

Doma Policy Jacket User Guide

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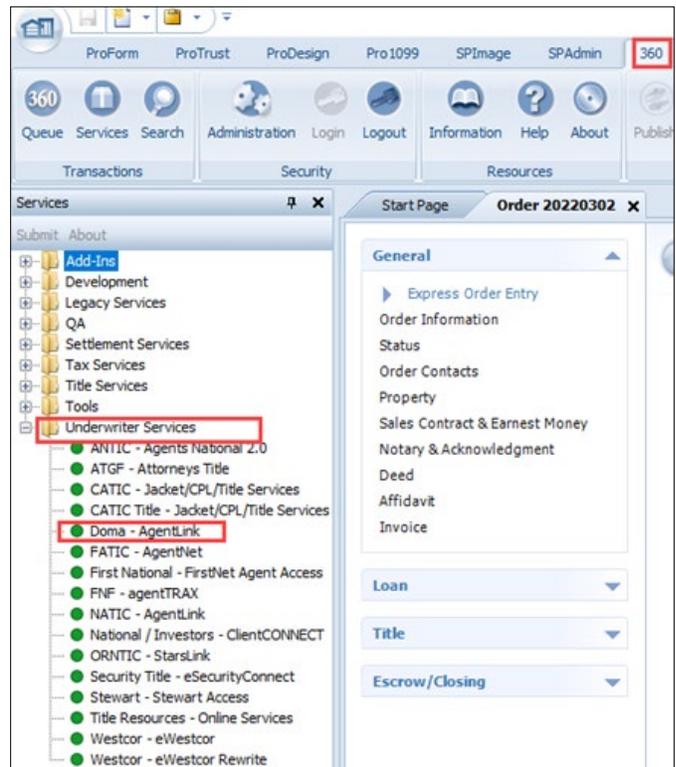
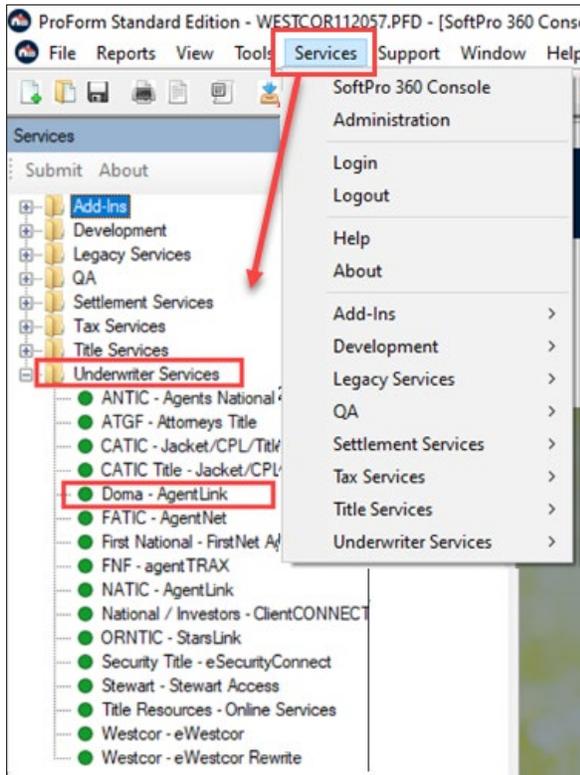
Introduction

The Doma integration with SoftPro 360 will allow ordering of Doma products using the data within ProForm. SoftPro 360 will be able to create a Doma file corresponding to information in the ProForm order and enable ordering Policy Jackets along with CPLs through Doma. Additionally, users can update and void existing CPLs and Jackets. All available without having to leave the SoftPro workspace, helping to facilitate a more efficient workflow by reducing or eliminating the duplication of data.

Accessing Doma

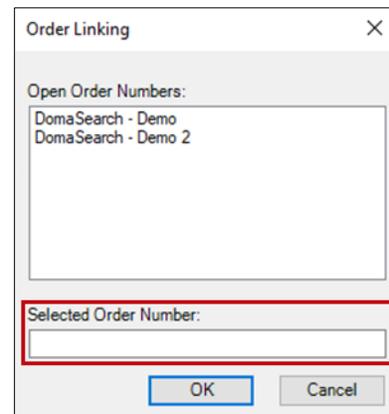
From the **360** ribbon, click the **Services** button to open the **Services** tab.

1. Click the **Underwriter Services** folder to expand
2. Double-click the **Doma – AgentLink** entry



Select a ProForm Order for Title Search

Each Search request must be linked to a ProForm Order. If a ProForm order is already open and active, the active order is automatically linked to the request. If no active order is open, enter the order number in the **Selected Order Number** field. Once the order is confirmed, click **OK**.



