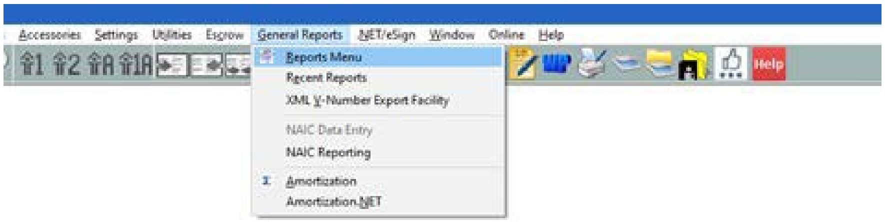
Landtech Policy and Remittance Reports

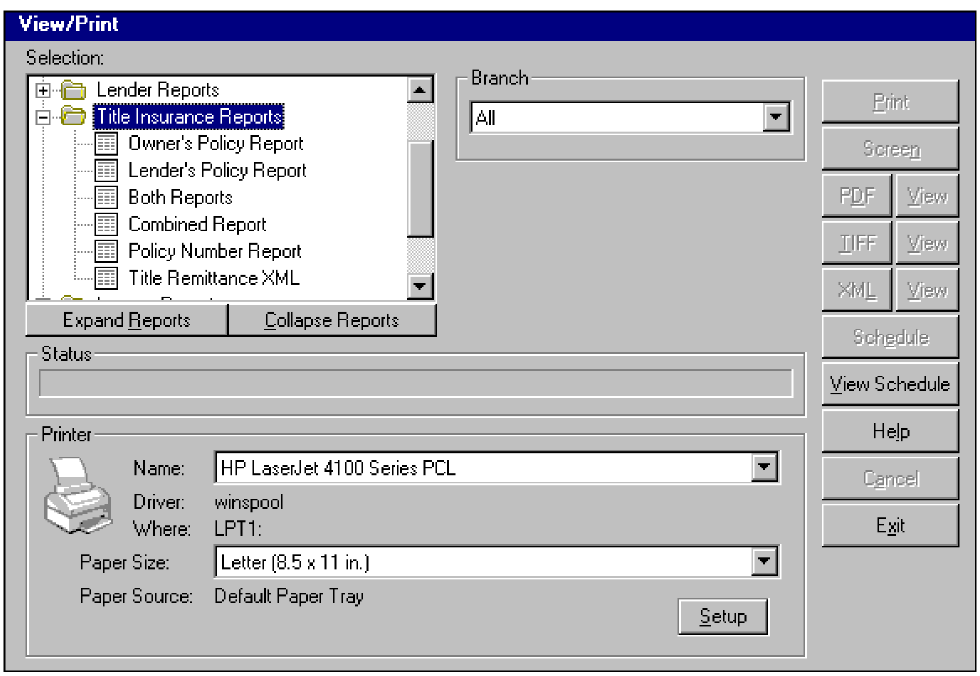
You can access the reports from General Reports on the top menu bar. Then Select Reports Menu



These reports are designed to show the issuance of Title Insurance policies. The accuracy of these reports depends on the proper updating of each closing file when the policy is issued. The ***Title Insurance Policy Issued*** check box on the ***1108 Title Insurance*** dialog box must be checked and an issue date entered in the ***Issue Date*** text box. The issue date is one of the parameters for date used by the report to determine which files had policies issued during a specific date range. The other parameter is the settlement date. These reports will subtotal on policies issued and not issued. Endorsements associated with the policies are also included.

To print the Title Insurance Reports:

- Double-click on ***Title Insurance Reports*** to expand the list of reports. You can also click Expand Reports or press **ALT + R** to expand the report list.



- Each of the Title Insurance reports can be run by branch location. Notice that there is a drop-down list to select the branch.

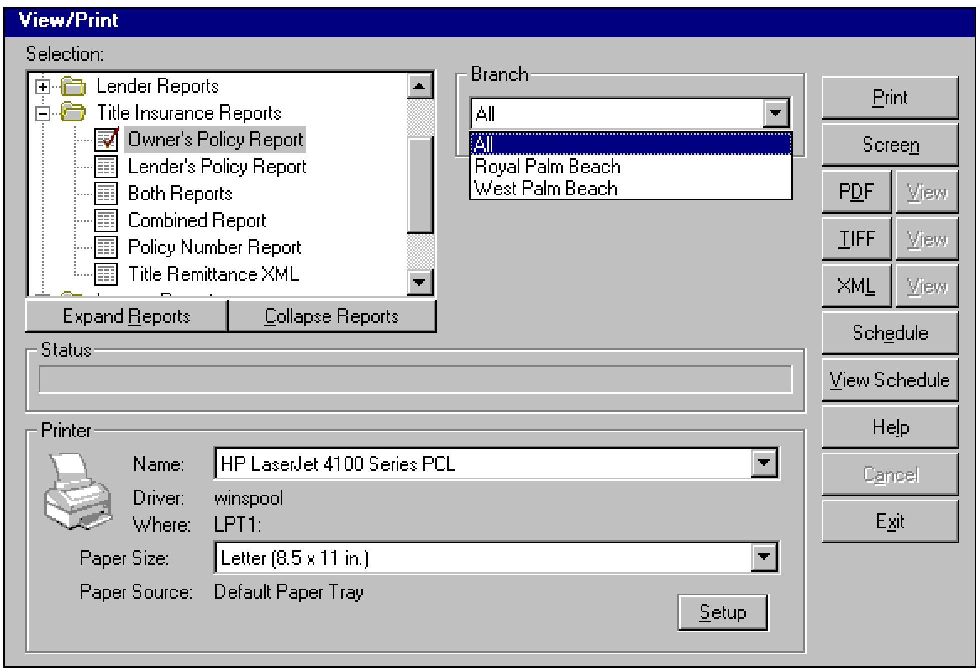
- Select the report you wish to run.

