

Stewart Title Company Plug-in

User Guide September 6, 2018



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Introduction

This document walks you through the on-boarding process to use the **Stewart Title Company** plug-in within the *Ellie Mae Encompass* application.

This integration between Stewart and Encompass lenders permits users to submit loan order request, confirm status of work performed, receive loan documents and view loan results from within the plug-in.

Key Features of the Stewart Title Company Plug-in

Using this plug-in you can:

- Place new orders Refinance and Purchase transaction types
- Check the status of submitted orders
- Receive, send and view documents
- Select a Stewart office to route an order to
- Link loan files
- Obtain Title fee quotes for the Stewart Rate Calculator
- Automatically import title fee quote data into the Encompass 2015 Itemization Form
- Send communications via the notes service
- Request new account access to the plug-in

Prerequisites

Username and Password Setup

Before an order can be submitted, an account with Stewart must be created with the names of users who will submit orders. An on-boarding process is required for lenders to get set up to use the *Stewart Title Company* plug-in into *Encompass.* Your Stewart point of contact will provide you with the necessary form, as shown below to request access to this plug-in.



Access to Email

A Desktop Email Client application, such as Microsoft Outlook must be installed to use the Request links.

Suggested URL and Ports

For Network Administrators Only

Some users have experienced errors when logging into the *Stewart Title Company Plugin*. This may be caused by their Company's network blocking certain external websites. The below information can be communicated to your Network Administrator.

Please make sure the following URL and ports are white listed for best performance of the Stewart Title Company Plugin:

URL Endpoint:

- https://esb.stewart.com/AuthenticateEPIUser
- https://esb.stewart.com/api/ContractInfo
- https://esb.stewart.com/api/EncompassStatusList
- https://esb.stewart.com/api/getDocTypes
- https://esb.stewart.com/api/TitleOrderRequest
- https://esb.stewart.com/api/TitleOrderNotes
- https://esb.stewart.com/api/TitleOrderStatus
- https://esb.stewart.com/api/TitleOrderDocuments
- https://esb.stewart.com/api/TitleOrderCancel

Hostname:

esb.stewart.com

Port:

• TCP/443 (HTTPS)



The use of HTTPS Proxy and MIT SSL Traffic Sniffing can affect the performance of the plugin and cause issues to login. Please make sure that no redirection is been done to the URL endpoint mentioned above.

Launching the Plug-in

Steps

- 1. From the *Encompass Services menu*, click the **Services** drop-down from the top menu; or the *Services* tab on the left side of the screen.
- 2. Select Title & Closing



- 3. From the *Providers tab*, select Stewart Title Company.
- 4. In the Search text box, enter Stewart Title or Stewart. The Order Title & Closing pop-up displays with a list of search results.
- 5. From the Order Title & Closing pop-up, click the Nationwide radio button.



- 6. Under All Title Companies, select Stewart Title Company.
- 7. Click Next. The Stewart Title Company plug-in screen displays.

Logging In

Steps

- 1. When the plug-in is first launched, the Order, Status, Document and Communications tab displays.
- 2. Enter your login credentials.
- 3. Click Login to continue.
- 4. (Optional) Click the Remember Me checkbox to save the Username for reentry.

	Stew	art Title Company		×
stewart			Real partners.	Real possibilities.™
Login Information Usemame: [Password: Password: Login Bequest Access Request Technical Support Order Status Documents (0) Selected Office	Loan Information Borrower: CoBorrower: Property Address: County: Request Transact Communications Message Plac	Closing, John Doe 1822 Parker Cout Brmingham, AL 35213 Jefferson ion Support es : e Order cance late Fees import	Loan Number: Transaction Type: Loan Type: Loan Amount: Purchase Price: Escrow File Number Escrow File Number	170800458 Cash-Out Refinance Conventional 155.000.00 09/22/2017
				Close

Request Access

If you do not yet have your Username and Password, click the **Request Access** button. The Sales team is notified and will contact you for more information (if needed) to quickly assign your user credentials.

	Stew	art Title Company		×
stewart		P	Real partners.	Real possibilities.™
Login Information Usemame:	Loan Information Borrower: CoBorrower: Property Address: County: Request Transact Communications Message Plac	Closing, John Doe 1822 Parker Court Birmingham, AL 35213 Jefferson Ion Support e Order e Order ate Fees Import	Loan Number: Transaction Type: Loan Type: Loan Anount: Purchase Price: Est Cosing Date: Escrow File Number	170800458 Cash-Out Refinance Conventional 155.000.00 09/22/2017
				Close

Using the Order Tab

Once logged in, you can use the Order tab to begin processing your order. From the *Order tab*, you have the option to select a Stewart office to route an order request, place an order, calculate fees from the Stewart Rate Calculator, or to request the cancellation of an order that has been placed.



Only pre-defined products, Refinance and Purchase Transactions, are eligible to be ordered.

Steps

- 1. Once logged in, the Order tab displays with the Order information.
- 2. Select a Stewart office to route the order.

	S	tewart Title Com	oany	
stewart			Real partners	. Real possibilities.™
Login Information	Loan Informat	lion		
Usemame: testuser01 Password: Password: Remember Me Login	Borrower: CoBorrower: Property Addr County:	Closing, John Do ress: 1822 Parker Cou Birmingham, AL 3 Jefferson	e Loan Number: Transaction Type: t Loan Type: 5213 Loan Amount: Purchase Price:	170800456 Cash-Out Refinance Conventional 155,000.00
Login Successful Request Technical Support	Request Tran	saction Support	Est Closing Date: Escrow File Number	09/22/2017
Order Status Documents (C) Communica	ations		
Selected Office Stewart Centralized Title Se 500 North Broadway Suite 900 St. Louis, MO 63102 844-573-5082	rvices	Messages:		
Centralized Local Office		Place Order	Cancel Order	
Locate Office		Calculate Fees	Import Fees	
				Class

Note on Selecting an Office

If the Lender has a contract with Stewart Centralized Title Services (CTS), that location will automatically be denoted under the *Selected Office* section.

