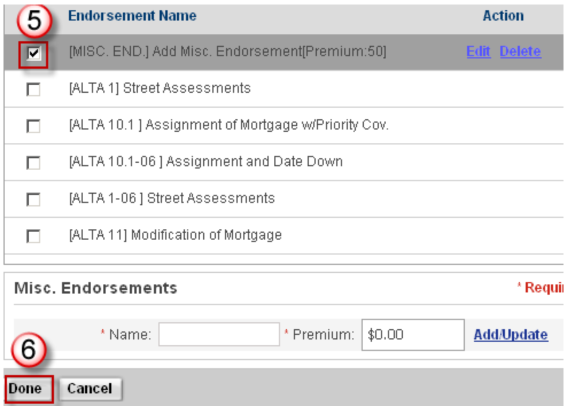
NOTE: Repeat above steps for each policy

Misc. Endorsement

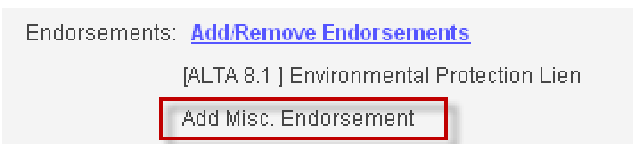
1. Click Add/Remove Endorsements
2. Type endorsement name in the **Name** field
3. Type premium amount in **Premium** field
4. Click **Add/Update**



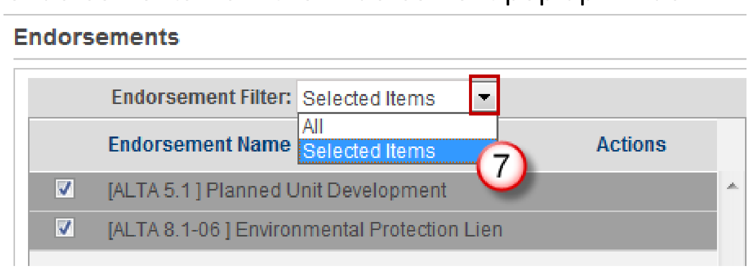
5. Select your endorsement from the list
6. Click **Done**



NOTE: Selected Endorsement(s) now appear under "Endorsements" heading.



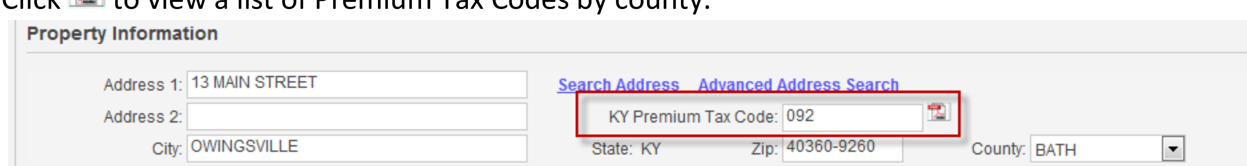
7. From the **Endorsement Filter** drop down, select Selected Items, to narrow your search when Adding/Removing endorsements from the Endorsement pop up window



KY Premium Tax Codes – Information Only

Use **Premium Tax Codes** to calculate Kentucky Premium Tax. The applicable county tax code is auto-populated and will be visible in the **Property Information** section, after you click Calculate

1. Click to view a list of Premium Tax Codes by county.



Calculate

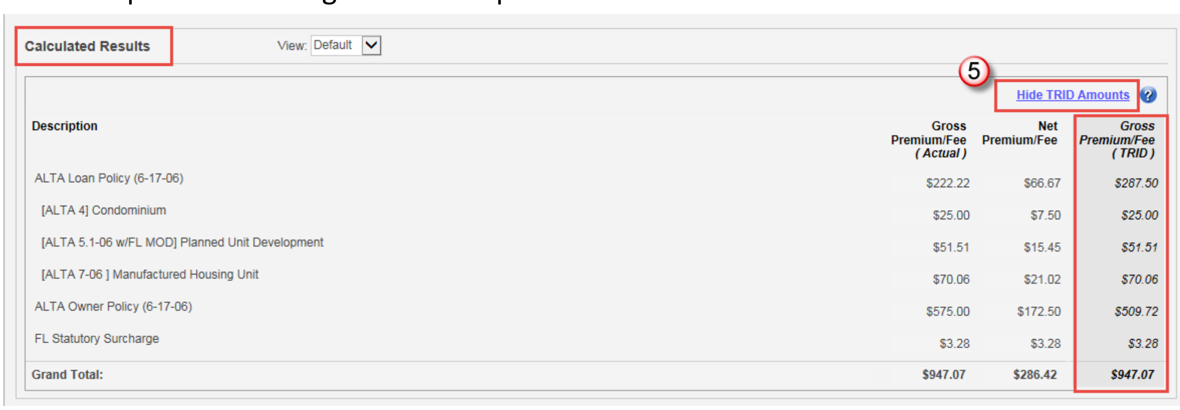
Follow the steps below to calculate rates:

1. You may select a **Rate Effective Date** (Optional)
   NOTE: This will enable you to predate the policy and also calculate premiums on policies with different effective dates.

2. Click Calculate Rates may appear; or, you may have to answer additional questions
3. Complete Additional Questions (when applicable) by selecting **Type of Property** in dropdown menu

4. Click Calculate again
   NOTE: Rates & Fees can now be viewed in Calculated Results area.

5. Results will appear in three columns. Gross Premium/Fee (Actual), Net Premium/Fee and Gross Premium/Fee (TRID)
   NOTE: Click Hide TRID Amounts to just display only actual premiums. Click Show TRID Amounts to display disclosed premiums along with actual premiums

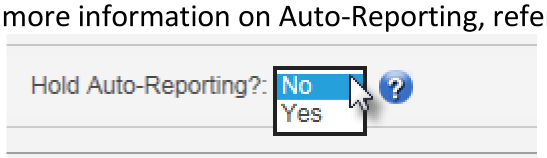


Description	Gross Premium/Fee (Actual)	Net Premium/Fee	Gross Premium/Fee (TRID)
ALTA Loan Policy (6-17-06)	$222.22	$66.67	$287.50
[ALTA 4] Condominium	$25.00	$7.50	$25.00
[ALTA 5.1-06 w/FL MOD] Planned Unit Development	$51.51	$15.45	$51.51
[ALTA 7-06] Manufactured Housing Unit	$70.06	$21.02	$70.06
ALTA Owner Policy (6-17-06)	$575.00	$172.50	$509.72
FL Statutory Surcharge	$3.28	$3.28	$3.28
Grand Total:	$947.07	$286.42	$947.07

6. Select Save

Auto-Reporting

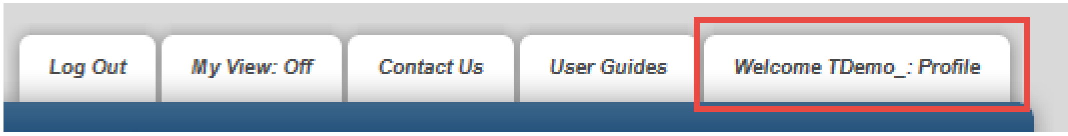
You can choose to withhold the file from automatically reporting from a drop down menu in Rates and Fees. For more information on Auto-Reporting, refer to the job aid entitled "My Remittance Reporting".



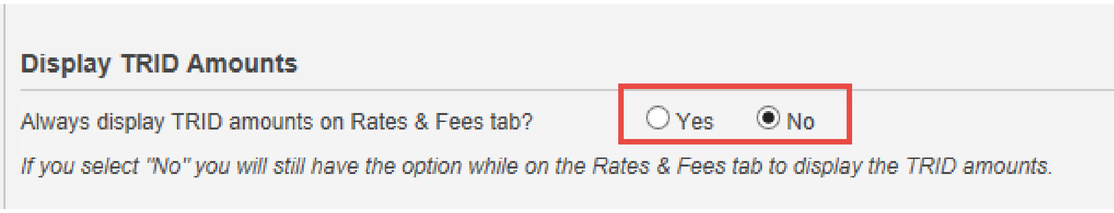
Set TRID Defaults

Follow the steps below to change your default settings for displaying TRID amounts in Rates and Fees.

1. Click the “Welcome” tab in the top right corner of the page



2. Under “Display TRID Amounts” select Yes or No to set the default to display the TRID disclosed premiums



Remit, Queue, Remit and ePay, and Remit and Manual Pay

Additional buttons may be available next to the Calculate button depending on your user activity rights and the condition of your file.

Remit

You may follow the following steps to remit the file:

1. Click **Remit**

2. Click **Yes**
3. File is sent to **Pay** tab creating an order for payment when ready

Queue

You may follow the following steps to place file into the Remit **Queue** the file:

1. Click **Queue**

2. File is added to the Remit **Queue** without having to go to **My Remittance Reporting** ready to be manually remitted.

Remit & ePay

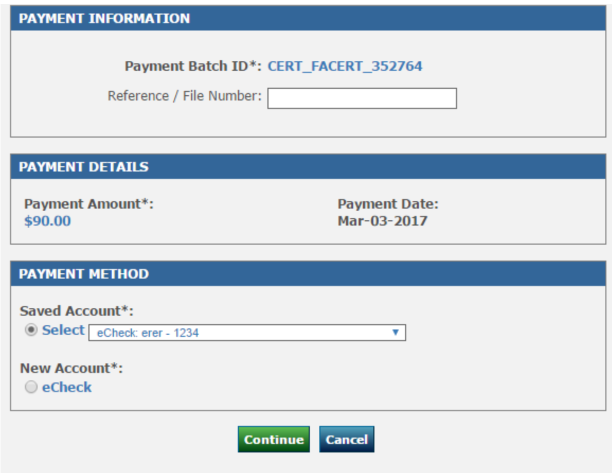
You may take the following steps to **Remit & ePay** the file:

1. Click **Remit & ePay**
2. Click **Yes** to confirm changes
3. Click **Yes** to confirm remitting of file
   NOTE: The Make a Payment form will load. Yes is clicked in the previous step.

Set up Chase eCheck Account

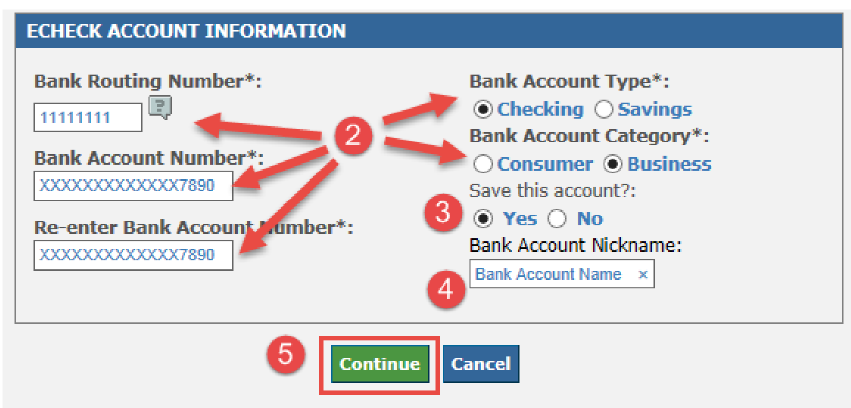
You may set up a new Chase eCheck account.

Note: If you already have a Chase eCheck account established, proceed to **Pay with an Existing Chase eCheck Account** below.



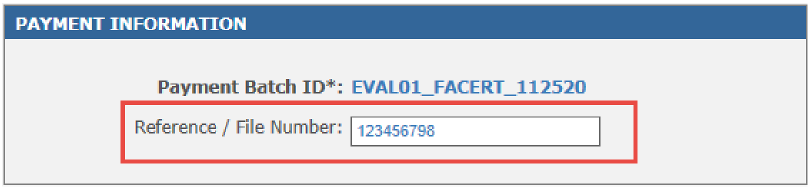
1. Click the **New Account** radio button next to eCheck
   NOTE: New fields open below to enter bank account information.

2. Complete the **Account Information** fields
3. Click **Yes** to save the account
4. Enter account **Nickname**
5. Click **Continue**



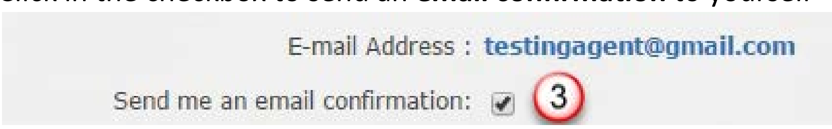
Pay with an Existing Chase eCheck Account

1. Select the appropriate account from the **Saved Account** dropdown menu
   NOTE: You may enter your own Reference/File Number for easier tracking and later reference



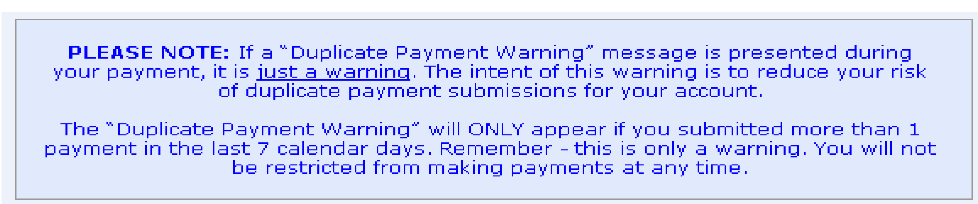
2. Click **Continue**

3. Click in the checkbox to send an **email confirmation** to yourself



4. Click the checkbox to accept the **Terms and Conditions**
5. Click **Confirm**

NOTE: Payments made within 7 days of one another generate a "Duplicate Payment Warning." Remember – this is only a warning. You will not be restricted from making payments at any time.



