Stewart Title Company Encompass Plugin

User Guide

July 1, 2023

Table of Contents

Introduction

This document walks you through the on-boarding process to use the **Stewart Title Company Plugin** within the *Ellie Mae Encompass* application. This integration between Stewart and Encompass lenders permits users to submit loan order request, confirm status of work performed, receive loan documents and view loan results from within the Plugin.

Key Features of the Stewart Title Company Plugin

Using this plugin, you can:

- Place new orders – **Refinance, HELOC,** and **Purchase** transaction types
- Check the status of submitted orders
- Receive, send, and view documents
- Select a Stewart office to route an order to
- Link loan files
- Obtain Title fee quotes for the **Stewart Rate Calculator**
- Automatically import title fee quote data into the **Encompass 2015 Itemization Form**
- Send communications via the notes service
- Request new account access to the Plugin

Prerequisites

You must be setup to use the Stewart Title Company Plugin.

Setup Lender with Stewart Title Company

An on-boarding process is required for Lenders to get set up to use the *Stewart Title Company* plugin into *Encompass*. Lenders can get setup with the Stewart Title Company plugin in two ways:

Request Access from the Plugin

1. From Encompass, select Stewart Title Company
2. Go to Services
3. Select Title and Closing
4. Select Stewart Title Company – Vendor Integration
5. Select **Request Access**. You will be prompted to email a Stewart representative.

Or Download the Form Online

1. Go to the Encompass Integration with Stewart webpage
2. Select the Download Setup Form
3. Complete and submit to **lenderregistration@stewart.com**

Access to Email

A *Desktop Email Client* application, such as **Microsoft Outlook**, must be installed to use the Request links.

Lender Setting Options

If you are interested in using any of these **Setting** options, please contact **Stewart Title Customer Care** at customercare@stewart.com to get set up.

See details of these below:

1. Limit Personas to Place or Cancel Order
2. Limit Personas to Calculate of Import Fees
3. Display Endorsements Individually or Total in One Total Fee
4. Change the Quote Document Name
5. Import Title Fees to the Settlement Service Provider List
6. Hide the Amount column for Title Fees on the Settlement Service Provider List
7. Set Title Insurance as the Service Category on the Settlement Service Provider List
8. Remove the .PDF File Extension on Document Imported from Stewart
9. Specify a Folder/Placeholder for Imported Documents
10. Set Default for HELOC Loans to Insured or Uninsured
11. Option to not import Seller fees into the 2015 Itemization form
12. Apply defaults on Import Fees into 2015 Itemization form

Limit Personas to Place or Cancel Orders

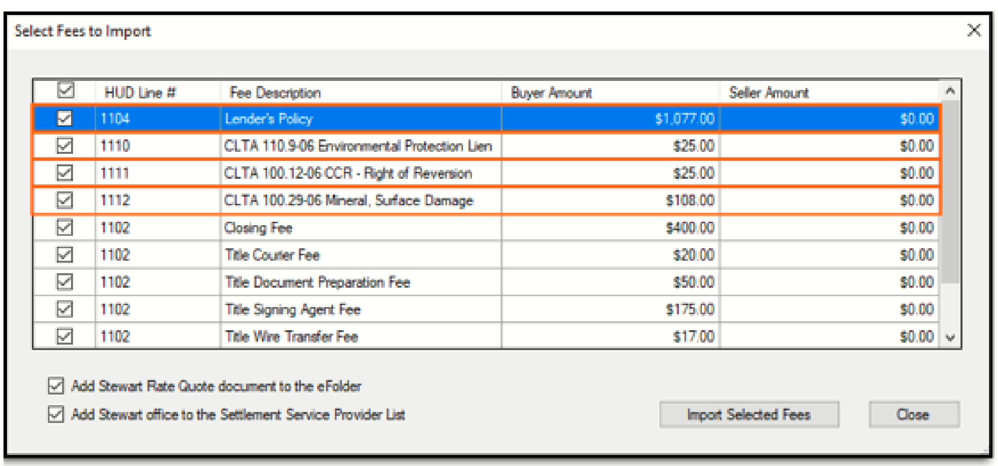
You can limit the access to placing and canceling orders on a **Loan** by persona. If a user is not allowed to take these actions on a **Loan**, the **Place Order** and **Cancel Order** buttons will be disabled on that user's plugin.

Limit Personas to Calculate and Import Fees

You can limit the access ability to **Calculate** or **Import Fees**. These buttons are disabled if the user is not enabled to take such actions on a **Loan.**

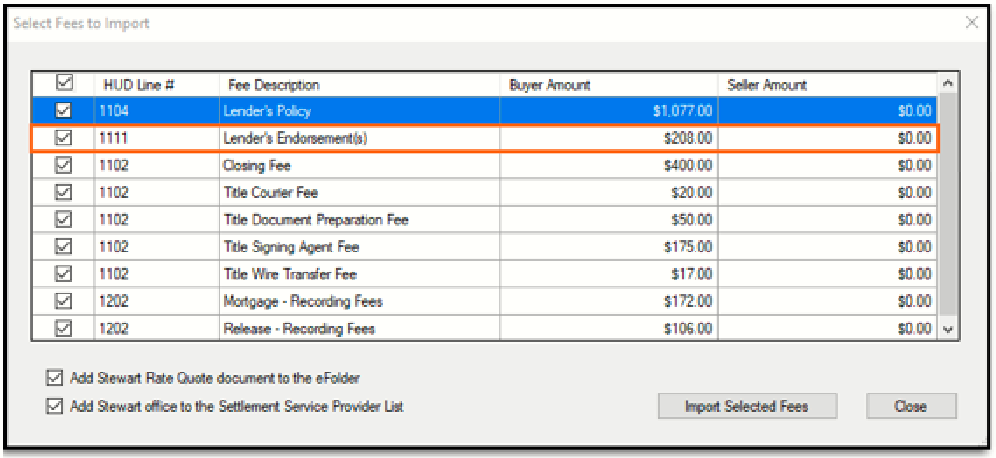
Display Endorsements Individually or In One Total Fee

You have the option to display **Endorsements** individually or in one total fee. With this setting enabled, each **Endorsement** displays on its own line of the **2015 Itemization Form.**



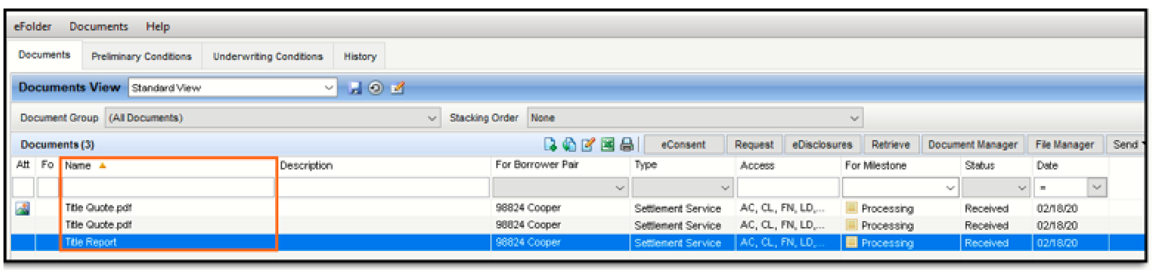
Display Endorsements Total on One Line

You have the option to display **Endorsements** as one total (of all the **Endorsements**) on one line.



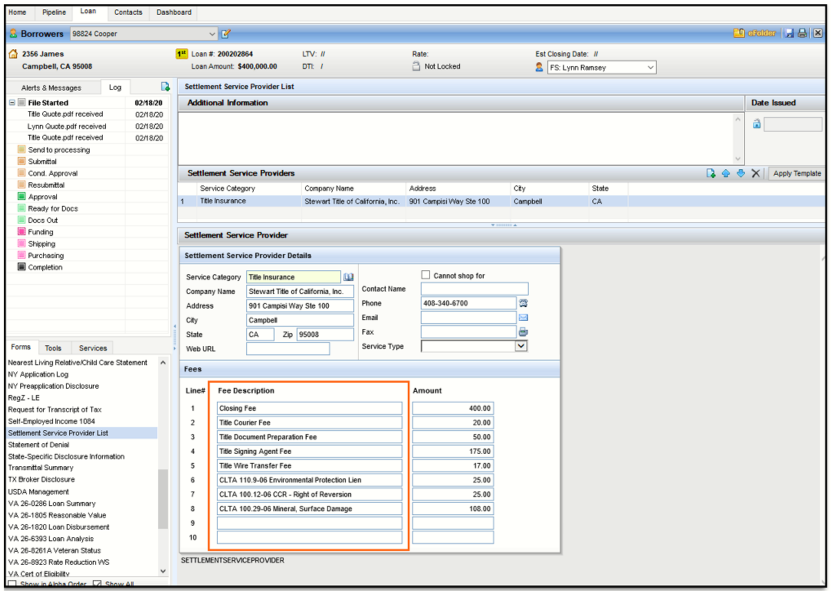
Ability to Change a Quote Document Name

Using this setting, you can change the **Stewart Rate Quote** document name to another name relevant to your company.



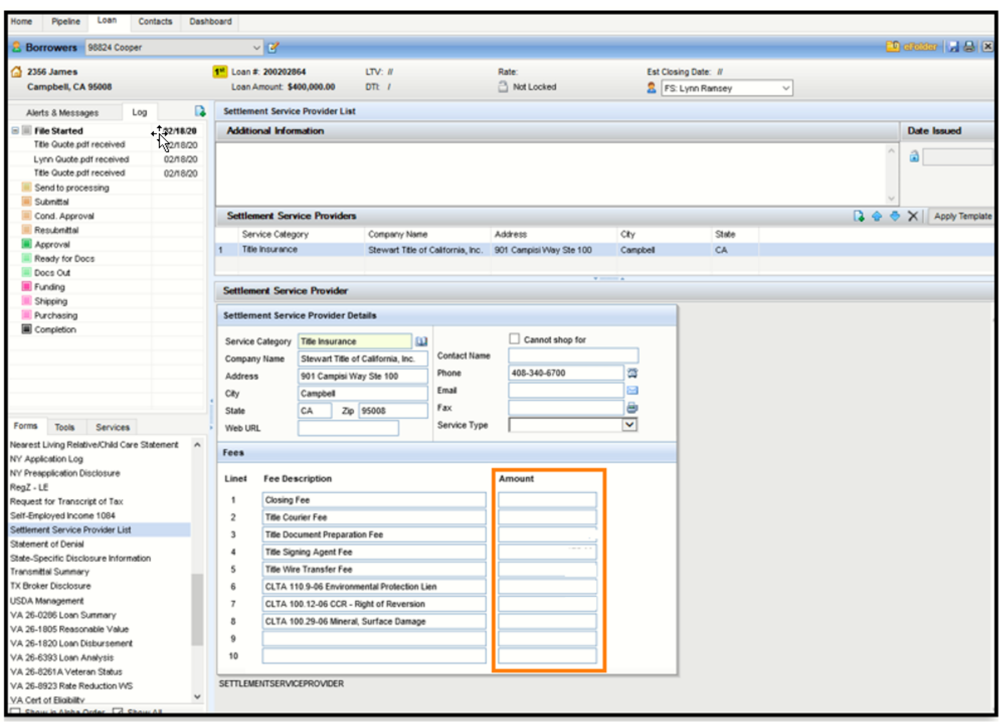
Option to Import Title Fees to Settlement Service Provider List

Using this setting, you can import **Title Fees** to the **Settlement Service Provider List Fee Description** table, for Stewart Title Company. This option displays all the **Title** fees in the **Fee Description** table in the **Settlement Service Provider** list (*up to 10 fees).*



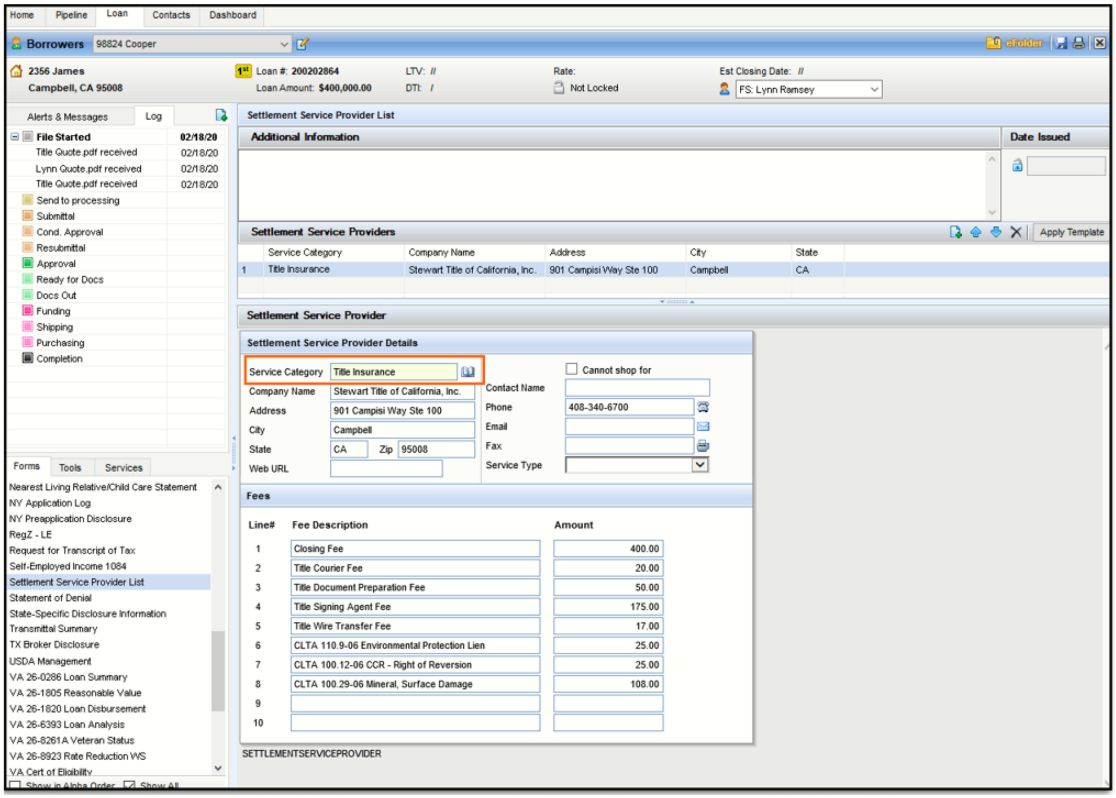
Option to hide the Fee Amounts on Import Title Fees to Settlement Service Provider List

Setting available to hide the Amount column on the imported **Title Fees** to the **Settlement Service Provider List Fee Description** table.



