



# landtech

POWERED BY ACCUTITLE

## Stewart Title Guaranty Company

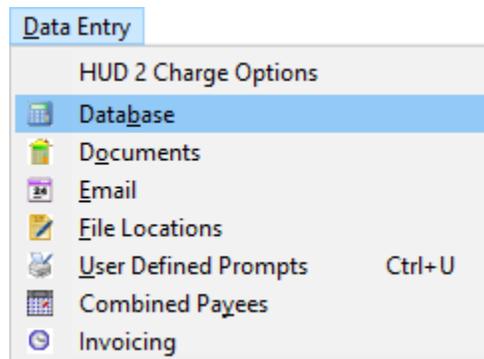


**Landtech** provides built-in integration with Stewart Title Guaranty Company's web based underwriter service. This enables you to access their web based service from within **Landtech** to request and receive Closing Protection Letters (CPL) and title insurance policy jackets.

### Initializing Stewart Title's Underwriter Service

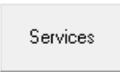
To activate the Stewart Title Guaranty Company's underwriter service in **Landtech**, you must enter your logon ID and password. These are provided by Stewart Title. To do so, you will need to access the **Company** database.

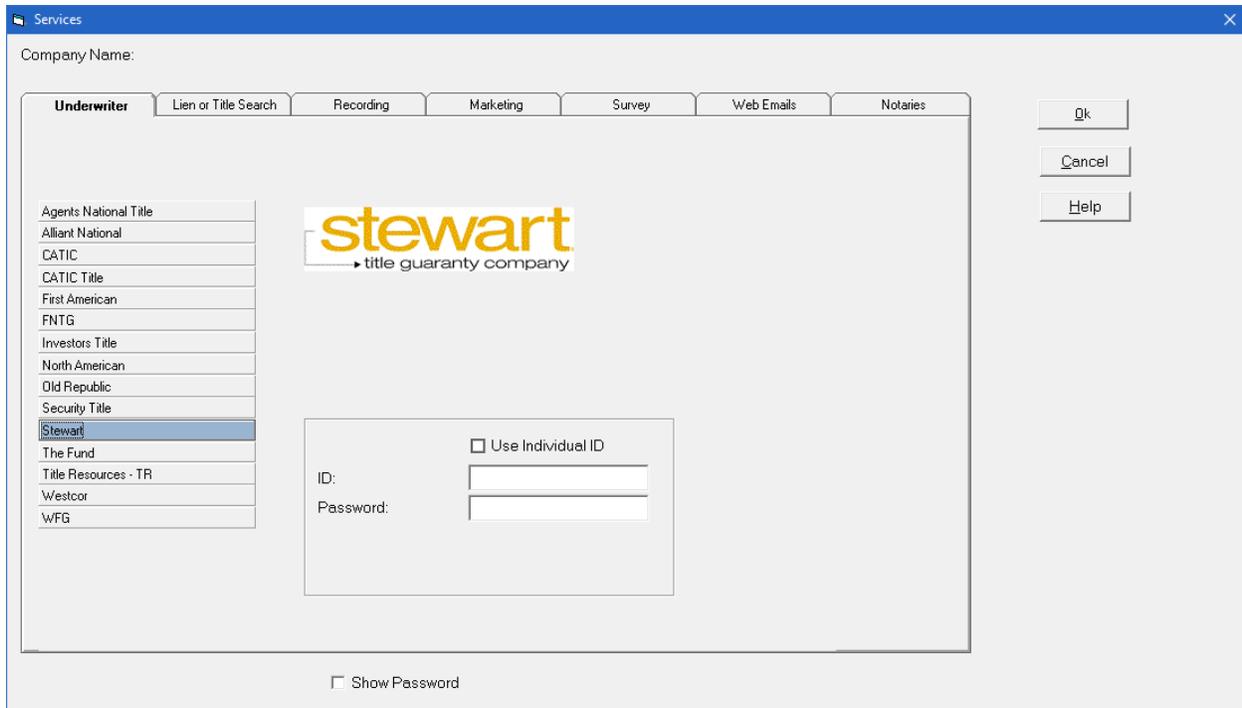
- Click on **Data Entry** on the menu bar or press **ALT + D**. The **Data Entry** drop-down menu will be displayed.



- Click on **Database** or press **B**. The **Databases** dialog box will be displayed with the **Company** database presented first.

There is a button located on the lower right of the *Company* database dialog box labeled *Services*. Clicking this button will display a dialog box enabling you to enter your logon ID and password for Stewart Title Guaranty Company’s underwriter service.

- To enter your logon ID and password, click . The *Services* dialog box will be displayed.
- Click on the *Stewart* button to display the Stewart Title Guaranty Company’s initialization screen.



Stewart Title Guaranty Company’s underwriter service may require a unique logon ID and password for each user. If this is the case, all you have to do is click on the **Use Individual ID** check box to activate the Stewart Title Guaranty Company’s underwriter service. Each user will then be prompted for their logon ID and password each time they access the Stewart Title Guaranty Company’s underwriter service.

However, fields for a logon ID and password are provided in the event there should only be one set of logon credentials for your office for the Stewart Title Guaranty Company’s underwriter service. If this is the case, you can enter your logon ID and password here and this ID and password will always be used to access the Stewart Title Guaranty Company’s underwriter service. You will not be prompted to enter your ID and password each time you access the Stewart Title Guaranty Company’s underwriter service.

- If you are entering your logon ID and password here, click on the **ID** text box and enter your logon ID.
- Click on the **Password** text box and enter your password.
- If you would like to see the password as you enter it, click on the **Show Password** check box. Doing so will help to ensure that you have entered your password correctly.

**Note:** The **Show Password** check box will only be available the first time you enter your logon credentials. Once you save the credentials by closing the **Services** dialog box, you will no longer have the option to see your password.

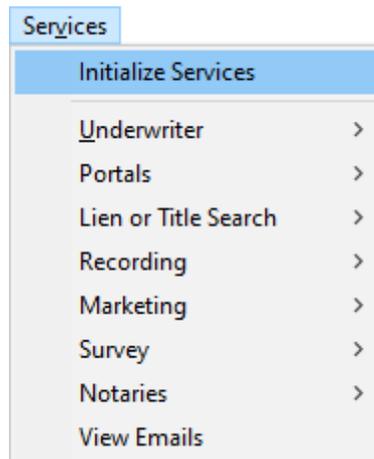
- Click  or press **ALT + O** to save the initialization and close the *Services* dialog box.

**Note:** If you currently request Closing Protection Letters (CPL) and title insurance policy jackets from Stewart Title Guaranty Company’s web service through their web portal, the logon ID and password you use should work seamlessly here. Therefore, use the same logon ID and password when initializing or accessing Stewart Title Guaranty Company’s web service through *Landtech*.

This initializes Stewart Title Guaranty Company’s underwriter service for the selected company only. If you have additional companies in your database also using Stewart Title Guaranty Company’s underwriter service, select the company or companies in the *Company* database and repeat the initialization process explained above for each company. This only needs to be done one time for each company.

If you are in a closing file, there are a couple of additional ways you can access the *Services* dialog box.

- Click on *Services* on the menu bar or press **ALT + V**. The *Services* drop-down menu will be displayed.



- Click on *Initialize Services*. The *Services* dialog box will be displayed.
- You can also click on the *Initialize Services* toolbar button  to access the *Services* dialog box.
- And finally, there is a button labeled *Services* on the *Settlement* screen of the *HUD Page 1 General Information* dialog box in *Landtech XML* and the *Settlement* screen of the *CD 1 General Information* dialog box in *Landtech cfpb* that will enable you to gain access to the *Services* dialog box.

**Hud Page1 General Information - Settlement**

Settlement Information

Type of Loan: **Veterans Administration**  Refinance/Equity Line of Credit  Use HUD-1A

	Date	Time
Settlement	10/01/13	

Proration Date: 10/01/13  
 Disbursement Date: 10/01/13  
 Recision Date:   
 Order Date:   
 Anchor Date: 03/20/14  
 GFE Date:   
 Recording File: PALM.FL  
 County: Palm Beach

Current Default Company: [01-00-00]

Company Number	01-00-00
Title Name	Titles R Us
Title Street	1000 Main Street
Title Address 2	Test address
Title Address 3	
Title City, State, Zip	Royal Palm Beach, Florida 33411
Settlement Company	Titles R Us
Block H Line 2	Block H Line 2
Settlement Street Address	1000 Main Street
Settlement 2nd Address	2nd test address
Settlement City, State Zip	Royal Palm Beach, Florida 33411
Prepared By	Steve Vnnt

Services

**CD 1 General Information - Settlement**

Settlement Information

Loan Purpose: **Purchase**  Refinance/Without Seller  Use Alternative cfpb Format

Loan Product: **Fixed Rate**

Type of Loan: **Conventional Loan Uninsured** Other Type:

	Date	Time
Settlement	06/29/16	

Proration Date: 06/29/16  
 Disbursement Date: 06/29/16  
 Recision Date:   
 Order Date:   
 Anchor Date:   
 Estimate Date:   
 cfpb Issued Date:   
 Recording File: BAY.FL  
 County: Bay

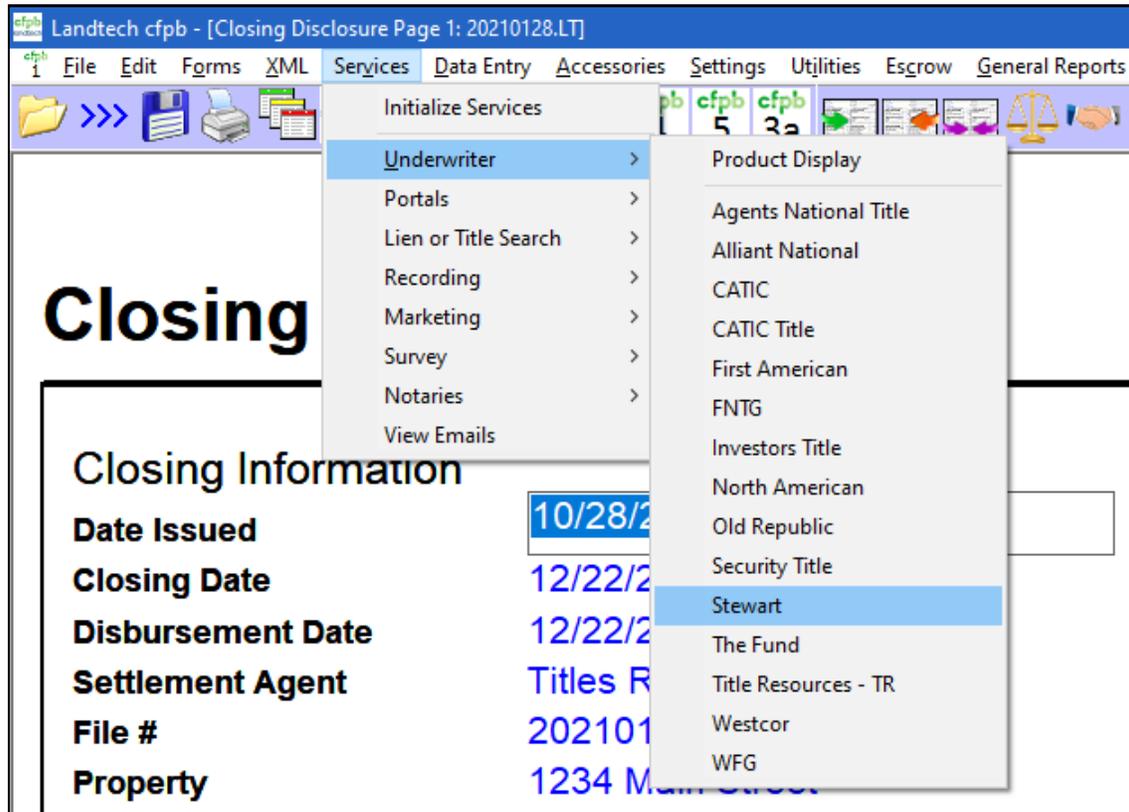
Current Default Company: [01-00-00] Use as Contact:  Contact  Closer Pr  SalesRep  Attorney 1  Attorney 2  Attorney 3  Attorney 4

Company Number	01-00-00
Title Name	Titles R Us
Title Street	1000 Main Street
Title Address 2	Test address
Title Address 3	
Title City, State, Zip	Royal Palm Beach, Florida 33411
Settlement Company	Titles R Us
Block H Line 2	Block H Line 2
Settlement Street Address	1000 Main Street
Settlement 2nd Address	2nd test address
Settlement City, State Zip	Royal Palm Beach, Florida 33411
Prepared By	Steve Vogt
Company Payto	Titles R Us
Phone	561-555-9928
Phone 2	

Services

Use Settlement as Contact

Once initialized, the *Product Display* and *Stewart* items become available and ready for use on the *Underwriter* menu under the *Services* menu bar item in *Landtech*.

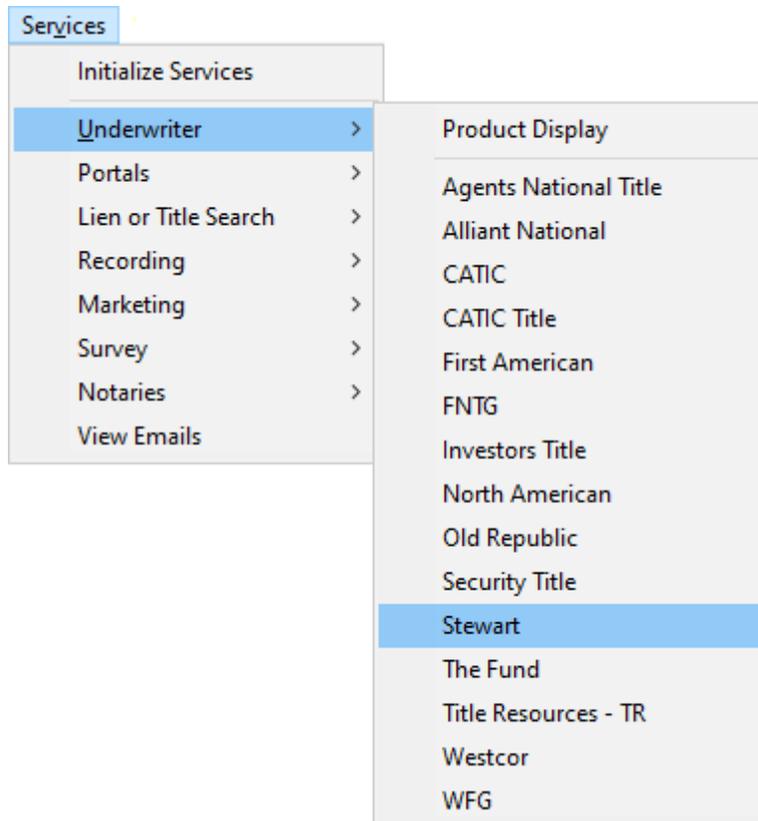


## Using the Stewart Title Underwriter Service

The *Stewart* selection on the *Underwriter* menu enables you to request and receive Closing Protection Letters (CPL) and title insurance policy jackets from Stewart Title's web based service.

To request a title product from the Stewart Title's web service, you must be in an open closing file.

