The following process is provided to bring existing orders into compliance as it pertains to identifying the approved Title Insurance Underwriter with the Fannie Mae adoption of Form 4650. Refer to **Underwriting Bulletin 2025 – National – 04** if more information is desired.

Refer to the applicable process if your existing order shows,

- Funds not receipted
- Funds receipted

Existing Open Order without Funds Receipted

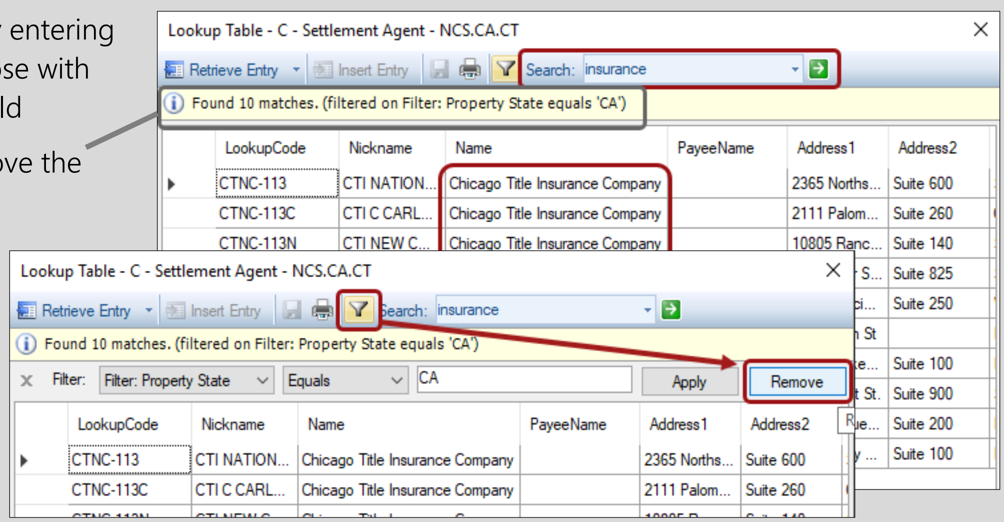
1. Navigate to the Order Contacts screen
2. Update the Revenue Contacts to by re-selecting the entry showing **Insurance Company** in the **Name** (e.g., Chicago Title Company to Chicago Title Insurance Company)
   a. **Settlement Agent**
   b. **Title Insurance Company**

NOTE: When re-pulling the Contact from the Lookup Table you are not finding the corresponding entry,

1. Use the **Search** feature by entering *insurance* to view only those with insurance in the **Name** field

If the entry is still not found, remove the State **Filter.**

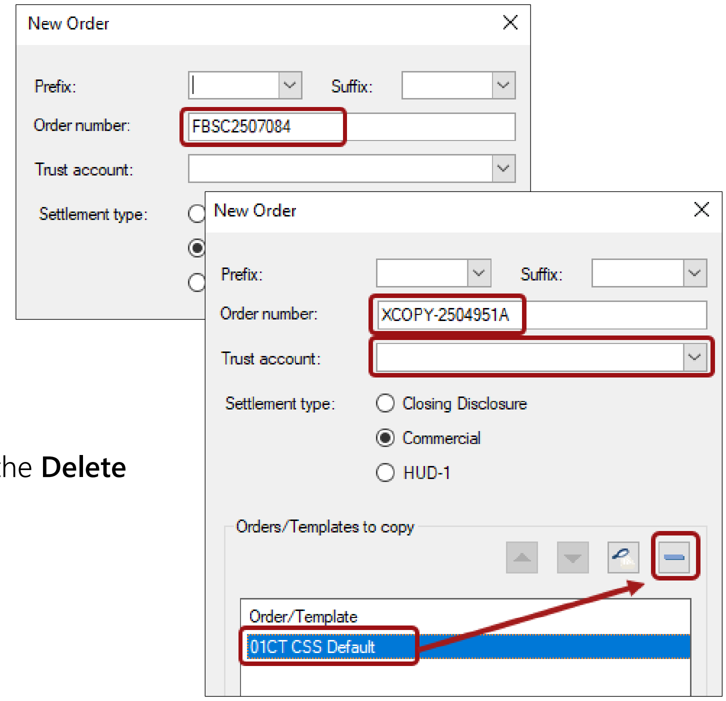
1. Click the **Filter** icon
2. Click the **Remove** button



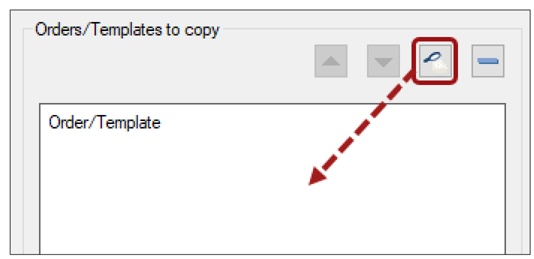
3. Contact Accounting to request the Trust Account be changed to that authorized for handling the Insurance Company orders.

