


Processing a Title Only Order

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

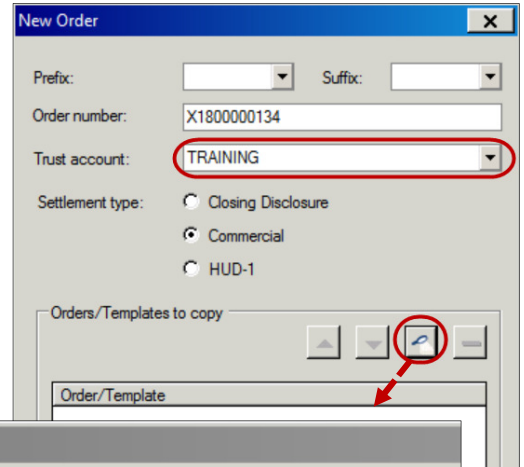
- > Opening the Order | [Page 1](#)
- > Entering Fees | [Page 5](#)

Creating the Order

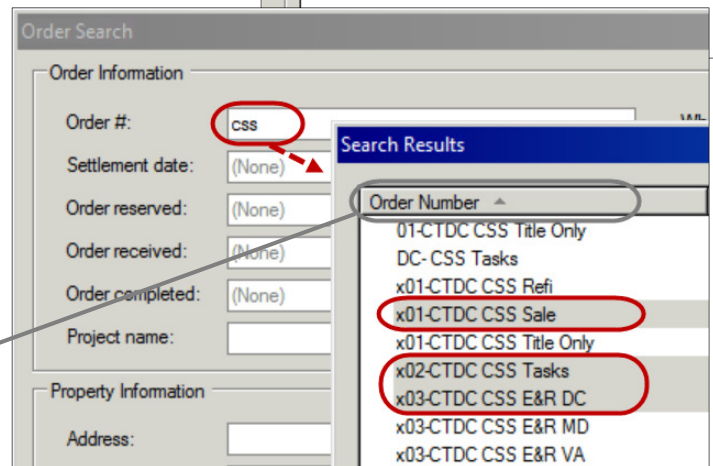
1. Create a new order
2. Select the **Trust account**
3. Apply templates
 - a) Click the **Search**  icon
 - b) In the **Order #** field, enter **CSS**; press the **Enter** key
 - c) Highlight the appropriate **01-CTDC CSS** template (i.e., **Sale, Refi**)
 - d) Holding the **Ctrl** key, highlight the
 - » **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.

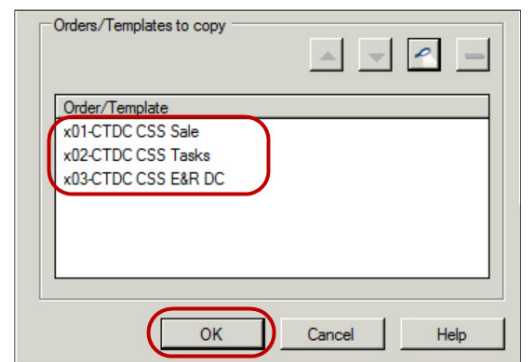
4. Click the **OK** button
5. Click the **OK** button to generate the order



The 'New Order' dialog box shows the following fields: Prefix (dropdown), Suffix (dropdown), Order number (text field with 'X1800000134'), Trust account (dropdown menu with 'TRAINING' selected and circled in red), Settlement type (radio buttons for 'Closing Disclosure', 'Commercial' (selected), and 'HUD-1'). At the bottom, there is a section 'Orders/Templates to copy' with a list box and navigation buttons. A red circle highlights the search icon in the bottom right corner.



The 'Order Search' dialog box has two tabs: 'Order Information' and 'Search Results'. In the 'Order Information' tab, the 'Order #' field contains 'css' (circled in red). The 'Search Results' tab is active, showing a list of templates sorted by 'Order Number'. The list includes: '01-CTDC CSS Title Only', 'DC- CSS Tasks', 'x01-CTDC CSS Refi', 'x01-CTDC CSS Sale' (circled in red), 'x01-CTDC CSS Title Only', 'x02-CTDC CSS Tasks' (circled in red), 'x03-CTDC CSS E&R DC' (circled in red), 'x03-CTDC CSS E&R MD', and 'x03-CTDC CSS E&R VA'. A red arrow points from the 'css' entry in the 'Order #' field to the search results list.



