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Stewart Access – Creating a Policy Jacket in the Portal

Before you begin:
Stewart Access performs best with the latest versions of Google Chrome and Internet Explorer. Firefox is NOT recommended.

URL: https://access-ia.stewart.com/

Login Screen:

Place your cursor before “@twp.titlworkplace.local” and enter login name. Do not clear the field before entering information. Enter provided password.

A Search screen appears. The grid lists the last 30 days of files worked.

Detail link provides basic file information: Parties, Property Address and Lender information. 
Product link displays file production information: CPLs, Policies, Post Policy Endorsements, and File Charges.
To Search for an existing file, select Search by clicking anywhere on the banner

Enter Search parameters. You may Search by File Number, Buyer/Borrower, Seller or Property.

Search results appear if conditions are met.

If no matches are found, the following message appears. Clear Search parameters and search again.
Creating a Policy

To create a Policy Jacket inside the Stewart Access Portal, select **Jacket** from the menu.

Enter **File Number**, **Date**, **State**, **Location**, **Form Type**, **Form**, **Transaction Type** (optional) and **Liability**.

Transaction Type is not a required field.

As you enter information in the fields, additional tabs may appear. For example:

As you enter data in the fields, you may notice a pause as Stewart Access conducts validations in the background. This is normal.
Property Address

Select the Property tab, click Add.  

NOTE: The Property Address is required to create a Policy Jacket.

Enter the Property Address, click Save.

For multiple addresses, duplicate the process described above

NOTE: If a Property Address has been previously saved to the file, i.e. during the creation of the CPL, click Associate to add the Property Address.
Lender

Select the **Parties** tab, and then click Lender if issuing a Lender Policy.

![Lender tab selection](image)

Click Add.

![Add Lender dialog](image)

Enter the Search By criteria, click Search. You must enter the Name of the Lender and the City and State or Zip Code. The system will return a list of **Approved Lenders**. These Lenders have been added to the Stewart Access database via a vetting process which ensures spelling accuracy, naming convention and eliminates duplicates.

Select the desired **Lender** from the **Approved Lender** picklist.

If the Lender you desire is not listed, manually enter the Lender information by clicking the **Add** icon and entering the information in the fields provided. Click **Save**. Lenders entered manually become “**Prospect Lenders**” and will undergo the approval process outlined above. **Prospect Lenders** are promoted to **Approved Lenders** daily.

Add additional Lenders, duplicate the process described above.
Edit or add additional Lender information such as the Loan Number, Attention To and Successor Language by clicking the **Edit** icon. Select Save after making any updates to the grid.

<table>
<thead>
<tr>
<th>Primary</th>
<th>Favorite</th>
<th>Loan Number</th>
<th>Legal Name</th>
<th>Branch</th>
<th>Mailing Address</th>
<th>County</th>
<th>City</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Wells Fargo Bank N.A.</td>
<td>TANGLEWOOD RANDALL’S</td>
<td>6161 San Felipe</td>
<td>Harris</td>
<td>Houston</td>
<td>TX</td>
<td></td>
</tr>
</tbody>
</table>

To select a Lender marked as a Favorite, choose the “star” icon and select the desired Lender from the picklist.

The Primary checkbox is defaulted checked.

Selecting the Lender as a “Favorite” adds that Lender to the Favorites list. **Only Approved Lenders may be saved as Favorites.**

If a Lender has been previously saved to the file, i.e. during the creation of the CPL, click **Associate** to add the Lender. Select the desired **Lender** by clicking the checkbox. Click **Save**.

To edit any information entered for a **Lender after clicking Save**, delete the existing record and create another one.
Buyer/Borrower

Select the **Buyer/Borrower** tab, and then click **Add**.

Enter the Buyer/Borrower name or Business Name and Address, click **Save**.

For multiple Buyer/Borrowers, duplicate the process described above.

To edit any information entered for a Buyer/Borrower after clicking **Save**, delete the existing record and create another one.

