



CPLs – Process in AtClose

You can request, view, and void Closing Protection Letters (CPLs) in AtClose.

Generate a CPL

After you enter lender information and create a title commitment product for your order, you can generate a CPL document:

1. Enter the order number on the AtClose dashboard
2. Select the **Transactions** tab
3. Scroll down to the **Products** section and select the Commitment product

The screenshot shows the AtClose VISIONET dashboard. On the left is a navigation menu with options like Inbox, Accounting, Clients, Dashboard, Integration, Maintenance, Orders, Quote, Reports, Underwriter, and Utilities. The main area is titled 'ORDER > VIEW : (In Progress)'. It has tabs for Details, Contact, Transactions (selected), Accounting Summary, and Shared. Under the Transactions tab, there are fields for Amortization Type, Investor, Order Type, Product Type, MCA, Created Date, Completed Date, Rush Contract, Exclude order from IRS submission, and Disable Auto Assignment. To the right of these fields are input fields for Sales Price, New Loan Amount, Modified Loan Amount, Over the Limit, and Effective Price Date. At the bottom, there is a 'Products' section with a table. The table has columns for Product Category, Product, Bundle, Service Center, Status, and Completion Date. The first row shows 'Title' as the Product Category and 'Title Commitment - Refinance' as the Product. A red circle 3 highlights this product name.

NOTE: The **Order Product** view's **Details** tab displays.

The screenshot shows the 'ORDER PRODUCT > VIEW : Title Commitment - Refinance' page. It has tabs for Details, Client Fee Summary, Vendor Assignments, Product Delivery, Shared, and Action Items. The Details tab is selected. Below the tabs, there is a section for 'Product Information' with fields for Product, Bundle, Order Date, Client Due Date, Product Status, and Completion Date. To the right of this is a section for 'Title Commitment - Refinance Details' with fields for Proposed Insured, Proposed Text, and Underwriter. A red circle 1 highlights the 'Details' tab.



4. Scroll down to the **Title Policies** section and select the policy to expand its **Details** section

Title Policies	
Policy Type	Lender's Insured Amount
ALTA Loan Policy	\$100,000.00

5. Click **Actions > Request CPL**

Request CPL

Void CPL

Update Product Status

Preliminary CD

Cancel Order

Workshare Split

Title Calculator

Title Policy Form

Title Product Form

Calculate PremiumEditCloseActions

6. Select the **Office**

NOTE: Fields below will display according to your selection. If there is no Lender information available on the Order, then AtClose will not display any selections in the **Select Office** field. You must first add Lender details for the Order on the **Order Contact** screen.

7. Select the **Document Type** and complete other field selections as needed:

8. Click **Get Document**

Request CPL

Select Office

Use Missouri CPL

Document Type

Schedule A Firm Location

Closing Date

Approved Attorney State

Select Closing Attorney

6

7

8

Get DocumentClose

NOTE: The CPL displays in a separate window where you can save or print it. When you close the CPL display window, the **Request CPL** window displays a message that the CPL uploaded successfully.

Approved Attorney State

Select Closing Attorney

Get DocumentClose

Document Uploaded Successfully



View a CPL

After you generate a CPL, you can view it again from Attachments:

1. Select the **Shared** tab in the policy's **Order Product** view

ORDER PRODUCT > VIEW : Title Commitment - Refinance (Order:) -

Details Client Fee Summary Vendor Assignments Product Delivery **Shared** Action Items

Details

2. Select the **Attachments** tab

ORDER PRODUCT > VIEW : Title Commitment

Details Client Fee Summary Vendor As



Notes



Attachments

Forms

Search Criteria

NOTE: The CPL displays in the list of attachments.

Attachments							
<input type="checkbox"/>	Show Inactive Attachments						
	Type	File Type	Size(KB)	Description	Entered By	Date	
<input type="checkbox"/>	Closing Protection Letter	pdf	115	None - Document Id: 24645670	Bob Pellington (E)	08/01/2023 15:20:50	
<input type="checkbox"/>	Order Confirmation	pdf	57	Order Confirmation	Workflow	08/01/2023 15:12:01	

Click  to see details about the CPL attachment or click  to display the CPL PDF in a new window.

viewAttachmentJaf 1 / 5 100% + -

1

2

First American Title™

CLOSING PROTECTION LETTER
SINGLE TRANSACTION
First American Title Insurance Company

Addressee: [Redacted]

Date: 8/1/2023

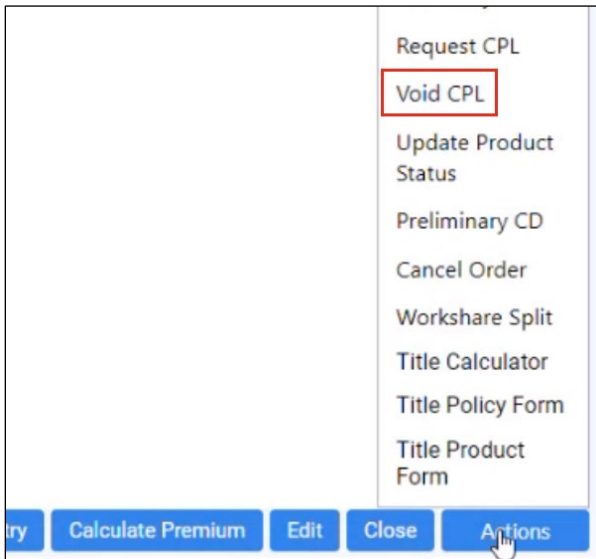
Settlement Service Provider: [Redacted]

Issuing Office's ALTA® Registry ID:



Void a CPL

1. On the Order Product view's **Details** tab click **Actions > Void CPL**



2. Enter the reason for voiding the CPL in the **Comments** field of the **Void CPL** window
3. Click **OK**

NOTE: A message displays in the bottom left confirming the CPL was voided.