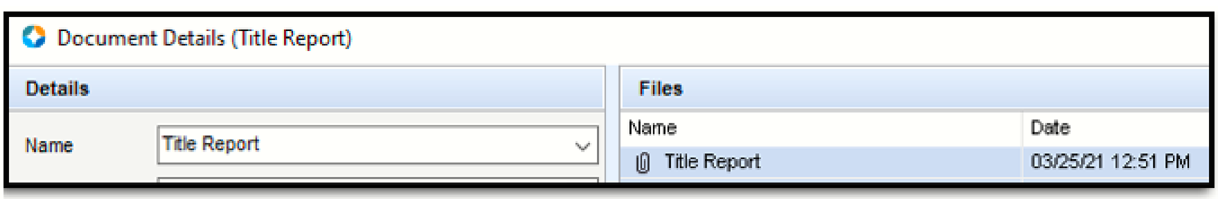
Import the Service Category as Title Insurance for Settlement Service Provider List

You can import to the **Settlement Service Provider List**, **Title Insurance as the Service Category**, for Stewart Title Company.



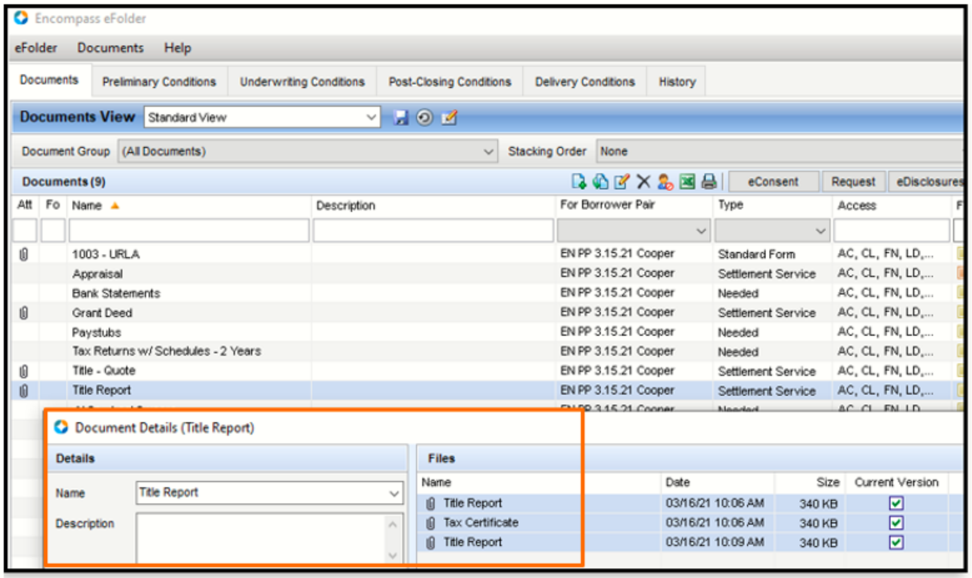
Option to Remove the .PDF file extension from Stewart documents

When documents are imported from Stewart, the file extension can be removed.



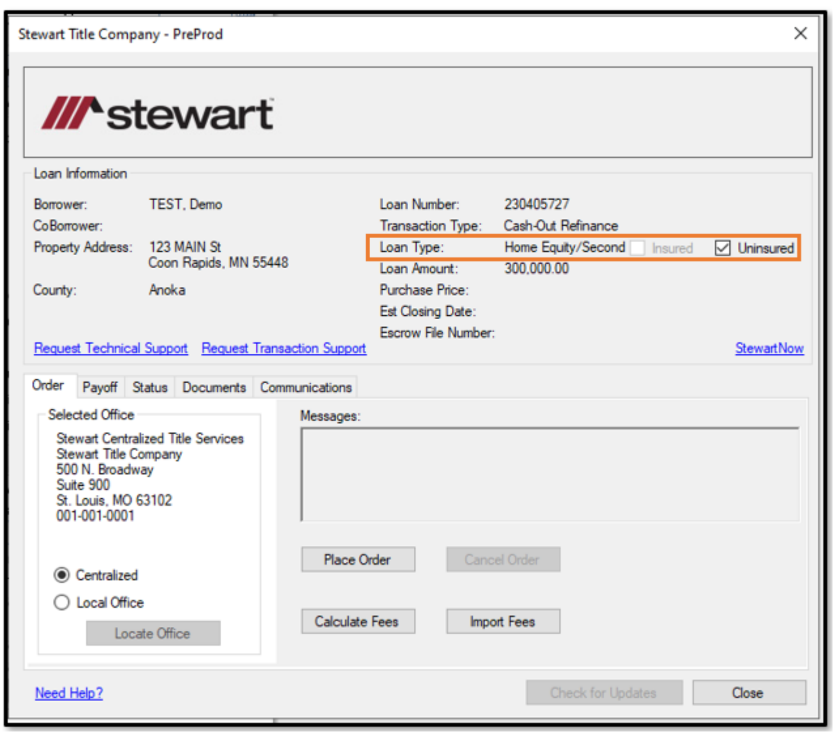
Option to Specify a Folder/Placeholder for Imported Documents

Imported documents can be place in a specified **Folder/Placeholder.** For example: All documents from Stewart. place in a **Title Documents Folder**. Or in the **Title Report** folder, import the **Title Report** and **Tax Certificate.**



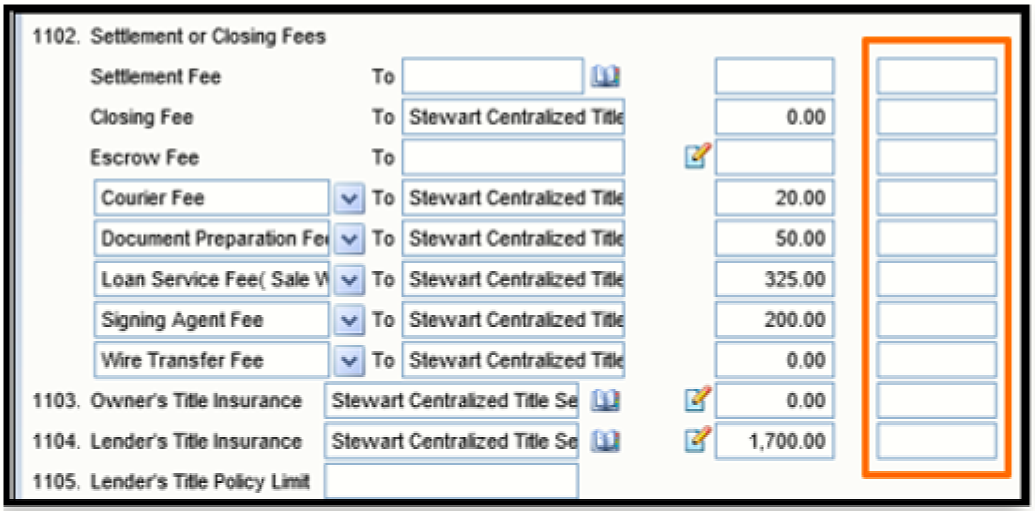
Option to Set Default for HELOC Loans to Insured or Uninsured

When **HELOC** is selected as the **Loan Type**; **Uninsured** or **Insured** can be set as a default for your company.



Option to not import Seller fees into the 2015 Itemization form

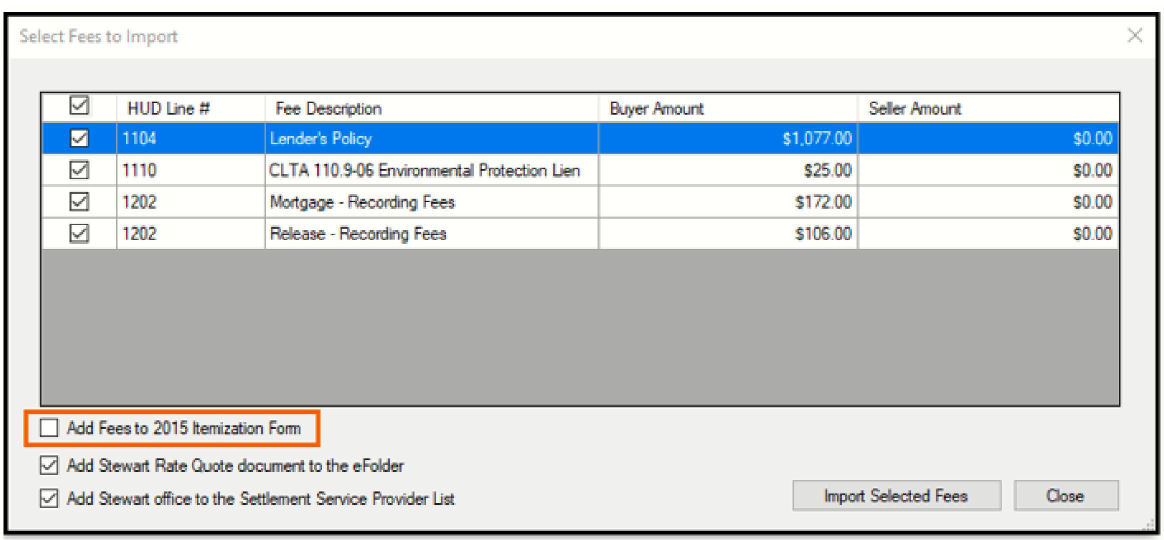
When option is set the **Seller** fees will not import to the **2015 Itemization** form.



Option to Set Defaults to Import Fees into 2015 Itemization form

Lender can request default options on how the **Import Fees** function will import to the **2015 Itemization form.**

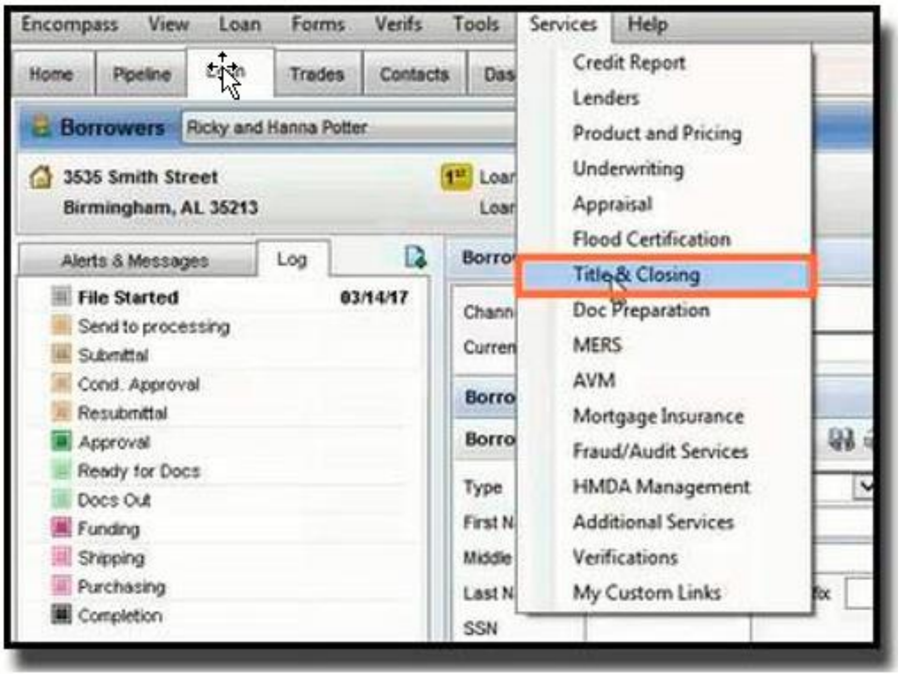
- Checkbox set to checked– **Fees** will be imported to **2015 Itemization -** This will be the **Default** for all **Lenders**
- unless otherwise requested
- Checkbox is unchecked - Selection box will be un-checked, but the user will have the ability to select if needed
- Checkbox is disabled – User will **not** have the ability to import fees to the **2015 Itemization form**
- Checkbox is set to checked and greyed – Fees will be imported to **2015 Itemization form** – User will **not** have the ability to deselect **Add Fees to 2015 Itemization form**



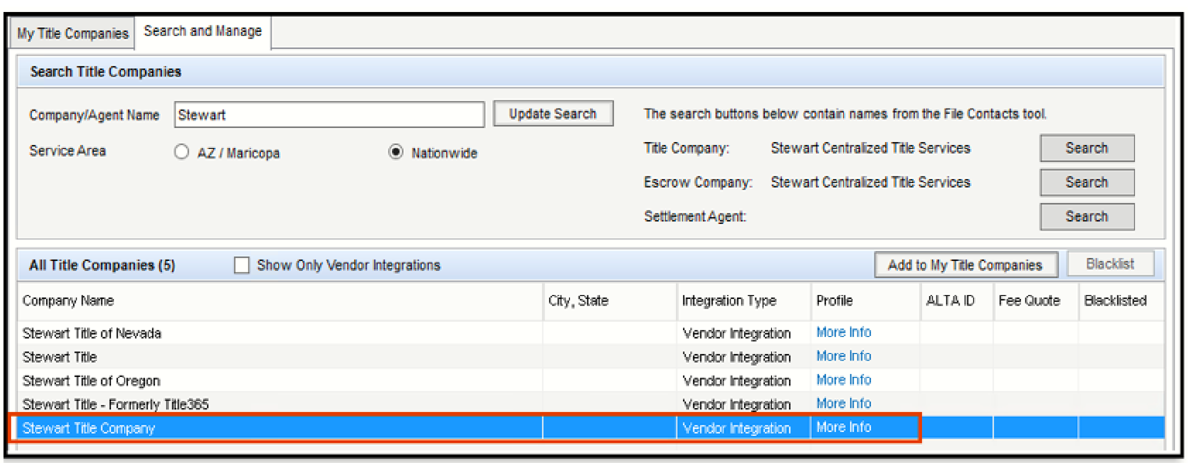
Launching the Plugin

Steps

1. From the *Encompass Services* menu, click the **Services** drop-down from the top menu, or the *Services* tab on the left side of the screen.
2. Select Title & Closing.



