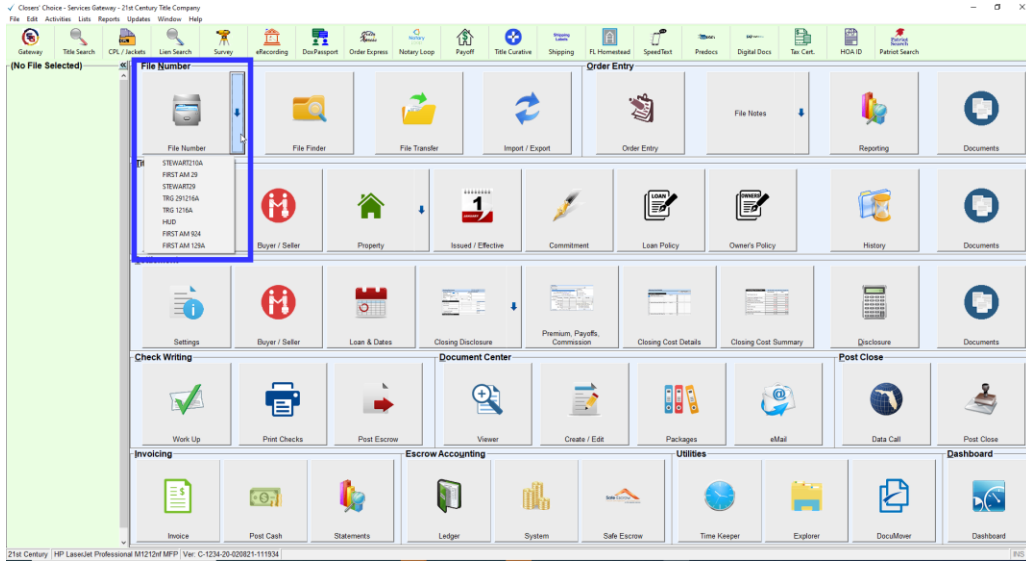


Stewart Title Policy Jackets.

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, open the File you wish to use as you normally would or create a file and input the information you have available.



2. Make sure you have entered in the necessary information for your Buyer(s)/Seller(s). You are REQUIRED to have a full address for your buyers.

Borrowers		Sellers	
#	Name	Joining Phrase	
1	Patricia Hensen	, an unmarried woman	

Patricia Hensen

Type: Corporation / Estate Man Woman

First Name: Patricia Middle: Last Name: Hensen Suffix:

Full Name: Patricia Hensen

Joining Phrase: , an unmarried woman Federal Tax Id:

Foreign Address Zip: 32257- City: Jacksonville State: Florida

Street: 63410 Dogwood Drive

Name attachment (fka, aka):

Phone Numbers: Ext: Types: Email Addresses:

1. (904) 841-7810 1. pattyhensen@pattyhensen.net

2. 2.

3. 3.

Sign HUD:

Corporate Information:

Officer Name: Title: Sub Name: State of Incorporation:

1. 1.

2. 2.

3. 3.

Title Vested in Borrowers:

Names Names Joined Joined w/ aka

Patricia Hensen

Notes:

Pronoun: she

Use Informant

User Name: Password: Auto Notices?

3. Verify that you have all the necessary fields completed in the Property screen. The only fields required are the State and County.

Property Information: ALT TEST 1 ALT TEST 1

File Edit Lists Help

Services Gateway Title Search CPL / Jackets Lien Search Survey eRecording Informant

Property Address:

Subdivision / Condo Index: [] Add

Parcel ID: 65-98521 Type: Residential Use Buyer Address Use Seller Address

Street: 5252 Paradise Lane

City: Jacksonville State: Florida Zip: 32246- []

County: Duval Township: []

Plat / Map / Subdivision / Condominium:

Lot Number(s): [] Block: []

Name: []

Unit: [] Week: [] Book: [] Page: []

Section: [] Township: [] Range: []

Short Form Legal: Duval County, Florida Refresh

Taxes:

Tax Year: [] Taxes Shown on Search: []

City / Township Tax Base: []

Assessments:

Land: [] Other Assessment Information: []

Improvements: []

Other: []

Total: []

Back Ok Next

4. Make sure your loan number is provided in the Underwriter screen, as well as your loan clause and your lender's address.

