USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5
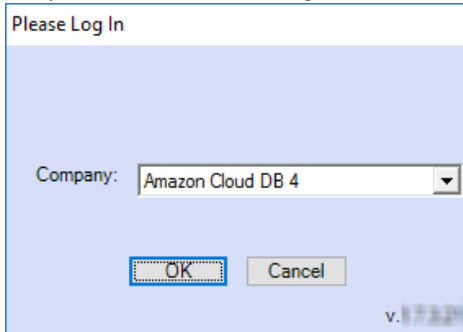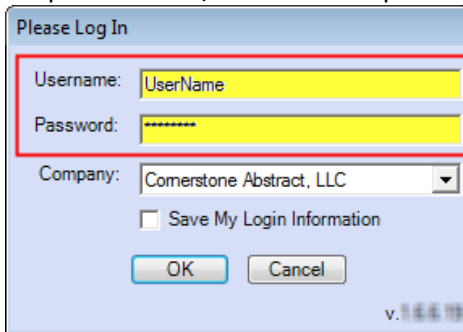
HOW-TO ADD STEWART TITLE GUARANTY COMPANY CREDENTIALS IN SNAPCLOSE

STEP 1:

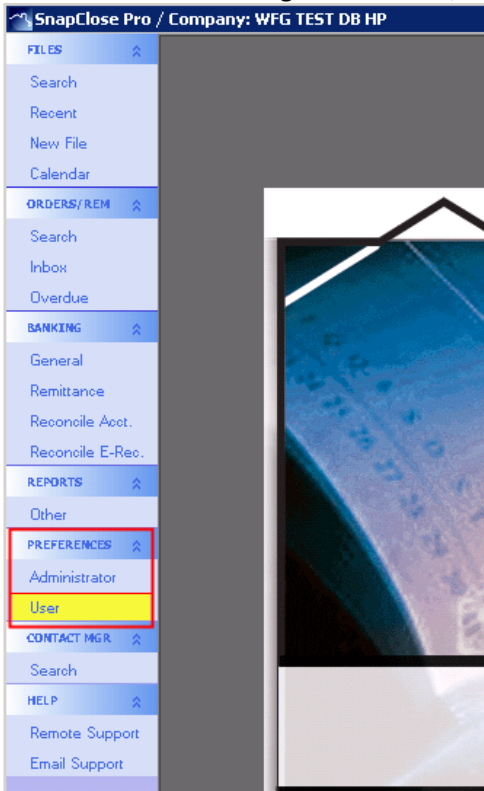SnapClose Cloud users log into the Cloud using you log in credentials and click [*OK*]

SnapClose Client/Server users open the program and sign in with your SnapClose username & password & click [*OK*]

STEP 2:

Note the left-hand navigation column, under *Preferences* click on the link labeled *User*

(CONTINUED ON NEXT PAGE)

STEP 3:

Note the User section labeled Partner Integration Settings. Click the down arrow and choose Stewart Title Guaranty Company by selecting "*STEWART*" under Partner Integration Settings

STEP 4:

Enter your Stewart Title Guaranty Company [*User Name*] & [*Password*], then click [*Save/Update*]

*Note, repeat steps 1 through 4 for each SnapClose user utilizing integration for Stewart Title Guaranty Company
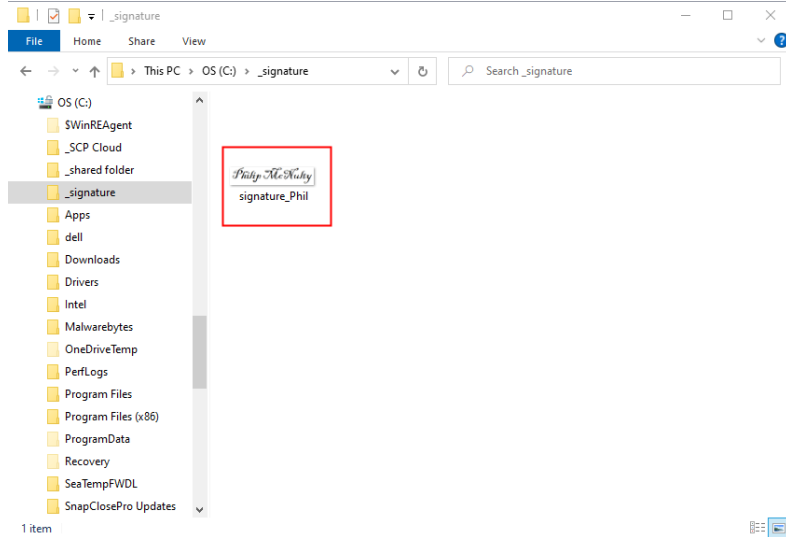
(CONTINUED ON NEXT PAGE)

HOW-TO ADD SIGNATURES STEWART TITLE GUARANTY COMPANY SIGNATURES IN SNAPCLOSE

STEP 1:

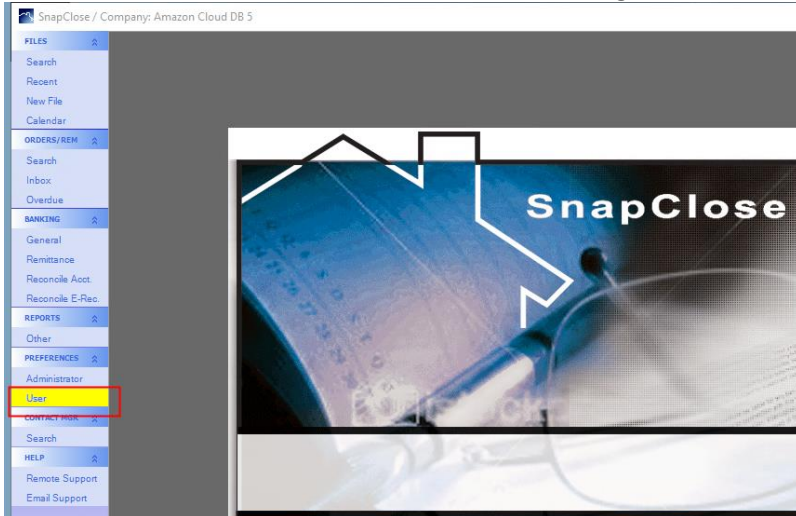Scan your signature and save it to a local folder on your computer.

