



Creating CPLs in Stewart Access Portal

Getting Started Guide

November 2016

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Table of Contents

Introduction	1
Browser Considerations	1
Getting Started	2
Search for a File	3
Creating a CPL	4
Property Address	5
Lender	6
Buyer/Borrower	8
Seller	9
Attorney/Approved Attorney	10
Secondary Agent	11
Printing a Draft	12
Printing a CPL	14
Associating	16
Searching	17
Help	20
Contact Us	21

Introduction

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

Browser Recommendations

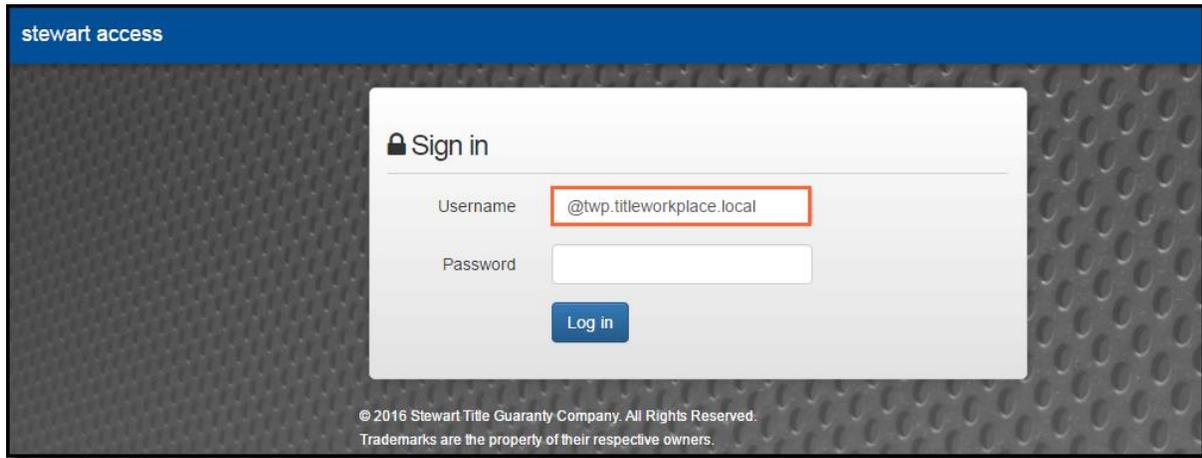
Stewart Access performs best with the latest versions of **Google Chrome** and **Internet Explorer**. For optimal performance, **Firefox** is *not recommended*.

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.

		File Number	Modified Date	Buyer/Borrower	Seller	Property
Detail	Product	Demo_004	9/28/2016	Lance Elston	Elizabeth Elston	12343 Street Name St.
Detail	Product	marktraining1	9/28/2016	Robert Byers		2204 Milan Ct
Detail	Product	File	9/28/2016	Matt Smith	Tomas Gomez	fgsdfg
Detail	Product	File	9/28/2016	vb		
Detail	Product	Adjust_456	9/28/2016	Renita Hargrave	Elizabeth Elston	12345 Street Name St.

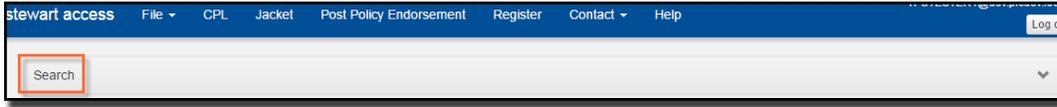
- To view basic file information such as *Parties*, *Property Address* and *Lender* information, click the **Detail** link.
- To view file production information such as *CPLs*, *Policies*, *Post Policy Endorsements*, and *File Charges*, click the **Product** link.

Search for a File

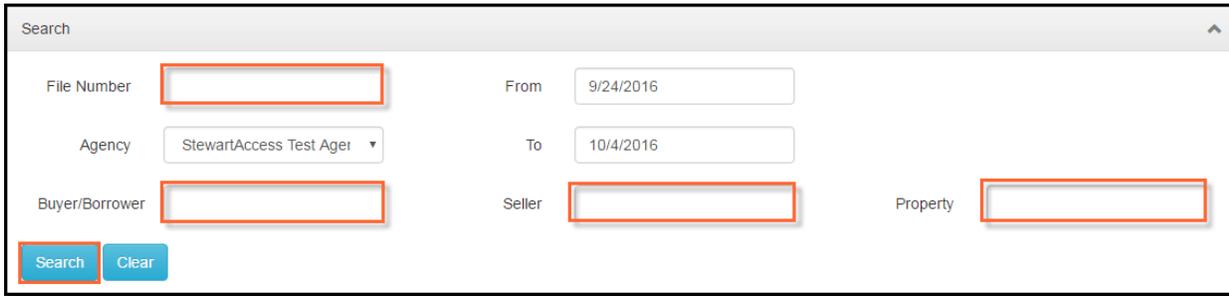
Complete these steps to search for a file.

Steps

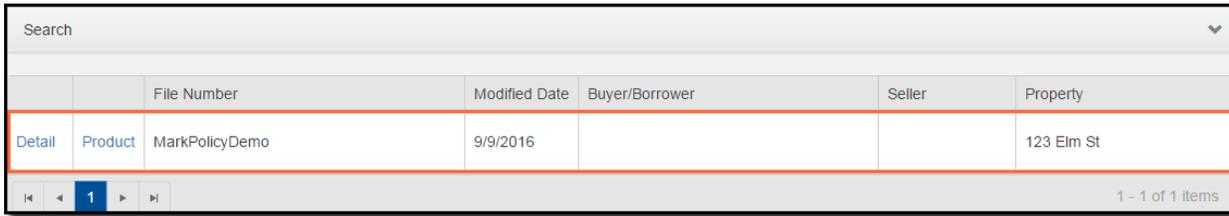
1. To search for an existing file, click **Search**. Additional search fields display.



