



Stewart Title Company
Encompass Plugin
User Guide
July 1, 2023



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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.

The screenshot displays the Stewart Title Company plugin window. At the top is the Stewart logo. Below it, the 'Loan Information' section lists details for a loan: Borrower (Cooper, 98824), CoBorrower, Property Address (2356 James George, WA 98824), County (Grant), Loan Number (200202864), Transaction Type (NoCash-Out Refinance), Loan Type (Conventional), Loan Amount (400,000.00), Purchase Price (0.00), Est Closing Date (09/02/2020), and Escrow File Number. Below this are links for 'Request Technical Support' and 'Request Transaction Support'. The 'Order' tab is selected, showing a 'Selected Office' section with the address: Stewart Centralized Title Services, 500 North Broadway, Suite 900, St. Louis, MO 63102, 844-573-5082. There are radio buttons for 'Centralized' (selected) and 'Local Office', with a 'Locate Office' button. To the right, there is a 'Messages' text area and buttons for 'Place Order', 'Cancel Order', 'Calculate Fees', and 'Import Fees'. At the bottom, there are links for 'Need Help?', a 'Check for Updates' button, and a 'Close' button.

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**.

The screenshot shows the Stewart Title Company web application interface. At the top, there's a logo and a navigation bar. Below that, the 'Loan Information' section displays details for a loan with Loan Number 200202864. The borrower is Cooper, 98824, and the property is at 2356 James George, WA 98824. The loan type is Conventional, and the loan amount is 400,000.00. The purchase price is 0.00, and the estimated closing date is 09/02/2020. The escrow file number is also provided. Below the loan information, there are links for 'Request Technical Support' and 'Request Transaction Support'. The 'Order' tab is selected, showing the 'Payoff' status. The 'Selected Office' is Stewart Centralized Title Services, 500 North Broadway, Suite 900, St. Louis, MO 63102, with phone number 844-573-5082. There are radio buttons for 'Centralized' (selected) and 'Local Office'. Below these are buttons for 'Place Order', 'Cancel Order', 'Calculate Fees', and 'Import Fees'. At the bottom, there are links for 'Need Help?' and 'Check for Updates', and a 'Close' button.

Stewart Title Company

stewart

Loan Information

Borrower: Cooper, 98824
CoBorrower:
Property Address: 2356 James George, WA 98824
County: Grant

Loan Number: 200202864
Transaction Type: NoCash-Out Refinance
Loan Type: Conventional
Loan Amount: 400,000.00
Purchase Price: 0.00
Est Closing Date: 09/02/2020
Escrow File Number:

[Request Technical Support](#) [Request Transaction Support](#)

Order Payoff Status Documents Communications

Selected Office
Stewart Centralized Title Services
500 North Broadway
Suite 900
St. Louis, MO 63102
844-573-5082

☒ Centralized
☐ Local Office
[Locate Office](#)

Messages:

[Place Order](#) [Cancel Order](#)
[Calculate Fees](#) [Import Fees](#)

[Need Help?](#) [Check for Updates](#) [Close](#)

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**.

The screenshot shows the 'Select Fees to Import' dialog box. It contains a table with columns for 'HUD Line #', 'Fee Description', 'Buyer Amount', and 'Seller Amount'. The table lists several fees, including Lender's Policy, CLTA 110.9-06 Environmental Protection Lien, CLTA 100.12-06 CCR - Right of Reversion, CLTA 100.29-06 Mineral, Surface Damage, Closing Fee, Title Courier Fee, Title Document Preparation Fee, Title Signing Agent Fee, and Title Wire Transfer Fee. The 'Buyer Amount' and 'Seller Amount' columns show the respective fee amounts. Below the table, there are two checkboxes: 'Add Stewart Rate Quote document to the eFolder' and 'Add Stewart office to the Settlement Service Provider List'. At the bottom, there are buttons for 'Import Selected Fees' and 'Close'.

Select Fees to Import

<input checked="" type="checkbox"/>	HUD Line #	Fee Description	Buyer Amount	Seller Amount
<input checked="" type="checkbox"/>	1104	Lender's Policy	\$1,077.00	\$0.00
<input checked="" type="checkbox"/>	1110	CLTA 110.9-06 Environmental Protection Lien	\$25.00	\$0.00
<input checked="" type="checkbox"/>	1111	CLTA 100.12-06 CCR - Right of Reversion	\$25.00	\$0.00
<input checked="" type="checkbox"/>	1112	CLTA 100.29-06 Mineral, Surface Damage	\$108.00	\$0.00
<input checked="" type="checkbox"/>	1102	Closing Fee	\$400.00	\$0.00
<input checked="" type="checkbox"/>	1102	Title Courier Fee	\$20.00	\$0.00
<input checked="" type="checkbox"/>	1102	Title Document Preparation Fee	\$50.00	\$0.00
<input checked="" type="checkbox"/>	1102	Title Signing Agent Fee	\$175.00	\$0.00
<input checked="" type="checkbox"/>	1102	Title Wire Transfer Fee	\$17.00	\$0.00

☒ Add Stewart Rate Quote document to the eFolder
☒ Add Stewart office to the Settlement Service Provider List

[Import Selected Fees](#) [Close](#)

Display Endorsements Total on One Line

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

<input checked="" type="checkbox"/>	HUD Line #	Fee Description	Buyer Amount	Seller Amount
<input checked="" type="checkbox"/>	1104	Lender's Policy	\$1,077.00	\$0.00
<input checked="" type="checkbox"/>	1111	Lender's Endorsement(s)	\$208.00	\$0.00
<input checked="" type="checkbox"/>	1102	Closing Fee	\$400.00	\$0.00
<input checked="" type="checkbox"/>	1102	Title Courier Fee	\$20.00	\$0.00
<input checked="" type="checkbox"/>	1102	Title Document Preparation Fee	\$50.00	\$0.00
<input checked="" type="checkbox"/>	1102	Title Signing Agent Fee	\$175.00	\$0.00
<input checked="" type="checkbox"/>	1102	Title Wire Transfer Fee	\$17.00	\$0.00
<input checked="" type="checkbox"/>	1202	Mortgage - Recording Fees	\$172.00	\$0.00
<input checked="" type="checkbox"/>	1202	Release - Recording Fees	\$106.00	\$0.00

☒ Add Stewart Rate Quote document to the eFolder
☒ Add Stewart office to the Settlement Service Provider List

Import Selected Fees Close

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.

Alt	Fo	Name	Description	For Borrower Pair	Type	Access	For Milestone	Status	Date
		Title Quote.pdf		98824 Cooper	Settlement Service	AC, CL, FN, LD,...	Processing	Received	02/18/20
		Title Quote.pdf		98824 Cooper	Settlement Service	AC, CL, FN, LD,...	Processing	Received	02/18/20
		Title Report		98824 Cooper	Settlement Service	AC, CL, FN, LD,...	Processing	Received	02/18/20

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*).

The screenshot shows the 'Settlement Service Provider List' window. The 'Settlement Service Provider' details are for Stewart Title of California, Inc. The 'Fees' table is highlighted with an orange box:

Lines	Fee Description	Amount
1	Closing Fee	400.00
2	Title Counter Fee	20.00
3	Title Document Preparation Fee	50.00
4	Title Signing Agent Fee	175.00
5	Title Wire Transfer Fee	17.00
6	CLTA 110 9-06 Environmental Protection Lien	25.00
7	CLTA 100 12-06 CCR - Right of Reversion	25.00
8	CLTA 100 29-06 Mineral, Surface Damage	100.00
9		
10		

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.

The screenshot shows the 'Settlement Service Provider List' window with the 'Amount' column hidden in the 'Fees' table, highlighted with an orange box:

Lines	Fee Description	Amount
1	Closing Fee	
2	Title Counter Fee	
3	Title Document Preparation Fee	
4	Title Signing Agent Fee	
5	Title Wire Transfer Fee	
6	CLTA 110 9-06 Environmental Protection Lien	
7	CLTA 100 12-06 CCR - Right of Reversion	
8	CLTA 100 29-06 Mineral, Surface Damage	
9		
10		

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.

The screenshot displays the 'Settlement Service Provider List' interface. The top header shows loan details for '2356 James Campbell, CA 95008' with a loan amount of '\$400,000.00'. The main content area has two tabs: 'Settlement Service Provider List' and 'Settlement Service Provider Details'. The 'Settlement Service Provider List' tab is active, showing a table with one entry for 'Title Insurance' by 'Stewart Title of California, Inc.' in 'Campbell, CA'. The 'Settlement Service Provider Details' tab is also visible, showing fields for company name, address, contact information, and a list of fees.

