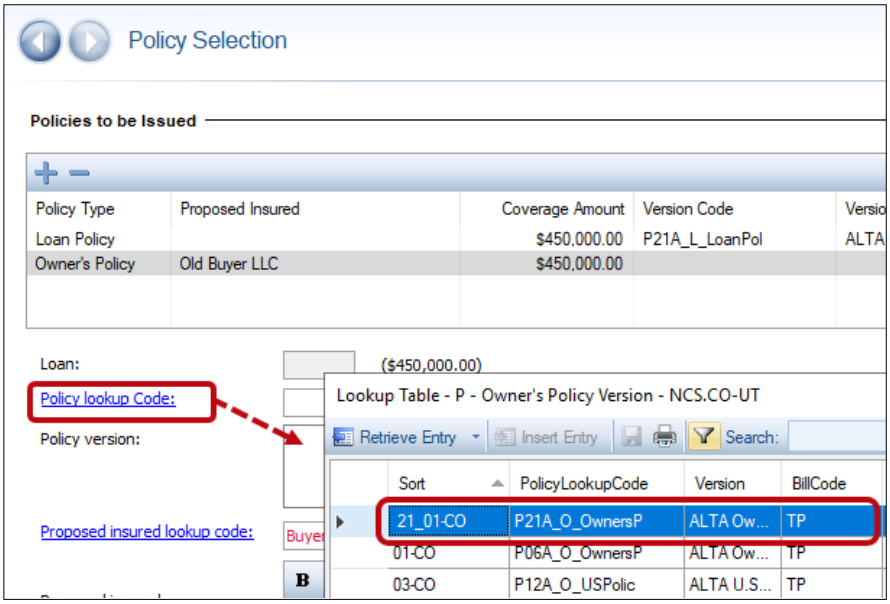
COMMERCIAL: HOLD OPENS – CO-UT – NCS FNT

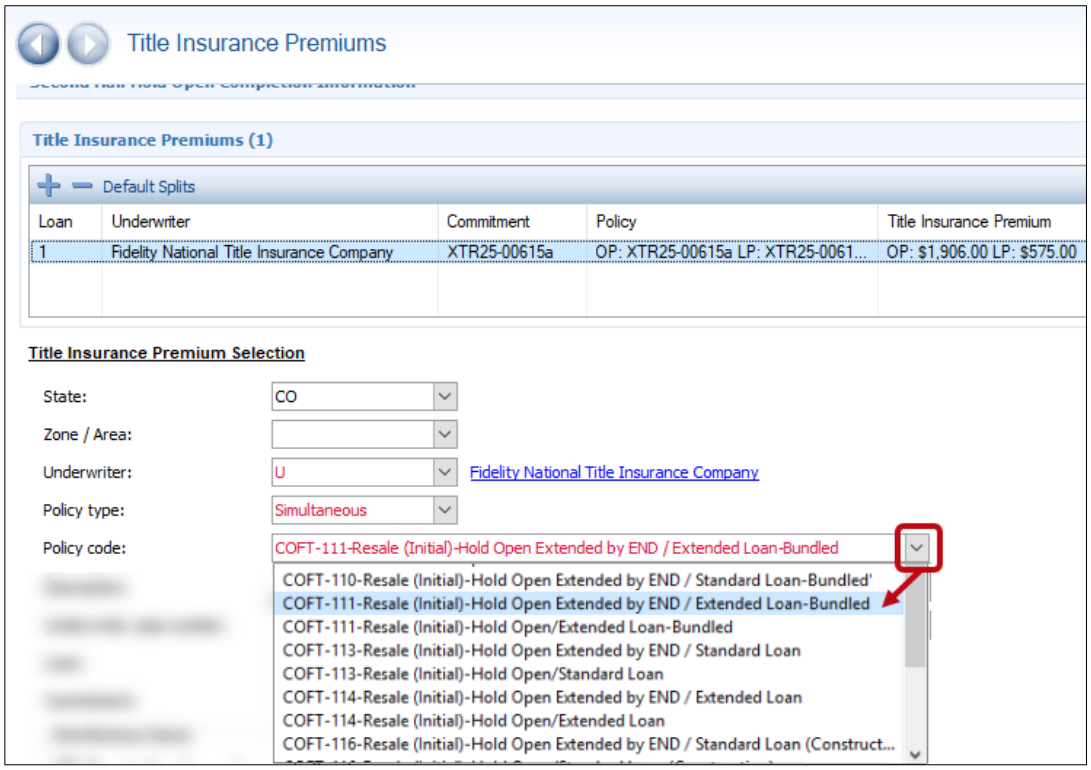
Preparing the Initial Purchase Transaction

Follow these steps to add the required policies, endorsements and verify the rates for the initial (part 1) of the purchase transaction.

