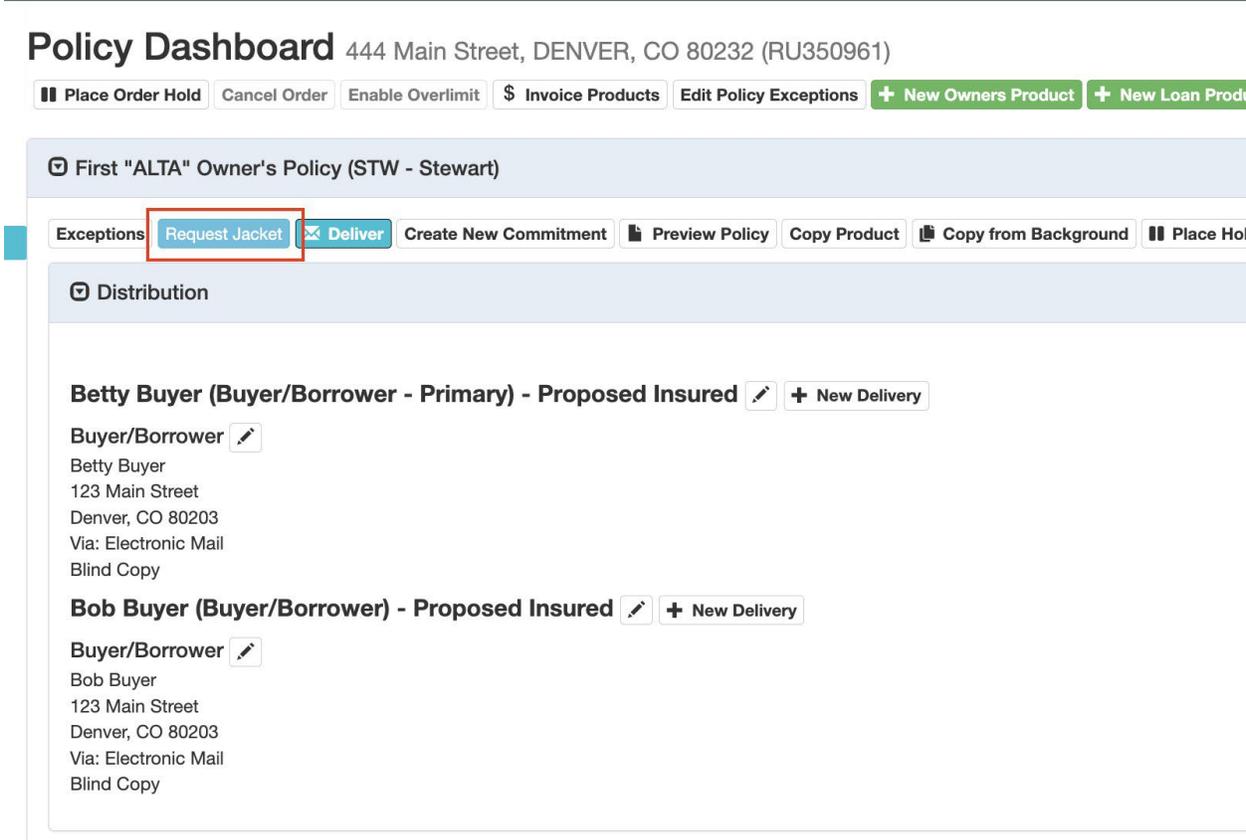


Settlor/Stewart Jacket Quick Reference Card

Request a Policy Jacket

Before a policy jacket can be requested, *Title Setup* (if enabled) and a commitment must first be completed.

In the order number dropdown, select *Title Policies* and scroll to the applicable policy. Select *Request Jacket*.



The screenshot shows a 'Policy Dashboard' for '444 Main Street, DENVER, CO 80232 (RU350961)'. At the top, there are several action buttons: 'Place Order Hold', 'Cancel Order', 'Enable Overlimit', '\$ Invoice Products', 'Edit Policy Exceptions', '+ New Owners Product', and '+ New Loan Product'. Below this is a section for 'First "ALTA" Owner's Policy (STW - Stewart)'. A row of buttons includes 'Exceptions', 'Request Jacket' (highlighted with a red box), 'Deliver', 'Create New Commitment', 'Preview Policy', 'Copy Product', 'Copy from Background', and 'Place Hold'. Underneath is a 'Distribution' section with two entries: 'Betty Buyer (Buyer/Borrower - Primary) - Proposed Insured' and 'Bob Buyer (Buyer/Borrower) - Proposed Insured'. Each entry has a 'New Delivery' button and a list of details including name, address, and contact information.

Note: A *Policy Date* must be entered in the Schedule A section of the product in order to request a policy jacket. When complete, click *Submit* to request the policy jacket.

If the policy jacket is successfully created, the Stewart policy number will display in the header of the policy. Select *Preview Policy* to review the jacket and the appended policy from the Settlor system.

Settlor/Stewart Jacket Quick Reference Card

Policy Dashboard 444 Main Street, DENVER, CO 80232 (RU350961)

Place Order Hold **Cancel Order** **Enable Overlimit** **Invoice Products** **Edit Policy Exceptions** **+ New Owners Product** **+ New Loan Product**

First "ALTA" Owner's Policy O-9301-005256438 (STW - Stewart)

Exceptions **Cancel Jacket** **Deliver** **Create New Commitment** **Preview Policy** **Copy Product** **Copy from Background** **Place Hold**

Distribution

Betty Buyer (Buyer/Borrower - Primary) - Proposed Insured **+ New Delivery**

Buyer/Borrower
Betty Buyer
123 Main Street
Denver, CO 80203
Via: Electronic Mail
Blind Copy

Bob Buyer (Buyer/Borrower) - Proposed Insured **+ New Delivery**

Buyer/Borrower
Bob Buyer
123 Main Street
Denver, CO 80203
Via: Electronic Mail
Blind Copy

Settlor/Stewart Jacket Quick Reference Card

Void a Policy Jacket

In the *Title Policies* page, select *Cancel Jacket*.

Policy Dashboard 444 Main Street, DENVER, CO 80232 (RU350961)

Place Order Hold | Cancel Order | Enable Overlimit | Invoice Products | Edit Policy Exceptions | New Owners Product | New Loan Product

First "ALTA" Owner's Policy O-9301-005256438 (STW - Stewart)

Exceptions | **Cancel Jacket** | Deliver | Create New Commitment | Preview Policy | Copy Product | Copy from Background | Place Hold

Distribution

Betty Buyer (Buyer/Borrower - Primary) - Proposed Insured + New Delivery

Buyer/Borrower
Betty Buyer
123 Main Street
Denver, CO 80203
Via: Electronic Mail
Blind Copy

Bob Buyer (Buyer/Borrower) - Proposed Insured + New Delivery

Buyer/Borrower
Bob Buyer
123 Main Street
Denver, CO 80203
Via: Electronic Mail
Blind Copy

In the *Cancel Policy Jacket* form, select a *Cancel Reason*. When complete, click *Submit*.

Cancel Policy Jacket

Are you sure you wish to cancel the following policy?

Product: "ALTA" Owner's Policy

Insured: Betty Buyer AND Bob Buyer

Coverage: \$100,000.00

Our Policy Number: O-9301-005256438

Underwriter Policy Number: O-9301-005256438

Cancel Reason

Entered in Error

Close Submit

Once a policy jacket for a product is canceled, a new one can be created.

Note: Settlor does not currently support revisions.