



E-Closing and Stewart Title Guaranty Company
Integration Users Manual

Stewart CPL and Jacket Integration setup

The following is a step by step tutorial on implementing and using the CPL and Jacket Integration between Stewart and E-Closing.

Setting up the integration

1. From the Whiteboard go to Back Office – E-Closing Connect. If you do not see the E-Closing Connect screen you will need to go to manage users and give yourself full access to this screen. Click on the image of Stewart’s logo and enter your Stewart username, password and Agent ID.

The screenshot shows the Stewart logo on the left. To its right is a text box with the message: "Through eClosing's integration with Stewart Access™, you can quickly and easily process Closing Protection Letters (CPL) from directly within eClosing, allowing you to save time and increase productivity." Below this is a link: "For more information go to stewart.com." The login form includes fields for "Username" (containing "eclosinguser1@dev.picd"), "Password" (masked with dots), "State List" (a dropdown menu with "Validate" and a list of states: AK,AL,AR,AZ,CA,CO,CT,DC,DE,FL,GA,HI), and "Agent ID" (containing "1-174A2H"). A PDF icon is visible in the top right corner.

2. Once you have added these credentials you need to update the E-Closing Connect screen. The integration is now complete and available from the Title Policy screen.

Using the CPL integration

1. The CPL integration is accessed from the Title Policy screen. On the Title Policy screen you will notice a link labeled “Save Draft CPL”. When you click on the link you may be prompted for some additional CPL information. After completing the required CPL Fields you can click Generate CPL and your CPL will download. Your CPL will also be saved in the scanned/saved documents area of the File Summary.


The screenshot displays the Stewart Title Policy screen. At the top, the "Underwriter" is set to "Stewart". Below this are fields for "Commitment Effective Date" (03/01/2019), "Time" (PM), and "Number". The screen is divided into "Loan" and "Owner" sections. The "Loan" section includes fields for "Policy number*" (tbd), "Policy Rate Type" (Standard), "Jacket type", "Total Coverage" (500,000.00), "Reissue Rate Coverage" (.00), "Premium (Alta Settlement Sheet)", "Premium (Closing Disclosure)", "Substitution Loan Rate" (N/A), "Policy Exceptions" (1, 2, 3), and "Premium Overage" (.00). The "Owner" section includes fields for "Policy number*" (tbd), "Policy Rate Type" (Standard), "Total Coverage" (750,000.00), "Reissue Rate Coverage" (.00), "Premium (Alta Settlement Sheet)", "Premium (Closing Disclosure)", "Substitution Loan Rate" (N/A), "Policy Exceptions" (1, 2, 3), and "Premium Overage" (.00). At the bottom, there are radio buttons for "Who is Paying?" (Buyer or Seller) and a note: "* Enter 'TBD' in the loan and/or Owner policy number fields to calculate premiums". A "Calculate Premium (E-Closing)" button is located at the bottom left. A yellow box highlights the "Save Draft CPL" and "Generate Jacket(s)" buttons in the bottom right corner. The Stewart logo and "Stewart Links" (Stewart ICL, Stewart STEPS, Stewart Access) are also visible.

- After completing the required CPL Fields you can click Generate CPL and your CPL will download. Your CPL will also be saved in the scanned/saved documents area of the File Summary.

Underwriter	Stewart		
Commitment Effective Date	03/01/2019	Time	PM
		Number	

Loan		Owner	
Policy number*	TBD	Policy number*	TBD
Policy Rate Type	Standard	Policy Rate Type	Standard
Jacket type	ALTA Loan Policy - FL - 6-17-2006	Jacket type	ALTA Owners Policy - FL - 6-17-2006
Total Coverage	500,000.00	Total Coverage	750,000.00
Reissue Rate Coverage	.00	Reissue Rate Coverage	.00
Premium (Alta Settlement Sheet)	.00	Premium (Alta Settlement Sheet)	.00
Premium (Closing Disclosure)	.00	Premium (Closing Disclosure)	.00
Substitution Loan Rate	N/A	Substitution Loan Rate	N/A
Policy Exceptions	1, 2, 3	Policy Exceptions	1, 2, 3
Premium Overage	.00	Premium Overage	.00
Who is Paying?	<input checked="" type="radio"/> Buyer <input type="radio"/> Seller	Who is Paying?	<input type="radio"/> Buyer <input checked="" type="radio"/> Seller

* Enter 'TBD' in the loan and/or Owner policy number fields to calculate premiums



Stewart Links:

- [Stewart ICL](#)
- [Stewart STEPS](#)
- [Stewart Access](#)

Save Draft CPL

Delete Draft CPL

Generate CPL

Generate Jacket(s)

Calculate Premium (E-Closing)


Using the Jacket Integration

- The Jacket integration is accessed from the Title Policy screen. On the Title Policy screen you will notice a link labeled "Generate Jackets". Before clicking on this link you will want to confirm that the appropriate Jacket Types have been selected above. The Jacket Types are not tied to the Policy Rate types which are used to calculate premiums and are downloaded directly from Stewart.

Underwriter	Stewart		
Commitment Effective Date	03/01/2019	Time	PM
		Number	

Loan		Owner	
Policy number*	TBD	Policy number*	TBD
Policy Rate Type	Standard	Policy Rate Type	Standard
Jacket type	ALTA Loan Policy - FL - 6-17-2006	Jacket type	ALTA Owners Policy - FL - 6-17-2006
Total Coverage	500,000.00	Total Coverage	750,000.00
Reissue Rate Coverage	.00	Reissue Rate Coverage	.00
Premium (Alta Settlement Sheet)	.00	Premium (Alta Settlement Sheet)	.00
Premium (Closing Disclosure)	.00	Premium (Closing Disclosure)	.00
Substitution Loan Rate	N/A	Substitution Loan Rate	N/A
Policy Exceptions	1, 2, 3	Policy Exceptions	1, 2, 3
Premium Overage	.00	Premium Overage	.00
Who is Paying?	<input checked="" type="radio"/> Buyer <input type="radio"/> Seller	Who is Paying?	<input type="radio"/> Buyer <input checked="" type="radio"/> Seller

* Enter 'TBD' in the loan and/or Owner policy number fields to calculate premiums



Stewart Links:

- [Stewart ICL](#)
- [Stewart STEPS](#)
- [Stewart Access](#)

Save Draft CPL

Generate Jacket(s)

Calculate Premium (E-Closing)

4. When you click on the Generate Jackets link , a popup window will appear asking for policy information. Type in the appropriate information and click on Generate Jacket.

Stewart Jacket Fields

Location:

Property Type:

Loan Policy

Transaction Code:

Jacket Date:

Product Option Special Charges Additional Charges None

Owner Policy


Transaction Code:

Jacket Date:

Product Option Special Charges Additional Charges None

If all of your information is accepted by Stewart, your jacket will appear on the screen in pdf format, and will be saved to the scanned/saved documents area of the File Summary.

5. If, however, the information was not accepted, a message will appear asking you to complete the request within the Stewart website. Click on the link for Stewart Access and look for the highlighted field, which can then be edited. For a Simultaneous Loan, both the Loan Jacket and the Owners jacket will need to be edited.



Loan Jacket request must be completed at:

Owners Jacket request must be completed at:

[Click to return to previous page](#)

After completion, simply click on the "Click to return to previous page" and you will return to the Title Policy page and see your Policy Number has been recorded. Your Jacket(s) will also be saved in the scanned/saved documents area of the File Summary.