Creating CPLs in Stewart Access Portal

Getting Started Guide

November 2016

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Introduction

This document walks you through what you need to know about creating Closing Protection Letters (CPLs) in Stewart Access Portal.

Browser Recommendations

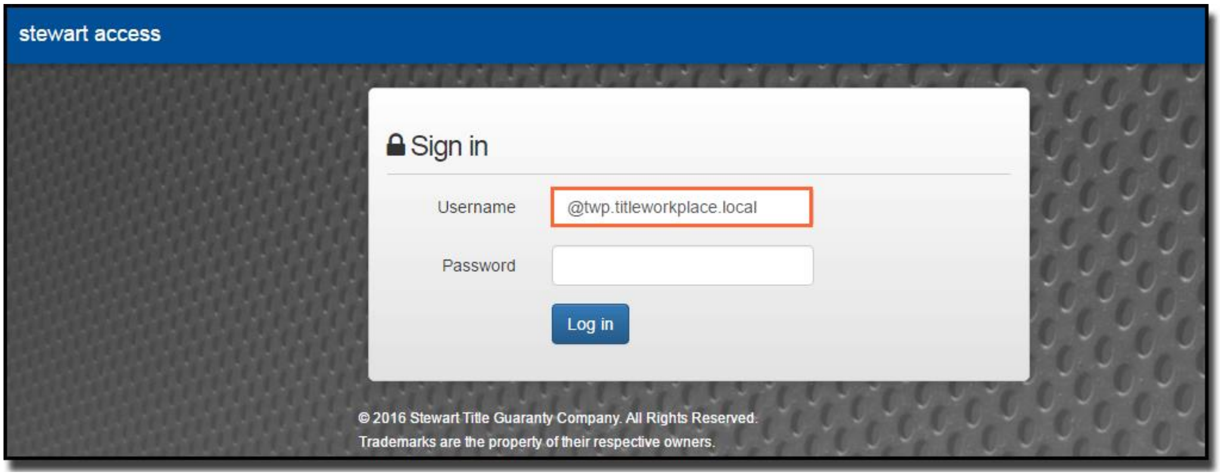
Stewart Access performs best with the latest versions of **Google Chrome** and **Internet Explorer**. For optimal performance, **Firefox** is *not recommended*.

Getting Started

Complete these steps to log into Stewart Access via TitleWorkPlace.

Steps

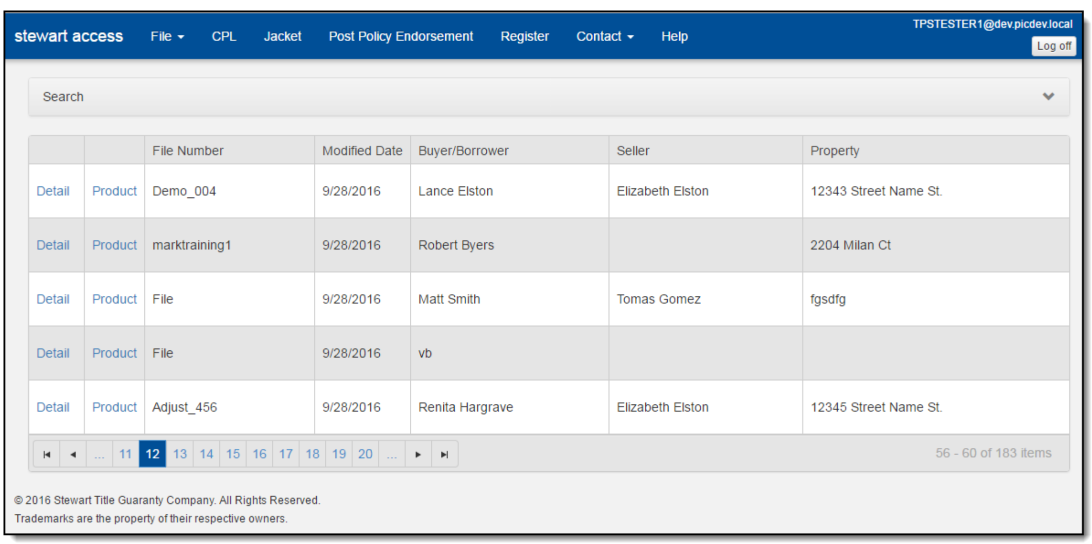
1. Click this URL to log into Stewart Access from **TitleWorkPlace:** https://access-ia.stewart.com/. The *Sign in* screen displays.



2. Place your cursor before **@twp.titlworkplace.local** and enter your user name.

> **Note:** Do not clear the field before entering information.

3. Enter your password and then click **Log in**. A *Search* screen displays a grid with a list of files worked within the last 30 days.



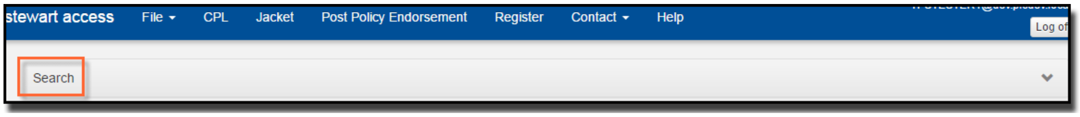
- To view basic file information such as *Parties*, *Property Address* and *Lender* information, click the **Detail** link.
- To view file production information such as *CPLs*, *Policies*, *Post Policy Endorsements*, and *File Charges*, click the **Product** link.

Search for a File

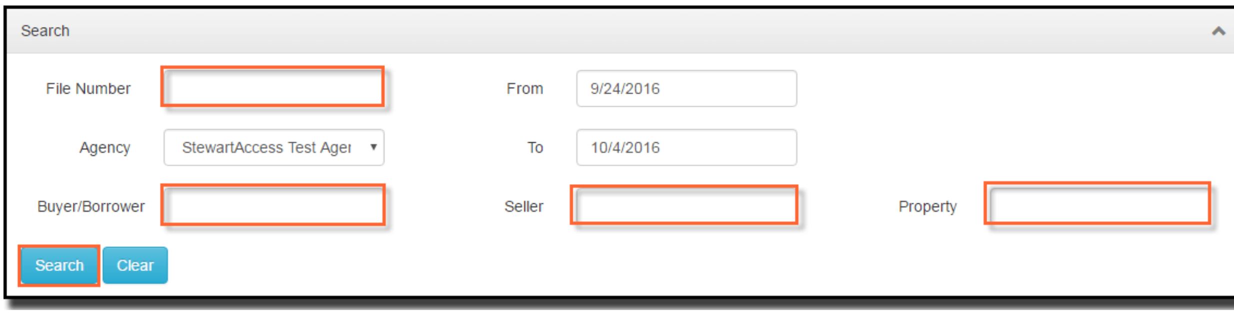
Complete these steps to search for a file.

Steps

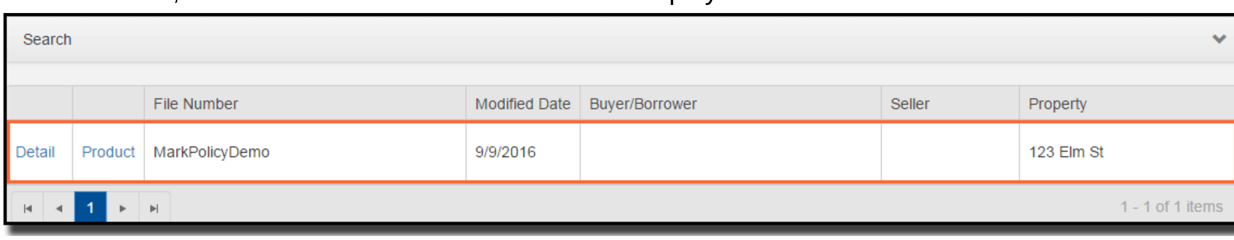
1. To search for an existing file, click **Search**. Additional search fields display.



