

Adding Multiple Loan Policies

When the UCC Plus invoice identifies multiple loan premiums, follow these steps to enter the additional policies/premiums in your order.

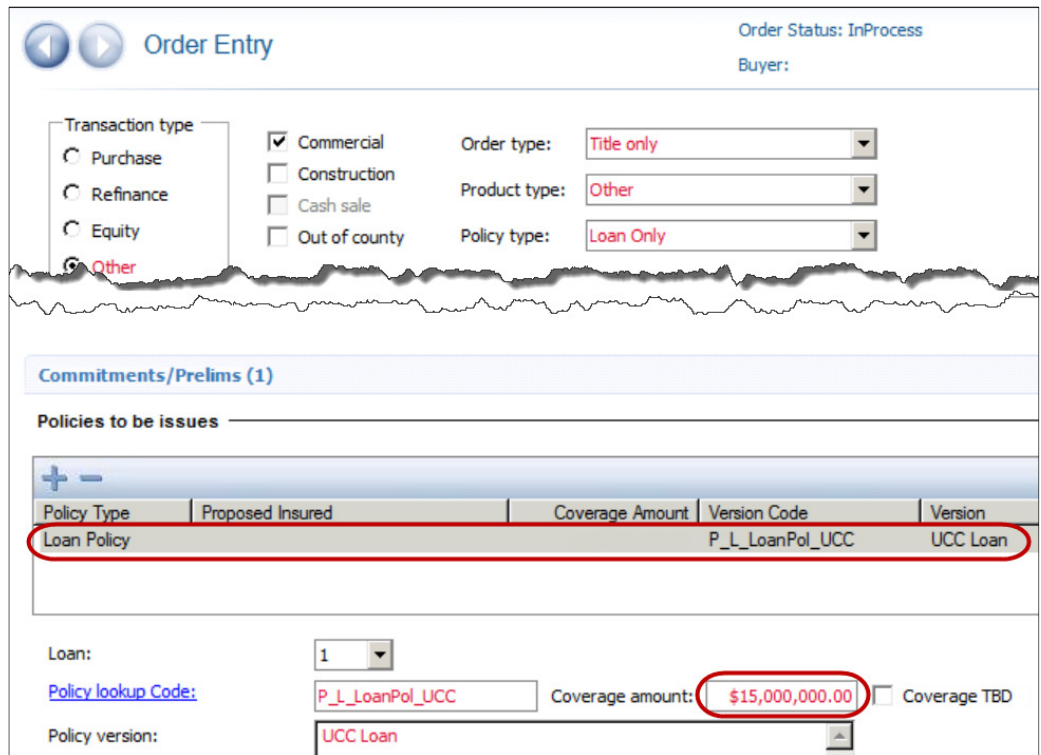
NOTE: This process can be used when the transaction requires multiple Owner's Policies; select or enter the Owners policy and premium as needed.

1. Open the order following your normal process; applying the template applicable to your transaction
2. Run the appropriate speed code

Adding the Loan Policies

From the **Order Entry** screen,

3. In the **Policies to be issued** grid, highlight the **Loan Policy**
4. In the **Coverage amount** field, enter the coverage amount of your first policy



Order Entry

Order Status: InProcess
Buyer:

Transaction type:
☐ Purchase
☐ Refinance
☐ Equity
☒ Other

☒ Commercial
☐ Construction
☐ Cash sale
☐ Out of county

Order type: Title only
Product type: Other
Policy type: Loan Only


Commitments/Prelims (1)

Policies to be issues

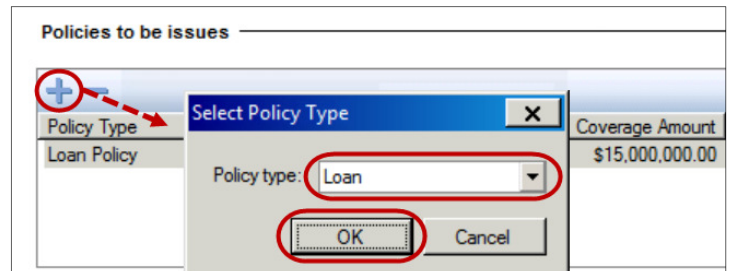
Policy Type	Proposed Insured	Coverage Amount	Version Code	Version
Loan Policy			P_L_LoanPol_UCC	UCC Loan

Loan: 1
Policy lookup Code: P_L_LoanPol_UCC
Policy version: UCC Loan

Coverage amount: \$15,000,000.00 ☐ Coverage TBD

5. Click the **Add Policy**  icon
6. From the **Policy type** drop-down, select **Loan**; click **OK**

NOTE: If multiple Owner's Policies, select **Owners** from the **Policy type** drop-down.



