Stewart Title

stewart

Stewart Title Guaranty Company and Stewart Title Insurance Company

Policy Jacket Integration

Overview:

TitleDesktop/MagramOnline has been integrated with the **Stewart Title Guaranty Company and Stewart Title Insurance Company's**, Stewart Access Portal **(ST)**, to enable users to retrieve Policy Jackets without leaving TitleDesktop/MagramOnline.

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

Table of Contents:

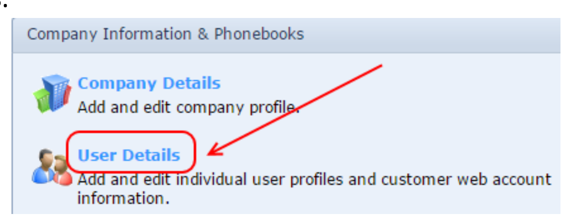
Before you start:

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.

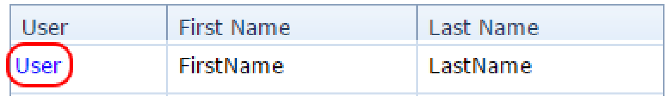
Underwriter Login Credential Initial Setup from User Detail Screen:

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

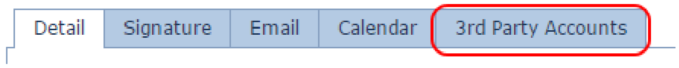
2. Click on **User Details**.



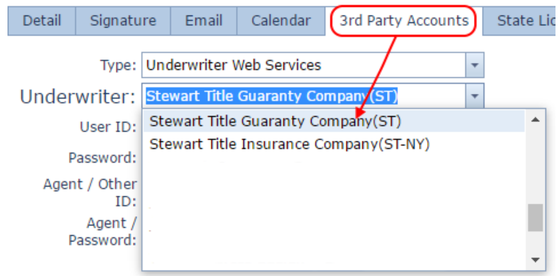
3. Select the User ID to access the individual's user settings.



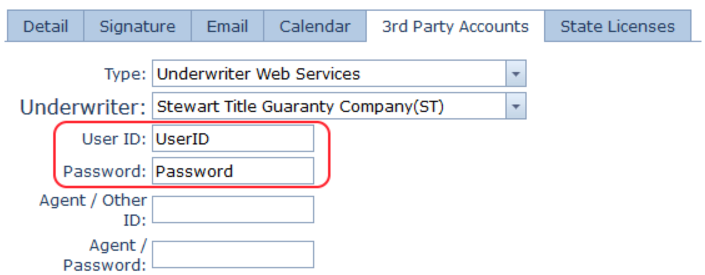
4. Select the 3rd **Party Accounts** tab.



5. Using the Underwriter dropdown arrow 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.



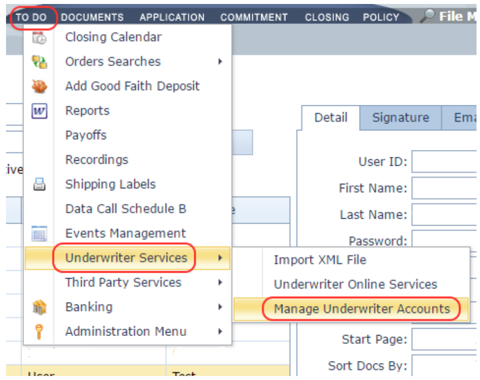
6. Enter the user's login credentials. **__User ID__** and **__Password__**.



7. Select **Save**.
Note: Login credentials are required for __each__ Stewart Underwriter Code.

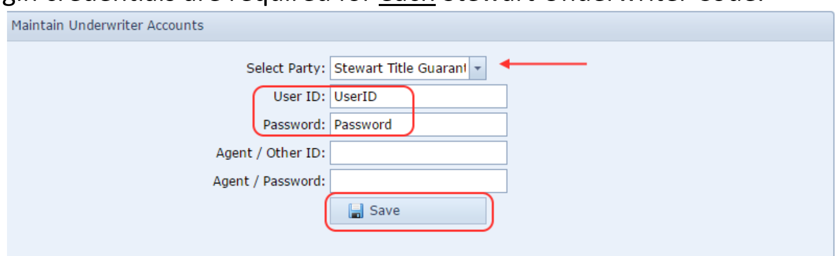
Editing Underwriter Login Credential in Manage Underwriter Accounts:

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



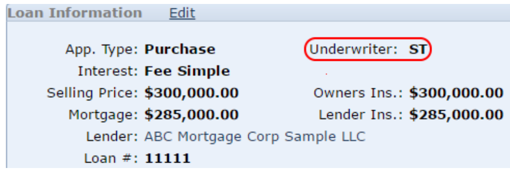
2. Select the Stewart underwriter code from the dropdown.
3. Enter in the Username and Password.
4. Select Save.

   Note: Login credentials are required for <u>each</u> Stewart Underwriter Code.