1. Navigate to the **Policy Selection** screen
2. Highlight the **Owner's Policy** in the grid
3. Click the **Policy lookup code** link to select one of the Standard Owner's Policies



4. Navigate to the **Title Insurance Premiums** screen
5. Highlight the Owner's Policy in the grid
6. From the **Policy code** drop-down, select the applicable **Resale (Initial) – Hold Open** entry



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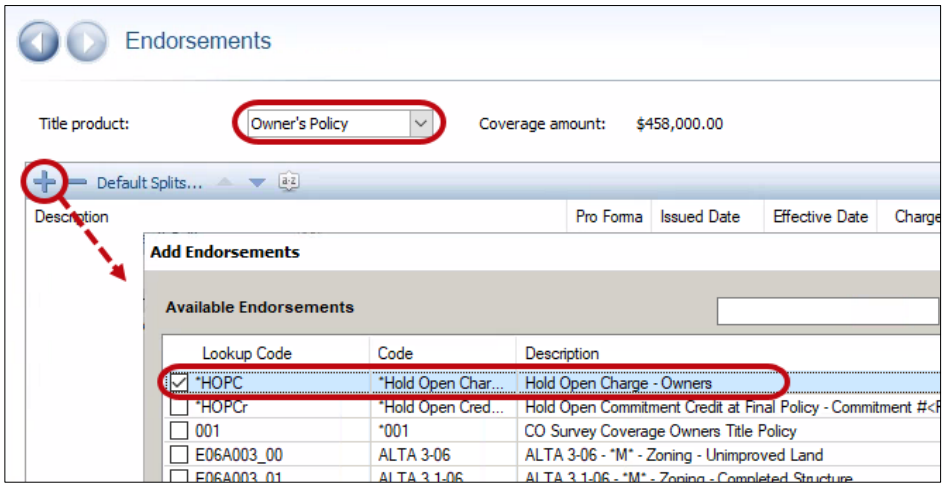
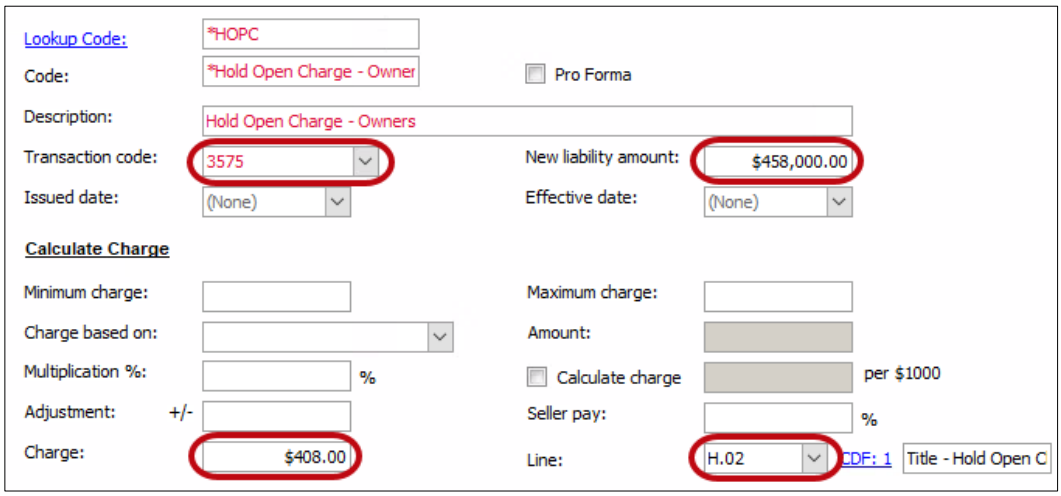
7. Navigate to the **Endorsements** screen
8. Add the applicable endorsement(s)
   - Verify the **Title product** = **Owner's Policy**; select if needed
   - Click the **Add Endorsements** icon
   - Select the ***Hold Open Charge - Owners** endorsement; click **OK**



