

FIRST NATIONAL CPL/JACKETS USER INSTRUCTIONS

1. From the Main Screen of Closers' Choice, open the File you wish to use as you normally would or create a new file and input the information you have available.

✓ Closers' Choice - Services Gateway - 21st Century Title Company

File Edit Activities Lists Reports Updates Window Help

FIRST NAT 4
Status: Open
Closing Date: 09/03/2018
Order Date: 09/04/2018
Sales Price: \$375,000.00
Loan Amount: \$122,500.00

Settlement Agent: 21st Century Title Company
Closing Preparator: Harold Jones
Closing Officer: Alexa Taylor

Property: 984 Centurion Drive, Jacksonville, Florida 32216

Sellers: 1. Dwight Venese
Buyers: 1. Carissa French

Listing Broker: HOME FINDER INC
Brenda Bardot
Phone: (904) 851-7411

Selling Broker: 21st Century Homes
John Jameson
Phone: (904) 215-6088

Lender: Big Bank Lending Inc.
Henry Hugs
Phone: (800) 999-8889

Underwriter: First National Title Insurance Company
F - Florida

2. Verify that you have the Street Address, City, State, and Zip filled out in your property screen. Note that if you enter the zip code first, the city and state will populate automatically.

✓ Property Information: FIRST NAT 2

File Edit Lists Help

Services Gateway Title Search CPL / Jackets Lien Search Survey eRecording Informant Order Express Notary Loop Payoff Tracking

Property Address:

Subdivision / Condo Index: Add

Parcel ID: 54-12-30002 Type: Residential

Street: 3108 Siempre Drive

City: Jacksonville State: Florida Zip: 32216-___

County: Duval Township:

Use Buyer Address
 Use Seller Address

Plat / Map / Subdivision / Condominium:

Lot Number(s): Block:

Name:

- Make sure all buyers/sellers have their contact information filled out (first and last name, street address, zip code, etc.)

Borrowers		Sellers	
#	Name	Joining Phrase	
1	Patricia Hensen	, an unmarried woman	

Patricia Hensen

Add Corporation / Estate Man Woman

Delete

First Name: Patricia Middle: Last Name: Hensen Suffix:

Full Name: Patricia Hensen

Joining Phrase: , an unmarried woman Federal Tax Id: - - -

Foreign Address Zip: City: State:

Street: 63410 Dogwood Drive 32257- Jacksonville Florida

Name attachment (fka, aka):

Phone Numbers: Ext: Types:

1. (904) 841-7810 1. pattyhensen@pattyhensen.net

2. 2.

3. 3.

Email Addresses:

1. pattyhensen@pattyhensen.net

2.

3.

Sign HUD:

Pronoun: she

Use Informant

User Name: Password: Auto Notices?

Back Ok Next

- Make sure your loan number is provided in the Underwriter screen, as well as your loan clause and your lender's name and address.

✓ UW and Lender Information: FIRST NAT 2

File Edit Lists Help

Services Gateway Title Search CPL / Jackets Lien Search Survey eRecording Informant Order Express Notary Loop Payoff Tracking

File:

Operator: Alexa Taylor Tracking Name:

Prepared by: Joan Taylor Settlement Officer: Harold Jones

Underwriter:

First National Title Insurance Company Florida

Lender:

Name: LENDER OF THE AMERICAS Loan Number: 551-52-390

Insured: LENDER OF THE AMERICAS Lender is Insured

Loan Clause: and/or The Secretary of Housing and Urban Development, his successors and/or assigns, as their interests may appear.

n / a FHA

Lender VA

Standard

- If your Lender has a different CPL address that they need printed on the CPL, make sure that you have entered that information in the address book under the CPL tab for your lender.

Address Book

File Lists Options Help

Quick Name:

Group Names	Members:
	Code Name
<< All >>	AMERICAS LENDER OF THE AMERICAS
<< Un-Assigned >>	BARCLAY Barclay Bank
Agents	BIGBANK Big Bank Lending Inc.
Appraisal	BOA Bank of America
COA Companies	FICUS BANK Ficus Bank
Customers	HFC Household Finance Company
Employees	JOE SMITH Joe Smith
HOA Companies	LINDA Beta Brokerage Services
Insurance Companies	MILLENNIUM Millennium Bank
Lenders	QUICKEN Quicken Loans
Mortgage Brokers	
Realtor	
Realtor Agents	

General Ship to Address Other Agents

Searcher Lender **CPL**

LENDER OF THE AMERICAS

Name:

Address:

City: State: Zip:

Default Lender Information

- Be sure to select your Underwriter on the file as well before ordering. This will make sure you are directed to First National's integration automatically. If you have just signed on with First National, please contact Closers' Choice to assist you with setting up your Underwriter information.