WV and Lender Information: STEWART210A, Whitefield TR / Hughes, Crown

File Edit Lists Help

Operator: Linda Clark Tracking Name: Whitefield TR / Hughes, Crown

Prepared by: Donna Dotan Settlement Officer: Donna Dotan

Underwriter:

Reset Data Overrides []

Lender: Name: GMAC Mortgage Corporation Loan Number: 6666436 Lender is Inbound

Address: GMAC Mortgage Corporation

Loan Clause: By successors and / or assigns as their interests may appear

Customer / Bill To: [] Ordered By: Lillian Gausin Customer File Number: []

Issuing Agent / Place of Settlement:

Agency Name: Affiliated Title of Central Florida, Ltd License ID: A369802 Defaults

Street: 10535 SE 17th Pl Suite 302 & 303

City, State, Zip: Summerfield, Florida 34491 Phone: (352) 633-9341 Settlement Service Providers: []

Signing Agent: Donna Dotan Signing Agent License ID: []

County: Marion Email: []

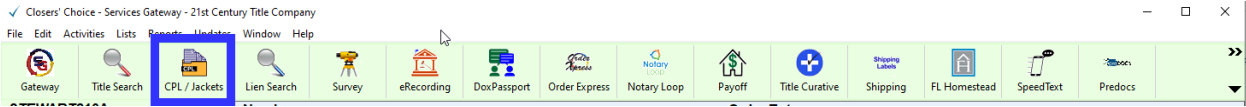
Select Agent Reset Agent

Back Ok Next

- Be sure to select your Underwriter on the file as well before ordering. This will eliminate additional steps later in the ordering process.

- Enter the effective date in the Issued/Effective screen for the Jacket you need to order. Also make sure the check box next to the policy is selected for the jacket you need. The amount will also need to be completed, either by selecting the "Policy Same as Loan Amount/Sales Price" check box or typing in the amount in the "Policy Coverage" field.

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



8. The CPLs/Jackets order window appears. It automatically defaults to the CPLs option.
Note: if this is your first time using the integration you will be prompted for your credentials. In this window, please enter in the credentials given to you **from Stewart Title**.

A screenshot of a 'Credentials' dialog box. The title bar says 'Credentials'. The main text says 'Please set your Stewart Credentials'. There are two input fields: 'User Name:' and 'Password:'. The 'Password:' field has a 'Show Password' checkbox. A green 'Save' button is at the bottom.

When it Opens to CPL click the button for Jacket.

A screenshot of the 'Services Gateway - CPL / Jackets (Stewart) - STEWART224B' window. At the top, there are radio buttons for 'CPL' (selected) and 'Jacket'. Below this are dropdown menus for 'Agency: -- Please Select --', 'Location:', and 'Branch:'. The 'stewart' logo is on the left. A form section contains 'Form:', 'Property Type:', and 'Covered Party:' dropdowns. To the right, there is a text box with 'GMAC Mortgage Corporation, 455 west state street, Jacksonville, Florida 32257' and a 'Use CPL Lender Address' checkbox. Below this are three 'Select' buttons: 'Approved Attorney', 'Secondary Agency', and 'Settlement Company'. At the bottom, there are two tables: 'Orders' and 'Documents'. The 'Orders' table has columns: Order Number, Date Created, Ordered By, Order Type, and Covered Party/Form Type. The 'Documents' table has columns: Document Name, Saved Date, Document Type, and Size. A green 'Get CPL' button is on the right side.

- If you ever need to change or update your credentials, select the red key button on the order form. The pop-up from Step 8 above will appear. Update your credentials as necessary and select the "Save" button.

