ePolicy Manager®
User Guide

The Fund ALWAYS DRIVEN™

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ePolicyManager was created for Fund members who **do not** use DoubleTime as their closing software; but would like the convenience of receiving their Old Republic commitment and serialized policy jackets electronically. **ePolicyManager** users have the added benefit of generating a Rating Worksheet which can be printed or saved electronically for their records. Additionally, when final policy schedules are complete and ready for submission to The Fund, users can upload final policy schedules through **ePolicyManager** and a remittance invoice is generated.

There are two tasks which can be completed in **ePolicyManger**; **Creating a New File** and **Searching Existing File(s)** this User Guide will review both tasks.

Logging into The Fund website (Step 1)

1. Log into www.thefund.com, in the **Launch Center** select the **ePolicyManager Launch App** link.

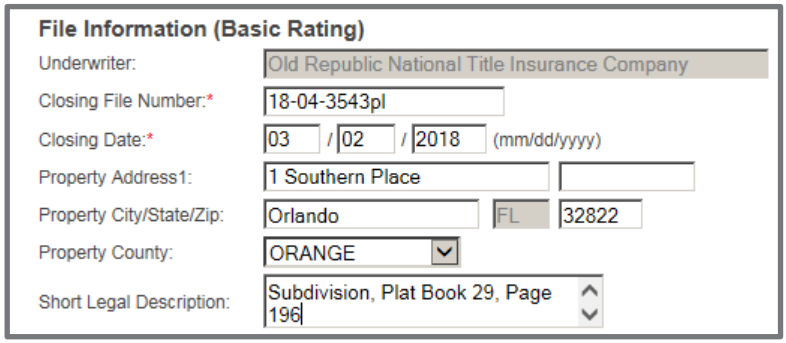
Creating a New File (Steps 2 – 3)

2. Select the **Create New File** link.

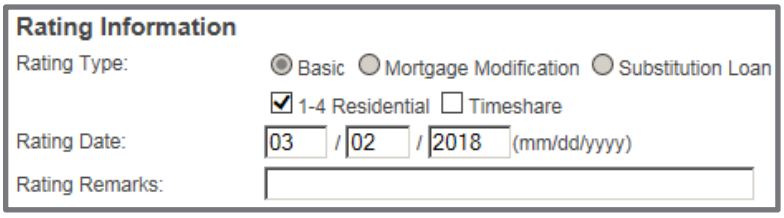
3. Select the appropriate branch location (if applicable) for your firm or title agency and select the **Submit** button at the bottom of the screen.

Generating a Commitment Jacket (Steps 4 – 17)

4. Enter general file details in the **File Information (Basic Rating)** section. Required fields are denoted with an (*) asterisk.



5. **Rating Information** entered at this location will populate onto the **Rating Worksheet**.



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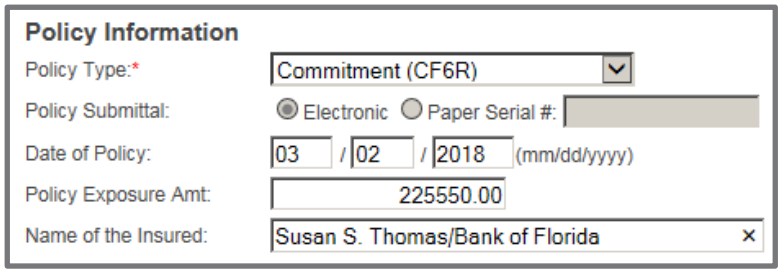
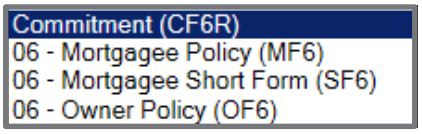
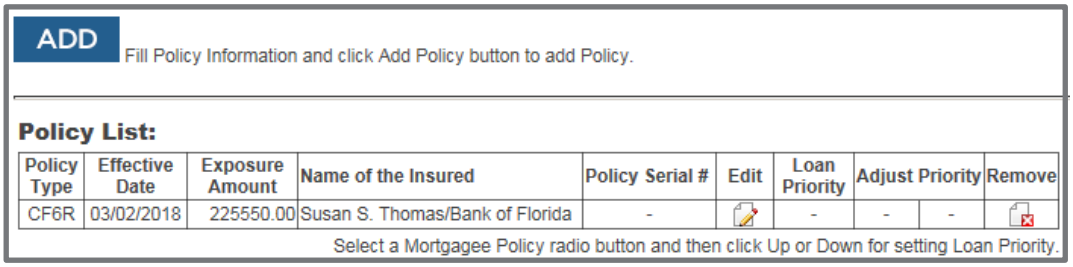
6. The **Rating Type** default is **Basic**; advanced rating options of **Mortgage Modification** and **Substitution Loan** are also available. If additional assistance is needed with rating options contact Finance Customer Service at 800-275-2843.
7. The **Rating Date** entered at this location can is at the user's discretion.
8. Information entered in **Rating Remarks** will populate onto the **Rating Worksheet**, this is an optional field.
9. **Policy Information** is the location to select the policy type and enter basic information prior to generating the commitment jacket.



10. Select the **Policy Type** drop down and select the appropriate option.



11. The **Policy Submittal** option button defaults to **Electronic** and is unavailable for change.
12. In the **Date of Policy** field enter the effective date of the commitment; or when requesting policy jackets enter the recording date of the insured document (i.e. Warranty Deed or Mortgage).
13. The **Policy Exposure Amt.** field is the location to enter the proposed insured amount for the commitment or the insured amount for the policy.
14. In the **Name of the Insured** field enter the name of the proposed insured for the commitment or the name of insured for the policy.
15. Select the **ADD** button to add the commitment or policy information to the **Policy List**.



