

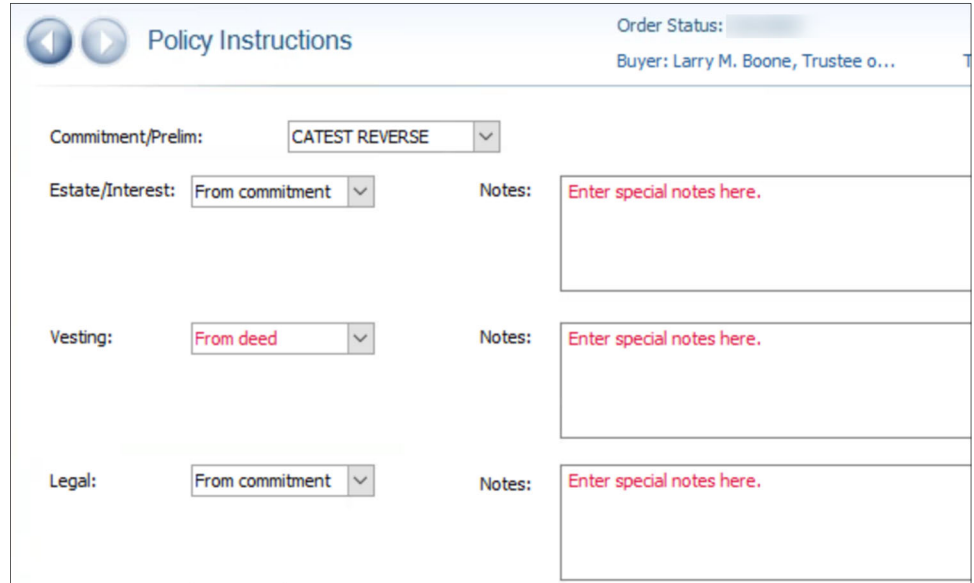
## Preparing Policies with Instructions

Follow these steps to prepare the policy instructions and policies.

### Preparing Policy Instructions

NOTE: If needed, use the commitment as a reference when completing the policy instructions.

1. Navigate to the **Policy Instructions** screen
2. If necessary, from the **Estate/Interest** drop-down, change the default; in the **Notes** field, enter any special instructions
3. From the **Vesting** drop-down, select the appropriate option; in the **Notes** field, enter any special instructions
4. If necessary, from the **Legal** drop-down, change the default; in the **Notes** field, enter any special instructions



5. Click the **Disposition Code** drop-down arrow to select a disposition for each exception/requirement

HINT: You can enter the first letter of the disposition and the drop-down auto-populates with the first option that begins with that letter.

Requirements/Exceptions:					
Type	Number	Code	Description		
Exception	1.	r4	In order to complete this rep...	PAO	Prior Approval Obtained
Exception	2.	T1	Property taxes, which are a ...	PIE	Paid in Escrow
Exception	3.	d1	A deed of trust to secure an...	POC	Paid Outside of Closing
Exception		d1a	The Deed of Trust set forth ...	RAC	Received at Closing
Exception	4.	C1	Covenants, conditions and r...	RQM	Requirement Met
				RTC	Release to Come
				SAD	Survey, Add
				SHO	Show on Policy
				SOK	Survey Okay

6. Enter **Notes** for each disposition as needed

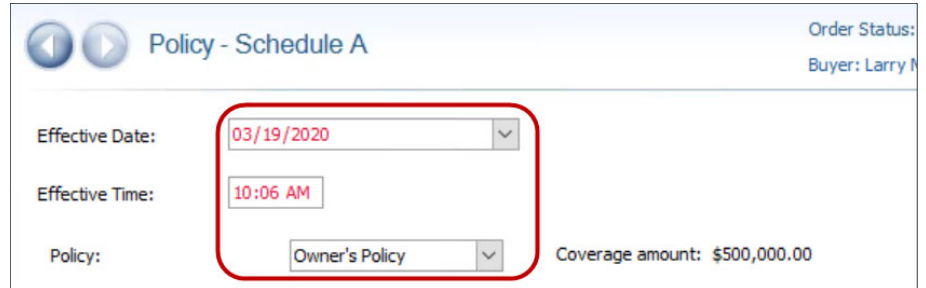
Requirements/Exceptions:							
Type	Number	Code	Description	Disposition Code	Notes	Include on Owner's Policy	Include on Loan Policy
Exception	1.	r4	In order to complete this repor...	SHO	Enter notes here.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Exception	2.	T1	Property taxes, which are a lie...	SHO		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The **Include on Owner's Policy** and **Include Loan Policy** check boxes are already checked. **Uncheck each box** to remove the entry from the policy.

