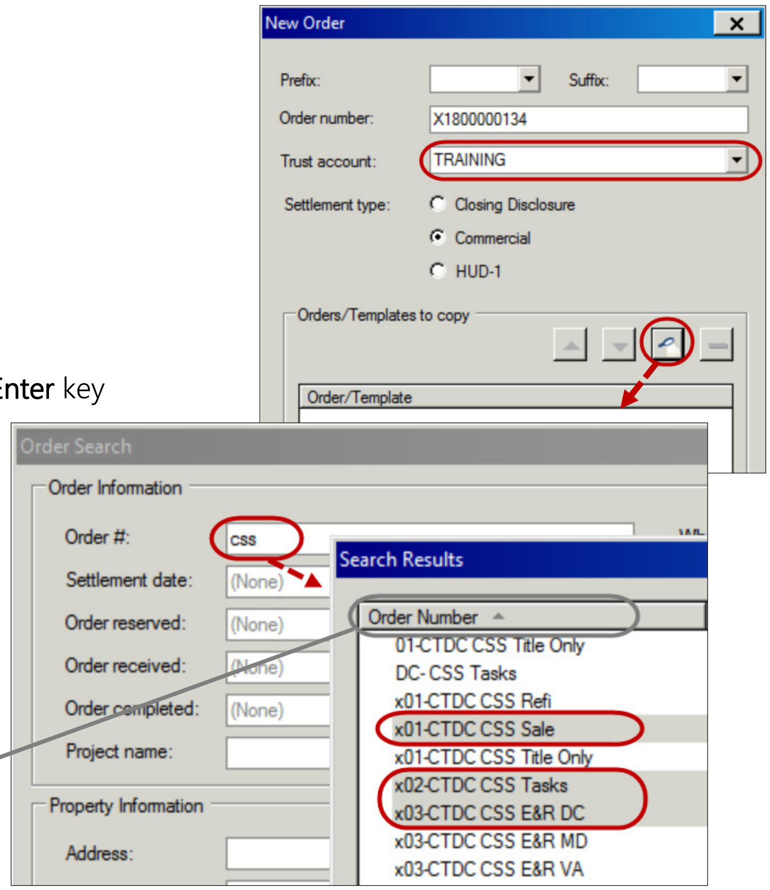
Processing a Title Only Order

Follow the steps in the corresponding section to process your Title Only order.

Creating the Order

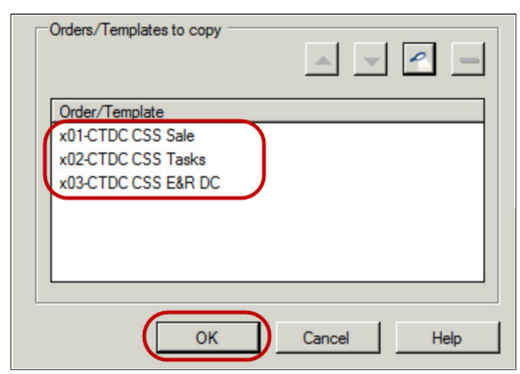
1. Create a new order
2. Select the **Trust account**
3. Apply templates
   a) Click the **Search** icon



   b) In the **Order #** field, enter *CSS*; press the **Enter** key
   c) Highlight the appropriate **01-CTDC CSS** template (i.e., **Sale, Refi**)
   d) Holding the **Ctrl** key, highlight the
      » **02-CTDC CSS Tasks** template
      » **03-CTDC CSS E&R** [*state*] template

HINT: Click the **Order Number** column header to sort the templates in alphabetical order.

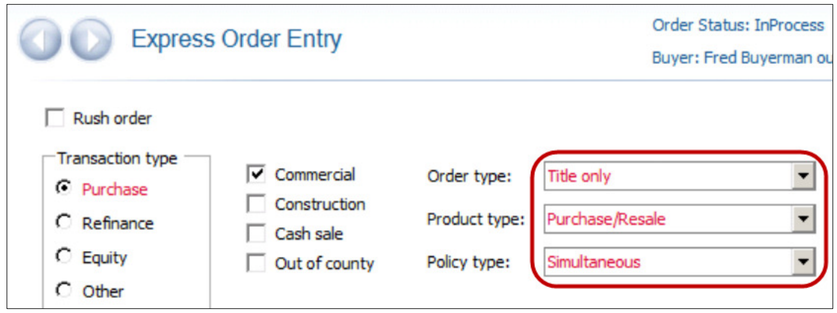
4. Click the **OK** button
5. Click the **OK** button to generate the order



