

# TrackerPro

## **Security Title of Baltimore Integration**

## **User Guide**

Revised: 8/26/2019

### Starting with the integration

Before you begin using the Security Title Integration your organization must be enabled by TrackerPro and by Security Title. To accomplish this please contact TrackerPro support at 631-393-6999 and request that they enable your Security Title Integration. TrackerPro staff will work directly with Security Title to enable the integration.

#### A note on E-Mail Address:

When you use the integration, you will be identifying yourself using an email address. This will not be an issue if your email address listed in TrackerPro is included in the list of employees that Security Title has on file for your agency. The list of employees that Security Title has can be adjusted by your Security Title Designated Admin User signing into Security's Website and going to the 'Manage My Account' option on the left side. The relevant section of Security Title's User Manual is included at the end of this document.

If your email address is not approved by Security Title authorization will be denied and you will be given the opportunity to enter a different email address.

#### A note on Terms of Service:

The very first time you try to create either a CPL or EJacket you will be forced to accept Security Title's Terms of Services.



### **EJackets**

- Click the Create EJacket button from within the Title Policy Documents window of TrackerPro. The Security Title Underwriter EJacket Form will open.
- 2) This screen allows the user to see the information that will be sent to Security Title. TrackerPro will auto-populate all fields necessary to create the EJacket. The user may override many of the settings. For example, in the event a Short Form Loan Policy will be issued, the user may select the Short Form Loan Policy from the Prefix dropdown.

Click the Download Now button. The EJacket will be generated, downloaded and saved in the TrackerPro File Cabinet for the current application. The EJacket will also be added to the Title Policy Sections window so that they can be included when full Title Policy is created and, the Policy Number will automatically merge into all policy and endorsement documents.

Title Policies			
Select Policies to C	Policy Policy	Sections:	
Security Title Guarantee	Corporation of Baltimore		
Title Policies:	•		
Loan Mortgage \$5,0	00,000.00		
Policy Details:			
Policy Number:	Issued Date: End. Issued: Policy Date:		
Typed by:	Typed Date:		
Create Policy Create	All Policies Update Policy Update All Policies Create	<u>S</u> etup	
Create EJacket	Policy PDF Recording Endorsement Policy PDF	Egit	
			F
p 🖳 SecurityEJacket			×
ti Elackat Form Sa	curity Titla	Il an Caile	a
LJacketronn - Se		User Guide	
t:			
Title Number	Email Address		
ISS-1578	breisner@trackerprollc.com	Edit	
an Agent	Test Agent Ben NY (25525-100 East Broadway New York, NY 66633)	✓ Default	
Property Address Line 1	123 test street	County Nassau	~ 4
s Property City	Massapequa State	NY Zip 11590	C
Property Type	Residential, owner-occupied		~
Buyer/Borrowers	Oswald Owner Individ	ual Ad	-
•s			
		Remo	ove
	Name Oswald Owner Individual	~	_
Closing Date	8/31/2019 👻 Liability Amount \$450,000.00 Loan Numb	er 123456	
Policy Type	Mortgage		$\sim$
Transaction Type	Refinance (2)		$\sim$
Prefix	Loan Policy of Title Insurance (06/17/06) (48)		~ F
Signatory	None		~
Endorsements	Residential Mortgage Endorsement TIRSA Residential Mo	ortgage (Code 436)	
	Waiver of Arbitration Endorsement Loan TIRSA Waiver Of Arb	itration (Code 430)	
	Environmental Protection Lien Endorsement TIRSA 8.1 EPL - New	VYork (Code 429)	
	Endorsement TIDEA D. H. K. M. L. K. L. (20) (100)		
	TIRSA Residential Mortgage (Lode 436) (189)		Ť
Lender	Citi Mortgage, Inc.		E
			E
Cancel		Download Now	

Note: The user can type anything into these fields however our suggestion is to always enter the correct information into the proper area of TrackerPro before opening the EJacket window so that all correct values will be displayed. If the user adjusts something in the EJacket window, it will not change the values in any other areas of TrackerPro. It will only be used for the current EJacket order.

