Stewart Access Portal

Release Notes

April 1, 2016

Version 1.6.1

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Stewart Access Portal 1.6.1 Release Notes

Stewart Access Portal 1.6.1 includes additional functionality and enhancements. This document provides users with an introduction to new features and functionality implemented with this release.

Deployment Date: April 1, 2016

New in This Release

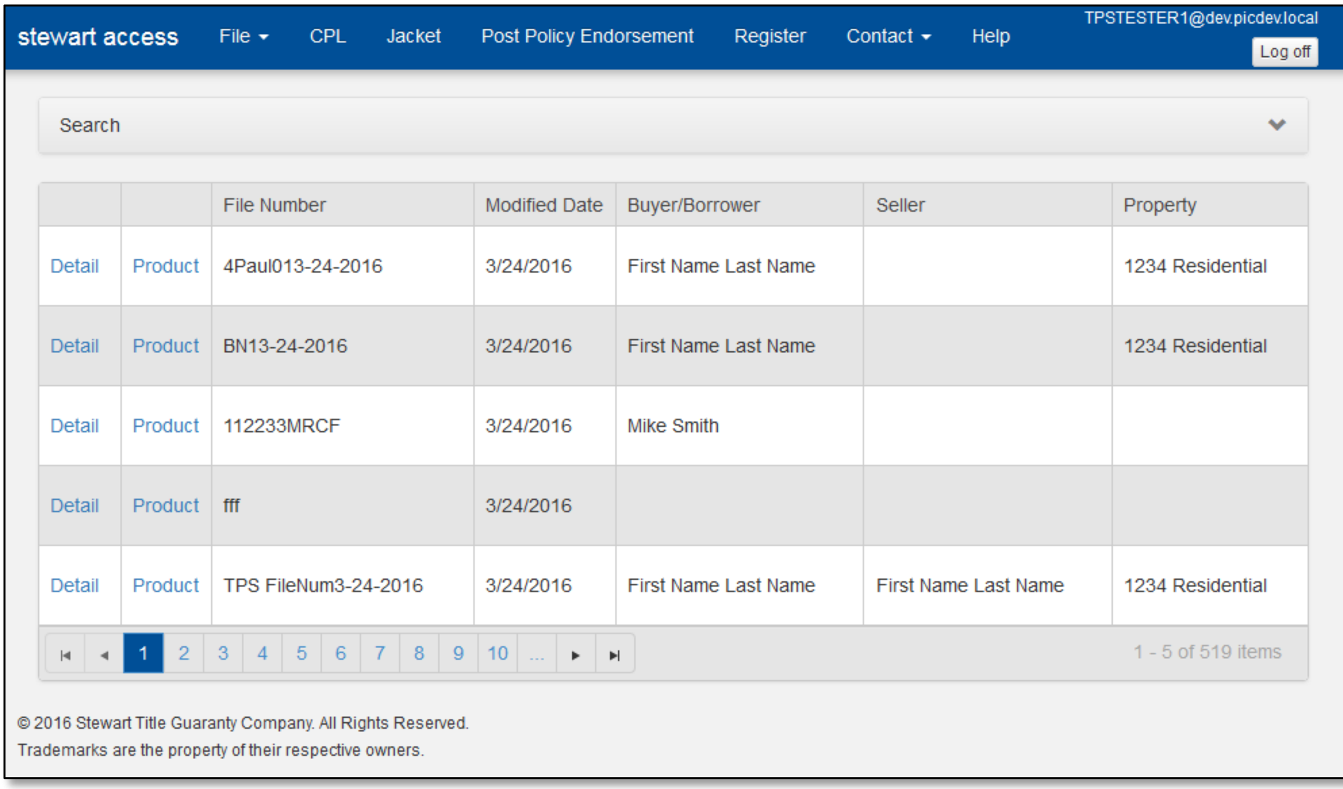
An overview of new features and modifications to Stewart Access Portal 1.6.1 include:

- A new Splash page has been added to Stewart Access.
- Online Help has been added to the Stewart Access application with a link at the top of the screen in the navigation bar.
- The ability to add, associate, or edit a buyer/borrower to a CPL has been added.
- A requirement to include either a first name and last name combination or a business name on the Buyer/Borrower tab in CPL has been added.
- Up to two lenders can be added or associated to a CPL from the Lender tab.
- The Attention To field has been extended to accommodate up to fifty characters.