STEP 2:

Log in to SnapClose as explained in Step 1 of *How-To Add Stewart Title Guaranty Company Credentials In SnapClose*.
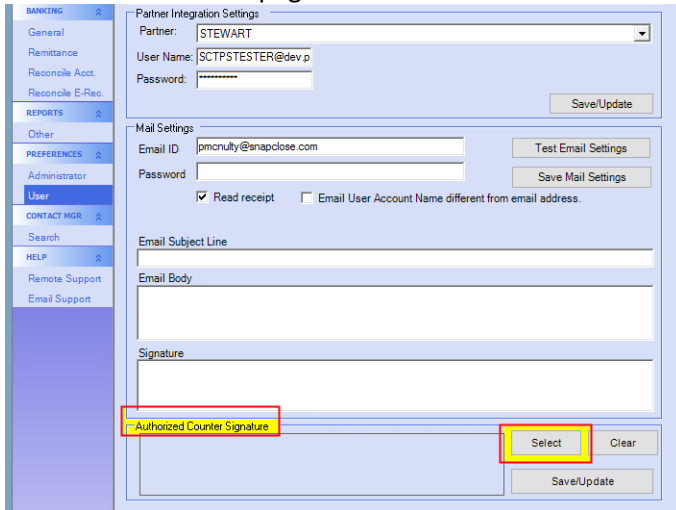
STEP 3:

Click on the User link under the Preferences heading

STEP 4:

At the bottom of the page in the window labeled Authorized Counter Signature, click on [*Select*] button
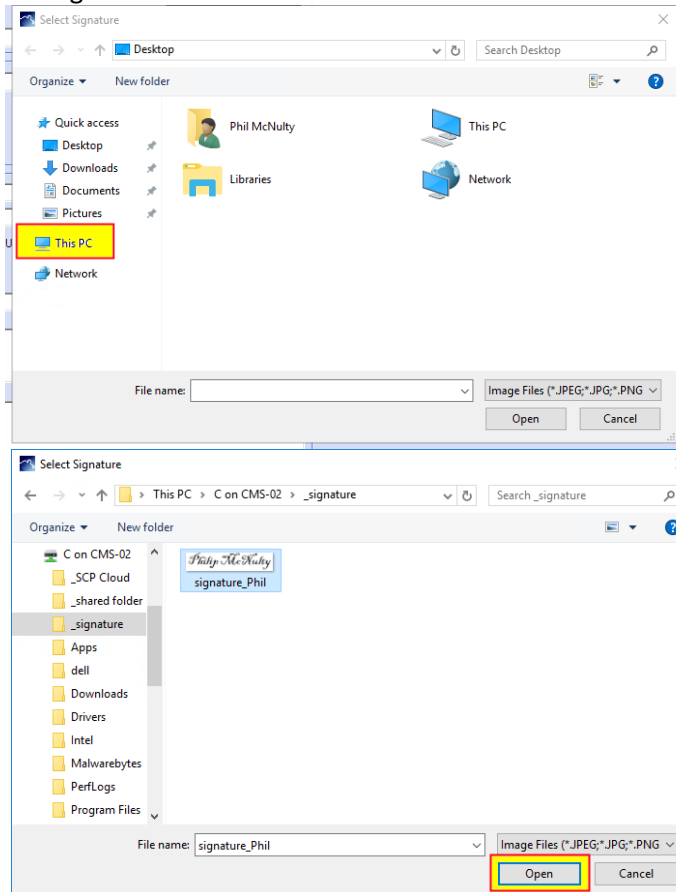

STEP 5:

"Select Signature" window will open and select the folder where the scanned signature was saved & select the file and press open or double-click on the signature file

Client/Server users skip to Step 7

Cloud Users Follow Instruction In Step 6 to open folder

STEP 6:

Select the drive labeled "This PC" that the signature folder is located & select the file and press open or double-click on the signature file

(CONTINUED ON NEXT PAGE)

STEP 7:

Note, the signature in the Authorized Counter Signature box and press [Save/Update] button. You will now be able to enter the signature on the Stewart Title forms.

(CONTINUED ON NEXT PAGE)

HOW-TO ADD STEWART TITLE GUARANTY COMPANY AS AN UNDERWRITER ON A FILE IN SNAPCLOSE

STEP 1:

Open or create a file; making sure to add the file's Profile tab data including:

a) *Lender* party and enter a [Loan Number] to be included on the requested form(s) and

b) *Underwriter* set to [Stewart Title Guaranty Company]

STEP 2:

Enter a [*Closing Date*:] this date is mandatory for generating the **Policy Jacket**.

*Note for CPL, Commitment, Guarantee, and Binder Jackets no closing date is required.

*Note; you may always change the [Closing Date] at any time in SnapClose

(CONTINUED ON NEXT PAGE)

HOW TO CREATE THE STEWART TITLE GUARANTY COMPANY - CPL IN SNAPCLOSE

STEP 1 {GENERATING THE CPL}:

Click on the Commitment tab and click the button labeled [*CPL*] at the bottom right-hand side of the window

STEP 2-a {REQUEST CPL WINDOW APPEARS}:

You will see all the data pulled from the file's Profile tab

However, there are a few items at the top of the window that needs to be selected by choosing the information from the drop-down lists;

a) **Agency**: chose from drop-down list if more than one agency;

b) **Location**: chose from drop-down list if more than one location;

c) **Branch**: chose from drop-down list if more than one branch;

d) **Covered Party**: chose from drop-down list which party (Lender, Buyer/Borrower, etc.) the CPL is going to cover,
note the covered parties are determined for the State of the property on the file;

e) **Form:** drop-down arrow lists the CPL types available for the State of the property on the file

f) If there is no additional Party and Lender Information including the Successor Language is correct;
Click on [**Order CPL**] button

Additional Steps are continued below

STEP 2-b [continued]:

Additional information may be needed:

a) Lender Information: edit Lender information changes, as necessary

b) Use the Lender Successor Language dropdown list to choose or change the Successor Language, as necessary

b) ***Secondary Agency, Approved Attorney, Settlement Company, or None (default selection)***: chose by selecting the appropriate radio button as to which applies to the CPL being ordered;
to review how these options work refer to Step 3 below