Owner's Policy Report

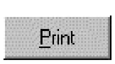
The Owner's Policy Report will show only owner's policies that have been issued or need to be issued

- Click on ***Owner's Policy Report*** in the ***Selection*** list box.

- The default selection for branch is ***All***. If you want to run the report for a particular branch, select the branch by clicking the down arrow  on the ***Branch*** drop-down list box. All branch locations initialized in your system will be displayed.



- Click on the desired branch location.

- Click 

or press ALT + P to print the report to the printer.

- Click 

or press ALT + N to display the report to the screen.

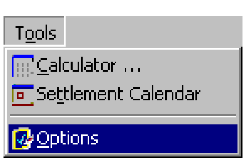
- The report options dialog box will be displayed.

- This report can be run for all underwriters or a specific underwriter. ***Use All Records*** is selected by default. This means all underwriters will be included in the report.

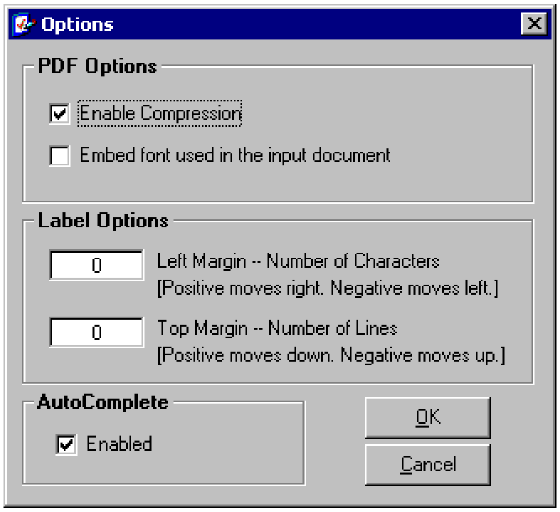
- Click on the ***Use Selected Record*** option button if you want to run the report for a specific underwriter. The report will be for one underwriter of your choice only. When you click on the ***Use Selected Record*** option button, the cursor will be positioned in the ***Use Selected Record*** text box.

- The program has a feature called ***AutoComplete***. If you start typing an underwriter's name, the program will attempt to match and display the remainder of the name.

- ***AutoComplete*** is an option that can be turned off if you do not want the program to do this. To disable it, click on ***Tools*** on the menu bar or press ALT + O. The ***Tools*** drop-down menu is displayed.



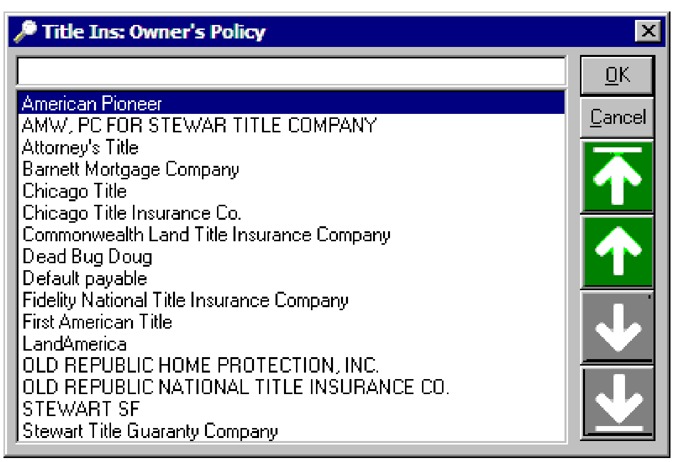
- Click on O***ptions*** or press O. The ***Options*** dialog box is displayed.



- Uncheck the ***Enabled*** check box to disable the ***AutoComplete*** feature.

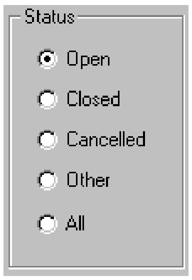
- Click OK or press ALT + O to return to the ***View/Print*** dialog box.

- If you would prefer to browse for the underwriter's name, click to display a list of all underwriters in the system.

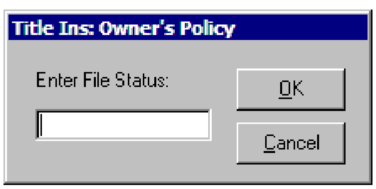


- Either type the first few letters of the underwriter's name in the text box or use the navigation buttons to locate the desired underwriter. Select the underwriter's name by either double-clicking on it or by clicking once on it and then clicking OK or pressing ALT + O.