Portal Splash Page Login

Upon logging in to *Stewart Access*, the user will be taken to a new **Splash** page, giving easy access to **File Search**. The **Splash** page shows a list of the most recently modified files.

Additionally, the user can navigate to this **Splash** page at any time by clicking the **Stewart Access** logo on the top bar of the application.



Online Help Added to Menu

Stewart Access Online Help has been integrated to Stewart Access. This Help system contains detailed information about how to perform specific tasks in Stewart Access.

To access the Stewart Access Online Help:

1. Click **Help** on the top navigation bar.

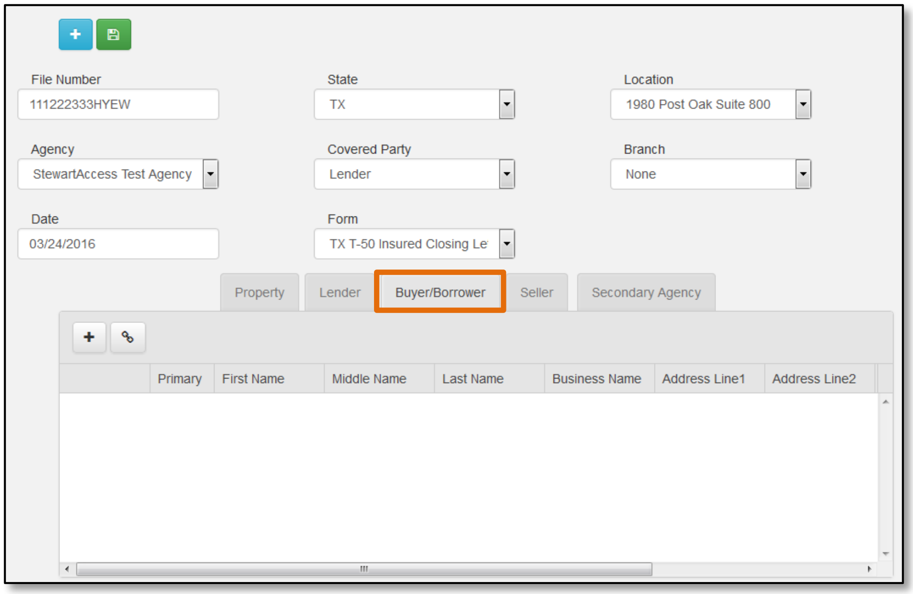
2. The *Stewart Access Online Help* launches in a new browser window/tab.

Add / Associate a Buyer / Borrower in CPL

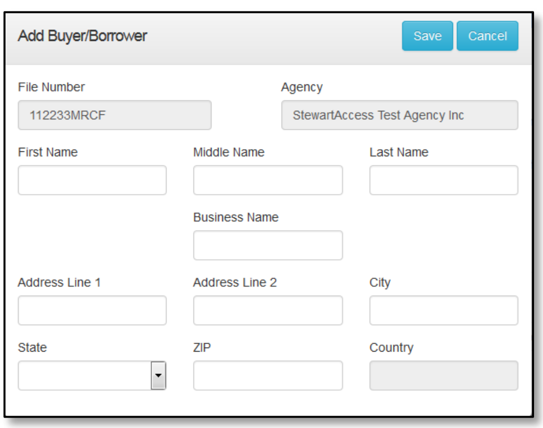
The user has the option to add or associate one or more buyer/borrowers for a CPL on the Buyer/Borrower tab. Follow the steps below to **Add a Buyer/Borrower**:

Steps

1. Create or open a **CPL**.
2. Select the *Buyer/Borrower* tab.



3. Click  to add a new **Buyer/Borrower**.
   - Enter the **First Name** and **Last Name** or the **Business Name**. (Optional when **First Name** and **Last Name** are provided, added **Middle Name**.)
   - **Provide Address Line 1** and (optional) **Address Line 2**.
   - Enter the **City**.
   - Provide the **ZIP** code.
   - Select a state from the **State** drop-down.
   - By default, **USA** displays in the Country field and cannot be changed.

