

## **WFG Agent – Agency Management System (AMS2)**

### **User Job Aid**

Version 1.0

Revised 4.12.2017

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## 1 AMS2 Introduction

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WFG Agent AMS2 is the revamped, supercharged and flexible Agent Management System which provides you with three possibilities for creating your CPL and eJacket services.

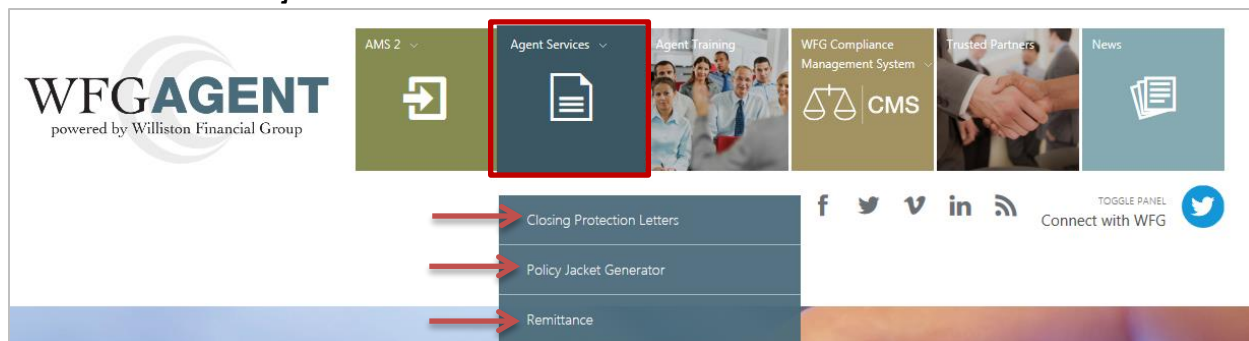
- 1) You can create a CPL, eJacket or OTL Request as a stand-alone function in AMS2. Once the CPL, Jacket or OTL Request is generated, a new file record will be created, allowing you the option to create further services from the new file.  
***[Refer to Section 3 for CPL, Section 4 for Policy Jacket (eJacket), Section 5 for OTL Request]***
- 2) You can create a file record now and add services at a later time. ***[Refer to Section 9 for File Creation, Section 3 for CPL, Section 4 for Policy Jacket (eJacket), Section 5 for OTL Request for adding Services]***
- 3) You can still utilize your production system to create eJackets and/or CPLs. The only time you would need to access AMS2 is to create an OTL Request or cancel the file record and the services that you created from your production system. ***[Refer to Section 5 for OTL Request, Section 11 for Update File Record]***

## 2 AMS2 General Information

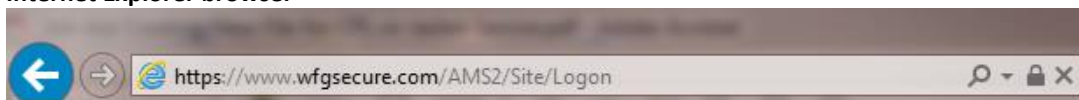
### 1.01 Navigate to WFG Agent AMS2

From the **WFG Agent** website <https://wfgagent.com/> hover over **Agent Services** box and select a service option (e.g. Closing Protection Letters, Policy Jacket Generator, Remittance) or open an internet web browser tab and enter <https://www.wfgsecure.com/AMS2/>.

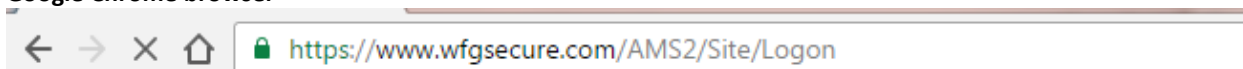
- Internet Explorer 11 or higher and Google Chrome are the two recommended browsers
- Navigation using either option will display the **WFG AGENT Secure Account Sign In** screen [Refer to Subsection 1.02 in Section 2]



#### Internet Explorer browser



#### Google Chrome browser



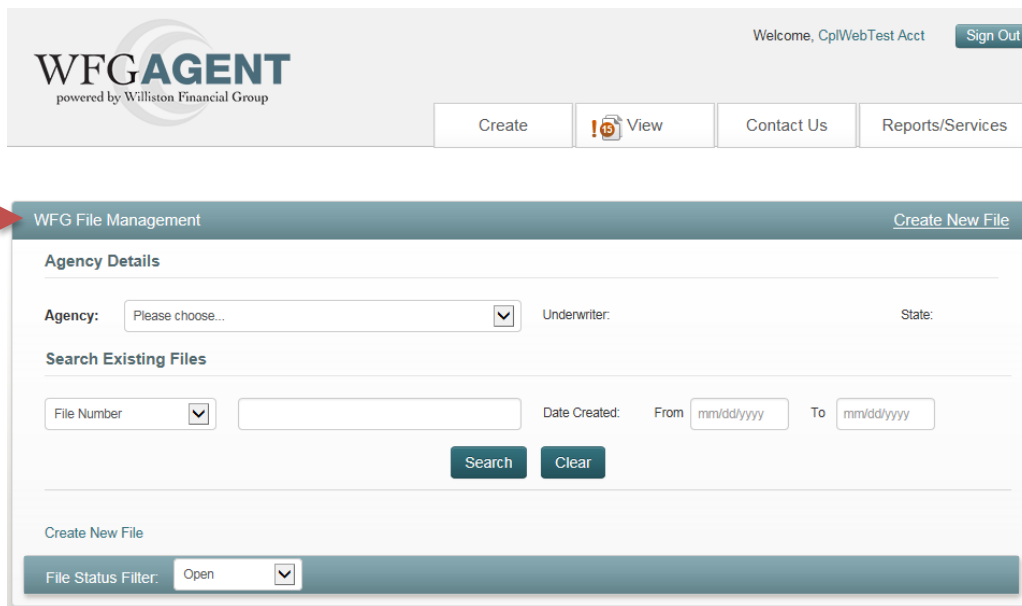
### 1.02 Sign into AMS2

After navigating to AMS2 you will be viewing the **WFG AGENT Secure Account Sign In** screen. Enter your login credentials {User Name / Password} and click **Sign In button** to be navigated to the **WFG File Management** home screen

Figure 1 - WFG AGENT Secure Account Sign In Screen

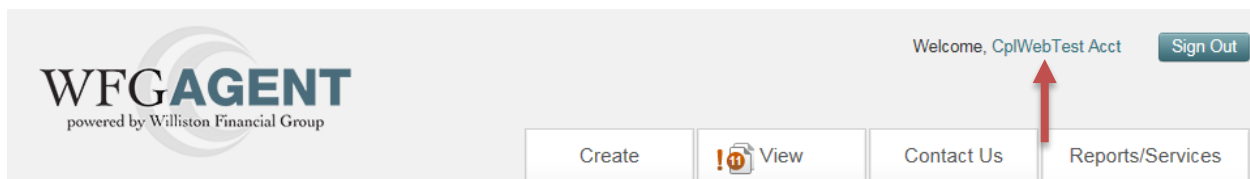
A screenshot of the 'Secure Account Sign In' screen. The title 'Secure Account Sign In' is at the top left, with a red arrow pointing to it. Below the title is a large 'Sign In' heading. To the left of the login fields is a padlock icon. The 'User Name' field is a text input box. Below it is the 'Password' field, which is a text input box with a small eye icon to toggle visibility. Below the password field is a checkbox labeled 'Remember Username' and a link labeled 'Forgot Password?'. At the bottom center is a 'Sign In' button, which is highlighted with a red box.

Figure 2 - WFG File Management Screen



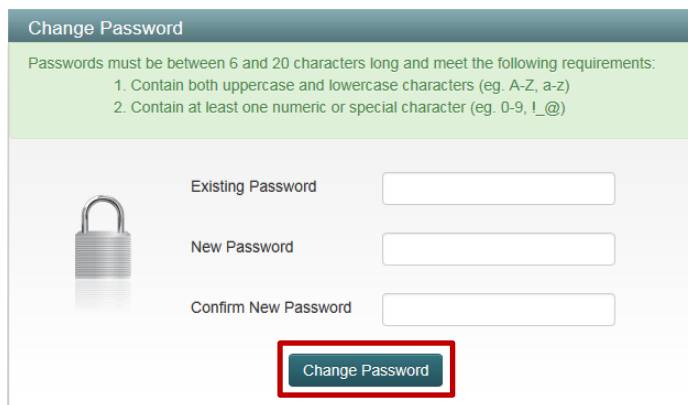
The screenshot shows the WFG AGENT File Management interface. At the top, the WFG AGENT logo is on the left, and the user is logged in as 'CplWebTest Acct' with a 'Sign Out' button on the right. Below the header is a navigation bar with 'Create', 'View' (with a folder icon), 'Contact Us', and 'Reports/Services' buttons. The main content area is titled 'WFG File Management' and includes a 'Create New File' link. It features an 'Agency Details' section with a dropdown for 'Agency' and fields for 'Underwriter' and 'State'. Below this is a 'Search Existing Files' section with a 'File Number' dropdown, a text input field, and 'Date Created' filters for 'From' and 'To' with date pickers. 'Search' and 'Clear' buttons are provided. At the bottom, there is a 'Create New File' section with a 'File Status Filter' dropdown set to 'Open'.

## 1.03 Change Existing Password



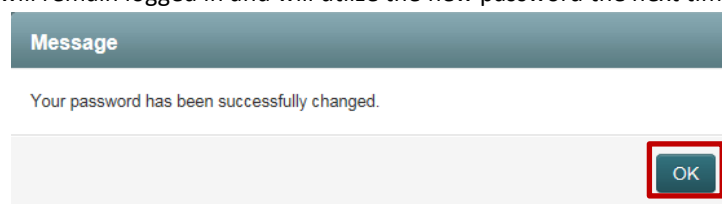
This screenshot shows the top portion of the WFG AGENT interface. The WFG AGENT logo is on the left. On the right, the user is logged in as 'Welcome, CplWebTest Acct' with a 'Sign Out' button. Below the header is a navigation bar with 'Create', 'View' (with a folder icon), 'Contact Us', and 'Reports/Services' buttons. A red arrow points to the 'Welcome, CplWebTest Acct' text, indicating where to click to change the password.

1. Click on your name hyperlink next to Welcome at any time to change your password. When directed to the **Change Password** screen enter Existing Password, New Password and Confirm New Password, click **Change Password** button



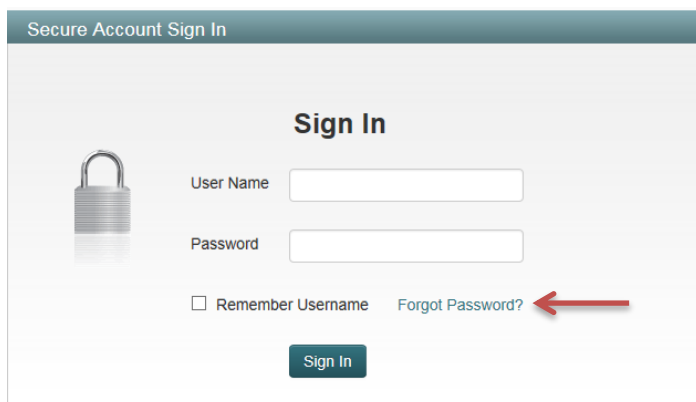
The screenshot shows the 'Change Password' screen. It has a title bar 'Change Password' and a green box with password requirements: 'Passwords must be between 6 and 20 characters long and meet the following requirements: 1. Contain both uppercase and lowercase characters (eg. A-Z, a-z) 2. Contain at least one numeric or special character (eg. 0-9, !\_@)'. Below this are three input fields: 'Existing Password', 'New Password', and 'Confirm New Password'. A red padlock icon is to the left of these fields. At the bottom, there is a 'Change Password' button highlighted with a red box.

- a. Click **OK** button on notification message indicating that your password was successfully changed. You will remain logged in and will utilize the new password the next time you log in



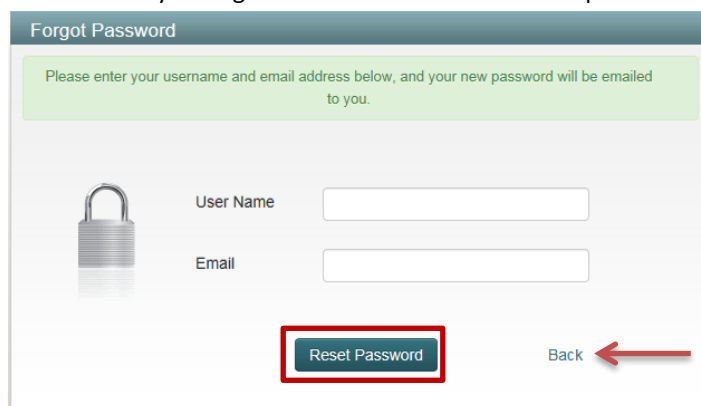
The screenshot shows a notification message box with a title bar 'Message'. The message text is 'Your password has been successfully changed.' At the bottom right of the message box is an 'OK' button highlighted with a red box.

1. Click the **Forgot Password?** hyperlink on the **WFG AGENT Secure Account Sign In** screen at any time to request a password reset, you will be navigated to the **Forgot Password** screen



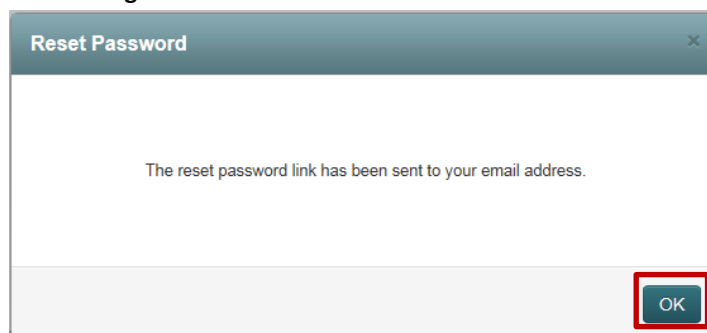
The image shows the 'Secure Account Sign In' screen. It has a title bar 'Secure Account Sign In' and a main heading 'Sign In'. On the left is a padlock icon. To the right of the icon are two input fields: 'User Name' and 'Password'. Below these fields is a checkbox labeled 'Remember Username' and a blue hyperlink 'Forgot Password?' with a red arrow pointing to it. At the bottom is a 'Sign In' button.

2. On the **Forgot Password** screen
  - a. Click **Back** hyperlink to return to the **WFG AGENT Secure Account Sign In** screen
  - b. Click **Reset Password** button after entering User Name (login credentials) and primary Email address associated to your log in credentials to submit the request



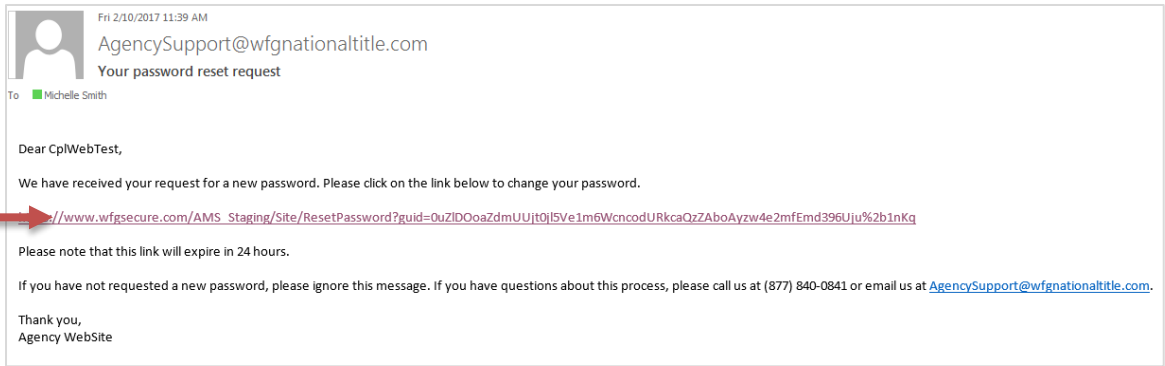
The image shows the 'Forgot Password' screen. It has a title bar 'Forgot Password' and a green message box that says 'Please enter your username and email address below, and your new password will be emailed to you.' Below this are two input fields: 'User Name' and 'Email'. To the left of these fields is a padlock icon. At the bottom are two buttons: 'Reset Password' (highlighted with a red box) and 'Back' (with a red arrow pointing to it).

- i. Click **OK** button on reset password notification message indicating that a reset password link has been sent to your email address, you will automatically be returned to the **WFG AGENT Secure Account Sign In** screen



The image shows a 'Reset Password' notification message box. It has a title bar 'Reset Password' with a close button 'x'. The main text says 'The reset password link has been sent to your email address.' At the bottom right is an 'OK' button (highlighted with a red box).

2. Check the provided email box for an email with the subject of "Your password reset request" and click the provided link. You will be navigated to the **Change Password** screen
  - Password reset link will expire in 24 hours **or** when the password is changed



3. On the **Change Password** screen

- a. Enter the new password in New Password and enter same password in Confirm New Password, click **Change Password button**
  - i. As soon as the Change Password button is clicked an email with the subject of "Password reset request" will be sent indicating your email was used to reset the password, follow the instructions provided (Figure 3)

**Change Password**

Passwords must be between 6 and 20 characters long and meet the following requirements:

1. Contain both uppercase and lowercase characters (eg. A-Z, a-z)
2. Contain at least one numeric or special character (eg. 0-9, !\_@)

New Password

Confirm New Password

**Change Password**

- b. Click **OK button** on notification message indicating that your password was successfully changed. You will be navigated to the **WFG AGENT Secure Account Sign In** screen where you will use your new password to log in

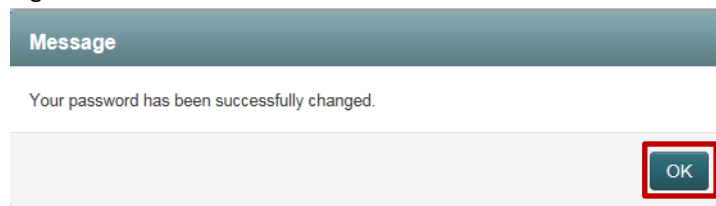
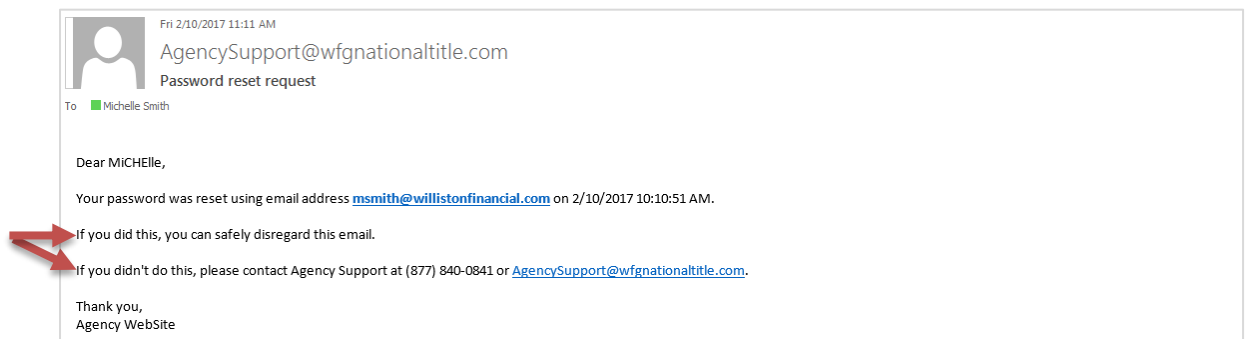


Figure 3



## 1.05 Navigate to AMS Home Screen (WFG File Management)

1. Hover over and click on the **WFG AGENT** logo at any time from any screen to return to to the **WFG File Management** home screen (Figure 4)
  - Note the pointer will turn into a hand when you hover over the logo

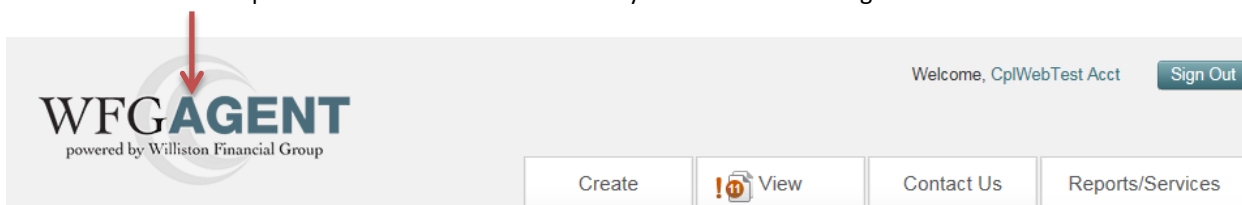


Figure 4 - WFG File Management Screen

A screenshot of the 'WFG File Management' screen. A red arrow points to the 'WFG File Management' header on the left. The header also contains a 'Create New File' link on the right. Below the header is the 'Agency Details' section with a dropdown for 'Agency' (set to 'Please choose...'), 'Underwriter', and 'State' fields. Below that is the 'Search Existing Files' section with a 'File Number' dropdown, a text input field, 'Date Created' with 'From' and 'To' date pickers (set to 'mm/dd/yyyy'), and 'Search' and 'Clear' buttons. At the bottom is a 'Create New File' link and a 'File Status Filter' dropdown set to 'Open'.

2. Click the **Search Existing Files** link whenever on the **WFG File Services** screen to return to the **WFG File Management** home screen (Figure 4)

A screenshot of the 'WFG File Services' screen. A red arrow points to the 'Search Existing Files' link in the top right header. The main content area is titled 'File Information' and contains several sections. 'Agency Details' has a dropdown set to 'Test agent 2 (11636.01.01.31.TX / Portland, OR)'. 'File Status' is a dropdown set to 'Open', 'File Number' is a text field with 'TestAgent2TX32', and 'Property State' is 'TEXAS'. 'Property Information' includes 'Property Type' (dropdown set to 'Residential'), 'Address 1' and 'Address 2' (text fields), 'Zip' (text field), 'City' (text field with a location icon), 'State' (dropdown set to 'TX'), 'County' (dropdown set to 'Please choo' with a location icon), and 'Short Legal' (text field with 'test'). At the bottom are 'Edit', 'Save', and 'Cancel' buttons.

## 1.06 Contact WFG for Assistance – After AMS2 Login

1. Once logged into AMS2 hover over the **Contact Us** tab, select **Feedback** to display the **Contact WFG** screen
  - The reasons for contacting WFG include, but are not limited to the following: Final Policy Request, Agent/Agency Verification, Agency Information Update, Licensing and Appointment Request, Policy Form Request, Rate Manual Request, Rate Calculator Issue, CPL and Jacket Generator Issue, Underwriting Question
2. First Name, Last Name and Email set up for the logged in user will populate on the screen, continue to enter the bold required fields
  - a. **Cancel button**: Click at any time to return to the **WFG File Management** home screen, Agency Support will not be notified of the assistance request
  - b. **Send button**: Click to submit your feedback to WFG

**WFGAGENT**  
powered by Williston Financial Group

Welcome, CplWebTest Acct [Sign Out](#)

Create [View](#) **Contact Us** Reports/Services

### Contact WFG

#### We Value Your Feedback

Please give us your thoughts on our web site, our service, and/or our people. We welcome your suggestions on what we can do to help take time and cost out of the real estate transaction.

