

Upgrade Process Checklist for ASMs/ASRs and Agents

Stewart Access

- As an ASM/ASR or Agent, you are now responsible for initiating and guiding yourself through the Stewart Access Upgrade.
- This checklist will help guide you through the steps to be taken for a smooth transition. Please check each item as they are completed.

| ASM/ASR | Agent | Step |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | What's changing in Stewart Access? The Guide was developed to prepare ASMs/ASRs and Agents for the Stewart Access Upgrade (reference page 3-5 of the guide). |
| <input type="checkbox"/> | <input type="checkbox"/> | <ul style="list-style-type: none"> • Automatic Transmittal |
| <input type="checkbox"/> | <input type="checkbox"/> | <ul style="list-style-type: none"> • Remitting Payment |
| <input type="checkbox"/> | <input type="checkbox"/> | <ul style="list-style-type: none"> • Submitting Images and Schedules |
| <input type="checkbox"/> | <input type="checkbox"/> | <ul style="list-style-type: none"> • Endorsements |
| <input type="checkbox"/> | <input type="checkbox"/> | <ul style="list-style-type: none"> • Policy Serial Numbers |
| <input type="checkbox"/> | <input type="checkbox"/> | <ul style="list-style-type: none"> • Transaction Codes |
| <input type="checkbox"/> | <input type="checkbox"/> | <ul style="list-style-type: none"> • Commitments |
| <input type="checkbox"/> | <input type="checkbox"/> | What are the requirements for the Stewart Access Upgrade? |
| <input type="checkbox"/> | <input type="checkbox"/> | <ul style="list-style-type: none"> • For the requirements of your TPS, reference pages 6-9 of the guide to determine additional steps. |
| <input type="checkbox"/> | <input type="checkbox"/> | <ul style="list-style-type: none"> • Ensure all the requirements are in place before the go-live date. |
| <input type="checkbox"/> | <input type="checkbox"/> | What are the steps to follow for the Stewart Access Upgrade? |
| <input type="checkbox"/> | <input type="checkbox"/> | <ul style="list-style-type: none"> • To submit a request, click here to begin the upgrade process. <ul style="list-style-type: none"> - This will generate an upgrade process ticket automatically - Do Not Submit a separate <i>Data Collection Form (DCF)</i> when requesting the upgrade - Request a list of current users by emailing stewartaccessdeploymentteam@stewart.com |
| <input type="checkbox"/> | <input type="checkbox"/> | <ul style="list-style-type: none"> • Submitting the Request for Upgrade triggers the following Communications listed below a-f: |
| <input type="checkbox"/> | <input type="checkbox"/> | a. Confirmation of Receipt of Upgrade Ticket (no action needed) |
| <input type="checkbox"/> | <input type="checkbox"/> | b. Communication of Upgrade Go-Live Date (action needed) <ul style="list-style-type: none"> - Determine if any requirements are needed for your TPS - An Agent Quick Reference Card (QRC) is included with this email. |
| <input type="checkbox"/> | <input type="checkbox"/> | c. Communication of User Credential Follow up (action needed) <ul style="list-style-type: none"> - Users need to be created before the Go Live Date |
| <input type="checkbox"/> | <input type="checkbox"/> | d. Go Live (action needed) <ul style="list-style-type: none"> - Start Policy clean up/reconciliation |
| <input type="checkbox"/> | <input type="checkbox"/> | e. Follow up email (action needed) <ul style="list-style-type: none"> - Feedback Survey attached - Continue Policy clean up/reconciliation. Complete by Final Inventory Shutoff Day. |
| <input type="checkbox"/> | <input type="checkbox"/> | f. Final Inventory Shutoff Reminder (action needed) <ul style="list-style-type: none"> - Complete Final Legacy Transmittal |
| <input type="checkbox"/> | <input type="checkbox"/> | To ensure you are ready by your Go-Live Date, please: |
| <input type="checkbox"/> | <input type="checkbox"/> | <ul style="list-style-type: none"> • Ensure all users have read through the training materials for their specific TPS (reference page 6 and 9 of the guide). Keep a copy of <i>the TPS User Guide</i>, QRC and/or Videos handy. |
| <input type="checkbox"/> | <input type="checkbox"/> | <ul style="list-style-type: none"> • All users have their Stewart Access credentials. Log in via TPS or Portal to test credentials prior to the Go-Live date. (This does NOT apply to AIM+ users). |
| <input type="checkbox"/> | <input type="checkbox"/> | For additional information reference page 10 of the guide . |