Service Category	Company Name	Address	City	State
1 Title Insurance	Stewart Title of California, Inc.	901 Campisi Way Ste 100	Campbell	CA

Line#	Fee Description	Amount
1	Closing Fee	400.00
2	Title Courier Fee	20.00
3	Title Document Preparation Fee	50.00
4	Title Signing Agent Fee	175.00
5	Title Wire Transfer Fee	17.00
6	CLTA 110 9-06 Environmental Protection Lien	25.00
7	CLTA 100 12-06 CCR - Right of Reversion	25.00
8	CLTA 100 29-06 Mineral, Surface Damage	108.00
9		
10		

Option to Remove the .PDF file extension from Stewart documents

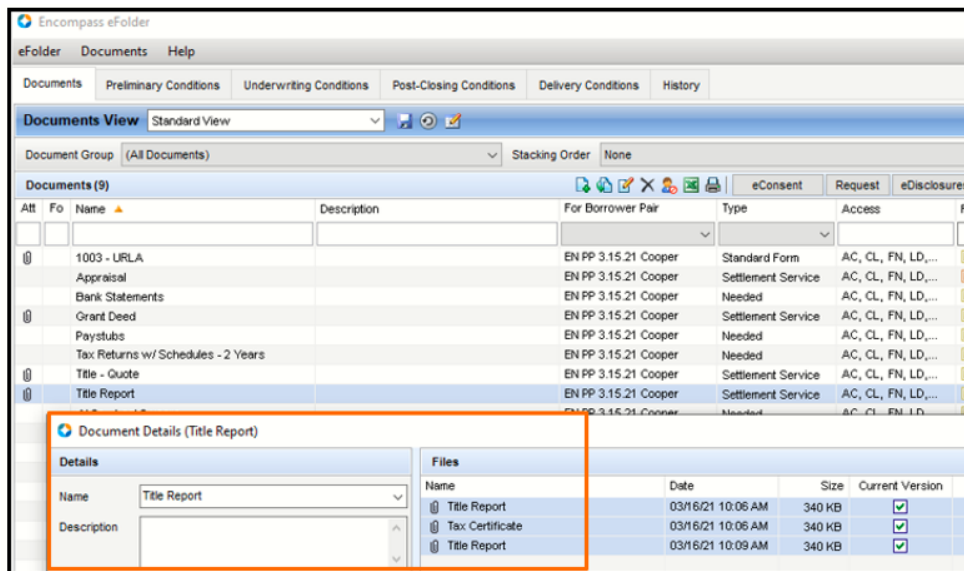
When documents are imported from Stewart, the file extension can be removed.

The screenshot displays the 'Document Details (Title Report)' interface. The 'Details' section shows the document name as 'Title Report'. The 'Files' section shows a list of files, including 'Title Report' with a date of '03/25/21 12:51 PM'.

Name	Date
Title Report	03/25/21 12:51 PM

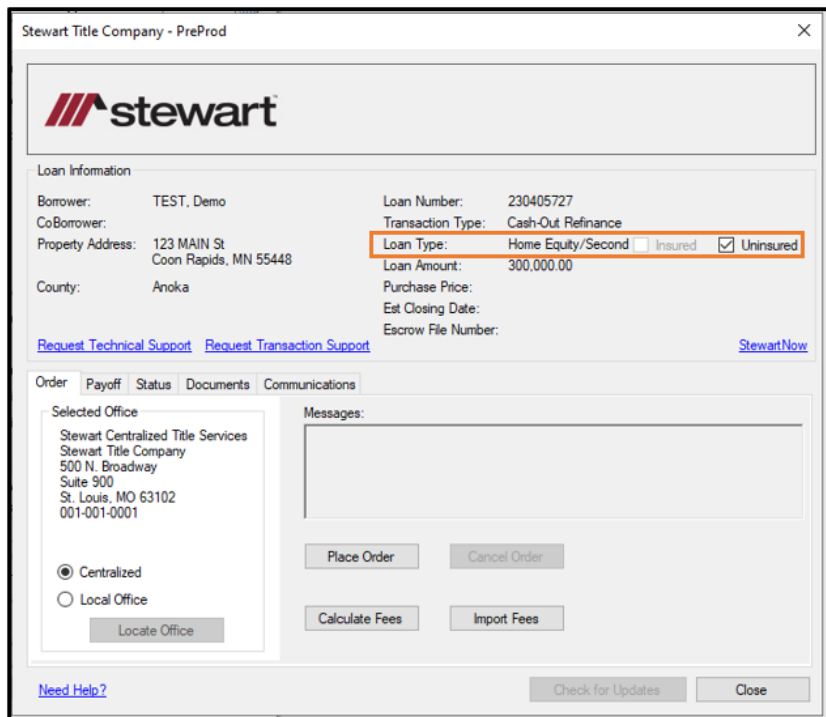
Option to Specify a Folder/Placeholder for Imported Documents

Imported documents can be placed 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.

1102. Settlement or Closing Fees

Fee	To	Amount	
Settlement Fee			
Closing Fee	Stewart Centralized Title	0.00	
Escrow Fee			
Courier Fee	Stewart Centralized Title	20.00	
Document Preparation Fee	Stewart Centralized Title	50.00	
Loan Service Fee(Sale W	Stewart Centralized Title	325.00	
Signing Agent Fee	Stewart Centralized Title	200.00	
Wire Transfer Fee	Stewart Centralized Title	0.00	
1103. Owner's Title Insurance	Stewart Centralized Title Se	0.00	
1104. Lender's Title Insurance	Stewart Centralized Title Se	1,700.00	
1105. Lender's Title Policy Limit			

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

Select Fees to Import

<input checked="" type="checkbox"/>	HUD Line #	Fee Description	Buyer Amount	Seller Amount
<input checked="" type="checkbox"/>	1104	Lender's Policy	\$1,077.00	\$0.00
<input checked="" type="checkbox"/>	1110	CLTA 110.9-06 Environmental Protection Lien	\$25.00	\$0.00
<input checked="" type="checkbox"/>	1202	Mortgage - Recording Fees	\$172.00	\$0.00
<input checked="" type="checkbox"/>	1202	Release - Recording Fees	\$106.00	\$0.00

☐ Add Fees to 2015 Itemization Form

☒ Add Stewart Rate Quote document to the eFolder

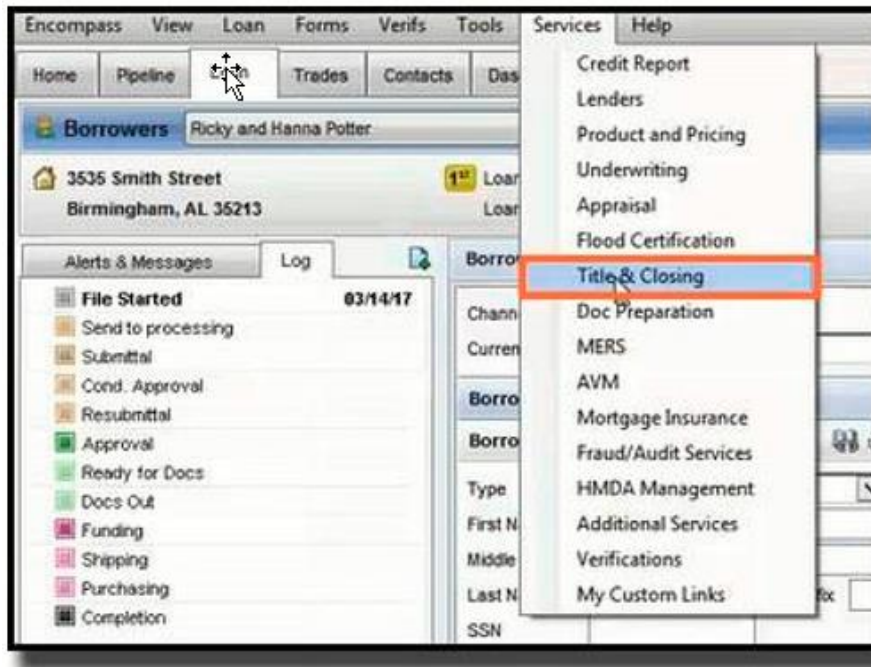
☒ Add Stewart office to the Settlement Service Provider List

