

Stewart Access User Guide

How to Create, Edit, or Void a Policy Jacket | August 14, 2017

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Introduction

The Stewart Access (SA) integration with SoftPro 360 allows you to order Stewart products within ProForm while helping to eliminate data duplication. SoftPro 360 can create a Stewart file that corresponds with information in your ProForm order and will allow you to order Policy Jackets along with CPLs through Stewart. You can freely edit and void these Policy Jackets, if necessary, and of this can be done without having to leave your SoftPro workspace.

Benefits/Features

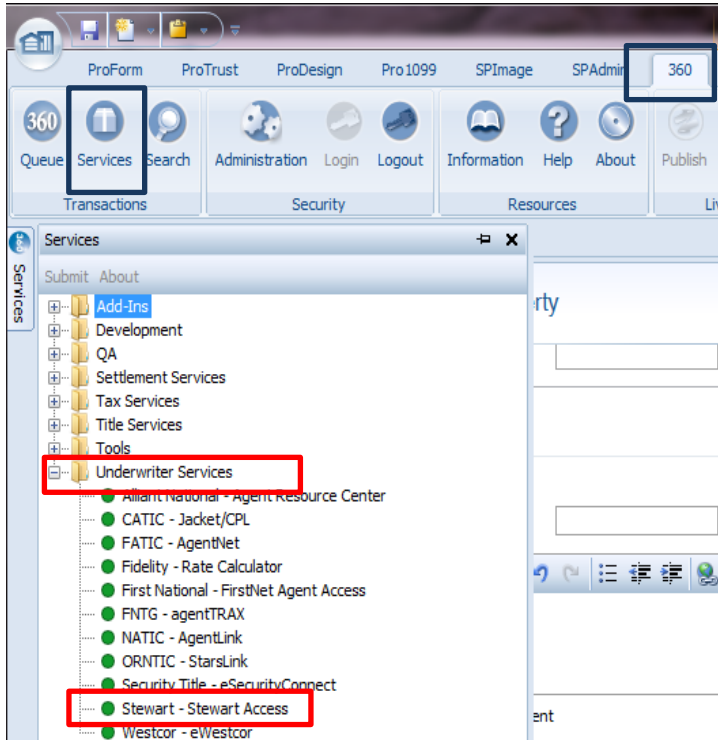
Stewart Access users will be able to:

- Request a Policy Jacket.
- Preview the contents of a Jacket Draft returned from Stewart and make changes before it's submitted again for Issue.
- Accept and attach a Jacket to an order.
- Add and edit both standard and post-policy endorsements.
- Associate a jacket with a prior policy
- Include premium and remittance information on endorsements, additional and special charges, jacket pricing, and CPL pricing.
- Edit an issued Jacket.
- Void an issued Jacket.

Launching Stewart Access

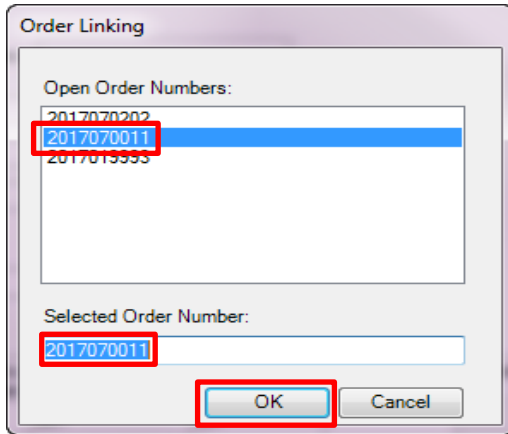
Access From The 360 Services Menu

From the **360** → **Services** menu, double-click **Stewart – Stewart Access** located under the **Underwriter Services** folder. This will open the **Order Linking** screen:



