



Stewart Access

Release Notes

August 23, 2019

Version 2.2.9 (Portal & Express)

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Table of Contents

Stewart Access 2.2.9 Release Notes	1
New in This Release (Portal)	1
New in This Release (Express).....	2
Portal Enhancements	3
Premium Tax Calculations in Jackets for Kentucky (KY):	3
Revision with Premium Tax in Jackets for Kentucky (KY):.....	5
Premium Tax Calculations in Post Policy Endorsement for Kentucky (KY):	7
Error Message for Premium Tax Calculations:	7
Express Enhancements	10
Ability to provide a Municipal Code on Property in States that require on CPLs and Jackets:10	
Jacket Pricing and Endorsement Pricing:.....	10
CPL Pricing with Premium Tax for Kentucky (KY):	11
Error Message for Premium Tax Calculations:	12
Additional Information	14
Training.....	14
Technical Support	14

Stewart Access 2.2.9 Release Notes

Stewart Access 2.2.9 includes enhancements for *Stewart Access Portal and Express*.

Deployment Date: August 23, 2019

New in This Release (Portal)

An overview of new features and modifications to Stewart Access Portal 2.2.9 include:

Premium Tax Calculations in Jackets for Kentucky (KY):

- While creating **Jackets**, users will now see **Actual Premium Tax** and **Calculated Premium Tax** fields in **Jacket Pricing** and **Endorsement Pricing**. This is only applicable in States where tax calculations are required (i.e. KY).
- While creating **Jackets**, users will now see **Actual Fee Tax** and **Calculated Fee Tax** fields in **CPL Pricing**. This is only applicable in States where tax calculations are required (i.e. KY).

Note: These Premium Tax Calculations are based on the Property's Municipal Code.

Revision with Premium Tax for Kentucky (KY):

- When revising an **Issued Jacket** with **Premium Tax**, users can now revise the **Actual Premium Tax**.
- When revising an **Endorsement** on an **Issued Jacket** with **Premium Tax**, users can now revise the **Actual Premium Tax**.
- When revising **CPL Pricing Line Item** on an **Issued Jacket** with **Premium Tax**, users can now revise the **Actual Fee Tax**.

Premium Tax Calculations in Post Policy Endorsements for Kentucky (KY):

- **Post Policy Endorsements** will now show **Actual Premium Tax** and **Calculated Premium Tax** fields for **Jackets**, based on the State that require tax calculations (i.e. KY).

A new error message pop-up will appear when:

- The **Actual Premium Tax** field is empty while **Issuing** or **Revising** a Jacket or Post Policy Endorsement.
- The **Actual Fee Tax** field is empty while **Revising** a CPL Pricing Line Item.

New in This Release (Express)

An overview of new features and modifications to Stewart Access Express 2.2.9 include:

- Ability to provide **Municipal Code** on the Property for the States that require Municipal Code on **CPLs** and **Jackets**.
- **Premium Tax Calculations** in Jackets for Kentucky (KY):
 - While creating **Jackets**, users will now see **Actual Premium Tax** and **Calculated Premium Tax** fields in **Jacket Pricing** and **Endorsement Pricing**. This is only applicable in States where tax calculations are required (i.e. KY).
 - While creating **Jackets**, users will now see **Actual Fee Tax** and **Calculated Fee Tax** fields in **CPL Pricing**. This is only applicable in States where tax calculations are required (i.e. KY).
Note: Premium tax calculations are based on the property Municipal Code
- **CPL Pricing Revision with Premium Tax** for Kentucky (KY):
 - When revising **CPL Pricing Line Item** on an **Issued Jacket** with **Premium Tax**, users can now revise the **Actual Fee Tax**.
- A new error message pop-up will appear when:
 - The **Actual Premium Tax** field is empty while **Issuing** or **Revising** a Jacket or Post Policy Endorsement.
 - The **Actual Fee Tax** field is empty while **Revising** a CPL Pricing Line Item.