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

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

Jacket Type: Loan
Successor: , Its successors and / or assigns as their interests may appear
From File
And/or: The Secretary of Housing and Urban Development, ISAOA ATIMA
Select

Red Key

Order Number	Date Created	Ordered By	Order Type	Void	Revise	Covered Party/Form Ty...
21777-591234939645--5731628...	4/8/2021 9:39:58 AM	Vani@closerschoice.com	Jacket	Void	Revise	Loan

Get Jacket

Document Name	Saved Date	Document Type	Size
Jacket_POLICY_1-16JZT4R_573162811.pdf	4/8/2021 9:39:58 AM	Policy/Jacket	247,644
CPL_1-16JZT2U_573162742.PDF	4/8/2021 9:37:36 AM	CPL	84,847

- Select your agency name from the "Agency" drop-down menu. If you only have one office/branch location, it should be selected as the default. If you have more than one office, be sure to select the correct office from this drop-down menu before continuing.
- Select your Office Location from the Location drop down.
- Select your Jacket Type. You will be producing one jacket at a time. If you are choosing Commitment Jacket then proceed step 17.
- For the Loan Jacket the Successor information will be pulled in from the file, underwriter screen and Loan Clause section. The field below the Successor Language is optional where you can pull the information from Stewart Title Insurance Company by using the down arrow and then click the select button. When you have made your selection click the Select button and the phrase will move into the Successor Field. If you want to revert to the one from your file, click the From File button. Once ready click the Get Jacket Button.

Underwriter:
Stewart Title Guarantee | Florida

Lender:
Name: GMAC Mortgage Corporation | Loan Number: 4646436
Insured: GMAC Mortgage Corporation | Lender is Insured

Loan Clause: Its successors and / or assigns as their interests may appear

n / a FHA
 Lender VA
 Standard

CPL Jacket

Agency: StewartAccess Int Test 2nd agency

Location: StewartAccess Int Test 2nd agency - 1360 Post Oak Blvd Floor 13

Branch: Include All Branches

Jacket Type: Loan

Successor: , Its successors and / or assigns as their interests may appear

From File

Its Successors And/Or Assigns

Select



14. Once you select your Jacket Type and have clicked the Get Jacket Button will load the next screen to finalize your file information.

Stewart Jacket

a Form Selection: ALTA Loan Policy 6-17-2006

b Information

i Effective Date: * 4/6/2021 **v** Prior Liability Amount: 150,000.00 **ix** Prior Policy Type: --Please Select--

ii Liability Amount: * 250,000.00 **vi** Prior Policy Date: **x** Simultaneous

iii Gross Premium: * 125.00 **vii** Prior Policy UW: --Please Select -- **xi** Refinance/Reissue

iv Remittance: * 37.50 **viii** Prior Policy Num: **xii** Municipal Code: --Please Select--

c Endorsements

	Name	Premium	Remittance
<input checked="" type="checkbox"/>	Endorsement 8.1	\$25.00	\$7.50
<input checked="" type="checkbox"/>	Endorsement FI Form 9	\$170.00	\$51.00

i Endorsements: ALTA 5-06 Planned Unit Development Rev 2-3-10 **Add**

d Transaction Code: --Please Select--

e Form Fields

Name	Value
Addendum Attached	No <input checked="" type="checkbox"/>
Mortgage Amount	150000.00
Mortgage Date	02/09/2021
State Statutes	

f Special Charges 6042 Commitment Issued to F.D.I.C. and O.T.S.Commitment t **Add**

Description	Value	Premium	Remittance
This Section appears for TX			

g Additional Charges New York Abstracts **Add**

Description	Value
This Section appears for NY	

Get Jacket

- a. In the Form selection you will have options in the drop down dependent on the policy type selected in the prior screen.
- b. Information section pulls information from the Issued / Effective screen. See step 6 above. You do have the ability to change these values but note they do not write back to the Closers Choice file.
 - i. Effective Date is the policy effective date.
 - ii. Liability Amount will be the policy liability from Issued / Effective screen and will display the appropriate liability for the policy type selected.
 - iii. Gross Premium is the premium charged for the policy from the premium calculation on the closing statement.
 - iv. Remittance is the underwriter split for the gross premium.
 - v. Prior Liability would pull in if reissue credit was applied on the premium calculation screen. This would pull the coverage entered.