- You can specify the file status to include in the report. This selection depends on you updating the ***File Status*** field on the ***Business Sources*** tab in the ***HUD Page 1 General Information*** dialog box. If you have not been using this field, then you will only be able to get a valid report by selecting ***All***. Make the desired selection.



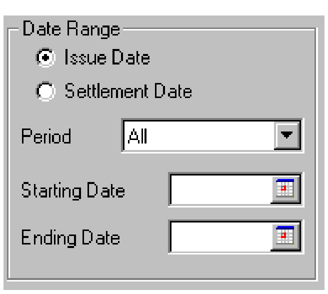
- If you select ***Other***, you will be prompted to enter a file status.



- This allows you to do the report on the specific file status that you have defined for ***Other***. You may have defined several different codes that all fall under the ***Other*** category. This allows you to report on each separately.

- Enter the status and click  or press ALT + O to continue.

- You have the choice of running this report by the issue date of the policy or the settlement date of the transaction. If you want to use the issue date, you must have an entry in the ***Issue Date*** text box on the ***1108 Title Insurance*** dialog box in the closing file for the policy to be included.



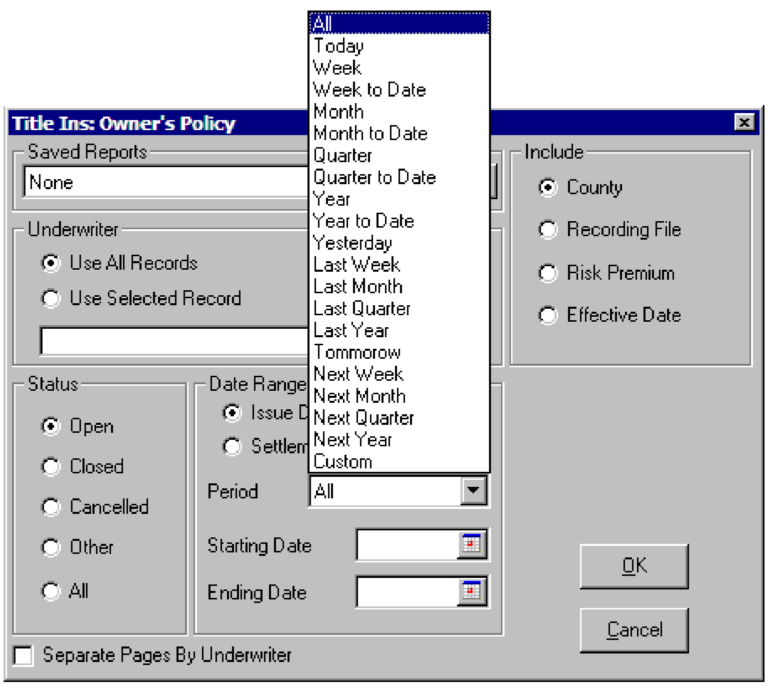
- If you run the report by settlement date, it will list all files, issued or not. This is the way to get an overall view of your policy situation. You will see all policies that have been issued and all policies that remain to be issued for a particular underwriter.

- If you run the report by issue date, the report will only list files that have had policies issued. This is the way you would run the reports for the monthly reporting to the underwriter.

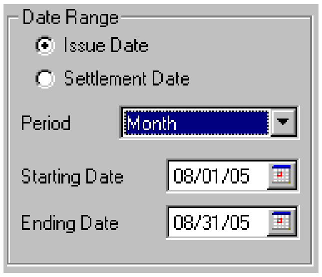
- Select either ***Issue Date*** or ***Settlement Date*** by clicking on the appropriate option button.

- You can specify a date range for the report. You can easily specify a date range by selecting a period. The default period is ***All*** which means no date range is specified.

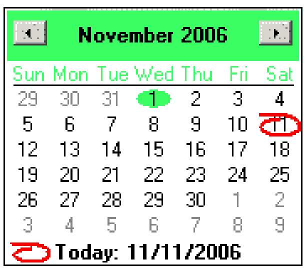
- Click on the down arrow next to the ***Period*** text box to display a list of the periods.



- As you can see, there are many different periods you can select. Click on the desired period to select it. The dates will automatically be entered into the ***Starting Date*** and ***Ending Date*** fields.



- If you do not select a period, you can use the pop-up calendar to assist you in selecting a date. Click on the calendar icon to display the pop-up calendar.



- Click on the arrows to move from month to month. The current date has a red circle around it. The date currently selected is highlighted in color. Select the desired date by clicking on it.

- You can also enter the starting and ending dates manually.

- It is not necessary to specify both a starting and ending date. You can specify a starting date and no ending date or an ending date without a starting date. Or you can leave them both blank if you do not want a date range for the date type selected. If you do not specify a date range, the report will contain all files ordered by the date type selected.

- This report has a user defined element to it in that you can decide what columns of information the report will include. You can choose one of three additional columns for this report.