Entering Order Details

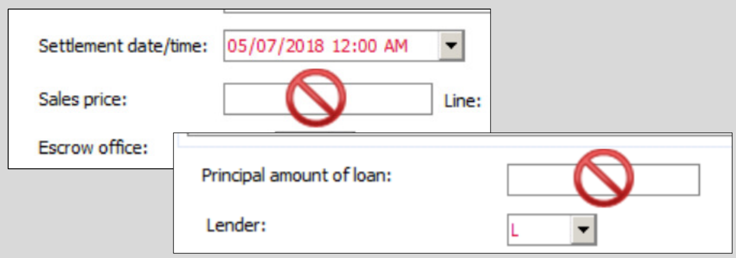
On the **Express Order Entry** screen,

6. From the **Order type** drop-down, select **Title only**
7. Verify the **Product type** and **Policy type**; change if needed



8. Select the **Escrow officer/Closer**; this allows the EO to receive wire notifications
9. Select the **Pre-closer/Escrow assistant** (if applicable)
10. Select the **Title officer/Examiner**
11. Enter or select, the **Settlement date** (if known)

NOTE: Do **not** enter the **Sales price** or **Principal amount of loan**. Coverage amounts are entered on the **Policy Selection** screen in a later step.



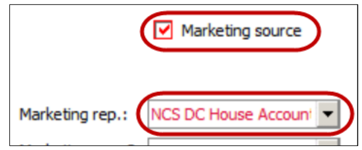
12. Enter the **Property address**; entering the **Zip Code** populates the **City, State** and **County** fields; you can also click the **City** link to pull the same information if the Zip Code is not known

Entering Contacts

13. Navigate to the **Order Contacts** screen
14. Enter or verify the,
    - **E**-Escrow Company; this is your Customer
    - **A**-Settlement Agent = your local office
    - **O2**-Other = auto-populates with **Simplifile** information; if you are using a different e-recording service, click the **Lookup code** link to select

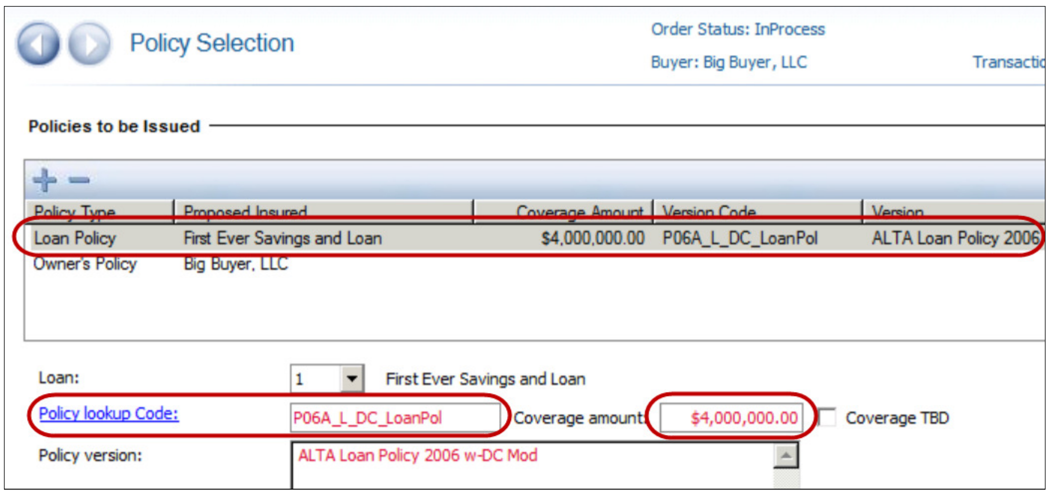
- T-Title Company = auto-populates with the **A**-Contact
- T2-Title Company = auto-populates with the **E**-Escrow Company Contact
- U-Underwriter = the Customer's requested Underwriter; if the Underwriter changes, you must change the **A**- and **T**-Contacts to match

15. Enter all remaining Contacts using placeholders first; when entering the Contact that gave you the order, check the **Marketing source** check box and select the **Marketing Rep** (sales rep)

