



Stewart Access Portal

Version 1.6

Release Notes

December 15, 2015

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Stewart Access Portal 1.6 Release Notes

Stewart Access Portal 1.6 includes additional functionality, enhancements, and defect corrections. This document provides users with a brief explanation of what was fixed and an introduction to new features and functionality implemented with this release.

Deployment Date: December 15, 2015

New in This Release

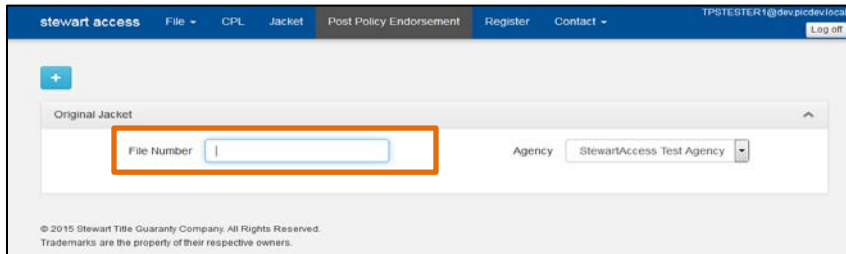
An overview of new features and modifications to Stewart Access Portal 1.6 include:

- A new feature has been added to allow users to add and manage [Post Policy Endorsements](#). Use this feature to add an endorsement to a policy that has already been created either within Stewart Access (a standalone endorsement) or outside of Stewart Access (an orphaned endorsement).
- The new [Transmittal Register](#) feature gives agencies the ability to receive a consolidated view of daily, weekly, or monthly charges for Policy, CPL, and/or Endorsements.

Post Policy Endorsements

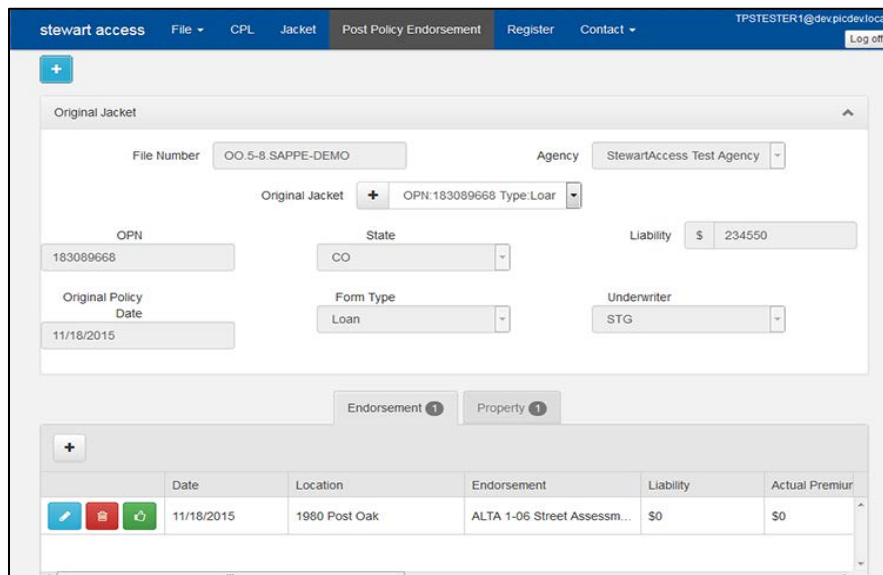
The **Post Policy Endorsements** feature allows users to add endorsements for existing Stewart Access Policy Jackets (Standalone Endorsements) and non-Stewart Access Jackets (Orphaned Endorsements).

From the *Post Policy Endorsement* screen, enter the **File Number** and press enter to open the Original Jacket.



