

doma Title Insurance

Doma Title Insurance Rate Calculator Step Guide

Doma has enhanced the rate calculator for Rate Quote and Create a Jacket workflows!

- **Dynamic Data Input Boxes:** When a rate calculation requires an input value, the input box will appear automatically after selecting the rate code. This includes input fields such as "Prior Policy Amount" and "Unpaid Principal Balance".
- **Visual Clarity:** All required fields (including data input boxes) will be highlighted in red.

See an example of the updates below with a FL Reissue policy rate quote calculation.

Please note: the same workflow will be applied when creating a jacket in Agent Connect Policy Tools.

Step 1: From your Agent Connect Policy Tools dashboard page, select the "Rate Quote" tab.

The screenshot shows the Doma Agent Connect dashboard. At the top left is the logo 'doma | Agent Connect'. On the right, it says 'Welcome, Donna | Log Out'. Below the logo is a navigation bar with 'Policy Tools' and several tabs: 'Dashboard', 'Files', 'Rate Quote', 'Uploads', 'Remittances', 'Quick Actions', and 'Underwriting Resources'. A red arrow points to the 'Rate Quote' tab. Below the navigation bar is a 'Dashboard' section with two main panels. The left panel is titled 'Recent Files' and contains a table with columns 'File Number', 'State', and 'Effective Date'. The right panel is titled 'Activity Summary' and displays six circular gauges showing counts for 'CPLs' and 'Policies' for 'YTD' and 'MTD' periods.

File Number	State	Effective Date
ORG-68473-FL	FL	3/8/2024
ORG-61809	FL	4/12/2023
allietest-01-3-5-2024	CT	3/5/2024
123-allie-test-3-5-2024	CO	3/5/2024
TEST2-CC-030424	AZ	3/4/2024
TEST-CC030424	CA	3/4/2024
cpl-test-1115-209	NJ	3/4/2024
cpl-test-1145-44	FL	12/29/2023
cpl-test-1125-44	FL	12/29/2023
ORG-61123	NJ	12/29/2023
ORG-61123-12	FL	12/29/2023
cpl-test-1115-44	FL	12/29/2023

CPLs		Policies	
YTD	MTD	YTD	MTD
162	25	319	84
CPLs		Policies	
YTD	MTD	YTD	MTD
309	1	0	0

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Step 2: Select the transaction State, Agency/Office and Branch and click “Create New Quote”.

The screenshot shows the 'Rate Quote' section of the 'doma Agent Connect' interface. At the top left is the 'doma Agent Connect' logo. On the top right, it says 'Welcome, Donna | Log Out'. Below this is a 'Policy Tools' navigation bar with icons for Dashboard, Files, Rate Quote, Uploads, Remittances, Quick Actions, and Underwriting Resources. A dark blue bar at the top right contains 'Need Help?' and a menu icon. The main content area is titled 'Rate Quote' and features a search bar for 'Quote ID or File Number...'. Below the search bar are four dropdown menus: 'State' (with a list of state abbreviations from AL to ME), 'Company' (set to 'NATIC Demo'), 'Agency' (set to '999 - NATIC Demo'), and 'Branch' (set to 'NATIC Demo'). To the right of these dropdowns is a '+ CREATE NEW QUOTE' button. Two red arrows are overlaid on the image: one points to the 'State' dropdown menu, and the other points to the '+ CREATE NEW QUOTE' button.

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Step 3: Select the County, Transaction Type, and Property Type. Enter the Effective Date. Select the policy from the “Available Policies” dropdown list. Enter the Liability Amount and click “Add”.

Rate Quote - Reference ID Q333265

Search Quote ID or File Number...

State	Company	Agency	Branch	
FL	NATIC Demo	999 - NATIC Demo	NATIC Demo	+ CREATE NEW QUOTE
File Number:	Insured:	Prepared By:	Print / Text View Show Messages	
State	County	Transaction Type	Property Type	Effective Date
FL	---	Sale	Residential	03/08/2024
Available Policies	Liability	Available CPLs	Covered Party	Coverage
Please select Policy	\$ 0.00 <input type="button" value="Add"/>	Please select CPL	Lender	\$ 0.00 <input type="button" value="Add"/>
Grand Total:				\$0.00 \$0.00 \$0.00

Premium Quotes are for risk premium only and are based on the information input at the time the Policy Rate Quote Calculator is run. Any changes to the information may result in a change in the premium quote. If the title product you wish to quote requires variables that are not currently available in the Policy Rate Quote System, please contact your local representative for an exact premium quote. CA Users Only: All premium quotes shall use aggregate pricing calculations, if applicable.