### CPLs

- Open the Edit Transactions window, select the Loan Policy for which the CPL will be issued and click the CPL button. This button may be labelled Agent Letter or something similar depending on the state. As a reminder, CPLs are generated on Loan Policies only.
- 2) Make sure to select the Recipient, Approved Attorney, Closers, and any other information that is required for the letter. The lists of Closers and Approved Attorneys can be manipulated by logging onto Security Title's website. TrackerPro will auto-populate all other fields necessary to create the CPL.



Note: We will attempt to select the Lender and the Lender's Address from Security Title's list of Lenders automatically. We do this by searching the list of Lenders that Security Title provides for whatever was entered into TrackerPro.

In a best case scenario we will match exactly one Lender entry and one Lender Address entry automatically, in which case they will be chosen automatically.

We may potentially match multiple Lenders, or be unable to match the address exactly, in which case you can choose from the list of matching Lenders and Addresses.

You can also choose to Request a New Lender and/or Lender Address. If it's a new Lender than Security Title will need to approve this request in the same manner they do an Over Limit Approval for the EJacket.

Note: The user can type anything into these fields. However, our suggestion is to always enter the correct information into the proper area of TrackerPro before opening the CPL window. If the user adjusts something in the CPL window, it will not change the value in any other area of TrackerPro. It will be used for the current CPL order only.

LenderSearch	Citi Mortgage, Inc.	Search
Lender	Citi Mortgage, Inc. (LR00941)	~
Lender Address	1351 State Rt. 55, Lagrangeville NY, 12540	~

Lender Please Choose  Lender Address Please Choose a Lender first	Lender Search	Citi Mortgage	Search	
Lender Address Please Choose a Lender first ~	Lender	Please Choose		$\sim$
	Lender Address	Please Choose a Lender first		$\sim$

	Massive Mortgage, Inc.			Search	
	Request a New Lender				
	Request a New Lender Address				
NewLenderName	Massive Mortgage, Inc.				
New Lender Address	1351 State Rt. 55				
New Lender Address 2					
New Lender City	Lagrangeville	State	NY	Zip 12540	



## **Over Limit Approval / Request for New Lender**

While doing either an EJacket or a CPL it is possible that the transaction may exceed your contractual policy limit with Security Title. Each Title Agency has a limit on the policy amount that Security Title will approve automatically. If the transaction exceeds this amount on either a CPL or an EJacket then you can still complete your transaction through the integration, however there will be a couple of extra steps involved.

- When you click Download Now on either the EJacket or CPL you be prompted that this file exceeded your contract authority, and that we will be opening the Security Title Website for you to complete your request.
- You will be given a form to complete requesting more information. Please fill out this form and click Submit Request.
- Security Title will receive and review your request. This is done by a Security Title Representative, not by an automated process, so please be aware that it may take them some time to review. You can contact your Security Title Representative regarding this request.
- When Security Title either Approves or denies your request then you will receive an E-Mail immediately with their response. This response will be downloaded into your copy of TrackerPro within 10 minutes. If the response is successful you will see the EJacket or

CPL in your file cabinet, along with the Policy Number in the Policy Document screen. If this request is denied, you will be able to resubmit the request as needed.

If you don't receive the download into TrackerPro within 10 minutes than it is possible your server has an issue. Our support staff will be notified automatically, but if you need the document right away for a closing you can use the attachment on the E-Mail that you received.

In the case of a Request for a New Lender a similar process will be followed, except step # 2 (The form on Security's Website) does not apply.