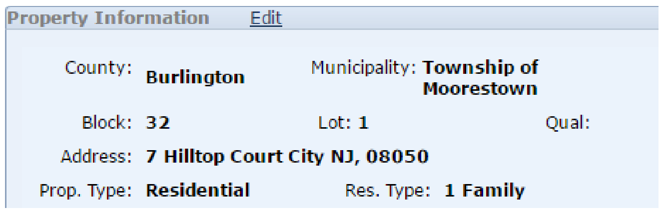


Requesting Policy Jackets

1. Verify on the Application Screen the following sections are filled in.
    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.

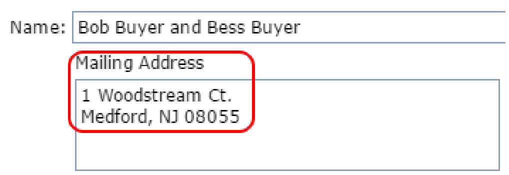


    b. Property Information
        i. The property street address, city, state and zip code.

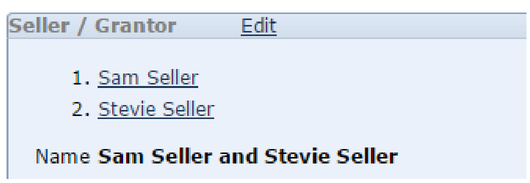


    c. Buyer/Borrower Names

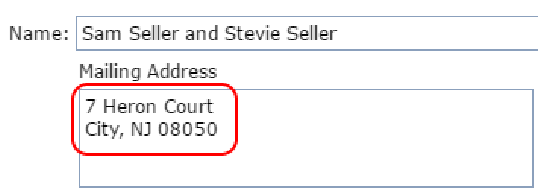
    d. Add borrower/buyer's mailing address. The mailing address is a required field.



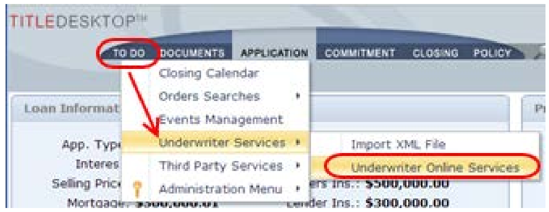
    e. Seller's Information, if purchase transaction.



    a. 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.

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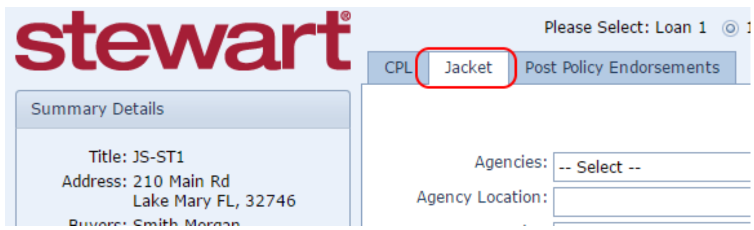
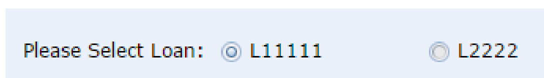
Requesting Lender's Policy Jacket

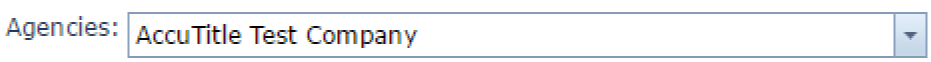
1. Select the **Jacket** tab.



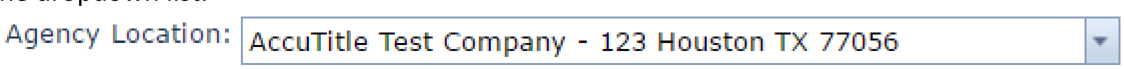
2. Using the radio buttons, select the loan you wish to generate a Policy Jacket for.



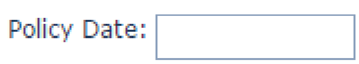
3. Agency name will display. If there is more than one agency, select the agency from the dropdown list.



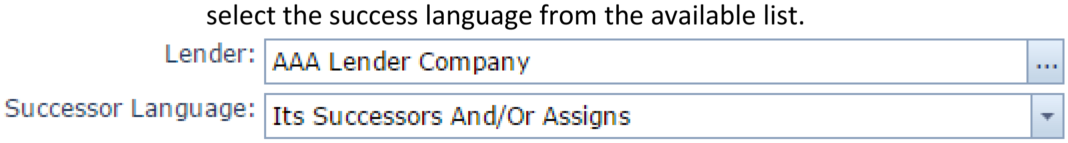
4. Agency address will display. If there is more than one agency address, select the address from the dropdown list.



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

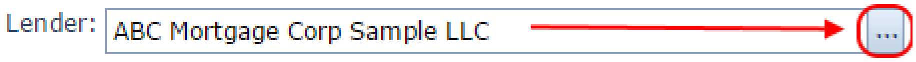


6. Add the lender and successor language using one of two methods:
   a. The Lender selected in the Application screen will auto-populate into the Lender field.
      i. The Lender's successor language, from the phonebook contact, will display if it is an exact match to Stewart's successor language. If it is not an exact match, select the success language from the available list.



b. Select the lender using the Stewart Access lender list.