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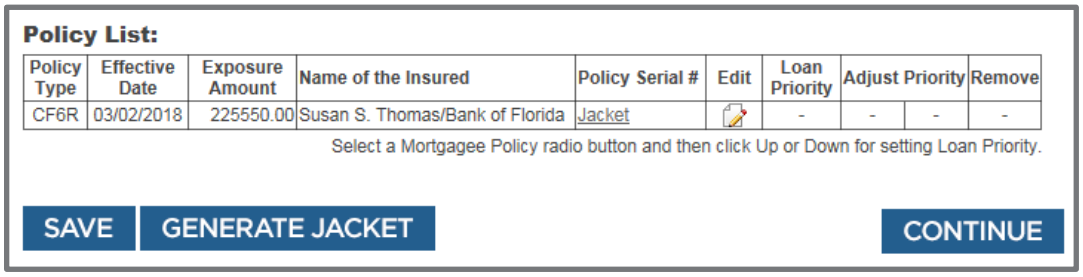
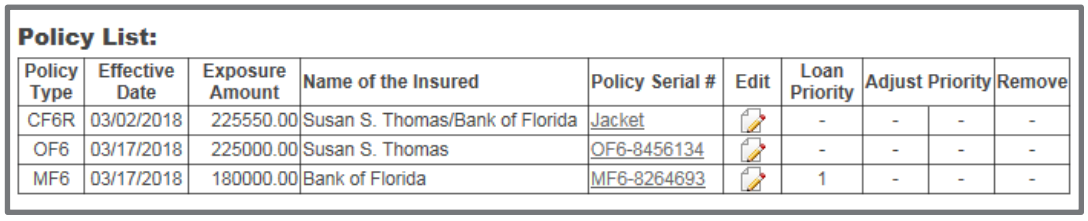
16. To delete commitment or policy information from the **Policy List** *prior to* selecting the **Generate Jacket** button select the **Remove** button.

17. Select the **Generate Jacket** button to generate the commitment or policy jacket; select the link located in the **Policy Serial #** field to view the jacket. Note: To cancel a policy jacket write void across the front of the policy jacket and email a copy to epolicycancellation@thefund.com.



Generating a Policy Jacket (Step 18)

18. Repeat steps 10 through 17 to generate policy jackets (i.e. Owners or Mortgagee)

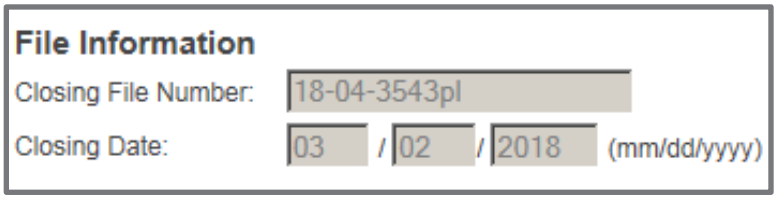


Rating a File (Steps 19 – 27)

19. To move to the next screen select the **Continue** button at the bottom of the screen *or* scroll to the top of the screen and select the **Rating** link.

20. Complete the **Rating** section of **ePolicyManager** to calculate the policy rating and remittance amounts for the transaction; once completed users can print a **Rating Worksheet**.

21. The fields containing **File Information** populate and are unavailable for change.



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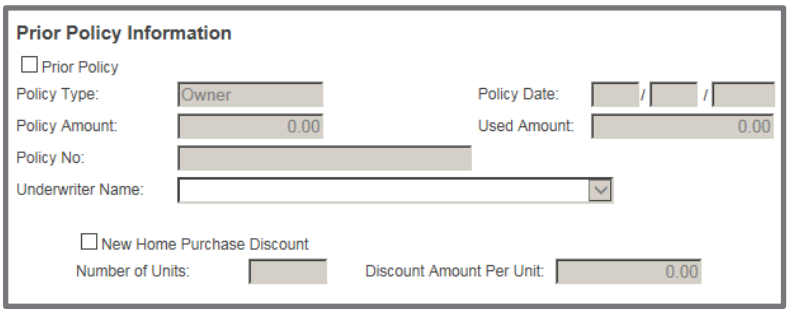
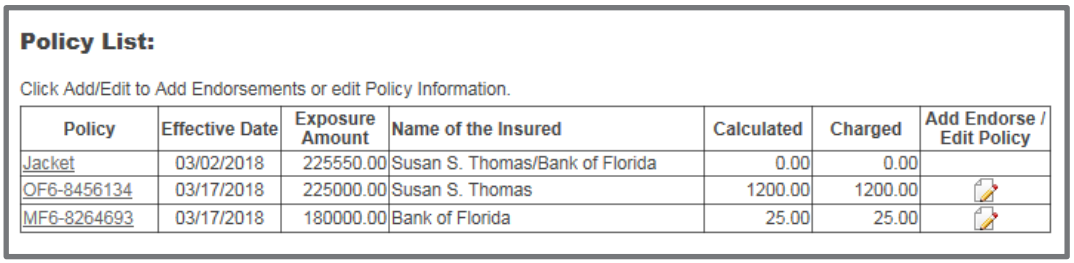
22. If the transaction qualifies for a reissue rate and a copy of the Owner's Title Insurance Policy is obtained, select the **Prior Policy** check box and enter the **Prior Policy Information**. If applicable, select the **New Home Purchase Discount** check box and enter appropriate information. **ePolicyManager** will calculate the reissue rate based on information entered in the **Prior Policy Information** section. Reissue rates will display on the **Policy List** and on the **Rating Worksheet.**



23. In the **Policy List** select the applicable **Add Endorse/Edit Policy** button to add endorsements to the Owner's policy or Mortgagee policy.

