



**CAP**  
Clerical  
Assistance  
Program

# Wisconsin Operations Member-Agent Instructions



Advocus's Clerical Assistance Program (CAP) helps you function more efficiently as a title agent and as a real estate attorney. At all times, you are acting in the capacity of the title agent and perform these core title services, as specified by RESPA:

- » Examining and evaluating title evidence to determine insurability;
- » Preparing and issuing the title commitment;
- » Assisting in clearing title underwriting objections; and
- » Preparing and issuing final title policies.

Please use the following procedures to process a CAP file.

## 1. Open File Using Either Advocus Place an Order page or Paperless Closer

- » Go to Place an Order, <http://order.atgf.com>.
- » Log in to PaperlessCloser, <http://resource.atgf.com>, to open a CAP file. Upon submission of complete information, PaperlessCloser will assign a file number for the transaction.

## 2. Obtain Title Search from Advocus Wisconsin Office

- » The Advocus Wisconsin office can order the title search on your behalf. Email the Advocus Wisconsin office to request a title search; be sure to include the file number and attach the prior policy, if available. Email the title search request to [orders@advocustitle.com](mailto:orders@advocustitle.com) or fax to 262.347.0110.
- » If you prefer to obtain the title search directly from the search provider, you are responsible to email the search to Advocus.

## 3. Receive Abstract and Commitment Preparation Instructions (CPI) from Advocus

- » Upon receipt of the title search, Advocus will prepare and email the abstract, CPI, title search package, search invoice, and CAP instruction forms to you.

## 4. Review Abstract, Examine Search Documents, and Complete CPI

- » After review of the abstract and title search, complete the CPI worksheet and email it to [orders@advocustitle.com](mailto:orders@advocustitle.com) or fax to 262.347.0110.
- » The member-agent is responsible for all determinations of insurability.
- » For questions concerning search examination, underwriting, insurability, or any other title-related issue, contact the Advocus Wisconsin office at 262.347.0102 or email [wisconsin@advocustitle.com](mailto:wisconsin@advocustitle.com).

NOTE: The CPI worksheet must be completed in full, including premium and endorsement fees.

## 5. Commitment and Document Preparation

- » Advocus prepares the commitment and additional documents based on your instructions on the CPI worksheet. We will email the following documents to you:
  - Commitment
  - Title Invoice/CAP Invoice
  - Other affidavits, endorsements, and forms, as requested on the CPI

## 6. Review Documents

- » Review the commitment and related documents to determine if any changes are needed.
- » If changes or revisions are necessary, you can edit the files yourself in REsource (if available) or email your revised CPI or marked-up commitment to [orders@advocustitle.com](mailto:orders@advocustitle.com). Upon direction, Advocus will make the changes and return the documents to you.



**Advocus**  
National Title Insurance Company

[info@advocustitle.com](mailto:info@advocustitle.com)  
800.252.0402  
[www.advocus.com](http://www.advocus.com)

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## 7. Distribute Commitment and Documents

- » Issue the commitment, invoice, and title documents to the seller, buyer, lender, closing agent, legal counsel, Realtor®, and any other appropriate party.
- » You are responsible for all underwriting decisions and issuance of endorsements. If you have any underwriting questions or concerns, contact the Advocus Wisconsin office at [wisconsin@advocustitle.com](mailto:wisconsin@advocustitle.com) or 262.347.0102.

## 8. Closing

- » Closings can be completed by you or by Advocus. If transactions are closed by Advocus, geographic limitations apply. An additional travel fee may be added for transactions outside the Milwaukee metro area.
- » Advocus provides both full and limited closing services. Limited closing services include such items as settlement statement preparation, escrow services, wire services, and deed preparation services. Please review the [Closing Services Price Guide for CAP Members \(Advocus Form 4231-WI\)](#).

## 9. Post-Closing and Final Policy Issuance

- » If Advocus closes the transaction, Advocus staff will order a final update search, mark up the commitment, and issue and disburse the final policy.
- » If you close the transaction, you are responsible to order the final update search, mark up the commitment, and transmit a copy of the commitment and closing documents to [wiclosings@advocus.com](mailto:wiclosings@advocus.com). Advocus staff will issue and disburse the final policy.



**Advocus**

National Title Insurance Company

[info@advocustitle.com](mailto:info@advocustitle.com)

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[www.advocus.com](http://www.advocus.com)

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