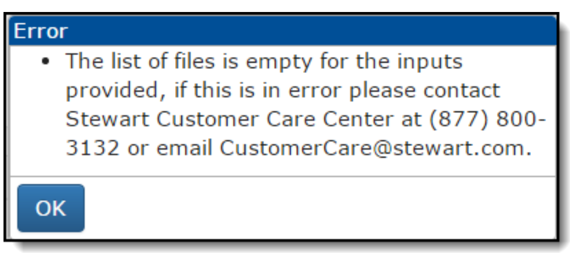
2. Enter Search parameters. You may search by File Number, Buyer/Borrower, Seller or Property.



3. When finished, click Search. Available search results display.



If no matches are found, the following message displays. Click **OK** to exit this message.



4. If needed, you can search again by clicking **Clear** to remove previously entered criteria and then search again by entering different values.

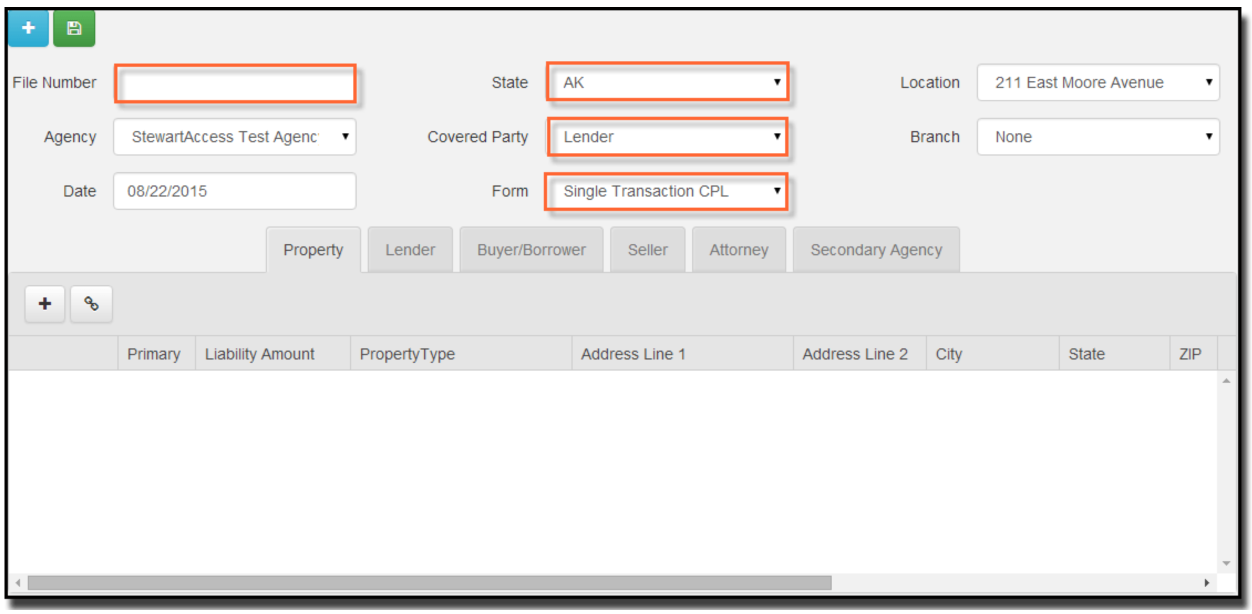
Creating a CPL

Complete these steps to create a CPL within the Stewart Access Portal.

Steps

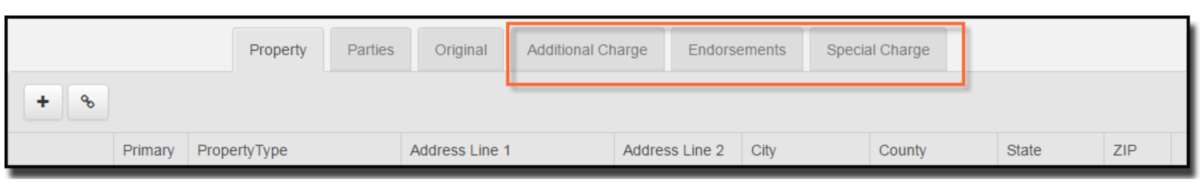
1. From the main menu, select **CPL**.

2. Enter the **File Number**, **State**, **Covered Party**, and **Form**.



Additional Information

Notice the **Date** field default to today's date and the **Location** field defaults to the Agency's location. A **Branch** may be chosen from the selection list, otherwise defaults to **None**. As you enter information in the fields, you may notice a slight pause. This is because Stewart Access conducts validations in the background as you work; this is considered normal behavior. You may also notice additional tabs display as you move through the fields. Your screen may change to look similar to this:



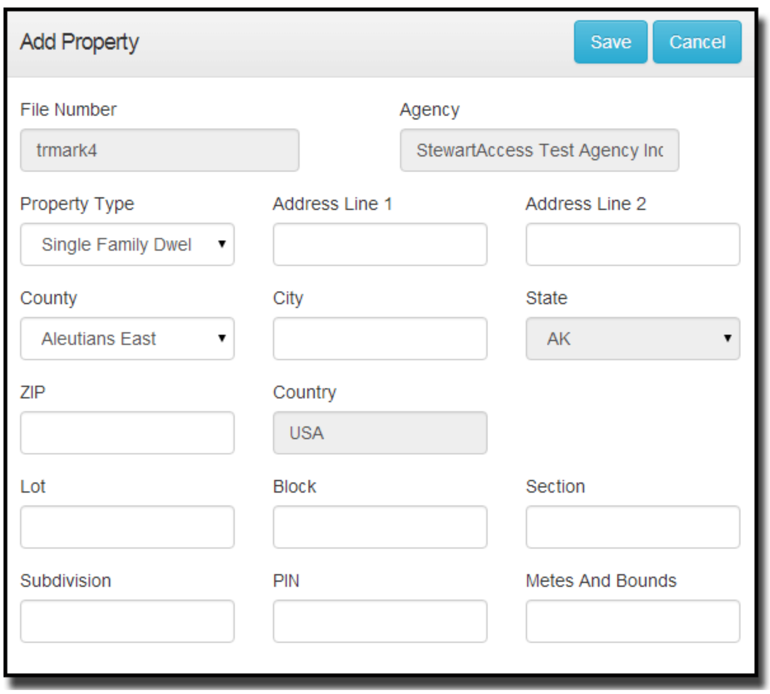
Property Address

Property Addresses are required to create a CPL. Complete these steps to add the Property Address.

Steps

1. Select the **Property** tab.
2. Click **Add** .

3. Enter the Property **Address**.



4. When finished, click **Save**.

Note

Multiple property addresses can be entered. To do, simply repeat steps 2 and 3.