Select a ProForm Order for Your Search

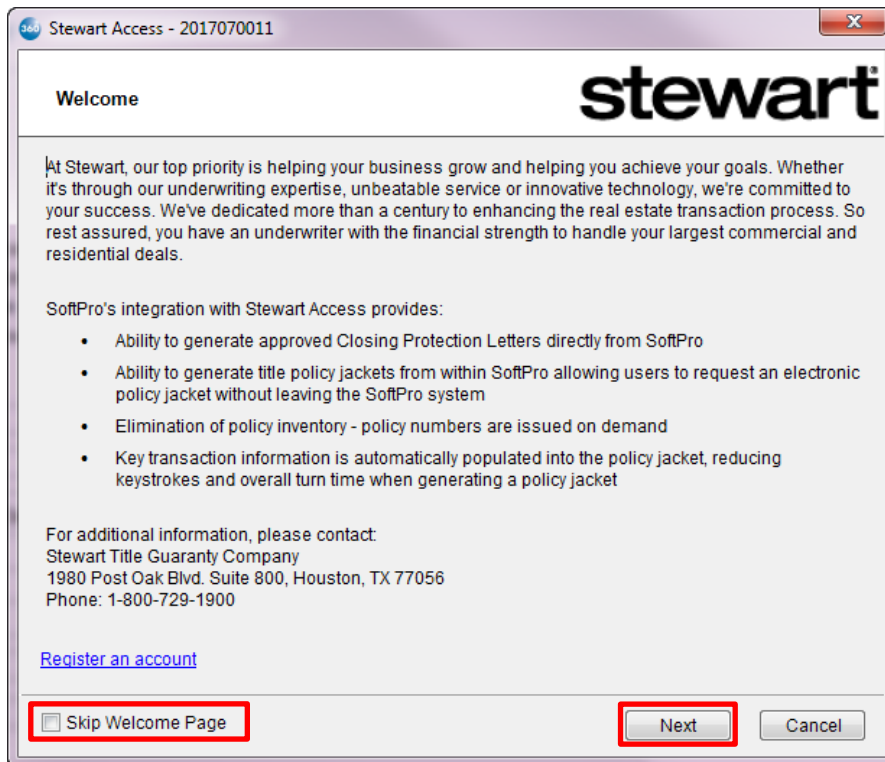
From the **Order Linking** screen, you can specify the order whose contacts you want to search. All the orders that are currently opened in your 360 session will be listed in the **Open Order Numbers** pane. The **Selected Order Number** field will automatically populate with the currently active ProForm order.



1. You may **select an order** from the list which will **automatically display** in the **Selected Order Number** field or you can manually enter the desired order number.
2. Click **OK** to navigate to the **Welcome screen**.

Welcome Screen

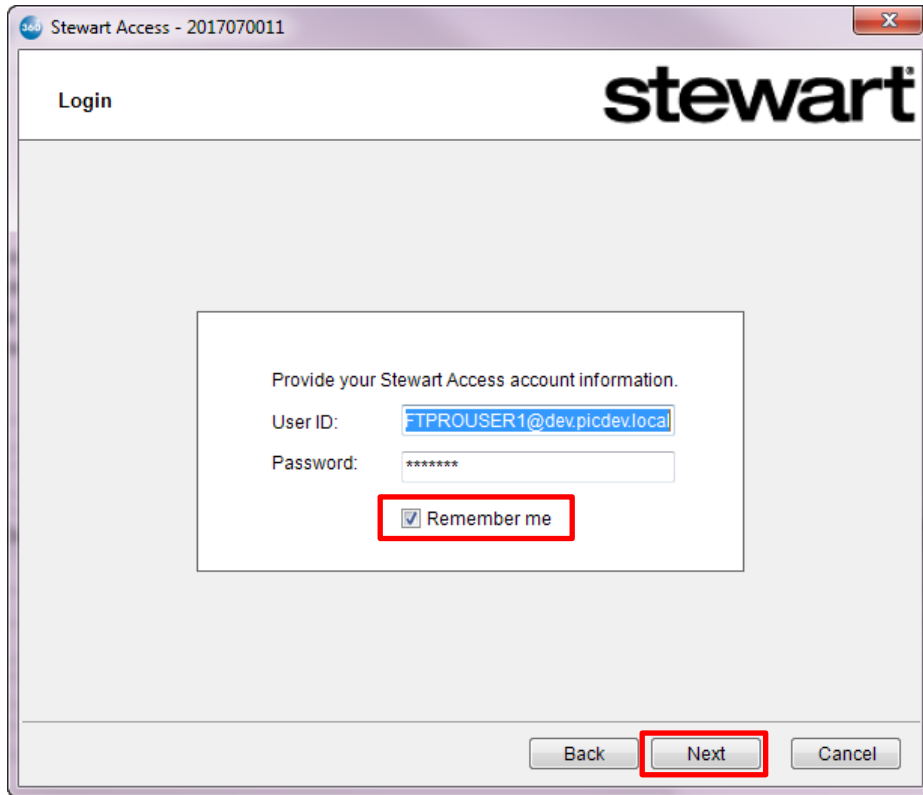
The **Welcome** screen provides a summary of the product & Stewart’s contact information:



- Click **Next** to navigate to the **Login** screen. You may click the **Skip Welcome Screen** checkbox to bypass this screen in future sessions.

Login Screen

The **Login** screen requires you to enter your **User ID** and **Password** provided by Stewart. The **Remember me** checkbox will allow you to automatically log in the next time you launch this product:



Stewart Access - 2017070011

Login

stewart

Provide your Stewart Access account information.

User ID: FTPROUSER1@dev.picdev.local

Password: *****

Remember me

Back Next Cancel

- Click **Next** to continue to the **Title Services** screen.