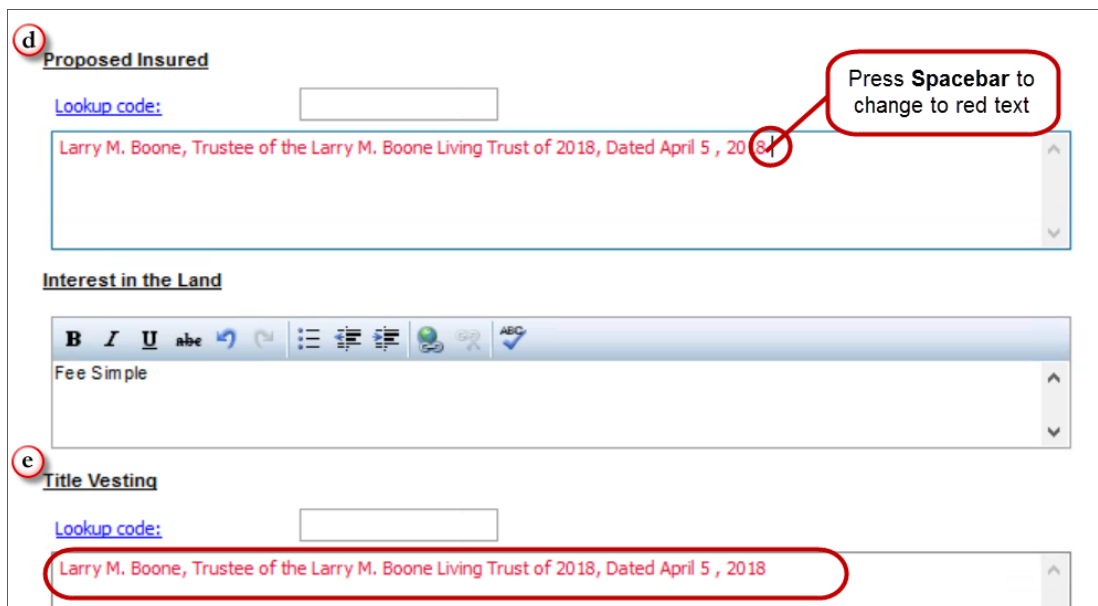
### Preparing the Policy

1. Navigate to the **Policy – Schedule A** screen
2. Select/enter the,

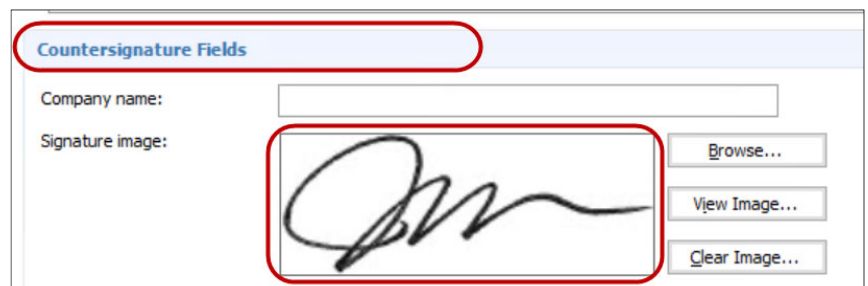
- a) **Effective Date**
- b) **Effective Time**
- c) From the **Policy** drop-down, select the **Owner's Policy**, if applicable



- d) **Proposed Insured**
  - i. If no changes, press the spacebar after the last character (to show red text) or enter vesting information from deed
  - ii. Highlight entry, press **Ctrl + C** to copy
- e) **Title Vesting**, press **Ctrl + V** to paste Proposed Insured entry

