Stewart Integration

This guide walks through the **Stewart** integration, including Setup and Generating CPLs and Policy Jackets.

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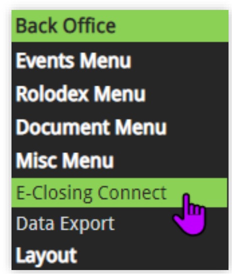
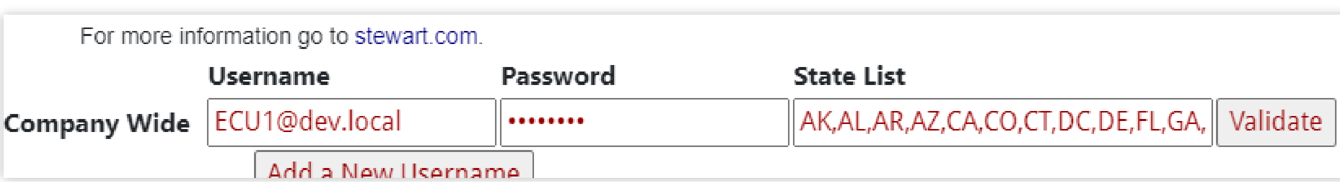
Integration Setup

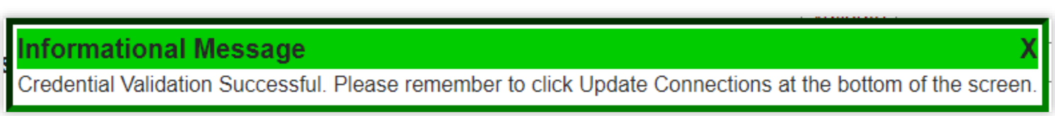


Start by heading to **Back Office** Back Office from your Whiteboard and selecting **E-Closing Connect.** If you don't see E-Closing Connect as an option, you may need to change your user access under Misc Menu > Manage Users in Back Office.

1. Find and click on the **Stewart logo.**
2. Enter the same **Username and Password** that you use to log in to access-ia.stewart.com and type in the abbreviation for each **State** applicable (separated by a comma).



3. Click **Validate.** A window will advise if successful or if there are invalid credentials.



4. Scroll to the bottom of the page and click **Update Connections**. 

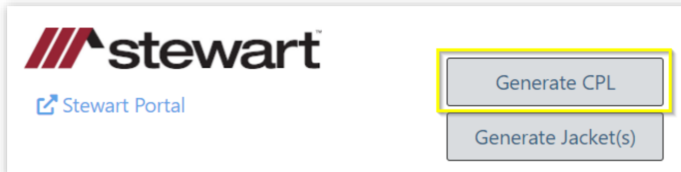
5. Setup is complete!

Generate CPL

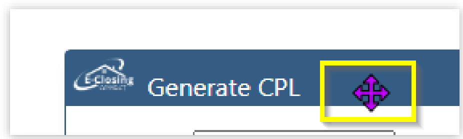
With the **Stewart** integration, you can Generate, Revise, and Void a CPL.

From within the file, under Maintain File, click on **Title Policy Information**.

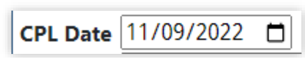
1. Select **Stewart** from the **Underwriter** dropdown menu.
2. Click on the **Generate CPL button**.



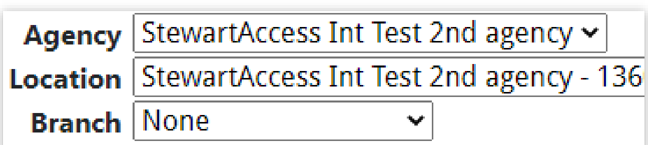
3. The **Generate CPL window** will appear for you to make selections and enter information. Click and drag on the top of the window to move it.



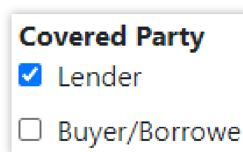
4. The **CPL Date** defaults to the current date. Revise by clicking on the calendar button.



