



Stewart Title Guaranty Company® Integration

TitleExpress Version 9.6

This document contains instructions to setup and use the Stewart Integration with TitleExpress®. This integration is designed to provide TitleExpress users with the ability to create, update/revise and void CPL and Jackets without leaving the TitleExpress application.

Release Date: August 2021



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1 Executive Summary

The TitleExpress integration with Stewart Title Guaranty Company (Stewart, STGC) allows users to request and generate approved Closing Protection Letters (CPLs) and Policy Jackets without having to navigate to their website.

Stewart agents using TitleExpress can now request, update and void CPL and policy jackets within TitleExpress minimizing keystrokes and potential data discrepancies as well as the elimination of working across multiple platforms.

2 TitleExpress System Management Setup

To begin using the Stewart Title integration configuration changes are needed in System Management.

2.1 Users Tab

User with Admin rights can assign specific permissions to each of the user depending on their roles in the organization.

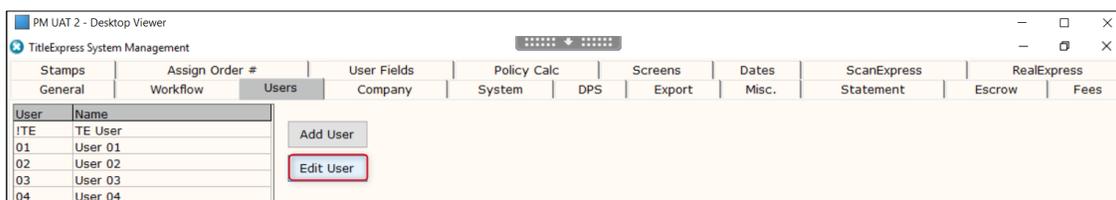
To do this, follow these steps in the System Management utility:

1. Log in to TitleExpress at the system management terminal (00) with your User ID and Password.

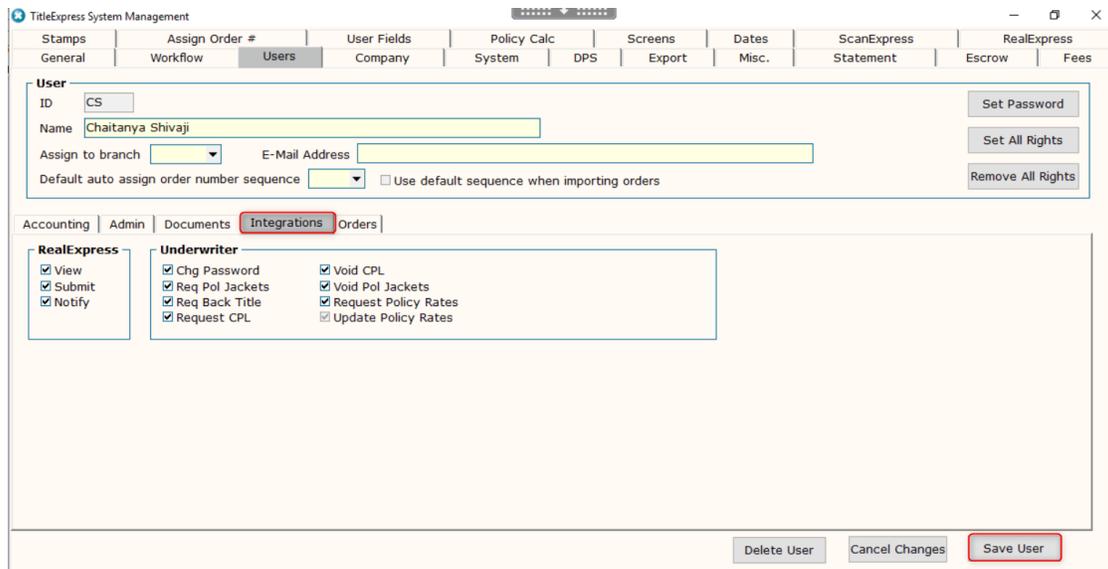


The screenshot shows a 'Password Entry' dialog box with the TitleExpress logo at the top. Below the logo, there are three input fields: 'Connect To' with a dropdown menu set to 'Local', 'User ID' with the text 'NEW' entered, and 'Password' which is currently empty. At the bottom of the dialog, there are three buttons: 'Setup', 'Cancel', and 'OK'.