Welcome Screen

After a ProForm Order is linked, the **Welcome** screen displays.

You can check the **Skip Welcome Page** check box to skip having the **Welcome** screen display each time you log into Doma.

Click the **Next** button to continue.

Logging into Doma

The Login screen requires a valid **User Name** and **Password**.

NOTE: If needed, use the **Need Help Logging In** link to send an email requesting assistance with login credentials.

Check the **Remember Me** check box to automatically log in when launching the product in future sessions.

Click the **Login** button to continue to the **Agency/Branch Selection** screen.

Agency/Underwriter Selection Screen

Select the applicable,

- **Agency Name** for this order
- **Branch** for this order
- **Underwriter** for this order

All are required fields and once selected, the Next button is enabled.

Click the **Back** button to return to the log in screen or **Next** to launch **Title Services** screen

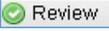
Title Service Screen

From the **Title Services** screen, the following features are available:

- View a list of the CPLs that have been ordered
- Order a CPL
- Update an issued product
- Void an issued product
- View order data that has been sent to Doma

A table displays the products ordered from Doma and provides the following information for each CPL:

Action:

- **Review**  button: 360 has received the CPL from Doma (**Status = Ready**) and it is ready for the user to review and accept. Clicking the **Review** button displays the **Review** screen, where the user can review and accept the product.
- **Red Exclamation**  icon: The request submitted to Doma encountered an error and no product was created. Hover over the exclamation mark or double-click it to view a description of the error.

Product: The type of product requested from Doma. For CPLs, the value will always be **Closing Protection Letter**.

Type: Displays the type of product ordered. If CPL is requested, it will display the covered party (Lender, Buyer/Borrower, or Seller).

Insured: Insured party

Amount: Liability amount is shown for the policy jackets only.

Status:

- **Ready:** 360 has received the remitted document from Doma and is ready for review and accept (attach to the order).
- **Completed:** The remitted product was accepted and attached to the order.
- **Rejected:** An error occurred with the submission of the request.
- **Canceled:** The product was voided.

Created On: Date and time stamp of when the product was generated.

The table data can be sorted by clicking the column heading. Click once to sort in ascending order, click again to sort in descending order.

The **Add Product** button is available to order a CPL

To **update** an issued product, highlight a transaction that is in **Completed** status and click the **Update** button.

To **cancel** an issued product, highlight a transaction that is in **Completed** status and click the **Void** button.

To view the order data being sent to Doma, click the **File Information** link.

File Information Screen

The **File Information** screen displays populating the Agency Name, Branch, and Underwriter selected on the **Agency/Underwriter Selection** screen. These fields are **not** editable.

The user must select the

- **Transaction Type** (required selection)
- **Property Type** (required selection)
- **Property Address**
 - Defaults to the first address listed in the ProForm order.
 - **Address 1, Address 2, City, State,** and **Zip** populate with the **Property Address** selection for review.
- **County** (required selection)

The screenshot shows a web application window titled "Doma - 20220302". The main content area is titled "File Information" and features the "doma" logo in the top right. The form contains several dropdown menus and text input fields. The "Agency Name" is set to "States Title Agency, Inc.", "Branch" to "Arizona Sales Artemis", and "Underwriter" to "North American Title Insurance Company". "Transaction Type" and "Property Type" are both set to "-- Select --" and have a red asterisk next to them. "Property Address" is "155 W Johnston St, Rock hill, NC, 29730". "Address 1" is "155 W Johnston St". "Address 2" is empty. "County" is "-- Select --" with a red asterisk. "City" is "Rock hill", "State" is "NC", and "Zip" is "29730-____". At the bottom right, there are "Save" and "Cancel" buttons, with the "Save" button highlighted by a red rectangular box.

Click the **Save** button to send this information to Doma or the **Cancel** button to return to the **File Information** screen without submitting.

Available Products Screen

- Select **Policy Jacket** to navigate you to the **Jacket Selection** screen.
- Click the **Close** button to continue

The screenshot shows a window titled "Available Products". It contains two main options, each with a blue arrow icon and a description:

- Closing Protection Letter**: Attach a new Closing Protection Letter to your ProForm Order.
- Policy Jacket**: Attach a new Jacket to your ProForm Order.

 The "Policy Jacket" option is enclosed in a red rectangular box. At the bottom right of the window, there is a "Close" button, which is also highlighted with a red rectangular box.

