Stewart Access
User Guide

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Introduction

The Stewart Access integration with SoftPro 360 will allow you to order Stewart products within ProForm. SoftPro 360 will be able to create a Stewart file corresponding to information in your ProForm order and enable you to order Policy Jackets along with CPLs through Stewart. Additionally, you'll be able update a CPL and void either a CPL or Policy Jacket. All of this can be done without having to leave your SoftPro workspace, helping to facilitate a more efficient workflow by reducing or eliminating the duplication of data.

Launching Stewart Access

Access from the 360 Services Menu

From the **360 → Services menu**, double-click **Stewart – Stewart Access** located under the Underwriter Services folder. This will open the Order Linking screen:
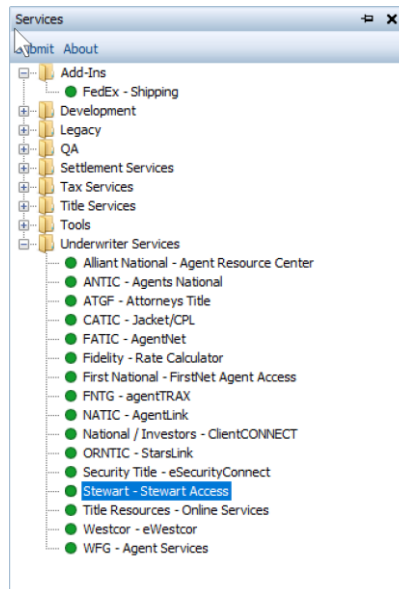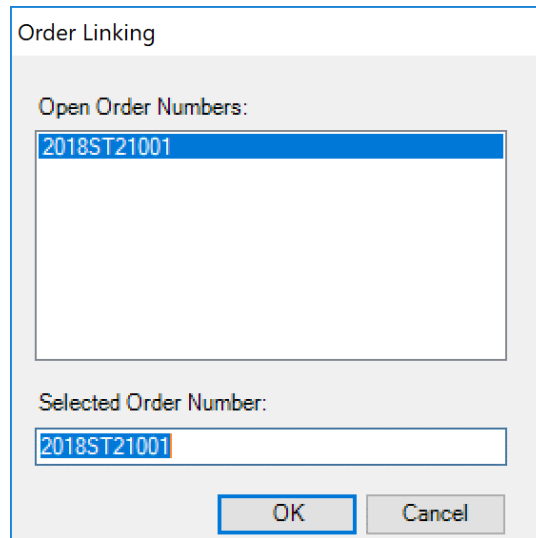
Figure 1 - SoftPro 360 Services Menu

Order Linking

From the **Order Linking** screen, select the ProForm order that will be sent to Stewart:
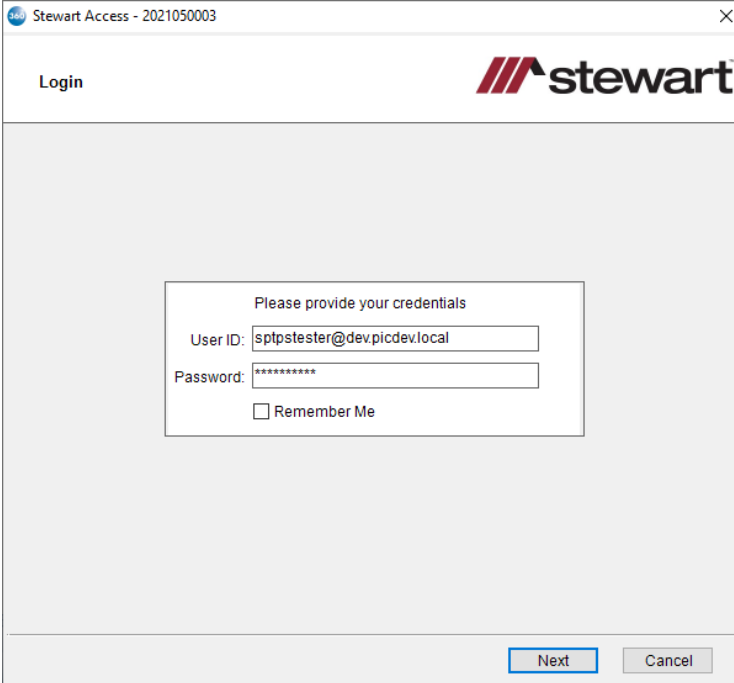
Figure 2 - Order Linking Screen