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Step 4: Select the appropriate rate code from the “Rate Code” drop down. For this Reissue policy example, select the Reissue rate code (note: it could be named differently depending on the state).

Rate Quote - Reference ID Q333265 Search Quote ID or File Number...

State: Company: Agency: Branch:

File Number: Insured: Prepared By:

State: County: Transaction Type: Property Type: Effective Date:

Available Policies: Liability: Available CPLs: Covered Party: Coverage:

Policy Type	Liability	Premium	Agent	Doma
<input type="text" value="ALTA 2006 Owner's Policy (ARB-CLS) (FL)"/>	\$ 450,000.00	\$ 2,325.00	\$ 1,627.50	\$ 697.50 <input type="button" value="X"/>

Rate Code

-
-
-

Policy Total (including any Endorsements): \$2,325.00 \$1,627.50 \$697.50

Grand Total: \$2,325.00 \$1,627.50 \$697.50

Premium Quotes are for risk premium only and are based on the information input at the time the Policy Rate Quote Calculator is run. Any changes to the information may result in a change in the premium quote. If the title product you wish

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Step 5: If data entry is required to complete the rate calculation, these input boxes will now be displayed. For this FL Reissue example, two data input fields will display and be outlined in red to indicate that they are required. Enter the necessary data (the Prior Policy Date and Liability Amount).

Rate Quote - Reference ID Q333265

Search Quote ID or File Number...

State	Company	Agency	Branch		
FL	NATIC Demo	999 - NATIC Demo	NATIC Demo	+ CREATE NEW QUOTE	
File Number: <input type="text"/>		Insured: <input type="text"/>		Prepared By: <input type="text"/>	
Print / Text View		Show Messages			
State	County	Transaction Type	Property Type	Effective Date	
FL	Broward	Sale	Residential	03/08/2024	
Available Policies		Liability	Available CPLs		Covered Party
Please select Policy		\$ 0.00 <input type="button" value="Add"/>	Please select CPL		Lender
Coverage		\$ 0.00 <input type="button" value="Add"/>			
Policy Type	Liability	Premium	Agent	Doma	
ALTA 2006 Owner's Policy (ARB-CLS) (FL)	\$ 450,000.00	\$ 2,325.00	\$ 1,627.50	\$ 697.50 <input type="button" value="X"/>	
Rate Code	Prior Policy Date		Prior Liability		
2A1 - Reissue Rates	<input type="text"/>		\$ 0.00		
<input type="button" value="Add Endorsements"/>					
Policy Total (including any Endorsements):		\$2,325.00	\$1,627.50	\$697.50	
Grand Total:		\$2,325.00	\$1,627.50	\$697.50	

Premium Quotes are for risk premium only and are based on the information input at the time the Policy Rate Quote Calculator is run. Any changes to the information may result in a change in the premium quote. If the title product you wish

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Step 6: The Premium calculation will update to reflect reissue rate calculated amount.

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Welcome, Donna | Log

Policy Tools

- Dashboard
- Files
- Rate Quote
- Uploads
- Remittances
- Quick Actions
- Underwriting Resources

Need Help?

Rate Quote - Reference ID Q333265

Search Quote ID or File Number... Search

State: FL | Company: NATIC Demo | Agency: 999 - NATIC Demo | Branch: NATIC Demo

+ CREATE NEW QUOTE

File Number: | Insured: | Prepared By: | Print / Text View | Show Messages

State: FL | County: Broward | Transaction Type: Sale | Property Type: Residential | Effective Date: 03/08/2024

Available Policies: Please select Policy | Liability: \$ 0.00 | Available CPLs: Please select CPL | Covered Party: Lender | Coverage: \$ 0.00

Policy Type	Liability	Premium	Agent	Doma
ALTA 2006 Owner's Policy (ARB-CLS) (FL)	\$ 450,000.00	\$ 1,630.00	\$ 1,141.00	\$ 489.00

Rate Code: 2A1 - Reissue Rates | Prior Policy Date: 01/01/2022 | Prior Liability: \$ 325,000.00

Add Endorsements

Policy Total (including any Endorsements): \$1,630.00 \$1,141.00 \$489.00

Grand Total: \$1,630.00 \$1,141.00 \$489.00

For further questions, please reach out to SOSTeam@doma.com for additional support.