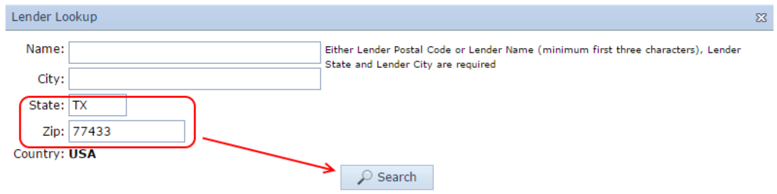
i. Select the ellipsis on the Lender field.



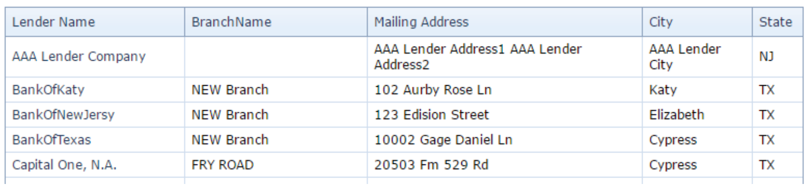
ii. Search the lender by entering the required Stewart Access criteria.

iii. Select **Search**.

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



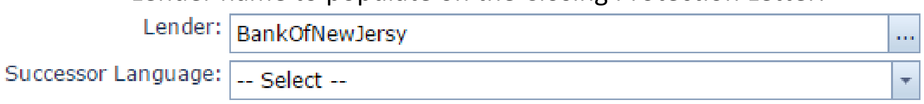
iv. Select the lender.



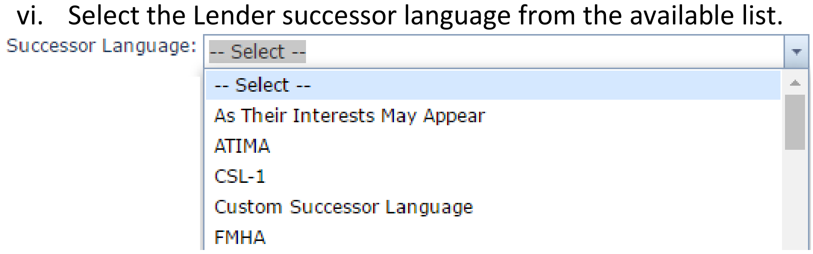
Lender Name	BranchName	Mailing Address	City	State
AAA Lender Company		AAA Lender Address1 AAA Lender Address2	AAA Lender City	NJ
BankOfKaty	NEW Branch	102 Aurby Rose Ln	Katy	TX
BankOfNewJersy	NEW Branch	123 Edision Street	Elizabeth	TX
BankOfTexas	NEW Branch	10002 Gage Daniel Ln	Cypress	TX
Capital One,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

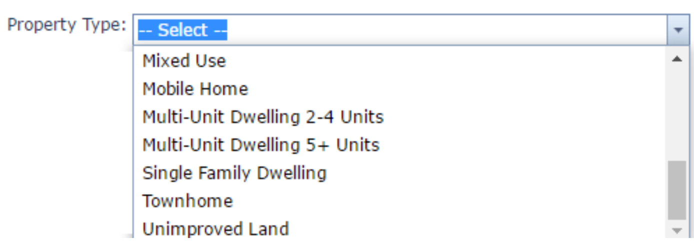
v. The Lender's address, from Stewart Access lender contact, will attach to the Lender name to populate on the Closing Protection Letter.



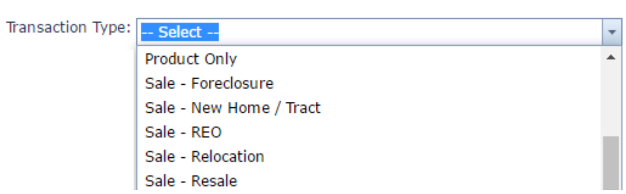
vi. Select the Lender successor language from the available list.



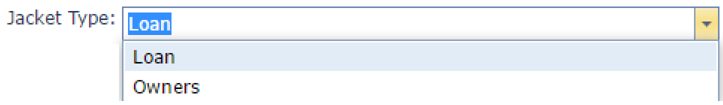
7. Select Property Type.



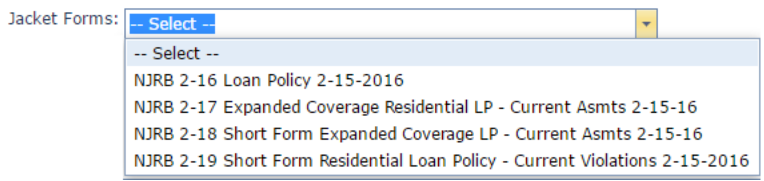
8. Select Transaction Type.



9. Select a Jacket Type. Selections vary by state.
Note: If a simultaneous issue, always add the Lender's Policy prior to adding the Owner's Policy.

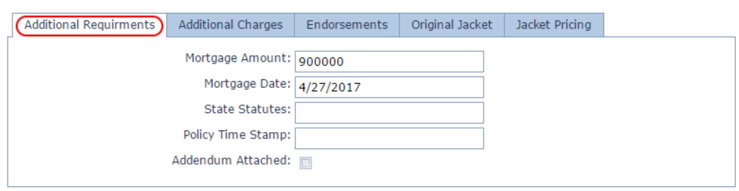


10. Select a Jacket Form. Selections vary by state.



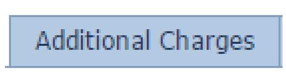
11. Select the **Additional Requirements** tab, if presented.

   a. If a Short Form Loan Policy is selected, the Mortgage Amount and Closing Date will update from the Application screen. This screen may vary by state.