2. Click **System Management** on the TitleExpress home page.
3. Click on the **Users** tab
4. Select the user from the list and click **Edit User**



5. Select the **Integrations** tab
6. Select rights for the user

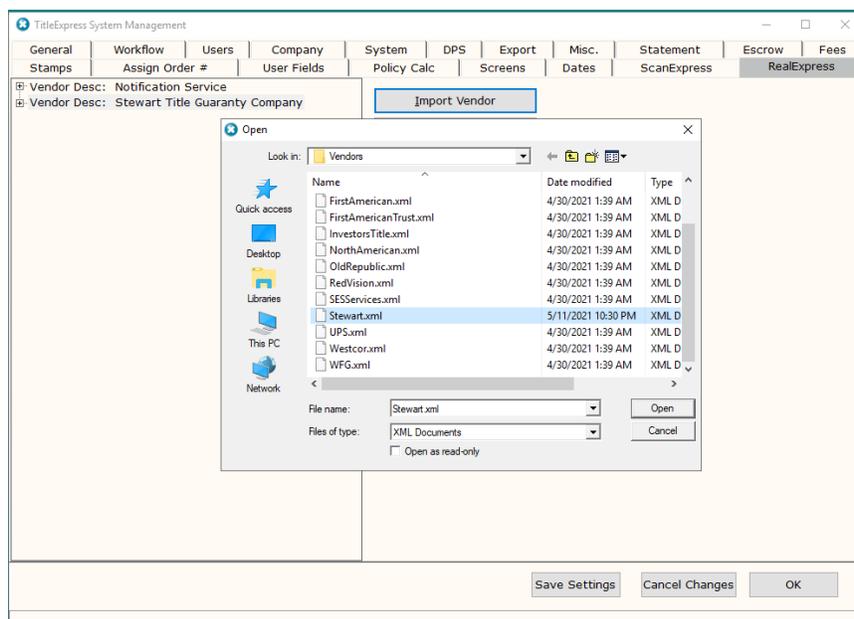


The screenshot shows the 'User' configuration page in TitleExpress System Management. The 'Users' tab is selected. The user's name is 'Chaitanya Shivaji'. The 'Integrations' tab is highlighted in red. Under the 'RealExpress' section, the following options are checked: View, Submit, and Notify. Under the 'Underwriter' section, the following options are checked: Chg Password, Req Pol Jackets, Request CPL, Void CPL, Void Pol Jackets, Request Policy Rates, and Update Policy Rates. The 'Save User' button is highlighted in red.

7. Click **Save User** to save the changes

2.2 RealExpress tab

1. Click on the **RealExpress** Tab.
2. Click the **Import Vendor** button.
3. Choose the **Stewart.xml** file and click **Open**.



4. Click **OK** at the message indicating that the vendor specification has been imported successfully.
5. Click **Save Settings**, then click **OK** to exit System Management.
6. Exit **TitleExpress** completely.

2.3 Policy Cal tab

The Stewart Integration must be refreshed after any changes are made to your coverage area, endorsements, policies, branches or password changes. By refreshing the underwriter, the changes will be retrieved from STGC and loaded into TitleExpress.

To do this, follow these steps in the System Management utility:

1. Select the **Policy Calc** tab
2. Select **Stewart Title Guaranty Company** from the **E-Jacket Data Refresh** dropdown
3. Click **Refresh Underwriter Information**
4. Click **OK** after the configuration has been updated

The screenshot shows the 'TitleExpress System Management' interface with the 'Policy Calc' tab selected. The interface includes a navigation menu with tabs: General, Workflow, Users, Company, System, and DPS. Below the menu, there are sub-tabs: Stamps, Assign Order #, User Fields, and Policy Calc. The main content area is divided into three sections:

- Tables:** Contains a dropdown menu for 'Underwriter Table' and two buttons: 'Edit Underwriter Table' and 'Create Underwriter Table'.
- Order Selection Criteria:** Includes a checked checkbox for 'Only display tables that match the Policy tab, HUD-1 Payto code', a text instruction 'You must update underwriter tables after editing or creating new tables.', and an 'Update Underwriter Tables' button.
- E-Jacket Data Refresh:** Features a dropdown menu for 'Select Underwriter to Refresh' with 'Stewart Title Guaranty Company' selected, and a 'Refresh Underwriter Information' button. This section is highlighted with a red border.

3 Order Entry

Below are the fields to complete in your order.

If a required field is missing when a request for a CPL or policy jacket is made, a warning message displays that the field must be complete before continuing with your request.

- Order Tab: Order Type (Buy/Sell, Refinance, Cash, Seller Financed)
- Order Tab: Settlement Date (for order type Buy/Sell, Refinance, Cash, Seller Financed)
- Order Tab: Sales Price (for order type Buy/Sell, Cash, Seller Financed)
- Order Tab: Loan Amount (for order type Buy/Sell, Refinance, Seller Financed)
- Parties Tab: Applicable Parties (Borrower/Seller), Party Type (all order types)
- Property Tab: Property Address, City, State and Zip Code (all order types)
- Property Tab: Reporting Property Type (all order types)
- Lenders Tab: Lender Name, Lender Address and Loan Number (Buy/Sell, Refinance)
- Lenders Tab: Insured Language (Buy/Sell, Refinance)
- Policy Tab: Underwriter Table (all order types)

