

Using the Rates and Contracts Screen

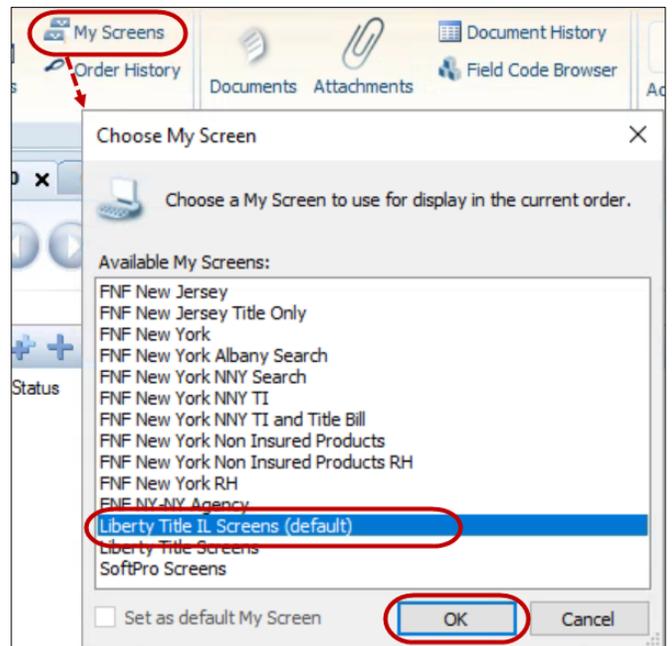
The Rates and Contracts screen allows you to pull in the Attorney rates (per their contract) and apply those rates to endorsements, policies and company charges. Follow these steps to pull the Attorney information from the Lookup Table and apply the rates.

- > [Adding an Attorney Contract to your Order](#)
- > [Applying the Attorney Rates](#)
- > [Adding a New Attorney Contract](#)

Adding an Attorney Contract to your Order

With the order open,

1. Click the **MyScreens** button
2. Select the **Liberty Title IL Screens**; click **OK**



3. Navigate to the **Order Contacts** screen
4. Double-click the **AT – Attorney (Contract Attorney)** placeholder to open
5. Click the **Lookup code** link
6. Double-click the applicable entry to select



7. Check the **Marketing Source** check box
8. From the **Marketing rep** drop-down, select our rep
9. From the **Represents** drop-down, select the corresponding code; optional entry
10. Highlight the **ContractNo** field entry; press the **Ctrl + C** keys to copy

11. Navigate to the **Rates and Contracts** screen
12. Click in the **ContractNo** field
13. Press the **Ctrl + V** keys to paste the entry (from **Step 10**); press the **Enter** key

The **Rates and Contracts** screen populates with applicable information for the Attorney selected.

NOTE: If the Attorney information does not populate, refer to the **Adding a New Attorney Contract** section to add to them.

The information populated determines the rates and splits for the Attorney.

- › **OPSplitPercent / LPSplitPercent** percentages or **LP Amount** (if a flat fee rather than percentage) are applied to the Title Insurance Premiums
- › Company Charges screen pulls,
 - ›› **CUF** = Commitment Update Fee
 - ›› **COT** = Chain of Title Fee
 - ›› **PUF** = Policy Update Fee
- › **Endorsement** identifies if fee is applicable to **All**, **None**, **One** or **Two** endorsements on the **Endorsements** screen
- › **ContractAlert** identifies notes about the contact; this is for your information only

Residential Order Split

OPSplitPercent: %

LPSplitPercent: %

CUF

COT

PUF

Endorsement:

ContractAlert: This is a VIP Client

Applying the Attorney Rates

1. Navigate to the **Policy Selection/Title Insurance** screen
2. Highlight a policy in the grid
3. Click the **Policy lookup Code** link
4. Double-click the applicable policy to select
5. Repeat **Steps 2-4** for each policy shown

Policy Selection/Title Insurance

Policies to be Issued

Policy Type	Proposed Insured	Coverage Amount	Version Code	Version
Loan Policy				
Owner's Policy				

Loan: [Policy lookup Code:](#)

Policy version:

Lookup Table - P - Loan Policy Version - Liberty

Sort	Version
01-IL	ALTA Loan Policy 2006
02-IL	ALTA Short Form Residential Loan Policy 2012
03-IL	ALTA Residential Limited Coverage Junior Loan Policy 2012

6. Scroll down to the **Title Insurance Premium Selection** section
7. From the **Policy code** drop-down, select the applicable policy