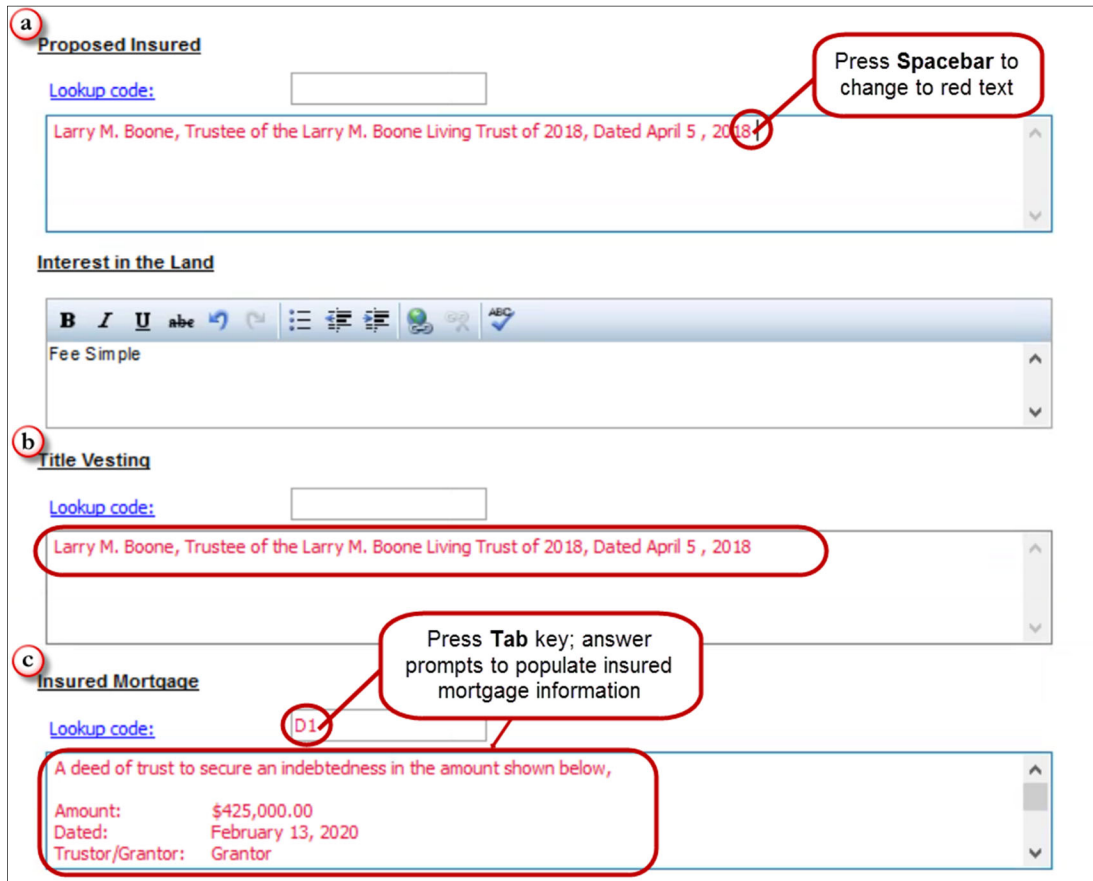


3. Click the **Countersignature Fields** more/less bar
4. Verify a signature is shown in the **Signature image** field; if not, click the **Lookup code** link to select (refer to the internal matrix if you are unsure of the authorized signatory)



## Preparing Policies with Instructions

5. From the **Policy** drop-down, select the **Loan Policy**, if applicable
6. Enter the,
  - a) **Proposed Insured**
    - i. If no changes, press the spacebar after the last character (to show red text) or enter vesting information from deed
    - ii. Highlight entry, press **Ctrl + C** to copy
  - b) **Title Vesting**, press **Ctrl + V** to paste Proposed Insured entry
  - c) **Insured Mortgage**
    - i. In the **Lookup code** field enter **D1**; press the **Tab** key
    - ii. Answer prompts to populate the insured mortgage information




**a) Proposed Insured**

Lookup code:

Larry M. Boone, Trustee of the Larry M. Boone Living Trust of 2018, Dated April 5 , 2018

Press **Spacebar** to change to red text

**Interest in the Land**

**B I U nbe** 

Fee Simple

**b) Title Vesting**

Lookup code:

Larry M. Boone, Trustee of the Larry M. Boone Living Trust of 2018, Dated April 5 , 2018

**c) Insured Mortgage**

Lookup code:


Press **Tab** key; answer prompts to populate insured mortgage information

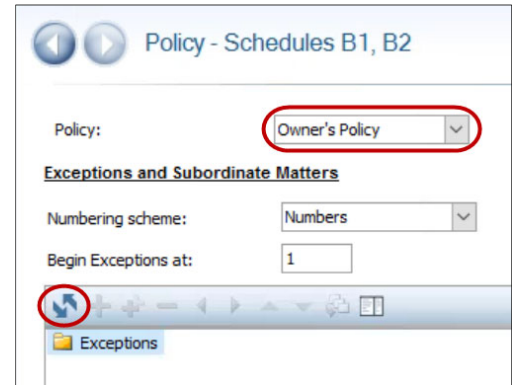
A deed of trust to secure an indebtedness in the amount shown below,

Amount:	\$425,000.00
Dated:	February 13, 2020
Trustor/Grantor:	Grantor


7. Repeat **Steps 3-4** above

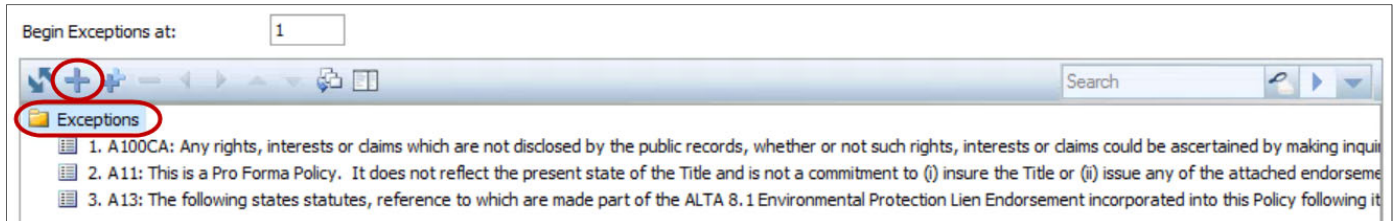
## Preparing Policies with Instructions

8. Navigate to the **Policy – Schedule B1, B2** screen
9. From the **Policy** drop-down, select the **Owner's Policy**
10. Click the **Start Policy**  icon

