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.

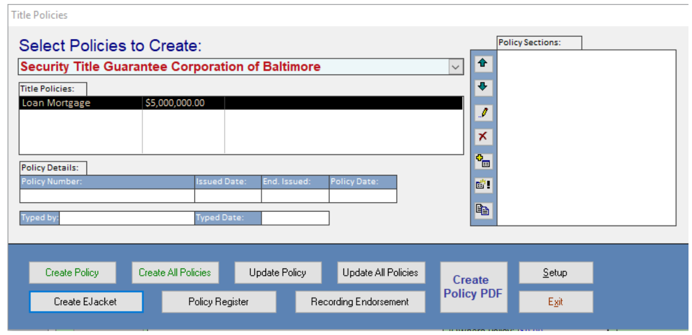
If your email address is not approved by Security Title authorization will be denied and you will be given the opportunity to enter a different email address.

A note on Terms of Service:

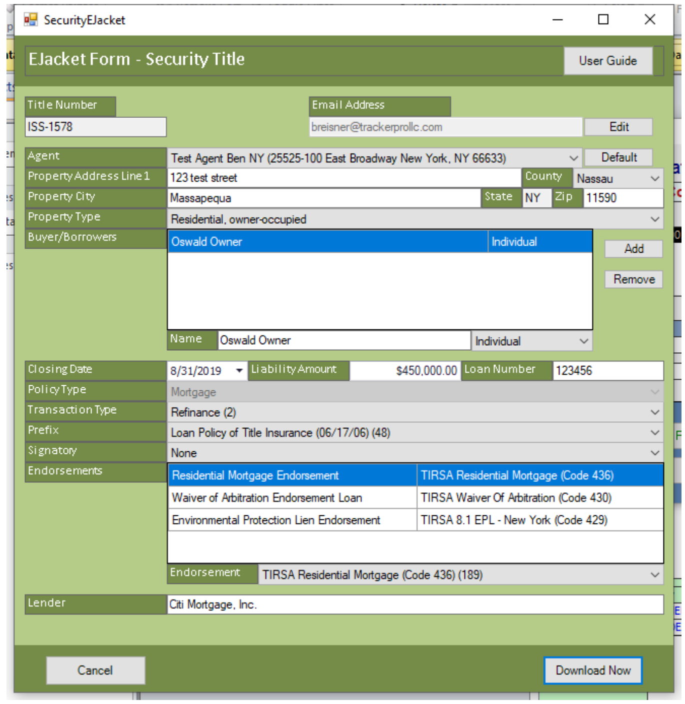
The very first time you try to create either a CPL or EJacket you will be forced to accept Security Title's Terms of Services.

EJackets

1) 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 drop-down.

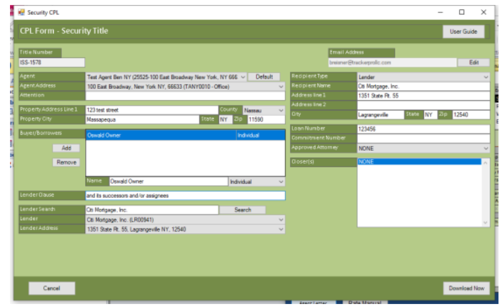


Click the Download Now button. The EJacket will be generated, downloaded and saved in the TrackerPro File Cabinet for the current application. The EJacket will also be added to the Title Policy Sections window so that they can be included when full Title Policy is created and, the Policy Number will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

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

1) 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.

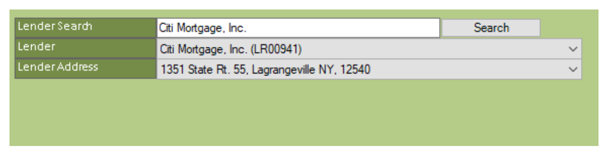


2) Make sure to select the Recipient, Approved Attorney, Closers, and any other information that is required for the letter. The lists of Closers and Approved Attorneys can be manipulated by logging onto Security Title's website. TrackerPro will auto-populate all other fields necessary to create the CPL.

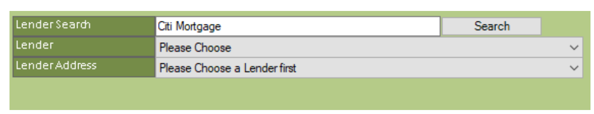
3) Click the Download Now button. The CPL will be generated, downloaded and saved in the TrackerPro File Cabinet for the current application. The user may send the letter out as needed using any of the standard TrackerPro methods.

   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.