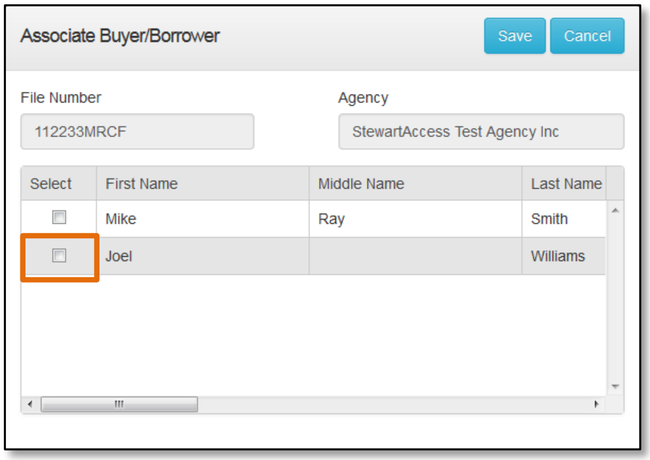


4. When finished, click **Save.** The new buyer/borrower record displays in the **Buyer/Borrower** tab.

Follow the steps below to **Associate a Buyer/Borrower**:

Steps

1. Create or open a **CPL**.
5. Select the *Buyer/Borrower* tab.
6. Click to associate an existing **Buyer/Borrower** from the file to the **CPL**.
7. Select one or more buyer/borrower records to associate to the **CPL**.

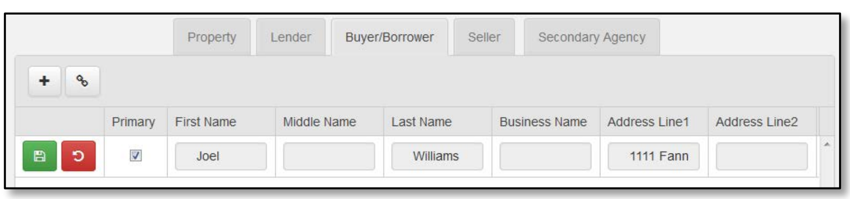


8. When finished, click **Save**. The selected buyer/borrower records display on the *Buyer/Borrower* tab.

If more than one buyer/borrower has been added, you can assign the **Primary** buyer/borrow by using the **Edit** function. To change the **Primary Buyer/Borrower**, follow the steps below to **Edit a Buyer/Borrower**:

Steps

1. Open the **CPL**.
2. Select the *Buyer/Borrower* tab.
3. Click to edit a buyer/borrower record associated to the CPL.
4. User can only edit the Primary Flag, click the checkbox in the **Primary** column for the appropriate **Buyer/Borrower** from the list.



5. (Optional) Click to cancel the edit of the buyer/borrower record. The un-edited buyer/borrower record displays in the Buyer/Borrower tab.
6. When finished click . The edited buyer/borrower record displays on the *Buyer/Borrower* tab.