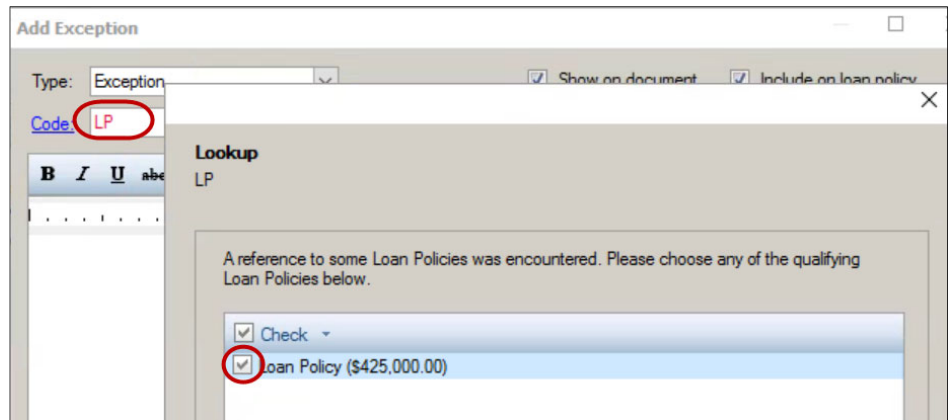


Once the exceptions populate the grid, add the Deed of Trust

11. Highlight the **Exceptions** folder
12. Click the **Add Exception or Subordinate Matter**  icon

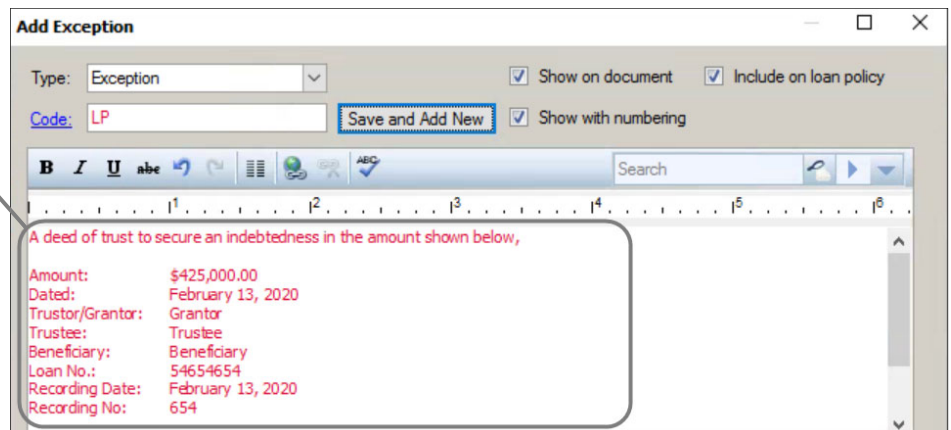



13. In the **Code** field, enter **LP**; press the **Tab** key
14. When prompted, check the applicable **Policy** check box
15. Click the **OK** button

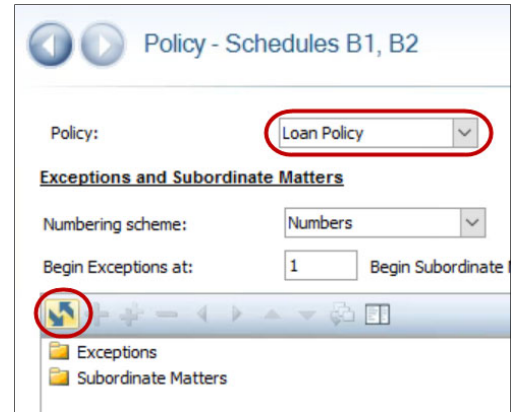


Deed of Trust information is populated.

16. Click the **OK** button



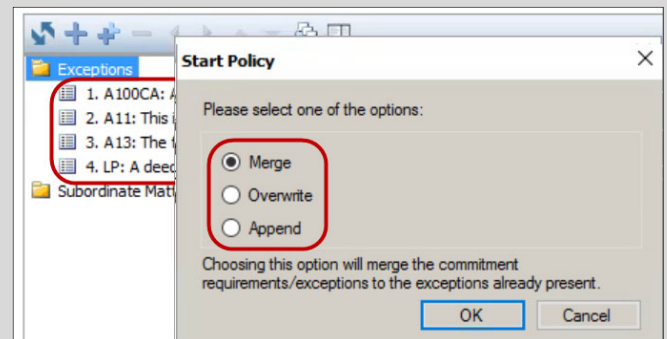
17. Navigate to the **Policy – Schedule B1, B2** screen
18. From the **Policy** drop-down, select the **Loan Policy**
19. Click the **Start Policy**  icon



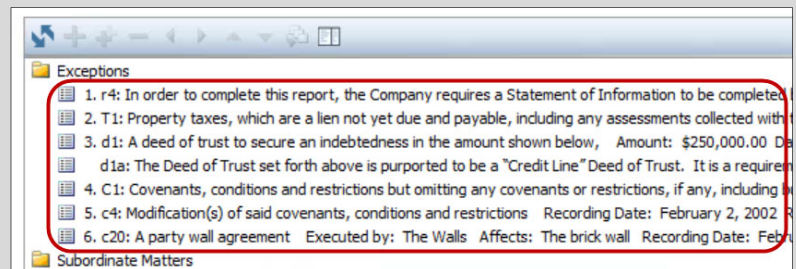
NOTE: If the policy is already started and exception exist, when you click the **Start Policy** icon, you are prompted to check the radio button for the appropriate option.

