Stewart Access

Release Notes

December 6, 2019

Version 2.2.11 (Portal & Express)

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Stewart Access 2.2.11 Release Notes

Stewart Access 2.2.11 includes enhancements for *Stewart Access Portal and Express.*

Deployment Date: December 6, 2019

New in This Release (Portal)

An overview of new features and modifications to Stewart Access Portal 2.2.11 include:

- In the **Policy Register Report**, the **CPL** data will be filtered and displayed based on the Effective Date of the Jacket.

New in This Release (Express)

An overview of new features and modifications to Stewart Access Express 2.2.11 include:

- Ability to **Save** and **Issue** Post Policy Endorsements.
- Ability to **Revise** Post Policy Endorsement pricing.
- Ability to **Cancel** Post Policy Endorsements.

Portal Enhancements

Policy Register Report – Display Total for Premium Tax Amount
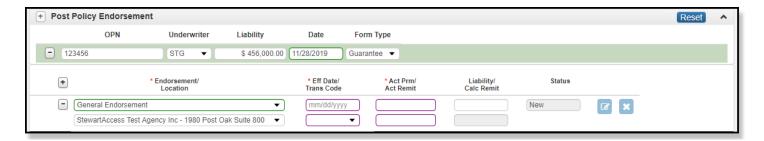
When generating a **Policy Register Report**, if the State requires Premium Tax calculations then the **Total Premium Tax** amount will be displayed within the Report.

Express Enhancements

Save/Issue Post Policy Endorsements

Users can now **Save**, **Issue** and **Cancel** Post Policy Endorsements. The following options are available for the users:

- Create a Post Policy Endorsement using the Original Stewart Policy
- Add an Original Prior Policy manually and TPS policy to create a Post Policy Endorsement
- Add or Edit a Property to a Post Policy Endorsement

Adding an Original Jacket by selecting a Stewart Access OPN

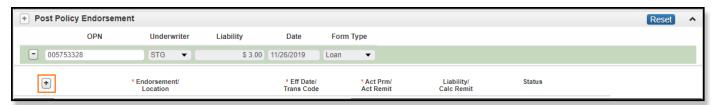Follow these steps to add an Original Jacket that exists in Stewart Access:

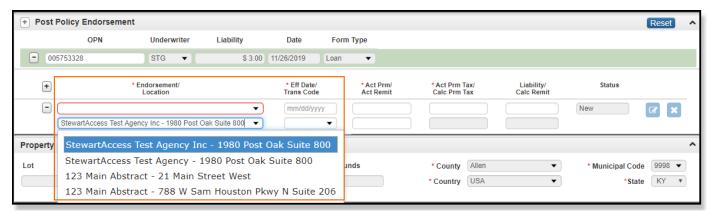1. Click the Add button in **Post Policy Endorsement** section.

2. By default, the cursor will be on the *OPN field* and will display the serial numbers for jackets issued on the file.
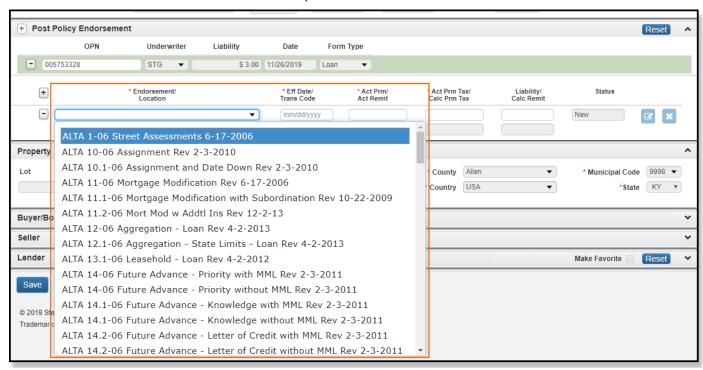3. Choose the *OPN* from the list.

