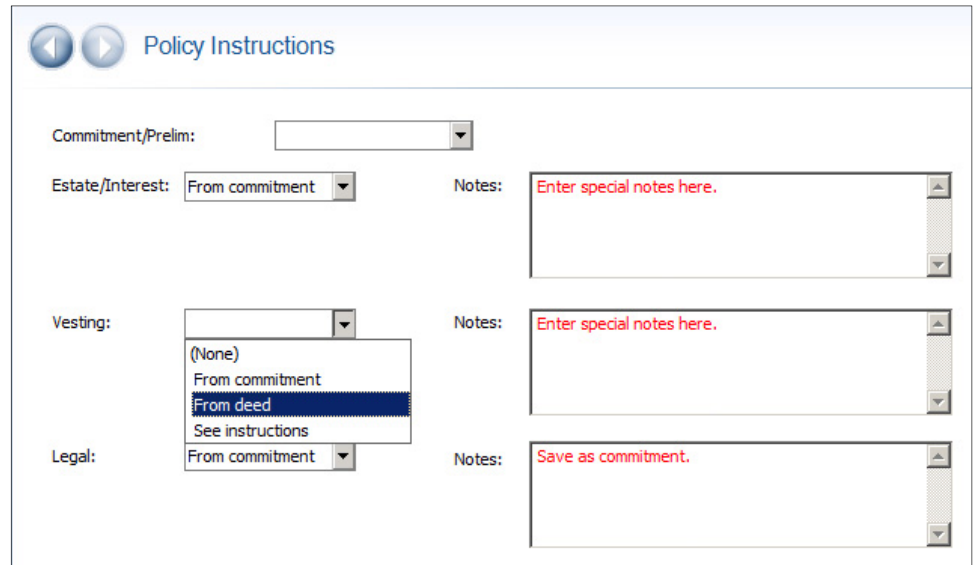


Follow these instructions to prepare a Policy Instructions document.

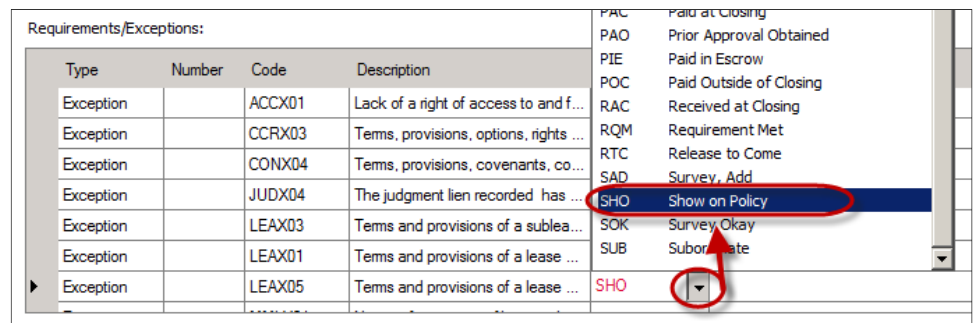
1. Navigate to the **Policy Instructions** screen
2. If necessary, in the **Estate/Interest** drop-down, change the default; in the **Notes** field, enter any special instructions
3. In the **Vesting** drop-down, select the appropriate option; in the **Notes** field, enter any special instructions
4.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



The screenshot shows the 'Policy Instructions' form. It has four main sections, each with a dropdown menu and a text area for notes:

- Commitment/Prelim:** A dropdown menu.
- Estate/Interest:** A dropdown menu set to 'From commitment'. Notes: 'Enter special notes here.'
- Vesting:** A dropdown menu with options: '(None)', 'From commitment', 'From deed', and 'See instructions'. Notes: 'Enter special notes here.'
- Legal:** A dropdown menu set to 'From commitment'. Notes: 'Save as commitment.'

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



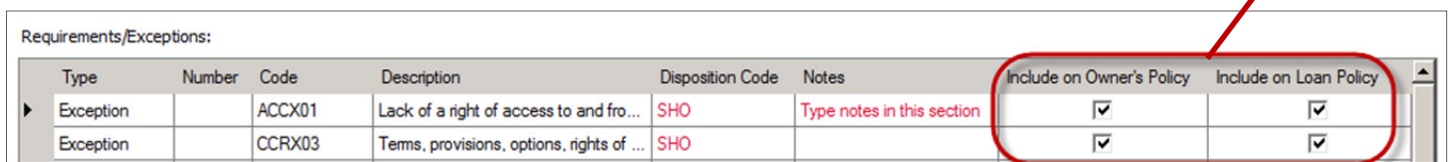
The screenshot shows a table titled 'Requirements/Exceptions:' with columns: Type, Number, Code, and Description. A dropdown menu is open next to the 'Code' column, showing a list of codes and their descriptions. The code 'SHO' is highlighted, and its description 'Show on Policy' is visible. A red circle highlights the dropdown arrow.

Type	Number	Code	Description
Exception		ACCX01	Lack of a right of access to and f...
Exception		CCRX03	Terms, provisions, options, rights ...
Exception		CONX04	Terms, provisions, covenants, co...
Exception		JUDX04	The judgment lien recorded has ...
Exception		LEAX03	Terms and provisions of a sublea...
Exception		LEAX01	Terms and provisions of a lease ...
Exception		LEAX05	Terms and provisions of a lease ...

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

6. As necessary, enter notes for each disposition

The **Include on Owner's Policy** and **Include Loan Policy** check boxes are already checked. **Do not change these check boxes.**



The screenshot shows the 'Requirements/Exceptions:' table with an additional column 'Disposition Code' and a 'Notes' column. The 'Disposition Code' column contains 'SHO' for both rows. The 'Notes' column contains 'Type notes in this section'. The 'Include on Owner's Policy' and 'Include on Loan Policy' checkboxes are checked for both rows. A red circle highlights these checkboxes, with a red arrow pointing to the text 'Do not change these check boxes.' from the previous block.

Type	Number	Code	Description	Disposition Code	Notes	Include on Owner's Policy	Include on Loan Policy
Exception		ACCX01	Lack of a right of access to and fro...	SHO	Type notes in this section	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Exception		CCRX03	Terms, provisions, options, rights of ...	SHO		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

7. Preview and distribute the Policy Instructions document to the Policy Department as normal
8. Submit to the Policy Instructions workflow