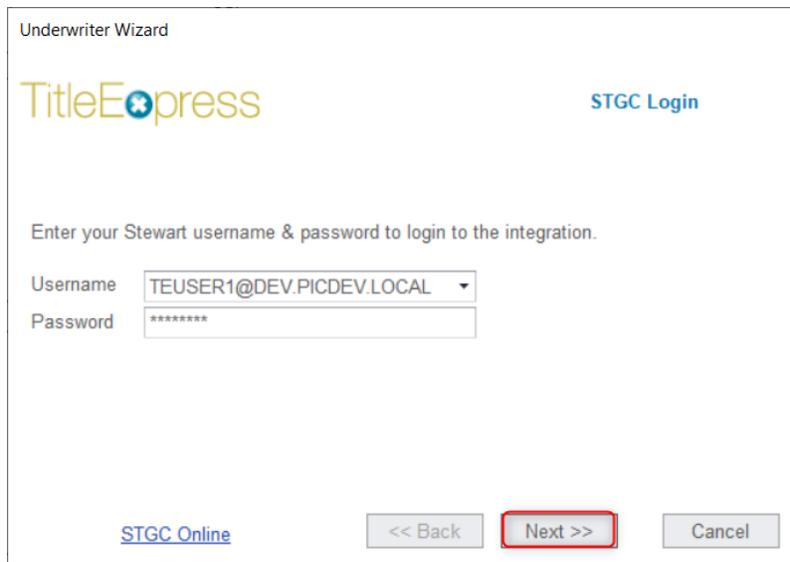
*The Lender, Investor, Servicer, or Assignment is used for the CPL and jacket based on the selection for the **Send Policy To** option. Displays after the lender name on **CPLs only**.*

4 Accessing the STGC Integration

Clicking the **Request** button on the Policy, Data tab opens the Underwriter Wizard. This wizard allows you to request services (i.e., policy jackets and CPLs) from Stewart.

4.1 Login

The first time you access the Underwriter Wizard you are prompted to enter your Stewart login credentials. Your login credentials will be stored until a refresh of the Stewart Title Guaranty Company Underwriter Information occurs in System Management. After a refresh, you will need to re-enter your username and password.



The screenshot shows a web form titled "Underwriter Wizard" with the "TitleExpress" logo and "STGC Login" text. Below the logo is the instruction "Enter your Stewart username & password to login to the integration." There are two input fields: "Username" with a dropdown menu showing "TEUSER1@DEV.PICDEV.LOCAL" and "Password" with a masked field of seven asterisks. At the bottom, there are four buttons: "STGC Online" (a link), "<< Back", "Next >>" (highlighted with a red border), and "Cancel".

5 Closing Protection Letter

5.1 Request a Closing Protection Letter

Requesting a Closing Protection Letter through the integration creates a CPL in the STGC portal, adds the CPL Number to the Number field of the Policy, Closing Service Letter section in TitleExpress and saves a PDF of your CPL to Document Manager.

The windows that displays when requesting a CPL may vary based on the property's state.

To request a CPL, follow these steps:

1. Select the **Agency** and Location from the list and click **Next**

Underwriter Wizard

TitleExpress Underwriter Selection

Select the Agency and Location:

Agency Name	Location
StewartAccess Int Test 2n	StewartAccess Int Test 2nd agency - 1360 Po
StewartAccess Test Agency	StewartAccess Test Agency Inc - 1980 Post C
StewartAccess Test Agency	SA Test Agency with 100 characters in the Le
StewartAccess Test Agency	StewartAccess Test Agency Inc - 788 W Sam

Logged In: TEUSER1@DEV.PICDEV.LOCAL | [Change User](#)

[STGC Online](#) << Back **Next >>** Cancel

2. Select the **Branch** and click **Next**

Underwriter Wizard

TitleExpress Underwriter Branch Selection

Select the Branch:

Branch Name
None
Include All Branches

Logged In: TEUSER1@DEV.PICDEV.LOCAL | [Change User](#)

[STGC Online](#) << Back **Next >>** Cancel

3. Select **Closing Protection Letter: Request New** in the Request Services window and click **Next**.

Underwriter Wizard

TitleExpress Request Services

Select services to request from the underwriter:

Service
<input checked="" type="checkbox"/> Closing Protection Letter: Request New
<input type="checkbox"/> Policy Jacket: Request New

Logged In: TEUSER1@DEV.PICDEV.LOCAL | [Change User](#)

[STGC Online](#) << Back **Next >>** Cancel

4. Select the parties to cover and click **Next**

Underwriter Wizard

TitleExpress Request Closing Protection

Select the parties to cover (at least one party must be selected):

Type	Name(s)
<input checked="" type="checkbox"/> Lender	Bank Of America
<input checked="" type="checkbox"/> Buyer/Borrower	Charles Pearson

STGC Online << Back **Next >>** Cancel

5. Select an **Additional Party**, if applicable, and Click **Next**.

The option to select an Approved Attorney, Secondary Agency, or Settlement Company will be displayed and enabled if available. If an additional party is not available, the selection will be disabled.