Lenders also have the option to select a different Stewart office to route an order request. Click the **Local Office** button. A pop-up displays with the property address included with the order, along with options to search for a Stewart office by a different address or zip code.

A Stewart office can be located using the property address included with the request. You can also enter another address or zip code to locate the Stewart office.

		Stew	art Title Company	y .		×		
stewar	•			Real partners.	Real possibilities.	-		
Login Infor	nation	Loan Information						
Usemame Password: Login Suo Request T	Testuser01	Borrower: CoBorrower: Property Address: County: Prequest Transacti	Cosing, John Doe 1822 Parker Court Birmingham, AL 35213 Jefferson	Loan Number Transaction Type: Loan Type: Loan Amount: Purchase Price Etil Closing Date Escrow File Number	170800455 Cash-Out Refinanc Conventional 155.000.00 09/22/2017	*		
Inder St	atus Documents (0)	Communications		7444		_		
		Search By Prop 182 Bim Cou	ety Address: 2 Parker Court ingham, AL 35213 rtty: Jefferson	O Address: Oty: State:			Zp Code:	35213
Lo	cate Office				Distanc	e (miles)	10 ~	Find Office(s)
-		Company		Address	City	State	Phone	Distance
		Common B	ind Title LLC	300 Office Park Drive Suit	e Mountain Br	AL.	205-421-1010	2.53
					COLUMN AND ADDR	1.61	205-536-6999	14.81000000.
		Vestavia T	tie. LLC	701 Chesthut Street	Testaria rina	-		
		Vestavia T Parker Law	fle, LLC Firm, LLC	1560 Montgomery Highwa	y Birmingham	AL.	205-823-7061	7.76

When an office is located and selected, that office displays under the Selected Office section of the Order tab.

stewart			Real partners	. Real possibilities."
Login Information	Loan Information		10000201003	0.000
Username Destruter01 Password Passw	Borrower CoBorrower Property Address County	Closing, John Doe 1822 Parker Court Birmingham, AL 35213 Jefferson	Loan Number: Transaction Type: Loan Type: Loan Amount: Purchase Price:	170800456 Cash-Out Relinance Conventional 155.000.00
Login Successful Request Technical Succest Order Status Documents (D)	Bequest Transaction	on Support	Escrow File Number	
Selected Office Vestavia Title, LLC 701 Chestrut Street Vestavia Hila, AL 35216 205-536-6999	Message			
Locate Office	Place	e Order Cancel	Fees	
				Oose

Calculating Fees

From the Order tab, you also have the option to Calculate Fees from the Stewart Rate Calculator to receive a quote.



When calculating fees, the preferred browser for using the Stewart Rate Calculator is **Google Chrome**.



Steps

1. Click **Calculate Fees**. A pop-up displays, with instruction for adding the full Rate Quote to the e-Folder.



- 2. Click OK to continue.
- 3. The *Stewart Rate Calculator* screen displays with pre-populated information for **County**, **City**, **State**, and the **Transaction Type** from the *Order* screen.
- 4. Enter information in the remaining fields relating to the quote.

5. Click Calculate Rates.

stewart				Stewart Rate Calculator
User Information				
What is your role?	I am a Lander	۲	Advanced Options	
Property Informatio	on			
State:		County:		City:
Alabama	*	Jefferson	*	Birmingham
Prefer using a ZIP code?				
Loan Information				
Transaction Type:	Refnance		Refi Loan Policy:	Basic Loan Palicy Refinance Rata
Transaction Amour	it			
Loan Amount:				
\$155,000.00				
Has this property beer > Yps * No You have 0 endorsements in	purchased or refina Select Endorsements wincted	nced in the last 5 years	la contraction de la contractica de la contracti	Select Covernmental Fees
	Difference of the			
Settlement Office selected	Li Senet Office			
		E Calcul	ate Rates	

The **TRID Premiums**, **Endorsement Amounts**, **Title Service Fees**, and **Recording Fees/Transfer Taxes** can be imported into the *Encompass 2015 Itemization Form*.

6. From the Stewart Rate Calculator screen, click Download PDF.

rt Rate Calculato	Stev		stewart
@ Beck to celouletor			
			ransaction Information
18/25/201	Good Through	9/20/2017 09/00	Quole Dale
	Slale	Dirmingham	City
	Ζip	Jefferson	Geunity
N	Simulancom	Refinance	Transaction Type
eic Loan Policy Refinance Rat	Lender Policy Type	\$155,000.00	New Loan Amount
\$+\$0,000.0	Unpaid Balance	\$200,000.00	Original Debi A wount
;	Moolgage / Rages	3	Release / Rages
N	ion of an existing deed of trust?	Is this a modifica	
N	Igagee a Federal Gredit Union?	In the Me	
N	he lime to pay being extended?	ia	
N	in ing from the original amount?	In the amount of the loan incre	
5340.3	Lender's Policy		
50.0	Lender's Policy Tax		
\$340.2	Total		
	Release Recording Fee	1XES 500.00	ecording Fees/Transfer T
\$10.0			Mortgage State Transfer Tax
\$10.0		\$232.50	
518.0		\$232.50	Movigage County Transfer Tax
518.0		\$332.60 \$0.00 \$0.00	Morigage County Transfer Tax Morigage City Transfer Tax
5180	ad PDF	5232.50 50.00 50.00	Merigage Geanly Transfer Tax Merigage Gig Transfer Tax

For your records and to add other fees to the *Itemization Form*, please click the **Download PDF** button to save a copy of the quotes from the *Stewart Rate Calculator* to your local machine before exiting the screen. You can also save this PDF in the **Encompass e-Folder**.