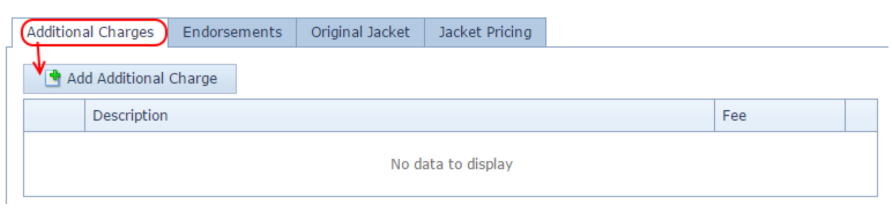


   b. Add State Statutes.
   c. Add Policy Time Stamp.
   d. Select the **Addendum Attached** selection box, if you wish to include an addendum.
   Note: Short Form Addendums are made available for edit in Documents.

12. Select the **Additional Charges** tab to add additional charges, if applicable. The Additional Charges tab will only display for allowable states.

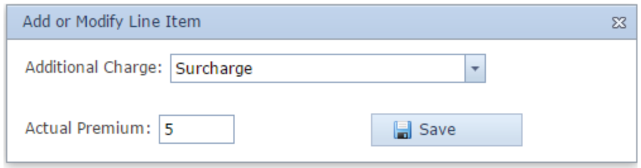


13. Select the **Add Additional Charge** button.



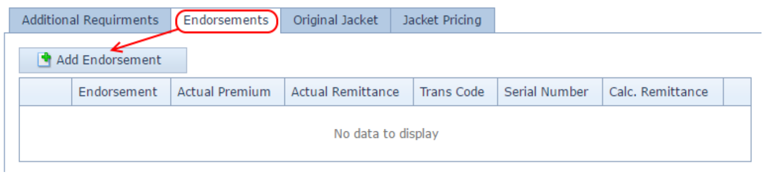
14. Using the Additional Charge dropdown, select the charge to be added, if applicable.

15. Add the amount to be charged.

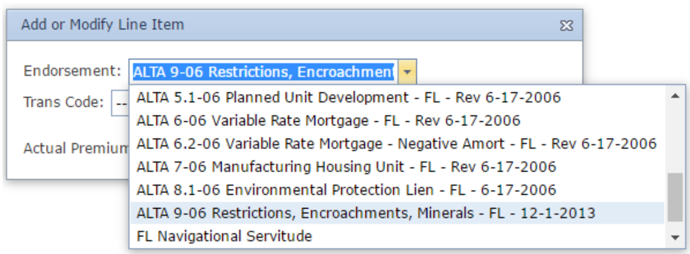


16. Select **Save**.
17. Select the **Endorsement** tab.

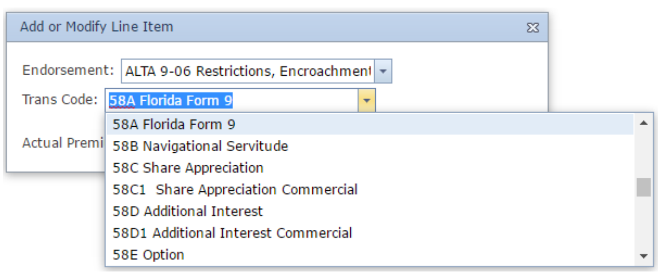
18. Select **Add Endorsement**.



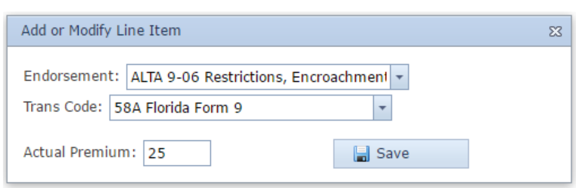
19. Select and add each endorsement that applies from the list of available Endorsements.



20. Select and add the Stewart assigned Trans Code for each endorsement selected.



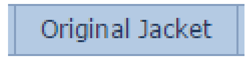
21. Add the Endorsement Premium/Charge.



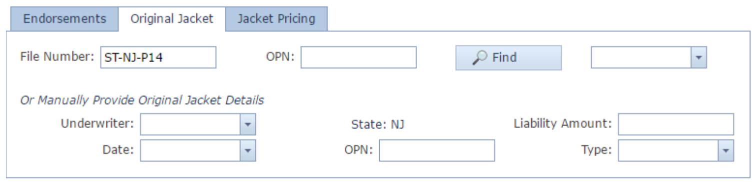
Note: If the endorsement premium/charge is different than shown, provide the actual premium.

22. Select **Save**.

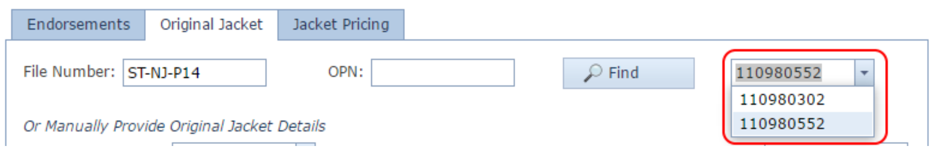
23. Select the **Original Jacket** tab, if a prior policy is applicable.



