TitleFusion / The Fund Integration

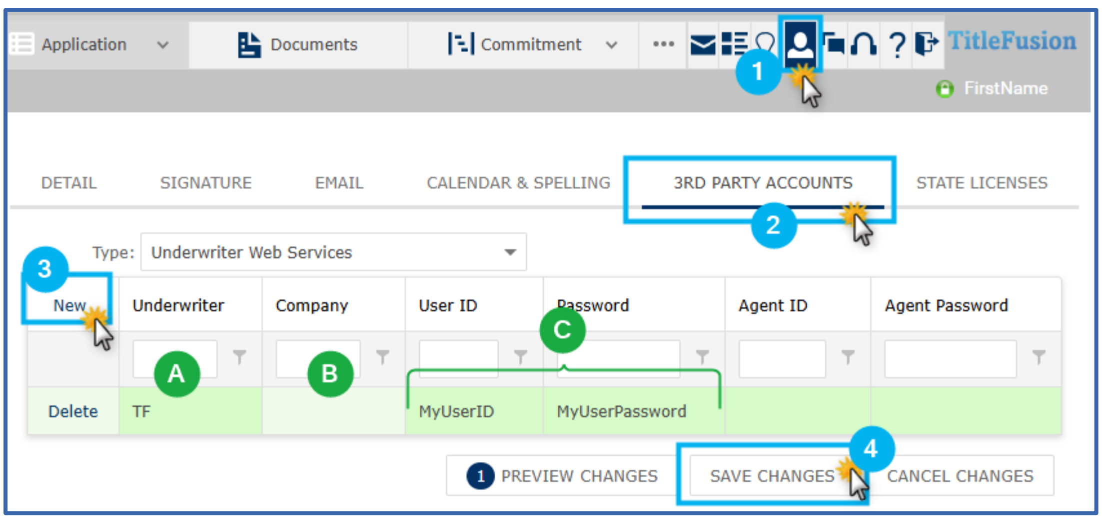
When The Fund's user credentials and file requirements are satisfied, users may request the following services through the integration: Title Searches, CPL requests, and Jacket requests.

Requirements

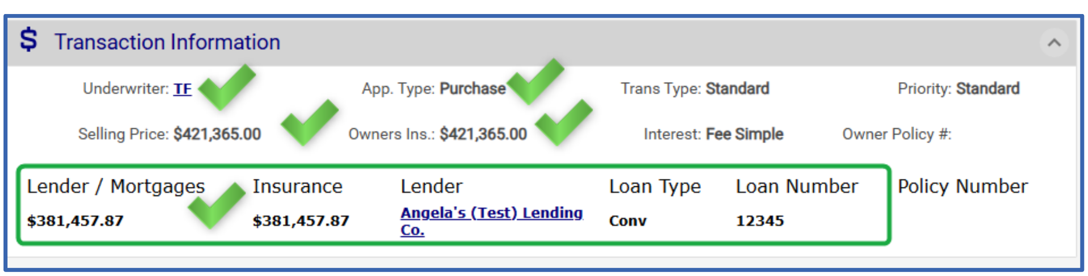
- Each user's credentials for The Fund **MUST** be added to the user's **3rd Party Accounts** section of **User Details**.

  To add or edit underwriter user credentials:

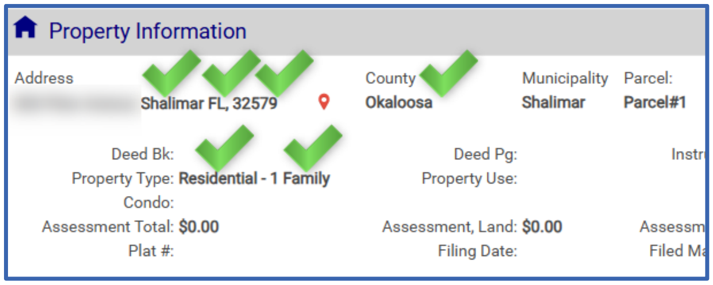
  1. Select the **User Details** icon in the TitleFusion utility bar.
  2. Select the **3rd PART ACCOUNTS** tab.
  3. With **Underwriter Web Services** selected in the **Type** field, select the **New** button.
     A. **Underwriter**: Select TF (Old Republic National Title / The Fund)
     B. **Company** (not required): Select a company if the login is utilized for only one company
     C. Key-in the **User ID** and (User) **Password**
  4. Select **SAVE CHANGES** at the bottom of the table



