Creating a Policy Jacket in AMS2

1. After you log in you will be viewing the **WFG File Management** screen.You can select the desired agency from the dropdown at this point <u>or</u> on the Generate Policy Jacket screen which appears next.
   a. Hover over the **Create Tab**, select **Jacket** to display the **Generate Policy Jacket** screen.

2. If an agency was not selected at the previous step on the WFG File Management screen, select one in the Agency Details dropdown now.
   a. Fields in the **Property Information**, **Policy Jacket** and **Delivery Options** sections are only enabled after the bold and required File Number and Property Type are entered.
      *Click the plus or minus sign on each section to expand or close that section.

a. When simultaneous policy jackets need to be generated click the Issue Simultaneous Policy checkbox to display multiple Policy Jacket sections (Exhibit A), else the screen will remain with a single Policy Jacket section (Exhibit B). Enter the Property Information.

Exhibit A

Exhibit B

i. **Property Information Section:** Fields in bold are required. To change the city or county name do the following:
1. City: To change the city name where the city name needed is not available after a valid zip code is entered, click the Edit icon next to the City field to remove the selected city and type in the new city name.
2. County: To change the county name where the county name needed is not available after a valid zip code and city is entered, click the Edit icon next to the County field to remove the defaulted county and type in the new county name.

b. **Policy Jacket Section(s):** Select a Jacket Type and the available data entry fields will be displayed for the selected Jacket Type; fields in bold are required.

i. **Include Owner's Policy or Include Loan Policy checkboxes:** If the Issue Simultaneous Policy checkbox was selected, each Policy Jacket section will display an Include Owner's Policy or Include Loan Policy checkbox. The checkbox can be selected to add additional loan or owner policy jacket selections in the Jacket Type dropdown.

ii. **SIMO Rate Applied:** Select this checkbox to indicate the simultaneous rate being charged for the loan policy.
*There is no current validation for this field so you may disregard this step.

iii. **Addendum button:**
1. Only available on Short Form Loan jacket types.
2. Select Cancel button to close the Addendum screen.
3. Select Done button to include the addendum language in the policy jacket pdf file.
4. A check mark on the Addendum button indicates something was typed in the Addendum window.
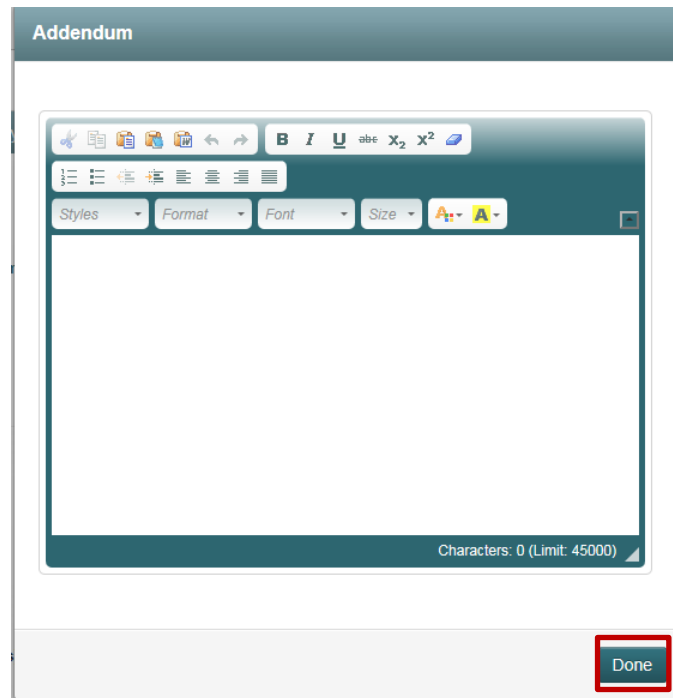
iv. **Endorsements button:**
1. Select endorsements as needed for the jacket type. Selection of endorsements is especially important for the Short Form Loan policy jackets since they can be visible on the pdf file.
2. A count on the Endorsements button indicates the number of endorsements selected
3. The box next to the Endorsements button shows what endorsements were selected.
4. Select Cancel button to close the Endorsements screen.
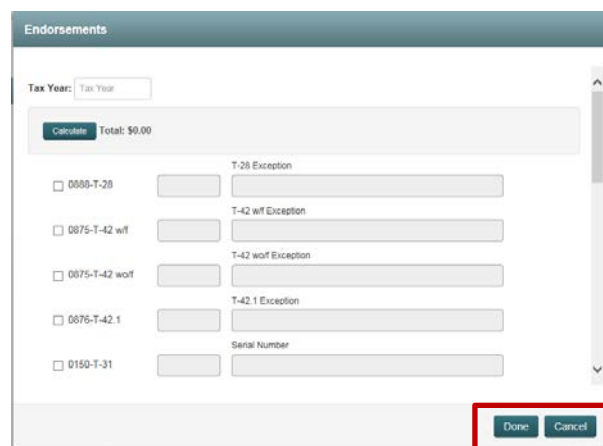
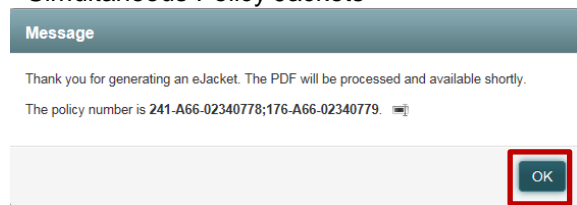c. **Delivery Options Section:** Entering email(s) or fax number(s)) for distribution of the policy jacket pdf file is optional.