- To import the TRID Premiums, Endorsement Amounts, Title Service Fees, and/or Recording Fees/Transfer Taxes, close the Stewart Rate Calculator and return to the Stewart Title Company plugin. Use the PDF copy of the quotes for your reference (if needed).
- 8. From the *Stewart Title Company* plug-in, click the **Import Fees** button to import from the options of TRID Premiums, Endorsement, Title Service Fees, and Recording Fees/Transfer Tax amounts. The *Select Fees to Import* pop-up displays.

Stewart Title Company		-		X
stewart			Real partners.	Real possibilities.™
Login Information	Loan Information			
Usemame: [testuser01] Password: I Remember Me Login	Borrower: CoBorrower: Property Address: County:	Kennedy, Trevor 2 Kennedy, Lilly 2139 Sugar Court Orlando, FL 32825 Orange	Loan Number: Transaction Type: Loan Type: Doan Amount: Purchase Price: Est Closing Date:	180 Purchase Conventional 600,000.00 650,000.00
Login Successful Request Technical Support	Request Transaction	on Support	Escrow File Number	8334
Order Status Documents (5) C	Communications (1)			
Selected Office Stewart Centralized Title Service 500 North Broadway Suite 900 St. Louis, MO 63102 844-573-5082	Message Welcom documer	s: e back! Please click the 'C nt, and message updates.	heck for Updates' button	to receive status,
 © Centralized © Local Office Locate Office 	Place	e Order Cance ate Fees Impo	el Order	
Need Help?		[Check for Updates	Close

- 9. From the Select Fees to Import pop-up, select the checkbox to select the fees to import into the 2015 Itemization Form.
- 10. Select the checkbox(es) to add a Stewart Rate Quote document into the e-Folder of Encompass, and/or add a Stewart office to the Settlement Server Provider List.

\leq	HUD Line #	Fee Description	Buyer Amount	Seller Amount
	1103	TRID - Owner's Policy	\$0.00	\$377.00
	1104	TRID - Lender's Policy	\$1,983.00	\$0.00
	1110	Owner's Endorsement(s)	\$0.00	\$226.00
	1111	Lender's Endorsement(s)	\$99.15	\$0.00
\square	1102	Title Certification Fee	\$48.00	\$0.00
	1102	Closing Fee	\$300.00	\$0.00
	1102	Title Document Preparation Fee	\$85.00	\$0.00
	1102	Title Guaranty Assessment Recoupment	\$9.00	\$0.00
	1202	Mortgage - Recording Fees	\$117.00	\$0.00

- 11. Click the Import Selected Fees button.
- 12. The Fee Import pop-up displays with the number of fees that have imported successfully.



You can view the imported fees from the e-Folder in Encompass.

Alerts & Messages Log	Q	201	5 Itemization			R	EOZ-LE	terrization	LE1 LEZ	LES	CD1 CD2	CD3 C
File Started	97/23/19											
Send to processing												
E Submittel		A	1100 This Charges				Ber	terret .	Selar	Otheri	749	
Cond. Approval		~	1100. The Charges				1,5	103.00			1,9	58.00
Resubmittal									Caller (2)	Daid De	-	4.7.0
Approval							05	arower	sener (8)	Faid by	IF IDIA IFE	010
Ready for Docs			1101. Title Insurance Services			1000						
Docs Out			Te			int.				I		
Funding		12		U Te							OBB	~
Shipping		3		w Te			- 2				Dee	~
Constitution		10		V Te		-					OBB	
The completion		1		G.,		-					Cimin -	141
				- C		-		-				-
		6		Y Te	·	_	- 3	_	-	×		~
		6		w Te						Y		4
			E temize fees when pr	nt								
			= Title Insurance Services									
			1102 Settlement or Cinaina Feet	2								
	1	10	Settlement Fee	Те	1	102	- r		-		OPPE	Y
Forms Tools Services		12	Closing Fee	To	Stewart Title of Cal	Morni	1	350.00			200	¥
1003 Page 1	14	2	Escrew Fee	Te			12			V	CODE	Y
1003 Page 2	111	10	Courier Fee	V Te	Stewart Title of Cal	Marri		20.00			ZMM	141
1003 Page 3			Dead Discostation East		Element Title of Cal	Martin		75.00			amp	1
1003 Page 4			and a reparation for		decinant rate of ca			10.00	-		Comm [1000
1098 Mortgage Interest		100	Electronic Document Dee	V 10	Stewart i be of Ca	angema		10.00	-		NEE	•
2015 temization		C	Signing Agent Fee	Y To	Stewart Title of Cal	Morni		150.00		~	SDD.	¥
Additional Disclosures Information		E	Wire Transfer Fee	₩ T¢	Stewart Title of Cal	Morni	1.00	17.00		~	200	~
Additional Requests Information		C.	1103. Owner's Title Insurance			622	3				OBB	~
Attiliated Business Arrangements		100	1104. Lender's Title Insurance	Stewa	n Title of California, In	00	128	1,326.00	0.00		REE	V
Attailed Business Disclosure			1105 Landar's Title Policy Limit	and the second	interest of a second second second	0000	100	Concernance (second		1		bend .
Aggregate Escrow Account			1100 Connects Tills Policy Link	-								
A ITAM MARAYOURIE			1100. Onmer's Tibe Poscy Link									