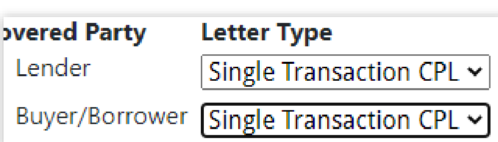
5. The **Agency**, **Location**, and **Branch** dropdown menus are populated with information through the Stewart Access integration and credentials. Location and Branch will also correspond with the Agency selected.



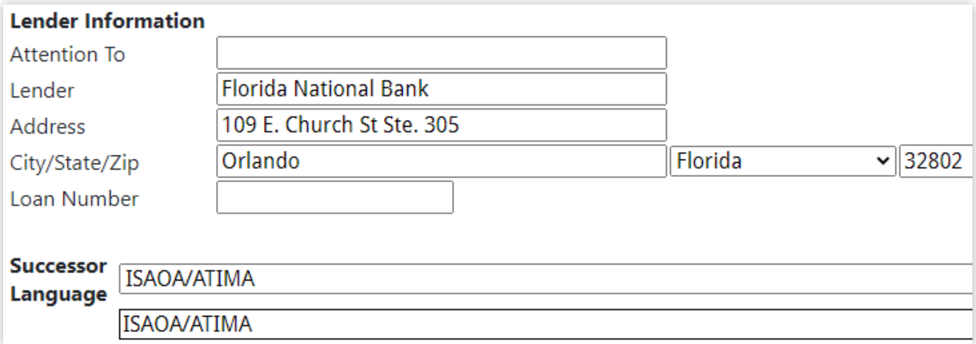
6. In the **Covered Party** section, options available depend on the property state (Lender and Buyer/Borrower or Lender and Buyer/Borrower and Seller). The Lender checkbox is selected by default. At least one selection is required, and more than one CPL type can be generated at a time.



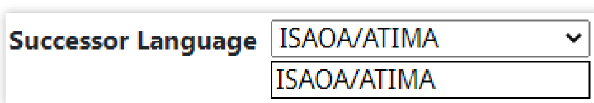
7. Select the correct **Letter Type**(s)



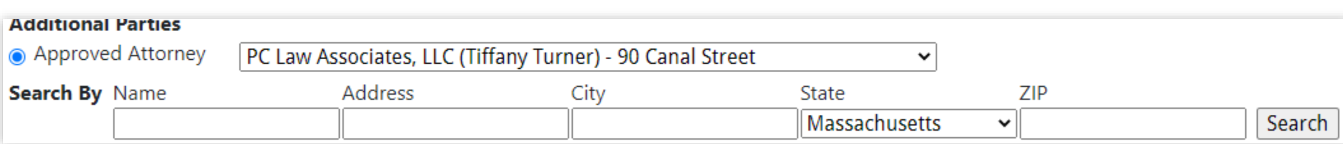
8. **Lender Information** and **Successor Language** (fields appearing only if Lender was checked in the Covered Party section) populate from the file and can be edited in the window. Changes do NOT save back to the file or Rolodex.



   a. **Attention To** – use this field to type a name or any other additional information.
   b. **Lender** – populates from the Lender Information page and is required for a Lender CPL. The Lender name may be changed in this field, though it will not save back to the file or Rolodex.
   c. **Address** – the address pulls from CPL Address fields on the Lender Information page.
   d. **Loan Number** – pulls from the Financial Information page and can be revised in this field by typing. This is not a required field.
   e. **Successor Language** – these fields auto-fill based on information entered in the Rolodex and is the difference between the Lender and Lender Insured Name fields of that parties Rolodex entry.
      i. The first field is a dropdown menu containing additional options through the Stewart Integration, except the first entry, which is from the Rolodex.
      ii. The display box under the dropdown can be edited and is what pulls to the CPL.