- While in an open closing file, click on *Services* on the menu bar or press **ALT + V**. The *Services* drop-down menu is displayed.
- Position the mouse pointer on *Underwriter* or press **U**.



- Click on *Stewart*.

If you only use a single set of logon credentials for your office, the ***Landtech Stewart Integration*** dialog box will be displayed immediately.

If each user must have unique logon credentials, you will be prompted to enter your logon credentials in order to access the underwriter service.

Stewart Sign On Info

Company Name: Titles R Us

ID:

Password:

Show Password  Remember Me

Remember Me & Password

Delete Ok Cancel

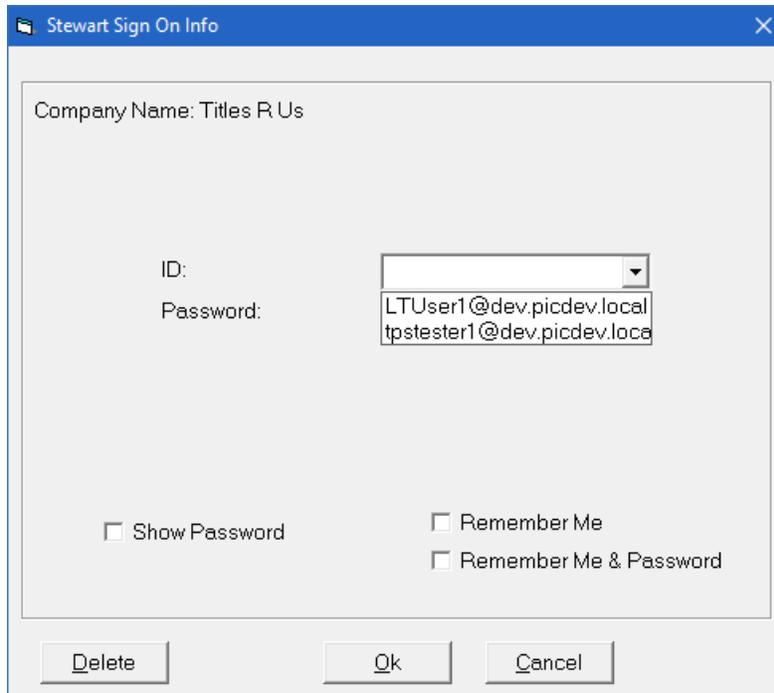
- Enter your logon ID in the **ID** text box.
- Enter your password in the **Password** text box.
- If you would like to see the password as you enter it, click on the **Show Password** check box. Doing so will help to ensure that you have entered your password correctly.

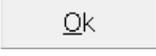
**Note:** The **Show Password** check box will only be available the first time you enter your logon credentials. Once you save the credentials, you will no longer have the option to see your password.

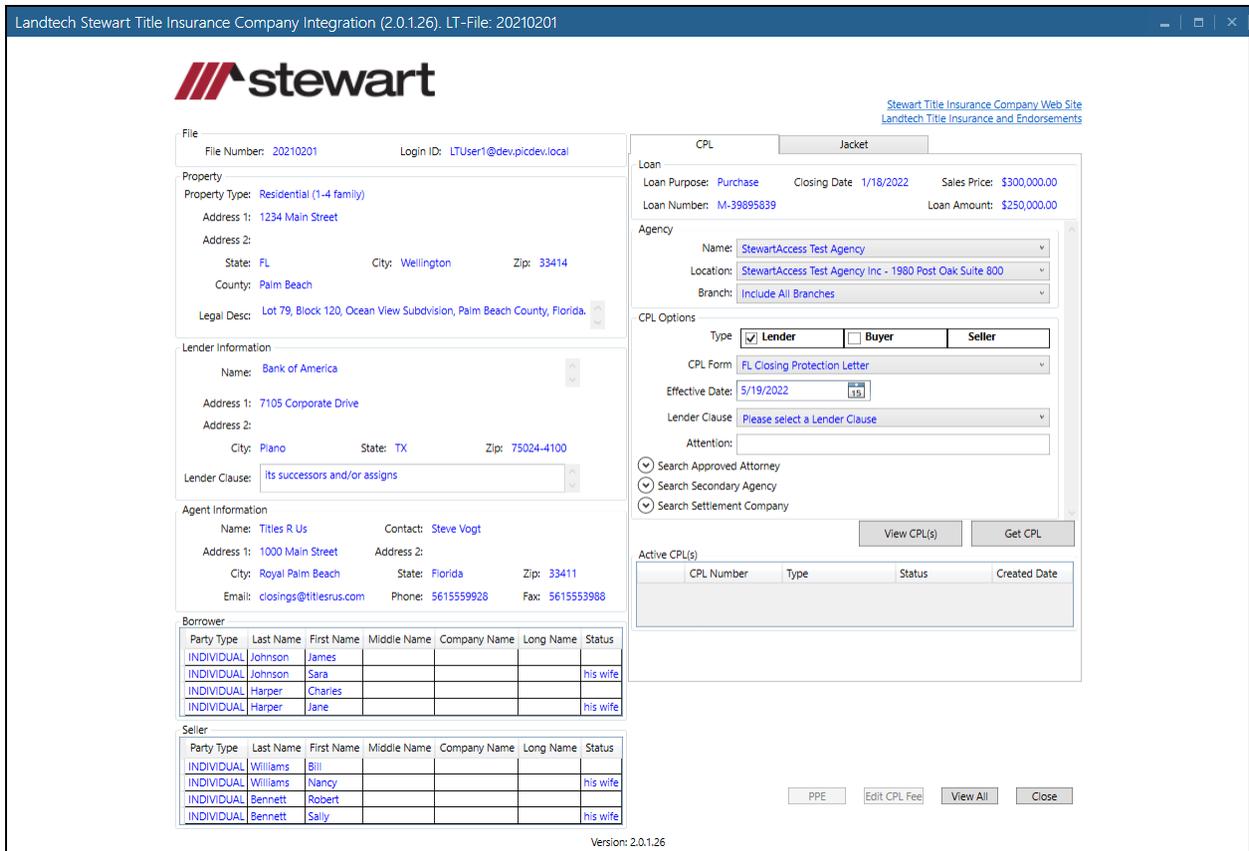
- If you would like the program to remember your logon ID so that you do not have to enter it every time, click on the **Remember Me** check box. From this point forward, each time you access the product request facility, your logon ID will be loaded automatically. However, you will still have to enter your password.
- If you would like the program to remember your logon ID and password, click on the **Remember Me & Password** check box. From this point forward, each time you access the product request facility, your logon ID and password will be loaded automatically.

If you have used more than one set of logon credentials to access the product request facility, you can then use the drop-down list to select the desired logon ID.

- Click on the down arrow  next to the **ID** text box.



- Click on the desired logon ID.
- If you want to delete a logon ID, select it from the drop-down list and click on the  button or press **ALT + D**.
- Once you have entered or selected your logon credentials, click  or press **ALT + O** to continue. The *Landtech Stewart Title Insurance Company Integration* dialog box will be displayed.



This dialog box populates automatically with the information from the closing file necessary to request Closing Protection Letters (CPL) and title insurance policy jackets.

Also, different agents/states/jurisdictions may have additional or different categories of items to select from. Whatever is appropriate for your company will be presented.

The **File** section in the upper left area of the dialog box shows the **Landtech** closing filename or number and your Stewart Title user logon ID.



The information shown in the **Property**, **Lender Information**, **Agent Information**, **Borrower** and **Seller** sections is pulled automatically from the current open closing file.

The **Lender Information** section has a field for a lender or mortgage clause. If a lender or mortgage clause had been entered in the **Landtech** closing file, it will appear in this field. When requesting a CPL, if you do not select a mortgage clause in the **CPL Options** section, the clause in this field will be used by default.

**Lender Information**

Name: Bank of America, NA

Address 1: 1500 Central Ave.

Address 2:

City: Atlanta State: GA Zip: 30032

Lender Clause: its successors and/or assigns

There are two links in the upper right area of the screen provided for convenience. The first one is a direct link to the Stewart Title Insurance Company web portal. Therefore, you can click on the *Stewart Title Insurance Company Web Site* link and go directly to their web portal from within *Landtech*.

The second link is a summary form of the title insurance and endorsement premiums that were entered in the closing file in *Landtech*. Clicking on the *Landtech Title Insurance and Endorsements* link will display the form shown below.

**Title Insurance & Endorsements Window**

Owner's Premium		Loan Premium	
Effective Date:	12/22/2021	Effective Date:	12/22/2021
Coverage:	300,000.00	Coverage:	250,000.00
Total Premium:	1,330.00	Total Premium:	25.00
Agent Premium:	931.00	Agent Premium:	17.50
Underwriter Premium:	399.00	Underwriter Premium:	7.50

Endorsement Title	Premium	Underwriter Due	Net Premium
ALTA 8.1 Environmental Protection	25.00	7.50	17.50
ALTA 5.0 PUD Endorsement	25.00	7.50	17.50
ALTA 9.1 Endorsement	135.50	40.65	94.85
ALTA 5.1 PUD Endorsement	25.00	7.50	17.50

OK

This can be used as a reference as you request CPLs and title insurance policy jackets. The form is separate so with multiple monitors you may move it to another monitor so it remains open while you request title products.

**Note:** The product request and title insurance and endorsements screens are in Windows Presentation Foundation (WPF) format and are scalable. You can adjust the size of the screen to your liking and the size will be remembered on subsequent openings.

## Requesting a Closing Protection Letter (CPL)

The *CPL* tab contains the information and options available for the CPL request.

The screenshot shows a web interface for requesting a Closing Protection Letter (CPL). At the top, there are two tabs: 'CPL' (selected) and 'Jacket'. Below the tabs, the form is organized into several sections:

- Loan Section:** Displays loan details including Loan Purpose (Purchase), Closing Date (1/18/2022), Sales Price (\$300,000.00), Loan Number (M-39895839), and Loan Amount (\$250,000.00).
- Agency Section:** Contains three dropdown menus for Name (StewartAccess Test Agency), Location (StewartAccess Test Agency Inc - 1980 Post Oak Suite 800), and Branch (Include All Branches).
- CPL Options Section:** Includes checkboxes for Coverage Options (Lender checked, Buyer and Seller unchecked), a dropdown for CPL Type (FL Closing Protection Letter), a date picker for Effective Date (3/17/2022), a dropdown for Mortgage Clause (Please Select a Mortgage Clause), and an Attention field.
- Search Options:** Two expandable sections for 'Search Secondary Agency' and 'Search Settlement Company'.
- Buttons:** 'View CPL(s)' and 'Get CPL' buttons are located below the search options.
- Active CPL(s) Table:** A table with columns for Reference #, Name, Status, and Created Date, currently showing no data.

- The information in the *Loan* section is pulled from the current open closing file in *Landtech*.
- In the *Agency* section, the *Name* field will default to your company provided there is only one company associated with your account. If you have more than one company registered with Stewart Title you will need to select the company. Click on the down arrow  next to the *Name* field and select the desired company from the drop-down list.

CPL      Jacket

Loan  
 Loan Purpose: Purchase      Closing Date: 1/18/2022      Sales Price: \$300,000.00  
 Loan Number: M-39895839      Loan Amount: \$250,000.00

Agency  
 Name: StewartAccess Test Agency  
 Location: StewartAccess Test Agency  
 Branch: Include All Branches

CPL Options  
 Coverage Options:  Lender     Buyer     Seller  
 CPL Type: FL Closing Protection Letter  
 Effective Date: 3/17/2022  
 Mortgage Clause: Please Select a Mortgage Clause  
 Attention: \_\_\_\_\_  
 Search Secondary Agency  
 Search Settlement Company

View CPL(s)    Get CPL

Active CPL(s)

Reference #	Name	Status	Created Date

- The **Location** field defaults to the address associated with the company selection in the **Name** field. If your company has more than one location and the address shown is not the correct address, click on the down arrow  next to the **Location** field and select the correct address.

CPL Jacket

Loan  
 Loan Purpose: Purchase Closing Date 1/18/2022 Sales Price: \$300,000.00  
 Loan Number: M-39895839 Loan Amount: \$250,000.00

Agency  
 Name: StewartAccess Test Agency  
 Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800  
 Branch: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800  
 SA Test Agency with 100 characters in the Legal Name 100 characters to b  
 StewartAccess Test Agency Inc - 788 W Sam Houston Pkwy N Suite 206

CPL Options  
 Coverage Options:  Lender  Buyer  Seller  
 CPL Type: FL Closing Protection Letter  
 Effective Date: 3/17/2022  
 Mortgage Clause: Please Select a Mortgage Clause  
 Attention:

Search Secondary Agency  
 Search Settlement Company

View CPL(s) Get CPL

Active CPL(s)

Reference #	Name	Status	Created Date

- The **Branch** field enables you to specify whether or not to include other locations or entities for the CPL request. Click on the down arrow  next to the **Branch** field and select the desired option.

CPL
Jacket

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**Loan**

Loan Purpose: Purchase      Closing Date: 1/18/2022      Sales Price: \$300,000.00  
 Loan Number: M-39895839      Loan Amount: \$250,000.00

**Agency**

Name: StewartAccess Test Agency ▾  
 Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 ▾  
 Branch: Include All Branches ▾

**CPL Options**

Coverage Options: None ▾  
Include All Branches ▾  
Corp Admin Office ▾  
 CPL Type: Blah Test

Effective Date: 3/17/2022

Mortgage Clause: Please Select a Mortgage Clause ▾

Attention:

Search Secondary Agency  
 Search Settlement Company

View CPL(s)
Get CPL

**Active CPL(s)**

Reference #	Name	Status	Created Date

The coverage options available in your state or jurisdiction are indicated by a check box next to the party. If there is no check box, then that coverage option is not available. The default coverage option is **Lender**. You can only select one coverage option per CPL. Therefore, if you attempt to select a different coverage option, the previously selected option is automatically deselected.

CPL
Jacket

**Loan**

Loan Purpose: Purchase      Closing Date: 1/18/2022      Sales Price: \$300,000.00

Loan Number: M-39895839      Loan Amount: \$250,000.00

**Agency**

Name: StewartAccess Test Agency ▼

Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 ▼

Branch: Include All Branches ▼

**CPL Options**

Coverage Options:  **Lender**     **Buyer**     **Seller**

CPL Type: FL Closing Protection Letter ▼

Effective Date: 3/17/2022

Mortgage Clause: Please Select a Mortgage Clause ▼

Attention:

Search Secondary Agency

Search Settlement Company

View CPL(s)
Get CPL

**Active CPL(s)**

Reference #	Name	Status	Created Date

- If there is only one CPL type for your state or jurisdiction, the **CPL Type** field will default to that CPL type. However, if your state or jurisdiction offers more than one type of CPL, you will need to select the one you want. Click on the down arrow  next to the **CPL Type** field and select the desired CPL from the drop-down list.