Underwriter Wizard

TitleExpress Request Closing Protection Letter

Select Additional Party:

None
 Approved Attorney
 Secondary Agency
 Settlement Company

Some of the options are not available for selection as additional parties were not returned by the Underwriter. Contact your underwriter for more information.

STGC Online << Back **Next >>** Cancel

6. If applicable, select **Additional Party** and click **Next**.

Underwriter Wizard

TitleExpress Request Closing Protection Letter

Select the Secondary Agency:

Name State **FL** Search

Name	Address
<input checked="" type="radio"/> First International Title, Inc.	411 W. Gregory Street, Pensa
<input type="radio"/> Primary Title Services, Inc.	260 Palermo Avenue, Suite 10
<input type="radio"/> Aces Title Agency, LLC	515 E. Las Olas Blvd., Suite 4
<input type="radio"/> Alpha Reliable Title, Inc	5401 S. Kirkman Road, Suite
<input type="radio"/> Anchor Title & Escrow, LLC	1331 Creighton Rd, Suite D, F
<input type="radio"/> Balch & Bingham, LLP	841 Prudential Drive, Suite 14
<input type="radio"/> Best Practices Title, LLC	2100 Ponce De Leon Blvd, Su
<input type="radio"/> Beta Abstract of Florida, Inc.	7000 W. Palmetto Park Road

[STGC Online](#) << Back **Next >>** Cancel

7. Select the options for your CPL and click **Next**

Underwriter Wizard

TitleExpress Request Closing Protection

Change lender information

Lender Name

Lender Address Line 1

Lender Address Line 2

City, State ZIP

Lender Successor Language *

CPL Effective Date

[STGC Online](#) << Back **Next >>** Cancel

Changes made to the lender name and address will not write back to TitleExpress, however, the Lender Language will.

The CPL Effective must be within seven (7) days or today's date.

- Click **Finish** to save the CPL documents with your order and update the CPL Number field

Underwriter Wizard

TitleExpress Request Closing Protection

Click Finish to save the files with your TitleExpress order.

View	Covered Party	Document Name
	Lender	CPL_L_584424691_20210527
	Buyer/Borrower	CPL_B_584413477_20210527

Open files to view **Finish**

21-0008

Order | Notes | Events | Parties | Property | Lenders | Payoffs | New Loan | **Policy** | Closing Disclosure | Disbursement | Other

Summary | **Data** | Policy Calculate | Endorsements | Misc./CPL | Final

Closing Service Letter

Number Request

Commitment

Number Date Time

Lender's Amount Owner's Amount

Lender's Policy

Policy Number Date Reported Distribution Report Code Request

Prior Policy Number Date Underwriter

Report Desc Display Desc

Owner's Policy

Policy Number Date Reported Distribution Report Code Request

Prior Policy Number Date Underwriter

Report Desc Display Desc

View History

Document Preparation Save

*Documents are accessed in the Document Manager. Click the **View** button or select the **Open files to view** option to open the PDF documents once the Wizard closes.*

5.2 Revise/Update a Closing Protection Letter

If you have requested a CPL, the Update option displays for CPLs that have not been voided. Updating a CPL voids the existing CPL in both your order and Stewart's CPL system, saves a new CPL PDF document with

your TitleExpress order and updates the Number field in the Closing Service Letter section on the Policy, Data tab.

To update a CPL, follow these steps:

1. Select **Closing Protection Letter: Update** in the Request Services window and click **Next**.

Underwriter Wizard

TitleExpress Request Services

Select services to request from the underwriter:

Service
<input type="checkbox"/> Closing Protection Letter: Request New
<input checked="" type="checkbox"/> Closing Protection Letter: Update
<input type="checkbox"/> Closing Protection Letter: Void
<input type="checkbox"/> Policy Jacket: Request New

Logged In: TEUSER1@DEV.PICDEV.LOCAL | [Change User](#)

[STGC Online](#) << Back **Next >>** Cancel

2. Select the **CPL** to update and click **Next**

Underwriter Wizard

TitleExpress Update Policy Jacket

Select the Closing Protection Letter to update:

Covered Party	Name
<input checked="" type="radio"/> Lender	CPL_L_590019774_20210621
<input type="radio"/> Buyer/Borrower	CPL_B_590020947_20210621

[STGC Online](#) << Back **Next >>** Cancel

3. Select an **Additional Party**, if applicable, and Click **Next**.

The option to select an Approved Attorney, Secondary Agency, or Settlement Company will be displayed and enabled if available. If an additional party is not available, the selection will be disabled.

The screenshot shows the 'Underwriter Wizard' window with the TitleEpress logo and the text 'Request Closing Protection Letter'. Below the logo, it says 'Select Additional Party:'. There are four radio button options: 'None', 'Approved Attorney', 'Secondary Agency' (which is selected), and 'Settlement Company'. A blue message box states: 'Some of the options are not available for selection as additional parties were not returned by the Underwriter. Contact your underwriter for more information.' At the bottom, there is a 'STGC Online' link, a '<< Back' button, a 'Next >>' button, and a 'Cancel' button.

