Stewart Title Guaranty Company and Stewart Title Insurance Company

Closing Protection Letter Integration

Overview:

TitleDesktop/MagramOnline has been integrated with the Stewart Title Guaranty Company and Stewart Title Insurance Company, Stewart Access portal (ST), to enable users to retrieve Closing Protection Letters without leaving TitleDesktop/MagramOnline.

Select the link in the Table of Contents for instructions on each topic.

Table of Contents:

- **Underwriter Login Credential Initial Setup from User Detail Screen**
- **Editing Underwriter Login Credential in Manage Underwriter Accounts**
- **Requesting Closing Protection Letters**
- **Voiding a Closing Protection Letter**
- **Accessing the Stewart Access Portal**

Before you start:

1. You will need your **Stewart Access User ID** and **Password** for all states you do business with Stewart in.
2. System Administrator privileges are required to initially input your **Stewart Access** login credentials into TitleDesktop/MagramOnline.

Underwriter Login Credential Initial Setup from User Detail Screen:

1. Enter your **Stewart** login credentials into TitleDesktop/MagramOnline by clicking on “your name” to access the TitleDesktop Administration Menu.

2. Select **User Details**.
3. Select the **User ID** to access the individual’s user settings.

   ![User ID Table]

4. Select the **3rd Party Accounts** tab.

   ![3rd Party Accounts Tab]

5. Using the Underwriter dropdown list select the **Stewart Title** Underwriter Code.  
   **Note:** If using **Stewart Title** and writing in multiple states, login credentials are required for each underwriter code in TitleDesktop/MagramOnline.

   ![Underwriter Dropdown]

6. Enter the user’s login credentials. **User ID** and **Password**.

   ![Login Credentials]

7. Select **Save**.  
   **Note:** Login credentials are required for each Stewart Underwriter Code.
Editing Underwriter Login Credential in Manage Underwriter Accounts:

1. Hover over the To Do dropdown menu, scroll down to Underwriter Services and select **Manage Underwriter Accounts**.

2. Select the Stewart underwriter code from the dropdown.
3. Enter in the Username and Password.
4. Select **Save**.

   **Note:** Login credentials are required for **each** Stewart Underwriter Code.
Requesting Closing Protection Letters

1. Verify on the Application Screen the following sections are complete.
   a. Loan Information
      i. Select the App. Type, Interest, and the Underwriter code.
      ii. Add the Selling Price, Mortgage, Lender and Loan Number, if applicable.

   b. Property Information
      i. The property street address, city, state and zip code.

   c. Buyer/Borrower Names

   d. Add borrower/buyer’s mailing address. The mailing address is a required field.

   e. Seller’s Information, if purchase transaction.

   f. Add seller’s mailing address. The mailing address is a required field, if a purchase transaction.
2. Hover over the To Do tab, select Underwriter Services, then select Underwriter Online Services.

3. The underwriter integration screen will display with the Stewart Title Logo.

4. Verify you are on the CPL tab.

5. Using the radio buttons, select the loan you wish to generate a Closing Protection Letter for.

6. Agency name will display. If there is more than one agency, select the agency from the dropdown list.

   **Agencies:** AccuTitle Test Company

7. Agency address will display. If there is more than one agency address, select the address from the dropdown list.

   **Agency Location:** AccuTitle Test Company - 123 Houston TX 77056

8. Add date of the Closing Protection Letter, if different than today's date.
   a. Closing Protection Letter dates can be no more than 20 days in the past and no more than 7 days into the future.

   **Date:**

9. Select the party being covered from the available dropdown list. Selections will vary by state.

   **Covered Party:** Lender

10. Select the type of CPL form required. Selections will vary by state.

    **Available CPL Forms:** Transaction

11. If an attorney is required for the Closing Protection Letter, select the ellipsis to access the Stewart Approved Attorney list.