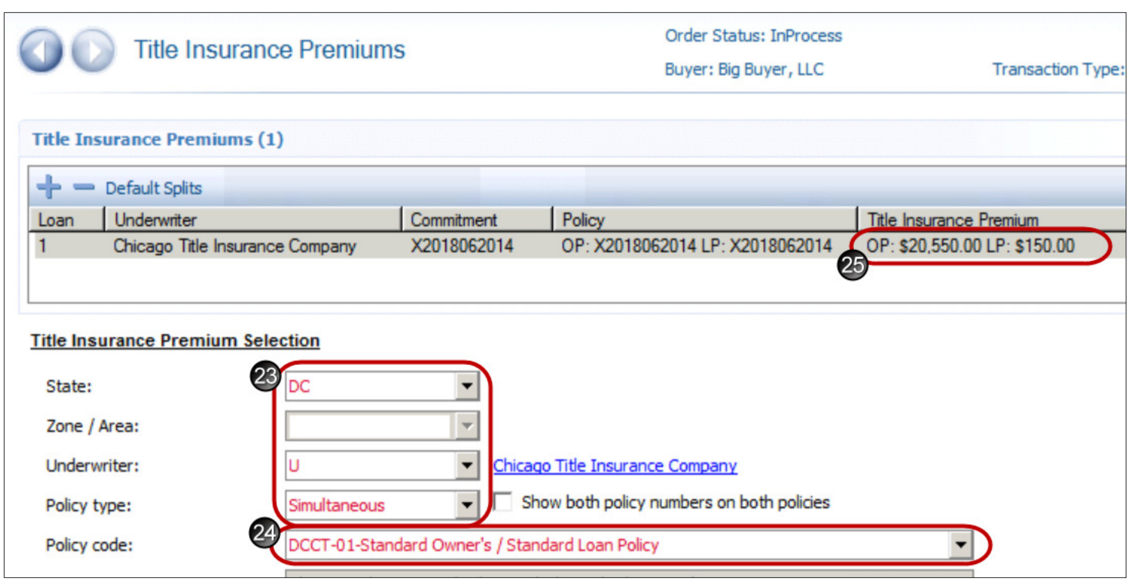


Calculating Premiums

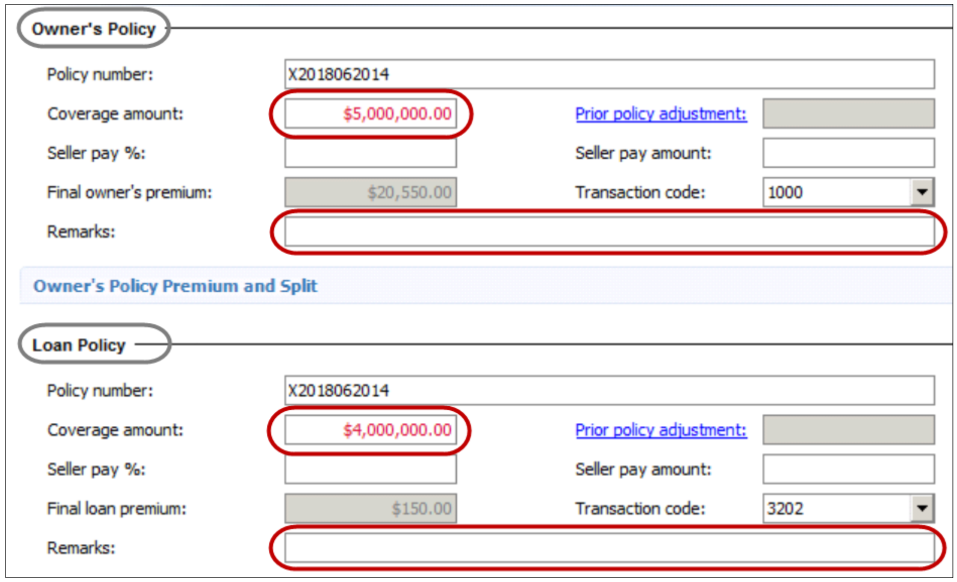
16. Navigate to the **Policy Selection** screen
17. Highlight the first policy in the grid
18. Click the **Policy lookup Code**
19. Double-click the applicable policy to select
20. Enter the **Coverage amount**
21. Repeat for each remaining policy in the grid



22. Navigate to the **Title Insurance Premiums** screen
23. Verify the,
    - **State**
    - **Underwriter**
    - **Policy type**
24. From the **Policy code** drop-down, select the applicable policy
25. Verify the premium calculation (in the grid)