3. From the *Providers tab*, select **Stewart Title Company**.
4. In the *Search* text box, enter **Stewart Title** or **Stewart**. The *Order Title & Closing* pop-up displays with a list of search results.
5. From the *Order Title & Closing* pop-up, click **Stewart Title Company – Vendor Integration.**

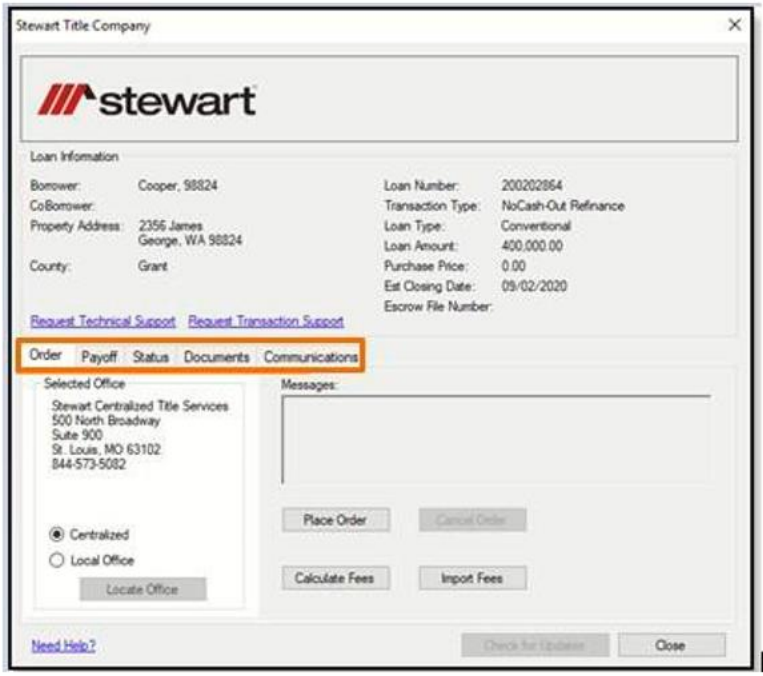


6. Under *All Title Companies*, select **Stewart Title Company.**

Note: Stewart Title Company will be added it to your **My Title Companies** tab.

Logging In

When the Plugin is launched for accounts that are already setup in Stewart, the *Order, Status, Document and Communications* tab displays



Request Access

If you do not yet have your account setup, click the **Request Access** button or link. The Stewart Connect team is notified and will contact you for more information (if needed) to quickly setup your account with Stewart.

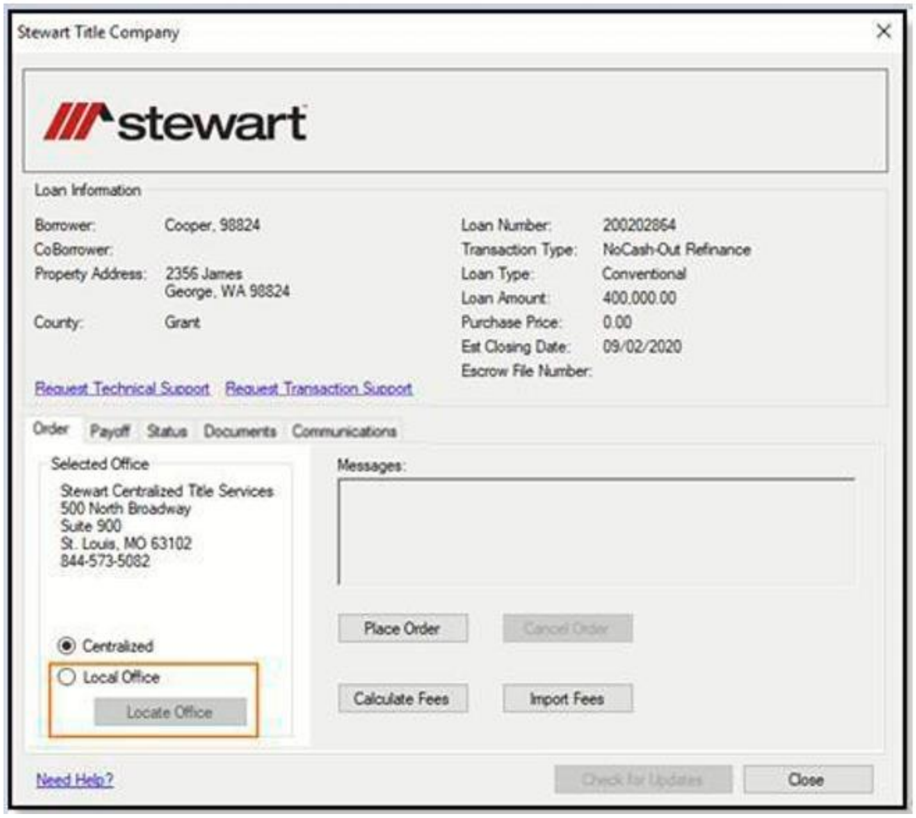
Order Tab

Once logged in, you can use the Order tab to begin processing your order. From the *Order tab*, you have the option to select a Stewart office to route an order request, place an order, calculate fees from the Stewart Rate Calculator, or to request the cancellation of an order that has been placed.

Note: Only pre-defined products, **Refinance**, and **Purchase** Transactions are eligible to be ordered.

Steps

1. Once logged in, the *Order* tab displays with the Order information.
2. Select a Stewart office to route the order.

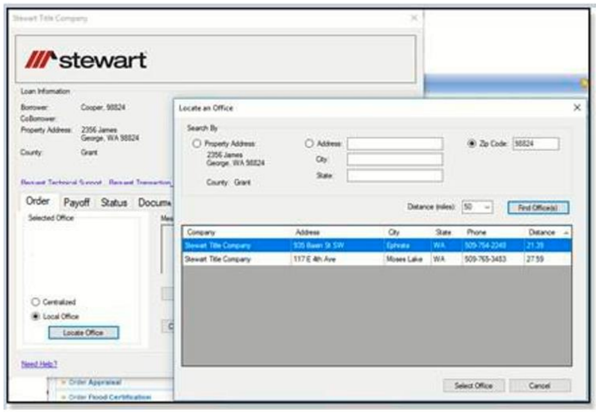


Note on Selecting an Office:

If the Lender has a contract with Stewart Centralized Title Services (CTS), that location will automatically be denoted under the Selected Office section.

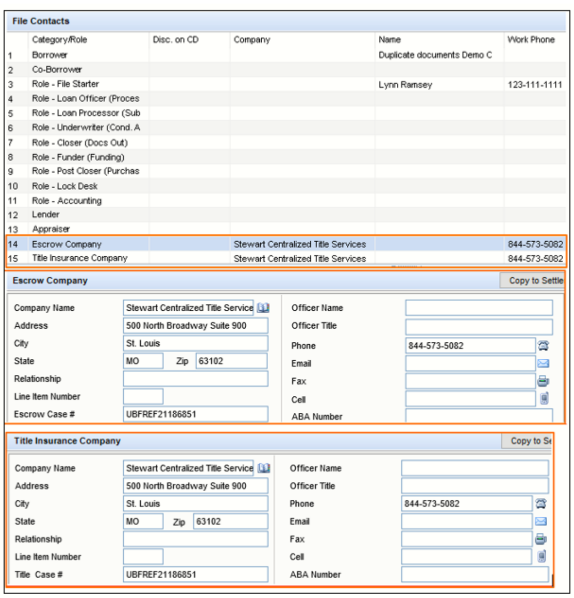
Lenders also have the option to select a different Stewart office to route an order request. Click the **Local Office** button. A pop-up displays with the property address included with the order, along with options to search for a Stewart office by a different address or zip code.

3. A Stewart office can be located using the property address included with the request. You can also enter another address or zip code to locate the Stewart office.



4. When an office is located and selected, that office displays under the **Selected Office** section of the **Order** tab.

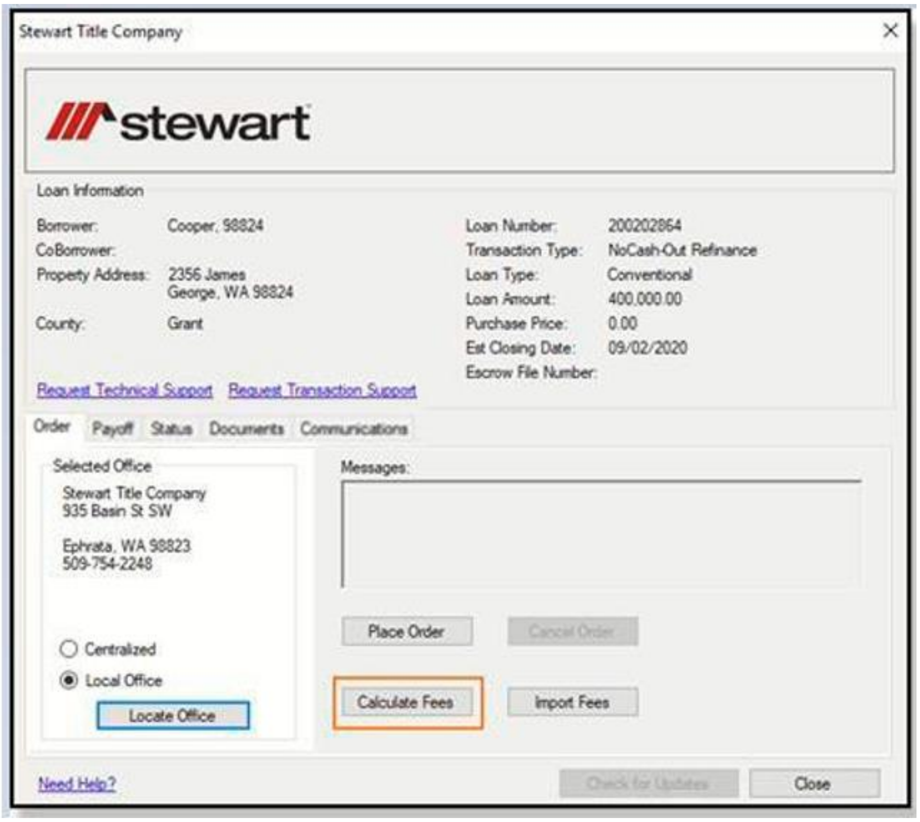
5. Upon receipt of the *Escrow File Number*, the *Office Name*; *Address*; *Phone Number,* the Escrow File Number will populate the **File Contacts** for the Escrow Company, Title Insurance Company, and Settlement Agent.



Calculating Fees

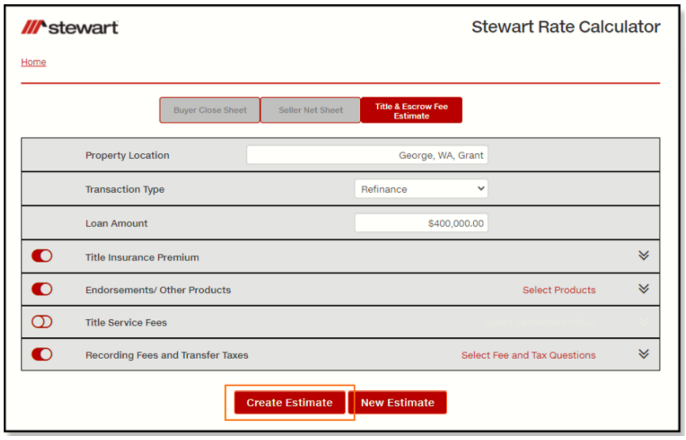
From the Order tab, you also have the option to **Calculate Fees** from the Stewart Rate Calculator to receive a quote.

Note: When calculating fees, the preferred browser for using the Stewart Rate Calculator is **Google Chrome**.



Steps

1. Click **Calculate Fees**. The *Stewart Rate Calculator* screen displays with pre-populated information for **County, City, State**, and the **Transaction Type** from the *Order* screen.
2. From the *Stewart Rate Calculator* screen, complete the fields on the form.
3. Enter the Sales Price and Loan Amount.
4. Review the Title Insurance calculations for the Premium percentage splits.
5. Some Endorsement may already be defaulted. You can add/remove endorsements using **Select Products**.
6. Review Title Service Charges.
7. Depending on the state there may be additional questions to be answered in the **Select Fee** and **Tax Questions**.
8. Review **Recording Fees** and **Transfer Taxes**. Be sure to indicate the **Payee** for the **Recording Fee.**
9. Click the **Create Estimate** button. No additional information is required.

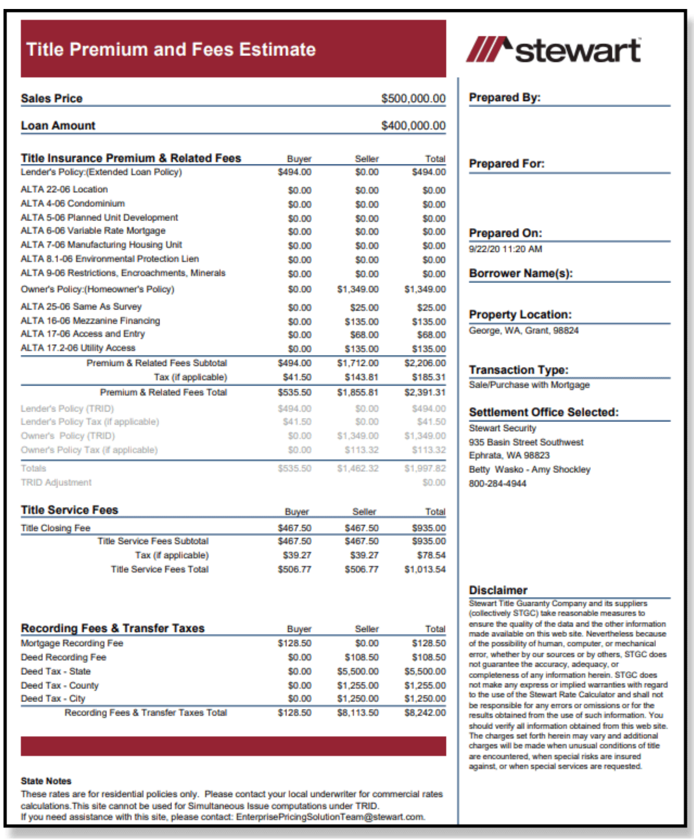


10. Click **Download**. A PDF quote displays.

Note: The TRID Premiums, Endorsement Amounts, Title Service Fees, and Recording Fees/Transfer Taxes can be imported into the *Encompass 2015 Itemization Form*. For your records and to add other fees to the *Itemization Form*, please click the Download PDF button to save a copy of the quotes from the *Stewart Rate Calculator* to your local machine before exiting the screen. You can also save this PDF in the Encompass e-Folder.

11. To import the **TRID Premiums**, **Endorsement Amounts**, **Title Service Fees**, and/or **Recording Fees/Transfer Taxes**, close the *Stewart Rate Calculator* and return to the *Stewart Title Company* plugin. Use the PDF copy of the quotes for your reference (if needed).

Note: For Refinances, the Title Insurance Premiums will be imported with no TRID Premiums.