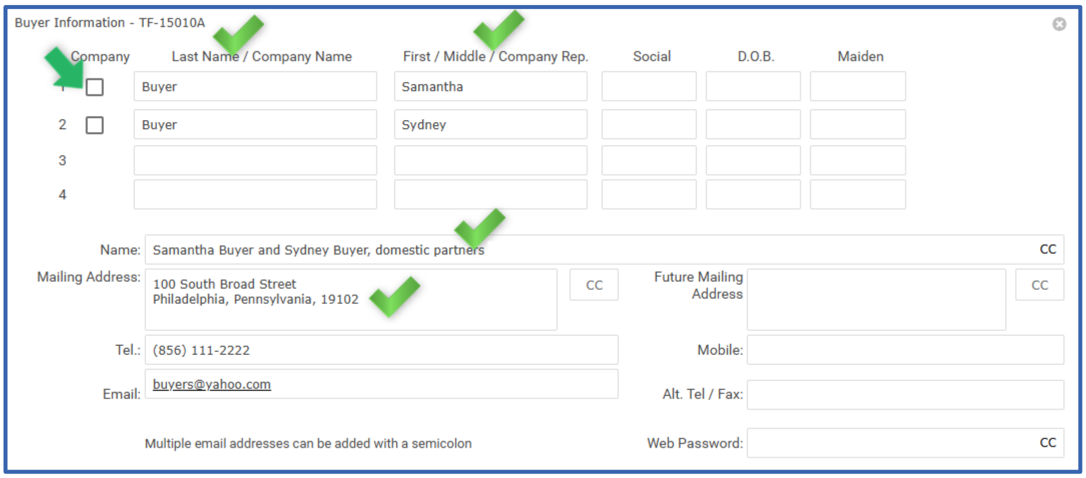
- The following **Application** information is required:
  - **Transaction Information**: **App. Type**, **Selling Price/Owners Insurance** (if applicable); The Fund (TF) must be selected as the **Underwriter**; and all **Loan/Lender Insurance** details (if applicable).



- **Property Information**: **Property Mailing City**, five-digit **Zip Code**, **State**, **County**, **Property Type**, **Residential Type** (if applicable)

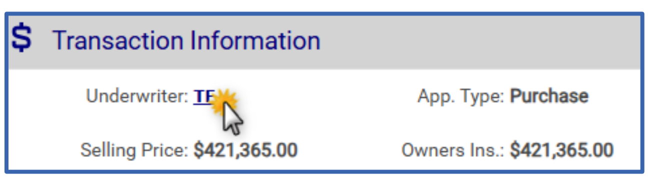


- **Buyer/Seller Information**: Identify the party as a **Company** (Entity, Estate or Trust) (if applicable), **First** and **Last Name** OR **Company Name** and **Company Rep**, **Collective Names**, 2 lines **Current Mailing Address** (Line 1: Street Number and Street Name; Line 2: City, State and Zip Code)



Access the Underwriter Integration

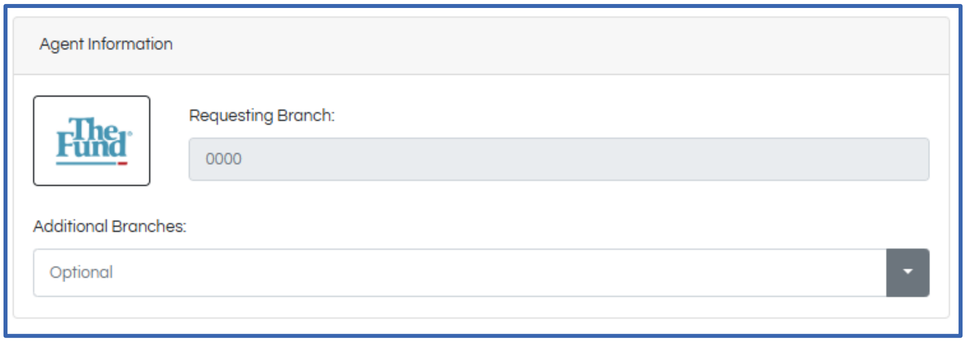
Access the underwriter integration by selecting the hyperlink in the **Transaction Information** section of the Application screen.



Agent Information

Requesting Branch: Displays the branch associated with user's credentials.

Additional Branches: May be selected for requesting products, if applicable.