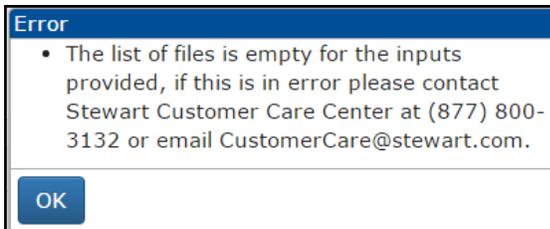
2. Enter Search parameters. You may search by File Number, Buyer/Borrower, Seller or Property.

A screenshot of the search form. The form contains several input fields: 'File Number', 'Agency' (a dropdown menu with 'StewartAccess Test Ager' selected), 'From' (with '9/24/2016' entered), 'To' (with '10/4/2016' entered), 'Buyer/Borrower', 'Seller', and 'Property'. The 'Search' and 'Clear' buttons are at the bottom left. Red boxes highlight the 'File Number', 'Buyer/Borrower', 'Seller', and 'Property' input fields.

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

A screenshot of the search results table. The table has columns for 'Detail', 'Product', 'File Number', 'Modified Date', 'Buyer/Borrower', 'Seller', and 'Property'. The first row contains the following data: 'Detail', 'Product', 'MarkPolicyDemo', '9/9/2016', an empty 'Buyer/Borrower' field, an empty 'Seller' field, and '123 Elm St'. The table is highlighted with a red border. At the bottom right, it says '1 - 1 of 1 items'.

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

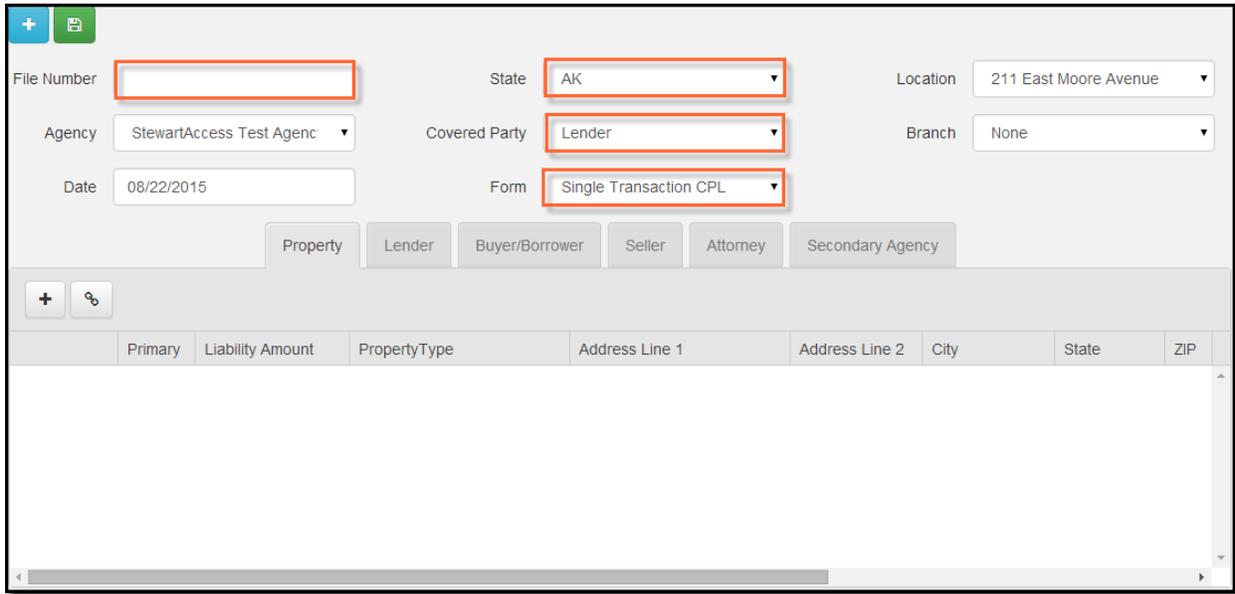
Complete these steps to create a CPL within the Stewart Access Portal.

Steps

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

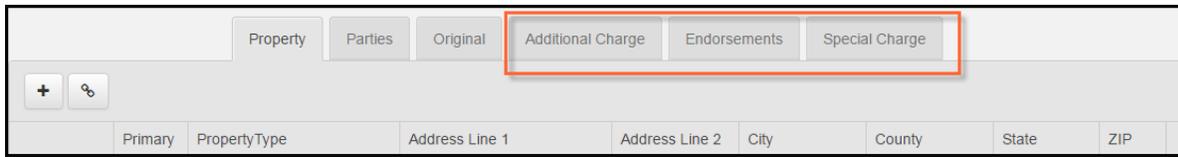


2. Enter the **File Number**, **State**, **Covered Party**, and **Form**.

A screenshot of the CPL creation form. The form has several input fields and dropdown menus. The 'File Number' field is empty and highlighted with a red box. The 'State' dropdown is set to 'AK' and highlighted with a red box. The 'Covered Party' dropdown is set to 'Lender' and highlighted with a red box. The 'Form' dropdown is set to 'Single Transaction CPL' and highlighted with a red box. Other fields include 'Agency' (StewartAccess Test Agenc), 'Date' (08/22/2015), 'Location' (211 East Moore Avenue), and 'Branch' (None). Below the form are tabs for 'Property', 'Lender', 'Buyer/Borrower', 'Seller', 'Attorney', and 'Secondary Agency'. At the bottom, there is a table with columns: Primary, Liability Amount, PropertyType, Address Line 1, Address Line 2, City, State, and ZIP.

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:

A screenshot of the CPL creation form showing additional tabs. The tabs are 'Property', 'Parties', 'Original', 'Additional Charge', 'Endorsements', and 'Special Charge'. The 'Additional Charge', 'Endorsements', and 'Special Charge' tabs are highlighted with a red box. Below the tabs is a table with columns: Primary, PropertyType, Address Line 1, Address Line 2, City, County, State, and ZIP.