All orders that are currently opened will be listed in the Open Order Numbers pane. The selected Order Number field will populate with the current active ProForm order. You may select an order from any of the open orders, or you may choose to overwrite the Selected Order Number field with an order that is not currently open. Once you have confirmed an order to link, click **OK** to continue to the Login screen.

Logging In

The **Login** screen requires you to enter a valid **Stewart Access username** and **password**. Check **"Remember Me"** to log in automatically when you launch the product in future sessions. Click **Login** to continue to the Issuing Office screen:

Figure 3 - Login Screen

NOTE: *If you do not have a Stewart Access username and password or are experiencing issues with your given credentials, please contact your Stewart Agency Representative.*

Submitting an Order

Title Insurance Services Screen

From the **Title Insurance Services** screen, you'll be able to:

- View a list of the CPLs and/or Jackets that you've ordered
- Order a CPL or Jacket
- Update an issued product
- Void an issued product
- View order data that you're sending to Stewart with your request
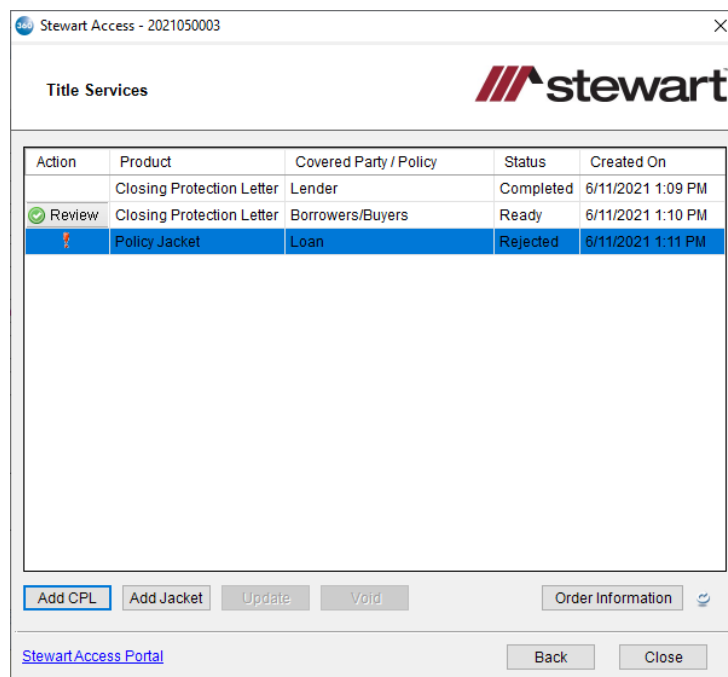
Figure 4 – Title Insurance Services Screen

- A table will display the products you've ordered from Stewart and will provide the following information for each CPL and Jacket:

    Action:

    o   **Review** : 360 has received the CPL or Jacket from Stewart (**Status** = *Ready*) and it is ready for the user to review and accept. Clicking the icon will take you to the **Review** screen where you will be able to view and accept the product.

    o   **Red Question Mark** : The request you submitted to Stewart encountered an error and no product was created. You can hover over the question mark or double-click it to view a description of the error.