Lender Information

Loan(s): Select the loan from the drop-down to associate with products being requested (ex. Lender CPL or Mortgagee Policy Jacket).

Insurance Clause:

- When available, the Ins. Clause from the Lender phonebook entry is defaulted; otherwise "Its successors and/or assigns as their interests may appear" will display.
- Users may edit the language as needed prior to creating products.

Title Search

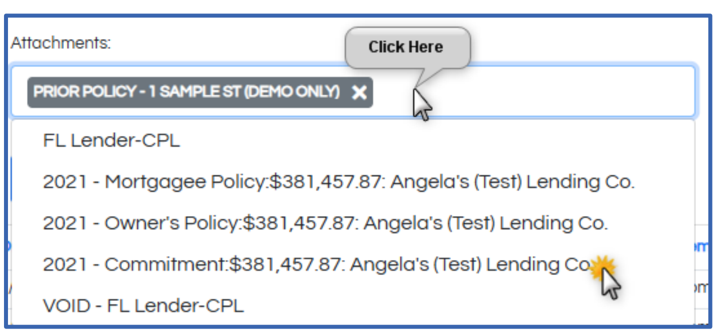
Search Type: Select the type of search from the options provided by The Fund in the drop-down.

Note: Select the Update Branch Product to order updates for the file as often as needed.

Need by Date: Defaults to 3 days from the current date; adjust as necessary

Attachments (optional)**:** Items in the file's **Documents** section may be attached to the order

- Click inside the **Attachments** field and select the document(s) from the list to include with the order
- Click on the "x" to remove a document from being attached to the order.



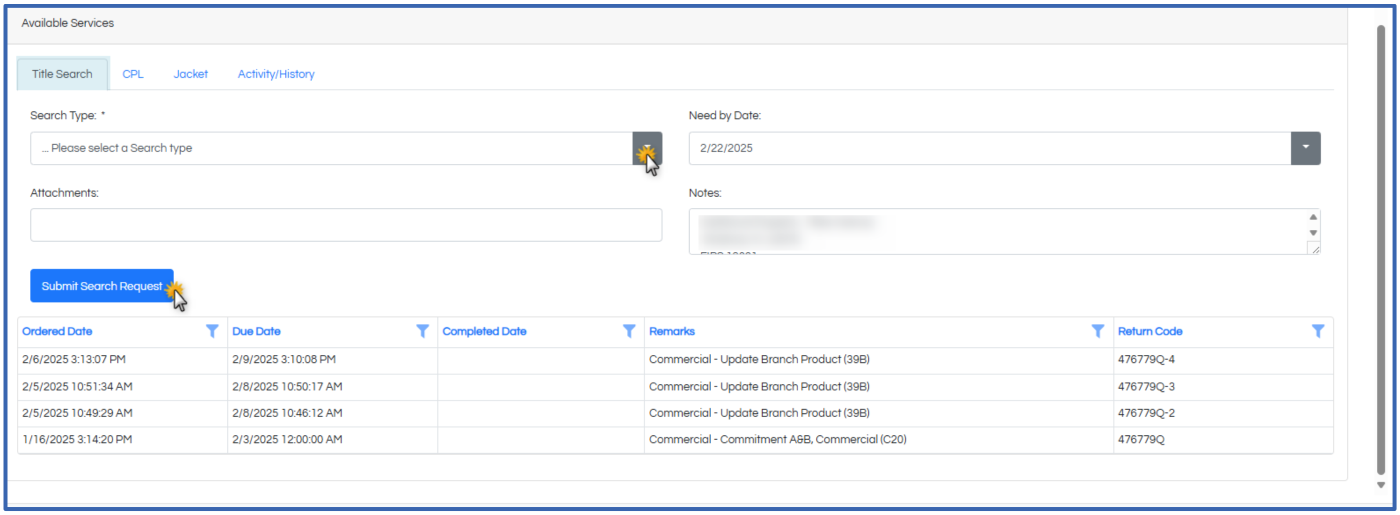
Notes: Enter notes to be sent to The Fund with the order

- Notes submitted with orders will be recorded in the **Notes** section.

  <u>Note:</u> The Fund currently does not support searches for multiple properties in a single file. TitleFusion will automatically add a note with the additional property details when a file consists of multiple properties.