PLEASE NOTE: If a "Duplicate Payment Warning" message is presented during your payment, it is just a warning. The intent of this warning is to reduce your risk of duplicate payment submissions for your account.

The "Duplicate Payment Warning" will ONLY appear if you submitted more than 1 payment in the last 7 calendar days. Remember - this is only a warning. You will not be restricted from making payments at any time.

Vendor ID for ACH transactions

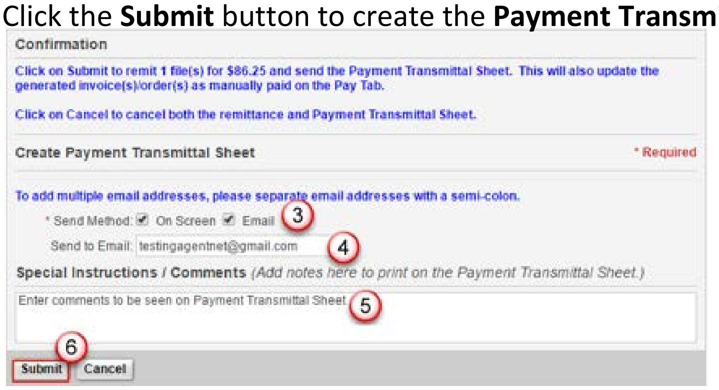
If you have established an Automated Clearing House (ACH) debit block to your bank account, you will need to provide to your financial institution the appropriate First American Underwriter name and ACH Vendor ID so your debit requests can be processed. If your bank requires this, provide the most appropriate ACH Vendor ID for the appropriate underwriter from the list below:

ACH Vendor ID	Underwriter
9289310001	First American Title Insurance Company (FATIC)
9007629001	First American of Louisiana (FALA)
9124549001	Ohio Bar (OBTIC)
9580663001	First American Guaranty (FATGC)

Remit & Manual Pay

You may take the following steps to **Remit & Manually Pay** the file:

1. Click **Remit & Manual Pay**
2. Click **Yes** to changes
3. Click the next to any or all of the Send Method options you wish to use
4. If selecting to **Email** the **Payment Transmittal Sheet**, enter the desired email address(s) in the **Send to Email** section provided
5. Insert any **Special Instructions/Comments** in the text box to show on the **Payment Transmittal Sheet**.
6. Click the **Submit** button to create the **Payment Transmittal Sheet** and execute all send methods selected



NOTE: Click **Cancel** to cancel creating the **Payment Transmittal Sheet.**

7. If the **On Screen** send method was selected, a new window appears with a PDF image of the generated **Payment Transmittal Sheet**. You may print the sheet or save to your workstation.

First American eRemittance

JPMorgan Chase
Payment Transmittal Sheet for Agent Remittances
(One sheet per transmission)

Firm Name: **Independence Title Group, LLC**

JPMorgan Chase Lockbox Number: 978686

Overnight Courier Address (i.e. Fed-Ex, DHL, UPS):
JPMorgan Chase – TX1-0029
Attn: First American Title # 978686
14800 Frye Road, 2nd Floor
Ft. Worth, TX 76155
(800) 562-5002

United States Postal Service:
First American Title Ins. Co.
P.O. Box 978686
Dallas, TX 75397-8686

PREMIUM REMITTANCE

Account Number	State	Invoice Number OR Order Number	Invoice Amount	Invoice Date	Check Number	Check Amount	Comments
4019532	NC	Order # 1749164	$554.44	7/13/2016			

Remittance Total: $554.44

NOTE: If selecting to Manual Pay on AgentNet, all payments are sent to a newly assigned lockbox, which may differ from your current lockbox location. Please include a copy of the pre-populated **Payment Transmittal Sheet** from AgentNet with your payment.

File Summary

To print/preview the File Summary:

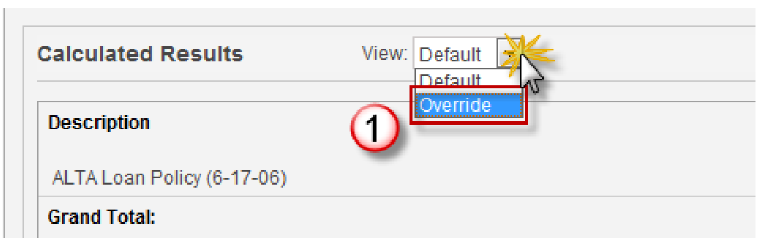
1. Click  on File Services page or  on My Files page to access print/preview screen
2. Click  icon to print or  icon to save to your computer

Override

The Override feature in Rates and Fees is an option in AgentNet for special circumstances required to change a fee or premium.

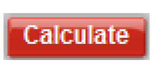
NOTE: Currently the states of IL, WI and IN must use this override feature. IN, IL and WI should automatically default to the Override view. While this feature will always be available, as rates and fees are added to AgentNet, in the future it may not be required for those particular areas.

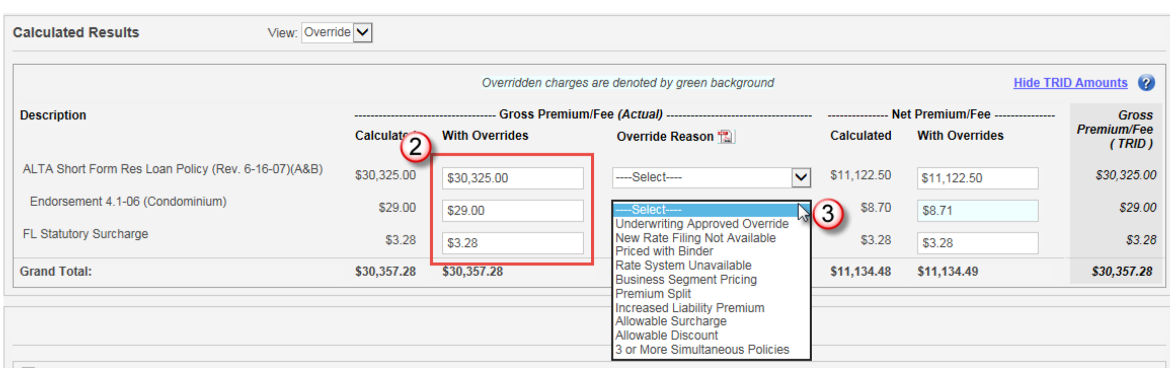
1. Select **Override** from the View dropdown menu



2. Enter new premium in the space provided under **Override Amount**
3. Select the **Override Reason** from the dropdown menu provided

   NOTE: A list of available Override Reasons and their definitions may be found below in the Override Reasons section.

4. Click the  button



Override Reasons

Override Reason	Description
Underwriting Approved Override	Available to use after receiving approval on an Underwriting Request from a First American Underwriter
New Rate Filing Not Available	Should be used if a new rate filing is in effect and not reflected in the Rates and Fees tab
Priced with Binder	Should be used if the transaction was previously priced involving Binder pricing and is now being completed.
Rate System Unavailable	Should be used when the Rates and Fees tab is down and unavailable
Business Segment Pricing	Available to use in situations where approved pricing structures exist and are not available in the Rates and Fees tab for Business segments such as Homebuilders, Large Lender Customers, Agents, Negotiated Commercial Transactions, HUD Contract, etc.
Premium Split	Available to use in situations where the calculated premium will only reflect a portion of the premium being retained
Increased Liability Premium	Should be used when the Rates and Fees tab is unable to calculate the premium for liability amounts exceeding 100%
Allowable Surcharge	Available to use in states where surcharges are permitted by law and the Rates and Fees tab is unable to calculate them
Allowable Discount	Available to use in states where discounts are permitted by law and the Rates and Fees tab is unable to calculate them
3 or More Simultaneous Policies	Should be used when 3 or more policies are being issued

Add Endorsement to Closed File

Follow the steps below to add endorsements to a remitted policy with a "Closed" file status. Endorsements to a closed file must be assigned to a policy.

1. From the Rates & Fees tab in a remitted file, click Add/Remove Endorsements for the appropriate policy you wish to add endorsements
2. Click "Yes" to confirm you want to add an endorsement to a Remitted Policy

NOTE: If you clicked "Yes" and then later decide not to add any endorsements, you can manually close the file by changing the file status to "Closed".

3. In the new window, select all applicable endorsements by clicking the checkbox to the left of Endorsement Name or you may add and select a **Misc Endorsement**
   NOTE: Selecting Endorsements is for pricing purposes only. Please use your current procedure for creating endorsements.

4. Click Done
   NOTE: Repeat above steps for each policy.

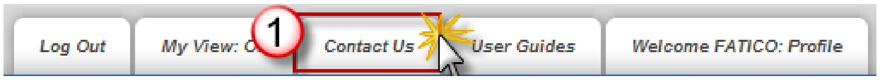
5. When finished adding endorsements to all policies, click Calculate
   NOTE: AgentNet may request additional information, if needed, to calculate premiums on the added endorsements. Features such as **Override** will be available.

   After calculating the premiums on the added endorsements, you may now remit on those endorsements. Please refer to the job aid "My Remittance Reporting" for more information on remitting in AgentNet.

   NOTE: When remitting, the invoice will reference the previous policies that you are adding the endorsements to, but will only charge for the newly added endorsements.

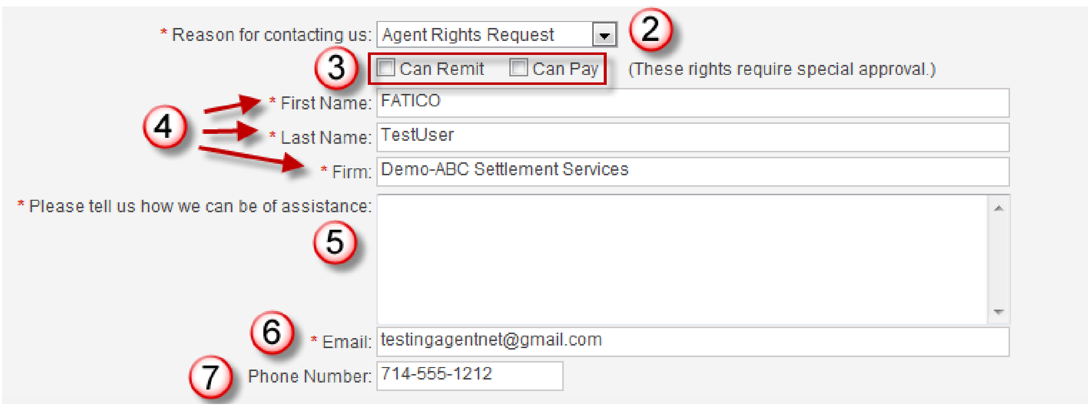
Request Additional User Rights

1. Click **Contact Us**



2. Select **Agent Rights Request** from the dropdown menu
3. If requesting rights to **Remit** policies or **Pay** invoices, check the appropriate boxes
   NOTE: these selections require approval from your company's principal contact.

4. Enter your **First Name**, **Last Name** and **Firm**
5. Enter a brief description of the User Rights you are requesting
6. Enter the **Email** address to send confirmation of your user rights
7. Enter your **Phone Number**



NOTE: fields marked with * are required.

8. Click Submit to send your request to the AgentNet Help Desk.
   NOTES:
   - Click Clear to erase the information entered and start over
     or
   - Click the Cancel button to cancel your request without sending.

NOTE: Requests for user rights (other than **Remit** or **Pay**) are generally completed within 24 hours, but may take longer during high volume periods.

SDN Search

As part of the United States Department of Treasury, the Office of Foreign Assets Control publishes a list of individuals and entities owned, controlled by or acting for, or on behalf of, targeted countries. It also lists individuals, groups, and entities, such as terrorists and narcotics traffickers designated under programs that are not country-specific. Collectively, these individuals and entities are called "Specially Designated Nationals" or "SDNs." Their assets are blocked and U.S. persons are generally prohibited from dealing with them.

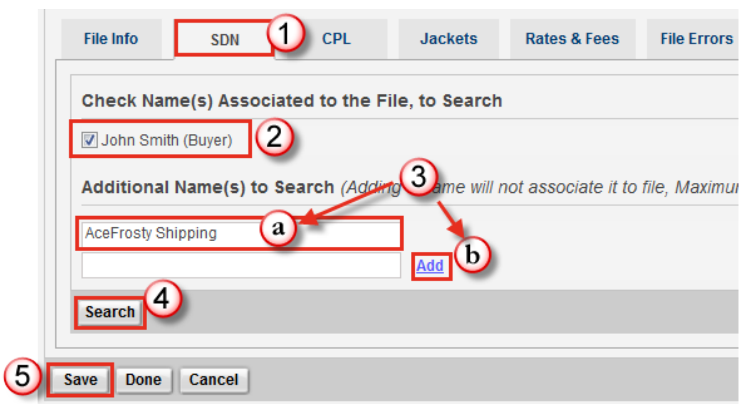
Perform Search

NOTE: This is not a required step but a service you can utilize if needed.

