



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

The screenshot shows the 'Post Policy Endorsement' form. At the top, there are fields for OPN (123456), Underwriter (STG), Liability (\$ 456,000.00), Date (11/28/2019), and Form Type (Guarantee). Below this is a section for Endorsement/Location (General Endorsement), Eff Date/Trans Code (mm/dd/yyyy), Act Prm/Act Remit, Liability/Calc Remit, and Status (New). A dropdown menu for Endorsement/Location shows 'StewartAccess Test Agency Inc - 1980 Post Oak Suite 800'.

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.

The screenshot shows the 'Post Policy Endorsement' form with the 'Property Type' dropdown menu open, showing 'Residential - General' selected. Other fields include ZIP, City, County (Allen), Municipal Code (9998), Address 1, Address 2, Country (USA), and State (KY).

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.

The screenshot shows the 'Post Policy Endorsement' form with the 'OPN' field highlighted. A dropdown menu is open, showing 'M-0000-005753328 - EP-PPE-3' selected. Other fields include Underwriter (STG), Date (mm/dd/yyyy), and Form Type.

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**.

The screenshot shows the 'Post Policy Endorsement' form with the 'OPN' field populated with '005753328'. Other fields include Underwriter (STG), Liability (\$ 3.00), Date (11/26/2019), and Form Type (Loan). The 'Add' button is highlighted.

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

The screenshot shows the 'Post Policy Endorsement' form. At the top, there are fields for OPN (005753328), Underwriter (STG), Liability (\$ 3.00), Date (11/26/2019), and Form Type (Loan). Below this is a table with columns: * Endorsement/ Location, * Eff Date/ Trans Code, * Act Prm/ Act Remit, * Act Prm Tax/ Calc Prm Tax, Liability/ Calc Remit, and Status. The 'Endorsement/ Location' dropdown is open, showing a list of locations. The selected item is 'StewartAccess Test Agency Inc - 1980 Post Oak Suite 800'. Other visible options include 'StewartAccess Test Agency - 1980 Post Oak Suite 800', '123 Main Abstract - 21 Main Street West', and '123 Main Abstract - 788 W Sam Houston Pkwy N Suite 206'. To the right, there are fields for County (Allen), Country (USA), Municipal Code (9998), and State (KY).

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

The screenshot shows the 'Post Policy Endorsement' form with the 'Endorsement/ Location' dropdown menu open. The dropdown list contains the following items: 'ALTA 1-06 Street Assessments 6-17-2006', 'ALTA 10-06 Assignment Rev 2-3-2010', 'ALTA 10.1-06 Assignment and Date Down Rev 2-3-2010', 'ALTA 11-06 Mortgage Modification Rev 6-17-2006', 'ALTA 11.1-06 Mortgage Modification with Subordination Rev 10-22-2009', 'ALTA 11.2-06 Mort Mod w Addtl Ins Rev 12-2-13', 'ALTA 12-06 Aggregation - Loan Rev 4-2-2013', 'ALTA 12.1-06 Aggregation - State Limits - Loan Rev 4-2-2013', 'ALTA 13.1-06 Leasehold - Loan Rev 4-2-2012', 'ALTA 14-06 Future Advance - Priority with MML Rev 2-3-2011', 'ALTA 14-06 Future Advance - Priority without MML Rev 2-3-2011', 'ALTA 14.1-06 Future Advance - Knowledge with MML Rev 2-3-2011', 'ALTA 14.1-06 Future Advance - Knowledge without MML Rev 2-3-2011', 'ALTA 14.2-06 Future Advance - Letter of Credit with MML Rev 2-3-2011', and 'ALTA 14.2-06 Future Advance - Letter of Credit without MML Rev 2-3-2011'. The 'ALTA 1-06 Street Assessments 6-17-2006' item is highlighted. The background shows the same form fields as the previous screenshot, including the 'Save' button and copyright information.