4. If applicable, select **Additional Party** and click **Next**.

The screenshot shows the 'Underwriter Wizard' window with the TitleEpress logo and the text 'Request Closing Protection Letter'. Below the logo, it says 'Select the Secondary Agency:'. There is a search form with 'Name' and 'State' (set to 'FL') fields and a 'Search' button. Below the search form is a table of agencies:

Name	Address
<input checked="" type="radio"/> First International Title, Inc.	411 W. Gregory Street, Pens...
<input type="radio"/> Clark, Partington, Hart, Larry, Bond & S...	106 E. College Ave., Suite 60
<input type="radio"/> Clark, Partington, Hart, Larry, Bond & S...	1414 County Hwy 283 South,
<input type="radio"/> Primary Title Services, Inc.	260 Palermo Avenue, Suite 16
<input type="radio"/> Aces Title Agency, LLC	515 E. Las Olas Blvd., Suite 4
<input type="radio"/> Alpha Reliable Title, Inc	5401 S. Kirkman Road, Suite
<input type="radio"/> Anchor Title & Escrow, LLC	1331 Creighton Rd, Suite D, F
<input type="radio"/> Balch & Bingham, LLP	841 Prudential Drive, Suite 14

At the bottom, there is a 'STGC Online' link, a '<< Back' button, a 'Next >>' button, and a 'Cancel' button.

5. Select the options for your CPL and click **Next**

Underwriter Wizard

TitleExpress Request Closing Protection

Change lender information

Lender Name Bank Of America

Lender Address Line 1 940 Mayflower Ave.

Lender Address Line 2

City, State ZIP New York, NY 10001

Lender Successor Language * And/or The Secretary of Housing and Urba... ▾

CPL Effective Date 06/22/2021

[STGC Online](#) << Back Next >> Cancel

6. Click **Finish** to save the CPL documents with your order and update the CPL Number field in Policy tab.

Underwriter Wizard

TitleExpress Request Closing Protection

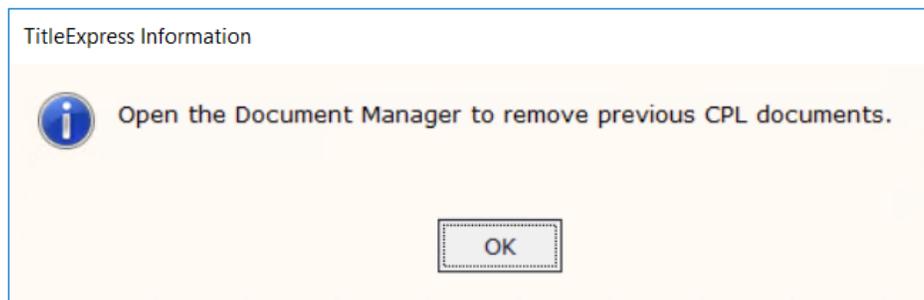
Click Finish to save the files with your TitleExpress order.

View	Covered Party	Document Name
	Lender	CPL_L_590230467_20210622

Open files to view

Finish

- Click OK to the notification message regarding removal of the previous CPL document from the Document Manager.

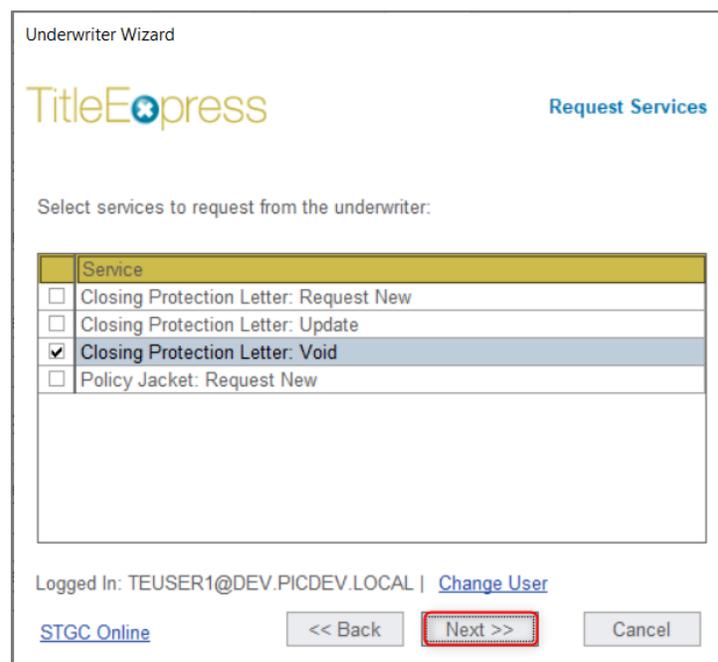


5.3 Void a Closing Protection Letter

If you have requested a CPL, the Void option displays for CPLs. This process voids the CPL in Stewart Title's CPL system and removes the entry in the CPL Number from the Closing Service Letter section of the Policy, Data tab field in your TitleExpress order. The CPL document must manually be deleted in the Document Manager.

