



### Creating a Policy Jacket.

Log into TrackerPro as normal. This QRC assumes you have created a file in the system.

#### Steps

1. Click Add/Edit Transactions.

Title Index	3717474	12	Underwriter: St	ewart Title Insura	nce Company		REGULA	R
Applicant	Client	A		~		19	RUSH	
	Cust Ref. Salesman:	Sooker from Stok Stewri Title	65	5	LOGS: Fax / Email [] T	asks: 🚺 🗖	SUPER	RUSH
14415.44						TITLE APPLI	CATION DA	TES BY
Reports to						Order Date	4/5/2021	\$3
Debaup to						Due Date	4/23/202	1 N/A
						Read Date	-	
Add/Edit	123 180th Stre	et, New York NY 1	0165 (New York Co.	inty)		Typed Date		
Premises	Premises Type	Residential One I	Family Dwelling			Proofread Date		
	Survey inst.	NO SURVEY CO	VERAGE REQUIRED	· · · · ·		Perinted Date		
1000000000	Owneed \$50	00.000.00	Fee Simple		PREMIUMS	Preparate Classics	-	
Add/Edit	< 1 B3	00,000,00	ALTA Short Form R	esidential Loan Po	Owners Policy: \$2,033.00	Proj d. Closing	100000	
ransactions	-				Loan Policies: \$394.00	Sana Crosing		1 / 33
					Endorsements: \$150.00	Closed	-	
					and the second	Cancelled	On Hold	
						Alert	Special	Instructions
Address	Party	Name		- Internet	Service	Vendor ID	Ordered	Received .
Parties	OWNER	Samuel Stoke	15	ADG/EG	Underwinter Letters	stewNY	4/5/2021	4/5/2021
· Breeze	OUYER	Barry Booker		Tenoor	Underwriter Letters	stewNY	4/5/2021	4/5/2021
	LENDER	Wells Fargo 8	Bank, N.A.		Underwriter Letters	stewNY	4/5/2021	4/5/2021
					Underwriter Letters	stewNY	4/5/2021	4/5/2021
					Underwriter Letters	stewNY	4/5/2021	4/5/2021
					Underwriter Letters	STOWIN'Y	4/5/2021	4/5/2021

- 2. Click either **Owners Policy** or **Loan Policy** to add to file.
- 3. Add any Endorsements as needed.
- 4. Click Exit