Title Premium and Fees Estimate

Sales Price	$500,000.00
Loan Amount	$400,000.00

Title Insurance Premium & Related Fees	Buyer	Seller	Total
Lender's Policy:(Extended Loan Policy)	$494.00	$0.00	$494.00
ALTA 22-06 Location	$0.00	$0.00	$0.00
ALTA 4-06 Condominium	$0.00	$0.00	$0.00
ALTA 5-06 Planned Unit Development	$0.00	$0.00	$0.00
ALTA 6-06 Variable Rate Mortgage	$0.00	$0.00	$0.00
ALTA 7-06 Manufacturing Housing Unit	$0.00	$0.00	$0.00
ALTA 8.1-06 Environmental Protection Lien	$0.00	$0.00	$0.00
ALTA 9-06 Restrictions, Encroachments, Minerals	$0.00	$0.00	$0.00
Owner's Policy:(Homeowner's Policy)	$0.00	$1,349.00	$1,349.00
ALTA 25-06 Same As Survey	$0.00	$25.00	$25.00
ALTA 16-06 Mezzanine Financing	$0.00	$135.00	$135.00
ALTA 17-06 Access and Entry	$0.00	$68.00	$68.00
ALTA 17.2-06 Utility Access	$0.00	$135.00	$135.00
Premium & Related Fees Subtotal	$494.00	$1,712.00	$2,206.00
Tax (if applicable)	$41.50	$143.81	$185.31
Premium & Related Fees Total	$535.50	$1,855.81	$2,391.31
Lender's Policy (TRID)	$494.00	$0.00	$494.00
Lender's Policy Tax (if applicable)	$41.50	$0.00	$41.50
Owner's Policy (TRID)	$0.00	$1,349.00	$1,349.00
Owner's Policy Tax (if applicable)	$0.00	$113.32	$113.32
Totals	$535.50	$1,462.32	$1,997.82
TRID Adjustment			$0.00

Title Service Fees	Buyer	Seller	Total
Title Closing Fee	$467.50	$467.50	$935.00
Title Service Fees Subtotal	$467.50	$467.50	$935.00
Tax (if applicable)	$39.27	$39.27	$78.54
Title Service Fees Total	$506.77	$506.77	$1,013.54

Recording Fees & Transfer Taxes	Buyer	Seller	Total
Mortgage Recording Fee	$128.50	$0.00	$128.50
Deed Recording Fee	$0.00	$108.50	$108.50
Deed Tax - State	$0.00	$5,500.00	$5,500.00
Deed Tax - County	$0.00	$1,255.00	$1,255.00
Deed Tax - City	$0.00	$1,250.00	$1,250.00
Recording Fees & Transfer Taxes Total	$128.50	$8,113.50	$8,242.00

State Notes
These rates are for residential policies only. Please contact your local underwriter for commercial rates calculations.This site cannot be used for Simultaneous Issue computations under TRID.
If you need assistance with this site, please contact: EnterprisePricingSolutionTeam@stewart.com.

Prepared By:

Prepared For:

Prepared On:
9/22/20 11:20 AM

Borrower Name(s):

Property Location:
George, WA, Grant, 98824

Transaction Type:
Sale/Purchase with Mortgage

Settlement Office Selected:
Stewart Security
935 Basin Street Southwest
Ephrata, WA 98823
Betty Wasko - Amy Shockley
800-284-4944

Disclaimer
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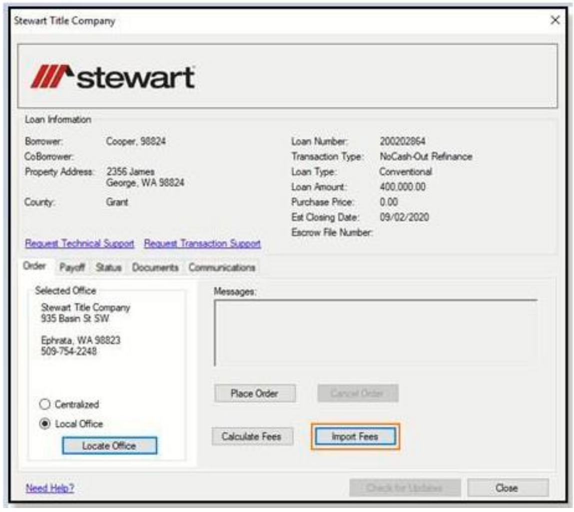
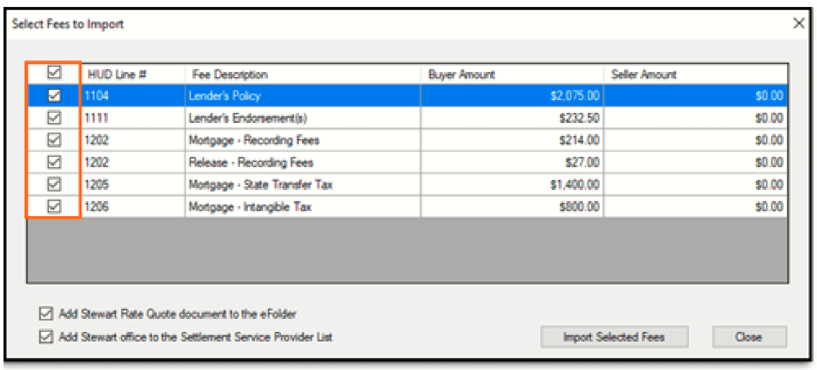
12. From the *Stewart Title Company* Plugin, click the **Import Fees** button to import from the options of **TRID Premiums**, **Endorsement**, **Title Service Fees**, and **Recording Fees/Transfer Tax** amounts.



13. The *Select Fees to Import* screen displays. From this screen, select the fees to import into Encompass. By default, notice all are selected. You can accept the default or make changes as needed.



14. (Optional) From the *Select Fees to Import* screen, you also have the following options:

    - Accept the default to **Add Stewart Rate Quote documents to the eFolder**. When this checkbox is selected, the Stewart Fee Quote is sent to the Encompass eFolder.
    - **Add Stewart office to the Settlement Service Provider List**. When this checkbox is selected, the selected Stewart Office is added to the Settlement Provider List in Encompass.

15. Click the **Import Selected Fees** button.

Note on Calculating Fees:

Not all fees are currently available for import. However, a copy of the PDF can be downloaded and saved to your local machine and can then be added to the **Encompass e-Folder**.

Note on Additional Fees:

The following tax fees have been imported into the Stewart Rate Calculator:

- **Florida** Mortgage – Intangible tax (line 1206 on the 2015 Itemization Form)
- **Minnesota** – Mortgage Conservation Fund
- **Minnesota** – Deed Conservation Fund

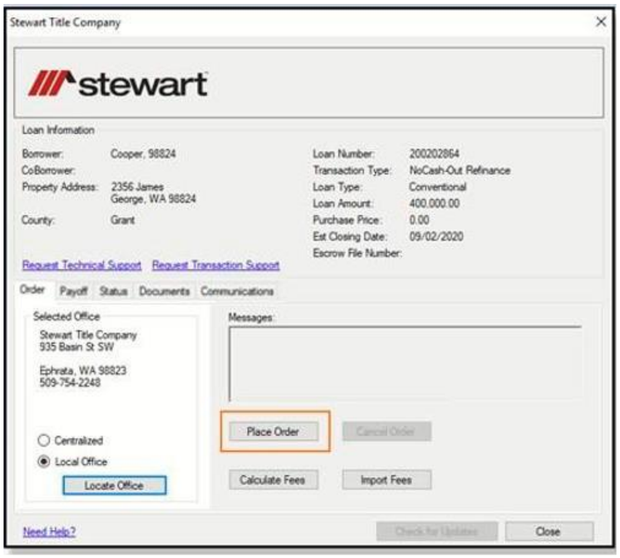
Place Order on the Order Tab

Return to the *Order tab* to place the Encompass order.

Note: When an order is submitted, the option to select a Stewart office for order routing is disabled.

Steps

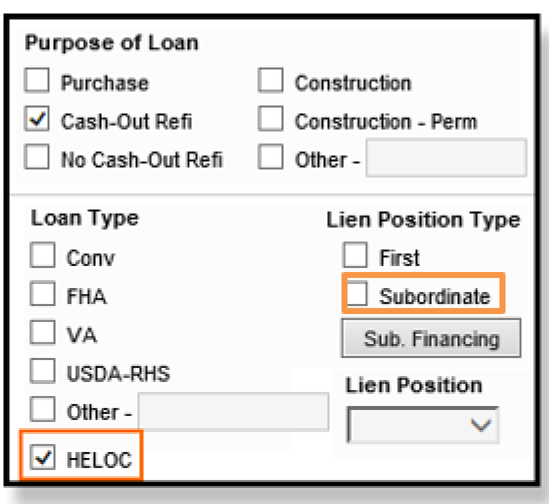
1. The Plugin is populated with data from the Encompass loan file. Click Place Order when you are ready to submit the file.



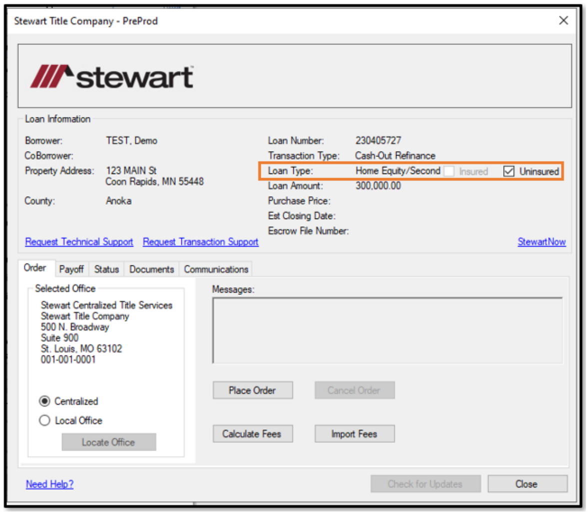
Note: To send Payoff information with Place Order, please see steps below.

For **Home Equity/Second Loans**, additional steps are required:

- When the Loan Type in Encompass is **HELOC,** or Lien Position Type is **Subordinate** or **Second**
- The Stewart Integration page shows Home Equity/Second as the Loan Type.



- Two new required options will appear:

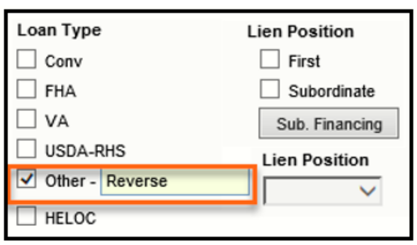


- **Insured** – Title Insurance is need on this loan
- **Uninsured** – Title Search Only (i.e. – Property Report, Owner & Encumbrance Report aka O&E, etc.) – no Title Insurance

Note: A default value can be set. Please contact Stewart at customercare@stewart.com to set a default for this value.

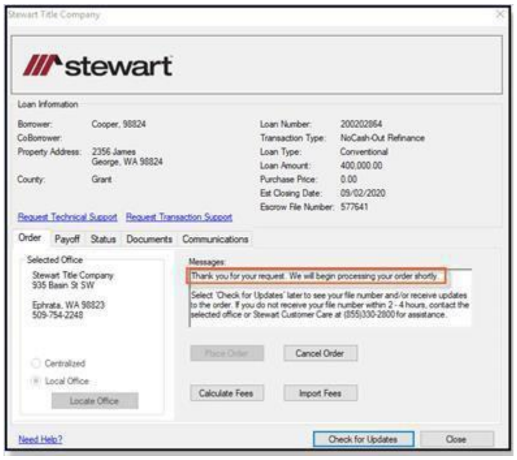
For **Reverse** Loans, additional steps are required:

- When the Loan Type in Encompass is **Other**

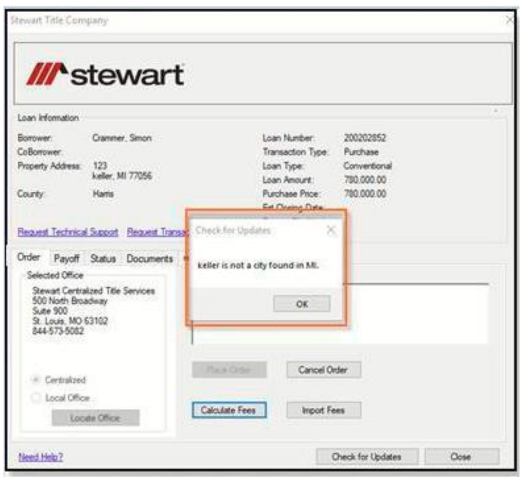


- Stewart Integration Page shows **Other** as the Loan Type
- A required option will appear
- Select Reverse if Loan Type is a **Reverse Mortgage**

2. Once the order is submitted, a message displays confirming the order processing was sent.



3. If there is an error with your order, a message displays in the *Check for Updates* pop-up indicating any issues with placing an order.



4. Click **OK** to continue. A pop-up displays to confirm your order successfully sent.

Note: If the *Check for Updates* pop-up displays, identifying an issue with the order, you will need to add/edit the missing item in Encompass before the order can be placed successfully

Ability to send Corporation/Trust data

Information from the Borrower Information – **Vesting for Corporation/**Trust information will send with **Place Order**.

For this option, you must have at least one Borrower's Information filled in.

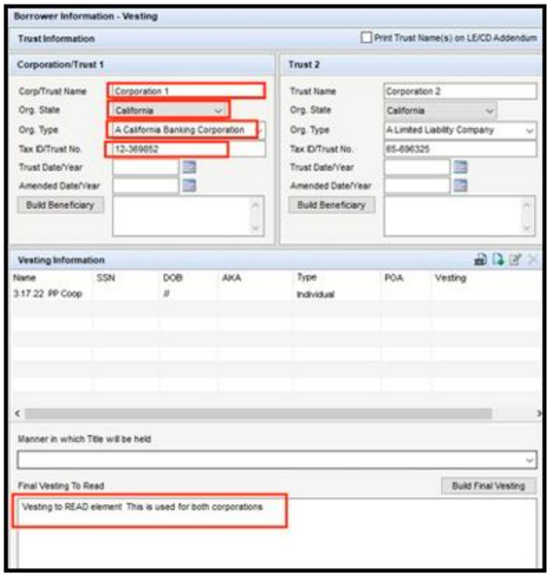
Steps

1. On the **Borrower Information – Vesting** form, enter in the data.

Note: Corp/Trust Name is required.

2. Fields available to send are:

- Corp/Trust Name – **Required**
- Org State
- Org Type
- Tax ID/Trust No.
- Final Vesting to Read

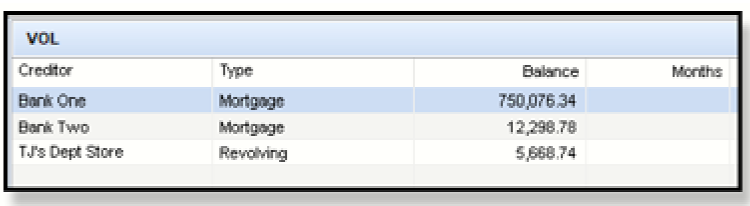


Send Payoff Information with Place Order

Payoff Information can be sent along with Place Order.

Steps

1. Enter Liabilities on the VOL form. All Mortgage Type liabilities will be sent to the Payoff tab on the integration screen.

