



Built with ALTA Best Practices Pillar 3 (Information & Data Security) in mind

What the AI suite touches

File status, property addresses, contact names/emails, and title commitment text — read from your production system (Qualia, SoftPro, or ResWare) to draft updates and summaries. There is no independent copy of your full file database sitting anywhere else.

What it does not do

Your data is never used to train a public AI model. Nothing is sold or shared with third parties. AI drafts are stored only as long as needed for your team to review and send them.

Access control

The same role-based access already shown in Settings → Team: escrow and closing staff see status drafts, examiners and pre-processors see commitment summaries, and Amy sees everything — matching how Epic Title's team already divides the file, not a new system to manage.

Encryption & storage

Data is encrypted in transit and at rest, with access logged per user. A security review is completed with Epic Title before go-live, as part of the pilot — not after.

Human-in-the-loop as a safeguard

Because drafts require approval by default during the pilot, that review step also functions as a data-integrity control — a second set of eyes before anything reaches a client, not just a courtesy.

If you decide to stop

Your data and drafts are exported or deleted at your request within 30 days of cancellation. Nothing is held hostage to keep using the product.

This is useful to hand directly to an E&O insurer, underwriting partner, or lender who asks how Epic Title vets a vendor touching client data — and we're glad to complete a formal security questionnaire or NDA before the pilot begins.