Import Selected Fees Close

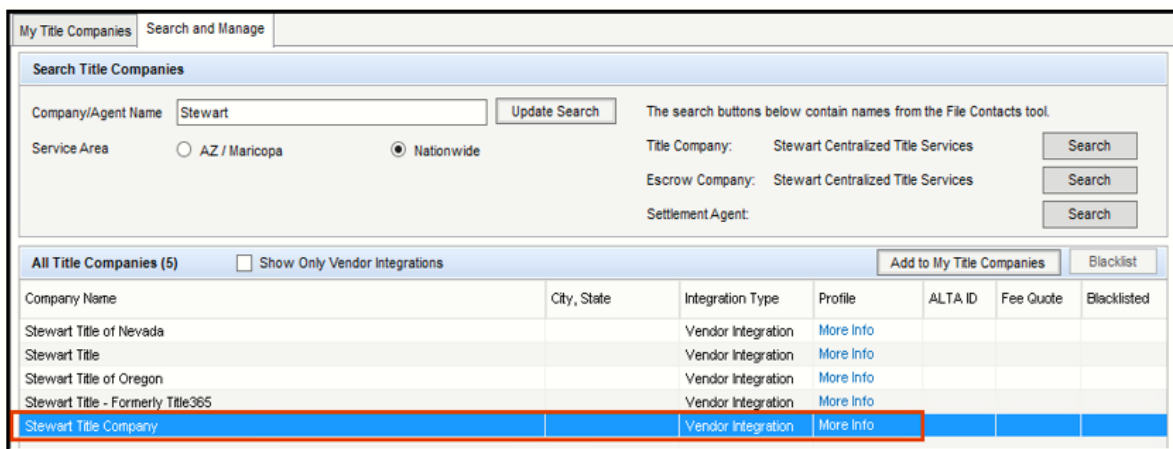
Launching the Plugin

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 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

The screenshot shows the Stewart Title Company interface. The 'Order' tab is selected and highlighted with an orange box. The interface displays loan information for a borrower named Cooper, 98824. The loan number is 200202864, and the transaction type is NoCash-Out Refinance. The loan type is Conventional, with a loan amount of 400,000.00. The purchase price is 0.00, and the estimated closing date is 09/02/2020. The escrow file number is also displayed. Below the loan information, there are links for 'Request Technical Support' and 'Request Transaction Support'. The 'Order' tab is selected, showing the 'Selected Office' as Stewart Centralized Title Services, 500 North Broadway, Suite 900, St. Louis, MO 63102, 844-573-5082. There are radio buttons for 'Centralized' (selected) and 'Local Office'. Below these are buttons for 'Place Order', 'Cancel Order', 'Calculate Fees', and 'Import Fees'. At the bottom, there are links for 'Need Help?' and 'Check for Updates', and a 'Close' button.

Loan Information	
Borrower:	Cooper, 98824
CoBorrower:	
Property Address:	2356 James George, WA 98824
County:	Grant
Loan Number:	200202864
Transaction Type:	NoCash-Out Refinance
Loan Type:	Conventional
Loan Amount:	400,000.00
Purchase Price:	0.00
Est Closing Date:	09/02/2020
Escrow File Number:	

[Request Technical Support](#) [Request Transaction Support](#)

Order Payoff Status Documents Communications

Selected Office
Stewart Centralized Title Services
500 North Broadway
Suite 900
St. Louis, MO 63102
844-573-5082

☒ Centralized
☐ Local Office
[Locate Office](#)

Messages:

[Place Order](#) [Cancel Order](#)
[Calculate Fees](#) [Import Fees](#)

[Need Help?](#) [Check for Updates](#) [Close](#)

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.

The screenshot shows the Stewart Title Company interface. The 'Request Access' button is highlighted with an orange box. The interface displays loan information for a borrower named Cramer, John. The loan number is 200202807, and the transaction type is Purchase. The loan type is Conventional, with a loan amount of 780,000.00. The purchase price is 780,000.00, and the estimated closing date is 09/02/2020. The escrow file number is 475136. Below the loan information, there are links for 'Request Access' and 'Request Technical Support'. The 'Request Access' button is highlighted with an orange box. Below the loan information, there are radio buttons for 'Centralized' (selected) and 'Local Office'. Below these are buttons for 'Place Order', 'Cancel Order', 'Calculate Fees', and 'Import Fees'. At the bottom, there are links for 'Need Help?' and 'Check for Updates', and a 'Close' button.

Loan Information	
Borrower:	Cramer, John
CoBorrower:	
Property Address:	123 Brand Ln Stafford, TX 77477
County:	Fort Bend
Loan Number:	200202807
Transaction Type:	Purchase
Loan Type:	Conventional
Loan Amount:	780,000.00
Purchase Price:	780,000.00
Est Closing Date:	09/02/2020
Escrow File Number:	475136

[Request Access](#) [Request Technical Support](#)

Request Access
Your company has not been setup with Stewart Title. Please click [Request Access](#) link, fill and submit the email.

[Request Access](#) [Request Technical Support](#)

Order Payoff Status Documents **Communications**

Selected Office

Messages:

[Place Order](#) [Cancel Order](#)
[Calculate Fees](#) [Import Fees](#)

[Need Help?](#) [Check for Updates](#) [Close](#)

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.

The screenshot shows the Stewart Title Company web application interface. At the top is the Stewart logo. Below it, the 'Loan Information' section displays details for a borrower named Cooper, 98824, with a loan number of 200202864. The transaction type is 'NoCash-Out Refinance', the loan type is 'Conventional', and the loan amount is \$400,000.00. The property address is 2356 James George, WA 98824, and the county is Grant. The purchase price is \$0.00, the estimated closing date is 09/02/2020, and the escrow file number is blank. Below the loan information are links for 'Request Technical Support' and 'Request Transaction Support'. The 'Order' tab is selected, showing a 'Selected Office' section with 'Stewart Centralized Title Services' at 500 North Broadway, Suite 900, St. Louis, MO 63102, and phone number 844-573-5082. There are two radio buttons: 'Centralized' (selected) and 'Local Office'. A 'Locate Office' button is next to the 'Local Office' option. To the right of the 'Selected Office' section is a 'Messages' text area. Below the messages are buttons for 'Place Order', 'Cancel Order', 'Calculate Fees', and 'Import Fees'. At the bottom of the interface are links for 'Need Help?', a 'Check for Updates' button, and a 'Close' button.

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.

Stewart Title Company

Loan Information
 Borrower: Cooper, 98824
 CoBorrower: 2356 James, Grant, WA 98824
 Property Address: 2356 James, Grant, WA 98824
 County: Grant

Locate an Office
 Search By:
☐ Property Address
☐ Address
☒ Zip Code: 98824
 City: _____
 State: _____
 County: Grant
 Distance (miles): 50 Find Offices

Company	Address	City	State	Phone	Distance
Stewart Title Company	117 E 4th Ave	Moore Lake	WA	509-755-3423	27.39

Selected Office: _____

Centralized ☐ Local Office ☒ Locate Office

Need Help?

Order Approval Order Escrow Contributions

Select Office Cancel

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

Stewart Title Company

Loan Information
 Borrower: Cooper, 98824
 CoBorrower: 2356 James, Grant, WA 98824
 Property Address: 2356 James, Grant, WA 98824
 County: Grant

Loan Number: 200202864
 Transaction Type: NoCash-Out Refinance
 Loan Type: Conventional
 Loan Amount: 400,000.00
 Purchase Price: 0.00
 Est Closing Date: 09/02/2020
 Escrow File Number: _____

Request Technical Support Request Transaction Support

Order Payoff Status Documents Communications

Selected Office
 Stewart Title Company
 335 Basin St SW
 Ephrata, WA 98823
 509-754-2248

Centralized ☐ Local Office ☒ Locate Office

Messages: _____

Place Order Cancel Order
 Calculate Fees Import Fees

Need Help? Check for Updates Close

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.

Category/Role	Disc. on CD	Company	Name	Work Phone
1 Borrower			Duplicate documents Demo C	
2 Co-Borrower				
3 Role - File Starter			Lynn Ramsey	123-111-1111
4 Role - Loan Officer (Proces				
5 Role - Loan Processor (Sub				
6 Role - Underwriter (Cond. A				
7 Role - Closer (Docs Out)				
8 Role - Funder (Funding)				
9 Role - Post Closer (Purchas				
10 Role - Lock Desk				
11 Role - Accounting				
12 Lender				
13 Appraiser				
14 Escrow Company		Stewart Centralized Title Services		844-573-5082
15 Title Insurance Company		Stewart Centralized Title Services		844-573-5082

Escrow Company Copy to Settle

Company Name	Stewart Centralized Title Service	Officer Name	
Address	500 North Broadway Suite 900	Officer Title	
City	St. Louis	Phone	844-573-5082
State	MO Zip 63102	Email	
Relationship		Fax	
Line Item Number		Cell	
Escrow Case #	UBFREF21186851	ABA Number	

Title Insurance Company Copy to St

Company Name	Stewart Centralized Title Service	Officer Name	
Address	500 North Broadway Suite 900	Officer Title	
City	St. Louis	Phone	844-573-5082
State	MO Zip 63102	Email	
Relationship		Fax	
Line Item Number		Cell	
Title Case #	UBFREF21186851	ABA Number	

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**.

