Using the Title and Closing Interface in Encompass

The interface for the **Title and Closing** service in Encompass allows you to submit orders to participating service providers, manage the agents with whom you do business, attach documents to orders, view status details for each order, and view returned documents. After you place an order, both you and your selected agent are notified by email.

This document describes the required setup activities before you place orders, and then how to place and track orders.

Available Providers

The new title and closing interface is used to place orders with the following providers:

- Alamo Title
- Chicago Title
- Fidelity National Title Insurance Company
- Security Union Title Insurance Company
- Ticor Title

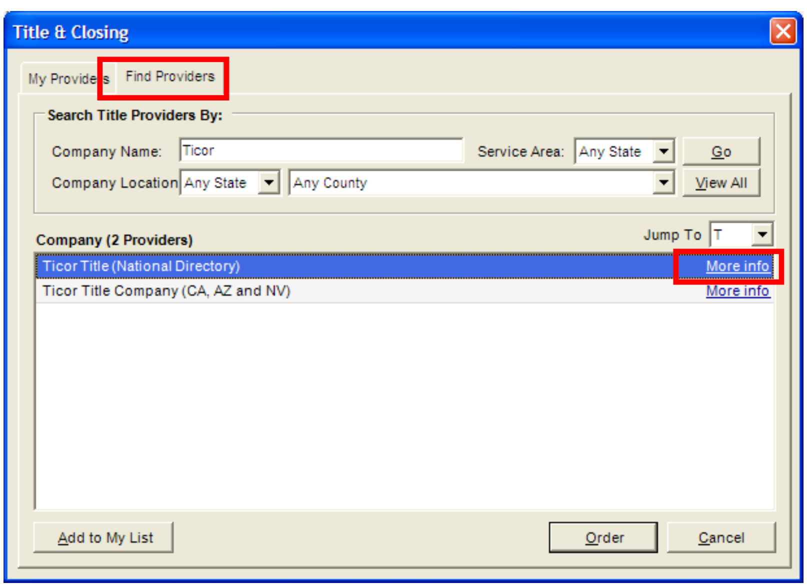
Before Submitting an Order

Before you can place an order with a provider, you must: create an account with the provider and add the names of the agents to whom you will submit orders.