Requesting a Policy Jacket

If Policy Jacket is selected, the Jacket Information screen displays. From this screen the user must select the,

- **Simultaneous** – selected when a policy jacket is to be created for the Lender and Owner. Selecting this option displays the Lender and Owner’s Policy screens.
- **Lender** – selected to create a Lender policy jacket
 - **Loan** – the first loan in the ProForm order is selected by default.
- **Owner** – selected to create an Owner policy jacket
- **Others** – selected to create an “Other” policy jacket.

Click **Next** to proceed to **Jacket Type** selection screens or **Cancel** to return to the **Title Services** Screen.

Policy Screens – Loan & Owner’s

The **Policy** screens (Loan and Owner’s) pull information, if entered, from the ProForm order.

- **Liability** - pulls from the **Policy Liability** field. The Users have the ability to override or choose a different date to send with the Order.
 - This is a required field.

Code	Name	Gross Premium	Net to Underwriter
<input checked="" type="checkbox"/>	ALTA 10 ALTA Endorsement 10-06 (Assignment)	\$0.00	\$0.00
<input checked="" type="checkbox"/>	ALTA 11.1 ALTA Endorsement 11.1-06 (Mortgage Modifi...	\$0.00	\$0.00

- **Effective Date** - pulls from the **Policy Effective Date** field. Users have the ability to override or choose a different date to send with the Order.
 - This is a required field.
- **Form Type** - displays available forms returned from Doma based on the order information.
 - This is a required field.
- **Insured Party**
 - Owner's Policy - concatenates the buyer/borrowers entered in the ProForm order.
 - Loan Policy – pulls the name of the lender for the loan selected
 - This is not a required field.
- **Endorsements**
 - Check box
 - This column is not editable
 - All selected Endorsements are sent with your product request
 - **Code** – displays the endorsement code from the ProForm order.
 - **Name** – List of endorsements from Doma. Endorsements defined in your ProForm order are automatically checked against the Doma list.
 - **Gross Premium** – Enter amount to send to Doma
 - This is not a required field
 - **Net to Underwriter** – Enter amount to send to Doma
 - This is not a required field
- Click **Back** to return to the Jacket Information Screen, **Submit** to send the order data to Doma, or **Cancel** to return to the Title Services Screen.

Doma - 1456465456

Owner's Policy

Liability : \$25,000.00 Effective Date : 10/23/2023

Form Type : ALTA 2006 Owner's Policy (ARB-CLS) (FL)

Insured Party : Ritesh Patel, Megha Patel, and Terry Jones

Proform Endorsement(s):

Code	Name	Gross Premium	Net to Underwriter
<input checked="" type="checkbox"/>	ALTA 27 ALTA Endorsement 27-06 (Usury)	\$0.00	\$0.00
<input checked="" type="checkbox"/>	ALTA 28.1 ALTA Endorsement 28.1-06 (Encroachments ...)	\$0.00	\$0.00

Back Next Cancel

Other Policy Jacket

When an **Other** Jacket is selected, the **Form Type Selection** screen is displayed allowing the user to select from a list of available forms from Doma.

- **Form Type** - a list of forms returned from Doma is presented. This is a required field

Click the **Submit** button to send the data to Doma, click the **Back** button to return to the **Jacket Information** screen, or **Cancel** button to return to the **Title Services** screen.

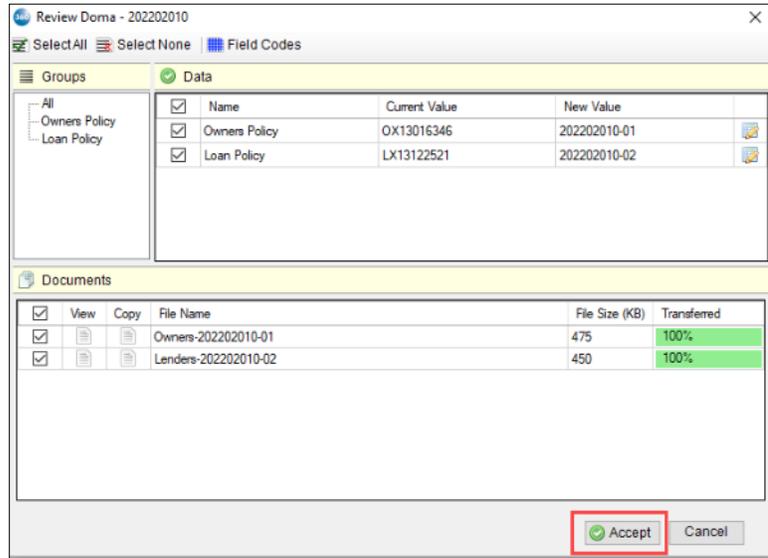
Reviewing Received Products from Doma

The **Title Services** screen provides a list of the products that have been ordered to include those that are ready for review and acceptance into the ProForm order (**Status = Ready**).