Product: The type of product requested from Stewart Access. For CPLs, the value will always be **Closing Protection Letter**. For Jackets, the value will always be **Policy Jacket**.
Covered Party/Policy: The covered party selected for the CPL **(Lender, Buyer, or Seller)** or the type of Policy Jacket selected (**Simultaneous, Owners or Loan**).
Status:
- o   *In Progress*: Your request has been successfully submitted to Stewart.
- o   *Ready*: 360 has received the remitted document from Stewart and is ready for you to view and accept (attach to your order).
- o   *Completed*: The remitted product was accepted and attached to the order.
- o   *Rejected*: An error occurred with the submission of the request.
- o   *Canceled*: The product was voided.
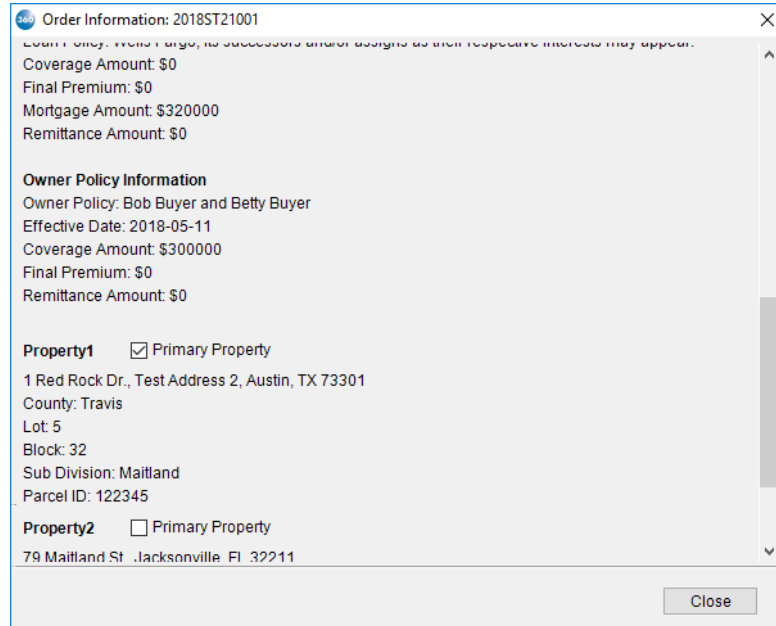
Created On: Date and time stamp of when the product was generated.

- To **sort** the data, click on a column heading. Click once to sort in ascending order and click again to sort in descending order.
- The **Add CPL** or **Add Jacket** button allows you to order a CPL or Jacket, respectively. Either action will navigate to the **Agency** screen.
- To **update** an issued product, highlight a transaction that is in *Completed* status and click the **Update** button.
- To **cancel** an issued product, highlight a transaction that is in *Completed* status and click the **Void** button.
- To view the order data that we are sending to Stewart Access, click the **Order Information** screen.

Order Information Screen

The **Order Information** screen will show a summary of the parties (buyers, sellers and lenders), policy information and property data in your file that will be sent to Stewart. If you have more than one property in your order, then you can specify which one you want to include in your request. By default, the first property listed in your order will be selected.

Figure 5 Order Information Screen

Selecting an Agency

After selecting to add a CPL or add a jacket from the Title Insurance Services screen, you will navigate to the **Agency** screen.

On this screen, you can choose an agency, agency location, and branch for the ProForm order you selected. Selecting an agency name from the first grid will automatically display the corresponding locations and branch in their corresponding grid below it.

After selecting a location, click **Next** to navigate to either the **Closing Protection Letter** screen or the **Policy Jacket – Selection** screen, depending on the action you selected on the Title Insurance Services screen. If there is only one agency with a single location, then you will bypass the Agency screen and navigate directly to the next screen.

Figure 6 – Agency Screen

Adding a CPL

If you have opted to add a CPL, clicking **Next** from the Agency screen will navigate to the Closing Protection Letter screen.