If a Buyer/Borrower has been previously saved to the file, i.e. during the creation of the CPL, click **Associate** to add the Buyer/Borrower. Select desired Buyer(s) by clicking the checkbox.
Select the **Seller** tab, and then click **Add**.

Enter the **Seller** name or **Business Name and Address**, click **Save**.

For multiple Sellers, duplicate steps 9 and 10.

If a **Buyer/Borrower** has been previously saved to the file, i.e. during the creation of the CPL, click **Associate** to add the **Buyer/Borrower**. Select the desired **Seller(s)** by clicking the checkbox. Click **Save**.
**Original Policy Number**

If you are using an Original Policy to reissue a new Policy, select the Original tab and provide the information requested. This information is transmitted along with your new policy information.

OPN: Original Policy Number

To search for an existing Original Policy issued from Stewart Access, enter the File number or OPN and then select the Policy from the Original Jacket picklist.

If you have the Original Policy information, enter it into the appropriate fields.
Endorsements

If an Endorsement is needed, select the Endorsement tab and click Add. Select the desired Endorsement form the picklist and fill in Actual Premium and Actual Remittance charges. Select a Transaction Code from the picklist. Click Save.

All Endorsement information is included in the Policy transmittal. A printable Endorsement is not produced in Stewart Access.

If additional Endorsements are required, repeat the steps above.
Printing a Draft

Click to view a draft version of the Policy.

The Draft is displayed with a DRAFT watermark. It is removed when the Policy Jacket is issued.

A Policy Jacket remains in draft mode until it is issued. The Policy Jacket serial number is masked until the Policy Jacket is issued.
Once a Draft has been created, you must provide Jacket Pricing. Click the Jacket Pricing tab and select Edit.

Enter Transaction Code and Actual Premium, Click Save. The Actual Remittance amount is calculated based on your contractual percentage. The Actual Remittance may be edited to reflect what was charged.

While in Draft mode, you may delete a jacket by selecting the Delete icon.

**Transaction Codes**

Transaction Codes are essential for Policy Reporting. Each Policy and Endorsement requires a transaction code before issuing in Stewart Access. The two main purposes for including them in your Policy preparation are they:

- Drive premium rate calculation in some states
- Define the specifics of the transaction

It's important to use Policy Service's Rate Code Resource at Stewart.com to ensure proper reporting. To that end,

- Rate codes must be consistent for Department of Insurance (DOI) reporting
- Rate codes provide the basis for other requests for Market Conduct or the Stewart Legal department
- If a Rate Code entered does not match Policy Service's requirement, it will need to be corrected at the time of Policy Services processing. Correcting transaction codes at this point is time consuming and reduces turn around time.

How are the Rate Codes defined?

There are two categories of Rate Codes: Statistical and Non-Statistical.

- In Statistical States (California, Delaware, Florida, New Jersey, New Mexico, Ohio Pennsylvania, and Texas) the Department of Insurance (DOI) provides Rate Coding as well as specific reporting requirements. The underwriter collects these statistical requirements from the agent and reports them to DOI.
- In Non Statistical States, the DOI does not provide Rate Coding. Policy Services creates them. They may vary by underwriter. Even though the information is not being reported to a DOI, the code is used to provide essential information to the underwriter as outlined above.

Stewart.com provides a comprehensive list of transaction codes for the agent to use. Go to [INSERT WEB LINK] for more information or contact your Agency Services Manager for your state.
Print a Policy Jacket

Click **Issue** to Issue the Policy Jacket

All Policy Jackets are issued with a unique Stewart serial number as shown at the bottom of each page.

To Cancel an existing Policy Jacket, click **Cancel**. This action will cancel the generated serial number.
Revising a Policy

Issued Policies may be revised by selecting the Revise icon available after issuing a Policy.

You may revise the following fields:

![Revise Jacket Form]

Click Save after making revisions.
Simultaneous Issue

After issuing a Policy, if a Simultaneous Issue is needed, select the Simultaneous Issue icon.

Stewart Access populates many of the required fields for the SI policy.