4. By default, **Underwriter**, **Liability**, **Date**, **Form Type** are populated from the **Original Policy** and fields are read only.
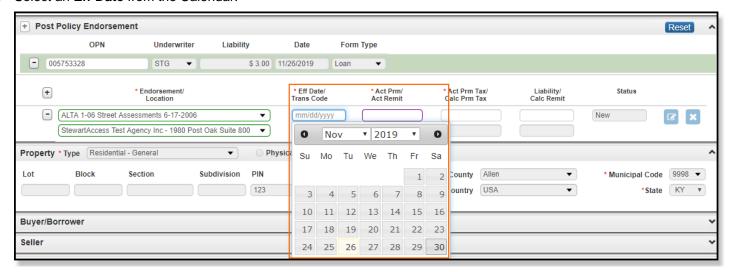5. Click the Add button to add the **Endorsement**.

6. By default, the *Location* field displays file's location. Accept the default or select a location from the *Location* drop-down.
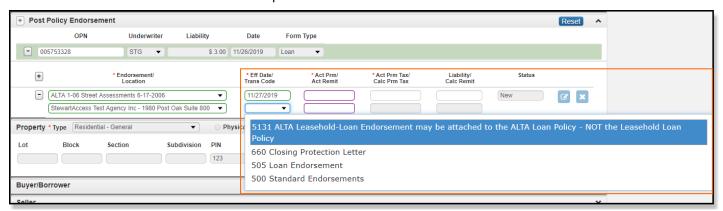

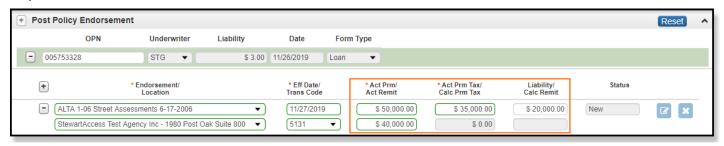7. Select an endorsement from the *Endorsement* drop-down.

8. Select an **Eff Date** from the Calendar.

9. Select a trans code from the *Trans Code* drop-down.

10. Enter in the amounts, such as **Actual Premium**, **Actual Remittance**, **Actual Premium Tax**, and **Liability** in their respective fields.
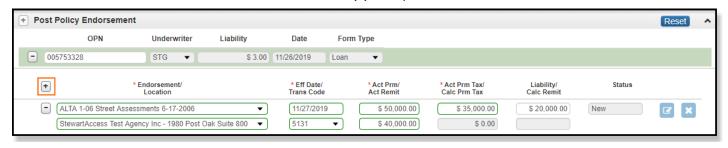

Note

Actual Remittance, Actual Premium Tax fields are required while the **Liability** amount field is optional. However, **Actual Premium Tax** is required for the state of *Kentucky* only.
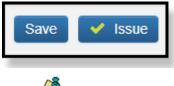
11. Click the Add button to add the **Additional Endorsement(s)**, if required.

 Note

If there is no CPL/Jacket on the file, users will need to enter the required **Property** information before **Saving** or **Issuing** the PPE.
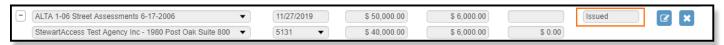
12. Click **Save** button on the bottom of the page to save the endorsements, and then **Issue** button on the bottom of the page to issue the endorsements.

 Note

The **Endorsements** can be issued directly without clicking on **Save**.

13. The **Status** is displayed as *Issued*.

 Note

The Endorsements which are not issued yet will display **Draft** as its status.
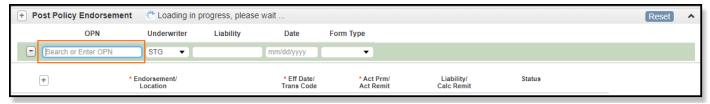
Manually adding an Original Jacket

Follow these steps to manually add an Original Jacket that does not exist in Stewart Access:

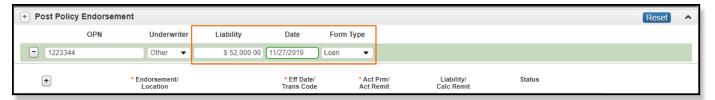1. Click the **Add** button in Post Policy Endorsement section.