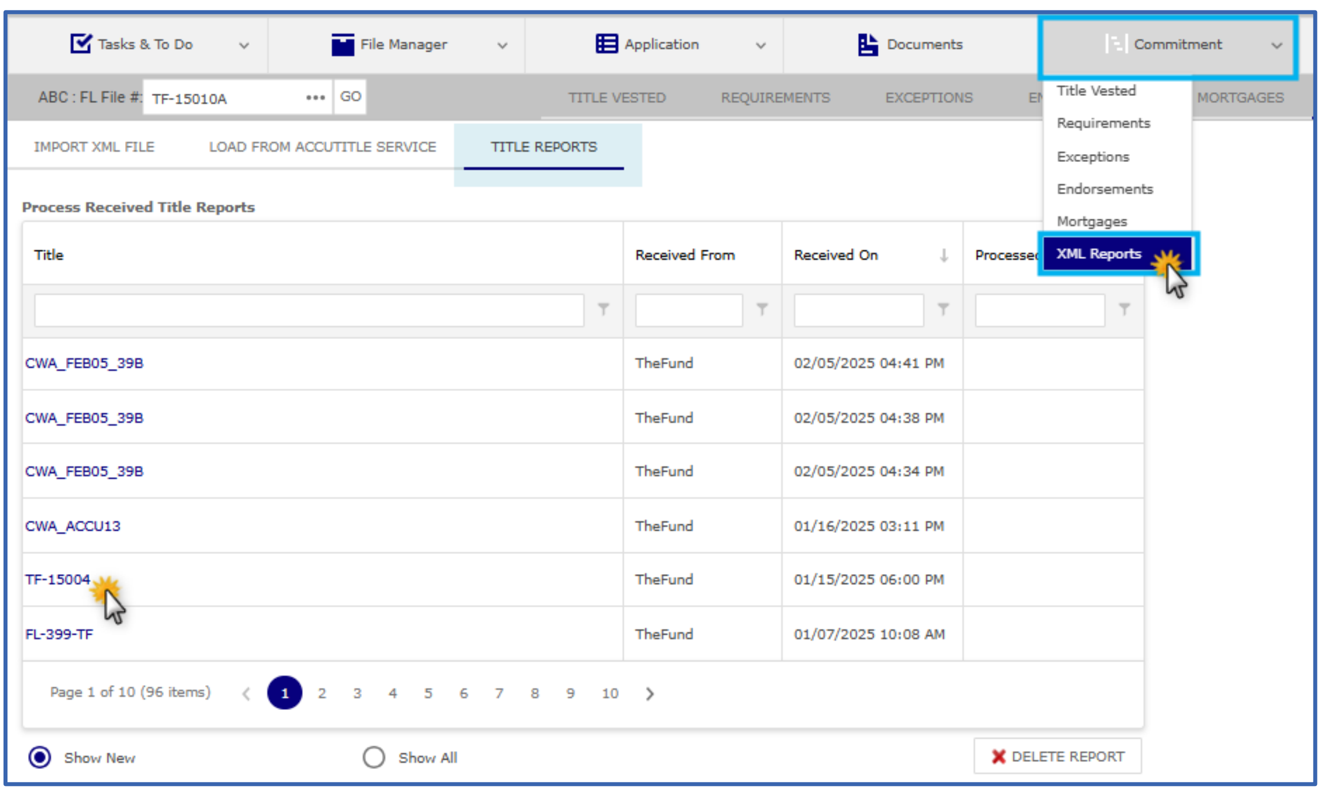
Submit Search Request: Click the button to place the Title Search order

- Order details will be displayed in the grid.
- Orders may be managed/tracked in the **View Existing Orders** section of **Orders & Searches**.



Process Completed Title Search Orders

1. Under the **Commitment** tab, select **XML Reports**.
2. The **TITLE REPORTS** tab displays all title reports available to import. Search and/or select the **Title** to Import the desired report.

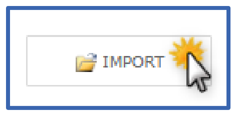


3. Use the radio buttons to manage information in each section to Import*****.**

   **** Note: The Fund does <u>not</u> return Standard E&Rs; users may use a set to easily add them to the file <u>before</u> importing & appending the title report's E&Rs.*

   - **Import & Replace** *overrides* any existing information in the corresponding section of the file.
   - **Import & Append** *adds* the details to existing information in the corresponding section of the file.
   - **Do Not Import** *prevents* report details from being included in the corresponding section of the file.

4. Select the **IMPORT** button at the bottom of the page. Supporting documents from the vendor will automatically be loaded to the file.