13. To view a pdf of the Stewart Rate Quote, click the Documents tab from the Stewart Title Company Plugin.

				Real partners.	Real possibilities.™
ogin Infom	nation	Loan Information			
lsemame:	testuser01	Borrower:	Kennedy, Thomas 2	Loan Number:	180201515
assword:		CoBorrower:	Kennedy, Lilly	Transaction Type:	Purchase
	Remember Me	Property Address:	2133 Sugar Court Orlando, FL 32825	Loan Type:	Conventional
	Login	County:	Orange	Purchase Price:	150,000.00
			100 m T 100	Est Closing Date:	
ogin Succ Request Te	essful achnical Support	Request Transacti	on Support	Escrow File Number:	3085-18
.ogin Succ Request Te rder Sta	essful echnical Support atus: Documents (7)	Request Transacti	on Support	Escrow File Number:	3085-18
ogin Succ Request Te rder Sta	essful schnical Support stus Documents (7) Name	Request Transacti	Send Documents	Escrow File Number:	3085-18
ogin Succ Request Tr rder Sta	essful schnical Support tus Documents (7) Name Stewart Rate	Request Transacti	Send Documents Date 4/13/2018	Escrow File Number:	3085-18 Wew Document Status Success
ogin Succ Request Tr rder Sta Received Sent	essful echnical Support itus Documents (7) Name Stewart Rated Settlement St	Bequest Transacti Communications	on Support Send Documents Date 4/13/2018 3/13/2018	Escrow File Number: Resend Document 10:00 AM 13:53 PM	3085-18 Wew Document Status Success Success
ogin Succ Request Te rder Sta Received Sent Sent	essful connical Support tus Documents (7) Name Sterwart Rated Settlement St TEST Doc.d	Bequest Transacti Communications	Send Documents Date 4/13/2018 3/13/2018 3/5/2018	Escrow File Number: Resend Document 1000 AM 3:53 PM 3:03 PM	3085-18 Wew Document Status Success Failure
Request Te rder Sta Received Sent Sent Sent	eseful <u>cchnical Support</u> <u>tus</u> Documents (7) Name Sevent Refe Settlement S TEST Doc.d TEST Doc.d	Request Transactiv	End Documents Date 4/13/2015 3/5/2018 3/5/2018	Escrow File Number: Resend Document 10:00 AM 3:53 PM 3:03 PM 2:54 PM	3085-18 View Document Status Success Failure Failure
rder Sta Received Received Sent Sent Sent Sent Sent	Name Settlements (7) Name Settlements TEST Doc.d TEST Doc.d	Request Transacti Communications Cuote add Catement.docx pocx pocx	Send Documents Date 4/13/2018 3/13/2018 3/5/2018 3/5/2018 3/5/2018	Escrow File Number: Resend Document 1000 AM 13 53 PM 3:03 PM 2:54 PM 2:54 PM	3085-18 Wew Document Status Success Failure Failure Failure
An and a second	Name Name SeventRate Settlement S TEST Doc.d TEST Doc.d	Request Transacti Communications Ducte pdf atement dock sock pock sock	sen Support Send Documents Date 4/13/2018 3/5/2018 3/5/2018 3/5/2018 3/5/2018 3/5/2018	Escrow File Number: Resend Document 10:00 AM 3:03 PM 2:54 PM 2:54 PM 2:54 PM	3085-18 Vew Document Status Success Falure Falure Falure Falure Falure

Note on Calculating Fees

Not all fees are currently available for import. However, a copy of the PDF can be downloaded and saved to your local machine and can then be added to the **Encompass e-Folder**.



Note on Additional Fees

The following tax fees have been imported into the Stewart Rate Calculator:

- Florida Mortgage Intangible tax (line 1206 on the 2015 Itemization Form)
- Minnesota Mortgage Conservation Fund
- Minnesota Deed Conservation Fund

Placing an Order from the Order Tab

Return to the Order tab to place the Encompass order.



When an order is submitted, the option to select a Stewart office for order routing is disabled.

Steps

1. The plug-in is populated with data from the Encompass loan file. Click **Place Order** when you are ready to submit the file.

Stewart Title Company				X
stewart			Real partners.	Real possibilities.™
Login Information	Loan Information			
Usemame: testuser01 Password:	Borrower: CoBorrower: Property Address: County:	Kennedy, Trevor 2 Kennedy, Lilly 2139 Sugar Court Orlando, FL 32825 Orange	Loan Number: Transaction Type: Loan Type: Loan Amount: Purchase Price: Ett Ciscies Price:	180 Purchase Conventional 600,000.00 650,000.00
Login Successful Request Technical Support	Request Transactio	on Support	Escrow File Number:	8334
Order Status Documents (5) (Communications (1)			
Selected Unice Stewart Centralized Title Service 500 North Broadway Suite 900 St. Louis, NO 63102 844-573-5082	es	S:		
Ocentralized	Plac	e Order Cano	el Order	
Local Office Locate Office	Calcula	ate Fees Impo	rt Fees	
Need Help?		(Check for Updates	Close

Once the order is submitted, a confirmation message displays confirming the order processing has begun.

	Stewart Title Company	x
stewart	Real partners. Real possibilities:	
Login Information	Loan Information	
Usemame: testuser01 Password:	Borrower: Closing, John Doe Loan Number: 170800456 CoBorrower: Transaction Type: Cash-Out Refinance Property Address: 1822 Parker Cout Birmingham, AL 35213 County: Jefferson Purchase Price:	
Login Successful Request Technical Support	Est Closing Date: 09/22/2017 Escrew File Number:	
Order Status Documents (0)	Communications	
Selected Office Vestavia Title, LLC 701 Chestnut Street Vestavia Hills, AL 35216 205-536-6999	Messages: Thank you for your request. We will begin processing your order shortly.	
Locate Office	Place Order Cancel Order Calculate Fees Import Fees	
	Cose	

Information on Linking an Existing Order

Orders initially opened by a directing third party, such as a realtor, can be linked by resubmitting the order through the *Stewart Title Company* plugin. Linking existing open orders provides all the benefits of integration on orders submitted directly by a realtor partner. Comments can be included in the <u>Communication tab</u> once the order is placed to convey other information related to the loan requests to be linked.