- Selecting ***County*** will include the name of the county where the property is located.

- Selecting ***Recording File*** will show the name of the recording file that was selected in the closing file.

- Selecting ***Risk Premium*** will show the risk rate associated with the title insurance premium charged.

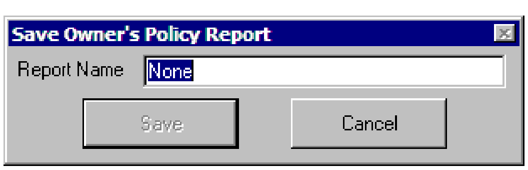
- Selecting ***Effective Date*** will show the effective date of the policy.

- Select the information that you want included in the report by clicking on the appropriate option button.

- If you are running the report for all underwriters and you would like each underwriter to print on a separate page, make sure the ***Separate Pages by Underwriter*** check box is checked.

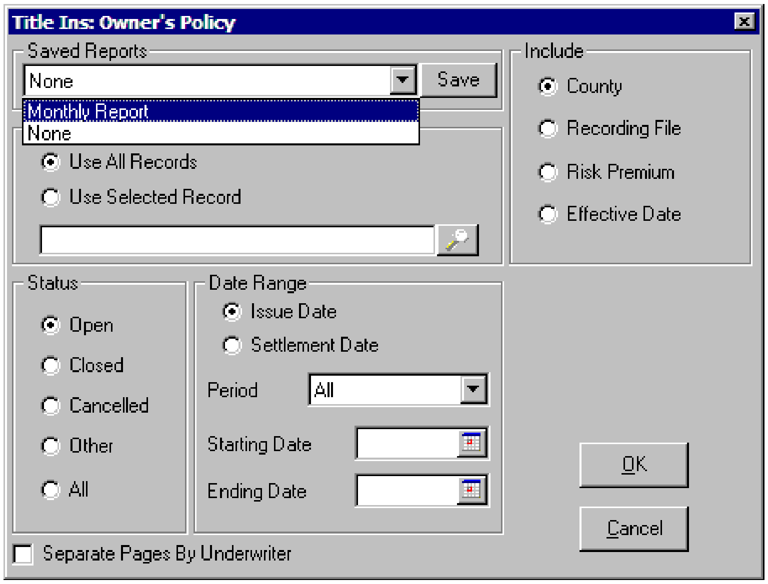
- You can save the selections for the report so that you can run the report again with the same selections without having to reselect each item.

- Click  to save the report. The following dialog box will be displayed.



- Enter a name for the report and click  .

- This report can then be selected from the ***Saved Reports*** drop-down list any time you run an Owner's Policy Report.