CPL
Jacket

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**Loan**  
 Loan Purpose: Purchase      Closing Date: 1/18/2022      Sales Price: \$300,000.00  
 Loan Number: M-39895839      Loan Amount: \$250,000.00

**Agency**  
 Name: StewartAccess Test Agency ▾  
 Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 ▾  
 Branch: Include All Branches ▾

**CPL Options**  
 Coverage Options:  **Lender**     **Buyer**     **Seller**  
 CPL Type: FL Closing Protection Letter ▾  
 Effective Date: FL Closing Protection Letter calendar  
 Mortgage Clause: Please Select a Mortgage Clause ▾  
 Attention:   
 Search Secondary Agency  
 Search Settlement Company

**Active CPL(s)**

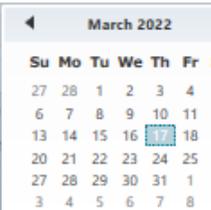
Reference #	Name	Status	Created Date

- The *Effective Date* field defaults to the current system (today's) date. If you need a different date, click in the *Effective Date* field and enter the desired date. You can also click on the calendar icon  and select the date from the pop-up calendar.

CPL      Jacket

Loan  
 Loan Purpose: Purchase      Closing Date: 1/18/2022      Sales Price: \$300,000.00  
 Loan Number: M-39895839      Loan Amount: \$250,000.00

Agency  
 Name: StewartAccess Test Agency  
 Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800  
 Branch: Include All Branches

CPL Options  
 Coverage Options:  Lender     Buyer     Seller  
 CPL Type: FL Closing Protection Letter  
 Effective Date: 3/17/2022  
 Mortgage Clause:   
 Attention:  
 Search Secondary  
 Search Settlement

Active CPL(s)

Reference #	Name	Status	Created Date

New CPL(s)      Get CPL

- If you need a lender or mortgage clause for the lender on the Lender CPL, you can select one from the *Mortgage Clause* field. Click on the down-arrow  next to the *Mortgage Clause* field and select the desired lender or mortgage clause from the drop-down list.

If you make a selection in the *Mortgage Clause* field, that will supersede a lender or mortgage clause entered in the closing file.

However, if you do not select a lender or mortgage clause but a lender or mortgage clause had been entered in the closing file, that clause will be included on the CPL by default. As previously mentioned, the lender or mortgage clause entered in the closing file will be displayed in the *Lender Clause* field in the *Lender Information* section.

If you do not select a lender or mortgage clause and there was no lender or mortgage clause entered in the closing file, then there will be no lender or mortgage clause on the CPL.

- If the CPL needs to be made to the attention of a particular individual or department, enter the name or department in the *Attention* field.

CPL
Jacket

**Loan**

Loan Purpose: Purchase      Closing Date: 1/18/2022      Sales Price: \$300,000.00

Loan Number: M-39895839      Loan Amount: \$250,000.00

**Agency**

Name: StewartAccess Test Agency

Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800

Branch: Include All Branches

**CPL Options**

Coverage Options:  **Lender**     **Buyer**     **Seller**

CPL Type: FL Closing Protection Letter

Effective Date: 3/17/2022

Mortgage Clause: Its successors and or assigns as their interests may appear.

Attention: Phil Seymore

Search Secondary Agency

Search Settlement Company

View CPL(s)
Get CPL

**Active CPL(s)**

Reference #	Name	Status	Created Date

If an approved attorney is required in your state or jurisdiction, you will have the ability to select one. If not, a field for **Approved Attorney** will not be presented. The property in the sample file that we are using has an address in a state that does not require an approved attorney. Therefore there is no selection for an approved attorney. However, in the screen shot below, the property address is in a state that uses approved attorneys. Therefore, a field is provided for entering or selecting an approved attorney.

CPL
Jacket

**Loan**

Loan Purpose: Purchase      Closing Date: 1/18/2022      Sales Price: \$300,000.00

Loan Number: M-39895839      Loan Amount: \$250,000.00

**Agency**

Name: StewartAccess Test Agency ▼

Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 ▼

Branch: Include All Branches ▼

**CPL Options**

Coverage Options:  **Lender**     **Buyer**     **Seller**

CPL Type: GA Single Transaction CPL Lender, Purchaser ▼

Effective Date: 3/17/2022 15

Mortgage Clause: Its successors and or assigns as their interests may appear. ▼

Attention: Phil Seymore

⌵ Search Approved Attorney

⌵ Search Secondary Agency

View CPL(s)    Get CPL

**Active CPL(s)**

	Reference #	Name	Status	Created Date

- In order to find and select an approved attorney, you must do a search. Click on the down arrow ⌵ next to ***Search Approved Attorney*** to expand the approved attorney section.

CPL
Jacket

**Loan**

Loan Purpose: Purchase      Closing Date: 1/18/2022      Sales Price: \$300,000.00

Loan Number: M-39895839      Loan Amount: \$250,000.00

**Agency**

Name: StewartAccess Test Agency ▼

Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 ▼

Branch: Include All Branches ▼

**CPL Options**

Coverage Options:  **Lender**     **Buyer**     **Seller**

CPL Type: GA Single Transaction CPL Lender, Purchaser ▼

Effective Date: 3/17/2022 15

Mortgage Clause: Its successors and or assigns as their interests may appear. ▼

Attention: Phil Seymore

**Search Approved Attorney**

Name:       City:       State: GA ▼

Zip:       Country:       Search

Approved Attorney:   ▼     Favorite?

**Search Secondary Agency**

View CPL(s)    Get CPL

**Active CPL(s)**

Reference #	Name	Status	Created Date

- You can conduct the search by any of the fields provided. Enter the desired search criteria and click on the Search button.

CPL
Jacket

**Loan**

Loan Purpose: Purchase      Closing Date: 1/18/2022      Sales Price: \$300,000.00

Loan Number: M-39895839      Loan Amount: \$250,000.00

**Agency**

Name: StewartAccess Test Agency ▼

Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 ▼

Branch: Include All Branches ▼

**CPL Options**

Coverage Options:  **Lender**     **Buyer**     **Seller**

CPL Type: GA Single Transaction CPL Lender, Purchaser ▼

Effective Date: 3/17/2022

Mortgage Clause: Its successors and or assigns as their interests may appear. ▼

Attention: Phil Seymore

⬆ Search Approved Attorney

Name:       City: Atlanta      State: GA ▼

Zip:       Country:      

Approved Attorney:  ▼     Favorite?

⬇ Search Secondary Agency

**Active CPL(s)**

Reference #	Name	Status	Created Date

- The results will populate the *Approved Attorney* drop-down list. To select the desired approved attorney, click on the down arrow  next to the *Approved Attorney* field.



CPL
Jacket

**Loan**

Loan Purpose: Purchase      Closing Date: 1/18/2022      Sales Price: \$300,000.00

Loan Number: M-39895839      Loan Amount: \$250,000.00

**Agency**

Name: StewartAccess Test Agency

Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800

Branch: Include All Branches

**CPL Options**

Coverage Options:  **Lender**     **Buyer**     **Seller**

CPL Type: GA Single Transaction CPL Lender, Purchaser

Effective Date: 3/17/2022

Mortgage Clause: Its successors and or assigns as their interests may appear.

Attention: Phil Seymore

Search Approved Attorney

Name:       City: Atlanta      State: GA

Zip:       Country:      

Approved Attorney: BC Law Firm, P.A. (Barry Carother)     Favorite?

Search Secondary Agency

**Active CPL(s)**

Reference #	Name	Status	Created Date

- If you would like to designate the approved attorney as a favorite, check the ***Favorite?*** check box.
- In some states, it is sometimes desired to have only the approved attorney appear on the CPL and not the agency. If the property resides in one of these states, you will see an additional check box labeled ***Print Attorney Only***. If this option is desired, check the ***Print Attorney Only*** check box.

CPL
Jacket

**Loan**

Loan Purpose: Purchase    Closing Date: 1/18/2022    Sales Price: \$300,000.00

Loan Number: M-39895839    Loan Amount: \$250,000.00

---

Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 ▾

Branch: Include All Branches ▾

**CPL Options**

Type:  **Lender**     **Buyer**     **Seller**

CPL Type: AL Single Transaction CPL Lender, Purchaser, Lessee or Borrower ▾

Effective Date: 5/5/2022

Lender Clause: ISAQA/ATIMA ▾

Attention: Jim Smith

Search Approved Attorney

Name:

City:     State: AL ▾    Zip:

Address:    

Approved Attorney: BHM Law Group, LLC (Brandc ▾     Favorite?     Print Attorney Only

Search Secondary Agency

**Active CPL(s)**

CPL Number	Type	Status	Created Date

You have the ability to specify a secondary agency to be included in the CPL. However, you can only select a secondary agency if you did not select an approved attorney. If you did not select an approved attorney and you want to select a secondary agency, you must do a search for the secondary agency.

- Click on the down arrow  next to **Search Secondary Agency** to expand the secondary agency section.

CPL Jacket

Loan  
 Loan Purpose: Purchase Closing Date 1/18/2022 Sales Price: \$300,000.00  
 Loan Number: M-39895839 Loan Amount: \$250,000.00

Branch: Include All Branches

CPL Options  
 Coverage Options:  Lender  Buyer  Seller  
 CPL Type: GA Single Transaction CPL Lender, Purchaser  
 Effective Date: 3/17/2022  
 Mortgage Clause: Its successors and or assigns as their interests may appear.  
 Attention: Phil Seymore

Search Approved Attorney  
 Name: City: Atlanta State: GA  
 Zip: Country: Search  
 Approved Attorney: BC Law Firm, P.A. (Barry Carother)  Favorite?

Search Secondary Agency  
 Name: City: State: GA  
 Zip: Country: Search  
 Secondary Agency:  Favorite?

View CPL(s) Get CPL

Active CPL(s)

Reference #	Name	Status	Created Date

- Search for and select a secondary agency in the same manner as described previously for the approved attorney.

In some states there is also the ability to select a settlement company. If that selection applies to the state the property is located in, you will see a selection for it as shown in the picture below.

CPL
Jacket

**Loan**

Loan Purpose: Purchase      Closing Date: 1/18/2022      Sales Price: \$300,000.00

Loan Number: M-39895839      Loan Amount: \$250,000.00

**Agency**

Name: StewartAccess Test Agency ▼

Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 ▼

Branch: Include All Branches ▼

**CPL Options**

Coverage Options:  **Lender**     **Buyer**     **Seller**

CPL Type: FL Closing Protection Letter ▼

Effective Date: 3/17/2022 15

Mortgage Clause: Its successors and or assigns as their interests may appear. ▼

Attention: Phil Seymore

Search Secondary Agency

Search Settlement Company

View CPL(s)
Get CPL

**Active CPL(s)**

	Reference #	Name	Status	Created Date

You can only select a settlement company if you don't select an approved attorney or secondary agency. Only one of those additional entities is allowed for the CPL request.

- If you want to specify a settlement company, click on the down arrow next to **Search Settlement Company** to expand the settlement company section.

CPL Jacket

Loan  
 Loan Purpose: Purchase Closing Date 1/18/2022 Sales Price: \$300,000.00  
 Loan Number: M-39895839 Loan Amount: \$250,000.00

Agency  
 Name: StewartAccess Test Agency  
 Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800  
 Branch: Include All Branches

CPL Options  
 Coverage Options:  Lender  Buyer  Seller  
 CPL Type: FL Closing Protection Letter  
 Effective Date: 3/17/2022  
 Mortgage Clause: Its successors and or assigns as their interests may appear.  
 Attention: Phil Seymore

Search Secondary Agency  
 Search Settlement Company  
 Name: City: State: FL  
 Zip: Country: Search  
 Settlement Company: Favorite?

View CPL(s) Get CPL

Active CPL(s)

Reference #	Name	Status	Created Date

- Search for and select a settlement company in the same manner as described previously for the approved attorney.

Once you have all of the required information entered or selected, you can request the CPL.

- To request the CPL, click the **Get CPL** button. The Closing Protection Letter will be displayed on your screen as well as downloaded in PDF format to the location on your system specified in the *Digital Files Folder Path* field of the *Digital Files Access* setting under Settings.
- Once the CPL is received, it will show in the *Active CPL(s)* list.

CPL      Jacket

Loan  
 Loan Purpose: Purchase      Closing Date: 1/18/2022      Sales Price: \$300,000.00  
 Loan Number: M-39895839      Loan Amount: \$250,000.00

Agency  
 Name: StewartAccess Test Agency  
 Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800  
 Branch: Include All Branches

CPL Options  
 Coverage Options:  Lender     Buyer     Seller  
 CPL Type: FL Closing Protection Letter  
 Effective Date: 3/17/2022  
 Mortgage Clause: Its successors and or assigns as their interests may appear.  
 Attention: Phil Seymore

Search Secondary Agency  
 Name:      City:      State: FL  
 Zip: 33414      Country:      Search  
 Secondary Agency: South Shore Title, Inc. - 12798 W.     Favorite?

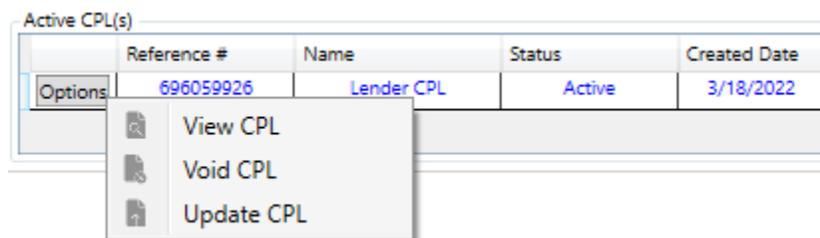
Search Settlement Company

View CPL(s)    Get CPL

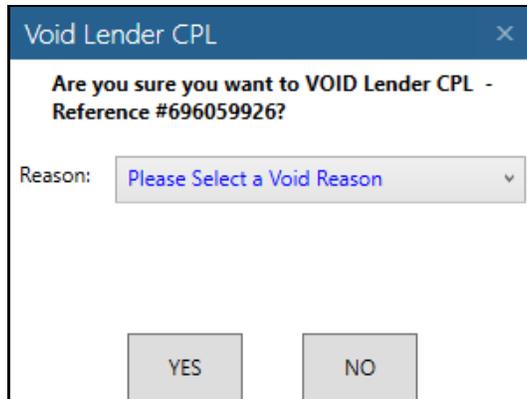
Active CPL(s)

	Reference #	Name	Status	Created Date
Options	696059926	Lender CPL	Active	3/18/2022

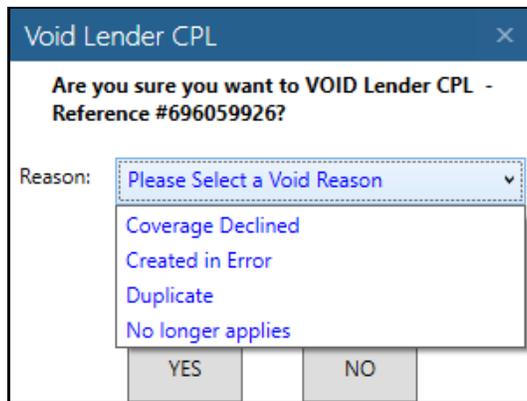
- Clicking the **Options** button provides access to the options available for a CPL. The options available to CPLs are viewing, voiding and updating.