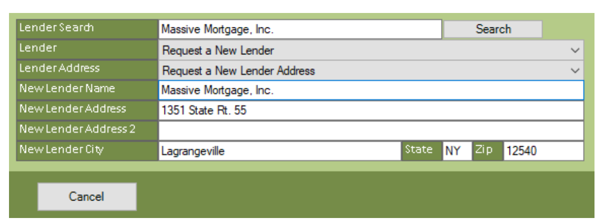
   In a best case scenario we will match exactly one Lender entry and one Lender Address entry automatically, in which case they will be chosen automatically.



   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.

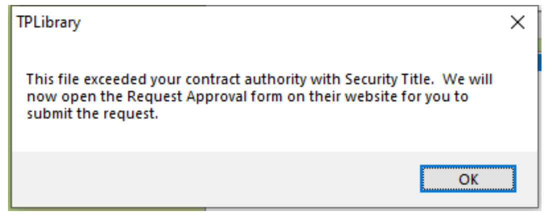


   Note: The user can type anything into these fields. However, our suggestion is to always enter the correct information into the proper area of TrackerPro before opening the CPL window. **If the user adjusts something in the CPL window, it will not change the value in any other area of TrackerPro. It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

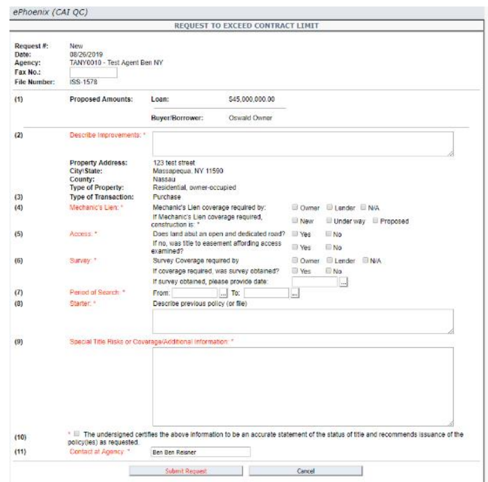
Over Limit Approval / Request for New Lender

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.

1) 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.



2) You will be given a form to complete requesting more information. Please fill out this form and click Submit Request.


ePhoenix (CAI QC)

REQUEST TO EXCEED CONTRACT LIMIT

Request #: New
Date: 08/26/2019
Agency: TANY0010 - Test Agent Ben NY
Fax No.:
File Number: ISS-1578

(1) Proposed Amounts: Loan: $45,000,000.00
Buyer/Borrower: Oswald Owner

(2) Describe Improvements: *
Property Address: 123 test street
City\State: Massapequa, NY 11590
County: Nassau
Type of Property: Residential, owner-occupied

(3) Type of Transaction: Purchase

(4) Mechanic's Lien: * Mechanic's Lien coverage required by: Owner Lender N/A
If Mechanic's Lien coverage required, construction is: * New Under way Proposed

(5) Access: * Does land abut an open and dedicated road? Yes No
If no, was title to easement affording access examined? Yes No

(6) Survey: * Survey Coverage required by Owner Lender N/A
If coverage required, was survey obtained? Yes No
If survey obtained, please provide date:

(7) Period of Search: * From: To:

(8) Starter: * Describe previous policy (or file)

(9) Special Title Risks or Coverage/Additional Information: *

(10) * The undersigned certifies the above information to be an accurate statement of the status of title and recommends issuance of the policy(ies) as requested.

(11) Contact at Agency: * Ben Ben Reisner

Submit Request Cancel

3) 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.

4) 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.

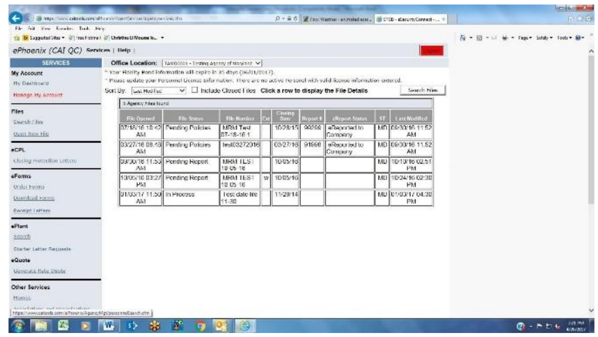
In the case of a Request for a New Lender a similar process will be followed, except step # 2 (The form on Security's Website) does not apply.