Title Insurance Premium Selection

State:

Zone / Area:

Underwriter: [Chicago Title Insurance Company](#)

Policy type:

Policy code:

Description:

The Attorney fields at the top of the screen show,

- > **AttySplitAmt** = title premium split (policy and endorsements)
- > **Contract Alert** = Attorney name and their corresponding rates along with any notes entered

Policy Selection/Title Insurance Buyers: Property Address: 6951 Test Way
 Sellers: Balance: \$0.00

Use Negotiated Premium
 Request NRC Comparison

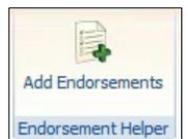
AttySplitAmt:

Contract Alert:

Attorney Barker, Norwood & Stuart, LLP to be paid 85% of the OP / 100% of the LP.
 Attorney gets 100% of ALL of the Endorsements.
 Attorney also gets 100% of CUF/COT (Split on Company Charges Screen)
 This is a VIP Client

8. Add Endorsements

- a) From the **Order** ribbon, click the **Endorsement Helper** button
- b) Verify or select the **Title product**
- c) Check the check box(es) to add applicable endorsements
- d) Click the **OK** button



Endorsement Helper - Add Endorsements

Title product: Underwriter: Commercial
 Residential

State:

Available Endorsements Filter:

Lookup Code	Code	Description
<input type="checkbox"/> E06A008_01	ALTA 8.1-06	ALTA 8.1-06 - Environmental Protection Lien (CLTA 110.9-06)
<input type="checkbox"/> E06A009_00	ALTA 9-06	ALTA 9-06 - Restrictions, Encroachments, Minerals
<input checked="" type="checkbox"/> E06A009_03	ALTA 9.3-06	ALTA 9.3-06 - Covenants, Conditions and Restrictions
<input type="checkbox"/> E06A011_00	ALTA 11-06	ALTA 11-06 - Mortgage Modification
<input type="checkbox"/> E06A013_01	ALTA 13.1-06	ALTA 13.1-06 - Leasehold

9. Navigate to the **Company Charges** screen

10. If applicable, verify the **Charge** is populated for the,

- a) **Commitment Update Fee**
- b) **Chain of Title Policy Update Fee**
- c) **Policy Update Fee**

Description	Charge	Issued Date	Effective Date	Line
Commitment Update Fee	\$125.00			C.08
Clerking Fee	\$100.00			C.04
Water Zoning Cert Fee	\$150.00			C.18
Search Fee	\$300.00			C.17
Regulation Fee	\$3.00			C.16
Settlement Fee				
Email Fee	\$40.00			C.10
Wire Transfer Fee	\$80.00			C.20
Chain of Title Fee	\$250.00			C.03
Policy Update Fee	\$125.00			C.15

11. Verify the **Line** is the same for the, (the **Charge** updates once the policies are selected in the next steps)

a) **Approved Atty Income**

b) **Approved Atty Expense**

Compliance Fee	\$3.00	C.09
Approved Atty Income	0.00	H.04
Approved Atty Expense (Empty)	0.00	H.04

The **Company Charges** screen updates to show the corresponding amounts for the,

- > **Approved Atty Income**
- > **Approved Atty Expense**

Company Charges					Buyers: BUYER
					Sellers:
+ -					
Description	Charge	Issued Date	Effective Date	Line	
Email Fee	\$40.00			C.11	
Wire Transfer Fee	\$80.00			C.20	
Chain of Title Fee	\$250.00			C.04	
Policy Update Fee	\$125.00			C.15	
Overnight/Express Mail Fee	\$50.00			C.13	
APLD Processing Fee	\$50.00			C.03	
Funding Fee	\$30.00			C.12	
Compliance Fee	\$3.00			C.10	
Approved Atty Income	\$3,356.25			H.04	
Approved Atty Expense	(\$3,356.25)			H.04	

12. Highlight the **Approved Atty Expense** entry in the grid

13. Click the **CDF: 1** link to navigate to the corresponding statement line

Charge: (\$3,356.25) Taxable Line: H.04 **CDF: 1** Title - Approved At

Fee type: Taxation:

14. Click the **Line** number link

15. For the **Title – Approved Atty Expense** entry, select the **T-Contact** from the **To-**code drop-down

CDF Page 2				
H. Other				
	Description	Re	To	Name
01	Home Warranty		O	
02	Listing Agent Commission		LB	
03	Pest Inspection		PI	
04	See Additional H.04 Items			

16. Click the **Close** button

H. Other Charges					
Charges for Line 04					
+ -					
	Description	Re	To	Borrower-Paid At Closing	Borrower-Paid Before Closing
1	Title - Approved Atty Income		AT	\$3,356.25	
▶ 2	Title - Approved Atty Expense		T	(\$3,356.25)	

Use the **Order Transaction** screen to verify the Attorney charges.