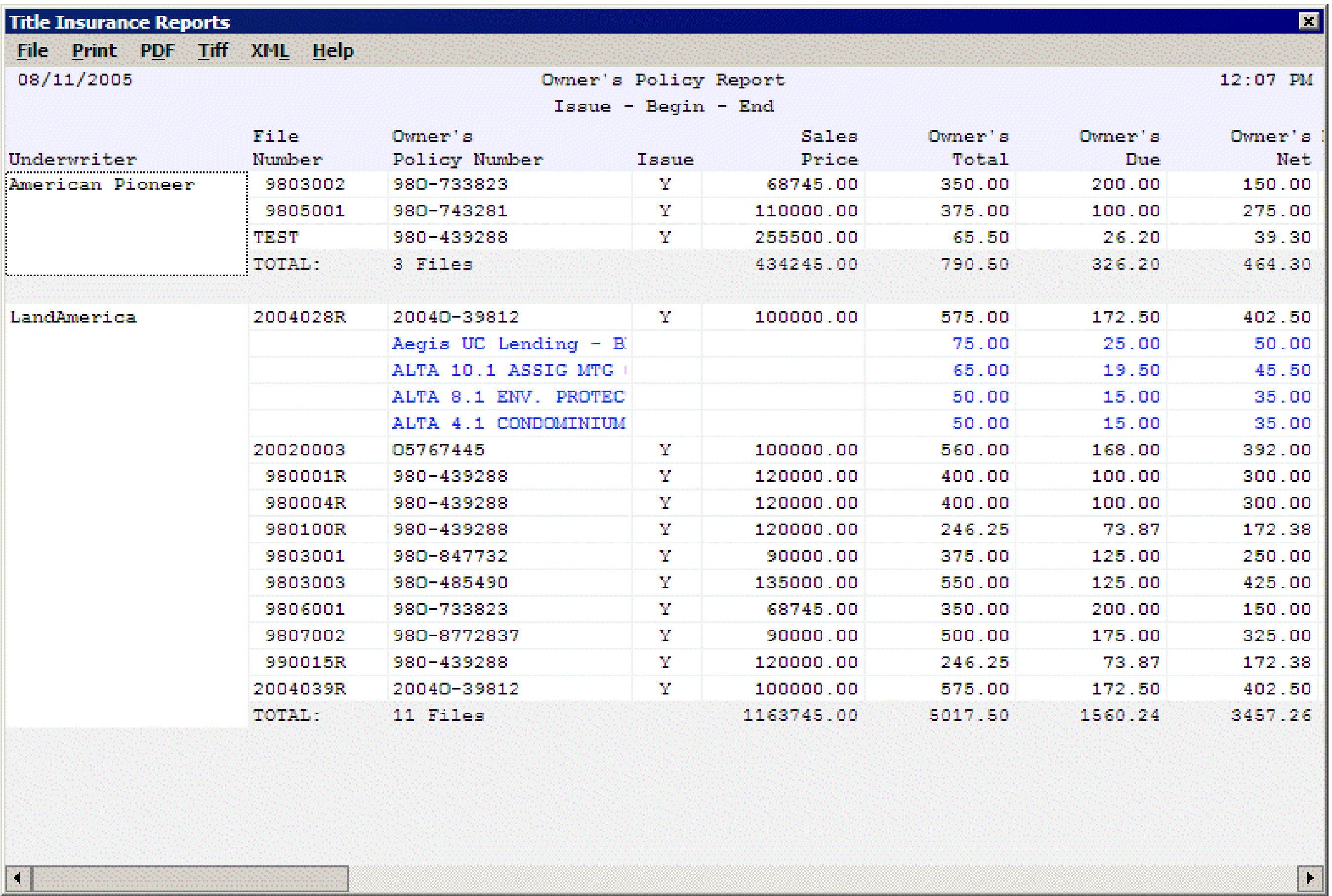


- Saved reports can be deleted from the drop-down list by selecting the report and pressing the Delete key.

- If you have saved reports and want to run one of them, select it from the the ***Saved Reports*** list. All report selections will be set automatically.

- Click  or press ALT + O to start the report.

The following is an example if the Owner's Policy Report displayed to the screen.



Title Insurance Reports

File Print PDF Tiff XML Help

08/11/2005 Owner's Policy Report 12:07 PM

Issue - Begin - End

Underwriter	File Number	Owner's Policy Number	Issue	Sales Price	Owner's Total	Owner's Due	Owner's Net
American Pioneer	9803002	980-733823	Y	68745.00	350.00	200.00	150.00
	9805001	980-743281	Y	110000.00	375.00	100.00	275.00
	TEST	980-439288	Y	255500.00	65.50	26.20	39.30
	TOTAL:	3 Files		434245.00	790.50	326.20	464.30
LandAmerica	2004028R	2004O-39812	Y	100000.00	575.00	172.50	402.50
		Aegis UC Lending - B			75.00	25.00	50.00
		ALTA 10.1 ASSIG MTG			65.00	19.50	45.50
		ALTA 8.1 ENV. PROTEC			50.00	15.00	35.00
		ALTA 4.1 CONDOMINIUM			50.00	15.00	35.00
	20020003	05767445	Y	100000.00	560.00	168.00	392.00
	980001R	980-439288	Y	120000.00	400.00	100.00	300.00
	980004R	980-439288	Y	120000.00	400.00	100.00	300.00
	980100R	980-439288	Y	120000.00	246.25	73.87	172.38
	9803001	980-847732	Y	90000.00	375.00	125.00	250.00
	9803003	980-485490	Y	135000.00	550.00	125.00	425.00
	9806001	980-733823	Y	68745.00	350.00	200.00	150.00
	9807002	980-8772837	Y	90000.00	500.00	175.00	325.00
	990015R	980-439288	Y	120000.00	246.25	73.87	172.38
	2004039R	2004O-39812	Y	100000.00	575.00	172.50	402.50
	TOTAL:	11 Files		1163745.00	5017.50	1560.24	3457.26

- Notice that the menu bar now has selections for P***rint***, ***P***DF, T***IFF*** and ***XM***L. This enables you to print the report to the printer, to a PDF or TIFF file, or to an XML file without going back to the ***View/Print*** dialog box.

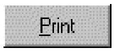
- Click ☒ to close the report.

Lender's Policy Report

The Lender's Policy Report will show only loan policies that have been issued or need to be issued.

- Click on ***Lender's Policy Report*** in the ***Selection*** list box.

- Select a branch location if desired.

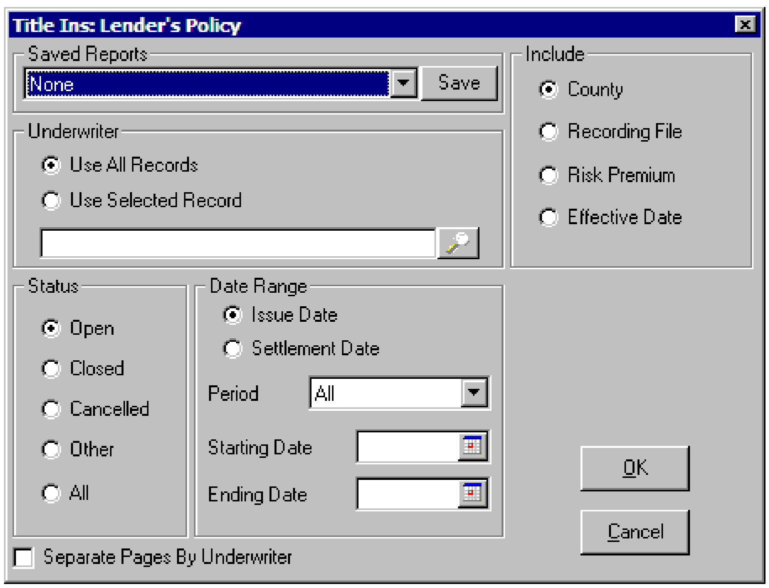
- Click 

 or press ALT + P to print the report to the printer.