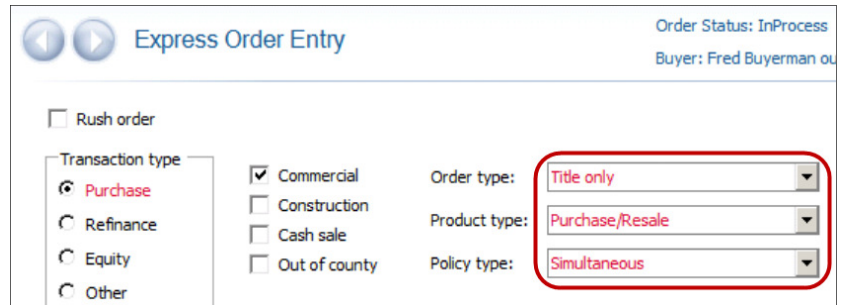
The 'Orders/Templates to copy' dialog box shows a list box with the following templates: 'x01-CTDC CSS Sale' (circled in red), 'x02-CTDC CSS Tasks' (circled in red), and 'x03-CTDC CSS E&R DC' (circled in red). At the bottom, there are three buttons: 'OK' (circled in red), 'Cancel', and 'Help'.

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Entering Order Details

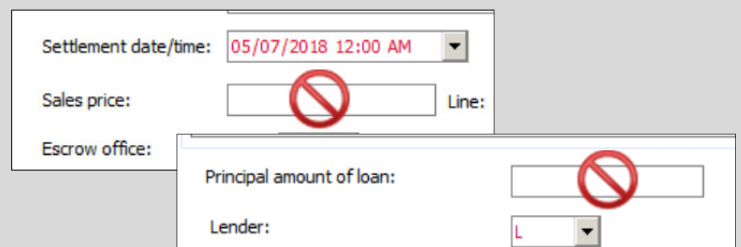
On the **Express Order Entry** screen,

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

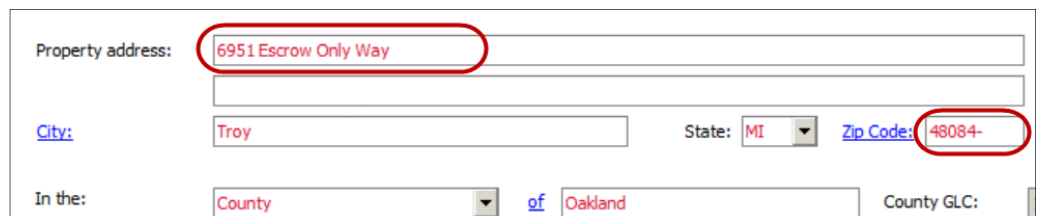


8. Select the **Escrow officer/Closer**; this allows the EO to receive wire notifications
9. Select the **Pre-closer/Escrow assistant** (if applicable)
10. Select the **Title officer/Examiner**
11. Enter or select, the **Settlement date** (if known)

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

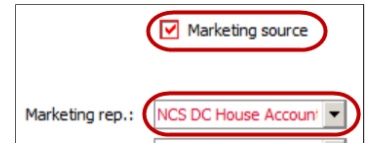


Entering Contacts

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

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- › 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)



Marketing source: ☒ Marketing source

Marketing rep.: **NCS DC House Account**

Calculating Premiums

16. Navigate to the **Policy Selection** screen

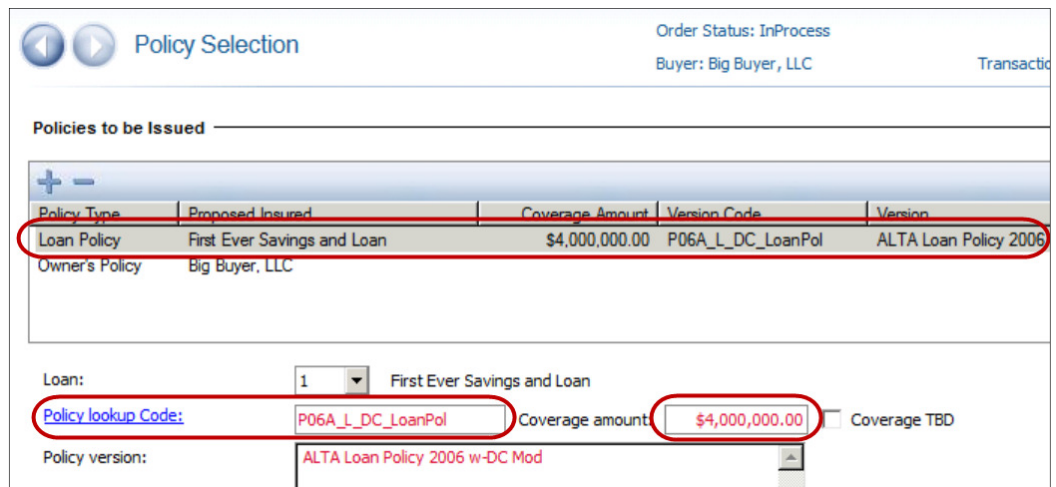
17. Highlight the first policy in the grid