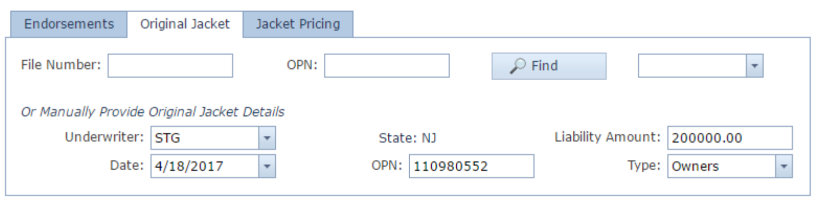
a. Provide the File Number or the Original Policy Number.
b. Select **Find.**



c. Select the applicable Policy Number.

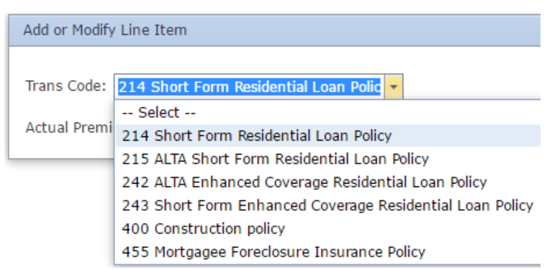


d. Or manually provide the Original Jacket Details.

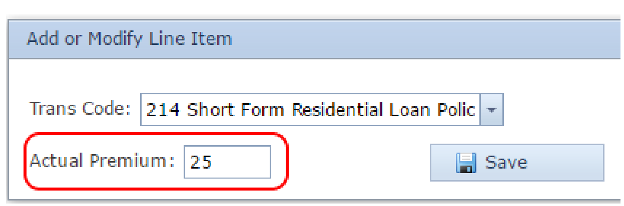


24. Selected the **Jacket Pricing** tab.

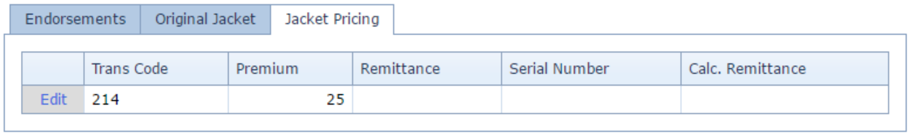
25. Select **Edit**.
26. Select the Policy Trans code from dropdown list.



27. Provide the Premium for the Policy Jacket selected.

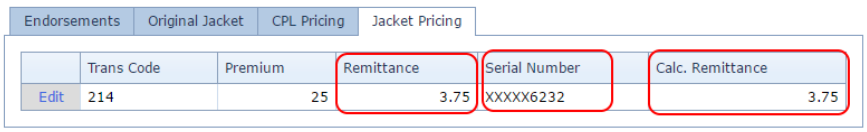


28. Select **Save**.



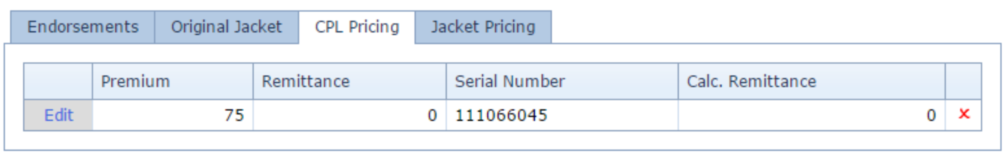
29. Click **Save Draft**.
    Note: A copy of the Draft Jacket will be saved in the file documents.

30. The Remittance Amount, Serial Number and Calculated Remittance will be presented.

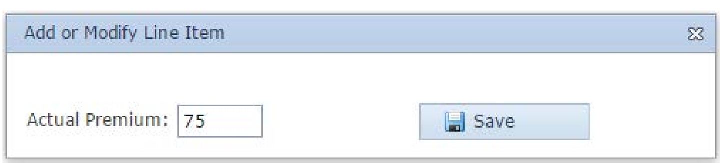


31. Verify the Jacket Remittance.
32. If remittance for this file is different then returned from Stewart, edit Remittance.
    a. Select **Edit** on the Jacket Pricing tab and select **Save**.
33. The CPL Pricing tab will display if a Closing Protection Letter was added to this file.

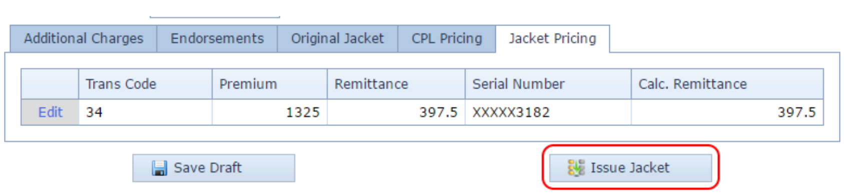
34. Verify the CPL Premium.