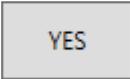
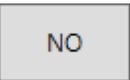
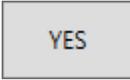


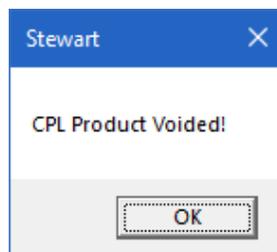
- To view the CPL, click **View CPL**. The CPL will be displayed on your screen as a PDF.
- If you need to void a CPL, you can do so by clicking the **Void CPL** option. You will be prompted to confirm that you want to void the CPL.



- You must provide a reason for voiding the CPL. Click on the down arrow  for the **Reason** field and select the desired reason for voiding the CPL.



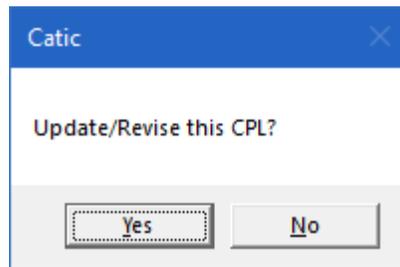
- Click  to complete the voiding of the CPL. It will no longer be shown in the **Active CPL(s)** section.
- Click  if you do not want to void the CPL.
- If you clicked , you will see a confirmation message that the CPL has been successfully voided.



- Click  to continue. The CPL will no longer appear in the *Active CPL(s)* section.

If you need to modify any of the information contained in the CPL such as the parties to the transaction, property address, lender, lender or mortgage clause, etc, you can do so using the *Update CPL* option. Make the desired changes in the *Landtech* closing file and/or the *Attention* and *Mortgage Clause* fields on the CPL screen. Then update the CPL.

- Click the *Update CPL* option from the *Options* selections. You will be presented with a confirmation message.



- Click  to continue and update the CPL. The CPL will be reissued with the updated information that was submitted and with a new CPL number. The previous CPL will be voided and become inactive.
- Click  if you change your mind and do not want to update the CPL.
- You can view all CPLs that have been requested for this transaction whether active or void by clicking the  button. This will display the *CPL Window* dialog box.

Action	Type	Reference #	Status	Created Date
<a href="#">View</a>	Lender CPL	696059926	Void	3/18/2022 3:02:57 PM
<a href="#">View</a>	Buyer/Borrc	696055157	Active	3/18/2022 3:10:32 PM

[Close](#)

- You can view active CPLs by clicking on the ***View*** link.
- You cannot view an inactive or void CPL, therefore, the ***View*** link is disabled.
- Click [Close](#) to close the ***CPL Window*** dialog box and return to the ***CPL*** screen.

## Requesting a Title Insurance Policy Jacket

The ***Jacket*** tab contains the information and options available to request title insurance policy and commitment jackets.

- Click on the ***Jacket*** tab to display the policy jacket request screen.

CPL
Jacket

**Loan**

Loan Purpose: Purchase    Closing Date: 1/18/2022    Sales Price: \$300,000.00

Loan Number: M-39895839    Loan Amount: \$250,000.00

**Agency**

Name: StewartAccess Test Agency ▼

Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800

**Jacket Options**

Property Type: Residential - General

**Jacket**    Prior Policy     Simultaneous Issue

Jacket Type: Please Select a Policy Type

Jacket Form: Please Select a Jacket Form Type

Effective Date: 1/18/2022 15

Liability: \$0.00

Premium: \$0.00    Remittance: \$0.00

Endorsements

View Jacket(s)    Get Jacket

**Active Jacket(s)**

Policy Number	Type	Status	Created Date

- The **Name** field contains your company. If you have more than one company registered with Stewart Title and the one showing is not the correct company, click on the down arrow ▼ next to the **Name** field and select the correct company.

CPL
Jacket

Loan

Loan Purpose: Purchase    Closing Date: 1/18/2022    Sales Price: \$300,000.00

Loan Number: M-39895839    Loan Amount: \$250,000.00

Agency

Name: StewartAccess Test Agency

Location: StewartAccess Test Agency

Jacket Options

Property Type: Residential - General

Jacket    Prior Policy     Simultaneous Issue

Jacket Type: Please Select a Policy Type

Jacket Form: Please Select a Jacket Form Type

Effective Date: 1/18/2022

Liability: \$0.00    Premium: \$0.00    Remittance: \$0.00

Endorsements

View Jacket(s)    Get Jacket

Active Jacket(s)

Policy Number	Type	Status	Created Date

- The **Location** field defaults to the address associated with the company selection in the **Name** field. If your company has more than one location and the address shown is not the correct address, click on the down arrow next to the **Location** field and select the correct address.

CPL
Jacket

**Loan**

Loan Purpose: Purchase      Closing Date: 1/18/2022      Sales Price: \$300,000.00

Loan Number: M-39895839      Loan Amount: \$250,000.00

**Agency**

Name: StewartAccess Test Agency

Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800

**Jacket Options**

Property Type: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800

SA Test Agency with 100 characters in the Legal Name 100 characters to l  
StewartAccess Test Agency Inc - 788 W Sam Houston Pkwy N Suite 206

**Jacket**      Prior Policy       Simultaneous Issue

Jacket Type: Please Select a Policy Type

Jacket Form: Please Select a Jacket Form Type

Effective Date: 1/18/2022 15

Liability: \$0.00

Premium: \$0.00      Remittance: \$0.00

Endorsements

View Jacket(s)
Get Jacket

**Active Jacket(s)**

Policy Number	Type	Status	Created Date

- In the **Jacket Options** section, the **Property Type** field will default to the selection made in the closing file. However, if it is not correct, select the desired property type. Click on the down arrow ▼ next to the **Property Type** field and select the property type from the **Property Type** drop-down list.

CPL
Jacket

**Loan**

Loan Purpose: Purchase    Closing Date: 1/18/2022    Sales Price: \$300,000.00

Loan Number: M-39895839    Loan Amount: \$250,000.00

**Agency**

Name: StewartAccess Test Agency

Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800

**Jacket Options**

Property Type: Residential - General

**Jacket**

Jacket Type: Please Select a Policy Type

Jacket Form: Please Select a Jacket Form Type

Effective Date: 1/18/2022

Liability: \$0.00

Premium: \$0.00    Remittance: \$0.00

Endorsements

View Jacket(s)    Get Jacket

**Active Jacket(s)**

Policy Number	Type	Status	Created Date

- On the **Jacket** tab, specify the jacket that you want to request.
- Click on the down arrow  for the **Jacket Type** field. The **Jacket Type** drop-down list will be displayed.

CPL      Jacket

Loan  
 Loan Purpose: Purchase      Closing Date: 1/18/2022      Sales Price: \$300,000.00  
 Loan Number: M-39895839      Loan Amount: \$250,000.00

Agency  
 Name: StewartAccess Test Agency  
 Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800

Jacket Options  
 Property Type: Residential - General

Jacket      Prior Policy       Simultaneous Issue

Jacket Type: Please Select a Policy Type  
 Loan  
 Commitment  
 Owners

Jacket Form:  
 Effective Date:

Liability: \$0.00  
 Premium: \$0.00      Remittance: \$0.00

Endorsements

View Jacket(s)      Get Jacket

Active Jacket(s)

Policy Number	Type	Status	Created Date

- The selections for jacket type depend on the state the property is located in. In this example, you can request a commitment, loan or owners jacket.
- However, if the property is located in Colorado for instance, you can also request a guarantee.

Jacket      Prior Policy       Simultaneous Issue

Jacket Type: Please Select a Policy Type  
 Loan  
 Commitment  
 Guarantee  
 Owners

Jacket Form:  
 Effective Date:

Liability: \$0.00  
 Premium: \$0.00      Remittance: \$0.00

Endorsements

View Jacket(s)      Get Jacket

- And in Texas, you can request a binder.

Jacket **Prior Policy**  Simultaneous Issue

Jacket Type: **Please Select a Policy Type**

Jacket Form: **Loan**

Effective Date: **Commitment**

Liability:

Premium:  Remittance:

- Select the desired jacket by clicking on it.

**CPL** **Jacket**

**Loan**

Loan Purpose: **Purchase** Closing Date: **1/18/2022** Sales Price: **\$300,000.00**

Loan Number: **M-39895839** Loan Amount: **\$250,000.00**

**Agency**

Name: **StewartAccess Test Agency**

Location: **StewartAccess Test Agency Inc - 1980 Post Oak Suite 800**

**Jacket Options**

Property Type: **Residential - General**

Jacket **Prior Policy**  Simultaneous Issue

Jacket Type: **Commitment**

Jacket Form: **ALTA Commitment 8-1-2016 - FL**

Effective Date: **5/3/2022**

Liability:

Premium:  Remittance:

**Active Jacket(s)**

Policy Number	Type	Status	Created Date

- Now select the jacket form that you want to request. If there is only one form associated with the jacket type selection, the **Jacket Form** field will default to that form. However, if there are multiple forms for the jacket type selected, select the jacket form that you want to request.
- Click on the down arrow  for the **Jacket Form** field. The **Jacket Form** drop-down list will be displayed.

The screenshot shows a software interface for managing loan jackets. The 'Jacket' section is active, showing a dropdown menu for 'Jacket Form' with 'ALTA Commitment 8-1-2016 - FL' selected. The 'Effective Date' field also shows the same text. Below the form, there are buttons for 'View Jacket(s)' and 'Get Jacket'. At the bottom, there is a table for 'Active Jacket(s)' with columns for Policy Number, Type, Status, and Created Date.

- Select the desired jacket form.

If a commitment is selected for the request, the **Effective Date** field will default to the current system (today's) date. It can be changed if necessary.

- To change the effective date, click in the **Effective Date** field and enter the desired date. You can also click on the calendar icon  and select a date from the pop-up calendar.

If a commitment was selected and the property is in a state that does not charge for a commitment, the **Liability** field will default to \$1000 and the **Premium** and **Remittance** fields will default to \$0.00. All three fields will be disabled and cannot be changed.

However, if the property is in a state that charges for a commitment, the **Liability** field will still default to \$1000 but it will be active and can be changed to the desired liability amount. The **Premium** and **Remittance** fields will also be active so that you can enter the premium amount being charged for the commitment as well as the associated remittance or underwriter fee.

**Note:** Depending on the size of the integration screen and your monitor’s resolution, you may have to scroll down to see all of the items pertaining to the jacket selection.

Endorsement do not apply to the commitment so if a commitment is being requested, the **Endorsements** button will be disabled.

If a commitment is being requested, no other options apply. You can now request the commitment.

- Click on the  button.
- The jacket requested, in this case a commitment, will be displayed on your screen as well as downloaded in PDF format to the location on your system specified in the **Digital Files Folder Path** field of the **Digital Files Access** setting under **Settings**. It will also be shown in the **Active Jacket(s)** list.

The screenshot displays a software interface for managing loans and jackets. It is divided into several sections:

- Loan:** Loan Purpose: Purchase, Closing Date: 1/18/2022, Sales Price: \$300,000.00, Loan Number: M-39895839, Loan Amount: \$250,000.00.
- Agency:** Name: StewartAccess Test Agency, Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800.
- Jacket Options:** Property Type: Residential - General.
- Jacket:** Includes tabs for Jacket and Prior Policy, a Simultaneous Issue checkbox, Jacket Type (Please Select a Policy Type), Jacket Form (Please Select a Jacket Form Type), Effective Date (5/3/2022), Liability (\$1,000.00), Premium (\$0.00), and Remittance (\$0.00). There is also an Endorsements button.
- Buttons:** View Jacket(s) and Get Jacket.
- Active Jacket(s) Table:**

	Policy Number	Type	Status	Created Date
Options	C-0000-724527892	Commitment	Active	5/3/2022

- You can request policy jackets separately if you wish. However, if you are issuing both a loan and owner’s policy for the transaction, you can request both jackets at the same time by clicking the **Simultaneous Issue** check box.

CPL
Jacket

**Loan**

Loan Purpose: Purchase    Closing Date: 1/18/2022    Sales Price: \$300,000.00

Loan Number: M-39895839    Loan Amount: \$250,000.00

**Agency**

Name: StewartAccess Test Agency    Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800

**Jacket Options**

Property Type: Residential - General

**Loan Policy**    **Owners Policy**    **Prior Policy**     Simultaneous Issue

Jacket Type: Loan

Jacket Form: ALTA Loan Policy - FL - 6-17-2006

Effective Date: 1/18/2022    15

Liability: \$250,000.00

Premium: \$25.00    Remittance: \$7.50

Endorsements

**Addl. Charge**    **Special Charge**    **Form Fields**

Remove	Additional Charge Type	Additional Fee

View Jacket(s)    Get Jacket

**Active Jacket(s)**

Options	Policy Number	Type	Status	Created Date
<span>Options</span>	<span>C-0000-724527892</span>	<span>Commitment</span>	<span>Active</span>	<span>5/3/2022</span>

- This will produce a second policy tab to enable you to select both policies for the request. The **Loan Policy** tab is for selecting the loan policy.
- The **Jacket Type** field defaults to **Loan**. There is no other selection.
- Select the loan policy that you would like to request by clicking on the down arrow ▼ for the **Jacket Form** field. The **Jacket Form** drop-down list will be displayed.

CPL
Jacket

**Loan**

Loan Purpose: [Purchase](#)      Closing Date: [1/18/2022](#)      Sales Price: [\\$300,000.00](#)

Loan Number: [M-39895839](#)      Loan Amount: [\\$250,000.00](#)

**Agency**

Name: [StewartAccess Test Agency](#)

Location: [StewartAccess Test Agency Inc - 1980 Post Oak Suite 800](#)

**Jacket Options**

Property Type: [Residential - General](#)

**Loan Policy**    [Owners Policy](#)    [Prior Policy](#)     Simultaneous Issue

Jacket Type: [Loan](#)

Jacket Form: [ALTA Loan Policy - FL - 6-17-2006](#)

Effective Date: [ALTA Short Form Residential Loan Policy - FL - 6-17-2006](#)

[ALTA Loan Policy - FL - 6-17-2006](#)

Liability: [ALTA Residential Limited Coverage Mortgage Modification Policy 12-1-2014 - FL](#)

Premium:       Remittance:

[Endorsements](#)

Addl. Charge
Special Charge
Form Fields

Remove	Additional Charge Type	Additional Fee

[View Jacket\(s\)](#)    [Get Jacket](#)

**Active Jacket(s)**

Options	Policy Number	Type	Status	Created Date
	<a href="#">C-0000-724527892</a>	<a href="#">Commitment</a>	<a href="#">Active</a>	<a href="#">5/3/2022</a>

- Click on the desired loan policy to select it.

CPL
Jacket

**Loan**

Loan Purpose: Purchase    Closing Date: 1/18/2022    Sales Price: \$300,000.00

Loan Number: M-39895839    Loan Amount: \$250,000.00

---

**Agency**

Name: StewartAccess Test Agency ▼

Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 ▼

---

**Jacket Options**

Property Type: Residential - General ▼

---

**Loan Policy**    **Owners Policy**    **Prior Policy**     Simultaneous Issue

Jacket Type: Loan ▼

Jacket Form: ALTA Loan Policy - FL - 6-17-2006 ▼

Effective Date: 1/18/2022 15

Liability: \$250,000.00

Premium: \$25.00    Remittance: \$7.50

Endorsements

---

Addl. Charge    
 Special Charge    
 Form Fields

Remove	Additional Charge Type	Additional Fee

---

View Jacket(s)    
 Get Jacket

---

**Active Jacket(s)**

Options	Policy Number	Type	Status	Created Date
	C-0000-724527892	Commitment	Active	5/3/2022

- The **Liability**, **Premium** and **Remittance** fields will be populated automatically with the appropriate information from the closing file and cannot be changed.
- If an effective date has been entered in the closing file for the policy type selected, that date will automatically populate the **Effective Date** field. Otherwise it will be populated with the closing or settlement date that was entered in the closing file. The date can be changed if necessary.
- To change the effective date, click in the **Effective Date** field and enter the desired date. You can also click on the calendar icon 15 and select a date from the pop-up calendar.