STEP 2-c [continued]:

Static Information from the file:

a) ***Loan #***: pulled from the Lender party on the Profile tab, any changes necessary – go to the Profile tab, edit the Lender Loan #;

b) ***Loan Amount***: pulled from the Lender party on the Profile tab, any changes necessary – go to the Profile tab, edit the Lender Principal Amount;

c) ***Buyer/Borrower***: the names of the Parties as entered on the Profile tab, any changes necessary – go to the Profile tab and edit the parties

d) ***Seller/Owner***: the names of the Parties as entered on the Profile tab, any changes necessary – go to the Profile tab and edit the parties

SECONDARY AGENCY, APPROVED ATTORNEY, SETTLEMENT COMPANY, OR NONE (DEFAULT SELECTION)

STEP 3A- {selecting the radio button option of "None"}:
Order the CPL by clicking on [Order CPL]

"*Order CPL*" window comes up to confirm the Request has been processed, Click [*OK*]

The CPL document is saved and can be opened in the Docs tab.
The CPL document can also be opened right from the "***Request CPL***" window by clicking on [*View CPL*]
Click [*Close*] to exit

STEP 3B- {selecting the radio button option of "Secondary Agency"}:

Secondary Agency window pops up;

a) Click on [Search] for the Secondary Agency or

b) Chose from the Favorites from the dropdown list

c) Order the CPL by clicking on [Order CPL]

STEP 3C- {selecting the radio button option of "Approved Attorney"}:

Approved Attorney window pops up;

a) Click on [Search] for the Approved Attorney or

b) Chose from the Favorites from the dropdown list

c) Order the CPL by clicking on [Order CPL]

(CONTINUED ON NEXT PAGE)

STEP 3D- {selecting the radio button option of "Settlement Company"}:

Settlement Company window pops up;
a) Click on [Search] for the Settlement Company or
b) Chose from the Favorites from the dropdown list
c) Order the CPL by clicking on [Order CPL]

STEP 3E:

a) "Order CPL" window comes up to confirm the Request has been processed
b) The CPL document is saved and can be opened in the Docs tab.
c) The CPL document can also be opened right from the "Request CPL" window by clicking on [View CPL]
d) Click [Close] to exit

STEP 4:

[*Void CPL*] button

If you need to make any changes to the CPL, e.g. Borrower name(s), Lender, loan number, or even the property address, you need to make the change on the Profile tab first and then open the [*CPL*], then click on [*Void CPL*];

Void CPL window will open where a Reason radio button must be selected; click on [*Void CPL*] to complete the process

"*Void CPL*" window come up to confirm the Request has been processed, Click [*OK*]

Then follow steps 2 through 3 to generate a new CPL with the updated information

HOW TO CREATE THE STEWART TITLE GUARANTY COMPANY – COMMITMENT JACKET IN SNAPCLOSE

STEP 1 {GENERATING THE COMMITMENT JACKET}:

Click on the Commitment tab and click the button labeled [*Commitment*] at the bottom right-hand side of the window
A Commitment Date must be entered to generate the Commitment Jacket

STEP 2 {REQUEST COMMITMENT JACKET WINDOW APPEARS}:

Note; the signature that was entered in SnapClose, *see pages 3-5 for instructions*

a)   Select the Agency from the dropdown list
b)   Select the Location from the dropdown list
c)   Select the Letter Type from the dropdown list
d)   If the signature was entered in SnapClose, it will automatically be entered
e)   If for any reason, you do not what the signature on the Commitment Jacket, you can press [Clear Signature]
f)   In the case where the signature was cleared, the signature can be added back by pressing [Add Signature]
g)   Press [Order Commitment Jacket] button to order and generate the document

(CONTINUED ON NEXT PAGE)

STEP 3 {GENERATED COMMITMENT JACKET WINDOW}:

"*Order Commitment Jacket*" window comes up to confirm the Request has been processed, Click [*OK*]

Order Commitment Jacket ✕

ⓘ Request has been processed successfully

OK
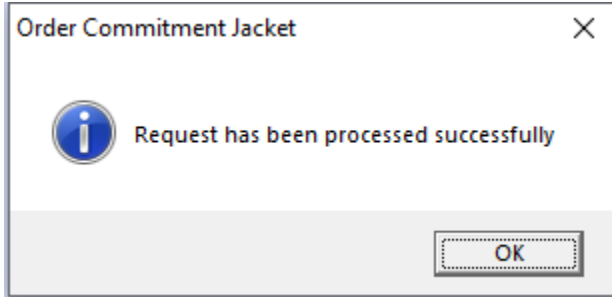
a) The Commitment Jacket document is saved and can be opened in the Docs tab.
b) The Commitment Jacket document can also be opened right from the "Request Commitment Jacket " window or by clicking on [View Commitment Jacket]
c) Click [Close] to exit

Commitment Jacket ✕

Agency:	StewartAccess Test Agency	▾
Location:	StewartAccess Test Agency - 1980 Post Oak Suite 800	▾
Letter Type:	ALTA Commitment 8-1-2016	▾

Policy Number: C-0000-579548852

Void Reasons
- ⦿ Cancelled Due to Revision
- ○ Jacket Not Issued
- ○ Entered in Error
- ○ Transaction Cancelled
- ○ Jacket Data or Type Changed
- ○ Other