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



Order Status: InProcess
Buyer: Big Buyer, LLC

Policies to be Issued

Policy Type	Proposed Insured	Coverage Amount	Version Code	Version
Loan Policy	First Ever Savings and Loan	\$4,000,000.00	P06A_L_DC_LoanPol	ALTA Loan Policy 2006
Owner's Policy	Big Buyer, LLC			

Loan: 1 First Ever Savings and Loan

Policy lookup Code: **P06A_L_DC_LoanPol** Coverage amount: **\$4,000,000.00** Coverage TBD

Policy version: **ALTA Loan Policy 2006 w-DC Mod**

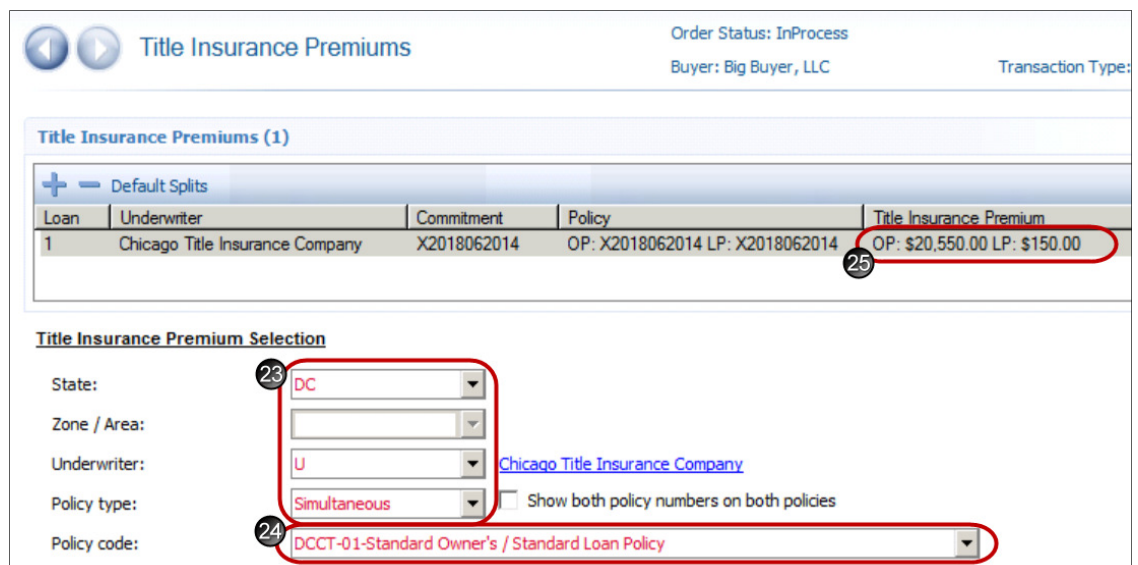
22. Navigate to the **Title Insurance Premiums** screen

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)



Order Status: InProcess
Buyer: Big Buyer, LLC

Title Insurance Premiums (1)

Loan	Underwriter	Commitment	Policy	Title Insurance Premium
1	Chicago Title Insurance Company	X2018062014	OP: X2018062014 LP: X2018062014	OP: \$20,550.00 LP: \$150.00

Title Insurance Premium Selection

State: **DC**

Zone / Area:

Underwriter: **U** Chicago Title Insurance Company

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

Policy code: **DCCT-01-Standard Owner's / Standard Loan Policy**

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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

Owner's Policy

Policy number: X2018062014
Coverage amount: **\$5,000,000.00**
Seller pay %:
Final owner's premium: \$20,550.00
Remarks:

[Prior policy adjustment:](#)
Seller pay amount:
Transaction code: 1000

Owner's Policy Premium and Split


Loan Policy

Policy number: X2018062014
Coverage amount: **\$4,000,000.00**
Seller pay %:
Final loan premium: \$150.00
Remarks:

[Prior policy adjustment:](#)
Seller pay amount:
Transaction code: 3202

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**


Requested Tasks

Order Status: InProcess
Buyer: Big Buyer, LLC
Transaction Type:


Status	Task	Category	Occurs	Assigned To
Requested	01. Order Sent to TitleWave/Abstractor		Pre-closing	CTDC Open Order
	02. Commitment Production		Pre-closing	
	02. Commitment to U/W		Pre-closing	
	03. Distribute Commitment		Pre-closing	
	04. Survey/Review/Commitment Updated		Pre-closing	
	05. Update Ordered		Pre-closing	
	06. Update Commitment		Pre-closing	
	07. Review Authority Docs		Pre-closing	
	08. Pro Forma Sent to Customer		Pre-closing	
	09. Order Closed		Pre-closing	
	10. Originals Received		Pre-closing	

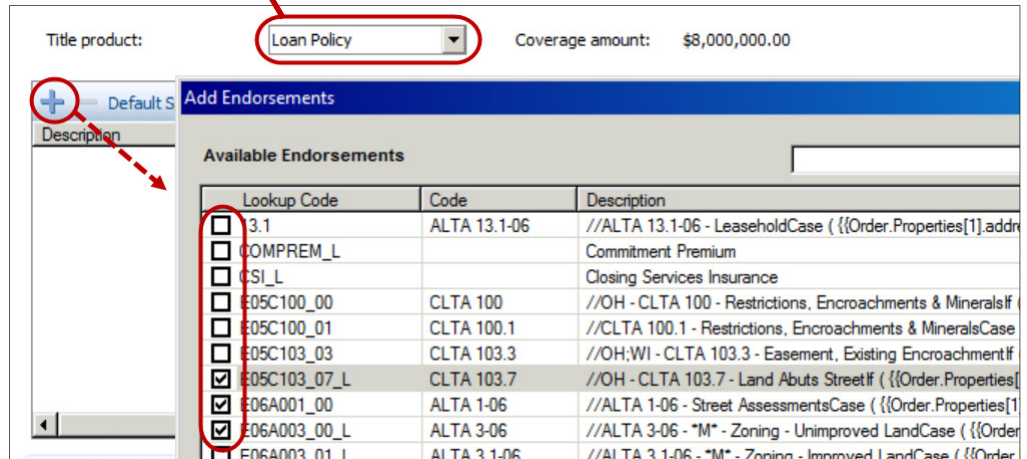
Occurs: ☒ Pre-closing ☐ Post-closing
Code: Task: 01. Order Sent to TitleWave/Abst Status: **Requested**
Category: Assigned to: CTDC Open Order