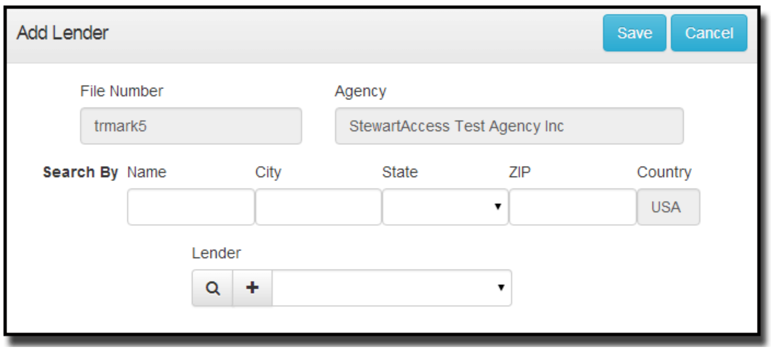
Lender

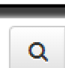
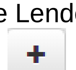
Lenders are required to create a CPL. Complete these steps to add a lender.

Steps

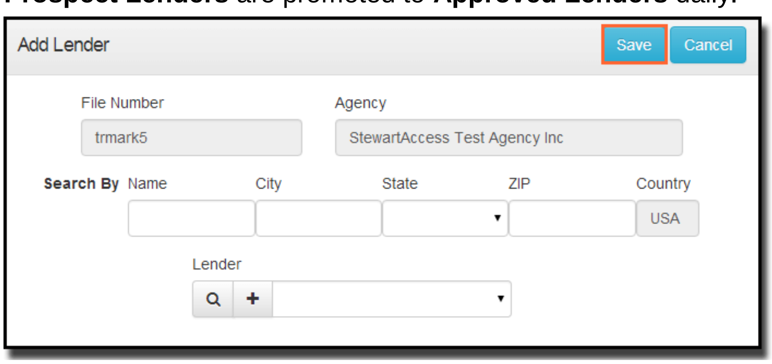
1. Select the **Lender** tab.
2. Click **Add** .

3. Enter the **Search By** criteria; **lender name**, **city**, **state** or **zip code**.



4. When finished, click **Search** . The system returns a list of **Approved Lenders**. These Lenders have been added to the Stewart Access database via a vetting process that ensures spelling accuracy, naming convention correctness and prevents duplicates.
5. Select the desired **Lender** from the **Approved Lender** list.
   If the Lender you want to work with is not listed, then you can manually enter the Lender information by clicking **Add**  and entering the information in the fields provided. To save your entries, click **Save**.

   Lenders entered manually become **Prospect Lenders** and will undergo the approval process outlined above. **Prospect Lenders** are promoted to **Approved Lenders** daily.

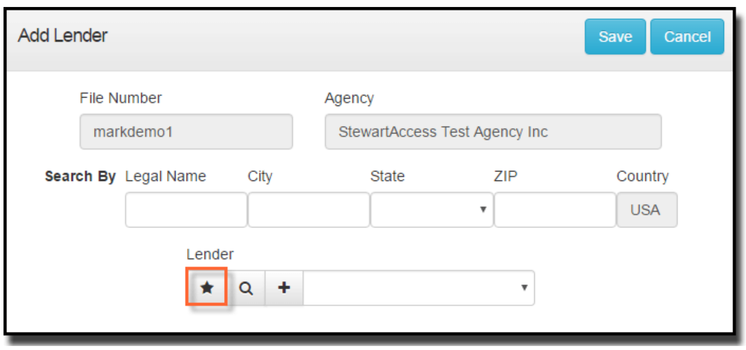


Note

You can add multiple lenders, simply repeat the steps above.

6. You can add or edit additional Lender information such as the **Loan Number**, **Attention To** and **Successor Language** by clicking **Edit** . You can also save a Lender as a Favorite by selecting the **Favorite** checkbox.
7. When finished, click **Save** to save your changes.

To select a Lender marked as a Favorite, click the **Star** icon and choose the Lender you want to work with from the list.



Additional Information

By default, the **Primary** checkbox is selected. A CPL must have a Primary Lender indicated. If there is more than one Lender on a file, only one can be marked *Primary*. The Lender may be selected as a “Favorite”. When marked, that Lender will appear at the top of the list. Only Approved Lenders may be saved as Favorites. If any information entered for a Lender requires editing after saving then delete the existing record and create another one.

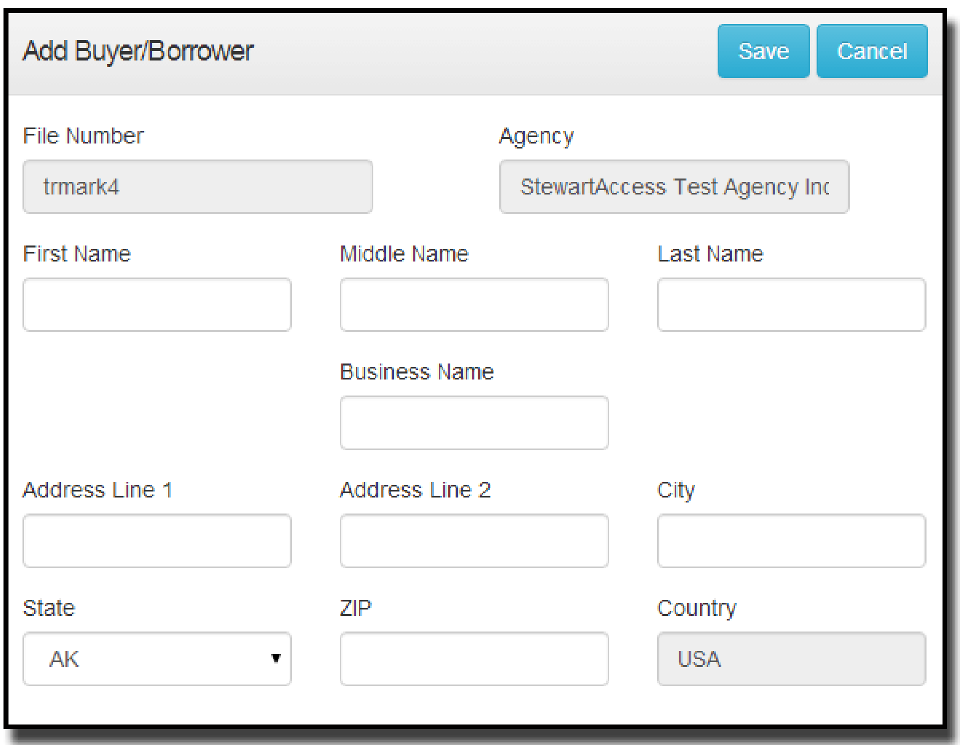
Buyer/Borrower

Complete these steps to add the buyer and/or borrower information.

Steps

1. Select the **Buyer/Borrower** tab.
2. Click **Add** .

3. Enter the Buyer/Borrower name or Business Name and Address.



4. Click **Save**.

Note

Multiple Buyer and/or Borrowers can be added. To do, simply repeat the above steps. If any information entered for a Buyer/Borrower requires editing (after clicking **Save**), delete the existing record and create another one.

