**AMS/AMS2**

<https://www.wfgsecure.com/AMS/Login.aspx> is WFG’s primary Agent Management System page. It includes the ability to search by agent name and to run various reports. TRICK: Date format is 201608 – for August, 2016.

<https://www.wfgsecure.com/AMS2> is the agent facing management system used by agents to generate policy and CPL forms. It also is our Over Limit management system in which an agent can enter OTL requests and for the underwriting team to enter or manage OTL requests.

More specialized reports can be accessed under the [Agency] dropdown, [Administration2] then [Reports]

**Cautionary Notices**

From time to time, Underwriters identify potential fraud and identity theft situations and issue bulletins to warn our agents and directs. These addresses and/or names are entered into Resware and should flag when a file is opened. WFG is also an agent for Stewart Title and we post their bulletins into Resware.

Because we enter information about victims of identity theft as well as known bad actors and to avoid tainting the reputation of others with similar names, the bulletins are intentionally vague.

The policy and Procedure document on this can be accessed[**here**](http://sharepoint.williston.local/Compliance/Compliance%20Documents/1%20WFG%20Policies%20and%20Procedures/4%20RE%20Settlement%20Policies%20and%20Procedures/WFG%20PP%20Suspicious%20Transaction%20or%20Situation%20and%20Cautionary%20Notice%20v1.5%2002.15.2023%20FINAL.pdf)

At the time a WFG bulletin it created, the person creating it is supposed to upload additional information to help us eliminate “false positives” when we get a hit on a name. The underwriters can access that information here: <http://sharepoint.williston.local/cautionary/SitePages/Home.aspx>

Stewart Bulletins can be accessed at <https://www.virtualunderwriter.com/en/special-alerts.html>

**CyberSecurity Training**

<https://wfg.efront.thecybermaniacs.com/> Cyber Maniacs – cyber security awareness training managed by WFG Information Security

**DayForce**

<https://www.dayforcehcm.com/mydayforce/mydayforce.aspx> Dayforce is our Human Resources Platform. For salaried employees its primary relevance is to post your time off requests. This uses a different login than your email.

**DeedPlotter**

Deedplotter is a third party software that will map legal descriptions. We have a group subscription coordinated through purchasing and Linda Uyeda [LUyeda@willistonfinancial.com](mailto:LUyeda@willistonfinancial.com) .

**E-Mail Archive**

Archive system is up and running at <https://archive.williston.local/web.ui/>

Login/Password should be firstname and lastname (no punctuation or spaces) and the same password you use to log into email

There are two interfaces for searches. The default is an older style. To switch interfaces click “try our new interface” in the upper right corner.

DOS wildcards \* and ? should work in searches, except for the initial letter of a word.

The archive platform doesn’t seem to like Internet Explorer, but works in Chrome

**E-mail encryption**

Any e-mail through the WFG systems should be automatically encrypted if system detects certain things in the contents like an SSN. You can also force Email encryption by including “#encrypt#” (without the quotation marks) anywhere in email body or subject line

**GlobalProtect VPN**

WFG has a virtual private network that is required for secure access to some of WFG’s platforms and generally helps with info security. If you don’t have the VPN (some limits on non-WFG computers) put in an IT request.

**Google Earth**

For those using Google Earth, this will add Section-Township-Range Overlay to Google Earth. In Texas and Louisiana, it adds the pre-statehood surveys and the Arpent Sections. <http://www.earthpoint.us/Townships.aspx> The cost is something like $50/year. Well worth it.

**GoTo Meeting/GoTo Webinar**

We have GoTo Meeting and GoTo Webinar available for offering training and education or just collaboration. Joey Elizabeth Grampa [JGrampa@wfgnationaltitle.com](mailto:JGrampa@wfgnationaltitle.com) can set you up to present using the 500 seat platform for your training class or for smaller groups.

**H.I.P.S.**

The Human Resources Information Technology Procurement System (“H.I.P.S.”) is located at <https://williston.service-now.com/> and is used to place orders for employee changes in status, new hires, equipment acquisitions and tech support requests. Your account must be enabled before first use.