Status Tab

Use the *Status tab* to check the current status of a submitted order. Below is a list that defines each column in the *Status grid*:

- Status The name of the task completed on the order.
- Completed Date (CST) The date and time the task was completed.
- Updated Date (CST) The date and time the task was been changed or edited.

Steps

1. From the *Status* tab, click the **Check Status** button. A *Status* grid displays, detailing the available file statuses. As statuses are updated, the completion dates and times reflect in the Status grid.



Once the order request is accepted for processing, the **Order Confirmed** date and time displays under the *Status tab.* The file number associated with the newly created order displays on the screen as the **Escrow File Number**.

Stewart Title Company stewart	IE	W	Real partners.	Real possibilities.™	
Login Information	Loan Information				
Usemame: testuser01 Password: ************************************	Borrower: CoBorrower: Property Address: County: Request Transaction	Kennedy, Trevor 2 Kennedy, Lilly 2139 Sugar Court Orlando, FL 32825 Orange	Loan Number: Transaction Type: Loan Type: Loan Amount: Purchase Price: Est Closing Date: Escrow File Number	1803) Purchase Conventional 600.000.00 650,000.00 38334	
Status	Com	inlated Data	Undated Date		
Order Confirmed	3/6/	2018 10-06 AM	opuaco Dale		
Sales Contract Received	0,0,.	2010 10.00744			
Commitment Completed				 Check for Updates 	×
Curative Cleared				-	
Sattlement Statement in Programs				The following upda	tes were received:
Sattlement Statement Complete					
Closing Complete				0 status updates 0 new documents	
Wire Received				0 new messages	
Loan Funded				-	
Need Help?			Check for Updates		ОК

2. Click the **Check Status** button to refresh the *Status* grid. Changes made to pre-defined status notifications will display in the *Status grid*, as well as the pop-up window.

ewart Title Company				×
stewart			Real partners. I	Real possibilities.™
Login Information	Loan Information			
Usemame: trestuser01 Password: ********	Borrower: CoBorrower: Property Address: County: Request Transact	Kennedy, Trevor 2 Kennedy, Lilly 2139 Sugar Court Orlando, FL 32825 Orange	Loan Number: Transaction Type: Loan Type: Loan Amount: Purchase Price: Est Closing Date: Escrow File Number:	180301562 Purchase Conventional 600,000.00 650,000.00 FHBPUR18108334
Order Status Documents Com	munications (1)			
Status	Cor	npleted Date	Updated Date	
Order Confirmed	3/6/	2018 10:06 AM		
Sales Contract Received				
Commitment Completed				E
Curative Cleared				
Settlement Statement in Progress				
Settlement Statement Complete				
Closing Complete				
Wire Received				
Lloan Funded				
Need Help?			Check for Updates	Close

Status/Milestone Definitions

The Statuses/Milestones supported are listed below. This pre-defined list represents the actions/steps configured to support the loan processing transaction workflow, which indicates tasks executed by team associates. All recorded milestones reflected in the *Status* grid represent successful completion of tasks.

- Order Confirmed Notification that the order request has been accepted.
- **Curative Cleared** Notification that the curative process is complete and title is clear.
- Commitment Completed Alert that the commitment has been delivered.
- Settlement Statement in Progress Notifies the Lender that the preliminary settlement statement is being prepared.
- Settlement Statement Complete Notifies the Lender that all modifications to the settlement statement are complete.
- Closing Complete Notification that the loan closing has concluded, and loan documents have been executed.
- Loan Funded Once file is disbursed, this status communicates completion.
- Final Policy Alert users that the final title policy documents are sent.
- Order Cancelled Serves as notification that a cancellation request has been submitted.
- Sales Contract Received (Purchase Transactions only) Notification that the written agreement has been obtained.
- Wire Received (Purchase Transactions only) All funds wired to the title or escrow company.

Documents Tab

The *Documents tab* on the plug-in provides a central location for accessing electronic documents submitted, that are associated with the order. The *Documents tab* outlines document-related activities and records the submission date and time.

Documents currently viewable from the Stewart Title Company Plug-in include:

- Curative Summary
- Disbursement Summary
- ALTA Settlement Statement / Fee Sheet
- Payoff
- Subordination
- Title Commitment
- Final Policy
- Signed Loan Package
- Tax Certificate
- Closing Protection Letter
- Sales Contract
- Property Survey
- Grant Deed
- HOA Certification

Documents display in the *Documents* grid. The documents received are saved and available in the *E-folder*, which tracks document-related activities.

Viewing Document

Click the View Document button to view documents within the E-Folder.