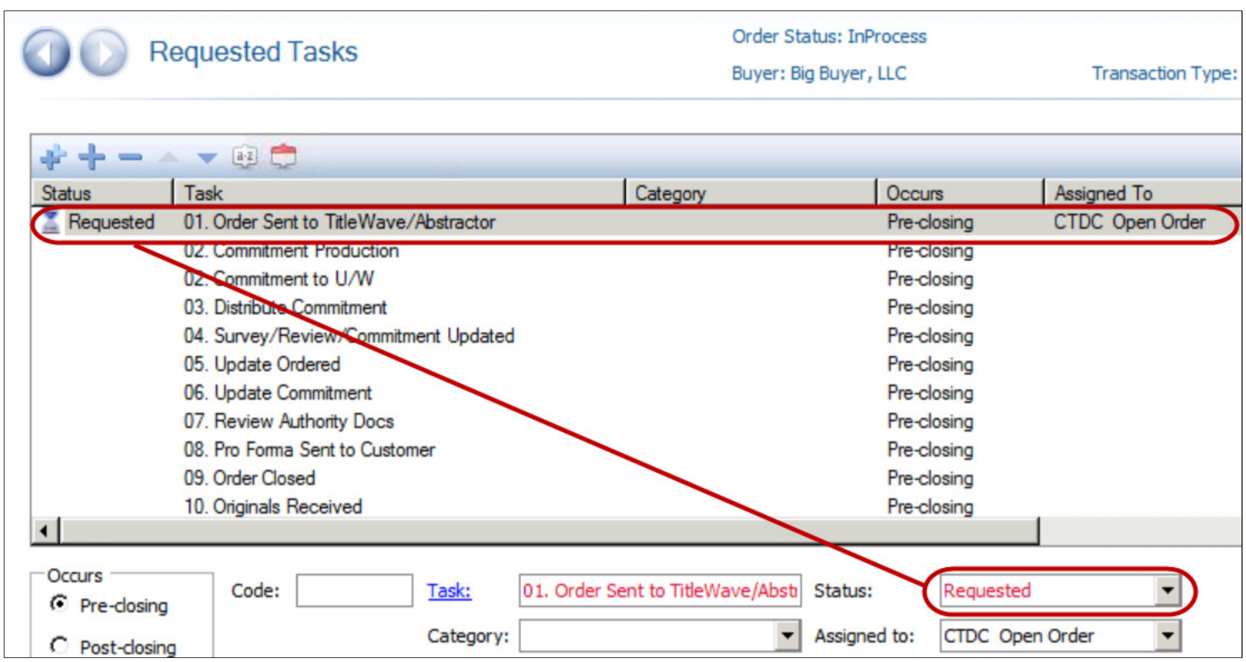


26. Verify the **Coverage amount** is populated in the **Owner's Policy** and **Loan Policy** sections
27. Check the **Remarks** field for any prior policy adjustment comments



Completing the Open Order Process

28. Click the **Documents** button
29. **Publish** the **Open Order Sheet (Order Summary) with Notes** to smartVIEW
30. Order your search
31. Click the **Requested Tasks** button
32. Highlight the **01.Order Sent to TitleWave/Abstractor** task
33. From the **Status** drop-down, select **Requested**