1. Click on the **SDN** tab from within an existing file in the File Services screen
2. Eliminate any unnecessary or names already searched by clicking in the ☑ box next to the name
   NOTE: Individuals or entities entered in the "Party Information" area will automatically be selected.

3. To add additional names
   a. Enter names in the **Additional Name(s) to Search** fields
   b. Click Add

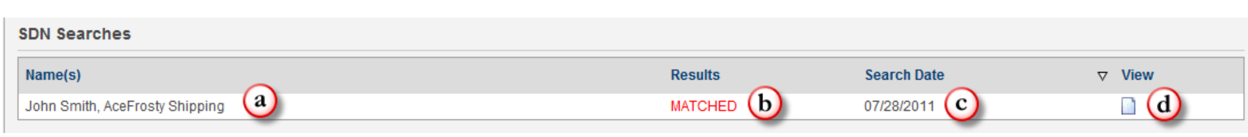
4. Once all names have been entered, click **Search**
5. Click **Save**



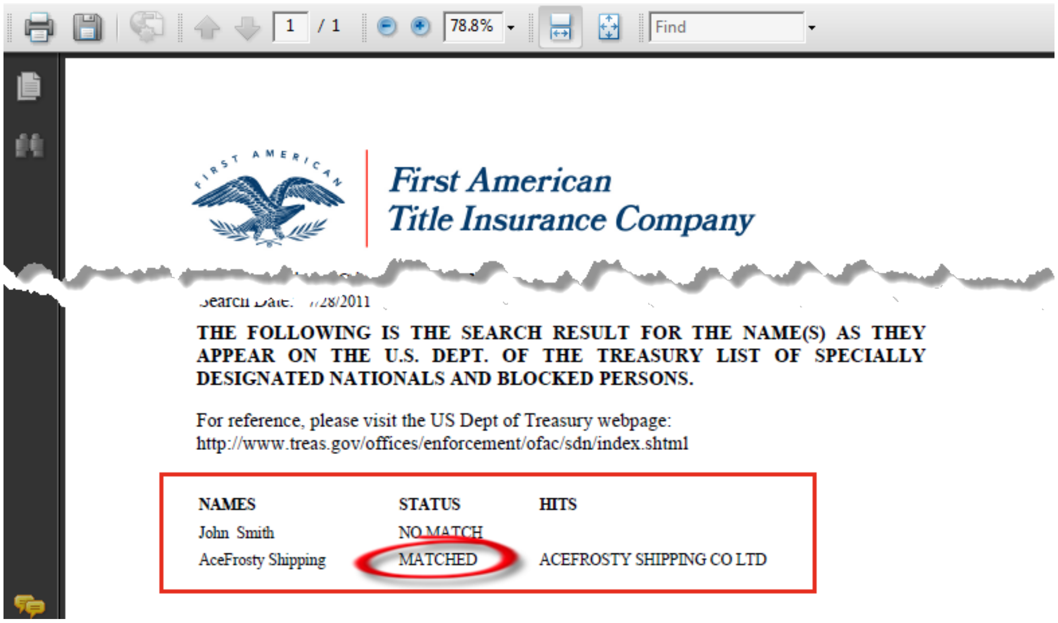
SDN Results

Upon search completion, a summary will appear in the SDN Searches area, including:

a. **Name(s)** searched
b. **Results** of the search
   NOTE: MATCHED indicates that one or more of the names matched the list
c. **Search Date**
d. Link to **View** the full search results



1. Click to **View** the full search results in PDF format:



Search Date: /28/2011

THE FOLLOWING IS THE SEARCH RESULT FOR THE NAME(S) AS THEY APPEAR ON THE U.S. DEPT. OF THE TREASURY LIST OF SPECIALLY DESIGNATED NATIONALS AND BLOCKED PERSONS.

For reference, please visit the US Dept of Treasury webpage: http://www.treas.gov/offices/enforcement/ofac/sdn/index.shtml

NAMES	STATUS	HITS
John Smith	NO MATCH	
AceFrosty Shipping	MATCHED	ACEFROSTY SHIPPING CO LTD

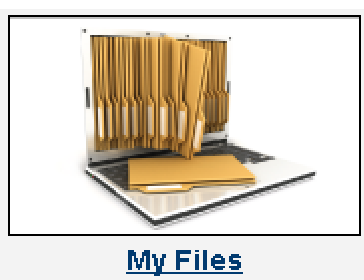
IMPORTANT!

NOTE: If the SDN search results contain a MATCH, please read the additional information provided at the bottom of your results page and contact your local Underwriting Department for further guidance.

Search Back Title

Back Title information is useful in aiding your title search by providing a point of reference back to where title was last researched and insured as well as any additional exceptions that were detailed on previous title.

Back Title is not offered or authorized in the following states: AK, AR, CO, HI, ID, KS, MN, MO, MT, NE, NV, NM, NY, ND, OK, OR, SD, TX, UT, WA, WI or WY.



Access Back Title

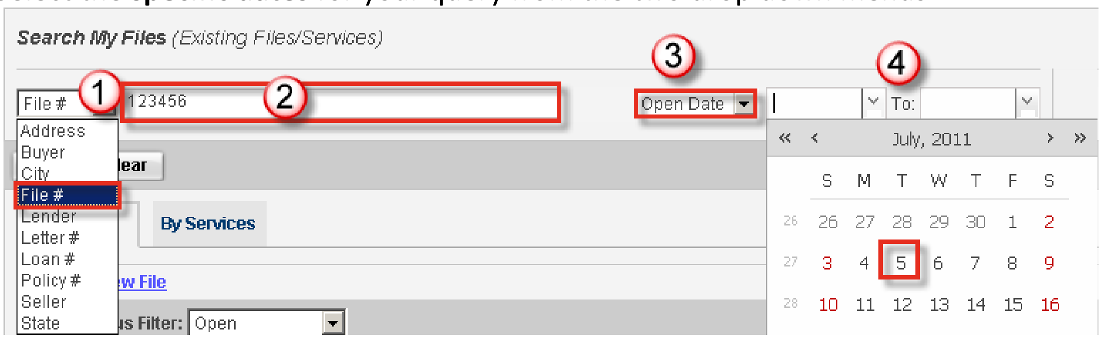
Navigate to Back Title by clicking the **My Files** icon on the AgentNet home page.

From the **My Files** screen select:

1. **By Files** to search for existing files associated with your account
2. **By Services** to select a specific service and identify files that have that service created
3. **By Shared Files** to search for existing files associated with business partners

Search for a File

1. Select your preferred **search parameter** from the dropdown menu
2. Enter the specific **criteria** to locate your file
3. Select either **Open Date** or **Close Date**
4. Select the **specific dates** for your query from the two drop down menus



View by Files

1. From the By Files tab click ⊞ to the left of the file number to expand the file's information
   a. If Back Title appears in the list of services for that file, click on this hyperlink to view the information

   OR

   b. Click [Create New Service] to create back title for the file

View by Services

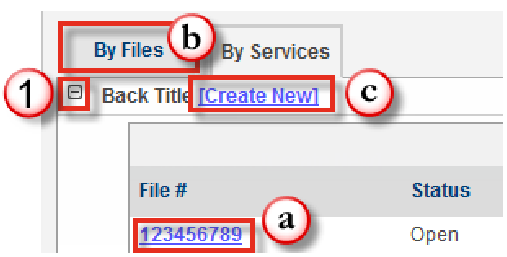
1. From the By Services tab click ⊞ to the left of Back Title to display a list of files with Back Title attached
   c. Click on the **File #** to open that file

   OR

   d. If an **existing file** does not appear, click By Files tab to locate the file and create a new file for it

   OR

   e. Click [Create New] to create a **new file** with Back Title attached



View by Shared Files

1. From the By Shared Files tab click ⊞ to the left of the file number to expand the file's information
   a. If Back Title appears in the list of services for that file, click on this hyperlink to view the information

   OR

   b. Click [Create New Service] to create back title for the file

Note: A will appear next to the file number if this file is being shared by your firm with a partner firm. Only your firm can discontinue sharing it. A will appear next to the file number if this file is being shared with your firm by a partner firm. Only the partner firm can discontinue sharing it.

Search Back Title

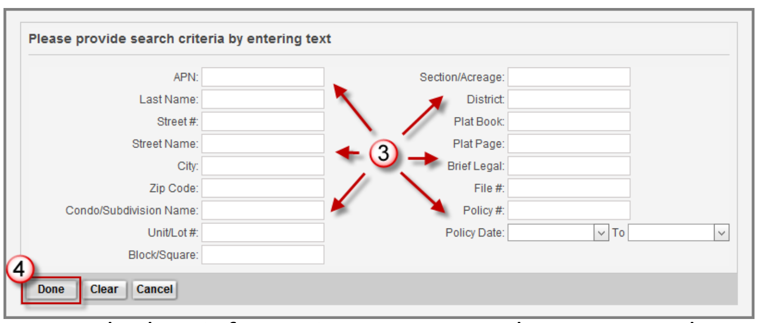
The **Back Title** tab is available on the File Services page.

1. Click on the Back Title tab
2. Click on the Select Search Options hyperlink
3. Complete the appropriate **search criteria** fields

   NOTE: If you validated your property address when entering, the street name and city will automatically populate.

   NOTE: You may also perform a wildcard search by entering a "%" in the field.

4. Click **Done**



NOTE: The less information you enter, the more results your search will produce.

NOTE: To erase all data entered, click Clear .

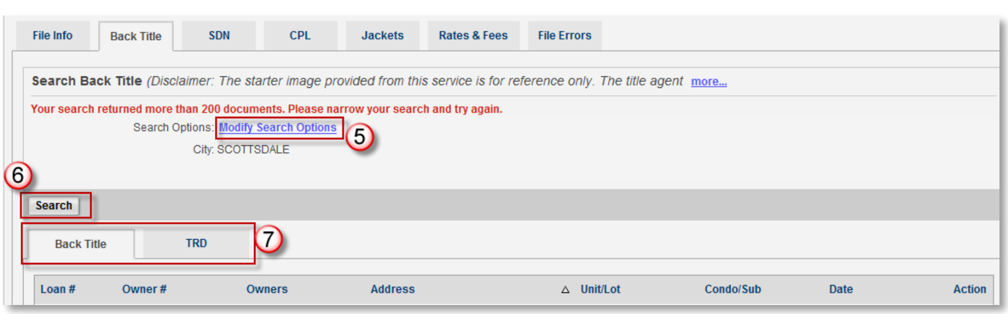
NOTE: To cancel and exit Search Options, click Cancel.

5. Click Modify Search Options to change your search criteria

6. Click Search to begin your query and display the data

   NOTE: Searches will only return the first 200 records. If your search yields more than 200 records, then you should consider modifying your search.

7. After performing your search, the results will be displayed in two different tabs entitled **Back Title** and **TRD**



Back Title

The Back Title tab will display links to available policy images that meet your search criteria.

1. Click on the link underneath either the **Loan #** or **Owner #** column to view the applicable document
2. Click Attach to attach policy images to your file for later reference

NOTE: Attaching allows you to refer back to the information without having to perform the same search again.

Back Title | TRD

Loan #	Owner #	Owners	Address	Unit/Lot	Condo/Sub	Date	Action
55127042705		MALINOWSKI, WILLIAM SCOTT MALINOWSKI, ROBERTA LISA	6730 E VOLTAIRE AVE, SCOTTSDALE MARICOPA AZ			4/11/2006	Attach
55127042711		WEINBERG, MICHAEL WEINBERG, RON	7602 E SANDS DR, SCOTTSDALE MARICOPA AZ			5/8/2006	Attach
	006-E0010068	ALLIANCE HOMES, LLC	8447 E. NIGHTINGALE STAR DR., SCOTTSDALE MARICOPA AZ		SIERRA BOULDERS	11/23/2009	Attach
1001024-0253002		ACKER, PAMELA	, SCOTTSDALE MARICOPA AZ		CHATEAU DE VIE 5	2/11/2009	Attach
	5016500-0007899		27971 N 91ST ST, SCOTTSDALE MARICOPA AZ		MERIT CROSSING	5/25/2010	Attach

TRD

The TRD tab provides results from First American's Title Resource Database (TRD) that meets your search criteria.