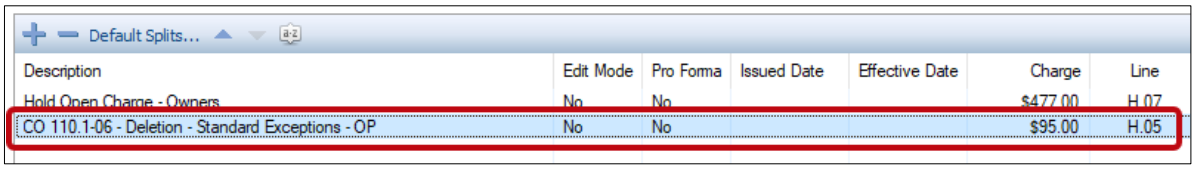
Once the endorsement is added, the following fields are populated for you.

- **Transaction code**
- **New liability amount**
- **Charge**
- **Line**



If issuing Extended Owner's Policy (as shown by selecting the "Extended by END" in step 6),

9. Add the applicable endorsement: **CO 110.1-06 Deletion – Standard Exceptions - OP**



10. Verify the **Charge**; this is credited in part 2 of the transaction

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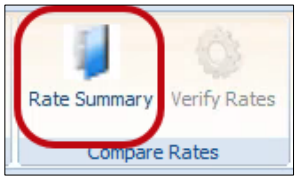
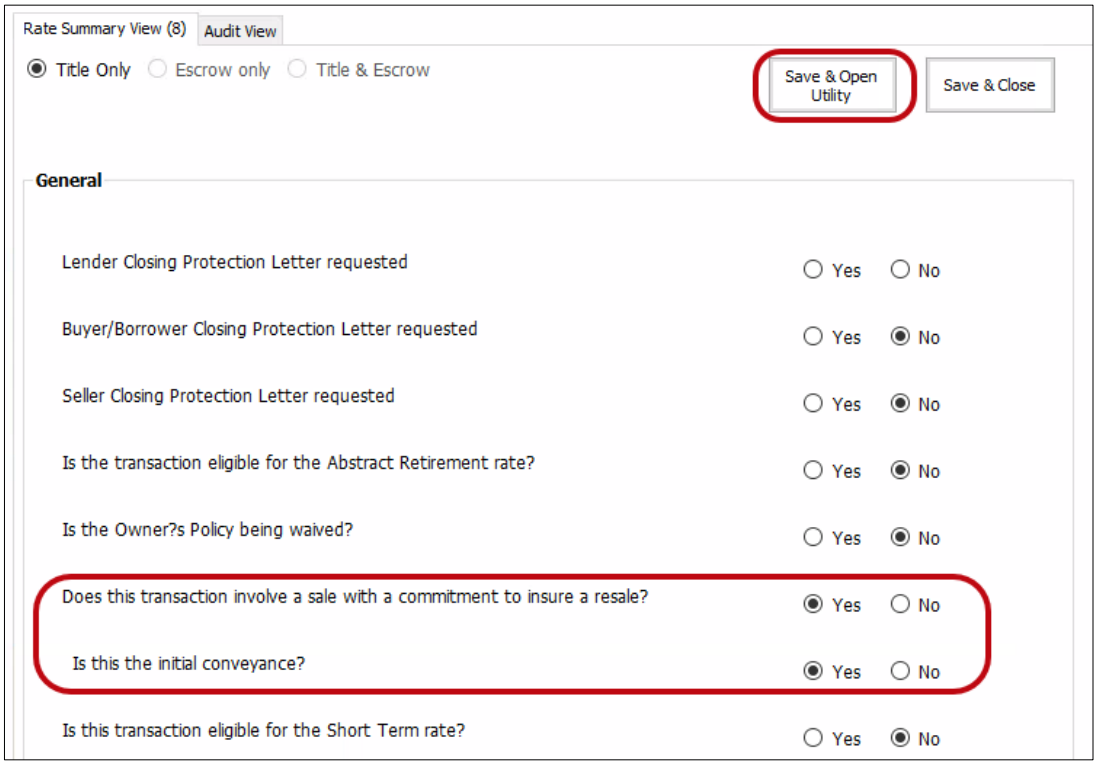
From the **Order** ribbon,