Conners Policy       Son Policy         Aptions applicable to the Selected Policy:         Policy Amount         Solicy Premium(s)	Inte Policies: Dwners Policy \$500,000,00 Fe Joan Policy \$300,000,00 At	e Simple TA Short Form Res	\$2,033.0 \$394.00	0	Endorsements Standard Ne Environment Walver of Ar	w York En al Protec bitration	tion Lie Endors	\$0.00 \$50.00 \$50.00	3
ptions applicable to the Selected Policy: blicy Amount. blicy Amount. blicy Amount. blicy Amount. blicy Type author Amount. blicy Type author Amount. blicy Type blicy Note and covers extra property. Not Applicable amittance Code anable Amount (COMA New Money) atable Amou	Sources Policy States	Policy 🥑	•	+	*	1	×	+	٠
Velocy Amount     5300,000.00       Volicy Type     ALTA Short Form Resident/U       Volicy Type     ALTA Short Form Resident/U       Volicy Neae     S394.00       volicy Neae     S35.00       volicy Neae     S35.00       white Neae     S35.00       volicy Neae     S35.00       white States Apply     Not Applicable       Basing Service Letter ID     Wolice Remarks       wats Readed for Social States     Volice Remarks       Volice Remarks     Volice Remarks       volice Remarks     Volice Remarks	ptions applicable to the Selected Policy:			Options a	pplicable to the	Application	2		
Olicy Type     ALTA Short Form Residenci.v     S184.00       Olicy Premium (0)     S184.00       Olicy Premium (0)     S184.00       Olicy Premium (0)     S184.00       Total Endorsements     S180.00       Imo. Loan Covers extra property     Not Applicable       emittance Code     315       Statis Endorsements     S180.00	olicy Amount	\$300,000.00		Owners P	olicy Premium(s)		\$2,083	00	
Officy Premium     5394.00       Vicy Note     Not Applicable       Not Applicable     Vicy Note       aen Number     Vicy Note       Benitzance Code     Vicy Note       ansite code     Vicy Note       Assable Amount (CBMA New Money)     Vicy Note       Assable Amount (CBMA New Money)     Vicy Note       Assable Amount (CBMA New Money)     Vicy Note       Vicy Note Tax Aggregation     Vicy Note       Stating Stance     Orfawit (by Klective Date)       Vicy Note Tax Aggregation     Vicy Note       Vicy Note     Vicy Note <t< td=""><td>olicy Type</td><td>ALTA Short Form Re</td><td>sidentk 🗸</td><td>Loan Polis</td><td>cy Premium(s)</td><td></td><td>\$394.0</td><td>0</td><td></td></t<>	olicy Type	ALTA Short Form Re	sidentk 🗸	Loan Polis	cy Premium(s)		\$394.0	0	
Vier Nore     Not Applicable       Into. Loan covers extra property     Not Applicable       Jack Res Apply     Not Applicable       Being Service Letter ID     215       Resing Service Letter ID     Into Covers       Res Transfer Tax Options     Overset Menory       Res Transfer Tax Options     Into Covers       Res Transfer Tax Options     Into Covers       Res Transfer Tax Options     Into Covers	olicy Premium	\$394.00		Total End	orsements		\$150.0	0	
Inter Lean Covers extra property Nor Applicable  an Number  an Number  an Number  215  an Number  215  ant N	olicy Note			-					
ean Number i lemittance Code 235 Controst Vindeo of Option Prientum Divide Roding Service Letter ID Resting Service Letter ID	imo. Loan covers extra property	Not Applicable	9	Prior Inc.	rance for discour	their celex			_
Termitance Code     215     Little (IVVC Tax Aggregation)       Desing Service Cotteen Prentum Crede     IVvoice Remarks       Desing Service Letter ID     IVvoice Remarks       Stating Sance Actor ID     IVvoice Remarks       Taxable Amount (CDMA New Money)     IVvoice Remarks       Taxable Tax Options     Cefault (by (Mective Date))       Taxable Tax Color Mentral flor VVO     Default (by (Mective Date))       Taxable Tax Options     IVvoice Remarks       Taxable Tax Options     IVvoice Remarks	san Number			Buts Rates Apply			NOT Apportable		
Sontract Vandee of Option Prenklam Credits Soning Service Letter (O Sinable Annound (CIMA New Money)	lemittance Code	315	(v)	Edit NYC	ax Aggregation				
Desing Service Letter ID     Image: Control of COMM New Money)     Image: Control of COMM New Money)       Stating Balance     Image: Control of Comment     Image: Control of Comment       Averages Tax Options     Oeffault (by Effective Data)     Image: Control of Comment       Itaxe Transfer Tax Options     Oeffault (by Effective Data)     Image: Control of Comment       Itaxe Transfer Tax Options     Image: Control of Comment     Image: Control of Comment       Itaxe Transfer Tax Options     Image: Control of Comment     Image: Control of Comment			1997	Invoice R	emerite .		1		
Taxable Amount (CDMA New Money)	Dosing Service Letter 10						-		_
Disting Balance     Default       Wortgage Tax Optional     Default       With Transfer Tax Coltinues     Default Div Effective Data)       Taxes Transfer Tax Options     Default Div Effective Data)       accal Transfer Tax Options     Default Div Effective Data)	avable Amount (CEMA New Money)	7							
Mortgage Tax Options Outfault Options Options Option Tax Options Options Option Option Option Options Options Options Options Options Options Options Options	kisting Balance			8					
Inst Transfer Tax Options Confective Data Conf	Aortgage Tax Options	Defeuits	1						
Intara Transfar Tax Options III III III III III III III III III I	VIS Transfer Tax Calic. Mathod for NVC	Default (by Effective	e Date) 💷	3					
Itatis Special (Minister) Tax Options	trata Transfer Tax Options		100						
actal Transfer Tax Options	tate Special (Mansion) Tax Options		100						
	ocal Transfer Tax Options		24						_
				1200				_	
Rola Manual	Rote Manual						-		





5. Click **Title** button.

🔻 🕨 NY Training Demo 🛛 🚯 📰 🗐 🔯		
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6. Click Create EJacket.

stewart mue moura	ince Company			×	+	
fitle Policies:					+	
Owners Fee Simple Loan ALTA Short Form Re	5500,000.00				1	
					×	
					-	
Policy Details: Policy Number:	Issued De	rte: End. Issued:	Policy Date:		-	
					Rb.	
yped by:	Typed Da	te:				

 This screen begins the integration and is the first of two steps. The information needed for a jacket is pulled from the order to this screen. Make edits as needed. Click **Continue**.
 Stewart Table Elacket Step 1