Portal Enhancements

Premium Tax Calculations in Jackets for Kentucky (KY):

In this release, users can now add **Premium Tax Calculations** on Jacket Pricing, Endorsement Pricing, and CPL Pricing on Jackets, if it is required by State (i.e. Kentucky).

Jacket Pricing and Endorsement Pricing

In Jacket Pricing or Endorsement Pricing while creating a Jacket, new fields called *Actual Premium Tax* and *Calculated Premium Tax* fields have been added in the Line Item.

When in **Jacket Pricing**:

The screenshot shows the Stewart Access interface with the 'Jacket Pricing' tab selected. The 'Actual Premium Tax' and 'Calculated Premium Tax' fields in the table below are highlighted with orange boxes.

Trans Code	Actual Premium	Actual Remittance	Actual Premium Tax	Serial Number	Calculated Remittance	Calculated Premium Tax
203	\$100.00	\$0	\$8.00	XXXXX5233	\$0	\$8.00

When in **Endorsement Pricing**:

The screenshot shows the Stewart Access interface with the 'Endorsement Pricing' tab selected. The 'Actual Premium Tax' and 'Calculated Premium Tax' fields in the table below are highlighted with orange boxes.

Endorsement	Actual Premium	Actual Remittance	Actual Premium Tax	Trans Code	Calculated Premium Tax	Status
ALTA 6.2-06...	\$100.00	\$0	\$8.00	5131	\$8.00	Draft

When entering in the Actual Premium, the *Actual Premium Tax* and *Calculated Premium Tax* are pre-calculated based on the **Actual Premium** and tax percentage in correspondence to its **Municipal Code** on the Jacket Primary Property.

Users can **edit** and **change** the Actual Premium Tax manually as well.

CPL Pricing

In CPL Pricing while creating a Jacket, new fields called *Actual Fee Tax* and *Calculated Fee Tax* fields have been added in the Line Item.

Stewart Access File Express CPL Jacket Post Policy Endorsement Register Contact Help TPSTESTER1@dev.picdev.local Log off

Policy#: XXXXX5233 Status: Draft

File Number: RRTEST08072019-2 Location: StewartAccess Test Agency Liability: \$ 123,112.00

Agency: StewartAccess Test Agency Form Type: Loan Total Premium: \$ 200.00

Date: 8/7/2019 Form: ALTA Loan Policy 6-17-200 Total Remittance: \$ 0

State: KY Transaction Type:

Property 1 Parties 1 Original 0 Endorsements 1 Jacket Pricing 1 **CPL Pricing 1**

CPL Fee Amount	Actual Remittance	Actual Fee Tax	Serial Number	Calculated Fee	Calculated Remittance	Calculated Fee Tax	
\$50.00	\$50.00	\$5.00	997858259	\$50.00	\$50.00	\$5.00	Void

When entering in the Actual Premium, the *Actual Fee Tax* and *Calculated Fee Tax* are pre-calculated based on the **Actual Fee Tax** and tax percentage in correspondence to its **Municipal Code** on the Jacket Primary Property. You can **edit** and **change** the Actual Fee Tax manually as well.

Revision with Premium Tax in Jackets for Kentucky (KY):

When revising a Jacket, you can now revise the *Actual Premium Tax* as well.

Revise Jacket Save Cancel

Liability \$ 123,112.00

Charges

Actual Premium \$ 100 Actual Remittance \$ 0 Trans Code 203 (Secondary Mark...)

Actual Premium Tax \$ 8.00

Primary Property

Property Type Single Family Dwelling County Adair Municipal Code 0015

Original Jacket

Filenumber Agency StewartAccess Tes OPN

Original Jacket

Underwriter STG State KY Liability \$

Date mm/dd/yyyy OPN Form Type Guarantee

You can also revise the *Actual Premium Tax* on Endorsements on an Issued Jacket

Stewart Access File Express CPL Jacket Post Policy Endorsement Register Contact Help TPSTESTER1@dev.plcdev.local Log off

Policy#: 997865233 Status: Issued

File Number RRTEST08072019-2 Location StewartAccess Test Agency Liability \$ 123,112.00