11. Click the **Rate Summary** button

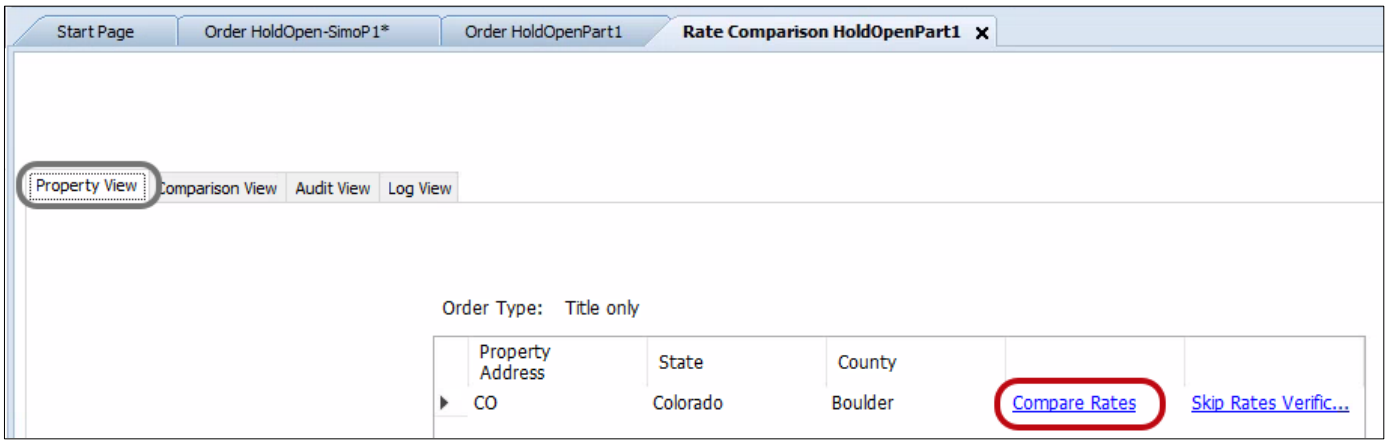


The resale questions default to **Yes** for you on the **Rate Summary View** tab.