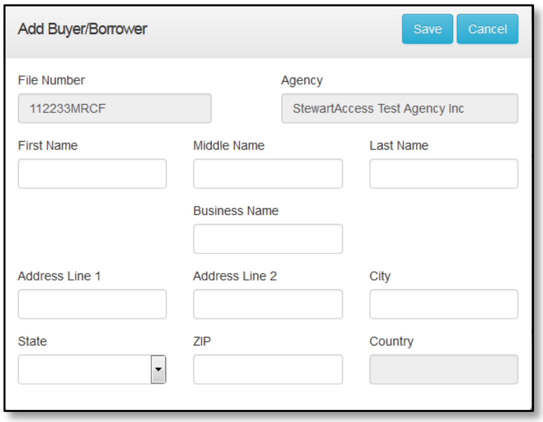
HELP

For more information on adding, associating or editing Buyer/Borrower information, refer to the Stewart Access Online Help and search for the section labeled, *CPL Module.*

Name Requirements for Buyers/Borrowers Tab in CPL

When adding buyer/borrower information to a CPL on the *Buyer/Borrower* tab, you ***must*** enter either the **First Name** and **Last Name** *or* **Business Name**. Address fields **should not** be partially entered. It is required to enter the following fields:

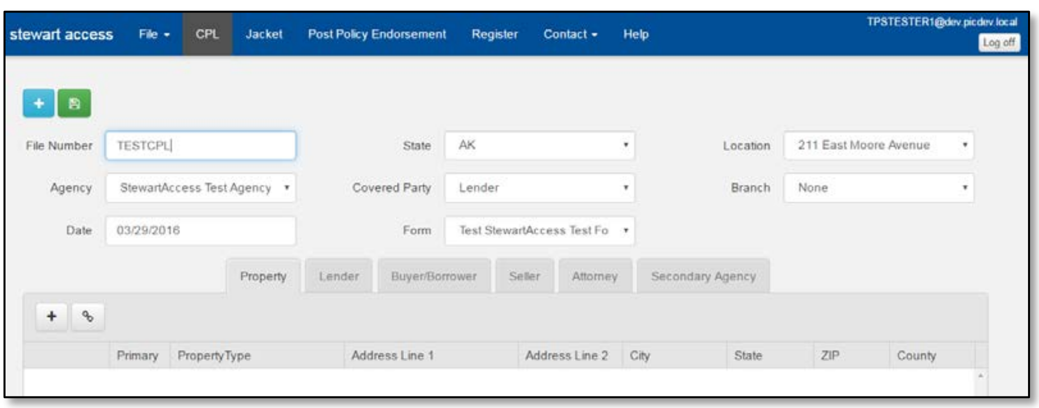
- Address Line 1 (Optional: Address Line 2)
- City
- State
- Zip
- Country (automatically defaults based upon entry in State field.)



Preview Requirements for Buyers/Borrowers on Lender CPL

When user select Save/Preview on Lender CPL (Covered Party Lender), following address fields are not required.

