

QUICK TYPE EXCEPTIONS AND REQUIREMENTS IN EPIC

1. Create your exception or requirement list on a word document and save in a network folder, or on your desktop.
2. Open your desired EPIC file, Click on the Policy Tab, Select Quick Type Exceptions

The screenshot displays the EPIC web application interface. At the top, there is a navigation bar with the ATGF logo on the left and menu items: File, Tools, Reports, Main, and Log Off. Below the menu, it shows the current login as 'ATGF / defaultadmin'. On the right side of the header, there is an 'EPIC' logo and a 'Powered by: ATTORNEY DONE DEAL' badge.

The main content area shows a file header with 'File #: 201500323Test' and 'File Name: TEST CPI3'. Below this is a 'POLICY ISSUANCE TOOLBAR™' with tabs for 'CPL', 'Commitment', 'Pre-Approve', and 'Policies'. The 'Policy' tab is selected, and there are sub-tabs for 'GenInfo', 'Policy', 'Closing Disclosure/Disbursement', and 'Docs'. The 'Policy' sub-tab is active.

The 'Master Action List' section contains a 'Premium Calculator' table:

Premium Calculator	
MP 1(\$100,000.00):	\$1,038.00 ()
TRID	
TRID MP 1:	\$ 525.00
Difference commitment/TRID	\$0.00
Remit to	
ATGF:	\$1,038.00

Below the calculator, there are sections for 'Schedule A' (with sub-items: Commitment/Owner/Lender Policy, Recording Information), 'General Exceptions' (with sub-items: Survey exceptions, Mechanic's lien exception), and 'Issues/Special Exceptions' (with an 'Arrange' button). A note states: 'PLEASE NOTE: Colorado Insurance Regulation 3-5-1, Section 7(D) requires all proposed title exceptions other than standard or pre-printed exceptions to make reference to the recording information of the document to be excepted from coverage. This section also generally prohibits the use of generic exceptions. Please consult the regulation or underwriting support if you have specific questions on the applicability of this provision.'

The 'Quick Type Exceptions' section lists various categories:

- Easements
- General
- Installment Land Contracts
- Leases
- Mortgages, Deeds of Trust, Liens
- Plats and Condominiums
- Restrictions/Covenants
- Tax Language
- Vesting Codes

At the bottom left of the page, a status message reads 'locked successfully'.

3. Within Quick Type Exceptions, Select Create New:

PLEASE NOTE: Colorado Insurance Regulation 3-5-1, Section 7(D) requires all proposed title exceptions other than standard or pre-printed exceptions to make reference to the recording information of the document to be excepted from coverage. This section also generally prohibits the use of generic exceptions. Please consult the regulation or underwriting support if you have specific questions on the applicability of this provision.

Quick Type Exceptions [Create New](#)

Select

4. Copy the exceptions on your word document and paste on Quick Type Exceptions, name the file, click update:

Quick Type Exceptions [Create New](#) [Convert to Regular Exceptions](#)

,mnbvfd **Name:** ,mnbvfd

[Select Another](#)

Conveyance of an undivided one-half (1/2) interest in all oil rights in deed recorded in Book 54 Page 234 in the office of the Clerk and Recorder, Archuleta County, Colorado, and all rights, privileges and easements with respect thereto, and any and all assignments thereof or interests therein. No oil, gas or other minerals or mineral rights or interests in the property are covered hereby, and an exception is made as to all oil, gas, other minerals and mineral interests in the property including all rights of ingress, egress, exploration and production in connection therewith.

Easements and other matters as shown on the plat of Pagosa Meadows Unit Two recorded September 13, 1971, as Reception No. 74883, in the office of the Clerk and Recorder, Archuleta County, Colorado.

Covenants and restrictions recorded in Book 126 Page 95, Book 156 Page 134, Book 201 Page 15, and any amendments and supplements thereto, in the office of the Clerk and Recorder, Archuleta County, Colorado.

Any tax, assessment, fee or charge by reason of the inclusion of the subject property in the Pagosa Lakes Property Owners Association, Pagosa Area Water and Sanitation District and the Fairfield Recreation Club, as supported by the most recent Certificate of Taxes Due, issued by the Archuleta County Treasurers Office.

5. Double check that each exception is listed correctly in each green box.

6. Repeat steps 1-5 to create quick type Requirements

The list of Quick Type Exceptions appears on Schedule B of the Commitment below the list of individual exceptions/requirements that you select and type on the Policy Tab.

If the exceptions/requirements need to be arranged differently or manipulated, select Convert to Regular Exceptions/Requirements.

You will then be able to arrange the Quick Type Exceptions/Requirement within the other Exceptions/Requirements on the Policy Tab.

You can add as many groups within the Quick Type as you want and combine them with a file.

Once the exceptions/requirements are Converted, they will be removed from the group showing in Quick Type. Your Quick Type File will be available for use on future files.