For WFGAgent Services support please call 1.877.840.0841 or email Agency Support at AgencySupport@wfgnationaltitle.com

For all other issues or inquiries, please complete the form below:

First Name: CplWebTest

Last Name: Acct

Agency/Firm:

Email: xxxxx@wfgnationaltitle.com

Phone:

Reason for contacting us: Please choose... ▼

Please tell us how we can be of assistance:

#### Agency Support

Phone: 1.877.840.0841

Email: AgencySupport@wfgnationaltitle.com

Hours: Monday through Friday 8:00 AM to 5:00 PM PST

Address: 12909 SW 68th Pkwy, Suite 350  
Portland, OR 97223

**Send** **Cancel**

- i. Click **OK button** on notification message indicating that your feedback was successfully sent

**Message**

Your Feedback has been sent. Thank You.

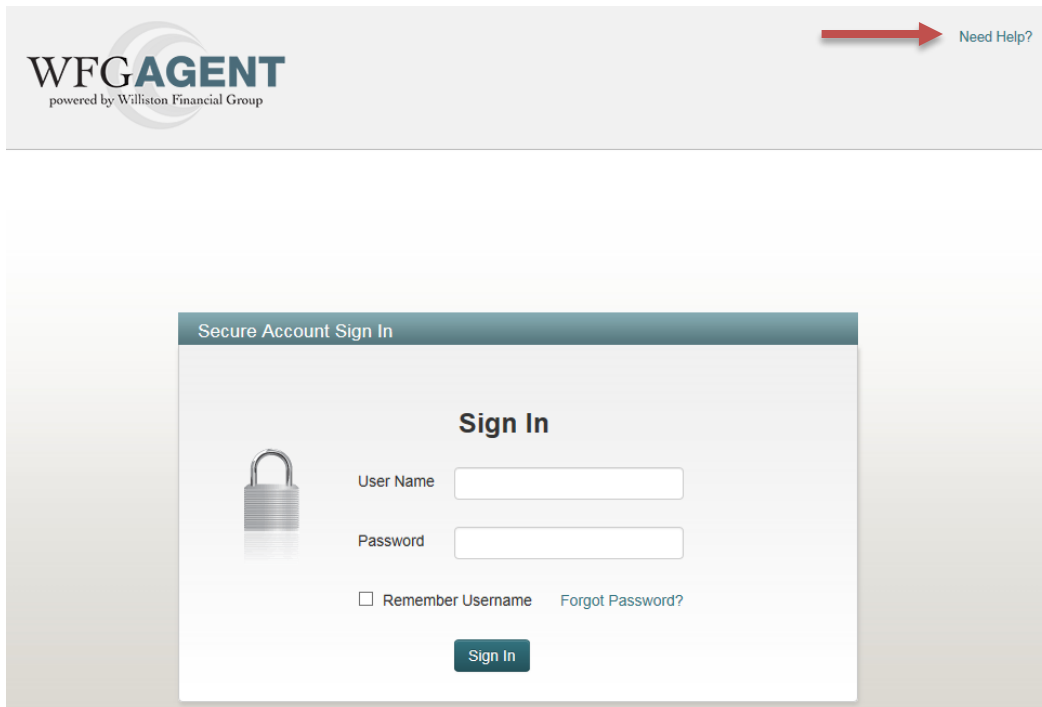
**OK**



## 1.07 Contact WFG for Assistance – Before AMS2 Login

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1. If you need assistance from WFG before you login to AMS2 navigate to the **WFG AGENT Secure Account Sign In** screen *[Refer to Subsection 1.01 and 1.02 in Section 2]* and click **Need Help?** hyperlink to display the **Feedback** screen
  - The reasons for contacting WFG include, but are not limited to the following: Password Reset/User Unlock, Final Policy Request, Agent/Agency Verification, New User Access Request, Interested in Becoming an Agent



2. On the **Feedback** screen enter all required fields indicated in Bold, click the I'm not a robot checkbox in the reCaptcha box and follow the instructions provided
  - Once a green checkmark is displayed in the ReCaptcha box you can continue to the next step
3. Once all required fields are entered and ReCaptcha is approved on the **Feedback** screen
  - a. **Cancel button:** Click at any time to return to the **WFG File Management** home page, Agency Support will not be notified of the assistance request
  - b. **Send button:** Click to submit your feedback to WFG

## We Value Your Feedback

Please give us your thoughts on our web site, our service, and/or our people. We welcome your suggestions on what we can do to help take time and cost out of the real estate transaction.

For WFGAgent Services support please call (877) 840-0841 or email Agency Support at [AgencySupport@wfgnationaltitle.com](mailto:AgencySupport@wfgnationaltitle.com)

For all other issues or inquiries, please complete the form below:

Name:

Company:

Email:

Phone:

Please select topic:

Subject:

Please tell us how we can be of assistance:



☐ I'm not a robot



## Agency Support

Phone: (877) 840-0841

Email: [AgencySupport@wfgnationaltitle.com](mailto:AgencySupport@wfgnationaltitle.com)

Hours: Monday through Friday 8:00 AM to 5:00 PM PST

Address: 12909 SW 68th Pkwy, Suite 350  
Portland, OR 97223

Send

Back

## 3 Closing Protection Letter Creation

### 1.08 Create New Closing Protection Letter

- After you login in you will be viewing the **WFG File Management** home screen. You can select the desired agency from the dropdown at this point or on the Generate Closing Protection Letter screen which appears next. Note an Agency may default for you if your user login account was established with access to only a single account number
  - Hover over the **Create** tab, select **CPL** to display the **Generate Closing Protection Letter** screen

The screenshot shows the WFG AGENT File Management interface. At the top, there's a header with the WFG AGENT logo and a 'Welcome, CplWebTest Acct' message. Below the header, there's a navigation bar with 'Create', 'View', 'Contact Us', and 'Reports/Services' tabs. The 'Create' tab is highlighted with a red box, and a dropdown menu shows 'CPL' selected. Below the navigation bar, there's a 'WFG File Management' section with a 'Create New File' link. The 'Agency Details' section shows 'Test agent 2 (11636.01.01.31.TX / Portland, OR)' selected. The 'Search Existing Files' section has input fields for 'File Number', 'Date Created', and a 'Search' button. The 'Create New File' section has a 'File Status Filter' dropdown set to 'Open'.

- If an agency was not selected in the previous step on the **WFG File Management** screen, select one in the Agency Details dropdown on the **Generate Closing Protection Letter** screen now to expand the screen; fields in bold are required

The screenshot shows the 'Generate Closing Protection Letter' screen. The 'Agency Details' dropdown is highlighted with a red box, showing 'Please choose...' as the selected option. The 'Generate Letter' button is visible, and the 'Cancel' button is highlighted with a red box.

- Once the Agency is selected and the screen expanded (Figure 5), a default type of closing protection letter (e.g. Transaction, Lender, Seller, Buyer, etc.) will populate in the **Letter Type** dropdown based upon the property state and the available data entry fields will be displayed for the selected letter type
  - Hide Agency Info on Letter? checkbox:** When unchecked the name and address information of the agency selected in Agency Details will display on the closing protection letter pdf generated. When checked the name and address information of the agency selected in Agency Details will not display on the closing protection letter pdf generated
  - View link:** Click link as needed to expand the Agency Details contact information section for review
    - Click **Hide link** to close the Agency Details contact information section (Figure 6)
  - Letter Type:** After the default letter type is populated you can choose a new letter type if there are more than one type available in the property state, click the dropdown arrow to review options. If letter type is updated the available data entry fields will be displayed for the selected letter type

- **File Number:** The file number entered will be verified against other file number records saved for the Agency selected. If an existing matching file number is located the property type and property information will default from the file
  - File numbers will not be considered a match if there are spaces or additional characters (e.g. Test 123 is not the same file number as Test123 or Test123 is not the same as Test123a)
- **Property Type:** After the required file number is entered and the field is tabbed out of the Property Type of Residential will default. Update the Property Type to Non-Residential as needed
- **Liability Amount:** Although Liability Amount field is not required, we encourage you to enter the potential liability amount if known. For amounts entered greater than \$3,000,000.00 an email will be automatically sent to a WFG Underwriter notifying them that a closing protection letter was submitted for that file number that was greater than the \$3,000,000.00 thresh hold for a high dollar value review

Figure 5 – Generate Closing Protection Letter Screen

The screenshot shows the 'Generate Closing Protection Letter' screen. Red arrows point to the following fields:

- Agency Details:** A dropdown menu showing 'Test agent 2 (11636.01.01.31.TX / Portland, OR)' and a 'View' link.
- Letter Type:** A dropdown menu showing 'Lender'.
- File Number:** A text input field.
- Property Type:** A dropdown menu showing 'Please choose...'.
- Liability Amount:** A text input field showing '\$ 0.00'.
- Property Information:**
  - Address 1:** A text input field.
  - Address 2:** A text input field.
  - Zip:** A text input field.
  - City:** A dropdown menu showing 'Please choose...'.
  - State:** A dropdown menu showing 'TX'.
- Additional Letter Information:**
  - Loan Number:** A text input field.
  - Borrower/Buyer Name(s):** A text input field.
  - Seller Name(s):** A text input field.
  - DBA or Care of:** A text input field.
  - Transaction Limit:** A text input field showing '\$ 0.00'.
- View Frequently Used Lenders Only:** A checked checkbox.
- Lender:** A dropdown menu showing 'Please choose...'.
- Delivery Options:**
  - Include My Email Address:** An unchecked checkbox.
  - Email Letter To:** A text input field with a note: 'Please use commas or semicolons to separate multiple email addresses.'
  - Fax Letter To:** A text input field with a note: 'Please use commas or semicolons to separate multiple fax numbers.'

At the bottom of the screen, there are two buttons: 'Generate Letter' and 'Cancel'.

Figure 6 – Hide Link Displayed after View Link was Clicked

Generate Closing Protection Letter

☐ Hide Agency Info on Letter?

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

Agency Name: Test agent 2

Address 1: 1234 South West 68th Avenue

Address 2:

City: Portland

State: TX Zip: 97232

Phone: 123-456-7890 Fax: 123-456-7890

4. Enter Property Information, Additional Letter Information, Lender, Approved Attorney (if displayed), Covered Parties (if displayed) and Delivery Options (Figure 5)
  - a. **Property Information Section:** Fields in bold are required
    - i. The city name will default after a valid zip code is entered when there is only one associated city name. If there is more than one associated city name to the zip code entered Please Choose... will display in the dropdown for selection (Figure 7)
      1. If the city name needed is not available in the dropdown after a valid zip code is entered, you can change the city name as needed
        - o Click the **Edit icon** next to the City field to remove the selected city (Figure 8) and type in the new city name (Figure 9). To return the original city value selected click the **Edit icon** again (Figure 10)

Figure 7 – City Field Not Prepopulated Due to Zip Code Associated to Multiple Cities

Property Information:

**Address 1:** 123 Test Avenue

Address 2: Suite 150

**Zip:** 77045 **City:** Please choose **State:** TX

Figure 8 – Edit Icon for City

Property Information:

**Address 1:** 111 Test Avenue

Address 2: Suite 150

**Zip:** 77042 **City:** | **State:** TX

Figure 9 – City Field Turns to Text Box to Enter Preferred City Name

Property Information:


**Address 1:** 111 Test Avenue

Address 2: Suite 350

**Zip:** 77042 **City:** Test City **State:** TX

Figure 10 – Edit Icon for City Clicked to Populate Original City Name

Property Information:

<b>Address 1:</b>	111 Test Avenue		
Address 2:	Suite 150		
<b>Zip:</b>	77042	<b>City:</b> Houston	 <b>State:</b> TX

- b. **Additional Letter Information Section:** Fields in bold are required
- c. **Lender Section:** Fields in bold are required
  - Select or deselect the **View Frequently Used Lenders Only** checkbox to increase or decrease the list of available lenders to select from
  - If the needed lender is not visible in the Lender dropdown, select **No Matching Lender** to enter the needed lender information; fields in bold are required
    - The new lender will be added and the closing protection letter can be processed
  - Select **Email** checkbox to include the lender email address (if populated) in the Email Letter To field in the Delivery Options section.
    - An email will automatically be sent to the lender recipient upon successful generation of the closing protection letter which provides the closing protection letter pdf document
  - Select **Fax** checkbox to include the lender fax number (if populated) in the Fax Letter To field in the Delivery Options section
    - A fax will automatically be sent to the lender recipient upon successful generation of the closing protection letter which provides a copy of the generated closing protection letter
  - Select or deselect the **Add Lender to Frequently Used List** checkbox to add or remove a lender from the list of available frequently used lenders

☒ View Frequently Used Lenders Only

**Lender:** Acopia, LLC. - 306 Northcreek Blvd. , Goodlettsville, TN 37072 - Michelle Smith - enisa.dugic@authoritypartners.com

<b>Company Name:</b>	Acopia, LLC.		
Attention:	Michelle Smith		
Mortgagee Clause:	Please choose...		
<b>Address 1:</b>	306 Northcreek Blvd.		
Address 2:			
<b>State:</b>	TENNESSEE	<b>Zip:</b>	37072
<b>City:</b>	Goodlettsville	<b>Phone:</b>	
		<b>Fax:</b>	8005070164
<b>Email:</b>	enisa.dugic@authoritypartners.com		
<input type="checkbox"/> Include in Delivery Options <input type="checkbox"/> Email <input type="checkbox"/> Fax			
<input checked="" type="checkbox"/> Add Lender to Frequently Used List			

- d. **Approved Attorney Section:** Fields in bold are required. Option only available in select states
  - Select or deselect the **View Frequently Used Attorneys Only** checkbox to modify the list of available attorneys to select from
  - Click **Request New button** (if displayed) to request the addition of a new attorney; complete and submit the Request New Attorney form
    - An email will be sent for review by WFG staff to approve the attorney before the closing protection letter can be processed

- If Request New button is not displayed, select **New Attorney Request** in the Attorney dropdown; complete and submit the Request New Attorney form
  - The new attorney will be added and the closing protection letter can be processed
- Select **Email** checkbox to include the attorney email address (if populated) in the Email Letter To field in the Delivery Options section.
  - An email will automatically be sent to the attorney recipient upon successful generation of the closing protection letter which provides the closing protection letter pdf document
- Select **Fax** checkbox to include the attorney fax number (if populated) in the Fax Letter To field in the Delivery Options section
  - A fax will automatically be sent to the attorney recipient upon successful generation of the closing protection letter which provides a copy of the generated closing protection letter
- Select or deselect the **Add Attorney to Frequently Used List** checkbox to add or remove the attorney from the list of available frequently used attorneys

☐ View Frequently Used Attorneys Only

**Attorney:** Edwin Don Bowling - Bowling & Associates, LLC - 4549 Lemon Street, Acworth, GA 30101 Request New

**Full Name:** Edwin Don Bowling

**Law Firm Name:** Bowling & Associates, LLC

**Address 1:** 4549 Lemon Street

**Address 2:** Suite 100

**State:** GEORGIA **Zip:** 30101

**City:** Acworth

**Phone:** 6785694650 **Fax:** 8005070164

**Email:** enisa.dugic@authoritypartners.com

☐ Include in Delivery Options ☐ Email ☐ Fax

☐ Add Attorney to Frequently Used List

**Delivery Options:** ☐ Include My Email Address

- e. **Covered Parties Section:** Option only available in select states
- Click **Seller Name** checkbox and the seller name entered in the Additional Letter Information section will automatically populate in the seller name field. You can edit the seller name here or if nothing is populated enter the Seller Name information
    - Once the checkbox is clicked additional fields to enter the seller address will be displayed (Optional) and will not print on the closing protection letter
    - The seller name(s) entered next to the checkbox is what will print on the closing protection letter not the seller name entered in the Additional Letter Information section
  - Click **Buyer Name** checkbox and enter the Buyer Name information here
    - Once the checkbox is clicked additional fields to enter the buyer address will be displayed (Optional) and will not print on the closing protection letter
    - The buyer name(s) entered next to the checkbox is what will print on the closing protection letter
  - Click **Borrower Name** checkbox and the borrower/buyer name entered in the Additional Letter Information section will automatically populate in the borrower name field. You can edit the borrower name here or if nothing is populated enter the Borrower Name information here
    - Once the checkbox is clicked additional fields to enter the borrower address will be displayed (Optional) and will not print on the closing protection letter

- The borrower name(s) entered next to the checkbox is what will print on the closing protection letter not the borrower/buyer name(s) entered in the Additional Letter Information section
- Click **Lender Name** checkbox and the lender selected in the Lender section will automatically populate in the lender field. If a lender was not selected in the Lender section first do not manually enter a lender name here, select it in the Lender section so it will populate instead
  - When clicked the lender address will pull from the lender selected in the Lender section and will print on the closing protection letter, therefore the additional fields for address entry are not needed
  - The lender name populated next to the checkbox is what will print on the closing protection letter
    - If the Lender Name checkbox is not checked and the Seller Name, Buyer Name and/or Borrower Name checkboxes are also not checked, the lender name and associated address selected in the Lender section will automatically print on the closing protection letter by default
  - Lender name and address will not print at all on the closing protection letter if at least one of the Seller Name, Buyer Name and/or Borrower Name checkboxes are checked

Covered Parties:

<input type="checkbox"/> Seller Name:	<input type="text"/>
<input type="checkbox"/> Buyer Name:	<input type="text"/>
<input type="checkbox"/> Borrower Name:	<input type="text"/>
<input type="checkbox"/> Lender Name:	<input type="text"/>

- f. **Delivery Options Section:** Entering email(s) or fax number(s) for distribution of the closing protection letter is optional
- Click **Include My Email Address** checkbox to default your primary email address in the Email Letter To field
  - When email and/or fax is entered, an email with pdf attachment of the closing protection letter and/or fax with a copy of the closing protection letter will automatically be sent to the recipient(s) upon successful generation of the closing protection letter document
  - An email and/or fax can be sent at a later time after the closing protection letter has been successfully generated **[Refer to Subsection 1.016 in Section 6]**
5. Click **Cancel button** at any time to close the **Generate Closing Protection Letter** screen and any data entered will not be saved
6. Click **Generate Letter button** to process the closing protection letter pdf file and save the entered data
- a. If there are any errors a validation flag will display next to or below the errored field(s) that briefly describe the error; all errors must be fixed to continue

**This field is required.**

- b. If there are no errors a generation message is displayed, click **OK button**

**Message**

Thank you for generating a Closing Protection Letter. The PDF will be processed and available shortly.

The letter number is 7DA054A1. 📎

OK



7. While the closing protection letter is processing, you will automatically be navigated to the **WFG File Services** screen, **CPL** tab
  - The closing protection letter being generated will display on the **CPL** tab on the lower portion of the screen and can be reviewed by clicking the View action **[Refer to Subsection 1.017 in Section 6]**
  - If the file record did not previously exist it will automatically be established on the top portion of the screen using the information provided in the closing protection letter, including the Agency selected, file status, file number, property type and property address
  - If the file record did previously exist the closing protection letter will be added to it as a new service and any modifications to the property information will automatically be updated
  - When the closing protection letter is successfully generated the Actions [Cancel All, Cancel, Edit, Send, View] are enabled
  - The closing protection letter is available for validation and/or remittance when the Letter Status is Assigned
  - The closing protection letter is not available for validation and/or remittance when the Letter Status is An Error occurred **[Refer to Subsection 1.09 in Section 3]**

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: TestAgent2TX24    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

**Letters**

	Letter Type	Letter Status	Lender Name	Letter Number	Actions
+	Lender	Assigned	Acopia, LLC.	7DA054A1	<a href="#">Cancel</a>   <a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">View</a>

[Cancel All](#)

Generate New Letter

8. If an additional closing protection letter is needed on the current file, click **Generate New Letter** button on the lower portion of the **CPL** tab to display the **Generate Closing Protection Letter** screen once again. Note if only changes need to be made to the existing closing protection letter select the Edit action rather than creating a new one **[Refer to Subsection 1.015 in Section 6]**
  - a. On the **Generate Closing Protection Letter** screen notice the Agency Details, File Number, Property Type and Property Information entered previously and saved to the file record will prepopulate and a Letter Type will default; fields in bold are required

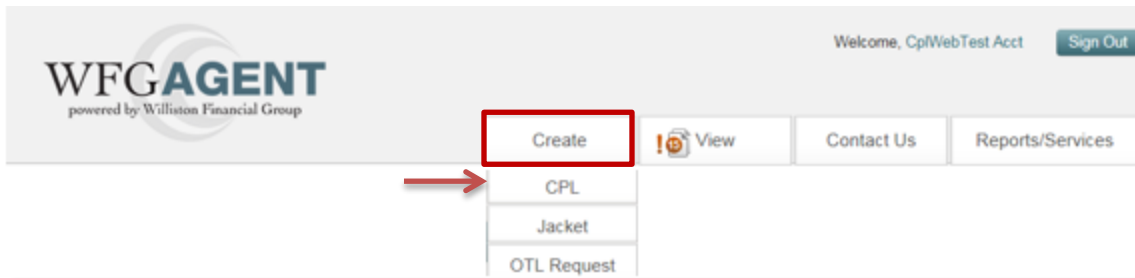
- i. **Letter Type:** Click the dropdown arrow to review available options. If letter type is updated the available data entry fields will be displayed for the selected letter type
- ii. **Property Type:** Verify the Property Type is correct for this file
  1. **Correct:** Enter closing protection letter information, click **Generate Letter button**
  2. **Not Correct:** Click **Cancel button** to return to the **WFG File Services** screen to update the incorrect property type on the file record *[Refer to Section 11]*. Once the property type is correct repeat the steps described in this section

The screenshot shows the 'Generate Closing Protection Letter' form. Red arrows point to the following elements:

- Agency Details:** A dropdown menu showing 'Test agent 2 (11636.01.01.31.TX / Portland, OR)' and a 'View' link.
- Letter Type:** A dropdown menu set to 'Lender'.
- File Number:** A text field containing 'TestAgent2TX24'.
- Property Type:** A dropdown menu set to 'Residential'.
- Liability Amount:** A text field showing '\$ 0.00'.
- Property Information:** A section containing:
  - Address 1:** '111 Test Avenue'
  - Address 2:** 'Suite 150'
  - Zip:** '77042'
  - City:** 'Houston' (with a dropdown arrow)
  - State:** 'TX' (with a dropdown arrow)
- Additional Letter Information:** A section with fields for:
  - Loan Number:**
  - Borrower/Buyer Name(s):**
  - Seller Name(s):**
  - DBA or Care of:**
  - Transaction Limit:** '\$ 0.00'
- Lender:** A dropdown menu set to 'Please choose...'.
- Delivery Options:** A checkbox for 'Include My Email Address'.
- Email Letter To:** A text field with a note: 'Please use commas or semicolons to separate multiple email addresses.'
- Fax Letter To:** A text field with a note: 'Please use commas or semicolons to separate multiple fax numbers.'

At the bottom, there are two buttons: **Generate Letter** and **Cancel**, both highlighted with red boxes.

9. If an additional closing protection letter is not needed on the current file, but you want to generate a closing protection letter for a different file, hover over the **Create** tab, select **CPL** and a confirmation message is displayed asking if you want to create a new closing protection letter for the current file



- a. **No button:** Click to display the **Generate Closing Protection Letter** screen again and create a new closing protection letter on a different file repeating the steps for creating a new closing protection letter
- b. **Yes button:** Click to display the **Generate Closing Protection Letter** screen and create a new closing protection letter on the current file repeating the steps for creating a new closing protection letter

**Confirmation**

Create New Closing Protection Letter for Current File?