Agency StewartAccess Test Agency Form Type Loan Total Premium \$ 200.00

Date 8/7/2019 Form ALTA Loan Policy 6-17-200 Total Remittance \$ 0

State KY Transaction Type

Property 1 Parties 1 Original 0 **Endorsements 1** Jacket Pricing 1 CPL Pricing 1

Endorsement	Actual Premium	Actual Remittance	Actual Premium Tax	Trans Code	Calculated Premium Tax	Status
ALTA 6 2-06...	\$100.00	\$0	\$8.00	5131	\$8.00	Issued

Similarly, you can also revise *Actual Fee Tax* on a CPL Pricing Line Item on Issued Jacket.

The screenshot shows the Stewart Access web application interface. At the top, there is a navigation bar with the following items: Stewart Access, File, Express, CPL, Jacket (selected), Post Policy Endorsement, Register, Contact, and Help. The user's email address is TPSTESTER1@dev.plcdev.local and there is a Log off button.

Below the navigation bar, there are several form fields for policy information:

- File Number: RRTEST09072019-2
- Location: StewartAccess Test Agency
- Liability: \$ 123,112.00
- Agency: StewartAccess Test Agency
- Form Type: Loan
- Total Premium: \$ 200.00
- Date: 8/7/2019
- Form: ALTA Loan Policy 6-17-200
- Total Remittance: \$ 0
- State: KY
- Transaction Type: (empty)

Below the form fields, there are several tabs: Property (1), Parties (1), Original (0), Endorsements (1), Jacket Pricing (1), and CPL Pricing (1). The CPL Pricing tab is highlighted with an orange box.

Under the CPL Pricing tab, there is a table with the following data:

CPL Fee Amount	Actual Remittance	Actual Fee Tax	Serial Number	Calculated Fee	Calculated Remittance	Calculated Fee Tax	
\$50.00	\$50.00	\$5.00	997858259	50	50	\$5.00	Void

Premium Tax Calculations in Post Policy Endorsement for Kentucky (KY):

In this release, users can now see **Premium Tax Calculations on Endorsement Pricing** in Post Policy Endorsement, if it is required by State (i.e. Kentucky).

Stewart Access File Express CPL Jacket Post Policy Endorsement Register Contact Help TPSTESTER1@dev.picdev.local Log off

Original Jacket

File Number: RRTEST08072019-2 Agency: StewartAccess Test Agency Search

Original Jacket: + OPN 997865233 Type: Loan

OPN: 997865233 State: KY Liability: \$ 123,112.00

Original Policy Date: 8/7/2019 Form Type: Loan Underwriter: STG

Endorsement 1 Property 1

Date	Location	Endorsement	Actual Premium	Actual Remittance	Actual Premium Tax	Calculated Premium Tax	Status
8/7/20...	StewartAccess...	ALTA 5 1-06 ...	\$100.00	\$0	\$8.00	\$8.00	Draft

Error Message for Premium Tax Calculations:

While **Issuing** or **Revising** a Jacket or Post Policy Endorsement, if the *Actual Premium Tax* field is left empty then you will be notified with an error message.

For **Jacket Pricing** while creating a Jacket:

Stewart Access File Express CPL Jacket Post Policy Endorsement Register Contact Help TPSTESTER1@dev.picdev.local Log off

Policy#: XXXXX0138 Status: Draft

File Number: RRTEST08072019-3 Location: StewartAccess Test Agency Liability: \$ 123.00

Agency: StewartAccess Test Agency Form Type: Loan Total Premium: \$ 200.00

Date: 8/7/2019 Form: ALTA Loan Policy 6-17-200 Total Remittance: \$ 0

State: KY Transaction Type:

Property 1 Parties 0 Original 0 Endorsements 1 Jacket Pricing 1 CPL Pricing 1

Trans Code	Actual Premium	Actual Remittance	Actual Premium Tax	Serial Number	Calculated Remittance	Calculated Premium
203	\$100.00	\$0.00		XXXXX0138	\$0.00	\$8.00

Error

- An actual premium, actual remittance, actual premium tax and trans code are required for jacket pricing.