- vi. Prior Policy Date would need to be manually entered. This would be the date from the prior policy that was received to apply reissue credit.
 - vii. Prior Policy UW is the Underwriter the prior policy was issued under. Using the drop-down arrow to select. If the policy was not issued under Stewart, then choose other.
 - viii. Prior Policy Num is the number off the policy itself.
 - ix. Prior policy type can be selected from the drop-down arrow.
 - x. Simultaneous will be auto checked and is dependent on the entries from the Issued/Effective screen.
 - xi. Refinance/Reissue will also be auto checked and is dependent on the entries from the policy types selected on Issued/Effected screen and if in the Closing section, Loan and Dates screen the Refinance check box is marked.
 - xii. Municipal Code field is required and will only show if the property is in KY or LA.
- c. Endorsements section table shows the endorsements that were selected on the closing statement. In the table the Premium and Remittance columns were also pulled in from the closing statement and can be changed.
- i. Endorsements can also be added here using the drop-down menu and selecting them from the list that Stewart has provided. Click the down arrow to show the list, click on the endorsement that needs to be added and click the add button. This will insert that endorsement into the table above. Enter in the Premium and Remittance for this endorsement.
- d. Transaction Code field will only appear if in states where Transaction codes are required. Click the down arrow to select the appropriate code.
- e. Form Fields are populated when Short Form Policy is selected.
- i. The Name Column will show the additional information needed for the Short Form Policy
 - ii. The Value Column will be where the appropriate information for what appears in the Name Column can be added. If the in the Name Column is requiring a yes or no answer, there will appear a check box in the value column. Checking the box in this instance will enter a yes as the value. When a date is required you can click the down arrow and select the date. Other values could just be typing in information or dollar amounts.
- f. Special Charges section will appear when applicable. Click the down-arrow to select the charge and click the add button. Then in the table fill in the column information.
- g. Additional Charges section will also only appear when applicable. Click the down-arrow and select the charge from the list and click add. Then in the table fill in the value of that charge.

15. Click Get Jacket.

- a. At this point if there are any additional questions that need to be answered a window will pop open. Where you will see the question-and-answer column. In the answer column click the column and row and a down arrow will appear where you can choose the answer. When done click submit. The screen will close and the main Jacket window will open. When the Jacket is returned from Stewart it will appear in the documents table. You can click the view button to review the form and confirm the information.

Question	Answer
Endorsement 8.1	--Please Select--
Endorsement FI Form 9	--Please Select--

Cancel Submit

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

CPL Jacket

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

stewart

Jacket Type: Loan
 Successor: , Its successors and / or assigns as their interests may appear
 And/or The Secretary of Housing and Urban Development, ISAOA ATIMA

From File
 Select

Orders

Order Number	Date Created	Ordered By	Order Type		Covered Party/Form T...
21777-5911564074264-5731654...	4/8/2021 11:41:37 AM	Vani@closerschoice.co...	Jacket	Void	Commitment
21777-5911633853236-5731574...	4/8/2021 10:55:08 AM	Vani@closerschoice.co...	Jacket	Void	Commitment
21777-591234939645-573162811	4/8/2021 9:39:58 AM	Vani@closerschoice.co...	Jacket	Void Revise	Loan

Get Jacket

Documents

Document Name	Saved Date	Document Type	Size	
Jacket_POLICY_1-16JZV6X_573165481.pdf	4/8/2021 11:41:37 AM	Jacket	207,604	View
Jacket_POLICY_1-16JZOTZ_573157449.pdf	4/8/2021 10:55:08 AM	Jacket	208,055	View
Jacket_POLICY_1-16JZT4R_573162811.pdf	4/8/2021 9:39:58 AM	Jacket	247,644	View
CPL_1-16JZT2U_573162742.PDF	4/8/2021 9:37:36 AM	CPL	84,847	View

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

16. In the orders Section there is the ability to Void and Revise.
- Voiding you will only need to answer the question as to the purpose of the void.
 - Revising will load a screen where you have the ability to revise either the Jacket or the Endorsements.