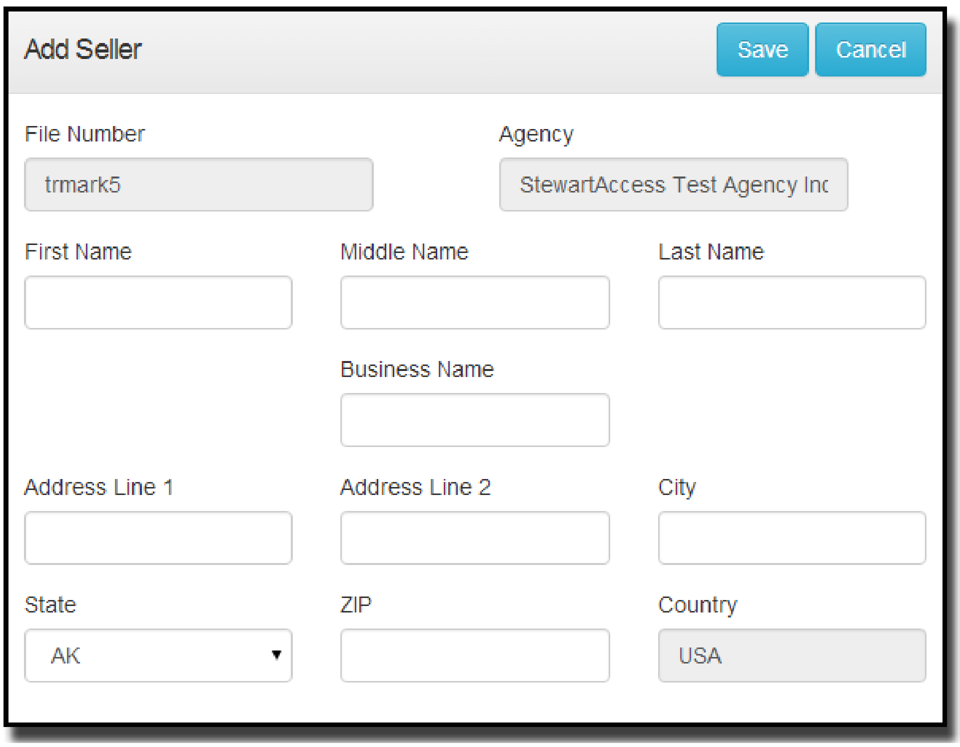
Seller

Complete these steps to add seller information.

Steps

1. Select the **Seller** tab.
2. Click **Add** .

3. Enter the Seller name or Business Name and **Add**ress.



4. Click **Save**.

Note

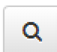
Multiple sellers can be added. To do, simply repeat the above steps. If any information entered for a Seller requires editing after clicking **Save**, delete the existing record and create another one.

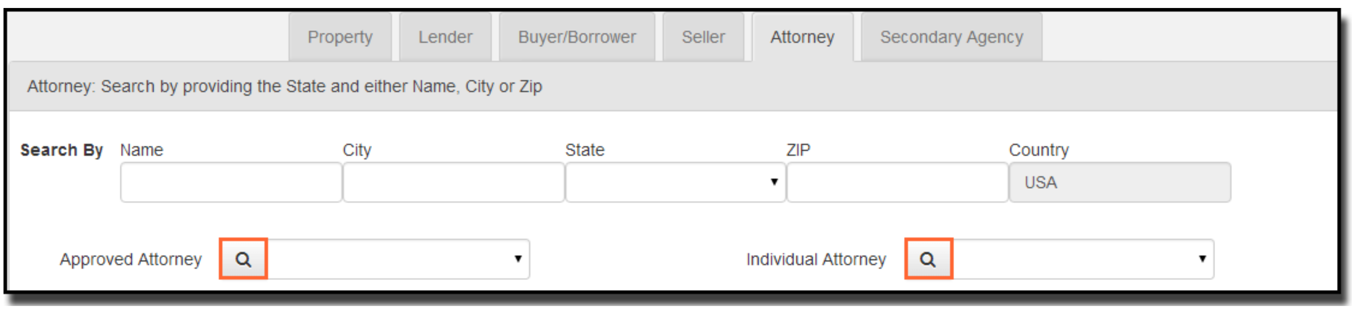
Attorney/Approved Attorney

Complete these steps to add an approved or individual attorney.

Steps

1. Select the **Attorney** tab, if needed.
2. Click **Add**. 

3. Enter **Search** By criteria.
4. Click **Search**. .
5. Select desired **Approved Attorney** or **Individual Attorney** from the list.



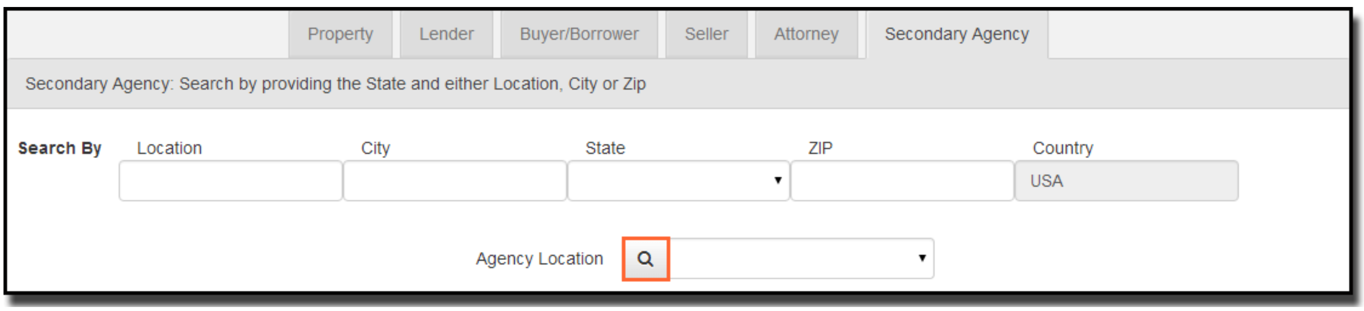
Secondary Agent

Complete these steps to add a Secondary agent.

