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Stewart Access Upgrade Guide

This guide was developed for ASMs, ASRs and their agents as they to prepare for Stewart Access.
Upgrade Process Overview

Review this guide with your Agent and discuss what is changing with Stewart Access and how they may need to make changes in their current CPL and Policy operations. Additionally, determine if any additional steps are required for your Agent’s TPS, as shown in the last part of this guide.

Once ready, you or your agent will submit a formal request to begin the upgrade to Stewart Access.

Your agent can add, change, or deactivate CPL and/or Jacket users as part of this request. If agents need to see a current list of users, they can request one from stewartaccessdeploymentteam@stewart.com.

After the Stewart Deployment team processes the request your agent will receive an email from Stewart (with a CC to you) containing the upgrade go live date, typically 7-10 business days after the request is submitted.

On the upgrade go live date your agent can begin using Stewart Access.

Your agents still have access to their existing legacy inventory (i.e. STEPS) for one month following your upgrade date.

Additional transition time can be granted if needed, though it is expected that ASMs/ASRs will have planned for the standard 1-month transition time before beginning the upgrade.
What’s Changing with Stewart Access

In addition to visiting the Stewart Access Training Center, the topics below highlight some of the key changes with Stewart Access and should be reviewed by ASMs/ASRs and their Agents before beginning the upgrade process.

Automatic Transmittal of Jackets

For all Stewart Access users, except those using AIM+, Policy Jacket data is automatically transmitted to Stewart and there is no separate “transmittal” action needed from the agent.

Jacket and CPL data is transmitted to Stewart and recorded in an agent’s account three days following the policy date entered by the agent. It is important to note that this information will be the primary source of record for the policy; images submitted later are used only for archival purposes. For this reason it is important to ensure the data entered when issuing a policy is as accurate as possible. See below for a summary of the CPL and Jacket submitting timeline.

*Stewart Access integration will not impact the way AIM+ users transmit policies to Stewart.

Remitting Payment

When remitting payments it is essential that Agents indicate the amount to be applied to each file.

There are two ways this can be done:

- Submit separate checks for each file, with a file number written on the check.
- Submit one check for multiple files, along with an accompanying Register Report showing the amount to apply to each file. If remitting via wire payment, a register report must also be submitted by email. The register report should cover the full amount of the check or wire payment.

A register report is available from the Stewart Access web portal, or agents can use a report generated from their own TPS so long as it clearly indicates payment amounts for each file.

See the Policy Remittance Information under Self-Paced Learning on the Stewart Access Training Center for more information.
Submitting Images and Schedules
The two preferred methods for submitting policy images and schedules are not changing:

- **Mail** (including digital media such as CDs)
  - Use preprinted envelopes available from your ASM
  - Additional envelopes can also be ordered from Customer Care
- **FTP**
  - If not already setup to submit to Stewart’s FTP site please contact Customer Care
  - Preferred file format is PDF
  - Each policy should be saved as a separate image, named with the policy number
  - Policies should be submitted in the existing agency folder; do not create new folders on the FTP site
  - Images should be in portrait not landscape
  - Policies need to be in the correct order, i.e. Schedule A followed by Schedule B, etc. then endorsements

Endorsements
Endorsement information is not currently required when pulling a policy jacket from a Stewart Access integrated TPS, except on Short Form Loan Policies and Texas Policies.

Agents are still responsible for including all endorsement details and copies when reporting the full policy to Stewart.

Policy Serial Numbers
Policy serial numbers will no longer contain prefixes that identify form type.

Transaction Codes
Transaction codes must now be included on all policies and endorsements.

Commitments
Commitment functionality is not yet available with Stewart Access TPS integrations. See Commitments when using an Integration in the Tips and Tricks section of the Stewart Access Training Center.
Frequently Asked Questions

What if an Agent finds that Stewart Access won’t work for them after the upgrade?
It is possible to extend the Stewart Access transition period if Stewart Access has limitations that will prevent an agent from completing polices or CPLs. Agents should work with their ASM/ASR to discuss the specific issue, and the ASM/ASR will be able to determine how best to resolve the issue and if it is necessary to request a extension or rollback from Stewart.

Can an ASM do an upgrade for an Agent?
Yes, however the ASM should still thoroughly review what will be changing with their agent and provide Stewart with a clear point of contact to receive important announcements throughout the transition and decommissioning process.

I've never had to use Transaction codes before, why are they required now?
Transaction codes have always been required by Stewart, and by regulatory bodies in some states. In the past, because of the way policies were processed, there was an opportunity for Stewart Policy Services to manually add in missing transaction codes. As Stewart works to upgrade, and speed up its policy processing operations, these manual additions will no longer be feasible. Additionally, having transaction codes entered directly by the issuing agent will greatly improve data quality. Expect future versions of Stewart Access to make entering transaction codes even easier.