9. In the **Additional Parties** section, there are up to three options, Approved Attorney, Secondary Agency, and Settlement Company. These are not required fields, and only one Additional Party per file is permitted.
10. First, select the Additional Party type, then either choose from the dropdown menu



    or use the Search By fields (in any combination) and click **Search**.

11. When an Additional Party is **Marked as Favorite**, the next time a CPL is generated, the Additional Party displays at the top of the dropdown menu list under Favorites.
12. Click **Issue Selected CPLs.** The CPL(s) generate in another browser tab in PDF format. A copy is also saved to the file in Document Management.

If additional CPLs still need to be issued (for example, only the Lender CPL was issued, but a Buyer or Seller CPL is still needed), click the Generate CPL button again and make selections.

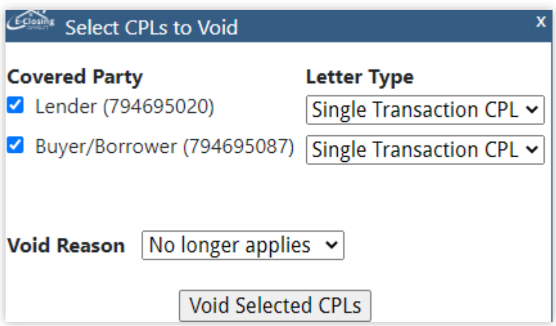
Revise CPL

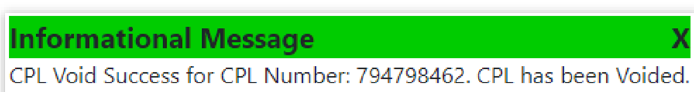
This button opens the Revise CPL window. Most fields can be edited (except Agency). Make changes and click Revise Selected CPLs. If more than one CPL was generated previously, use the Covered Party checkboxes to choose which to revise.

- If the Agency field needs to be revised, Void CPL and generate a new one.

Void CPL

In the **Select CPLs to Void** window, choose one or more CPLs, a Void Reason, and click **Void Selected CPLs**.





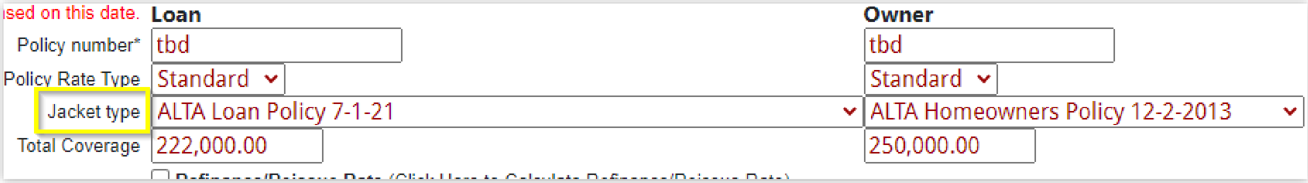
Generate Policy Jackets

With the **Stewart** integration, you can Generate, Revise, and Void Policy Jackets.

From within the file, under Maintain File, click on **Title Policy Information**.

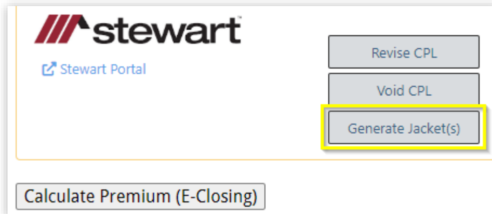
1. The **Title Insurance Premium** must be calculated before generating a Jacket. To learn how to calculate a premium, check out the Title Policy video at the top right of the Title Policy page.

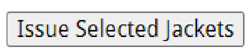
2. Choose **Jacket Type** for Loan, Owners, or both.



   a. If a **Short Form** jacket type is selected, use steps 3-10, but also [see below notes](#short-form-jacket-fields) regarding additional fields.