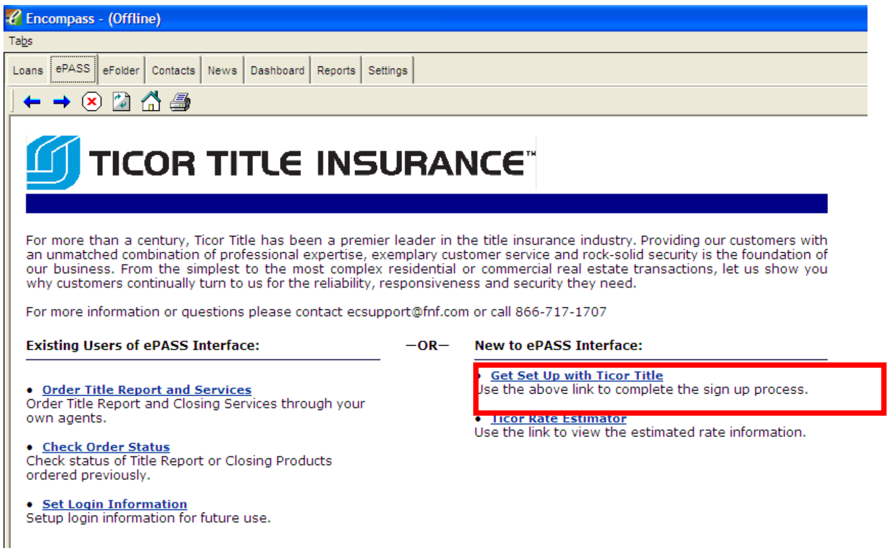
Create an Account

1 Open a loan; click the **Services** tab and then click **Order Title & Closing**.

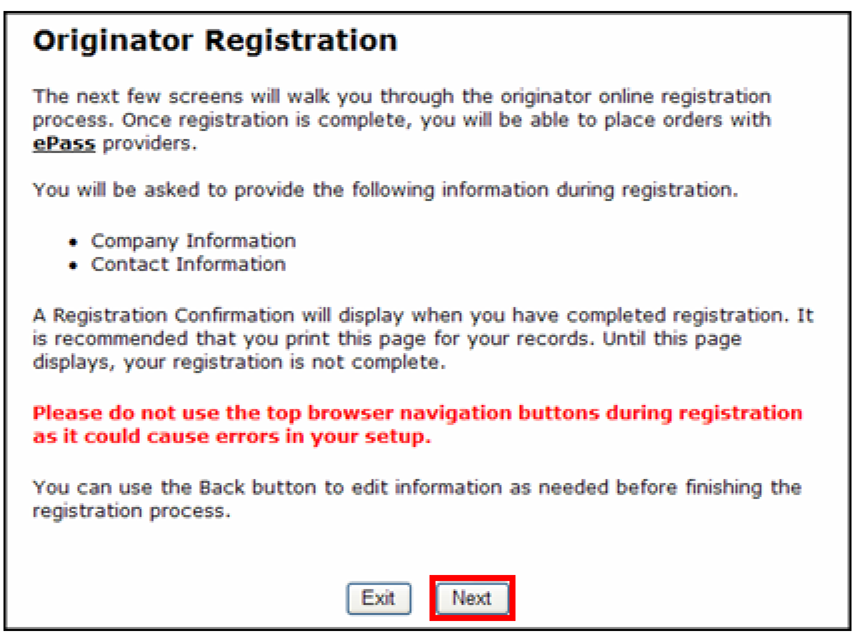
2 On the Title & Closing window, click the **Find Providers** tab.



3 Click the **More info** link associated with one of the five participating service providers.



4 On the right side of the service provider's web page, click the **Get Set Up with..**.link.



5 On the Originator Registration window, click **Next** and follow the instructions to enter your company and contact information.

- The last screen summarizes your registration information and assigns an account ID.

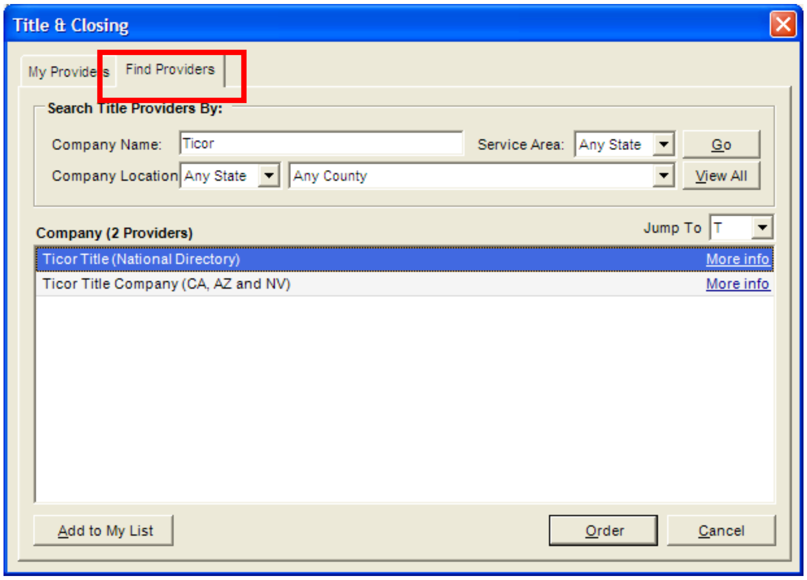
6 Click **Print** to print the Registration Confirmation page, and then click **Close**.

- Your account is activated and ready to use.

