

## Stewart Integration Overview

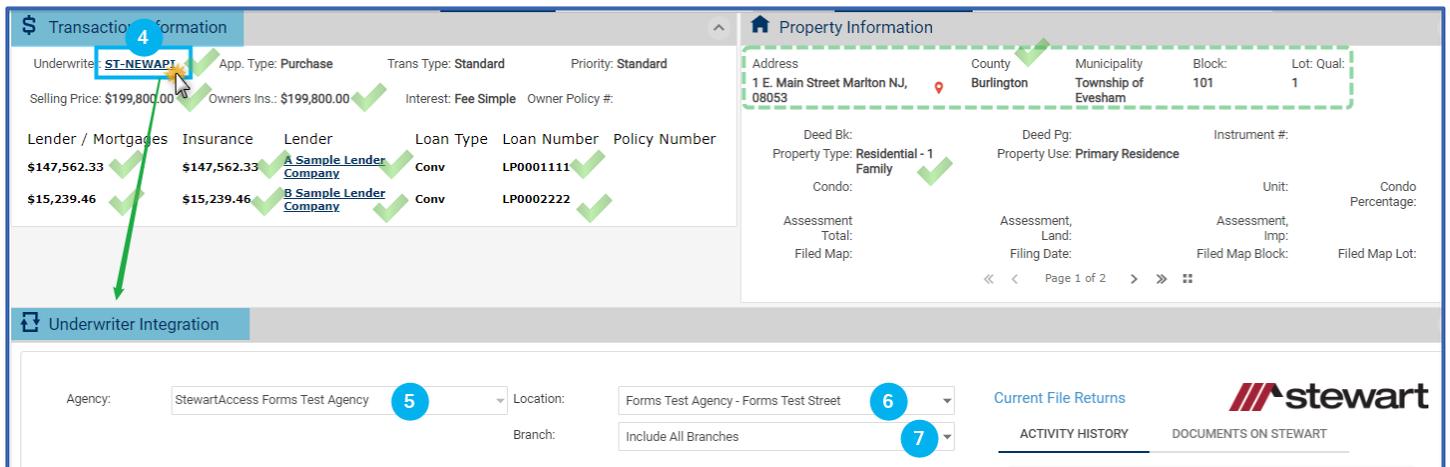
The Stewart/TitleFusion integration has been updated with new features and functionality. Users may request CPLs, Commitment Jackets and Policy Jackets through the integration. Use the following instructions to request items from the Stewart Integration.

### Verify **Essential** File Details

- Complete all details in the **Application Module**. Be sure to include:
  - Transaction Information:** the Purchase Price, Owner Insurance, Loan amount, Lender Insurance, Lender, Loan Number
  - Property Information:** the Property Address and/or tax identifiers, Property Type, and if the file has additional properties, then the **Exclude from CSL** checkbox may be checked to exclude the selected property from being listed on the Stewart product (CPL or AAL)
  - File Information:** a Closing Date
  - Buyer and Seller Information:** party details
- Add all Endorsements to the file in the **Endorsements** Tab of the Commitment Module.
- Calculate the premium in **Charges & Fees**.

### Access the Stewart Integration

- Select **Stewart's Underwriter ID** in the **Transaction Information**. The Integration window will open inside the Application Page.
- Agency:** Select the Stewart Agency associated with this request. Once a product is requested, then the options are disabled, and the field is locked. Voiding requested products will allow modifications to the Agency field.
- Location:** Select the agency location associated with this request. Different options may be selected for each product request. The location will display as the issuing agent's address at the top of the CPL.
- Branch:** If applicable, select the company's "branch" location for requesting CPLs. Different options may be selected for each product request. When selected, the branch location displays in an addendum attached to the CPL. (Options include individual branches, "All" and "None".)



The screenshot displays the Stewart Integration interface. The top section is divided into two tabs: "Transaction Information" (active) and "Property Information".