Figure 7 – Closing Protection Letter Screen

- Select the covered party of the CPL you are requesting. If you select Lender, you will be required to select a lender from the drop-down, which includes the lender(s) that are in your order. By default, it will pre-select the first lender listed in your order.
- A list of forms that you will need to select from will display based on the covered party you selected. Select a form from the list.
- The Lender Successor Language will pull from the Proposed Insured field within the linked ProForm Order and display this value if it exists. You will also be able to edit this information. If there is no lender in your order, this field will not be editable.
- The Effective Date will pull from the Commitment Effective Date field within the linked ProForm Order and display if this value exists. You may override and choose a different date to send with your CPL.
- Additional Covered Parties – Options – This section allows you to select multiply Covered Parties
  - Settlement Company
    - Drop down list of approved Settlement Companies from Stewart
    - Add New – This option allows you to add a new Settlement Company
  - Approved Attorney
    - Drop down list of Approved Attorney's from Stewart

- ▪ Add New – This option allows you to add a new Approved Attorney
- ▪ Print Attorney Only – This option will allow you to only print the Attorney on the CPL.
  - o Secondary Agency
    - ▪ Drop down list of approved Secondary Agencies from Stewart
    - ▪ Add New – This option allows you to add a new Secondary Agency
  - o Add/Remove Party from Favorites
    - ▪ Check this box if you would like to add or remove your selected Secondary Agency from your favorites.
- The Edit Covered party link allows you edit the Covered Party you selected above.
  NOTE: If you update information on this screen, it will **not** update in your ProForm Order.

- *Figure 8 – Closing Protection Letter Information Screen*

- Click **Submit** to send your data to Stewart. If there is required information that was not provided or if you've selected an Additional Party, then you will be taken to the Stewart Access site, where you can complete your request and issue the CPL.

Adding a Jacket

If you have opted to add a jacket, you will navigate to the **–Jacket Type** screen from the Agency screen.
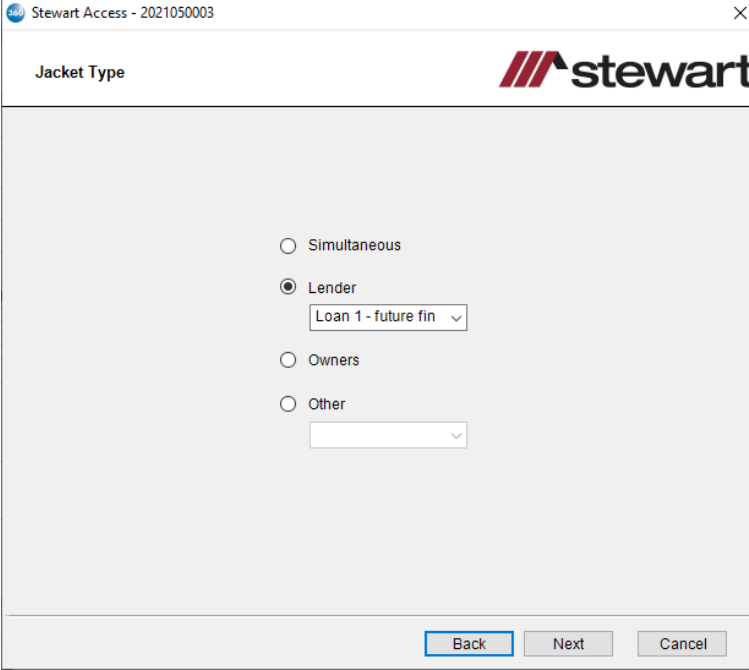

Figure 9 – Jacket Selection Screen

- Select the type of jacket you are requesting. If you select **Simultaneous** or **Lender**, then you are required to select an option from the **Lender** drop-down, which includes the loan policy(s) and the associated lender in your order. If there are multiple loan polices in your order, they will be numbered (e.g., Loan 1, Loan 2, etc.) in the order that it is listed in your ProForm order.
- If you select **Simultaneous**, then you will first be taken to the Policy Jacket – Owners screen, and then upon clicking *Next*, you will navigate to the Policy Jacket – Loan screen before submitting your data to Stewart.
- If you select **Owners**, you will navigate to the **Owner Jacket** screen.
- If you select **Other**, you will be required to choose one of the following options based on the property state, **Binder, Commitment, or Guarantee**.
- Select *Next* to proceed to the select Jacket Screen.