Policies to be issues

Policy Type: Loan Policy

Select Policy Type

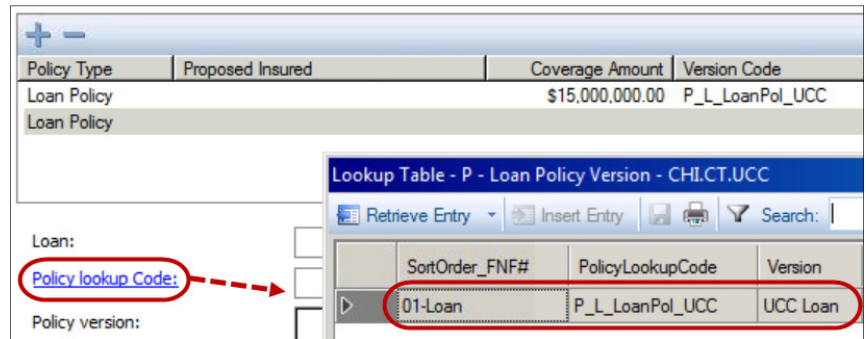
Policy type: Loan

OK Cancel

Coverage Amount: \$15,000,000.00

Adding Multiple Loan Policies

7. Click the **Policy lookup Code** link
8. Double-click the **01-Loan** policy entry



Policy Type | Proposed Insured | Coverage Amount | Version Code

Loan Policy		\$15,000,000.00	P_L_LoanPol_UCC
Loan Policy			

Loan:

Policy lookup Code:

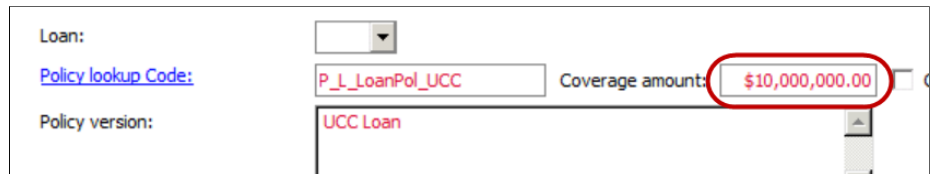
Policy version:

Lookup Table - P - Loan Policy Version - CHI.CT.UCC

Retrieve Entry | Insert Entry | Search:

SortOrder_FNF#	PolicyLookupCode	Version
01-Loan	P_L_LoanPol_UCC	UCC Loan

9. In the **Coverage amount** field, enter the coverage amount of your second policy



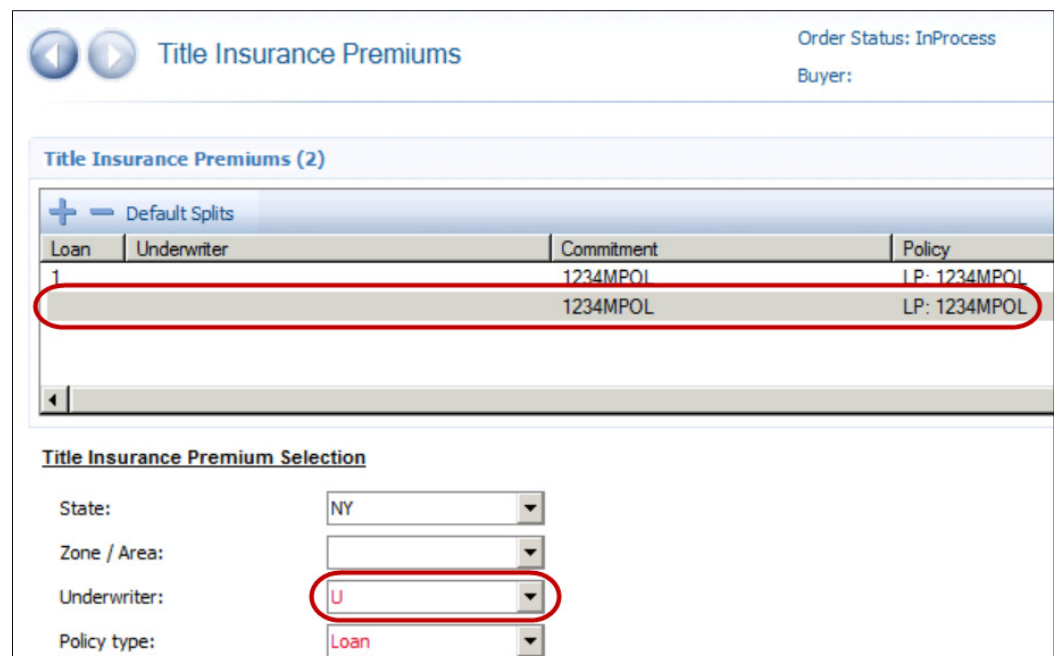
Loan:

Policy lookup Code:

Policy version:

Coverage amount:

10. Navigate to the **Title Insurance Premiums** screen
11. Highlight the second loan in the grid
12. From the **Underwriter** drop-down, select the **U-Contact**



Order Status: InProcess

Buyer:

Title Insurance Premiums (2)

Default Splits

Loan	Underwriter	Commitment	Policy
1		1234MPOL	LP: 1234MPOL
		1234MPOL	LP: 1234MPOL

Title Insurance Premium Selection

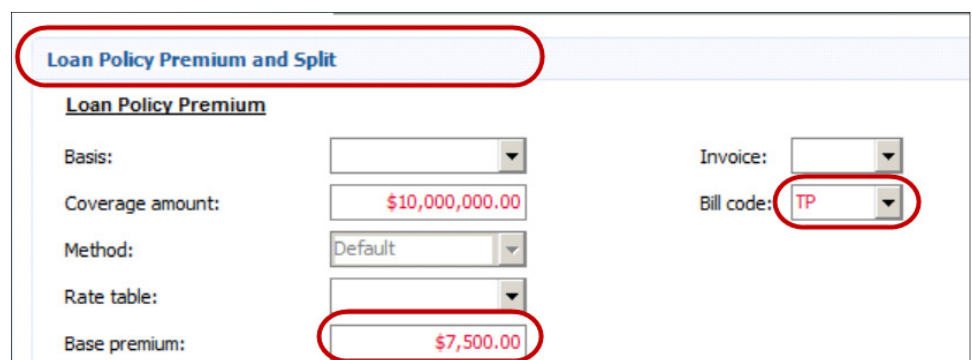
State:

Zone / Area:

Underwriter:

Policy type:

13. Click the **Loan Policy Premium and Split** more/less bar
14. Verify or enter the,
 - a) **Base premium** = the second loan premium cited on the invoice
 - b) **Bill code** = TP



Loan Policy Premium and Split

Loan Policy Premium

Basis:

Coverage amount:

Method:

Rate table:

Base premium:

Invoice:

Bill code:

Adding Multiple Loan Policies


- c) **Line** = select a **TITL.##**
line



Adjustment:	+/-		
Final loan premium:		\$7,500.00	<input type="checkbox"/> Taxable Additional Calculations...
Line:		TITL.01	CSS Loan Policy Premium

Adding Additional Title Charges

1. Navigate to the **Additional Title Charges** screen
2. In the **1st Loan Premium** field, enter the first loan premium cited on the invoice
3. Highlight the applicable placeholder in the grid
4. If entering an **Endorsement** fee, from the **Policy** drop-down, select **Loan Policy** (or **Owners Policy**, depending upon the endorsement selection)

NOTE: If you need to add a charge line that is not already listed,

- a. Click the **Add Additional Charge**  icon
- b. Click the **Description** link (below the grid) to select from the **Lookup Table**
- c. Continue to **Step 5**



Additional Title Charges
Order Stat
Buyer:

Owner's Premium:
1st Loan Premium:

Description	Charge	Issued Date	Effective Date
Recording Filing Fee			
Search			
Work Fee			
UCC - Mezzanine Endorsement			
UCC - Tracking Endorsement			
Service Fee Expense - 3rd Party			
Service Fee Income - 3rd Party			
Revenue Sharing Expense			
Revenue Sharing Income			

Policy:
Coverage amount: \$15,500,000.00
[Description:](#) **Recording Filing Fee**
Transaction code:
Issued date:

Multiplication %: %
Adjustment: +/-
Charge: ☐ Taxable
☐ Calculate charge
Seller pay:
Line: **TITL.01**
Invoice: **1**
Bill code: **RSR**

5. In the **Charge** field, enter the amount
6. Repeat **Steps 3-5** until all charges have been entered
7. Continue processing and/or disbursing your order following your operation's procedures