The screenshot shows the Stewart Title Company web application interface. At the top is the Stewart logo. Below it is the 'Loan Information' section with fields for Borrower, CoBorrower, Property Address, County, Loan Number, Transaction Type, Loan Type, Loan Amount, Purchase Price, Est Closing Date, and Escrow File Number. Below this are links for 'Request Technical Support' and 'Request Transaction Support'. A tabbed interface shows 'Order' as the active tab, with other tabs being 'Payoff', 'Status', 'Documents', and 'Communications'. Under the 'Order' tab, there is a 'Selected Office' section with contact information for Stewart Title Company in Ephrata, WA. Below this are radio buttons for 'Centralized' and 'Local Office', with 'Local Office' selected. A 'Locate Office' button is also present. In the center, there is a 'Messages' text area. At the bottom of the main content area are four buttons: 'Place Order', 'Cancel Order', 'Calculate Fees' (which is highlighted with an orange border), and 'Import Fees'. At the very bottom of the window are links for 'Need Help?' and buttons for 'Check for Updates' and 'Close'.

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.

Stewart Rate Calculator

Home

Buyer Close Sheet | Seller Net Sheet | **Title & Escrow Fee Estimate**

Property Location: George, WA, Grant

Transaction Type: Refinance

Loan Amount: \$400,000.00

☐ Title Insurance Premium

☐ Endorsements/ Other Products [Select Products](#)

☐ Title Service Fees

☐ Recording Fees and Transfer Taxes [Select Fee and Tax Questions](#)

Create Estimate | **New Estimate**

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

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: Stewart Title Guaranty Company and its suppliers (collectively STGC) take reasonable measures to ensure the quality of the data and the other information made available on this web site. Nevertheless because of the possibility of human, computer, or mechanical error, whether by our sources or by others, STGC does not guarantee the accuracy, adequacy, or completeness of any information herein. STGC does not make any express or implied warranties with regard to the use of the Stewart Rate Calculator and shall not be responsible for any errors or omissions or for the results obtained from the use of such information. You should verify all information obtained from this web site. The charges set forth herein may vary and additional charges will be made when unusual conditions of title are encountered, when special risks are insured against, or when special services are requested.

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.

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:

Stewart Title Company - PreProd

Loan Information

Borrower: TEST, Demo
 CoBorrower:
 Property Address: 123 MAIN St
 Coon Rapids, MN 55448
 County: Anoka

Loan Number: 230405727
 Transaction Type: Cash-Out Refinance
 Loan Type: Home Equity/Second | Insured ☒ Uninsured ☐
 Loan Amount: 300,000.00
 Purchase Price:
 Est Closing Date:
 Escrow File Number:

[Request Technical Support](#) [Request Transaction Support](#) [StewartNow](#)

Order | Payoff | Status | Documents | Communications

Selected Office:
 Stewart Centralized Title Services
 Stewart Title Company
 500 N. Broadway
 Suite 300
 St. Louis, MO 63102
 001-001-0001

☒ Centralized
☐ Local Office
[Locate Office](#)

Messages:

[Place Order](#) [Cancel Order](#)
[Calculate Fees](#) [Import Fees](#)

[Need Help?](#) [Check for Updates](#) [Close](#)

- 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**

Loan Type

☐ Conv
☐ FHA
☐ VA
☐ USDA-RHS
☒ Other - Reverse
☐ HELOC

Lien Position

☐ First
☐ Subordinate
[Sub. Financing](#)

Lien Position

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

Stewart Title Company - PreProd

Loan Information

Borrower: Borrower, Mark
 CoBorrower:
 Property Address: 1700 12th St W
 Coon Rapids, MN 55443
 County: Anoka

Loan Number: 220705115
 Transaction Type: Cash-Out Refinance
 Loan Type: Other ☒ Reverse ☐
 Loan Amount: 100,000.00
 Purchase Price:
 Est Closing Date:
 Escrow File Number:

[Request Technical Support](#) [Request Transaction Support](#) [StewartNow](#)

Order | Payoff | Status | Documents | Communications

Selected Office:
 Stewart Centralized Title Services
 Stewart Title Company
 500 North Broadway
 Suite 300
 St. Louis, MO 63102
 844-573-5082

☒ Centralized
☐ Local Office
[Locate Office](#)

Messages:

[Place Order](#) [Cancel Order](#)
[Calculate Fees](#) [Import Fees](#)

[Need Help?](#) [Check for Updates](#) [Close](#)

- 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.

Stewart Title Company - PreProd

stewart

Loan Information

Borrower: Cooper, SEN 2 Loan Number: 210503989
 CoBorrower: Transaction Type: NoCash-Out Refinance
 Property Address: 985 Lancaster Loan Type: Conventional
 Los Gatos, CA 95030 Loan Amount: 950,000.00
 County: Santa Clara Purchase Price:
 Est Closing Date:
 Escrow File Number:

[Request Technical Support](#) [Request Transaction Support](#)

Order Payoff Status Documents Communications

Selected Office
 Stewart Centralized Title Services
 500 North Broadway
 Suite 900
 St. Louis, MO 63102
 844-573-5082

Messages:

Payoff available - Go to Payoff Tab to include w/Place Order

☒ Centralized
☐ Local Office

Place Order Cancel Order

Calculate Fees Import Fees

[Need Help?](#) [Check for Updates](#) Close

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**

Stewart Title Company - PreProd

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Loan Information

Borrower: Cooper, SEN 2 Loan Number: 210503989
 CoBorrower: Transaction Type: NoCash-Out Refinance
 Property Address: 985 Lancaster Loan Type: Conventional
 Los Gatos, CA 95030 Loan Amount: 950,000.00
 County: Santa Clara Purchase Price:
 Est Closing Date:
 Escrow File Number:

[Request Technical Support](#) [Request Transaction Support](#)

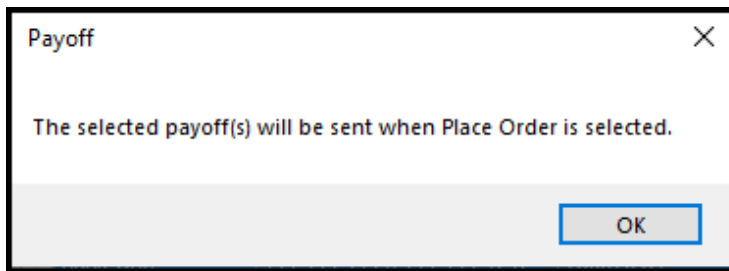
Order **Payoff** Status Documents Communications

Clear Payoff Send Payoff

Type	Lender Name	Lender Phone/Fax	Loan Amount	Loan Number
<input checked="" type="checkbox"/> Demand	Bank One	111-111-1111/111-111-1212	750076.34	458752692522
<input checked="" type="checkbox"/> Subordination	Bank Two	222-222-2222/222-222-2323	12298.78	57811874258

[Need Help?](#) [Check for Updates](#) Close

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.

The image shows the Stewart web application interface. At the top is the Stewart logo. Below it is a "Loan Information" section with fields for Borrower, CoBorrower, Property Address, County, Loan Number, Transaction Type, Loan Type, Loan Amount, Purchase Price, Est Closing Date, and Escrow File Number. Below this are links for "Request Technical Support" and "Request Transaction Support". The main section has tabs for "Order", "Payoff", "Status", "Documents", and "Communications". The "Order" tab is selected. It contains a "Selected Office" section with a list of office details and radio buttons for "Centralized" (selected) and "Local Office". Below this is a "Locate Office" button. To the right is a "Messages" section with a text box containing a message about processing the order. Below the messages are buttons for "Place Order", "Cancel Order", "Calculate Fees", and "Import Fees". At the bottom of the "Order" tab are buttons for "Check for Updates" and "Close". A "Need Help?" link is at the bottom left.

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.

The screenshot shows the Stewart Title Company web application. The 'Order' tab is selected. In the 'Messages' field, an error message is displayed: 'Order could not be placed. See the Communications tab for details. You can Cancel this Order, make updates, and try again. You may also contact Stewart Customer Care at (855)330-2800 for assistance.' The message is highlighted with a red box. Below the message are buttons for 'Place Order', 'Cancel Order', 'Calculate Fees', and 'Import Fees'. At the bottom, there are buttons for 'Need Help?', 'Check for Updates', and 'Close'.

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

The screenshot shows the Stewart Title Company web application with the 'Communications' tab selected. A message is displayed: 'Check for Updates Error. Seller is not a city found in MI.' The message is highlighted with a red box. Below the message is a 'View Message' button. A 'View Message' dialog box is open, showing the message details: 'Date: Saturday, February 15, 2020 8:25:27 PM', 'Sender: Stewart', 'Subject: Check for Updates Error', and 'Message: Seller is not a city found in MI.' The message is highlighted with a red box. At the bottom of the dialog box is a 'Close' button.