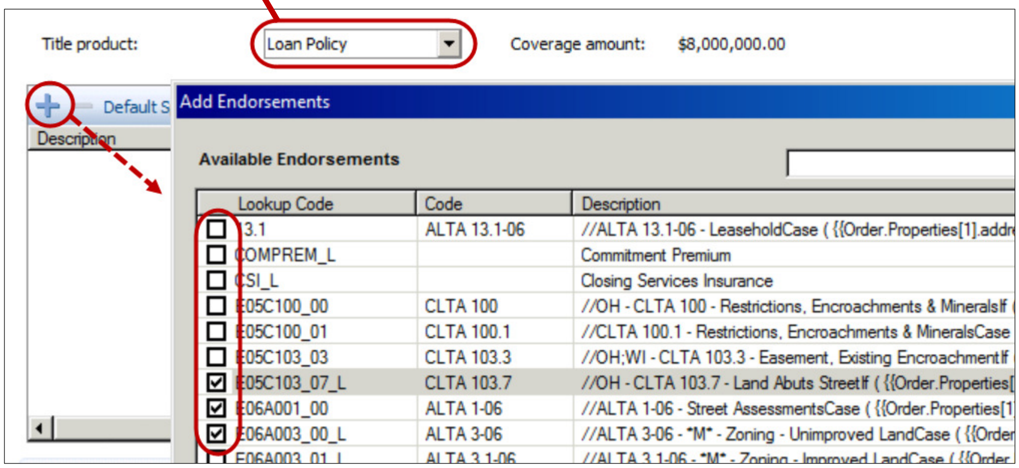


34. If applicable, send the fee split sheet to the Escrow Company

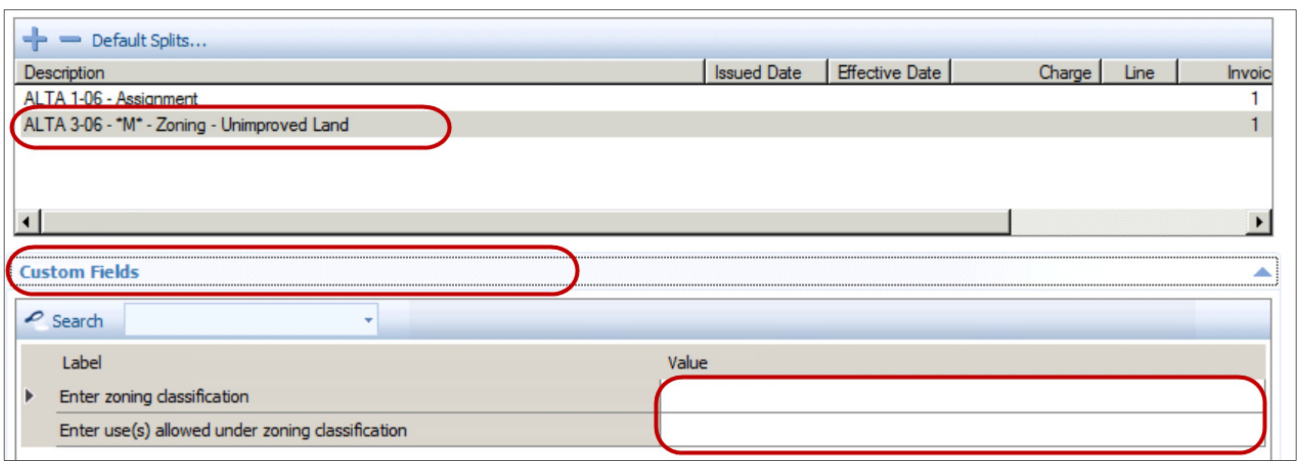
Entering Fees

Adding Policy Endorsements

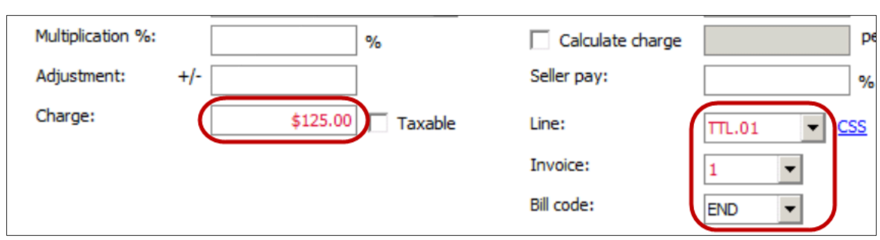
1. If applicable, from the **Title product** drop-down, select a Policy (i.e., Loan and/or Owner's, whichever you want to add Endorsements to)
2. Click the **Add Endorsements** + icon
3. Check the check box(es) for the **Endorsement(s)** you wish to add for the policy selected in **Step 1**



4. Highlight an endorsement in the grid
   a) Click the **Custom Fields** more/less bar to answer corresponding prompts



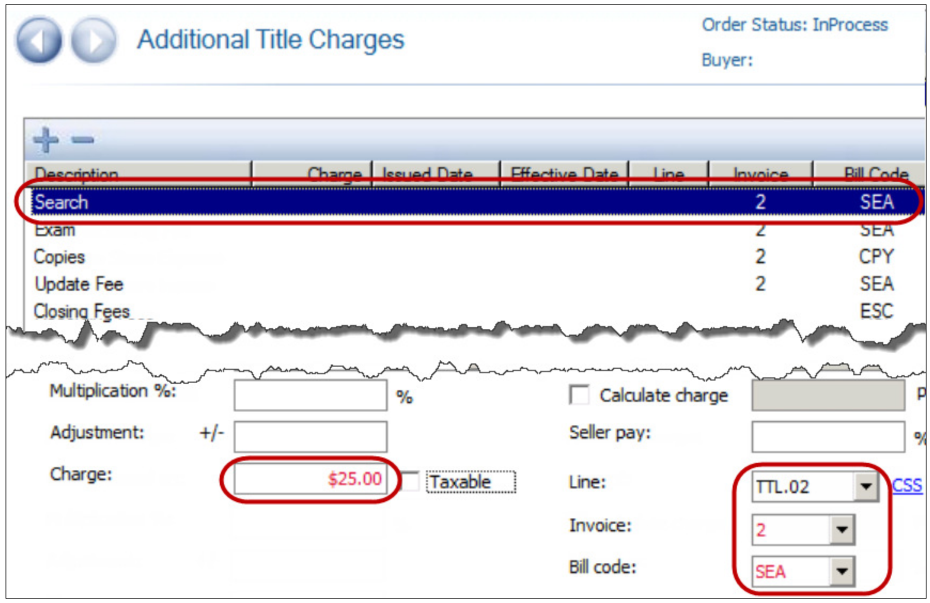
   b) Enter or verify the **Charge**
   c) Verify the **Line** assigned; change if needed
   d) Verify the **Invoice** and **Bill code** are assigned; **do not change**



   e) Repeat **Steps a-d** for each Endorsement
5. If applicable, repeat **Steps 1-4** to add Endorsements to another policy

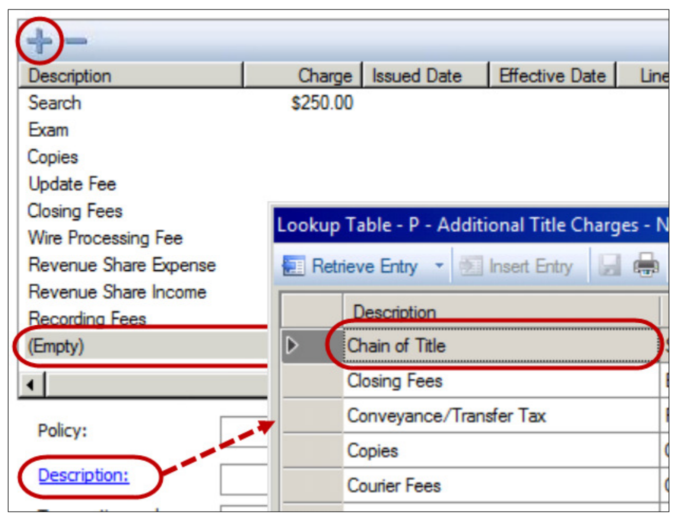
Adding Title Charges

6. Navigate to the **Additional Title Charges** screen
7. Highlight a placeholder in the grid (i.e., **Search, Exam, Copies**, etc.)
8. Enter or verify,
   a) In the **Charge** field, enter the corresponding fee
   b) Verify the **Line** assigned; change if needed
   c) Verify an **Invoice** is assigned; this may be changed if needed
   d) Verify the **Bill code** is assigned – **do not change**