UW and Lender Information: FIRST NAT 2

File Edit Lists Help

Services Gateway Title Search CPL / Jackets Lien Search Survey eRecording Informant Order Express Notary Loop Payoff Tracking

File:

Operator: Tracking Name:

Prepared by: Settlement Officer:

Underwriter:

Lender:

Name: Loan Number:

Insured: Lender is Insured

Loan Clause:

n/a FHA
 Lender VA
 Standard

- Make sure the check box next to the policy is selected for the jacket(s) you need. The amount will also need to be completed, either by selecting the "Policy Same as Loan Amount/Sales Price" check box or typing in the amount in the "Policy Coverage" field.

Commitment / Policy Information: FIRST NAT 4

File Edit Lists Help

Commitment:
 Number: Issued: Type of Estate: Fee Simple
 Effective:

Loan Policy:
 Loan Amount:
 Policy Same as Loan Amount
 Policy Coverage:

Document 1 Document 2 Document 3
 Dated:
 Recorded: @
 Book: Page:

Policy
 Number:
 Issued:
 Effective: Oct 16, 2018 11:40:21 AM

Owners Policy:
 Sales Price:
 Policy Same as Sales Price
 Policy Coverage:

Document 1 Document 2 Document 3
 Dated:
 Recorded: @
 Book: Page:

Policy
 Number:
 Issued:
 Effective: Oct 16, 2018 11:40:22 AM

- Select the CPL/Jackets button from the Services Gateway toolbar at the top of the main screen of Closers' Choice.

Closers' Choice - Services Gateway - 21st Century Title Company

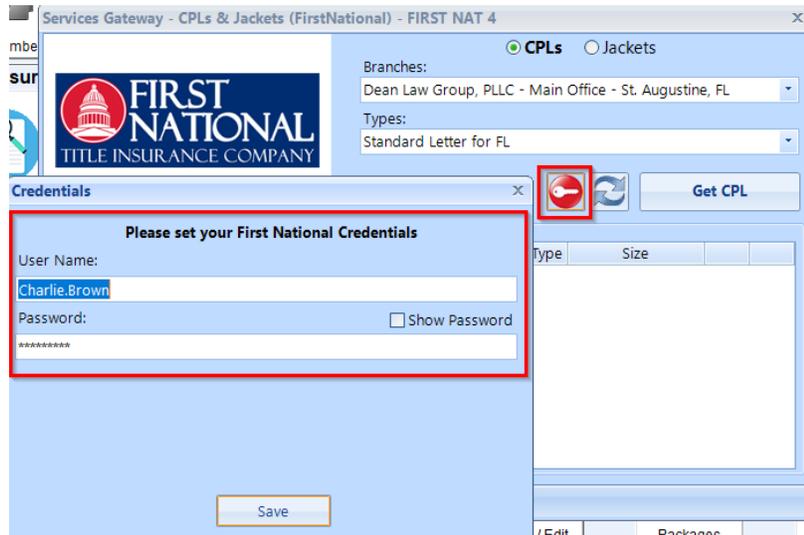
File Edit Activities Lists Reports Updates Window Help

Gateway Title Search **CPL / Jackets** Lien Search Survey eRecording Informant Order Express

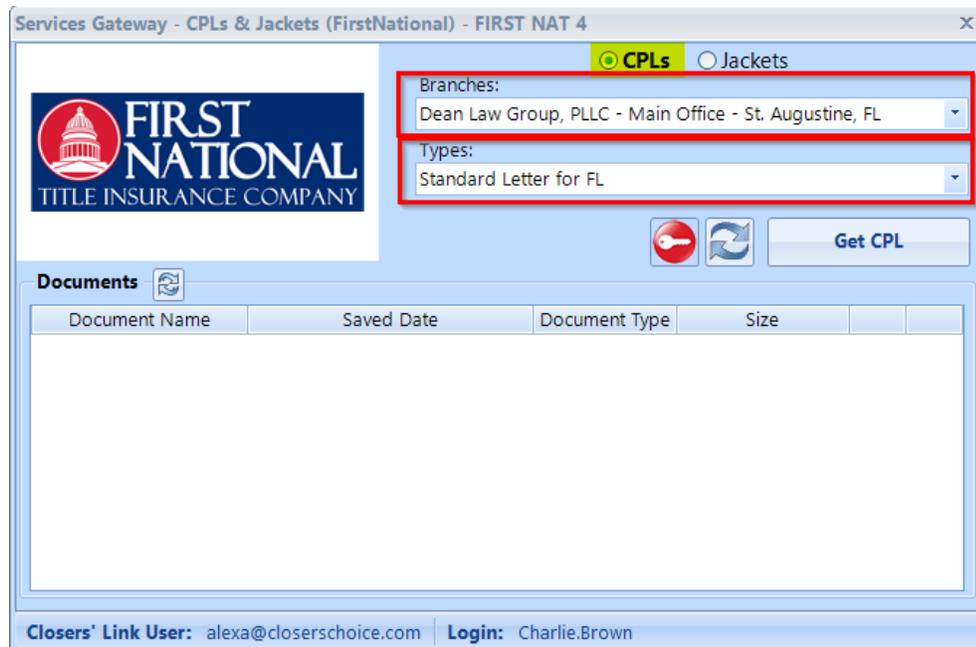
FIRST NAT 5
 Status: Open
 Closing Date: 09/03/2018
 Order Date: 09/04/2018
 Sales Price: \$375,000.00
 Loan Amount: \$122,500.00
 Settlement Agent: 21st Century Title Company
 Closing Preparator: Harold Jones
 Closing Officer: Alexa Taylor