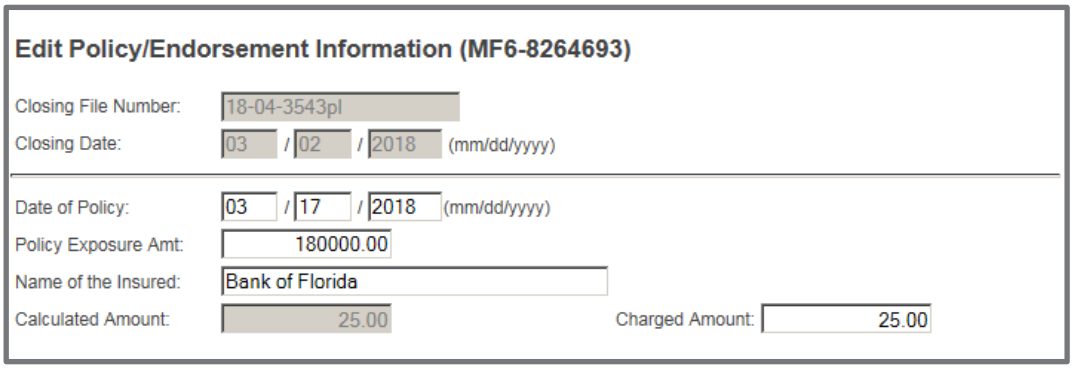


Policy List:

Click Add/Edit to Add Endorsements or edit Policy Information.

Policy	Effective Date	Exposure Amount	Name of the Insured	Calculated	Charged	Add Endorse / Edit Policy
Jacket	03/02/2018	225550.00	Susan S. Thomas/Bank of Florida	0.00	0.00	
OF6-8456134	03/17/2018	225000.00	Susan S. Thomas	1200.00	1200.00	
MF6-8264693	03/17/2018	180000.00	Bank of Florida	25.00	25.00	

24. The **Edit Policy/Endorsement Information** screen displays; users may edit the **Date of Policy**, **Policy Exposure Amt.**, **Name of the Insured,** and **Charged Amount** fields, if needed.



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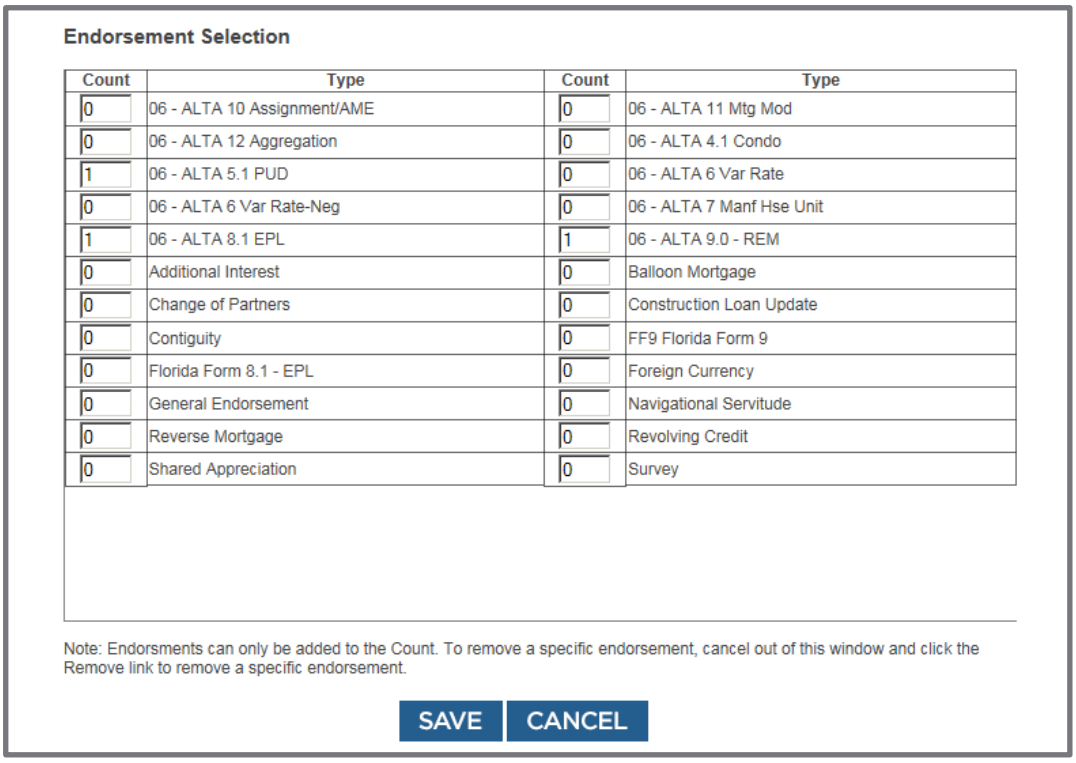
25. To add an endorsement to a policy, in the **Endorsement Selection** section enter the number **1** next to the required endorsement. After all endorsements have been added, select the **Save** button at the bottom of the screen to return to the **Rating** screen. Note: Endorsements can only be added to the count at this location. To remove an endorsement, select the **Cancel** button to return to the **Rating** screen and click the **Remove** link.