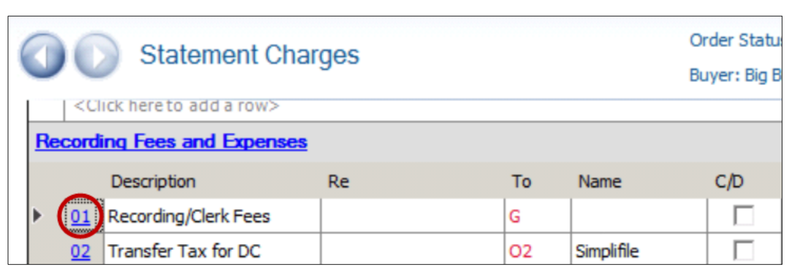


9. If you need to add additional title charges that do not have a placeholder,
   a) Click the **Add Additional Title Charge** icon
   b) Click the **Description** link
   c) Double-click the applicable entry
   d) Repeat **Step 8**
   e) Repeat **Step 9a-d** until all fees are entered

> NOTE: The **Payee** for all title charges is the **T**-Contact (your office).



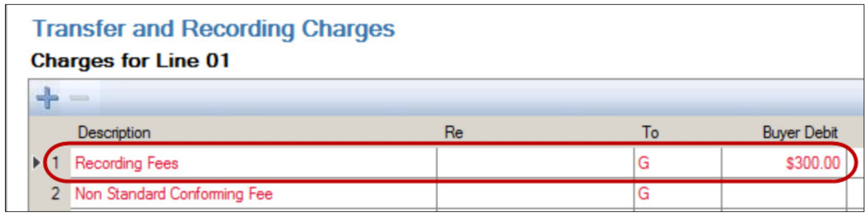
10. Enter Recording charges
    a) Navigate to the **Statement Charges** screen **Line RC.01**
    b) Click the **Line** number link



c) Enter or select the,

i. **Description**

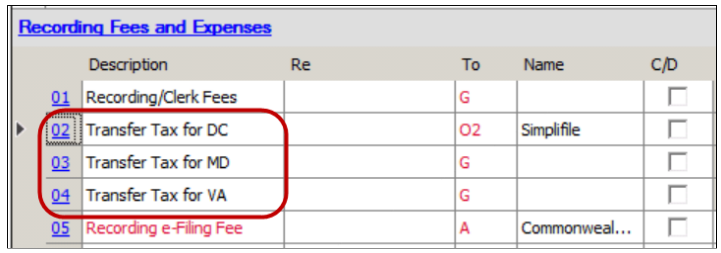
ii. **To** code = **O2** if e-recording; **G** if cutting a check to the government



iii. Applicable **Buyer/Seller Debit** field = recording fee

11. Enter Transfer Taxes

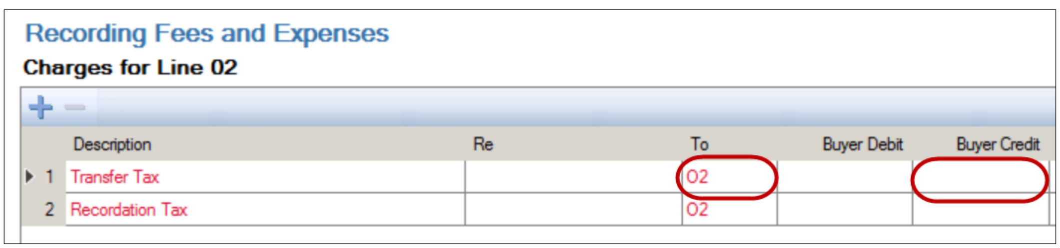
a) Click the **Line** number link of the corresponding state entry



b) On the applicable line,

i. select the **To** code = **O2** if e-recording; **G** if cutting a check to the government