ServiceNow Quick Start Guide is located at:

**IT Helpdesk**

[helpdesk@willistonfinancial.com](mailto:helpdesk@willistonfinancial.com) is the email address to send all IT support requests.

**Legal Support Requests**

<http://home.williston.local/> Under the “Legal Tab” is where to go when we need a corporate lawyer assigned to a project or for contract review.

**1.** SharePoint Legal is located on the WFG home page (intranet portal) for easy access.

**2.** Submit a new request by hovering over Legal and Click on New Legal Request

**3.** Complete the new task form, making sure to give a clear and concise description/details of request.

**4.** Attach and upload any pertinent documents for legal to review.

**5.** When the form is submitted:

a. An email notice is sent to Joe McCabe and Vera Van Bergh requesting assignment.

b. An email is sent to the requestor acknowledging receipt of their request and advising requestor who has been assigned the task.

**Long Term Filing of Contracts/Agreements**

We use CSC Global as an electronic file cabinet where all legal documents, contracts, and agreements are stored and indexed. If you have something that falls into this category, it goes should be sent to Vera Van Bergh [VVanBergh@willistonfinancial.com](mailto:VVanBergh@willistonfinancial.com) or Jennifer Maki [JMaki@willistonfinancial.com](mailto:JMaki@willistonfinancial.com).

<https://my.cscglobal.com/cscportal/web/gateway/compliance-activity>

In the cover email, please note any expiration or renewal dates and dates on which follow-up review should be made.

As the person originating, you should also document those same dates on your Outlook Calendar and invite the manager for whom you did the work, simply so that we have backups on any reminders.

If there are original documents that must be maintained in physical form, such as a promissory note, letter of credit, certificate of deposit, WFG has a document safe in Portland. Original documents should be scanned and preserved in CSC. The originals should be sent to Jennifer Maki, our corporate paralegal.

**PACER**

<https://pacer.login.uscourts.gov/csologin/login.jsf?court_id=00idx> is the public access to federal court and bankruptcy court filings. It is very useful for evaluating bankruptcies.

For ease of billing, we share the same login: WFG18881 and password: Rocky10\*.

**Policy Search**

We have two platforms that can find prior WFG Policies and they seem to bring up different results.

<http://poa_planetforms.williston.local/square9web/index.html#/direct?op=2&db=1> Provides access to WFG Policy images. Click [Renew License] new menu appears. Select [Policies] [Searches] [All Fields]

The second can be accessed under [www.WFGagent.com](http://www.WFGagent.com) [Agent Services][Back Title]

**RamQuest Archive Access**

All files searched or closed in RamQUest have been archived to: <http://snavpsqlssrs01.williston.local/Reports/Pages/Report.aspx?ItemPath=%2fRamQuest+Reports%2fRamQuest+Documents>. This may only be accessed in Internet Explorer, not Chrome.

**Resware**

Resware is the escrow, settlement and production software used by WFG in its direct offices, in WFG Lender Services and for our National title production. The monthly per-seat cost is fairly high, but having it does let you directly access all of the documents in a file. Getting a seat is strongly recommended for those servicing direct operations or agents in states where WFG does a majority of the production for agents (like Florida). If you feel your usage case justifies the cost, you can put in a helpdesk ticket.

**SharePoint**

Legal <http://sharepoint.williston.local/legal/SitePages/Home.aspx> See Legal Support Requests

**Skype for Business**

This is Microsoft’s instant messaging system, which also allows screen sharing and video conferencing. If you would like to try it, please put in a helpdesk ticket.

**Sugar CRM**

This is WFG’s Customer Relationship Management platform. It will contain all of the key contacts at each agency, as well as a ready place to check the status of an agent.

**Website Changes**

Any requests to change or update a WFG website should be sent to this email address: [webmaster@poweredbywest.com](mailto:webmaster@poweredbywest.com)

**Westlaw**

We do have a master subscription to Westlaw, but it is fairly expensive so we try to manage costs. If you are handling multiple states or have another need for it, please contact Alan Fields

**WFG Agent**

<https://wfgagent.com/> is the agent facing website. Login will be your standard email login if asked. WFGagent provides access to AMS2 for Policy jackets, CPL and overlimit approvals. A rate calculator and recorded training sessions.