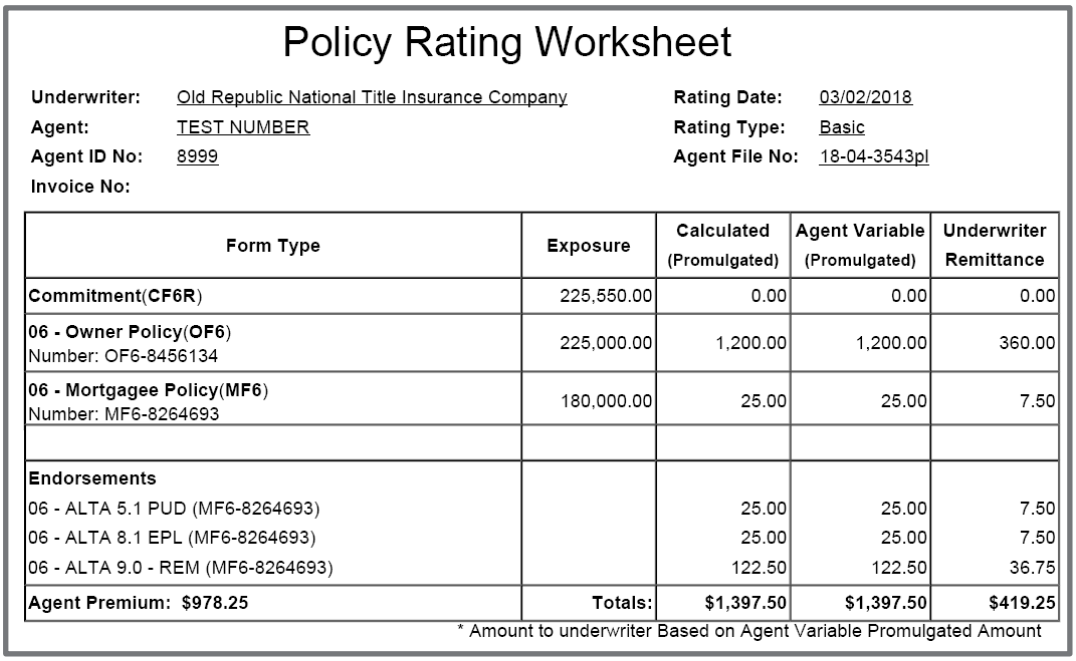
Endorsement Selection

Count	Type	Count	Type
0	06 - ALTA 10 Assignment/AME	0	06 - ALTA 11 Mtg Mod
0	06 - ALTA 12 Aggregation	0	06 - ALTA 4.1 Condo
1	06 - ALTA 5.1 PUD	0	06 - ALTA 6 Var Rate
0	06 - ALTA 6 Var Rate-Neg	0	06 - ALTA 7 Manf Hse Unit
1	06 - ALTA 8.1 EPL	1	06 - ALTA 9.0 - REM
0	Additional Interest	0	Balloon Mortgage
0	Change of Partners	0	Construction Loan Update
0	Contiguity	0	FF9 Florida Form 9
0	Florida Form 8.1 - EPL	0	Foreign Currency
0	General Endorsement	0	Navigational Servitude
0	Reverse Mortgage	0	Revolving Credit
0	Shared Appreciation	0	Survey

Note: Endorsments can only be added to the Count. To remove a specific endorsement, cancel out of this window and click the Remove link to remove a specific endorsement.

SAVE CANCEL

26. To view and/or print the **Policy Rating Worksheet** select the **Rating Worksheet** button.



Policy Rating Worksheet

Underwriter: Old Republic National Title Insurance Company
Agent: TEST NUMBER
Agent ID No: 8999
Invoice No:
Rating Date: 03/02/2018
Rating Type: Basic
Agent File No: 18-04-3543pl

Form Type	Exposure	Calculated (Promulgated)	Agent Variable (Promulgated)	Underwriter Remittance
Commitment(CF6R)	225,550.00	0.00	0.00	0.00
06 - Owner Policy(OF6) Number: OF6-8456134	225,000.00	1,200.00	1,200.00	360.00
06 - Mortgagee Policy(MF6) Number: MF6-8264693	180,000.00	25.00	25.00	7.50
Endorsements				
06 - ALTA 5.1 PUD (MF6-8264693)		25.00	25.00	7.50
06 - ALTA 8.1 EPL (MF6-8264693)		25.00	25.00	7.50
06 - ALTA 9.0 - REM (MF6-8264693)		122.50	122.50	36.75
Agent Premium: $978.25	**Totals:**	**$1,397.50**	**$1,397.50**	**$419.25**

* Amount to underwriter Based on Agent Variable Promulgated Amount

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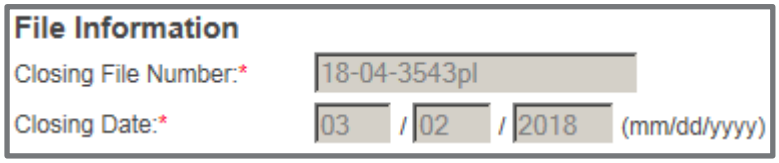
27. To exit the .pdf copy of the **Rating Worksheet**, select the **X**.

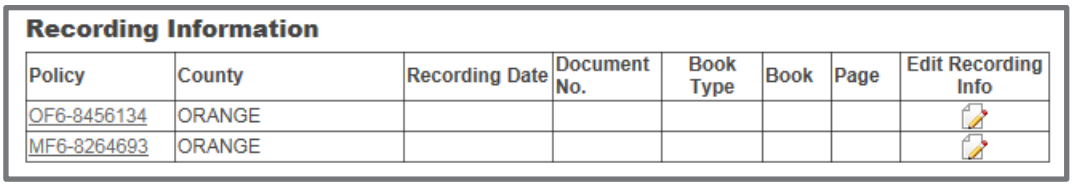
Uploading Schedules (Steps 28 – 35)

28. Select the **Continue** button at the bottom of the screen to move to the next screen *or* scroll to the top of the screen and select the **Schedule Upload** link.