ii. enter the amount in the applicable **Buyer Debit** column

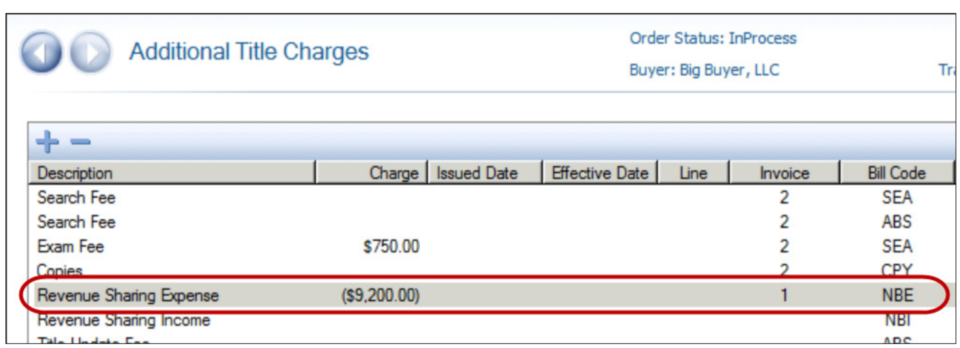


Entering Revenue Sharing Entries

12. Navigate to the **Additional Title Charges** screen

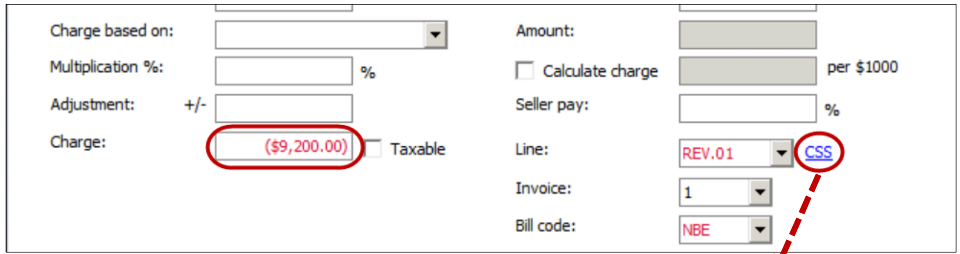
13. Add the Revenue Share Expense

a) Highlight the **Revenue Share Expense** entry in the grid (refer to the Split Sheet)

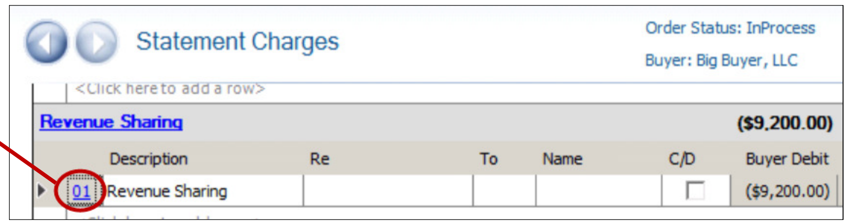


b) In the **Charge** field, enter the amount as a **negative** number

c) Click the **CSS** link

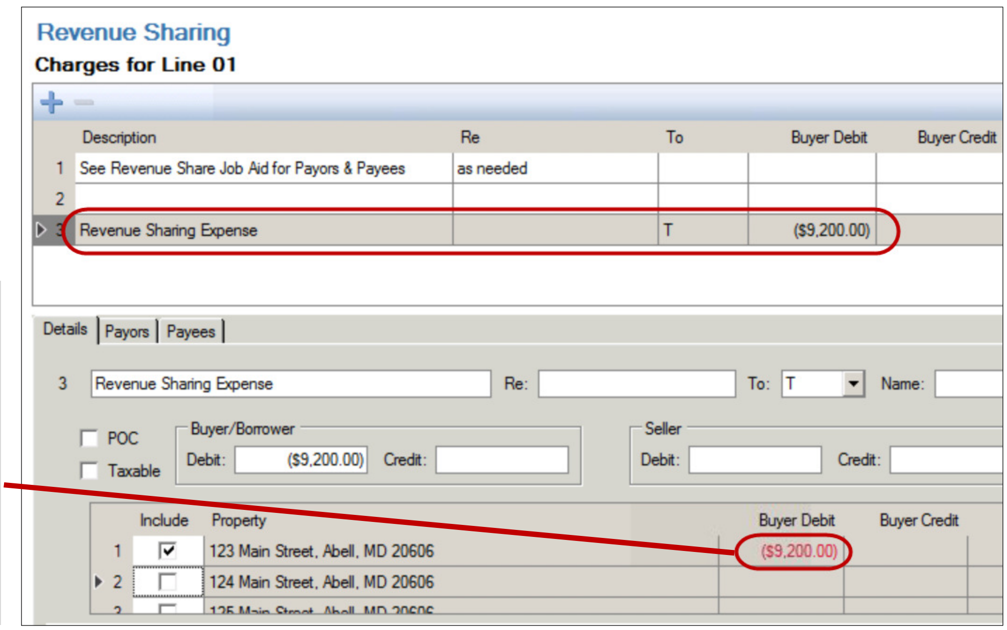


d) Click the **Line** number link of the line assigned



e) Highlight the **Revenue Share Expense** entry

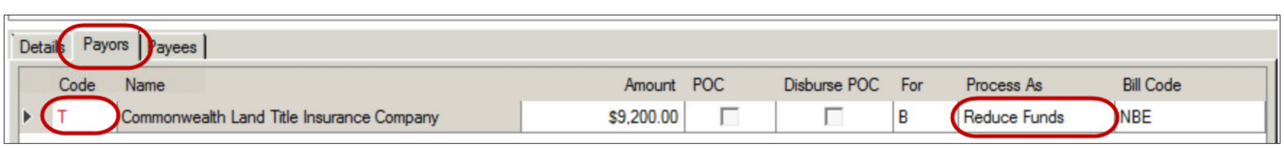
NOTE: If the order has multiple properties, CRRAR validation rules require the Revenue Share Income/Expense entries be associated with only **one** property. Enter the total amount in the **Buyer Debit** field of the first property.