Steps

- 1. From the Documents grid, a list of available documents displays to view. Select the file to view.
- 2. Click View Document.

tewart Title Compa	ny 👘 🍘	þ.	-		
stewart				Real partners.	Real possibilities.™
Login Information		Loan Information			
Usemame: testus Password: ••••••• R Login Successful	emember Me	Borrower: CoBorrower: Property Address: County:	Kennedy, Trevor 2 Kennedy, Lilly 2139 Sugar Court Orlando, FL 32825 Orange	Loan Number: Transaction Type: Loan Type: Loan Amount: Purchase Price: Est Closing Date: Escrow File Number:	180 Purchase Conventional 600,000.00 650,000.00
Request Technica	al Support	Request Transaction	on Support		
Order Status D	ocuments (5)	Communications (1)			
			Send Documents	Resend Document	View Document
	Name		Date		Status
Sent	Settlement Sta	tement.docx			Success
Received	Title Commitme	ent.pdf	3/7/2018 5	5:40 AM	Success
Sent	Wiring Instructi	ions.docx	3/6/2018 4	1:36 PM	Success
Sent	Wiring Instructi	ions.docx	3/6/2018 4	1:31 PM	Success
Sent	Settlement Sta	tement.docx	3/6/2018 4	1:29 PM	Success
Need Help?				Check for Updates	Close

The Document Details screen displays the selected document within E-Folder.





Hover your mouse over the lower-right corner of the screen to expand and enlarge the screen.

Sending Documents

Send documents stored in the E-Folder from the Stewart Title Company Plugin.

Steps

1. From *E-Folder* or File System, click the **Browse** button to select a file.



Documents cannot exceed 10MB in size. An error message displays if the document file size is too large to send.

2. From the Type drop-down, select the Document Type. This field is required.

-	Name	Type	Description	
	Binder2.pdf	1	 1.10	

You will see that the Document Type name also populates the Description field. The Description field is editable.

- 3. Click the **Send Documents** button.
- 4. A pop-up displays, confirming the document was sent. Click OK to continue.
- 5. The status of the sent document(s) displays in the *Documents* grid.

stewar				Real partners	a. Real possibilities.™
Login Infor Usemame: Password: Login Succ	nation testuser01 Test	Loan Information Borrower: CoBorrower: Property Address: County:	Kennedy, Trevor 2 Kennedy, Lilly 2139 Sugar Court Orlando, FL 32825 Orange	Loan Number: Transaction Type: Loan Type: Loan Amount: Purchase Price: Est Closing Date: Escrow File Number	1803 Purchase Conventional 600,000.00 650,000.00
Request T	atus Documents (2)	Request Transacti	Send Document	s Resend Document	t View Document
	Name		Date		Status
Sent	Ning Instruc	tions docx	3/6/20	18 4:31 PM	Success
Sent	Settlement St	atement.docx	3/6/20	18 4:29 PM	Success

Resending Documents

You can also resend documents from the Stewart Title Company Plugin.

Steps

- From the Documents tab, select the **Document Type** from the drop-down.
 You will see that the Document Type name also populates the *Description* field. The Description field is editable.
- 2. Click the Resend Documents button.

ewart Title Company	-						×
stewart					Real partners.	Real possibiliti	es.™
Login Information		Loan Information					
Usemame: testuser0 Password: Reme Login Successful	on and a second	Borrower: CoBorrower: Property Address: County:	Kennedy, Thomas Kennedy, Lilly 100 Sugar Court Orlando, FL 3282 Orange	3	Loan Number: Transaction Type: Loan Type: Loan Amount: Purchase Price: Est Closing Date:	1802 Purchase Conventional 500,000.00 550,000.00	
Request Technical Su	upport	Request Transactio	on Support		Escrow file Nulliber.	105	
			Send Docur	nents	Resend Document	View Docur	nent
N	Name		Date			Status	*
Sent Bi	inder2.pdf			/2018 1:1			
Sent 8M	MB File.pdf		3/22	/2018 1:0	9 PM	Success	Ε
Sent Se	ettlement State	ment.docx	3/22	/2018 12	:39 PM	Success	
Sent Se	ettlement Stater	ment.docx	3/14	/2018 5:0	04 PM	Success	
Sent 8M	MB File.pdf		3/14	/2018 5:0	04 PM	Failure	
Sent 8M	MB File.pdf		3/14	/2018 11	:50 AM	Failure	
Sent Bit	inder2.pdf		3/14	/2018 9:1	I8 AM	Failure	
Sent 81	MR File off		3/14	/2018 9-1	M AM	Failure	-
Need Help?					Check for Updates	Close	

3. A pop-up displays, requesting to confirm that the document should be resent.

Stowar				Real partners	s. Real possibilities.
Login Infom Usemame: Password: Login Succ Request Tr	testuser01	Loan Information Borrower: CoBorrower: Property Address: County: <u>Bequest Transaction</u>	Kennedy, Trevor 2 Kennedy, Lily 2139 Sugar Cout Otlando, FL 32825 Orange on Succont	Loan Number. Transadion Type: Loan Arount: Furchase Price: Est Closing Data: Escrow File Number	1803 Purchase Convertional 500,000.00 550,000.00
Order Sta	stus Documents (2)	Communications (1)			
			Send Documents	s Hesend Document	t View Document
	Name		Send Document: Date	s Hesend Documen	Status
Sent	Name Wiring Instruct	tions docx	Send Documents Date 3/6/20	18 4:31 PM	Status Success
Sert Sert	Name Wing Instruc Settlement St	tions doox atement.doox	Send Documents Date 3/6/20 3/6/20	8 Hesend Documen 18 4:31 PM 18 4:29 PM	Status Status Success Success

4. Click Yes to continue.

5. A pop-up displays, confirming the document was resent.

wart Title C	Company				2
stewar				Real partner	s. Real possibilities.**
Login Infom Usemame: Password: Login Succ	Iestuser01 Remember Me Login essful	Loan Information Borrower: CoBorrower: Property Address: County:	Kennedy, Trevor 2 Kennedy, Ully 2139 Sugar Court Orlando, FL 32825 Orange	Loan Number: Transaction Type: Loan Type: Loan Anount: Furchase Price: Est Closing Date: Escrow File Number	1803 Purchase Conventional 600,000.00 650,000.00
Request Te	echnical Support stus Documents (2)	Request Transactions (1)	on Support		
			Send Documer	ts Resend Documen	t View Document
	Name		Date		Status
Sert	Wring Instruc	tions docx	3/6/2	018 4:31 PM	Success
Sent	Settlement St	atement.docx	3/6/2018 4:29 PM		Success
	The following do	cument(s) were sent is.docx	successfully:		
Need Hes			ОК	Oheck for Updates	Close