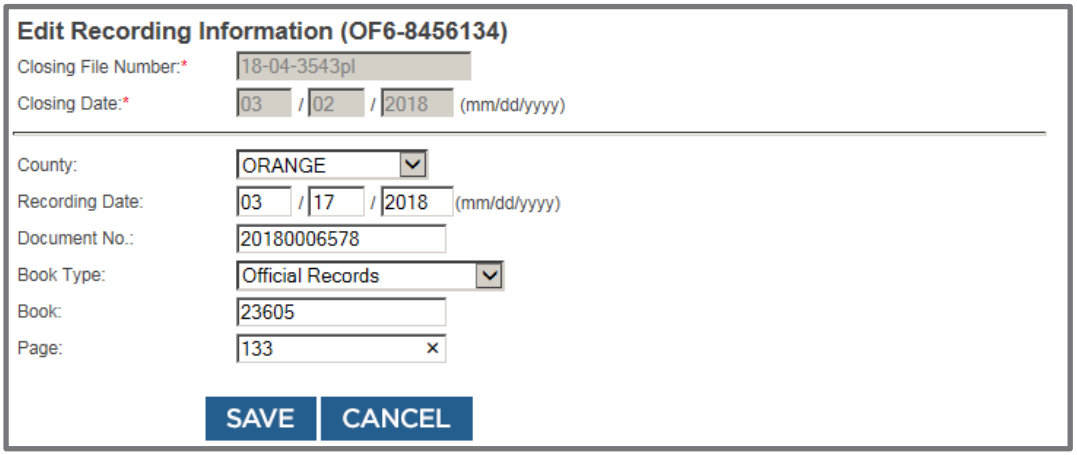
29. The fields containing **File Information** populate and are unavailable for change.



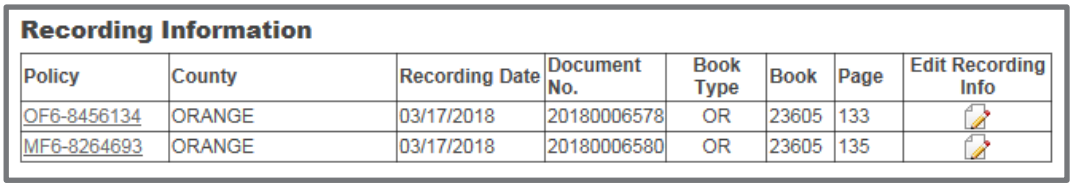
30. The **Recording Information** section is the location to add specific recording information for the insured document; select the **Edit Recording Info** symbol to open the window.



31. Enter the recording information of the insured document including; **Recording Date**, **Document No**. and/or **Book Type, Book** and **Page**. Select the **Save** button when all data has been entered to return to the **Schedule Upload** screen.



32. Repeat steps 30 and 31 for each insured document.



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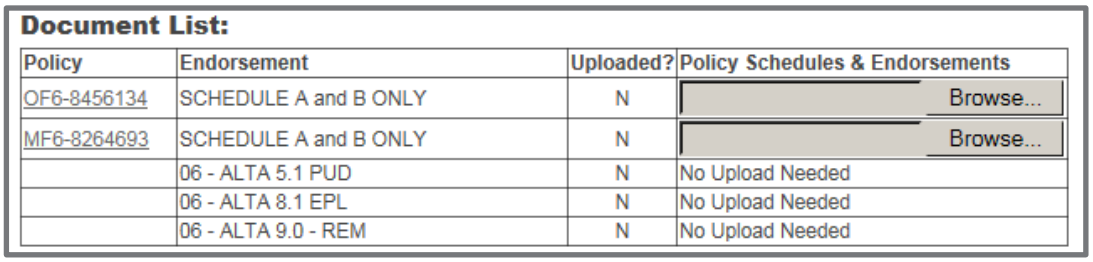
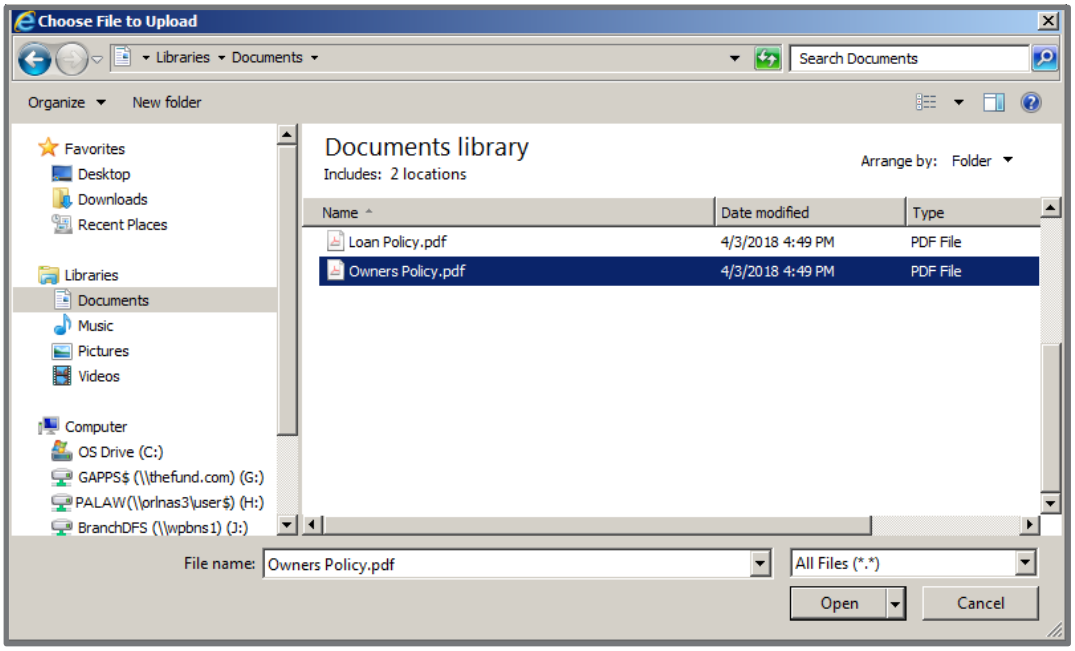
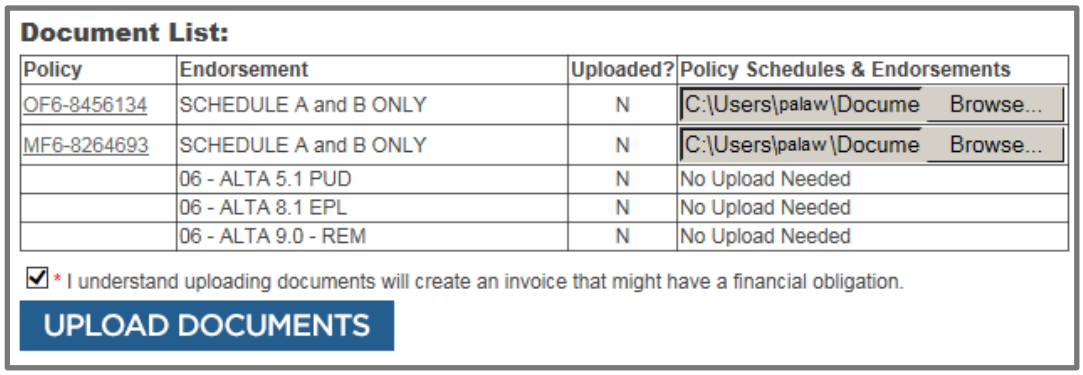
33. **Document List** is the location to **Browse** and locate policy schedules. Select the **Browse** button to locate **Schedule A and B Only** of the policy.