**Transaction Information:**

- Underwrite: **ST-NEWAPT** (Callout 4)
- App. Type: Purchase
- Trans Type: Standard
- Priority: Standard
- Selling Price: \$199,800.00
- Owners Ins.: \$199,800.00
- Interest: Fee Simple
- Owner Policy #:

Lender / Mortgage	Insurance	Lender	Loan Type	Loan Number	Policy Number
\$147,562.33	\$147,562.33	A Sample Lender Company	Conv	LP0001111	
\$15,239.46	\$15,239.46	B Sample Lender Company	Conv	LP0002222	

**Property Information:**

- Address: 1 E. Main Street Marlon NJ, 08053
- County: Burlington
- Municipality: Township of Evesham
- Block: 101
- Lot: Qual: 1
- Deed Bk: Residential - 1 Family
- Deed Pg: Primary Residence
- Instrument #:
- Assessment Total: Filing Date: Filed Map Block: Filed Map Lot:

**Underwriter Integration:**

- Agency: StewartAccess Forms Test Agency (Callout 5)
- Location: Forms Test Agency - Forms Test Street (Callout 6)
- Branch: Include All Branches (Callout 7)

### Request the Desired Product

A CPL / AAL (NY files) and Jackets may be requested through the integration.

Please note: The Endorsements tab is designed to list endorsements issued with the loan and/or owner jackets for informational purposes only.

### Request a CPL or AAL (NY)

- Select the **CPL** (or **AAL**) tab after the Integration window opens
- Covered Party:** Select the Covered Party. Options are state specific.
- Lender:** If the Covered Party is a Lender, then select the desired loan from the Lender drop-down.
  - Note:** The Successor Language will update to the language identified in the lender's phonebook entry for the new loan selected.
- If an additional issuing Party is applicable, then select the **Approved Attorney** OR the **Secondary Agency** OR the **Settlement Company**.
  - Fields may be disabled if they do not apply to that state.
  - Only one of these 3 fields may contain a value at any time.
  - Selections may be made from the Stewart "favorites" in the drop-down or by searching for entries by clicking on the ellipsis,
  - The party identified in any of these three fields is considered a second issuing agency.
- Successor Language:** The Successor Language will default to the language identified in the lender's phonebook entry. Other options may be selected as necessary.

## F. Options:

- i. Check the **Print Attorney Only** checkbox if available (state determined) and desired.
- ii. Select the **Use alternative addressee** to manually enter a different lender address (such as a branch's address) in place of the address in the lender's phonebook entry.

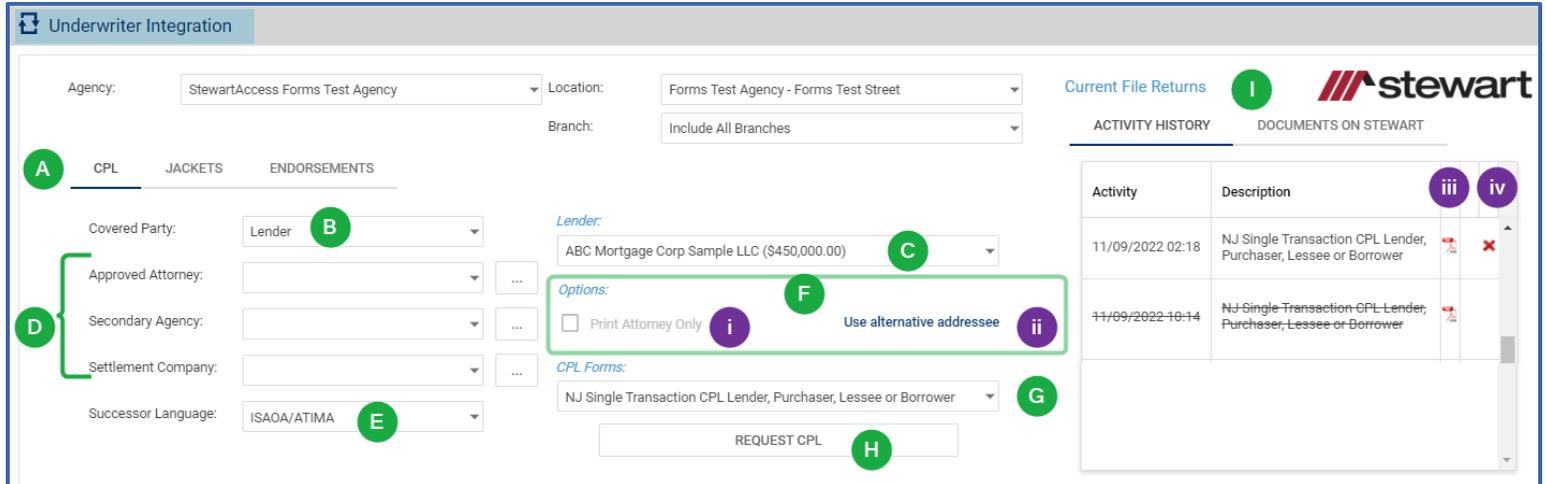
## G. CPL (AAL) Forms: Select the desired form from the Stewart provided options.