1. Navigate to the **Order Transactions** screen
2. Locate the Attorney disbursement
3. Click the **Group** link to view all charges are shown; click the **Close** button

Order Transactions Buyers: BUYER Property Address: 6951 Test Way
 Sellers: Balance: (\$1,745.25)

Receipts:

CDF	Code	Name	Amount	Details
1	L	First Ever Savings and Loan	\$700,000.00	Loan Funding...
1	BA	BUCKY BUYER	\$205,493.00	From Buyer

Σ Total: \$905,493.00

Disbursements:

CDF	Code	Name	Amount	Held	Details
1	S		\$898,247.00	<input type="checkbox"/>	To Seller
1	AT	Barker, Norwood & Stuart, LLP	\$7,056.25	<input type="checkbox"/>	Group...
1	A2				

Disbursement Details for AT

Available to Group:			Grouped:		
Code	Amount	Details	Code	Amount	Details
AT	\$150.00	CDFLine C.02	AT	\$50.00	CDFLine C.01
AT	\$3,125.00	CDFLine H.07	AT	\$3,356.25	CDFLine H.04
AT	\$125.00	CDFLine C.09	AT	\$250.00	CDFLine C.04

Adding a New Attorney Contract

1. Navigate to the **Rates and Contracts** screen
2. Verify the Attorney Contract does not exist in the **Master Contract Lookup Table**
 - a) Click the **ContractNo** link
 - b) In the **Search** field, enter the last name or part of the company name; press the **Enter** key
 - c) Close the **Lookup Table**

Rates and Contracts Buyers:
 Sellers:

ContractNo: **Residential Order Split** OPSplitPercent:

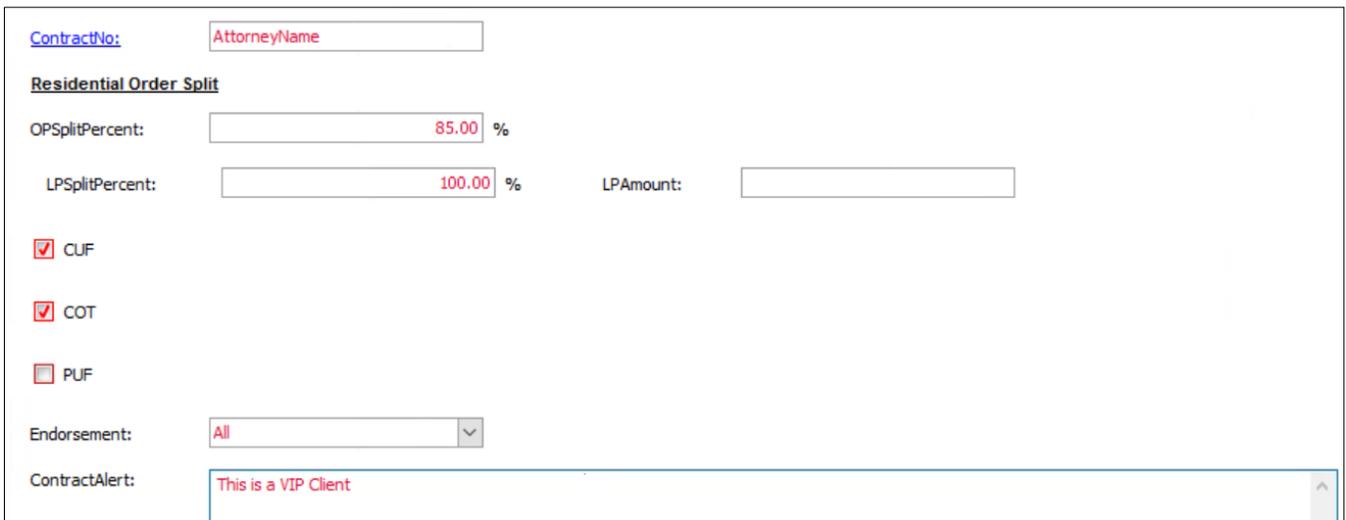
Lookup Table - P - Liberty Master Contract

Retrieve Entry Insert Entry Search Enter name or company name

ContractNum_FNFLIB#	OPSplitPercent_FNFLIB#	LPSplitPercent_FNFLIB#	LPA
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Continue on to next steps if the Attorney Contract does **not** exist in the **Master Contract Lookup Table**.