To void a Closing Protection Letter, follow these steps:

- Click the **Request** button in the Policy, Data tab.
- Select **Closing Protection Letter: Void** in the list of services and click **Next**



The screenshot shows the "Underwriter Wizard" interface. At the top, it says "Underwriter Wizard" and "TitleExpress" with a "Request Services" link. Below that, it says "Select services to request from the underwriter:". There is a table with the following services:

Service
<input type="checkbox"/> Closing Protection Letter: Request New
<input type="checkbox"/> Closing Protection Letter: Update
<input checked="" type="checkbox"/> Closing Protection Letter: Void
<input type="checkbox"/> Policy Jacket: Request New

At the bottom, it says "Logged In: TEUSER1@DEV.PICDEV.LOCAL | [Change User](#)". There are three buttons: "STGC Online", "<< Back", and "Next >>" (highlighted with a red box), and "Cancel".

- Select the Closing Protection Letter(s) to void, with the void reason from the drop-down list and click **Next**

Underwriter Wizard

TitleExpress Void Closing Protection Letter

Select the Closing Protection Letter(s) to void and then click Next:

	Name	Type	Void Reason*
<input checked="" type="checkbox"/>	CPL_L_584424691_...	Lender	Coverage Declined
<input type="checkbox"/>	CPL_B_584413477_...	Buyer/Borrower	Select Void Reason

Logged In: TEUSER1@DEV.PICDEV.LOCAL | [Change User](#)

[STGC Online](#) << Back **Next >>** Cancel

Note the covered party and document number so you can delete the corresponding PDF in the Document Manager.

4. Click **OK** to the notification message regarding removal of the voided CPL document from the Document Manager.

TitleExpress Information

 The selected Closing Protection Letters have been voided. Voided documents are not removed. Open the Document Manager to remove these documents.

OK

5. Click **Documents** on the Order tab.
6. Select the voided CPL document and click **Delete**.

6 Policy Jacket

6.1 Request a Policy Jacket

Requesting a policy jacket generates the jacket in STGC, saves the policy jacket PDF with the TitleExpress order, and updates the Number field in the Lender's Policy or Owner's Policy section on the Policy, Data tab.

The windows that display when requesting a jacket vary based on the property's state.

To request a policy jacket, follow these steps:

1. Select **Policy Jacket: Request New** in the Request Services window and click **Next**.

Underwriter Wizard

TitleExpress [Request Services](#)

Select services to request from the underwriter:

	Service
<input type="checkbox"/>	Closing Protection Letter: Request New
<input checked="" type="checkbox"/>	Policy Jacket: Request New

Logged In: TEUSER1@DEV.PICDEV.LOCAL | [Change User](#)

[STGC Online](#) << Back Next >> Cancel

2. Select the policy jacket type and click **Next**.

Underwriter Wizard

TitleE^opress Request Policy Jacket

Select the policy jacket type:

Lender
 Owner
 Commitment
 Simultaneous Lender and Owner

[STGC Online](#) << Back Next >> Cancel

3. Select the policy jacket and click **Next**.

Underwriter Wizard

TitleE^opress Request Policy Jacket

Select the policy jacket:

Policy Jacket
<input checked="" type="radio"/> ALTA Short Form Residential Loan Policy - FL - 6-17-2006
<input type="radio"/> ALTA Loan Policy - FL - 6-17-2006
<input type="radio"/> ALTA Residential Limited Coverage Mortgage Modification Policy 12-1-2014

[STGC Online](#) << Back Next >> Cancel

4. If **Short Form Residential Loan Policy** is chosen, select any associated **endorsements** and click **Next**.

Underwriter Wizard

TitleExpress Request Policy Jacket

Select the endorsements:

Endorsement
<input checked="" type="checkbox"/> ALTA 14-06 Future Advance - Priority - FL - Rev 12-1-2013
<input type="checkbox"/> ALTA 14.3-06 Future Advance - Reverse Mortgage - FL - Rev 12-1-2013
<input type="checkbox"/> ALTA 4.1-06 Condominium - FL - Rev 6-17-2006
<input type="checkbox"/> ALTA 5.1-06 Planned Unit Development - FL - Rev 6-17-2006
<input type="checkbox"/> ALTA 6-06 Variable Rate Mortgage - FL - Rev 6-17-2006
<input type="checkbox"/> ALTA 6.2-06 Variable Rate Mortgage - Negative Amort - FL - Rev 6-17-2006
<input type="checkbox"/> ALTA 7-06 Manufacturing Housing Unit - FL - Rev 6-17-2006
<input type="checkbox"/> ALTA 8.1-06 Environmental Protection Lien - FL - 6-17-2006
<input type="checkbox"/> ALTA 9-06 Restrictions, Encroachments, Minerals - FL - 12-1-2013