## H. REQUEST CPL: Select this button to request the CPL/AAL.

- i. The CPL/AAL details will automatically display in the **ACTIVITY HISTORY** table on the right and the document may be accessed in the file's Documents Module.

iii. A CPL/AAL may be reviewed by selecting the PDF icon .

iv. A CPL/AAL may be voided by selecting the **RED X** . Voided documents will automatically be archived in the Documents Module and the description will automatically indicate the void.



The screenshot displays the 'Underwriter Integration' window. At the top, there are dropdown menus for Agency (StewartAccess Forms Test Agency), Location (Forms Test Agency - Forms Test Street), and Branch (Include All Branches). Below these are tabs for CPL, JACKETS, and ENDORSEMENTS. The CPL tab is active, showing fields for Covered Party (Lender), Approved Attorney, Secondary Agency, Settlement Company, and Successor Language (ISAOA/ATIMA). The Lender field is set to 'ABC Mortgage Corp Sample LLC (\$450,000.00)'. Below the Lender field is the 'Options' section with checkboxes for 'Print Attorney Only' and 'Use alternative addressee'. The 'CPL Forms' dropdown is set to 'NJ Single Transaction CPL Lender, Purchaser, Lessee or Borrower'. A 'REQUEST CPL' button is at the bottom. On the right, the 'Current File Returns' section shows the Stewart logo and two tabs: 'ACTIVITY HISTORY' and 'DOCUMENTS ON STEWART'. The 'ACTIVITY HISTORY' table has two rows of activity, each with a PDF icon and a 'RED X' icon.

## Request a Jacket

At this time, Owner and Loan jackets are requested individually and Stewart does not require Commitment Jackets to be requested through the integration. Commitment Jackets may be added to the file through the Smart Commitment Sets.