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

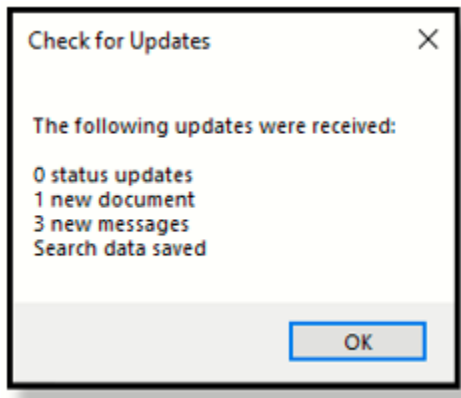
Orders initially opened by a directing third party, such as a realtor, can be linked by resubmitting the order through the *Stewart Title Company* plugin. Linking existing open orders provides all the benefits of integration on orders submitted directly by a realtor partner. Comments can be included 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

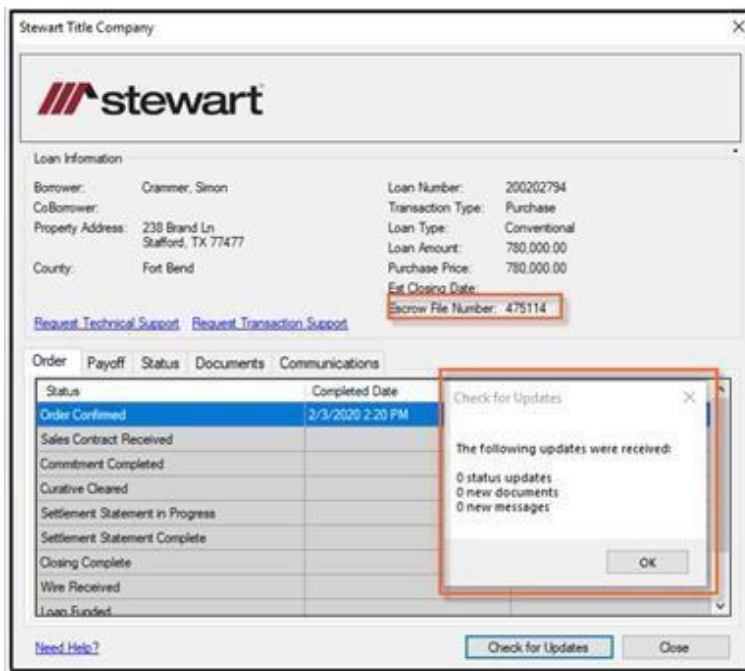
Use the *Status* tab to check the current status of a submitted order. Below is a list that defines each column in the Status grid:

- **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.

Stewart Title Company

stewart

Loan Information

Borrower:	Cramer, Simon	Loan Number:	200202794
CoBorrower:		Transaction Type:	Purchase
Property Address:	238 Brand Ln Stafford, TX 77477	Loan Type:	Conventional
County:	Fort Bend	Loan Amount:	780,000.00
		Purchase Price:	780,000.00
		Est Closing Date:	
		Escrow File Number:	475114

[Request Technical Support](#) [Request Transaction Support](#)

Order Payoff Status Documents Communications

Status	Completed Date	Updated Date
Order Confirmed	2/3/2020 2:20 PM	
Sales Contract Received		
Commitment Completed		
Curative Cleared		
Settlement Statement in Progress		
Settlement Statement Complete		
Closing Complete		
Wire Received		
Loan Funded		

[Need Help?](#) Check for Updates Close

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

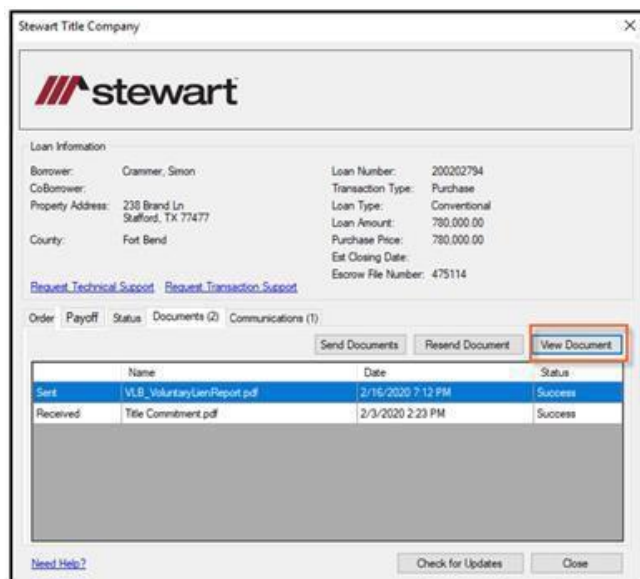
Documents display in the *Documents* grid. The documents received are saved and available in the *E-folder*, which tracks document-related activities.

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*.

The screenshot shows a window titled "Document Details (Title Commitment.pdf)". The window is divided into two main sections: "Details" on the left and "Files" on the right. The "Details" section contains several fields: "Name" (Title Commitment.pdf), "Description" (empty), "For Borrower Pair" (Simon Crammer), "For Milestone" (Processing), "Access" (OO), "Conditions" (empty), "ATR/QM" (empty), "Doc Groups" (empty), and "Available" (checked for WebCenter, TPO, and EDM Lenders). The "Files" section shows a table with columns "Name" and "Date". Below the "Details" section is a "Tracking" section with "Status" and "Comments" tabs. A "Close" button is located at the bottom right of the window.

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 a file.

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.

<input type="checkbox"/>	Folder	File Name	Date
<input checked="" type="checkbox"/>	Grant Deed	Deed of Trust.pdf	3/16/2021 10:11 AM
<input type="checkbox"/>	Grant Deed	Deed.pdf	3/16/2021 10:11 AM
<input type="checkbox"/>	Grant Deed	Grant Deed	3/16/2021 10:11 AM
<input type="checkbox"/>	1003 - URLA	Loan Application.pdf	
<input type="checkbox"/>	Grant Deed	Power of Attorney.pdf	3/16/2021 10:11 AM
<input type="checkbox"/>	Title Report	Tax Certificate	3/15/2021
<input type="checkbox"/>	Title - Quote	Title - Quote	3/16/2021 10:28 AM
<input type="checkbox"/>	Title Report	Title Report	3/15/2021
<input type="checkbox"/>	Title Report	Title Report	3/15/2021

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

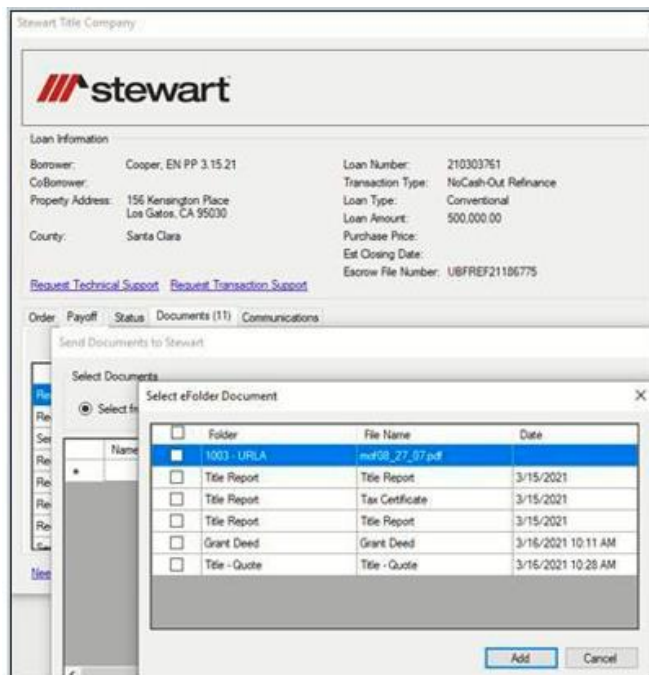
<input type="checkbox"/>	Folder	File Name	Date
<input checked="" type="checkbox"/>	Grant Deed	Deed of Trust.pdf	3/16/2021 10:11 AM
<input type="checkbox"/>	Grant Deed	Deed.pdf	3/16/2021 10:11 AM
<input type="checkbox"/>	Grant Deed	Grant Deed	3/16/2021 10:11 AM

- From the *Typed*-drop-down, select the **Document Type**. This field is required.