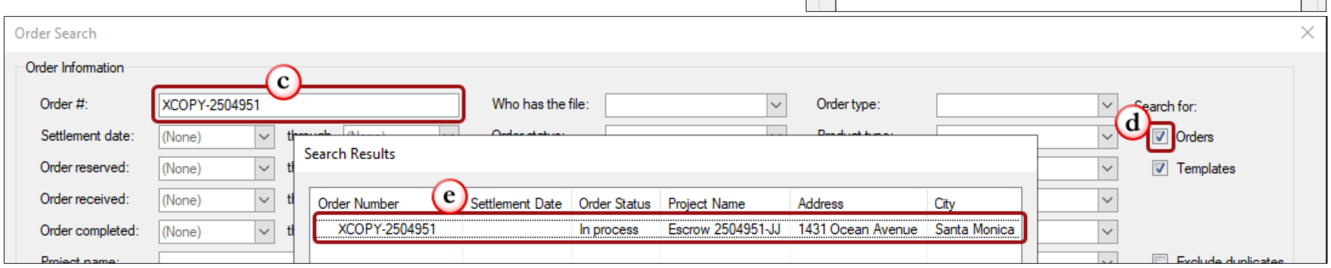
Existing Open Order with Funds Receipted

1. In the existing order, press **CTRL + ALT + G** to copy the order number; **Close** the order
2. **Create** a new order
3. In the **Order number** field, highlight the system generated number and press **CTRL + V** to paste the original order number
4. Append the copied order number with an **A**
5. Select the **Trust account** authorized to handle the selected Insurance Company orders

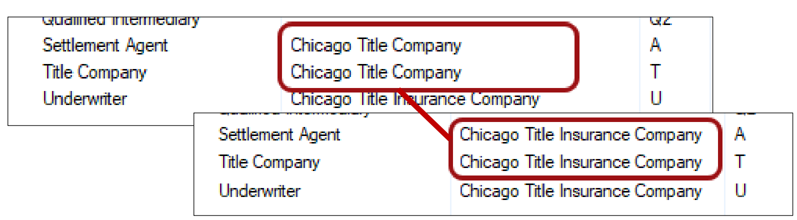


6. Apply the **Order/Templates to copy**
   » Select the existing template(s) shown; press the **Delete** icon
   » Click the **Search** icon
   » In the **Order #** field, enter the original order number
   » Check the **Order** check box (to the right); press the **Enter** key
   » Double-click the order

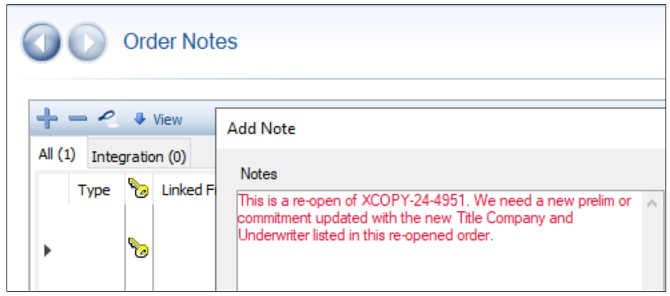




7. Click the **OK** button to open the order
8. Update the Revenue Contacts to by re-selecting the entry showing **Insurance Company** in the **Name** (e.g., Chicago Title Company to Chicago Title Insurance Company)
   » **Settlement Agent**
   » **Title Insurance Company**



9. Click the **Notes** button
10. Add a note: **This is a re-open of [enter original order #]. We need a new prelim or commitment updated with the new Title Company and Underwriter listed in this re-opened order.**



11. **Publish** the **Open Order Sheet** as usual
12. If published documents exist in Smartview,

    » open a ServiceNow ticket for Smartview to have the documents transferred to the **A**-file

    -Or-

    » you can transfer documents yourself; refer to the Smartview job aid, Copy Documents – Single Order

13. To transfer funds to the **A**-file, refer to the Funds - File-to-File Transfer - CSS to CSS Order job aid