

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.

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Before you start:

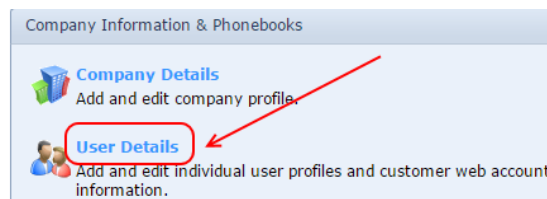
1. You will need your **Stewart Access User ID** and **Password** for all states you do business with **Stewart** in.
2. System Administrator privileges are required to initially input your **Stewart Access** login credentials into TitleDesktop/MagramOnline.

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.

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 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.

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:

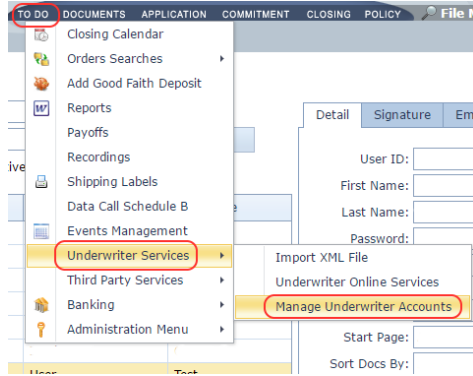
Agent / Password:

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 a web form titled 'Maintain Underwriter Accounts'. The form contains several input fields and a button. At the top, there is a dropdown menu labeled 'Select Party:' with the value 'Stewart Title Guarant...' and a red arrow pointing to it. Below this are two input fields: 'User ID:' with the value 'UserID' and 'Password:' with the value 'Password', both highlighted with red circles. There are also two empty input fields labeled 'Agent / Other ID:' and 'Agent / Password:'. At the bottom of the form is a blue button labeled 'Save' with a floppy disk icon, also highlighted with a red circle.

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.

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"/>

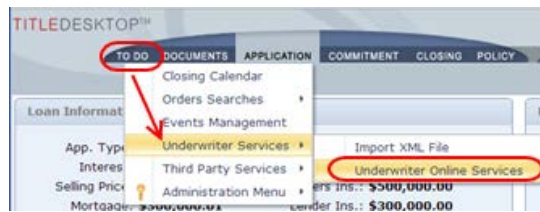
- e. Seller's Information, if purchase transaction.

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

- a. 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**.

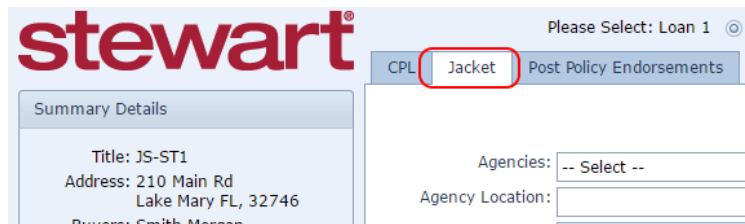


3. The underwriter integration screen will display with the **Stewart** Title Logo.

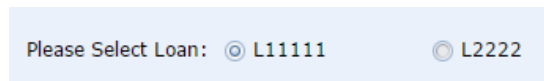


Requesting Lender's Policy Jacket

1. Select the **Jacket** tab.



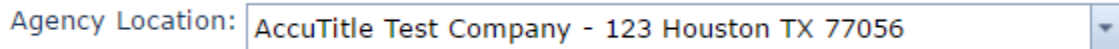
2. Using the radio buttons, select the loan you wish to generate a Policy Jacket for.



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



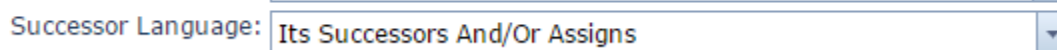
4. Agency address will display. If there is more than one agency address, select the address from the dropdown list.



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.

