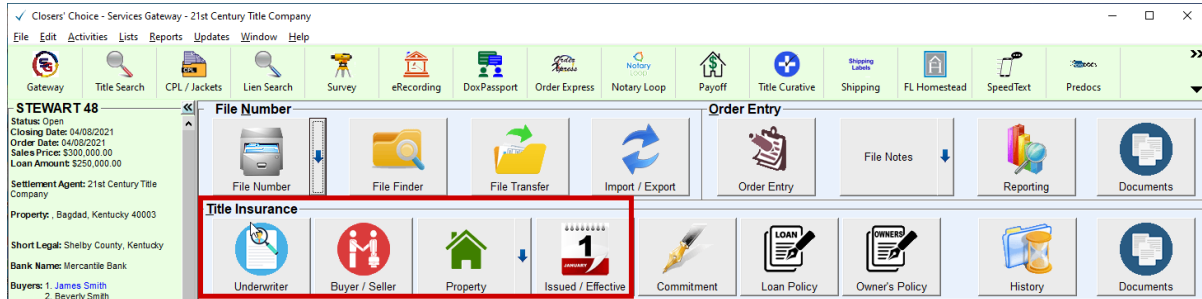



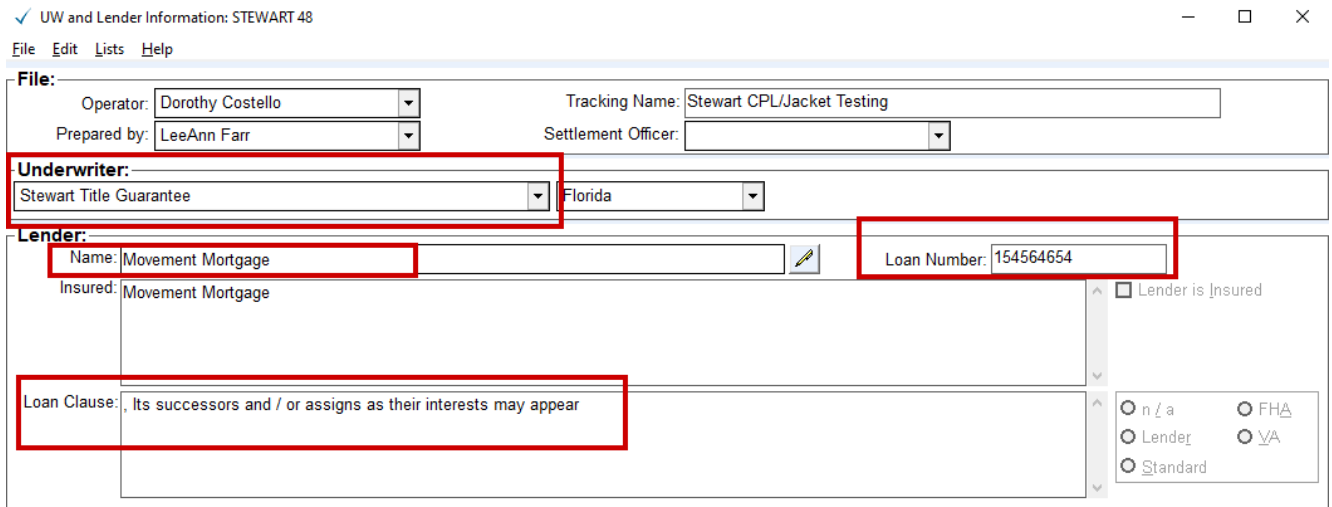
STEWART CPL USER INSTRUCTIONS

To use the integration, you need to make sure that you have Stewart Access setup. If you are **NOT** currently using it to get CPL's and Jackets you will need to contact your Stewart Title Rep and get upgraded first.

1. From the Main Screen of Closers' Choice, select the file you need to order a CPL for. Begin working through the second row of buttons on the main screen of Closers' Choice to complete your file.