35. If CPL Premium is different for this file, then select edit and provide the actual CPL Premium.

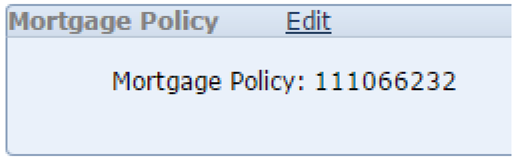


36. Click **Save.**
    a. If the CPL Premium was edited then Click **Save Draft**, otherwise move to next step.
37. Click the **Issue Jacket** button.



Note: The Jacket will download from **Stewart Access** and the TitleDesktop/MagramOnline PDF viewer will open to the Jacket document. The Jacket document will be added to the file's Document Screen automatically.

Policy jacket requests will automatically enter the Jacket Number into the corresponding TitleDesktop/MagramOnline field(s) on the Policy Screen.

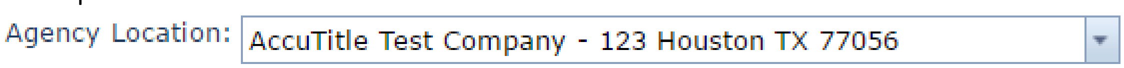


38. Return to Underwriter Online Services to add Owners Jacket.

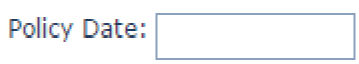
Requesting Owner's Policy Jacket

1. Click **Jacket** tab.
2. Select Jacket Type of **Owners**.
3. Select a Jacket Form. Selections vary by state.
4. Agency name will display. If there is more than one agency, select the agency from the dropdown list.

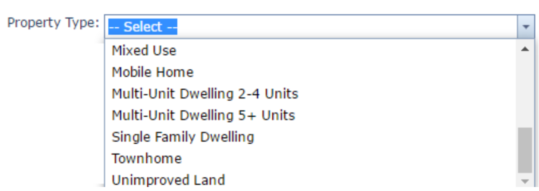
5. Agency address will display. If there is more than one agency address, select the address from the dropdown list.



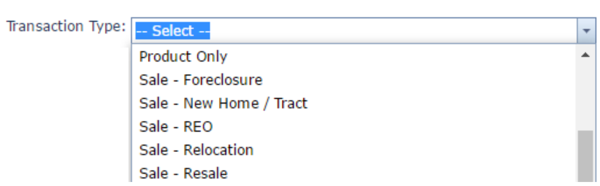
6. Add date of the Policy, if different than today's date.
   a. Policy dates can be no more than 20 days in the past and no more than 7 days into the future.



7. If a simultaneous transaction, the Lender and Lender's successor language will default into the applicable fields.
8. Select Property Type.

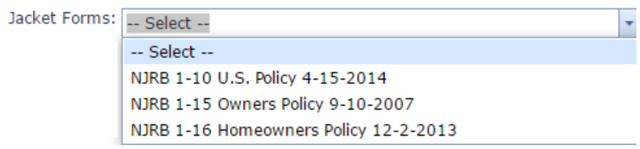


9. Select Transaction Type.

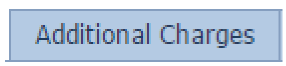


10. Select a Jacket Type. Selections vary by state.
    Note: If a simultaneous issue, <u>always</u> add the Lender's Policy prior to adding the Owner's Policy.

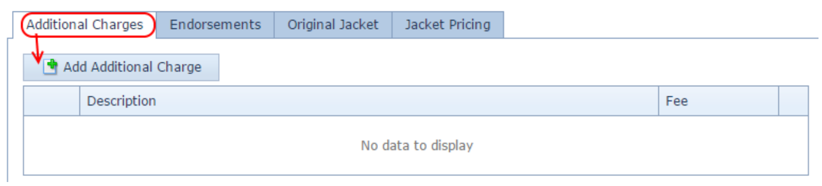
11. Select a Jacket Form. Selections vary by state.



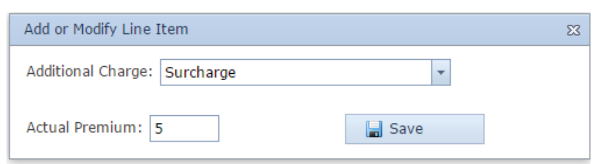
12. Click the Additional Charges Tab to add additional charges, if applicable. The Additional Charges tab will display for allowable states.



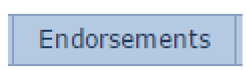
13. Click the **Add Additional Charge** button.



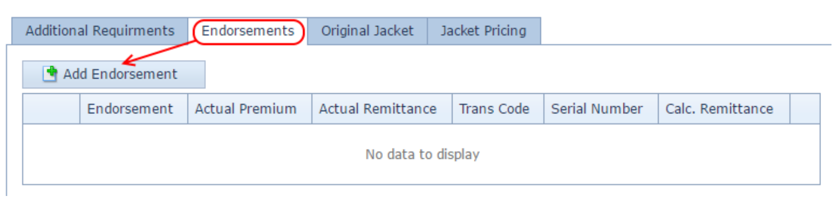
14. Using the Additional Charge dropdown, select the charge to be added, if applicable.
15. Add the amount to be charged.