Yes
No

## 1.09 Regenerate CPL Document in An Error Occurred Letter Status

1. If there was an issue generating the closing protection letter document on the file the Letter Status will display An Error occurred and a Regenerate link will display in the Actions on the lower portion of the **WFG File Services** screen, **CPL** tab (Figure 11)
  - a. Click **Regenerate link** to reprocess the closing protection letter document (Figure 11)
    - i. If the document failed to process again the Letter Status will remain An Error occurred and **Error | Regenerate link** will display in the Actions (Figure 11)
      1. Click **Error link** to display contact information for further assistance (Figure 12), click **OK button** to close the informational message and return to the **WFG File Services** screen, **CPL** tab

Figure 11 – WFG File Services Screen – CPL tab

File Info <span style="border: 1px solid red; padding: 2px;">CPL</span> Jackets OTL					
Letters					
	Letter Type	Letter Status	Lender Name	Letter Number	Actions
+	Transaction	An Error occurred	Finance of America Mortgage LLC, IS AOA/ATIMA	4E8928D1	Regenerate
+	Transaction	An Error occurred	Finance of America Mortgage LLC, IS AOA/ATIMA	2A876396	Error   Regenerate

Figure 12 - Issue with Regeneration of Closing Protection Letter Informational Message

**Message**

There is an issue trying to regenerate the selected Closing Protection Letter. For further assistance, contact Agency Support at [AgencySupport@wfgnationaltitle.com](mailto:AgencySupport@wfgnationaltitle.com) or (877) 840-0841 with the file number and letter number.

OK

## 4 Policy Jacket Creation

### 1.010 Create New Policy Jacket

1. After you login in you will be viewing the **WFG File Management** home screen. You can select the desired agency from the dropdown at this point **or** on the Generate Policy Jacket screen which appears next. Note an Agency may default for you if your user account was established with access to only a single account number
  - a. Hover over the **Create** tab, select **Jacket** to display the **Generate Policy Jacket** screen

The screenshot shows the WFG AGENT home screen. At the top, there's a header with the WFG AGENT logo and a 'Welcome, CplWebTest Acct' message with a 'Sign Out' button. Below the header, there's a navigation bar with 'Create', 'View', 'Contact Us', and 'Reports/Services'. The 'Create' tab is highlighted with a red box, and a dropdown menu is open showing 'CPL', 'Jacket', and 'OTL Request'. A red arrow points to the 'Jacket' option. Below the navigation bar, there's a 'WFG File Management' section with a 'Create New File' link. The 'Agency Details' section shows a dropdown menu for 'Agency' with 'Test agent 2 (11636.01.01.31.TX / Portland, OR)' selected. A red arrow points to this dropdown. The 'Underwriter' is 'WFG National Title Insurance Company' and the 'State' is 'TX'. Below this is a 'Search Existing Files' section with a 'File Number' dropdown, a text input field, and 'Date Created' fields for 'From' and 'To'. There are 'Search' and 'Clear' buttons. At the bottom, there's a 'Create New File' section with a 'File Status Filter' dropdown set to 'Open'.

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

The screenshot shows the 'Generate Policy Jacket' screen. The 'Agency Details' dropdown is selected with 'Test agent 2 (11636.01.01.31.TX / Portland, OR)'. Below this is the 'File Number' field and the 'Property Type' dropdown, which is currently set to 'Please choose...'. There is also a checkbox for 'Issue Simultaneous Policy'. Below these are three expandable sections: 'Property Information', 'Policy Jacket', and 'Delivery Options'. Each section has a plus/minus icon to its left. Red arrows point to each of these sections. The 'Property Information' section is expanded, showing 'Address 1', 'Address 2', and 'Zip' fields. The 'Policy Jacket' section is expanded, showing the 'Jacket Type' dropdown, which is currently set to 'Please choose...'. The 'Delivery Options' section is expanded, showing a plus sign icon. At the bottom of the screen, there are 'Generate Jacket' and 'Cancel' buttons.

- **File Number:** The file number entered will be verified against other file number records saved for the Agency selected. If an existing matching file number is located the property type and property information will default from the file
  - File numbers will not be considered a match if there are spaces or additional characters (e.g. Test 123 is not the same file number as Test123 or Test123 is not the same as Test123a)
- **Property Type:** After the required file number is entered and the field is tabbed out of the Property Type of Residential will default. Update the Property Type to Non-Residential as needed
- **Issue Simultaneous Policy checkbox:** This checkbox will allow for the generation of more than one policy jacket at a time for a single file (a.k.a. Simultaneous Policy)
  - When only one policy is to be issued on a single file, the checkbox should be left unchecked as defaulted on the **Generate Policy Jacket** screen (Figure 13)
    - If another policy needs to be added to the file at a later date it can be done at any time
  - When more than one policy needs to be issued on a single file, click **Issue Simultaneous Policy** checkbox so it is checked and 2 Policy Jacket sections for Residential property type or 3 Policy Jacket sections for Non-Residential property type will automatically default on the **Generate Policy Jacket** screen (Figure 14)
    - Issue up to 5 jackets on a Residential file and up to 8 on a Non-Residential file as needed by clicking the **Add Policy Jacket** button

Figure 13 – Generate Policy Jacket Screen - Single Policy Jacket Creation

The screenshot shows the 'Generate Policy Jacket' screen with the following sections and highlighted elements:

- Agency Details:** Test agent 2 (11636.01.01.31.TX / Portland, OR) [Red arrow points to the dropdown arrow]
- File Number:** TestAgent2TX4
- Property Type:** Residential [Red arrow points to the dropdown arrow]
- Issue Simultaneous Policy:** ☐ [Red arrow points to the checkbox]
- Property Information:** [Red arrow points to the section header]
  - Address 1: 111 Test Avenue
  - Address 2: Suite 150
  - Zip: 77042
  - City: Houston
  - State: TX
  - County: Harris
- Policy Jacket:** [Red arrow points to the section header]
  - Jacket Type:** T-2R (2014) Short Form Residential Loan Policy [Red arrow points to the dropdown arrow]
  - Liability Amount:** \$ 150,000.00
  - Policy Date:** 02/14/2017
  - Policy Time:** 08:00 pm
  - Policy Premium:** \$ 250.00
  - Loan Number:** 111111
  - Mortgage Date:** 02/14/2017
  - Mortgage Amount:** \$ 150,000.00
  - Insured Name:** Wells Fargo Bank, N.A.
  - Insured Clause:** its successors and/or assigns
  - Borrower Name(s):** Mr and Mrs Borrower
  - Statistical Code:** 3000 - Single Issue
  - Addendum:** ☒ [Red box highlights this and the 'Remove Arbitration Section' checkbox]
  - Remove Arbitration Section:** ☐
  - Endorsements:** 2 [Red box highlights this and the list of endorsements: 0140-T-33, 0141-T-33]
- Delivery Options:** [Red arrow points to the section header]
  - Include My Email Address:** ☐
  - Email Jacket to:** [Red box highlights the input field]
  - Fax Jacket to:** [Red box highlights the input field]
- Buttons:** [Red boxes highlight the 'Generate Jacket' and 'Cancel' buttons at the bottom]

Figure 14 – Generate Policy Jacket Screen - Simultaneous Policy Jacket Creation

The screenshot displays the 'Generate Policy Jacket' interface. At the top, the 'Agency Details' section shows 'Test agent 2 (11636.01.01.31.TX / Portland, OR)' with a dropdown arrow. Below this, the 'File Number' is 'TestAgent2TX7' and 'Property Type' is 'Residential'. A checkbox 'Issue Simultaneous Policy' is checked. A red arrow points to this checkbox.

The 'Property Information' section is expanded, showing 'Address 1: 123 Test Avenue', 'Address 2: Suite 350', 'Zip: 77042', 'City: Houston', 'State: TX', and 'County: Harris'. A red arrow points to the 'Property Information' header.

The first 'Policy Jacket' entry is highlighted with a red box. It includes checkboxes for 'Include Loan Policy' (unchecked) and 'SIMO Rate Applied' (unchecked). The 'Jacket Type' is 'T-1 (2014) Owner's Policy of Title Insurance', 'Liability Amount' is '\$ 150,000.00', 'Policy Date' is '03/29/2017', 'Policy Time' is '08:00 am', 'Policy Premium' is '\$ 150.00', 'Insured Name' is 'Mr and Mrs Borrower', and 'Statistical Code' is '1200 - Simultaneous With Mtp'. A red arrow points to the 'SIMO Rate Applied' checkbox. Below this, the 'Endorsements' section shows '0100-T-3, 0400-T-3'.

The second 'Policy Jacket' entry is also highlighted with a red box. It includes checkboxes for 'Include Owner's Policy' (unchecked) and 'SIMO Rate Applied' (checked). The 'Jacket Type' is 'T-2 (2014) Loan Policy of Title Insurance', 'Liability Amount' is '\$ 250,000.00', 'Policy Date' is '03/29/2017', 'Policy Time' is '08:00 am', 'Policy Premium' is '\$ 250.00', 'Loan Number' is '111111', 'Mortgage Date' is '03/29/2017', 'Mortgage Amount' is '\$ 350,000.00', 'Insured Name' is 'Wells Fargo Bank, N.A.', 'Insured Clause' is 'its successors and/or assigns', and 'Statistical Code' is '3210 - Simultaneous With Otp'. A red arrow points to the 'SIMO Rate Applied' checkbox. Below this, the 'Endorsements' section shows '0140-T-33, 0211-T-3'.

At the bottom of the form, there is an 'Add Policy Jacket' button, a 'Delivery Options' section with an 'Include My Email Address' checkbox, and two buttons: 'Generate Jacket' and 'Cancel'. Red arrows point to the 'Add Policy Jacket' button, the 'Include My Email Address' checkbox, the 'Generate Jacket' button, and the 'Cancel' button.

3. Enter the Property Information, Policy Jacket information and Deliver Options (Figure 13 or Figure 14)
  - a. **Property Information Section:** Fields in bold are required
    - i. The city name will default after a valid zip code is entered when there is only one associated city name. If there is more than one associated city name to the zip code entered Please Choose... will display in the dropdown for selection (Figure 15)
      1. If the city name needed is not available in the dropdown after a valid zip code is entered, you can change the city name as needed

- Click the **Edit icon** next to the City field to remove the selected city (Figure 16) and type in the new city name (Figure 17). To return the original city value selected click the **Edit icon** again (Figure 18)
- ii. The county name will default after a valid city name is selected when there is only one associated county name. If there is more than one associated county name to the city name selected Please Choose... will display in the dropdown for selection (Figure 19)
  - 1. If the county name needed is not available in the dropdown after a valid city name is selected, you can change the county name as needed
    - Click the **Edit icon** next to the County field to remove the defaulted or selected county (Figure 18) and type in the new county name (Figure 20). To return the original county value selected click the **Edit icon** again (Figure 18)

Figure 15 – City Field Not Prepopulated Due to Zip Code Associated to Multiple Cities

Property Information

Address 1: 123 Test Avenue

Address 2: Suite 350

Zip: 77045 City: Please choose... State: TX County: Please choose...

Figure 16 – Edit Icon for City

Property Information

Address 1: 123 Test Avenue

Address 2: Suite 350

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

Figure 17 – City Field Turns to Text Box to Enter Preferred City Name

Property Information

Address 1: 123 Test Avenue

Address 2: Suite 350

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

Figure 18 – Edit Icon for City and County Clicked to Populate Original City or County Name

Property Information

Address 1: 111 Test Avenue

Address 2: Suite 150

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

Figure 19 – County Field Not Prepopulated Due to Zip Code/City Associated to Multiple Counties

Property Information


Address 1: 123 Test Avenue

Address 2: Suite 350

Zip: 77025 City: Houston State: TX County: Please choose...

Figure 20 – County Field Turns to Text Box to Enter Preferred County Name

The screenshot shows a 'Property Information' form with the following fields: Address 1 (123 Test Avenue), Address 2 (Suite 350), Zip (77005), City (Houston), State (TX), and County (Test County). The County field is highlighted with a red box and a red arrow pointing to it.

- 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
- **Include Owner's Policy or Include Loan Policy checkboxes:** If the Issue Simultaneous Policy checkbox was checked, 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 (Figure 14)
    - Issue up to 2 Owner Policy jackets and 3 Loan Policy jackets on a Residential file or issue up to 3 Owner Policy jackets and 5 Loan Policy jackets on a Non-Residential file as needed. At any time the limit is exceeded for the type of policy (Owner, Loan) and property type (Residential, Non-Residential) a notification message will display, follow the instructions provided
- The screenshot shows a 'Message' dialog box with the following text: 'Jacket generation for the Jacket Type selected has reached its maximum allowable limit: Owner(3), Maximum: 2, Total: 3. Please review the open policies on the file and void any that are not needed. Please contact Agency support at (877) 840-0841 or AgencySupport@wfgnationaltitle.com if assistance is needed.' An 'OK' button is highlighted with a red box.
- Click **OK button** to close the message and return to the **Generate Policy Jacket** screen
- **SIMO Rate Applied:** If the Issue Simultaneous Policy checkbox was checked select this checkbox to indicate the simultaneous rate being charged for the loan policy. If a loan policy jacket is selected this checkbox will default to checked, if an owner policy will default to unchecked. \*There is no current validation on this field so you may disregard this step (Figure 14)
  - **Clear icon** : This icon is enabled when the jacket type is selected, click **Clear icon** to reset the entire Policy Jacket section for which it was clicked only (Figure 13 or Figure 14) and a confirmation message will display
- The screenshot shows a 'Confirmation' dialog box with the question: 'Are you sure you want to clear all data in this Policy Jacket section?'. There are 'Yes' and 'No' buttons at the bottom, with the 'Yes' button highlighted by a red box.
- Click **Yes button** to close the message to reset/clear the entire policy jacket section
  - Click **No button** to close the message and the policy jacket section will not be reset/cleared
- **Liability Amount:** The liability amount entered will be verified against the single risk limitation for a transaction as set forth in your Agency Agreement and if the amount is greater than or equal to that single risk limitation amount, a notification message indicating an over the limit (OTL) request is necessary to proceed with generating the policy jacket will display after clicking the Generate Jacket button. **[Refer to Subsection 1.012 in Section 5]**



i. **Addendum button:** Only available on Short Form Loan jacket types

1. After **Addendum button** is selected do the following:

- a. Type and format, as necessary, the language to be printed on the Addendum for the policy jacket
- o Click **Cancel button** to close the Addendum window and any data entered will not be saved
- o Click **Done button** when finished typing the addendum language to return to the **Generate Policy Jacket** screen
  - The check mark on the Addendum button indicates something was typed in the Addendum window (Figure 13)

ii. **Endorsements button:**


1. Select endorsements as needed for the jacket type

- a. Selection of endorsements is especially important for the Short Form Loan policy jackets since they can be visible on the pdf file
- b. All endorsements selected will display on the Policy Remittance report for the policy jacket(s) generated

2. After **Endorsements button** is selected do the following:

- a. Select needed endorsements by clicking in the checkbox next to the endorsement code
  - i. If there is a default charge amount for the endorsement it will be populated in the box next to the endorsement selected. You can edit the amount in the text box as necessary
    1. Click **Calculate button** to total all selected endorsement charges
- b. Click **Cancel button** to close the Endorsements screen and any data entered will not be saved
- c. Click **Done button** when all endorsements are selected to return to the **Generate Policy Jacket** screen
  - i. The count on the Endorsements button indicates the number of endorsements selected (Figure 13 or Figure 14)

- ii. The box next to the Endorsements button shows what endorsements were selected and may be included on a short form loan policy and/or included on the remittance report as indicated above (Figure 13 or Figure 14)

- c. **Delivery Options Section:** Entering email(s) or fax number(s) for distribution of the policy jacket is optional
  - o Click **Include My Email Address** checkbox to default your primary email address in the Email Letter To field (Figure 13 or Figure 14)
  - o When email and/or fax is entered, an email with pdf attachment of the policy jacket and/or fax with a copy of the policy jacket will automatically be sent to the recipient(s) upon successful generation of the policy jacket document
  - o An email and/or fax can be sent at a later time after the policy jacket has been successfully generated **[Refer to Subsection 1.021 in Section 7]**
4. Click **Cancel button** at any time to close the **Generate Policy Jacket** screen and any data entered will not be saved
5. Click **Generate Jacket button** to process the policy jacket pdf file(s) and save the entered data (Figure 13 or Figure 14)
  - a. If there are any errors a validation flag will display next to or below the errored field(s) that briefly describe the error; all errors must be fixed to continue
 
  - b. If the liability amount entered exceeds the Single Risk Limitation for a transaction as set forth in your Agency Agreement a notification message will display indicating an Over the Limit (OTL) authorization request must be obtained to complete the generation of the policy jacket document. **[Refer to Subsection 1.012 in Section 5]**
    - o An automatic email notification will be sent to the assigned Agency Representative and WFG Underwriting staff notifying them that an over the limit policy jacket was submitted on the file
  - c. If there are no errors a generation message is displayed, click **OK button**

## Single Policy Jacket

**Message**

Thank you for generating an eJacket. The PDF will be processed and available shortly.

The policy number is 3167048-02794141. 📄

**OK**

## Simultaneous Policy Jacket

**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**

6. While the policy jacket is processing, you will be navigated to the **WFG File Services** screen, **Jackets** tab

- The policy jacket(s) generated being generated will display on the **Jackets** tab on the lower portion of the screen and can be reviewed by clicking the View action *[Refer to Subsection 1.020 in Section 7]*
- If the file record did not previously exist it will automatically be established on the top portion of the screen using the information provided in the policy jacket, including the Agency selected, file status, file number, property type and property address
- If the file record did previously exist the policy jacket will be added to it as a new service and any modifications to the property information will automatically be updated
- When the policy jacket(s) are successfully generated the Actions [Void All, Edit, Send, View, Void] will be enabled
- The policy number(s) are available for remittance when the Policy Status is Assigned
- The policy number(s) are not available for remittance when the Policy Status is An Error occurred *[Refer to Subsection 1.011 in Section 4]*

**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: TestAgent2TX24 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**

	Jacket Type	Policy Status	Policy Number	Policy Date	Actions
+	T-1 (2014) Owner's Policy of Title Insurance	Assigned	103-A66-02794142 📄	02/14/2017	<a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">View</a>   <a href="#">Void</a>
+	T-2R (2014) Short Form Residential Loan Policy	Assigned	3167048-02794141 📄	02/14/2017	<a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">View</a>   <a href="#">Void</a>
+	T-2 (2014) Loan Policy of Title Insurance	Pending OTL Review	3166548-02794143 📄	02/14/2017	<a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">View</a>   <a href="#">Void</a>

[Void All](#)

**Generate New Jacket**

7. If an additional policy jacket is needed on the current file whether simultaneous or not, click the **Generate New Jacket** button on the lower portion of the **Jackets** tab to display the **Generate Policy Jacket** screen once again. Note if only changes need to be made to the existing policy jacket select the Edit action rather than create a new one *[Refer to Subsection 1.019 in Section 7]*

- a. On the **Generate Policy Jacket** screen notice the Agency Details, File Number, Property Type and Property Information entered previously and saved to the file record will prepopulate

Generate Policy Jacket

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

**File Number:** TestAgent2TX34 **Property Type:** Residential ▼ ☐ Issue Simultaneous Policy

**Property Information**

Address 1: 111 Test Avenue

Address 2: Suite 150

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

**Policy Jacket**

Jacket Type: Please choose... ▼

**Delivery Options**

Generate Jacket Cancel

- i. **Property Type:** Verify the Property Type is correct for this file
1. **Correct:** Skip to step 7a ii below
  2. **Not Correct:** Click **Cancel button** to return to the **WFG File Services** screen to update the incorrect property type on the file record. *[Refer to Section 11]* Once the property type is correct repeat the steps described in this item number (7)
- ii. **Issue Simultaneous Policy checkbox:** Checkbox is enabled if there is not simultaneous policy jackets existing on the file. Checkbox is disabled if there is simultaneous policy jackets existing on the file
1. **Add policy jacket(s) to file - Non-Existing simultaneous group:** Click checkbox so it is checked and 2 Policy Jacket sections for Residential property type or 3 Policy Jacket sections for Non-Residential property type will automatically default on the **Generate Policy Jacket screen** (Figure 21) to add multiple additional policy jackets to the file in addition to any policy jackets already existing on the file
  - a. Issue up to 5 jackets on a Residential file and up to 8 on a Non-Residential file as needed by clicking on the **Add Policy Jacket button**. At any time the limit is exceeded for the type of policy (Owner, Loan) and property type (Residential, Non-Residential) a notification message will display, follow the instructions provided

**Message**

Jacket generation for the Jacket Type selected has reached its maximum allowable limit: Owner(3), Maximum: 2, Total: 3.

Please review the open policies on the file and void any that are not needed.

Please contact Agency support at (877) 840-0841 or AgencySupport@wfgnationaltitle.com if assistance is needed.

OK

- i. Click **OK button** to return to the **Generate Policy Jacket** screen


- ii. Use the **Clear icon**  as needed in the policy jacket section(s) that exceed the limit to remove all the data then proceed with generating the policy jacket(s) that do not exceed the limit
2. **Add policy jacket to file - Existing simultaneous group:** Checkbox remains unchecked and locked, continue to selecting a Jacket Type
- b. Select a Jacket Type in the Policy Jacket section and a notification message will be displayed indicating there is an existing policy jacket (e.g. Owner, Loan, Binder) on the file (Figure 22)

Figure 21 – Generate Policy Jacket Screen - Simultaneous Policy Jacket Creation

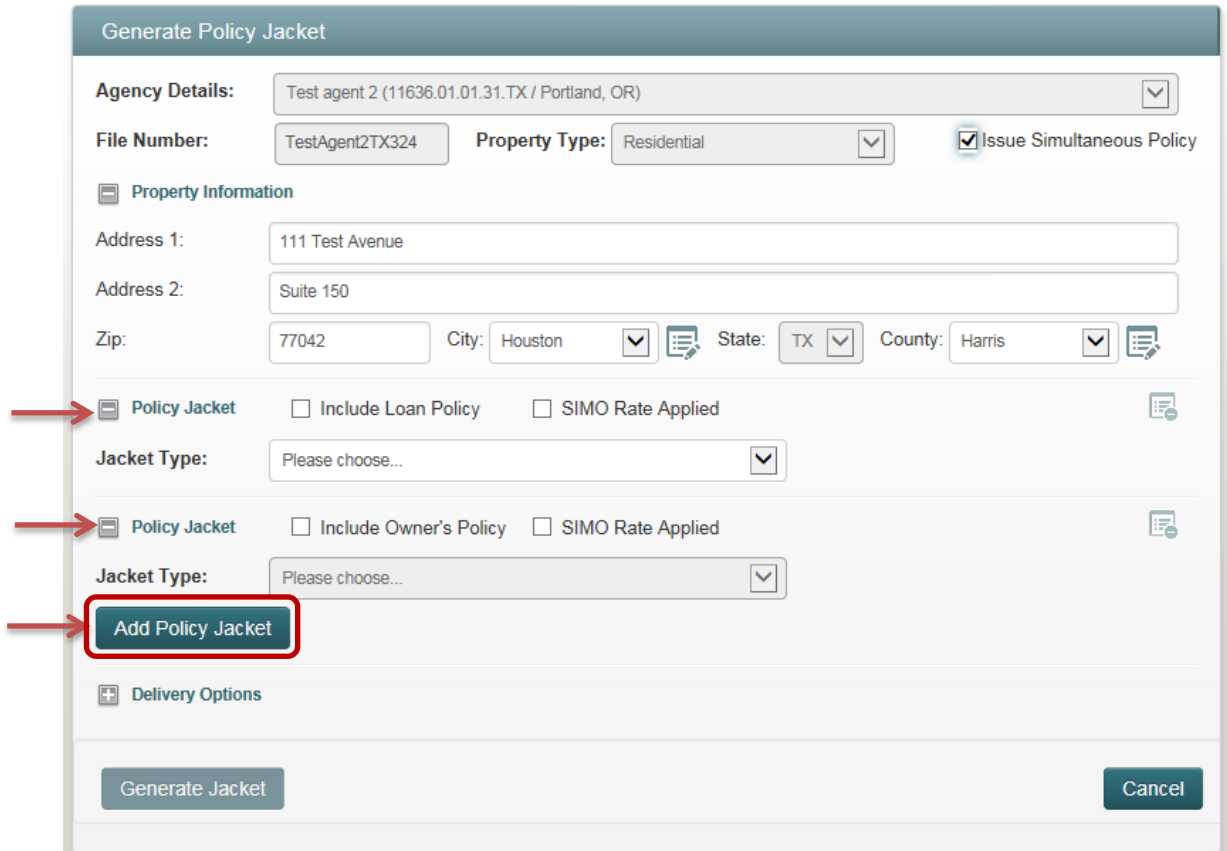
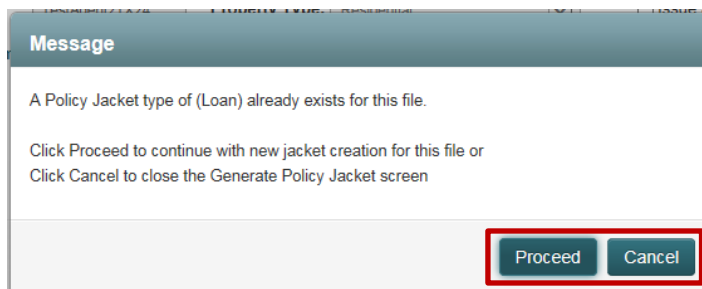


Figure 22 – Notification Message There is Policy Jacket(s) That Exist on the File



- i. **Cancel button:** Click to exit the **Generate Policy Jacket** screen and return to the **Jackets** tab on the **WFG File Services** screen
- ii. **Proceed button:** Click to continue creating new jacket(s) and a confirmation message will display asking if the new policy jacket(s) will be simultaneous with the existing loan or owner policy on the file

**Message**

Will this be a Simultaneous Issue Policy with the existing Loan Policy generated for this file?