Steps

1. Select the **Secondary Agency** tab, if needed.
2. Enter **Search By** criteria.
3. Click **Search**. 

4. Select desired **Secondary Agency** from the list.

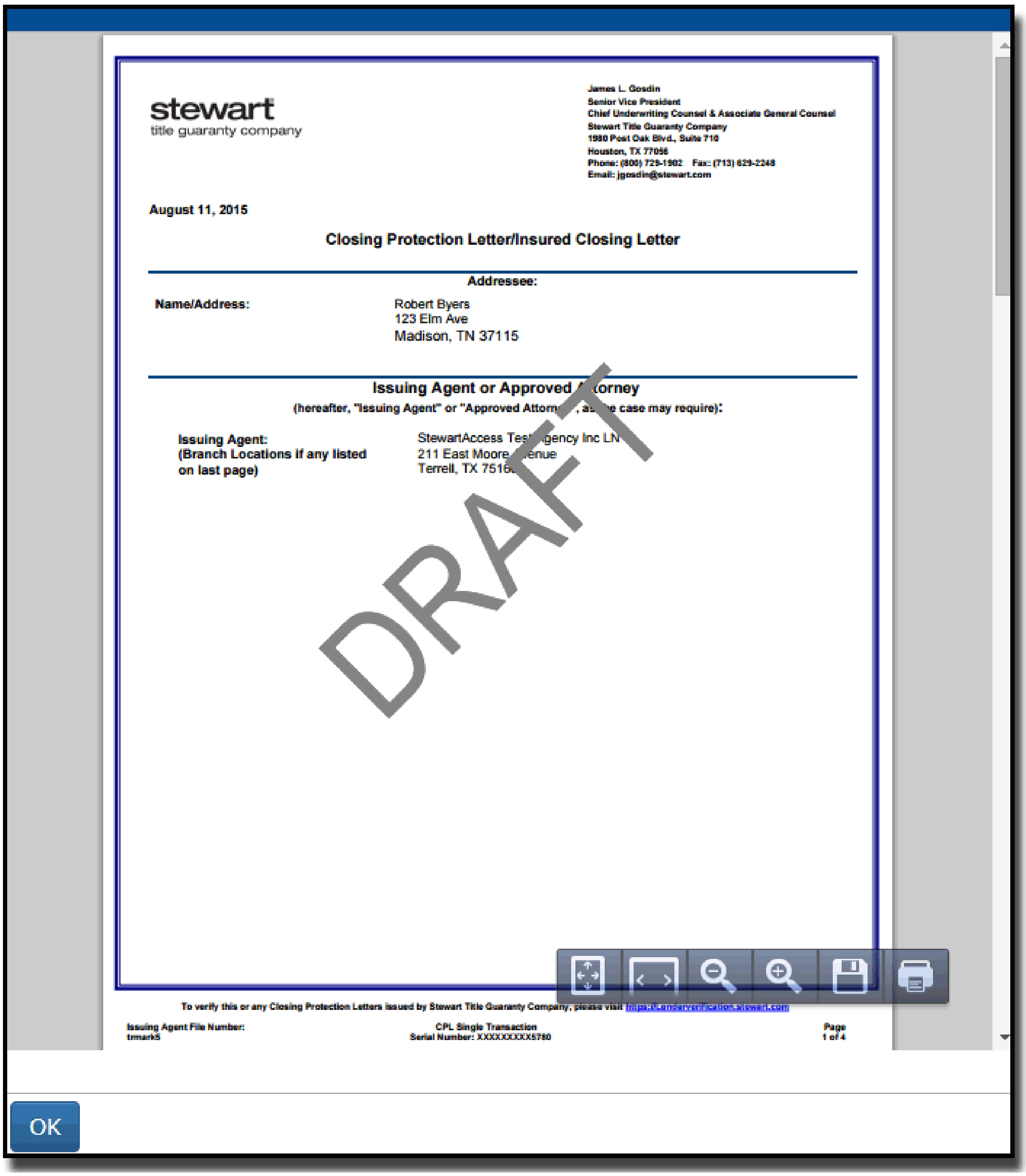


Printing a Draft

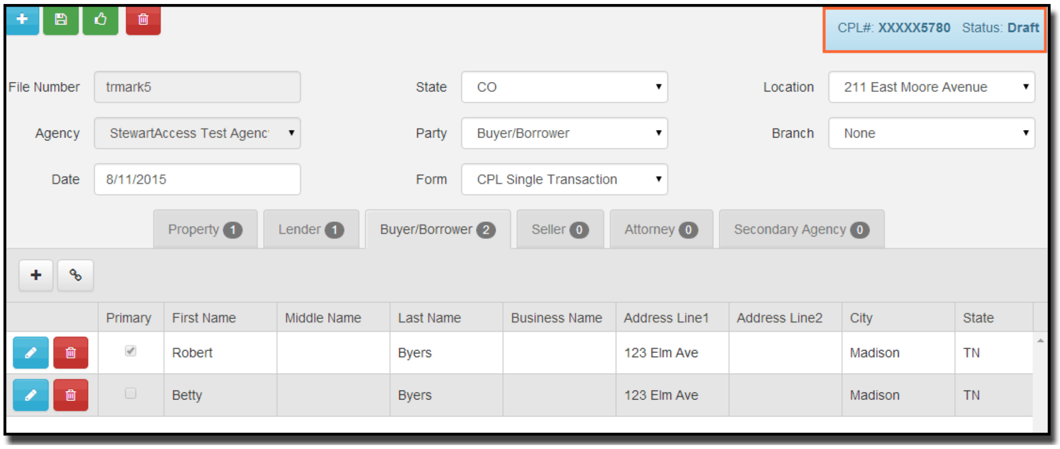
Complete these steps to print a draft copy of the CPL to review for accuracy.

Steps

1. Click **Save** to view a draft version of the CPL.



A CPL remains in draft mode until it is issued and the CPL serial number is masked until then as well.



Note

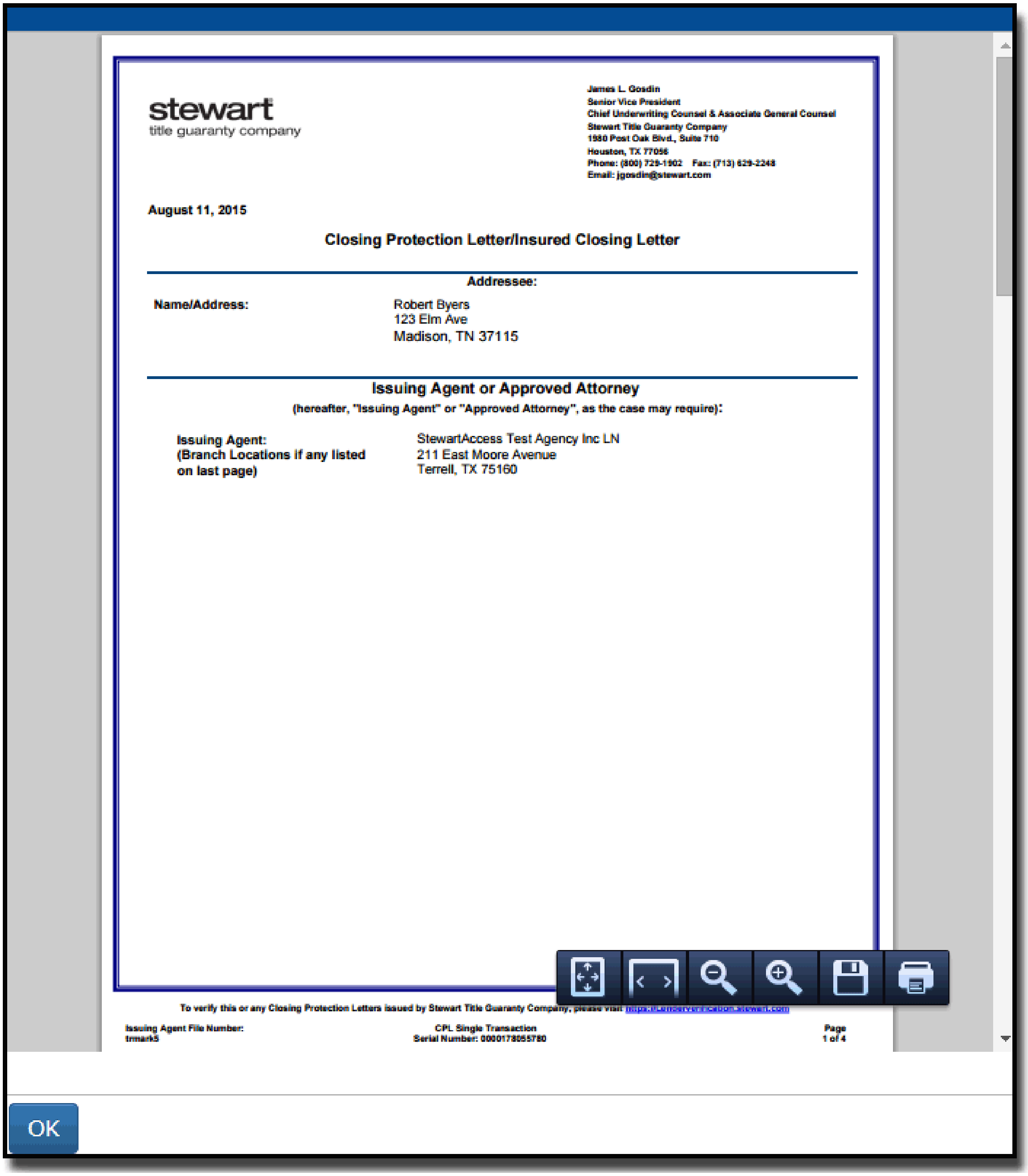
Notice the draft copy is watermarked, *DRAFT* and is removed when the CPL is issued.