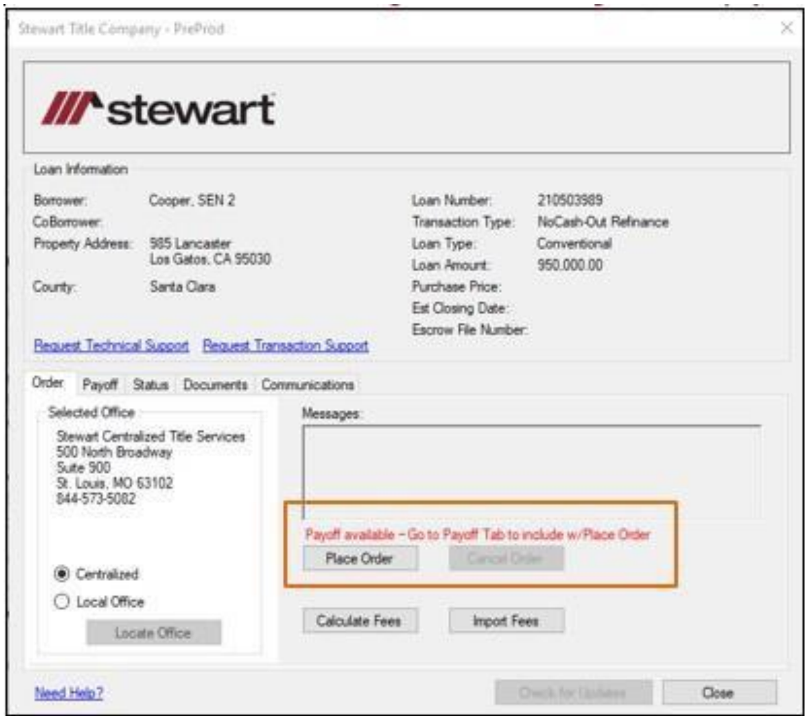


VOL

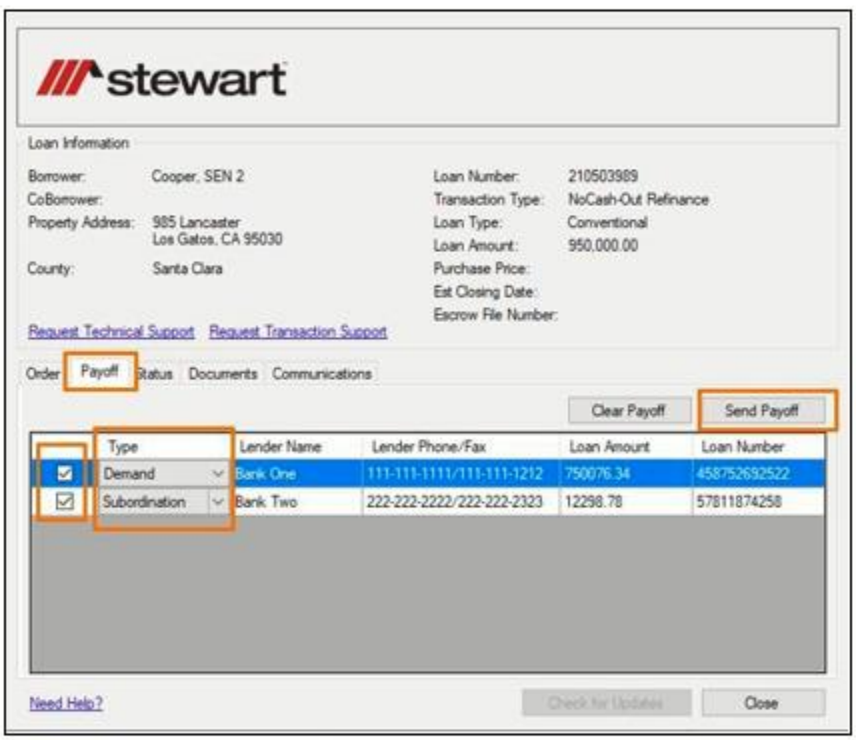
Creditor	Type	Balance	Months
Bank One	Mortgage	750,076.34	
Bank Two	Mortgage	12,298.78	
TJ's Dept Store	Revolving	5,668.74	

Note: As of June 2021, HELOC Types are also included.

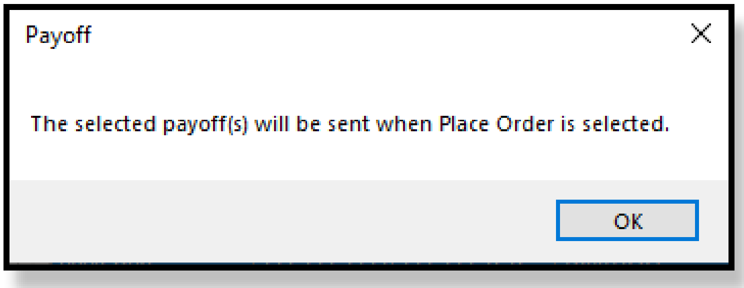
2. Go **to Services – Title & Closing**. On the *Order* tab, notice a message in red indicating there are payoff(s) available to be sent when placing an order.



3. Go to the Payoff tab to make your selections.
   - Select the Type of Payoff from the drop-down.
   - Choose Demand or Subordination
   - Select all checkboxes of the items you would like include with the order placement
   - Select **Send Payoff**



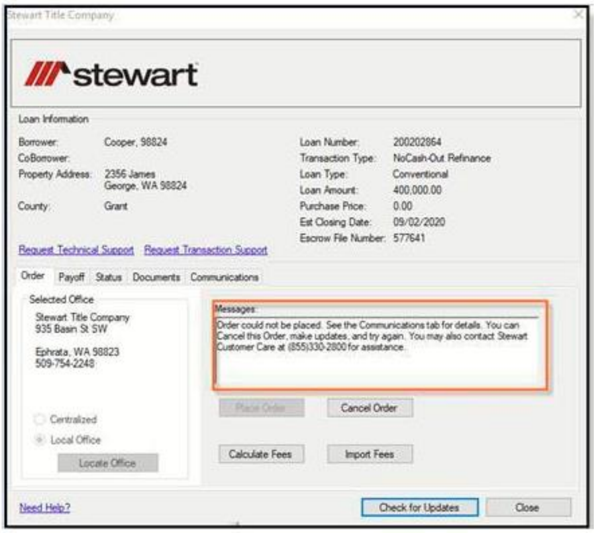
4. Message will appear. The selected payoffs will be sent when the **Order** is placed.



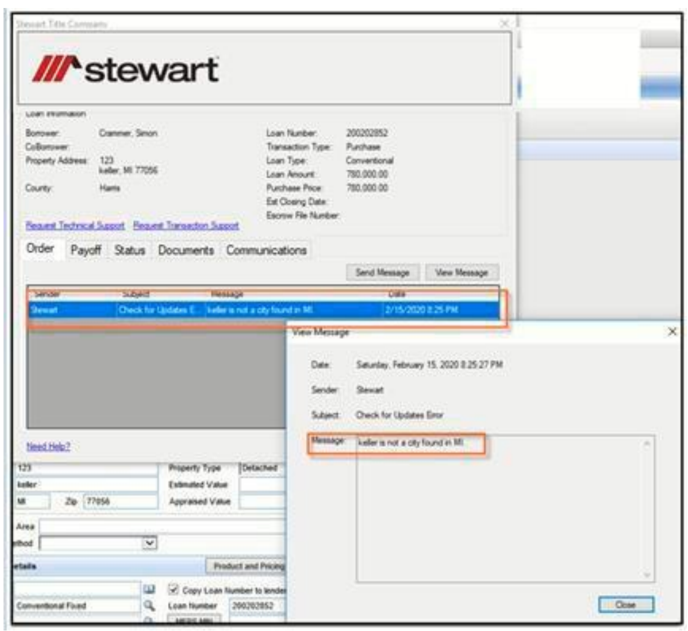
5. Go to the **Order** tab once the **Order** is placed. The **Payoff** message disappears.

Editing an Order If an Error Displays

If after clicking **Place Order**, the order cannot be placed, you will see this message display in the **Messages** field on the *Order* tab.



You can also see the error or item that needs to be added/edited from the *Communications* tab.



Use the following steps if a file needs to be changed before placing an order.

Steps

1. Enter Liabilities on the VOL form. All Mortgage Type liabilities will be sent to the Payoff tab on the integration screen.
2. Go back to the **Encompass** loan.
3. Edit the item and Click **Save**.
4. Open Service/Order Title & Closing.
5. Login to Stewart Title Company.

6. Cancel the order.
7. Place the order again. If no error occurs, your order is being processed. The File Number and updates will display on the plugin later, when you select the **Check for Updates** button.

Note: If the *Check for Updates* pop-up displays, indicating an error you believe is incorrect, contact the Office selected or click **Request Transaction Support**.

Information on Linking an Existing Order

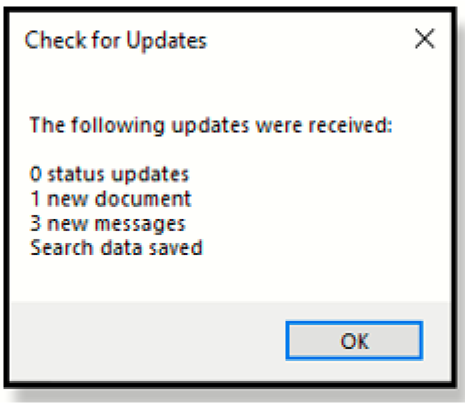
Orders initially opened by a directing third party, such as a realtor, can be linked by resubmitting the order through the *Stewart Title Company* plugin. Linking existing open orders provides all the benefits of integration on orders submitted directly by a realtor partner. Comments can be included in the *Communication* tab once the order is placed to convey other information related to the loan requests to be linked.

Check for Updates

Check for Updates can be used at any time while in the integration screen. Updates will also appear automatically when the screen is opened.

A popup appears showing the following updates if available

- When the Stewart Escrow File Number received
- Statuses
- Documents
- Messages
- Search Data Saved



Status Tab

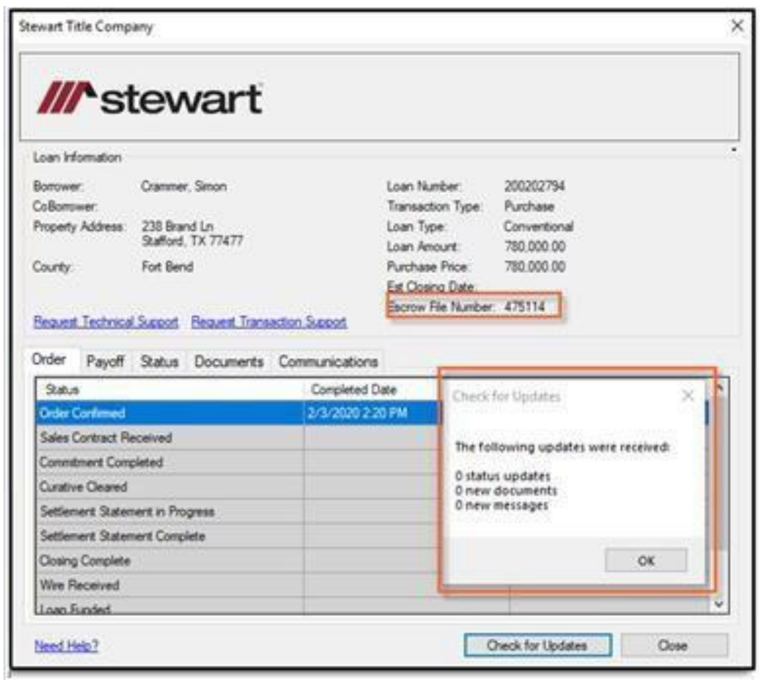
Use the *Status* tab to check the current status of a submitted order. Below is a list that defines each column in the Status grid:

- **Status** – The name of the task completed on the order.
- **Completed Date (CST)** – The date and time the task was completed.
- **Updated Date (CST)** – The date and time the task had been changed or edited.

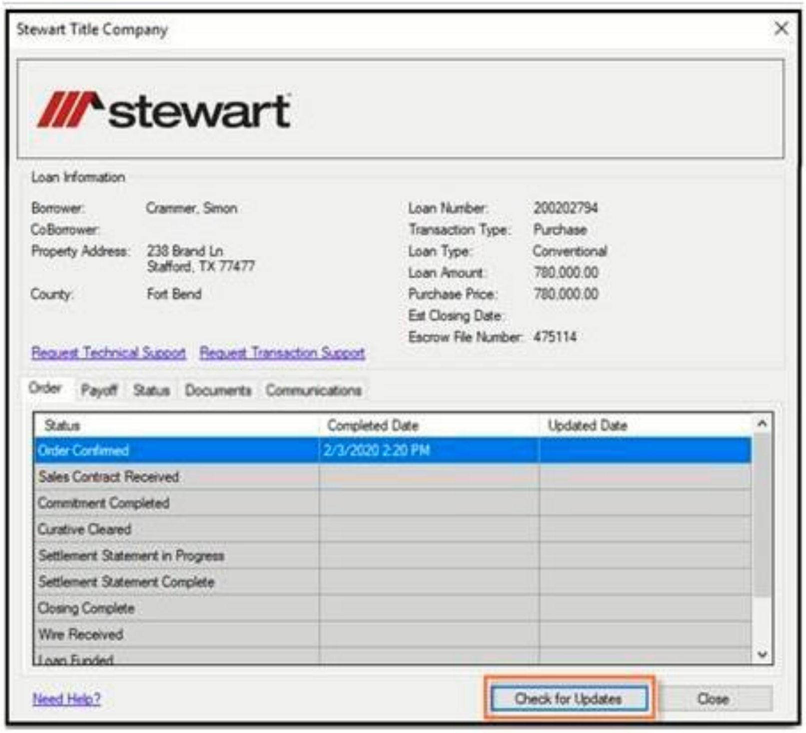
Steps

1. From the *Status* tab, click the **Check Status** button. A *Status* grid displays, detailing the available file statuses. As statuses are updated, the completion dates and times reflect in the Status grid.

Note: Once the order request is accepted for processing, the **Order Confirmed** date and time displays under the *Status tab*. The file number associated with the newly created order displays on the screen as the *Escrow File Number.*



2. Click the **Check Status** button to refresh the *Status* grid. Changes made to pre-defined status notifications will display in the *Status grid*, as well as the pop-up window.



Status/Milestone Definitions

The Statuses/Milestones supported are listed below. This pre-defined list represents the actions/steps configured to support the loan processing transaction workflow, which indicates tasks executed by team associates. All recorded milestones reflected in the Status grid represent successful completion of tasks.

- **Order Confirmed** – Notification that the order request has been accepted.
- **Curative Cleared** – Notification that the curative process is complete, and title is clear.
- **Commitment Completed** – Alert that the commitment has been delivered.
- **Settlement Statement in Progress** – Notifies the Lender that the preliminary settlement statement is being prepared.
- **Settlement Statement Complete –** Notifies the Lender that all modifications to the settlement statement are complete.
- **Closing Complete** – Notification that the loan closing has concluded, and loan documents have been executed.
- **Loan Funded** – Once file is disbursed, this status communicates completion.
- **Final Policy** – Alert users that the final title policy documents are sent.
- **Order Cancelled** – Serves as notification that a cancellation request has been submitted.
- **Sales Contract Received** – (*Purchase Transactions only*) Notification that the written agreement has been obtained.
- **Wire Received** – (*Purchase Transactions only*) All funds wired to the title or escrow company.