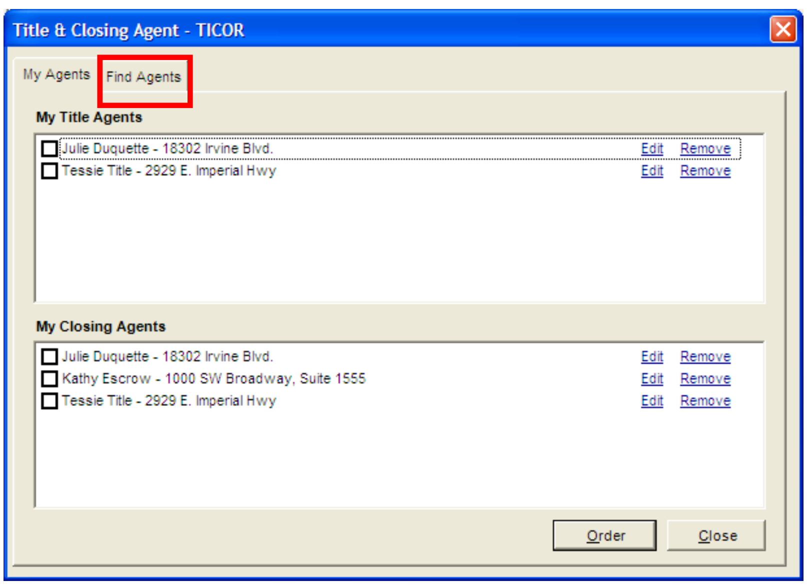
Add the Names of Agents

1 Open a loan; click the **Services** tab and then click **Order Title & Closing**.

2 On the Title & Closing window, click the **Find Providers** tab.



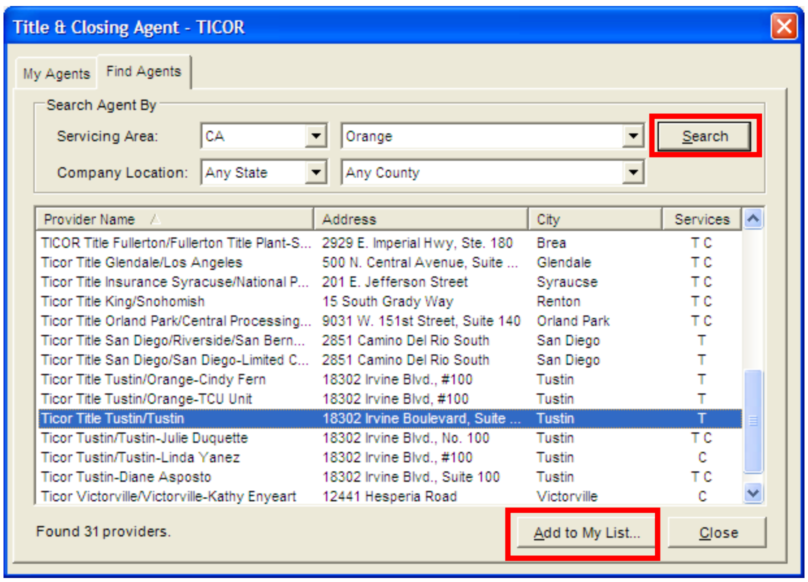
3 Select one of the participating providers and click **Order**.



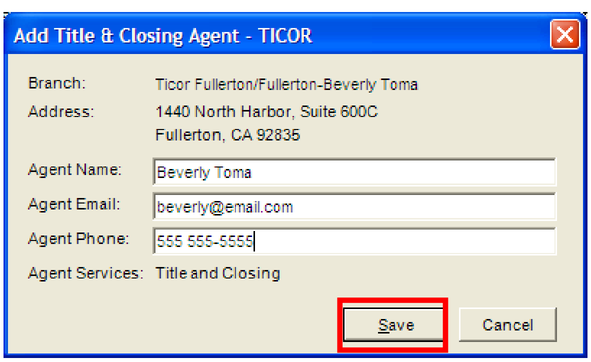
4 On the **Title and Closing Agent** window, click the **Find Agents** tab.

5 There are a couple of options available to locate an agent:

- Option 1: Use the Servicing Area Fields. These will automatically populate with the state and county of the property address for the order you are in. Then click **Search**. The results will list all agents who can service that area. The agents are listed alphabetically by name; their address is provided as well as the type of service offered – title (T) and/or closing (C).
- Option 2: Use the Company Location Fields. These fields work in partnership with the information listed in the Servicing Area fields. Then click **Search.** Using these fields will narrow the search to show those providers that can service the state and county listed in the Servicing Area Fields and that are physically located in the state and/or county selected in the Company Location drop down fields. The agents are listed alphabetically by name; their address is provided as well as the type of service offered – title (T) and/or closing (C).