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 E3

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
- CSL-1
- Custom Successor Language
- FMHA

7. Select Property Type.

Property Type:

- Mixed Use
- Mobile Home
- Multi-Unit Dwelling 2-4 Units
- Multi-Unit Dwelling 5+ Units
- Single Family Dwelling
- Townhome
- Unimproved Land


8. Select Transaction Type.

Transaction Type:


- Product Only
- Sale - Foreclosure
- Sale - New Home / Tract
- Sale - REO
- Sale - Relocation
- Sale - Resale

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.

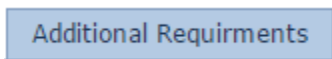
Jacket Type: 

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

Jacket Forms: 

NJR 2-16 Loan Policy 2-15-2016
NJR 2-17 Expanded Coverage Residential LP - Current Asmts 2-15-16
NJR 2-18 Short Form Expanded Coverage LP - Current Asmts 2-15-16
NJR 2-19 Short Form Residential Loan Policy - Current Violations 2-15-2016

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.

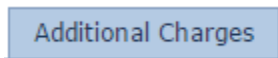
Additional Requirements | Additional Charges | Endorsements | Original Jacket | Jacket Pricing

Mortgage Amount:
Mortgage Date:
State Statutes:
Policy Time Stamp:
Addendum Attached:

- b. Add State Statutes.
- c. Add Policy Time Stamp.
- d. Select the **Addendum Attached** selection box, if you wish to include an addendum.

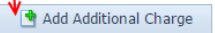
Note: Short Form Addendums are made available for edit in Documents.

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.

Additional Charges | Endorsements | Original Jacket | Jacket Pricing



Description	Fee
No data to display	

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

15. Add the amount to be charged.

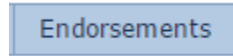
Additional Charge: Surcharge

Actual Premium: 5

Save

16. Select **Save**.

17. Select the **Endorsement** tab.



18. Select **Add Endorsement**.

Additional Requirements | **Endorsements** | Original Jacket | Jacket Pricing

Add Endorsement

Endorsement	Actual Premium	Actual Remittance	Trans Code	Serial Number	Calc. Remittance
No data to display					

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

Endorsement: ALTA 9-06 Restrictions, Encroachment

Trans Code: --

Actual Premium: --

- ALTA 5.1-06 Planned Unit Development - FL - Rev 6-17-2006
- ALTA 6-06 Variable Rate Mortgage - FL - Rev 6-17-2006
- ALTA 6.2-06 Variable Rate Mortgage - Negative Amort - FL - Rev 6-17-2006
- ALTA 7-06 Manufacturing Housing Unit - FL - Rev 6-17-2006
- ALTA 8.1-06 Environmental Protection Lien - FL - 6-17-2006
- ALTA 9-06 Restrictions, Encroachments, Minerals - FL - 12-1-2013**
- FL Navigational Servitude

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

Endorsement: ALTA 9-06 Restrictions, Encroachment

Trans Code: 58A Florida Form 9

Actual Premium: --

- 58A Florida Form 9
- 58B Navigational Servitude
- 58C Share Appreciation
- 58C1 Share Appreciation Commercial
- 58D Additional Interest
- 58D1 Additional Interest Commercial
- 58E Option

21. Add the Endorsement Premium/Charge.

Endorsement: ALTA 9-06 Restrictions, Encroachment

Trans Code: 58A Florida Form 9

Actual Premium: 25

Save

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.

Original Jacket

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

Endorsements Original Jacket Jacket Pricing

File Number: OPN: Find

Or Manually Provide Original Jacket Details

Underwriter: State: NJ Liability Amount:

Date: OPN: Type:

- c. Select the applicable Policy Number.

Endorsements Original Jacket Jacket Pricing

File Number: OPN: Find

Or Manually Provide Original Jacket Details

110980552
110980302
110980552

- d. Or manually provide the Original Jacket Details.