**Yes** **No**

1. **No button:** Click to continue creating policy jacket(s). The **Generate Policy Jacket** screen will automatically refresh, the available data entry fields will be displayed for the selected Jacket Type; fields in bold are required. Enter policy jacket information
  - When **Issue Simultaneous Policy checkbox** is initially checked any policy jackets generated now will become simultaneous, but any existing policy jacket on the file will not become a part of the simultaneous group
    - Note the existing policy jacket information on the file did not prepopulate on the **Generate Policy Jacket** screen for review
    - Click **Add Policy Jacket button** as needed to add additional Policy Jacket sections to create the simultaneous group

**Generate Policy Jacket**

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

**File Number:** TestAgent2TX324 **Property Type:** Residential ▼ ☒ Issue Simultaneous Policy

**Property Information**

Address 1: 111 Test Avenue

Address 2: Suite 150

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

**Policy Jacket** ☒ Include Loan Policy ☒ SIMO Rate Applied

**Jacket Type:** T-2 (2014) Loan Policy of Title Insurance ▼ **Liability Amount:** \$

**Policy Date:** mm/dd/yyyy **Policy Time:** hh:mm AM **Policy Premium:** \$

**Loan Number:** **Mortgage Date:** mm/dd/yyyy **Mortgage Amount:** \$

**Insured Name:**

**Insured Clause:** Please choose... ▼

**Statistical Code:** Please choose... ▼

**Endorsements** 0 No endorsements selected.

**Policy Jacket** ☐ Include Owner's Policy ☐ SIMO Rate Applied

**Jacket Type:** Please choose... ▼

**Add Policy Jacket**

**Delivery Options**

**Generate Jacket** **Cancel**

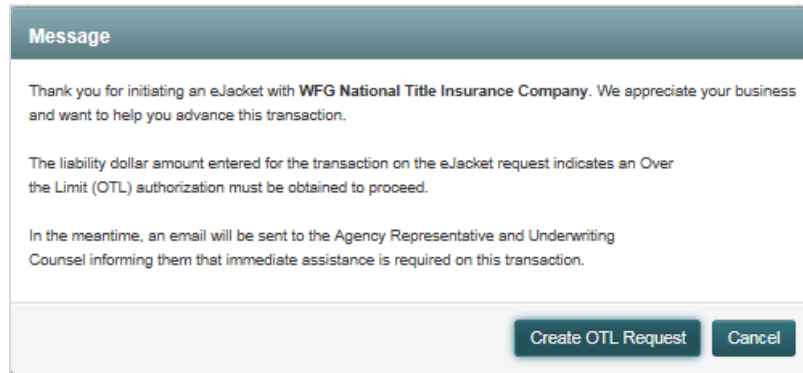
- When **Issue Simultaneous Policy checkbox** is not initially checked the policy jacket generated now will not become simultaneous with an existing policy jacket on the file
  - Each jacket will be considered single issue from a system standpoint

2. **Yes button:** Click to continue creating simultaneous policy jacket(s)
  - When **Issue Simultaneous Policy checkbox** is initially checked any policy jackets generated now will become simultaneous with the existing policy jacket on the file
    - Note the existing policy jacket information prepopulated on the **Generate Policy Jacket** screen for review. Click the plus sign to expand the Policy Jacket section for review as needed

- When **Issue Simultaneous Policy checkbox** is not initially checked the policy jacket generated now will become simultaneous with an existing policy jacket on the file due to selecting Yes on the simultaneous message
    - Note the **Issue Simultaneous Policy checkbox** will automatically become checked and locked
- c. Click **Cancel button** at any time to close the **Generate Policy Jacket** screen and any data entered will not be saved
  - d. When all information is entered click **Generate Jacket button** to process the policy jacket pdf file(s) and save the entered data
    - i. If there are any errors a validation flag will display next to or below the errored field(s) that briefly describe the error; all errors must be fixed to continue
 

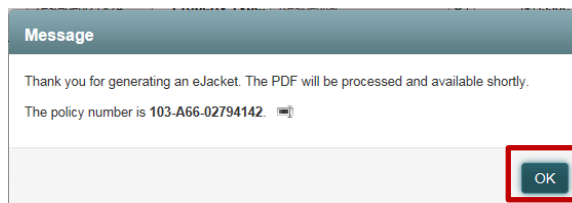
This field is required.
    - ii. If the liability amount entered exceeds the Single Risk Limitation for a transaction as set forth in your Agency Agreement a notification message will display indicating an Over the Limit (OTL) authorization request must be obtained to complete the generation of the policy jacket document. **[Refer to Subsection 1.012 in Section 5]**

1. An automatic email notification will be sent to the assigned Agency Representative and WFG Underwriting staff notifying them that an over the limit policy jacket was submitted on the file

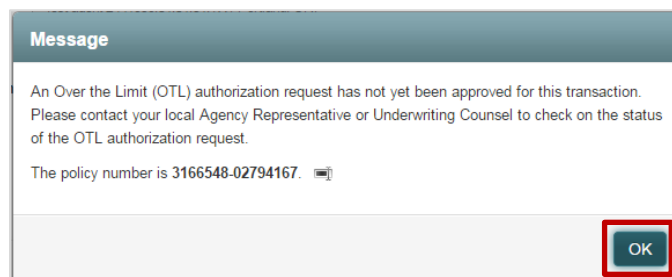


iii. If there are no errors

1. And the liability amount entered is not over the limit, a generation message is displayed, click **OK button**



2. And the liability amount entered is over the limit, an OTL Request is submitted but not yet reviewed by WFG Underwriting, a generation message is displayed, follow the instructions provided, click **OK button**



- e. While the policy jacket is processing, you will automatically be navigated to the **WFG File Services** screen, **Jackets** tab
  - The policy jacket(s) generated being generated will display on the Jackets tab on the lower portion of the screen. Click the plus sign next to any policy jacket to review the Simultaneous With information as needed
  - Since the file record did previously exist the policy jacket will be added to it as a new service and any modifications to the property information will automatically be updated
  - When the policy jacket(s) are successfully generated the Actions [Void All, Edit, Send, View, Void] will be enabled
  - The policy number(s) are available for remittance when the Policy Status is Assigned
  - The policy number(s) are not available for remittance when the Policy Status is An Error occurred  
**[Refer to Subsection 1.011 in Section 4]**



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: TestAgent2TX34 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:

File Info **Jackets** OTL

**Jackets**

Jacket Type	Policy Status	Policy Number	Policy Date	Actions
T-2 (2014) Loan Policy of Title Insurance	Assigned	3166548-02794158	02/24/2017	<a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">View</a>   <a href="#">Void</a>
Simultaneous With 103-A66-02794157		Covered Party	Date Created 02/24/2017	
T-1 (2014) Owner's Policy of Title Insurance	Assigned	103-A66-02794157	02/24/2017	<a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">View</a>   <a href="#">Void</a>

8. If an additional policy jacket is not needed on the current file, but you want to generate a policy jacket for a different file, hover over the **Create Tab**, select **Jacket** and a confirmation message is displayed asking if you want to create a new policy jacket for the current file

WFGAGENT powered by Williston Financial Group

Welcome, CplWebTest Acct

CPL

**Jacket**

OTL Request

**Confirmation**

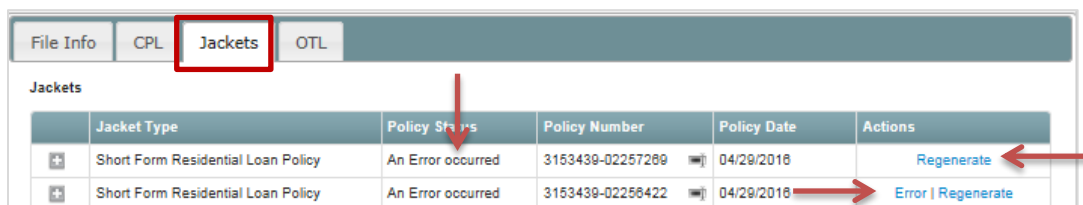
Create New Policy Jacket for Current File?

- No button:** Click to display the **Generate Policy Jacket** screen again and create a new policy jacket on a different file repeating the steps for creating a new policy jacket
- Yes button:** Click to display the **Generate Policy Jacket** screen and create a new policy jacket on the current file repeating the steps for creating a new policy jacket

## 1.011 Regenerate Policy Jacket Document in An Error Occurred Policy Status

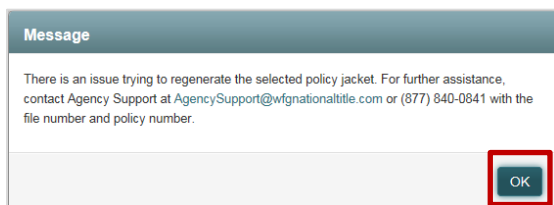
1. If there was an issue generating the policy jacket document on the file the Policy Status will display An Error occurred and a Regenerate link will display in the Actions on the lower portion of the **WFG File Services** screen, **Jackets** tab (Figure 23)
  - a. Click **Regenerate link** to reprocess the policy jacket document (Figure 23)
    - i. If the document failed to process again the Policy Status will remain An Error occurred and **Error | Regenerate link** will display in the Actions (Figure 23)
      1. Click **Error link** to display contact information for further assistance (Figure 24), click **OK button** to close the informational message and return to the **WFG File Services** screen, **Jackets** tab

Figure 23 – WFG File Services Screen – Jackets tab



	Jacket Type	Policy Status	Policy Number	Policy Date	Actions
+	Short Form Residential Loan Policy	An Error occurred	3153439-02257289	04/29/2018	Regenerate
+	Short Form Residential Loan Policy	An Error occurred	3153439-02256422	04/29/2018	Error   Regenerate

Figure 24 – Issue with Regeneration of Policy Jacket Informational Message



**Message**

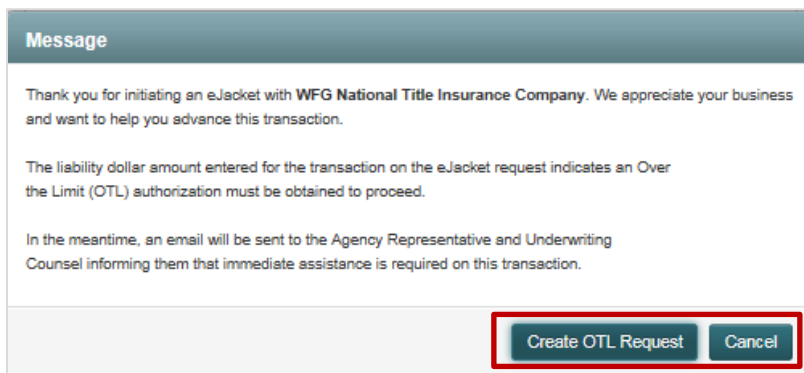
There is an issue trying to regenerate the selected policy jacket. For further assistance, contact Agency Support at AgencySupport@wfgnationaltitle.com or (877) 840-0841 with the file number and policy number.

OK

## 5 Over the Limit (OTL) Request Creation

### 1.012 Create OTL Request at Time of Jacket Creation

1. If the liability amount entered on a policy jacket being created exceeds the Single Risk Limitation for a transaction as set forth in your Agency Agreement a notification message indicating an over the limit (OTL) request is necessary to proceed will display after clicking the **Generate Jacket button** on the **Generate Policy Jacket** screen



**Message**

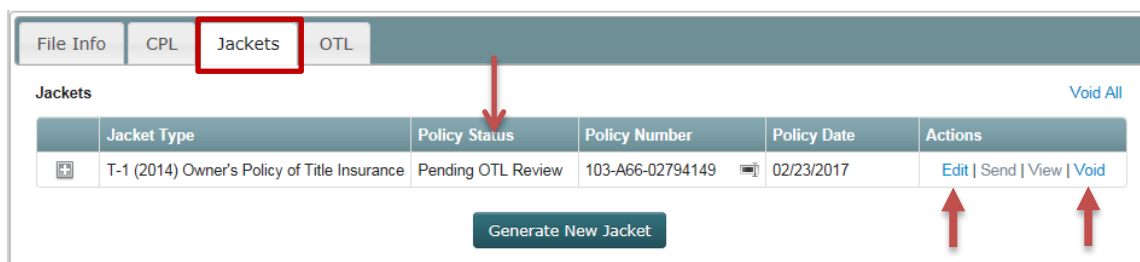
Thank you for initiating an eJacket with **WFG National Title Insurance Company**. We appreciate your business and want to help you advance this transaction.

The liability dollar amount entered for the transaction on the eJacket request indicates an Over the Limit (OTL) authorization must be obtained to proceed.

In the meantime, an email will be sent to the Agency Representative and Underwriting Counsel informing them that immediate assistance is required on this transaction.

**Create OTL Request** **Cancel**

- a. **Cancel button:** Click to close the message and return to the **WFG File Services** screen, **Jackets** tab where the policy jacket document will not be generated and the Policy Status will be Pending OTL Review until an approved OTL Request is on the file or the policy jacket is voided
  - o If the liability amount was entered incorrectly, the policy jacket can be edited to correct the liability amount by selecting the Edit action for that policy on the **Jackets** tab. **[Refer to Subsection 1.019 in Section 7]** If the revised liability amount entered is lower than the Single Risk Limitation, the policy will reprocess and generate the policy jacket document when updated
  - o If the policy jacket is no longer needed it can be voided by selecting the Void or Void All action for that policy on the **Jackets** tab. **[Refer to Subsection 1.022 in Section 7]**
  - o If the liability amount entered does not exceed the Single Risk Limitation for a transaction as set forth in your Agency Agreement or any amendments thereto, contact Agency Support to verify the amount set up on your customer account record. **[Refer to Subsection 1.06 in Section 2]**



File Info CPL **Jackets** OTL

Jackets Void All

	Jacket Type	Policy Status	Policy Number	Policy Date	Actions
+	T-1 (2014) Owner's Policy of Title Insurance	Pending OTL Review	103-A66-02794149	02/23/2017	Edit   Send   View   Void

Generate New Jacket

- b. **Create OTL Request button:** Click to display the **Create OTL Request** screen with the Agency Details, Property State, Agent File #, Property Information and Liability Amount already mapped from the policy jacket(s). Your primary email address will default in the Agent Email field for notification purposes throughout the processing of the OTL Request
2. On the **Create OTL Request** screen complete each question by entering the requested information, selecting a radio button or uploading requested documentation for Question 1, Question 14 or Upload Other Files; fields in bold are required

- **Agent Email:** Verify your defaulted email address is accurate for notifications on the OTL Request progress. You can update the email on the screen if not correct, but also notify Agency Support to update your user account for future notifications. **[Refer to Subsection 1.06 in Section 2]**
- **Property Information:** If vacant land or no property address or zip code you can enter descriptive data in the Short Legal field which will override the Address1, City and Zip from being required
- **Question 1:** If the commitment/preliminary report is not yet issued, select No and a copy of the information can be attached at a later date after the OTL Request has been submitted
- **Question 2:** The liability amount entered on the policy jacket, policy jackets if simultaneous, will default in the Lenders Amount of Policy and/or Owners Amount of Policy fields. If the amount entered is \$3,000,001.00 or greater the request will require Senior Underwriter Approval in addition to the first level Underwriter Approval

Create OTL Request

Agency Details:

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

Property State:

TEXAS

Agent File #:

TestAgent2TX25

Agent Email:

msmith@willistonfinancial.com

Agent Fax:

Insured Name:

Property Information:

Address 1:

111 Test Avenue

Address 2:

Suite 150

Zip:

77042

City:

Houston

State:

TX

Short Legal:

1

Has a Commitment/Preliminary report been issued?

☐ Yes
☐ No

Attach copy of commitment

Add files...

Delete All

File name

2

Policies to be issued:

Lenders Amount of Policy:

\$ 2,500,000.00

Owner's Amount of Policy:

\$ 0.00

3 Brief description of property (offices, single family, etc):

4 Is this transaction ☐ Purchase ☐ Refinance ☐ Other

5 Insured Interest: ☐ Fee Simple ☐ Leasehold ☐ Other

6 Does land abut an open, dedicated road? ☐ Yes ☐ No

7 Is the property to be insured subject to a potential encumbrance or loss of priority due to unfiled construction and/or mechanic's liens? ☐ Yes ☐ No

8 Is any portion of the property formerly railroad land? ☐ Yes ☐ No

9 Are there any potential Indian claim issues? ☐ Yes ☐ No

10 Are there any known creditors rights issues? ☐ Yes ☐ No

11 Is property affected by any type of water (beach, lake, wetland, marsh)? ☐ Yes ☐ No

12 Will you be giving survey coverage? ☐ Yes ☐ No

13 Will you be giving affirmative coverage or insuring any other unusual risks? ☐ Yes ☐ No

14 Endorsements Requested (attach copies if necessary):

Add files...

Delete All

File name

15 From our examination of the title and the above, it is our opinion that the Policy requested can be safely issued. ☐ Yes ☐ No

Upload Other Files

including the title search or any other supporting documents.

Add files...

Delete All

Note

Submit OTL Request

Save and Close

Clear form

Cancel

3. Click **Cancel button** at any time to close the **Create OTL Request** screen and be navigated to the **WFG File Services** screen, **OTL** tab; any data entered will not be saved
  - Click the **Create OTL Request button** as necessary to begin a new OTL Request on this file. Note the liability amount will not be mapped from the policy jacket(s) initiated and will have to be entered manually along with the remaining information

File Info | CPL | Jackets | **OTL**

Authorization Requests

OTL Status	Lender Amount	Owner Amount	Document Number	Date Created	Actions
<div style="border: 1px solid red; padding: 5px; display: inline-block;">Create OTL Request</div>					

- Click the **Jackets** tab as needed to review the policy jacket(s). The policy jacket document will not be generated and the policy status will remain in Pending OTL Review until an approved OTL Request is on the file
  - If the liability amount was entered incorrectly, the policy jacket can be edited to correct the liability amount by selecting the Edit action for that policy. *[Refer to Subsection 1.019 in Section 7]* If the revised liability amount entered is lower than the Single Risk Limitation, the policy will reprocess and generate the policy jacket document when updated.
  - If the policy jacket is no longer needed it can be voided by selecting the Void or Void All action for that policy. *[Refer to Subsection 1.022 in Section 7]*

File Info | CPL | **Jackets** | OTL

Jackets Void All

Jacket Type	Policy Status	Policy Number	Policy Date	Actions
T-1R (2014) Residential Owner's Policy	Pending OTL Review	241-A66-02794151	02/23/2017	<a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">View</a>   <a href="#">Void</a>

Generate New Jacket

4. Click **Clear Form button** to reset/clear questions 1 through 15, including the mapped liability amount(s) from the policy jacket(s) and any documents that were added
5. Click **Save and Close button** and if all required information in the top portion of the screen (above questions 1-15) is entered a confirmation message will display confirming you want to save the OTL Request and return at a later time

**Confirmation**

Save OTL request information and return at a later time?

Yes

Cancel

- a. **Cancel button:** Click to return to the **Create OTL Request** screen to continue with entering the OTL Request data
- b. **Yes button:** Click to close the **Create OTL Request** screen, save the entered data and attached documents in the Incomplete OTL Status, and be navigated to the **WFG File Services** screen, **OTL** tab
  - i. The saved data can be accessed at a later time for completion by selecting the View action for that OTL request on the file. *[Refer to Section 10 and Subsection 1.024 in Section 8]*
  - ii. The OTL Status will be Incomplete and may remain that way for 180 days or the OTL Status will be systematically updated to Void. Notify Agency Support to have the OTL Request manually voided if the transaction is not going to move forward. *[Refer to Subsection 1.06 in Section 2]*

File Info CPL Jackets **OTL**

Authorization Requests

OTL Status	Lender Amount	Owner Amount	Document Number	Date Created	Actions
Incomplete	\$ 2,500,000.00		4548	02/23/2017	<a href="#">View</a>   <a href="#">Void</a>

- iii. The policy jacket(s) for which the OTL Request is needed will remain in Pending OTL Review and the policy jacket document(s) will not be generated until an approved OTL Request is on the file
1. If the liability amount was entered incorrectly, the policy jacket can be edited to correct the liability amount by selecting the Edit action for that policy. **[Refer to Subsection 1.019 in Section 7]** If the revised liability amount entered is lower than the Single Risk Limitation, the policy will reprocess and generate the policy jacket document when updated.
  2. If the policy jacket is no longer needed it can be voided by selecting the Void action for that policy. **[Refer to Subsection 1.022 in Section 7]**

File Info CPL **Jackets** OTL

Jackets Void All

	Jacket Type	Policy Status	Policy Number	Policy Date	Actions
	T-1R (2014) Residential Owner's Policy	Pending OTL Review	241-A66-02794151	02/23/2017	<a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">View</a>   <a href="#">Void</a>

[Generate New Jacket](#)

6. Click **Submit OTL Request button** and if all required information is entered a confirmation message will display confirming you want to submit the OTL Request

Confirmation

Submit Over the Limit Request?

[Yes](#) [Cancel](#)

- a. **Yes button:** Click and a notification message indicating the over the limit request was submitted for review will display

Message

Over the Limit Request Was Submitted For Review.