2. By default, the cursor will be on the *OPN* field and will display the serial numbers for jackets issued on the file.
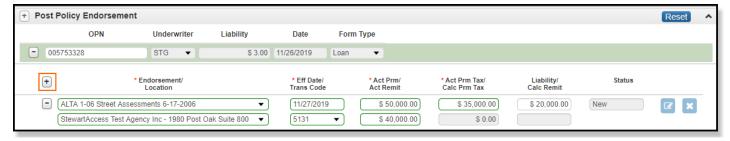3. Manually enter the **Original Policy Number** in the *OPN* field.

4. By default, the Underwriter will be **STG** for all the States, however for *New York*, it will be **STIC**. Users can also manually select **STG**, **STIC**, or **Other** as the Underwriter.
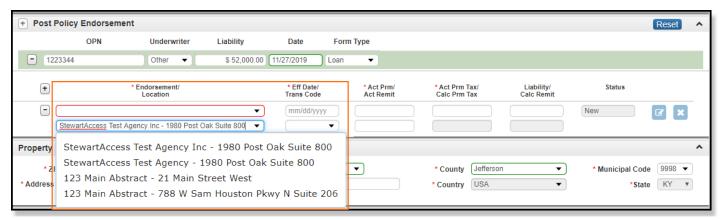

5. Enter the **Liability** amount, select the **Date** from the calendar menu, and select the **Form Type** from the drop-down menu.
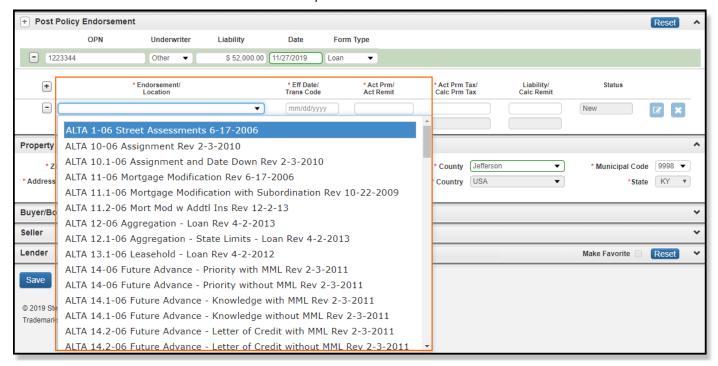

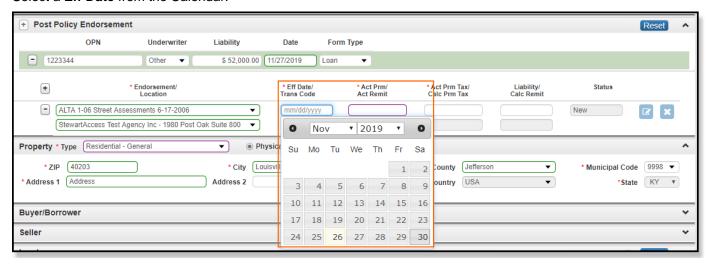6. Click the **Add** button to add the **Endorsement(s)**.

7. By default, the *Location* field displays file's location. Accept the default or select a location from the *Location* drop-down.
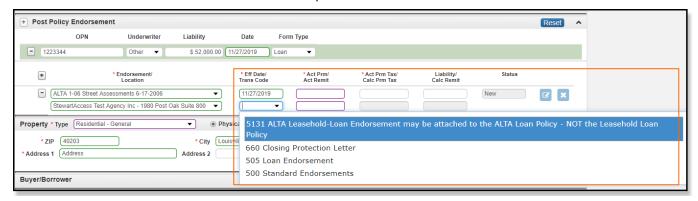

8. Select an endorsement from the **Endorsement** drop-down.

9. Select a **Eff Date** from the Calendar.

10. Select a transaction code from the **Trans Code** drop-down.

11. Enter in the amounts, such as **Actual Premium**, **Actual Remittance**, **Actual Premium Tax**, and **Liability** in their respective fields.
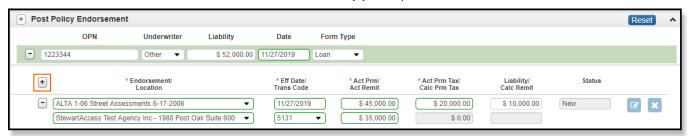

Note

Actual Remittance, Actual Premium Tax fields are required while the **Liability** amount field is optional. However, **Actual Premium Tax** is required for the state of *Kentucky* only.