2. Make sure you have the underwriter selected as Stewart. Under the Lender section make sure you have your Lender Name, Loan Number and the lender Loan Clause is completed. In the Pencil Icon to the right of the lender name  is where you can confirm your lender address. Also, in this screen you will have the ability at the bottom to enter in a different Lender Address for the CPL

The screenshot shows the 'UW and Lender Information: STEWART 48' form. The 'File' section includes Operator: Dorothy Costello, Tracking Name: Stewart CPL/Jacket Testing, Prepared by: LeeAnn Farr, and Settlement Officer. The 'Underwriter' section is highlighted with a red box and shows Stewart Title Guarantee and Florida. The 'Lender' section is also highlighted with a red box and includes Name: Movement Mortgage, Loan Number: 154564654, Insured: Movement Mortgage, and Loan Clause: Its successors and / or assigns as their interests may appear. There is a pencil icon to the right of the lender name. The 'Lender is Insured' checkbox is checked. The bottom right corner has radio buttons for 'n / a', 'FHA', 'Lender', 'VA', and 'Standard'.

Lender Information window

Edit Lender: STEWART 48 Stewart CPL/Jacket Testing

Lender Additional Contacts

Member Quick Name: MOVEMENT Update Address Book Darwin

Name: Movement Mortgage

Address: 1234 Movement Mortgage Way

City: Jacksonville State: Florida Zip: 32257-___

ST Lic.: NMLS ID:

Contact Information

Name: Henry Higginbotham

Office: (800) 752-5612 Ext: eMail:

Cell: ST Lic.:

Fax: NMLS ID:

CPL Information

Name: Movement Mortgage

Address: 1287 West State Street, Suite 100

City: Jacksonville State: Florida Zip: 32223-___

3. Complete your Buyer/Seller screens, as well as the Property screen.

Buyer/Seller Screen

Borrowers / Sellers: ALT 2250 Stewart Demo 2.0

File Edit Lists Options Help

Services Gateway Title Search CPL / Jackets Lien Search Survey eRecording Informant Order Express Notary Loop Payoff Tracking

Borrowers		Sellers	
#	Name		Joining Phrase
1	Mark Vega		, and
2	Constance Simmons		, husband and wife

Mark Vega

Add Delete Type: Corporation / Estate Man Woman

First Name: Mark Middle: Last Name: Vega Suffix:

Full Name: Mark Vega

Joining Phrase: , and Federal Tax Id: _____

Foreign Address Zip: 32904-___ City: Melbourne State: Florida

Street: 44 Shirley Avenue

Name attachment (fka, aka):

Phone Numbers: Ext: Types: Email Addresses:

Sign HUD: _____

Corporate Information:

Officer Name	Title	Sub Name	State of Incorporation
1.			
2.			
3.			

Title Vested in Borrowers:

Names Names Joined Joined w/ aka

Mark Vega and Constance Simmons

Notes:

Pronoun: they

Back OK Next

Property Screen

Property Information: STEWART 48 Stewart CPU/Jacket Testing

File Lists

Property Address:

Subdivision / Condo Index:

Parcel ID: 87001 43001 Type: Residential

AutoFill Address:

Street: 4352 Aston Avenue

Zip: 32223-___ City: Jacksonville State: Florida

County: Duval Township:

Use Buyer Address

Use Seller Address

Plat / Map / Subdivision / Condominium:

Lot Number(s): Block:

Name:

Unit: Week: Instrument:

Section: Township: Range:

Short Form Legal: Duval County, Florida

Assessments:

Land: Other Assessment Information:

Improvements:

Other:

Total:

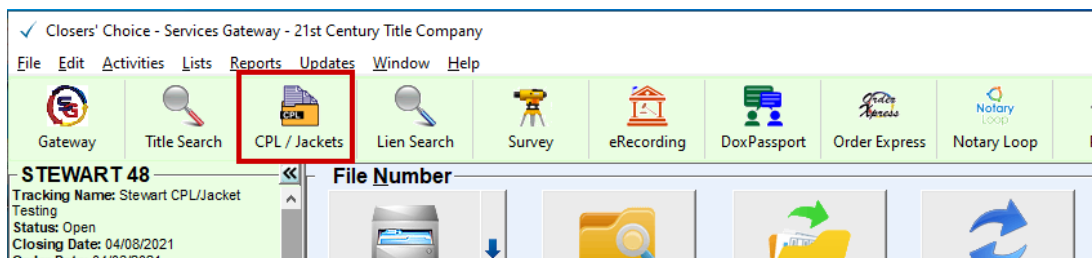
Taxes:

Tax Year: Taxes Shown on Search:

City / Township Tax Base:

Ok Next

4. Select the CPL/Jackets button from the Services Gateway toolbar at the top of the main screen of Closers' Choice.



5. The CPL/Jacket window opens in your screen.

Services Gateway - CPL / Jackets (Stewart) - STEWART 48A

CPL Jacket

Agency: StewartAccess Test Agency

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

Branch: Include All Branches

Form: FL Closing Protection Letter

Property Type: Residential - General

Covered Party: Lender

Movement Mortgage
1234 Movement Mortgage Way
Jacksonville, Florida 32257

Use CPL Lender Address

Approved Attorney **Select** Secondary Agency **Select** Settlement Company **Select**

Orders

Order Number	Date Created	Ordered By	Order Type	Covered Party/Form Type
--------------	--------------	------------	------------	-------------------------

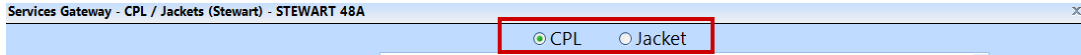
Documents

Document Name	Saved Date	Document Type	Size
---------------	------------	---------------	------

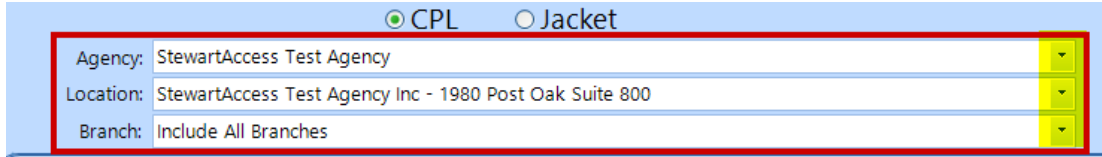
Get CPL

Closers' Link User: Vani@closerschoice.com Login: TPSTESTER2@devpicdev.local

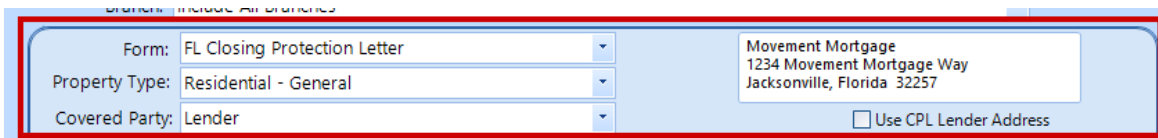
- At the top of the screen the option for CPL is defaulted



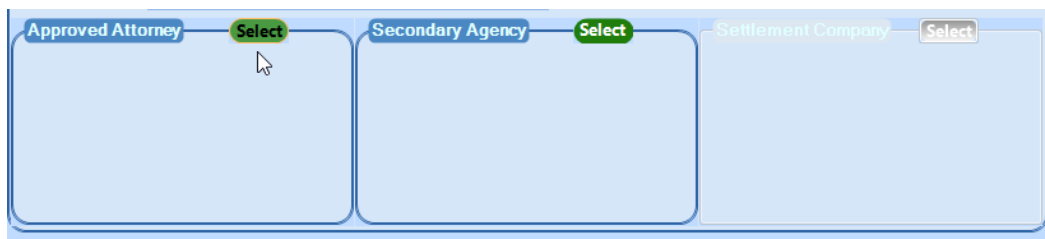
- In the Agency, Location and Branch fields you can click the down arrow to make the appropriate selections.