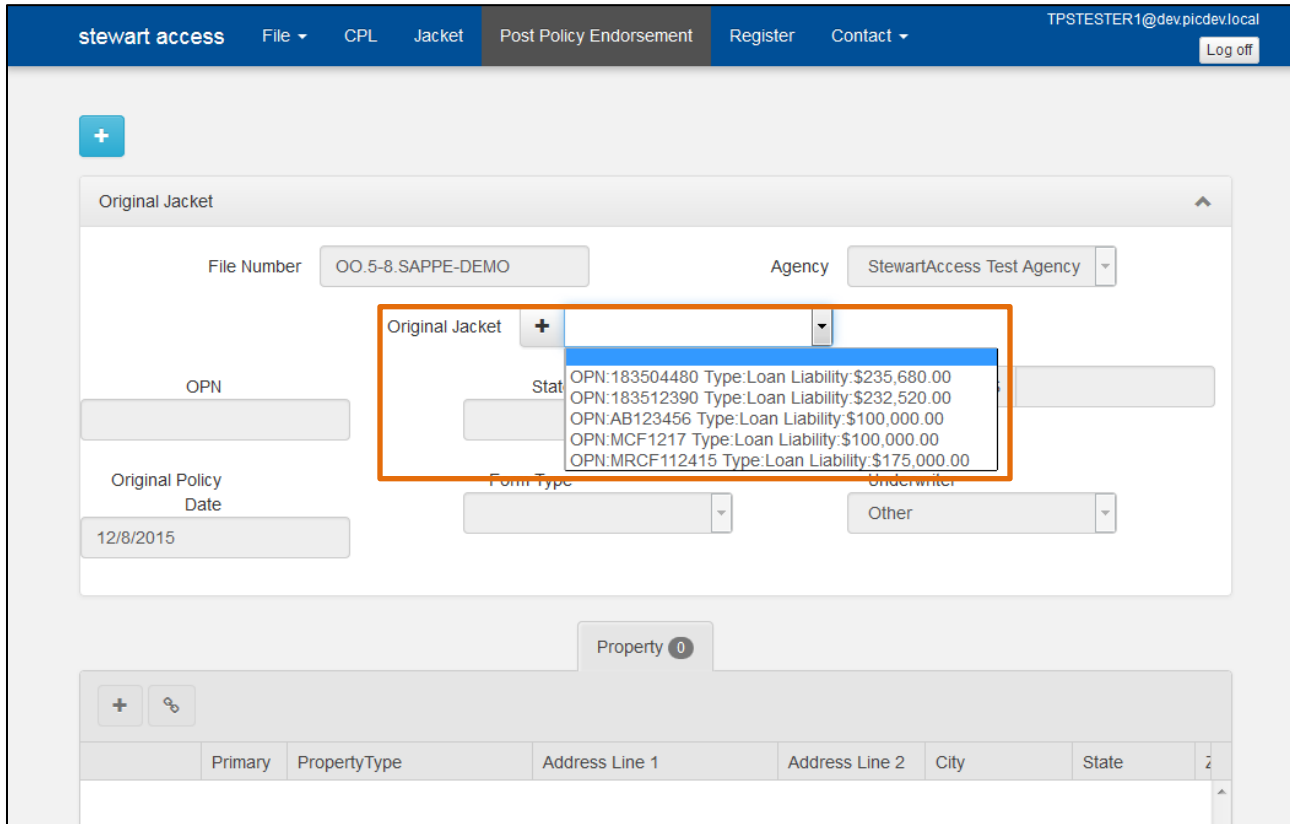
The **Original Jacket** section shows the following fields and tabs:

- **File Number:** The file number associated with the Post Policy Endorsement
- **Agency:** The name of the issuing agency
- **Original Jacket:** Drop-down displays Jackets associated with the File. If Jacket does not exist in Stewart Access, one can be added by clicking the + button.
- **OPN:** Original Policy Number
- **Save:** Button will be visible when working with an original jacket for the first time (not shown below)
- **State:** The state for which the Jacket is generated
- **Liability:** The liability covered in the Jacket
- **Original Policy Date:** The effective date for the policy
- **Form Type:** The form type used for the Jacket
- **Underwriter:** Options are STG or Other
 - **STG:** The original jacket is with Stewart in any system, e.g. Stewart Access, STEPS, etc
 - **Other:** The original jacket was not issued with Stewart
- **Endorsement:** Manage endorsements
- **Property:** Shows the property address associated with the original jacket



Managing Post Policy Endorsements

When adding or managing Post Policy Endorsements, first determine whether a jacket exists for the file number in Stewart Access. In the **Original Jacket** field, click the drop-down to view the Original Jackets associated with the file number.



- If the **Original Jacket** exists in **Stewart Access**, follow the steps to [Add Post Policy Endorsement to Existing Stewart Access Jacket](#).
- If the **Original Jacket** does not exist in **Stewart Access**, follow the steps to [Add Post Policy Endorsement to a non-Stewart Access Jacket](#).

