



Stewart Access: Post Policy Endorsements

Quick Reference Card

Post Policy Endorsements Created in Stewart Access

Use the following steps to issue additional Endorsements after a Policy has been issued in Stewart Access.

Steps

1. Select **Post Policy Endorsement** from the *Stewart Access* menu.



2. Enter the **Original Jacket File Number** and click **Search**.

3. Select the **Policy** to which the **Endorsement** is being created. Click **Save**. The **Endorsement** tab will be revealed.

4. Click **Add** on the **Endorsement** tab. Select the needed endorsement from the picklist. Enter the **Actual Premium** and **Actual Remittance**, if needed. Scroll to the right to enter a **Transaction Code** (required). Click **Update**.



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- To edit the endorsement information before issuing, click **Edit**  then make any changes.
- To delete this endorsement before issuing, click **Delete** .
- To issue the endorsement, click **Issue** .

Endorsement 1		Property 1			
Date	Location	Endorsement	Liability	Actual Premium	Actual Remittance
3/17/2016	1980 Post Oak	ALTA 8.1-06 Environmenta...		\$150.00	\$0

- Once issued, a unique Serial Number is generated by *Stewart Access* for the endorsement.

Endorsement 1		Property 1					
Actual Premium	Actual Remittance	Trans Code	Calculated Remittance	Status	Issue Date	Cancel Date	Serial Number
\$150.00	\$0	500	\$0	Issued	3/17/2016		190105428

- To delete an Issued endorsement click **Cancel** . The endorsement is removed and marked as **Cancelled** for **Policy Register** purposes.

Note: This exercise will only create an entry in the **Policy Register**. You must print the actual endorsement from your production software.

Post Policy Endorsements to Policies NOT Created in Stewart Access

Use the following steps to issue additional Endorsements to a Policy NOT issued in Stewart Access.

Steps

- Select **Post Policy Endorsement** from the *Stewart Access* menu.



- Enter the **Original File Number** and click **Search** .

Original Jacket

File Number Agency

- Complete the highlighted fields and click **Save** .

Original Jacket

File Number Agency

OPN State Liability \$

Original Policy Date Form Type Underwriter



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4. Add the Property Address by clicking **Add** . Enter the **Property** address or **Lot, Block, Subdivision** or **Metes and Bounds** fields. Click **Save** . Click **Save** again. The Endorsement tab will be revealed.

5. Click **Add** on the **Endorsement** tab. Select the needed endorsement from the picklist. Enter the **Actual Premium** and **Actual Remittance**, if needed. Scroll to the right to enter a **Transaction Code** (required). Click **Update** .

6. To edit the endorsement information before issuing, click **Edit** then make any changes.
7. To delete this endorsement before issuing, click **Delete** .
8. To issue the endorsement, click **Issue** .

Date	Location	Endorsement	Liability	Actual Premium	Actual Remittance
3/17/2016	1980 Post Oak	ALTA 8.1-06 Environmenta...		\$150.00	\$0

9. Once issued, a unique Serial Number is generated by *Stewart Access* for the endorsement.

Actual Premium	Actual Remittance	Trans Code	Calculated Remittance	Status	Issue Date	Cancel Date	Serial Number
\$150.00	\$0	500	\$0	Issued	3/17/2016		190105428

10. To delete an Issued endorsement click **Cancel** . The endorsement is removed and marked as **Cancelled** for **Policy Register** purposes.

Note: This exercise will only create an entry in the **Policy Register**. You must print the actual endorsement from your production software.