Document Tab

The *Documents* tab on the Plugin provides a central location for accessing electronic documents submitted, that are associated with the order. The Documents tab outlines document-related activities and records the submission date and time. Documents currently viewable from the *Stewart Title Company Plugin* include, but are not limited to:

- Curative Summary
- Disbursement Summary
- ALTA Settlement Statement / Fee Sheet
- Payoff
- Subordination
- Title Commitment
- Final Policy
- Signed Loan Package
- Tax Certificate
- Closing Protection Letter
- Sales Contract
- Property Survey
- Grant Deed
- HOA Certification

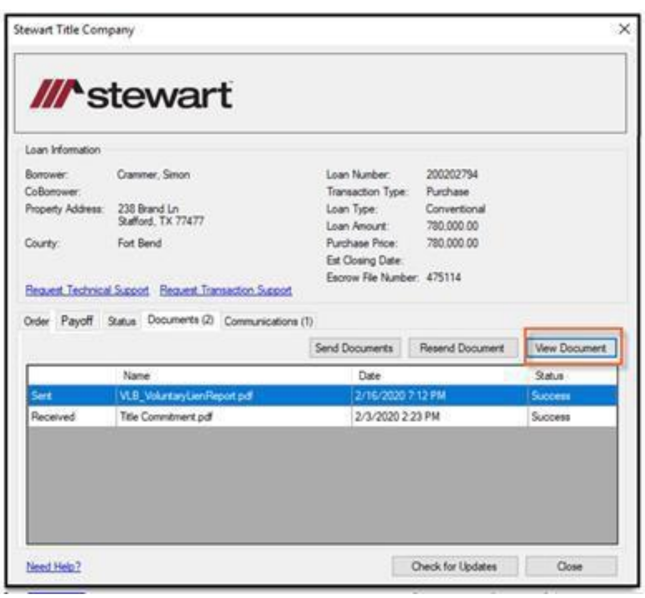
Documents display in the *Documents* grid. The documents received are saved and available in the *E-folder*, which tracks document-related activities.

Viewing Documents

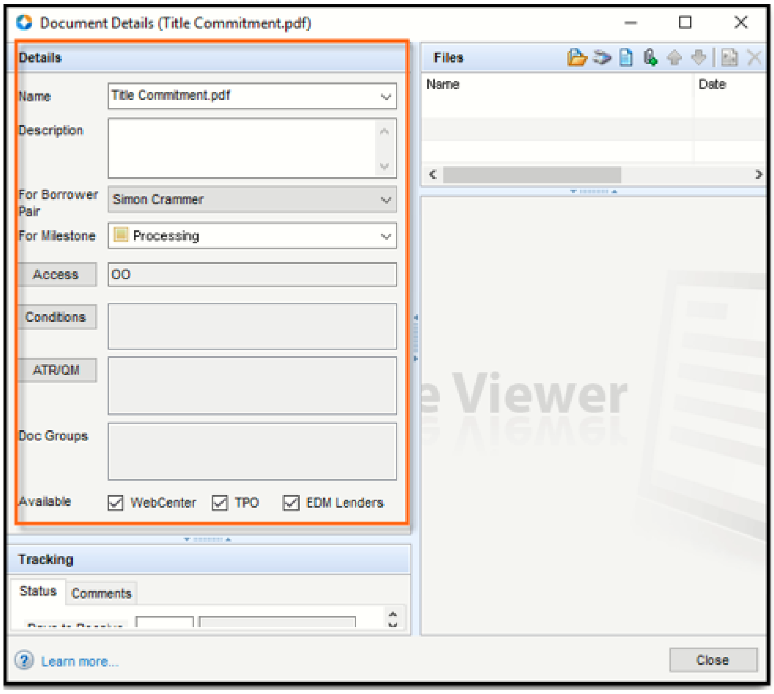
Click the **View Document** button to view documents within the *E-Folder*.

Steps

1. From the *Documents* grid, a list of available documents displays to view. Select the **file** to view.
2. Click View Document.



The *Document Details* screen displays the selected document within *E-Folder.*



Note: Hover your mouse over the lower-right corner of the screen to expand and enlarge the screen

Sending Documents

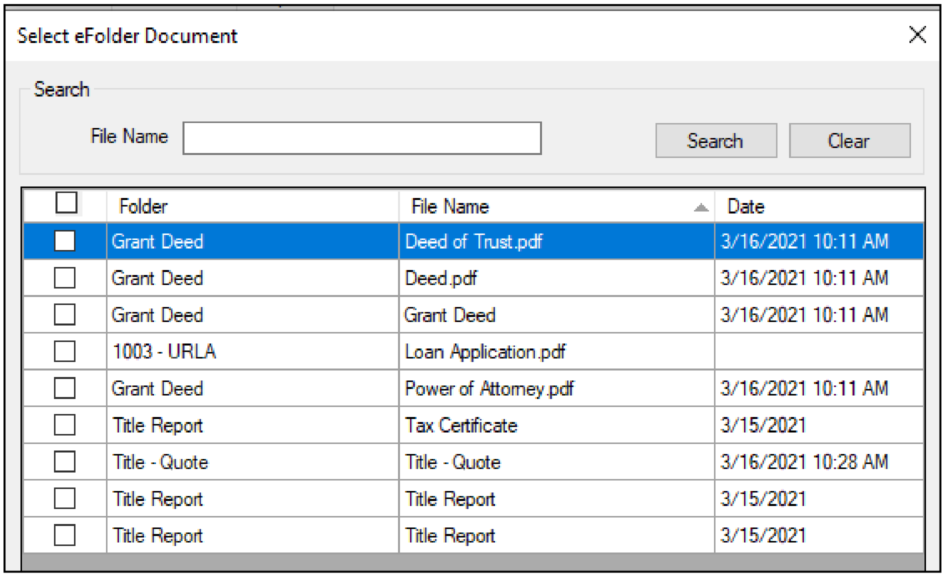
Send documents stored in the *E-Folder* from the *Stewart Title Company Plugin*.

Steps

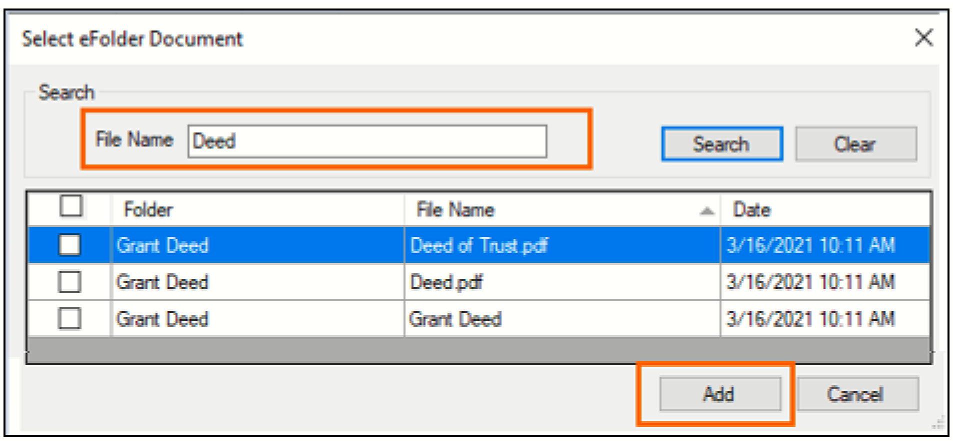
1. From *E-Folder* or File System, click the **Browse** button to select afile.

Note: Documents cannot exceed 10MB in size. An error message displays if the document file size is too large to send.

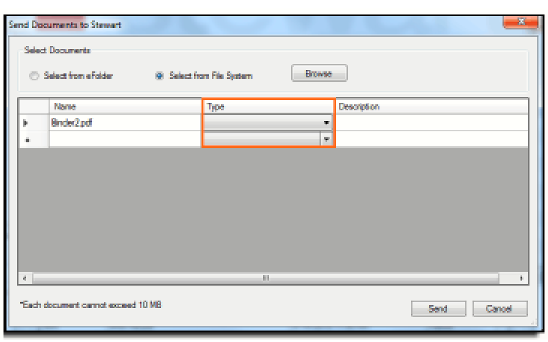
2. When browsing the eFolder the Folder Name and the File Name appears for easy selection.



3. Search option is available to help locate a File in the eFolder.
   - Enter File name or partial name
   - Select Search
   - Select File
   - Select Add

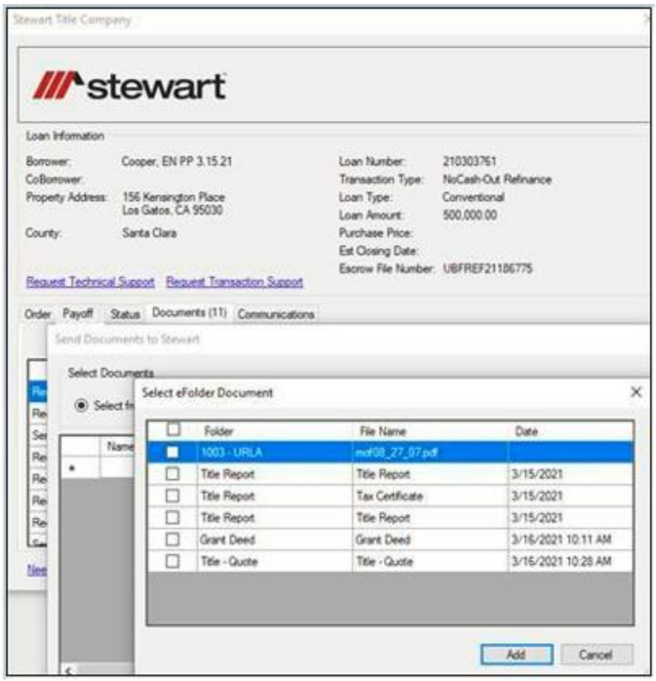


4. From the *Type* drop-down, select the **Document Type**. This field is <u>required.</u>

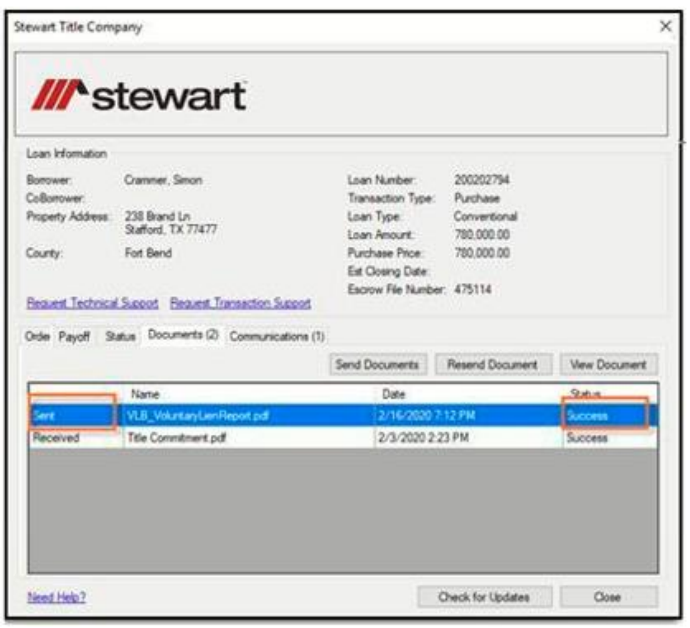


   You will see that the **Document Type** name also populates the *Description* field. The Description field is editable.

5. Click the **Send Documents** button. A pop-up displays, confirming the document was sent.



6. Click **OK** to continue. The status of the sent document(s) displays in the *Documents* grid.

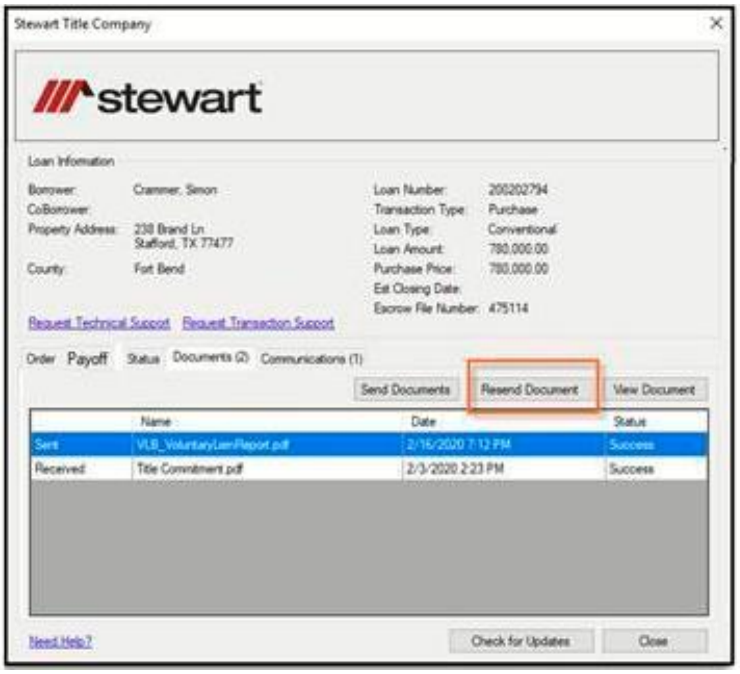


Resending Documents

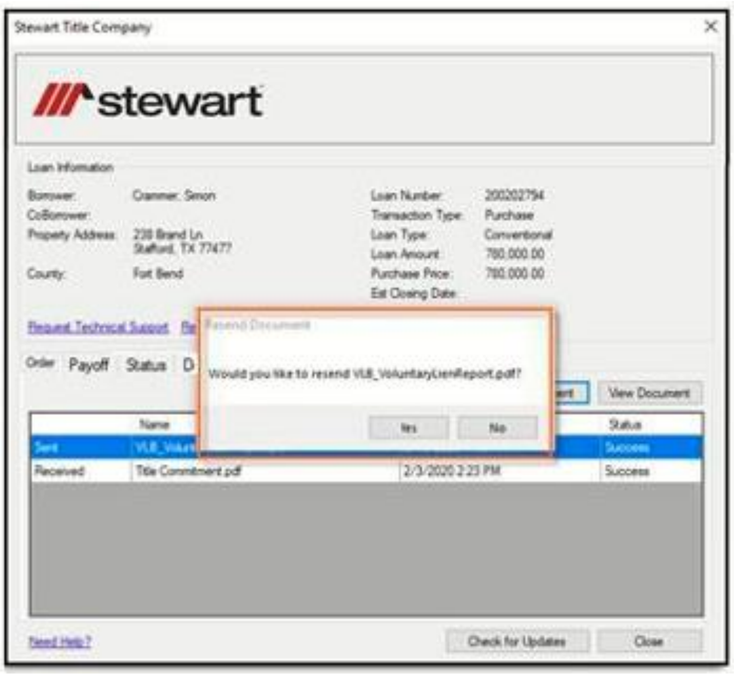
You can also resend documents from the *Stewart Title Company Plugin*.