Add Post Policy Endorsement to Existing Stewart Access Jacket

Follow the steps below to enter a Post Policy Endorsement for a Jacket that was originally created in Stewart Access, otherwise known as a Standalone Endorsement:

Steps

1. From the *Stewart Access* menu, select **Post Policy Endorsement**.



2. Enter the **File Number** and press enter on the keyboard.

The screenshot shows the Stewart Access Portal interface. The top navigation bar includes 'stewart access', 'File', 'CPL', 'Jacket', 'Post Policy Endorsement', 'Register', and 'Contact'. The user is logged in as 'TPSTESTER1@dev.picdev.local'. The main form area is titled 'Original Jacket' and contains a 'File Number' field with the value 'OO.5-8.SAPPE-DEMO' and an 'Agency' dropdown menu set to 'StewartAccess Test Agency'. The 'File Number' field is highlighted with an orange border. Below the form, there is a copyright notice: '© 2015 Stewart Title Guaranty Company. All Rights Reserved. Trademarks are the property of their respective owners.'

3. In the **Original Jacket** drop-down list, select the **Jacket**.

The screenshot shows the Stewart Access Portal interface with the 'Original Jacket' dropdown menu open. The 'File Number' field still contains 'OO.5-8.SAPPE-DEMO' and the 'Agency' dropdown is 'StewartAccess Test Agency'. The 'Original Jacket' dropdown menu is highlighted with an orange border and displays a list of options:

- OPN:183089668 Type:Loan Liability:\$234,550.00
- OPN:183504480 Type:Loan Liability:\$235,680.00
- OPN:183512390 Type:Loan Liability:\$232,520.00
- OPN:AB123456 Type:Loan Liability:\$100,000.00
- OPN:MCF1217 Type:Loan Liability:\$100,000.00

Below the dropdown menu, there is a table with columns: Primary, PropertyType, Address Line 1, Address Line 2, City, State, and a column with the number '2'. The table is currently empty.

- The Underwriter is listed as STG, confirming that the jacket originated with Stewart Access. On the **Endorsement** tab, click the **+** button to **Add Endorsement**.

stewart access File CPL Jacket Post Policy Endorsement Register Contact TPSTESTER1@dev.picdev.local Log off

File Number: OO.5-8.SAPPE-DEMO Agency: StewartAccess Test Agency

Original Jacket: + OPN:183089668 Type:Loar

OPN: 183089668 State: CO Liability: \$ 234550

Original Policy Date: 11/18/2015 Form Type: Loan Underwriter: STG

Endorsement 0 Property 1

+ Add Endorsement

Date	Location	Endorsement	Liability	Actual Premium

- Enter all the information for the endorsement including the **Date, Location, Endorsement, Liability, Actual Premium, Actual Remittance, and Trans Code**.

Date	Location	Endorsement	Liability	Actual Premium	Actual Remittance	Trans Code	Calculated Remittance	Status	Issue Date	Cancel Date	Serial Number
11/23/2015	1980 Post Oak Suit...							Draft			

- Click **Save**.

Endorsement 0 Property 1

+ Add Endorsement

Date	Location	Endorsement	Liability	Actual Premium
11/23/2015	1980 Post Oak Suit...	CO 100.30 Develop...	\$10,000.00	\$1,000.00

- The Endorsement will be saved in **Draft** status until it is issued.

Date	Location	Endorsement	Liability	Actual Premium	Actual Premium	Actual Remittance	Trans Code	Calculated Remittance	Status	Issue Date	Cancel Date	Serial Number
11/23/2015	1980 Post Oak	CO 100.30 Development o	\$10,000.00	\$1,000.00	\$1,000.00	\$500.00	500	\$0	Draft			300002387



For more information on adding Post Policy Endorsements, refer to the Stewart Access Online Help and search for the section labeled, *Post Policy Endorsements*.

Add Post Policy Endorsement to a non-Stewart Access Jacket

Follow the steps below to enter a Post Policy Endorsement for a Jacket that was *not* originally created in Stewart Access, otherwise known as an Orphaned Endorsement:

Steps

- From the *Stewart Access* menu, select **Post Policy Endorsement**.



- Enter the **File Number** and press enter on the keyboard.

Original Jacket

File Number: OO.5-8.SAPPE-DEMO

Agency: StewartAccess Test Agency

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3. In the **Original Jacket** drop-down list, click the **+** button.