[OK](#)

- i. Click **OK button** to close the **Create OTL Request** screen, save the entered data, and be navigated to the **WFG File Services** screen, **OTL** tab
1. A notification email is automatically sent to the email address provided in the OTL Request, the Agency Representative and to WFG Underwriting indicating a new OTL Request was submitted and is pending their review



2. The OTL Status will be Pending UW Review until reviewed by WFG Underwriting and the status updated to Approved, Not Approved, Additional Info Required or Pending Senior UW Review. The OTL Request can be edited at any time prior to the status being updated by clicking on the View action. *[Refer to Subsection 1.024 in Section 8]*

File Info

CPL

Jackets

OTL

Authorization Requests

OTL Status	Lender Amount	Owner Amount	Document Number	Date Created	Actions
Pending UW Review	\$ 2,500,000.00	\$ 0.00	4547	02/23/2017	<a href="#">View</a>   <a href="#">Review</a>

3. The policy jacket(s) for which the OTL Request is needed will remain in Pending OTL Review and the policy jacket document(s) will not be generated until an approved OTL Request is on the file

File Info

CPL

Jackets

OTL

Jackets

	Jacket Type	Policy Status	Policy Number	Policy Date	Actions
	T-1 (2014) Owner's Policy of Title Insurance	Pending OTL Review	103-A66-02794153	02/23/2017	<a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">View</a>   <a href="#">Void</a>

Generate New Jacket

## 1.013 Create OTL Request Before Jacket Creation

1. After you login in you will be viewing the **WFG File Management** home screen. You can select the desired agency from the dropdown at this point or on the Create OTL Request screen which appears next. Note an Agency may default for you if your user account was established with access to only a single account number
  - a. Hover over the **Create** tab, select **OTL Request** to display the **Create OTL Request** screen



2. If an agency was not selected in the previous step on the WFG File Management screen, select one in the Agency Details dropdown now on the **Create OTL Request** screen and complete each question by entering the requested information, selecting a radio button or uploading requested documentation for Question 1, Question 14 or Upload Other Files; fields in bold are required
  - **Property State:** The Property State will automatically default based upon the Agency selected
  - **Agent File #:** The file number entered will be verified against other file number records saved for the Agency selected
    - If an existing matching file number is located the property type and property information will default from the file (Note property type is not currently visible on the OTL Request)
      - File numbers will not be considered a match if there are spaces or additional characters (e.g. Test 123 is not the same file number as Test123 or Test123 is not the same as Test123a)
    - If an existing matching file number is not located the property type will default to Residential when the file record is automatically generated for this OTL Request. You will have to update the property type on the file record to Non-Residential as needed. **[Refer to Section 11]**
  - **Agent Email:** Verify your defaulted email address is accurate for notifications on the OTL Request progress. You can update the email on the screen if not correct, but also notify Agency Support to update your user account for future notifications. **[Refer to Subsection 1.06 in Section 2]**
  - **Property Information:** If vacant land or no property address or zip code you can enter descriptive data in the Short Legal field which will override the Address1, City and Zip from being required
  - **Question 1:** If the commitment/preliminary report is not yet issued, select No and a copy of the information can be attached at a later date after the OTL Request has been submitted
  - **Question 2:** The liability amount entered on the policy jacket, policy jackets if simultaneous, will default in the Lenders Amount of Policy and/or Owners Amount of Policy fields. If the amount entered is \$3,000,001.00 or greater the request will require Senior Underwriter Approval in addition to the first level Underwriter Approval

Create OTL Request

Agency Details:

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

Property State:

TEXAS

Agent File #:

TestAgent2TX31

Agent Email:

mmnth@willistonfinancial.com

Agent Fax:

Insured Name:

Property Information:

Address 1:

Address 2:

Zip:

City:

Please choose..

State:

TX

Short Legal:

1

Has a Commitment/Preliminary report been issued?

☐ Yes
☐ No

Attach copy of commitment:

Add files...

Delete All

File name

2

Policies to be issued:

Lenders Amount of Policy:

\$

Owner's Amount of Policy:

\$

3

Brief description of property (offices, single family, etc):

4

Is this transaction

☐ Purchase
☐ Refinance
☐ Other

5

Insured Interest:

☐ Fee Simple
☐ Leasehold
☐ Other

6

Does land abut an open, dedicated road?

☐ Yes
☐ No

7

Is the property to be insured subject to a potential encumbrance or loss of priority due to unfiled construction and/or mechanic's liens?

☐ Yes
☐ No

8

Is any portion of the property formerly railroad land?

☐ Yes
☐ No

9

Are there any potential Indian claim issues?

☐ Yes
☐ No

10

Are there any known creditors rights issues?

☐ Yes
☐ No

11

Is property affected by any type of water (beach, lake, wetland, marsh)?

☐ Yes
☐ No

12

Will you be giving survey coverage?

☐ Yes
☐ No

13

Will you be giving affirmative coverage or insuring any other unusual risks?

☐ Yes
☐ No

14

Endorsements Requested (attach copies if necessary):

Add files...

Delete All

File name

15

From our examination of the title and the above, it is our opinion that the Policy requested can be safely issued.

☐ Yes
☐ No

Upload Other Files

including the title search or any other supporting documents.

Add files...

Delete All

Note

Submit OTL Request

Save and Close

Clear form

Cancel

3. Click **Cancel button** at any time to close the **Create OTL Request** screen and be navigated back to the **WFG File Management** screen; any data entered will not be saved
4. Click **Clear Form button** to reset/clear questions 1 through 15, including the mapped liability amount(s) from the policy jacket(s) and any documents that were added
5. Click **Save and Close button** and if all required information in the top portion of the screen (above questions 1-15) is entered a confirmation message will display confirming you want to save the OTL Request and return at a later time

**Confirmation**

Save OTL request information and return at a later time?

Yes Cancel

- a. **Cancel button:** Click to return to the **Create OTL Request** screen to continue with entering the OTL Request data
- b. **Yes button:** Click to close the **Create OTL Request** screen, save the entered data and attached documents in the Incomplete OTL Status, and be navigated to the **WFG File Services** screen, **OTL** tab
  - i. The saved data can be accessed at a later time for completion by selecting the View action for that OTL request on the file. *[Refer to Section 10 and Subsection 1.024 in Section 8]*
  - ii. The OTL Status will be Incomplete and may remain that way for 180 days or the OTL Status will be systematically updated to Void. Notify Agency Support to have the OTL Request manually voided if the transaction is not going to move forward. *[Refer to Subsection 1.06 in Section 2]*

File Info CPL Jackets **OTL**

Authorization Requests

OTL Status	Lender Amount	Owner Amount	Document Number	Date Created	Actions
Incomplete	\$ 2,500,000.00		4548	02/23/2017	<a href="#">View</a>   <a href="#">Void</a>

6. Click **Submit OTL Request button** and if all required information is entered a confirmation message will display confirming you want to submit the OTL Request

**Confirmation**

Submit Over the Limit Request?

Yes Cancel

- a. **Yes button:** Click and a notification message indicating the over the limit request was submitted for review will display

**Message**

Over the Limit Request Was Submitted For Review.

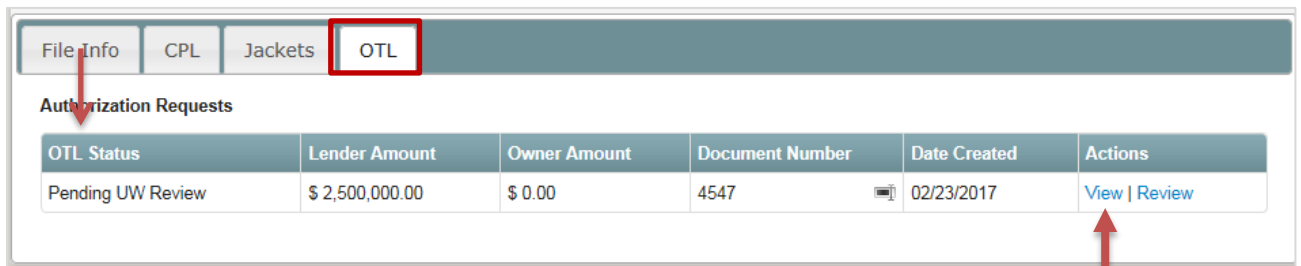
OK

- i. Click **OK button** to close the **Create OTL Request** screen, save the entered data, and be navigated to the **WFG File Services** screen, **OTL** tab

1. A notification email is automatically sent to the email address provided in the OTL Request, the Agency Representative and to WFG Underwriting indicating a new OTL Request was submitted and is pending their review



2. The OTL Status will be Pending UW Review until reviewed by WFG Underwriting and the status updated to Approved, Not Approved, Additional Info Required or Pending Senior UW Review. The OTL Request can be edited at any time prior to the status being updated by clicking on the View action. **[Refer to Section 10 and Subsection 1.024 in Section 8]**



## 6 Closing Protection Letter Actions (Cancel, Edit, Send, View, Cancel All)

1. After creating a closing protection letter you are automatically navigated to the **WFG File Services** screen, **CPL** tab where various Actions will be enabled for a closing protection letter based upon the Letter Status
  - a. To locate a file record when not already on the **WFG File Services** screen navigate to the **WFG File Management** home screen *[Refer to Subsection 1.05 in Section 2]* and search for the file record to navigate to the CPL tab. *[Refer to Section 10]*

Figure 25 – WFG File Services Screen – CPL tab

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: TestAgent2TX39 Property State: TEXAS

**Property Information**

Property Type: Residential ▼

Address 1: 4444 test

Address 2:

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

Short Legal:

[Edit](#) [Save](#) [Cancel](#)

[File Info](#) **CPL** [Jackets](#) [OTL](#)

**Letters**

	Letter Type	Letter Status	Lender Name	Letter Number	Actions
+	Lender	Assigned	Acopia, LLC.	E3B5AF65	<a href="#">Cancel</a>   <a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">View</a>
+	Buyer	Assigned	Loans Unlimited	C67B0E97	<a href="#">Cancel</a>   <a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">View</a>
+	Lender	Cancelled	Acopia, LLC.	72833291	<a href="#">Cancel</a>   <a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">View</a>

[Generate New Letter](#)

[Cancel All](#)

### 1.014 Cancel Closing Protection Letter

1. Click **Cancel hyperlink** (Figure 25) to update the selected closing protection letter Letter Status to Cancelled when the closing protection letter is not needed and a confirmation message will display confirming you want to cancel the selected closing protection letter
  - Hyperlink is only available on closing protection letters in the Assigned Letter Status

**Confirmation**

Are you sure you want to cancel the selected letter associated with this file?

Yes No

- a. **No button:** Click to close the notification message and return to the **CPL** tab on the file
- b. **Yes button:** Click to proceed to the **CPL Maintenance** screen to select a general cancel reason

2. On the **CPL Maintenance** screen select a general cancel reason in the Cancel Reason dropdown

**CPL Maintenance**

File Number: TestAgent2TX39

Letter Type: Lender

Letter Number: 72833291

Cancel Reason: Please choose...

Save Next Cancel

- a. **Cancel button:** Click to close the **CPL Maintenance** screen and return to the **CPL** tab on the file. The selected cancel reason will not be saved and status of the closing protection letter will not be updated
- b. **Save button:** Click to update the Letter Status of the closing protection letter. **CPL Maintenance** screen will automatically close and return to the **CPL** tab on the file
  - o The Letter Status on the selected closing protection letter will be updated to Cancelled and all Actions are disabled
  - o A closing protection letter cannot be reinstated once cancelled, a new closing protection letter must be created. *[Refer to Subsection 1.08 in Section 3]*

File Info

CPL

Jackets

OTL

Letters

Cancel All

	Letter Type	Letter Status	Lender Name	Letter Number	Actions
	Lender	Assigned	Acopia, LLC.	E3B5AF65	<div>Cancel   Edit   Send   View</div>
	Buyer	Assigned	Loans Unlimited	C67B0E97	<div>Cancel   Edit   Send   View</div>
	Lender	Cancelled	Acopia, LLC.	72833291	<div>Cancel   Edit   Send   View</div>

## 1.015 Edit Closing Protection Letter

1. Click **Edit hyperlink** (Figure 25) for the closing protection letter to review or edit the current closing protection letter information saved and the **Edit Closing Protection Letter** screen will display
  - Hyperlink is only available on closing protection letters in the Assigned Letter Status
2. On the **Edit Closing Protection Letter** screen you may get a confirmation message notifying you that the property information on the file for which the closing protection letter was created has changed

**Confirmation**

The property information for the file on which this Closing Protection Letter is based has changed since this Closing Protection Letter was created. If you continue, you will use the newest property information in the file.

Do you wish to continue?

Yes No Cancel

- a. **Cancel button:** Click to close the confirmation message, close out of Edit mode on the closing protection letter and return to the **WFG File Services** screen, **CPL** tab
  - b. **No button:** Click to close the confirmation message and continue editing the closing protection letter without the new property information (address) updates
  - c. **Yes button:** Click to close the confirmation message, update the property information (address); continue editing the closing protection letter information as needed
3. On the **Edit Closing Protection Letter** screen update Letter Type, Liability Amount, Property Information, Additional Letter Information, Lender, Approved Attorney (if displayed), Covered Parties (if displayed) and/or Delivery Options; fields in bold are required

**Edit Closing Protection Letter**

☐ Hide Agency Info on Letter?

**Agency Details:** Test agent 2 (11636.01.01.31.TX / Portland, OR) [View](#)

**Letter Type:** Buyer **File Number:** TestAgent2TX39

**Property Type:** Residential **Liability Amount:** \$ 200,000.00

**Property Information:**

**Address 1:** 4444 Test Avenue

**Address 2:** Suite 150

**Zip:** 77042 **City:** Houston **State:** TX

**Additional Letter Information:**

**Loan Number:** 12345466

**Borrower/Buyer Name(s):** Test Borrower

**Seller Name(s):** Test Seller

**DBA or Care of:**

**Transaction Limit:** \$ 0.00

☒ View Frequently Used Lenders Only

**Lender:** Loans Unlimited - 5431 N. Waypoint Drive, Oviedo, FL 32765 --

**Company Name:** Loans Unlimited

**Attention:**

**Mortgagee Clause:** Please choose...

**Address 1:** 5431 N. Waypoint Drive

**Address 2:**

**State:** FLORIDA **Zip:** 32765

**City:** Oviedo

**Phone:** **Fax:**

**Email:**

☐ Include in Delivery Options ☐ Email ☐ Fax

☒ Add Lender to Frequently Used List

**Delivery Options:** ☐ Include My Email Address

**Email Letter To:**

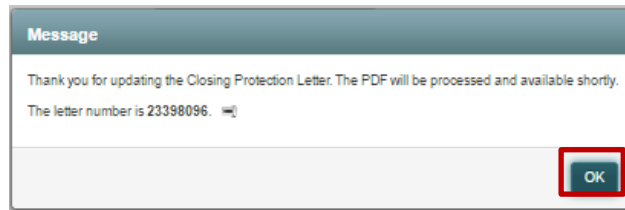
Please use commas or semicolons to separate multiple email addresses.

**Fax Letter To:**

Please use commas or semicolons to separate multiple fax numbers.

**Update Letter** **Cancel**

- a. **Cancel button:** Click to close the **Edit Closing Protection Letter** screen and return to the **CPL** tab on the file; any data entered will not be saved
- b. **Update Letter button:** Click to generate a new closing protection letter pdf file with a new Letter Number and save the updated data, a generation message is displayed



- i. Click **OK button** to close the generation message

4. While the closing protection letter is processing, you will automatically be navigated back to the **WFG File Services** screen, **CPL** tab (Figure 25)
  - The closing protection letter generated will display on the CPL tab on the lower portion of the screen in the Assigned Letter Status and the original closing protection letter edited will automatically be updated to the Cancelled Letter Status
  - When the closing protection letter is successfully generated the Actions [Cancel All, Cancel, Edit, Send, View] are enabled
  - The closing protection letter is available for validation and/or remittance when the Letter Status is Assigned
  - The closing protection letter is not available for validation and/or remittance when the Letter Status is An Error occurred **[Refer to Subsection 1.09 in Section 3]**

## 1.016 Send Closing Protection Letter


1. Click **Send hyperlink** (Figure 25) to forward a pdf copy of the closing protection letter via Fax and/or Email and the **Send Document** screen will be displayed
  - Hyperlink is only available on closing protection letters in the Assigned Letter Status
2. On the **Send Document** screen enter fax and/or Email information to enable Send button
  - a. Select the **Include My Email Address checkbox** to automatically populate the your primary Email address in the Email field
    - Verify your defaulted email address is accurate. You can update the email on the screen if not correct, but also notify Agency Support to update your user account for future notifications. **[Refer to Subsection 1.06 in Section 2]**



- i. **Cancel button:** Click to close the Send Document screen and return to the **CPL** tab on the file
- ii. **Send button:** Click to send the closing protection letter pdf copy to the recipients. Send **Document** screen will automatically close and return to the **CPL** tab on the file

## 1.017 View Closing Protection Letter

1. Click **View hyperlink** (Figure 25) to review or print a copy of the closing protection generated
  - Hyperlink is only available on closing protection letters in the Assigned Letter Status indicating that the closing protection letter document was generated and is valid
  - Depending on the browser used a new tab will open with the pdf document. When that tab is closed you will return to the original browser tab to the same file record, **CPL** tab



**WFG National Title Insurance Company**  
a Williston Financial Group company

LENDER INSURED CLOSING SERVICE LETTER

February 25, 2017

Acopia, LLC.  
Michelle Smith  
306 Northcreek Blvd.  
  
Goodlettsville, TN, 37072

**ISSUING AGENT:**  
  
Test agent 2  
1234 South West 68th Avenue  
Portland, OR 97232  
123-456-7890

**Re:** Borrowers: Test Borrower  
Property Address: 4444 Test Avenue, Suite 150, Houston, TX 77042  
Agent No.: 11636.01.01.31.TX  
Loan Reference Number: 1234566  
Agent File Number: TestAgent2TX39

Dear Sir or Madam:

WFG National Title Insurance Company (the "Company") agrees, subject to the Conditions and Exclusions set forth below, to reimburse you for actual loss incurred by you in connection with closings of real estate transactions conducted by the Issuing Agent, provided:

- (A) title insurance of the Company is specified for your protection in connection with the closing;
- (B) you are to be the lender secured by a mortgage (including any other security instrument) of an interest in land, its assignee or a warehouse lender; and
- (C) the loss arises out of:
  1. Failure of the Issuing Agent to comply with your written closing instructions to the extent that they relate to (a) the status of the title to that interest in land or the validity, enforceability and priority of the lien of the mortgage on that interest in land, including the obtaining of documents and the disbursement of funds necessary to establish the status of title or lien, or (b) the obtaining of any other document, specifically required by you, but only to the extent the failure to obtain the other document affects the status of the title to that interest in land or the validity, enforceability and priority of the lien of the mortgage on that interest in land, and not to the extent that your instructions require a determination of the validity, enforceability or effectiveness of the other document; or
  2. Fraud or dishonesty of the Issuing Agent in handling your funds or documents in connection with the closings to the extent that fraud or dishonesty relates to the status of the title to that interest in land or to the validity, enforceability and priority of the lien of the mortgage on that interest in land.
  3. If you are a lender protected under the foregoing paragraph, your assignee or your warehouse lender in connection with a loan secured by a mortgage shall be protected as if this letter were addressed to them.

**Conditions and Exclusions**

1. The Company will not be liable to you for loss arising out of:
  - A. Failure of the Issuing Agent to comply with your closing instructions to the extent that they require title insurance protection inconsistent with that set forth in the title insurance binder or commitment issued by the Company. Instructions which require the denial of specific exceptions to title or compliance with the requirements contained in the binder or commitment shall not be deemed inconsistent with the requirements of the Company.
  - B. Loss or impairment of your funds in the course of collection or while on deposit with a bank, credit union, bank failure, insolvency or suspension, except as shall result from failure of the Issuing Agent to comply with your written closing instructions to deposit the funds in a bank which you designated by name.
  - C. Defects, liens, encumbrances or other matters in connection with your loan transactions except to the extent that protection against those defects, liens, encumbrances or other matters is afforded by a policy of title insurance not inconsistent with your closing instructions.
  - D. Fraud, dishonesty or negligence of your employee, agent, attorney or broker.
  - E. Your settlement or release of a claim without the written consent of the Company.
  - F. Any matters created, suffered, incurred or agreed to by you or known to you.
2. When the Company shall have reimbursed you pursuant to this letter, it shall be subrogated to all rights and remedies which you would have had against any person or property had you not been so reimbursed. Liability of the Company for reimbursement shall be reduced to the extent that you have knowingly and voluntarily impaired the value of this right of subrogation.
3. The Issuing Agent is the Company's agent for the limited purpose of issuing title insurance policies. The Issuing Agent is not the Company's agent for the purpose of providing other closing or settlement services. The Company's liability for your losses arising from those other closing or settlement services is strictly limited to the protection expressly provided in this letter. Any liability of the Company for loss does not include liability for loss resulting from the negligence, fraud or bad faith of a lender in a real estate transaction other than an Issuing Agent, the lack of creditworthiness of any borrower connected with a real estate transaction, or the failure of collateral to adequately secure a loan connected with a real estate transaction. However, this letter does not affect the Company's liability with respect to its title insurance binders, commitments or policies.
4. Either the Company or you may elect that any claim arising under this letter be submitted to arbitration pursuant to the Title Insurance Arbitration Rules of the American Land Title Association, unless you have a policy of title insurance for the applicable transaction with an Amount of Insurance greater than \$2,000,000. If you have a policy of title insurance for the applicable transaction with an Amount of Insurance greater than \$2,000,000, a claim arising under this letter may be submitted to arbitration only when agreed to by both the Company and you.
5. You must promptly send written notice of a claim under this letter to the Company at its principal office at P. O. Box 8627, Columbia, SC 29202-8627. The Company is not liable for a loss if the written notice is not received within two years from the date of the closing.
6. The protection herein offered extends only to real property transactions in Texas.

Any previous closing protection letter or similar agreement is hereby cancelled, except for closings of your real estate transactions for which you have previously sent (or within 30 days hereafter send) written closing instructions to the Issuing Agent.

WFG NATIONAL TITLE INSURANCE COMPANY

## 1.018 Cancel All Closing Protection Letters

1. Click **Cancel All** hyperlink (Figure 25) to update all closing protection letters Letter Status to Cancelled when the closing protection letters are not needed and a confirmation message will display confirming you want to cancel all closing protection letters

- Hyperlink is only available on closing protection letters in the Assigned Letter Status

**Confirmation**

Are you sure you want to cancel all letters associated with this file?