[STGC Online](#) << Back Next >> Cancel

5. Enter additional information to display on the jacket and click **Next**.

Underwriter Wizard

TitleExpress Additional Information

Enter the information to display on the Lender jacket.
(fields with an asterisk are required):

Lender Language

Addendum Attached Yes No

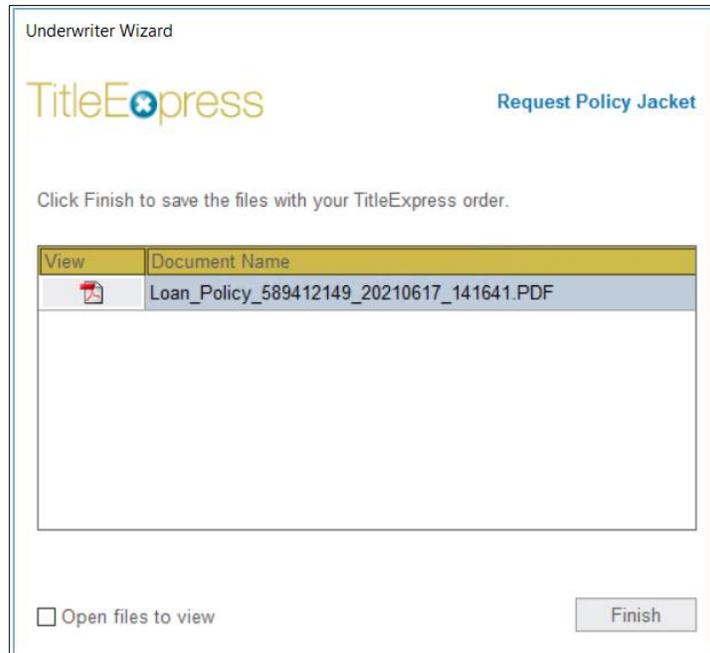
Mortgage Amount

Mortgage Date

State Statutes

[STGC Online](#) << Back **Next >>** Cancel

6. Click **Finish** to save the policy jacket document with your order and complete the Number field with the policy number.



*Documents are accessed in the **Document Manager**. Click the **View** button or select the **Open files to view** option to open the PDF documents once the Wizard closes.*

6.2 Revise/Update a Policy Jacket

If you have requested a policy jacket, the Update option displays for jackets that have not been voided. Updating a policy jacket voids the existing jacket in both your order and Stewart's system, saves a new jacket PDF document with your TitleExpress order and updates the Policy Number on the Policy, Data tab.

To update a policy jacket, follow these steps:

1. Select **Policy Jacket: Update** in the Request Services window and click **Next**.

Underwriter Wizard

TitleE^opress Request Services

Select services to request from the underwriter:

Service
<input type="checkbox"/> Closing Protection Letter: Request New
<input type="checkbox"/> Policy Jacket: Request New
<input checked="" type="checkbox"/> Policy Jacket: Update
<input type="checkbox"/> Policy Jacket: Void

Logged In: TEUSER1@DEV.PICDEV.LOCAL | [Change User](#)

[STGC Online](#) << Back **Next >>** Cancel

2. Select the Policy Jacket to **update** and click **Next**

Underwriter Wizard

TitleE^opress Update Policy Jacket

Select the policy jacket:

	Policy Number	Type	Policy Name
<input type="radio"/>	O-0000-589632261	Owner	ALTA U. S. Policy 12-3-2012
<input checked="" type="radio"/>	M-0000-589624761	Lender	ALTA Short Form Residential

[STGC Online](#) << Back **Next >>** Cancel

3. The additional information screen will be defaulted with the details entered previously while requesting new policy jacket. If required, these details can be updated and then click **Next**

Underwriter Wizard

TitleExpress Additional Information

Enter the information to display on the Lender jacket.
(fields with an asterisk are required):

Lender Language

Addendum Attached Yes No

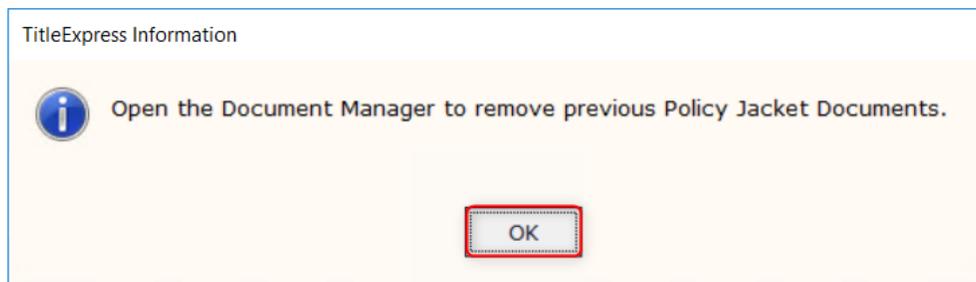
Mortgage Amount

Mortgage Date

State Statutes

[STGC Online](#)

4. Click OK to the notification message regarding removal of the previous policy jackets from the Document Manager.



6.3 Void a Policy Jacket

You can void a policy jacket that has been previously generated. Voiding a policy through the Underwriter Wizard voids the policy jacket in STGC, removes the Policy Number from Lender's Policy or Owner's policy section of the Policy, Data tab, and allows a new policy jacket to be generated.