CPL
Jacket

**Loan**

Loan Purpose: Purchase    Closing Date: 1/18/2022    Sales Price: \$300,000.00

Loan Number: M-39895839    Loan Amount: \$250,000.00

**Agency**

Name: StewartAccess Test Agency

Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800

**Jacket Options**

Property Type: Residential - General

**Loan Policy**    **Owners Policy**    **Prior Policy**     Simultaneous Issue

Jacket Type: Loan

Jacket Form: ALTA Loan Policy - FL - 6-17-2006

Effective Date: 1/18/2022

Liability: January 2022

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Premium:     Remittance:    

Addl. Charge:

**Active Jacket(s)**

	Policy Number	Type	Status	Created Date
<input type="button" value="Options"/>	C-0000-724527892	Commitment	Active	5/3/2022

At the bottom of the policy screen, there are several tabs. This section enables you to enter additional information or charges for the jacket request. Only the tabs that pertain to the jacket type being requested and/or the state the property is located in will be active.

**Note:** You will need to scroll down to view these tabs.

If the property is in a state or jurisdiction that allows for additional charges, the **Addl. Charge** tab will be active.

CPL Jacket

Loan  
 Loan Purpose: Purchase Closing Date 1/18/2022 Sales Price: \$300,000.00  
 Loan Number: M-39895839 Loan Amount: \$250,000.00  
 Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800

Jacket Options  
 Property Type: Residential - General

Loan Policy Owners Policy Prior Policy  Simultaneous Issue

Jacket Type: Loan  
 Jacket Form: ALTA Loan Policy - FL - 6-17-2006  
 Effective Date: 1/18/2022  
 Liability: \$250,000.00  
 Premium: \$25.00 Remittance: \$7.50

Endorsements

Addl. Charge Special Charge Form Fields

Remove	Additional Charge Type	Additional Fee
	Surcharge	0.00

Add Charge

View Jacket(s) Get Jacket

Active Jacket(s)

Options	Policy Number	Type	Status	Created Date
	C-0000-724527892	Commitment	Active	5/3/2022

- To add an additional charge, click on the down arrow  for the charge descriptions drop-down list and select the desired charge.

Addl. Charge Special Charge Form Fields

Remove	Additional Charge Type	Additional Fee
	Surcharge	0.00

Add Charge

View Jacket(s) Get Jacket

- Enter the amount of the charge.

Addl. Charge		Special Charge	Form Fields
Remove	Additional Charge Type	Additional Fee	
	Surcharge	150.00	Add Charge
		View Jacket(s)    Get Jacket	

- Click on the **Add Charge** button. The charge will be added to the additional charge list.

Addl. Charge		Special Charge	Form Fields
Remove	Additional Charge Type	Additional Fee	
Remove	Surcharge	150.00	
		0.00	Add Charge
		View Jacket(s)    Get Jacket	

- Multiple charges can be entered. Repeat this process to add more charges.
- If you need to remove a charge, click on the **Remove** button. It will be removed from the list.

If the property is in a state that allows for special charges, the *Special Charge* tab will be active.

Addl. Charge		Special Charge	Form Fields
Remove	Trans Code	Actual Premi	Actual Remit
		0.00	0.00    Add Charge
		View Jacket(s)    Get Jacket	

- To add a special charge, click on the down arrow  for the charge descriptions drop-down list and select the desired charge.

Addl. Charge		Special Charge		Form Fields
Remove	Trans Code	Actual Premi	Actual Remit	
		0.00	0.00	Add Charge
	(8042)Commitment Issued to F.D.I.C. and O.T.S.Commitment to Highway Department; (8041)Commitment to Texas Department of Transportation (0050)Credit for Commitment Premium (0020)Foreclosure Credit.			

- Enter the premium for the charge in the **Actual Premium** field and the underwriter fee or remittance in the **Actual Remittance** field.

Addl. Charge		Special Charge		Form Fields
Remove	Trans Code	Actual Premi	Actual Remit	
	(8041)Commitment to	100.00	30.00	Add Charge
		View Jacket(s)		Get Jacket

- Click on the **Add Charge** button. The charge will be added to the special charge list.

Addl. Charge		Special Charge		Form Fields
Remove	Trans Code	Actual Premi	Actual Remit	
Remove	(8041)Commitment to Texa:	100.00	30.00	
		0.00	0.00	Add Charge
		View Jacket(s)		Get Jacket

- Multiple charges can be entered. Repeat this process to add more charges.
- If you need to remove a charge, click on the **Remove** button. It will be removed from the list.

If you are requesting a short form loan policy jacket, the **Form Fields** tab will become active. This will give you the opportunity to enter information needed for the short form policy.

Addl. Charge	Special Charge	Form Fields
Please select additional options for selected policy form...		
Addendum Attached		<input type="text"/>
Mortgage Amount		<input type="text" value="250000.00"/>
Mortgage Date		<input type="text" value="1/18/2022"/> <input type="text" value="15"/>
State Statutes		<input type="text"/>
Premium (for Sch A only)		<input type="text"/>
Policy Time Stamp		<input type="text"/>
Borrower Names and Vesting		<input type="text" value="James Johnson and Sara Johnson"/>
		<input type="button" value="View Jacket(s)"/> <input type="button" value="Get Jacket"/>

- Information that is available in the closing file will be populated automatically. Other information will need to be entered manually. Enter all information necessary for the short form loan policy.

**Note:** The form fields that are presented will depend on the state that the property is located in.

- To select the owner's policy jacket, click on the *Owners Policy* tab.

CPL      Jacket

Loan  
 Loan Purpose: **Purchase**      Closing Date: 1/18/2022      Sales Price: \$300,000.00  
 Loan Number: M-39895839      Loan Amount: \$250,000.00

Agency  
 Name: StewartAccess Test Agency  
 Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800

Jacket Options  
 Property Type: Residential - General

Loan Policy    Owners Policy    Prior Policy     Simultaneous Issue

Jacket Type: Owners  
 Jacket Form: ALTA Owners Policy - FL - 6-17-2006  
 Effective Date: 1/18/2022  
 Liability: \$300,000.00  
 Premium: \$1,330.00      Remittance: \$399.00  
 Endorsements

Addl. Charge    Special Charge    Form Fields

Remove	Additional Charge Type	Additional Fee

View Jacket(s)    Get Jacket

Active Jacket(s)

Options	Policy Number	Type	Status	Created Date
	C-0000-724527892	Commitment	Active	5/3/2022

- The **Jacket Type** defaults to **Owners**. There is no other selection.
- Select the owner’s policy that you would like to request by clicking on the down arrow  for the **Jacket Form** field. The **Jacket Form** drop-down list will be displayed.

CPL
Jacket

**Loan**

Loan Purpose: Purchase    Closing Date: 1/18/2022    Sales Price: \$300,000.00

Loan Number: M-39895839    Loan Amount: \$250,000.00

---

**Agency**

Name: StewartAccess Test Agency

Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800

---

**Jacket Options**

Property Type: Residential - General

---

Loan Policy
Owners Policy
Prior Policy
 Simultaneous Issue

Jacket Type: Owners

Jacket Form: ALTA Owners Policy - FL - 6-17-2006

Effective Date: ALTA Owners Policy - FL - 6-17-2006

ALTA U. S. Policy 12-3-2012

Liability: \$300,000.00

Premium: \$1,330.00    Remittance: \$399.00

Endorsements

---

Addl. Charge
Special Charge
Form Fields

Remove	Additional Charge Type	Additional Fee

View Jacket(s)    Get Jacket

---

**Active Jacket(s)**

	Policy Number	Type	Status	Created Date
Options	C-0000-724527892	Commitment	Active	5/3/2022

- Click on the desired owner's policy to select it.

CPL
Jacket

**Loan**

Loan Purpose: Purchase      Closing Date: 1/18/2022      Sales Price: \$300,000.00

Loan Number: M-39895839      Loan Amount: \$250,000.00

---

**Agency**

Name: StewartAccess Test Agency

Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800

---

**Jacket Options**

Property Type: Residential - General

---

Loan Policy
Owners Policy
Prior Policy
 Simultaneous Issue

Jacket Type: Owners

Jacket Form: ALTA Owners Policy - FL - 6-17-2006

Effective Date: 1/18/2022 15

Liability: \$300,000.00

Premium: \$1,330.00      Remittance: \$399.00

Endorsements

---

Addl. Charge
Special Charge
Form Fields

Remove	Additional Charge Type	Additional Fee

View Jacket(s)
Get Jacket

---

**Active Jacket(s)**

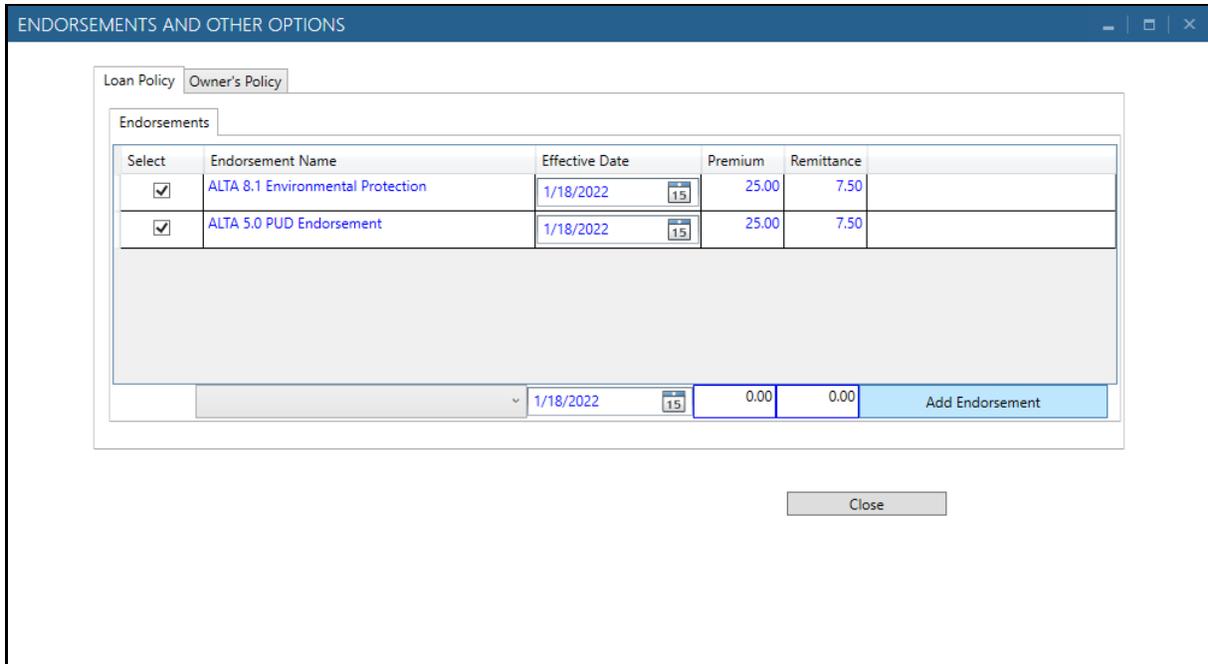
Options	Policy Number	Type	Status	Created Date
	C-0000-724527892	Commitment	Active	5/3/2022

- The **Liability**, **Premium** and **Remittance** fields will be populated automatically with the appropriate information from the closing file and cannot be changed.
- If an effective date has been entered in the closing file for the policy type selected, that date will automatically populate the **Effective Date** field. Otherwise it will be populated with the closing or settlement date that was entered in the closing file. The date can be changed if necessary.
- To change the effective date, click in the **Effective Date** field and enter the desired date. You can also click on the calendar icon 15 and select a date from the pop-up calendar.
- As with the loan policy, the same tabs are available for the owner's policy to enter additional or special charges. Enter any additional or special charges that may apply to the owner's policy request.

**Note:** Form fields do not apply to an owner’s policy and therefore the *Form Fields* tab will never be active for an owner’s policy jacket request.

If you are requesting a loan or owners policy jacket, the *Endorsements* button will be active so that you can review and/or select endorsements to be submitted with the jacket request.

- Click on the **Endorsements** button. The *Endorsements and Other Options* dialog box will be displayed.



If you are using the *Simultaneous Issue* function to request both the loan and owner’s policy together, you will see tabs for both policies. If you are requesting the policies separately, you will only see the endorsements for the policy jacket that you are requesting.

If endorsements were entered in the closing file, they will be shown here and automatically selected as indicated by a check mark in the *Select* column for each endorsement. If these are the endorsements that you want to send with the request, then nothing needs to be done. You can simply close this dialog box and proceed to requesting the jacket.

However, you have the opportunity to modify, delete or add an endorsement if necessary.

- If you do not want to include a particular endorsement in the request, uncheck the check box in the *Select* column for the endorsement that you want to remove.
- If you need to modify an endorsement, click in the field that you want to change and enter the desired information. The effective date, premium and remittance can all be changed.

- If you need to add an endorsement, click on the down arrow  for the endorsements drop-down list. The available endorsements for the policy being requested will be displayed.