The screenshot shows the Stewart Access Portal interface. At the top, there is a navigation bar with 'stewart access' and several menu items: 'File', 'CPL', 'Jacket', 'Post Policy Endorsement', 'Register', and 'Contact'. The user is logged in as 'TPSTESTER1@dev.picdev.local'. Below the navigation bar, there is a '+ button' and a section titled 'Original Jacket'. In this section, the 'File Number' is 'OO.5-8.SAPPE-DEMO' and the 'Agency' is 'StewartAccess Test Agency'. The 'Original Jacket' drop-down menu is highlighted with a red box, and a '+' button is visible next to it. Below this section, there is a 'Property 0' section with a table for adding properties. The table has columns for 'Primary', 'PropertyType', 'Address Line 1', 'Address Line 2', 'City', and 'State'. At the bottom, there is a copyright notice: '© 2015 Stewart Title Guaranty Company. All Rights Reserved. Trademarks are the property of their respective owners.'

4. Enter the **OPN**, choose the **State** from the drop-down list, enter the **Liability** amount, enter or select the **Original Policy Date**, select the **Form Type** from the drop-down list, and in the **Underwriter** drop-down, select either **STG** for a Stewart Jacket or **Other** for a non-Stewart Jacket.

The screenshot shows the Stewart Access Portal interface, similar to the previous one. The 'Original Jacket' section is highlighted with a red box. In this section, the 'File Number' is 'OO.5-8.SAPPE-DEMO' and the 'Agency' is 'StewartAccess Test Agency'. The 'Original Jacket' drop-down menu is highlighted with a red box, and a '+' button is visible next to it. Below this section, there is a 'Property 0' section with a table for adding properties. The table has columns for 'Primary', 'PropertyType', 'Address Line 1', 'Address Line 2', 'City', and 'State'. At the bottom, there is a copyright notice: '© 2015 Stewart Title Guaranty Company. All Rights Reserved. Trademarks are the property of their respective owners.'

5. Click **Save**.

The screenshot shows the 'Original Jacket' form in the Stewart Access Portal. The form includes the following fields: File Number (OO.5-8.SAPPE-DEMO), Agency (StewartAccess Test Agency), Original Jacket (+), OPN (MRCF112415), State (TX), Liability (\$ 175000), Original Policy Date (11/24/2015), Form Type (Loan), and Underwriter (Other). A green 'Save' button is highlighted with a red box.

6. On the **Property** tab, click the + button to add the Property details.

The screenshot shows the 'Property' tab in the Stewart Access Portal. The 'Original Jacket' form is visible at the top. Below it, the 'Property' tab is active, showing a table with columns: Primary, PropertyType, Address Line 1, Address Line 2, City, State, and a column with the number 2. A red box highlights the '+' button in the top left corner of the Property section.

7. Enter the property details in the **Add Property** pop-up box and click **Save**.

The screenshot shows the 'Add Property' pop-up form. The 'Save' button is highlighted with an orange box. The form contains the following fields and values:

Field	Value
File Number	OO.5-8.SAPPE-DEMO
Agency	StewartAccess Test Agency Inc
Property Type	Single Family Dwell
Address Line 1	1347 Mardi Ln
Address Line 2	
County	Fort Bend
City	Richmond
State	TX
ZIP	77480
Country	USA
Lot	
Block	B
Section	
Subdivision	
PIN	
Metes And Bounds	

8. Click **Save** to save the Jacket.

The screenshot shows the main interface of the Stewart Access Portal. The 'Original Jacket' form is visible, and the 'Save' button is highlighted with an orange box. The form contains the following fields and values:

Field	Value
File Number	OO.5-8.SAPPE-DEMO
Agency	StewartAccess Test Agency
Original Jacket	
State	TX
Liability	\$ 175000
Original Policy Date	11/24/2015
Form Type	Loan
Underwriter	Other

Below the form, a table displays the property details:

Primary	PropertyType	Address Line 1	Address Line 2	City	State	2
<input checked="" type="checkbox"/>	Single Family Dwelling	1347 Mardi Ln		Richmond	TX	

9. On the **Endorsement** tab, click the **+** button to **Add Endorsement**.

10. Enter all the information for the endorsement including the **Date, Location, Endorsement, Liability, Actual Premium, Actual Remittance, and Trans Code**.