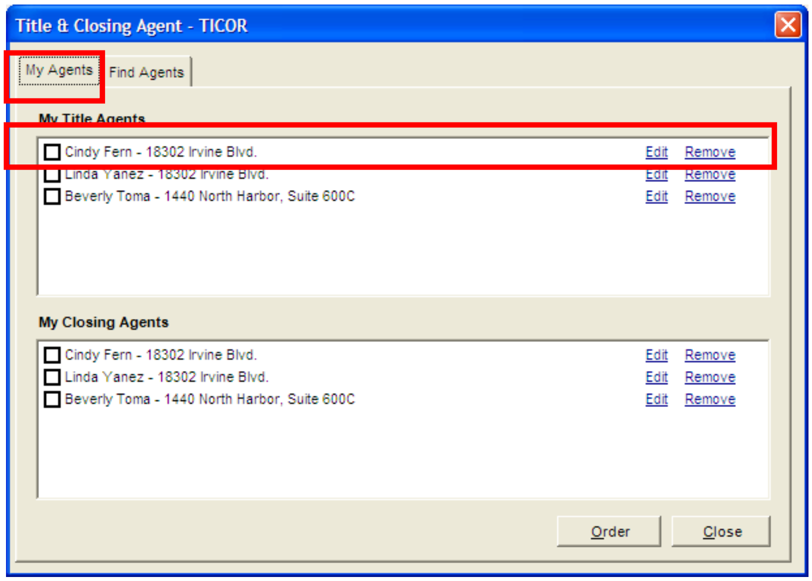
6 Select the Branch (Provider Name) at which the agent works and click **Add to My List**.



7 Type the agent's name, email, and phone.

8 Click **Save**.

9 If you clicked Save, you can continue adding agents. Agents will be saved in your My Agents list under Title Agent or Closing Agent, depending on the type of service they offer. When finished, click **Close**.



Placing and Tracking an Order

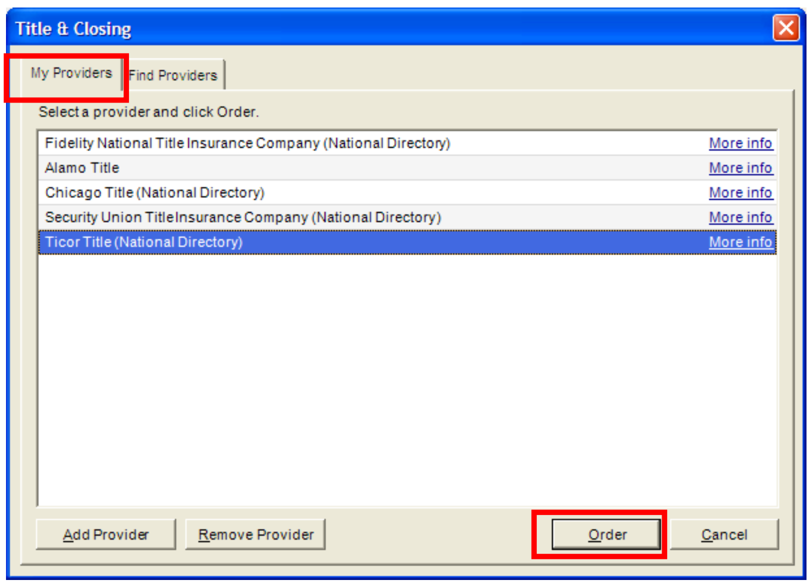
Submit an Order

You can order three types of services: Title, Escrow/Closing and Verifications. The types of services that are available are dependent upon the agent you select.