1. Select **Policy Jacket: Void** in the Request Services window and click **Next**.

Underwriter Wizard

TitleExpress Request Services

Select services to request from the underwriter:

Service
<input type="checkbox"/> Closing Protection Letter: Request New
<input type="checkbox"/> Policy Jacket: Request New
<input type="checkbox"/> Policy Jacket: Update
<input checked="" type="checkbox"/> Policy Jacket: Void

Logged In: TEUSER1@DEV.PICDEV.LOCAL | [Change User](#)

[STGC Online](#) << Back **Next >>** Cancel

2. Select the policy jacket to void, the reason for void and click **Next**.

Underwriter Wizard

TitleExpress Void Policy Jacket

Select the jacket(s) to void, enter the reason for voiding, and then click Next.

Policy Number	Type	Void Reason*
<input checked="" type="checkbox"/> M-0000-589412149	Lender	Entered in Error
<input type="checkbox"/> O-0000-589632261	Owner	Select Void Reason

[STGC Online](#) << Back **Next >>** Cancel

3. Click OK to the notification message regarding removal of the previous policy jackets from the Document Manager.

TitleExpress Information



The selected Jackets have been voided. Voided documents are not removed. Open the Document Manager to remove these documents.

OK

7 View the Request History

You may review the Underwriter Wizard request history for an order by clicking the View History button on the Policy, Data tab. This information is useful to compare the order information to determine if changes were made to the order that require a new policy jacket or as an audit trail for underwriter requests.

The screenshot shows a web form titled "Owner's Policy". It contains several input fields and buttons. The fields are arranged in a grid-like structure:

- Policy Number: [Text Input]
- Date: [Text Input]
- Reported: [Text Input]
- Distribution: [Text Input]
- Report Code: [Dropdown Menu]
- Prior Policy Number: [Text Input]
- Date: [Text Input]
- Underwriter: [Text Input]
- Report Desc: [Text Input]
- Display Desc: [Text Input, containing "Title - Owner's Policy"]

Buttons include "Request" and "View History". A red arrow points to the "View History" button.

You may save this information to a text file by clicking **Save To File** or print a copy to a printer by clicking **Print**.

This window displays the wizard selections and order information at the time of the request including the following:

1. TitleExpress user that made the request.
2. Date and time a request was made
3. Underwriter Name
4. Policy Type (i.e., owners, lenders)
5. Agent ID
6. Agent Name
7. Requested Service (e.g., CPL, requesting a policy jacket)
8. Order Information

21-0008 Underwriter Request History

NEW 06/25/2021 at 4:07 PM

SELECTIONS

Underwriter: Stewart Title Guaranty Company
Policy Type: 0
Agent ID: 1-174A2H
Agent: StewartAccess Test Agency
Requested Service: Create CPL

ORDER INFORMATION

Settlement Date: 06/30/2021
Property: 79 White Oak Road, Hanover, PA 17331
Property Type: Residential
Loan Amount: \$354,500.00
Sales Price: \$375,000.00
Loan Number: 001654967897897
Lender: Wells Fargo
Address: 123 Lender Way, Panama City, FL 32405
Seller: Jennifer Morrison
Address: 79 White Oak Road, Westminster, MD 21157
TIN: 349987100
Buyer: Frederick L. Myers
Address: 158 Canon Creek, Baltimore, MD 21234

Print Save To File Close

SMS Customer Support

Our Support Team is dedicated to resolving your SMS software needs so that you can do the all-important job of growing your title and settlement business.

Our highly skilled analysts use state-of-the-art account support and IT solutions to handle your request quickly and consistently.

Our Support Team is dedicated to resolving your SMS software needs so that you can do the all-important job of growing your title and settlement business.

Our highly skilled analysts use state-of-the-art account support and IT solutions to handle your request quickly and consistently.

Hours of Operation

8:00 AM – 8:30 PM ET, Monday through Friday

Technical support provided during regular business hours and days is covered under the Software Services Subscription.

Phone - 800.767.7831

For urgent issues, please call our TitleExpress toll-free number to reach SMS Customer Support.

Email - TEsupport@smscorp.com

For non-urgent requests, drop us an email. One of our Support Analysts will respond to you within one business day.

Self-service

Search the [Document Library](#) for “how-to” instructions for installation, integrations, and many more hot topics.

Our [Video Library](#) provides step-by-step tutorials covering a variety of information, from quick two-minute tutorials to full-length training webinars.

Visit our [Blog](#) for the latest information on product releases, upgrades, and other important alerts. It is accessible from your TitleExpress application or our website.

Scheduled After-hours Support

After-hours technical support may be scheduled outside of regular business hours and days on weekdays, holidays, and weekends. Hourly fees apply.

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