- Address Line 1
- Address Line 2
- City
- State
- Zip
- Country

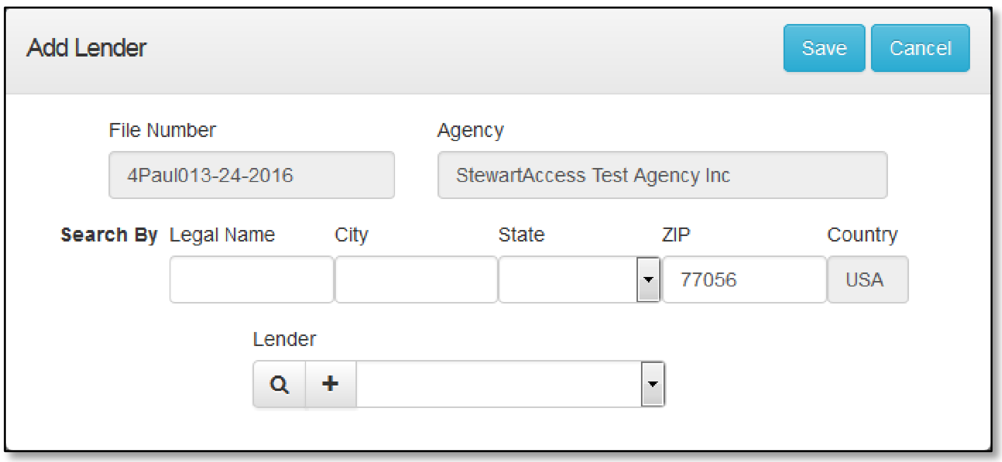


Search For Existing or Add a Prospective Lender to CPL

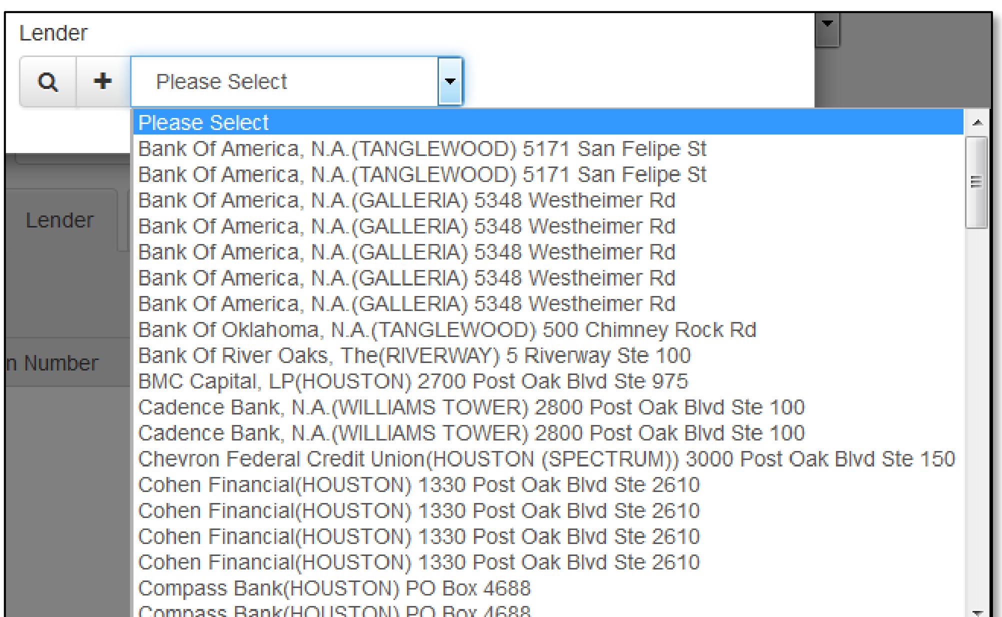
The user has the ability to search for an existing lender or add a prospective lender to a CPL on the *Lender* tab. Up to two lenders can be associated or added, one “primary” and one “secondary”. Once the CPL has been entered, the user can follow the steps below to **Search for a Lender**:

Steps

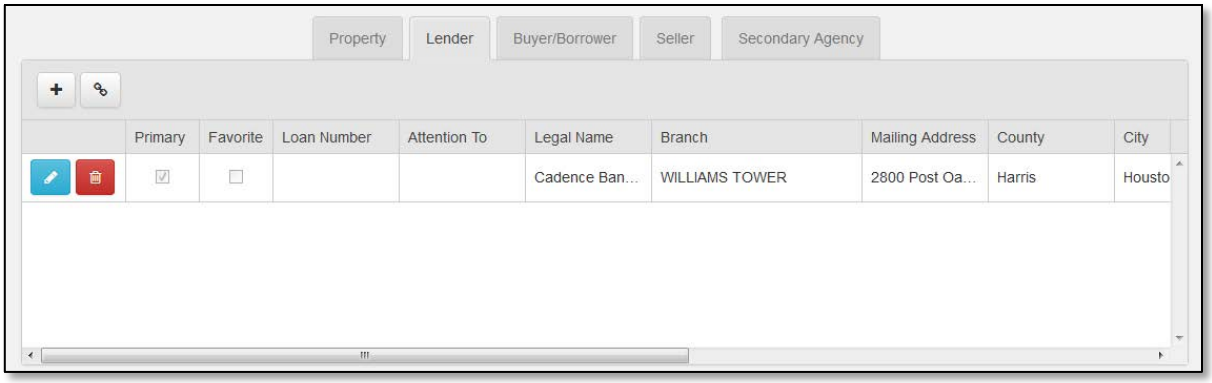
1. Create or open a **CPL**.
2. Select the *Lender* tab.
3. Click + to add a lender to the **CPL**.
4. In the set of **Search By** fields, USA displays in the **Country** field by default, and cannot be changed.



