

When there are multiple policies, follow these steps to place the endorsements directly after each policy on the Settlement Statement.

In our example, we are issuing one owner's and three loan policies.

Title Insurance Premiums (3)				
+ - Default Splits				
Loan	Underwriter	Commitment	Policy	Title Insurance Premium
1	Chicago Title Insurance Company	36261700098	OP: 36261700098 LP: 36261700098	OP: \$2,559.00 LP: \$513.00
2	Chicago Title Insurance Company	36261700098	LP:	LP: \$950.00
3	Chicago Title Insurance Company	36261700098	LP:	LP: \$825.00

1. Navigate to the **Options** screen
2. From the **Group endorsements** drop-down, select **Same Line As Parent Policy**

NOTE: You may also set the default sections for the **Owner's policies** and **All other title fees** on the Settlement Statement.

Options

☐ Include additional disbursements from broker's commission amount
☐ Print signatures on Order Balance Sheet

Title - CSS section defaults

Owner's policies: TITL - Title/Escrow Charges
All other title fees:
Group endorsements: Same Line As Parent Policy

3. Navigate to the **Title Insurance Premiums** screen
4. Highlight the first loan policy in the grid

Title Insurance Premiums			
Title Insurance Premiums (3)			
+ - Default Splits			
Loan	Underwriter	Commitment	Policy
1	Chicago Title Insurance Company	36261700098	OP: 36261700098 LP: 36261700098
2	Chicago Title Insurance Company	36261700098	LP:
3	Chicago Title Insurance Company	36261700098	LP:

5. Click the **Loan Policy Premium and Split** more/less bar
6. From the **Line** drop-down, select **Next Available (Title/Escrow Charges)**

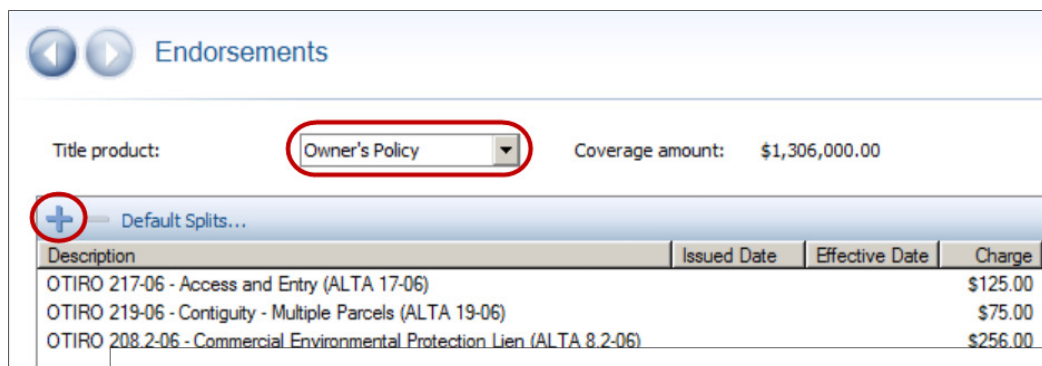
Loan Policy Premium and Split

Loan Policy Premium

Basis: Loan Amount Invoice: 1
Coverage amount: \$20,000.00 date: TP
Adjustment: +/-
Final loan premium: \$513.00 Additional Calculations...
Line: TITL.02 CSS Loan Policy Premium

7. Repeat **Steps 4-6** for each loan policy to be issued

8. Navigate to the **Endorsements** screen
9. From the **Title product** drop-down, select the **Owner's Policy**
10. Add the applicable owner's policy endorsements

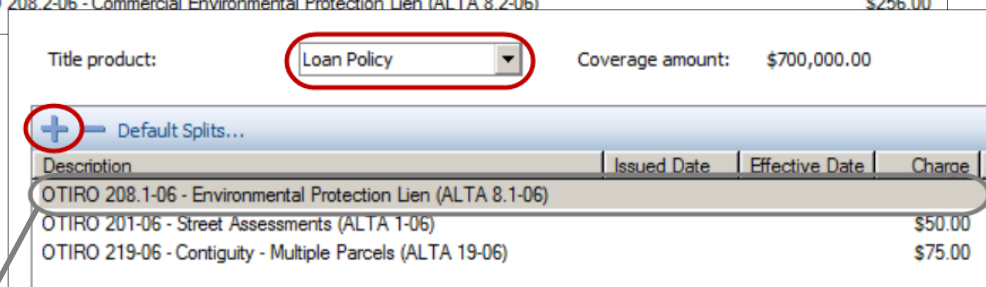


The screenshot shows the 'Endorsements' screen. At the top, 'Title product:' is set to 'Owner's Policy' (circled in red) with a 'Coverage amount' of '\$1,306,000.00'. Below this is a '+ Default Splits...' button (circled in red). A table lists endorsements:

Description	Issued Date	Effective Date	Charge
OTIRO 217-06 - Access and Entry (ALTA 17-06)			\$125.00
OTIRO 219-06 - Contiguity - Multiple Parcels (ALTA 19-06)			\$75.00
OTIRO 208.2-06 - Commercial Environmental Protection Lien (ALTA 8.2-06)			\$256.00

Once you add all Owner's Policy endorsements,

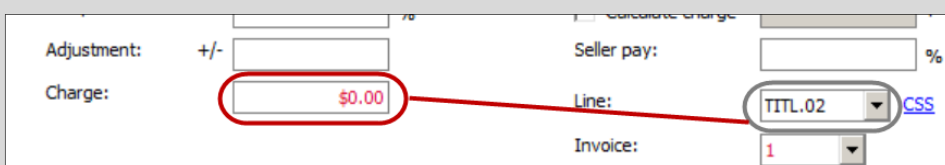
11. From the **Title product** drop-down, select the first **Loan Policy**
12. Add the applicable loan policy endorsements