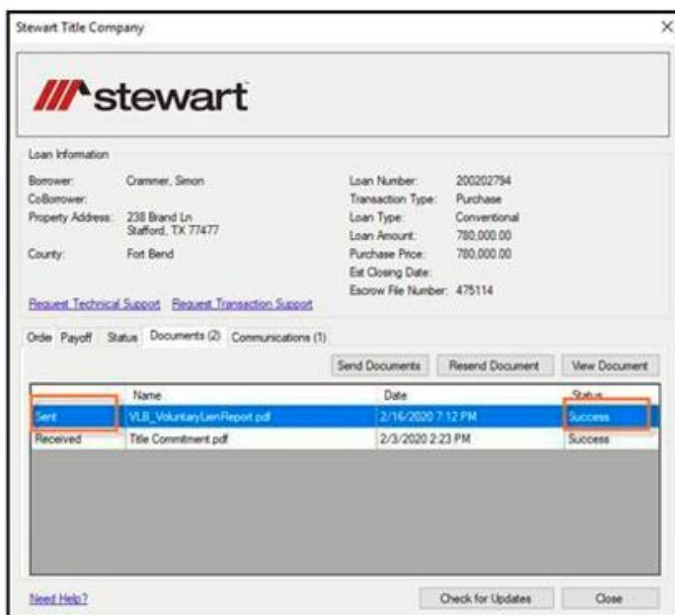
Name	Type	Description
Binder2.pdf		

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

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



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

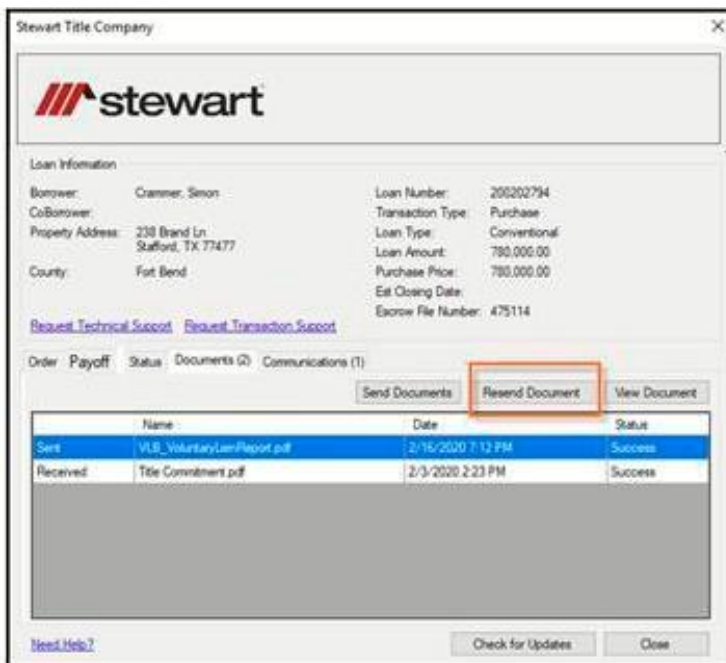


Resending Documents

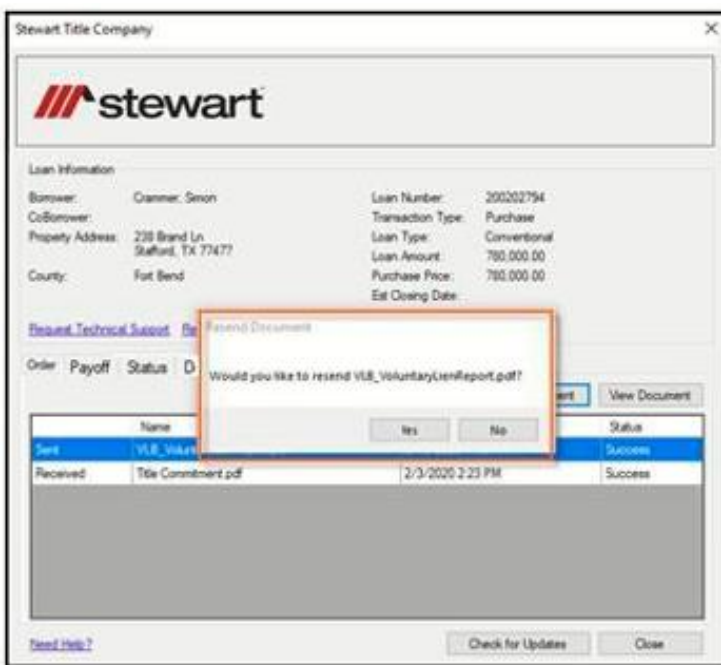
You can also resend documents from the *Stewart Title Company Plugin*.

Steps

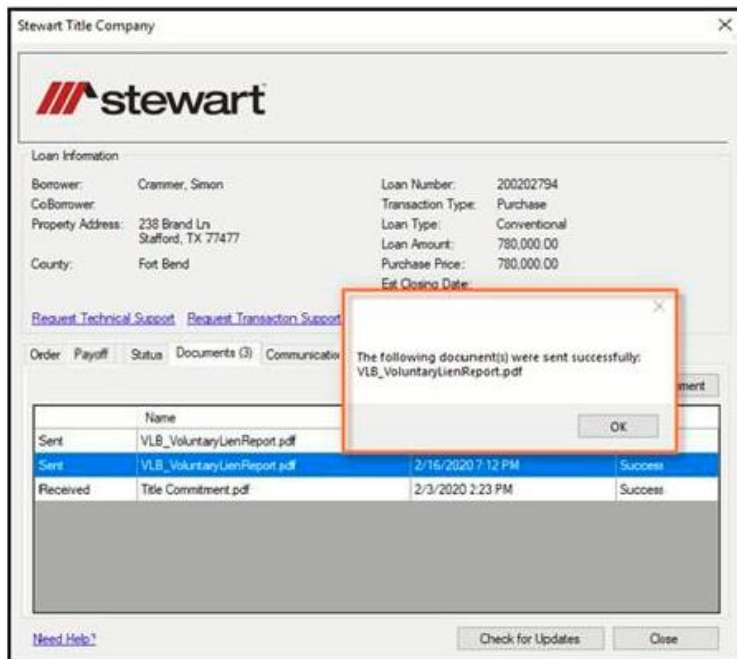
- From the **Documents** tab, select the **Document Type** from the drop-down. You will see that the Document Type name also populates the *Description* field. The Description field is editable.
- Click the **Resend Documents** button.



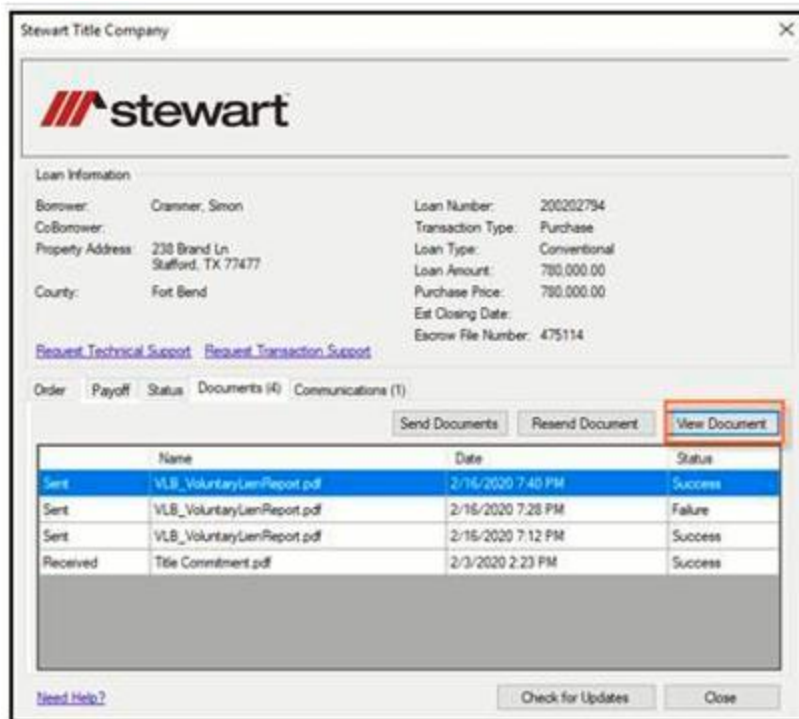
3. A pop-up displays, requesting to confirm that the document should be resent. Click **Yes** to continue.



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



- 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.

Stewart Title Company



Loan Information

Borrower: Cramer, Simon

CoBorrower:

Property Address: 238 Brand Ln
Stafford, TX 77477

County: Fort Bend

Loan Number: 200202794

Transaction Type: Purchase

Loan Type: Conventional

Loan Amount: 780,000.00

Purchase Price: 780,000.00

Est Closing Date:

Escrow File Number: 475114

[Request Technical Support](#) [Request Transaction Support](#)

Order Payoff Status Documents (4) Communications (1)

Send Documents Resend Document View Document

	Name	Date	Status
Sent	VLB_VoluntaryLienReport.pdf	2/16/2020 7:40 PM	Success
Sent	VLB_VoluntaryLienReport.pdf	2/16/2020 7:28 PM	Failure
Sent	VLB_VoluntaryLienReport.pdf	2/16/2020 7:12 PM	Success
Received	Title Commitment.pdf	2/3/2020 2:23 PM	Success

[Need Help?](#)

