

Encompass User Setup Form for Lenders

Complete this form to add a Lender Organization, Points of Contact, and employees who require access to the Stewart Title Company Plugin to Encompass. See Section 4 to remove Points of Contact or employees whom no longer require access the plugin.

Select the checkbox to indicate whether you are using this form to add or delete Lender users. If you are both adding and removing users, please select both checkboxes.

Add Users

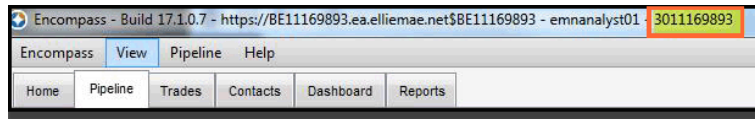
Delete Users

Section 1: Adding a New Lender/Bank

In the table below, enter the **Lender Name** and **Lender/Client ID** from *Encompass*.

Lender Name/Organization Name	
Lender/Client ID	
NMLS ID	

Note: The Lender/Client ID can be found at the top right of the Encompass screen (see image below). For more information on New Lender Setup, see Page 1 under *Prerequisites* in the **Stewart Title Company Plugin User Guide**.



Section 2: Adding a Point of Contact (Admin)

In the table below, enter a Point of Contact (Admin) to be the Authorizer(s) of User Account Setups.

#	First Name	Last Name	Title	Email Address	Phone Number	Address	City	State	Zip
1	<i>First</i>	<i>Last</i>		<i>email_id@lender.com</i>	<i>(832) 222-5565</i>	<i>9700 Bissonnet</i>	<i>Houston</i>	<i>TX</i>	<i>77036</i>
2									
3									
4									
5									
6									



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Section 3: Adding Employee Access

In the table below, enter the list of employees requesting access to the Stewart Title Company Plugin to Encompass.

Note: The Encompass User ID can be used as the Preferred Lender User ID.

Employees Requiring Access to Stewart's Plugin

#	First Name	Last Name	Email Address	Preferred Lender User ID
1	John	Smith	Jsmith@myemail.com	jsmith
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				



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Section 4: Removing Access to the Plugin

Complete the required fields below to remove a Lender user from accessing the Stewart Title Company Plugin to Encompass:

In the table below, enter the Point of Contact (Admin) who no longer requires Authorizer rights to User Account Setups.

#	First Name	Last Name	Title	Email Address	Phone Number	Address	City	State	Zip
1	<i>First</i>	<i>Last</i>		<i>email_id@lender.com</i>	<i>(832) 222-5565</i>	<i>9700 Bissonnet</i>	<i>Houston</i>	<i>TX</i>	<i>77036</i>
2									
3									
4									
5									

Use the table below to list employees who no longer require access to the Stewart Title Company Plugin to Encompass.

Note: The Encompass User ID can be used as the Preferred Lender User ID.

Employees Requiring Access to Stewart's Plugin				
#	First Name	Last Name	Email Address	Preferred Lender User ID
1	<i>John</i>	<i>Smith</i>	<i>Jsmith@myemail.com</i>	<i>jsmith</i>
2				
3				
4				
5				

Once all fields are complete, email this form to your Stewart Representative at lenderregistration@stewart.com to complete registration or request additional assistance.

To receive confirmation of Lender User Setup, please provide the name and email address of your Stewart Representative.

Stewart Representative Name:

Stewart Representative Email:

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Section 5: Required Fields

For Internal Use Only by Stewart

The required information below must be completed before submitting to Stewart's Customer Care. Lender Setup may be delayed if all information is not provided.

Select the checkbox below to indicate the Order Type(s) to be supported in the Lender Portal.

Note: Lenders have the option to route orders to Stewart Direct Offices. The Direct Office option is selected by default.

CTS Purchase

CTS Refinance

Direct Office Orders

Complete the fields below:

ResWare Employee ID:

ResWare Partner ID:

CTS Pricing GUID:

CTS BDO:

CTS Escrow Officer:

CTS Policy Type:

Note: All CTS Clients have the option to select another office location in the Lender Portal. If this Lender not a CTS Client, only select the Agency Orders checkbox, or use the Direct Office Orders checkbox (that is selected by default).

If you are unsure about your CTS Pricing GUID, contact Enterprise Pricing Solutions at enterprisepricingsolutionsteam@stewart.com.