1. Click the View link under the **LegalDesc** column to open a window displaying the property legal description

NOTE: You may copy the data by highlighting the information with your cursor and holding down "Ctrl" and "C" on your keyboard. Then paste to any document on your computer by holding down "Ctrl" and "V"

2. Click the Search Starter link under the **StarterImage** column to open a pdf image of a Policy, Commitment or a Starter document
3. Clicking the Search Starter link will add an Attach eneath the **Action** column. By clicking the link you can attach the information to your file for later reference

   NOTE: Attaching allows you to refer back to the information without having to perform the same search again

4. Also, after clicking Search Starter, the link is now replace with a View l ink to open the image again

Back Title | TRD

Page 1 of 20 (195 items) [1] 2 3 4 5 6 7 ... 18 19 20 All

Fast OrderNo	Order Date	Street Number	Street Name	City	State	County	Zip	LegalDesc	StarterImage	Action
	11/8/2005		PTN BLDG 13	Scottsdale	AZ	Maricopa	85260	View	View	Attach
	7/30/2005		VACANT LOTS	Scottsdale	AZ	Maricopa	85255	View	View	Attach
	2/24/2004		LOTS 17 38 39 40 AND 41 EAGLERIDGE AT FOUNTAIN HILLS	Scottsdale	AZ	Maricopa	85268	View	Search Starter	
	4/5/2004		LOT 31 THE COCHISE/ GERONIMO VILLAGE DESERT MOUNTAIN	Scottsdale	AZ	Maricopa		View	Search Starter	
	4/5/2004		LOT 42 THE VILLAGE OF PAINTED SKY DESERT MOUNTAIN	Scottsdale	AZ	Maricopa		View	Search Starter	

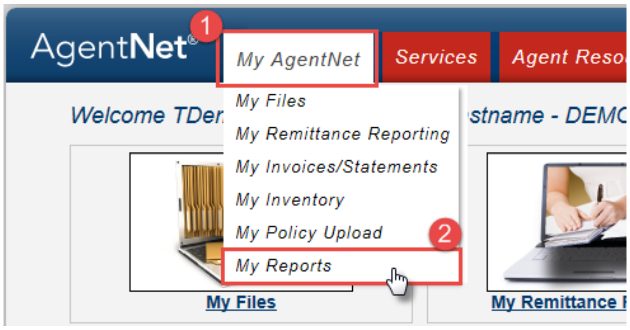
Detach Back Title

To remove title information from your file, simply click Detach under Action.

Accessing My Reports

To navigate to My Reports and access the available reporting features:

1. Scroll your cursor over the **My AgentNet** tab
2. Select **My Reports**

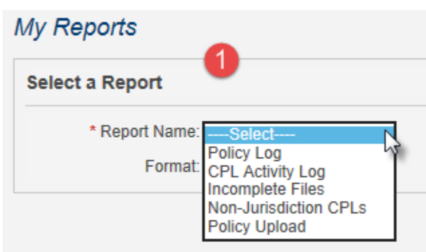


Generate Report

To generate a report in AgentNet:

1. Select the appropriate report option from the **Report Name** drop-down menu

   NOTE: Selecting a report will load the **Select Report Criteria** section below

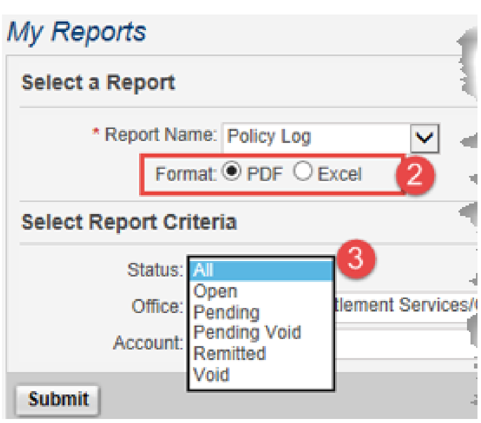


2. Select the **Format** for the report

   NOTE: After selecting format, for Policy Upload report you will be asked to select **Report Type** before proceeding to step 3

3. Select the appropriate status based on the report selected

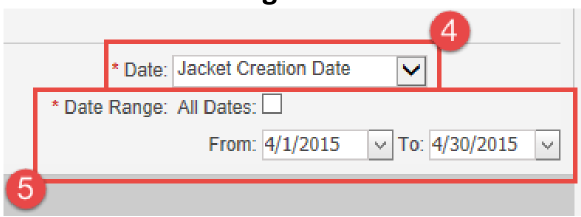
   NOTE: Status filter options vary between the CPL Activity Log and Policy Log



4. For Policy Logs, select the specific Date range parameter you prefer to use in the **Date** dropdown menu. You can select either:
   a. Jacket Creation Date
   b. Date of Policy
   c. Policy Compliance Date

   NOTE: Select just the **Date Range** for the Incomplete Files or CPL Activity reports.

5. Select the **Date Range**



   NOTE: Check ☐ to select "All Dates".

6. Select the **Office** for the report

   NOTE: You may select **All** to pull a report for all offices within the firm. You may also select a specific account from the **Account** dropdown or select **All** accounts associated within an office.

7. Click **Submit**

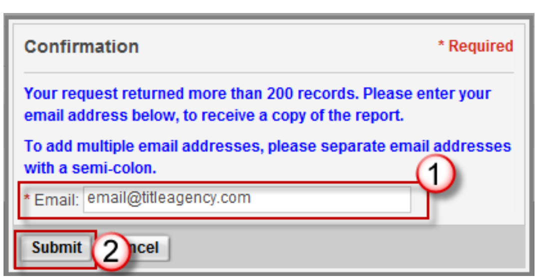
View Report

The report prompt will open:

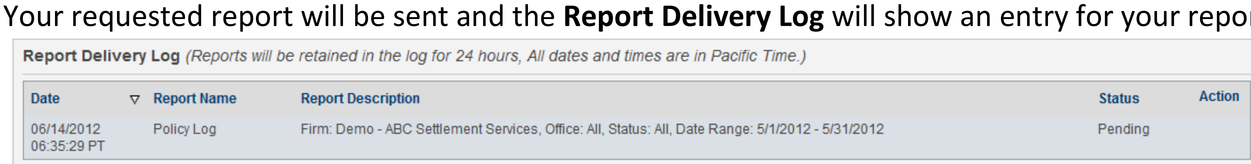
1. Enter the desired **Email** address for delivery of the report

   NOTE: To add multiple email addresses, separate the addresses with a semi-colon.

2. Click **Submit**



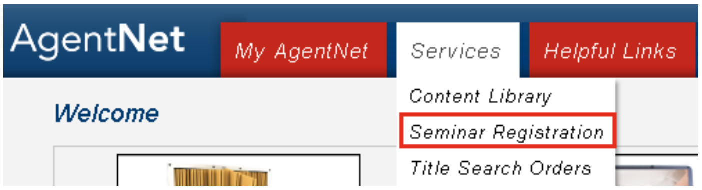
3. Your requested report will be sent and the **Report Delivery Log** will show an entry for your report request



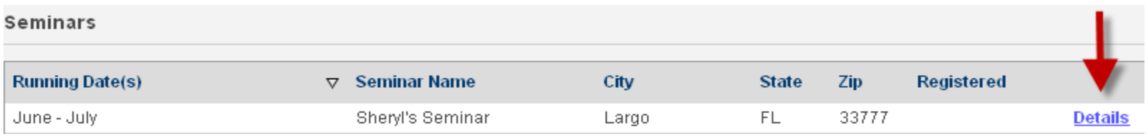
Seminar Registration

Register

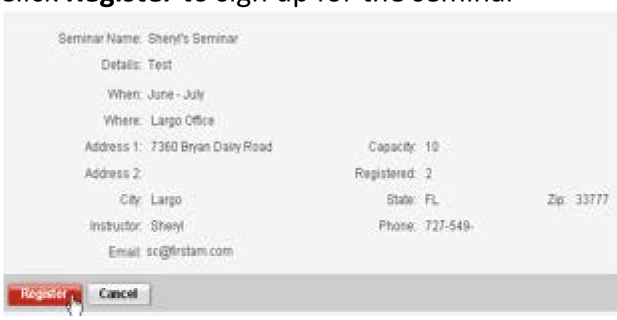
From the Services tab select Seminar Registration.



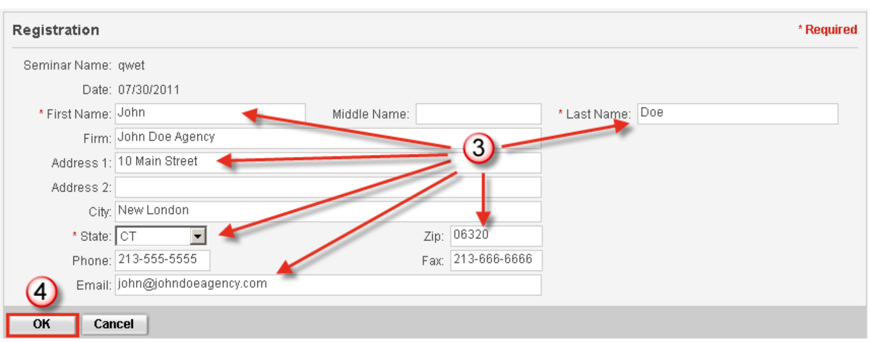
1. Click **Details** link to the right of the seminar for which you want to register



2. Click **Register** to sign up for the seminar



3. Complete **Registration** information
4. Click **OK**



NOTE: Red astrisks (*) denote required fields.

Cancel Registration

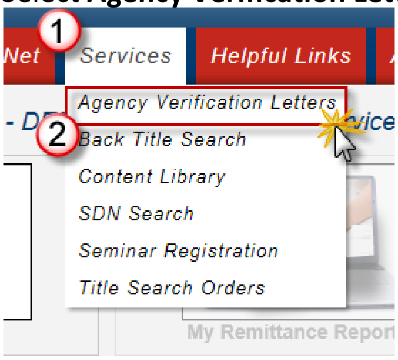
1. Click **Unregister** from seminar details page
2. Click **Yes** to confirm cancellation

Agency Verification Letters

Navigate to Agency Verification Letters

Follow the steps below to navigate to the **AVL** section in AgentNet.

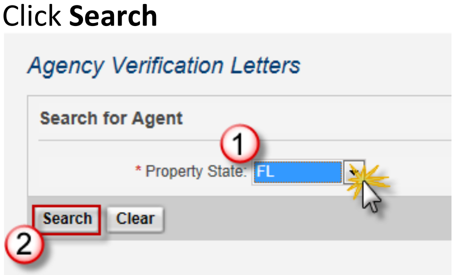
1. From anywhere in AgentNet, scroll your cursor over the red **Services** tab at the top of the page
2. Select **Agency Verification Letters**



Search for an Agent or Approved Attorney

Follow the steps below to search for an **agent** in the Agency Verification Letters section in AgentNet.

1. Select the **Property State** from the dropdown menu
2. Click **Search**

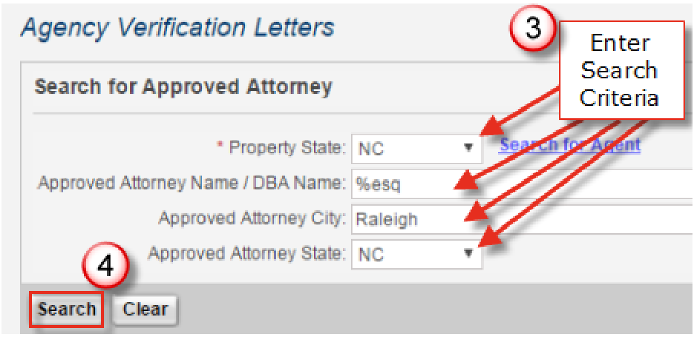


Follow the steps below to search for an **approved attorney** in the Agency Verification Letters section in AgentNet.

1. Click **Search for Approved Attorney**
2. Click **Search**

3. Enter search criteria
   a. **Property State** – This field is required
   b. **Approved Attorney Name/DBA Name**
   c. **Approved Attorney City**
   d. **Approved Attorney State**

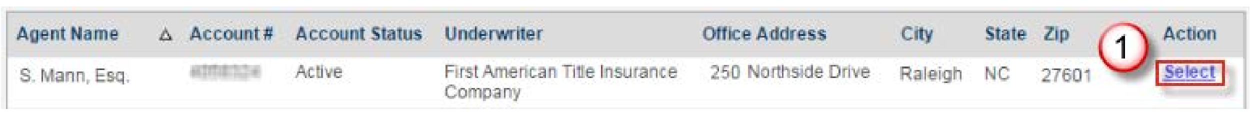
4. Click **Search**



Generate an Agency Verification Letter

Follow the steps below to generate an AVL from the Agency Verification Letter section in AgentNet.

1. Once agent or approved attorney is located, click Select to the right of the appropriate agency office for which you wish to generate the AVL

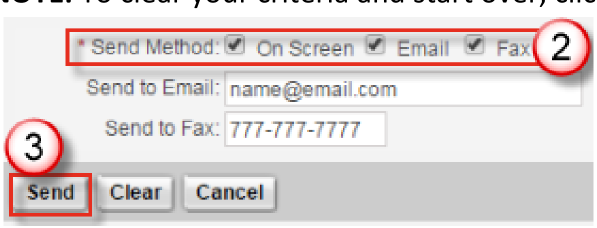


2. Select a send method by checking the ☐ next to any or all of the following:
   a. **On Screen** – Will open your AVL as a pdf and display on your computer
   b. **Email** – Will send your AVL to the email address designated in the space below
   c. **Fax** – Will fax your AVL to the fax number designated in the space below

NOTE: If selecting either Email or Fax, you must enter the supporting address or fax number in the appropriate space below.