Check for Updates

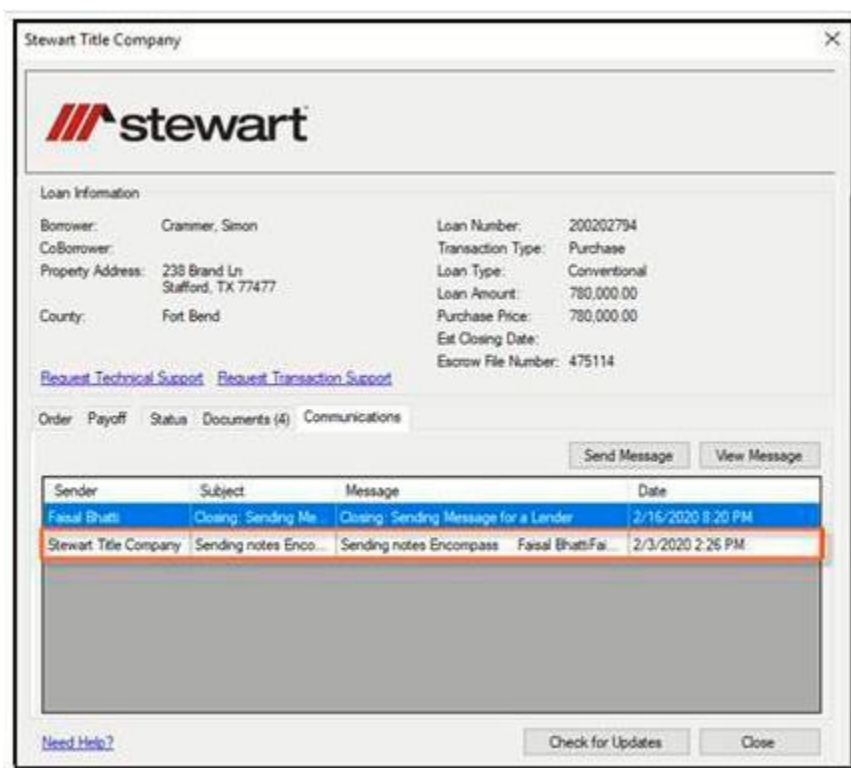
Close

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.



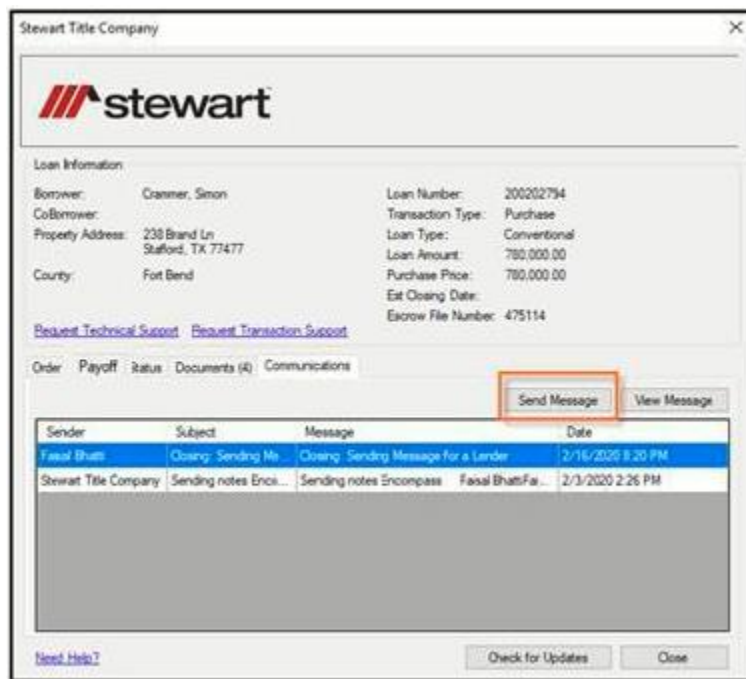
Note: To use the *Communications* tab, the Lender must first successfully submit an order request via the plugin.

Sending a Communication to a Title Office

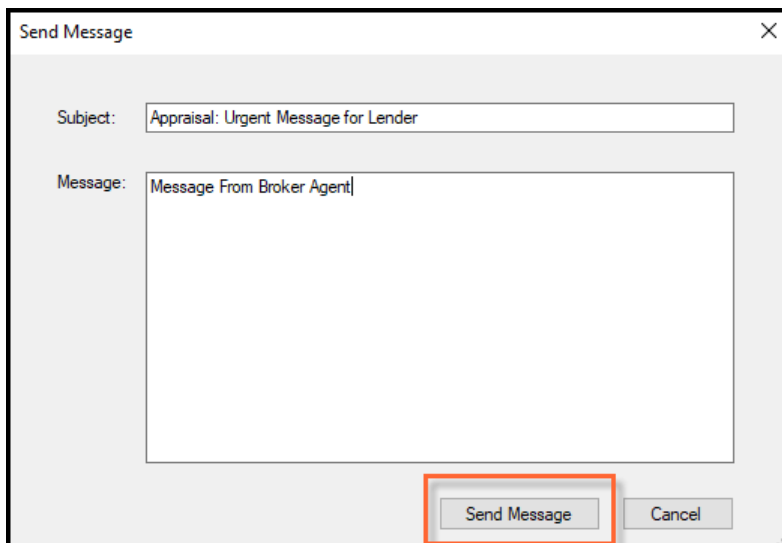
Both sent and incoming messages display in the Communications grid of the *Communications* tab. Follow the steps below to send a message to an Escrow Office from the *Stewart Title Company Plugin*.

Steps

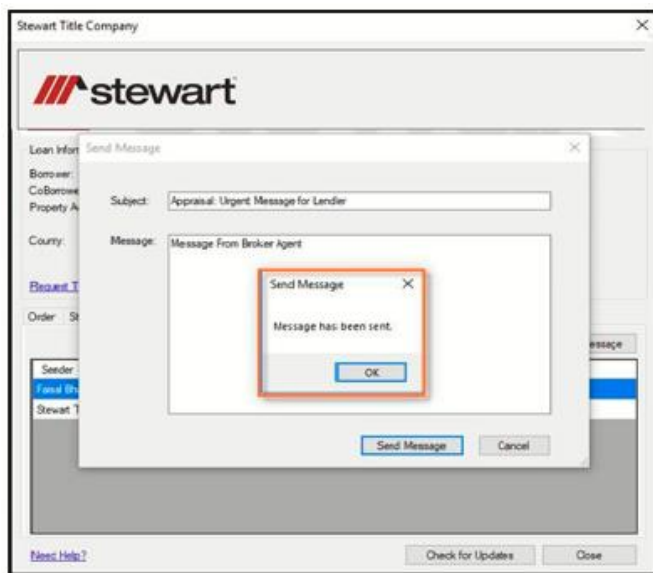
1. From the *Communications* tab, click **Send Message**. The *Send Message* pop-up displays.



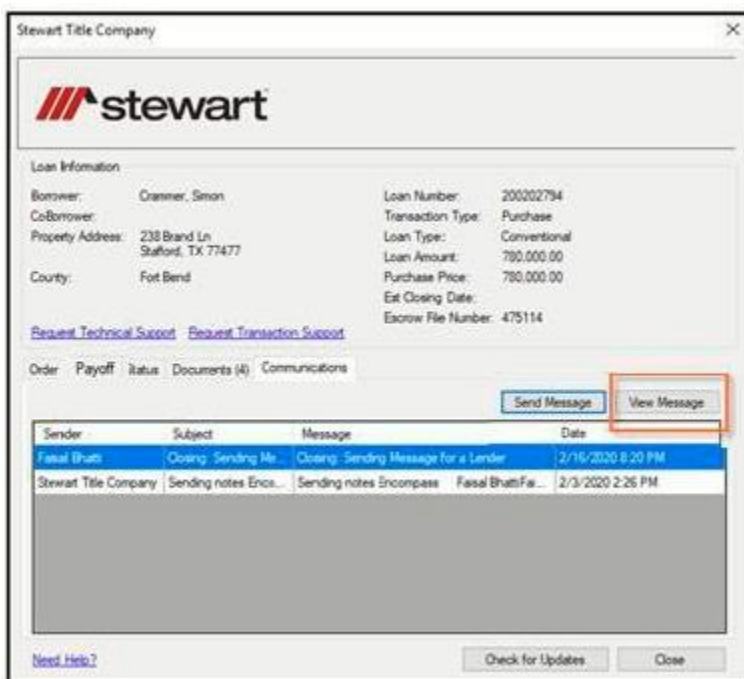
- From the *Send Message* pop-up, enter the Subject and the body of the Message.
- Click the **Send Message** button at the bottom of the pop-up. Another pop-up displays, confirming the Message has been sent.



