Job Aid: eRemit and Upload Policies in ClosingVue™

Learn how to electronically report First American Title Policy premiums and CPL fees on individual files using the ClosingVue integration with AgentNet®. Then learn to upload policy images via the Policy Upload feature within your E-Closing file, without having to navigate to AgentNet.
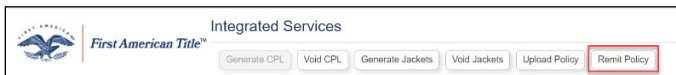
Prerequisites to E-Remittance

The following activities must be completed in E- Closing to electronically report on files:

- You must have the **Remittance Rights** in AgentNet assigned to your user profile.
- You must generate a policy(ies)
- You must have **Calculated Premiums** on your file in order to remit. Please refer to the appropriate job aid on **Calculating Premiums**.
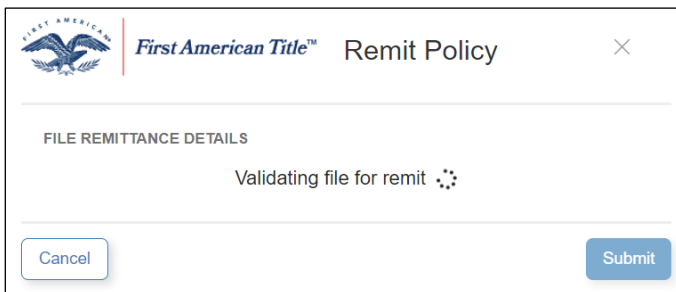
E-Remittance

Beginning from an existing file in Closing Vue:

1. In the Title Policy screen, click **Remit Policy**

NOTE: In the new window, Closing Vue will validate that your file is ready for remittance.

2. Verify the displayed information in the **Remit Policy** window

3. Click **Submit**

NOTE: A message states remittance was submitted successfully.

NOTE: Policy premiums are reported to AgentNet and a "**Payment Transmittal Form**" is generated on screen. The Payment Transmittal Form is also available in the **Document Management** screen within the **Scanned/Saved Documents** section.
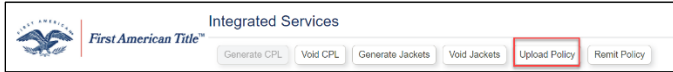
NOTE: All of the other integration buttons on the **Title Policy** screen will now be disabled other than **Upload Policy**.

Upload Policy Documents

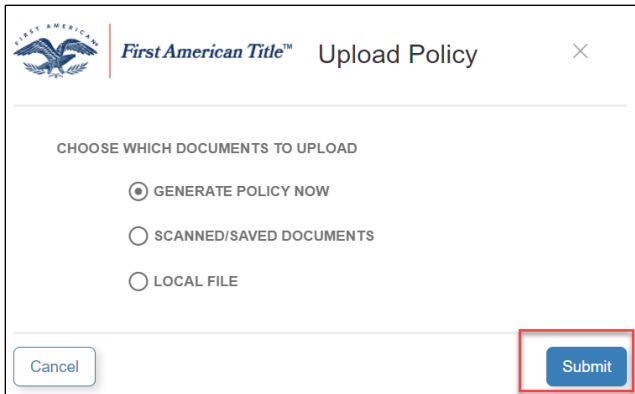Follow the steps below to upload your policy schedules in First American.

1. In the **Title Policy** screen, click **Upload Policy**

2. In the **Upload Policy** window, select a document upload option: **Generate Policy Now**, **Scanned/Saved Documents** or **Local File:**
   A. **Generate Policy Now:** Creates a Title Policy in E-Closing and AgentNet.
   B. **Scanned/Saved Documents:** Allows you to upload Schedules and CPLs you have created for your File.
   C. **Local File:** Allows you to browse your computer to upload a Policy document from a stored location.

3. Click **Submit**

NOTE: A message displays to show policy documents were uploaded successfully.

4. Click **X** to close **Informational Message**

Frequently Asked Questions

Why is my CPL fee missing from the Remit Policy window?

Your CPL fee is being captured as a Title Fee and not as a premium. It is still reflected in your CD. Do not change CPL fee description in your file as this may result in an accounting error.

Why can't I upload a Local File from my computer?

The Local File upload option is not available if using Internet Explorer as your browser. Closing Vue does not recommend using Internet Explorer. Chrome or Firefox are the recommended browsers.