File Number
 File Number File Finder File Transfer

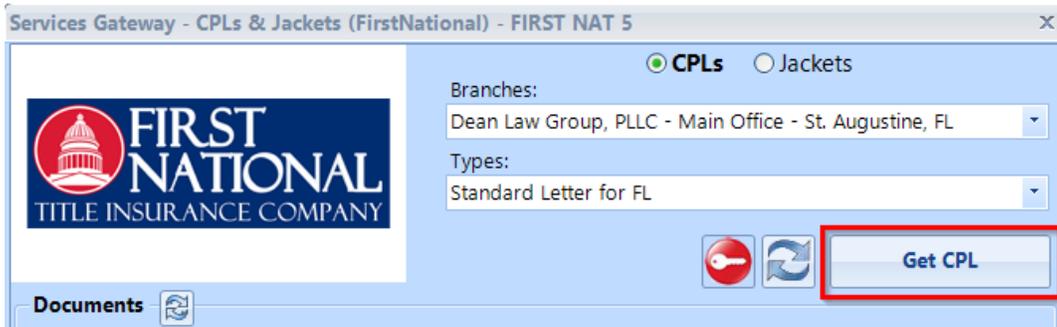
9. If this is your first time using our integration with First National, you'll need to put in your credentials. A pop-up window should automatically appear asking for your User Name and Password. If it does not, you can click on the red key button on the ordering window. These credentials are provided to you directly by First National. If you do not have credentials or do not remember your credentials, please contact First National. *If this is your first time using the integration, please make sure that you have contacted First National to activate the required permissions to use the integration. You can contact First National at fristnet@fnti.com.*



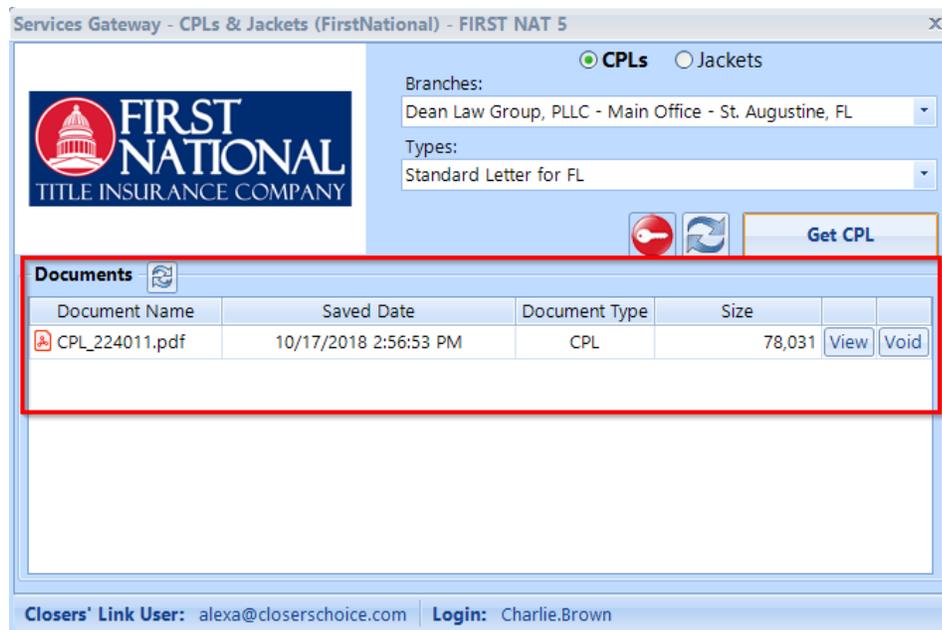
10. You are automatically defaulted to the CPLs order section. To order a CPL, verify your Branch office is correct. You can change the Branch office by selecting the drop-down menu. Then select your Closing Protection Letter Type. If you have more than one option available to you, you can change the Type by selecting the drop-down menu. The type defaults to the Standard Letter.