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



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

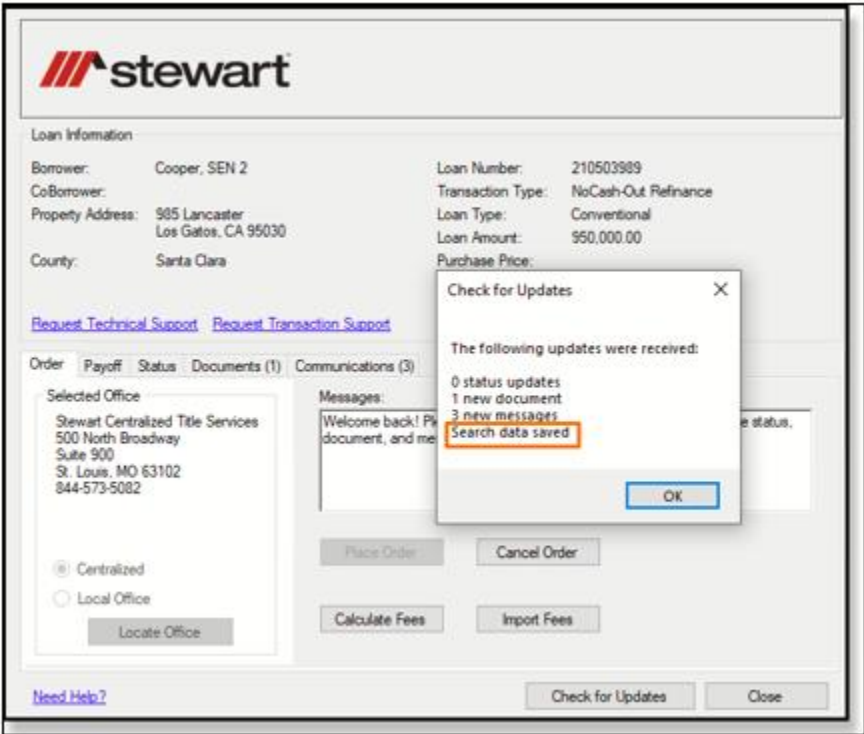


Note: Notes sent to the Lender display with the office name in the Sender column of the Communications grid. Notes sent by the Lender display as the name of the person signed into the *Stewart Title Company Plugin* when the message was sent.

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**

Borrower Information - Vesting

Tax ID/Trust No. Trust Date/Year Amended Date/Year Build Beneficiary

Tax ID/Trust No. Trust Date/Year Amended Date/Year Build Beneficiary

Vesting Information

Name	SSN	DOB	AKA	Type	P
SEN 2 Cooper		//		Individual	

<

Manner in which Title will be held

Final Vesting To Read

SEN 2 Cooper, an unmarried man

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

Property Information

Prelim Information

Title Information

Book Original Loan Number Dated //

Page Original Principal Current Principal Title Report Date //

Parcel Number 132-1234-123-1234 Approved Items

Lot Tax Message

Block Special Endorsements

Section

Type of Recording Jurisdiction County Name of Recording Jurisdiction Santa Clara

Legal Description ☐ Attach legal description Copy from Page 1 of 1003

LOT 1, AS SHOWN ON THE MAP ENTITLED "SUBDIVISION NO. 11-111.01, The Village, VILLAGE 1" RECORDED ON December 31, 1900, IN BOOK 222 OF MAPS, AT PAGE 11, IN THE OFFICIAL RECORDS OF THE COUNTY OF Colorado, STATE OF CALIFORNIA.

EXCEPTING THEREFROM, ALL OIL, GAS AND MINERAL RIGHTS, WITHOUT ANY RIGHT OF SURFACE ENTRY, AS RESERVED IN THE DEED EXECUTED BY JOHN AND JENNY SMITH, AND RECORDED SEPTEMBER 1, 1900 IN BOOK 123456, PAGE 1111, OFFICIAL RECORDS.

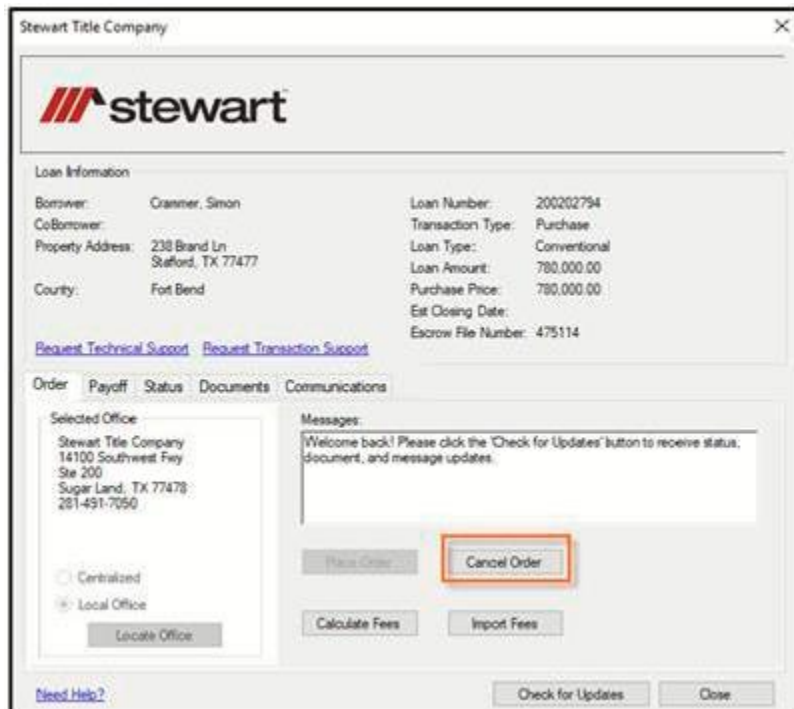
Canceling an Order

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.



The screenshot shows the Stewart Title Company plugin window. The 'Order' tab is selected. The 'Cancel Order' button is highlighted with a red rectangle. The interface includes a loan information section, a messages section, and buttons for 'Calculate Fees' and 'Import Fees'.

Stewart Title Company

stewart

Loan Information

Borrower:	Crammer, Simon	Loan Number:	200202794
CoBorrower:		Transaction Type:	Purchase
Property Address:	238 Brand Ln Stafford, TX 77477	Loan Type:	Conventional
County:	Fort Bend	Loan Amount:	780,000.00
		Purchase Price:	780,000.00
		Est Closing Date:	
		Escrow File Number:	475114

[Request Technical Support](#) [Request Transaction Support](#)

Order Payoff Status Documents Communications

Selected Office:
Stewart Title Company
14100 Southwest Frey
Ste 200
Sugar Land, TX 77478
281-491-7050

☐ Centralized
☒ Local Office

[Locate Office](#)

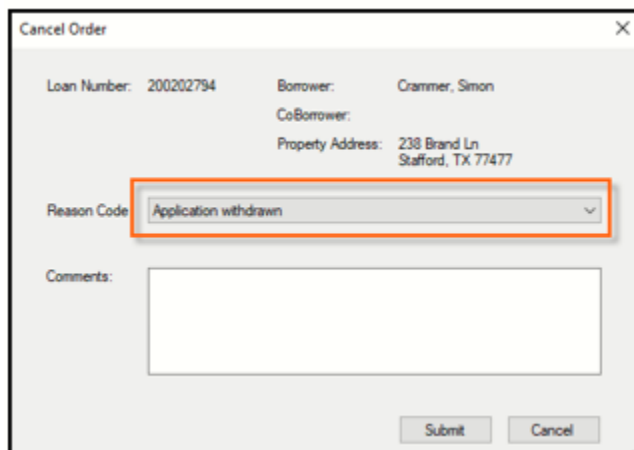
Messages:
Welcome back! Please click the 'Check for Updates' button to receive status, document, and message updates.

[Cancel Order](#)

[Calculate Fees](#) [Import Fees](#)

[Need Help?](#) [Check for Updates](#) [Close](#)

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.



The screenshot shows the 'Cancel Order' screen. The 'Reason Code' drop-down menu is highlighted with a red rectangle, showing 'Application withdrawn'. The screen includes fields for loan number, borrower, and property address, as well as a comments section and 'Submit' and 'Cancel' buttons.

Cancel Order

Loan Number: 200202794 Borrower: Crammer, Simon
CoBorrower:
Property Address: 238 Brand Ln
Stafford, TX 77477

Reason Code: Application withdrawn

Comments:

[Submit](#) [Cancel](#)

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

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

The screenshot shows the Stewart Title Company web application interface. At the top is the Stewart logo. Below it, the 'Loan Information' section displays details for a loan: Borrower: Cranmer, Simon; Co-Borrower: (blank); Property Address: 238 Brand Ln, Stafford, TX 77477; County: Fort Bend; Loan Number: 200202794; Transaction Type: Purchase; Loan Type: Conventional; Loan Amount: 780,000.00; Purchase Price: 780,000.00; Est Closing Date: (blank); Escrow File Number: 475114. Below this are links for 'Request Technical Support' and 'Request Transaction Support'. A tabbed interface shows 'Order', 'Payoff', 'Status', 'Documents', and 'Communications'. The 'Status' tab is active, showing 'Selected Office' information for Stewart Title Company and a 'Messages' box with the text: 'Your cancellation request has been submitted. Please visit the Status tab for updates.' Below the messages are buttons for 'Place Order', 'Cancel Order', 'Calculate Fees', and 'Import Fees'. At the bottom are 'Check for Updates' and 'Close' buttons. A 'Need Help?' link is also present.

- 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