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

Entering Fees

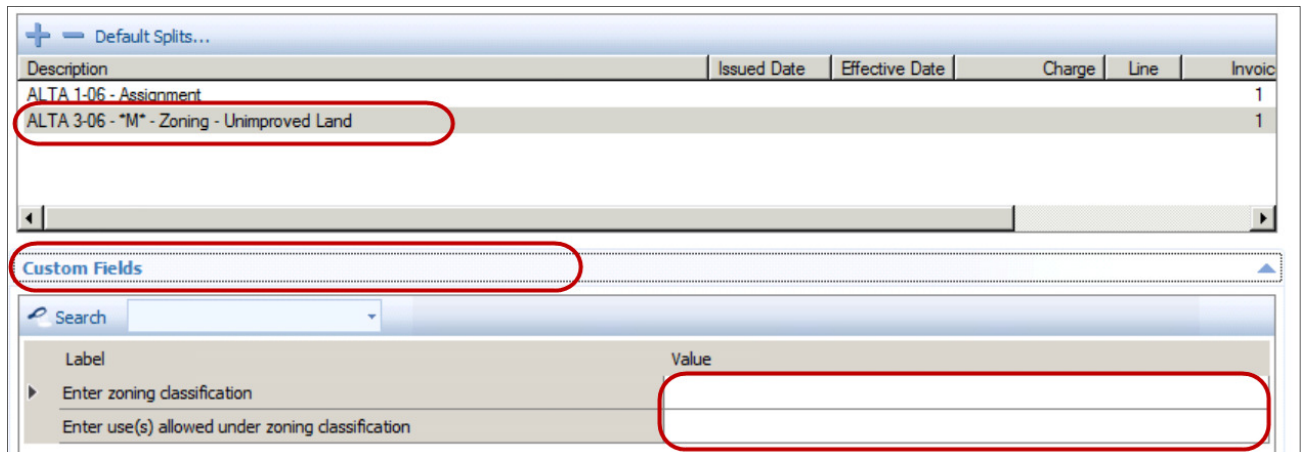
Adding Policy Endorsements

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**



Lookup Code	Code	Description
3.1	ALTA 13.1-06	//ALTA 13.1-06 - LeaseholdCase ({{Order.Properties[1].addr
<input type="checkbox"/>	COMPREM_L	Commitment Premium
<input type="checkbox"/>	CSI_L	Closing Services Insurance
<input type="checkbox"/>	E05C100_00	//OH - CLTA 100 - Restrictions, Encroachments & MineralsIf
<input type="checkbox"/>	E05C100_01	//CLTA 100.1 - Restrictions, Encroachments & MineralsCase
<input type="checkbox"/>	E05C103_03	//OH:WI - CLTA 103.3 - Easement, Existing EncroachmentIf
<input checked="" type="checkbox"/>	E05C103_07_L	//OH - CLTA 103.7 - Land Abuts StreetIf ({{Order.Properties[1
<input checked="" type="checkbox"/>	E06A001_00	//ALTA 1-06 - Street AssessmentsCase ({{Order.Properties[1
<input checked="" type="checkbox"/>	E06A003_00_L	//ALTA 3-06 - *M* - Zoning - Unimproved LandCase ({{Order
<input type="checkbox"/>	E06A003_01_L	//ALTA 3-06 - *M* - Zoning - Improved LandCase ({{Order

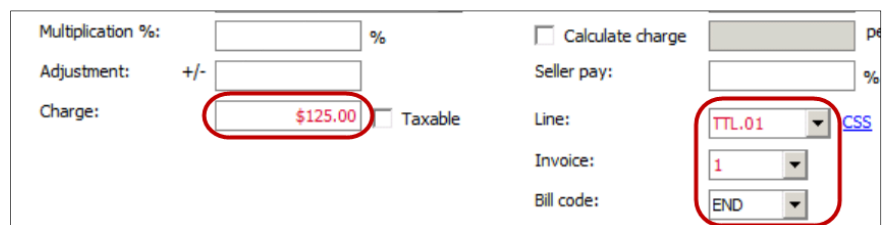
4. Highlight an endorsement in the grid
 - a) Click the **Custom Fields** more/less bar to answer corresponding prompts



Description	Issued Date	Effective Date	Charge	Line	Invoice
ALTA 1-06 - Assignment					1
ALTA 3-06 - *M* - Zoning - Unimproved Land					1

Label	Value
Enter zoning classification	
Enter use(s) allowed under zoning classification	

- 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



Multiplication %:		%	<input type="checkbox"/> Calculate charge		%
Adjustment:	+/-		Seller pay:		%
Charge:		\$125.00	Line:	TTL.01	CSS
		<input type="checkbox"/> Taxable	Invoice:	1	
			Bill code:	END	

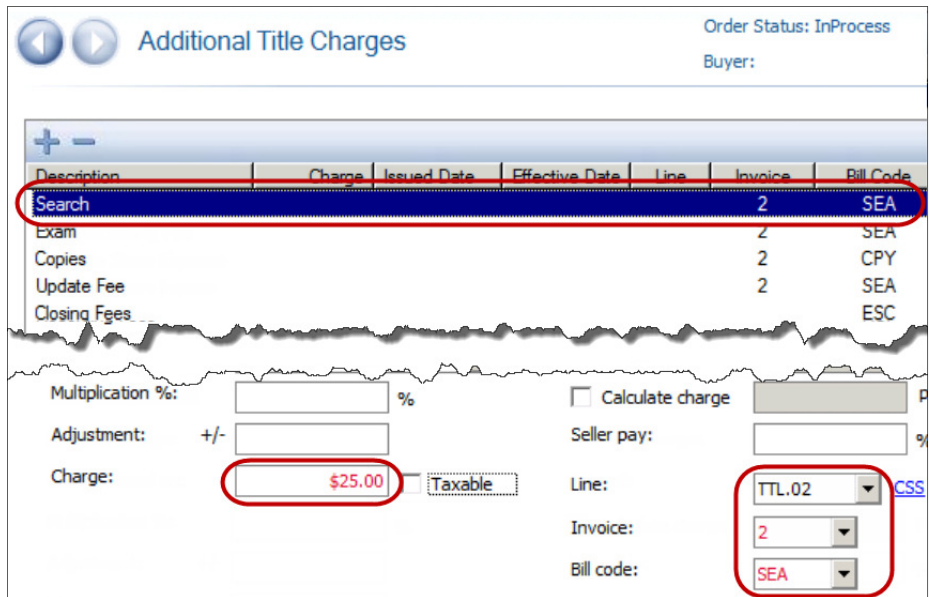
5. If applicable, repeat **Steps 1-4** to add Endorsements to another policy