Date	Location	Endorsement	Liability	Actual Premium	Actual Remittance	Trans Code	Calculated Remittance	Status	Issue Date	Cancel Date	Serial Number
11/24/2015	1980 Post Oak Suit...	T-19.2 Minerals and...	\$10,000.00	\$10,000.00	\$500.00	0151 (Su...)		Draft			

11. Click **Save**.

Date	Location	Endorsement	Liability	Actual Premium
11/24/2015	1980 Post Oak Suit...	T-19.2 Minerals and...	\$10,000.00	\$10,000.00

12. The Endorsement will be saved in **Draft** status until it is issued.



	Date	Location	Endorsement	Liability	Actual Premium	Actual Remittance	Trans Code	Calculated Remittance	Status	Issue Date	Cancel Date	Serial Number
	11/24/2015	1980 Post Oak	T-19.2 Minerals and Surfa...	\$10,000.00	\$10,000.00	\$500.00	0151	\$0	Draft			XXXX06927



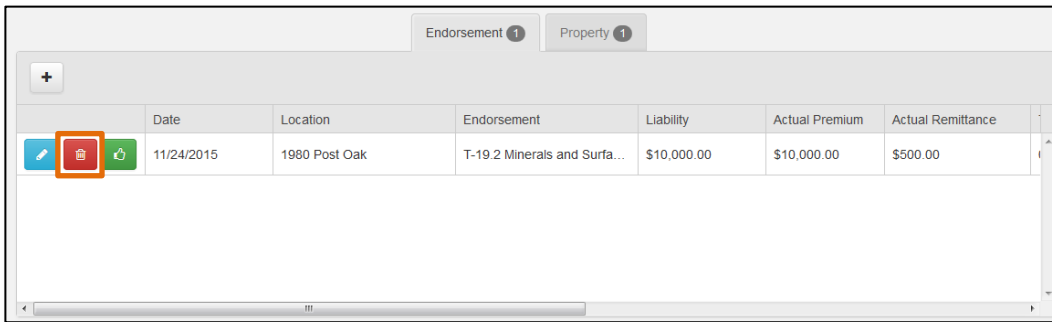
For more information on adding Post Policy Endorsements, refer to the Stewart Access Online Help and search for the section labeled, *Post Policy Endorsements*.

Delete a Post Policy Endorsement

Follow the steps below to **Delete** a Post Policy Endorsement:

Steps

1. On the Endorsements tab, click the **Delete** button.



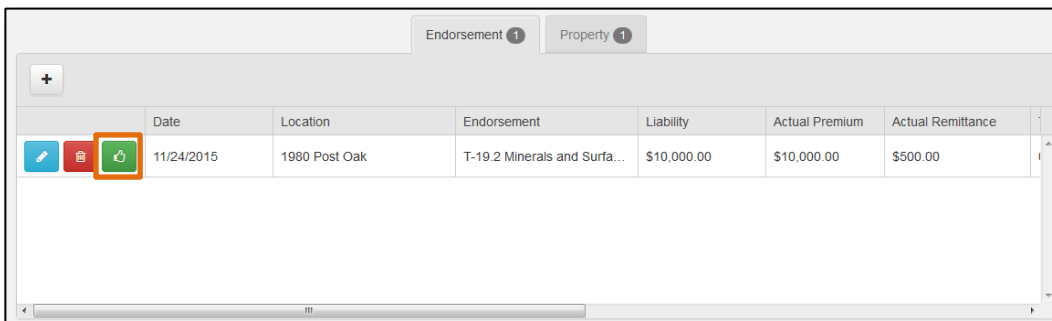
	Date	Location	Endorsement	Liability	Actual Premium	Actual Remittance
	11/24/2015	1980 Post Oak	T-19.2 Minerals and Surfa...	\$10,000.00	\$10,000.00	\$500.00

Issue a Post Policy Endorsement

Follow the steps below to **Issue** a Post Policy Endorsement:

Steps

1. On the Endorsements tab, click the **Issue** button.



	Date	Location	Endorsement	Liability	Actual Premium	Actual Remittance
	11/24/2015	1980 Post Oak	T-19.2 Minerals and Surfa...	\$10,000.00	\$10,000.00	\$500.00

- The Endorsement **Status** will reflect **Issued** and the **Serial Number** is unmasked. The **Cancel** button appears in the place of the **Edit**, **Delete** and **Issue** buttons.