- Click 

 or press ALT + N to display the report to the screen.

- The report options dialog box will be displayed.



- The options for this report are the same as the ***Owner's Policy Report*** previously discussed. Refer to the Owner's Policy Report if you need to review how to select the options.

- Click 

 or press ALT + O and the report will begin.

Both Reports

This report will print both the Owner's and the Lender's Policy reports in succession.

- Click on ***Both Reports*** in the ***Selection*** list box.

- Select a branch location if desired.

- Click Print or press ALT + P to print the report to the printer.

- Click Screen or press ALT + N to display the report to the screen.

- The report options dialog box will be displayed.

- The options for this report are the same as the Owner's Policy Report previously discussed. Refer to the Owner's Policy Report if you need to review how to select the options.

- Click OK or press ALT + O and the report will begin.

Combined Report

The Combined Report will list the Owner's and the Lender's policies for each file together instead of separately as in the previous title insurance reports.

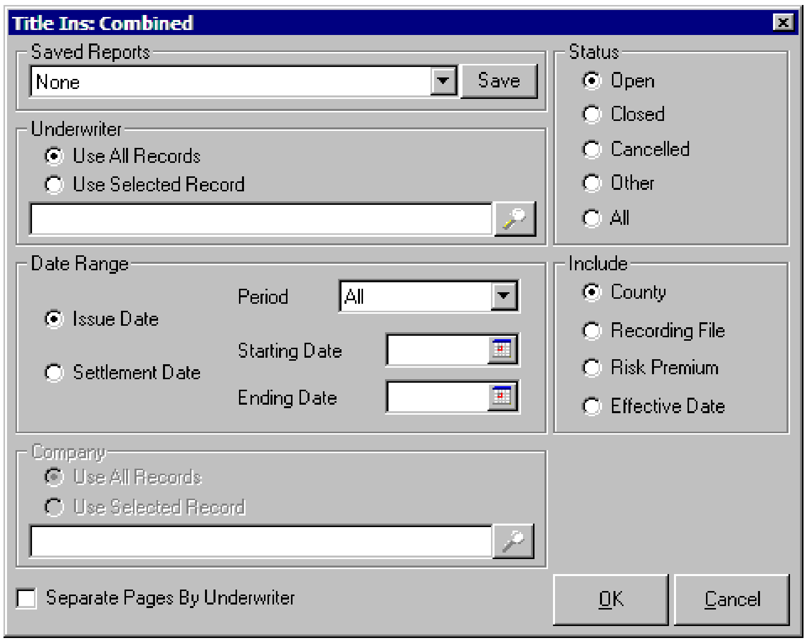
- Click on ***Combined Report*** in the ***Selection*** list box.

- Select a branch location if desired.

- Click Print or press ALT + P to print the report to the printer.

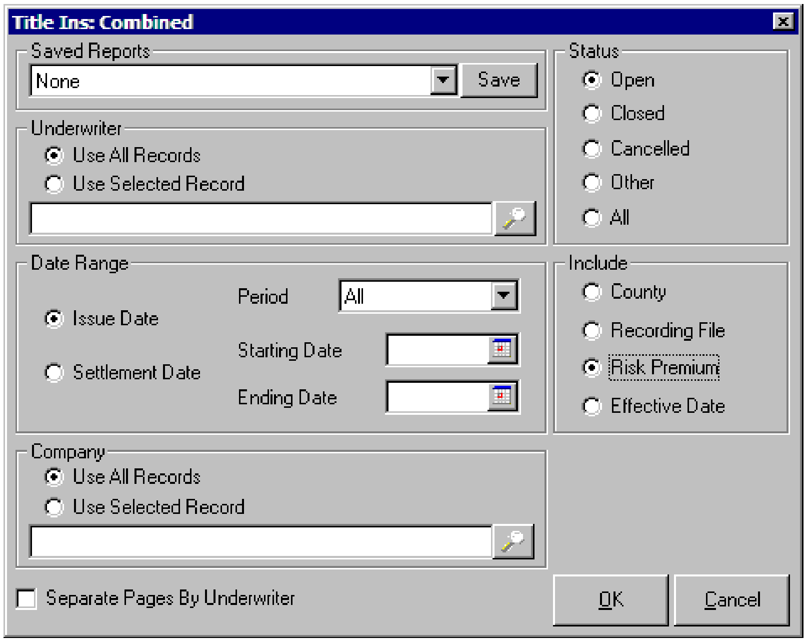
- Click Screen or press ALT + N to display the report to the screen.

- The report options dialog box will be displayed.



- The options for this report are the same as the Owner's Policy Report previously discussed. Refer to the Owner's Policy Report if you need to review how to select the options.