3. Click **Send**

NOTE: To clear your criteria and start over, click **Clear**. To cancel the AVL generation, click Cancel



**For technical support, contact the Agency Service Center at agencysupport@firstam.com*

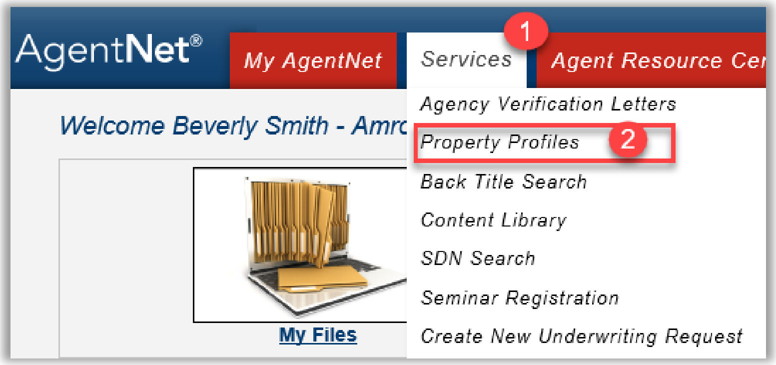
Property Profiles

Learn to use the Property Profile feature in AgentNet®. Property Profiles is a user rights restricted feature. To request the user right or for more information, please reach out to your Agency Representative.

Access Property Profiles

Follow the instruction below to access Property Profiles from the AgentNet home screen.

1. Scroll your cursor over the **Services** tab
2. Select **Property Profiles**



Search for Property

Follow the steps below to locate a property on which you want to generate a report.

1. Select the appropriate option from the **Search By** dropdown menu. You can select form the following:
   a. **Address** – Searches for properties using the street address
   b. **Owner Name** – Searches for properties using the Owner's name
   c. **APN** – Searches for properties using the APN number

   NOTE: Each selection requires you to also designate the City, State, Zip and/or County.

2. Complete the require fields indicated by an "*"

   Tip: When searching, the less information that is provided the more results will return. If your search returns no results, consider less information.

3. Click **Search**

Recent Searches

To retrieve previous property searches, follow the steps below:

1. Click the Recent Searches hyperlink

   NOTE: A new window will open displaying hyperlinks of previous addresses searched.

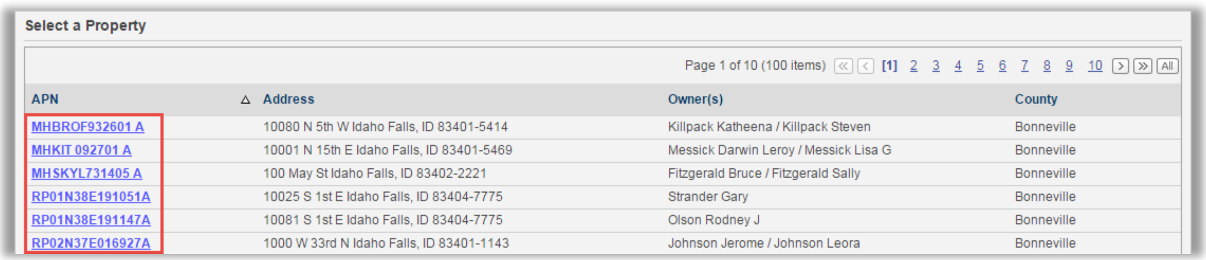
2. Select the appropriate address from the options provided

Search Results

The following will detail the search results from a property search in AgentNet along with generating reports.

Select a Property

If your search results produce multiple properties select the appropriate **APN** corresponding to the address searched.


Select a Property

Page 1 of 10 (100 items) [1] 2 3 4 5 6 7 8 9 10 All

APN	Address	Owner(s)	County
MHBROF932601 A	10080 N 5th W Idaho Falls, ID 83401-5414	Killpack Katheena / Killpack Steven	Bonneville
MHKIT 092701 A	10001 N 15th E Idaho Falls, ID 83401-5469	Messick Darwin Leroy / Messick Lisa G	Bonneville
MHSKYL731405 A	100 May St Idaho Falls, ID 83402-2221	Fitzgerald Bruce / Fitzgerald Sally	Bonneville
RP01N38E191051A	10025 S 1st E Idaho Falls, ID 83404-7775	Strander Gary	Bonneville
RP01N38E191147A	10081 S 1st E Idaho Falls, ID 83404-7775	Olson Rodney J	Bonneville
RP02N37E016927A	1000 W 33rd N Idaho Falls, ID 83401-1143	Johnson Jerome / Johnson Leora	Bonneville

Subject Property

The Subject Property section provides property details including current owner and APN.

There is also an Aerial Map for the subject property provided. Click the Expand Map hyperlink to view the map in a larger window.

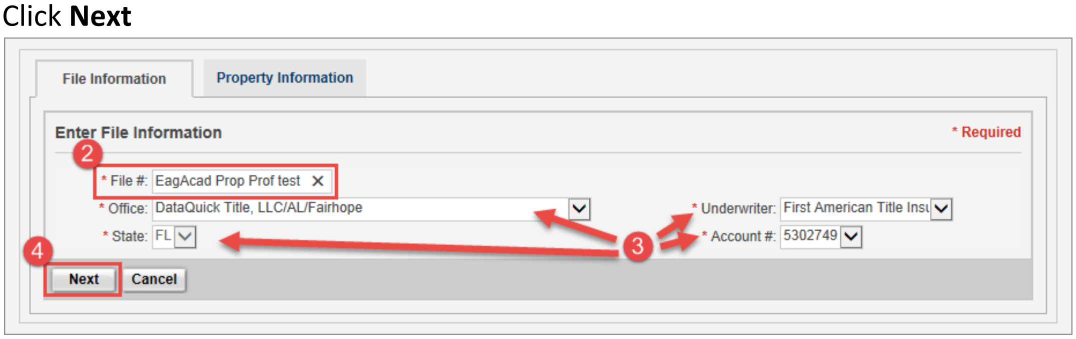
Create New File from Property Search

Follow the steps below to create a new file using the property search.

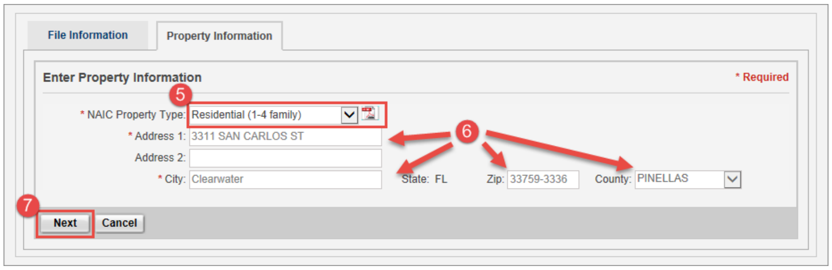
1. Click the Create New File hyperlink

   NOTE: The Create New File window will open.

2. Enter the appropriate File Number
3. Select the appropriate options form the available dropdown menus
4. Click **Next**

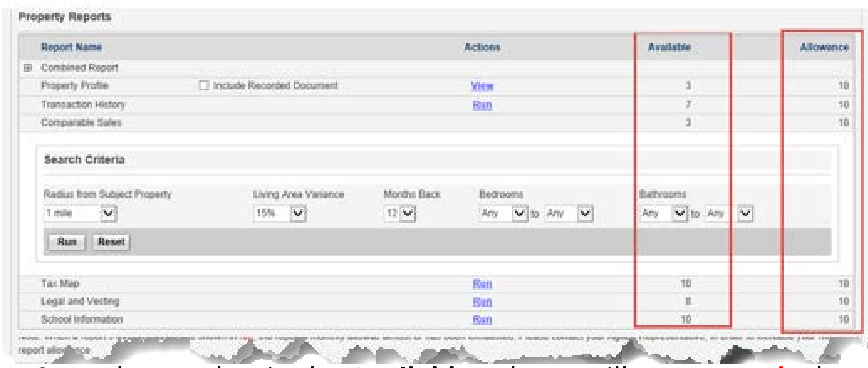


5. Select the appropriate **NAIC Property Type** from the dropdown menu
6. Verify the property information that has automatically populated
7. Click **Next**



Property Profiles

Follow the instruction below to generate Property Profiles from the property search. Users are granted a monthly allowance on the number of each individual Property Profile features they can generate. The **Allowance** column on the far right will indicate how many you can generate per month and the **Available** column indicates how many you have remaining in the current month.

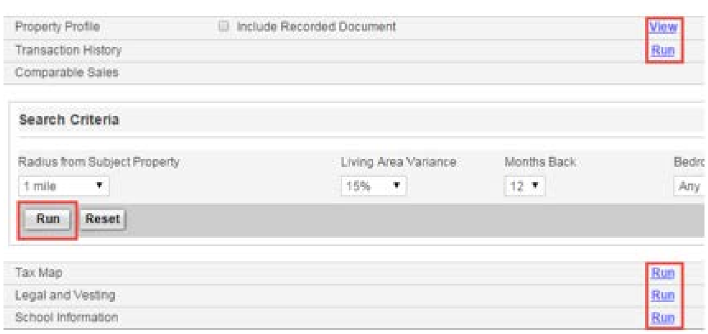


NOTE: The number in the **Available** column will appear **Red** when your available reports are almost exhausted.

Individual Reports

There are two ways to run Property Profiles, individually by Report Name or as one Combined Report. Follow the steps below to run an individual report:

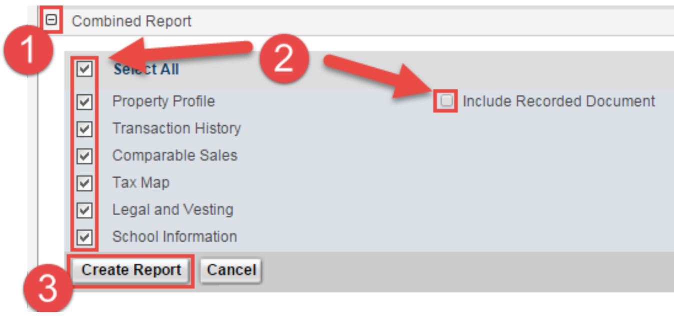
1. Pick one of the following reports (Property Profile, Transaction History, Comparable Sales, Tax Map, Legal and Vesting or School Information) and click Run
2. A browser window will open the report in a PDF which can be saved
3. Once you have Run a report you will be able to View it for later use without running the same report again



Combined Report

Follow these steps to run a combined report:

1. Click the ⊞ next to **Combined Report**
2. Select which reports you would like to include in the **Combined Report**
3. Click Create Report



NOTE: A browser window will open the report in a PDF, which can be saved. Once you have completed running a Combined Report, both the Combined Report and all of the Individual Reports will change to a View status. This will allow you to view the reports without using your allowance of available reports again.

Contact a Potential Business Partner (First American Agent)

When you have a Business Partner for a transaction, you may share a file or the Business Partner may share a file with you. You only have to set up a Business Partner once. After that, you may share any files with that partner.

When communicating with a potential Business Partner, use the following Role and Responsibility checklist to establish the following:

Role and Responsibility Checklist for Potential Business Partner	Yes	No
Is the Business Partner a First American Agent with AgentNet access?		
Do you have a primary contact with a valid email address for the Business Partner?		
Is the Business Partner Responsible for Closing Protection Letters?		
"…" Policy Jackets?		
"…" Fee Calculation?		
"…" Remittance to First American? (The office that generates the policy jacket)		
Do you have the First American Agency Account number for the Business Partner? (NOTE: Only one account number is needed.)		
Is your potential Business Partner licensed to do business in the states you require?		

NOTE: This contact will receive all notifications regarding the partnership and file sharing

Link/Share File

Once you have a business partner established and are ready to collaborate on a file in AgentNet with them, you can link the file to them in AgentNet. Follow the steps below to share a file with your business partner in AgentNet.

1. Within your file, select the appropriate option from the **Share File** dropdown menu

   NOTE: If you currently have no business partners in that jurisdiction, proceed to step 2 of Without Existing Business Partner.

2. Select the appropriate Business Partner office to provide access via the dropdown menu

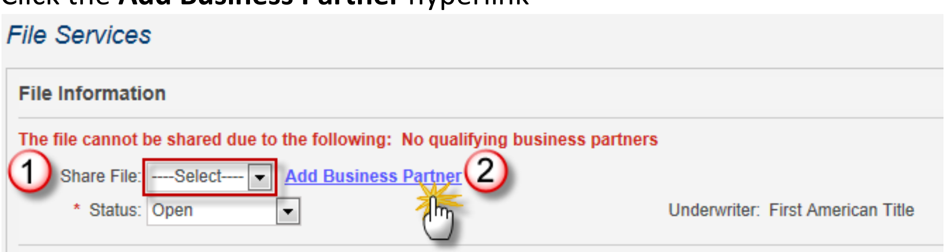
3. Once a file is shared with a Business Partner either Agent with user rights may now order services, such as Closing Protection Letters and Jackets, for that particular file

   NOTE: A notification will be sent to the designated business partner indicating a file has been shared. If you receive a sharing request notification, refer to Locating a Shared File.