11. Once you are satisfied with your selections, click the “Get CPL” button.



12. Your CPL will appear in the Documents section below, along with the Document Name, Saved Date, Type, and Size.



13. You can View or Void the CPL from here as well by clicking the buttons next to the Document information.



14. To order a Jacket, select the radio button next to the CPLs button at the top of the order window.

Services Gateway - CPLs & Jackets (FirstNational) - FIRST NAT 5

CPLs **Jackets**

Branches:
Dean Law Group, PLLC - Main Office - St. Augustine, FL

Types:
FL1-ALTA Owner's Policy - Florida Modified

Get Policy Jacket

Documents

Document Name	Saved Date	Document Type	Size		
CPL_224011.pdf	10/17/2018 2:56:53 PM	CPL	78,031	View	Void

15. Verify your Branch office is correct. You can change the Branch office by selecting the drop-down menu. Then select your Jacket Type. The type defaults to the Owner's Policy, but you can change the Type by selecting the drop-down menu.

Services Gateway - CPLs & Jackets (FirstNational) - FIRST NAT 5

CPLs **Jackets**

Branches:
Dean Law Group, PLLC - Main Office - St. Augustine, FL

Types:
FL1-ALTA Owner's Policy - Florida Modified
FL2-ALTA Loan Policy - Florida Modified
FL3-ALTA Short Form Residential Loan Policy

Get Policy Jacket

Documents

Document Name	Saved Date	Document Type	Size		
CPL_224011.pdf	10/17/2018 2:56:53 PM	CPL	78,031	View	Void

16. Once you have made your selections, click the "Get Policy Jacket" button.

Services Gateway - CPLs & Jackets (FirstNational) - FIRST NAT 5

CPLs **Jackets**

Branches:
Dean Law Group, PLLC - Main Office - St. Augustine, FL

Types:
FL1-ALTA Owner's Policy - Florida Modified

Get Policy Jacket

Documents

Document Name	Saved Date	Document Type	Size		
CPL_224011.pdf	10/17/2018 2:56:53 PM	CPL	78,031	View	Void

17. Your policy jackets will appear below in the “Documents” section. You can view or void the Jacket as well by selecting the appropriate button.

Services Gateway - CPLs & Jackets (FirstNational) - FIRST NAT 5

CPLs Jackets

Branches:
Dean Law Group, PLLC - Main Office - St. Augustine, FL

Types:
FL1-ALTA Owner's Policy - Florida Modified

[Get Policy Jacket](#)

Documents

Document Name	Saved Date	Document Type	Size		
OwnersPolicy_FL1-9825519.p...	10/17/2018 3:21:17...	PolicyJacket	753,988	View	Void
CPL_224011.pdf	10/17/2018 2:56:53...	CPL	78,031	View	Void

18. If you need to order a Short Form Lender’s Policy, select it from the Type drop-down menu.

Services Gateway - CPLs & Jackets (FirstNational) - FIRST NAT 5

CPLs Jackets

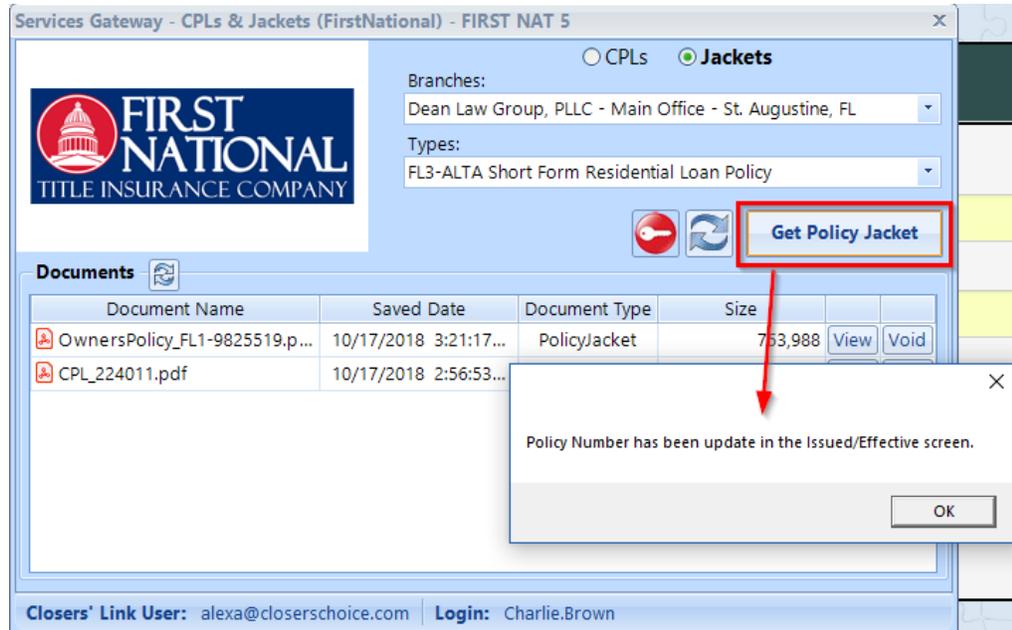
Branches:
Dean Law Group, PLLC - Main Office - St. Augustine, FL