The resent document displays in the *Documents* grid. You can also view the document that was sent, or resent by selecting the document, and clicking the **View Document** button.

wart Title Comp	any				10	
stewart					Real partners.	Real possibilities.™
Login Information		Loan Information				
Usemame: testuser01 Password:		Borrower: CoBorrower: Property Address: County:	Kennedy, Trevor 2 Kennedy, Lilly 2139 Sugar Court Orlando, FL 32825 Orange		Loan Number: Transaction Type: Loan Type: Loan Amount: Purchase Price:	1803 Purchase Conventional 600,000.00 650,000.00
Login Successful Request Technic Order Status	Login Successful Request Technical Support Order Status Documents (4)		Request Transaction Support		Est Closing Date: Escrow File Number	:18108:
			Send Do	ocuments	Resend Document	View Document
	Name			Date		Status
Received	Title Commitm	ent.pdf		3/7/2018 5	:40 AM	Success
Sent	Wiring Instruct	tions.docx		3/6/2018 4	:36 PM	Success
Sent	Wiring Instruct	tions.docx		3/6/2018 4	:31 PM	Success
Sent	Settlement Sta	atement.docx				Success
Need Help?					Check for Updates	Close

Viewing Received Documents

You can see the status of sent documents from the **Status** column of the *Documents* grid. You can also see that documents received by the Title Company.

Documents coming into Encompass from the Title Company are marked as **Received** in the first column of the Documents grid.

ewart Title Compar	iy of		57	А	Parl and som	
					Hear partners.	rear possibilities.
Login Information		Loan Information				
Usemame: testuser01 Password: ******** Remember Me Login		Borrower: CoBorrower: Property Address: County:	Kennedy, Trevor 2 Kennedy, Lilly 2139 Sugar Court Orlando, FL 32825 Orange		Loan Number: Transaction Type: Loan Type: Loan Amount: Purchase Price:	1803 Purchase Conventional 600,000.00 650,000.00
Login Successful Request Technical Order Status D	Login Successful Request Technical Support		Est Closing Date: Escrow File Numb ion Support		Est Closing Date: Escrow File Number	:18108:
			Send Do	ocuments	Resend Document	View Document
	Name			Date		Status
Received	Title Commitme	ent.pdf		3/7/2018 5	:40 AM	Success
Sent	Wiring Instruct	ions.docx		3/6/2018 4	:36 PM	Success
Sent	Wiring Instruct	ions.docx		3/6/2018 4	:31 PM	Success
Sent	Settlement Sta	stement.docx		3/6/2018 4	:29 PM	Success
Need Help?					Check for Updates	Close

Communications Tab

The *Communications tab* allows the exchange of notes between the Lender and Stewart. The *Message History* grid on the bottom of the *Communications* tab maintains notes exchanged between the Lender and Stewart for reference.

Under Message History, the following fields display details about your messages:

- Sender For Lenders, the Sender will be the name of the user logged into Encompass. For Title Company users, the Sender's name will be the name of the Title Company, and possibly the name of the user who sent the message (if available.
- Subject A preview of the subject.
- **Message** A preview of the body of the message.
- Date The date and time the message was received.

vart Title Compan	у " Ж		-		-		2
stewart				Real p	artners. I	Real possibilities	
Login Information	Loan I	nformation					
Usemame: testuse Password: Login Successful Request Technical Drder Status Do	x01 Borrow CoBon Proper member Me Ogin County Support Beque souments Communicatio	ver: K rower: K ty Address: 2 0 r: 0 et Transaction : ons (1)	iennedy, Trevor 2 iennedy, Lilly 139 Sugar Coutt Klando, FL 32825 Irange Susport	Loan Num Transaction Loan Type Loan Amou Purchase / Est Closing Escrow File	ber: n Type: : unt: Price: j Date: a Number:	1803 Purchase Conventional 600,000.00 650,000.00 18108	
Conder	C direct			Send M	Message	View Messag	
Lynn Ramsey	General Informatio	n f Here will	e be a separate closing f	or the buyer a	3/6/201	8 4:14 PM	
Stewart Central	iz Note for Lender	r Here is	a note to give you	more infor	3/6/20	18 10:12 AM	
Need Help?			[Check for Up	odates	Close	



To use the Communications tab, the Lender must first successfully submit an order request via the plugin.

Canceling an Order

You can notify Stewart that an order was canceled from the Stewart Title Company plugin-in.



You cannot cancel an order if **Loan Funded** displays in the *Status grid* of the *Status* tab. The **Cancel Order** button in this case is disabled.

Steps

- 1. Log into the Stewart Title Company plug-in.
- 2. From the *Order* tab, click the **Cancel Order** button. A pop-up displays, asking if you are sure you want to cancel the order.