[Void Commitment Jacket]   Submit Date 5/7/2021   [View Commitment Jacket]
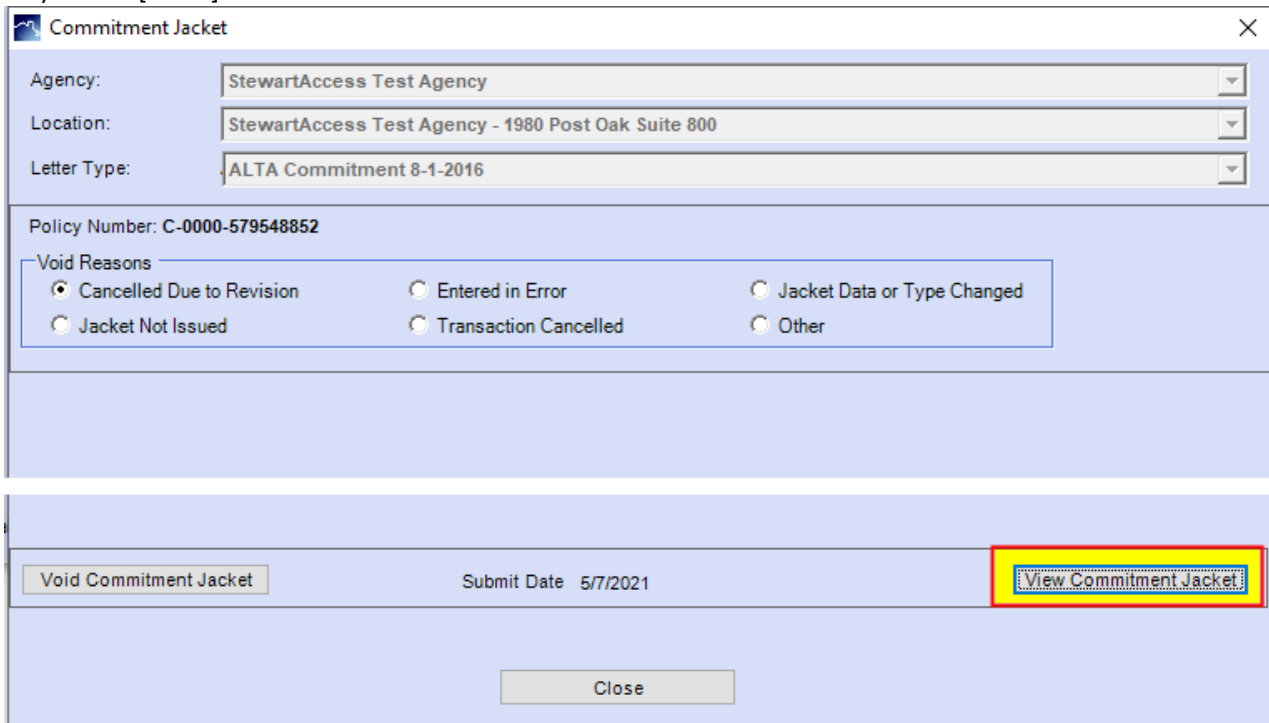
[Close]

STEP 4:

  [*Void Commitment Jacket*] button
    a) If you need to make any changes to the Commitment Jacket, and after you make the change(s) in the file
    b) then open the [Commitment Jacket], click one of the "Void Reasons" radio button that would apply to the void
    c) then click on [Void Commitment Jacket];

"*Void* Commitment Jacket " window come up to confirm the Request has been processed, Click [*OK*]

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HOW TO CREATE THE STEWART TITLE GUARANTY COMPANY – GUARANTEE JACKET IN SNAPCLOSE

STEP 1 {GENERATING THE GUARANTEE JACKET}:

Click on the Guarantee tab and click the button labeled [*Guarantee*] at the bottom right-hand side of the window
A Commitment Date must be entered to generate the Guarantee Jacket

STEP 2 {REQUEST GUARANTEE JACKET WINDOW APPEARS}:

Note; the signature that was entered in SnapClose, *see pages 3-5 for instructions*

 a) Select the Agency from the dropdown list
 b) Select the Location from the dropdown list
 c) Select the Letter Type from the dropdown list
 d) Guarantee Jackets are State specific and each state may have additional information requested
 e) Note any label in red font color are mandatory fields and must have a value entered
 g) If the signature was entered in SnapClose, it will automatically be entered
 h) If for any reason, you do not what the signature on the Guarantee Jacket, you can press [Clear Signature]
 i) In the case where the signature was cleared, the signature can be added back by pressing [Add Signature]
 j) Press [Order Guarantee Jacket] button to order and generate the document

(CONTINUED ON NEXT PAGE)

STEP 3 {GENERATED GUARANTEE JACKET WINDOW}:
"*Order Guarantee Jacket*" window comes up to confirm the Request has been processed, Click [*OK*]

Order Guarantee Jacket   ✕

(i) Request has been processed successfully

OK
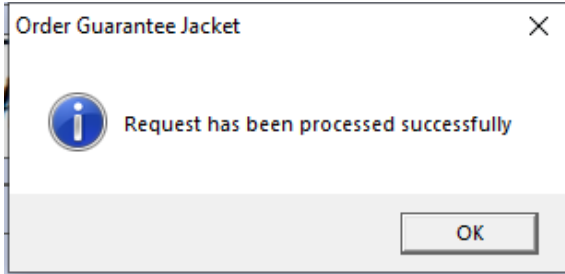
a) The Guarantee Jacket document is saved and can be opened in the Docs tab.
b) The Guarantee Jacket document can also be opened right from the "Request Guarantee Jacket " window or by clicking on [View Guarantee Jacket]
c) Click [Close] to exit

Guarantee Jacket   ✕

Agency:	StewartAccess Test Agency
Location:	StewartAccess Test Agency Inc - 1980 Post Oak Suite 800
Letter Type:	Ohio Final Judicial Report (Rev. 10/15/2004)

| Liability: | $200,000.00 | Actual Premium: | $1,000.00 | Actual Remittance: | $100.00 |

Case Number:

Court Name:

Search Date: 05/07/2021

Policy Number: G-0000-579572910

Void Reasons
◉ Cancelled Due to Revision   ◯ Entered in Error   ◯ Jacket Data or Type Changed
◯ Jacket Not Issued   ◯ Transaction Cancelled   ◯ Other

Void Guarantee Jacket   Submit Date 5/7/2021   View Guarantee Jacket

Close

(CONTINUED ON NEXT PAGE)

STEP 4:

[*Void Guarantee Jacket*] button

    a)   If you need to make any changes to the Guarantee Jacket, and after you make the change(s) in the file

    b)   then open the [Guarantee Jacket], click on one of the "Void Reasons" radio button that would apply to the void

    c)   then click on [Void Guarantee Jacket];

"*Void* Guarantee Jacket " window come up to confirm the Request has been processed, Click [*OK*]