- › **Merge** – adds only new exceptions to the existing
- › **Append** – adds all exceptions to the existing; this is rarely used as duplicates are added
- › **Overwrite** – overwrites all existing exceptions

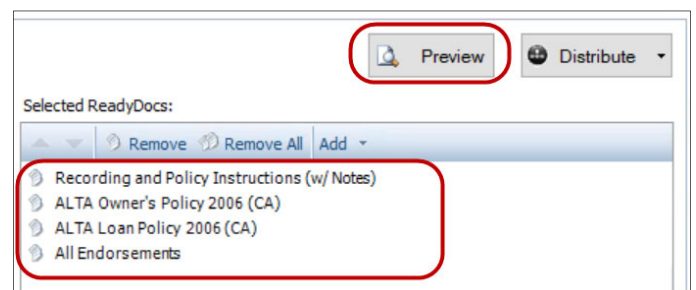
Click the **OK** button to complete.



Any updates needed after the policy is started are to be made directly on the **Schedule B1, B2** screen.



20. Click the **Documents** button
21. Preview the,
  - a) **Recording and Policy Instructions (w/Notes)**
  - b) **Policy(cies)**
  - c) **Endorsements**, only if not checked on Schedule A; you may need to select the endorsement from a state-specific forms folder





## Preparing Policies with Instructions

NOTE: Only standard endorsements show on **Schedule A** of the applicable policy when added on the **Endorsements** screen.

**SCHEDULE A**  
(continued)

6. This policy incorporates by reference those ALTA endorsements selected below:

- ☐ 4-06 (Condominium)
- ☐ 4.1-06
- ☐ 5-06 (Planned Unit Development)
- ☐ 5.1-06
- ☒ 6-06 (Variable Rate)
- ☐ 6.2-06 (Variable Rate--Negative Amortization)
- ☐ 8.1-06 (Environmental Protection Lien) Paragraph b refers to the following state statute(s): None

22. From the **Document Distribution** screen, uncheck all documents except the **Recording and Policy Instructions** document

23. **Publish** to smartVIEW

**Document Distribution**

Documents will be distributed in the order shown

<input checked="" type="checkbox"/> Check		View	Stamp All			
	Distribute	Status	Document	For	Stamp	
	<input checked="" type="checkbox"/>		Recording and Policy Instructions (w/ Notes)	Commitment		
	<input type="checkbox"/>		ALTA Owner's Policy 2006 (CA)	Owner's Policy (\$500,000.00)		
	<input type="checkbox"/>		ALTA Loan Policy 2006 (CA)	Loan Policy (\$425,000.00)		
	<input type="checkbox"/>		All Endorsements	CLTA 100.1 - Restrictions, Encroachm...		
	<input type="checkbox"/>		All Endorsements	ALTA 1-06 - Street Assessments - Loa...		
	<input type="checkbox"/>		All Endorsements	ALTA 17-06 - Access and Entry - Loan ...		

**Merge**

☒ None

☐ All

**Action**

☐ Print

☐ Email

☒ **Publish**

☐ Save to file

**Distribute**

24. From the **Document Distribution** screen uncheck the **Recording and Policy Instructions** document

25. Check the corresponding radio button for those documents you wish to merge and publish as one document (i.e., Loan Policy and endorsements)

26. Check the **Merge All** radio button

**Document Distribution**

Documents will be distributed in the order shown

Distribute	Status	Document	For	Stamp
<input type="checkbox"/>		Recording and Policy Instructions (w/ Notes)	Commitment	
<input type="checkbox"/>		ALTA Owner's Policy 2006 (CA)	Owner's Policy (\$500,000.00)	
<input checked="" type="checkbox"/>		ALTA Loan Policy 2006 (CA)	Loan Policy (\$425,000.00)	
<input checked="" type="checkbox"/>		All Endorsements	CLTA 100.1 - Restrictions, Encroachm...	
<input checked="" type="checkbox"/>		All Endorsements	ALTA 1-06 - Street Assessments - Loa...	
<input checked="" type="checkbox"/>		All Endorsements	ALTA 17-06 - Access and Entry - Loan ...	