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

The screenshot shows the 'Post Policy Endorsement' form. A calendar is open for November 2019, with the date 11/26/2019 selected. The form fields are as follows:

OPN	Underwriter	Liability	Date	Form Type
005753328	STG	\$ 3.00	11/26/2019	Loan

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

The screenshot shows the 'Post Policy Endorsement' form with the 'Trans Code' drop-down menu open. The date field is set to 11/27/2019. The menu options are:

- 5131 ALTA Leasehold-Loan Endorsement may be attached to the ALTA Loan Policy - NOT the Leasehold Loan Policy
- 660 Closing Protection Letter
- 505 Loan Endorsement
- 500 Standard Endorsements

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

The screenshot shows the 'Post Policy Endorsement' form with the amount fields filled in. The date is 11/27/2019 and the Trans Code is 5131. The amount fields are:

* Act Prm/ Act Remit	* Act Prm Tax/ Calc Prm Tax	Liability/ Calc Remit
\$ 50,000.00	\$ 35,000.00	\$ 20,000.00
\$ 40,000.00	\$ 0.00	



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.

OPN	Underwriter	Liability	Date	Form Type						
005753328	STG	\$ 3.00	11/26/2019	Loan						



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*.

ALTA 1-06 Street Assessments 6-17-2006	11/27/2019	\$ 50,000.00	\$ 6,000.00		Issued	
StewartAccess Test Agency Inc - 1980 Post Oak Suite 800	5131	\$ 40,000.00	\$ 6,000.00	\$ 0.00		



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.

The screenshot shows the 'Post Policy Endorsement' form. The 'Property Type' is set to 'Residential - General'. There are radio buttons for 'Physical' (selected) and 'Legal'. Fields for ZIP, City, County (Allen), Address 1, Address 2, Country (USA), Municipal Code (9998), and State (KY) are visible. A 'Reset' button is in the top right corner.

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.

The screenshot shows the 'Post Policy Endorsement' form with a table. The table has columns: OPN, Underwriter, Liability, Date, and Form Type. The OPN field contains a search prompt 'Search or Enter OPN'. The Underwriter is set to 'STG'. A 'Loading in progress, please wait ...' message is displayed above the table. A 'Reset' button is in the top right corner.

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.

The screenshot shows the 'Post Policy Endorsement' form with the Underwriter dropdown menu open. The menu options are 'Other', 'STG', and 'STIC'. The OPN field contains '1223344'. A 'Reset' button is in the top right corner.

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

The screenshot shows the 'Post Policy Endorsement' form with the Liability, Date, and Form Type fields filled in. The Liability is '\$ 52,000.00', the Date is '11/27/2019', and the Form Type is 'Loan'. The OPN field contains '1223344'. A 'Reset' button is in the top right corner.

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

The screenshot shows the 'Post Policy Endorsement' form with the 'Add' button highlighted. The table has columns: OPN, Underwriter, Liability, Date, Form Type, Endorsement/Location, Eff Date/Trans Code, Act Prm/Act Remit, Act Prm Tax/Calc Prm Tax, Liability/Calc Remit, and Status. The first row has OPN '005753328', Underwriter 'STG', Liability '\$ 3.00', Date '11/26/2019', Form Type 'Loan', and Status 'New'. The second row has OPN 'ALTA 1-06 Street Assessments 6-17-2006', Eff Date '11/27/2019', Act Prm '\$ 50,000.00', Act Prm Tax '\$ 35,000.00', Liability '\$ 20,000.00', and Status 'New'. A 'Reset' button is in the top right corner.