CPLs

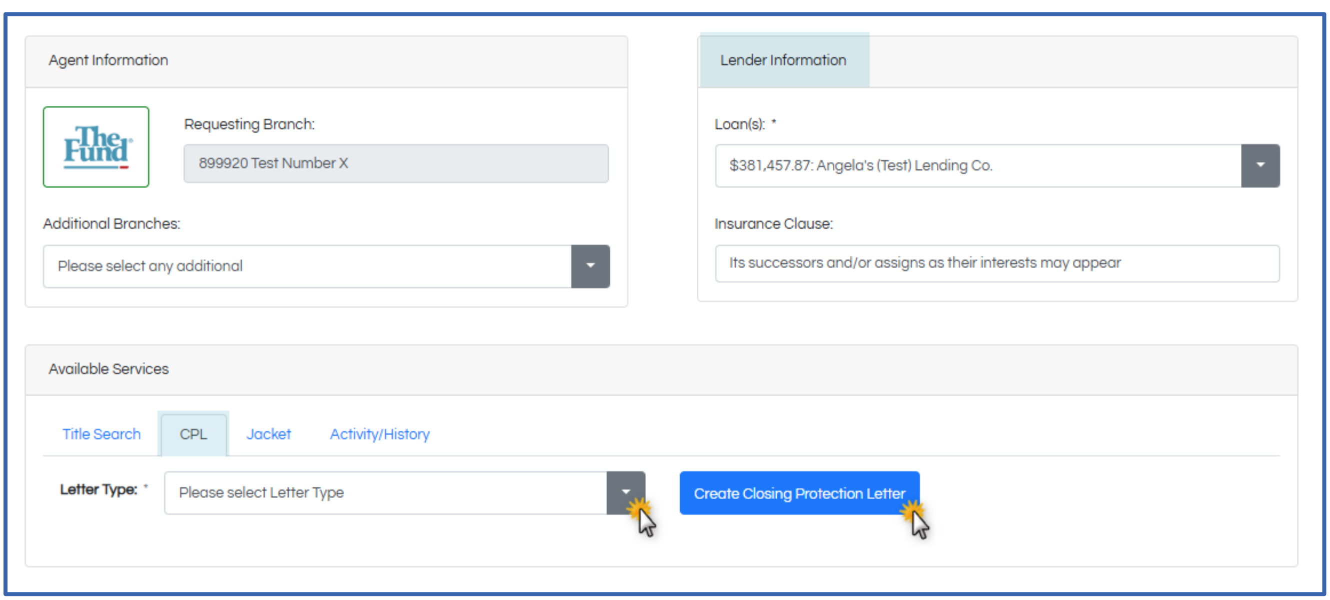
Lender Information: Select and/or modify details for the request.

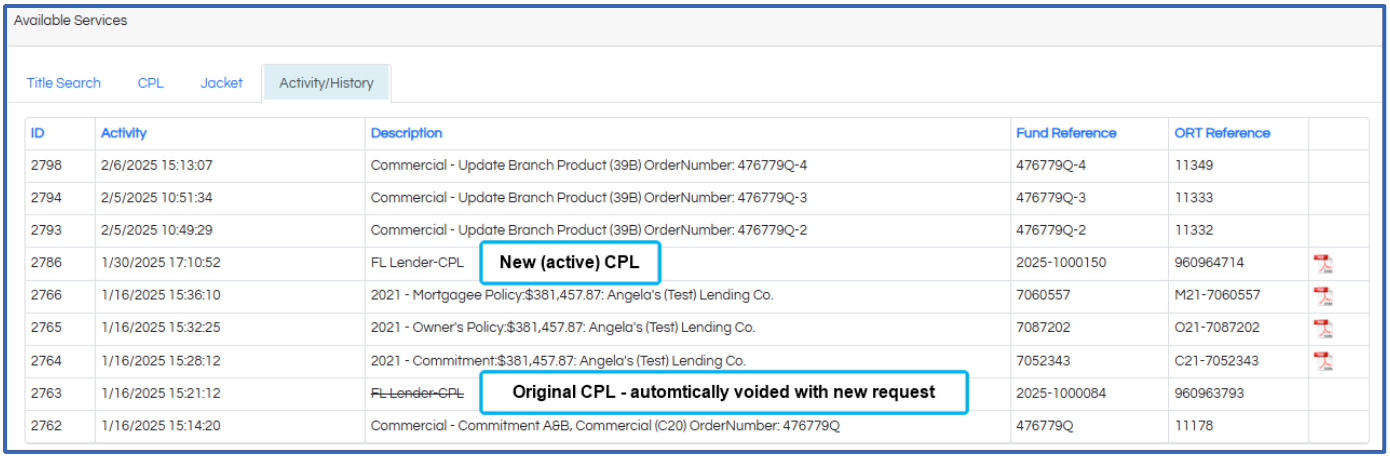
Letter Type: Select the letter type.

