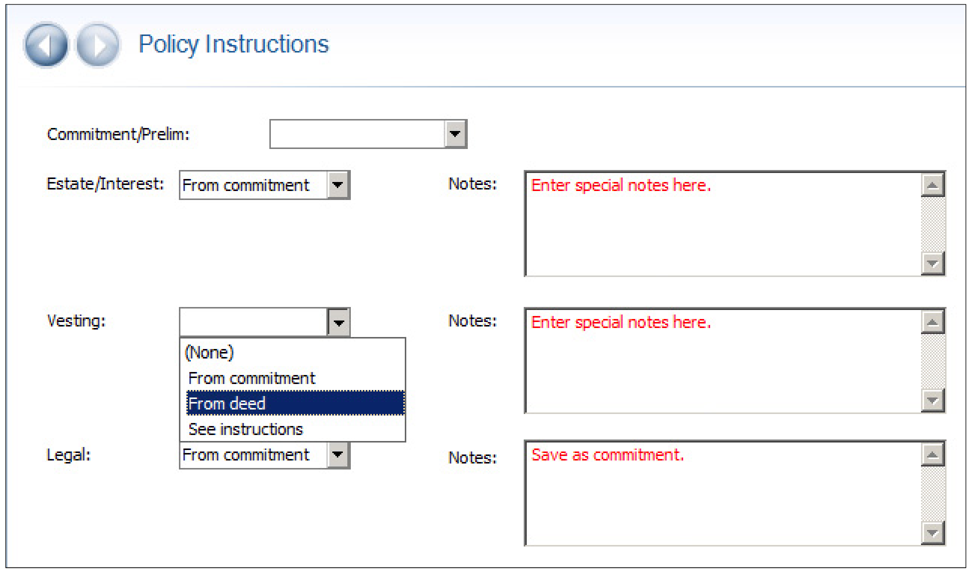
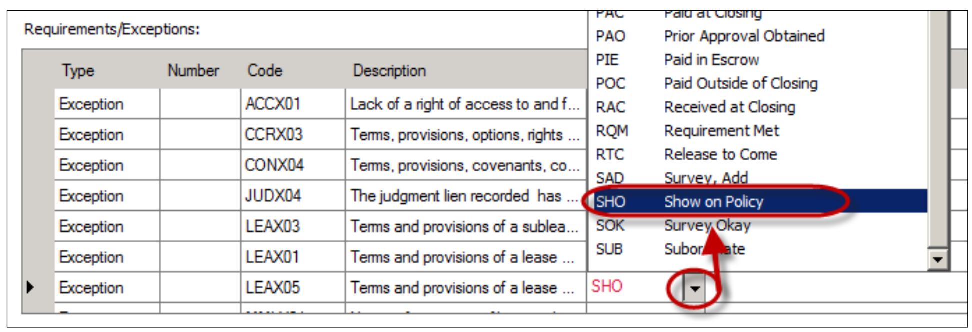
Preparing the Document

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



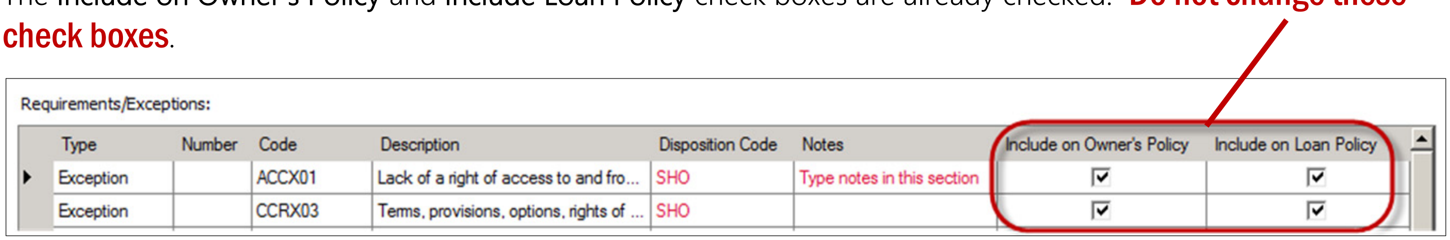
5. Click the **Disposition Code** drop-down arrow to select a disposition for each exception/requirement



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**.



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