Property Address

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

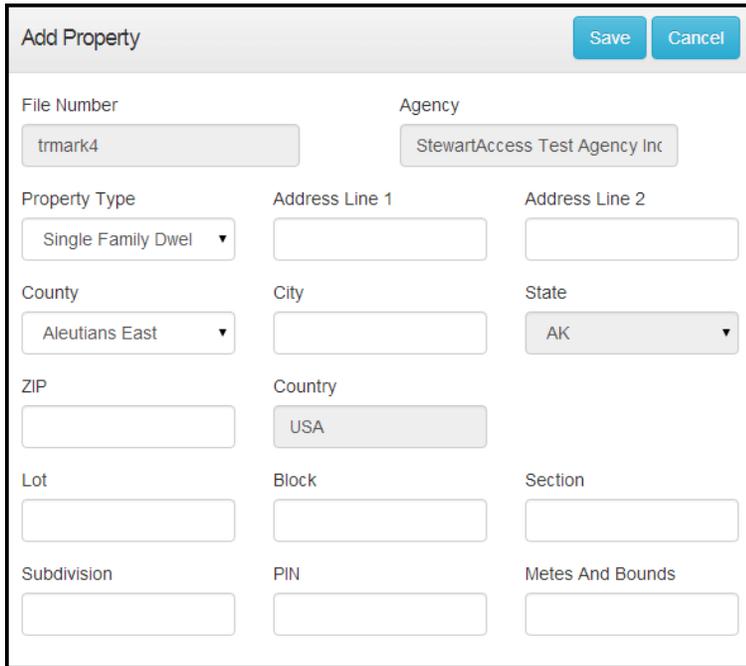
Steps

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



The screenshot shows a horizontal navigation bar with tabs: Property, Lender, Buyer/Borrower, Seller, Attorney, and Secondary Agency. The 'Property' tab is selected and highlighted with a red box. Below the tabs is a large grey area with a red box around a plus sign (+) button. Below this area is a table with columns: PropertyType, Address Line 1, Address Line 2, City, State, ZIP, County, Country, and Lc.

3. Enter the Property **Address**.



The 'Add Property' form contains the following fields:

- File Number: trmark4
- Agency: StewartAccess Test Agency Inc
- Property Type: Single Family Dwel (dropdown)
- Address Line 1: [text input]
- Address Line 2: [text input]
- County: Aleutians East (dropdown)
- City: [text input]
- State: AK (dropdown)
- ZIP: [text input]
- Country: USA (dropdown)
- Lot: [text input]
- Block: [text input]
- Section: [text input]
- Subdivision: [text input]
- PIN: [text input]
- Metes And Bounds: [text input]

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



Note

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

Lender

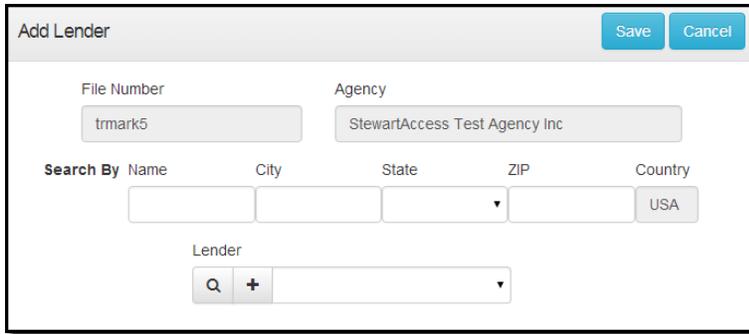
Lenders are required to create a CPL. Complete these steps to add a lender.

Steps

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

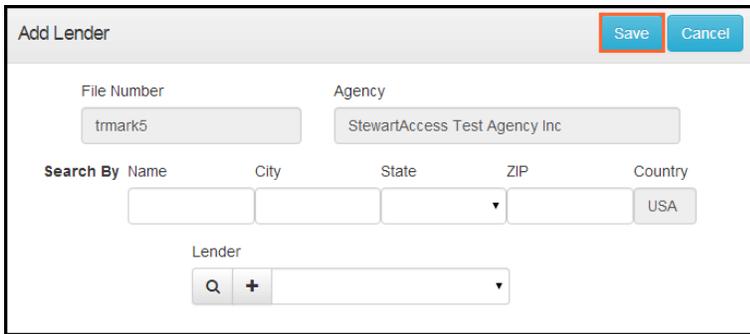


3. Enter the **Search By** criteria; **lender name, city, state or zip code**.



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.

- 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.
- When finished, click **Save**  to save your changes.

		Property	Lender	Buyer/Borrower	Seller	Attorney	Secondary Agency		
+ 🔗		Primary	Favorite	Loan Number	Attention To	Successor Language	Legal Name	BranchName	MailingAddress
		<input checked="" type="checkbox"/>	<input type="checkbox"/>				Wells Fargo ...	TANGLEWOOD RANDALL'S	5161 San Fel

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

Add Lender

File Number: Agency:

Search By: Legal Name City State ZIP Country

Lender: 

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

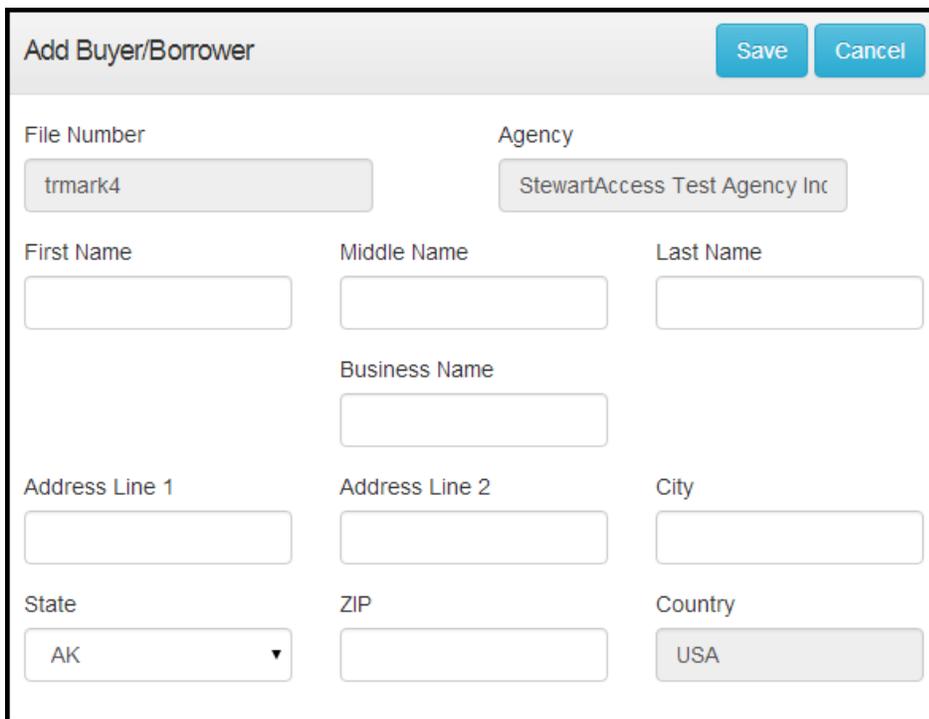
1. Select the **Buyer/Borrower** tab.