Create Closing Protection Letter: Click the button to request the CPL

- Document Viewer displays the CPL
- Request details are recorded in **Activity/History**
- PDF is saved to **Documents**

Note: Although a CPL cannot be manually voided, subsequent CPL requests for a file will automatically void the previous version.





ID	Activity	Description	Fund Reference	ORT Reference
2798	2/6/2025 15:13:07	Commercial - Update Branch Product (39B) OrderNumber: 476779Q-4	476779Q-4	11349
2794	2/5/2025 10:51:34	Commercial - Update Branch Product (39B) OrderNumber: 476779Q-3	476779Q-3	11333
2793	2/5/2025 10:49:29	Commercial - Update Branch Product (39B) OrderNumber: 476779Q-2	476779Q-2	11332
2786	1/30/2025 17:10:52	FL Lender-CPL **New (active) CPL**	2025-1000150	960964714
2766	1/16/2025 15:36:10	2021 - Mortgagee Policy:$381,457.87: Angela's (Test) Lending Co.	7060557	M21-7060557
2765	1/16/2025 15:32:25	2021 - Owner's Policy:$381,457.87: Angela's (Test) Lending Co.	7087202	O21-7087202
2764	1/16/2025 15:28:12	2021 - Commitment:$381,457.87: Angela's (Test) Lending Co.	7052343	C21-7052343
2763	1/16/2025 15:21:12	~~FL Lender-CPL~~ **Original CPL - automtically voided with new request**	2025-1000084	960963793
2762	1/16/2025 15:14:20	Commercial - Commitment A&B, Commercial (C20) OrderNumber: 476779Q	476779Q	11178

Jackets

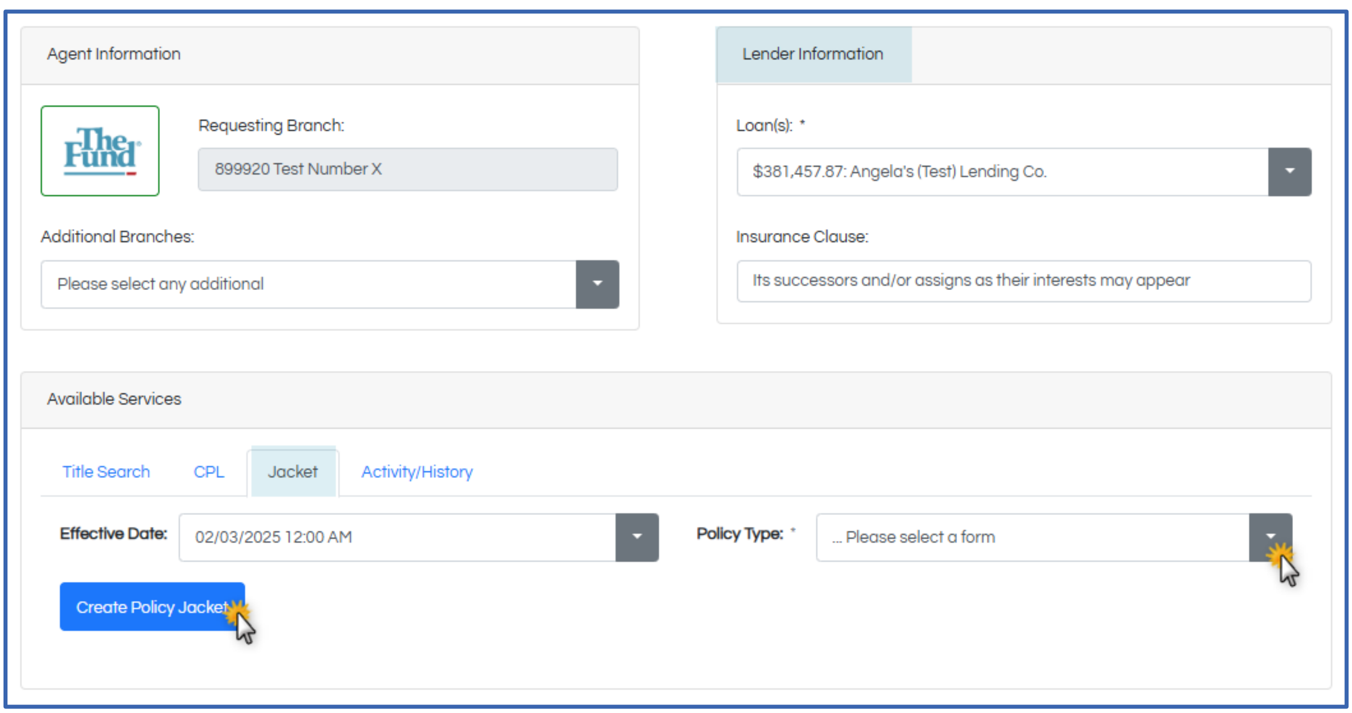
Effective Date: Defaults to the file's selected Closing Date or the current date.