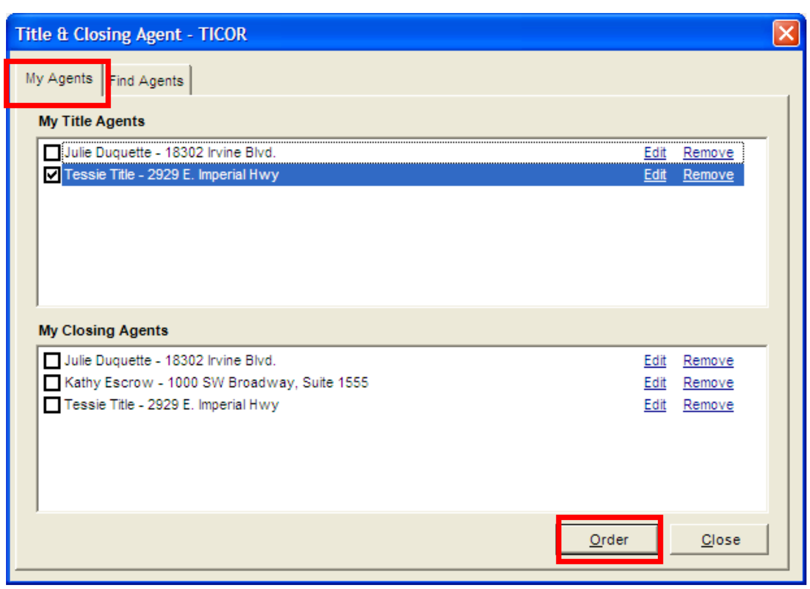
Within a particular service, the available products are based on the selected provider and the geographic area in which the subject property is located. You can request Verifications only if you are also ordering Title or Escrow/Closing products.

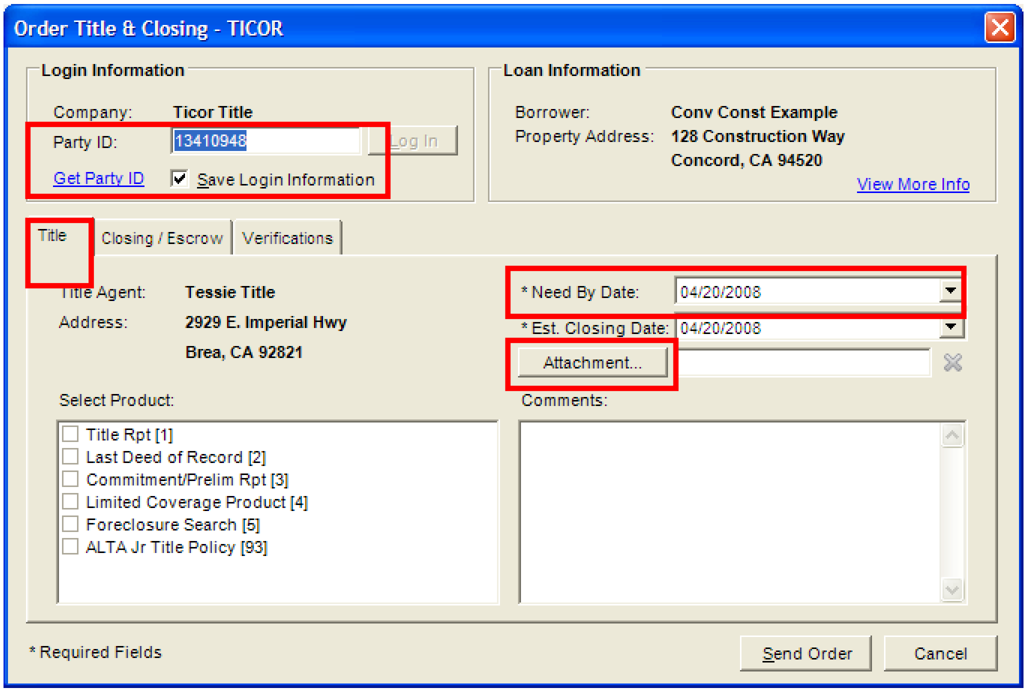
1 Open a loan; click the **Services** tab and then click **Order Title & Closing**.