- a. Select the **Jackets** tab after the Integration window opens.
- b. Select the radio button that corresponds to the desired jacket (**Owners Policy, Loan Policy, OR Commitment**).
- c. **Transaction is Simultaneous Issue**: This will automatically be selected for files with a simultaneous posture. The purpose of this checkbox alerts Stewart that multiple jackets are expected.
- d. **Transaction is Reissue**: If a file qualifies as a Reissue, then select this checkbox. (Users must select this identifier as it will not automatically pre-select.)
- e. **Loan**: If applicable, select the loan associated with the policy. (This field will not apply to the Owners Policy.)
- f. **Transaction Type** (State Specific): Select the transaction type when requested by Stewart.
- g. **Successor Language**: The Successor Language will default to the language identified in the lender's phonebook entry. Other options may be selected as necessary. (This field will not apply to the Owners Policy.)
- h. **Include Jacket Authorized Countersignature**: This will automatically be pre-selected and will include the signature of the file's Authorized Signatory on the requested Jacket.
- i. **Form**: Select the desired form from the Stewart provided options.
- j. **FILE ENDORSEMENTS**: Displays Endorsements previously selected in TitleFusion.  
Note: As a Best Practice, all Endorsements must be added to the file through the Endorsements Module before creating jackets. If a jacket(s) has already been requested, then additional Endorsements should be added to the file, the original jacket(s) should be voided, and then request new jacket(s).
- k. **ADDITIONAL ENDORSEMENTS**: Cautiously add Endorsements here if the Endorsement(s) should not appear on the Title Bill (this often happens for NY files).  
Note: Any Endorsements added in the integration WILL NOT flow to the file. Please use caution when adding Endorsements in the Integration.
- l. **REQUEST JACKET**: Select this button to request the Jacket.
- m. The Jacket details will automatically display in the **ACTIVITY HISTORY** table on the right and the document may be accessed in the file's Documents Module.
- n. Jackets may be reviewed by selecting the PDF icon .
- o. If liability amounts, premium/remittances, property information details or transaction type (NY files only) are updated within TitleFusion, then select the pencil icon  to update the jacket with the new details  
Note: The edit button cannot be used for modifications to Endorsements through TitleFusion. See item j above for the recommended best practice.
- p. Policy and Lender Jackets may be voided by selecting the **RED X** . Voided documents will automatically be archived in the Documents Module and the description will automatically indicate the void.

Underwriter Integration

Agency: StewartAccess Forms Test Agency Location: Forms Test Agency - Forms Test Street

Branch: Include All Branches

Current File Returns  m

ACTIVITY HISTORY DOCUMENTS ON STEWART

AAL JACKETs ENDORSEMENTs

Owners Policy  Loan Policy  Commitment

Liability: \$199,800.00 Loan: A Sample Lender Company (\$147,562.33)

Transaction Type: [Dropdown]

Successor Language: This is an example of the succe [Dropdown]

Include Jacket Authorized Countersignature

Form: ALTA Owners Policy - New York [Dropdown]

Transaction is Simultaneous issue  Transaction is Reissue

FILE ENDORSEMENTs ADDITIONAL ENDORSEMENTs

TIRSA Standard NY Owner Endorsement

REQUEST JACKET

Activity	Description
11/09/2022 04:25	ALTA Short Form Residential L Policy - NY - 6-17-2006 M-000-794695151
11/09/2022 04:24	ALTA Owners Policy - New York 6-17-2006 O-0000-794693321
11/09/2022-12:20	ALTA Loan Policy - New York 6-17-2006 M-0000-794654391
11/09/2022-12:10	ALTA Owners Policy - New York 6-17-2006 O-0000-704655232

### ENDORSEMENTS Tab (For Information only)

The table displays all Endorsements that have been issued and/or voided and identified with the jacket type to which they are attached.

Although Endorsements may be removed from a jacket by selecting the RED X , please be aware that this will not remove the Endorsement from the file. As a Best Practice, remove Endorsements in the Endorsements Module of TitleFusion, void the Jacket(s), and then request the new Jacket(s). There is no limit on the number of product requests through the integration.

CPL JACKETs ENDORSEMENTs						
Date	Identifier	Number	Status	Form	Jacket Type	
2022-10-14	1-1A7UE9P	E-0000-794615650	Void	Survey (9/10/07) (NJRb 5-01)	Loan	
2022-11-18	1-1A7VM1T	E-0000-794678252	Issued	Survey (9/10/07) (NJRb 5-01)	Owners	
2022-11-18	1-1A7W00N	E-0000-794688508	Issued	ALTA 8.1-06 Environmental Protection Lien Endorsement -NJ Variation (9/1/19) (NJRb 5-94)	Loan	
2022-11-18	1-1A7W00M	E-0000-794688509	Issued	ALTA 9.10-06 (Res) REM Current Violations (1/1/17) (NJRb 5-157)	Loan	