Check only those documents that should be merged and published as one document

Merge: ☐ None ☒ All

Action: ☐ Print ☐ Email ☒ Publish ☐ Save to file

27. Publish to smartView > Post Closing folder

**smartview Document Post**

Document Name:  
Loan Policy

Folder:  
Documents\Post Closing

Comments:

☐ All documents use same Folder and Comments

smartview Order ID : 30296748

28. Repeat **Step 24-27** if you have a second policy with endorsements to publish

### Updating Checklist Tasks

Once all documents are published, from smartVIEW compare your Recording and Policy Instruction documents against your policies.

- > If no discrepancies are found, from the corresponding SoftPro order,
  - a) Click the **Checklist Tasks** button
  - b) Highlight the **POLICY: Review Typed Policy** task in the grid
  - c) From the **Status** drop-down, select **Completed**

## Preparing Policies with Instructions


Checklist Tasks

Order Status: Canceled  
Buyer: Larry M. Boone, Trustee o...  
Transaction Type: Purchase

Status	Task	Category	Occurs	Due Date	Assigned To
✓ Completed	ITP: Review Typed Title Product		Post-closing	10/25/2019 10:28 ...	FNFI Team Novare
✓ Completed	ITP: Title Product Distributed to Client		Post-closing	10/25/2019 10:29 ...	California Escrow
✓ Completed	REC: Documents to be Recorded		Post-closing	10/24/2017 12:00 ...	California Escrow
✓ Completed	REC: Documents Recorded		Post-closing	11/24/2019 10:29 ...	California Escrow
✓ Completed	POLICY: Uploaded for Typing		Pre-closing		California Escrow
✓ Completed	POLICY: Ready for Typing		Post-closing	10/28/2019 10:29 ...	FNFI Team Novare
✓ Completed	POLICY: Review Typed Policy		Post-closing	10/30/2019 10:29 ...	FNFI Team Novare
	POLICY: Texas HOI remittance		Pre-closing		
	POLICY: HOI Policy Received Signature Required		Pre-closing		
✓ Completed	POLICY: Package - Lender		Post-closing	11/25/2019 10:29 ...	California Escrow
	POLICY: Package - Buyer		Pre-closing		

Occurs: ☐ Pre-closing ☐ Post-closing

Code:  Task: POLICY: Review Typed Policy Status: **Completed**

- › If discrepancies are found, from the corresponding SoftPro order,
1. Click the **Checklist Tasks** button
  2. Click the **Add Task**  icon
  3. Click the **Task** link (below the grid)
  4. In the **Search** field, enter *revision*; press the **Enter** key
  5. Double-click the **POLICY: Revision Request** task to add to the grid

Checklist Tasks

Order Status: Ca  
Buyer: Larry M. f

Status	Task	Category	Occurs
✓ Completed	ITP: Title Product Distributed to Client		Post-closi
✓ Completed	REC: Documents to be Recorded		Post-closi
✓ Completed	REC: Documents Recorded		Post-closi
✓ Completed	POLICY: Uploaded for Typing		Pre-closi
✓ Completed	POLICY: Ready for Typing		Pre-closi
✓ Completed	POLICY: Review Typed Policy		Pre-closi
✓ Completed	POLICY: Texas HOI remittance		Pre-closi
✓ Completed	POLICY: HOI Policy Received Signature Required		Pre-closi
✓ Completed	POLICY: Package - Lender		Pre-closi
✓ Completed	POLICY: Package - Buyer		Pre-closi

Occurs: ☒ Pre-closing ☐ Post-closing

Code:  Task: **Task** Category:

**Lookup Table - T - Checklist Task - Novare**

Retrieve Entry Insert Entry Search: **revision**

Found 6 matches.

Task	Status	AssignedTo	Due Date	Pre/Post-Closin
HOA: Estoppel Revision Reque...				
INS: Revision Request	Required	Value = "E...	Call Task...	fxc
ITP: Revision Request	Required		Call Task...	fxc
OTH: Revision Request (To Ve...	Required	.InHouseProce...	Call Task...	fxc
<b>POLICY: Revision Request</b>	<b>Required</b>	Value = "E...	Call Task...	fxc
UPDATE: Revision Request	Required		Call Task...	fxc