2 On the Title & Closing window, select your provider from the **My Providers** tab or select **Find Providers** to add a provider to your list. Select **Order**.



3 On the Title & Closing Agent Window, select a title agent and/or closing agent from your **My Agents** list and click **Order.**





4 On the Order Title & Closing window, type the Account ID that you created during the account setup process. If you do not have an Account ID, click on the Get Party ID link and follow the instructions provided.

5 Click the **Title Tab** to see the title products offered by the title provider you selected.

Note: *If the selected branch/agent does not service the area in which the subject property is located, no products will be listed.*

6 Select a product from the list.

7 Enter the **Need By Date**.

8 Click **Attachment** to attach a .pdf or .doc document.

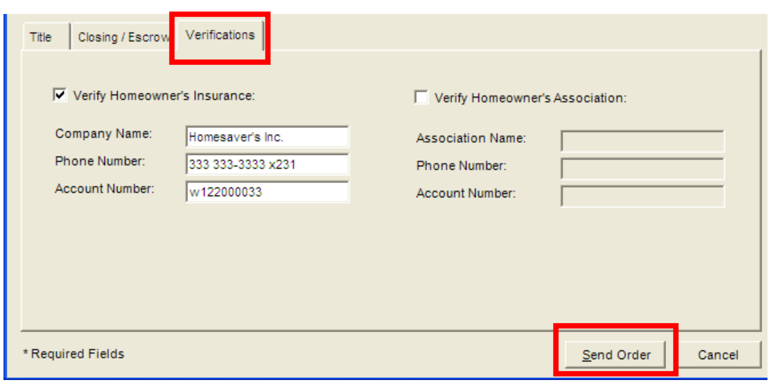
- Select a browse location (**hard drive** or **Encompass eFolder**) and click **Continue**.
- Select the document and click **Open** or **OK**.

9 Enter comments and special instructions as needed.

10 Click the **Escrow/Closing** tab.

11 Repeat steps 6 through 9 above, and then enter an Estimated Closing Date.

12 Click the **Verifications** tab.



13 Select one or both of the verification checkboxes.

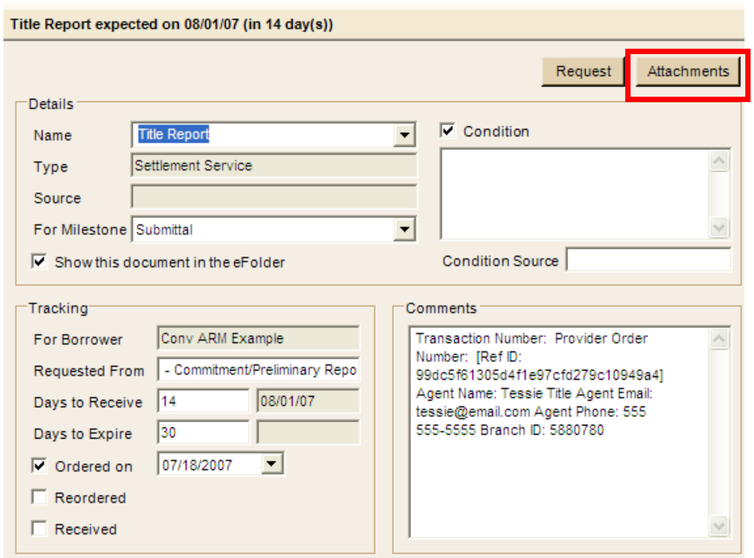
14 Type name, phone and account number information for each verification.