Endorsements Original Jacket Jacket Pricing

File Number: OPN: Find

Or Manually Provide Original Jacket Details

Underwriter: State: NJ Liability Amount:

Date: OPN: Type:

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

Jacket Pricing

25. Select **Edit**.

26. Select the Policy Trans code from dropdown list.

Add or Modify Line Item

Trans Code:

Actual Premi

-- Select --
214 Short Form Residential Loan Policy
215 ALTA Short Form Residential Loan Policy
242 ALTA Enhanced Coverage Residential Loan Policy
243 Short Form Enhanced Coverage Residential Loan Policy
400 Construction policy
455 Mortgagee Foreclosure Insurance Policy

27. Provide the Premium for the Policy Jacket selected.

Add or Modify Line Item

Trans Code:

Actual Premium:

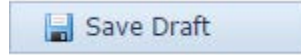
Save

28. Select **Save**.

	Trans Code	Premium	Remittance	Serial Number	Calc. Remittance
Edit	214	25			

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.

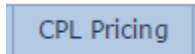
	Trans Code	Premium	Remittance	Serial Number	Calc. Remittance
Edit	214	25	3.75	XXXXX6232	3.75

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.

	Premium	Remittance	Serial Number	Calc. Remittance	
Edit	75	0	111066045	0	x

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

Add or Modify Line Item

Actual Premium:

Save

36. Click **Save**.

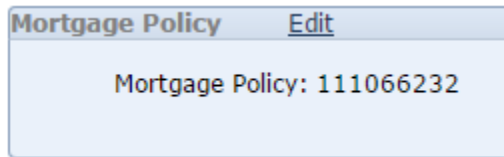
a. If the CPL Premium was edited then Click **Save Draft**, otherwise move to next step.

37. Click the **Issue Jacket** button.

	Trans Code	Premium	Remittance	Serial Number	Calc. Remittance
Edit	34	1325	397.5	XXXXX3182	397.5

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.

Agencies:

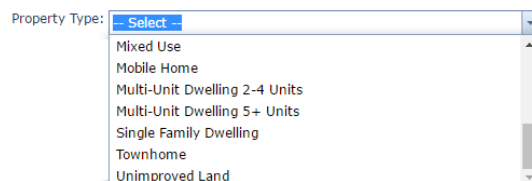
5. Agency address will display. If there is more than one agency address, select the address from the dropdown list.

Agency Location:

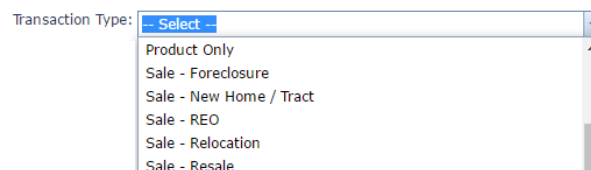
6. Add date of the Policy, if different than today's date.
 - a. Policy dates can be no more than 20 days in the past and no more than 7 days into the future.

Policy Date:

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, always add the Lender's Policy prior to adding the Owner's Policy.

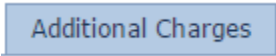
Jacket Type:

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

Jacket Forms:

- Select --
- NJRB 1-10 U.S. Policy 4-15-2014
- NJRB 1-15 Owners Policy 9-10-2007
- NJRB 1-16 Homeowners Policy 12-2-2013

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.

Additional Charges | Endorsements | Original Jacket | Jacket Pricing

Description	Fee
No data to display	

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

15. Add the amount to be charged.

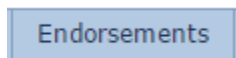
Add or Modify Line Item

Additional Charge:

Actual Premium:

16. Select **Save**.

17. Select the **Endorsement** tab.

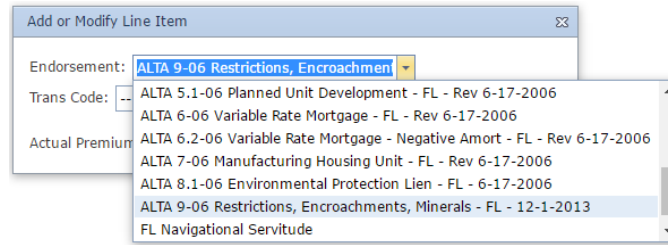


18. Select **Add Endorsement**.

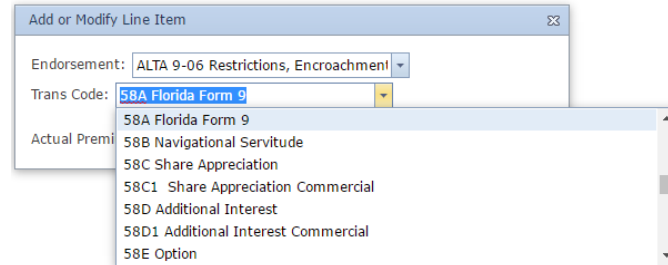
Additional Requirments | **Endorsements** | Original Jacket | Jacket Pricing