ENDORSEMENTS AND OTHER OPTIONS

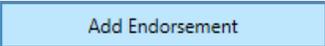
Loan Policy Owner's Policy

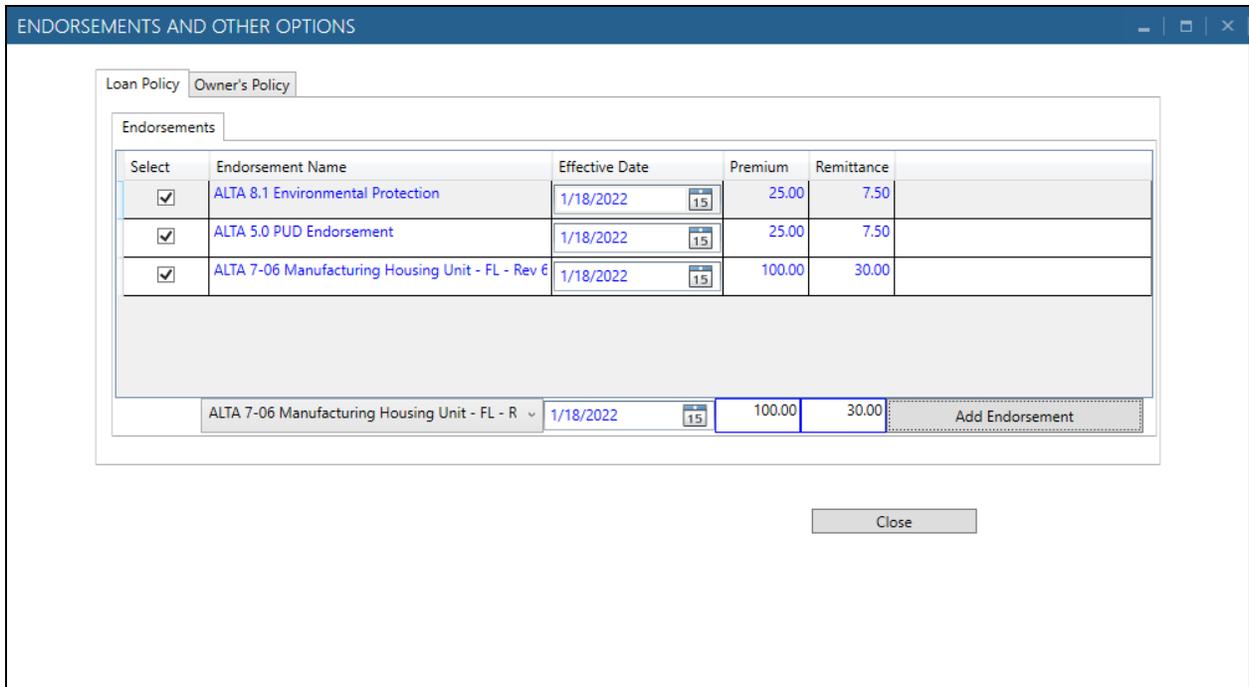
Endorsements

Select	Endorsement Name	Effective Date	Premium	Remittance	
<input checked="" type="checkbox"/>	ALTA 8.1 Environmental Protection	1/18/2022 	25.00	7.50	
<input checked="" type="checkbox"/>	ALTA 5.0 PUD Endorsement	1/18/2022 	25.00	7.50	
		1/18/2022 	0.00	0.00	Add Endorsement

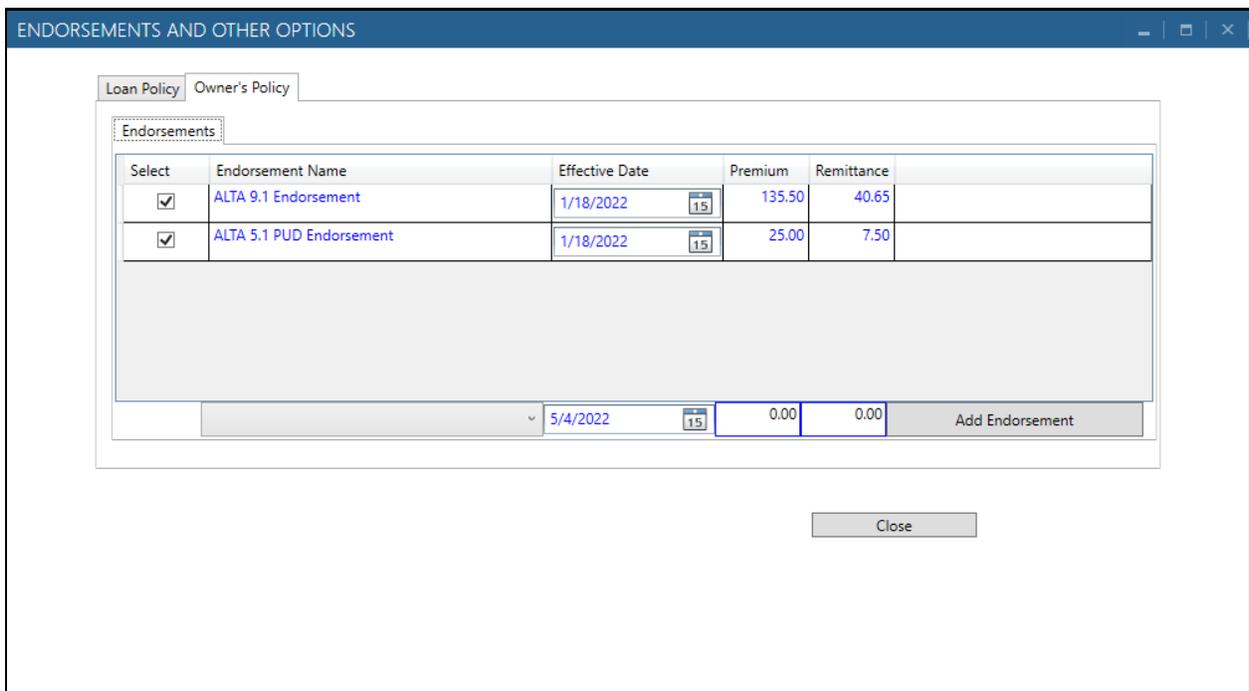
Close

ALTA 14-06 Future Advance - Priority - FL - Rev 12-1-2013  
 ALTA 5.1-06 Planned Unit Development - FL - Rev 6-17-2006  
 ALTA 8.1-06 Environmental Protection Lien - FL - 6-17-2006  
 ALTA 9-06 Restrictions, Encroachments, Minerals - FL - 12-1-2013  
 ALTA 10-06 Assignment - FL - Rev 12-1-2013  
 ALTA 11-06 Mortgage Modification - FL - Rev 6-17-2006  
 ALTA 12-06 Aggregation - FL - Rev 4-2-2013  
 ALTA 13.1-06 Leasehold - Loan - FL - Rev 6-17-2006  
 ALTA 14.2-06 Future Advance - Letter of Credit - FL - Rev 12-1-2013  
 ALTA 14.3-06 Future Advance - Reverse Mortgage - FL - Rev 12-1-2013  
 ALTA 23.1-06 Co-Insurance - Multiple Policies FL Rev 8-1-2017  
 ALTA 4.1-06 Condominium - FL - Rev 6-17-2006  
 ALTA 5.1-06 Planned Unit Development - FL - Rev 6-1-1987  
 ALTA 6-06 Variable Rate Mortgage - FL - Rev 6-17-2006  
 ALTA 6.2-06 Variable Rate Mortgage - Negative Amort - FL - Rev 6-17-2006  
 ALTA 7-06 Manufacturing Housing Unit - FL - Rev 6-17-2006  
 ALTA 9.3-06 Restrictions, Encroachments, Minerals - FL - 6-17-06  
 FL Additional Interest

- Select the desired endorsement by clicking on it.
- Enter the effective date, premium and remittance for the endorsement in the appropriate fields.
- Click the  button to add the endorsement. It will be displayed in the list and automatically selected.



- If you are using the simultaneous issue function and you have a tab for the owner's policy, click on the **Owner's Policy** tab and review the endorsements for the owner's policy jacket request. As with the loan policy, you can modify, delete or add endorsements.



- Click Close to close the **Endorsements and Other Options** dialog box.

If you are requesting a loan or owner policy jacket and a reissue credit is being given for the new policy being issued, you can search Stewart Title’s system to see if a prior policy had previously been issued through the Stewart Title underwriter service.

- To do so, click on the **Prior Policy** tab.

The screenshot displays a web application interface for Stewart Title. At the top, there are two tabs: 'CPL' and 'Jacket'. The 'Jacket' tab is selected. Below the tabs, there are several sections:

- Loan:** Loan Purpose: Purchase, Closing Date: 1/18/2022, Sales Price: \$300,000.00, Loan Number: M-39895839, Loan Amount: \$250,000.00.
- Agency:** Name: StewartAccess Test Agency, Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800.
- Jacket Options:** Property Type: Residential - General.
- Original Jacket Section:** This section has two tabs: 'Jacket' and 'Prior Policy'. The 'Prior Policy' tab is selected. It contains:
  - File Number: [input field]
  - Original Jacket: [dropdown menu]
  - OPN: [input field]
  - Liability: [input field]
  - Effective Date: Select a date [calendar icon]
  - Buttons: Search, Clear, Toggle.
- Action Buttons:** View Jacket(s), Get Jacket.
- Active Jacket(s) Table:** A table with columns: Policy Number, Type, Status, Created Date. The table is currently empty.

- In the **Original Jacket** section, enter the **Landtech** filename or number associated with the prior policy jacket.

CPL
Jacket

**Loan**

Loan Purpose: Purchase    Closing Date: 1/18/2022    Sales Price: \$300,000.00

Loan Number: M-39895839    Loan Amount: \$250,000.00

**Agency**

Name: StewartAccess Test Agency ▼

Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 ▼

**Jacket Options**

Property Type: Residential - General ▼

Jacket
Prior Policy
 Simultaneous Issue

**Original Jacket**

File Number: 20210121 Search

Original Jacket:   ▼ Clear

OPN:      Liability:   Toggle

Effective Date: Select a date 15

View Jacket(s)
Get Jacket

**Active Jacket(s)**

	Policy Number	Type	Status	Created Date

- Click the Search button. The results will be displayed in the *Original Jacket* drop-down list.
- Click on the down arrow ▼ for the *Original Jacket* field. The *Original Jacket* drop-down list will be displayed.

CPL
Jacket

**Loan**

Loan Purpose: Purchase    Closing Date: 1/18/2022    Sales Price: \$300,000.00

Loan Number: M-39895839    Loan Amount: \$250,000.00

**Agency**

Name: StewartAccess Test Agency ▼

Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 ▼

**Jacket Options**

Property Type: Residential - General ▼

Simultaneous Issue

**Original Jacket**

File Number:  Search

Original Jacket: ▼ Clear

OPN: Loan-M-0000-661707441-ALTA Loan Policy - FL - 6-17-2006

Effective Date: select a date 19

View Jacket(s)
Get Jacket

**Active Jacket(s)**

	Policy Number	Type	Status	Created Date

- Select the desired prior policy jacket. The information for that policy jacket will populate the associated fields.

CPL
Jacket

---

**Loan**

Loan Purpose: Purchase      Closing Date: 1/18/2022      Sales Price: \$300,000.00

Loan Number: M-39895839      Loan Amount: \$250,000.00

---

**Agency**

Name: StewartAccess Test Agency ▼

Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 ▼

---

**Jacket Options**

Property Type: Residential - General ▼

---

Jacket
Prior Policy
 Simultaneous Issue

---

**Original Jacket**

File Number:  Search

Original Jacket: Owners-O-0000-661054261-ALTA Owners Policy - I ▼ Clear

OPN:       Liability:  Toggle

Effective Date:  15

---

View Jacket(s)
Get Jacket

---

**Active Jacket(s)**

Policy Number	Type	Status	Created Date

This prior policy information will be submitted with the jacket request as proof of a prior policy for the reissue credit.

- You can clear your selection if necessary by clicking the Clear button.

If the prior policy jacket does not exist in the Stewart system, but you entered prior policy information in the **Landtech** closing file, you can use that prior policy information.

- Click on the Toggle button.

CPL
Jacket

Loan

Loan Purpose: Purchase    Closing Date: 1/18/2022    Sales Price: \$300,000.00

Loan Number: M-39895839    Loan Amount: \$250,000.00

Agency

Name: StewartAccess Test Agency ▼

Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 ▼

Jacket Options

Property Type: Residential - General ▼

Jacket
Prior Policy
 Simultaneous Issue

Original Jacket

File Number:  Search

Original Jacket:  Clear

OPN: O-2882948534    Liability: \$350,000.00 Toggle

Effective Date: 6/20/2009 (Owners)

View Jacket(s)
Get Jacket

Active Jacket(s)

Policy Number	Type	Status	Created Date

The policy number, liability and effective date will be displayed with an indicator as to what type of policy it is. The owner's policy is presented by default.

- If there is prior loan policy and you would like to select that, click on the Toggle button again and the loan policy information will be displayed.

If you are using the simultaneous issue function to request the loan and owner's policy jackets together, there will be an additional check box labeled ***Apply to Owners***.

CPL
Jacket

**Loan**

Loan Purpose: Purchase    Closing Date: 1/18/2022    Sales Price: \$300,000.00

Loan Number: M-39895839    Loan Amount: \$250,000.00

**Agency**

Name: StewartAccess Test Agency ▼

Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800 ▼

**Jacket Options**

Property Type: Residential - General ▼

Loan Policy
Owners Policy
Prior Policy
 Simultaneous Issue

**Original Jacket**

File Number:  Search

Original Jacket:   ▼ Clear

OPN: O-2882948534    Liability: \$350,000.00 Toggle

Effective Date: 6/20/2009 15  Apply to Owners (Owners)

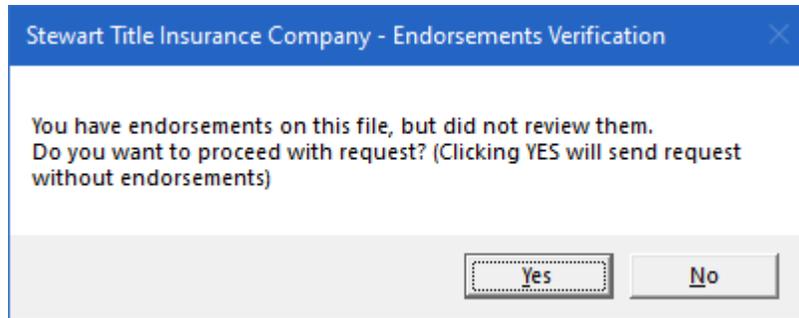
View Jacket(s)
Get Jacket

**Active Jacket(s)**

	Policy Number	Type	Status	Created Date
Options	C-0000-724527892	Commitment	Active	5/3/2022

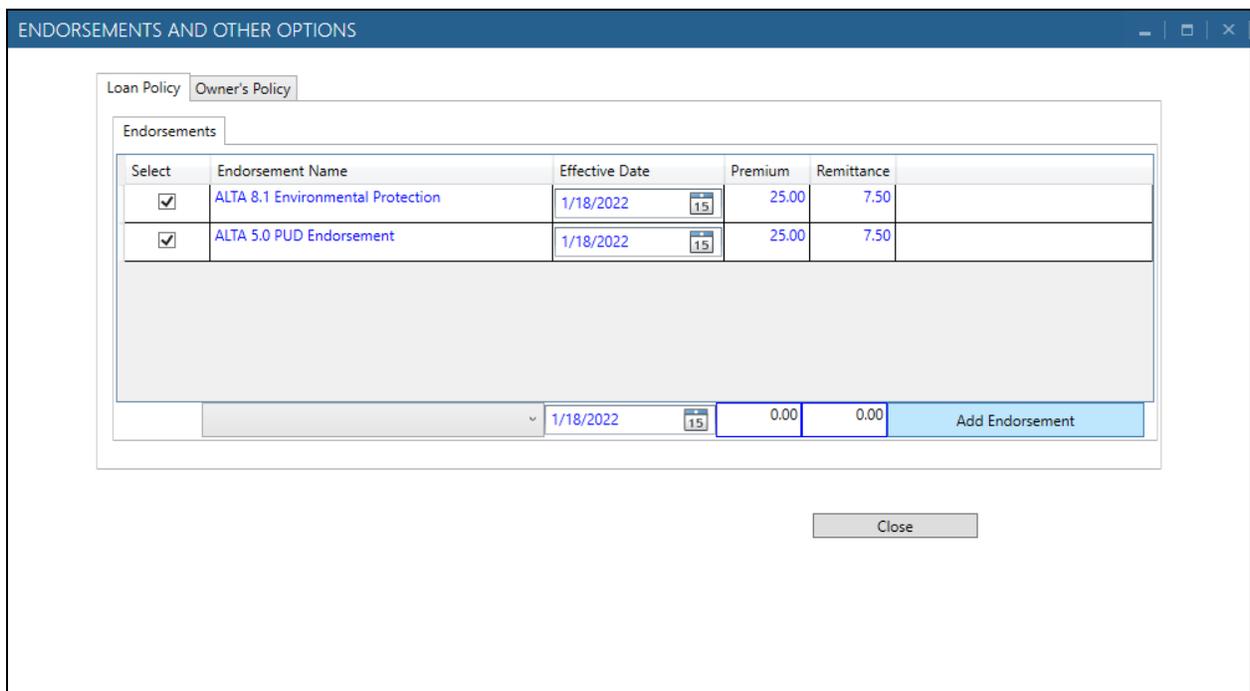
- This enables you to specify which policy is receiving the reissue credit. If it is the owner's policy, check the ***Apply to Owners*** check box. If it is the loan policy, leave the check box blank.
- You are now ready to request the jacket or jackets. Click on the Get Jacket button.