15 Click **Send Order**.

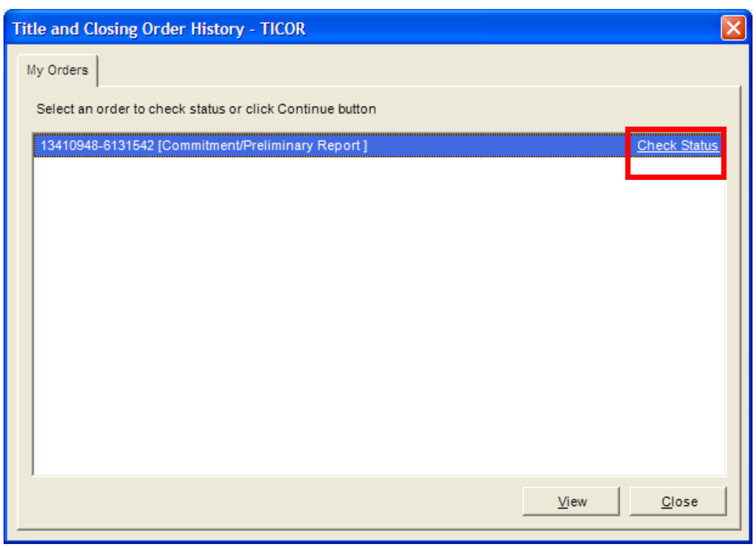
16 Click **OK** in response to the confirmation message.

View Order Status

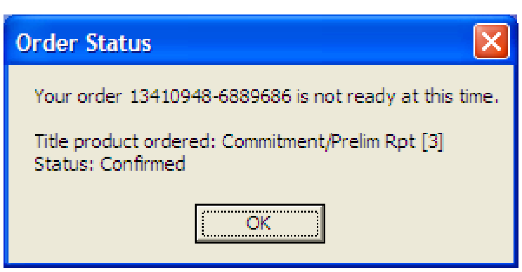
An entry is created in the log showing details of the order you just placed. (An entry is also created in the Settlement Services section on the eFolder tab.)



1. To view the status of the order, click the entry in the log, and then click **Attachments** on the log worksheet.
   - Or, in the Settlement Service section of the eFolder, select the order and then click **Retrieve**.



2. On the Title and Closing Order History window, click **Check Status** to the right of your order. A separate order is created for each product requested.
   - You can continue to check the status until the order is complete.



View Returned Documents

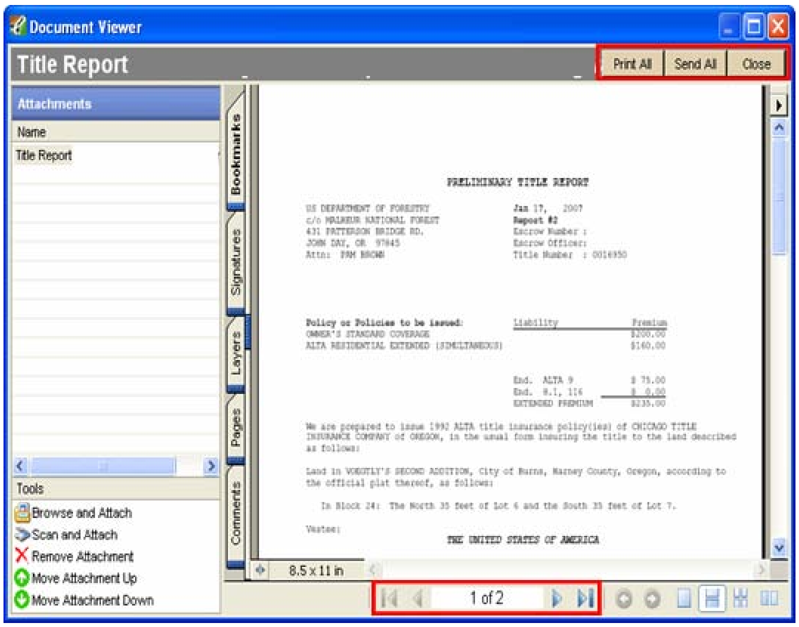
When the order is complete, a "received" entry is created in the log. You can review the returned documents as follows:

1 On the Services tab, click the document icon to the right of the Order Title & Closing button.

- Or, click the "received" entry in the log, and then click **Attachments** on the log worksheet.
- Or, in the Completed Documents section of the eFolder, double click the document.

2 On the View Document window, select the order, and then click **View**.

The document opens in the Document Viewer.



3 Use the arrow keys at the bottom of the viewer to page through the document.

4 Click **Print All** to print the document.

5 Click **Send All** to attach the document to an email.

6 When finished, click **Close**.