

Stewart Access: Retrieving Policy Data from Closing

You can create **Policies** and **Endorsements** using the **Retrieve** icon in the **Policy** screen. Clicking **Retrieve** automatically populates **Policy** and **Endorsement** data based on the information entered in **Title Charges** and **Closing**.

Steps

1. Select the **Policy Form** to be issued.

Total Premium \$1.	744.00			Jum	ρ
Line Number 1108	Rate Based On Simultaneou	is Lender's 💌			
Line 1109 - Lender's Policy Line	1110 - Owner's Policy				
I4 4 1 of 1	⊧н 👆 🗙				
Line Number Under	writer	Agent	Policy Coverage 1	ype	
1109-1 Stews	art Title Guaranty Company	▼× 000000	× Basic Policy	•	
Loan Amount \$150,000.00	Form Name	• × [Policy		
Liability Amount \$150,000.00	Additional Liability \$0.00	Endoisement Liability \$0.00	Total Liability Yea \$150,000.00	rs 0	
Show Prior Policy Discount Cale	culation	`			
Disclosure Premium \$1,019.00	Disclosure Buyer Amount \$1,019.00	Disclosure Seller Amount \$0.00	E Show Disclosure Premium on Settlement Statements		
Premium eso on	Premium Buyer Amount	Premium Seller Amount	Risk Rate		
Endorsement Premium	Endorsement Buyer Amount	Endorsement Seller Amount	Endorsement Risk Rate	Endorsements	
Total Disclosure Premium \$1,019.00	Total Disclosure Buyer Amou \$1,019.00	nt Total Disclosure Seller Amo \$0.00	unt Enter a Title Insuran	ce Premium Adjustment on	
	Total Description Disease Associate	Total Description College Amount	line 238 in Section L	. Adjustments and on line	

- 2. With the file open, click **Policies** under **Data Entry Groups**.
- 3. Click the **Retrieve** button.
- 4. A message requiring confirmation appears. Click **Yes**. The policy related data entered in **Title Charges/Closing** displays including all policies and endorsements entered in the **Closing Module**.

Policies						
P E 🖬 🗛 🔍 🗙						
Total File Premium:	Not Transmitted Policy	: 0-9301 DRAFT				
\$1,744.00	\$1,744.00 Underwriter *			Transa	ction Type *	Total Premium
Policies	STGC Stewart Title G	iuaranty Company 👘 🔻	000000 000000	• N 1	Vew 🔻	\$1,694.00
	Form Name *		Policy *	Serial Number *		
*E-9319	06 TN Owners Policy	▼ ×	O-9301	•		
C-9328	Policy Date *	Issue Date	Property *		Count	y / State
	▼ ×		Property 1		▼ × David	son / TN
	Lender		Agency Location *			
		-		ReFi Reissue		
	Liability *	Gross Premium *	Risk Rate	UW Remittance	Add'l.Liability	Reissue Liability
	▼ \$300,000	.00 \$1,694.00	\$887.50	\$338.80	\$0.00	\$0.00

- 5. Review the data on the Policy screen. You can add or edit information in the fields as required.
- 6. When finished, click **Save**. The policy is saved, and the policy number displays on the left side of the screen. Once you create the policy, the corresponding policy document set is automatically added to the order in the **Documents** section.

Note: Retrieve cannot be used to create Policies when there is at least one saved or incomplete policy record on the order. You cannot use Retrieve to flow endorsements from Title Charges or Closing without a parent policy.