



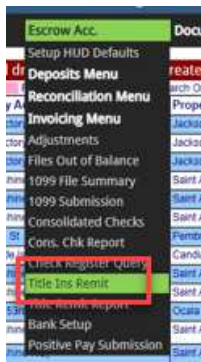
## E-Closing Bulk Remit & Policy Upload-Classic-V.3

Learn how to **Bulk Remit** and **Upload Policies** in E-Closing. This is to be utilized with the Classic version of E-Closing.

### Bulk Remit & Upload Process

From the Escrow Account Menu:

#### 1. Select Title Ins Remit



2. Select First American as the **Underwriter**
3. Adjust the **Remittance Type** to Bulk Remit and/or Bulk Upload

**NOTE:** Once the Bulk Remit option is selected, a new dropdown menu will appear for Credentials.

4. If you have only one Company in E-Closing, then your AgentNet username, State and Office ID will be defaulted automatically. If you have MORE than one Settlement Agency set up in E-Closing, select the appropriate **Credentials** from the dropdown menu for the office you wish to work with

#### 5. Click Start Remittance

**Title Insurance Remittance - E-**

| Window             | Select File                            | Escrow Acc. |
|--------------------|--|-------------|
| Underwriter        | First American Title Insurance Company | 2           |
| Remittance Type    | Bulk Remit and/or Bulk Upload          | 3           |
| Credentials        | tdemo_3-CT-18841616                    | 4           |
| Closing Date       | 02/18/2022 to 04/04/2022               |             |
| Start Remittance 5 |  |             |

**NOTE:** Once clicked, a list of files will appear that are ready to e-remit. Files that are not able to be remitted due to errors will display a Red Exclamation Point in the Remit Column.

|        |            |            |  |  |
|--------|------------|------------|--|--|
| 174.00 | 01/21/2022 | 02/25/2022 |  |  |
| 679.40 | 02/25/2022 |            |  |  |
| 861.20 | 02/25/2022 |            |  |  |

6. Scroll to the bottom of the list and select the **Remittance Validation Errors** button to review

! = File(s) that have failed the First American remittance validation. **Remittance Validation Errors**

7. Check off **files** to be included in the report to First American

**NOTE:** The totals on the left-hand side of the report will update with your Premium Total, Commission Total, Underwriter Net and File count. You can utilize the **Check All Remits** buttons at the top of the screen to check all remits or check all uploads. You may also check the Check All Uploads option to upload schedules at the same time.

| Image Uploaded | Upload | Remit Date | Remit |
|----------------|--------|------------|-------|
| 2021           |        |            |       |
|                |        |            |       |
|                |        |            |       |
|                |        |            |       |

8. Once files are selected, scroll to the bottom of the list, and select the **Submit Bulk Remittance and Upload** button

**Submit Bulk Remittance and Upload**

9. From the confirmation window popup, **confirm your totals** and add any applicable Notes in the **Comment** section
10. Click **Submit**

Remit and Upload Policy

First American Title™

File Remittance and Upload

|                        |           |
|------------------------|-----------|
| Total Remits Selected  | 2         |
| Total Uploads Selected | 2         |
| Total Premium          | 6,071.00  |
| Total Commission       | 4,014.00  |
| Total Underwriter Net  | 1,822.15  |
| Total Due              | 1,822.15  |
| Comment (0 of 100)     | 9         |
| Cancel                 | Submit 10 |



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## NOTES:

- A popup screen will appear to confirm that the process is complete.



- A new tab will also appear containing the **Transmittal Sheet** for the files. It will be saved in the Documents area for each file. This sheet can be printed out to mail with the checks to First American.
- On the **Title Insurance Remittance** screen, any files that were uploaded with Policies will have a date in the Remit Column. The Remit Checkbox will be removed, but you can continue to utilize this screen to upload additional policies for the same files using the Upload checkbox.
- Any files that were uploaded will have a date in the **Upload Date** column.
- Any files that were remitted will have a date in the **Remit Date** column.