12. Click the **Add** button to add the **Additional Endorsement(s)**, if required.

 Note

If there is no CPL/Jacket on the file, users will need to enter the required **Property** information before **Saving** or **Issuing** the PPE.

13. Click **Save** button on the bottom of the page to save the endorsements, and then **Issue** button on the bottom of the page to issue the endorsements.

14. The **Status** is displayed as Issued.

Cancel Post Policy Endorsements

Users can now **cancel** an issued Post Policy Endorsement in Express. Once cancelled, the endorsement status will change to **Cancelled**. Follow these steps to cancel an **Issued Endorsement**:

1. Click on **Express**, located in the *Stewart Access* menu at the top.

2. By default, the *Agency* field displays your agency's name. Leave it as default, or if available, select an agency from the **Agency** drop-down.

3. Provide the **File Number** and press **Enter** on your keyboard.

4. The file will open, and the **Post Policy Endorsement** details will display.

5. Click the **Select Post Policy Endorsement** button in the Post Policy Endorsement section.

6. Click the **Cancel Endorsement** button to cancel the **Issued Endorsement**.

7. The endorsement status will be changed to **Cancelled**.

Revise Post Policy Endorsements

Users can now **revise** an issued Post Policy Endorsement in Express. Follow these steps to do revisions:

1. Click on **Express**, located in the *Stewart Access* menu at the top.

2. By default, the *Agency* field displays your agency's name. Leave it as default, or if available, select an agency from the *Agency* drop-down.
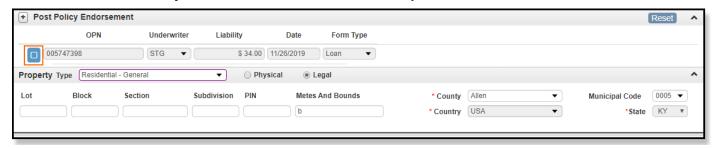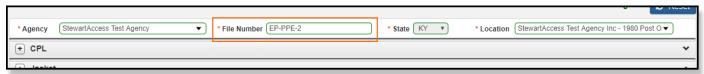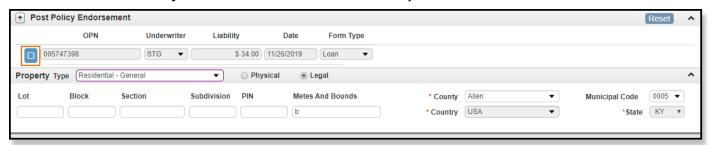

3. Provide the **File Number** and press **Enter** on your keyboard.

4. The file will open, and the Post Policy Endorsement details will display.

5. Click the **Select Post Policy Endorsement** button in the Post Policy Endorsement section.

6. Click the **Edit Endorsement Pricing** button.

> 🗒️ **Note**
>
> Users can edit **Actual Remittance**, **Actual Premium**, **Liability** and **Trans Code** during revision. **Actual Premium Tax** is only editable for the state of *Kentucky*.

7. Make any Endorsement revisions.

8. If needed, click the **Undo** button to cancel any revisions made on the endorsement. The details will revert to the pre-revision Endorsement.

9. When finished with your edits, click the **Save** button. The revisions will be made and will be displayed in the **Endorsements** section.

Additional Information

Training

More information about Stewart Access functionality is available in the Stewart Access Online Help. For additional training and documentation including Quick Reference Cards, please see the [Stewart Access Training Center](#).

Technical Support

For technical support, contact the Stewart Customer Care Center at 1.877.800.3132 or CustomerCare@stewart.com.