Printing a CPL

Complete these steps to print a CPL.

Steps

1. Click **Generate** to issue the CPL.



Notice all CPLs are issued with a unique Stewart serial number that displays at the bottom of each page:

To cancel an existing CPL, click **Cancel** . This also cancels the generated serial number.

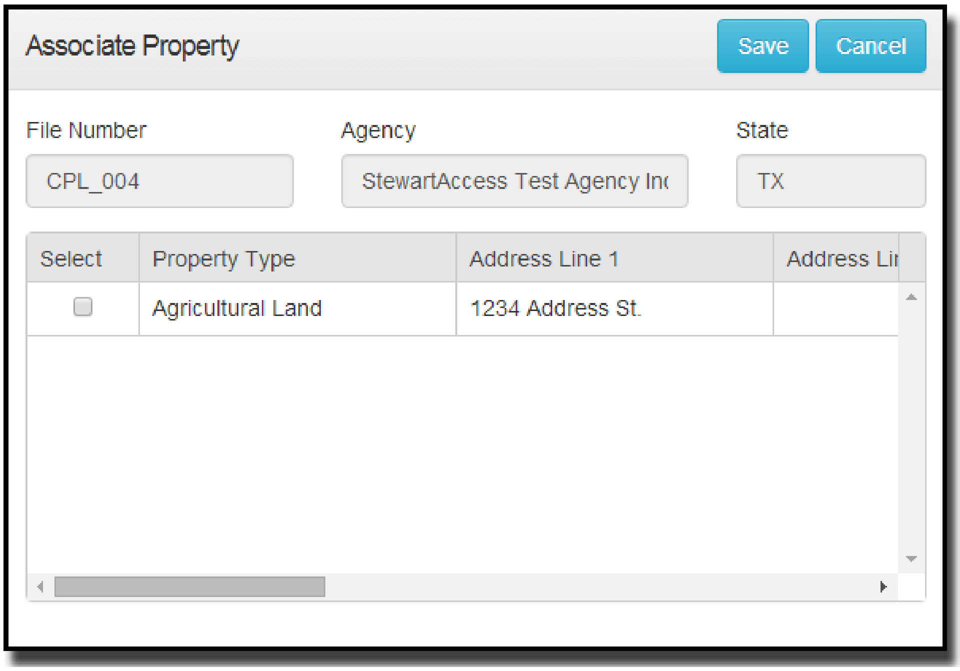
Note

If you need to re-issue a canceled CPL, follow the steps for [Creating a new CPL](#).

Associating

Once a record has been saved for a Property Address, Lender, Buyer/Borrower Name, Seller Name, Attorney, or Secondary Agent, it is available for "association". Use this feature to copy saved information into a record without re-keying.

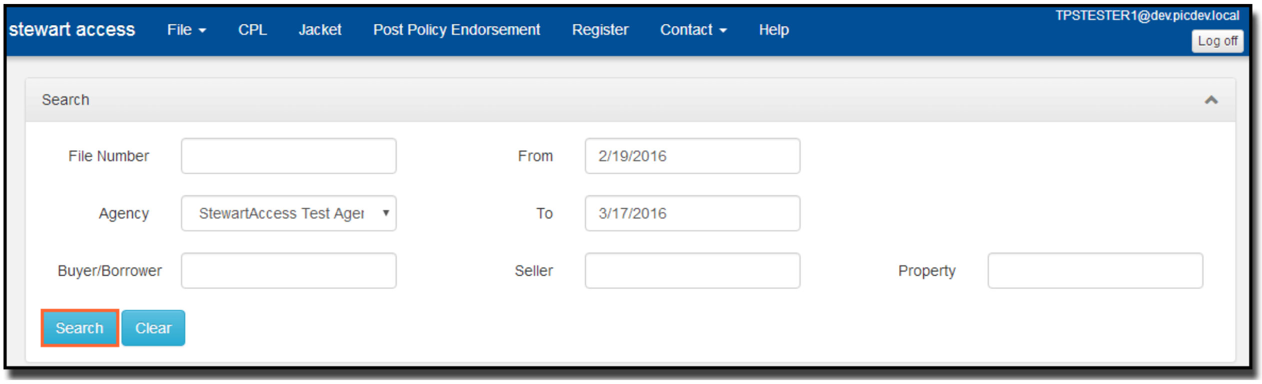
To associate a saved record, click the **Associate** icon  and choose a record. This is especially useful when creating a jacket after a CPL is generated.



