

Stewart Access 2.5 and TitleExpress - Jacket

Follow the steps below to access utilize the Stewart Access 2.5 integration with TitleExpress.

Note: This Quick Reference Card assumes a file has been entered and you are ready to issue a Jacket.

Steps

- 1. Click the **Policy** tab, then click **Request** next to Jacket. This opens the Underwriter Wizard. Enter your credentials and click **Next**.

The screenshot shows the 'Underwriter Wizard' login interface. At the top left is the 'TitleExpress' logo, and at the top right is a blue link for 'STGC Login'. Below the logo, there is a prompt: '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 masked characters '*****'. At the bottom, there are four buttons: 'STGC Online' (a link), '<< Back', 'Next >>' (highlighted with a red box), and 'Cancel'.

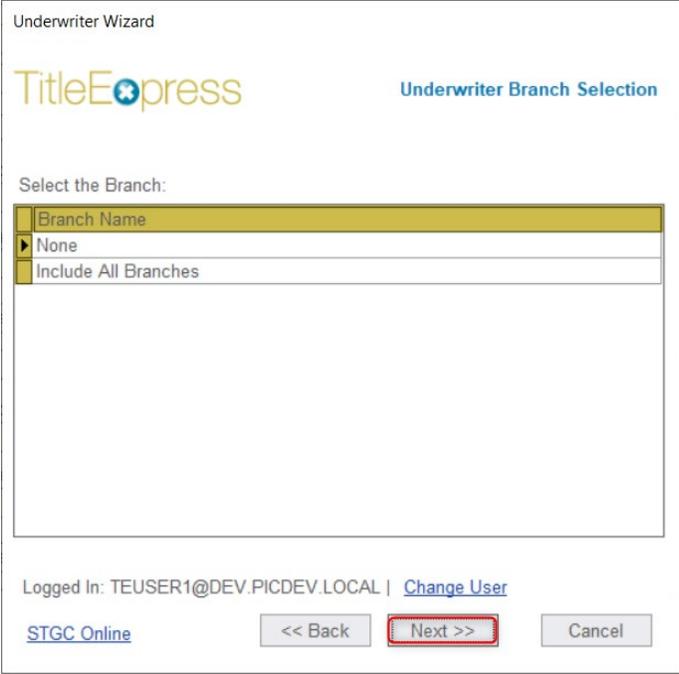
- 2. Select the **Agency** and Location from the list and click **Next**.

The screenshot shows the 'Underwriter Wizard' agency selection interface. At the top left is the 'TitleExpress' logo, and at the top right is a blue link for 'Underwriter Selection'. Below the logo, there is a prompt: 'Select the Agency and Location:'. There is a table with two columns: 'Agency Name' and 'Location'. The table contains four rows of data. The first row is highlighted in blue. At the bottom of the table, there is a scroll bar. Below the table, there is a status bar that says 'Logged In: TEUSER1@DEV.PICDEV.LOCAL | Change User'. At the bottom, there are four buttons: 'STGC Online' (a link), '<< Back', 'Next >>' (highlighted with a red box), and 'Cancel'.

Agency Name	Location
StewartAccess Int Test 2nd	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

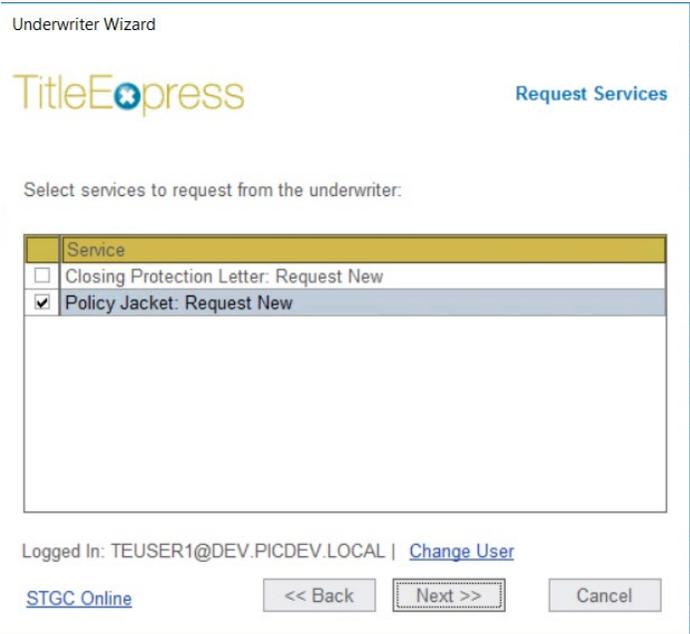
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3. Select the **Branch** and click **Next**.



The screenshot shows the 'Underwriter Wizard' window with the 'Underwriter Branch Selection' step. The TitleExpress logo is in the top left. Below it, the text 'Select the Branch:' is followed by a table with three rows: 'Branch Name', 'None', and 'Include All Branches'. The 'None' row is selected. At the bottom, there is a 'Logged In: TEUSER1@DEV.PICDEV.LOCAL | Change User' link, a 'STGC Online' link, and three buttons: '<< Back', 'Next >>' (highlighted with a red box), and 'Cancel'.