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HOW TO CREATE THE STEWART TITLE GUARANTY COMPANY – BINDER JACKET IN SNAPCLOSE

STEP 1 {GENERATING THE BINDER JACKET}:
Click on the Binder tab and click the button labeled [_Binder_] at the bottom right-hand side of the window
A Commitment Date must be entered to generate the Binder Jacket

STEP 2 {REQUEST BINDER JACKET WINDOW APPEARS}:
Note; the signature that was entered in SnapClose, _see pages 3-5 for instructions_

   a)   Select the Agency from the dropdown list
   b)   Select the Location from the dropdown list
   c)   Select the Letter Type from the dropdown list
   d)   Binder Jackets are State specific and each state may have additional information requested
   e)   Note any label in red font color are mandatory fields and must have a value entered
   g)   If the signature was entered in SnapClose, it will automatically be entered
   h)   If for any reason, you do not what the signature on the Binder Jacket, you can press [Clear Signature]
   i)   In the case where the signature was cleared, the signature can be added back by pressing [Add Signature]
   j)   Press [Order Binder Jacket] button to order and generate the document

(CONTINUED ON NEXT PAGE)

STEP 3 {GENERATED BINDER JACKET WINDOW}:

"*Order Binder Jacket*" window comes up to confirm the Request has been processed, Click [*OK*]

Order Binder Jacket ✕

ℹ️ Request has been processed successfully

OK
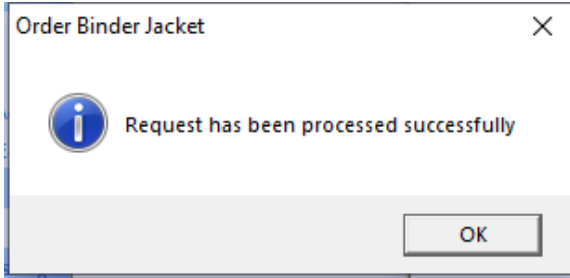
a) The Binder Jacket document is saved and can be opened in the Docs tab.
b) The Binder Jacket document can also be opened right from the "Request Binder Jacket " window or by clicking on [View Binder Jacket]
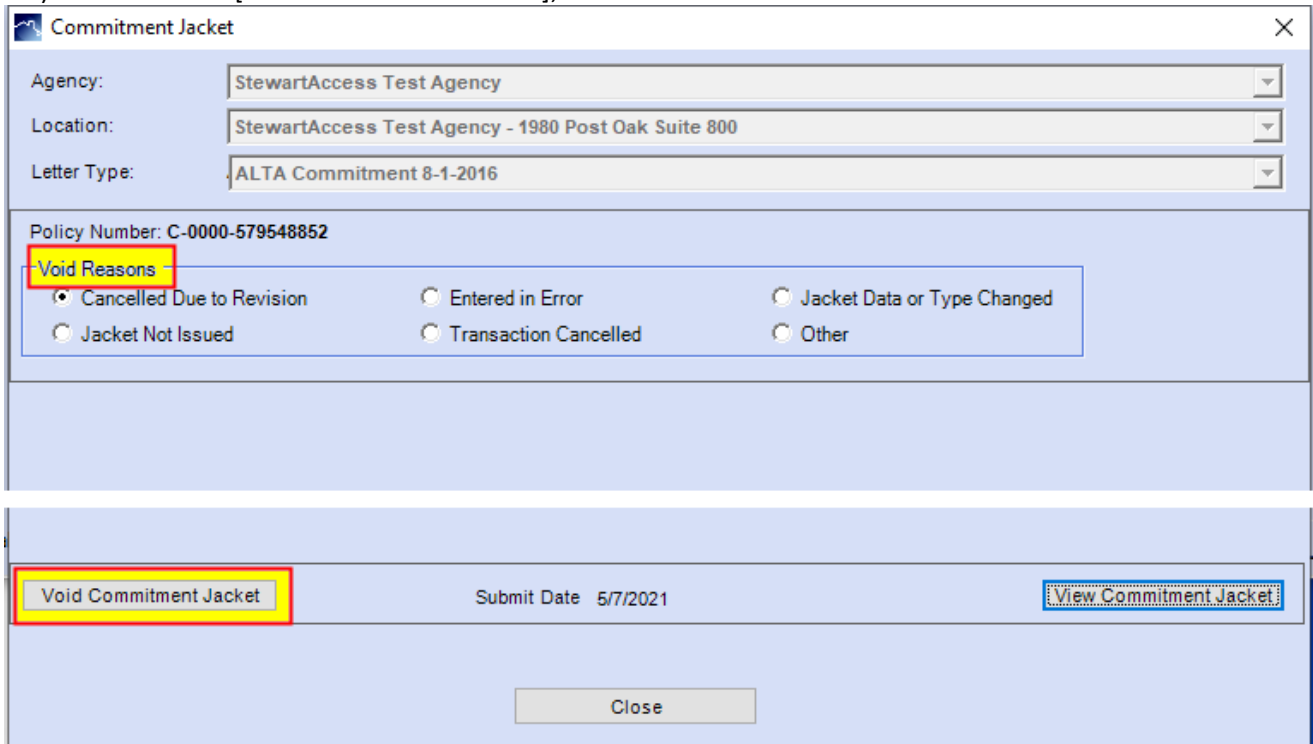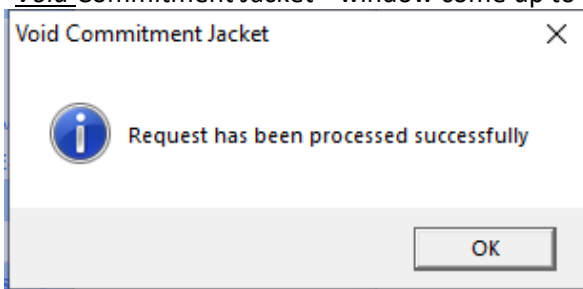c) Click [Close] to exit

Binder Jacket ✕

Agency:	StewartAccess Test Agency
Location:	StewartAccess Test Agency - 1980 Post Oak Suite 800
Letter Type:	CLTA Interim Binder 11-4-16