Why is so much detail needed with payments now?
As part of the transition to Stewart Access, Stewart is also updating the way agent accounts are maintained. Payment detail is now tracked at the file level, allowing for much more accurate account reconciliations. To correctly match up payments and files Stewart needs to know how remittances should be applied to outstanding file changes.
Details for TPS/Web Portal

Web Portal

Upgrade Process Changes
• None

Additional Training
• Stewart Access Express (CPL and Jackets) [view the video](duration 21:52)
• Closing Protection Letter (CPL) [view the video](duration 17:44) and refer to the User Guide and Quick Reference Guide.
• Jackets [view the video](duration 26:10) and refer to the User Guide and Quick Reference Guide.

AccuTitle

Upgrade Process Changes
• AccuTitle System Administrator privileges are required to initially input your Stewart Access login credentials into TitleDesktop/Magram Online

Additional Training
• Closing Protection Letter (CPL) refer to the Quick Reference Guide provided by AccuTitle
• Jackets refer to the Quick Reference Guide provided by AccuTitle
• CPL and Jackets [view the video](duration 25:34) provided by AccuTitle/Stewart

AIM+

Upgrade Process Changes
• Note that Stewart Access User ID/Password will be the same as your TWP/AIM+ User ID/Password
• AIM+ inventory will be decommissioned after 8:00 p.m. Central the night before your go live date
• AIM+ inventory will be removed from your AIM+ database 1 week after go live date

Additional Training
• Closing Protection Letter (CPL) [view this video](duration 6:55) and reference the Quick Reference Guide.
• Jackets [view the video](duration 26:10) and refer to the Quick Reference Guide and Retrieve Policy Data

Displaysoft

Upgrade Process Changes
• None

Additional Training
• Closing Protection Letter (CPL) and Jackets refer to the DisplaySoft User Guide provided by DisplaySoft.
E-Closing

Upgrade Process Changes
• Users with Stewart Access login credentials must reconfirm, validate, and update connections prior to go live with Jackets.

Additional Training
• Closing Protection Letter (CPL) and Jackets refer to the E-Closing User Guide provided by E-Closing.

LandTech

Upgrade Process Changes
• LandTech Server Edition
  o Contact your LandTech Support Center to schedule upgrade
  o Provide your Stewart Access/LandTech go live date
• LandTech Cloud Edition
  o No LandTech upgrade required

Additional Training
• Closing Protection Letter (CPL) refer to the User guide provided by LandTech
• Jackets refer to the User Guide provided by LandTech
• Closing Protection Letter (CPL) and Jackets view the video (duration 37:44) provided by LandTech

Qualia

Upgrade Process Changes
• Qualia System Administrator privileges are required to initially input your Stewart Access login credentials into the Underwriter Menu under Integrated Underwriters

Additional Training
• Jackets and Closing Protection Letter (CPL) refer to the Qualia User Guide provided by Qualia

RamQuest

Upgrade Process Changes
• RamQuest Closing Market TPR (Trading Partner Relationship Agreement) is required to initiate the Stewart integration
  o Prior to 9/9/19, your existing TPR will be migrated to the new 2.x environment; no new TPR submission needed
  o After 9/10/19, request your TPR through Closing Market to activate the integration
  o Contact your RamQuest Support Center for assistance to submit

Additional Training
• Closing Protection Letter (CPL) and Jackets refer to the RamQuest User Guide.
ResWare

Upgrade Process Changes
• Contact your ResWare Support Center to verify your integration version and/or schedule upgrade
• Email Stewart Access Deployment Team with your ResWare upgrade date

Additional Training
• Closing Protection Letter (CPL) refer to the User Guide provided by ResWare.
• Jackets refer to the User Guide provided by ResWare.
• Closing Protection Letter (CPL) and Jackets view the video (duration 8:10) provided by ResWare

SnapClose

Upgrade Process Changes (SnapClose Server Edition)
• Contact your SnapClose Support Center to request and/or schedule upgrade if assistance is needed.
• Provide your Stewart Access/SnapClose Tech with go-live date.

Upgrade Process Changes (SnapClose Cloud Edition)
• No upgrade required.
• Activate Stewart in User Preferences with valid Stewart Credentials.

Additional Training
• Closing Protection Letter (CPL) and Jackets refer to the SnapClose User Guide.

Softpro

Upgrade Process Changes
• Access from the 360 Services Menu (Note: If unavailable contact your SoftPro Support Center).

Additional Training
• Closing Protection Letter (CPL) and Jackets refer to the SoftPro User Guide or view the video provided by SoftPro.

TrackerPro

Upgrade Process Changes
• None

Additional Training
• Jackets and Closing Protection Letter (CPL) refer to the TrackerPro User Guide provided by TrackerPro
• Contact TrackerPro Support Center
Turbo Title

Upgrade Process Changes
- Turbo Title Server Edition
  - Contact your Turbo Title Support Center to verify your integration version and/or schedule upgrade.
  - Provide your Stewart Access/Turbo Title go live date.

Additional Training
- Contact your Turbo Title Support Center for assistance.
- **Closing Protection Letter (CPL)** [view this video](#) (duration 3:49) provided by Turbo Title.
- **Jackets** [view this video](#) (duration 4:44) provided by Turbo Title.
**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 contact visit the Stewart Access Training Center.

**Technical Support**

For technical support, contact the Agency Support Center at 1.844.835.1200 or CustomerCare@stewart.com.