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

The screenshot shows the 'Post Policy Endorsement' form. At the top, there are fields for OPN (1223344), Underwriter (Other), Liability (\$52,000.00), Date (11/27/2019), and Form Type (Loan). Below this is a table with columns: * Endorsement/ Location, * Eff Date/ Trans Code, * Act Prm/ Act Remit, * Act Prm Tax/ Calc Prm Tax, Liability/ Calc Remit, and Status. The first row in the table has a dropdown menu open for the 'Endorsement/ Location' field. The dropdown list includes:

- StewartAccess Test Agency Inc - 1980 Post Oak Suite 800
- StewartAccess Test Agency - 1980 Post Oak Suite 800
- 123 Main Abstract - 21 Main Street West
- 123 Main Abstract - 788 W Sam Houston Pkwy N Suite 206

 The 'Status' field is set to 'New'. To the right of the table, there are fields for * County (Jefferson), * Municipal Code (9998), * Country (USA), and * State (KY). A 'Reset' button is visible in the top right corner.

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

This screenshot shows the same 'Post Policy Endorsement' form, but with a different dropdown menu open for the 'Endorsement/ Location' field. The dropdown list is much longer and includes various ALTA endorsement types:

- ALTA 1-06 Street Assessments 6-17-2006
- ALTA 10-06 Assignment Rev 2-3-2010
- ALTA 10.1-06 Assignment and Date Down Rev 2-3-2010
- ALTA 11-06 Mortgage Modification Rev 6-17-2006
- ALTA 11.1-06 Mortgage Modification with Subordination Rev 10-22-2009
- ALTA 11.2-06 Mort Mod w Addtl Ins Rev 12-2-13
- ALTA 12-06 Aggregation - Loan Rev 4-2-2013
- ALTA 12.1-06 Aggregation - State Limits - Loan Rev 4-2-2013
- ALTA 13.1-06 Leasehold - Loan Rev 4-2-2012
- ALTA 14-06 Future Advance - Priority with MML Rev 2-3-2011
- ALTA 14-06 Future Advance - Priority without MML Rev 2-3-2011
- ALTA 14.1-06 Future Advance - Knowledge with MML Rev 2-3-2011
- ALTA 14.1-06 Future Advance - Knowledge without MML Rev 2-3-2011
- ALTA 14.2-06 Future Advance - Letter of Credit with MML Rev 2-3-2011
- ALTA 14.2-06 Future Advance - Letter of Credit without MML Rev 2-3-2011

 The 'Status' field is still 'New'. The 'County' is 'Jefferson', 'Municipal Code' is '9998', 'Country' is 'USA', and 'State' is 'KY'. A 'Save' button is visible in the bottom left corner, and a 'Reset' button is in the bottom right corner.

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

The screenshot shows the 'Post Policy Endorsement' form. A calendar is open for November 2019, with the date 11/27/2019 selected. The form fields are as follows:

OPN	Underwriter	Liability	Date	Form Type
1223344	Other	\$ 52,000.00	11/27/2019	Loan

Below the header, there are fields for Endorsement/Location, Property Type (Residential - General), ZIP (40203), City (Louisville), and Address 1. A table for Eff Date/Trans Code, Act Prm/Act Remit, Act Prm Tax/Calc Prm Tax, and Liability/Calc Remit is also visible, with the date 11/27/2019 entered in the first column.

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

The screenshot shows the 'Post Policy Endorsement' form with the 'Trans Code' drop-down menu open. The menu options are:

- 5131 ALTA Leasehold-Loan Endorsement may be attached to the ALTA Loan Policy - NOT the Leasehold Loan Policy
- 660 Closing Protection Letter
- 505 Loan Endorsement
- 500 Standard Endorsements

The form fields are the same as in the previous screenshot, with the date 11/27/2019 entered in the 'Eff Date/Trans Code' field.

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

The screenshot shows the 'Post Policy Endorsement' form with the final values entered in the 'Act Prm/Act Remit', 'Act Prm Tax/Calc Prm Tax', and 'Liability/Calc Remit' fields. The values are:

Act Prm/Act Remit	Act Prm Tax/Calc Prm Tax	Liability/Calc Remit
\$ 45,000.00	\$ 20,000.00	\$ 10,000.00
\$ 35,000.00	\$ 0.00	

The form fields are the same as in the previous screenshots, with the date 11/27/2019 and Trans Code 5131 entered.



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.