nis ow Ibr	file exce open th mit the re	eded your co ne Request A equest.	ontract authority with pproval form on their	i Secu r web	urity Title. We will site for you to	
					UK	
	ePhoenix (C	AIQC)				
	Request #: Date: Agency: Fax No.: File Number:	New 08/26/2019 TANY0010 - Test Agent B ISS-1578	en NY			
	(1)	Proposed Amounts:	Loan: 545,000,000.00			
	(2)	Describe Improvements: *	Bayer Bonowa, Oswan Omer			
	(3)	Property Address: City/State: County: Type of Property: Type of Transaction: Mechanic's Lien: *	123 test street Meisspecue. NY 11590 Nassau Residential, owner-occupied Purchase Mechanici: Lien coverage required by:	Camer	D Lender E N/A	4
			If Mechanic's Lien coverage required, crinstruction is: "	II New	Under way E Proposed	
	(5)	Access: *	Does land abut an open and dedicated road? If no, was title to easement affording access	III Yes	E No	
	(6)	Survey: *	Survey Coverage required by If coverage required, was survey obtained? If survey obtained, please provide date	Owner  Ves	E Lender NIA	
	(7)	Period of Search: *	From To.			
	(8)	Starter: *	Describe previous policy (or file)			1
	(9)	Special Title Risks or Cou	erage Goditional Information: *			
	(10)	* 🔲 The undersigned cet	the above information to be an accurate sta	tement of th	e status of Itie and recommends lissuance	of the

## **Security Title Account Management**

One individual within each agency is designated as the Admin User. That individual can add or remove personnel and allow or disable access to the agency's records

#### **Adding Personnel:** 1.

To add personnel, click on Manage My Account in the left hand navigation bar:

Click on "Add Personnel" found in the right hand corner of the screen:

the preferred method of contact and enter their email

address:

Fir feit You Louist. Bal	1. 10.7										
the Maggaradites + (2) taut	coval (2) CA	rivins Ci Vourne Io.								1.00	A * 10 = 11 ₩ * Fage* Saldy* Fods* @*
ePhoenix (CAI QC)	Considered	tielp								a second	
SERVICES	0	ffice Location:	Taxib0001 - Trizing ag	ena d'Alaviant 🖂	1						
ty Assount	- 92	ar Hitolity Road Inf	sensition will copire in	35 days (06711)	814.7	<u>}.</u>		did beren to beren			
Ply Daehtround	14	the second real of the	and 11 hourse	nacor, moreare	10.0	ADVC POSS	di weh v	and recroe merma	con ca	torea.	
Nonge He Annual	304	Contraction of the second	· · · · · · · · · · ·	le caused i nes	ver.	A a low is	uspay	un rin Dealis			
lles		- sparse rains				1022220	_	-		1	
County Class		Fk Opened	File Status	File Nomber	27	Dett		(Report State)		LescModified	
Open hew his		AM	Penting Islames	07-18-16 1		100819	Sec.54	Campeny	1.00	AN	
CPL	_	03/27/16 00.43 AM	Pending Policies	I#sl03272016		03/27/16	91668	eReported to Concern	ND	C0/00/16 11.52	
clusing Metodian cottons		09/30/16 11.53	Pending Report	MRM ILST	Π	10405/10			1 NU	10/10/16 02:51	
Ferns		1005/16 83:27	Pending Report	MRM TEST	W	1005/16			ND	10/24/16 02:30	
Download vorms		0100/1/ 11:50	In Process	Les: date file		11/20/14		i	INU	01/03/17 04:30	
Receipt Letters		Mai		[1546	-	_			-	<u></u>	
Plant											
anawh											
Starter Letter Gaguesta											
Quote											
Gimmate Mate Doube											
Other Services											
Manual											

Oristics B Massality								5
N I BAD I								
TAME20001 - Teeling Agen	ey of Maryland					_	-	
					(	Add Personal	al à	
12		2	1	1 kostern	1	-		
Kerne (Last, Tiret ML	Trinsleel Compol	System Role	Userian No.	Lagination	Appolyment	Cancelled		
Doggs, Lasilo	No	Agent Usor						
Brown, Kathoo	No	AgentUser				_		
BeGnay Marine R	No	Agent User		1				
Regers, Brian N	No	Aport User		1				
Fingers, Tret C	Yes 410-727-4458	April Admin	RPH3579	12+31/2018	01092014			
Jayan, Oast	No	Aspent Cherry						
	Oncode Mexania, -          in Reip           Intern plant in Reip           TAME00001 - Tasting Agan         Morea (Last Chan Mi         Doggs, (Lettle         Desen, Flant Chan         Desen, Flant Chan         Desen, Flant Chan         Desen, Flant Chan         Desen, Flant         Desen         Desen, Flant         Desen, Flant	Control Results,      Control Results,	Reference Neurona, e - 4 Meni Electronica de la construcción de la co	All	Manus Manus, I 4 No. 1 No. 1	Minus Munuk, 4 mol - Marco	I de la Carla de l	Water Market