Owners and Loan Policy Jacket Screens

Figure 10 – Owners Jacket Screen

- *Form*
    - Drop down list of forms provided by Stewart
- *Effective Date*
    - The Effective Date will pull from the Commitment Effective Date field within the linked ProForm Order and display if this value exists. You may override and choose a different date to send with your CPL.
- *Liability*
    - The amount will pull from your Proform order and will display it entered. You will also be able to edit this information.
- *Simultaneous*
    - This will default to checked if checked in the Proform order.
- *Reissue/Refinance*
    - This will default to checked if checked in the Proform order.
- *Original Policy*
    - This will default from the information that is entered in the Proform order or allow the user to information directly into the screen.
- *Trans Code*
    - *This will reflect the Trans Code in the Proform order (if there is a match) or provide a dropdown for the user to choose in NM, NY, or TX.*
- *Special Charge and Additional Charge*
    - In specific states, the user may be able to specify a **Special Charge** and/or **Additional Charge** in the request.
    - Property address should be NY for **Additional Charge** or TX for **Special Charge**.

- Click **Submit** to send your data to Stewart. If there is required information that was not provided, or if you've selected one of the Charges, then you will navigate to the Stewart Access site where you can complete your request and issue the jacket from there.
- On the loan screen, if there is additional information that you can add based on the loan form you selected, a *Next* button instead of Submit will display, which will take you to the **Form Details** screen.

Form Details Screen

Figure 8 – Form Details Screen

- Based on the form you selected on the Policy Jacket – Loan screen, there may be additional data that you can provide on the **Form Details** screen. You may also see values already prepopulated with those from your order if it exists.
- If you selected a short form, you will see a *Next* button, which will take you to the **Endorsements** screen. If you did not select a short form, then a *Submit* button will be available instead for you to send your data to Stewart.

Endorsements Screen

Figure 9 – Endorsements Screen

- If you selected a short form from the **Policy Loan – Jacket** screen, **Endorsements** you added to your ProForm Order will display under **Endorsement(s) from your file.**
- If you need to add additional **Endorsements,** you will be able to select one or more endorsements on the **All Short Form Policy Endorsements** screen.
- Clicking **Submit** will send your data to Stewart Access.

Submitting a Request

In the previous integration you would be redirected to the Stewart Access website to complete your request before your product could be issues. That has now been changed within this new integration. Your request will now be submitted to the Stewart Access Portal upon clicking the **Submit** button.

Upon clicking the **Submit** button, the user will then see the Processing screen to indicate that their request is being sent to Stewart:
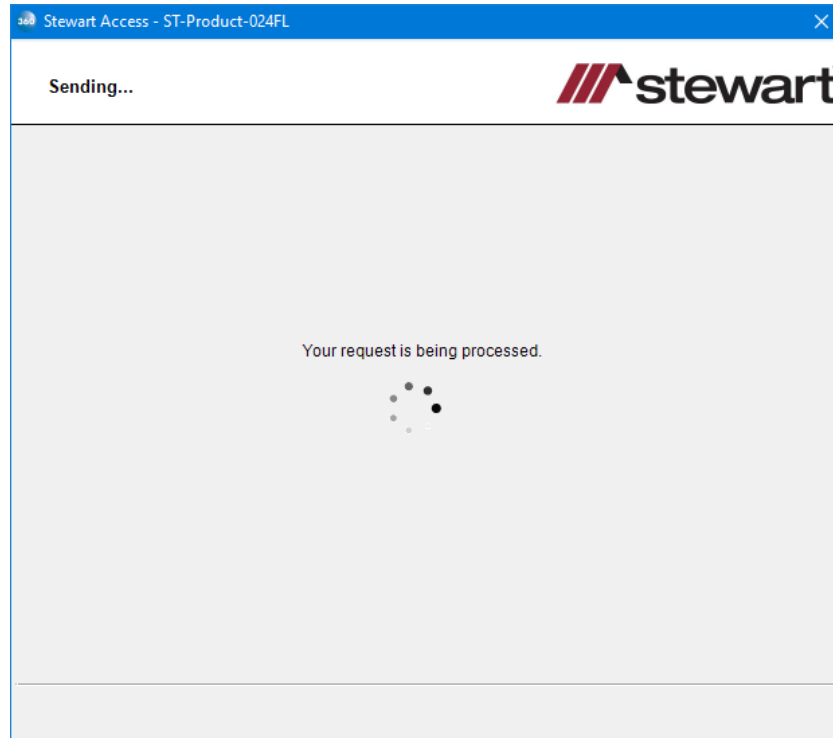