Steps

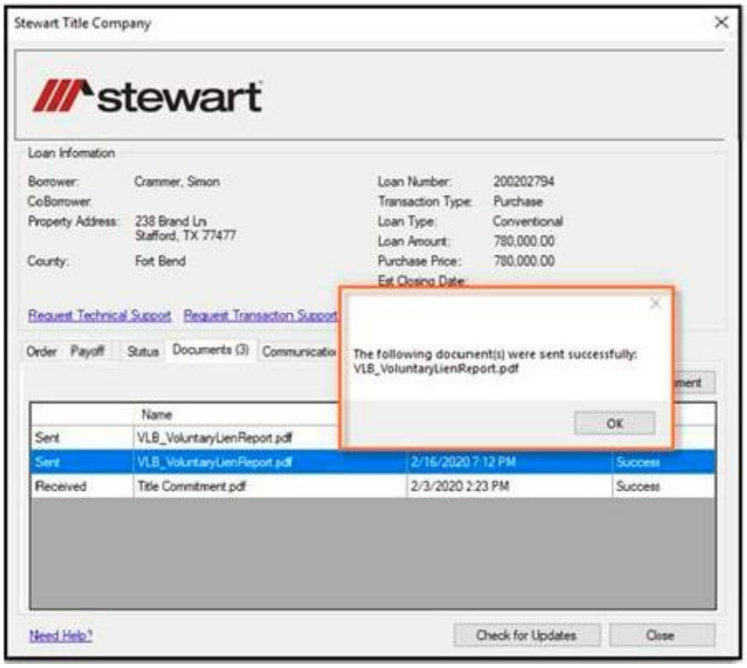
1. From the **Documents** tab, select the **Document Type** from thedrop-down. You will see that the Document Type name also populates the *Description* field. The Description field is editable.
2. Click the **Resend Documents** button.



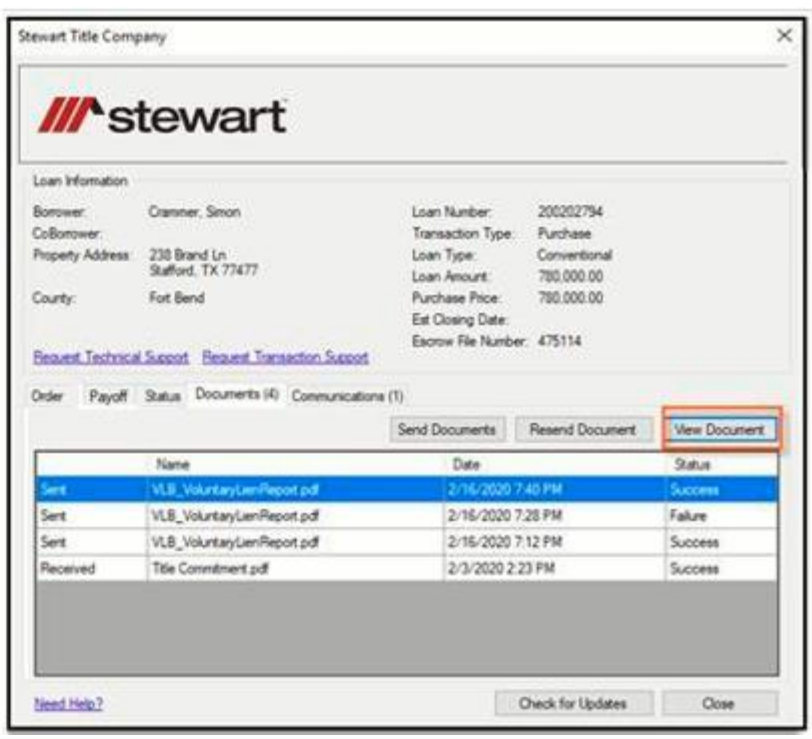
3. A pop-up displays, requesting to confirm that the document should be resent. Click **Yes** to continue.



4. Click **Yes** to continue. A pop-up displays, confirming the document was resent. Click **OK** to continue.



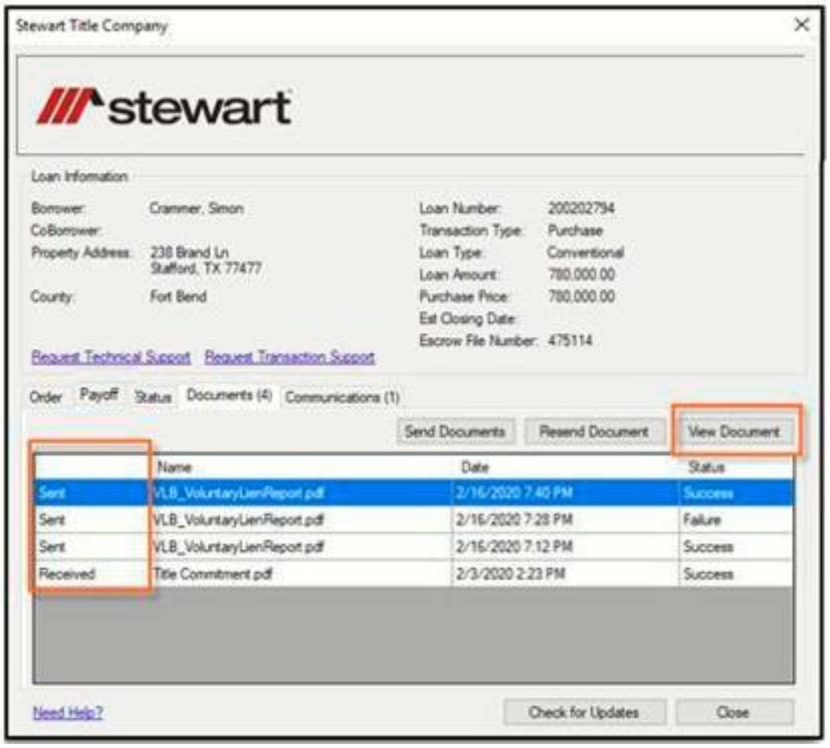
5. The resent document displays in the **Documents** grid. You can also view the document that was sent, or resend by selecting the document, and clicking the **View Document** button.



Viewing Received Documents

You can see the status of sent documents from the **Status** column of the *Documents* grid. You can also see that documents received by the **Title Company**.

Documents coming into **Encompass** from the **Title Company** are marked as **Received** in the first column of the *Documents grid*.

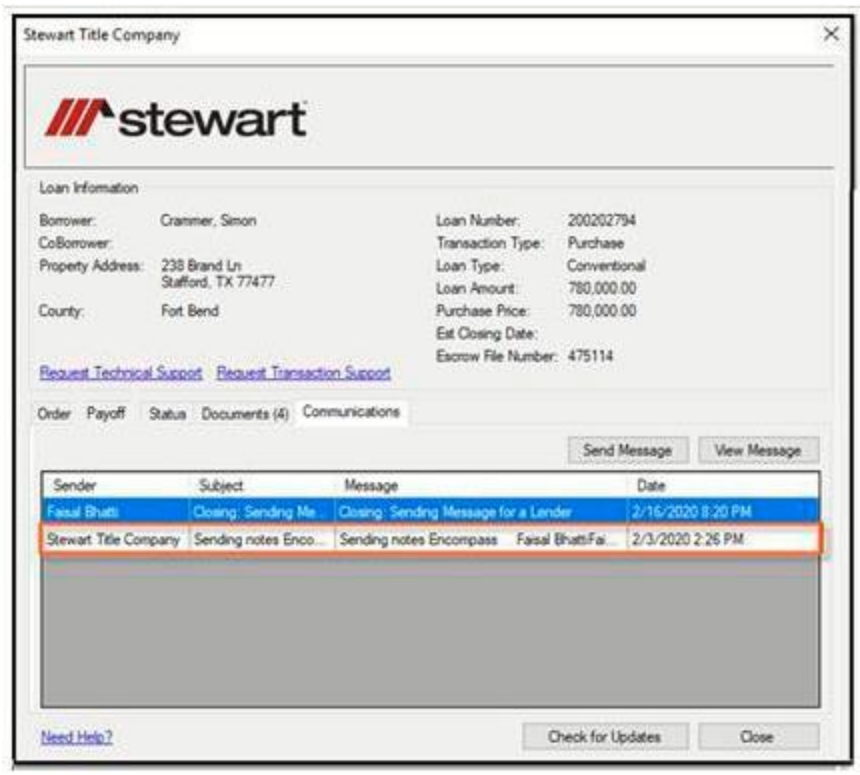


Communications Tab

The *Communications tab* allows the exchange of notes between the Lender and Stewart. The *Message History* grid on the bottom of the *Communications* tab maintains notes exchanged between the Lender and Stewart for reference.

Under *Message History*, the following fields display details about your messages:

- **Sender** – For Lenders, the Sender will be the name of the user logged into Encompass. For Title Company users, the Sender's name will be the name of the Title Company, and possibly the name of the user who sent the message (if available.
- **Subject** – A preview of the subject.
- **Message** – A preview of the body of the message.
- **Date** – The date and time the message was received.



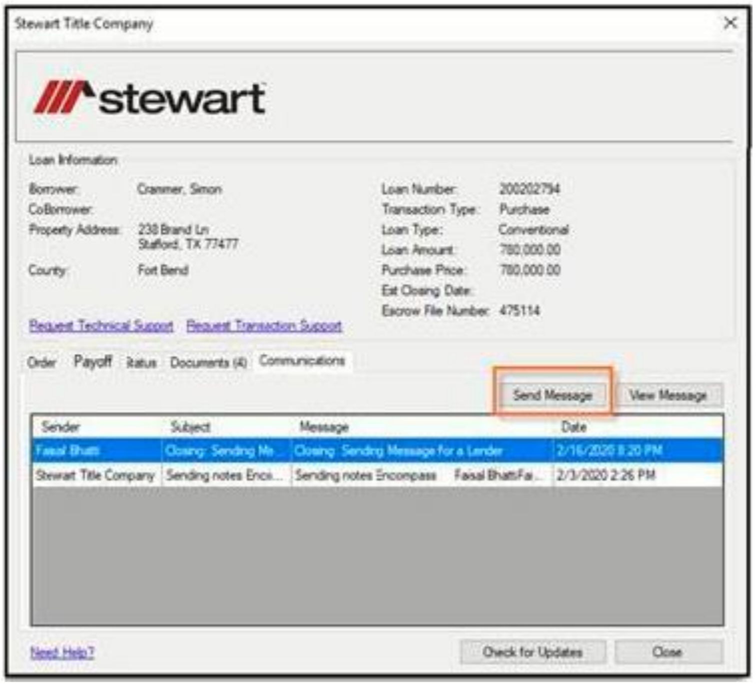
Note: To use the *Communications* tab, the Lender must first successfully submit an order request via the plugin.

Sending a Communication to a Title Office

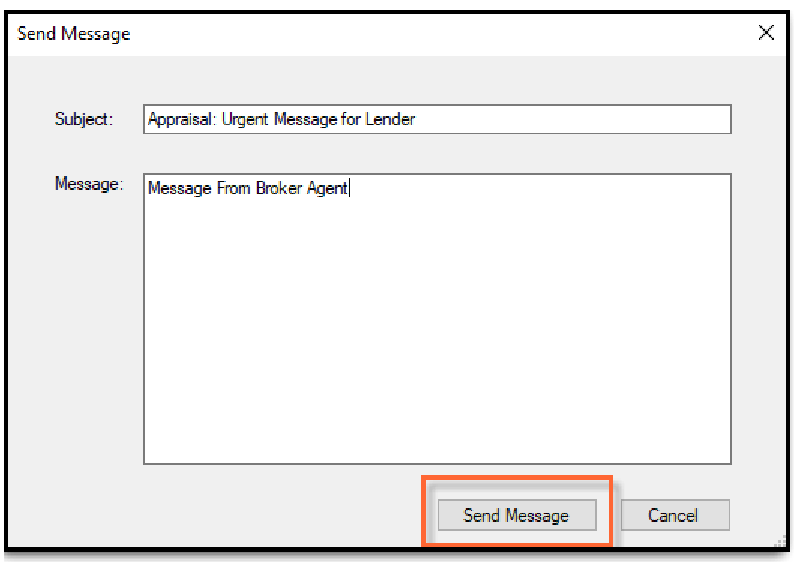
Both sent and incoming messages display in the Communications grid of the *Communications* tab. Follow the steps below to send a message to an Escrow Office from the *Stewart Title Company Plugin*.

Steps

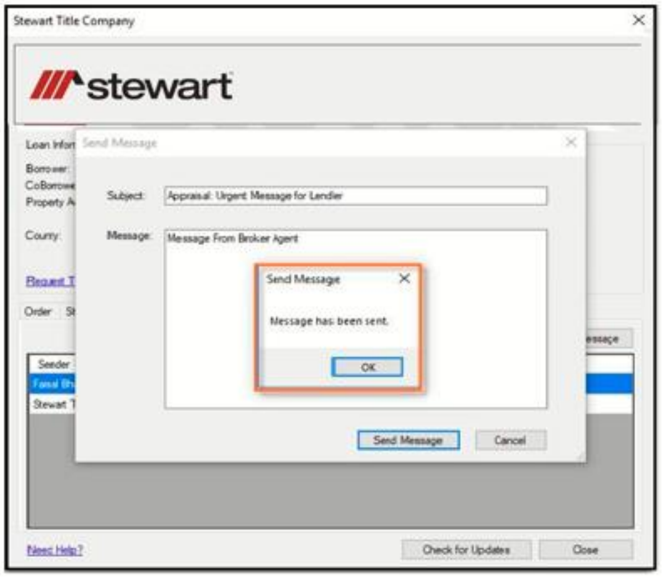
1. From the *Communications* tab, click **Send Message**. The *Send Message* pop-up displays.