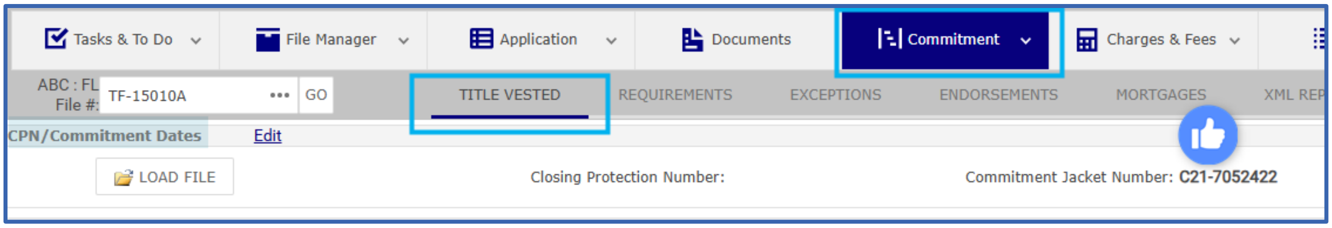
Policy Type: Select the jacket type for the order.

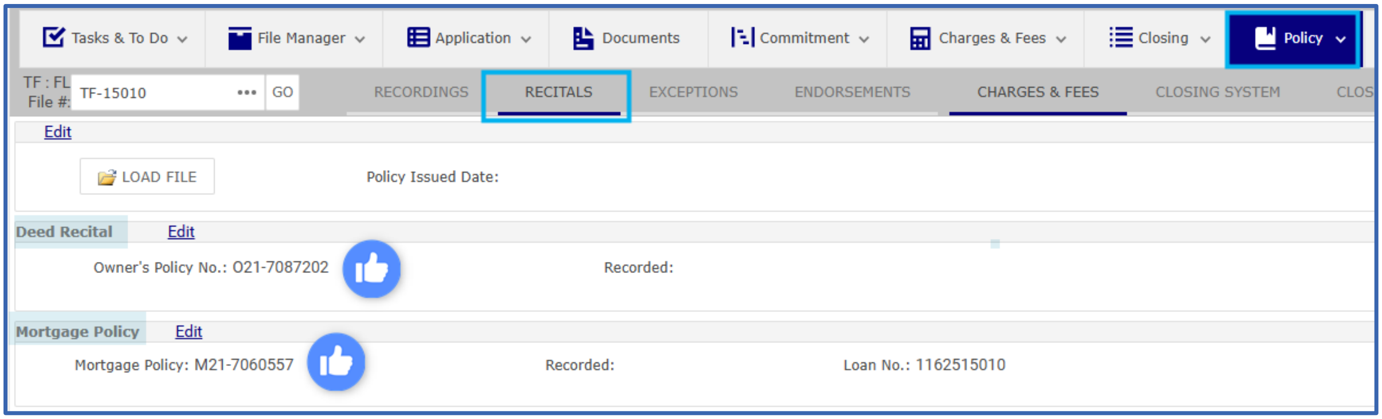
- If requesting a Mortgagee Policy, select details in the **Lender Information** section *prior* to requesting the jacket.

Create Policy Jacket: Click the button to request the Jacket.