This site includes our agent compliance management system that allows the agent to create Best Practice and other compliance templates. [CMS]

**WFG Cloud**

This creates a sharable directory or file in a secure “cloud” location similar to Dropbox. The resulting files may be shared with persons inside and outside of the company. Individual files and directors may be individually password protected, may allow recipients to read, download, edit and/or upload or erase – all depending on the permissions given.

To access from a browser: <https://wfgcloud.com/secureStore/index.php?redirectUrl=%2FsecureStore%2Findex.php%2Fapps%2Ffiles>

Instructions for Installation and use: <https://wfgcloud.com/guide.pdf>

**WFG Global Address List**

<http://home.williston.local/gal/> This is the master list of all company employees. WARNING it is not always current or complete. Please check your information and send update requests to the helpdesk: [helpdesk@willistonfinancial.com](mailto:helpdesk@willistonfinancial.com)

**WFG-kipedia – the UnderWriting Wiki**

<http://uww.wfgnationaltitle.com/> is the underwriting and escrow resource being developed to eventually evolve into a full blown underwriting reference. It is currently being used by NTS and Lender Services. All WFG employees have access to add and correct information. The State underwriters are expected to periodically review and correct any errors.

Login should be your email login & password. Some of the loaded documents will ask for a separate login and password (we haven’t figured this out yet) which is “wfg” and “wfg”

A separate guide on formatting and use is included in your package

**WFG Global Address List**

<http://home.williston.local/gal/> This site allows you to view employees’ contact information, search for specific employees and export reports in Microsoft Excel format.

You can also get this information directly in Outlook by clicking the “To” button in a new email.

**WFG Blocks Sales University**

<https://wfgsalesuniversity.com/> is the Agent facing sales training resource.

**WFG Labs**

<https://WFGlabs.com> is the training platform for our agency reps and others who are in contact with our agents.

**Williston Main**

<http://home.williston.local/> includes links to many company resources. Among them:

Under the “Compliance” Tab

Policies & Procedures

Complaint Log <http://sharepoint.williston.local/sites/consumercomplaints/default.aspx#InplviewHash6dfd5f63-81a1-4172-a3d7-27f9ee6d34df>=

Fourth C

Compliance Hotline

Under the “Legal” Tab

A link to load a New Legal Department request for assistance or contract review

A “Licensing” dropdown that takes you to an index of every state license for each WFG entity.

Under the “Escrow” Tab

TRID and Closing information

Guides from Lenders

Under the “HR Portal”

Employee handbooks

Official Company Holidays

Job Openings

Under the “Help Desk” Tab

Access WFG Help Desk email addresses for each geographical region

Get remote support

View systems’ status

Under the “IT Dept” Tab

Link to WFG Cloud (See WFG Cloud above)

Link to WFG GAL (See WFG Global Address List above)

Under the Three Dash Menu at the far right

“Get Familiar with WFG” information about different departments and what they do  
<http://home.williston.local/category/get-familiar/>

Company news including Pat Chat

**WFG Scholar**

[www.Wfgscholar.com](http://www.Wfgscholar.com) is our Learning and compliance platform. Each of us are assigned Policies and Procedures documents to acknowledge and courses to take (many with an IT or compliance focus). These are required courses as well as optional courses on this platform.

**WFG Underwriting**

<http://wfgunderwriting.com/> This site includes all of our rate manuals and filed forms for each state, as well as underwriting bulletins. It includes a link to our underwriter directory. The page has categories for uploading underwriting manuals and cases of interest – but neither is currently used.

**Zoom Meetings**

We have Zoom available online video meetings. <https://zoom.us/>

If you need Zoom on a regular basis, please check with the helpdesk. If you need it for a single meeting, Joey Elizabeth Grampa [JGrampa@wfgnationaltitle.com](mailto:JGrampa@wfgnationaltitle.com) can generally facilitate for you.