3. Enter or select the following,
 - a) **ContractNo** = Company name or Attorney name; you create this entry
 - b) **OPSplitPercent** (if applicable) = percentage the Attorney keeps
 - c) **LPSplitPercent** (if applicable) = percentage the Attorney keeps
 - d) **LPAmount** (if applicable) = flat amount of the Loan Premium the Attorney keeps
 - e) **CUF** check box = check if the Attorney keeps the Commitment Update Fee
 - f) **COT** check box = check if the Attorney keeps the Chain of Title Fee
 - g) **PUF** check box = check if the Attorney keeps the Policy Update Fee
 - h) **Endorsement** = select from drop-down
 - i) **ContractAlert** = notes entered for informational purposes only; does not pull to any documents



The screenshot shows a form for entering attorney contract information. The fields are as follows:

- ContractNo:** AttorneyName
- Residential Order Split**
 - OPSplitPercent:** 85.00 %
 - LPSplitPercent:** 100.00 %
 - LPAmount:** (empty field)
- CUF
- COT
- PUF
- Endorsement:** All
- ContractAlert:** This is a VIP Client

4. Add contract information to the **Master Contract Lookup Table**

- a) Click the **ContractNo** link
- b) From the **Lookup Table**, click the **Insert Entry** button
- c) Click the **Save**  icon; the entry is added to the bottom of the table



The screenshot shows the Master Contract Lookup Table with annotations:

- a**: A red circle around the **ContractNo** link in the form above.
- b**: A red circle around the **Insert Entry** button in the table's toolbar.
- c**: A red circle around the **Save** icon in the table's toolbar.

ContractNum_FNFLIB#	OPSplitPercent_FNFLIB#	LPSplitPercent_FNFLIB#	LPAmount_FNFLIB#
BarkerNorwoodStuart	.85	1	

Once you add the new Attorney **ContractNo** via the **Rates and Contracts** screen, you must also add the new **ContractNo** to the **AT-Attorney** Contact via the **Order Contacts** screen.

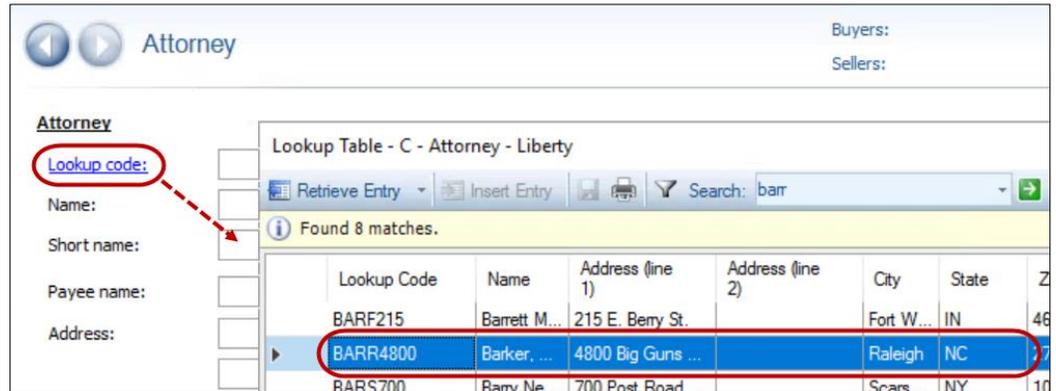
5. Add the new **ContractNo** to the **AT-Attorney** Contact

a) Navigate to the **Order Contacts** screen

b) Double-click the **AT-Attorney** Contact; this should be your marketing source

c) Click the **Lookup code** link

d) Search for the corresponding Attorney



NOTE: Refer to the job aid, *Contacts – Adding/Updating Lookup Tables* if the Attorney does not exist in the Order Contacts **Lookup Table**.

e) Double-click the entry to select

f) In the **ContractNo** field, enter the new **ContractNo** created in **Step 3** above



IMPORTANT: These entries **must** match in order for the rates to calculate properly.

g) Click the **Lookup code** link

h) From the **Lookup Table**, click the **Insert Entry** button



i) When prompted, click **Yes** to **Duplicate key field value** message

j) Click the **Save** icon

k) Close the **Lookup Table**