Check the applicable boxes if the person is to be a policy signatory, escrow signatory, etc. In some cases, these statuses require our approval though the individual may access eSecurityConnect immediately. Click on "submit" when you have finished entering all necessary information.



#### 2. <u>Removing Personnel:</u>

To remove personnel, click on Manage My Account in the left hand navigation bar

New Security To-	8 14Y							
wetter direct	totnell 2" Lonic US, noted	unt. •						🐴 + 👸 + Li 🐳 + Lage - Laboy - Loob + 🔒 +
(GALOC) here	n i Mart						and the second se	
6907	LEMINIST LARGE ANN	basheeli haven						
of the state		1					And Description	
and the second se	Transformer and the second	Contract on the local division of	increase of the	1 Common State	1 Janu	Parameter and	Incompany of the local division of the local	
1995	New June, Territe	Prepai Cread	Scarara Epite	Litzanie Ka	Entertion		Canceled	
IV with famous	Berge Lette	1 hy	Agere Uni					
	Shown, Kothoo	tio	Agent User					
	McGiss, Marcoo R.	tio	Agent User					
	Rogers, Brian N.	liu	Agent Une	· · · · ·				
	Rogers, Ted G.	Yes 415 727 4455	Agent.7xkinin	RPI13579	12012017			
	Smith Joe	tio	Agent User					
	Tueke Geral	114	Parri Ver			10		
							·	
p1.31.778.44012506	ng we ave - ar - <u>The Samely</u>	Tille Gan anlan Guravati	on at Kaltenans (Tr	TAIL TICTAL	tilts 1.00000		ngent Xeree	
P.J. TR HATSTON	geraus av Delende	Title Gasarden Corneli	on at Balteries ofr	TALL   LITTL	tils texts	19 79, 1949 -		
a, a, the second cost	ny ev door de la Sanche.	The Deventue Connect	on at Balteries of	nan (Jerra)	tils see	n 70 - 1940 -	get from	
P.J., The second con-	oy ev nov no - Salánsch,	Tele Succedes Corneal	en at Balterary (Tr	nas) Terrej	tils teen	n /in rayan -	941 Krise	
р. т. непасти	oy et ave av - Intiancia	The Secondary Control	on at Laberson v Tr	tan Tura	tide texts	n Tin Tapat -	la manda da seconda da	
P.J. TR MOSTON	n, ware av - Diference	Tele Caracter Control	an at Backenarus (fr	nars) Terreja	tiks tewe	es files ringues -	nget Aven	

Click on the row containing the name of the person to be removed:

Phoenix (CAI QC) Serv	icus il Help i								
NUMBER S	Differ Location: MADA * Your Public Black - Formation Sort By Cartingford	in - "wing rights in will og et in 17 o will Dig et in 17 o	dragent of Key (19/11/2) Geod Files (1	ers. Nick a row in	- dingriny	the I de Detaile		NUM FRS	
Design The Associal	Cristely The Bank								
HS Sectories Sectories	The Decivity of Children of Ch	ng Policius - Mi Bio Ing Heppert - Mi	Rid Texi Fild Texi (15-15-1	10.29.15 v 3535-16	1.00000 99295	eligen kent vfilguræl tu Compens	10 00 10 00	100 Victoria Kabina 11,62 Atti Victoria 12,22	
729 Datisz Porteckos Letter	FN 04/25/17 03:48 Perci 190	ing Policies 17	-05-15	842817	109373	effiquented to Comparts	10 54	198 429-17 02:01 148	
Forme Inder Autor Sawaka A Baser Dana M Janas	CIG2715 01 40 Perce 200 2002715 01 40 Perce 200 2002715 11520 Perce	ing Policius Inc Ing Report. M	-22 -22 -23.272316 RM 1007	0327/16 9339340	51995	effaported to Comporte	NO DE NO DE	Pui Pui IDeV7 V2.41 Pui V0eV7 02:00	
son socia decocurtor.torganti		1.							
NEWSKA ANN SECT									
ner lenkes 1914: annakens kei Jenstallens 1946 (d. 1947)									
na innation anna lantoina									