	Date	Location	Endorsement	Liability	Actual Premium	Actual Remittance	Trans Code	Calculated Remittance	Status	Issue Date	Cancel Date	Serial Number
✖	11/24/2015	1980 Post Oak	T-19.2 Minerals and Surfa...	\$10,000.00	\$10,000.00	\$500.00	0151	\$0	Issued	11/24/2015		183716927

Cancel a Post Policy Endorsement

Follow the steps below to **Cancel** a Post Policy Endorsement:

Steps

- On the Endorsements tab, click the **Cancel** button.
- The Endorsement **Status** will show **Cancelled** and a second line below the original endorsement will appear with the totals reflected with negative amounts to cancel out the transaction. The **Edit** and **Delete** buttons reappear but are greyed out.

	Date	Location	Endorsement	Liability	Actual Premium	Actual Remittance	Trans Code	Calculated Remittance	Status	Issue Date	Cancel Date	Serial Number
✖	11/24/2015	1980 Post Oak	T-19.2 Minerals and Surfa...	\$10,000.00	\$10,000.00	\$500.00	0151	\$0	Cancelled	11/24/2015	11/24/2015	183716927
✖	11/24/2015	1980 Post Oak	T-19.2 Minerals and Surfa...	\$10,000.00	\$-10,000.00	\$-500.00	0151	\$0	Cancelled	11/24/2015	11/24/2015	183716927



For more information on Deleting, Issuing and Cancelling Post Policy Endorsements, refer to the Stewart Access Online Help and search for the section labeled, *Post Policy Endorsements*.

Transmittal Register

Agencies may want a consolidated view of daily, weekly, or monthly charges for Policy, CPL, and/or Endorsements. The Register screen gives agencies the ability to enter search criteria and generate **Transmittal Registers**. All issued and cancelled products for the month display on the **Transmittal Register**.

Use the following fields to complete the Transmittal Register criteria:

- **Agency:** The Agency on file populates this drop-down field by default
- **Location:** Use this drop-down field to select the Agency location or select **All** for all locations
- **File Number (optional):** Enter the file number
- **From/To:** These fields populate with the previous month's dates and can be edited to select another date range. The maximum date range to enter is two months ahead of the previous month's dates.

This report also displays Agency information, Total amounts issued for the Agency as well as additional charges and other information. All Policies, CPLs, Endorsements and Special charges either issued or cancelled within the selected date parameters are also included in the Transmittal Register.

Total amounts for Agency in this register include Policy Premium, Underwriter Remittance, amount Paid, and Additional Information such as a check number or wire number.

Total Issued for Agency:	Premium	Underwriter Remittance	Pay Amt	Pay Amount	Agst Info (Check/Wire #)
	0.00	0.00			

Additional Charges or Information: _____

Agency Information:
 StewartAccess Test Agency Inc
 1800 First St. Suite 800
 Houston, TX 77058
 (281) 222-2222

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This report includes the latest report display of Policies, CPLs, Endorsements and Special charges either issued or cancelled within the selected date parameters.
 Page 1 of 1
 Date of Report: 10/1/2015
 Title of Report: (CPL) Register: TPSTESTER1

Generate a Transmittal Register

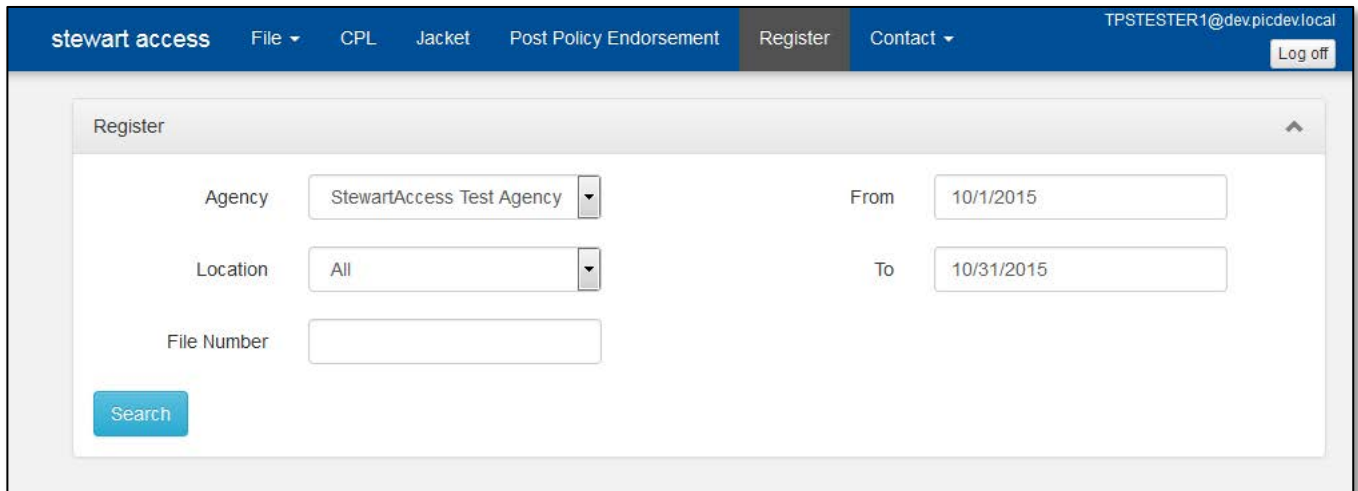
Follow the steps below to generate a consolidated view of daily, weekly, or monthly charges for Policy, CPL, and/or Endorsements.