If you had entered endorsements in the closing file but did not review them prior to the jacket request, you will see this message.



This message is warning you that you have endorsements entered in the closing file but you did not review them prior to the jacket request. You can proceed if you want but be aware that the endorsements will not be submitted with the jacket request.

- Click  if you want to proceed with the jacket request without submitting any endorsements.
- Click  if you want to review or add additional endorsements prior to sending the jacket request. The *Endorsements and Other Options* dialog box will be displayed.



- After you have reviewed the endorsements, click the  button to close the *Endorsements and Other Options* dialog box.
- Then click the  button again.

If an endorsement that is being submitted does not match any of the endorsements in the Stewart system, you will see a dialog box requesting user input.

USER INPUT REQUIRED

Additional information is needed. Please select answers to the following questions and re-submit your order.

Questions

ALTA 9.1-06 Restrictions, Encroachments, Minerals - FL - Rev 12-1-2013

91-Form 9.1

Submit Cancel

The endorsement that is being submitted that does not match will be displayed along with a drop-down list of endorsements that are in the Stewart system. You will need to select the endorsement that is the best match for the endorsement that you are submitting.

- Click on the down arrow  for the endorsement selections to display the available endorsements.

USER INPUT REQUIRED

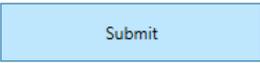
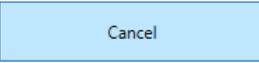
Additional information is needed. Please select answers to the following questions and re-submit your order.

Questions

ALTA 9.1-06 Restrictions, Encroachments, Minerals - FL - Rev 12-1-2013

91-Form 9.1  
91-Form 9.1  
95-ALTA 9.5-06 Restrictions, Minerals - Owner Policy - Improved  
92-Form 9.2

Submit Cancel

- Click on the desired endorsement.
- Click on the  button to continue the jacket request.
- Or if necessary, you can click  to cancel the jacket request so that you can adjust or modify the endorsement.
- Once the jacket or jackets have been received, they will show in the *Active Jackets(s)* list. In addition, they will be displayed on your screen as well as downloaded in PDF format to the location on your system specified in the *Digital Files Folder Path* field of the *Digital Files Access* setting under Settings.

CPL      Jacket

Loan  
 Loan Purpose: [Purchase](#)      Closing Date: [1/18/2022](#)      Sales Price: [\\$300,000.00](#)  
 Loan Number: [M-39895839](#)      Loan Amount: [\\$250,000.00](#)

Agency  
 Name: [StewartAccess Test Agency](#)  
 Location: [StewartAccess Test Agency Inc - 1980 Post Oak Suite 800](#)

Jacket Options  
 Property Type: [Residential - General](#)

Loan Policy    Owners Policy    Prior Policy     Simultaneous Issue

Jacket Type: [Please Select a Policy Type](#)  
 Jacket Form: [Please Select a Jacket Form Type](#)

Effective Date: [1/18/2022](#)

Liability:   
 Premium:       Remittance:

[Endorsements](#)

[View Jacket\(s\)](#)    [Get Jacket](#)

Active Jacket(s)

	Policy Number	Type	Status	Created Date
<a href="#">Options</a>	<a href="#">C-0000-724527892</a>	<a href="#">Commitment</a>	<a href="#">Active</a>	<a href="#">5/3/2022</a>
<a href="#">Options</a>	<a href="#">M-0000-725685841</a>	<a href="#">Loan Policy</a>	<a href="#">Active</a>	<a href="#">5/9/2022</a>
<a href="#">Options</a>	<a href="#">O-0000-725682121</a>	<a href="#">Owner Policy</a>	<a href="#">Active</a>	<a href="#">5/9/2022</a>

- There are several functions that can be performed on jackets. Clicking on the [Options](#) button will display the functions available for the jackets.

Active Jacket(s)

	Policy Number	Type	Status	Created Date
<a href="#">Options</a>	<a href="#">C-0000-724527892</a>	<a href="#">Commitment</a>	<a href="#">Active</a>	<a href="#">5/3/2022</a>
<a href="#">Options</a>	<a href="#">M-0000-725685841</a>	<a href="#">Loan Policy</a>	<a href="#">Active</a>	<a href="#">5/9/2022</a>
<a href="#">Options</a>	<a href="#">O-0000-725682121</a>	<a href="#">Owner Policy</a>	<a href="#">Active</a>	<a href="#">5/9/2022</a>

 View Jacket

 Download Jacket

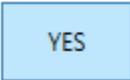
 Void Jacket

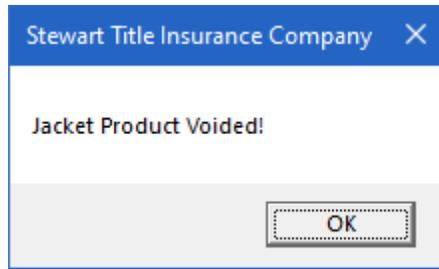
 Edit Jacket

- You can view a jacket, download a copy of a jacket, void a jacket and edit a jacket.

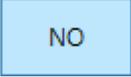
- To view a jacket, click on **View Jacket**. The jacket will be displayed on your screen in PDF format.
- If for some reason you need another copy of a jacket, you can get one by clicking on **Download Jacket**. This will download the jacket to your system and display it in PDF format on your screen.
- If it becomes necessary to void a jacket, you can do so by clicking on **Void Jacket**. In order to void a jacket, you will need to provide a reason for the void. Therefore, you will be prompted to select a reason.

- Select a reason from the **Reason** drop-down list.

- Click  to complete the void. You will see a confirmation that the jacket has been voided.



- The jacket will no longer be shown in the **Active Jacket(s)** list.

- Click  if you change your mind and do not want to void the jacket.

You can edit a jacket if necessary. If you just want to update some information related to the policy jacket such as the liability, premium or effective date, it is not necessary to void the current jacket and request a new jacket. You can accomplish this with the edit jacket function.

- Click on the **Edit Jacket** selection. The **Jacket** tab will load with the policy jacket that was selected for editing.

Jacket Prior Policy  Simultaneous Issue

Jacket Type: Loan

Jacket Form: ALTA Loan Policy - FL - 6-17-2006

Effective Date: 1/18/2022

Liability: \$250,000.00

Premium: \$25.00 Remittance: \$7.50

Endorsements

View Jacket(s) Get Jacket

Active Jacket(s)

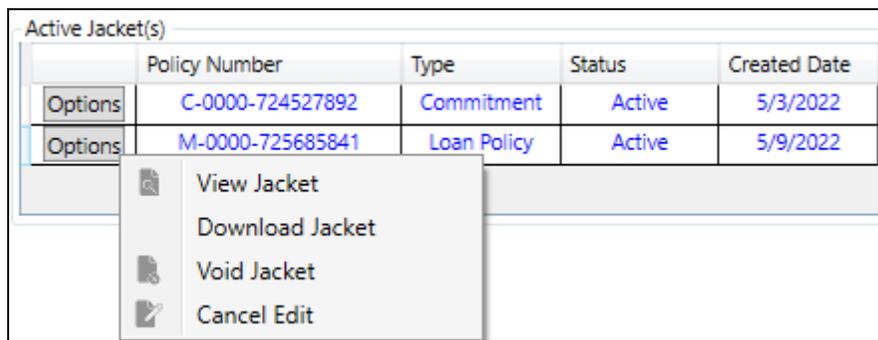
	Policy Number	Type	Status	Created Date
<span>Options</span>	C-0000-724527892	Commitment	Active	5/3/2022
<span>Options</span>	M-0000-725685841	Loan Policy	Active	5/9/2022

Notice that the jacket type and jacket form selections are disabled. That is because you are editing an existing jacket, not requesting a new jacket. Therefore, you cannot change those selections.

You also cannot edit endorsements when editing a jacket. Therefore the endorsements button is disabled. Endorsements can only be modified using the post policy endorsements function that will be explained next.

Information that can be revised are the effective date, property type, agency location, prior policy information, liability, premium, remittance and if revising a short form loan policy, the form fields. If the liability, premium and/or remittance need to be updated, that information must be changed in the closing file prior to accessing the Stewart Title underwriter service. Those fields cannot be edited in the integration.

- Make the necessary changes and click the  button. The policy jacket will be re-issued with the same policy number but updated with the new information.
- If you decide you do not want to edit the jacket, you can select **Cancel Edit** from the **Options** selections.



Active Jacket(s)				
	Policy Number	Type	Status	Created Date
Options	C-0000-724527892	Commitment	Active	5/3/2022
Options	M-0000-725685841	Loan Policy	Active	5/9/2022

- View Jacket
- Download Jacket
- Void Jacket
- Cancel Edit

- The **Jacket** tab will exit the edit mode and return to jacket request mode.

If the property is in a state that charges for CPLs, the **Edit CPL Fee** button will become active upon the completion of the jacket request.

CPL
Jacket

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Loan

Loan Purpose: [Purchase](#)    Closing Date: [1/18/2022](#)    Sales Price: [\\$300,000.00](#)

Loan Number: [M-39895839](#)    Loan Amount: [\\$250,000.00](#)

---

Agency

Name: [StewartAccess Test Agency](#)

Location: [StewartAccess Test Agency Inc - 1980 Post Oak Suite 800](#)

---

Jacket Options

Property Type: [Residential - General](#)

---

Jacket    [Prior Policy](#)     Simultaneous Issue

Jacket Type: [Please Select a Policy Type](#)

Jacket Form: [Please Select a Jacket Form Type](#)

Effective Date: [1/18/2022](#)

Liability:

Premium:     Remittance:

[Endorsements](#)

---

[View Jacket\(s\)](#)    [Get Jacket](#)

---

Active Jacket(s)

	Policy Number	Type	Status	Created Date
<a href="#">Options</a>	<a href="#">M-0000-729541591</a>	<a href="#">Loan Policy</a>	<a href="#">Active</a>	<a href="#">5/19/2022</a>

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[PPE](#)    [Edit CPL Fee](#)    [View All](#)    [Close](#)

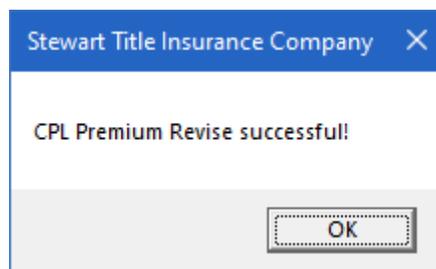
This will enable you to revise the premiums for the CPLs if necessary.

- Click on the [Edit CPL Fee](#) button, The *Edit CPL Fees* dialog box will be displayed showing all active CPLs for the transaction.

EDIT CPL FEES

CPL #:	725848997	Fee:	25.00	Remittance:	25.00	Revise
CPL #:	729533067	Fee:	25.00	Remittance:	25.00	Revise

- Click in the ***Fee*** and ***Remittance*** fields and enter the desired fee for the CPL.
- Click . You will see a confirmation that the premium revision was successful.



- Click  to continue.
- Close the ***Edit CPL Fees*** dialog box by clicking on the **X** in the title bar of the dialog box.
- You can view all jackets that have been requested for the transaction whether active or void by clicking the  button. This will display the ***Jackets Window*** dialog box.

Action	Policy Number	Type	Status	Created Date
<a href="#">View</a>	O-0000-725745551	Owner Policy	Active	5/9/2022 4:52:09 I
<a href="#">View</a>	M-0000-725685841	Loan Policy	Active	5/9/2022 11:28:52
<a href="#">View</a>	C-0000-724527892	Commitment	Active	5/3/2022 10:26:09
<a href="#">View</a>	O-0000-725682121	Owner Policy	Void	5/9/2022 11:28:53
<a href="#">View</a>	C-0000-698928791	Commitment	Void	3/24/2022 5:29:31

- You can view an active jacket by clicking on the **View** link. It will be displayed on your screen in PDF format.
- Void or inactive jackets cannot be viewed and therefore the **View** link is disabled for those jackets.
- Click  to close the **Jackets Window** dialog box.

You can view all CPLs and policy jackets that have been requested for the transaction by clicking on the  button. This will display the **All Documents** dialog box. This will provide you with a history of all title products requested for the transaction.

All Documents
×

CPL

Action	Reference #	Status	Type	Created Date
<a href="#">View</a>	696055157	Active	Buyer/Borrower CPL	3/18/2022 3:10:32 PM
<a href="#">View</a>	699456869	Void	Lender CPL	3/25/2022 3:12:23 PM
<a href="#">View</a>	696059926	Void	Lender CPL	3/18/2022 3:02:57 PM

Jackets

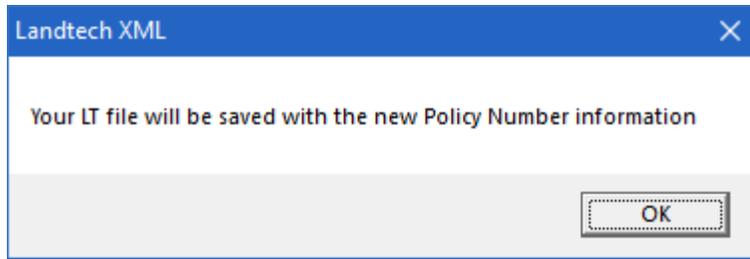
Action	Policy Number	Status	Type	Created Date
<a href="#">View</a>	O-0000-725745551	Active	Owner Policy	5/9/2022 4:52:09 PM
<a href="#">View</a>	M-0000-725685841	Active	Loan Policy	5/9/2022 11:28:52 AM
<a href="#">View</a>	C-0000-724527892	Active	Commitment	5/3/2022 10:26:09 AM
<a href="#">View</a>	O-0000-725682121	Void	Owner Policy	5/9/2022 11:28:53 AM
<a href="#">View</a>	C-0000-698928791	Void	Commitment	3/24/2022 5:29:31 PM

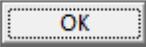
- You can view an active product by clicking on the **View** link. Voided products cannot be viewed.
- Click  to close the *All Documents* dialog box.

## Closing the Stewart Underwriter Service

When you have finished requesting title products, click the  button to close the Stewart Title underwriter service.

If you have requested title policy jackets, you will see the following message upon returning to the *Landtech* closing file.



- Click  to continue. The policy numbers will be imported into the appropriate fields on the **Title Insurance** dialog box in the **Landtech** closing file.