Title Number	NY Training De	mo		Username asmtestuser4@dev.picdev.local	Password		Ed Sar
State	New York	Form Type	Loan				
gent	StewartAccess	Test Agency				<ul> <li>Defau</li> </ul>	lt .
orm	ALTA Short Fo	m Residential Loan Policy -	NY - 6-17-2006				~
Properties	123 180th Stre	et: New York, NY, 10165				Add	
						Remove	
	Prop Type	Residential - General		<u>.</u>			
	Address	123 180h Steet		Ť			
	Address2						
	City	New York	Cou	inty New York V State NY Z	P 10165		
	Section	Block Lo	t Subdiv.				
	Metes and Bo	unds County of New Yo	ork, State of New York	Parcel Identifier			
Parties	Seller	Samuel Stokes		123 180th Street; New York, NY,	10165	Add	
	Buyer/Borrowe	r Barry Booker		123 180th Street; New York, NY,	10165	Remove	
	Lender	Wells Fargo Bank, N	A.	7 St. Paul St.; Baltimore, MD, 2120	02		
					6		
	FirstName	Samuel	Middle Name	Last Name Stokes			
	Type Seller	<ul> <li>Entity/Indiv</li> </ul>	individual	<ul> <li>A second sec second second sec</li></ul>			
	Address	123 180th Street					
	City	New York		State NY 🗸 Zip	10165		
-						10 C 10 C 10 C	





8. In step 2, make any edits needed the populated information. The Endorsements are "mapped" between the two systems and all rates and fees are pulled here from the file and are reported to Stewart. Additional Short Form fields are populated on the right and may be edited.

#### 9. Click Download Now.

	StewartAccess Test Agency - 1980 P	ost Oak Suite 800	✓ Default		Signature MK	<ul> <li>Defau</li> </ul>
ability remium	\$300.000 00 Date \$394.00 Remittance	4/30/2021	Simultaneous	-	Form Details	Manaj
rans. Code	315-Issued Simultaneously with Fee P	olicy		~	Addendum Attached	Yes
	FromFile		From Stewart		Motgage Amount	\$300,000.0
ndorsements	Standard New York Endorsement Los	n	TIRSA Standard NY Endorsement	- Loan	Motgage Date	4/30/2021
	Environmental Protection Lien NYC E	ndorsement	TIRSA 8.1 EPL - New York City O	nly	Policy Time Stamp	8:00:00 AM
	Waiver of Arbitration Endorsement Lo	an	TIRSA Waiver of Abitration		Borrower Names and Vesting	Barry Books
	Endorsement Chosen TIRSA	Standard NY Endorsemen	- Loan		Value Yes	
efi/Reissue	Refinance / Reissue				-	
ddi. Ovarges				Remove		

10. The integration may retrun questions such as this one to verify the mapping of transaction codes. Make edits as needed and click **Continue**.

Stewart Title Additional Questions

EJacket - Stewart Title - Questions ar	nd Answers User Guide
Questionnaire / Endorsement Transaction Codes	
TIRSA Standard NY Endorsement - Loan	400-TIRSA Standard NY Endorsement - Loan
TIRSA 8.1 EPL - New York City Only	434-TIRSA 8.1 EPL (New York City Only)
TIRSA Waiver of Arbitration	430-Waiver of Arbitration Endorsement
Answer 400-TIRSA Standard NY Endorsement - Loa	an 🗸
TIRSA Standard NY Endorsement - Loan	
Cancel	10 Continue

The Policy Jacket is issued and is displayed for printing or downloading.





### Voiding a Policy Jacket:

1. Click the **Title** button.

<b>Training Demo</b>										
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2. Click Void/Revise EJacket.

Stewart Title Insur	ance Compa	iny			~	+	LIGENEY
Title Policies:						٠	
Owners Fee Simple	\$500,000.00	0-000	0-572728178				
Loan Mortgage	5300,000.00						
						×	
Policy Details:			15	2		•	
Policy Number:	ls:	sued Date:	End. Issued:	Policy Date:		d?!	
0-0000-572728178							
				_		1970	

3. Click **Void EJacket. NOTE:** Clicking **Revise EJacket** will direct you to the Stewart Access Portal to complete. This integration feature is coming soon.

Jacket Option	ns - Stewart Title		User Guide
Title Number	NY Training Demo		
Policy Number	0-0000-572728178		
Cancel	Revise CPL Fee	Revise EJa 3	Void EJacket

Stewart Title Jacket Options





4. Select a Void Reason from the dropdown.



The selected jacket is voided.