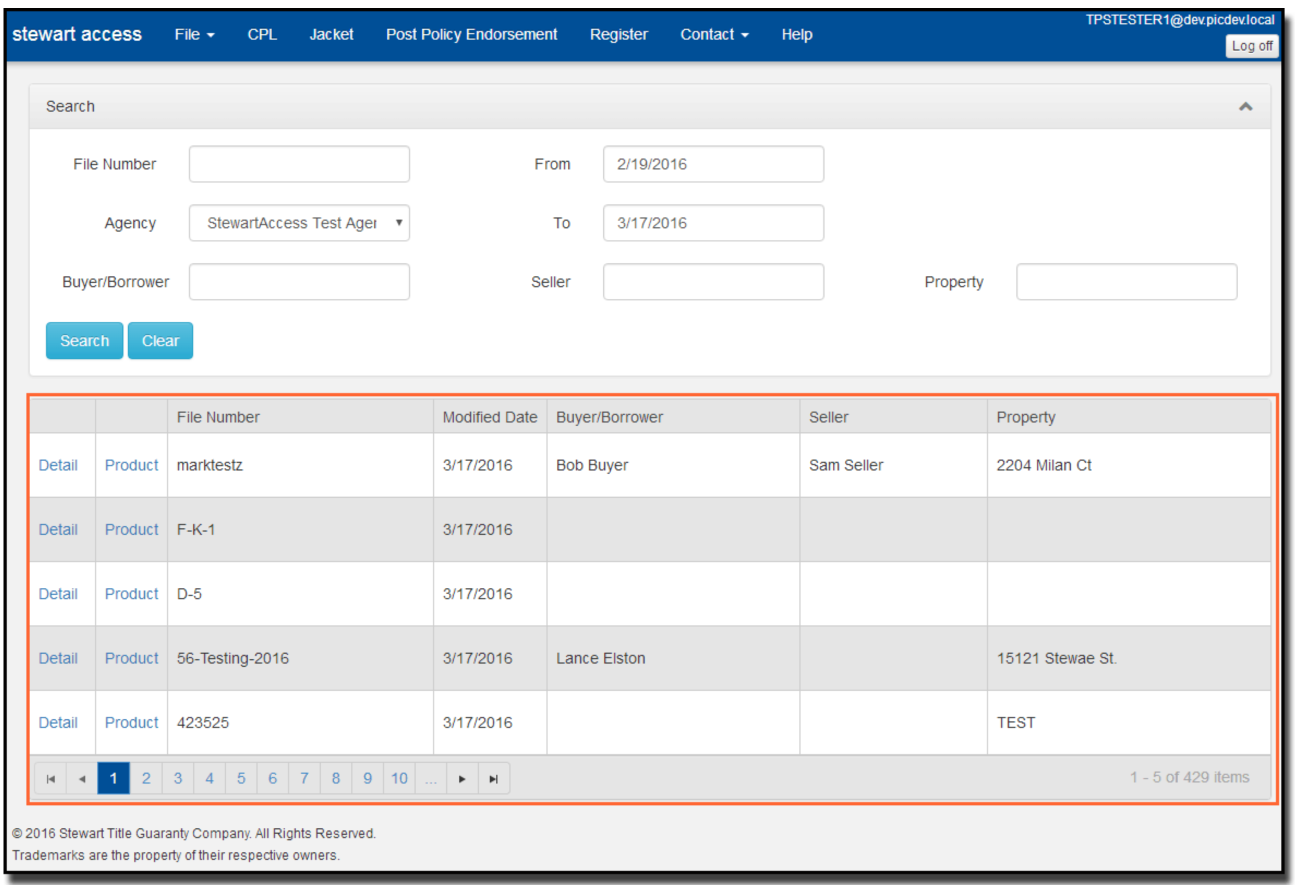
Searching

After logging in through the portal, the following *Search* window displays. This feature enables you to search for existing files with CPLs that have been created in Stewart Access Portal.

Enter your Search parameters and click **Search**. .



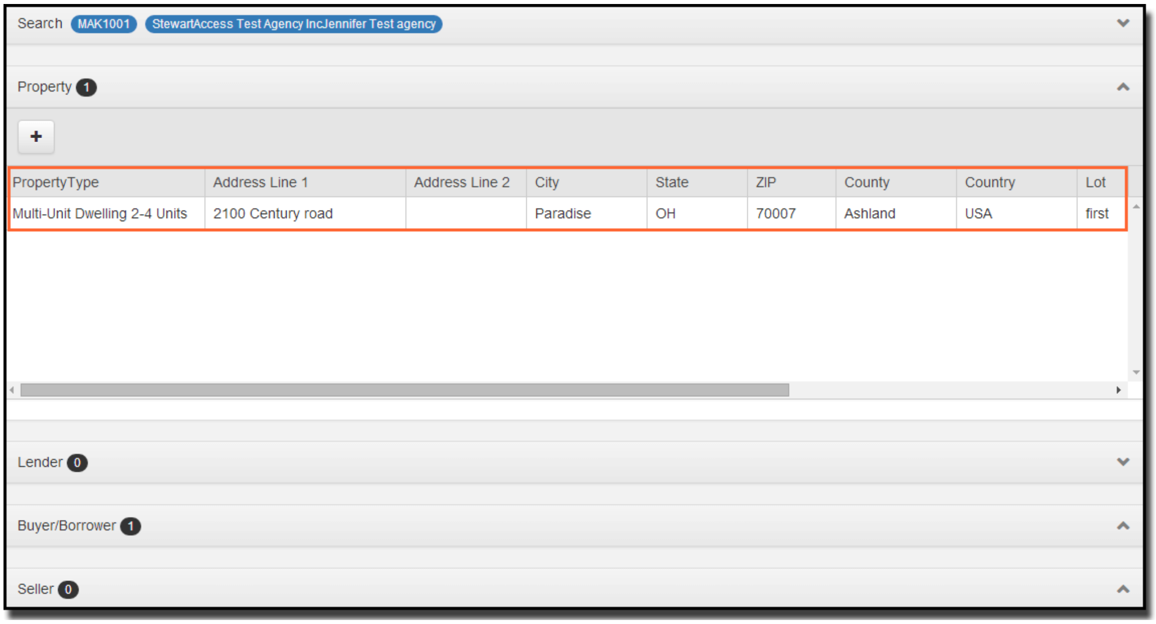
The **Search** results appear at the bottom of the **Search** window:



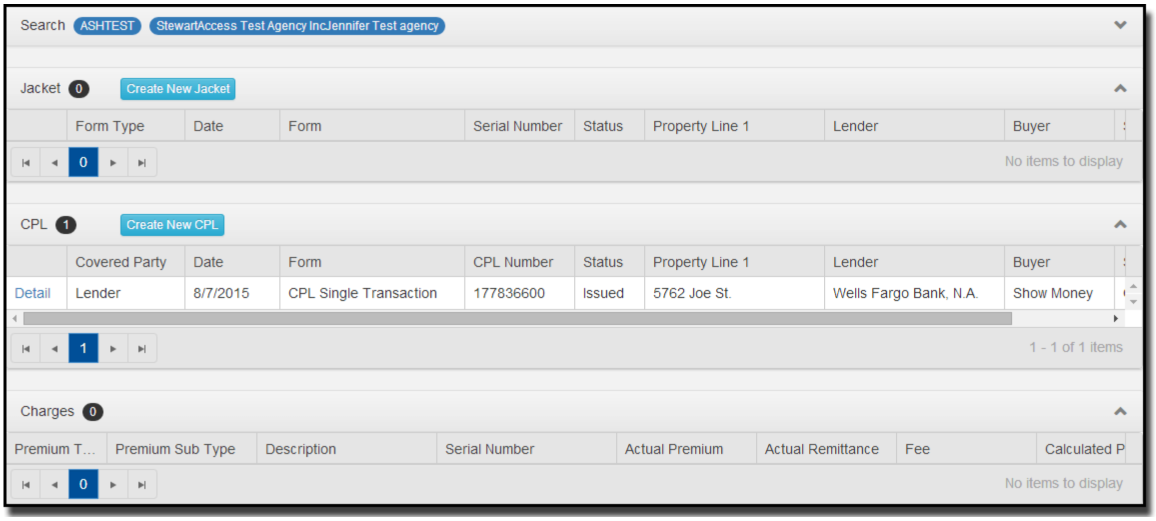
Selecting the **Detail** or **Product** links displays additional information on the file:

		File	Modified Date	Buyer Borrower	Seller	Property
Detail	Product	MAK1001	8/6/2015	John Smith		2100 Century road

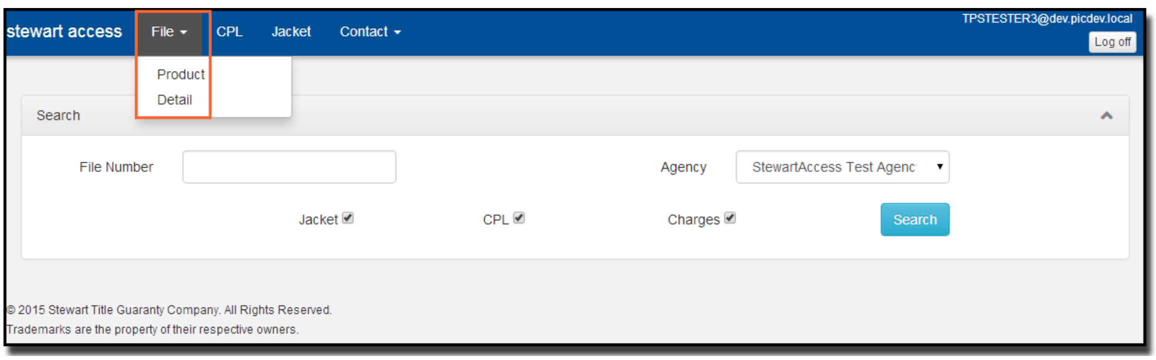
The **Detail** link provides a summary view of the Properties, Lenders, Buyer and Sellers for the selected file.