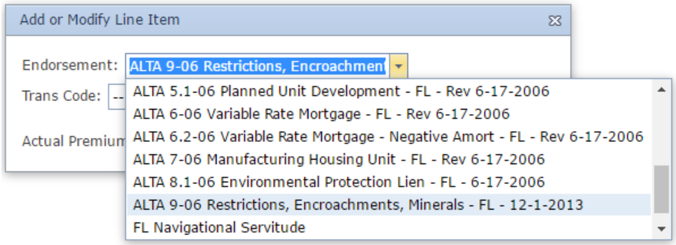
16. Select **Save**.
17. Select the **Endorsement** tab.



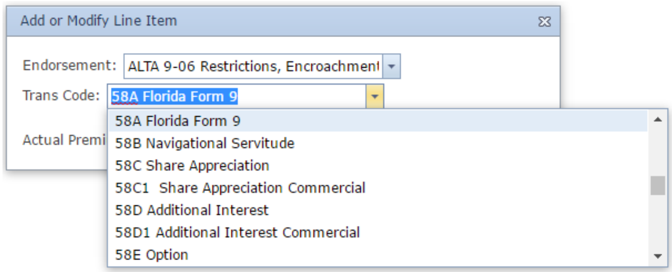
18. Select **Add Endorsement**.



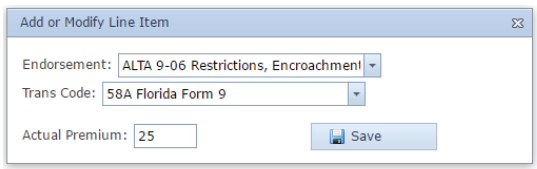
19. Select and add each endorsement that applies from the list of available Endorsements.



20. Select and add the Stewart assigned Trans Code for each endorsement selected.

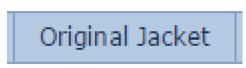


21. Add the Endorsement Premium/Charge.

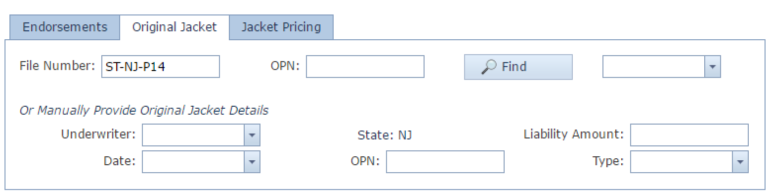


Note: If the endorsement premium/charge is different than shown, provide the actual premium.

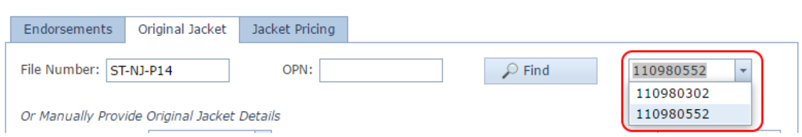
22. Select **Save**.
23. Select the **Original Jacket** tab, if a prior policy is applicable.



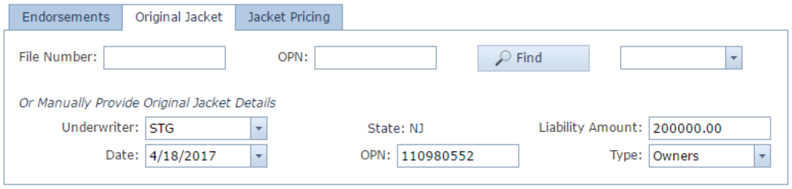
a. Provide the File Number or the Original Policy Number.
b. Select **Find.**



c. Select the applicable Policy Number.

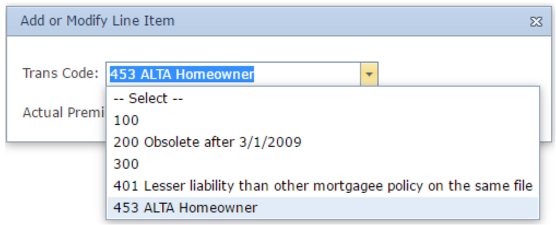


d. Or manually provide the Original Jacket Details.

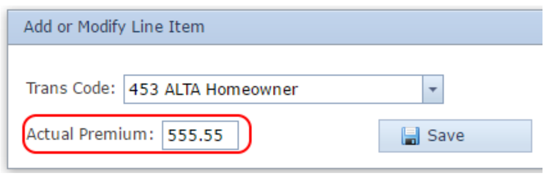


24. Select the **Jacket Pricing** tab.

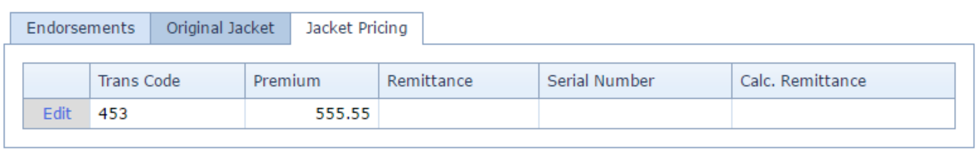
25. Select **Edit**.
26. Select the Policy Trans code from dropdown list.



