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.

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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.

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 each 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.

   ![Loan Information Screen](image)

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

   ![Property Information Screen](image)

   c. **Buyer/Borrower Names**

   ![Buyer/Borrower Names Screen](image)

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

   ![Mailing Address](image)

   e. **Seller’s Information, if purchase transaction.**

   ![Seller Information Screen](image)

   a. Add seller’s mailing address. The mailing address is a required field, if a purchase transaction.

   ![Mailing Address](image)
2. Hover over the **To Do** tab, select **Underwriter Services**, then select **Underwriter Online Services**.

![Underwriter Online Services](image)

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

Requesting Lender’s Policy Jacket

1. Select the **Jacket** tab.

![Jacket Tab](image)

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

![Select Loan](image)

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

   **Agencies:** **AccuTitle Test Company**

4. 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**

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.

   **Policy Date:**

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 successor language from the available list.

   **Lender:** **AAA Lender Company**

   **Successor Language:** **Its Successors And/Or Assigns**
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.
       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.


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 Tab](image)

a. Provide the File Number or the Original Policy Number.

b. Select **Find**.

![Find Original Policy](image)

c. Select the applicable Policy Number.

![Select Policy Number](image)

d. Or manually provide the Original Jacket Details.

![Manually Provide Details](image)

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

![Jacket Pricing Tab](image)

25. Select **Edit**.

26. Select the Policy Trans code from dropdown list.

![Select Policy Trans Code](image)

27. Provide the Premium for the Policy Jacket selected.

![Provide Premium](image)
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, **always** add the Lender’s Policy prior to adding the Owner’s Policy.

   ![](image1.png)

   Jacket Type: **Owners**

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

   ![](image2.png)

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

   ![](image3.png)

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.

   ![](image4.png)

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.

![Image of Add or Modify Line Item]

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

![Image of Add or Modify Line Item]


![Image of Add or Modify Line Item]

**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**.

![Image of Endorsements Original Jacket]

c. Select the applicable Policy Number.

![Image of Endorsements Original Jacket with 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.


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

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