34. Once the document has been located, select the **Open** button. Note: There is no upload needed for endorsements.



35. After all policy schedules have been added, select the check box which reads "I understand uploading documents will create an invoice that might have a financial obligation". Once the check box has been selected, select the **Upload** Documents button.



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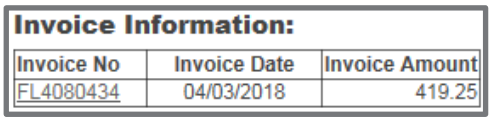
Viewing the Invoice (Steps 36 – 38)

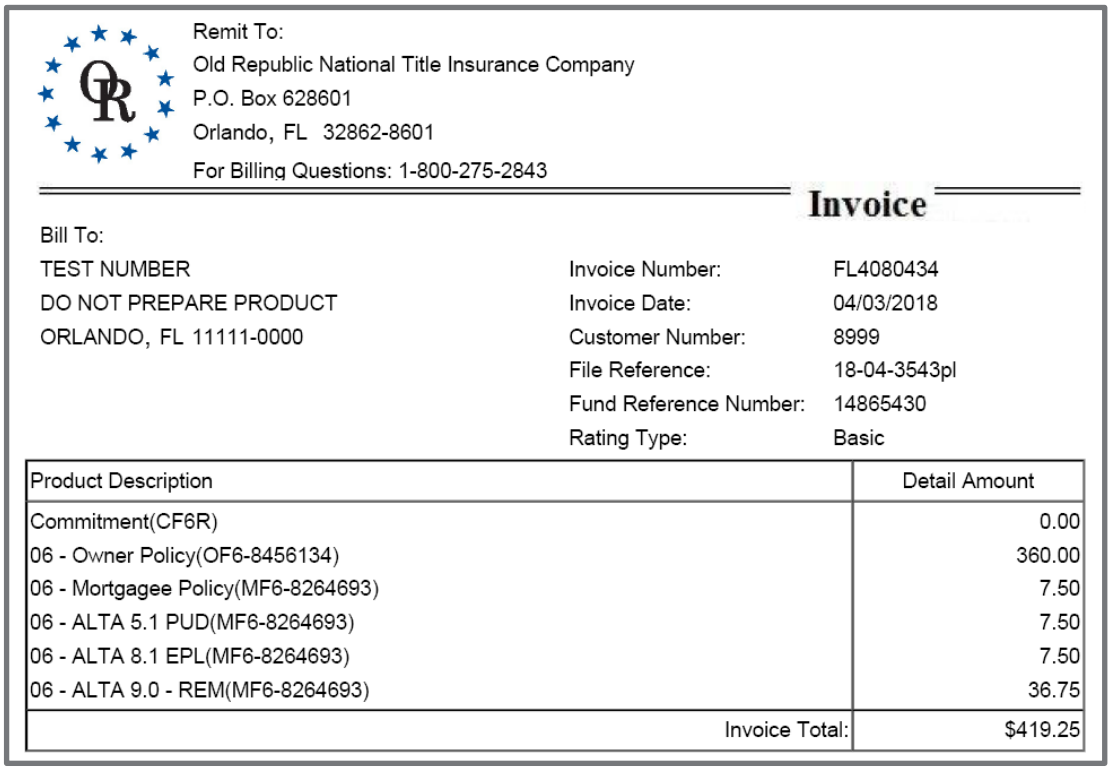
36. When uploading is complete, the **Invoice Information** section will display an **Invoice No.** link.



Invoice Information:

Invoice No	Invoice Date	Invoice Amount
FL4080434	04/03/2018	419.25

37. Select the link to view and print the invoice.



Remit To:
Old Republic National Title Insurance Company
P.O. Box 628601
Orlando, FL 32862-8601
For Billing Questions: 1-800-275-2843

Invoice

Bill To:
TEST NUMBER
DO NOT PREPARE PRODUCT
ORLANDO, FL 11111-0000

Invoice Number: FL4080434
Invoice Date: 04/03/2018
Customer Number: 8999
File Reference: 18-04-3543pl
Fund Reference Number: 14865430
Rating Type: Basic

Product Description	Detail Amount
Commitment(CF6R)	0.00
06 - Owner Policy(OF6-8456134)	360.00
06 - Mortgagee Policy(MF6-8264693)	7.50
06 - ALTA 5.1 PUD(MF6-8264693)	7.50
06 - ALTA 8.1 EPL(MF6-8264693)	7.50
06 - ALTA 9.0 - REM(MF6-8264693)	36.75
Invoice Total:	$419.25