Open the **Review** screen by clicking the **Action**  icon for the corresponding entry.

Action	Product	Type	Insured	Amount	Status	Created On
	Jacket	Lender	Chase	250000.00	Ready	3/3/2022 4:45 PM
	Jacket	Owner	First Last	300000.00	Completed	3/3/2022 4:45 PM
	CPL	LENDER	Chase		Ready	3/3/2022 4:44 PM
	CPL	LENDER	Chase		Completed	3/3/2022 9:56 AM
	CPL	LENDER	Chase		Ready	3/3/2022 9:51 AM
	CPL	LENDER	Chase		Completed	3/3/2022 9:48 AM
	CPL	LENDER	Chase		Completed	3/3/2022 9:39 AM
	CPL	LENDER	New Lender	\$52,000.00	Canceled	3/3/2022 9:37 AM

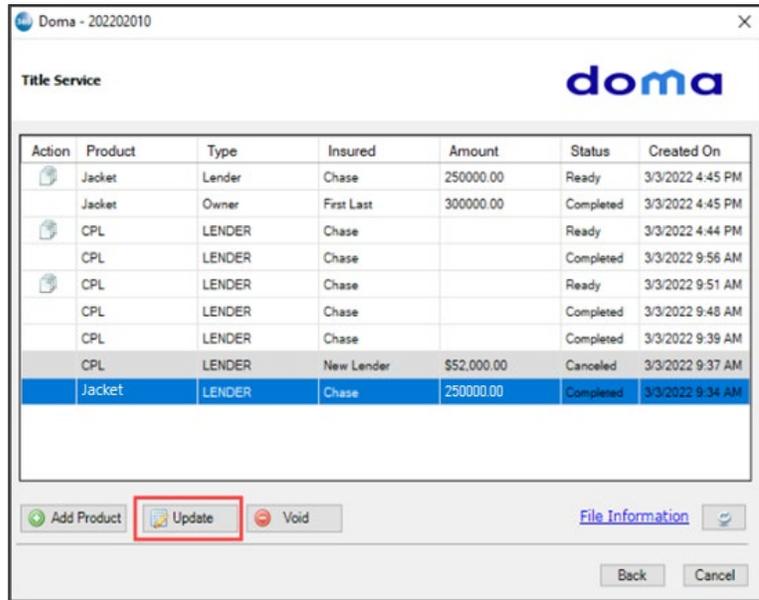
To approve the document and data, if any, writing back to the ProForm order, click **Accept** to import the data and documents into the corresponding order.



Editing a Jacket

From the **Title Services** screen, you can edit a Jacket that you previously created from the Order.

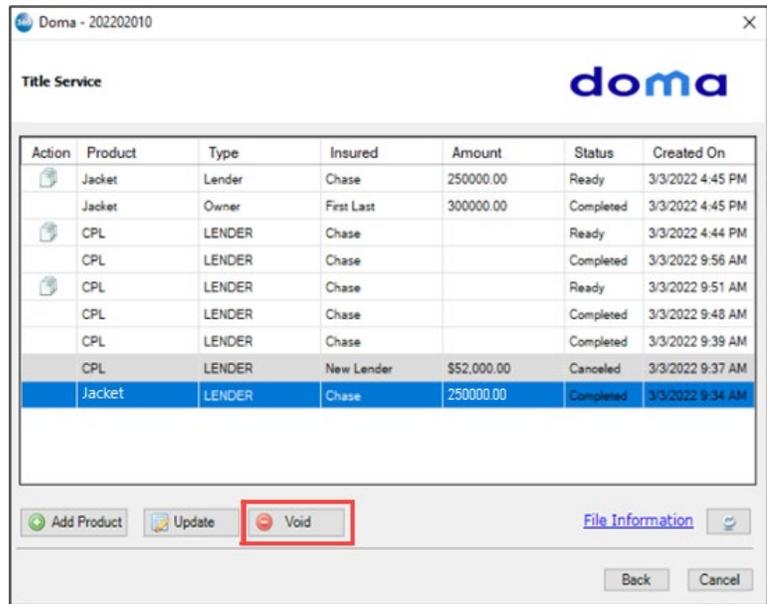
- Highlight the Jacket transaction you wish to edit.
- Click the **Update** button. You then have the opportunity to update the data for the request.
- Click **Submit** to generate the updated letter.



Voiding a Jacket

From the **Title Services** screen, you can Void a Jacket that you previously created from the Order.

- Highlight the CPL transaction you wish to void.
- Click the **Void** button



- Select a **Void Reason** for the request (required).
- Click **Void** to send the request to Doma.