5. In the set of **Search By** fields, provide a ZIP code–or provide Legal Name, City and State– and click to search for a Stewart lender.
6. Select a lender from the **Lender** drop-down.



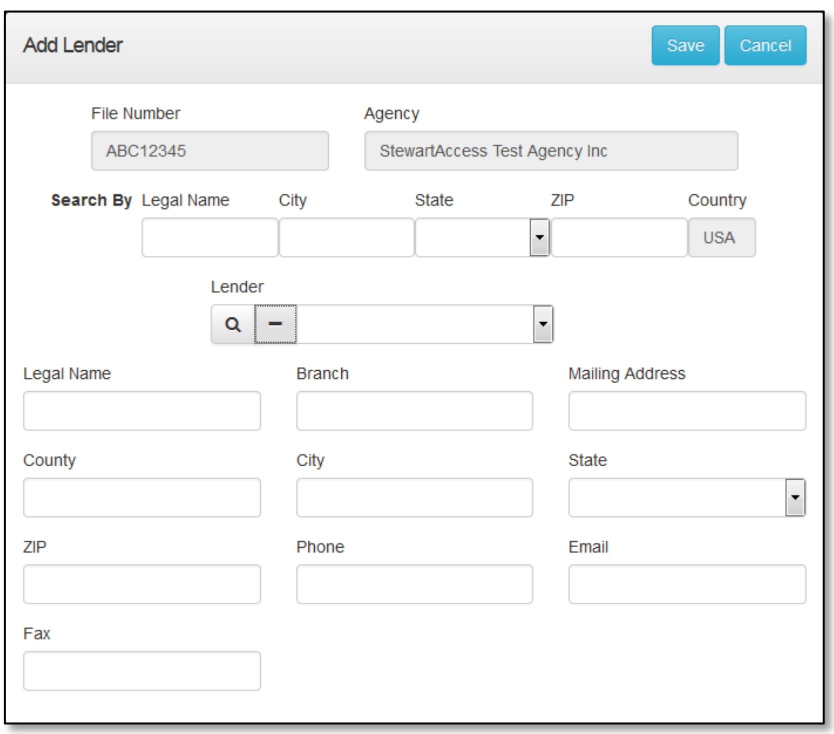
7. Click **Save**, the lender displays on the *Lender* tab.



Follow the steps below to **Add a Prospective Lender**:

Steps

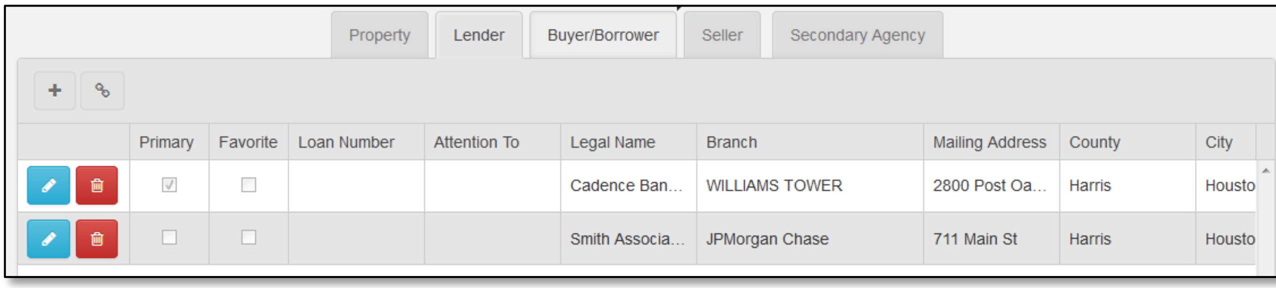
1. Create or open a **CPL**.
2. Select the *Lender* tab.
3. Click + to add a lender to the CPL. The **Add Lender** window opens.
4. Click + in the **Lender** field to provide a new lender. The **Add Lender** screen expands and lender fields are displayed.