38. To exit the .pdf copy of the invoice and return to the **Schedule Upload (Basic Rating)** screen select the **X.**

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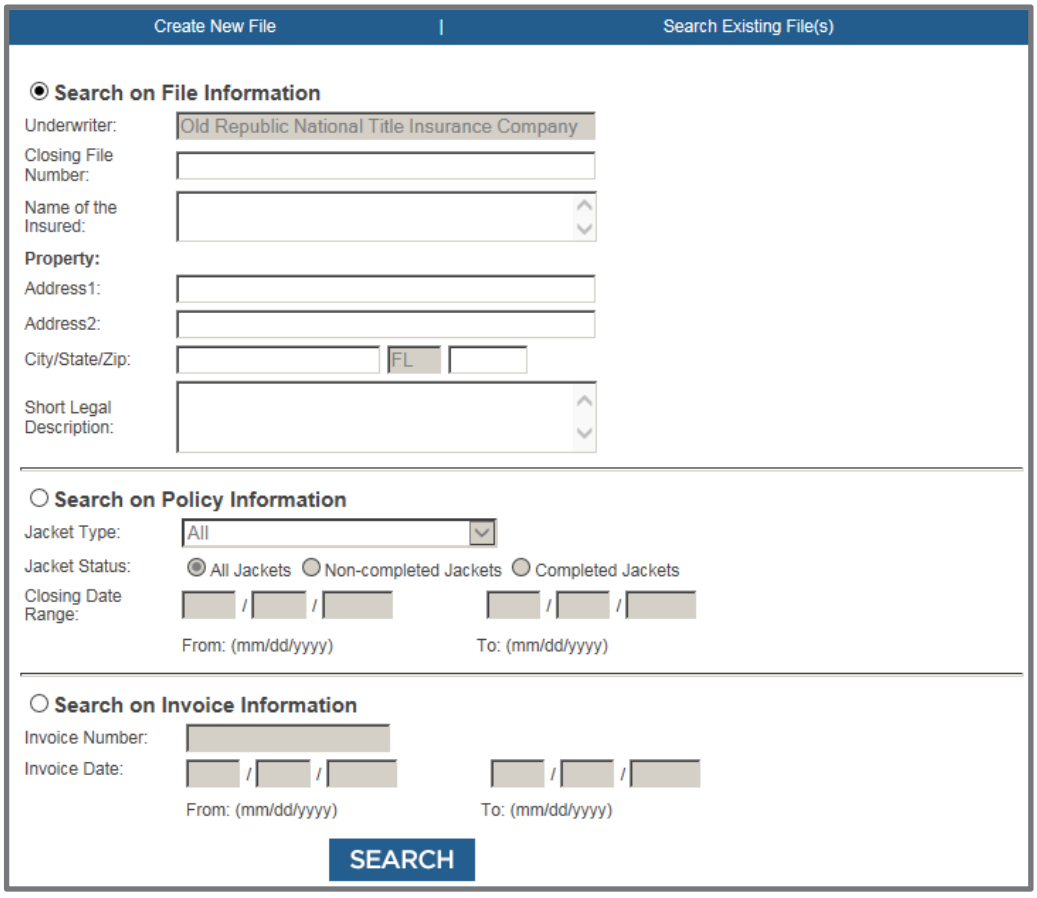
Search for an Existing File (Steps 1 – 6)

1. Log into www.thefund.com, in the **Launch Center** select the **ePolicyManager Launch App** link.

2. Select the **Search Existing File(s)** link.

3. Select the appropriate branch location (if applicable) for your firm or title agency and select the **Submit** button at the bottom of the screen.
4. Users can conduct a search for a file based on three types of search criteria; **Search on File Information**; **Search on Policy Information**; and **Search on Invoice Information**. Enter the applicable search criteria information and select the **Search** button at the bottom of the screen.



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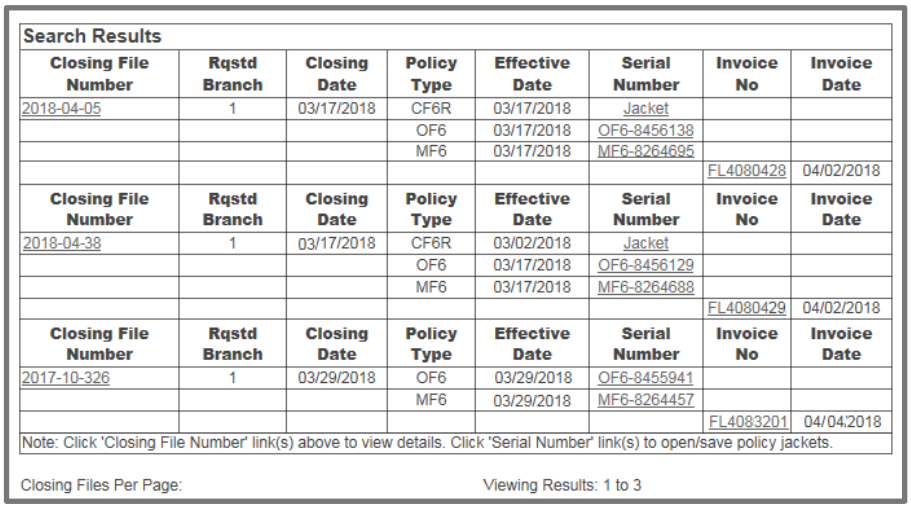
5. **ePolicyManager** will present a list of all files which meet the search criteria previously entered.