Liability:	$333,000.00	Actual Premium:	$1,000.00	Actual Remittance:	$100.00

Interim Binder To:

Interim Binder Type of Policy:

Interim Binder Number of Days:

Interim Binder Endorsements to Issue:

Policy Number: **B-0000-579573071**

Void Reasons
- ⦿ Cancelled Due to Revision
- ○ Entered in Error
- ○ Jacket Data or Type Changed
- ○ Jacket Not Issued
- ○ Transaction Cancelled
- ○ Other

Void Binder Jacket	Submit Date 5/7/2021	View Binder Jacket

Close

STEP 4:

[*Void Binder Jacket*] button
   a) If you need to make any changes to the Binder Jacket, and after you make the change(s) in the file
   b) then open the [Binder Jacket], click on one of the "Void Reasons" radio button that would apply to the void
   c) then click on [Void Binder Jacket];

"*Void* Binder Jacket " window come up to confirm the Request has been processed, Click [*OK*]

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HOW TO CREATE THE STEWART TITLE GUARANTY COMPANY – POLICY JACKET IN SNAPCLOSE

Generating Policy Jackets require a Closing Date to be entered on the Profile Tab

STEP 1 {GENERATING THE POLICY JACKET}:

Click on the Policy tab;
a) the "Policy Jacket" window will open; select the [*Agency*:] & [*Location*:] from the drop-down lists, if necessary
b) click on [*OK*] to continue

c) "Owner Policy" section is at the top
d) "Loan Policy" is the section below (Note; if multiple Lenders on the file they will also be entered)
e) The Policy window will show the [Policy #] which will automatically populate with the Policy Jacket number issued on the ordered Jacket
f) Insured parties are shown on the window also

(CONTINUED ON NEXT PAGE)

NEW FEATURE ADDED FOR ORDERING POLICY JACKETS SIMULTANEOUSLY INCLUDING POLICY JACKET REVISIONS

ADDED SIMULTANEOUS WINDOW AT THE BOTTOM OF THE POLICY TAB
a) Ability to order All Policy Jackets Simultaneously by selecting the policy jackets description from the dropdown list
b) Revise Policy Jackets
c) Void Policy Jackets

HOW TO CREATE THE STEWART TITLE GUARANTY COMPANY – OWNER'S POLICY JACKET IN SNAPCLOSE

STEP 1:

a) In the Owner Policy section, click on the drop-down arrow in the field labeled [Policy Jacket Type] and choose the Owner's Policy Jacket for which is applicable to the file.

b) *Note, the list of owner's policy jackets are populated by Stewart Title Guaranty Company and may be different from the below list depending on the property's "*State.*"

STEP 2:

a) Optional entry of Recorded Date for entering the policy jacket date. Recorded Date is the default and the user has the ability to choose either the Closing Date or leave the Recording Date. If the Recording Date is not entered, then the Policy Date will default to the Closing Date.

a) After selecting the appropriate Owner's "Policy Jacket Type", Click on [Order Jacket] button

b) *Note, after choosing the Owner's & Loan Policy jackets from the dropdown lists, the following windows will show when ordering the Policy Jackets from the *New Simultaneous Window At The Bottom Of The Policy Tab*

STEP 3:

The "Request Policy Jacket" window will appear, there are multiple data fields on this window to be completed. (*Note, mandatory fields are noted as red labels. The rest of the fields are requested but not mandatory.)

"**Request Policy Jacket**" window shows the Owner's Policy fields to be completed:

a) [*Policy Amount*:] – mandatory field will be populated with the Purchase Price of the file

b) [*Actual Premium*:] – mandatory field will be populated automatically*

   *Note; the Actual Premium is calculated on the Invoice tab and the premium amount is entered in this field. The Actual Premium field can be edited, if necessary.

3) [*Actual Remittance*:] – mandatory field will be populated automatically*

   *Note; the remittance is calculated and the remittance amount is entered in this field. The Actual Remittance field can be edited, if necessary.

4) [*Effective Date*:] – mandatory field will be defaulted with the Recorded Date and if not the Closing Date is populated and can be changed by clicking on the Recorded Date dropdown.

   *Note if necessary; the Effective Date can me changed manually or click on the [Effective Date:] calendar drop-down to chose the date

OWNER POLICY REQUEST POLICY JACKET WINDOW

(CONTINUED ON NEXT PAGE)

STEP 4:

Next section is state dependent and may have more information requested, e.g. Texas has a selection for policy Transaction Code where Florida and New Jersey do not.

a) [*Transaction Code*:] – mandatory field to be populated by the user from the dropdown list

b) [*None, Special Charges*, Additional Charges**] – radio button selection to be selected when applicable
   *Note; when Special Charges or Additional Charges is selected, additional OP section will open at the bottom of the window and use the scroll bar down to view
   1) [Actual Premium:] – mandatory field that is populated by the agent
   2) [Actual Remittance:] – mandatory field that is populated by the agent
   3) [Transaction Code:] – mandatory field that is populated by selecting from the dropdown list

c) [Simultaneous] – checkbox will be populated automatically when the file's transaction is set to Purchase*
   *Note; this checkbox may be unchecked as necessary

d) [*Refinance/Reissue*] – checkbox will be populated automatically when the file's transaction is set to Refinance and in the case of the Owner's Policy the Reissue (*Original Policy*) information may apply but not mandatory
   1) [Policy #] – Original Policy Number entered; not a mandatory field
   2) [Liability] – Original Policy Liability entered; not a mandatory field
   3) [Effective Date] – Original Policy Effective Date entered; not a mandatory field
   4) [Underwriter] – mandatory field, underwriter is selected from the dropdown list
   5) [Form Type] – mandatory field, form type is selected from the dropdown list

e) Signature will be set as entered in the User section (**see pages 3-5 in this manual to add the signature*)

STEP 5 - ENDORSEMENTS:
a) [Endorsements] – All Owner's Policy endorsements included in SnapClose will automatically be listed
b) Endorsements that are entered on the Invoice Tab as Line Item Charges will automatically be checked and enter the Endorsement Premium and Remittance amounts
c) Agent may scroll the list of endorsements and manually check the appropriate Endorsement and manually enter the Endorsement Premium and Remittance