d. **Cancel button** when selected will close the Generate Policy Jackets screen and will not save any of the entered information.

e. **Generate Jacket** button when selected will process the policy jacket and generate a pdf file.

   i. A generation message is displayed, click OK.

Single Policy Jacket

Message
Thank you for generating an eJacket. The PDF will be processed and available shortly.
The policy number is **172-A66-02340777**.
OK

Simultaneous Policy Jackets

Message
Thank you for generating an eJacket. The PDF will be processed and available shortly.
The policy number is **241-A66-02340778;176-A66-02340779**.
OK
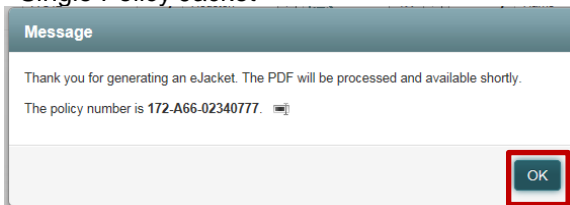
f. You will be navigated to the **WFG File Services** screen, **Jackets** tab.
   i. The policy jacket(s) generated will be displayed on the Jackets tab on the lower portion of the screen and you will see that the file was automatically generated by the system on the top portion of the screen.
   ii. A policy jacket is fully completed when the Policy Status is Assigned and the Actions [Edit, Send, View Void] are enabled.

WFG File Services   Search Existing Files

File Information

Agency Details: Test agent 2 (11636.01.01.31.TX / Portland, OR)

File Status: Open   File Number: TestAgent2TX1   Property State: TEXAS

Property Information

Property Type: Residential

Address 1:   111 Test Avenue

Address 2:   Suite 150

Zip: 77042   City: Houston   State: TX   County: Harris

Short Legal:

[Edit] [Save] [Cancel]

| File Info | CPL | Jackets | OTL |

Jackets   Void All

	Jacket Type	Policy Status	Policy Number	Policy Date	Actions
+	T-2R (2014) Short Form Residential Loan Policy	Assigned	172-A66-02340777	08/30/2016	Edit	Send	View	Void

[Generate New Jacket]

3. If an additional policy jacket is needed on the existing file whether simultaneous or not, click the **Generate New Jacket** button to display the **Generate Policy Jacket** screen again and repeat the above steps.

   a. Notice the Property Information entered previously will prepopulate. Select a Jacket Type and a notification message will be displayed indicating there is an existing policy jacket on the file.

   i. **Cancel button:** Click to exit the Generate Policy Jacket screen and return to the Jackets tab on the file.

ii. **Proceed button:** Click to continue creating a new jacket and a confirmation message will display.
1. **No:** Click to continue creating the non-simultaneous policy jacket.
2. **Yes:** Click to continue creating a simultaneous policy jacket.
   a. The Generate Policy Jacket screen will refresh and the Policy Jacket(s) already generated on the file will display as read only on the screen, click the plus sign to expand the Policy Jacket section to review as needed (Exhibit C).

Exhibit C

b. When all information is entered for the new policy jacket and the Generate Jacket button is clicked, modal message is displayed and the OK button is clicked, the **WFG File Services** screen**, Jackets** tab will again be displayed.

ii. The policy jacket generated will be displayed on the Jackets tab on the lower portion of the screen.

iii. A policy jacket is fully completed when the Policy Status is Assigned and the Actions [Edit, Send, View Void] are enabled.