

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**


Unassigned intermediary		
Settlement Agent	Chicago Title Company	A
Title Company	Chicago Title Company	T
Underwriter	Chicago Title Insurance Company	U

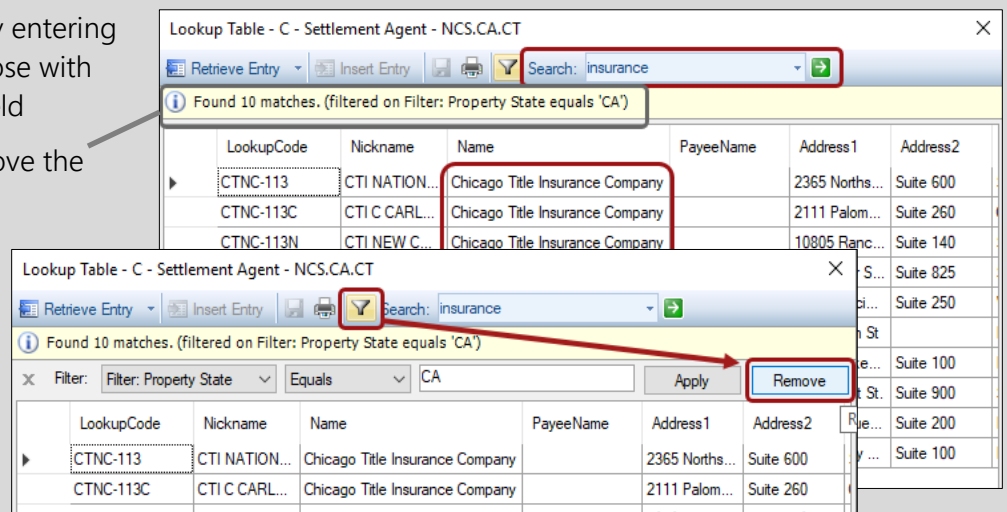
Settlement Agent	Chicago Title Insurance Company	A
Title Company	Chicago Title Insurance Company	T
Underwriter	Chicago Title Insurance Company	U

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



LookupCode	Nickname	Name	PayeeName	Address1	Address2
CTNC-113	CTI NATION...	Chicago Title Insurance Company		2365 Norths...	Suite 600
CTNC-113C	CTI C CARL...	Chicago Title Insurance Company		2111 Palom...	Suite 260
CTNC-113N	CTI NEW C...	Chicago Title Insurance Company		10805 Ranc...	Suite 140

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

Existing Open Order with Funds Received

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**

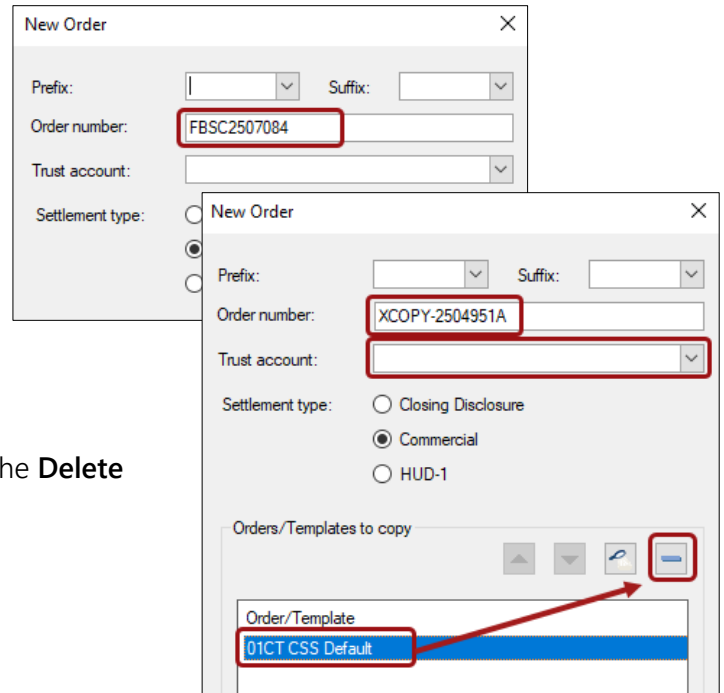
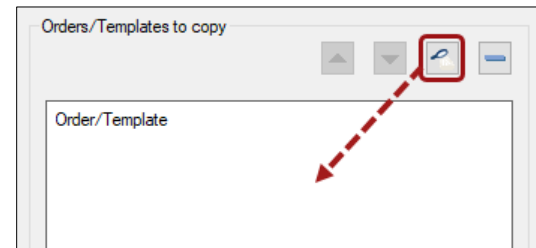
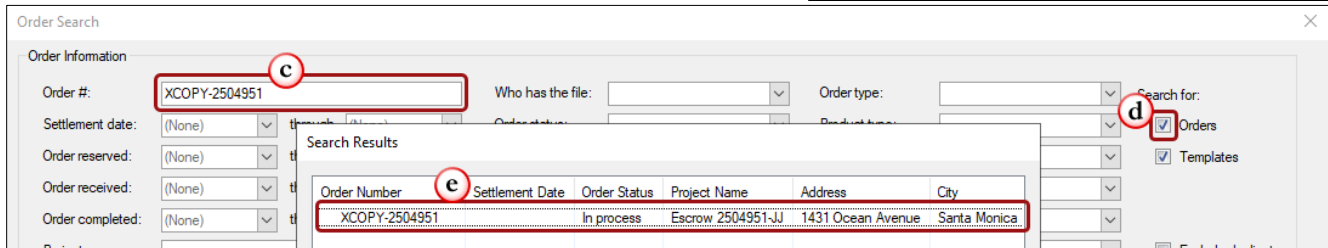


» Click the **Search**  icon

» 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

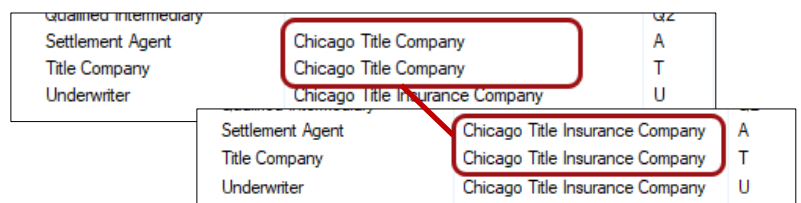
Order Number	Settlement Date	Order Status	Project Name	Address	City
XCOPY-2504951		In process	Escrow 2504951-JJ	1431 Ocean Avenue	Santa Monica

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**

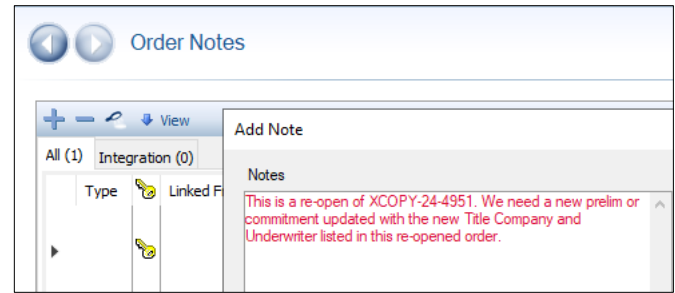
» **Title Insurance Company**



Revenue Contact	Role
Guaranteed Intermediary	GZ
Settlement Agent	A
Title Company	T
Underwriter	U

Updating Existing Orders

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