- a. **No button:** Click to close the notification message and return to the **CPL** tab on the file
- b. **Yes button:** Click to proceed to the **CPL Maintenance** screen to select a general cancel reason for each closing protection letter

2. On the **CPL Maintenance** screen select a general cancel reason in the Cancel Reason dropdown

**CPL Maintenance**

File Number: TestAgent2TX39

Letter Type: Lender

Letter Number: 23398096

Cancel Reason:

- a. **Cancel button:** Click to close the **CPL Maintenance** screen and return to the **CPL** tab on the file. The selected cancel reason(s) will not be saved and status of the closing protection letters will not be updated
- b. **Next button:** Click after a cancel reason is selected and until the Save button is enabled on the last closing protection letter
- c. **Save button:** Click to update the letter status of the closing protection letters. **CPL Maintenance** screen will automatically close and return to the **CPL** tab on the file
  - The Letter Status on all closing protection letters will be updated to Cancelled and all Actions are disabled
  - A closing protection letter cannot be reinstated once cancelled, a new closing protection letter must be created. **[Refer to Subsection 1.08 in Section 3]**

File Info

CPL

Jackets

OTL

Letters

	Letter Type	Letter Status	Lender Name	Letter Number	Actions
	Lender	Cancelled	Acopia, LLC.	23398096	Cancel   Edit   Send   View
	Lender	Cancelled	Acopia, LLC.	E3B5AF65	Cancel   Edit   Send   View
	Buyer	Cancelled	Loans Unlimited	C67B0E97	Cancel   Edit   Send   View
	Lender	Cancelled	Acopia, LLC.	72833291	Cancel   Edit   Send   View

## 7 Policy Jacket Actions (Edit, View, Send, Void, Void All)

1. After creating a policy jacket you are automatically navigated to the **WFG File Services** screen, **Jackets** tab where various Actions will be enabled for a policy jacket based upon the Policy Status
  - a. To locate a file record when not already on the **WFG File Services** screen navigate to the **WFG File Management** home screen *[Refer to Subsection 1.05 in Section 2]* and search for the file record to navigate to the Jackets tab. *[Refer to Section 10]*

Figure 26 – WFG File Services Screen – Jackets tab

**WFG File Services** [Search Existing Files](#)

**File Information**

Agency Details: Associates Title, Inc. (10531.01.01.31.OH / Canal Winchester, OH)

File Status: Open  File Number: 1620529 Property State: OHIO

**Property Information**

Property Type: Residential

Address 1: 3823 Cass Creek Court

Address 2:

Zip: 43125 City: Groveport   State: OH  County: Franklin

Short Legal:

File Info **CPL** **Jackets** OTL

**Jackets**

	Jacket Type	Policy Status	Policy Number	Policy Date	Actions
<input type="button" value="+"/>	Expanded Coverage Residential Loan Policy (2010)	Assigned	3164800-02794164 <input type="button" value="i"/>	02/07/2017	Edit   Send   View   Void
<input type="button" value="+"/>		An Error occurred	<input type="button" value="i"/>		Error   Regenerate
<input type="button" value="+"/>	Short Form Residential Loan Policy	An Error occurred	3153439-02257269 <input type="button" value="i"/>	04/29/2016	Regenerate
<input type="button" value="+"/>	Short Form Residential Loan Policy	An Error occurred	3153439-02256416 <input type="button" value="i"/>	04/29/2016	Error   Regenerate
<input type="button" value="+"/>	Owners Policy Cover	Pending OTL Review	3155400-02794163 <input type="button" value="i"/>	02/24/2017	Edit   Send   View   Void
<input type="button" value="+"/>	Owners Policy Cover	Processed	3155400-02794162 <input type="button" value="i"/>	02/07/2017	Edit   Send   View   Void
<input type="button" value="+"/>	ALTA Homeowner's Policy	Voided	3167300-02794161 <input type="button" value="i"/>	02/21/2017	Edit   Send   View   Void

5. Click **Edit hyperlink** (Figure 26) for the policy jacket to review or edit the current policy information saved and the **Edit Policy Jacket / Edit Reason** screen will display requesting a reason for the jacket revision on the selected policy jacket
  - Hyperlink is only available on policy jackets in the Assigned or Pending OTL Review\* Policy Status
6. The **Edit Policy Jacket / Edit Reason** screen will be displayed, enter a brief edit reason for reviewing or editing the policy jacket data

- a. **Cancel button:** Click to exit the **Edit Policy Jacket / Edit Reason** screen and return to the **Jackets** tab on the file; the Edit Reason entered will not be saved
- b. **Edit Jacket button:** Click to display the **Edit Policy Jacket** screen

**\*The Edit Action for a Policy Jacket in Pending OTL Review Policy Status will only be enabled if the OTL Request was not approved**

7. On the **Edit Policy Jacket** screen you may get a confirmation message notifying you that the property information on the file for which the policy jacket was created has changed

- a. **Cancel button:** Click to close the confirmation message, close out of Edit mode on the policy jacket and return to the **WFG File Services** screen, **Jackets** tab
- b. **No button:** Click to close the confirmation message and continue editing the policy jacket without the new property information (address) updates
- c. **Yes button:** Click to close the confirmation message, update the property information (address); continue editing the policy jacket information as needed

8. On the **Edit Policy Jacket** screen you may get a confirmation message notifying you that there are endorsements selected for the policy jacket that are invalid due to a change in property type on the file record

- a. **Proceed button:** Click to proceed to the **Endorsements** screen **[Refer to Subsection 1.010 in Section 4]** where the invalid endorsements previously selected will automatically be removed. Select new endorsements that are relevant for the policy jacket and property type as needed

- b. **Show Endorsements button:** Click to proceed to the **Endorsements** screen *[Refer to Subsection 1.010 in Section 4]* where the invalid endorsements previously selected will be present and still checked. Uncheck the endorsements that are invalid or no longer relevant for the policy jacket and property type and reselect any endorsements that are relevant
9. On the **Edit Policy Jacket** screen the policy jacket section for the policy number selected for Edit will be expanded for review and any simultaneous Policy Jacket(s) generated on the file will display as read only on the screen, click the plus sign to expand the simultaneous Policy Jacket section(s) to review as needed

**Edit Policy Jacket**

**Agency Details:** Associates Title, Inc. (10531.01.01.31.OH / Canal Winchester, OH)

**File Number:** 1620529 **Property Type:** Residential ☒ Issue Simultaneous Policy

**Property Information**

**Address 1:** 3823 Cass Creek Court

**Address 2:**

**Zip:** 43125 **City:** Groveport **State:** OH **County:** Franklin

**Policy Jacket** 3155400-02794162 Owners Policy Cover (Assigned)

**Policy Jacket** 3164800-02794164 ☐ SIMO Rate Applied

**Jacket Type:** Expanded Coverage Residential Loan Policy (2010) **Liability Amount:** \$ 92,998.00

**Policy Date:** 02/07/2017 **Policy Time:** hh:mm AM **Policy Premium:** \$

**Loan Number:** **Mortgage Date:** mm/dd/yyyy **Mortgage Amount:** \$ 0.00

**Insured Name:** Jarett S. Gary and Natalie C. Gary

**Insured Clause:** Please choose...

**Endorsements** 0 No endorsements selected.

**Delivery Options**

**Update Jacket** **Cancel**

- a. Update Property Information section, Policy Jacket section and/or Delivery Options section; fields in bold are required
- Cancel button:** Click to close the **Edit Policy Jacket** screen and return to the **Jackets** tab on the file; any data entered will not be saved
  - Update Jacket button:** Click to regenerate a new policy jacket pdf file with the same policy number and save the updated data, a generation message is displayed

**Message**

Thank you for updating the eJacket. The PDF will be processed and available shortly.

The policy number is 241-A66-02340778.


**OK**

- Click **OK button** to close the generation message

10. While the policy jacket is processing, you will automatically be navigated back to the **WFG File Services** screen, **Jackets** tab (Figure 26)
- The policy jacket regenerated will display on the Jackets tab on the lower portion of the screen. Click the plus sign next to any policy jacket to review the Simultaneous With information as needed
  - When the policy jacket is successfully regenerated the Actions [Void All, Edit, Send, View, Void] will be enabled
  - The policy number is available for remittance when the Policy Status is Assigned
  - The policy number is not available for remittance when the Policy Status is An Error occurred *[Refer to Subsection 1.011 in Section 4]*

## 1.020 View Policy Jacket

1. Click **View hyperlink** (Figure 26) to review or print a copy of the policy jacket generated
  - Hyperlink is only available on policy jackets in the Assigned or Processed Policy Status indicating that the policy jacket document was generated and is valid
  - Depending on the browser used a new tab will open with the pdf document. When that tab is closed you will return to the original browser tab to the same file record, **Jackets** tab



WFG National Title Insurance Company™  
a Williston Financial Group company

**EXPANDED COVERAGE RESIDENTIAL LOAN POLICY  
FOR A ONE-TO-FOUR FAMILY RESIDENCE**  
Issued By  
**WFG NATIONAL TITLE INSURANCE COMPANY**

**POLICY NUMBER: 3164800-02794164 FILE NUMBER: 1620529**

Any notice of claim and any other notice or statement in writing required to be given to the Company under this Policy must be given to the Company at the address shown in Section 17 of the Conditions.


SUBJECT TO THE EXCLUSIONS FROM COVERAGE, THE EXCEPTIONS FROM COVERAGE CONTAINED IN SCHEDULE B, AND THE CONDITIONS, WFG NATIONAL TITLE INSURANCE COMPANY, a South Carolina corporation (the "Company") insures as of Date of Policy and, to the extent stated in Covered Risks 11, 16, 17, 18, 19, 20, 21, 22, 23, 24, 27 and 28, after Date of Policy, against loss or damage, not exceeding the Amount of Insurance, sustained or incurred by the Insured by reason of:


**COVERED RISKS**


1. Title being vested other than as stated in Schedule A.
2. Any defect in or lien or encumbrance on the Title. This Covered Risk includes, but is not limited to insurance against loss from
  - (a) A defect in the Title caused by
    - (i) forgery, fraud, undue influence, duress, incompetency, incapacity, or impersonation;
    - (ii) failure of any person or Entity to have authorized a transfer or conveyance;
    - (iii) a document affecting Title not properly created, executed, witnessed, sealed, acknowledged, notarized, or delivered;
    - (iv) failure to perform those acts necessary to create a document by electronic means authorized by law;
    - (v) a document executed under a falsified, expired, or otherwise invalid power of attorney;
    - (vi) a document not properly filed, recorded, or indexed in the Public Records including failure to perform those acts by electronic means authorized by law; or
    - (vii) a defective judicial or administrative proceeding.
  - (b) The lien of real estate taxes or assessments imposed on the Title by a governmental authority due or payable, but unpaid.
  - (c) Any encroachment, encumbrance, violation, variation, or adverse circumstance affecting the Title that would be disclosed by an accurate and complete land survey of the Land. The term "encroachment" includes encroachments of existing improvements located on the Land onto adjoining land, and encroachments onto the Land of existing improvements located on adjoining land.

In Witness Whereof, WFG NATIONAL TITLE INSURANCE COMPANY has caused this policy to be signed and sealed by its duly authorized officers as of Date of Policy shown in Schedule A.

**WFG NATIONAL TITLE INSURANCE COMPANY**

By:   
President

ATTEST:   
Secretary



ALTA Expanded Coverage Residential Loan Policy 07-28-2010  
WFG Form No 3164800

Page 1 of 10

## 1.021 Send Policy Jacket

1. Click **Send hyperlink** (Figure 26) to forward a pdf copy of the policy jacket via Fax and/or Email and the **Send Document** screen will be displayed
  - Hyperlink is only available on policy jackets in the Assigned Policy Status

2. On the **Send Document** screen enter fax and/or Email information to enable Send button
  - a. Select the **Include My Email Address checkbox** to automatically populate the your primary Email address in the Email field
    - Verify your defaulted email address is accurate. You can update the email on the screen if not correct, but also notify Agency Support to update your user account for future notifications. **[Refer to Subsection 1.06 in Section 2]**

- i. **Cancel button:** Click to close the Send Document screen and return to the **Jackets** tab on the file
- ii. **Send button:** Click to send the policy jacket pdf copy to the recipients. Send **Document** screen will automatically close and return to the **Jackets** tab on the file

## 1.022 Void Policy Jacket

1. Click **Void hyperlink** (Figure 26) to update the selected policy numbers Policy Status to Voided when the policy jacket is not needed and a confirmation message will display confirming you want to void the selected policy jacket
  - Hyperlink is only available on policy jackets in the Assigned or Pending OTL Review\* Policy Status

- a. **No button:** Click to close the notification message and return to the **Jackets** tab on the file
- b. **Yes button:** Click to proceed to the **Policy Jacket Maintenance** screen to select a general void reason

***\*The Void Action for a Policy Jacket in Pending OTL Review Policy Status will only be enabled if the OTL Request was not approved***

2. On the **Policy Jacket Maintenance** screen select a general void reason in the Void Reason dropdown



Policy Jacket Maintenance

File Number: TestAgent2TX2

Jacket Type: T-2 (2014) Loan Policy of Title Insurance

Policy Number: 3166548-02342096

Void Reason: Please choose... ▼

Save Next Cancel

- Cancel button:** Click to close the **Policy Jacket Maintenance** screen and return to the **Jackets** tab on the file. The selected void reason will not be saved and status of the policy jacket will not be updated
- Save button:** Click to update the Policy Status of the policy jacket. **Policy Jacket Maintenance** screen will automatically close and return to the **Jackets** tab on the file
  - The Policy Status on the selected policy jacket will be updated to Voided and all Actions are disabled
  - If the policy jacket needs to be reinstated for any reason contact Agency Support to request the policy be unvoided. **[Refer to Subsection 1.06 in Section 2]**

Jacket Type	Policy Status	Policy Number	Policy Date	Actions
T-1R (2014) Residential Owner's Policy	Assigned	241-A66-02340778	08/30/2016	Edit   Send   View   Void
T-2 (2014) Loan Policy of Title Insurance	Assigned	176-A66-02340779	08/30/2016	Edit   Send   View   Void
T-2 (2014) Loan Policy of Title Insurance	Voided	3166548-02342096	09/13/2016	Edit   Send   View   Void

## 1.023 Void All Policy Jackets

- Click **Void All hyperlink** (Figure 26) to update all policy numbers Policy Status to Voided when the policy jackets are not needed and a confirmation message will display confirming you want to void all policy jackets
  - Hyperlink is only available on policy jackets in the Assigned Policy Status

Confirmation

Are you sure you want to void all policy jackets associated with this file?

Yes No

- No button:** Click to close the confirmation message and return to the **Jackets** tab on the file
- Yes button:** Click to proceed to the **Policy Jacket Maintenance** screen to select a general void reason for each policy jacket

- On the **Policy Jacket Maintenance** screen select a general void reason in the Void Reason dropdown

Policy Jacket Maintenance

File Number: TestAgent2TX2

Jacket Type: T-1R (2014) Residential Owner's Policy

Policy Number: 241-A66-02340778

Void Reason: Please choose... ▼

Save Next Cancel

- Cancel button:** Click to close the **Policy Jacket Maintenance** screen and return to the **Jackets** tab on the file. The selected void reason(s) will not be saved and status of the policy jacket(s) will not be updated
- Next button:** Click after a void reason is selected and until the Save button is enabled on the last policy jacket



- c. **Save button:** Click to update the policy status of the policy jacket(s). **Policy Jacket Maintenance** screen will automatically close and return to the **Jackets** tab on the file
- The Policy Status on all policy jackets will be updated to Voided and all Actions are disabled
  - If any one of the policy jackets need to be reinstated for any reason contact Agency Support to request the policy be unvoided. **[Refer to Subsection 1.06 in Section 2]**

File Info	CPL	Jackets	OTL
-----------	-----	---------	-----

Jackets

	Jacket Type	Policy Status	Policy Number	Policy Date	Actions
	T-2 (2014) Loan Policy of Title Insurance	Voided	3166548-02342096	09/19/2016	Edit   Send   View   Void
	T-1R (2014) Residential Owners Policy	Voided	241-A66-02340778	08/30/2016	Edit   Send   View   Void
	T-2 (2014) Loan Policy of Title Insurance	Voided	176-A66-02340779	08/30/2016	Edit   Send   View   Void

## 8 OTL Request Actions (View/Edit)

1. After creating an OTL Request you are automatically navigated to the **WFG File Services** screen, **OTL** tab where various Actions will be enabled for an OTL Request based upon the OTL Status
  - a. To locate a file record when not already on the **WFG File Services** screen navigate to the **WFG File Management** home screen *[Refer to Subsection 1.05 in Section 2]* and search for the file record to navigate to the OTL tab. *[Refer to Section 10]*

Figure 27 - WFG File Services Screen – OTL tab

**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: TestAgent2TX45 Property State: TEXAS

**Property Information**

Property Type: Residential

Address 1: 111 test avemie

Address 2:

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

Short Legal:

**OTL**

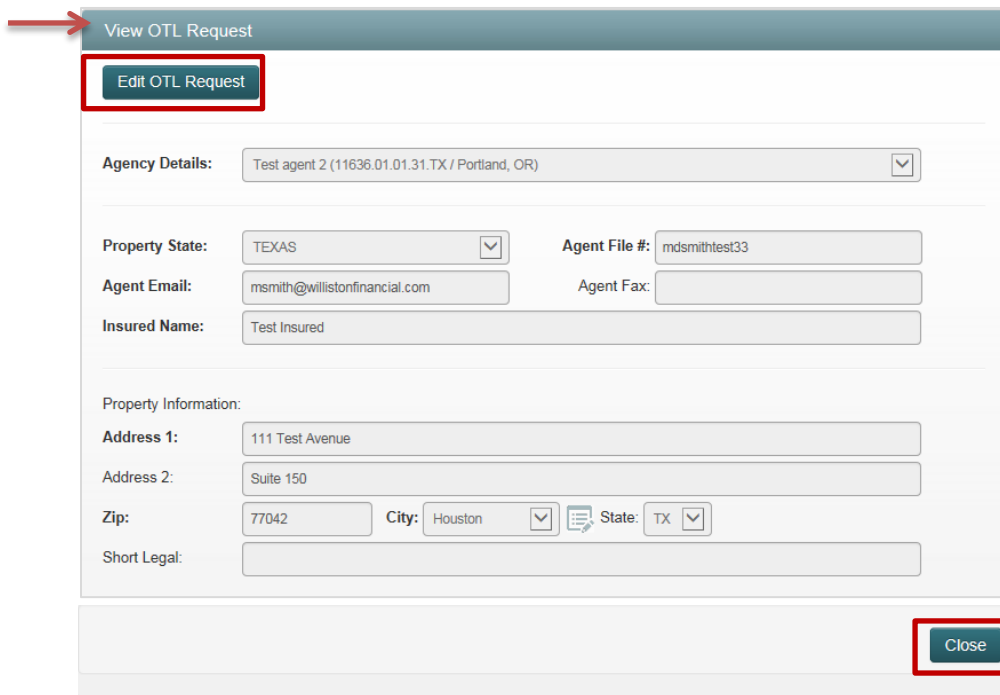
**Authorization Requests**

OTL Status	Lender Amount	Owner Amount	Document Number	Date Created	Actions
Incomplete			4564	02/28/2017	<a href="#">View</a>

### 1.024 View (Edit) OTL Request

1. Click **View hyperlink** (Figure 27) for the OTL Request to review or edit the current OTL Request information saved and the **View OTL Request** screen will display (Figure 28)
2. Click **Close button** and be navigated to the WFG File Services screen, **OTL** tab when done reviewing information
3. Click **Edit OTL Request button** to enable the **Update OTL Request** screen to review and/or edit OTL Request information

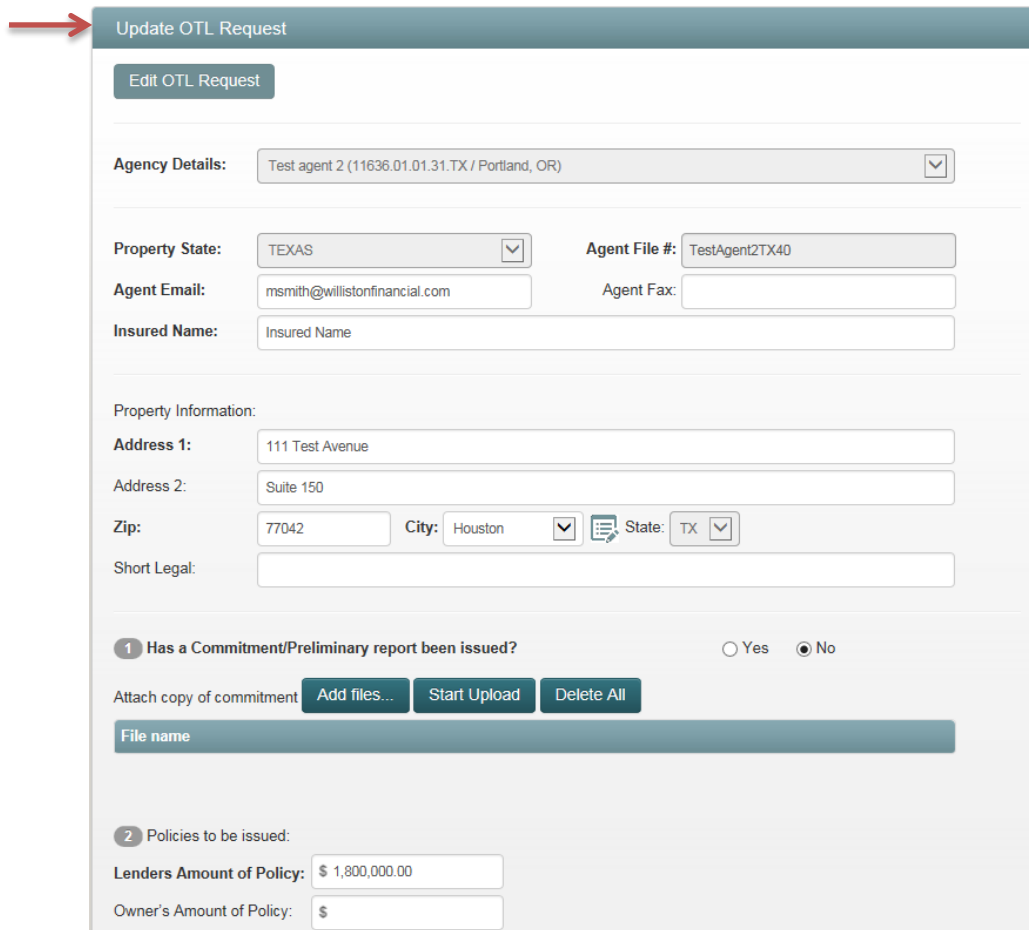
Figure 28 - View OTL Request Screen



The screenshot shows the 'View OTL Request' screen. A red arrow points to the title bar. A red box highlights the 'Edit OTL Request' button in the top left. Another red box highlights the 'Close' button in the bottom right. The form contains the following fields:

- Agency Details:** Test agent 2 (11636.01.01.31.TX / Portland, OR) [dropdown]
- Property State:** TEXAS [dropdown]
- Agent File #:** mdsmithtest33
- Agent Email:** msmith@willistonfinancial.com
- Agent Fax:** [empty]
- Insured Name:** Test Insured
- Property Information:**
  - Address 1:** 111 Test Avenue
  - Address 2:** Suite 150
  - Zip:** 77042
  - City:** Houston [dropdown]
  - State:** TX [dropdown]
  - Short Legal:** [empty]

Figure 29 - Update OTL Request Screen



The screenshot shows the 'Update OTL Request' screen. A red arrow points to the title bar. The form contains the following fields and sections:

- Agency Details:** Test agent 2 (11636.01.01.31.TX / Portland, OR) [dropdown]
- Property State:** TEXAS [dropdown]
- Agent File #:** TestAgent2TX40
- Agent Email:** msmith@willistonfinancial.com
- Agent Fax:** [empty]
- Insured Name:** Insured Name
- Property Information:**
  - Address 1:** 111 Test Avenue
  - Address 2:** Suite 150
  - Zip:** 77042
  - City:** Houston [dropdown]
  - State:** TX [dropdown]
  - Short Legal:** [empty]
- 1 Has a Commitment/Preliminary report been issued?** ☐ Yes ☒ No
- Attach copy of commitment** [Add files...] [Start Upload] [Delete All]
- File name** [empty text box]
- 2 Policies to be issued:**
  - Lenders Amount of Policy:** \$ 1,800,000.00
  - Owner's Amount of Policy:** \$ [empty]

**3 Brief description of property (offices, single family, etc):**

Single Family

**4 Is this transaction** ☒ Purchase ☐ Refinance ☐ Other

**5 Insured Interest:** ☒ Fee Simple ☐ Leasehold ☐ Other

**6 Does land abut an open, dedicated road?** ☒ Yes ☐ No

**7 Is the property to be insured subject to a potential encumbrance or loss of priority due to unfiled construction and/or mechanic's liens?** ☐ Yes ☒ No

**8 Is any portion of the property formerly railroad land?** ☐ Yes ☒ No

**9 Are there any potential Indian claim issues?** ☒ Yes ☐ No

**10 Are there any known creditors rights issues?** ☐ Yes ☒ No

**11 Is property affected by any type of water (beach, lake, wetland, marsh)?** ☒ Yes ☐ No

**12 Will you be giving survey coverage?** ☐ Yes ☒ No

**13 Will you be giving affirmative coverage or insuring any other unusual risks?** ☐ Yes ☒ No

**14 Endorsements Requested (attach copies if necessary):**

Add files... Start Upload Delete All

File name

**15 From our examination of the title and the above, it is our opinion that the Policy requested can be safely issued.** ☒ Yes ☐ No

Upload Other Files  
including the title search or any other supporting documents.

