

Stewart Title

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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	First Name	Last Name
User	FirstName	LastName

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

Detail Signature Email Calendar **3rd Party Accounts**

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/MagranOnline.

Detail Signature Email Calendar **3rd Party Accounts** State Lic

Type: Underwriter Web Services

Underwriter: **Stewart Title Guaranty Company (ST)**

User ID: Stewart Title Guaranty Company(ST)
Stewart Title Insurance Company(ST-NY)

Password:

Agent / Other ID:

Agent / Password:

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

Detail Signature Email Calendar 3rd Party Accounts **State Licenses**

Type: Underwriter Web Services

Underwriter: Stewart Title Guaranty Company(ST)

User ID: UserID

Password: Password

Agent / Other ID:

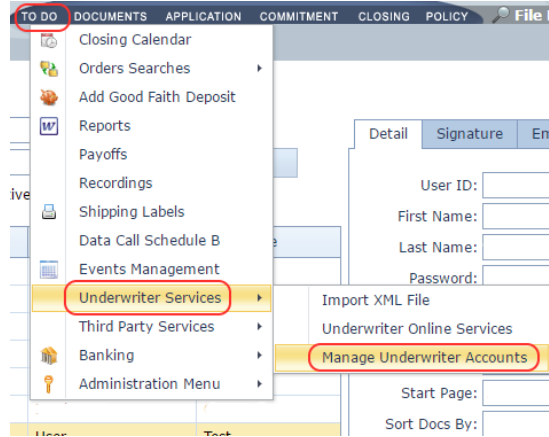
Agent / Password:

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.

A screenshot of the 'Maintain Underwriter Accounts' form. The 'Select Party:' dropdown menu is set to 'Stewart Title Guarant' and is highlighted with a red arrow. Below it, the 'User ID:' and 'Password:' fields are highlighted with red boxes. There are also fields for 'Agent / Other ID:' and 'Agent / Password:'. A 'Save' button is highlighted with a red box at the bottom of the form.

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.

Loan Information		Edit
App. Type:	Purchase	Underwriter: ST
Interest:	Fee Simple	
Selling Price:	\$300,000.00	Owners Ins.: \$300,000.00
Mortgage:	\$285,000.00	Lender Ins.: \$285,000.00
Lender:	ABC Mortgage Corp Sample LLC	
Loan #:	11111	

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

Property Information			Edit
County:	Burlington	Municipality:	Township of Moorestown
Block:	32	Lot:	1 Qual:
Address:	7 Hilltop Court City NJ, 08050		
Prop. Type:	Residential	Res. Type:	1 Family

- c. Buyer/Borrower Names

Borrower / Buyer / Grantee		Edit
1.	Bob Buyer	
2.	Bess Buyer	
Name:	Bob Buyer and Bess Buyer	

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

Name:	<input type="text" value="Bob Buyer and Bess Buyer"/>
Mailing Address	<input type="text" value="1 Woodstream Ct.
Medford, NJ 08055"/>

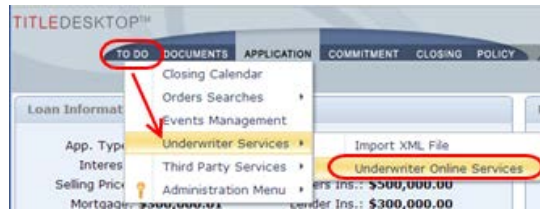
- e. Seller's Information, if purchase transaction.

Seller / Grantor		Edit
1.	Sam Seller	
2.	Stevie Seller	
Name	Sam Seller and Stevie Seller	

- f. Add seller's mailing address. The mailing address is a required field, if a purchase transaction.

Name:	<input type="text" value="Sam Seller and Stevie Seller"/>
Mailing Address	<input type="text" value="7 Heron Court
City, NJ 08050"/>

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.

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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.

Please Select Loan: L11111 L2222

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

Agencies:

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

Agency Location:

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:

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

Available CPL Forms:

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 ⌵

Name: At least one of Approved Attorney Name (minimum first three characters), Approved Attorney City or Approved Attorney Postal Code are required

City:

State:

Zip:

Country: **USA**

c. Select the attorney.

Attorney Lookup ⌵

Name: At least one of Approved Attorney Name (minimum first three characters), Approved Attorney City or Approved Attorney Postal Code are required

City:

State:

Zip:

Country: **USA**

Attorney Name	Mailing Address	City	State
The Law Offices of Brad C. Allen, P.C.	190 Moore Street Suite 204	Hackensack	NJ
Cole, Schotz, Meisel, Forman & Leonard	25 Main Street	Hackensack	NJ

Page 1 of 1 (2 items) ⏪ 1 ⏩

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: ⋮

- 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 ⌵

Name: Either Lender Postal Code or Lender Name (minimum first three characters), Lender State and Lender City are required

City:

State:

Zip:

Country: **USA**

iv. Select the lender.

Lender Name	BranchName	Mailing Address	City	State
AAA Lender Company		AAA Lender Address1 AAA Lender Address2	AAA Lender City	NJ
BankOfKaty	NEW Branch	102 Aurby Rose Ln	Katy	TX
BankOfNewJersy	NEW Branch	123 Edision Street	Elizabeth	TX
BankOfTexas	NEW Branch	10002 Gage Daniel Ln	Cypress	TX
Capital One, N.A.	FRY ROAD	20503 Fm 529 Rd	Cypress	TX

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.

Lender: ...

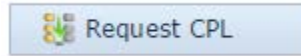
Successor Language:

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

Successor Language:

- Select --
- As Their Interests May Appear
- ATIMA

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.

CPL Jacket Post Policy Endorsements

Agencies: -- Select --

Agency Location:

Covered Party: Lender

Available CPL Forms:

Approved Attorney:

Individual Attorney:

Lender: AAA Lender Company

Successor Language: Its Successors And/Or Assigns

Request CPL

	Description	Reference	Status	Date Downloaded	Date Voided
	CPL 109910554	1-1TFRIY	Issued	4/5/2017 4:26:00 PM	
	CPL 109910284	1-1TFRBG	Issued	4/5/2017 4:01:00 PM	

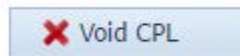
2. Select the reasoning for voiding the CPL from the dropdown menu.

Void Item

Reason: Coverage Declined

- Coverage Declined
- Created in Error
- Duplicate
- No longer applies

3. Select Void CPL.




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

	Description	Reference	Status	Date Downloaded	Date Voided
	CPL 109916734	1-1TFWAM	Issued	4/5/2017 4:44:00 PM	
	CPL 109910554	1-1TFRIY	Cancelled	4/5/2017 4:26:00 PM	4/5/2017 4:45:00 PM

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/MagnumOnline. Select the Stewart logo  or select the link [Stewart Access Portal, Click Here](#) 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 customer care@stewart.com or (877) 800-3132 and press Option 4 for Stewart Access. For education and training, refer to the [Stewart Access Training Center](#).