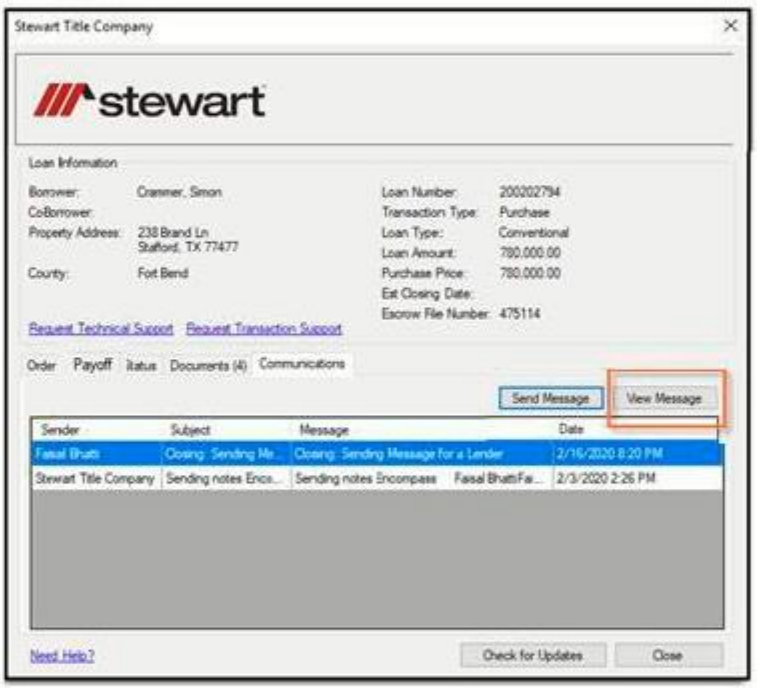
2. From the *Send Message* pop-up, enter the Subject and the body of the Message.
3. Click the **Send Message** button at the bottom of the pop-up. Another pop-up displays, confirming the Message has been sent.



4. Click **OK**. The **Sender's** name, abbreviated **Subject**, **Message Recipient** and **Date** display in the *Communications grid.*



5. To view the entire message, select the communication and click **View Message.**

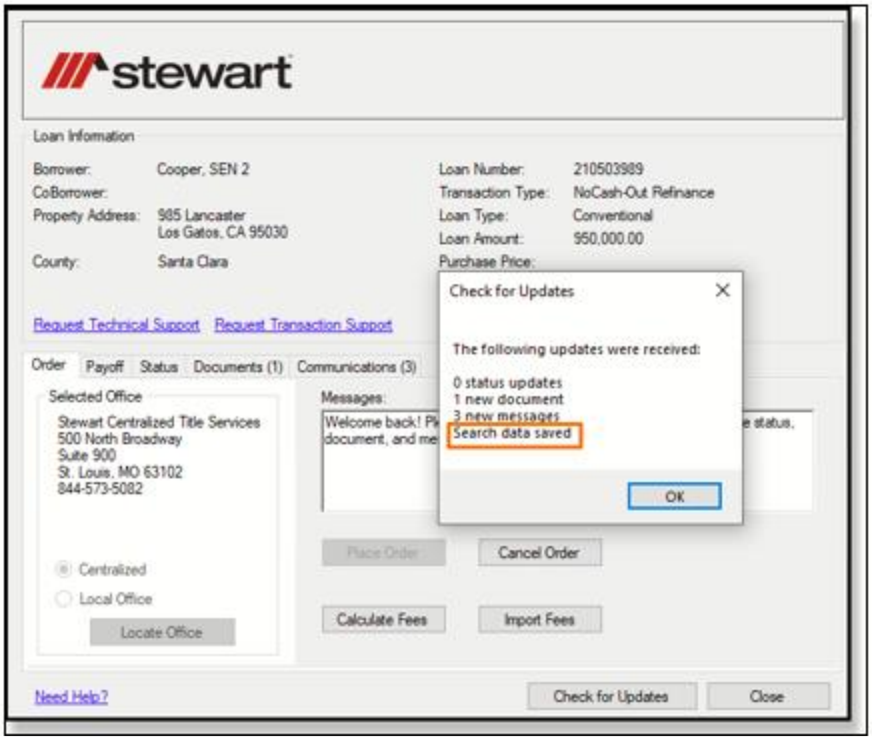


Note: Notes sent to the Lender display with the office name in the Sender column of the Communications grid. Notes sent by the Lender display as the name of the person signed into the *Stewart Title Company Plugin* when the message was sent.

Search Data

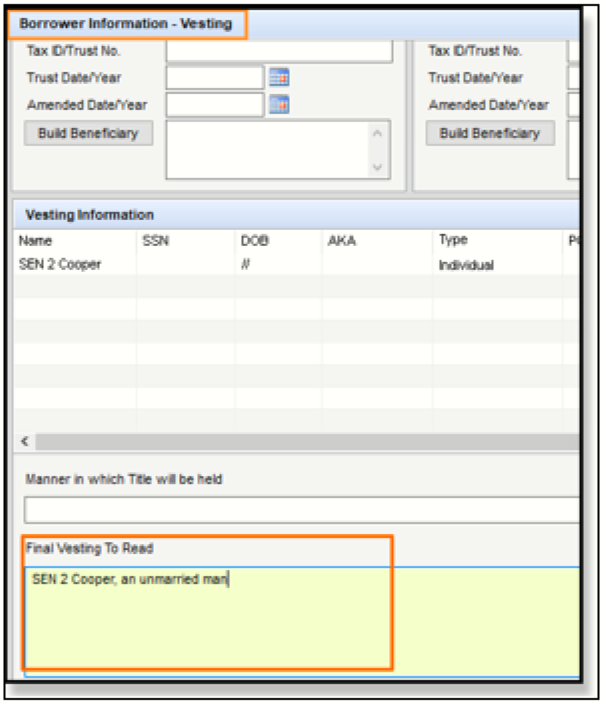
When Search Data has been sent. The Check for Updates popup will show **Search Data Saved** the first time Check for Updates is selected or automatically update when screen opens.

Note: This data will only be sent upon request.

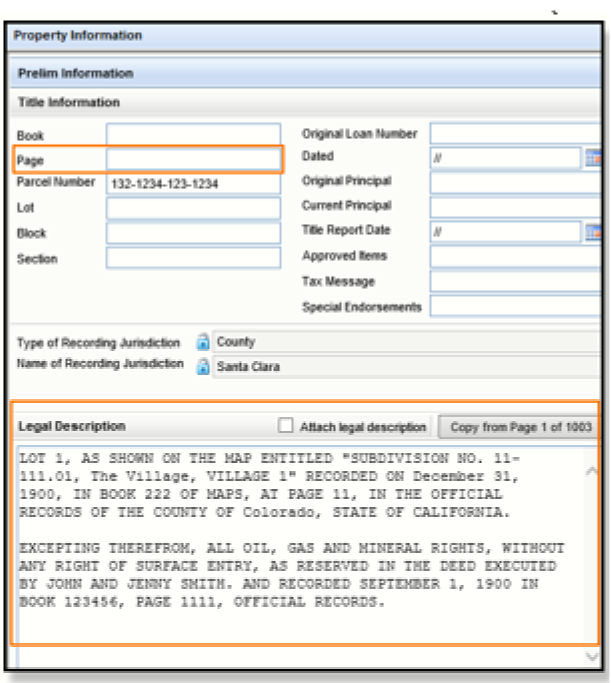


The Imported Search Data:

- **Final Vesting To Read – on form Borrower Information – Vesting**



- **Parcel Number -** on form **Property Information**
- **Legal Description** - on form **Property Information**



Canceling an Order

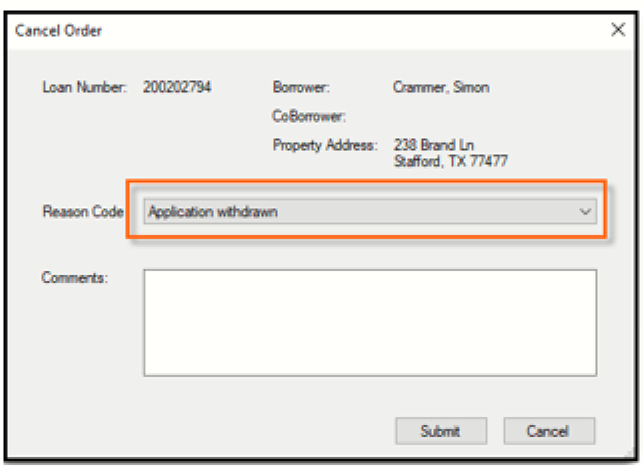
You can notify Stewart that an order was canceled from the *Stewart Title Company* plugin.

Note: You cannot cancel an order if **Loan Funded** displays in the *Status grid* of the *Status* tab. The **Cancel Order** button in this case is disabled.

Steps

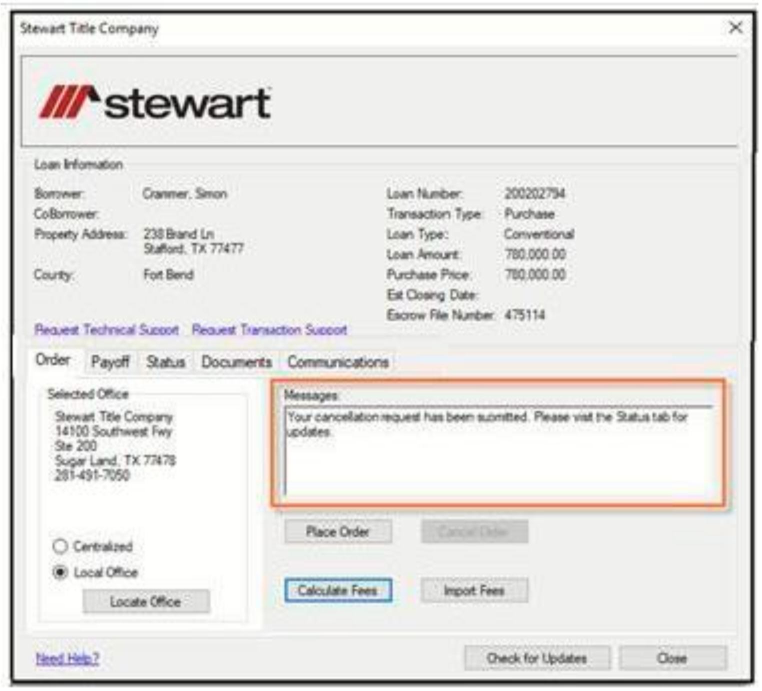
1. Log into the Stewart Title Company Plugin.
2. From the Order tab, click the **Cancel Order** button. A pop-up displays, asking if you are sure you want to cancel the order.

3. Click **Yes** to cancel the order. The *Cancel Order* screen displays.
4. From the *Cancel Order* screen, click the **Reason Code** drop-down to select the reason for cancelling the order.



Note: If **Other** is selected as a *Reason Code*, you are required to enter a comment in the **Comments** text box to explain the reason for cancelling the order. If you attempt to submit the cancellation without entering in comments, a pop-up displays, stating that this action is required

5. Click the Submit button. The *Messages* text box updates with a confirmation that the order was cancelled.



6. To verify the cancellation, click the **Check Status** button from the *Status tab*. The status **Order Cancelled** and **Completed Date** verify the action, date and time the order was cancelled. The cancelled status also displays within Stewart's system.

Note: When an order is canceled, the **Calculate Fees** and **Import Fees** buttons are disabled.

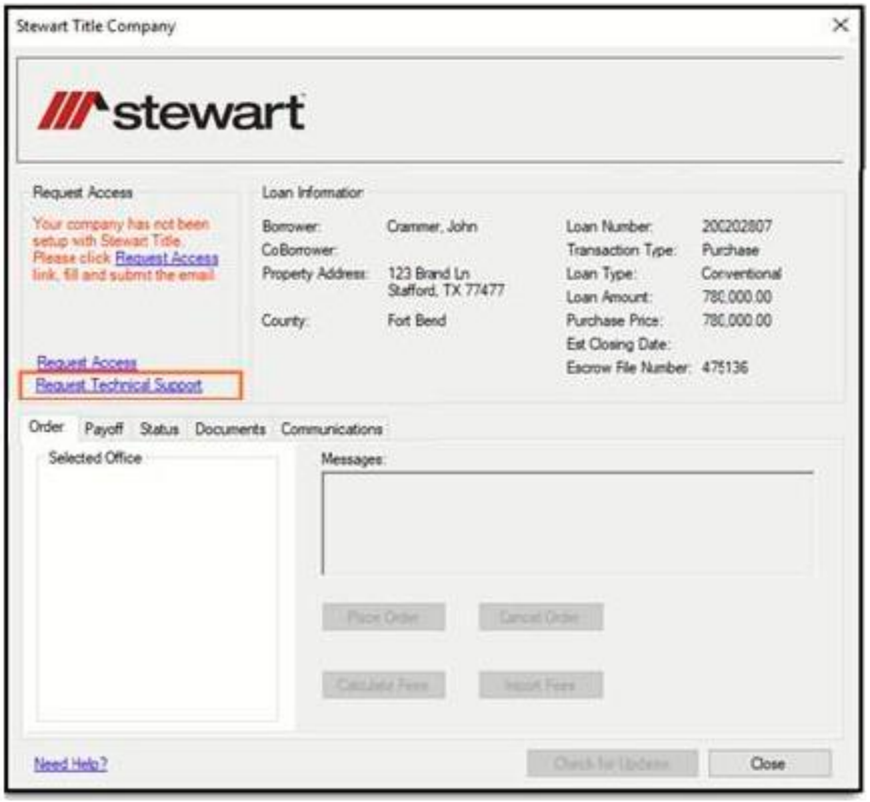
Request Technical Support

For technical or transactional support click the links within the *Stewart Title Company Plugin* for assistance.

Note: A Desktop Email Client application such as Microsoft Outlook must be installed to use the **Request Technical Support** and **Request Transaction Support** links. Otherwise, please contact Stewart Customer Care for assistance at 1.877.800.3132 or CustomerCare@stewart.com.

Request Technical Support

Click the Request Technical Support link to access *Stewart Customer Care* via email for technical support questions. Technical Support can assist with questions regarding login and password information.



Appendix: Suggested URL and Ports

For Network Administrators Only

Some users have experienced errors when logging into the *Stewart Title Company Plugin*. This may be caused by their Company's network blocking certain external websites. The below information can be communicated to your Network Administrator.

Please make sure the following URL and ports are whitelisted for best performance of the *Stewart Title Company Plugin*:

URL Endpoint:

- https://esb.stewart.com/AuthenticateEPIUser
- https://esb.stewart.com/api/ContractInfo
- https://esb.stewart.com/api/EncompassStatusList
- https://esb.stewart.com/api/getDocTypes
- https://esb.stewart.com/api/TitleOrderRequest
- https://esb.stewart.com/api/TitleOrderNotes
- https://esb.stewart.com/api/TitleOrderStatus
- https://esb.stewart.com/api/TitleOrderDocuments
- https://esb.stewart.com/api/TitleOrderCancel

Hostname:

- esb.stewart.com

Port:

- TCP/443 (HTTPS)

Note: The use of HTTPS Proxy and MIT SSL Traffic Sniffing can affect the performance of the plugin and cause issues to login. Please make sure that no redirection is been done to the URL endpoint mentioned above