Endorsements	Premium	Remittance
☑ ALTA 16-06 Mezzanine Financing	$680.00	$102.00
☑ ALTA 3.1-06 Zoning (Owner's)	$453.20	$67.98
☐ ALTA 7-06 Manufactured Housing Unit (Owner's)	$0.00	$0.00
☐ NJ Arbitration Endorsement	$0.00	$0.00

STEP 6 – ORDER POLICY JACKET:
a) Press [Order Policy Jacket] button
b) In the event that STG cannot match the SnapClose endorsement; an Additional Information box will appear to have the agent select the answer(s) to match the SnapClose endorsement to STG endorsement

Endorsements	Premium	Remittance
☑ T-26 - Additional Insured	$294.00	$88.20
☑ T-3 - Completion of Improvements		

Additional information is needed for this order. Please answer the following questions:

T-26 Additional Insured   0893–Additional Insured Endorsement

T-3 Assignment of Lien

0893–Additional Insured Endorsement
0890–Access Endorsement
0501–Amendment of Survey Exception for T-1R
0500–Amendment of Survey Exception for T-1
0010–Charge for Additional Chains of Title
0896–Co-Insurance
0550–Completion of Improvements and Survey
0806–Contiguity Endorsement

Actual Premium: $1,000.00	Actual Remittance: $30.00	Transaction Code: (8042) Commitment Issued to F.D.I.C. and O.T.S.Commitment to
Actual Premium:	Actual Remittance:	Transaction Code: Select Transaction Code
Actual Premium:	Actual Remittance:	Transaction Code: Select Transaction Code

Order Policy Jacket   Close

c) After selecting the correct response, press [Order Policy Jacket] button

d) Policy Jacket confirmation window will pop up and press OK to complete

Policy Jacket ✕

Request has been processed successfully

OK
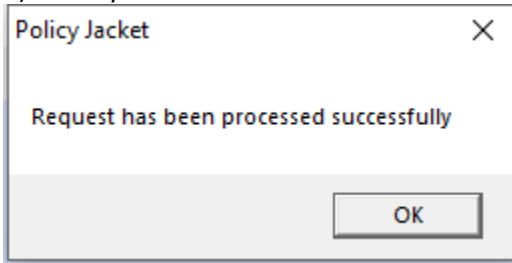
STEP 7 – COMPLETED ORDER POLICY JACKET:

When the Owner's Policy Jacket has been generated, the following options are available

Owner Policy:

Amount	$515,000.00		
Policy #	O-0000-5797707	Deed From	
Effective Date	▼	Issued To	
Document Date	▼		
Recorded Date	05/07/2021 ▼	Book	Page	Instrument #
Policy Jacket Type	NJRB 1-15 Owners Policy 9-10-2007 ▼	Submit Date	5/8/2021 3:17:00
	Void Jacket	View Document	Revise Jacket

a) Owner's Policy # is populated automatically and be disabled
b) Policy Jacket Type selected will populate and be disabled
c) Submit Date and Time will populate and be disabled
d) [Void Jacket] – press this to Void the policy and reset to order a new policy jacket
   Note, the Void Policy Jacket – Void Reasons will show to have the reason be selected, then press [Void Policy Jacket] button to complete
e) [View Jacket] – press to open the Policy Jacket document
   Note, the Policy Jacket document is also saved to the Docs tab
f) [Revise Jacket] – press to revised the existing jacket information

Revise Policy Jacket ✕

Owner

Policy Jacket Type: **NJRB 1-15 Owners Policy 9-10-2007**   Policy # O-0000-579770748

Policy Amount: $515,000.00   Actual Premium: $2,266.00   Effective Date: 05/07/2021 ▼
                               Actual Remittance: $339.90

Previously Ordered / Revise Jacket Details: ☑ Simultaneous
                                                               ☐ Refinance/Reissue
Policy Amount: $515,000.00   Effective Date: 5/7/2021

Actual Premium: $2,266.00

Actual Remittance: $339.90

Endorsement Effective Date:	Endorsements	Premium	Remittance
05/07/2021 ▼	☑ ALTA 16-06 Mezzanine Financing	$680.00	$102.00
	☑ ALTA 3.1-06 Zoning (Owner's)	$453.20	$67.98
	☐ ALTA 7-06 Manufactured Housing Unit (Owner's)	$0.00	$0.00
	☐ NJ Arbitration Endorsement	$0.00	$0.00
	☐ NJ Creditor's Rights Exclusion (Owner's)	$0.00	$0.00
	☐ NJ Fairway (LLC) Endorsement	$0.00	$0.00

Revise Policy Jacket   Close

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HOW TO CREATE THE STEWART TITLE GUARANTY COMPANY – LOAN POLICY JACKET IN SNAPCLOSE

STEP 1:
   a) In the Loan Policy section, click on the drop-down arrow in the field labeled [Policy Jacket Type] and choose the Loan's Policy Jacket for which is applicable to the file.
   b) *Note, the list of Loan policy jackets are populated by Stewart Title Guaranty Company and may be different from the below list depending on the property's "*State*."

STEP 2:
   a) Optional entry of Recorded Date for entering the policy jacket date. Recorded Date is the default and the user has the ability to choose either the Closing Date or leave the Recording Date. If the Recording Date is not entered, then the Policy Date will default to the Closing Date.
   a) After selecting the appropriate Loan "Policy Jacket Type", Click on [Order Jacket] button
   b) *Note, after choosing the Owner's & Loan Policy jackets from the dropdown lists, the following windows will show when ordering the Policy Jackets from the *New Simultaneous Window At The Bottom Of The Policy Tab*

(CONTINUED ON NEXT PAGE)

STEP 3:

The "Request Policy Jacket" window will appear, there are multiple data fields on this window to be completed. (*Note, mandatory fields are noted as red labels. The rest of the fields are requested but not mandatory.)

"**Request Policy Jacket**" window shows the Loan's Policy fields to be completed:

a) [*Policy Amount*:] – mandatory field will be populated with the Loan Liability Amount of the file

b) [*Actual Premium*:] – mandatory field will be populated automatically*

*Note; the Actual Premium is calculated on the Invoice tab and the premium amount is entered in this field. The Actual Premium field can be edited, if necessary.