- The Combined Report has one additional option. If you select ***Risk Premium*** as the additional column of data to include in the report, you will be given the opportunity to have the risk rate information broken down by company if you have more than one company initialized in your system.

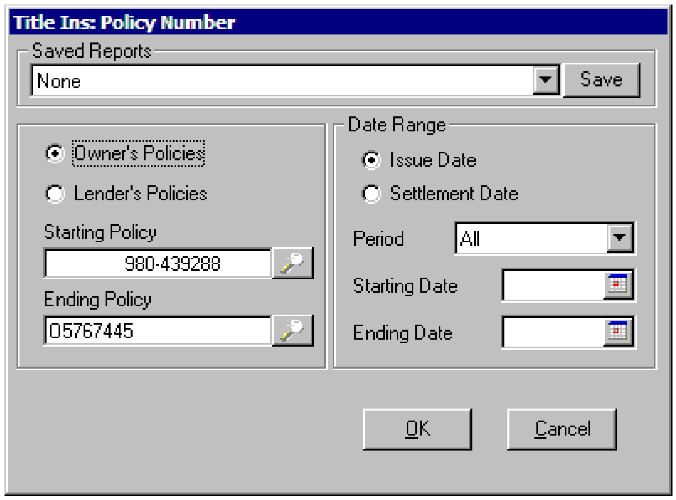


- Click OK or press ALT + O and the report will begin.

Policy Number Report

The Policy Number Report will list the issued policies in policy number order.

- Click on ***Policy Number Report*** in the ***Selection*** list box.
- Select a branch location if desired.
- Click Print or press ALT + P to print the report to the printer.
- Click Screen or press ALT + N to display the report to the screen.
- The report options dialog box will be displayed.

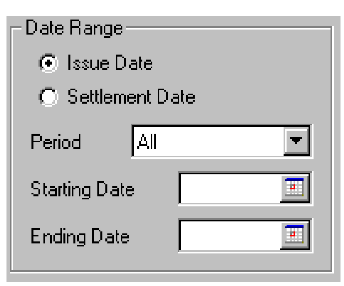


- Select either Owner's or Lender’s policies for the report by clicking on the appropriate option button.

- Select the starting and ending policies for the report. The entries shown in the ***Starting Policy*** and ***Ending Policy*** list boxes are the policy numbers assigned to the policies and not the filenames or numbers assigned to the closing files. The ***Starting Policy*** list box defaults to the first policy number in the system and the ***Ending Policy*** list box defaults to the last policy number in the system.

- If you want to select different starting and ending policy numbers, click to display a list of all policy numbers. Select the desired policy number.

- You have the choice of running this report by the issue date of the policy or the settlement date of the transaction. If you want to use the issue date, you must have an entry in the ***Issue Date*** text box on the ***1108 Title Insurance*** dialog box in the closing file for the policy to be included.



- Select either ***Issue Date*** or ***Settlement Date*** by clicking on the appropriate option button.

- You can specify a date range for the report. You can easily specify a date range by selecting a period. The default period is ***All*** which means no date range is specified.

- Click on the down arrow next to the ***Period*** text box to display a list of the periods. Click on the desired period. The starting and ending dates for the period will be inserted automatically.

- It is not necessary to specify both a starting and ending date. You can specify a starting date and no ending date or an ending date without a starting date. Or you can leave them both blank if you do not want a date range for the date type selected. If you do not specify a date range, the report will contain all files ordered by the date type selected.

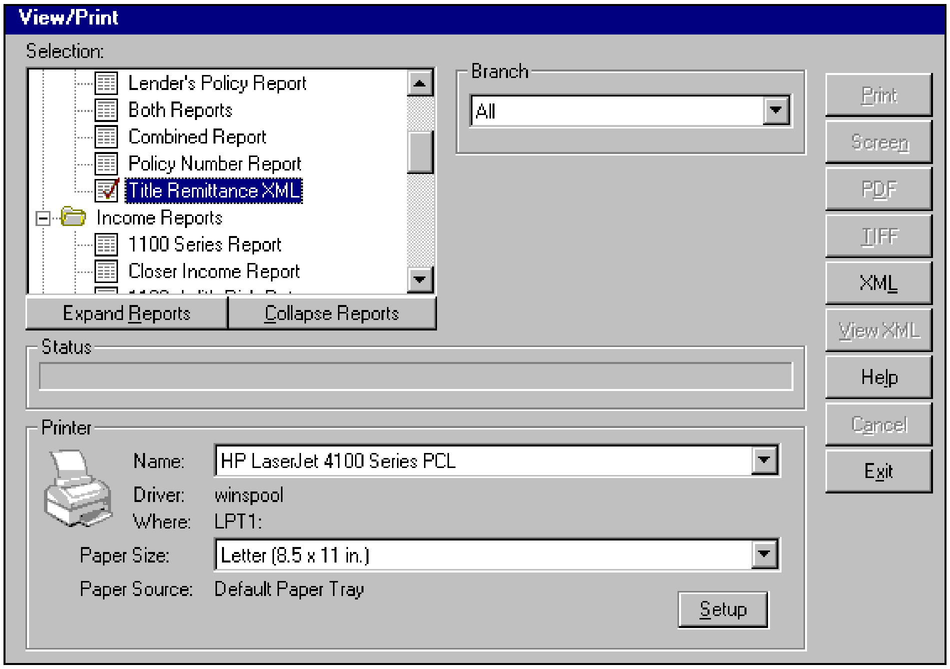
- Click OK or press ALT + O and the report will begin.