Steps

1. From the *Stewart Access* menu, select **Register**.



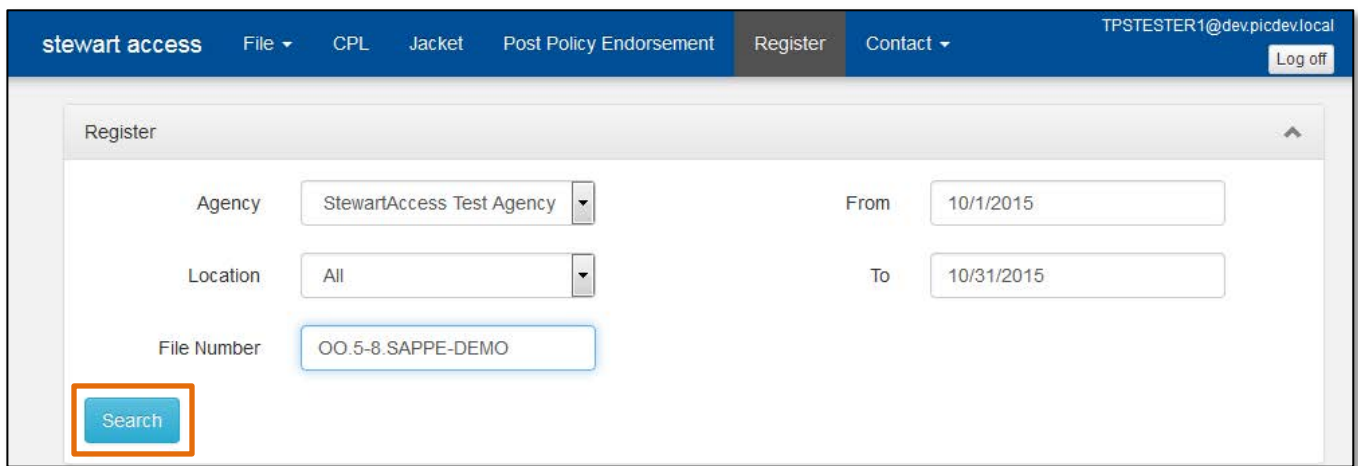
2. From the *Register* screen, select the report criteria, such as Agency, Location, and the From and To dates.