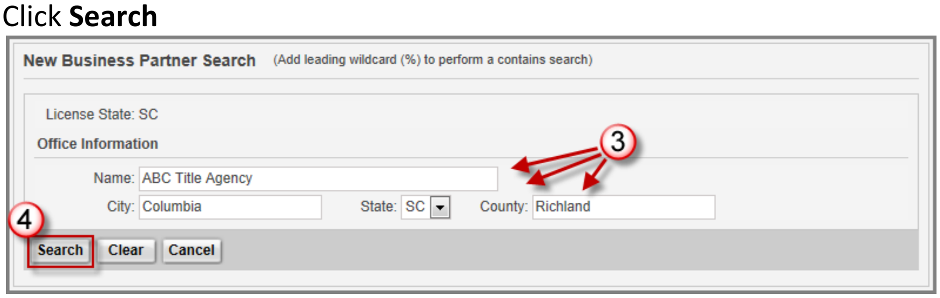
Without Existing Business Partner

Follow the steps below to share a file without having an existing business partner.

1. Select the appropriate option under the **Share File** dropdown menu
2. Click the **Add Business Partner** hyperlink

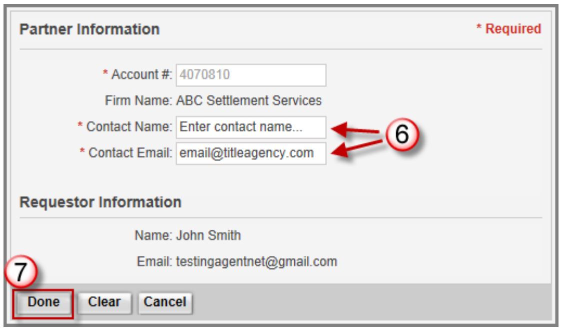


3. In the new window, type the **Name**, **City**, **State** and/or **County** for the firm you wish to partner with on your file
4. Click **Search**



5. Click Select next to the firm you wish to partner with on your file

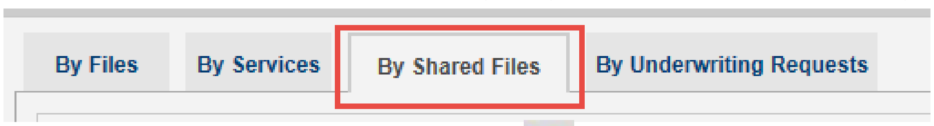
6. In the new window, enter Contact Name and Contact Email
7. Click **Done**



8. Click **Save**
   NOTE: A communication will be sent to your business partner automatically, notifying them of the file sharing. Make sure your business partners are aware of the file and their role on the file.

Locate a Shared File

Follow the instruction below to locate an existing shared file in AgentNet.
You can locate all Shared Files by navigating to "My Files" and selecting the "By Shared Files" tab.



NOTE: Each shared file also will have an icon indicating a shared file and the direction of the sharing.

Manage Business Partners

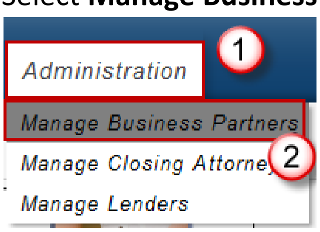
Follow the steps below to manage add new business partnerships in AgentNet.

Add Business Partners

If you work with regular business partners, you may set them up as a regular business partner in advance. This will enable you to select them from a dropdown menu when sharing a file.

Initiate a Business Partner relationship by doing the following;

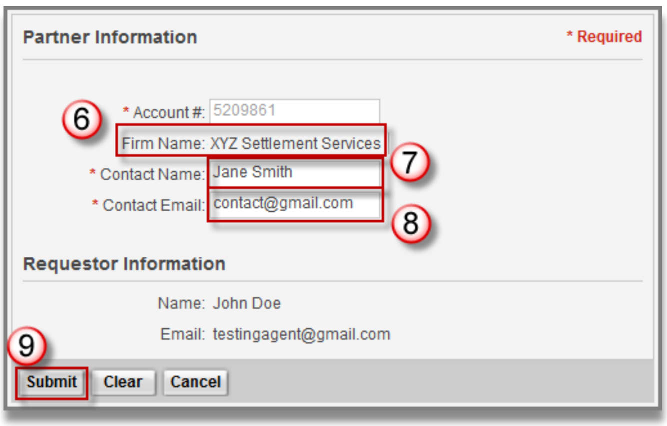
1. Scroll cursor over the **Administration** tab
2. Select **Manage Business Partners**



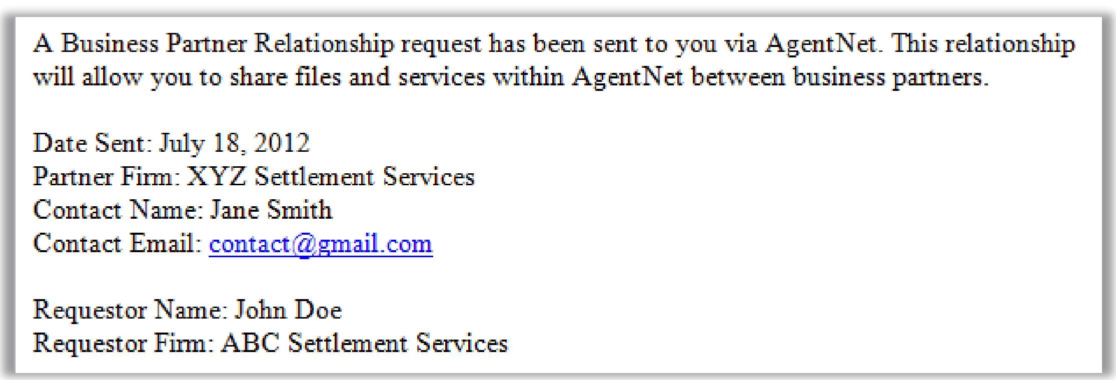
3. Click **Add** to establish a new Business Partner

4. Enter the First American agency account number for the prospective Business Partner
5. Click **Submit**

6. In the next window verify the **Business Partner** name
7. Enter the contact name
8. Enter a valid email address
9. Click **Submit**



NOTE: The Business Partner will now appear with a status of **Request Sent** in the Manage Business Partners section and the email address you entered will receive an email notification with the subject line "AgentNet – Business Partner Relationship Request"

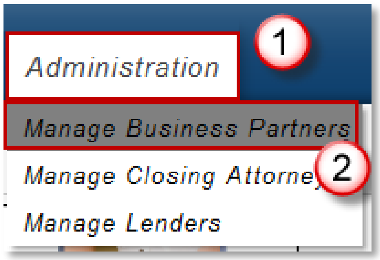

A Business Partner Relationship request has been sent to you via AgentNet. This relationship will allow you to share files and services within AgentNet between business partners.

Date Sent: July 18, 2012
Partner Firm: XYZ Settlement Services
Contact Name: Jane Smith
Contact Email: contact@gmail.com

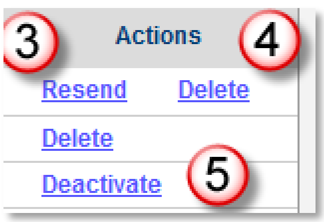
Requestor Name: John Doe
Requestor Firm: ABC Settlement Services

Manage Existing Requests

1. Scroll cursor over the **Administration** tab
2. Select **Manage Business Partners**



3. Under the **Actions** column, clicking **Resend** prompts the user to re-enter the contact name and email address to re-send the Business Partner request
4. Clicking **Delete** prompts the user to verify they wish to withdraw the selected Business Partner request
5. Clicking **Deactivate** for an existing Business Partner will change the status from active to inactive
   NOTE: Deactivating a Business Partner will not affect files previously shared.

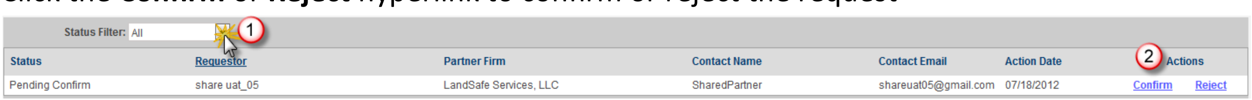


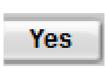
NOTE: Previous Business Partner relationships that show as inactive status must establish a new Business Partner relationship.

Respond to Requests

Requests are sent via email to the appropriate contact and can also be viewed on the **Manage Business Partners** tab.

1. Select **Pending Confirm** from the status filter to view the requests sent to you from other Business Partners
2. Click the **Confirm** or **Reject** hyperlink to confirm or reject the request



3. Click  in the pop-up window to confirm your selection

4. If you confirmed the request, a confirmation email with the subject "AgentNet – Business Partner Relationship Request Confirmed" will be sent to the requestor and the status will be adjusted to "Active" in **Manage Business Partners**

Your Business Partner Relationship request has been confirmed.

Date Confirmed: July 18, 2012
Partner Firm: XYZ Settlement Services
Contact Name: Jane Smith
Contact Email: contact@gmail.com

Requestor Name: John Doe
Requestor Firm: ABC Settlement Services

5. If you rejected the request, a confirmation email with the subject “AgentNet – Business Partner Relationship Request Declined” will be sent to the requestor and the status will be adjusted to “Rejected” in **Manage Business Partners**

Your Business Partner Relationship request has been declined.

Date Rejected: July 18, 2012
Partner Firm: XYZ Settlement Services
Contact Name: Jane Smith
Contact Email: contact@gmail.com

Requestor Name: John Doe
Requestor Firm: ABC Settlement Services

NOTE: When using linking/share file service in AgentNet, some information contained in a shared file may be considered Nonpublic Personal Information (NPI). You may wish to review your ALTA Best Practice #3 Policies and Procedures. Consult outside counsel for additional information or if you have any questions.

Frequently Asked Questions:

Q. Once a file is shared does my Business Partner have access to the entire file on AgentNet to make any changes?

A. The Business Partner for the file will have access to all products and services within the file. The party that produces the policy jacket will have the remittance rights.

Q. What happens if my business partner generates an eJacket on my file that I need to remit on?

A. The office that generates the policy jacket on the file will have the remittance rights in AgentNet. Roles and responsibilities need to be determined prior to file linking/sharing. If the eJacket was generated in error it can be voided and your office can generate a new eJacket that will allow you to remit in AgentNet. If you need to remit on a Closing Protection Letter and your Business Partner has remittance rights for the file then that remittance responsibility will fall on the Business Partner. AgentNet tracks which party has generated which services.

Q. Who has remittance rights if neither party generates an eJacket but both generate separate Closing Protection Letters (CPLs)?

A. The Agent that generates the first CPL is no longer the remitting Agent on the transaction in AgentNet. The other Agent will now retain those rights. Therefore if both parties are issuing CPLs, remittance rights will fall to the Agent who generates the second CPL.

Q. If I cancel a file in AgentNet does my Business Partner still have access to the file?

A. No the file has been cancelled and all products have been voided.

Q. Can my Business Partner change the status of a linked/shared file?

A. Yes, business partners can make a selection from the status drop down menu for the file.

Q. Does Linking/Share File work with my third party integration like SoftPro, RamQuest, etc.?

A. No, this functionality is not currently available for third party integrations. However, if you use third party integration, you may still link/share a file in AgentNet.

Q. What happens if both myself and my Business Partner use third party integration to order services through AgentNet and I create a file using the integration and then link/share a file in AgentNet web service?

A. Because you created the file using the third party integration, you may continue to order services using the integration. However, your Business Partner on the file will only be able to work on that file using the AgentNet web service.

Q. Can I change a Business Partner to another Business Partner on a file?

A. Yes. To do so, de-select the checkbox for Share File and click the Save button. Then you can re-select the Share File checkbox and select the new Business Partner from the drop down menu. Last, click Save to keep your changes.

Q. Can I have more than one Business Partner on a file?

A. No, you can only have one Business Partner assigned per file.

For any questions, you may contact the Agency Service Center at (866) 701-3361 or agencysupport@firstam.com

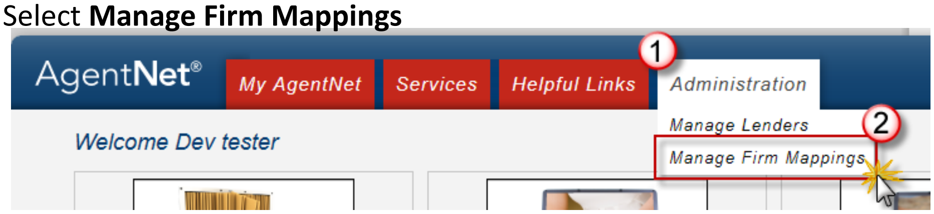
Vendor Fee Mapping and Certification

Certifying your fee mapping is a **required** step in order to enable any Rates and Fees integration with AgentNet. "Manage Firm Mappings" is a restricted user right. In order to obtain the user right in AgentNet, you must also have the Remit and Pay user rights as well. Please refer to the "Request Additional User Rights" job aid in the User Guides tab for more information on requesting new user rights.