27. Provide the Premium for the Policy Jacket selected.

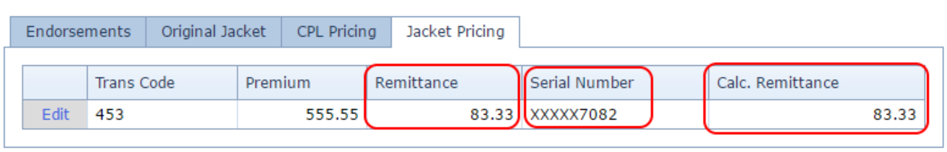


28. Select **Save.**



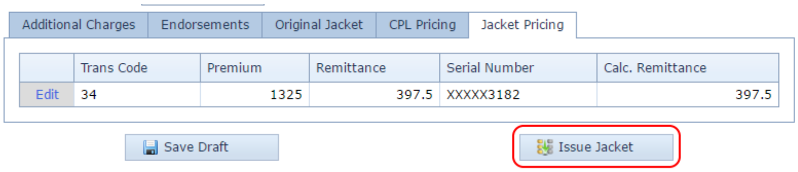
29. Select **Save Draft**.
    Note: A copy of the Draft Jacket will be saved in the file documents.

30. The Remittance Amount, Serial Number and Calculated Remittance will be presented.



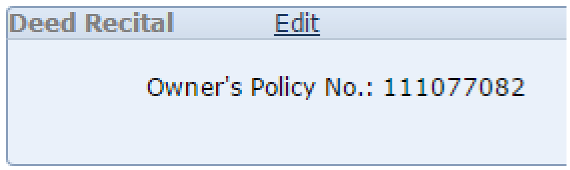
31. Verify the Jacket Remittance.
32. If remittance for this file is different then returned from Stewart, edit Remittance.
    a. Select **Edit** on the Jacket Pricing tab and select **Save**.

33. Select the **Issue Jacket** button.



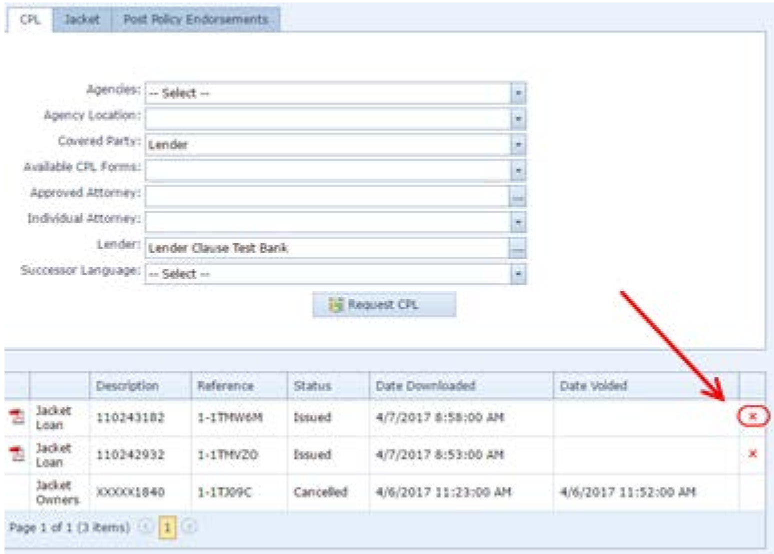
Note: The Jacket will download from **Stewart Access** and the TitleDesktop/MagramOnline PDF viewer will open to the Jacket document. The Jacket document will be added to the file's Document Screen automatically.

Policy jacket requests will automatically enter the Jacket Number into the corresponding TitleDesktop/MagramOnline field(s) on the Policy Screen.

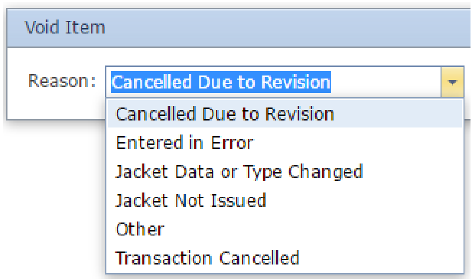


Voiding a Policy Jacket

1. Select the "**X**" on the line item of the Policy Jacket to be voided.

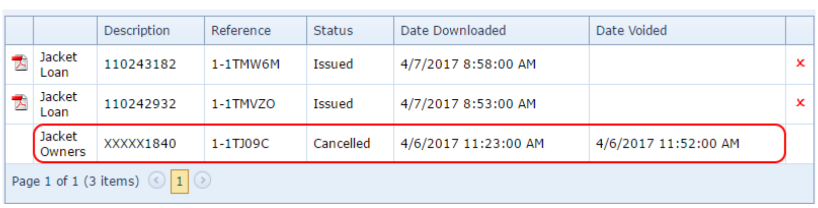


2. Select the reasoning for cancelling the Jacket from the dropdown menu.



3. Select **Void Jacket.**

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



Description		Reference	Status	Date Downloaded	Date Voided
Jacket Loan	110243182	1-1TMW6M	Issued	4/7/2017 8:58:00 AM	
Jacket Loan	110242932	1-1TMVZO	Issued	4/7/2017 8:53:00 AM	
Jacket Owners	XXXXX1840	1-1TJ09C	Cancelled	4/6/2017 11:23:00 AM	4/6/2017 11:52:00 AM

Page 1 of 1 (3 items) 1

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 stewart 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 (877) 800-3132 or email CustomerCare@Stewart.com for Stewart Title related questions.