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

Jacket Endorsement

Agency: Accurate Title Group
 Location:

- Revising Jacket window will show you the available items to revise. Select your location and change the value(s) that are changing for the revision. Notice the red * on some of the fields designate that these fields are required.

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

Jacket Endorsement

Agency: Accurate Title Group
 Location:

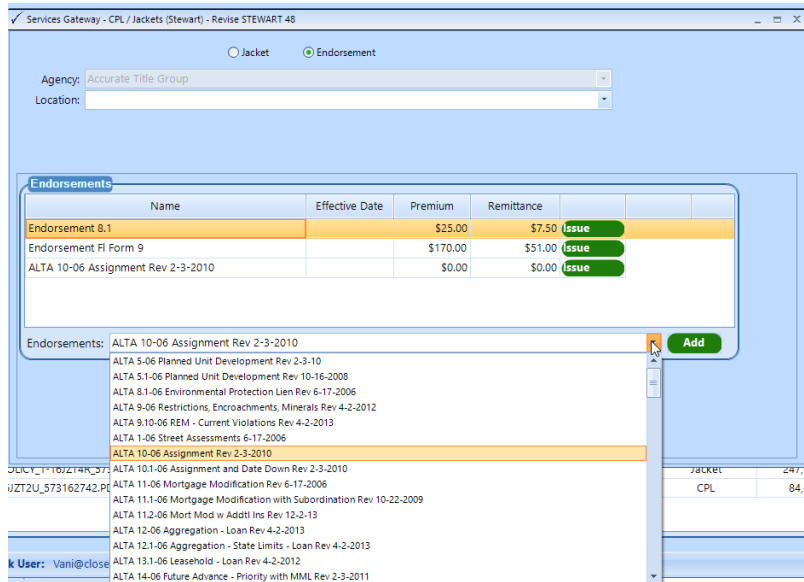
Property County: * Shelby Property Type: Residential - General

Information

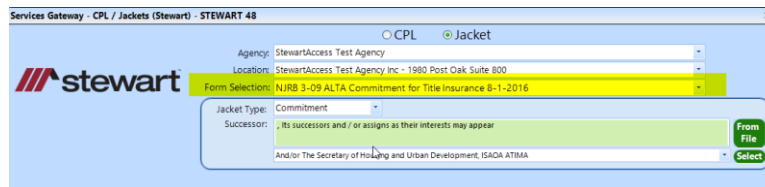
Effective Date: * 4/6/2021	Prior Liability Amount: 0.00	Prior Policy Type:
Liability Amount: * 150,000.00	Prior Policy Date:	Municipal Code:
Gross Premium: * 250.00	Prior Policy UW: --Please Select--	
Remittance: * 25.00	Prior Policy Num:	

Revise Jacket

- ii. Endorsement revision can be used to change premium's, Remittance and Add. When adding a new endorsement make sure you enter in the Effective Date of the new Endorsement this is only required when adding endorsements on revision.
 - a. To add the new endorsement, click the down-arrow and select the endorsement. Click the add button will move the endorsement to the table where you can now enter in the effective date.
 - b. If revising an endorsement that was originally issued with the Jacket you will need to make the correction and also add an effective date.



- 17. If Jacket type is Commitment the Form Selection Field will be displayed above the Jacket type. Click the down arrow to make your selection. When done click the Get Jacket Button.



- 18. Once you have clicked on the final Get Jacket button the main window will return. In the orders section you will see the most recent Jacket ordered at the top of the list. The Orders list is specific to the selection of either CPL or Jacket. The Documents List is all the documents for either CPL or Jackets.

Note. Not all orders can be revised. It depends on the type. And in the Document list the Document Type reflects the option of either CPL or Jacket.