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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**



Description	Charge	Issued Date	Effective Date	Line	Invoice	Bill Code
Search				2	SEA	
Exam				2	SEA	
Copies				2	CPY	
Update Fee				2	SEA	
Closing Fees					ESC	


Multiplication %: % ☐ Calculate charge

Adjustment: +/- Seller pay: %

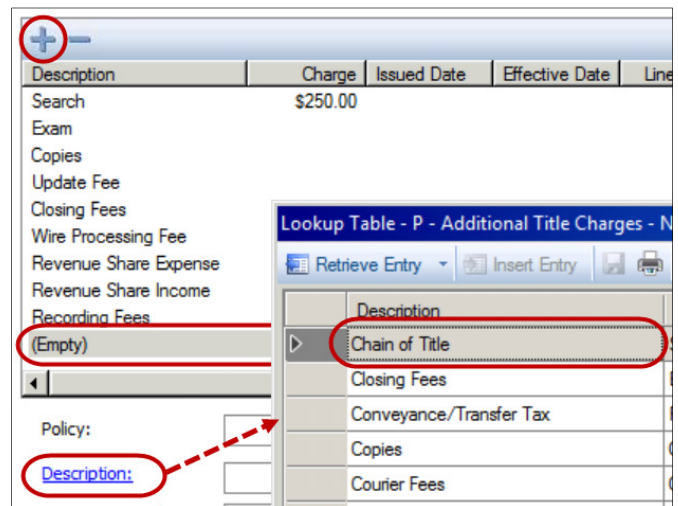
Charge: Taxable

Line: Invoice: Bill code:

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).



Description	Charge	Issued Date	Effective Date	Line
Search	\$250.00			
Exam				
Copies				
Update Fee				
Closing Fees				
Wire Processing Fee				
Revenue Share Expense				
Revenue Share Income				
Recording Fees				
(Empty)				

Policy:

Lookup Table - P - Additional Title Charges - N

Retrieve Entry Insert Entry

Description
Chain of Title
Closing Fees
Conveyance/Transfer Tax
Copies
Courier Fees

10. Enter Recording charges

- a) Navigate to the **Statement Charges** screen Line RC.01
- b) Click the **Line** number link



Order Status: Buyer: Big B

<Click here to add a row>

Recording Fees and Expenses

Description	Re	To	Name	C/D
01 Recording/Clerk Fees		G		<input type="checkbox"/>
02 Transfer Tax for DC		O2	Simplifile	<input type="checkbox"/>

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- 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

Transfer and Recording Charges			
Charges for Line 01			
Description	Re	To	Buyer Debit
1 Recording Fees		G	\$300.00
2 Non Standard Conforming Fee		G	

11. Enter Transfer Taxes

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

Recording Fees and Expenses					
Description	Re	To	Name	C/D	
01 Recording/Clerk Fees		G			<input type="checkbox"/>
02 Transfer Tax for DC		O2	Simplifile		<input type="checkbox"/>
03 Transfer Tax for MD		G			<input type="checkbox"/>
04 Transfer Tax for VA		G			<input type="checkbox"/>
05 Recording e-Filing Fee		A	Commonweal...		<input type="checkbox"/>

- 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

Recording Fees and Expenses					
Charges for Line 02					
Description	Re	To	Buyer Debit	Buyer Credit	
1 Transfer Tax		O2			
2 Recordation Tax		O2			