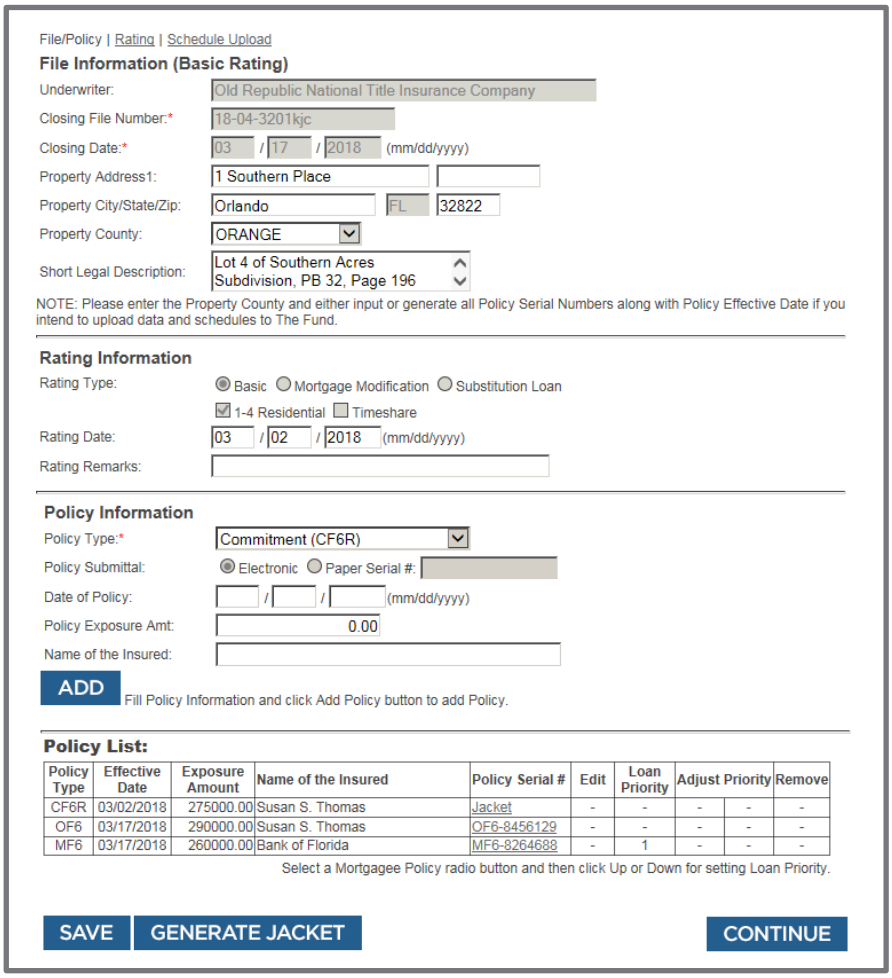
Search Results

Closing File Number	Rqstd Branch	Closing Date	Policy Type	Effective Date	Serial Number	Invoice No	Invoice Date
2018-04-05	1	03/17/2018	CF6R	03/17/2018	Jacket		
			OF6	03/17/2018	OF6-8456138		
			MF6	03/17/2018	MF6-8264695		
						FL4080428	04/02/2018
Closing File Number	**Rqstd Branch**	**Closing Date**	**Policy Type**	**Effective Date**	**Serial Number**	**Invoice No**	**Invoice Date**
2018-04-38	1	03/17/2018	CF6R	03/02/2018	Jacket		
			OF6	03/17/2018	OF6-8456129		
			MF6	03/17/2018	MF6-8264688		
						FL4080429	04/02/2018
Closing File Number	**Rqstd Branch**	**Closing Date**	**Policy Type**	**Effective Date**	**Serial Number**	**Invoice No**	**Invoice Date**
2017-10-326	1	03/29/2018	OF6	03/29/2018	OF6-8455941		
			MF6	03/29/2018	MF6-8264457		
						FL4083201	04/04/2018

Note: Click 'Closing File Number' link(s) above to view details. Click 'Serial Number' link(s) to open/save policy jackets.

Closing Files Per Page: Viewing Results: 1 to 3

6. Select the desired **Closing File Number** link to view details of the previously created file. All previously entered commitment and/or policy information displays. The user is now ready to continue working in **ePolicyManager**, beginning from the **File/Policy** screen.



File/Policy | Rating | Schedule Upload

File Information (Basic Rating)

Underwriter: Old Republic National Title Insurance Company
Closing File Number:* 18-04-3201kjc
Closing Date:* 03 / 17 / 2018 (mm/dd/yyyy)
Property Address1: 1 Southern Place
Property City/State/Zip: Orlando FL 32822
Property County: ORANGE
Short Legal Description: Lot 4 of Southern Acres Subdivision, PB 32, Page 196

NOTE: Please enter the Property County and either input or generate all Policy Serial Numbers along with Policy Effective Date if you intend to upload data and schedules to The Fund.

Rating Information

Rating Type: Basic Mortgage Modification Substitution Loan
1-4 Residential Timeshare
Rating Date: 03 / 02 / 2018 (mm/dd/yyyy)
Rating Remarks:

Policy Information

Policy Type:* Commitment (CF6R)
Policy Submittal: Electronic Paper Serial #:
Date of Policy: / / (mm/dd/yyyy)
Policy Exposure Amt: 0.00
Name of the Insured:

ADD Fill Policy Information and click Add Policy button to add Policy.

Policy List:

Policy Type	Effective Date	Exposure Amount	Name of the Insured	Policy Serial #	Edit	Loan Priority	Adjust Priority		Remove
CF6R	03/02/2018	275000.00	Susan S. Thomas	Jacket	-	-	-	-	-
OF6	03/17/2018	290000.00	Susan S. Thomas	OF6-8456129	-	-	-	-	-
MF6	03/17/2018	260000.00	Bank of Florida	MF6-8264688	-	1	-	-	-

Select a Mortgagee Policy radio button and then click Up or Down for setting Loan Priority.

SAVE GENERATE JACKET CONTINUE

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ePolicy Manager®

For additional assistance with ePolicy Manager®
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