    **Approved Attorney:**
    a. Search the attorney by entering the required Stewart Access criteria.
b. **Select Search.**
   
   **Note:** If the attorney does not appear in the list, contact Stewart to have the attorney added to the list.

   ![Attorney Lookup]

   ![Search]

   ![Attorney List]

   ![Search]

   **Note:** The pop-up will close and the attorney’s company name and individual name will populate in to the Approved Attorney and Individual Attorney fields.

   ![Approved Attorney]

   ![Individual Attorney]

   12. Add the lender and successor language using one of two methods.
   
   a. The Lender selected in the Application screen will auto-populate into the Lender field.
      
      i. The Lender’s address, from the phonebook contact, will attach to the Lender name to populate on the Closing Protection Letter.
      
      ii. The Lender’s successor language, from the phonebook contact, will display if it is an exact match to Stewart’s successor language. If it is not an exact match, select the success language from the available list.

   ![Lender]

   ![Successor Language]

   b. **Select** the lender using the Stewart Access lender list.
      
      i. Select the ellipsis on the Lender field.
      
      ![Lender](ABC Mortgage Corp Sample LLC)

      ![ellipsis]

      ii. Search the lender by entering the required Stewart Access criteria.
      
      iii. **Select** Search.

      **Note:** If the lender does not appear in the list, contact Stewart to have the lender added to the list.

   ![Lender Lookup]

   ![Search]
iv. Select the lender.

<table>
<thead>
<tr>
<th>Lender Name</th>
<th>BranchName</th>
<th>Mailing Address</th>
<th>City</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAA Lender Company</td>
<td></td>
<td>AAA Lender Address1</td>
<td>AAA Lender City</td>
<td>NJ</td>
</tr>
<tr>
<td>BankOfKaty</td>
<td>NEW Branch</td>
<td>102 Aubry Rose Ln</td>
<td>Katy</td>
<td>TX</td>
</tr>
<tr>
<td>BankOfNewJersey</td>
<td>NEW Branch</td>
<td>123 Edison Street</td>
<td>Elizabeth</td>
<td>TX</td>
</tr>
<tr>
<td>BankOfTexas</td>
<td>NEW Branch</td>
<td>10002 Gage Daniel Ln</td>
<td>Cypress</td>
<td>TX</td>
</tr>
<tr>
<td>Capital One, N.A.</td>
<td>FRY ROAD</td>
<td>20003 Fm 329 Rd</td>
<td>Cypress</td>
<td>TX</td>
</tr>
</tbody>
</table>

**Note:** The pop-up will close and the Lender name will populate into the Lender field.

v. The Lender’s address, from Stewart Access lender contact, will attach to the Lender name to populate on the Closing Protection Letter.

vi. Select the Lender successor language from the available list.

13. Select the **Request CPL** button.

**Note:** The Closing Protection Letter will download from **Stewart Access** and the Closing Protection Letter document will be added to the file’s Document Screen automatically.
**Voiding a Closing Protection Letter**

1. Select the “X” on the line item of the Closing Protection Letter to be canceled.

   ![Image of CPL screen](image)

2. Select the reasoning for voiding the CPL from the dropdown menu.

   ![Image of void CPL dropdown](image)

3. Select Void CPL.

4. The item will be updated to a status of canceled and reflect a voided date.

   ![Updated CPL table](image)

   **Note:** When the item is voided it will be deleted from the Document Screen.
Accessing the Stewart Access Portal:

The Stewart Access Portal can be accessed directly from within TitleDesktop/MagramOnline. Select the Stewart logo or select the link within Underwriter Online Services.

Use Stewart Access Portal to:

- Requesting Closing Protection Letters for multiple properties
- Revising a Closing Protection Letter
- Requesting Policy Jackets for multiple properties
- Revising a Policy Jacket
- Deleting an endorsement

Please contact the Stewart Customer Care Center at customercare@stewart.com or (877) 800-3132 and press Option 4 for Stewart Access. For education and training, refer to the Stewart Access Training Center.