OK

For **Endorsement Pricing** while creating a Jacket:

The screenshot shows the Stewart Access interface in the 'Jacket' tab. The 'Post Policy Endorsement' sub-tab is active. The form contains the following fields: File Number (RRTEST08072019-3), Location (StewartAccess Test Agency), Liability (\$ 123.00), Agency (StewartAccess Test Agency), Form Type (Loan), Total Premium (\$ 200.00), Date (8/7/2019), Form (ALTA Loan Policy 6-17-200), Total Remittance (\$ 0), State (KY), and Transaction Type. Below the form are tabs for Property (1), Parties (0), Original (0), Endorsements (1), Jacket Pricing (1), and CPL Pricing (1). An error dialog box is displayed over the Endorsements table, stating: 'Error: An actual premium, actual remittance, actual premium tax and trans code are required for endorsement pricing.' The table below the error has the following data:

Endorsement	Actual Premium	Actual Remittance	Actual Premium Tax	Trans Code	Serial Number	Calculated R
ALTA 4-06 Condominium ...	\$100.00	\$0		500	XXXXX0287	\$0

When in **Post-Policy Endorsement**:

The screenshot shows the Stewart Access interface in the 'Post Policy Endorsement' sub-tab. The form contains the following fields: File Number (RRTEST08072019-2), Agency (StewartAccess Test Agency), Original Jacket (+ OPN 997865233 Type Loar), OPN (997865233), State (KY), Liability (\$ 123,112.00), Original Policy Date (8/7/2019), and Underwriter (STG). An error dialog box is displayed over the table, stating: 'Error: An actual premium, actual remittance, actual premium tax, endorsement name, endorsement date, issuing location and trans code are required for endorsement pricing.' The table below the error has the following data:

Date	Location	Endorsement	Actual Premium	Actual Remittance	Actual Premium Tax	Trans Code	Calculated Rem
8/7/20...	StewartAccess...	ALTA 5.1-06 ...	\$100.00	\$0		500	\$0

Similarly, while **Revising** a CPL Pricing Line Item in a Jacket, if the *Actual Fee Tax* field is left empty then you will be notified with the following message:

The screenshot shows the Stewart Access software interface. At the top, there is a navigation bar with 'Stewart Access' and various menu items like 'File', 'Express', 'CPL', 'Jacket', 'Post Policy Endorsement', 'Register', 'Contact', and 'Help'. The user is logged in as 'TPSTESTER1@dev.plcdev.local'. Below the navigation bar, there are several input fields for policy information, including File Number (RRTEST08072019-3), Agency (StewartAccess Test Agency), Date (8/7/2019), State (KY), Location (StewartAccess Test Agency), Form Type (Loan), Form (ALTA Loan Policy 6-17-200), Transaction Type, Liability (\$ 123.00), Total Premium (\$ 200.00), and Total Remittance (\$ 0). Below these fields, there are tabs for 'Property', 'Parties', 'Original', 'Endorsements', 'Jacket Pricing', and 'CPL Pricing'. The 'CPL Pricing' tab is active, showing a table with columns: 'CPL Fee Amount', 'Actual Remittance', 'Actual Fee Tax', 'Serial Number', 'Calculated Fee', 'Calculated Remittance', and 'Calculated Fee'. The table contains one row with values: \$50.00, \$50.00, (empty), 997858379, \$50.00, \$50.00, and \$5.00. An error message dialog box is overlaid on the table, stating: 'Error: A CPL fee amount, actual remittance and actual fee tax are required for CPL pricing.' The error message is highlighted with an orange box.

CPL Fee Amount	Actual Remittance	Actual Fee Tax	Serial Number	Calculated Fee	Calculated Remittance	Calculated Fee
\$50.00	\$50.00		997858379	\$50.00	\$50.00	\$5.00

Express Enhancements

Ability to provide a Municipal Code on Property in States that require on CPLs and Jackets:

Municipal Code will automatically populate on the Jacket based on the Property's **City and State** or **County and State**. User can also choose the Municipal Code manually from list of available codes in the drop-down menu.