See the conversion below:

The screenshot displays the ATGF (Attorney Tools Group File) software interface. At the top, there is a navigation bar with 'File', 'Tools', 'Reports', 'Main', and 'Log Off' menus. The current login is identified as 'ATGF / defaultadmin'. The main window shows a file titled '201500323Test' with the name 'TEST CPI3'. A sidebar on the left contains a 'Master Action List' with sections for 'Schedule A' (including Commitment/Owner/Lender Policy and Recording Information), 'General Exceptions' (including Survey and Mechanic's lien exceptions), and 'Issues/Special Exceptions' (including Easements, General, Installment Land Contracts, Leases, Mortgages, Deeds of Trust, Liens, Plats and Condominiums, Restrictions/Covenants, Tax Language, and Vesting Codes). A 'Premium' section is also visible. The main content area shows a 'Quick Type Exceptions' dialog box with a text area containing legal text: 'Conveyance of an undivided one-half (1/2) interest in all oil rights in deed recorded in Book 54 Page 234 in the office of the Clerk and Recorder, Archuleta County, Colorado, and all rights, privileges and easements with respect thereto, and any and all assignments thereof or in the property minerals and exploration...'. Below this text is a 'Name' field with the value ',mnbvfd' and an 'Update' button. A confirmation dialog box from Microsoft Internet Explorer is overlaid on top, asking 'Are you sure you want to convert to regular exceptions?' with 'OK' and 'Cancel' buttons. The background text in the dialog box is partially obscured but includes 'Easements e September : Archuleta Co' and 'Covenants a Page 15, an Recorder, Archuleta County, Colorado.'



File #: 201500323Test File Name: TEST CPI3

CPL Commitment Pre-Approve Policies

GenInfo Policy Closing Disclosure/D

Master Action List

Schedule A

- Commitment/Owner/Lender Policy
- Recording Information

General Exceptions

- Survey exceptions
- Mechanic's lien exception

Issues/Special Exceptions

Arrange

PLEASE NOTE: Colorado Insurance Regulation 3-5-1, Section 7(D) re than standard or pre-printed exceptions to make reference to the excepted from coverage. This section also generally prohibits the use regulation or underwriting support if you have specific questions on t

Quick Type Exceptions

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- Installment Land Contracts
- Leases
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- Plats and Condominiums
- Restrictions/Covenants
- Tax Language
- Vesting Codes

Premium Ca

MP 1(\$100,0

TRID

TRID MP 1:

Difference

commitmen

Remit to

ATGF:

LawyerDoneDeal -- Webpage Dialog

Quick Type Exceptions

Create New Convert to Regular Exceptions

,mnbvfd Name: ,mnbvfd Update

Select Another

Conveyance of an undivided one-half (1/2) interest in all oil rights in deed recorded in Book 54 Page 234 in the office of the Clerk and Recorder, Archuleta County, Colorado, and all rights, privileges and easements with respect thereto, and any and all assignments thereof or interests therein. The property are covered here minerals and mineral interest exploration and production in

Easements and other matters September 13, 1971, as Recd Archuleta County, Colorado.

Covenants and restrictions re Page 15, and any amendmen Recorder, Archuleta County, Colorado.

Any tax, assessment, fee or charge by reason of the inclusion of the subject property in the Pagosa Lakes Property Owners Association, Pagosa Area Water and Sanitation District and the Fairfield Recreation Club, as supported by the most recent Certificate of Taxes Due, issued by the Archuleta County Treasurers Office.

Microsoft Internet Explorer -- ...

Conversion Successful

OK

https://www.attorneydoneal.com/uat/atgplus/lfmaster.asp?formasp=purfileedit&tb=TPAppXML&id=29866

File Edit View Favorites Tools Help

Recording information

Difference commitment/TRID	\$0.00
Remit to ATGF:	\$1,038.00

General Exceptions

- Survey exceptions
- Mechanic's lien exception

Issues/Special Exceptions [Arrange](#)

PLEASE NOTE: Colorado Insurance Regulation 3-5-1, Section 7(D) requires all proposed title exceptions other than standard or pre-printed exceptions to make reference to the recording information of the document to be excepted from coverage. This section also generally prohibits the use of generic exceptions. Please consult the regulation or underwriting support if you have specific questions on the applicability of this provision.

Quick Type Exceptions

- Easements
- General
- Installment Land Contracts
- Leases
- Mortgages, Deeds of Trust, Liens
- Plats and Condominiums
- Restrictions/Covenants
- Tax Language
- Vesting Codes
- Foreclosure Commitment
- Other (Custom Entry)
 - Other (Custom Entry) Commitment Mortgage Policy [edit](#) | [delete](#)
 - Other (Custom Entry) Commitment Mortgage Policy [edit](#) | [delete](#)
 - Other (Custom Entry) Commitment Mortgage Policy [edit](#) | [delete](#)
 - Other (Custom Entry) Commitment Mortgage Policy [edit](#) | [delete](#)

Verify right of access to and from the land Yes No

Requirements

Quick Type Requirements

- Business Entities
- Corrective Deeds

session renewed successfully

The entries will appear as "Other (Custom Entry)." Once they have been converted, they can be edited, deleted and arranged as necessary.