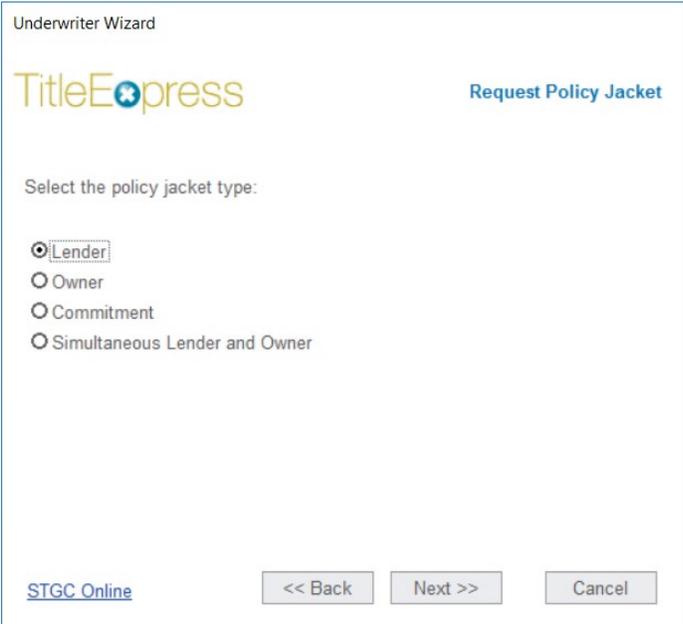
4. Select **Policy Jacket: Request New** in the Request Services window and click **Next**.



The screenshot shows the 'Underwriter Wizard' window with the 'Request Services' step. The TitleExpress logo is in the top left. Below it, the text 'Select services to request from the underwriter:' is followed by a table with three rows: 'Service', 'Closing Protection Letter: Request New', and 'Policy Jacket: Request New'. The 'Policy Jacket: Request New' row is selected and has a checked checkbox. At the bottom, there is a 'Logged In: TEUSER1@DEV.PICDEV.LOCAL | Change User' link, a 'STGC Online' link, and three buttons: '<< Back', 'Next >>' (highlighted with a dashed box), and 'Cancel'.

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5. Select the Policy Jacket Type and click **Next**



Underwriter Wizard

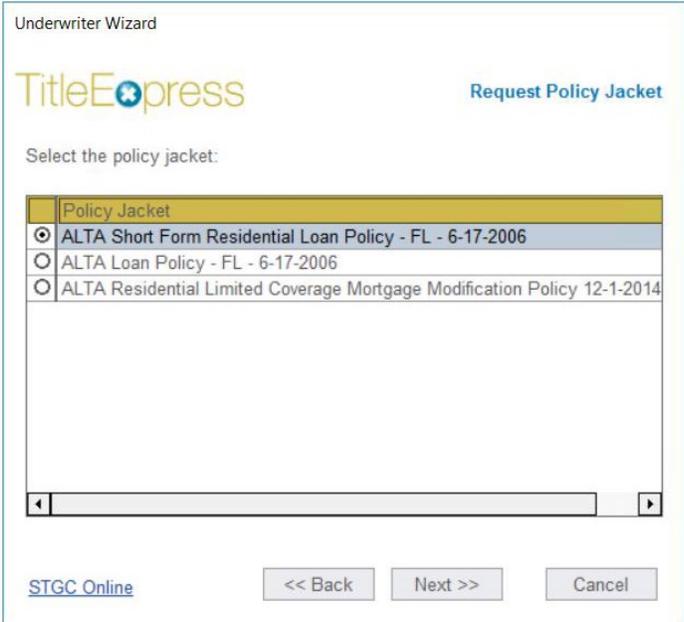
TitleExpress Request Policy Jacket

Select the policy jacket type:

- Lender
- Owner
- Commitment
- Simultaneous Lender and Owner

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

6. Select the desired Jacket and click **Next**.



Underwriter Wizard

TitleExpress 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

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7. If a **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 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-...
<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

8. 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

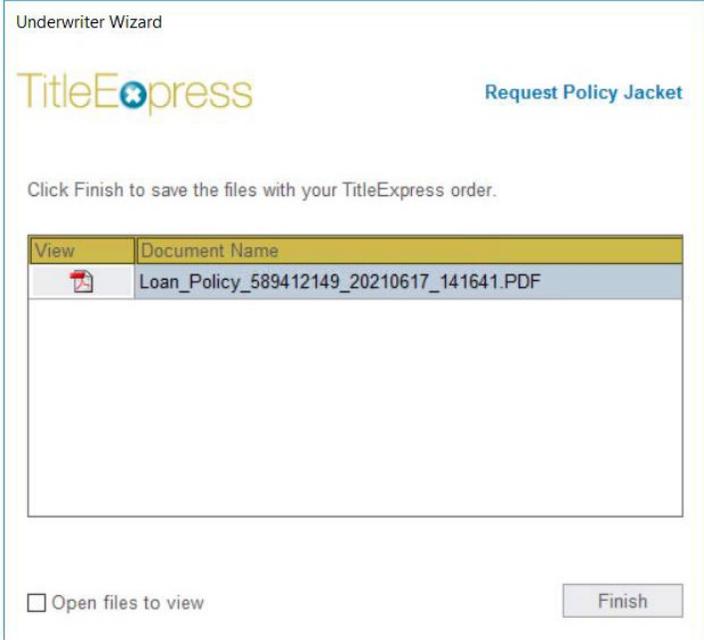
Mortgage Date

State Statutes

STGC Online << Back Next >> Cancel

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



Underwriter Wizard

TitleExpress [Request Policy Jacket](#)

Click Finish to save the files with your TitleExpress order.

View	Document Name
	Loan_Policy_589412149_20210617_141641.PDF

Open files to view Finish

NOTE: 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.

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Revising or Voiding a Policy Jacket:

10. Select **Policy Jacket: Update** or **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 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

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

11. Select the Policy Jacket to **Revise** or **Void** and click **Next**.

Underwriter Wizard

TitleExpress 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-0003-589624781	Lender	ALTA Short Form Residential

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

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

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12. Make any necessary revisions, or, if voiding, select a reason for voiding 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

13. 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