Add files... Start Upload Delete All

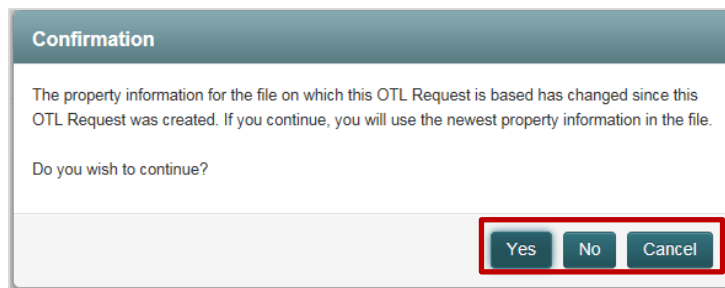
OTL Request 02-27-17 11:02.pdf

SysEmail 2017-02-27 11:02 - Request Submitted.pdf

Note

Update OTL Request Save and Close Cancel

- On the **Update OTL Request** screen (Figure 29) you may get a confirmation message notifying you that the property information on the file for which the OTL Request was created has changed



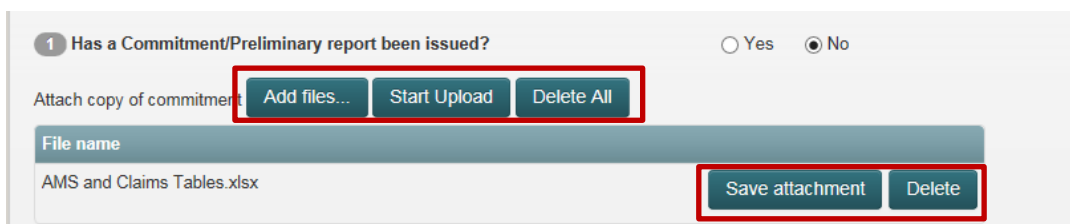
**Confirmation**

The property information for the file on which this OTL Request is based has changed since this OTL Request was created. If you continue, you will use the newest property information in the file.

Do you wish to continue?

Yes No Cancel

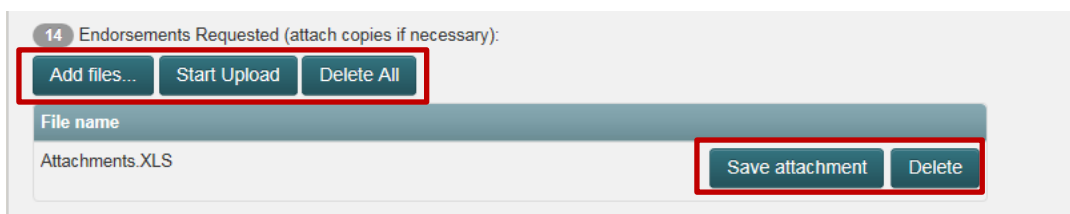
- a. **Cancel button:** Click to close the confirmation message, close out of Edit mode on the OTL Request and return to the **WFG File Services** screen, **OTL** tab
  - b. **No button:** Click to close the confirmation message and continue editing the OTL Request without the new property information (address) updates
  - c. **Yes button:** Click to close the confirmation message, update the property information (address); continue editing the OTL Request information as needed
5. On the **Update OTL Request** screen (Figure 29) update any questions by entering the requested information, selecting a radio button or uploading any documentation for Question 1, Question 14 or Upload Other Files; fields in bold are required
- a. To upload documents only and not update any other OTL Request information, click **Add files... button** for the question, select the document to upload, and once the File name is populated for the document(s) do the following
    - i. Click **Delete button** to remove the individual document added and not save it to the OTL Request
    - ii. Click **Delete All button** to remove all unsaved documents added and not save them to the OTL request
    - iii. Click **Save Attachment button** to attach and save the individual document added to the OTL Request
      1. Click **Cancel button** to return to the **WFG File Services** screen, **OTL** tab when you are finished adding documents
        - Once the document has been saved to the OTL Request it cannot be deleted
    - iv. Click **Start Upload button** to attach and save each of the added documents to the OTL Request
      1. Click **Cancel button** to return to the **WFG File Services** screen, **OTL** tab when you are finished adding documents
        - Once the documents have been saved to the OTL Request they cannot be deleted
  - b. If you want to save the attached documents and any updated OTL Request data as well, click the **Update OTL Request button [Refer to Step 7 below]**



**1** Has a Commitment/Preliminary report been issued? ☐ Yes ☒ No

Attach copy of commitment **Add files...** **Start Upload** **Delete All**

File name	Save attachment	Delete
AMS and Claims Tables.xlsx		



**14** Endorsements Requested (attach copies if necessary):

**Add files...** **Start Upload** **Delete All**

File name	Save attachment	Delete
Attachments.XLS		

Upload Other Files  
including the title search or any other supporting documents.

**Add files...** **Start Upload** **Delete All**

OTL Request 02-27-17 11:36.pdf

SysEmail 2017-02-27 11:36 - Request Submitted.pdf

Attachments.XLS **Save attachment** **Delete**

6. Click **Cancel button** at any time to close the **Update OTL Request** screen and be navigated to the **WFG File Services** screen, **OTL** tab; any data edited will not be saved and the OTL Status will remain unchanged. Any documents that were added and saved by clicking the **Save Attachment button** or **Start Upload button** will be saved

**File Info** **CPL** **Jackets** **OTL**

Authorization Requests

OTL Status	Lender Amount	Owner Amount	Document Number	Date Created	Actions
Pending UW Review	\$ 1,800,000.00		4560	02/27/2017	<a href="#">View</a>

7. **Incomplete OTL Status request only** - Click **Save and Close button** and if all required information in the top portion of the screen (above questions 1-15) is entered a confirmation message will display confirming you want to save the OTL Request and return at a later time

**Confirmation**

Save OTL request information and return at a later time?

**Yes** **Cancel**

- Cancel button:** Click to return to the **Update OTL Request** screen to continue with entering the OTL Request data
- Yes button:** Click to close the **Update OTL Request** screen, save the entered data and attached documents in the Incomplete OTL Status, and be navigated to the **WFG File Services** screen, **OTL** tab
  - The saved data can be accessed at a later time for completion by selecting the View action for that OTL request on the file as indicated in this section
  - The OTL Status will be Incomplete and may remain that way for 180 days or the OTL Status will be systematically updated to Void. Notify Agency Support to have the OTL Request manually voided if the transaction is not going to move forward. **[Refer to Subsection 1.06 in Section 2]**

**File Info** **CPL** **Jackets** **OTL**

Authorization Requests

OTL Status	Lender Amount	Owner Amount	Document Number	Date Created	Actions
Incomplete			4564	02/28/2017	<a href="#">View</a>

8. Click **Update OTL Request button** and if all required information is entered a confirmation message will display confirming you want to submit the updated OTL Request

Confirmation

Submit Updated Over the Limit Request?

Yes

Cancel

- a. **Yes button:** Click and a notification message indicating the over the limit request was submitted for review will display {Message 1 displays for all OTL Requests in all OTL Statuses except Incomplete and Message 2 will display for all OTL Requests in OTL Status Incomplete only}

Message

Updated Over the Limit Request Was Submitted For Review.

OK

Or

Message

Over the Limit Request Was Submitted For Review.

OK

- i. Click **OK button** to close the **Update OTL Request** screen, save the entered data, and be navigated to the **WFG File Services** screen, **OTL** tab
  1. A notification email is automatically sent to the Agency Representative and WFG Underwriting indicating an updated OTL Request was submitted and is pending their review
  2. The OTL Status will be Pending UW Review until reviewed by WFG Underwriting and the status updated to Approved, Not Approved, Additional Info Required or Pending Senior UW Review. The OTL Request can be edited at any time prior to the status being updated by clicking on the View action. *[Refer to Subsection 1.024 in Section 8]*

File Info

CPL

Jackets

OTL

Authorization Requests

OTL Status	Lender Amount	Owner Amount	Document Number	Date Created	Actions
Pending UW Review	\$ 1,800,000.00		4560	02/27/2017	<a href="#">View</a>

## 9 Create a new File Record (No Existing Services)

1. After you login in you will be viewing the **WFG File Management** home screen. *[Refer to Subsection 1.01 and 1.02 in Section 2]* You can select the desired agency from the dropdown at this point or on the **WFG File Services** screen which appears next. Note an Agency may default for you if your user login account was established with access to only a single account number
  - a. Click **Create New File** hyperlink on the top right side of the WFG File Management window or under the Search Existing Files section to display the **WFG File Services** screen

WFG File Management

Create New File

Agency Details

Agency: Please choose... Underwriter: State:

Search Existing Files

File Number Date Created: From mm/dd/yyyy To mm/dd/yyyy

Search Clear

Create New File

File Status Filter: Open

2. If an agency was not selected in the previous step on the **WFG File Management** screen, select one in the Agency Details dropdown now on the **WFG File Services** screen (Figure 32) and enter the File Information and Property Information; fields in bold are required
  - **File Number:** The file number entered will be verified against other file number records saved for the Agency selected. If an existing matching file number is located a notification message will be displayed indicating that the entered file number already exists
    - File numbers will not be considered a match if there are spaces or additional characters (e.g. Test 123 is not the same file number as Test123 or Test123 is not the same as Test123a)

Message

The file number entered already exists. Click OK to automatically navigate to the **WFG File Management** screen to locate the existing file and any existing services created.

OK Cancel

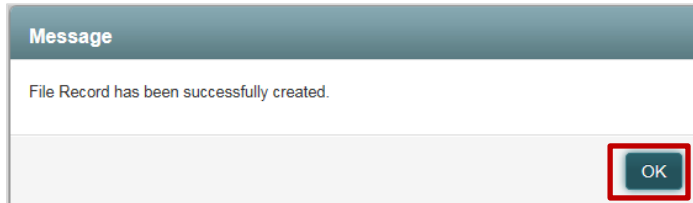
- Click **Cancel** button to close the message and return to the **WFG File Services** screen (Figure 32) to edit the file number entered as needed
- Click **OK** button to close the message and you will automatically be navigated to the **WFG File Management** screen with the file number located and displayed in the Existing File Summary section (Figure 33) for your review
  - If a previously saved file number was entered incorrectly contact Agency Support for assistance to have the file number updated as needed *[Refer to Subsection 1.06 in Section 2]*



3. Click **Cancel button** at any time to close the **WFG File Services** screen and be navigated back to the **WFG File Management** screen; any data entered will not be saved
4. Click **Create File button** to save the entered data
  - If there are any errors a validation flag will display next to or below the errored field(s) that briefly describe the error; all errors must be fixed to continue



- a. If there were no errors a notification message will display indicating that the file record was successfully created



- i. Click **OK button** to be returned to the WFG File Services screen, **File Info** tab now displayed on the lower portion of the screen
- b. Click on the **CPL** tab, **Jackets** tab and/or **OTL** tab as needed to add a new service using the Generate New Letter button, Generate New Jacket button or Create OTL Request button
- c. To return to the **WFG File Management** home screen click the **Search Existing Files** hyperlink in the top right corner of the **WFG File Services** screen or click the **WFG Agent logo** [Refer to Subsection 1.05 in Section 2]

Figure 30 - WFG File Services Screen

 The screenshot shows the "WFG File Services" screen. At the top is a blue header bar with "WFG File Services" on the left and "Search Existing Files" on the right. Below the header is the "File Information" section, which includes a dropdown for "Agency Details" (selected: "Test agent 2 (11636.01.01.31.TX / Portland, OR)"), a dropdown for "File Status" (selected: "Open"), a text field for "File Number", and a dropdown for "Property State" (selected: "TEXAS"). Below this is the "Property Information" section, which includes a dropdown for "Property Type" (selected: "Residential"), text fields for "Address 1" and "Address 2", a text field for "Zip", a dropdown for "City" (selected: "Please choo"), a dropdown for "State" (selected: "TX"), a dropdown for "County" (selected: "Please choo"), and a text field for "Short Legal". At the bottom left are two buttons: "Create File" and "Cancel".

Figure 31 - WFG File Management Screen - Search Mode

WFG File Management

Create New File

Agency Details

Agency:

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

Underwriter:

WFG National Title Insurance Company

State:

TX

Search Existing Files

File Number

TestAgent2TX42

Date Created:

From

mm/dd/yyyy

To

mm/dd/yyyy

Search

Clear

Create New File

File Status Filter: Open

Existing File Summary

1 of 1 ( 1 items )

	File Number	File Status	Date Created	Property Address	Borrower/Buyer
	TestAgent2TX42	Open	02/27/2017	, TX	

## 10 File Record – Locate File/Locate Services/Update File

### 1.025 Search for a File Record

1. After you login in you will be viewing the **WFG File Management** home screen. *[Refer to Subsection 1.01 and 1.02 in Section 2]* If your user login account was established with access to only a single account number the agency dropdown will be prepopulated. If the agency dropdown is not prepopulated it is not necessary to select the desired agency from the dropdown for search purposes

WFG File Management [Create New File](#)

**Agency Details**

Agency:  Underwriter: State:

**Search Existing Files**

File Number  Date Created: From  To

Create New File

File Status Filter:

#### a. Search for All File Numbers

- i. Select an agency in the agency dropdown, click **Search button** to display the **Existing File Summary** grid with file number information populated

WFG File Management [Create New File](#)

**Agency Details**

Agency:  Underwriter: WFG National Title Insurance Company State: TX

**Search Existing Files**

File Number  Date Created: From  To

Create New File

File Status Filter:

**Existing File Summary** 1 of 6 ( 51 items )

	File Number	File Status	Date Created	Property Address	Borrower/Buyer
<input type="checkbox"/>	TestAgent2TX45	Open	02/27/2017	111 test avemie Houston, TX 77042	
<input type="checkbox"/>	TestAgent2TX38	Open	02/27/2017	, TX	
<input type="checkbox"/>	TestAgent2TX42	Open	02/27/2017	, TX	
<input type="checkbox"/>	TestAgent2TX41	Open	02/27/2017	111 Test Avenue Houston, TX 77042	
<input type="checkbox"/>	TestAgent2TX40	Open	02/27/2017	111 Test Avenue Houston, TX 77042	

#### ii. To reduce the number of file records

1. Enter a partial file number in the Search Existing Files search field adjacent to File Number value, click **Search button** again to repopulate the **Existing File Summary** grid
2. Choose a value other than Open in the **File Status Filter**

- ii. To sort information in the **Existing File Summary** grid
  1. Click on the following labels File Number, File Status or Date Created
    - a. Down arrow displayed will sort descending
    - b. Up arrow displayed will sort ascending
- b. **Search for a Single File Number**
  - i. Select an agency (other than defaulted agency) in the agency dropdown (Optional)
    - o To conduct a wider search do not select an agency in the dropdown if you are unsure which agency the file number belongs
  - ii. File Number is defaulted in the Search Existing Files dropdown, enter the file number value you wish to search for in the adjacent field
    - o File numbers will not be considered a match if there are spaces or additional characters (e.g. Test 123 is not the same file number as Test123 or Test123 is not the same as Test123a)
    - o Enter partial file number for a wider search and full file number for a smaller search
  - iii. Enter Date Created From and To (Optional)
    - o To conduct a wider search it is best to leave fields blank if unsure of the date range created
  - iv. Select File Status in the File Status Filter (Optional)
    - o To conduct a wider search leave the defaulted value Open, to conduct a smaller search update the selection to an alternate file status
  - v. Click **Search button** to display the **Existing File Summary** grid with file number information populated
  - vi. To reduce the number of file records
    1. Enter a partial file number in the Search Existing Files search field adjacent to File Number value, click **Search button** again to repopulate the **Existing File Summary** grid
    2. Choose an agency in the Agent Filter if one is not defaulted
    3. Choose a value other than Open in the **File Status Filter**

The screenshot displays the WFG File Management interface. At the top, there's a header with 'WFG File Management' and a 'Create New File' link. Below this is the 'Agency Details' section with a dropdown for 'Agency' and fields for 'Underwriter' and 'State'. The 'Search Existing Files' section includes a 'File Number' dropdown, a text input field containing 'testagent', and 'Date Created' fields with 'From' and 'To' date pickers. A red box highlights the 'Search' and 'Clear' buttons. Below the search section is the 'Create New File' section with a 'File Status Filter' dropdown set to 'Open' and an 'Agent Filter' dropdown. A red box highlights the 'Agent Filter' dropdown, which shows a list of agents. Below this is the 'Existing File Summary' section, which contains a table with columns: File Number, File Status, Date Created, Property Address, and Borrower/Buyer. A red arrow points to the first row of the table. A red box highlights the pagination controls at the bottom right of the table, showing '1 of 3 ( 23 items )'.

	File Number	File Status	Date Created	Property Address	Borrower/Buyer
+	TestAgent2TX45	Open	02/27/2017	111 test avemie Houston, TX 77042	
+	TestAgent2TX38	Open	02/27/2017	, TX	
+	TestAgent2TX42	Open	02/27/2017	, TX	
+	TestAgent2TX41	Open	02/27/2017	111 Test Avenue Houston, TX 77042	
+	TestAgent2TX40	Open	02/27/2017	111 Test Avenue Houston, TX 77042	

2. Click **Clear button** at any time to reset/clear the **WFG File Management** screen of any search criteria entered and close the **Existing File Summary** grid if populated
3. Navigate through the Existing File Summary grid values by using the pagination arrows

## 1.026 Locate Services for a File Record

1. Locate the file record on the **WFG File Management** screen [*Refer to Subsection 1.025 above*] and choose a locate service option below that best suits your needs (1a or 1b)
  - a. In the **Existing File Summary** section click the **File Number hyperlink** (Figure 32 – Orange Arrow) to automatically navigate to the **WFG File Services** screen, **File Info** tab, then click the individual service tabs {File Info, CPL, Jackets, OTL} to review the information generated for each service (Figure 33)

Figure 32 - WFG File Management Screen - Existing File Summary Grid

WFG File Management [Create New File](#)

**Agency Details**

Agency:  Underwriter: State:

**Search Existing Files**

File Number:  Date Created: From  To

**Create New File**

File Status Filter:  Agent Filter:

**Existing File Summary** 1 of 1 ( 1 items )

File Number	File Status	Date Created	Property Address	Borrower/Buyer
<a href="#">TestAgent2TX46</a>	Open	02/28/2017	111 test Houston, TX 77042	test

Figure 33 - WFG File Services Screen - With Services

WFG File Services [Search Existing Files](#)

**File Information**

Agency Details:

File Status:  File Number:  Property State: TEXAS

**Property Information**

Property Type:

Address 1:

Address 2:

Zip:  City:  State:  County:

Short Legal:

**File Info** **CPL** **Jackets** **OTL**

**Property Location Details**

Property Type: Residential

Address: 111 test  
Houston, TX 77042  
Harris

Short Legal:

- b. In the **Existing File Summary** section click the plus sign next to the file number (Figure 32 – Blue Arrow) to review which services have been created on the file record {File Information, Closing Protection Letter, Policy Jacket, OTL Authorization Request} (Figure 34), click on a **Service Name hyperlink** to automatically navigate to the **WFG File Services** screen tab for the service selected (Figure 35)

Figure 34 - WFG File Management Screen - Existing Services Grid

WFG File Management [Create New File](#)

**Agency Details**

Agency:  Underwriter:  State:

**Search Existing Files**

File Number:  Date Created: From  To

[Create New File](#)

File Status Filter:  Agent Filter:

**Existing File Summary** 1 of 1 ( 1 items )

	File Number	File Status	Date Created	Property Address	Borrower/Buyer
	TestAgent2TX46	Open	02/28/2017	111 test Houston, TX 77042	test

**Existing Services**

Service Name	Date Created	Created By
<a href="#">File Information</a>	02/28/2017	CplWebTestAcct
<a href="#">Closing Protection Letter</a>	02/28/2017	CplWebTestAcct
<a href="#">Policy Jacket</a>	02/28/2017	CplWebTestAcct
<a href="#">OTL Authorization Request</a>	02/28/2017	CplWebTestAcct

[Create New Service](#)

Figure 35 - WFG File Services Screen – Service Tabs

WFG File Services [Search Existing Files](#)

**File Information**

Agency Details:

File Status:  File Number:  Property State:

**Property Information**

Property Type:

Address 1:

Address 2:

Zip:  City:  State:  County:

Short Legal:

**File Info** **CPL** **Jackets** **OTL**

**Letters** [Cancel All](#)

	Letter Type	Letter Status	Lender Name	Letter Number	Actions
	Lender	Assigned	Acopia, LLC.	035ECA49	<a href="#">Cancel</a>   <a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">View</a>

## 1.027 Update File Record Information

1. Locate the file record on the **WFG File Management** screen [*Refer to Subsection 1.025 above*], click the **File Number hyperlink** in the **Existing File Summary** section (Figure 36) to automatically navigate to the **WFG File Services** screen, **File Info** tab (Figure 37)

Figure 36 - WFG File Management Screen - Existing File Summary

WFG File Management [Create New File](#)

**Agency Details**

Agency:  Underwriter: State:

**Search Existing Files**

File Number:  Date Created: From  To

Create New File

File Status Filter:  Agent Filter:

**Existing File Summary** 1 of 1 ( 1 items )

	File Number	File Status	Date Created	Property Address	Borrower/Buyer
	<a href="#">TestAgent2TX46</a>	Open	02/28/2017	111 test Houston, TX 77042	test

Figure 37 - WFG File Services Screen - File Info

WFG File Services [Search Existing Files](#)

**File Information**

Agency Details:

File Status:  File Number:  Property State: TEXAS

**Property Information**

Property Type:

Address 1:

Address 2:

Zip:  City:  State:  County:

Short Legal:

**File Info**

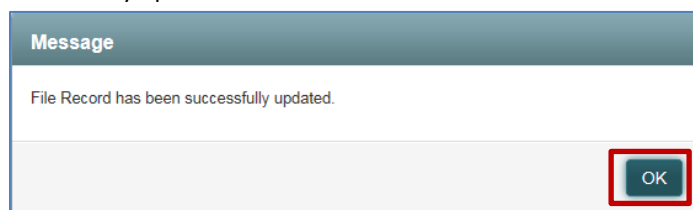
**Property Location Details**

Property Type: Residential

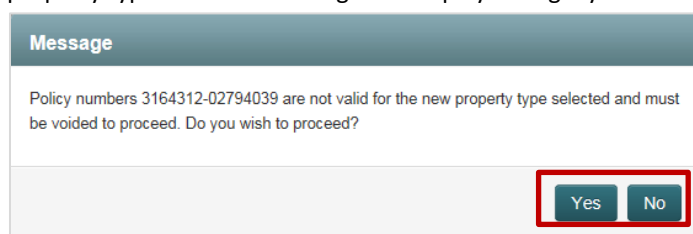
Address: 111 test  
Houston, TX 77042  
Harris

Short Legal:

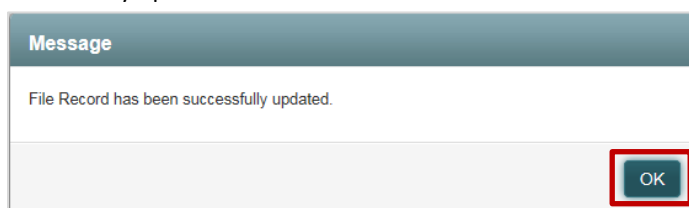
2. Click **Edit button** on the top portion of the screen to enable all fields where edits are allowed on the file record. Update the Property Type and any other file information as needed; fields in bold are required
3. Click **Cancel button** to close the file record and any data edited will not be saved
4. When the file record information is updated, click **Save button**
  - a. If the property type was updated and there are no policy jackets generated on the file that are invalid for the new property type, the file record will be saved and a notification message is displayed that the file was successfully updated



- i. Click **OK button** to close the notification message
    1. Any existing closing protection letters, policy jackets or OTL Requests on the file will automatically be updated to reflect the change in property type
- b. If the property type was updated and there are policy jackets generated on the file that are invalid for the new property type an action message will display asking if you want to have the invalid policy jacket(s) voided

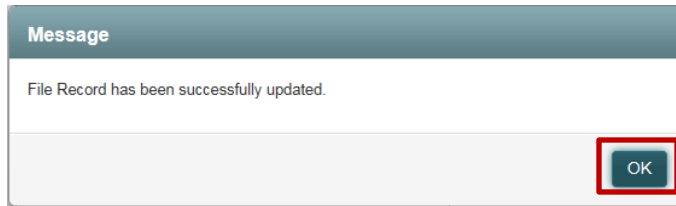


- i. **No button:** Click to close the action message and return to the file record in Edit mode, click **Cancel button** as necessary to exit Edit mode
  - ii. **Yes button:** Click to close the action message and return to the file record in Edit mode, click **Save button** and the file record will be saved and a notification message is displayed that the file was successfully updated

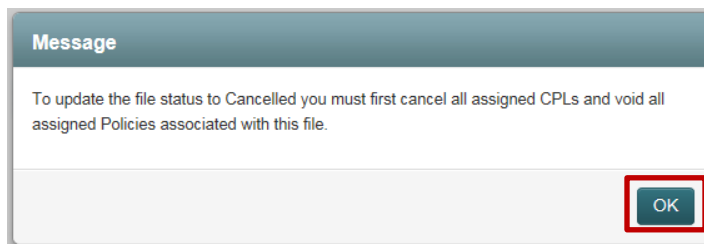


- ii. Click **OK button** to close the notification message
    1. **The system will automatically update the policy status on the invalid policy jacket(s) to Voided, click on the Jackets tab as needed to review.**
    2. Any existing closing protection letters or OTL Requests on the file will automatically be updated to reflect the change in property type
    3. As needed, new Policy Jacket(s) will need to be generated under the new Property Type
- c. If the File Status is updated to **Opened In Error** there were no services (CPL/Jacket/OTL) generated on the file. The file record will be saved and a notification message is displayed that the file was successfully updated





- i. Click **OK button** to close the notification message
  1. The file record can be edited again to update the File Status to **Open** as needed
- d. If the File Status is updated to **Cancelled** there were services (CPL/Jacket/OTL) generated on the file and if the service(s) are not cancelled (CPL), voided (Jacket or OTL) the file status cannot be updated until the service(s) are updated, A notification message is displayed indicating all assigned CPL's and Policies must be addressed to update the File Status to Cancelled.