Entering Revenue Sharing Entries

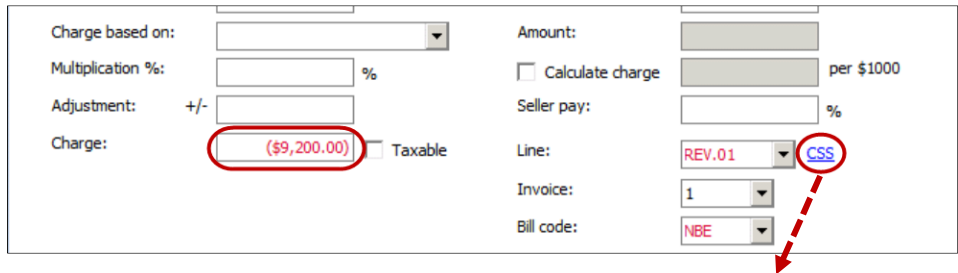
12. Navigate to the **Additional Title Charges** screen
13. Add the Revenue Share Expense

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

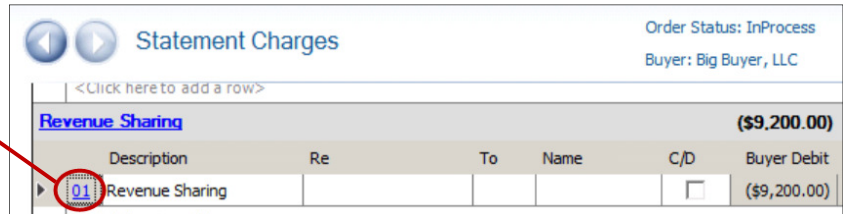
Additional Title Charges						
Order Status: InProcess						
Buyer: Big Buyer, LLC						
Description	Charge	Issued Date	Effective Date	Line	Invoice	Bill Code
Search Fee				2		SEA
Search Fee				2		ABS
Exam Fee	\$750.00			2		SEA
Copies				2		CPY
Revenue Sharing Expense	(\$9,200.00)			1		NBE
Revenue Sharing Income						NBI
Title Update Fee						ABS

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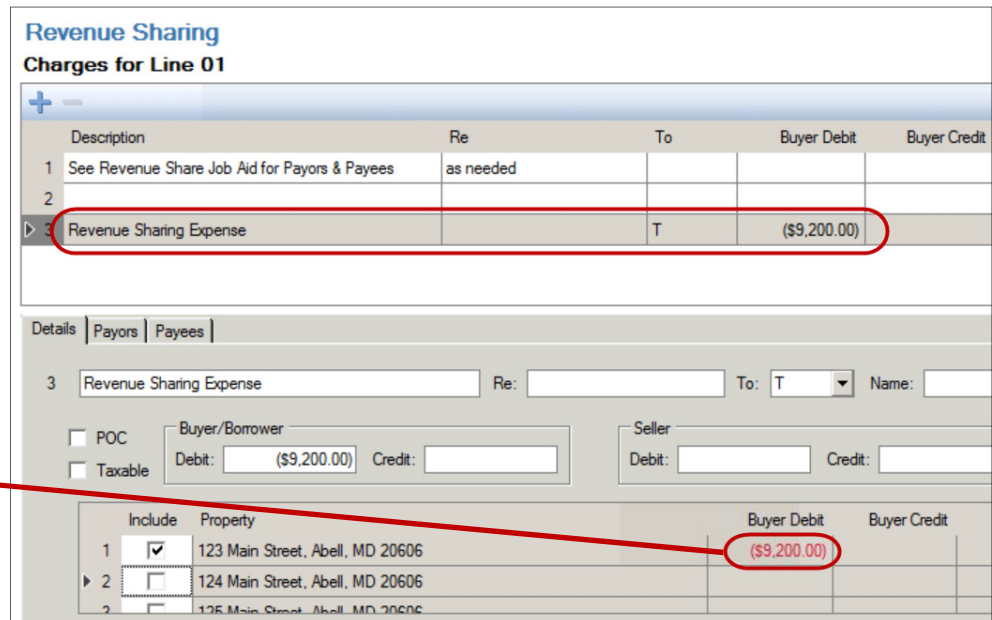
- b) In the **Charge** field, enter the amount as a **negative** number
- c) Click the **CSS** link