Navigation

To review, customize and/or certify vendor fee mapping, navigate to the "Manage Firm Mappings" area by:

1. Scroll your cursor over the **Administration** tab
2. Select **Manage Firm Mappings**



Review Firm Mapping

Follow the steps below to view the existing mappings for your firm beginning from the "Firm Mappings" page.

1. Select the appropriate **Mapping Type** from the dropdown menu

   NOTE: The **Product Mapping** will work automatically from the beginning and does not require customizing or certifying. Your mapping should be focused on endorsements.

2. Select your title production software from the **Select Vendor** dropdown menu
3. Select the existing mapping that you wish to view from the **Select Mapping** dropdown menu

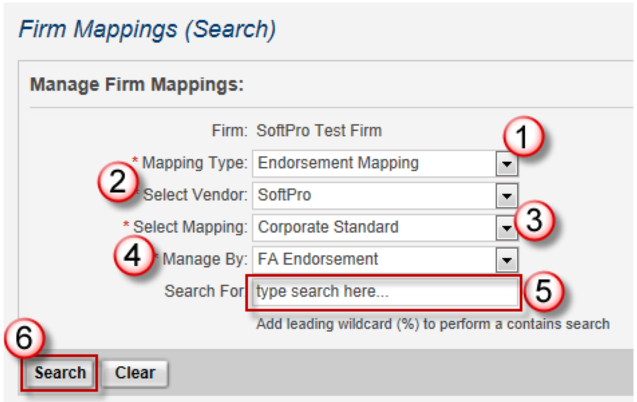
   NOTE: If you have not created custom mapping yet, "Corporate Standard" will be the only available option.

4. Select the method by which you wish to view your result in the **Manage By** dropdown menu. You may select from:
   a. **FA** – Searches based on the First American product/endorsement name
   b. **Vendor** – Searches based on the Vendor's product/endorsement name
   c. **State** – Searches all products/endorsements for a particular state

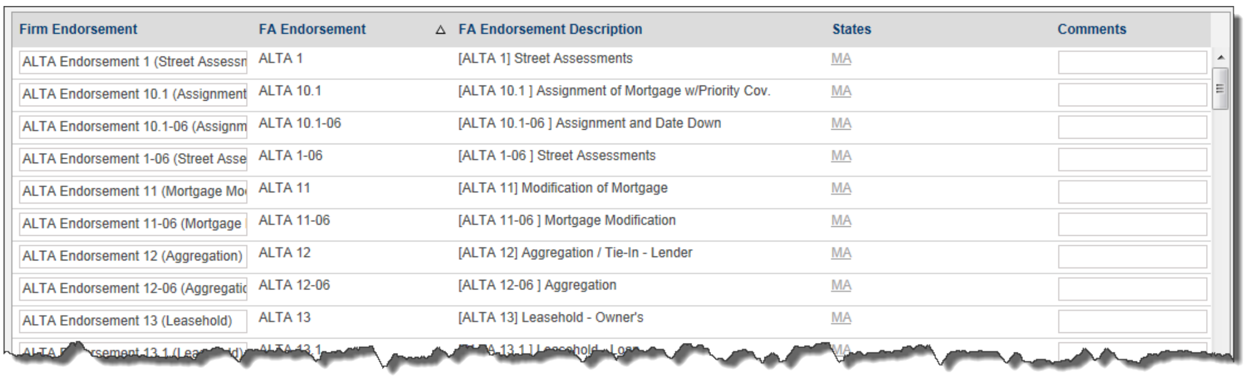
5. Type the name of the product or endorsement you wish to view in the **Search For** field. If you selected to "Manage By" **State**, then select the appropriate state from the dropdown menu

   NOTE: You may use a "%" as a leading wildcard to perform a 'contains' search.

6. Click **Search**



7. Review the names entered under the “Firm Endorsement” column for accuracy by comparing to the names you have for the same endorsements in your title production software



Firm Endorsement	FA Endorsement	FA Endorsement Description	States	Comments
ALTA Endorsement 1 (Street Assessm	ALTA 1	[ALTA 1] Street Assessments	MA	
ALTA Endorsement 10.1 (Assignment	ALTA 10.1	[ALTA 10.1] Assignment of Mortgage w/Priority Cov.	MA	
ALTA Endorsement 10.1-06 (Assignm	ALTA 10.1-06	[ALTA 10.1-06] Assignment and Date Down	MA	
ALTA Endorsement 1-06 (Street Asse	ALTA 1-06	[ALTA 1-06] Street Assessments	MA	
ALTA Endorsement 11 (Mortgage Mo	ALTA 11	[ALTA 11] Modification of Mortgage	MA	
ALTA Endorsement 11-06 (Mortgage	ALTA 11-06	[ALTA 11-06] Mortgage Modification	MA	
ALTA Endorsement 12 (Aggregation)	ALTA 12	[ALTA 12] Aggregation / Tie-In - Lender	MA	
ALTA Endorsement 12-06 (Aggregatic	ALTA 12-06	[ALTA 12-06] Aggregation	MA	
ALTA Endorsement 13 (Leasehold)	ALTA 13	[ALTA 13] Leasehold - Owner's	MA	

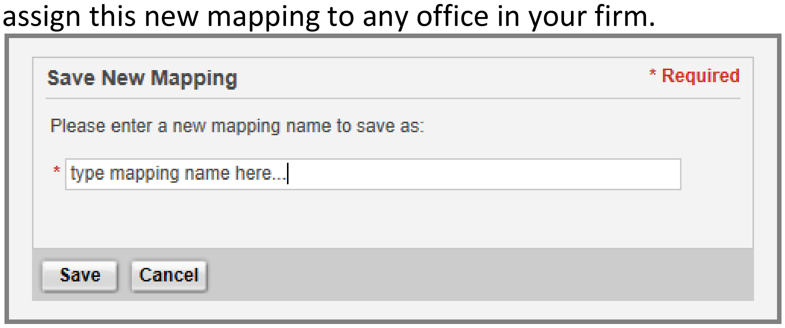
8. To open the products/endorsements you searched for in an Excel file for you to review click **Export**

Create and Edit New Mapping

If you require customizing your mapping, you must create a new mapping. You cannot customize or edit the Corporate Standard mapping however you can use the Corporate Standard as a template. After searching for mapping using corporate standard, follow the steps below:

1. To create a new mapping, click **Save As**
2. In the new window, enter the name you wish to save your new mapping as
3. Click **Save**

   NOTE: Your new mapping will now be available in the Select Mapping dropdown menu for you to work from. From now on, you can select this new mapping to edit instead of Corporate Standard. You will also be able to assign this new mapping to any office in your firm.



4. While reviewing the names of your products or endorsements under the "Firm" column, make any necessary changes
   NOTE: The names must match EXACTLY.

5. You may add multiple names for each product/endorsement by inserting a "|" between each name. You may do so by holding Shift and clicking the key directly above Enter
6. Insert any notes or comments under the **Comments** column for that corresponding product/endorsement
7. When complete, click Save

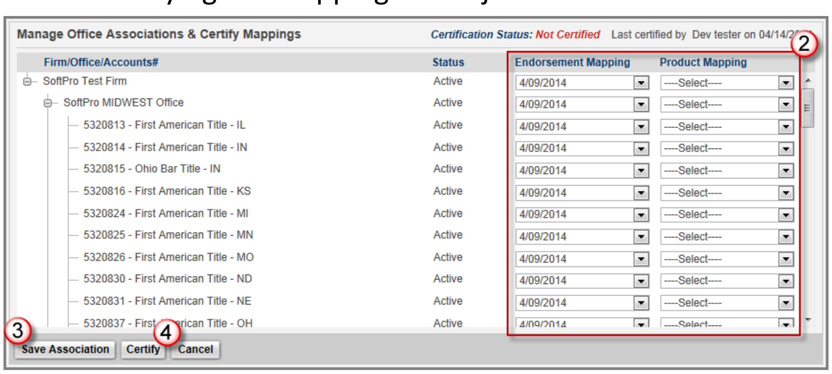
Assign and Certify Mapping

Before you can utilize the Rates and Fees feature in SoftPro, you must assign your mapping to all applicable offices and certify your Endorsement mapping. Follow the steps below to assign your mapping to appropriate offices and certify your mapping.

1. Click the "Manage Office Associations & Certify Mappings" hyperlink on the right
2. In the new window, assign the appropriate mapping for Endorsements or Products for each Firm and/or office by making the appropriate selection in the dropdown menu
   NOTE: If making no changes, skip to step 3.

3. When complete, click Save Association
   NOTE: If any warning prompts appear, read carefully before continuing.

4. Click Certify
   NOTE: Certifying the mappings is subject to the terms and conditions of your End User License Agreement.



5. Click Certify again to confirm you understand the terms of your EULA
6. Your certification status should now read as "Certified" along with the individual user who certified. You can now utilize the Rates and Fees integration for your software vendor

Service Orders

The purpose of this document is to provide detailed instruction on First American Title's Service Orders feature in an AgentNet file. Service Orders is designed to provide a communication portal for title agents to order, track and receive title product from First American.

Express Order Entry

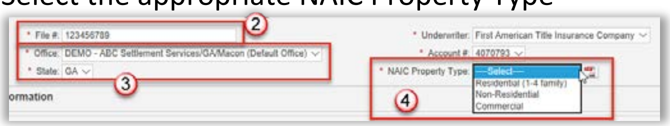
Follow the steps below to quickly request a Service Order and create a new AgentNet File at the same time.

1. From the Services tab, select "Create New Service Order"

2. Enter your File #
3. Select the appropriate Office and State

   NOTE: The Underwriter and Account # are automatically populated

4. Select the appropriate NAIC Property Type



5. Select the appropriate Property Information radio button and enter the Property Address or APN below

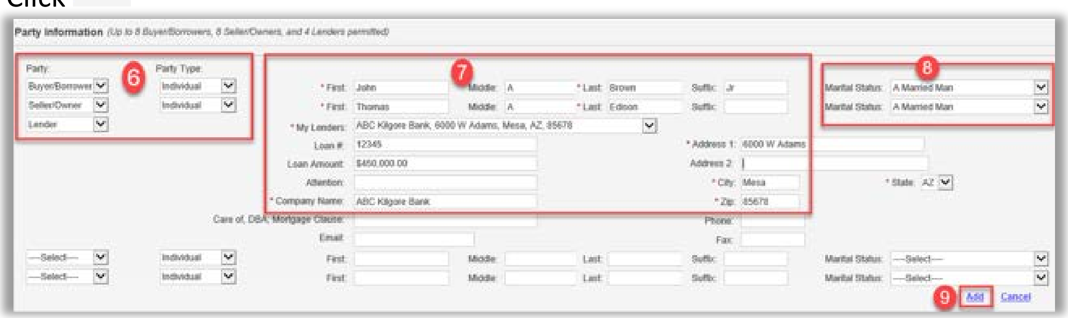
   NOTE: To add additional APNs, enter each number separated by a semi-colon.

   NOTE: Clicking Validate Address Information will verify the address entered through property records for a match.

6. In the Party Information section select the Party and Party Type
7. Enter the Party Names

   NOTE: If the Party is a Lender, select one from the drop-down menu and complete any additional information as needed.

8. Select the Party's Marital Status, if appropriate
9. Click Add



10. Continue to Step 2 in **Place an order**

Using the Service Orders Tab in AgentNet

In this section, we will provide you step-by-step instruction on utilizing the Service Orders tab within a file in AgentNet to place Search Requests.

NOTE: Delivery of all products placed in the Service Orders tab will occur the same way that they are currently being handled as well as through AgentNet.

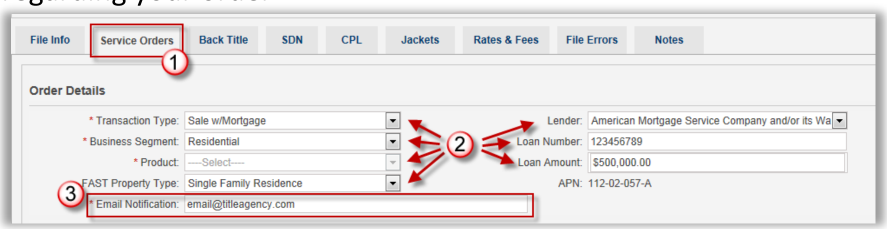
Place an Order

Follow the steps below to place a Search Request using the Service Orders tab within a file in AgentNet.

1. Beginning from an existing AgentNet file, click Service Orders
2. Select the appropriate options from the available drop-down menus

   NOTE: If the **Lender** was entered in the **Party** section, that information will automatically populate.

3. Enter the email address, or addresses separated by a semi-colon, that you would like to receive notifications regarding your order



NOTE: For Connecticut properties, proceed to [Connecticut Order Info]

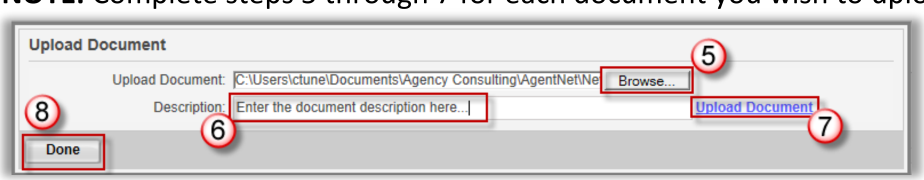
NOTE: For South Carolina properties, proceed to [South Carolina Order Info]

4. If you have required or helpful documentation for the order, click Attach Documents

   NOTE: MS Word, PDF and TIFF file formats can be uploaded to this section. If not uploading a document, proceed to step 9.