- i. Click **OK button** to close the notification message
- ii. Navigate to the CPL and/or Jackets tab and Cancel or Void any Assigned status services [*Refer to Section 6, Subsection 1.014 to Cancel CPL and/or Section 7, Subsection 1.022 to Void Jacket*] and when completed Edit the file and update the File Status once again
- iii. No validation is currently in place for OTL Requests in the Pending OTL Review or Incomplete OTL Status, therefore as long as the CPL and Jacket(s) are addressed the File Status can be updated
  1. If the OTL Status is Incomplete and the Void action is available, proceed to Void the OTL Request by clicking on the Void link
- ii. At this time the file record cannot be edited again to update the File Status to back to **Open**. Contact Agency Support if assistance is needed to reactivate the file record [*Refer to Section 2, Subsection 1.06 or 1.07*]

## 11 WFG Remittance Report Creation

1. After you login in you will be viewing the **WFG File Mangement** home screen *[Refer to Subsection 1.025 above]*. You can select the desired agency from the dropdown at this point **or** on the **Remittance Report** screen which appears next. Note an Agency may default for you if your user account was established with access to only a single account number
  - a. Hover over the **Reports/Services** tab, select **Remittance Report** to display the **Remittance Report** screen

WFG AGENT  
powered by Williston Financial Group

Welcome, CplWebTest Acct [Sign Out](#)

Create View Contact Us **Reports/Services**

UAT Environment: For Internal Testing Only

WFG File Management

**Agency Details**

Agency:  Underwriter: State:

**Search Existing Files**

File Number  Date Created: From  To

Create New File

File Status Filter:

2. If an agency was not selected in the previous step on the **WFG File Management** screen, select one in the Agency Details dropdown now on the **Remittance Report** screen; fields in bold are required
  - Select All Agencies value in the Agency Details dropdown to run the remittance report for all agencies for which your user account has access and populate into one Excel file

Remittance Report [Search Existing Files](#)

**Agency Details:**  **User Name:** CplWebTestAcct

**Date Type:**  **Start Date:**  **End Date:**

☐ Include Remitted Policies ☐ Exclude Endorsements ☐ Exclude CPL

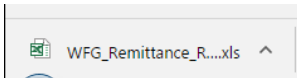
- a. **Date Type:** Select a date type
  - i. **Policy Date:** Effective date of the policy as entered in the Policy Date field for the policy jacket in Policy Jacket Generator
  - ii. **Generated Date:** Actual date the policy(ies) were created in Policy Jacket Generator

- b. **State Date:** Enter the earliest Policy date or Actual date of assigned policies to search for
  - c. **End Date:** Enter the latest Policy date or Actual date of assigned policies to search for
  - d. **Include Remitted Policies:** Check the box to include already remitted policies into the report (Optional). This box is typically left unchecked
  - e. **Exclude Endorsements:** Check the box to exclude endorsements from the report (Optional). This box is typically left unchecked
  - f. **Exclude CPL:** Check the box to exclude closing protection letters from the report (Optional). This box is typically left unchecked
3. Click **Clear button** at any time to reset/clear the **Remittance Report** screen of any report criteria entered
  4. Click **Excel button** to search for the assigned policies and related endorsements and/or CPL's for all file numbers for the report criteria entered
    - a. All policy information entered at the time of policy jacket generation necessary for policy remittance is populated into an Excel spreadsheet named WFG\_Remittance\_Report (Figure 38)
      - o The information contained in the Excel spreadsheet (a.k.a WFG\_Remittance\_Report can be edited as needed before submission to
    - b. The generated WFG\_Remittance\_Report file notification will display differently depending on the web browser used

**Internet Explorer – Displayed at the bottom middle of the screen, select Open or Save**



**Chrome - Displayed at the bottom left of the screen, click to Open**



*Figure 38 - WFG Remittance Report Example*

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1																
2		<b>WFG Remittance Report</b> Criteria: CAID: 5100 Test agent 2 (11636.01.01.31.TX / Portland, OR) Start Date: 02/01/2017, End Date: 03/31/2017,														
3																
4																
5																
6																
7																
8																
9	AgentID	AgentFileNumber	PolicyNumber	PolicyDate	LineType	LiabilityAmount	GrossPremium	NetRemittance	PolicyTaxesFees	StatisticalCode	PropertyType	PropertyAddress	PropertyCity	PropertyCounty	PropertyState	PropertyZip
10	11636.01.01.31.TX	20170206T0404CE	545-A66-0279437	02/15/2017	BASIC	150000.00	0.00	0.00	0.00	0.00	Residential	785 Elm Street	Piano	Collin	TX	75025
11	11636.01.01.31.TX	TestAgent2TX10	103-A66-02794140	02/15/2017	BASIC	150.00	150.00	0.00	1000	0.00	Residential	123 Test Avenue Sult Houston	Harris	TX	77042	
12	11636.01.01.31.TX	TestAgent2TX10	103-A66-02794140	02/15/2017	ENDORSEMENT	0.00	22.50	22.50	0.00	0500-T-3	Residential	123 Test Avenue Sult Houston	Harris	TX	77042	
13	11636.01.01.31.TX	TestAgent2TX10	103-A66-02794140	02/15/2017	ENDORSEMENT	0.00	7.50	7.50	0.00	0501-T-3	Residential	123 Test Avenue Sult Houston	Harris	TX	77042	
14	11636.01.01.31.TX	TestAgent2TX24	103-A66-02794142	02/14/2017	BASIC	200000.00	200.00	200.00	0.00	1002	Residential	111 Test Avenue Sult Houston	Harris	TX	77042	
15	11636.01.01.31.TX	TestAgent2TX24	103-A66-02794142	02/14/2017	ENDORSEMENT	0.00	50.00	50.00	0.00	0550-T-3	Residential	111 Test Avenue Sult Houston	Harris	TX	77042	
16	11636.01.01.31.TX	TestAgent2TX24	3167048-02794141	02/14/2017	SMULTANEUS	150000.00	250.00	250.00	0.00	3000	Residential	111 Test Avenue Sult Houston	Harris	TX	77042	
17	11636.01.01.31.TX	TestAgent2TX24	3167048-02794141	02/14/2017	ENDORSEMENT	0.00	20.00	20.00	0.00	0140-T-33	Residential	111 Test Avenue Sult Houston	Harris	TX	77042	
18	11636.01.01.31.TX	TestAgent2TX24	3167048-02794141	02/14/2017	ENDORSEMENT	0.00	0.00	0.00	0.00	0141-T-33	Residential	111 Test Avenue Sult Houston	Harris	TX	77042	
19	11636.01.01.31.TX	TestAgent2TX24	3167048-02794141	02/14/2017	CPL	0.00	0.00	0.00	0.00		Residential	111 Test Avenue Sult Houston	Harris	TX	77042	
20	11636.01.01.31.TX	TestAgent2TX32	3166548-02794159	02/23/2017	BASIC	150000.00	0.00	0.00	0.00		Residential	111 Test Avenue Sult Houston	Harris	TX	77042	
21	11636.01.01.31.TX	TestAgent2TX34	103-A66-02794157	02/24/2017	BASIC	150000.00	0.00	0.00	0.00	1250	Residential	111 Test Avenue Sult Houston	Harris	TX	77042	
22	11636.01.01.31.TX	TestAgent2TX34	3166548-02794150	02/24/2017	SMULTANEUS	150000.00	0.00	0.00	0.00		Residential	111 Test Avenue Sult Houston	Harris	TX	77042	
23	11636.01.01.31.TX	TestAgent2TX39	103-A66-02794169	02/25/2017	BASIC	2500.00	0.00	0.00	0.00	1290	Residential	4444 Test Avenue Sult Houston	Harris	TX	77042	
24	11636.01.01.31.TX	TestAgent2TX46	103-A66-02794172	02/28/2017	BASIC	50000.00	0.00	0.00	0.00	1250	Non-Residential	111 Test	Houston	Harris	TX	77042
25	11636.01.01.31.TX	TestAgent2TX46	103-A66-02794172	02/28/2017	ENDORSEMENT	0.00	50.00	50.00	0.00	0152-T-31.1	Non-Residential	111 Test	Houston	Harris	TX	77042
26	11636.01.01.31.TX	TestAgent2TX46	103-A66-02794172	02/28/2017	ENDORSEMENT	0.00	0.00	0.00	0.00	0400-T-3	Non-Residential	111 Test	Houston	Harris	TX	77042
27	11636.01.01.31.TX	TestAgent2TX46	103-A66-02794172	02/28/2017	ENDORSEMENT	0.00	0.00	0.00	0.00	0500-T-3	Non-Residential	111 Test	Houston	Harris	TX	77042
28	11636.01.01.31.TX	TestAgent2TX46	103-A66-02794172	02/28/2017	ENDORSEMENT	0.00	50.00	50.00	0.00	0550-T-3	Non-Residential	111 Test	Houston	Harris	TX	77042
29	11636.01.01.31.TX	TestAgent2TX46	103-A66-02794172	02/28/2017	ENDORSEMENT	0.00	0.00	0.00	0.00	0600-T-12	Non-Residential	111 Test	Houston	Harris	TX	77042
30	11636.01.01.31.TX	TestAgent2TX46	103-A66-02794172	02/28/2017	ENDORSEMENT	0.00	0.00	0.00	0.00	0605-T-24.1	Non-Residential	111 Test	Houston	Harris	TX	77042
31	11636.01.01.31.TX	TestAgent2TX46	103-A66-02794172	02/28/2017	ENDORSEMENT	0.00	100.00	100.00	0.00	0606-T-25.1	Non-Residential	111 Test	Houston	Harris	TX	77042
32	11636.01.01.31.TX	TestAgent2TX46	103-A66-02794172	02/28/2017	ENDORSEMENT	0.00	0.00	0.00	0.00	0620-T.4	Non-Residential	111 Test	Houston	Harris	TX	77042
33	11636.01.01.31.TX	TestAgent2TX46	103-A66-02794172	02/28/2017	ENDORSEMENT	0.00	0.00	0.00	0.00	0689-T-19.1	Non-Residential	111 Test	Houston	Harris	TX	77042
34	11636.01.01.31.TX	TestAgent2TX9	103-A66-02794139	02/15/2017	BASIC	150000.00	0.00	0.00	0.00	1005	Residential	123 Test Avenue Sult Houston	Harris	TX	77042	
35	11636.01.01.31.TX	TestAgent2TX9	3166548-02794139	02/15/2017	SMULTANEUS	200000.00	250.00	250.00	0.00	0030	Residential	123 Test Avenue Sult Houston	Harris	TX	77042	
36	11636.01.01.31.TX	TestAgent2TX9	3166548-02794139	02/15/2017	ENDORSEMENT	0.00	0.00	0.00	0.00	0143-T-33.1	Residential	123 Test Avenue Sult Houston	Harris	TX	77042	
37	11636.01.01.31.TX	TestAgent2TX9	3166548-02794139	02/15/2017	ENDORSEMENT	0.00	50.00	50.00	0.00	0151-T-31.1	Residential	123 Test Avenue Sult Houston	Harris	TX	77042	
38	Column Totals:						1200.00	1200.00								

5. The completed WFG\_Remittance\_Report should be submitted to the WFG Agency Services Department

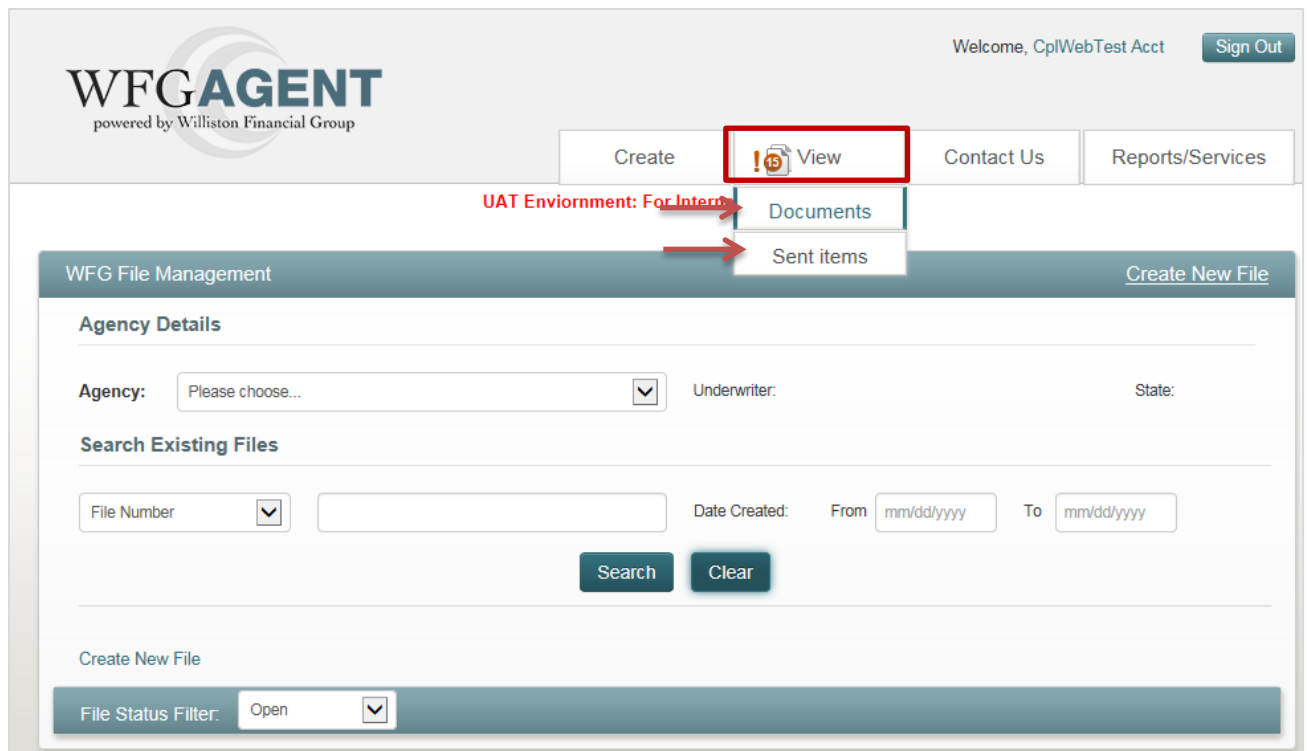
- Email Address: [WFGRemittances@wfgnationaltitle.com](mailto:WFGRemittances@wfgnationaltitle.com)
- Mailing Address: 12909 SW 68<sup>th</sup> Parkway, Suite 350, Portland, OR 97223

## 12 View Tab - Documents / Sent Items

### 1.028 Documents Screen – View, Edit, Send, Void Actions

1. After you login in you will be viewing the **WFG File Management** home screen. *[Refer to Subsection 1.025 above]* You can select the desired agency from the dropdown at this point or on the **Documents** screen which appears next. Note an Agency may default for you if your user account was established with access to only a single account number
  - a. Hover over the **View** tab, select **Documents** to display the **Documents** screen (Figure 39)
    - o The **Documents** screen can be utilized in lieu of locating a file record on the **WFG File Management** screen to perform the same actions {Edit, Send, View, Void} *[Refer to Section 6 for CPL actions and Section 7 for Policy Jacket actions]*

Figure 39 - WFG File Management Screen - View Tab



2. On the **Documents** screen (Figure 40) depending on the Agency selected in the Agency Details dropdown the last 10 services (CPL and/or Policy Jacket) based upon the most current Date Created will populate in the **Search Documents** grid on the lower portion of the screen
  - If no Agency is selected in the Agency Details dropdown the last 10 services based upon the most current Date Created will be populated for any agency for which your user account has access
  - b. To reduce the number of file records populated enter one **or** more search criteria, click **Search button** to repopulate the **Search Documents** grid
    - i. **Agency Details:** Select an Agency in the dropdown
    - ii. **File Number:** Enter a full or partial file number
    - iii. **Document Type:** Select a document type in the dropdown (Default value is All)
    - iv. **Status:** Select a document status in the dropdown (Default value is All)
    - v. **Letter/Policy Number:** Enter a full or partial policy number **or** CPL letter number
    - vi. **Borrower/Buyer:** Enter a full or partial borrower/buyer name
    - vii. **Date Created From/To:** Enter a date in each field for the date the service was created/generated
  - c. To sort information in the **Search Documents** grid

- i. Click on the following labels Status, Letter/Policy Number, File Number or Date Created
    1. Down arrow displayed will sort descending
    2. Up arrow displayed will sort ascending
  - d. Click on an available Action hyperlink {View, Edit, Void, Send} as needed to perform those actions **[Refer to Section 6 for CPL actions and Section 7 for Policy Jacket actions]**
3. Click **Clear button** at any time to reset/clear the **Documents** screen of any search data entered
4. Navigate through the Search Documents grid values by using the pagination arrows

Figure 40 - Documents Screen

The screenshot shows the 'Documents' screen with a search bar at the top. Below the search bar are filters for Agency Details, Document Type, Status, File Number, Letter/Policy Number, Borrower/Buyer, and Date Created. A 'Search' button and a 'Clear' button are located below the filters. Below the filters is a table with columns: Status, Letter/Policy Number, File Number, Borrower/Buyer, City, State, Date Created, and Action. The table contains 10 rows of data. At the bottom of the table is a pagination bar showing '1 of 1' and '( Total rows: 10 )'.

Status	Letter/Policy Number	File Number	Borrower/Buyer	City	State	Date Created	Action
Assigned	103-A66-02794172	TestAgent2TX46		Houston	TX	02/28/2017 22:56:25	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Void</a>   <a href="#">Send</a>
Voided	241-A66-02794171	TestAgent2TX46		Houston	TX	02/28/2017 15:05:02	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Void</a>   <a href="#">Send</a>
Assigned	035ECA49	TestAgent2TX46	test	Houston	TX	02/28/2017 11:44:19	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Send</a>
Assigned	CFA8F716	TestAgent2TX37	yr	Houston	TX	02/25/2017 11:11:45	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Send</a>
Assigned	2F01FD41	TestAgent2TX37	te	Houston	TX	02/25/2017 11:11:25	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Send</a>
Assigned	103-A66-02794169	TestAgent2TX39		Houston	TX	02/25/2017 10:58:30	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Void</a>   <a href="#">Send</a>
Pending OTL Review	103-A66-02794168	TestAgent2TX39		Houston	TX	02/25/2017 10:57:58	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Void</a>   <a href="#">Send</a>
Cancelled	23398096	TestAgent2TX39	Test Borrower	Houston	TX	02/25/2017 10:40:01	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Send</a>
Cancelled	E3B5AF65	TestAgent2TX39	yeree	Houston	TX	02/25/2017 10:12:25	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Send</a>
Cancelled	C67B0E97	TestAgent2TX39	yrdy	Houston	TX	02/25/2017 10:04:22	<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Send</a>

## 1.029 Sent Items

1. After you login in you will be viewing the **WFG File Mangement** home screen **[Refer to Subsection 1.028 – Figure 39 above]**
  - a. Hover over the **View** tab, select **Sent items** to display the **Sent Items** screen to preview a list of CPL and/or Policy Jacket document emails sent via the Send action from the **WFG File Services** screen, **CPL** tab **[Refer to Subsection 1.016 in Section 6]** and/or **Jackets** tab **[Refer to Subsection 1.021 in Section 7]** or from the Documents screen **[Refer to Subsection 1.028 – Figure 40 above]**

Status	Email	Date Sent
Sent	msmith@willistonfinancial.com	03/01/2017 13:55:11
Sent	msmith@willistonfinancial.com	03/01/2017 13:54:33
Sent	hscalercio@mortgageconnectip.com	03/01/2017 10:23:53
Sent	ebixler@mortgageconnectip.com	03/01/2017 10:22:52
Sent	cody@hhblaw.com	02/21/2017 09:42:04
Sent	drmatthews2@gmail.com	02/21/2017 09:37:11
Sent	mdsmith@willistonfinancial.com	12/17/2016 22:30:53
Sent	msmith@willistonfinancial.com	11/12/2016 08:51:56
Sent	msmith@willistonfinancial.com	05/11/2016 07:40:28
Sent	msmith@willistonfinancial.com	03/16/2016 14:03:05
<div> <span>◀</span> 1 of 2 <span>▶</span> ( Total rows: 13 ) </div>		

2. Navigate through the Search Documents grid values by using the pagination arrows