Types:
 FL1-ALTA Owner's Policy - Florida Modified
 FL1-ALTA Owner's Policy - Florida Modified
 FL2-ALTA Loan Policy - Florida Modified
 FL3-ALTA Short Form Residential Loan Policy

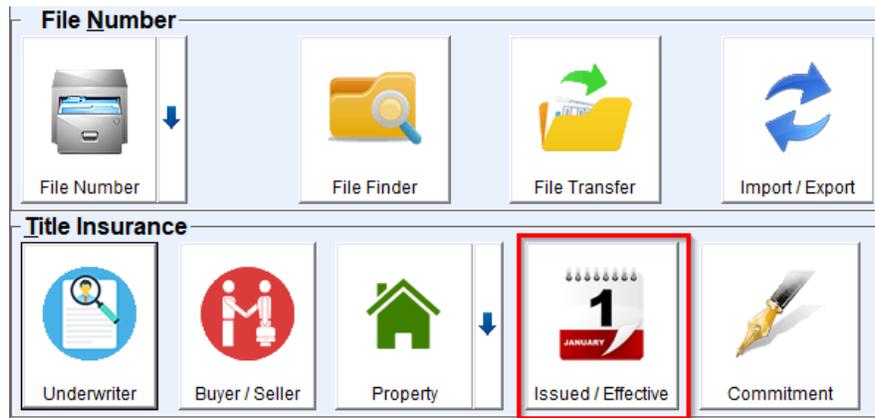
Documents

Document Name	Saved Date	Document Type	Size		
OwnersPolicy_FL1-9825519.p...	10/17/2018 3:21:17...	PolicyJacket	753,988	View	Void
CPL_224011.pdf	10/17/2018 2:56:53...	CPL	78,031	View	Void

19. Select the “Get Policy Jacket” button again. A pop-up will appear to let you know the policy jacket number has been updated in the Issued/Effective screen. The document will **NOT** appear in the Document section below. You will need to create the Policy Jacket using the templates in your Closers’ Choice document library through the Document Generator button.



20. Your policy numbers will automatically be updated in your Issued/Effective screen, so you do not need to manually type them.



The screenshot shows a software window titled 'Commitment / Policy Information: FIRST NAT 5'. The window has a menu bar with 'File', 'Edit', 'Lists', and 'Help'. Below the menu bar, there are several sections for data entry:

- Commitment:** Includes fields for 'Number', 'Issued', 'Effective', and 'Type of Estate' (set to 'Fee Simple'). There is an 'Auto-Number' button.
- Loan Policy:** Includes a checked checkbox, 'Loan Amount' (122,500.00), 'Policy Same as Loan Amount' (checked), and 'Policy Coverage' (122,500.00). There is an 'Additional Information' button.
- Document 1:** Includes a dropdown menu, 'Dated', 'Recorded', 'Book', '@', and 'Page' fields.
- Policy Information:** A red box highlights the 'Policy' section, which includes 'Number: FL3-9825517', 'Issued', and 'Effective' fields.
- Owners Policy:** Includes a checked checkbox, 'Sales Price' (375,000.00), 'Policy Same as Sales Price' (checked), and 'Policy Coverage' (375,000.00). There is an 'Additional Information' button.
- Document 1:** Similar to the Loan Policy section, it includes a dropdown menu, 'Dated', 'Recorded', 'Book', '@', and 'Page' fields.
- Policy Information:** A red box highlights the 'Policy' section, which includes 'Number: FL1-9825518', 'Issued', and 'Effective' fields.

21. The Closing Protection Letters and any Policy Jackets will automatically appear in your Documents section of Closers' Choice for you. Once you create the Short Form Policy Jacket using the template in Closers' Choice, the policy number should automatically pull onto it.