12. Click the **Save & Open Utility** button to run the comparison



13. When the **Property View** tab opens, click the **Compare Rates** link



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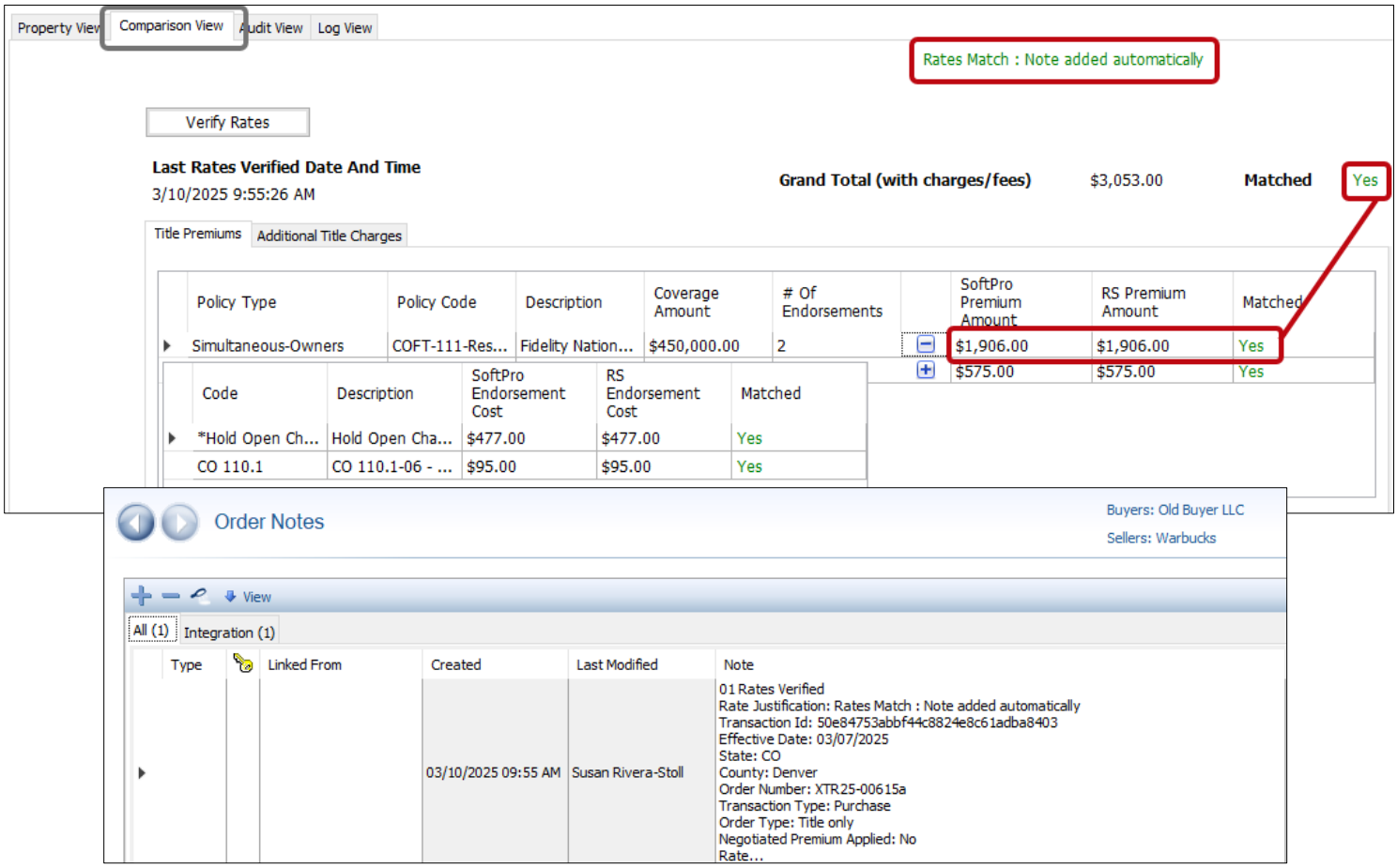
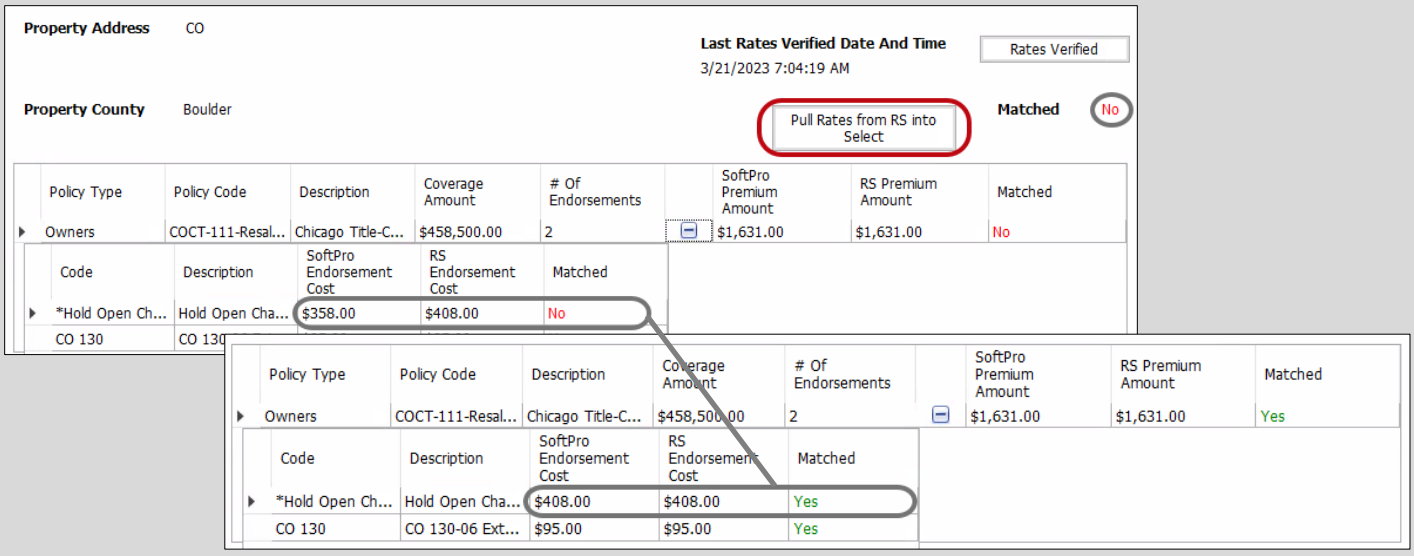
The **Comparison View** tab shows the rates match the response from Rate Services and records the information on the **Notes** screen.



NOTE: If the rates **do not match**, click the **Pull Rates from RS into Select** button. Your Select order then aligns with Rate Services and pulls the results into your order.



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