3. Click the **Generate Jacket(s)** button.



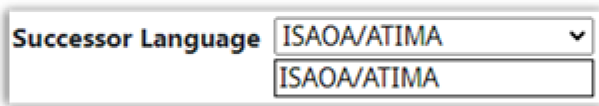
4. Choose **Agency** and **Location**. If a CPL has already been created for this file, Agency is automatically chosen and locked from revision.
5. *The **Transaction Type** dropdown menu appears depending on the file's Purpose (Lender Info page). If it is present, a selection is required.*
6. *The **Transaction Code** menu only appears for NY, NM, and TX properties.*
7. The **Jacket Date** is required. This field is populated by the Recorded Date (Deed for Owners, Mortgage for Lenders) or the Closing Date if no Recorded Date is found. Manually choose a Jacket Date if blank.
8. *Some states may have a **Product Option** dropdown menu and field for Additional or Special Charges. If present, choose an option from the dropdown and type amount in the field.*
9. Click **Issue Selected Jackets.** 

   The Jackets(s) generate in another browser tab in PDF format. A copy is also saved to the file in Document Management.
10. The **Policy Number**(s) auto-populates to the Policy Number fields on the Title Policy page.

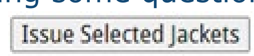
Short Form Jacket Fields

If a Short Form jacket type is chosen, some or all of the fields described below will appear (based on Short Form type) in addition to those explained in steps 1-9 above. Changes in this window do NOT save back to file or Rolodex.

- **Lender** – populates from the Lender Information page and is required for a Lender Jacket. The Lender name may be changed in this field.
- **Loan Number** – pulls from the Financial Information page and can be revised in this field by typing. This is not a required field.
- **Successor Language** – these fields auto-fill based on information entered on the Rolodex and is the difference between the Lender and Lender Insured Name fields of that parties Rolodex entry. Otherwise, they will be blank.
    - The first field is a dropdown menu containing additional options through the Stewart Integration, except the first entry, which pulls from the Rolodex.
    - The display box under the dropdown can be edited and is what pulls to the Jacket.



- **Jacket Date** – This field is populated by the Recorded Date (Deed for Owners, Mortgage for Lenders) or Closing Date (if no Recorded Date is found). Manually choose a Jacket Date if blank.
- **Policy Time Stamp** – This is the time the mortgage was recorded on the Recording Info page. It may be filled in, but doesn't save to file.
- **Mortgage Amount** – Populates from the Financial Information page, and **Borrowers Name and Vesting** from the Borrower's page. Both can be revised.
- **State Statutes** – An empty field that may be filled in.
- **Mortgage Date** – Populates from the Closing Date on the Financial Information page.

Some states may have additional fields as well, including some questions that need to be answered AFTER clicking **Issue Selected Jackets.** 

Revise Jacket

This button opens the Revise Jacket window. Most fields can be edited (except Agency). Make changes and click **Revise Selected Jackets**. If more than one Jacket was generated previously, use the checkboxes to choose which to revise.

- If the Agency field needs to be revised, Void CPL and Jacket and generate a new one.

Void Jacket

In the **Select Jackets to Void** window, choose one or more Jackets, a **Void Reason**, and click **Void Selected Jackets**.

FAQ

Why can't I generate a CPL?

The most common reasons are:

- An address and zip code must be entered on the Property Info page.
- A Lender and address for the Lender are required for Lender CPL. It can be added on the Lender Info page or manually typed in the Generate CPL window, though that information doesn't save back to the file.
- No CPL button on the Title Policy page could also be an issue with credentials. Navigate to Back Office > E-Closing Connect. Confirm the information is correct and re-validate.

For further assistance, reach out to Support - 603-485-7951 x1 / support@e-closing.com.

I see a new Transaction Type option when generating a jacket. Why am I seeing this now but not before?

The Transaction Type menu will not appear if your file's purpose is Refinance, Purchase, Cash Purchase, Construction Refinance, Home Equity with purchase, Seller Only, Short Sale Purchase, Purchase Mail Away, and Refinance Mail Away as they are chosen automatically. Any other Purpose triggers the dropdown menu to appear, and selection is required.

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