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

The screenshot shows the 'Post Policy Endorsement' form. At the top, there are fields for OPN (1223344), Underwriter (Other), Liability (\$52,000.00), Date (11/27/2019), and Form Type (Loan). Below this is a table with columns: * Endorsement/ Location, * Eff Date/ Trans Code, * Act Prm/ Act Remit, * Act Prm Tax/ Calc Prm Tax, Liability/ Calc Remit, and Status. Two rows are visible: one for 'ALTA 1-06 Street Assessments 6-17-2006' and another for 'StewartAccess Test Agency Inc - 1980 Post Oak Suite 800'. A red box highlights the '+' button in the first column of the table.



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.

- 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.



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

This screenshot is similar to the previous one but shows the 'Status' column for the second row, 'StewartAccess Test Agency Inc - 1980 Post Oak Suite 800', with the value 'Issued' highlighted by a red box.

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**:

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

The screenshot shows the top navigation bar of the Stewart Access system. The 'Express' menu item is highlighted with a red box. Other menu items include Stewart Access, File, CPL, Jacket, Post Policy Endorsement, Register, Contact, and Help. The user's email 'msaud@dev.picdev.local' and a 'Log off' button are visible in the top right corner.

- 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.

This screenshot shows the form below the navigation bar. The 'Agency' dropdown menu is highlighted with a red box and contains the text 'StewartAccess Test Agency'. Other fields for 'File Number', 'State', and 'Location' are visible but empty.

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

The screenshot shows a search interface with the following fields:

- * Agency: StewartAccess Test Agency
- * File Number: EP-PPE-2 (highlighted with an orange box)
- * State: KY
- * Location: StewartAccess Test Agency Inc - 1980 Post O

Below the search fields, there is a section labeled '+ CPL' with a dropdown arrow.

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

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

+ Post Policy Endorsement
Reset

OPN	Underwriter	Liability	Date	Form Type
005747398	STG	\$ 34.00	11/26/2019	Loan

Property Type: Residential - General | Physical | Legal

Lot	Block	Section	Subdivision	PIN	Metes And Bounds	* County	Municipal Code	* State
					b	Allen	0005	KY

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

-	ALTA 1-06 Street Assessments 6-17-2006	11/27/2019	\$ 50,000.00	\$ 6,000.00		Issued	✕
	StewartAccess Test Agency Inc - 1980 Post Oak Suite 800	5131	\$ 40,000.00	\$ 6,000.00	\$ 0.00		

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

-	ALTA 1-06 Street Assessments 6-17-2006	11/27/2019	\$ 50,000.00	\$ 6,000.00		Cancelled	✕
	StewartAccess Test Agency Inc - 1980 Post Oak Suite 800	5131	\$ 40,000.00	\$ 6,000.00	\$ 0.00		

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.

Agency	Date	Actual Remittance	Actual Premium	Liability	Trans Code
ALTA 1-06 Street Assessments 6-17-2006	11/27/2019	\$ 150.00	\$ 10.50		Issued
StewartAccess Test Agency Inc - 1980 Post Oak Suite 800	5131	\$ 322.00	\$ 10.50	\$ 0.00	



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.

Agency	Date	Actual Remittance	Actual Premium	Liability	Trans Code
ALTA 1-06 Street Assessments 6-17-2006	11/27/2019	\$ 150.00	\$ 11.20		Issued
StewartAccess Test Agency Inc - 1980 Post Oak Suite 800	5131		\$ 11.20		

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

<input type="checkbox"/>	ALTA 1-06 Street Assessments 6-17-2006	11/27/2019	\$ 160.00	\$ 11.20		Issued		
	StewartAccess Test Agency Inc - 1980 Post Oak Suite 800	5131		\$ 11.20				

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

<input type="checkbox"/>	ALTA 1-06 Street Assessments 6-17-2006	11/27/2019	\$ 160.00	\$ 11.20		Issued		
	StewartAccess Test Agency Inc - 1980 Post Oak Suite 800	5131		\$ 11.20				

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.