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

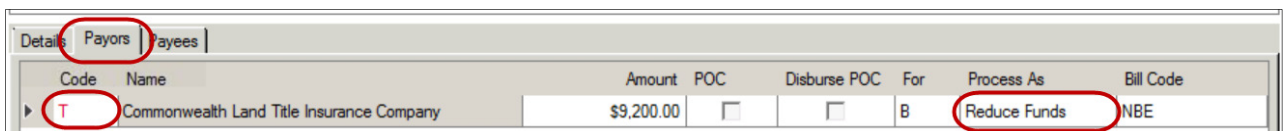


- e) Highlight the **Revenue Share Expense** entry



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

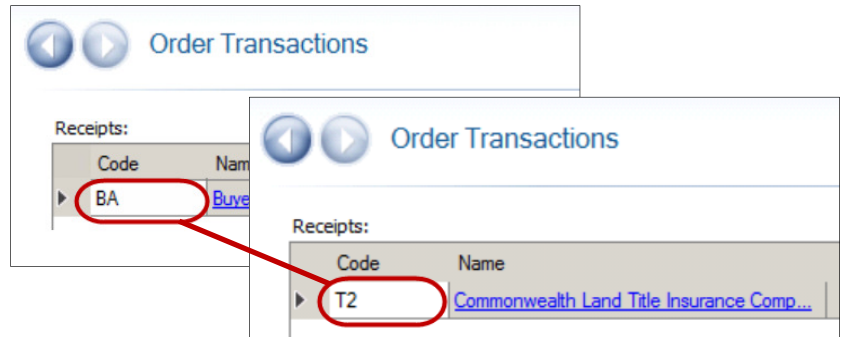


Processing a Title Only Order

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

Before

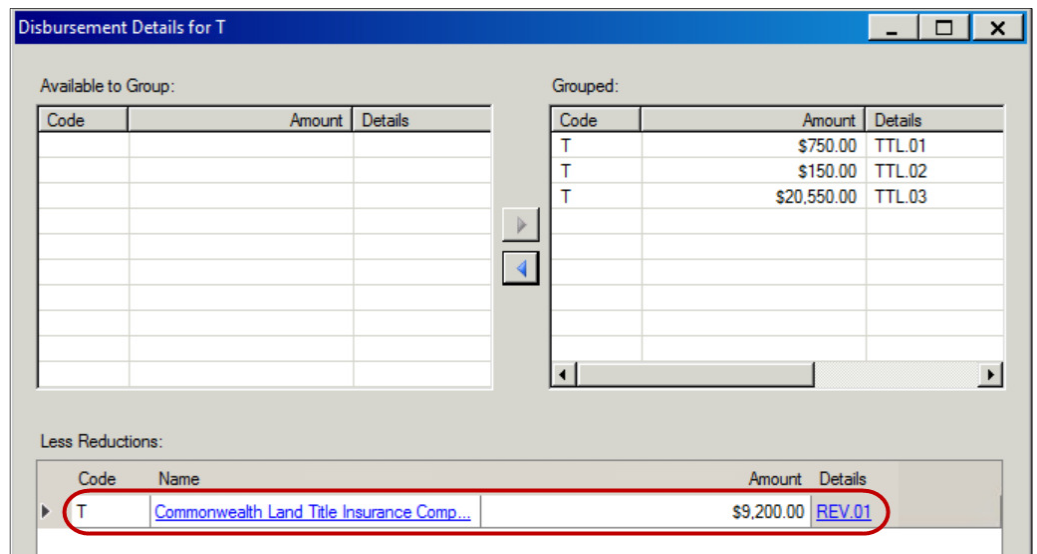
After



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

Disbursements:				
Code	Name	Amount	Held	Details
T	Chicago Phoenix TEST	\$10,800.00	<input type="checkbox"/>	Group...
A	Fidelity National Title Insurance Company	\$9,282.00	<input type="checkbox"/>	Group...
A2	Fidelity National Title Insurance Company	\$18.00	<input type="checkbox"/>	RC.01
G	Oakland County Register of Deeds	\$200.00	<input type="checkbox"/>	RC.01

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)

Transactions		Notes (0)			
<div><div><div><div></div></div><div><div></div></div></div><div><div>Print and Post</div><div>Actions</div><div>Reports</div></div><div><div>Order Transactions</div><div>Anticipated Wires</div></div></div>					
Status	Type	Ref. Number	Trans. Date	Amount	Payee/Payor
Receipts					
Pending	Receipt			\$12,250.00	Commonwealth Land Title Insur...