Figure 10 – Sample Stewart Process Screen

Once their product request has been completed by Stewart, they will be brought to the Review Screen:
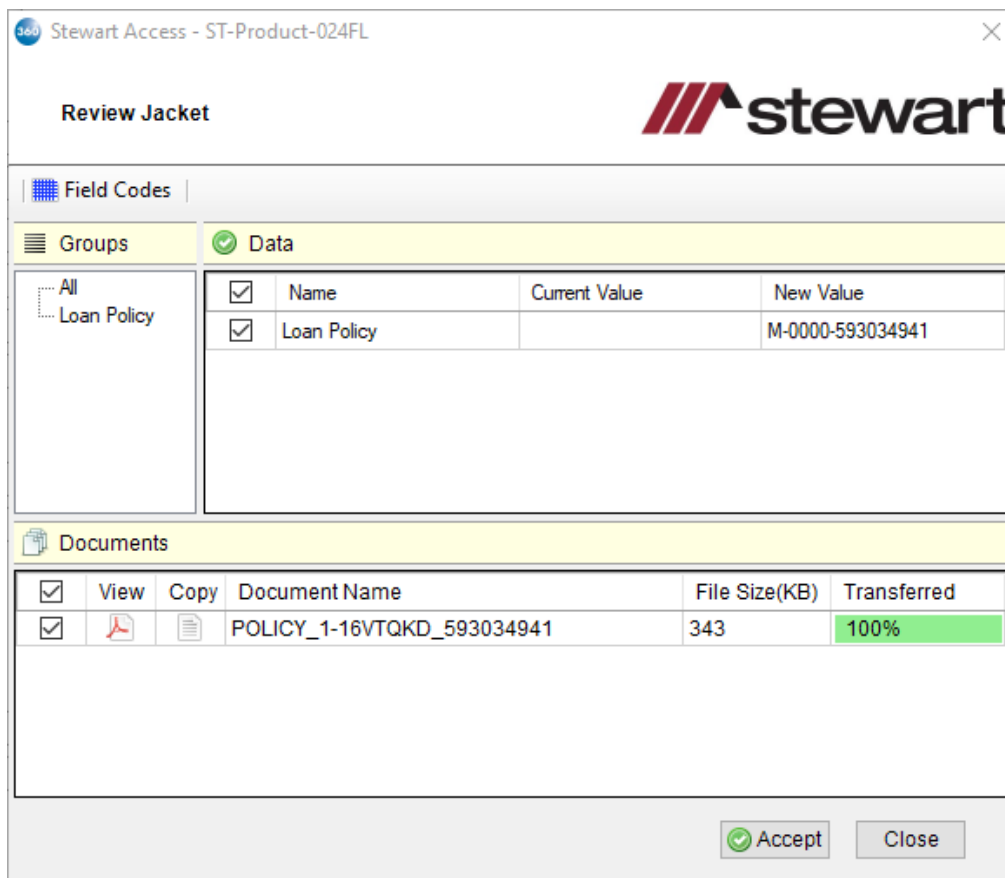

Figure 11 – Review Screen

This will allow the user to do the following actions:
- Obtain the Field Codes for certain fields with the "Field Codes" button
- Under the Documents Label:
  - *View* will allow the user to review a PDF version of the requested product
  - *Copy* will allow the user to copy a version of the document to the user's clipboard

Once the user is ready, the user can click the **Accept** button and will be brought back to the Title Services Screen where their product will show a Completed status. Their completed product will then be pushed automatically to the user's Proform Order Attachment folder.