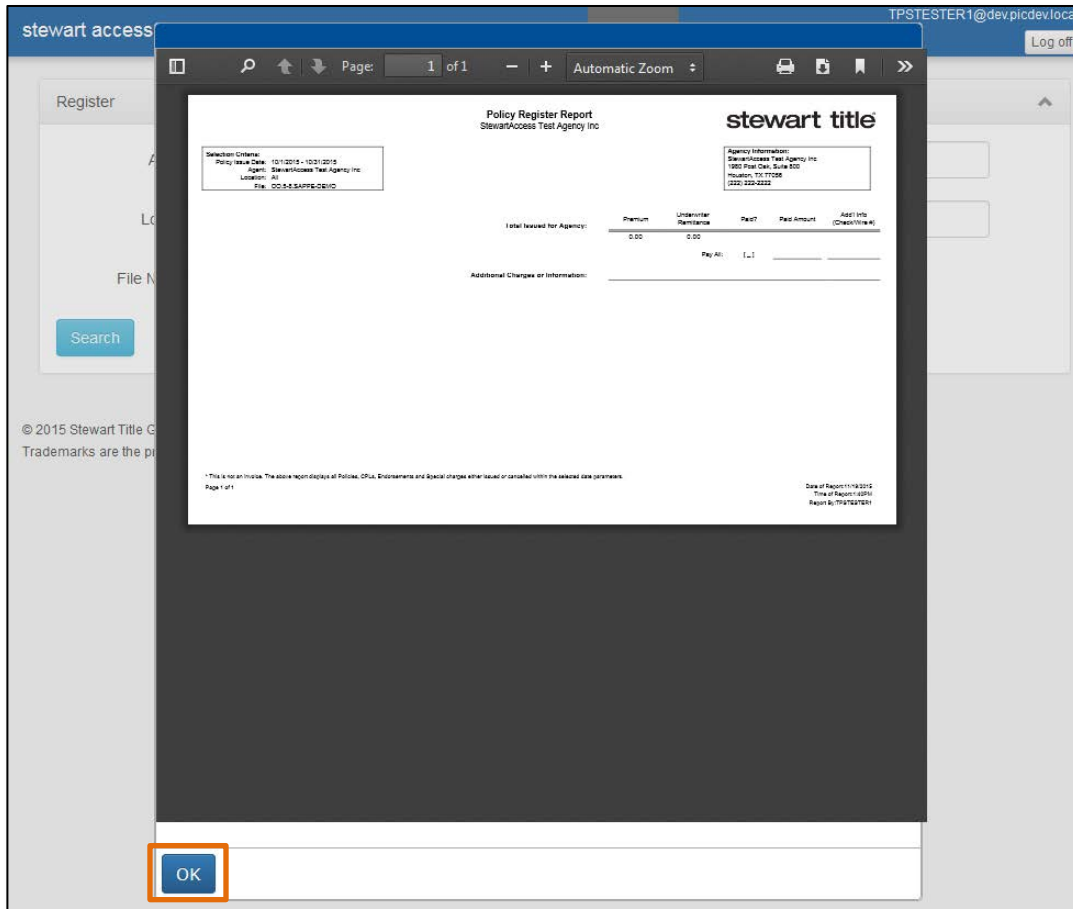
3. (Optional) Enter the **File Number**.



4. Click **Search**.



- Depending on the internet browser used, the report will either pop-up or prompt to download. The Transmittal Register displays in PDF format. Click **OK** to close the report.



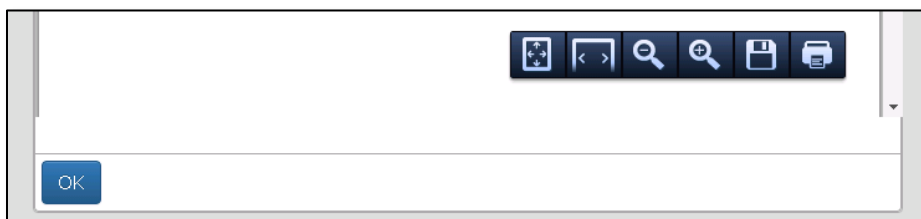
Save, Email, Print & Zoom a Transmittal Register

Use the **Actions** buttons on the bottom of the **Transmittal Register** screen to save, email, print, enlarge or minimize a generated Transmittal Register. Click the button that best describes the action requested. Click **OK** when finished.



Note

The display of these options is dependent on browser capability.



For more information on viewing and/or generating a Transmittal Register, refer to the Stewart Access Online Help and search for the section labeled, *Transmittal Register*.

Defects

The following defects were address in Stewart Access 1.6.

- When cancelling a **Jacket**, the **Liability Amount** shows as a negative value.
- The **Lender** tab on both the *CPL* and *Jacket* screens default with the Lender search details when a Lender is found for the given details.
- On the **Charges** grid of the *File Products* screen, the serial number of the **Issued** and **Cancelled Post Policy Endorsements** is unmasked.
- The date no longer automatically changes to the next day when saving a **Post Policy Endorsement**.
- **Liability Amount** field on *Post Policy Endorsement* screen displays separators.
- **Trans Code** no longer defaults for base line item on **Jacket Pricing**.

Additional Information

Training

More information about Stewart Access functionality is available in the Stewart Access Online Help. For additional training and documentation including Quick Reference Cards, please contact the Stewart Customer Care Center.

Technical Support

For technical support, contact the Stewart Customer Care Center at 1.877.800.3132 or CustomerCare@stewart.com.