The screenshot shows the Stewart Access Express interface. The top navigation bar includes 'Stewart Access', 'File', 'Express', 'CPL', 'Jacket', 'Post Policy Endorsement', 'Register', 'Contact', and 'Help'. The main form area is titled 'New File' and contains several input fields: Agency (StewartAccess Test Agency), File Number (RRTST09122019-6), State (KY), and Location (StewartAccess Test Agency Inc - 1980 Post O). Below these are expandable sections for 'CPL' and 'Jacket'. The 'Jacket' section is expanded to show 'Property Type' (Residential - General), 'Physical' radio button selected, and 'Legal' radio button. Input fields include ZIP (42519), City (Bumside), County (Pulaski), Address 1 (1 Bass Dr), Address 2, Country (USA), and State (KY). A 'Municipal Code' dropdown menu is highlighted with a red box, showing the value '0138'. Other fields include Buyer/Borrower, Seller, and Lender. A 'Make Favorite' checkbox and a 'Reset' button are also visible.

Jacket Pricing and Endorsement Pricing:

While in **Jacket Pricing** or **Endorsement Pricing**, new tax fields called *Act Prem Tax* and *Calc Prem Tax* have been added. When users enter in the Actual Premium, the *Act Prem Tax* and *Calc Prem Tax* are pre-calculated based on the **Actual Premium** amount and tax percentage in correspondence to the **Municipal Code** for the Jacket's Property.

The screenshot shows the Stewart Access Express interface for 'Adding New Jacket'. The top navigation bar is the same as the previous screenshot. The main form area is titled 'Adding New Jacket' and contains several input fields: Agency (StewartAccess Test Agency), File Number (RRTEASA-0), State (KY), and Location (StewartAccess Test Agency Inc - 1980 Post O). Below these are expandable sections for 'CPL' and 'Jacket'. The 'CPL' section is expanded to show a table with columns: Issue Date, Covered Party/Branch, Form, Status, CPL Fee/Act Remit, Act Fee Tax/Calc Fee Tax, and Calc Fee/Calc Remit. The 'Jacket' section is expanded to show a table with columns: Policy Eff Date, Form Type/Form, Liability/Trans Code, Act Prm/Remit, Act Prm Tax/Calc Prm Tax, Calc Remit, Total Prm/Remit, and Status. The 'Act Prm Tax/Calc Prm Tax' column is highlighted with a red box, showing the value '\$ 9.00'. Other fields include 'Original Policy' and a 'Reset' button.

You can edit and change the *Actual Premium Tax* manually as well.

In Endorsements:

Policy Eff Date	Form Type/Form	Liability/Trans Code	Act Pm/Remit	Act Pm Tax/Calc Pm Tax	Calc Remit	Total Pm/Remit	Status
08/12/2019	Loan	\$ 121,212.00	\$ 100.00	\$ 9.00	\$ 15.00	\$ 200.00	New
	ALTA Expanded Coverage R	242	\$ 15.00	\$ 9.00		\$ 23.00	

Endorsement	Trans Code	Act Pm/Act Remit	Act Pm Tax/Calc Pm Tax	Calc Remit	Liability	Status
<input checked="" type="checkbox"/> ALTA 1-06 Street Assessments 6-17-2006	S131	\$ 100.00 \$ 8.00	\$ 9.00 \$ 9.00	\$ 8.00		New
<input type="checkbox"/> ALTA 4-06 Condominium Rev 2-3-2010						New
<input type="checkbox"/> ALTA 4.1-06 Condominium Rev 10-16-2008						New
<input type="checkbox"/> ALTA 5-06 Planned Unit Development Rev 2-3-10						New
<input type="checkbox"/> ALTA 9-06 Restrictions, Encroachments, Minerals Rev 4-2-2012						New

CPL Pricing with Premium Tax for Kentucky (KY):

When creating a **Jacket**, new tax fields called *Act Fee Tax* and *Calc Fee Tax* have been added. These fields are pre-calculated based on the *CPL Fee Amount* and corresponding tax percentage for the **Municipal Code** for the Jacket's Property.