Save and then issue the Policy.
Post Policy Endorsements

To issue an additional endorsement after a policy has been issued, select Post Policy Endorsement from the menu.

Enter the Original Jacket File Number

Select the Policy to which the Endorsement is being created. Click Save.
Click **Add**. Select the needed endorsement from the picklist. Enter the Actual Premium and Actual Remittance, if needed. Scroll to the right to enter a Transaction Code (required). Click **Update**.

To edit the endorsement information before issuing, click **Edit**, then make any changes.

To delete this endorsement before issuing, click **Delete**.

To issue the endorsement, click **Issue**.

Once issued, a unique Serial Number is generated by Stewart Access for the endorsement.

To delete an Issued endorsement, click **Cancel**. The endorsement is removed and marked as “Cancelled” for Policy Register purposes. This information is sent in the next Transmittal.
Searching

After logging in through the portal, the following Search window displays. This Search features allows you to search for existing files with CPLs that have been created in the Portal. Enter your search parameters and click the Search icon.

The Search results appear at the bottom of the Search window:
Selecting the Detail or Product links will provide additional information about the file:

<table>
<thead>
<tr>
<th>Detail</th>
<th>Product</th>
<th>File</th>
<th>Modified Date</th>
<th>Buyer Borrower</th>
<th>Seller</th>
<th>Property</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>MAK1001</td>
<td>8/6/2015</td>
<td>John Smith</td>
<td></td>
<td>2100 Century road</td>
</tr>
</tbody>
</table>

The **Detail** link provides a summary view of the Properties, Lenders, Buyer and Sellers for the selected file.

### Property

- **Property Type**: Multi-Unit Dwelling 2-4 Units
- **Address Line 1**: 2100 Century road
- **City**: Paradise
- **State**: OH
- **ZIP**: 70007
- **County**: Ashland
- **Country**: USA
- **Lot**: first

### Lender

- **Count**: 0

### Buyer/Borrower

- **Count**: 1

### Seller

- **Count**: 0
The **Products** link provides a summary of the created documents for the file selected.

You may also **Search** for Details and Products using the File menu at the top of the page:
Policy Register

To create a Policy Register, select Register from the menu.

Enter any Search parameters in the following screen. Click Search.

The Policy Register Report may be downloaded or printed from this screen. Click OK when finished viewing.

Example of printed Policy Register:

<table>
<thead>
<tr>
<th>File Number</th>
<th>Policy Number</th>
<th>Issue Date</th>
<th>Effective Date</th>
<th>Policy Type</th>
<th>Liability</th>
<th>County Code</th>
<th>Municipality</th>
<th>Town Code</th>
<th>Property Type</th>
<th>Total Issued for File</th>
<th>Partial Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test File 111914</td>
<td>M-2000-180279452</td>
<td>02/10/2016</td>
<td>02/10/2016</td>
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<td>000</td>
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<td>Residential</td>
<td>2,000.00</td>
<td>200.00</td>
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</tr>
<tr>
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<td>02/11/2016</td>
<td>02/11/2016</td>
<td>Endorsement</td>
<td>000</td>
<td>013</td>
<td>505</td>
<td>Residential</td>
<td>32.00</td>
<td>12.00</td>
<td></td>
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<tr>
<td></td>
<td>E-2000-181814060</td>
<td>02/11/2016</td>
<td>02/11/2016</td>
<td>Endorsement</td>
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<td>013</td>
<td>500</td>
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<td>Residential</td>
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</tr>
</tbody>
</table>

Total Issued for Location: 2,710.00 | 400.00
Monthly Statement

You will receive a Monthly Statement of Activity from Policy Services after you begin issuing Policies from Stewart Access.

This is a statement of activity, not an invoice.

The statement provides a “snapshot” of activity for a defined period of time including policies reported and remittance payments applied.