The **Products** link displays a summary of the created documents for the file selected.



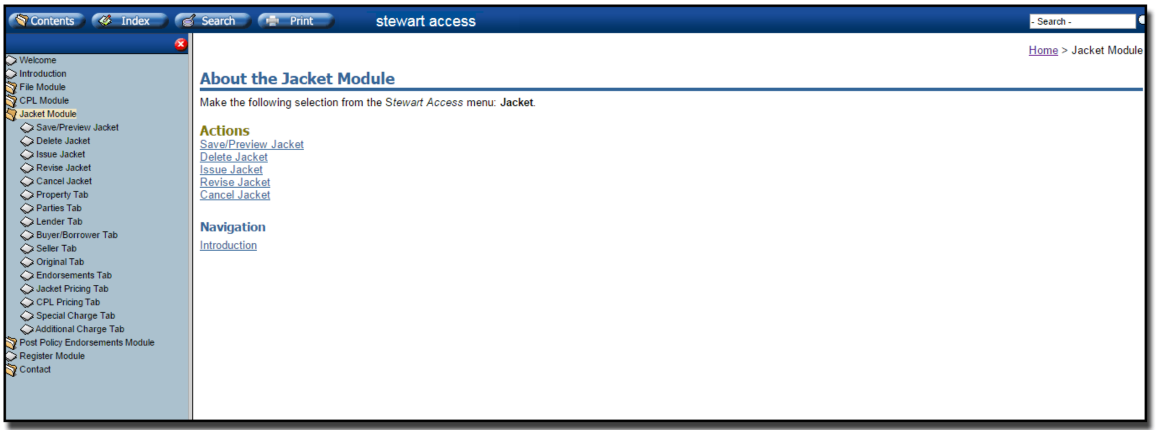
To search for *Details* and *Products* use the **File** menu at the top of the page and then select the option that best describes what you want to see:



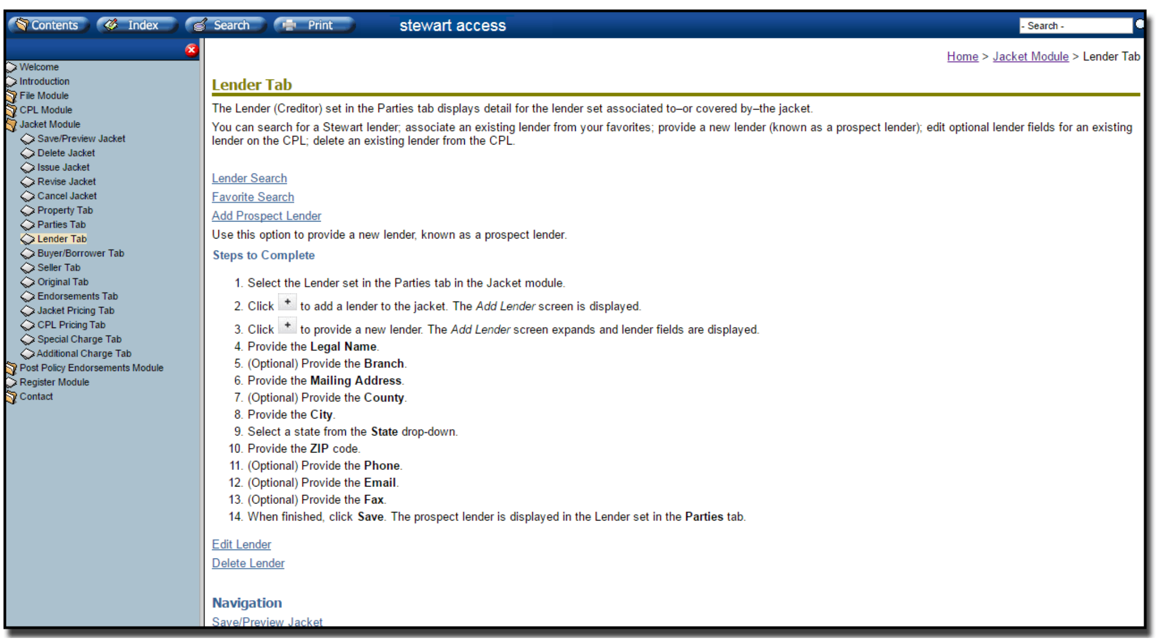
Help

Stewart Access is an intuitive software product that allows you to easily create Policy jackets and report policy information and includes a comprehensive Online Help system. To access Online Help, click **Help** from the main menu.

Use Help to select a topic of interest from the Table of Contents displayed in the left navigation pane or perform a keyword search using the **Search** button at the upper left of the screen.

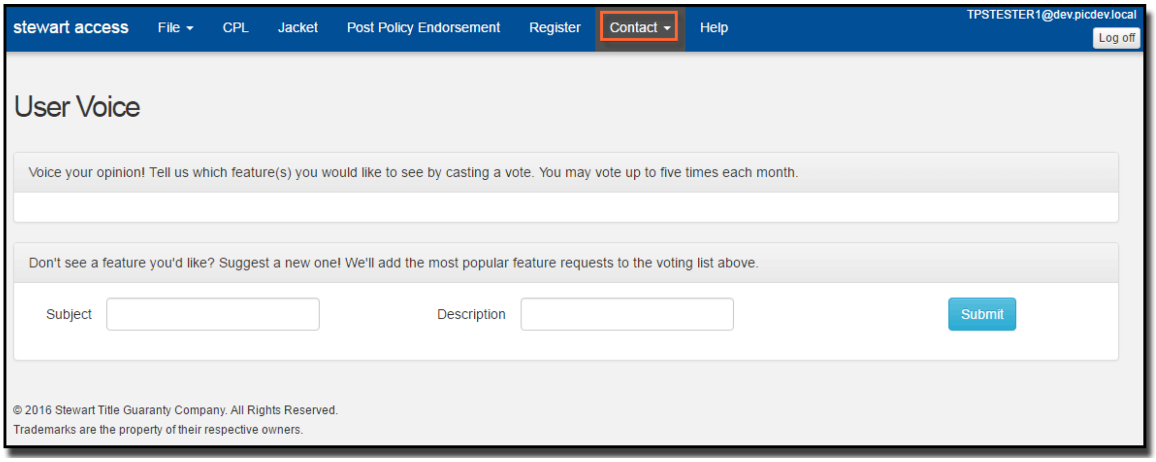


Selecting a topic from **Help** displays additional information and useful step-by-step instructions to walk you through how to complete a task.



Contact Us

Stewart Access provides a **User Voice** forum allowing you to easily communicate valuable feedback to Stewart regarding its software. To access this forum, select **Contact Us** from the top menu. Enter your feedback in the fields.



For additional assistance, please contact Stewart Customer Care Center. Contact information is provided from the **Contact** menu.