Updating a CPL or Jacket

NOTE: In the previous integration, the action was referred to as revise. This action was supported only for a CPL and not Jacket revisions. Moving forward, it will now be referred to as Update and 2.5 Integration will support updates for both CPL and Jackets.

You may update a CPL or Jacket that has already been issued in which the product's status is *Completed*.

- On the Title Services screen, highlight a CPL or Jacket from the list of products that you wish to update.
- Click the *Update* button and the user will navigate to the Agency screen where you can begin to follow the same workflow of screens to request a new CPL or Jacket
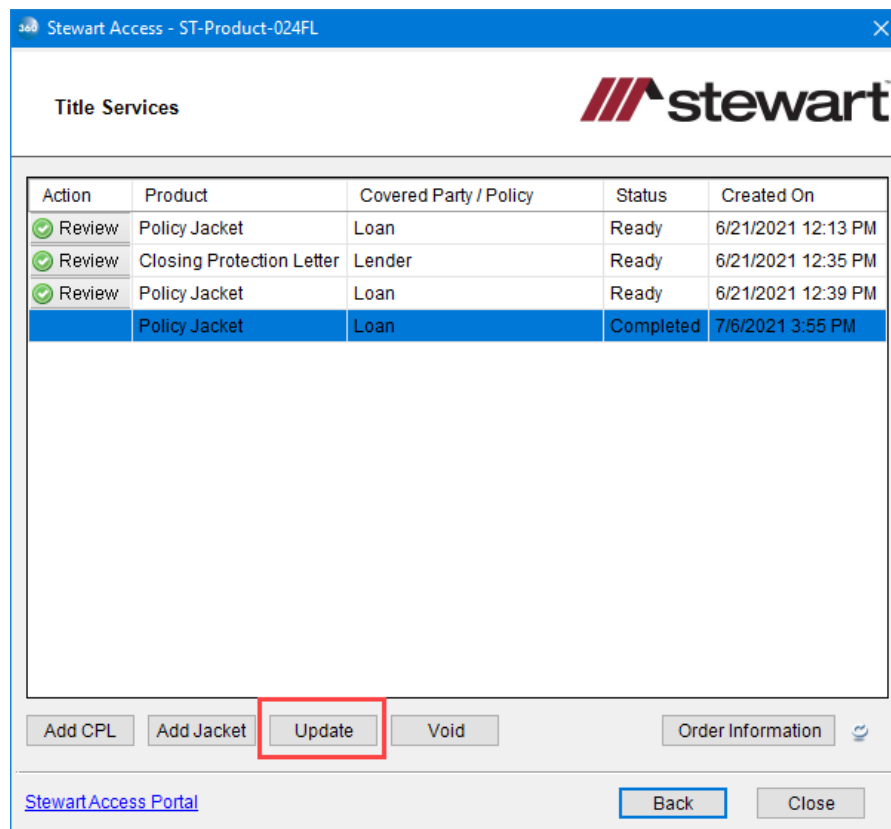

Figure 12 – Title Services – Update Button

Voiding a CPL or Jacket

You can void a CPL or Jacket if it has been issued and has a 360 status of *Ready* or *Completed*.

- On the Title Insurance Services screen, highlight a CPL or jacket in a *Completed* status that you wish to void.
- Click the ***Void*** button. You will then be taken to the Void screen for CPLs if you are voiding a CPL and to the Void screen for Jackets if you are voiding a Jacket. Information on the product you selected will display on this screen.
- On either Void screens, you will need to select your reason for canceling this product and then click the ***Void*** button on this screen. This will send this information to Stewart and the status of the transaction in 360 will change to ***Canceled***.

Figure 133 – Void Screen