

You can quickly identify the Approved Attorney Contact compliant status when viewing the Contact grid (i.e., not compliant or renewal pending).

› Contact **Type** field provides the status of the Approved Attorney Contact by displaying,

» APPROVED ATTORNEY

Type	Name	Code
★ APPROVED ATTORNEY Buyer/Borrower	The Law Firm	AT B L

» ***AA NOT COMPLIANT***

Type	Name	Code
★ ***AA NOT COMPLIANT*** Buyer/Borrower	The Law Firm	AT B

» ***AA RENEWAL PENDING***

Type	Name	Code
★ ***AA RENEWAL PENDING*** Buyer/Borrower	The Law Firm	AT B

› License # field displays,

» APPROVED ATTY

Attorney Order Status: In Buyer:

Attorney

Lookup code: Save And Add New

Name: Include on revenue report

Short name: Marketing source

Payee name: Marketing rep.:

Address: Marketing rep. 2:

City/State/Zip: Foreign Marketing rep. 3:

County: Reference #:

Phone: Fax: Tax ID/SSN:

Email address: License #:

Fee transfer ledger:

Anticipate funds as:

Anticipate disbursement as: Disburse each charge separately

Represents:

Divert fees to:

Approved Attorneys

Approved Attorney Compliant

E and O Expiration Date:

» AA PENDING

- if the E and O Expiration Date is ≤ 15 consecutive days from today's date (aka system date)
- Fee transfer ledger field displays *****AA RENEWAL PENDING*****

County: Tax ID/SSN:

Phone: (999)999-9999 Fax: (999)999-9999 License #: AA PENDING

Email address: bstinson@mylawfirm.com

Fee transfer ledger: ***AA RENEWAL PENDING***

Approved Attorneys

Approved Attorney Compliant

E and O Expiration Date: 11/08/2020

E and O Carrier Name: ProAssurance

CLUP No.: 123456

E and O Renewal Date: 11/08/2020

Search Results

Current Profile: XTraining-CTI/CLT GA Agency

11:39 AM 10/9/2020

» AA CANCELLED

- if the E and O Expiration Date is ≤ 7 consecutive days from today's date (aka system date)
- unchecks the **Approved Attorney Compliant** check box which in turn displays *****AA NOT COMPLIANT***** in the Fee transfer ledger field

County: Tax ID/SSN:

Phone: (999)999-9999 Fax: (999)999-9999 License #: AA CANCELLED

Email address: bstinson@mylawfirm.com

Fee transfer ledger: ***AA NOT COMPLIANT***

Approved Attorneys

Approved Attorney Compliant

E and O Expiration Date: 10/09/2020

E and O Carrier Name: ProAssurance

CLUP No.: 123456

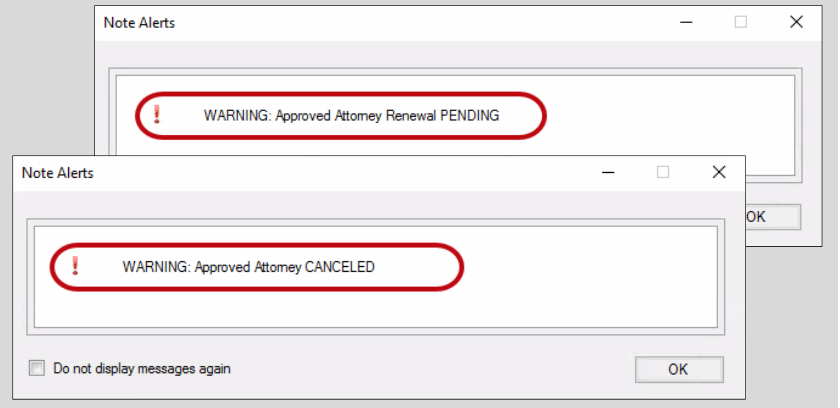
E and O Renewal Date: 10/09/2020

Search Results

Current Profile: XTraining-CTI/CLT GA Agency

11:39 AM 10/9/2020

NOTE: If the Approved Attorney status is *****AA PENDING***** or *****AA CANCELLED***** when exiting the order, the next time the order is opened, a **Note Alerts** message is shown identifying the status. This critical alert displays each time the order is opened until the Attorney Contact information is updated.



Adding a New Approved Attorney

On the **Attorney** screen, enter the,

1. **Lookup Code** = **NEWAA**; this is not case sensitive
2. **Name** = insured company name or individual name
3. **Payee Name** = the insured company name or individual name if the check is payable to other than the **Name** entered above
4. **Address, City/State/Zip**
5. **Phone**
6. **Email address**

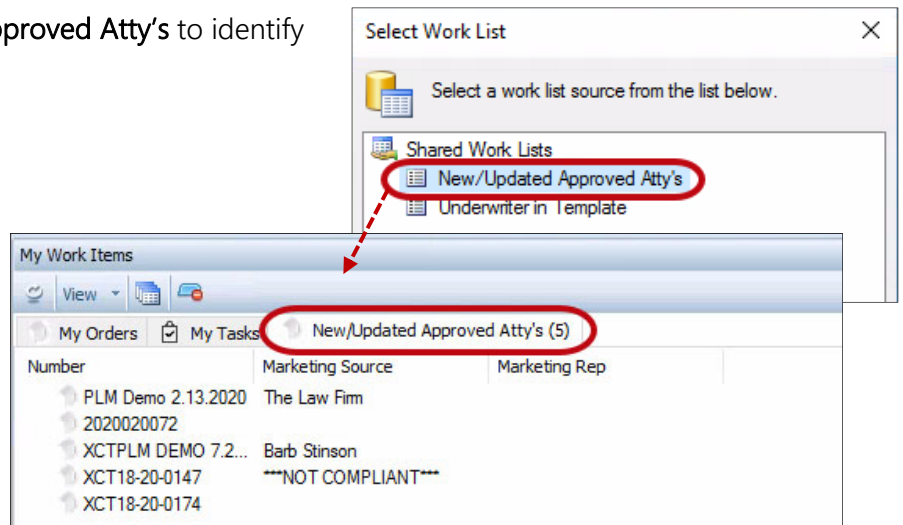
Fee transfer ledger field shows the name entered above (step 2) as black text and allows the formula behind the **Fee transfer ledger** field to populate the Approved Attorney status.

REMEMBER: When updating an existing Contact, enter **UPD** in the **Lookup code** field once the Contact is pulled from the Lookup table. Continue on to make the needed changes.

Maintaining the Lookup Table (for Power Users)

IMPORTANT: FNFi does **not** maintain the Attorney Lookup Table.

Use the **Shared Work Lists > New/Updated Approved Atty's** to identify new or updated attorney contacts.



New contacts contain the **Lookup code = NEWAA** (not case sensitive) with updated contacts containing **Lookup code = UPD** (not case sensitive). Follow your current FNF contact updating procedure and be sure to change the **Lookup code** using the FNF naming convention.