Stewart Title Company				×			
stewart			Real partners. I	Real possibilities.™			
Login Information	Loan Information						
Usemame: [testuser01] Password: I Remember Me Login Successful Request Technical Support Order Status Documents (5) C	Borrower: CoBorrower: Property Address: County: Request Transactit	Kennedy, Trevor 2 Kennedy, Lilly 2139 Sugar Court Orlando, FL 32825 Orange	Loan Number: Transaction Type: Loan Type: Loan Amount: Purchase Price: Est Closing Date: Est Closing Date:	180 Purchase Convertional 600,000,00 650,000,00 8334			
Selected Office	Selected Office Massacree						
Stewart Centralized Title Service 500 North Broadway Suite 900 St. Louis, MO 63102 844-573-5082	es Welcom documer	Welcome back! Please click the 'Check for Updates' button to receive status, document, and message updates.					
Centralized Local Office Locate Office	Place	Place Order Calculate Fees Import Fees					
Need Help?		(Check for Updates	Close			

- 3. Click **Yes** to cancel the order. The *Cancel Order* screen displays.
- 4. From the Cancel Order screen, click the Reason Code drop-down to select the reason for cancelling the order.





If **Other** is selected as a *Reason Code*, you are required to enter a comment in the **Comments** text box to explain the reason for cancelling the order. If you attempt to submit the cancellation without entering in comments, a pop-up displays, stating that this action is required.

5. Click the **Submit** button. The *Messages* text box updates with a confirmation that the order was cancelled.

Stewart Title Company						
stewart	ic	N	Real partners.	Real possibilities.™		
Login Information	Loan Information					
Usemame: testuser01 Password:	Borrower: CoBorrower: Property Address:	Kennedy, Trevor 2 Kennedy, Lilly 2139 Sugar Court	Loan Number: Transaction Type: Loan Type:	180 Purchase Conventional		
Remember Me	County:	Orlando, FL 32825 Orange	Loan Amount: Purchase Price: Est Closing Date:	600,000.00 650,000.00		
Login Successful Request Technical Support	Request Transactio	on Support	Escrow File Number	: 8334		
Order Status Documents (5) (Communications (1)					
Selected Office Stewart Centralized Title Services 500 North Broadway Sute 900 St. Louis, M0 63102 844-573-5082						
Centralized Local Office Locate Office	Place	e Order Cance ate Fees Impor	t Fees			
Need Help?			Check for Updates	Close		

 To verify the cancellation, click the Check Status button from the Order tab. The status Order Cancelled and Completed Date verify the action, date and time the order was cancelled. The cancelled status also displays within Stewart's system.



When an order is canceled, the Calculate Fees and Import Fees buttons are disabled.

Placing an Order After a File is Canceled

If you cancel a file, you can place the order again by following the steps below.

Steps

- 1. Log into the Stewart Title Company plug-in. Notice the Place Order button is now enabled.
- 2. Select the same Office Location or select another Office Location.
- 3. After selecting an Office Location, click **Place Order**. The *Place Order* pop-up displays, asking if you would like to submit a new order.
- 4. Click Yes. Under Messages, a message displays confirming that your order will begin processing.

Stewart Title Company		×
stewart		Real partners. Real possibilities.™
Login Information	Loan Information	
Username: testuser01 Password:	Borrower: Cooper, D CoBorrower: Property Address: 1060 Cape Leander, TX 78641 County: Williamson	Loan Number: 180802115 Transaction Type: NoCash-Out Refinance Loan Type: Conventional Loan Amount: 150,000.00 Purchase Price: Est Closing Date: Est Closing Date:
Request Technical Support Order Status Documents Com	Request Transaction Support	
Selected Office Stewart Centralized Title Service 500 North Broadway Suite 900 St. Louis, MO 63102 844-573-5082	Messages: Thank you for your request. V	We will begin processing your order shortly.
③ Centralized	Place Order	Cancel Order
Local Office Locate Office	Calculate Fees	Import Fees
Need Help?		Check for Lodates Close



When an order is placed again (after it has been canceled) all previous status, documents and communications on that order will be cleared/removed.

Technical or Transactional Support

For technical or transactional support click the links within the Stewart Title Company plug-in for assistance.



A Desktop Email Client application such as Microsoft Outlook must be installed to use the **Request Technical Support** and **Request Transaction Support** links. Otherwise, please contact Stewart Customer Care for assistance at 1.877.800.3132 or <u>CustomerCare@stewart.com</u>.

Request Technical Support

For technical support questions, click the **Request Technical Support** link to access *Stewart Customer Care* via email at <u>CustomerCare@stewart.com</u>. Technical Support can assist with questions regarding login and password information.

Stewart Title Company				×
stewart			Real partners. I	Real possibilities.™
Login Information	Loan Information			
Usemame: [estuser01 Password: V Remember Me Login Login Successful Request Technical Support Order Status Documents (5) Co	Borrower: CoBorrower: Property Address: County: <u>Request Transaction</u> communications (1)	Kennedy, Trevor 2 Kennedy, Ully 2139 Sugar Court Orlando, FL 32825 Orange	Loan Number: Transaction Type: Loan Type: Loan Amount: Purchase Price: Est Closing Date: Est Closing Date:	180 Purchase Conventional 600,000.00 650,000.00 8334
		Send Documents	Resend Document	View Document
Name		Date		Status
Sent Settlement State	ement.docx		8 11:51 AM	Success
Received Title Commitmen	Title Commitment.pdf		8 5:40 AM	Success
Sent Wiring Instruction	Wiring Instructions.docx		8 4:36 PM	Success
Sent Wiring Instruction	Wiring Instructions.docx		8 4:31 PM	Success
Sent Settlement State	Settlement Statement.docx		8 4:29 PM	Success
Need Help?			Check for Updates	Close

Request Transaction Support

For assistance with your transactions related to any title or closing questions, click the **Request Transaction Support** link to request assistance from CTS via email at <u>ctsgpostclosing@stewart.com</u>. CTS can assist with questions regarding the transaction being reviewed.

Thank You

We appreciate your business. We hope you find the *Stewart Title Company* plug-in easy to use for your order needs. For further assistance, contact Stewart Customer Care at 1.877.800.3132 or <u>CustomerCare@stewart.com</u>.