Title Remittance XML

The Title Remittance XML report is a policy report that is written directly to an XML file. Using this report enables you to report policy information to your underwriter electronically. The underwriter would be able to import the policy information directly from the XML file into their system eliminating the need to manually enter the data.

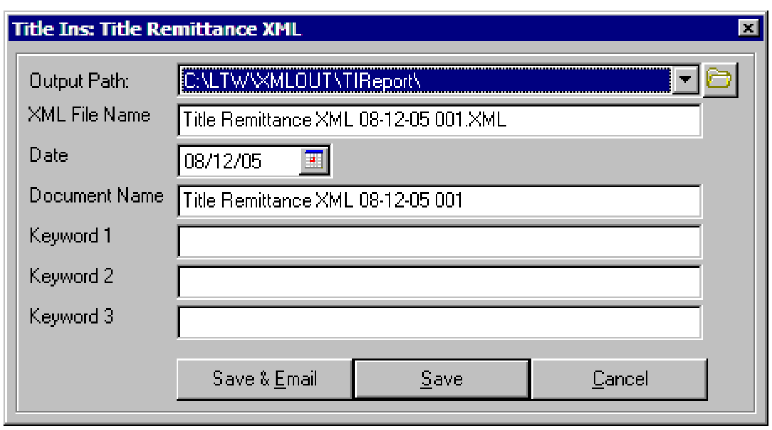
- Click on ***Title Remittance XML*** in the ***Selection*** list box.

- Select a branch location if desired.



Notice that only the XML button is active. This is because this report cannot be printed. The only output is to an XML file.

- Click  or press ALT + L. The following dialog box will be displayed.



If you have installed ***Landtech Digital Manager with eSign***, every document printed to an XML file from ***Landtech XML*** is automatically added to ***Digital Manager***. You will need to enter some necessary information for this purpose. If you do not have ***Landtech Digital Manager with eSign*** installed, the ***Date***, ***Document Name***, and ***Keyword*** fields are not necessary and therefore not accessible.

Output Path: This is the location on the hard drive where the XML file will be stored. The program suggests a location to store the file. However, you can change the path if necessary. If you would prefer to store the file in a different location:

- Click on the down arrow next to the ***Output Path*** text box. A drop-down list will display every location that XML files have been saved to. If this list contains a suitable location, click on it.

- If the drop-down list doesn't contain the location that you want, click on the folder icon next to the drop-down arrow to browse for the desired location.

XML Filename: This is the filename that will be assigned to the XML file. The filename will default to a name that consists of the report name, the date, and the number of times that the same report has been printed on that date. If you print the report more than once during the same day, the number at the end of the filename will increment by one each time. You can change the filename if you want. If you prefer a different filename:

- Click on the ***PDF Filename*** textbox and enter a new filename.

Note: If you have the option in S***ettings*** called ***Use DOS 8.3 Filenames for PDF/TIFF Output*** set to ***Yes***, you will not see a long filename as in the example above. The filename will be reduced to a DOS 8.3 filename.

Date: ***Landtech Digital Manager*** uses a reference date to aid in locating a file. Each file that is added to ***Digital Manager*** will have a reference date associated with it. The date will default to the system date. You can change the date if you want. If you prefer a different date:

- Click on the ***Date*** text box and enter a new date. Enter the date in MM/DD/YY format. You can also click to select a date from the ***Landtech XML*** calendar.

Document Name: ***Landtech Digital Manager*** allows you to give the report a name in addition to the actual filename it is stored under on your computer. This document name will be how it appears in ***Digital Manager***. The document name will default to the report that you are printing. You can change the document name if you want. If you prefer a different document name:

- Click on the ***Document Name*** text box and enter a new name.

Keywords: ***Landtech Digital Manager*** uses keywords that are assigned to files to aid in locating a file. Up to three keywords can be assigned to a file. It is not necessary to assign keywords, however, it is recommended. You do not have to assign three keywords. One or two is acceptable as well.

- Enter one or more keywords in the fields provided by clicking on the appropriate text box and entering the keyword.

- When you have finished entering all of the information in the dialog box, click Save or press ALT + S to begin printing to the XML file.

- You can cancel this process and return to the ***View/Print*** dialog box by clicking Cancel or pressing ALT + C.

- If you would like to immediately email the XML, click Save & Email or press ALT + E. Microsoft Outlook will open at the end of the process with the XML file already attached. All you need to do is enter the email address of the recipient, enter a message if necessary, and send.

Note: If you do not have Microsoft Outlook installed on your computer, the ***Save &*** E***mail*** button will not be visible.