

# Stewart – Underwriter CPL & Policy Jackets

**Purpose:** This job aid demonstrates how to set up the Stewart Title Guaranty Company integration to generate and void policy jackets and closing protection letters from within ResWare. When this integration is used, the documents are attached to a file without a user having to go to the underwriter’s website.

A user guide for this integration may be found on the customer portal at [Stewart Title Guaranty Company: CPL & jackets](#).

Note: Contact a Stewart Title representative to register and receive login credentials. Contact Adeptive support to verify the config file settings, then complete the steps in this job aid.

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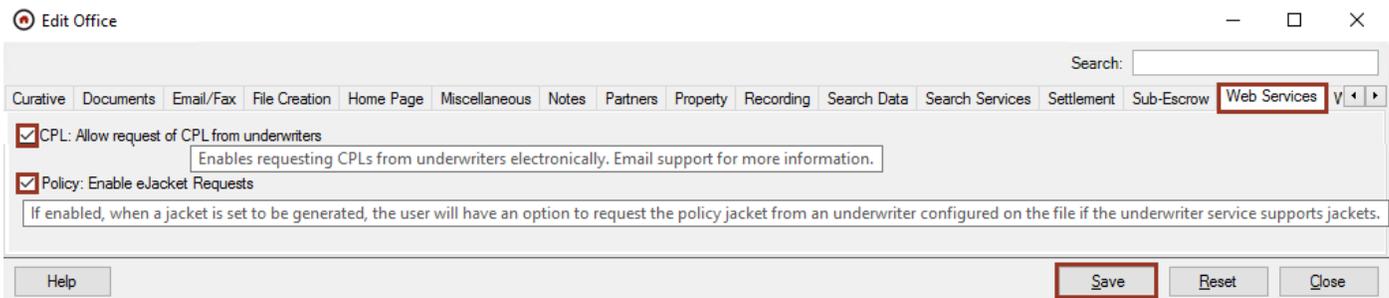
## Version History

Version	Date	Mantis	Description
8.17.2	6/24/2016	12552	Request and void CPLs
8.21.4		12556	Request jackets
8.21.18	3/6/2017	14543	Void jackets
8.21.18	3/6/2017	14659	Upgrade to Stewart v 1.8
8.21.25	4/12/2017	14826	Support metes and bounds, get original policy, make successor language optional for Stewart Jackets
9.10.6	7/10/2020	20951	Upgrade to Stewart v2.5 CPL: - Allow search and select for secondary companies Jackets: - Add short form fields - Add Stewart questions

## Enabling the office options

### Admin/General Setup/Offices/Web Services

- Enable *CPL*: Allow request of CPL from underwriters to allow requesting CPLs.
- Enable *Policy*: Enable eJacket Requests to allow requesting jackets.



The screenshot shows the 'Edit Office' window with the 'Web Services' tab selected. The 'CPL: Allow request of CPL from underwriters' checkbox is checked, with a tooltip that reads 'Enables requesting CPLs from underwriters electronically. Email support for more information.' The 'Policy: Enable eJacket Requests' checkbox is also checked, with a tooltip that reads 'If enabled, when a jacket is set to be generated, the user will have an option to request the policy jacket from an underwriter configured on the file if the underwriter service supports jackets.' The 'Save' button is highlighted with a red box.

## Setting up the underwriter partner

To add an underwriter partner, complete the setup in the *Adding an Underwriter Partner* [job aid](#).

### Selecting the underwriter service

#### Admin\Partners>Edit Partner\Underwriter\Miscellaneous

- Set the **Underwriter Service** to *Stewart*.
- Set the **CPL Document Type** to *CPL* if the CPL integration will be used.
- Set the **Lender Jacket Document Type** to *Loan Policy Jacket* if the jacket integration will be used.
- Set the **Owner Jacket Document Type** to *Owner Policy Jacket* if the jacket integration will be used.
- Click **Save**.

**Underwriter Data**

State Based | Title Premium Rates | **Miscellaneous**

Remittance  
 Remittance: Export Type:  Remittance: Use Wire:   
 Underwriter Prefix:

CPL/Jackets  
 Underwriter Service: **Stewart**  
 CPL Document Type: **CPL**  
 Lender Jacket Document Type: **Loan Policy Jacket**  
 Owner Jacket Document Type: **Owner Policy Jacket**

### Mapping jacket endorsements

To retrieve jacket endorsements, go to a file in each state in which the jacket integration will be used. The configured Stewart underwriter partner must be on the file. Go to the *Policy* tab and click on the **Generate** button to request a jacket. Log in to retrieve endorsement information for the state. After clicking **Login**, click on **Close**.

### Admin/Partners/Edit Partner/Underwriter/State-Based

- Select each state that will be used for the jacket integration.
- In the *Endorsements* section, select an endorsement and click on **Edit**, or double-click on the endorsement.
- Select a **Stewart Endorsement Mapping** at the bottom of the endorsement panel.

**Edit Underwriter Endorsement**

Enabled  Do Not Generate On Short Form Policy  Endorsement Added Trigger

**Name:** ALTA 8.1-06 Environmental Protection Lien

**Applies to Policy:** Lender's  Allow Multiple  Allow website user to enter custom fields

Special Endorsement:   Require all custom fields on website

Stat Code:  Fee:

Stewart Endorsement Mapping: **ALTA 8.1-06 Environmental Protection Lien Rev 6-17-2006**  Show All Endorsements

Help



## Lender CPL addresses

### Admin/Partners/Edit Lender/Lender

- If a lender's address on the CPL documents needs to be different than the lender's address, click on the **Lender** option in the *Edit Partner* panel and complete the *CPL Address Override* information with the address that should appear on the CPL. Users will be able to toggle between the override address and the partner address.
- Click **Save, Save**.

The screenshot shows the 'Edit Partner' window with the 'Partner' tab selected. The 'Partner Types' list on the left includes 'Client', 'Lender', and 'Payoff Lender'. The 'Lender...' button is highlighted with a red box. A red arrow points from this button to the 'Lender Data' dialog box. The dialog box is titled 'Lender Data' and contains a 'CPL Address Override' section with the following fields: Street Address 1 (A Division of American Banks), Street Address 2 (111 5th Avenue), City (New York), State (NY), Zip (10001), Phone ((800) 555-1115 x), Fax, and Email (ficus@americanb.com). The 'Save' button in the dialog is also highlighted with a red box. The main window shows the 'Ficus Bank' partner details, including contact information, address (4321 Randon Boulevard), and various settings like 'Enabled' and 'Approved'.