Issue Date	Covered Party/Branch	Form	Status	CPL Fee/Act Remit	Act Fee Tax/Calc Fee Tax	Calc Fee/Calc Remit
08/12/2019	Lender	KY Single Transaction CPL Lender, F	Issued (08/12/2019) #981302862	\$ 50.00 \$ 6.25	\$ 5.00 \$ 5.00	\$ 50.00 \$ 6.25

Users can manually edit the *Actual Fee Tax* as well.

CPL Pricing Revision on Premium Tax for Kentucky (KY):

When revising a **CPL Pricing Line Item**, you can now revise the *Act Fee Tax* as well.

Error Message for Premium Tax Calculations:

When issuing a Jacket, if the *Act Prem Tax* field is left empty on **Jacket Pricing** or **Endorsement Pricing**, then an error message pop-up will appear.

When in **Jacket Pricing**:

The screenshot shows the Stewart Access software interface. The 'Jacket' section is active, displaying a table with columns: Policy Eff Date, Form Type/Form, Liability/Trans Code, Act Prem/Remit, Act Prem Tax/Calc Prem Tax, Calc Remit, Total Prem/Remit, and Status. The 'Act Prem Tax/Calc Prem Tax' field is empty, highlighted with a red box. An error message pop-up is displayed in the center, stating 'Error' and 'Jacket: Act Prem Tax required'. The 'Original Policy' and 'Endorsements' sections are also visible, along with 'CPL Pricing' at the bottom.

Policy Eff Date	Form Type/Form	Liability/Trans Code	Act Prem/Remit	Act Prem Tax/Calc Prem Tax	Calc Remit	Total Prem/Remit	Status
08/12/2019	Loan	\$ 123.00	\$ 100.00		\$ 15.00	\$ 100.00	New
	ALTA Expanded Coverage R	242	\$ 15.00	\$ 9.00		\$ 15.00	

When in **Endorsement Pricing**:

The screenshot shows the Stewart Access software interface. The 'Endorsements' section is active, displaying a table with columns: Endorsement, Trans Code, Act Prem/Act Remit, Act Prem Tax/Calc Prem Tax, Calc Remit, Liability, and Status. The 'Act Prem Tax/Calc Prem Tax' field for the first endorsement is empty, highlighted with a red box. An error message pop-up is displayed in the center, stating 'Error' and 'Endorsement: Act Prem Tax is required'. The 'Jacket' and 'CPL Pricing' sections are also visible.

Endorsement	Trans Code	Act Prem/Act Remit	Act Prem Tax/Calc Prem Tax	Calc Remit	Liability	Status
ALTA 1-06 Street Assessments 6-17-2006	5131	\$ 100.00		\$ 8.00		New
		\$ 8.00	\$ 9.00			

Similarly, when in **CPL Pricing** revision, if the *Act Fee Tax* field is left empty, then following message will appear:

The screenshot displays the Stewart Access software interface. At the top, there is a navigation bar with 'Stewart Access' and various menu items like 'File', 'Express', 'CPL', 'Jacket', 'Post Policy Endorsement', 'Register', 'Contact', and 'Help'. Below this, there are search and filter fields for Agency, File Number, State, and Location. The main content area is divided into sections: 'CPL', 'Jacket', 'Property Type', 'Buyer/Borrower', 'Seller', and 'Lender'. An error dialog box is overlaid on the 'Jacket' section, with the message: 'Error' followed by a bullet point: 'CPL Charges: Act Fee Tax is required'. The dialog box has an 'OK' button at the bottom right. In the background, the 'CPL' table shows a row with 'Act Fee Tax' set to '\$' (empty), and the 'Lender' section shows 'Legal Name' as 'Huntington National Bank, The' and 'Mailing Address' as '300 Elm St'.

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.