2. Click **Add** .



A screenshot of a software interface showing a tabbed menu with options: Property, Lender, Buyer/Borrower, Seller, Attorney, and Secondary Agency. The 'Buyer/Borrower' tab is highlighted with a red box. Below the tabs is a large grey button with a plus sign (+) inside a red box. Underneath the button is a form with fields for PropertyType, Address Line 1, Address Line 2, City, State, ZIP, County, Country, and Lc.

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



A screenshot of the 'Add Buyer/Borrower' form. The form has a title bar with 'Add Buyer/Borrower' and 'Save' and 'Cancel' buttons. The form contains the following fields:

- File Number: tmark4
- Agency: StewartAccess Test Agency Inc
- First Name: [empty]
- Middle Name: [empty]
- Last Name: [empty]
- Business Name: [empty]
- Address Line 1: [empty]
- Address Line 2: [empty]
- City: [empty]
- State: AK (dropdown menu)
- ZIP: [empty]
- Country: USA

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.

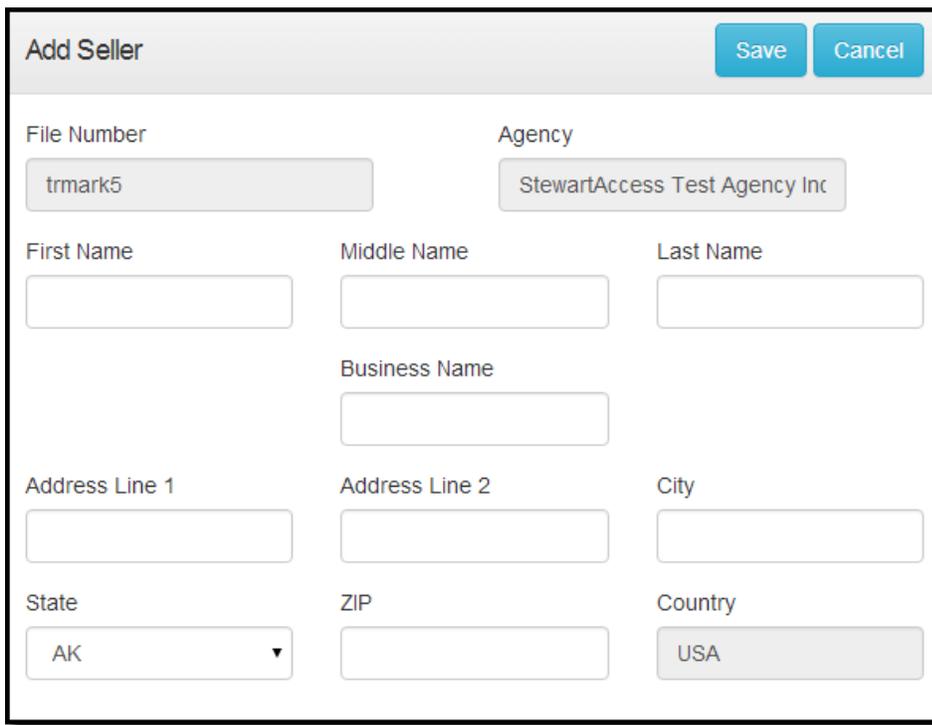
Steps

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



The screenshot shows a horizontal tabbed interface with tabs for 'Property', 'Lender', 'Buyer/Borrower', 'Seller', 'Attorney', and 'Secondary Agency'. The 'Seller' tab is selected and highlighted with a red box. Below the tabs is a large grey button with a white plus sign, also highlighted with a red box. Below this button is a row of input fields for 'PropertyType', 'Address Line 1', 'Address Line 2', 'City', 'State', 'ZIP', 'County', 'Country', and 'Lc'.

3. Enter the Seller name or Business Name and **Address**.



The 'Add Seller' form is displayed with a 'Save' and 'Cancel' button in the top right corner. The form contains the following fields:

- File Number:** Input field containing 'tmark5'.
- Agency:** Input field containing 'StewartAccess Test Agency Inc'.
- First Name:** Empty input field.
- Middle Name:** Empty input field.
- Last Name:** Empty input field.
- Business Name:** Empty input field.
- Address Line 1:** Empty input field.
- Address Line 2:** Empty input field.
- City:** Empty input field.
- State:** Dropdown menu showing 'AK'.
- ZIP:** Empty input field.
- Country:** Input field containing 'USA'.

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**. 