- Document Viewer displays the Jacket
- Request details are recorded in **Activity/History**
- PDF is saved to **Documents**
- Commitment Jacket numbers are saved to the **Title Vested** section of the **Commitment** Module.
- Policy Jacket numbers are saved to the **Policy Recitals** section of the **Policy** Module.







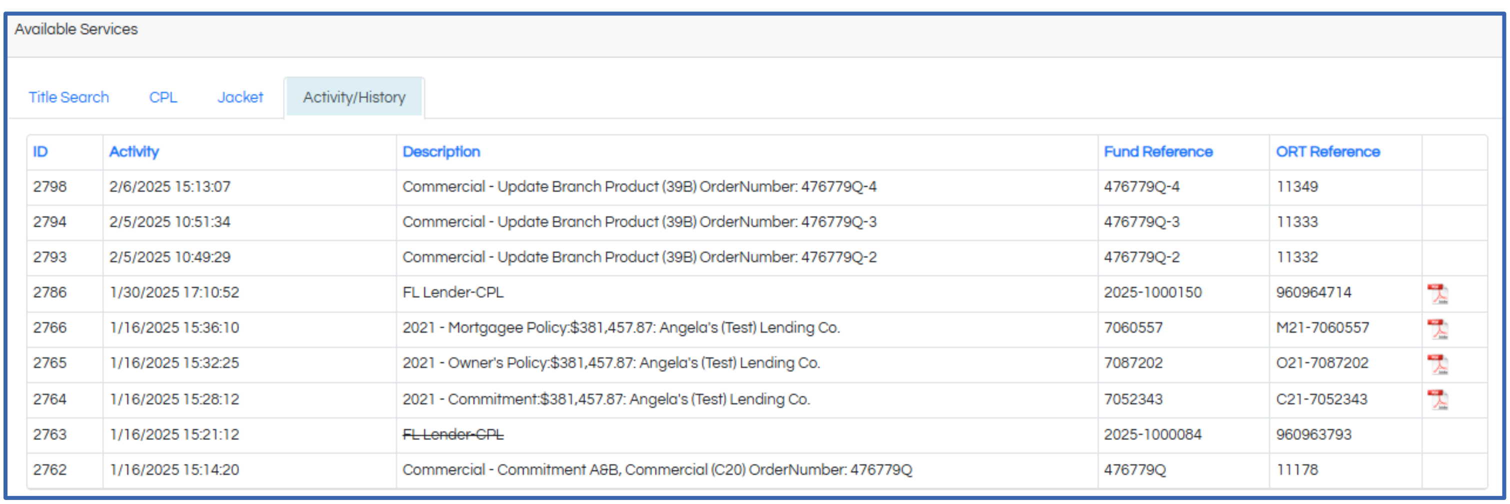
Voiding Jackets

- Jackets may **NOT** be voided through the integration.
- To void a Jacket, users **MUST** send an email to formcontrols@thefund.com & reference the Policy Jacket number.

Activity/History

The following details are recorded for all products requested for the file through the integration:

- **Activity:** Date and time the product was requested
- **Description:** Product description
- **Fund Reference**: Number associated with the request
- **ORT Reference**: Serial number associated with the product (ex. Policy Jacket number)
- **PDF** icon: Click to view product in the Document viewer



Available Services

Title Search | CPL | Jacket | Activity/History

ID	Activity	Description	Fund Reference	ORT Reference	
2798	2/6/2025 15:13:07	Commercial - Update Branch Product (39B) OrderNumber: 476779Q-4	476779Q-4	11349	
2794	2/5/2025 10:51:34	Commercial - Update Branch Product (39B) OrderNumber: 476779Q-3	476779Q-3	11333	
2793	2/5/2025 10:49:29	Commercial - Update Branch Product (39B) OrderNumber: 476779Q-2	476779Q-2	11332	
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2766	1/16/2025 15:36:10	2021 - Mortgagee Policy:$381,457.87: Angela's (Test) Lending Co.	7060557	M21-7060557	
2765	1/16/2025 15:32:25	2021 - Owner's Policy:$381,457.87: Angela's (Test) Lending Co.	7087202	O21-7087202	
2764	1/16/2025 15:28:12	2021 - Commitment:$381,457.87: Angela's (Test) Lending Co.	7052343	C21-7052343	
2763	1/16/2025 15:21:12	~~FL Lender-CPL~~	2025-1000084	960963793	
2762	1/16/2025 15:14:20	Commercial - Commitment A&B, Commercial (C20) OrderNumber: 476779Q	476779Q	11178	