5. Click Browse... to locate the document you wish to upload
6. Once a document is selected, enter a Description of the document
7. Click Upload Document
8. Click Done

   NOTE: Complete steps 5 through 7 for each document you wish to upload



9. Enter any Notes regarding your order in the provided field
10. Click Create Order

   NOTE: If requesting a non-insured product, you must check the box to accept the terms and conditions before continuing.

☑ * I accept the terms and conditions for the Ownership & Encumbrances Report

Connecticut Order Info

Follow the steps below to complete an order request for properties in the state of Connecticut.

1. In the **Order Info** section, select the **Due Date** from the drop down menu
2. Select the appropriate **Search Type** option:
    a. Current Owner Rundown
    b. Full Search
    c. Two-Owner Search
    d. Contin/Update
3. Highlight applicable **Municipal Search Types** and click Add >
   NOTE: Hold down the Ctrl button to select multiple options.
4. Highlight and click < Remove to remove any **Municipal Search Types**

5. Select the appropriate **Copy Type** option:
    a. Full
    b. Limited
    c. Refinance

6. Continue to step 4 of [Place An Order]

South Carolina Order Info

Follow the steps below to complete an order request for properties in the state of South Carolina.

1. In the **Order Info** section, select the applicable **Search Type** option:
    a. Without prior
    b. With prior
    c. Developer Forward

2. Continue to step 4 of [Place An Order]

Non-Jurisdiction Search Orders

AgentNet offers an option to create new orders and submit search orders for any state outside of your approved jurisdiction if needed.

- This activity right requires the appropriate setup to your account
- Contact your local First American representative for more information on using this feature

Manage an Order

Follow the steps below to manage an existing order or retrieve returned documentation on your service order.

From the Service Orders tab in your AgentNet file, you may edit your Order any time by clicking View/Edit.
NOTE: Some fields may be greyed out and unavailable for editing.

Order Progress Details

Under **Order Progress Details** tasks will be displayed indicating the status of your order's progress within the process. This area will list any tasks associated with your order and their status. These tasks will help you follow the progress of your service order. The tasks are entered automatically according to the product ordered.

Each Task will list the name of the task, when it has been started, when completed, if the task has been Waived, and any comments regarding the task. A task may be "Waived" by First American if determined it is not needed.

Order Progress Details

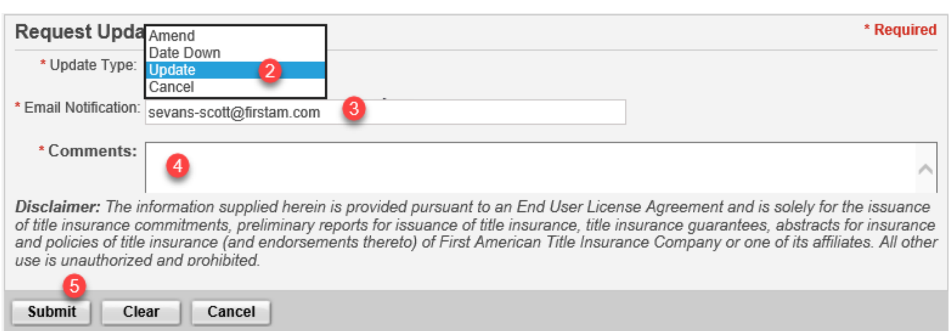
Tasks	Started	Completed	Waived	Comments
Assemble and Distribute Title Product			No	
Commitment Completed			No	
Survey			No	

Request an Update

You can request to update, date down, amend or cancel a search order. You can also request an update on orders with a closed status.

1. Click Update Order

2. In the **Request Update** window, select the applicable **Update Typ**e option:
   a. Amend
   b. Date Down
   c. Update
   d. Cancel
3. Verify/enter your **Email Notification** address
4. Enter applicable **Comments**
5. Click **Submit**

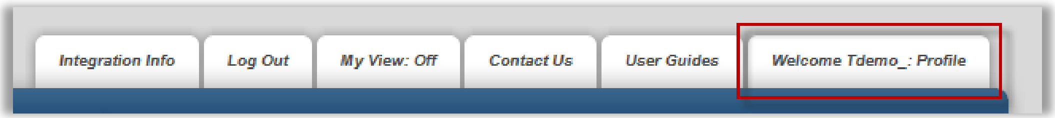


NOTE: The **Request Update** option should be used after the search order has been returned in order to request a date down or update search. This will give the product the most current effective date.

Service Provider Email Notifications

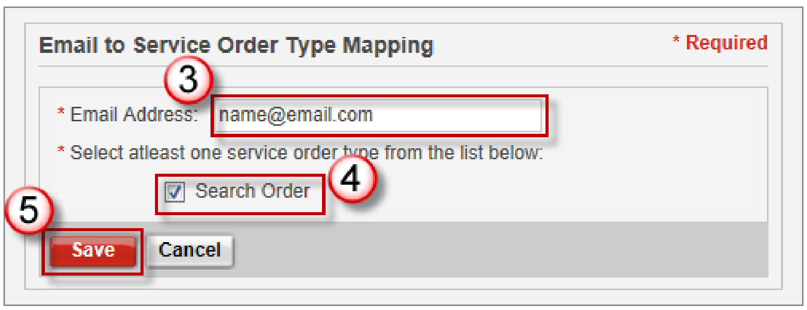
Follow the steps below to designate the email addresses you prefer to receive notifications for service orders in AgentNet.

1. Click the "Welcome" tab in the top right corner of the window



2. Click Add under the **Service Provider Email Notifications** section

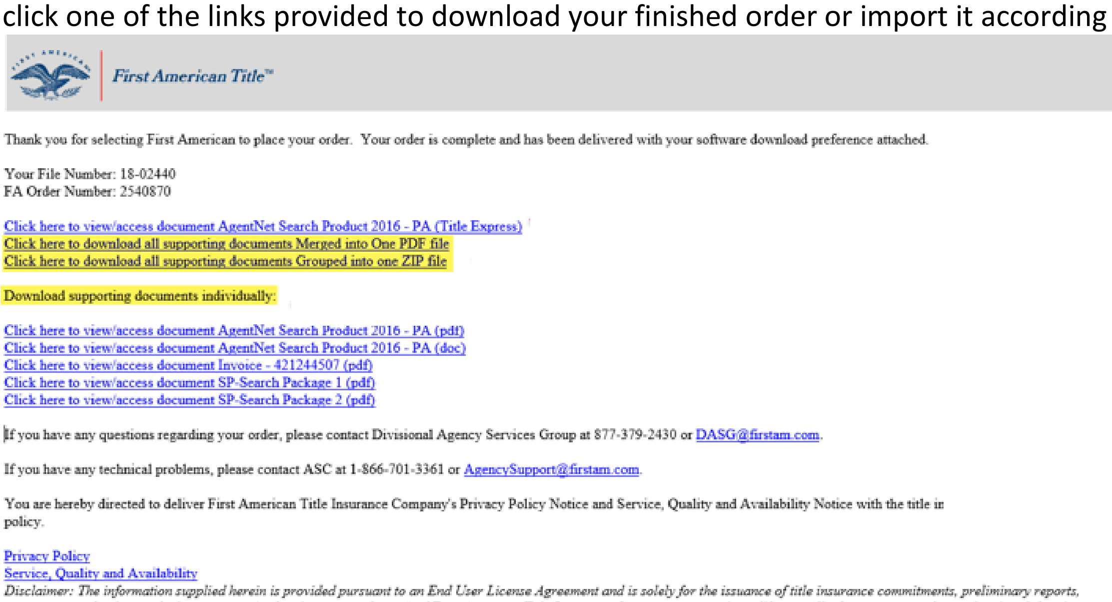
3. Enter the email address you wish to receive notifications to in the space provided
4. Check ☐ next to the service order type you wish to receive notifications for
5. Click Save



6. To add additional addresses, click Add and repeat steps 3-5

Order Complete

When your order is completed, you will receive an email notification indicating to you the order is ready. You can click one of the links provided to download your finished order or import it according to your order preferences.



First American Title™

Thank you for selecting First American to place your order. Your order is complete and has been delivered with your software download preference attached.

Your File Number: 18-02440
FA Order Number: 2540870

Click here to view/access document AgentNet Search Product 2016 - PA (Title Express)
Click here to download all supporting documents Merged into One PDF file
Click here to download all supporting documents Grouped into one ZIP file

Download supporting documents individually:

Click here to view/access document AgentNet Search Product 2016 - PA (pdf)
Click here to view/access document AgentNet Search Product 2016 - PA (doc)
Click here to view/access document Invoice - 421244507 (pdf)
Click here to view/access document SP-Search Package 1 (pdf)
Click here to view/access document SP-Search Package 2 (pdf)

If you have any questions regarding your order, please contact Divisional Agency Services Group at 877-379-2430 or DASG@firstam.com.

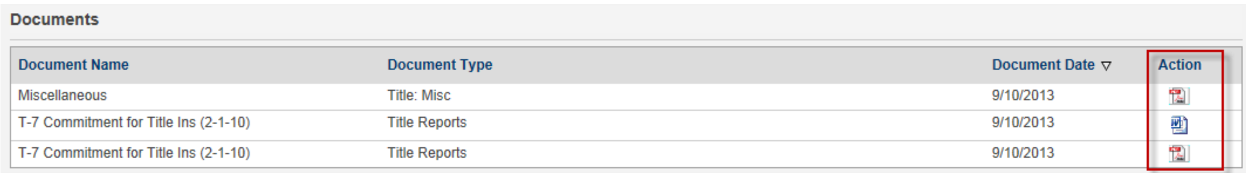
If you have any technical problems, please contact ASC at 1-866-701-3361 or AgencySupport@firstam.com.

You are hereby directed to deliver First American Title Insurance Company's Privacy Policy Notice and Service, Quality and Availability Notice with the title in policy.

Privacy Policy
Service, Quality and Availability
Disclaimer: The information supplied herein is provided pursuant to an End User License Agreement and is solely for the issuance of title insurance commitments, preliminary reports, guaranties, and policies of title insurance (and endorsements thereto) of First American Title Insurance Company or one of its affiliates. All other use is unauthorized and prohibited.

Documents

When you receive your notification that your order is complete, you may also retrieve your documents from the **Documents** window. From the Service Orders tab in your AgentNet file, simply click on the icon under the **Action** column to open the desired document. You can download the attached document(s) from here as well.



Documents

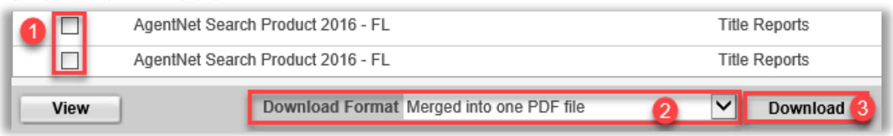
Document Name	Document Type	Document Date ▽	Action
Miscellaneous	Title: Misc	9/10/2013	
T-7 Commitment for Title Ins (2-1-10)	Title Reports	9/10/2013	
T-7 Commitment for Title Ins (2-1-10)	Title Reports	9/10/2013	

NOTES:

- The selected document is opened with view and delivery options displayed. MS Word, PDF and TIFF file formats can be viewed in this section.
- You can also continue to add Notes and attach documents to your order.

Download

1. Check the box(es) next to the **Document Name** you want to Download
2. Select a **Download Format** option:
   a. Merged into one PDF file
   b. Grouped into one ZIP file
3. Click **Download**



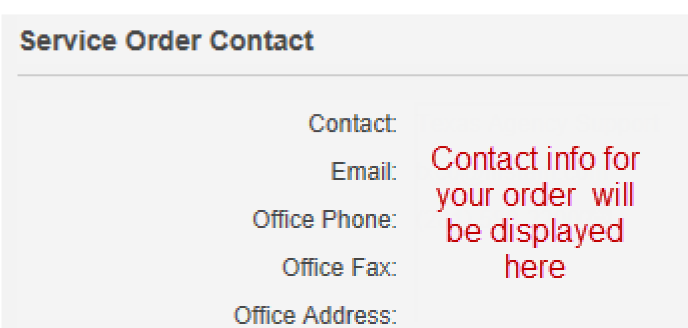
NOTES:

- The selected PDF file is downloaded with an option to open or save the document to your computer. If you open the document, additional delivery options will be available.
- The selected Grouped Zip file is downloaded with an option to open or save the zipped folder to your computer.
- You can continue to add Notes and Attach Documents to your order if needed.

Support

To get support for your order, contact information will be supplied at the bottom of each order.

For all support needs regarding your specific order, your **Service Order Contact** for each order will be located at the bottom of your AgentNet file in the **Service Orders** tab.



For all technical support needs in AgentNet, you may contact agencysupport@firstam.com