-

Use the calendar icon or manually enter into the "Cancelled Date" field the date access to eSecurityConnect by the person should be removed. Click on "Submit:"

File Mer Services Tools Hey Starsburg Starsburg Classical Starsburg Starsburg Starsburg Starsburg Starsburg Starsburg Starsburg Starsburg Starsburg Starsburg Starsburg Starsburg Starsburg Starsburg Starsburg Starsburg Starsburg Starsburg Starsburg Stars		R + R + H + Har Mar Law Br
Phonoly (CdT OC) America ( Mar)		
encorrol Certails, Incolas Annas TANUESS, Textus Annas	of Namiand	
Name: First: Nt. Last: 5	iliz. System Role: Agent User Access to Agency Services: 2	
DReal Adations: Joins Ages of Reyard Constant	Uver Name	
Sale Werk Social In-	Confirm Fasaword	
	Pretented Method & Condec (From V)	
A		
Note: When the selecting lines in red, Company reported astron Econor Information will be required. Prices Signatury	Advance (M. Z. Advance) & Schutz Columbities Advance & Galaxies & Galaxies & Columbities &	
Closer M	1 and (+12 - (599 - (3949	
Status: Approval Required	Email: [and #colognics.com	
	Careceled Date:	
	Towner No.         Bit Avenue and and a second and	
tana al'94,2,° america 14,4,4, and 10, <u>the instruction</u>	Generating Contention of Justices 1 37 39 39 30 30 30 30 30 30 30 30 40 40 3 38 38 36 30 4 3 3 4 3 4 5 4 7 10 3 10 Toology 66 40797	

The individual will be removed from the list of persons authorized to access your account:

Mr. Mana Decadary Tool:	And the second s	CEPC SHITS PRO				018708	Grandenser .	×				43.351
Superstreet a forth	wal @ kask 05 return	mt							9-1	9 - 3 8 - hy-	Mey* Tax	- 8-
telix (CALOC) weren	( sudge )											
AGENCY T	ANDOLOT - Testing Agen	cy of Marsland					Sec. 1					
in Dervera							Aul Deserve					
Terrer of the second seco	Tor Carlos and the second		and an other states			10000-0000	Street and					
Concernent and	Tieses Lesie	Da	Snert Liner		C. C.	and the second second	Station 10					
Twatte Atta V	Deres Kathon	De	Apost Liter	_	-							
	M.Cow Marine R	Lbiz.	Apent User				20 V.					
	Brown Bran N	The	RoomLiver		<u> </u>							
	Ropers, Ted C	Yes 410 727 4456	AportAciela	RF113579		01/15/2014	25 275					
	Tentor, Carol	[No	Agent User									
an gaga na ka as soor	n waar an <u>Da Jaarre T</u>	ile Section Concesso	en al Balances e Sco	ace Tarraud	tim seco	ani 140 Majari - A	est. Addres					
ar (3 (3), 15 km ar stary	e trodat date <u>The Security T</u>	ik Asaris Loreno	en af Enformene «Sen	ne Irra d	tim teest	an ta Myan-A	withday					
an Children an an san an a	e voer ster De Jaarde I	tila Saasittaa Sossanita	en al Robertson ( Sco	age Tarrand	ting tweeto	un fac Higen - A	parates					
er grug, fa we fra wee	n Yosh - Min Tao Sangha T	ik Asaris Astron	nut Sekonen (Sna	ace Tarrand	<u>Eine</u> turesta	an) fan Hogans-A	WARN -					