## Post Policy Endorsements

There may be times when it becomes necessary to add, modify or delete endorsements associated with a previously issued jacket. The Stewart Title underwriter service provides a way to do this.

- Open the **Landtech** closing file that the policy jacket was issued under.
- Launch the Stewart Title underwriter service.

Landtech Stewart Title Insurance Company Integration (2.0.1.27). LT-File: 20210178



[Stewart Title Insurance Company Web Site](#)  
[Landtech Title Insurance and Endorsements](#)

**File**  
File Number: 20210178    Login ID: LTUser1@dev.picdev.local

**Property**  
Property Type: Residential (1-4 family)  
Address 1: 1234 Main Street  
Address 2:  
State: FL    City: Wellington    Zip: 33414  
County: Palm Beach  
Legal Desc: Lot 79, Block 120, Ocean View Subdivision, Palm Beach County, Florida.

**Lender Information**  
Name: Bank of America  
Address 1: 7105 Corporate Drive  
Address 2:  
City: Plano    State: TX    Zip: 75024-4100  
Lender Clause: Its successors and/or assigns

**Agent Information**  
Name: Titles R Us    Contact: Steve Vogt  
Address 1: 1000 Main Street    Address 2:  
City: Royal Palm Beach    State: Florida    Zip: 33411  
Email: cclosings@titlesrus.com    Phone: 5615559928    Fax: 5615553988

**Borrower**

Party Type	Last Name	First Name	Middle Name	Company Name	Long Name	Status
INDIVIDUAL	Johnson	James				
INDIVIDUAL	Johnson	Sara				his wife
INDIVIDUAL	Harper	Charles				
INDIVIDUAL	Harper	Jane				his wife

**Seller**

Party Type	Last Name	First Name	Middle Name	Company Name	Long Name	Status
INDIVIDUAL	Williams	Bill				
INDIVIDUAL	Williams	Nancy				his wife
INDIVIDUAL	Bennett	Robert				
INDIVIDUAL	Bennett	Sally				his wife

**CPL**    Jacket

**Loan**  
Loan Purpose: Purchase    Closing Date: 1/18/2022    Sales Price: \$300,000.00  
Loan Number: M-39895839    Loan Amount: \$250,000.00

**Agency**  
Name: StewartAccess Test Agency  
Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800  
Branch: Include All Branches

**CPL Options**  
Type:  Lender     Buyer     Seller  
CPL Form: FL Closing Protection Letter  
Effective Date: 5/19/2022  
Lender Clause: Its successors and/or assigns as their interests may appear.  
Attention:  
 Search Approved Attorney  
 Search Secondary Agency  
 Search Settlement Company

View CPL(s)    Get CPL

**Active CPL(s)**

Options	CPL Number	Type	Status	Created Date
<input type="checkbox"/>	729699997	Lender CPL	Active	5/19/2022

PPE    Edit CPL Fee    View All    Close

Version: 2.0.1.27

- Click the **PPE** button at the bottom of the dialog box. The **Post Policy Endorsements** dialog box will be displayed.

POST-POLICY ENDORSEMENTS

Original Jacket

Original Jacket:

OPN:  Liability:

Effective Date:

Jacket

Endorsements

Select	Endorsement Name	Effective Date	Premium	Remittance
<input type="checkbox"/>		<input type="text" value="5/11/2022"/> <input type="text" value="15"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

- Select the policy jacket that you want to modify by clicking on the down arrow  for the **Original Jacket** field. The **Original Jacket** drop-down list will be displayed containing the policy jackets issued for the transaction.

POST-POLICY ENDORSEMENTS

Original Jacket

Original Jacket:

OPN:

Effective Date:

Jacket

Endorsements

Select	Endorsement Name	Effective Date	Premium	Remittance
<input type="checkbox"/>		<input type="text" value="5/11/2022"/> <input type="text" value="15"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>



POST-POLICY ENDORSEMENTS

Original Jacket

Original Jacket:

OPN:  Liability:

Effective Date:

Jacket

Endorsements

Select	Endorsement Name	Effective Date	Premium	Remittance
<input checked="" type="checkbox"/>	ALTA 5.1-06 Planned Unit Development - FL - Rev 6-17-2006	<input type="text" value="1/21/2022"/>	25.00	7.50
<input checked="" type="checkbox"/>	ALTA 9.1-06 Restrictions, Encroachments, Minerals	<input type="text" value="1/21/2022"/>	135.50	40.65
		<input type="text" value="1/21/2022"/>	0.00	0.00

- ALTA 4.1-06 Condominium - FL - Rev 6-17-2006
- ALTA 5.1-06 Planned Unit Development - FL - Rev 6-17-2006
- ALTA 7-06 Manufacturing Housing Unit - FL - Rev 6-17-2006
- ALTA 9.1-06 Restrictions, Encroachments, Minerals - FL - Rev 12-1-2013
- FL Survey
- ALTA 13-06 Leasehold - Owners - FL - Rev 6-17-2006
- ALTA 23.1-06 Co-Insurance - Multiple Policies FL Rev 8-1-2017
- ALTA 5.1-06 Planned Unit Development - FL - Rev 6-1-1987
- ALTA 9.2-06 Restrictions, Encroachments, Minerals - Imprvd Land - FL - 12-1-2013
- FL Change of Partners - Members - Shareholders
- FL Contiguity
- FL Navigational Servitude
- FL Option
- FL Owner - General

- Select the desired endorsement by clicking on it.

POST-POLICY ENDORSEMENTS

Original Jacket

Original Jacket: Owners-O-0000-725745551-ALTA Owners Policy - FL - 6-17-2

OPN: 725745551 Liability: \$300,000.00

Effective Date: 1/21/2022

Jacket

Endorsements

Select	Endorsement Name	Effective Date	Premium	Remittance
<input checked="" type="checkbox"/>	ALTA 5.1-06 Planned Unit Development - FL - Rev	1/21/2022	25.00	7.50
<input checked="" type="checkbox"/>	ALTA 9.1-06 Restrictions, Encroachments, Minerals	1/21/2022	135.50	40.65

ALTA 7-06 Manufacturing Housing Unit - FL - R 1/21/2022 100.00 30.00 Add Endorsement

Submit Changes Cancel

- The effective date defaults to the policy effective date. It can be changed if necessary. To change it, click in the **Effective Date** field and enter the date or click on the calendar icon  and select a date from the pop-up calendar.
- Click in the **Premium** field and enter the premium being charged for the endorsement.
- Click in the **Remittance** field and enter the remittance or underwriter fee for the endorsement.
- Click the  button to add the endorsement. It will be displayed in the list and automatically selected.

POST-POLICY ENDORSEMENTS

Original Jacket

Original Jacket:

OPN:  Liability:

Effective Date:

Jacket

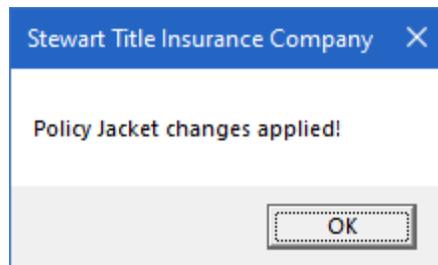
Endorsements

Select	Endorsement Name	Effective Date	Premium	Remittance
<input checked="" type="checkbox"/>	ALTA 5.1-06 Planned Unit Development - FL - Rev 6	1/21/2022	25.00	7.50
<input checked="" type="checkbox"/>	ALTA 9.1-06 Restrictions, Encroachments, Minerals	1/21/2022	135.50	40.65
<input checked="" type="checkbox"/>	ALTA 7-06 Manufacturing Housing Unit - FL - Rev 6	1/21/2022	100.00	30.00

ALTA 7-06 Manufacturing Housing Unit - FL - R | 1/21/2022 | 100.00 | 30.00 | Add Endorsement

Submit Changes | Cancel

- Click the  button to submit the endorsement. You will receive confirmation that the change to the policy jacket was applied successfully.



- Click  to continue. You will be returned to the *Post Policy Endorsement* dialog box.
- If you need to delete an endorsement, you can do so by unchecking the check box in the *Select* column for the endorsement that you want to delete.

POST-POLICY ENDORSEMENTS

Original Jacket

Original Jacket: Loan-M-0000-725685841-ALTA Loan Policy - FL - 6-17-2006

OPN: 725685841 Liability: \$250,000.00

Effective Date: 1/21/2022

Jacket

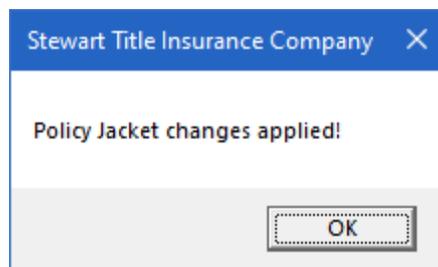
Endorsements

Select	Endorsement Name	Effective Date	Premium	Remittance
<input checked="" type="checkbox"/>	ALTA 5.1-06 Planned Unit Development - FL - Rev E	1/18/2022	25.00	7.50
<input type="checkbox"/>	ALTA 5.1-06 Environmental Protection Lien - FL - B	1/18/2022	25.00	7.50

1/18/2022 100.00 30.00 Add Endorsement

Submit Changes Cancel

- To complete the deletion, click on the **Submit Changes** button. You will receive confirmation that the policy changes were applied successfully.



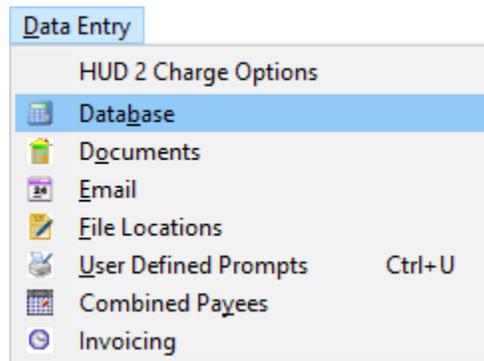
- You can also modify an existing endorsement. You can change the effective date, the premium and/or the remittance. Once you have made the changes, click on the **Submit Changes** button. Once again you will receive confirmation that the changes were applied successfully.
- When you have finished with the post policy endorsement modifications, click the **Cancel** button to close the *Post Policy Endorsements* dialog box.
- Click **Close** to close the Stewart Title underwriter service.

## Lender Information

Normally the lender information is used to populate the **Lender** section of the product request screen. However, if you need a different entity in that section, such as a different office or location in the lender's organization, you can use the **Title Insurance** fields in the **Lender** database to provide the name and address of that entity.

To do so:

- Click on **Data Entry** on the menu bar or press **ALT + D**. The **Data Entry** drop-down menu will be displayed.



- Click on **Database** or press **B**. The **Databases** dialog box will be displayed.
- Click on the **Lender** button to display the **Lender** database. Scroll down to the fields labeled **Title Ins. Name**, **Title Ins. Clause**, **Title Ins. Attn/Contact**, **Title Ins. Street**, and **Title Ins. City, State Zip**, **Title Ins. E-mail**, **Title Ins. Fax**, and **Title Ins. Phone**.

- Enter the information for the desired entity in the appropriate fields and click  or press **ALT + U** to save the changes.

You will need to do this for each lender that needs an alternate entity for the product requests.

With these fields initialized, the *Lender* dialog box will display a check box labeled *Use Title Insurance Address for Product Request*. It will be checked by default. This will cause the *Lender* section of the product request screen to populate with the alternate entity and will serve as the lender information submitted for the product request.

If for some reason you do not want the alternate entity for the product request in a particular closing file, you can always uncheck this check box and the primary lender information will be used instead.

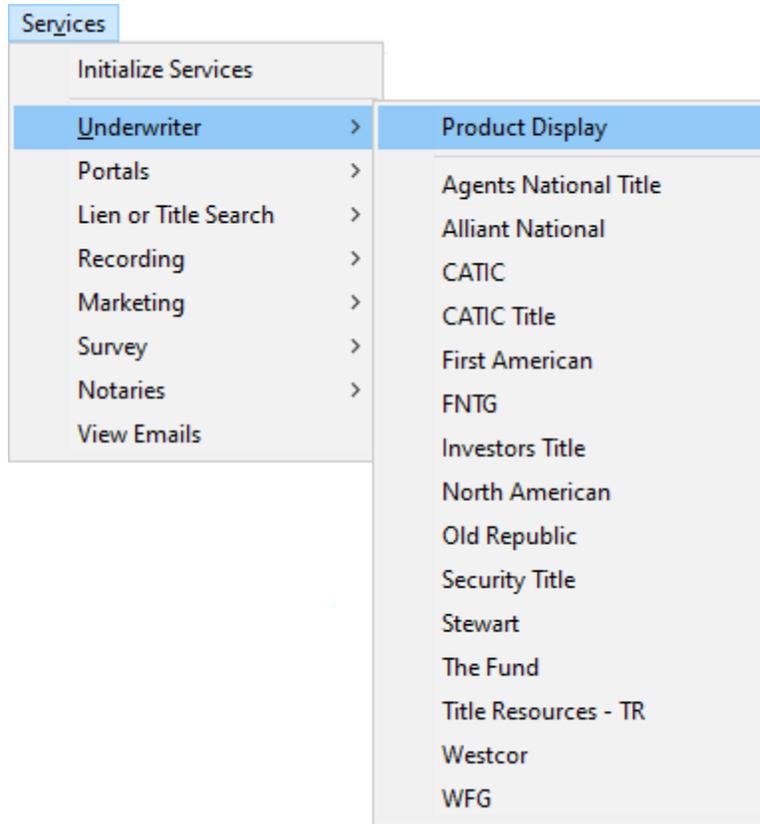
If you have entered a long name for the lender, the ***Use Long Name for Product Request*** check box will automatically be checked. This will cause the long name to be used in the product request. If you do not want to use the long name in the product request, uncheck the ***Use Long Name for Product Request*** check box.

## Product Display

***Product Display*** enables you to view Closing Protection Letters (CPL) and title insurance policy jackets downloaded through the Stewart Title underwriter service.

To view downloaded Stewart Title products:

- Click on ***Serv***ices on the menu bar or press **ALT + V**. The ***Serv***ices drop-down menu is displayed.
- Position the mouse pointer on ***Under***writer or press **U**.



- Click on ***Product Display***.
- A list of all title products downloaded for the current open closing file and any other PDF documents stored in the same location will be displayed.

File Name	Date
Stewart	
20210178-CPL-BuyerCPL-696055157.pdf	03/18/22 03:10:32 PM
20210178-CPL-LenderCPL-696059926.pdf	03/18/22 03:02:58 PM
20210178-CPL-LenderCPL-699456869.pdf	03/25/22 03:12:23 PM
20210178-Jacket-Commitment-1845579.pdf	03/24/22 05:29:32 PM
20210178-Jacket-Commitment-724527892.pdf	05/09/22 02:50:54 PM
20210178-Jacket-LoanPolicy-725685841.pdf	05/09/22 04:48:03 PM
20210178-Jacket-OwnerPolicy-725745551.pdf	05/09/22 04:52:09 PM

View Close

- Click on the desired document and click . You can also double-click on the document. The document will open on your screen for viewing.

**Note:** *Product Display* will not be active if you are not in a closing file or if you have not initialized the Stewart Title underwriter service in *Landtech*.