The screenshot shows the 'Endorsements' screen for a 'Loan Policy' (circled in red) with a 'Coverage amount' of '\$700,000.00'. Below the '+ Default Splits...' button (circled in red), a table lists endorsements:

Description	Issued Date	Effective Date	Charge
OTIRO 208.1-06 - Environmental Protection Lien (ALTA 8.1-06)			
OTIRO 201-06 - Street Assessments (ALTA 1-06)			\$50.00
OTIRO 219-06 - Contiguity - Multiple Parcels (ALTA 19-06)			\$75.00

NOTE: If you add endorsements that have no charge and want them to display on the Settlement Sheet, in the **Charge** field, enter a 0.00. The **Line** number auto-populates.



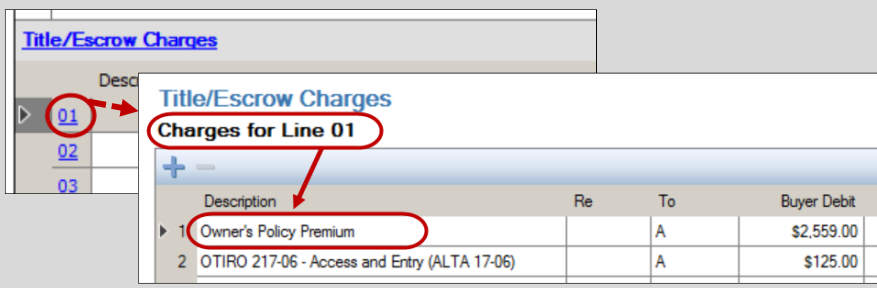
The screenshot shows the 'Charge' field with a value of '\$0.00' (circled in red). To the right, the 'Line' field is set to 'TITL.02' (circled in red) with a 'CSS' link. The 'Invoice' field is set to '1'.

13. Repeat **Steps 11-12** for all remaining loan policies
14. Navigate to the **Statement Charges** screen, **Title/Escrow Charges** section

Because the Endorsements are grouped with the Owner's and Loan Policy premiums behind the line, the **Description** fields are blank.

15. In the **Description** field of the first entry, enter the corresponding description (i.e., *Owner's Policy Premium*)

NOTE: If you are unsure which Line is assigned to which policy, click the **Line** number link to verify.



The screenshot shows the 'Title/Escrow Charges' screen. On the left, a table lists lines 01, 02, and 03. Line 01 is selected (circled in red). To the right, a table titled 'Charges for Line 01' shows the following entries:

Description	Re	To	Buyer Debit
Owner's Policy Premium		A	\$2,559.00
OTIRO 217-06 - Access and Entry (ALTA 17-06)		A	\$125.00

16. Check the **Itemize** check box

Statement Charges									
<Click here to add a row>									
Title/Escrow Charges						\$5,628.00	\$0.00	\$0.00	\$0.00
Description	Re	To	Name	C/D	Buyer Debit	Buyer Credit	Seller Debit	Seller Credit	Itemize
01 Owner's Policy Premium				<input type="checkbox"/>	\$3,015.00				<input checked="" type="checkbox"/>
02 Loan #1 Policy Premium				<input type="checkbox"/>	\$638.00				<input checked="" type="checkbox"/>
03 Loan #2 Policy Premium				<input type="checkbox"/>	\$1,075.00				<input checked="" type="checkbox"/>
04 Loan #3 Policy Premium				<input type="checkbox"/>	\$900.00				<input checked="" type="checkbox"/>

17. Repeat **Steps 15-16** for each policy, entering the applicable description (i.e., Loan Policy Premium)

The Settlement Statement displays the Policies followed by the applicable Endorsements.

Statement Charges			
<Click here to add a row>			
Title/Escrow Charges			
Description	Re	To	N
01 Owner's Policy Premium			
02 Loan #1 Policy Premium			
03 Loan #2 Policy Premium			
04 Loan #3 Policy Premium			

Title/Escrow Charges	
Owner's Policy Premium	2,559.00
OTIRO 217-06 - Access and Entry (ALTA 17-06)	125.00
OTIRO 219-06 - Contiguity - Multiple Parcels (ALTA 19-06)	75.00
OTIRO 208.2-06 - Commercial Environmental Protection Lien (ALTA 8.2-06)	256.00
Loan Policy Premium	513.00
OTIRO 201-06 - Street Assessments (ALTA 1-06)	50.00
OTIRO 219-06 - Contiguity - Multiple Parcels (ALTA 19-06)	75.00
OTIRO 208.1-06 - Environmental Protection Lien (ALTA 8.1-06)	
Loan Policy Premium	950.00
OTIRO 201-06 - Street Assessments (ALTA 1-06)	50.00
OTIRO 219-06 - Contiguity - Multiple Parcels (ALTA 19-06)	75.00
OTIRO 208.1-06 - Environmental Protection Lien (ALTA 8.1-06)	
Loan Policy Premium	825.00
OTIRO 219-06 - Contiguity - Multiple Parcels (ALTA 19-06)	75.00
OTIRO 208.1-06 - Environmental Protection Lien (ALTA 8.1-06)	
OTIRO 201-06 - Street Assessments (ALTA 1-06)	50.00