

Stewart Access: Retrieving Policy Data from Closing

You can create **Policies** and **Endorsements** using the **Retrieve** icon in the **Policy** screen. Clicking **Retrieve** automatically populates **Policy** and **Endorsement** data based on the information entered in **Title Charges** and **Closing**.

Steps

1. Select the **Policy Form** to be issued.

2. With the file open, click **Policies** under **Data Entry Groups**.
3. Click the **Retrieve** button.
4. A message requiring confirmation appears. Click **Yes**. The policy related data entered in **Title Charges/Closing** displays including all policies and endorsements entered in the **Closing Module**.

5. Review the data on the **Policy** screen. You can add or edit information in the fields as required.
6. When finished, click **Save**. The policy is saved, and the policy number displays on the left side of the screen. Once you create the policy, the corresponding policy document set is automatically added to the order in the **Documents** section.

Note: Retrieve cannot be used to create Policies when there is at least one saved or incomplete policy record on the order. You cannot use Retrieve to flow endorsements from Title Charges or Closing without a parent policy.