f) Click the **Payors** tab

g) From the **Code** drop-down, select **T**

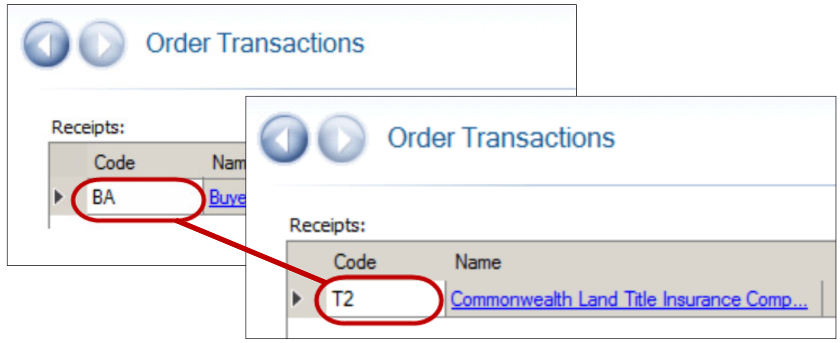
h) Verify **Process as = Reduce Funds;** click the **Close** button



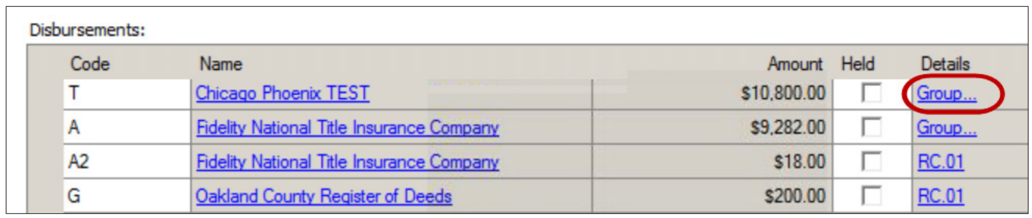
14. Navigate to the **Order Transactions** screen
15. Where the **Receipts** > **Code** = **BA**, select **T2** from the drop-down

Before

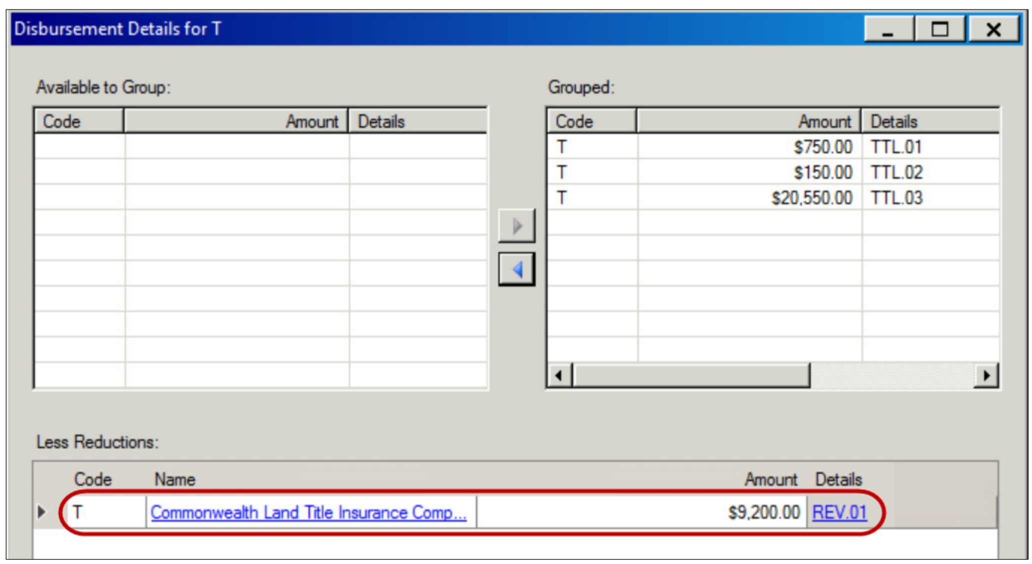
After



16. In the **Disbursements** section, click the **Group** link for the **T**-Contact



17. Verify the **Revenue Share Expense** is shown in the **Less Reductions** section



The **Register** shows the net pending receipt from the outside Company (non-revenue **E-/T2**-Contact)