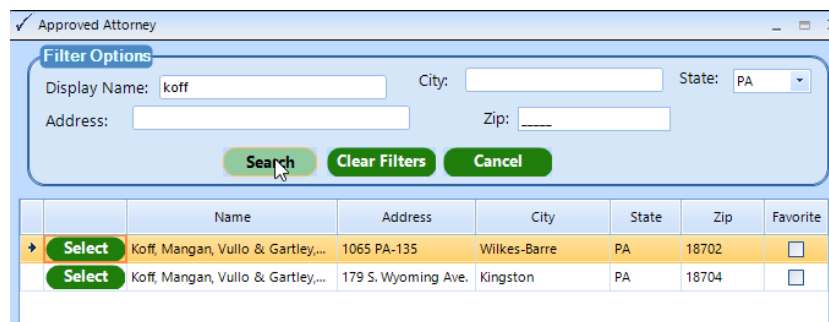
- In the next section select your form type using the drop down arrow, then confirm your property type. If the property type in the property screen was selected as residential then residential will automatically be selected. All others will default to Commercial. Select the Covered Party for this CPL and then confirm the lender information. If you added a Lender CPL address as explained in number 2 above then when you click the Use CPL Lender Address it will populate the box with the address entered.



- In the next section you have the ability to select either Approved Attorney, Secondary Agency or Settlement Company. Notice in the screen shot that the settlement Company is gray. This is because in the either state where the property is located, or the Agency selected above does not have any settlement Companies assigned under it.



To Select one of the options in the screen shot above, click on the select button. The window opens with a search section above. If you want to enter in one or the other of the fields provided and click search it will limit the results to what was entered. Otherwise you can click the search button without entering any information and the full list of available offices will load. Click on the select button to select the office. You can also use the Favorite option on the right to designate this office as a favorite making it always appear at the top of your list when you select the Search button. To un select the office you would need to uncheck the option and the click the select button then go back to the search screen and it will remove the check option for that office.



Form: PA TIRBOP Closing Protection Letter 10-1-19

Property Type: Residential - General

Covered Party: Lender

Movemer
1234 Mo
Jacksonov

Approved Attorney [Select](#) [Clear](#) **Secondary Agency** [Select](#)

Name: Koff, Mangan, Vullo & Gartley, P.C.
Individual Attorney: James Mangan
Location:
 1065 PA-135
 Wilkes-Barre PA 18702

Once your office is selected the information will populate on the front screen. You have the option to clear the information or click select again to change it.


- Once you have made all the selections click the Get CPL Button. The button will change to orange color confirming that you have clicked. The CPL will be returned and show the order placed in the Orders section and the document will automatically be saved in your file. In the Documents section you also could click view to see the results and confirm that the CPL is as requested.

Orders

Order Number	Date Created	Ordered By	Order Type		Covered Party/Form T...
21821-5911173047298-5742127...	4/14/2021 10:17:04 AM	Vani@closerschoice.co...	CPL	Void Revise	Lender

[Get CPL](#)

Documents

Document Name	Saved Date	Document Type	Size	
 CPL_1-16KMB98_574212732.PDF	4/14/2021 10:17:04 AM	CPL	88,306	View

- If you need to change the CPL, you have the option to Revise. When choosing to revise a screen will load with the option that are available for revision. If the reason for the revision is not one of the options that are available, you can choose void.

On the Revision Screen you can make the necessary changes. Click Revise CPL will remove the original CPL and replace it with the new one. .

Services Gateway - CPL / Jackets (Stewart) - Revise STEWART 48A

Agency: StewartAccess Test Agency Location: 123 Main Abstract - 1980 Post Oak Suite 800

Branch: Include All Branches Covered Party: Lender

Form: PA TIRBOP Closing Protection Letter 10-1-19 Property Type: Residential - General

Use CPL Lender Address Movement Mortgage
1234 Movement Mortgage Way

Approved Attorney Select
Name: Koff, Mangan, Vullo & Gartley, P.C.
Individual Attorney: James Mangan
Clear
Location:
1065 PA-135
Wilkes-Barre PA 18702

Secondary Agency Select

Settlement Company Select

Revise CPL

If Void is selected the window will open asking you to select a reason for the Void. Click the down arrow will allow you to select from the available reasons

Void

Reason:

Coverage Declined

Coverage Declined

Created in Error

Duplicate

No longer applies