3) [*Actual Remittance*:] – mandatory field will be populated automatically*

*Note; the remittance is calculated and the remittance amount is entered in this field. The Actual Remittance field can be edited, if necessary.

4) [*Effective Date*:] – mandatory field will be defaulted with the Recorded Date and if not the Closing Date is populated and can be changed by clicking on the Recorded Date dropdown.

*Note if necessary; the Effective Date can me changed manually or click on the [Effective Date:] calendar drop-down to chose the date

LOAN POLICY REQUEST POLICY JACKET WINDOW

STEP 4:

Next section is state dependent and may have more information requested, e.g. Texas has a selection for policy Transaction Code where Florida and New Jersey do not.

a) [*Transaction Code*:] – mandatory field to be populated by the user from the dropdown list

b) [*None, Special Charges*, Additional Charges**] – radio button selection to be selected when applicable

*Note; when Special Charges or Additional Charges is selected, additional LP section will open at the bottom of the window and use the scroll bar down to view

1) [Actual Premium:] – mandatory field that is populated by the agent
2) [Actual Remittance:] – mandatory field that is populated by the agent
3) [Transaction Code:] – mandatory field that is populated by selecting from the dropdown list

c) [Simultaneous] – checkbox will be populated automatically when the file's transaction is set to Purchase*
   *Note; this checkbox may be unchecked as necessary

d) [*Refinance/Reissue*] – checkbox will be populated automatically when the file's transaction is set to Refinance and in the case of the Loan Policy the Reissue (*Original Policy*) information may apply but not mandatory

1) [Policy #] – Original Policy Number entered; not a mandatory field
2) [Liability] – Original Policy Liability entered; not a mandatory field
3) [Effective Date] – Original Policy Effective Date entered; not a mandatory field
4) [Underwriter] – mandatory field, underwriter is selected from the dropdown list
5) [Form Type] – mandatory field, form type is selected from the dropdown list

e) Lender Successor Language Clause will be entered on the Profile tab but may be chosen from the "Select Successor Language" dropdown list or may be manually entered

f) Signature will be set as entered in the User section (**see pages 3-5 in this manual to add the signature*)

STEP 5 - ENDORSEMENTS:

a) [Endorsements] – All Loan Policy endorsements included in SnapClose will automatically be listed

b) Endorsements that are entered on the Invoice Tab as Line Item Charges will automatically be checked and enter the Endorsement Premium and Remittance amounts

c) Agent may scroll the list of endorsements and manually check the appropriate Endorsement and manually enter the Endorsement Premium and Remittance

Endorsements	Premium	Remittance
☑ T-17 - Planned Unit Development	$25.00	$7.50
☑ T-31 - Manufactured Housing	$20.00	$6.00

STEP 6 – ORDER POLICY JACKET:

a) Press [Order Policy Jacket] button

b) In the event that STG cannot match the SnapClose endorsement; an Additional Information box will appear to have the agent select the answer(s) to match the SnapClose endorsement to STG endorsement

Endorsements	Premium	Remittance
☑ T-17 - Planned Unit Development	$25.00	$7.50
☑ T-31 - Manufactured Housing	$20.00	$6.00

Additional information is needed for this order. Please answer the following questions:

T-17 Planned Unit Development   0884-Planned Unit Development Endorsement

T-31 Manufactured Housing   015

0884-Planned Unit Development Endorsement
0887-Planned Unit Development Endorsement issued on two or more policies issued simultaneous o
0890-Access Endorsement
0893-Additional Insured Endorsement
0500-Amendment of Survey Exception for T-1
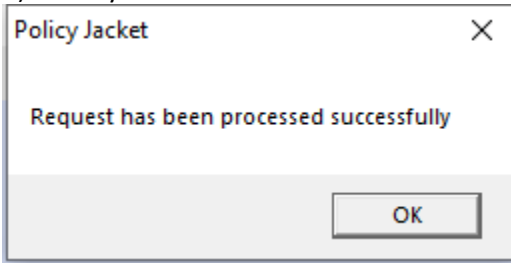0700-Amendment of Tax Exception
700-Amendment of Tax Exception

c) After selecting the correct response, press [Order Policy Jacket] button

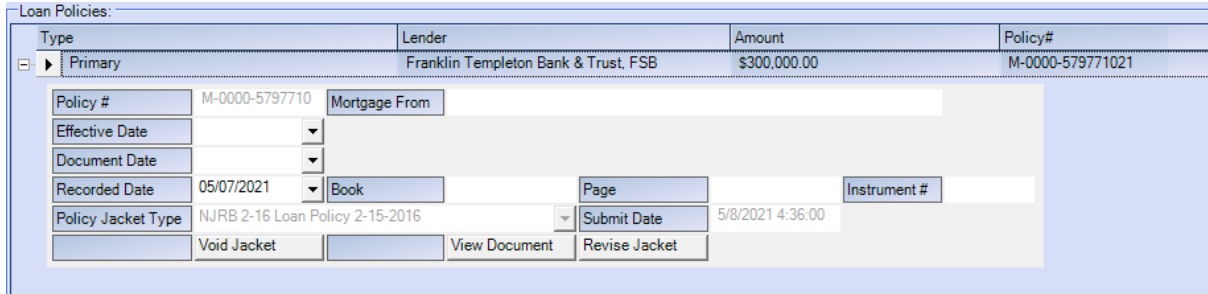d) Policy Jacket confirmation window will pop up and press OK to complete

Policy Jacket ✕

Request has been processed successfully

OK

STEP 7 – COMPLETED ORDER POLICY JACKET:

When the Loan Policy Jacket has been generated, the following options are available

a) Loan Policy # is populated automatically and be disabled
b) Policy Jacket Type selected will populate and be disabled
c) Submit Date and Time will populate and be disabled
d) [Void Jacket] – press this to Void the policy and reset to order a new policy jacket
    Note, the Void Policy Jacket – Void Reasons will show to have the reason be selected, then press [Void Policy Jacket] button to complete
e) [View Jacket] – press to open the Policy Jacket document
    Note, the Policy Jacket document is also saved to the Docs tab
f) [Revise Jacket] – press to revised the existing jacket information