Endorsement	Actual Premium	Actual Remittance	Trans Code	Serial Number	Calc. Remittance
No data to display					

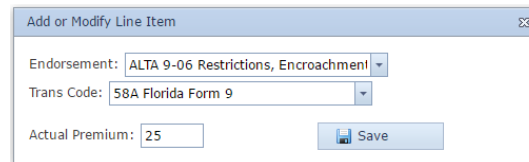
19. Select and add each endorsement that applies from the list of available Endorsements.



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



21. Add the Endorsement Premium/Charge.



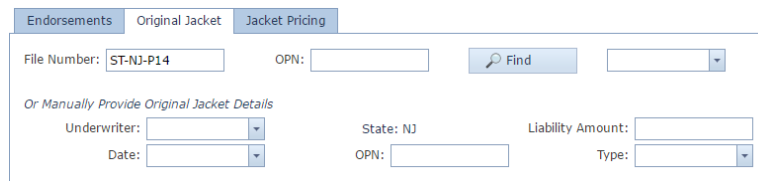
Note: If the endorsement premium/charge is different than shown, provide the actual premium.

22. Select **Save**.

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

Original Jacket

- 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.

Endorsements Original Jacket Jacket Pricing

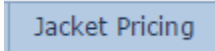
File Number: OPN: Find

Or Manually Provide Original Jacket Details

Underwriter: State: NJ Liability Amount:

Date: OPN: Type:

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



25. Select **Edit**.

26. Select the Policy Trans code from dropdown list.

Add or Modify Line Item

Trans Code:

Actual Premi

- Select --
- 100
- 200 Obsolete after 3/1/2009
- 300
- 401 Lesser liability than other mortgagee policy on the same file
- 453 ALTA Homeowner

27. Provide the Premium for the Policy Jacket selected.

Add or Modify Line Item

Trans Code:

Actual Premium:

Save

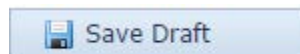
28. Select **Save**.

Endorsements Original Jacket Jacket Pricing

	Trans Code	Premium	Remittance	Serial Number	Calc. Remittance
Edit	453	555.55			

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.

Endorsements Original Jacket CPL Pricing Jacket Pricing

	Trans Code	Premium	Remittance	Serial Number	Calc. Remittance
Edit	453	555.55	83.33	XXXXX7082	83.33

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.

Additional Charges		Endorsements		Original Jacket		CPL Pricing		Jacket Pricing	
	Trans Code	Premium	Remittance	Serial Number	Calc. Remittance				
Edit	34	1325	397.5	XXXXX3182	397.5				

[Save Draft](#) [Issue Jacket](#)

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.

Deed Recital	Edit
Owner's Policy No.: 111077082	

Voiding a Policy Jacket

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

The screenshot shows a 'Request CPL' form with various dropdown menus and a 'Request CPL' button. Below the form is a table with the following data:

	Description	Reference	Status	Date Downloaded	Date Voided	
Jacket Loan	110243182	1-1THW6M	Issued	4/7/2017 8:58:00 AM		X
Jacket Loan	110242932	1-1THVZ0	Issued	4/7/2017 8:53:00 AM		X
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)

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

The 'Void Item' dropdown menu is open, showing the following options:

- Cancelled Due to Revision (Selected)
- Cancelled Due to Revision
- Entered in Error
- Jacket Data or Type Changed
- Jacket Not Issued
- Other
- Transaction Cancelled

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		X
Jacket Loan	110242932	1-1TMVZ0	Issued	4/7/2017 8:53:00 AM		X
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)

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