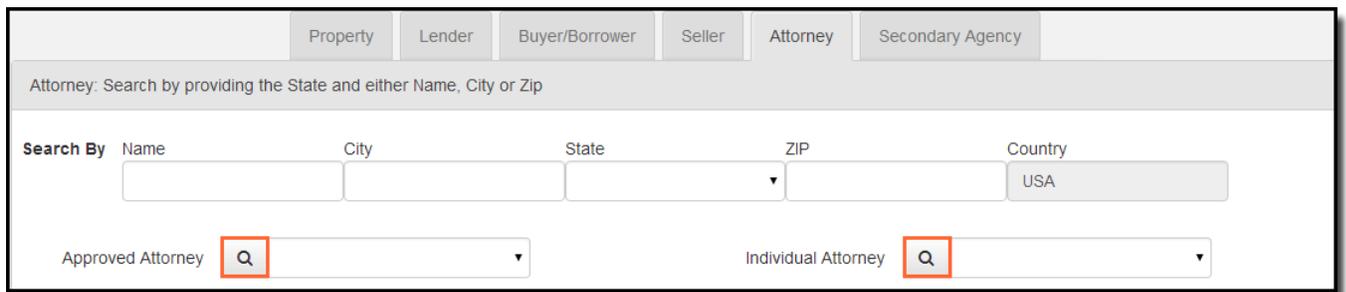


The screenshot shows a navigation bar with tabs: Property, Lender, Buyer/Borrower, Seller, Attorney, and Secondary Agency. The Attorney tab is selected and highlighted with a red box. Below the navigation bar is a large grey button with a plus sign (+) also highlighted with a red box. Below the button is a table with columns: PropertyType, Address Line 1, Address Line 2, City, State, ZIP, County, Country, and Lc.

3. Enter **Search By** criteria.

4. Click **Search**. 

5. Select desired **Approved Attorney** or **Individual Attorney** from the list.



The screenshot shows the search interface for the Attorney tab. It includes a header with tabs: Property, Lender, Buyer/Borrower, Seller, Attorney, and Secondary Agency. Below the tabs is a search instruction: "Attorney: Search by providing the State and either Name, City or Zip". The search form has a "Search By" section with fields for Name, City, State (a dropdown menu), ZIP, and Country (a dropdown menu with "USA" selected). Below the search fields are two selection options: "Approved Attorney" and "Individual Attorney", each with a search button icon (Q) and a dropdown arrow.

Secondary Agent

Complete these steps to add a Secondary agent.

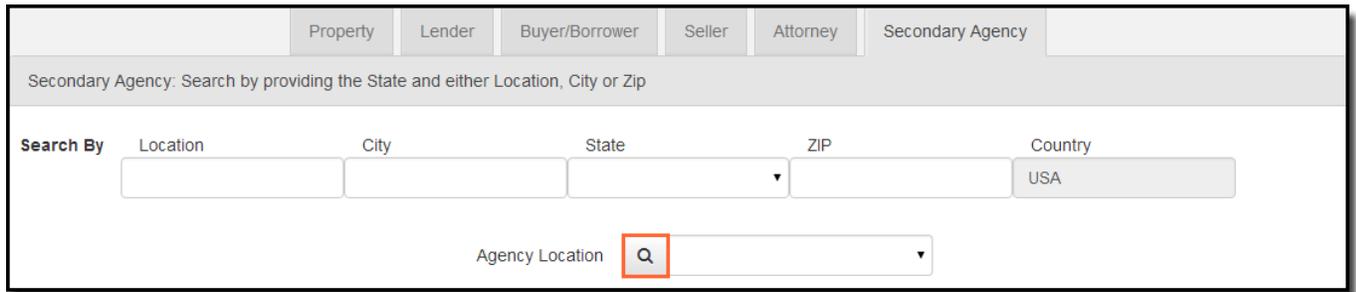
Steps

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



PropertyType	Address Line 1	Address Line 2	City	State	ZIP	County	Country	Lc
--------------	----------------	----------------	------	-------	-----	--------	---------	----

