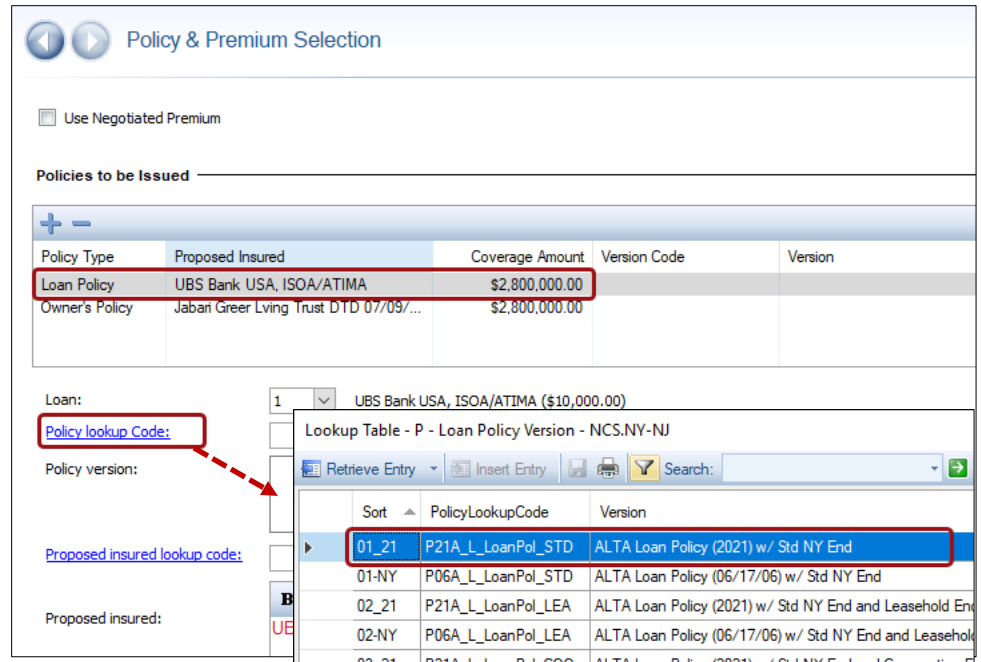


Follow these steps to update the defaulted Policy Codes and subsequent Transaction Codes to ensure revenue can be posted by Accounting.

1. Navigate to the **Policy & Premium Selection** screen
2. With the policy highlighted in the **Policies to be Issued** grid, click the **Policy lookup Code** link
3. Double-click the applicable policy entry
4. Repeat **steps 2-3** for each policy shown in the grid



**Policy & Premium Selection**

☐ Use Negotiated Premium

**Policies to be Issued**

Policy Type	Proposed Insured	Coverage Amount	Version Code	Version
Loan Policy	UBS Bank USA, ISOA/ATIMA	\$2,800,000.00		
Owner's Policy	Jabari Greer Living Trust DTD 07/09/...	\$2,800,000.00		

Loan: 1 UBS Bank USA, ISOA/ATIMA (\$10,000.00)

[Policy lookup Code:](#)

Policy version:

[Proposed insured lookup code:](#)

Proposed insured:

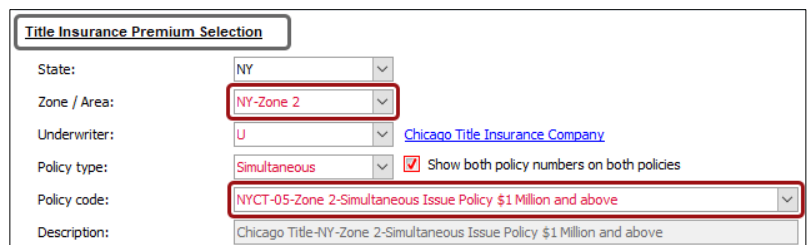
**Lookup Table - P - Loan Policy Version - NCS.NY-NJ**

Retrieve Entry Insert Entry Search:

Sort	PolicyLookupCode	Version
01_21	P21A_L_LoanPol_STD	ALTA Loan Policy (2021) w/ Std NY End
01-NY	P06A_L_LoanPol_STD	ALTA Loan Policy (06/17/06) w/ Std NY End
02_21	P21A_L_LoanPol_LEA	ALTA Loan Policy (2021) w/ Std NY End and Leasehold End
02-NY	P06A_L_LoanPol_LEA	ALTA Loan Policy (06/17/06) w/ Std NY End and Leasehold End
03_21	P21A_L_LoanPol_COG	ALTA Loan Policy (2021) w/ Std NY End and Cooperative End

In the **Title Insurance Premium Selection** section,

5. Select from the respective drop-down,
  - a) **Zone**
  - b) **Policy code**



**Title Insurance Premium Selection**

State: NY

Zone / Area: NY-Zone 2

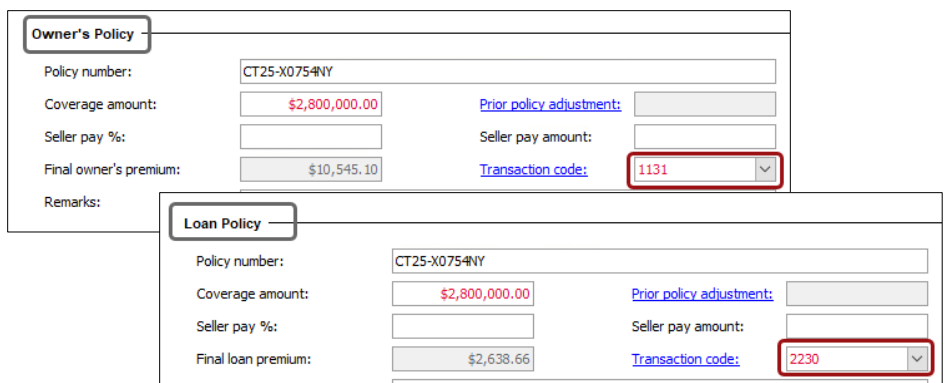
Underwriter: U Chicago Title Insurance Company

Policy type: Simultaneous ☒ Show both policy numbers on both policies

Policy code: NYCT-05-Zone 2-Simultaneous Issue Policy \$1 Million and above

Description: Chicago Title-NY-Zone 2-Simultaneous Issue Policy \$1 Million and above

6. Select the **Transaction code** as needed for the,
  - a) **Owner's Policy**
  - b) **Loan Policy**



**Owner's Policy**

Policy number: CT25-X0754NY

Coverage amount: \$2,800,000.00 Prior policy adjustment:

Seller pay %: 10.545.10 Seller pay amount:

Final owner's premium: \$10,545.10 Transaction code: 1131

Remarks:

**Loan Policy**

Policy number: CT25-X0754NY

Coverage amount: \$2,800,000.00 Prior policy adjustment:

Seller pay %: 2,638.66 Seller pay amount:

Final loan premium: \$2,638.66 Transaction code: 2230