---

### August 2016 Statement

<table>
<thead>
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<th>Agency ID Number</th>
<th>000000</th>
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<tbody>
<tr>
<td>ABC TITLE AGENCY</td>
<td></td>
</tr>
<tr>
<td>123 Oak Drive</td>
<td></td>
</tr>
<tr>
<td>Houston, TX 77025</td>
<td></td>
</tr>
</tbody>
</table>

#### Policy Detail

<table>
<thead>
<tr>
<th>Policy Date</th>
<th>Policy File Number</th>
<th>STG Policy Number</th>
<th>STE Policy Number</th>
<th>STE Endorsements</th>
<th>Trans Code</th>
<th>Liability</th>
<th>Policy Premium (per STG)</th>
<th>Policy Premium (per Policy)</th>
<th>Remittance Amount (per STOOC)</th>
<th>Payment Amount</th>
<th>Received Date</th>
<th>Receipt Number</th>
<th>Check No.</th>
<th>Diff.</th>
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</thead>
<tbody>
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<td>07/10/16</td>
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<td>50D</td>
<td>0.00</td>
<td>75.00</td>
<td>75.00</td>
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<td>75.00</td>
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<td>07/15/16</td>
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<td>File Total</td>
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<table>
<thead>
<tr>
<th>Policy Date</th>
<th>Policy File Number</th>
<th>STG Policy Number</th>
<th>STE Policy Number</th>
<th>STE Endorsements</th>
<th>Trans Code</th>
<th>Liability</th>
<th>Policy Premium (per STG)</th>
<th>Policy Premium (per Policy)</th>
<th>Remittance Amount (per STOOC)</th>
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<td>File Total</td>
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<td>38,000.00</td>
<td>224.25</td>
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<td>67.25</td>
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<tr>
<th>Policy Date</th>
<th>Policy File Number</th>
<th>STG Policy Number</th>
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<th>Remittance Amount (per STOOC)</th>
<th>Payment Amount</th>
<th>Received Date</th>
<th>Receipt Number</th>
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<th>Policy Date</th>
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<th>STG Policy Number</th>
<th>STE Policy Number</th>
<th>STE Endorsements</th>
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<th>Remittance Amount (per STOOC)</th>
<th>Payment Amount</th>
<th>Received Date</th>
<th>Receipt Number</th>
<th>Check No.</th>
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<tr>
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<table>
<thead>
<tr>
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<th>Policy File Number</th>
<th>STG Policy Number</th>
<th>STE Policy Number</th>
<th>STE Endorsements</th>
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<th>Liability</th>
<th>Policy Premium (per STG)</th>
<th>Policy Premium (per Policy)</th>
<th>Remittance Amount (per STOOC)</th>
<th>Payment Amount</th>
<th>Received Date</th>
<th>Receipt Number</th>
<th>Check No.</th>
<th>Diff.</th>
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</tr>
</tbody>
</table>

The upper right area is contact information for Policy Services if you have a question about your monthly statement. The remittance address is also listed there.

The statement provides the file number with the associated policies, endorsements and CPL’s, if any. If there are any adjustments, these appear below the file detail.

The Summary section lists the Statement Date and the Closing Date. If a payment is received within the date range of the statement, the amount is applied to the file. Policies or premium payments received after the Closing Date (not the file closing date) on the statement will be reflected on the next statement.
In the example above, notice payments have been applied to the selected files.
In this example, payments have been received but Policy Services was unable to match the amount to any file. Therefore, payments must contain a detailed record of which policies the payment covers.
Help
Stewart Access is intuitive software allowing the user to easily create Policy jackets and report policy information. Additionally, a comprehensive Help guide is available by selecting the Help menu.

The Help Module allows you to choose an area of interest from the navigation menu on the left side of the screen or perform a keyword search using the Search button at the upper left of the screen.

The Help Module then provides you with step-by-step instructions to complete your task.
Stewart Access provides a User Voice forum allowing users to communicate valuable feedback to Stewart regarding its software. To access this forum, select Contact Us from the top menu. Enter your feedback in the fields.

For additional assistance, please contact the Stewart Customer Care Center. Contact information is provided from the Contact menu.