- Provide the Legal Name.
- (Optional) Provide the Branch.
- Provide the Mailing Address.
- (Optional) Provide the County.

- Provide the City.
- Select a state from the State drop-down.
- Provide the ZIP code.
- (Optional) Provide the Phone.
- (Optional) Provide the Email.
- (Optional) Provide the Fax.

5. When finished, click **Save**. The prospect lender is displayed on the *Lender* tab.

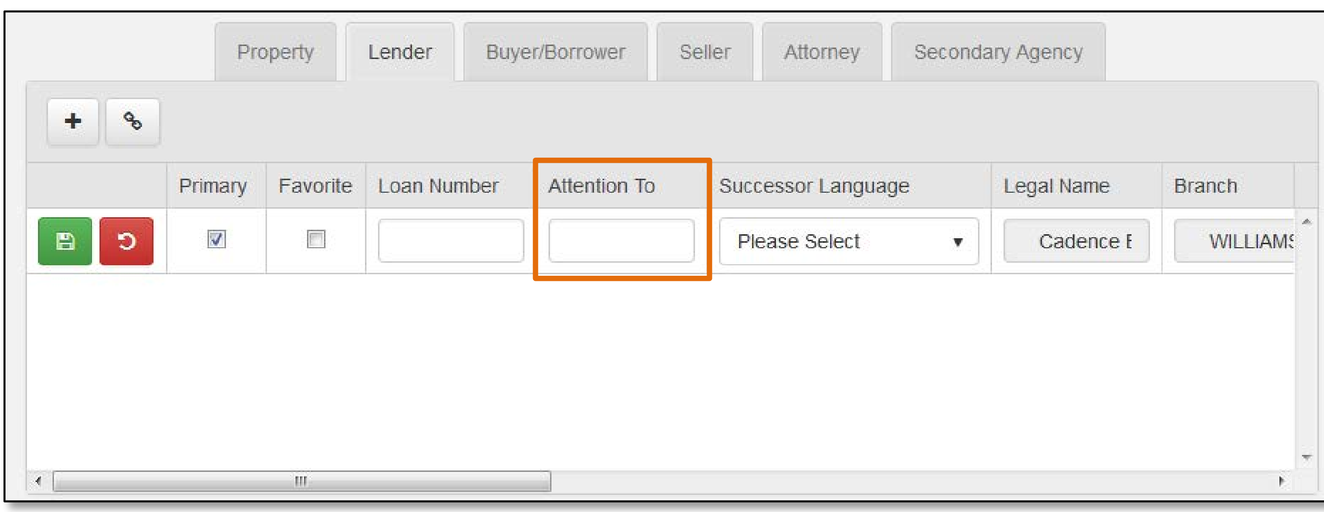


HELP

For more information the *Lender* tab, refer to the Stewart Access Online Help and search for the section labeled, *CPL Module.*

Extend Length for Attention to Field on CPL Lender Tab

The **Attention To** field on the *Lender* tab of **CPL** has been changed to allow for up to a maximum of 50 characters.



Defects

The following defects were address in Stewart Access 1.6.1.

- Previously, when a **Jacket** was created in *Stewart Access Porta*l and the property had an unauthorized county (for state of Texas); the **HOI flag checkbox** in *Stewart Access Core* was not checked. This issue has been resolved.
- Issue has been resolved in *Core File Management* where **Properties** and **Parties** (**Seller** and **Buyer**) data was not coming through for **CPL**s created using the external integration.
- Previously, when a user selected an **Original Policy Date** that was prior to or is after the current date, the date would automatically default to the user's system date on the **Jacket**, **Post Policy Endorsement Container**, and **Original Jacket** tab. This issue has been resolved.
- The **Location** field on the *Register* tab has been fixed to display all **Active** and **Inactive Agency** locations.

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.