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



Secondary Agency. Search by providing the State and either Location, City or Zip

Search By Location City State ZIP Country

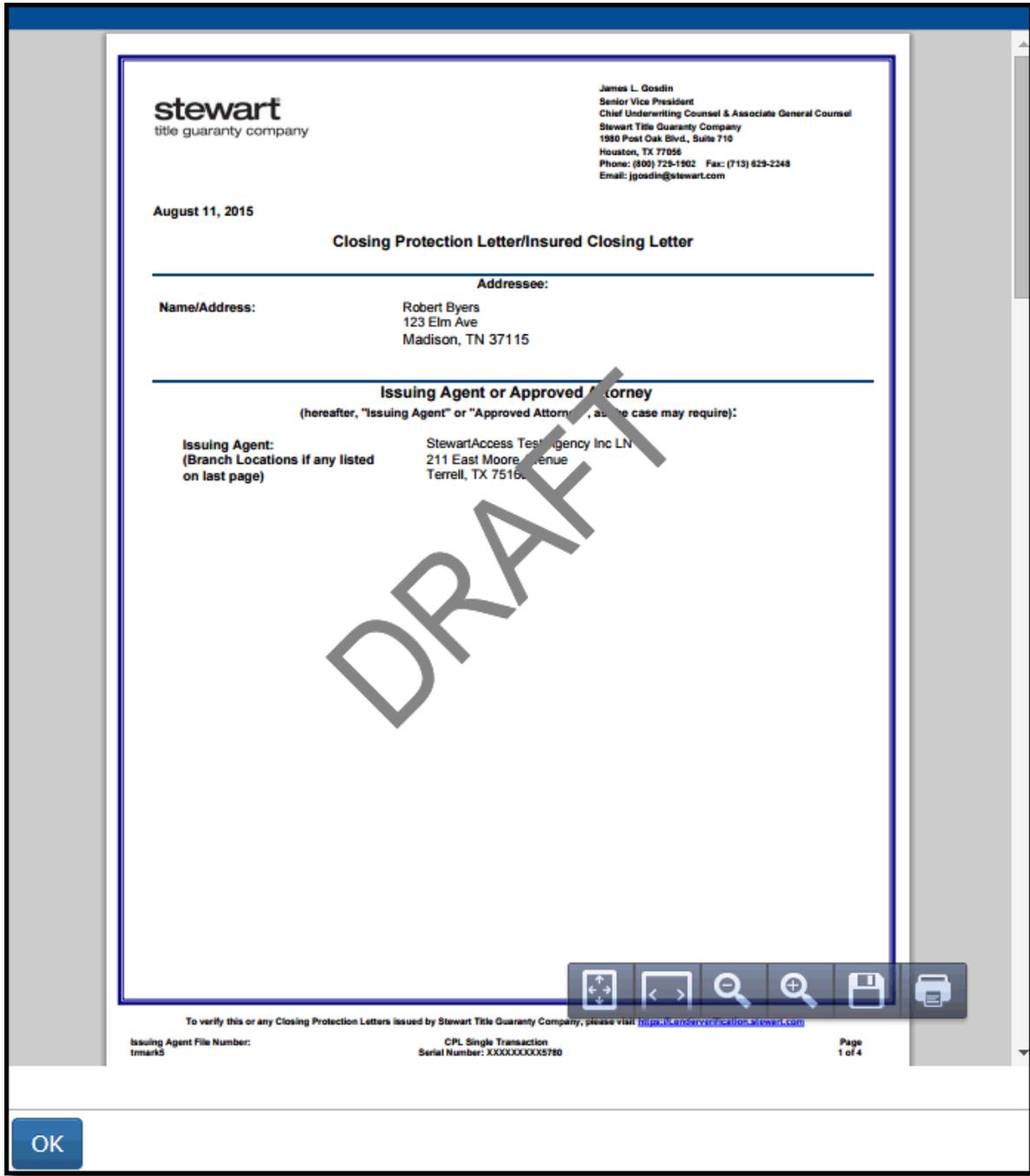
Agency Location 

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.



The screenshot shows a draft document titled "Closing Protection Letter/Insured Closing Letter" from Stewart Title Guaranty Company. The document is dated August 11, 2015, and is addressed to Robert Byers at 123 Elm Ave, Madison, TN 37115. The issuing agent is StewartAccess Test Agency Inc LN, located at 211 East Moore Avenue, Terrell, TX 75160. A large "DRAFT" watermark is overlaid on the document. At the bottom, there is a toolbar with icons for zooming, saving, and printing, along with a footer containing the issuing agent file number (tmark5), the CPL Single Transaction Serial Number (XXXXXXXXX5780), and the page number (Page 1 of 4). An "OK" button is visible in the bottom left corner of the window.

stewart
title guaranty company

James L. Gosdin
Senior Vice President
Chief Underwriting Counsel & Associate General Counsel
Stewart Title Guaranty Company
1980 Post Oak Blvd., Suite 710
Houston, TX 77056
Phone: (800) 725-1902 Fax: (713) 629-2248
Email: jgosdin@stewart.com

August 11, 2015

Closing Protection Letter/Insured Closing Letter

Addressee:

Name/Address: Robert Byers
123 Elm Ave
Madison, TN 37115

Issuing Agent or Approved Attorney
(hereafter, "Issuing Agent" or "Approved Attorney", as the case may require):

Issuing Agent: StewartAccess Test Agency Inc LN
(Branch Locations if any listed on last page) 211 East Moore Avenue
Terrell, TX 75160

To verify this or any Closing Protection Letters issued by Stewart Title Guaranty Company, please visit <http://plm.stewart.com>

Issuing Agent File Number: tmark5
CPL Single Transaction Serial Number: XXXXXXXXX5780
Page 1 of 4

OK

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

+

CPL#: XXXXX5780 Status: Draft

File Number

State

Location

Agency

Party

Branch

Date

Form

Property **1**Lender **1**Buyer/Borrower **2**Seller **0**Attorney **0**Secondary Agency **0**

+

	Primary	First Name	Middle Name	Last Name	Business Name	Address Line1	Address Line2	City	State
	<input checked="" type="checkbox"/>	Robert		Byers		123 Elm Ave		Madison	TN
	<input type="checkbox"/>	Betty		Byers		123 Elm Ave		Madison	TN



Note

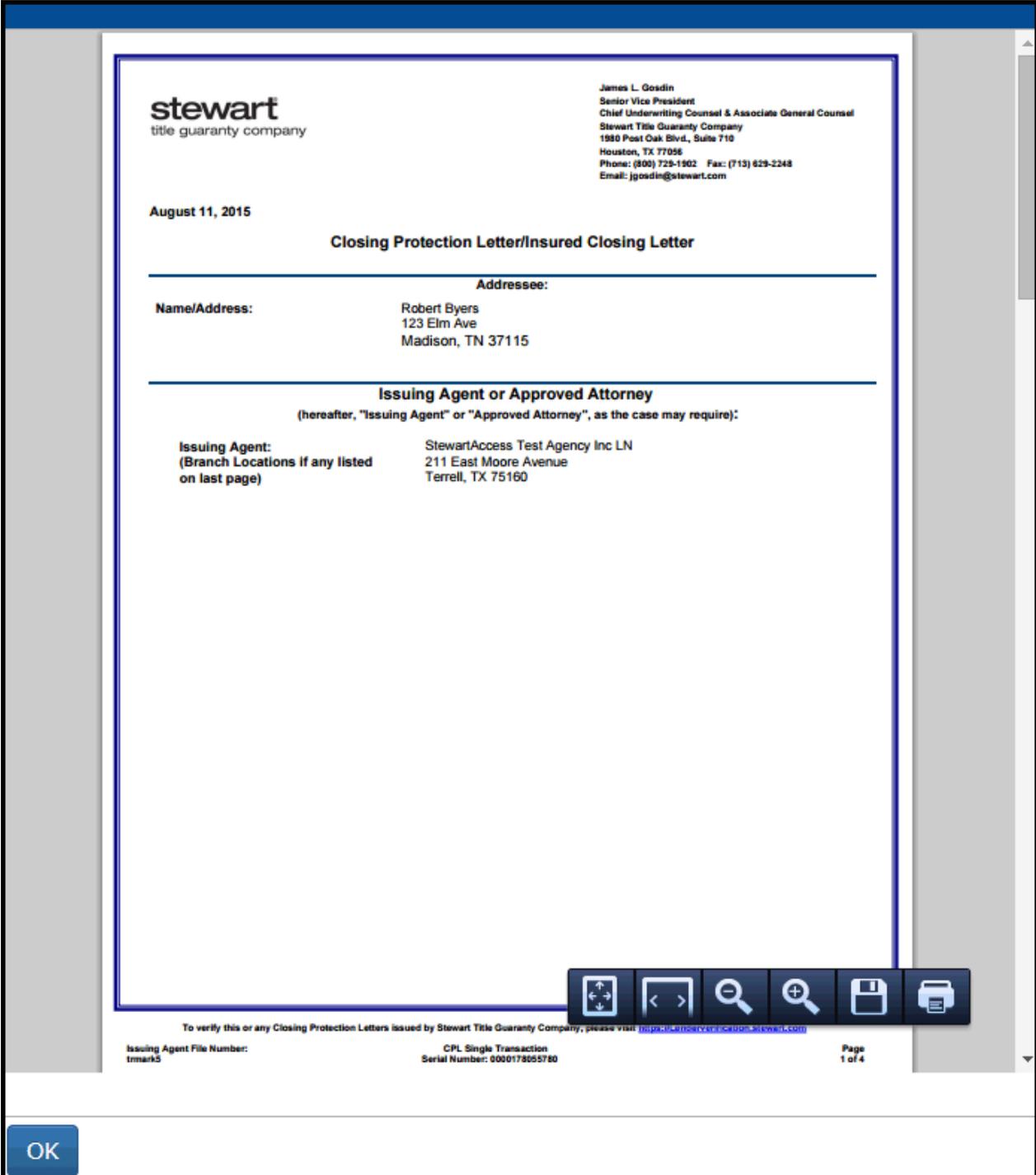
Notice the draft copy is watermarked, *DRAFT* and is removed when the CPL is issued.