Security Title Account Management

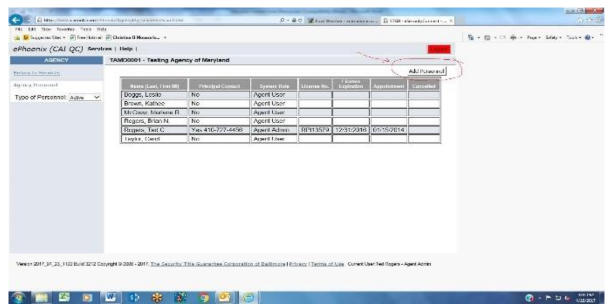
One individual within each agency is designated as the Admin User. That individual can add or remove personnel and allow or disable access to the agency's records

1. Adding Personnel:

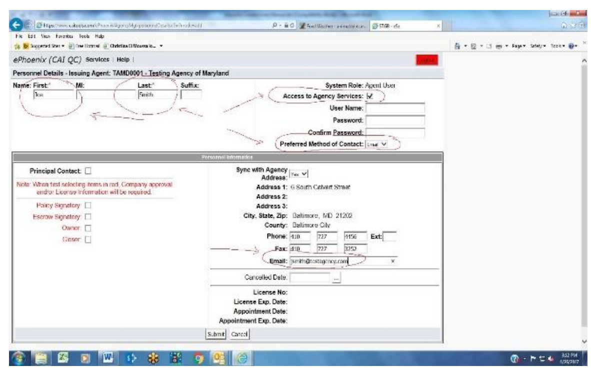
To add personnel, click on Manage My Account in the left hand navigation bar:



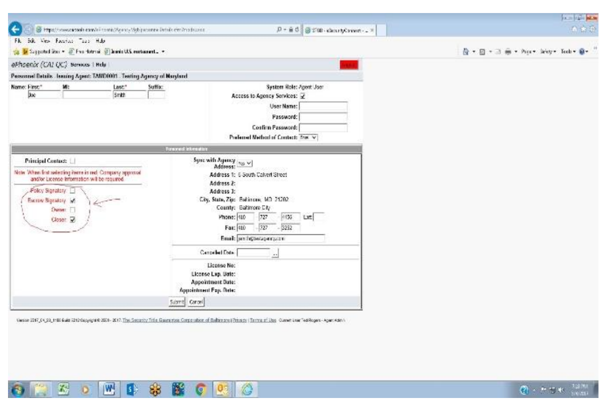
Click on "Add Personnel" found in the right hand corner of the screen:



Enter at least the first and last name of the individual, check the box after "**Access to Agency Services,**" select "**email**" as the preferred method of contact and enter their email address:

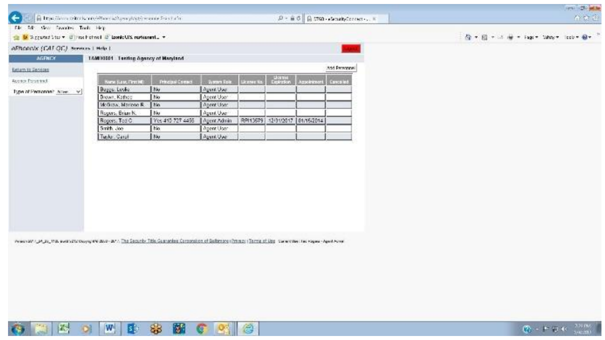


Check the applicable boxes if the person is to be a policy signatory, escrow signatory, etc. In some cases, these statuses require our approval though the individual may access eSecurityConnect immediately. Click on "**submit**" when you have finished entering all necessary information.

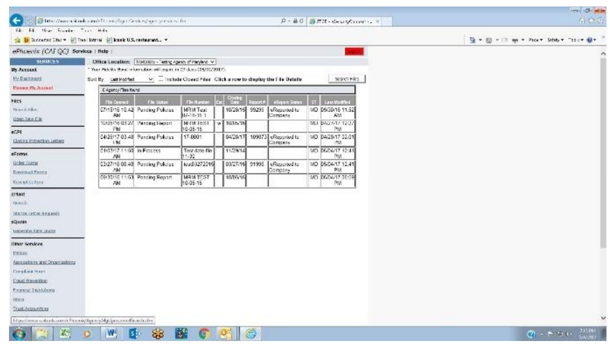


2. Removing Personnel:

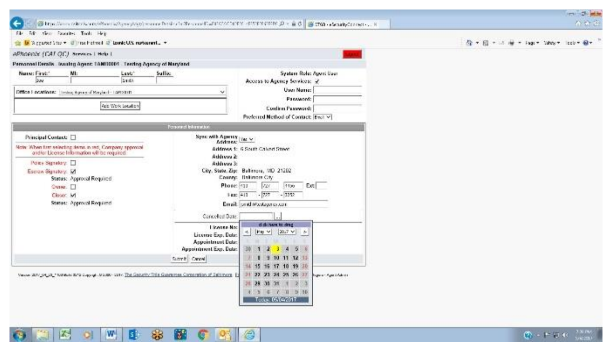
To remove personnel, click on Manage My Account in the left hand navigation bar



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



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:”



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