Printing a CPL

Complete these steps to print a CPL.

Steps

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



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title guaranty company

James L. Gosdin
Senior Vice President
Chief Underwriting Counsel & Associate General Counsel
Stewart Title Guaranty Company
1980 Post Oak Blvd., Suite 710
Houston, TX 77056
Phone: (800) 725-1802 Fax: (713) 629-2248
Email: jgosdin@stewart.com

August 11, 2015

Closing Protection Letter/Insured Closing Letter

Addressee:

Name/Address: Robert Byers
123 Elm Ave
Madison, TN 37115

Issuing Agent or Approved Attorney
(hereafter, "Issuing Agent" or "Approved Attorney", as the case may require):

Issuing Agent: StewartAccess Test Agency Inc LN
(Branch Locations if any listed on last page) 211 East Moore Avenue
Terrell, TX 75160

To verify this or any Closing Protection Letters issued by Stewart Title Guaranty Company, please visit: <http://stewarttitle.com/verify>

Issuing Agent File Number: tmark5
CPL Single Transaction Serial Number: 0000178055780

Page 1 of 4

OK

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

CPL Single Transaction
Serial Number: 0000178055780

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.

Associate Property Save Cancel

File Number: Agency: State:

Select	Property Type	Address Line 1	Address Lin
<input type="checkbox"/>	Agricultural Land	1234 Address St.	

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**.

stewart access File CPL Jacket Post Policy Endorsement Register Contact Help TPSTESTER1@devpicdev.local Log off

Search

File Number From

Agency To

Buyer/Borrower Seller Property

Search Clear

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

stewart access File CPL Jacket Post Policy Endorsement Register Contact Help TPSTESTER1@devpicdev.local Log off

Search

File Number From

Agency To

Buyer/Borrower Seller Property

Search Clear

		File Number	Modified Date	Buyer/Borrower	Seller	Property
Detail	Product	marktestz	3/17/2016	Bob Buyer	Sam Seller	2204 Milan Ct
Detail	Product	F-K-1	3/17/2016			
Detail	Product	D-5	3/17/2016			
Detail	Product	56-Testing-2016	3/17/2016	Lance Elston		15121 Stewae St.
Detail	Product	423525	3/17/2016			TEST

1 2 3 4 5 6 7 8 9 10 ... 1 - 5 of 429 items

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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.

Search MAK1001 StewartAccess Test Agency IncJennifer Test agency ▼

Property 1 ▲

+

PropertyType	Address Line 1	Address Line 2	City	State	ZIP	County	Country	Lot
Multi-Unit Dwelling 2-4 Units	2100 Century road		Paradise	OH	70007	Ashland	USA	first

Lender 0 ▼

Buyer/Borrower 1 ▲

Seller 0 ▲

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

Search ASHTEST StewartAccess Test Agency Inc/Jennifer Test agency

Jacket 0 Create New Jacket

	Form Type	Date	Form	Serial Number	Status	Property Line 1	Lender	Buyer	
No items to display									

CPL 1 Create New CPL

	Covered Party	Date	Form	CPL Number	Status	Property Line 1	Lender	Buyer	
Detail	Lender	8/7/2015	CPL Single Transaction	177836600	Issued	5762 Joe St.	Wells Fargo Bank, N.A.	Show Money	
1 - 1 of 1 items									

Charges 0

Premium T...	Premium Sub Type	Description	Serial Number	Actual Premium	Actual Remittance	Fee	Calculated P
No items to display							

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:

stewart access File CPL Jacket Contact TPSTESTER3@dev.picdev.local Log off

File menu dropdown: Product, Detail

Search

File Number

Agency StewartAccess Test Agency

Jacket CPL Charges

Search

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Help

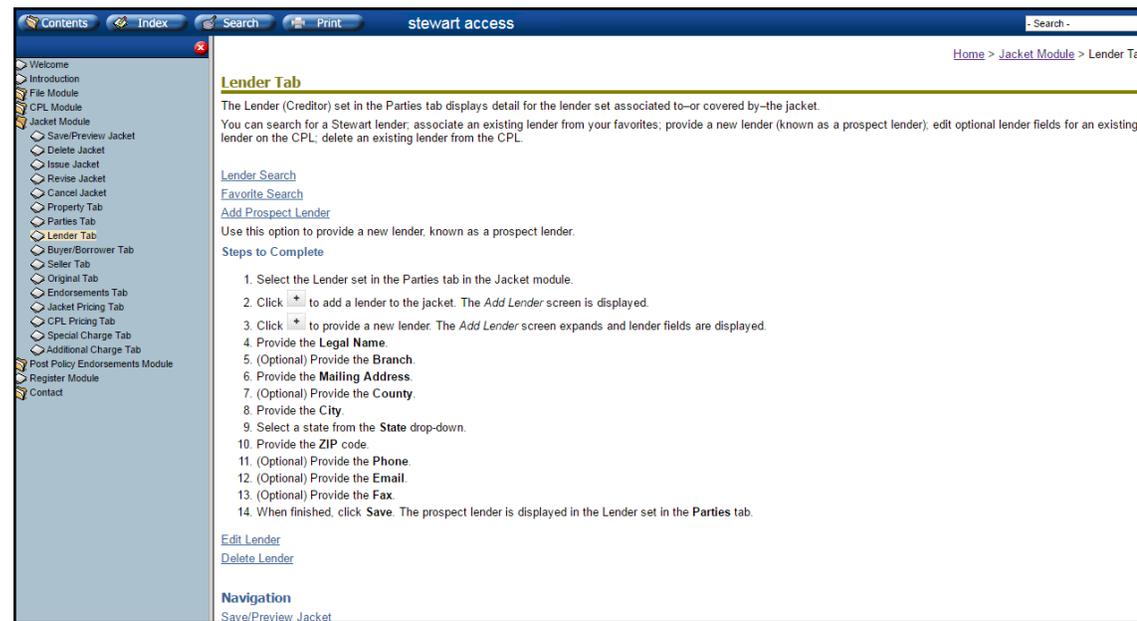
Stewart Access is an intuitive software product that allows you to easily create Policy jackets and report policy information and includes a comprehensive Online Help system. To access Online Help, click **Help** from the main menu.



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.

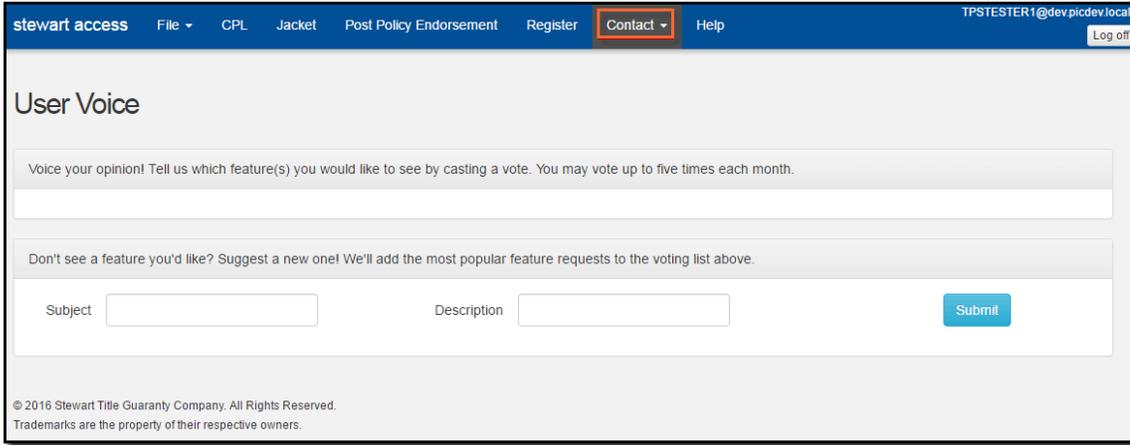


Selecting a topic from **Help** displays additional information and useful step-by-step instructions to walk you through how to complete a task.



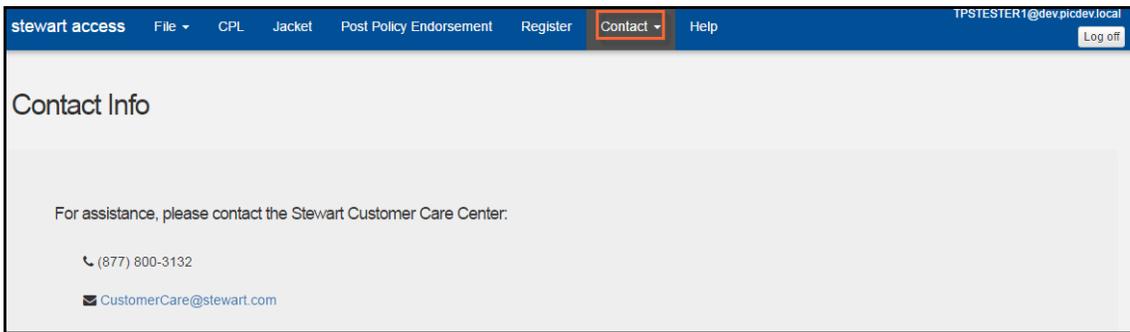
Contact Us

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.



The screenshot shows the Stewart Access web application interface. The top navigation bar includes links for 'stewart access', 'File', 'CPL', 'Jacket', 'Post Policy Endorsement', 'Register', 'Contact', and 'Help'. The 'Contact' menu item is highlighted with a red box. The user is logged in as 'TPSTESTER1@dev.picdev.local' and has a 'Log off' button. The main content area is titled 'User Voice' and contains the following text: 'Voice your opinion! Tell us which feature(s) you would like to see by casting a vote. You may vote up to five times each month.' Below this is a large text input field. Further down, it says: 'Don't see a feature you'd like? Suggest a new one! We'll add the most popular feature requests to the voting list above.' This is followed by a form with two input fields labeled 'Subject' and 'Description', and a blue 'Submit' button. At the bottom left, there is a copyright notice: '© 2016 Stewart Title Guaranty Company. All Rights Reserved. Trademarks are the property of their respective owners.'

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



The screenshot shows the Stewart Access web application interface with the 'Contact' menu item highlighted. The main content area is titled 'Contact Info' and contains the following text: 'For assistance, please contact the Stewart Customer Care Center:'. Below this, there are two contact options: a phone icon followed by '(877) 800-3132' and an email icon followed by 'CustomerCare@stewart.com'.