Title Services Screen

The **Title Services** screen displays a table that lists the products (CPLs and Policy Jackets) that have been created for an order. It also serves as a launcher from which you can choose to add, edit, or cancel a jacket.

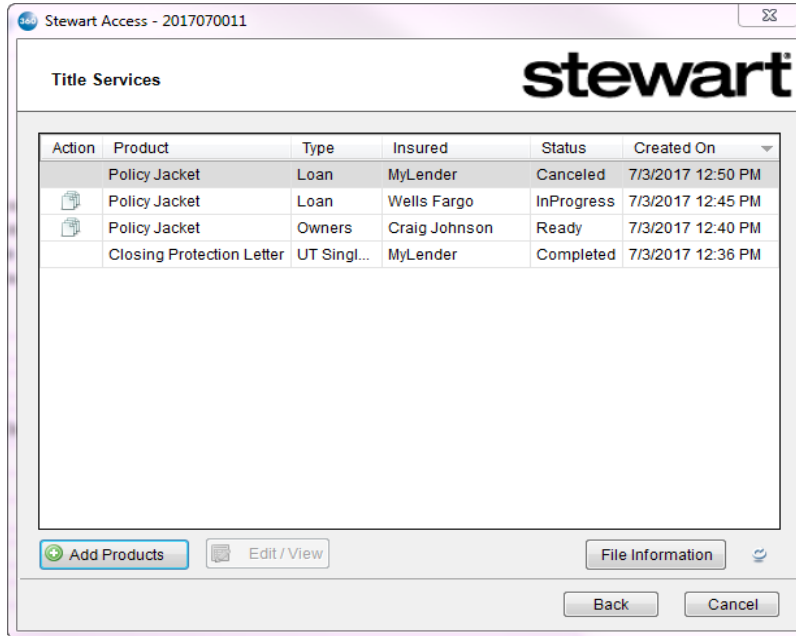


Table Details

The columns in the **Title Services** screen provide the following information:

- Action:
 - **Paper Icon** :
 - The PDF of the jacket has not yet been attached to the order (**Status = Ready**). Clicking the icon will return you to the **Review** screen where you will be able to click **Accept** to attach it to your order.
 - The jacket was submitted to Stewart for a Draft version but has not yet been submitted for issue (**Status = In Progress**). Clicking the icon will return you to the **Review** screen where you will be able to continue and complete the submission workflow.
 - **No icon displayed**:
 - The issued jacket has been voided/canceled (**Status = Canceled**)
 - The issued jacket has been attached to the order (**Status = Completed**).
 - **Red Question Mark** : The transaction encountered an error and the transmission could not be completed (**Status = Rejected**). You can hover over the question mark or double-click it to view a description of the error.

- **Product:** The type of product requested in the integration. For CPLs, the value will always be **Closing Protection Letter**; for jackets, the value will always be **Policy Jackets**.
- **Type:** The jacket type requested i.e., Guarantee, Loan, Owners, etc.
- **Insured:** The name of the lender.
- **Status:**
 - **Ready:** The product was successfully generated by Stewart and received by 360 but it has not been attached to the order.
 - **Completed:** The product was successfully generated Stewart, received by 360, and attached to the order.
 - **Rejected:** An error occurred during the transmission of the transaction.
 - **Canceled:** The transaction was canceled/voided in Stewart.
- **Created On:** Date and time stamp of when the product was initially generated.

To **sort** the data in the table by columns, click on a column heading (except for the **Action** header). Click once to sort in ascending order and again to sort in descending order.

Buttons

- **Add Products:** Displays the **Available Products** screen from which you can submit a CPL or Policy Jacket.
- **Edit/View:** Enables you to **update** or **void** an issued jacket or **add a post policy endorsement** to an issued jacket.
- **File Information:** Property information from your order that will be included in your request to Stewart. See the [File Information](#) section of this guide for details.

Submitting a Policy Jacket

Steps to Creating a Jacket

The following is a high level summary of the steps required to create a policy jacket. These steps are explained in more detail in the following sections of this document.

1. Add required information to the **File Information** screen.
2. Select the **Policy Jacket** product option from the **Available Products** screen.
3. Add information to the **Jacket Information** screen.
4. Add information to the **Rates & Charges** screen.
5. Submit the order to Stewart. In the first submission, the jacket will be saved in **Draft** status and Stewart will remit a PDF of the draft jacket to 360 for your review.
6. Click **Preview** on the **Preview Jacket** screen to view the PDF of the draft jacket.
7. Click **Edit** on the **Preview Jacket** screen to return to the **Jacket Information** and **Rates & Charges** screens.
8. Edit the jacket and/or pricing information as necessary.
9. Submit the order to Stewart with or without changes. In the second submission, the jacket will be **issued** (and will no longer be in Draft status). Stewart will remit the issued jacket to 360 for your review.
10. On the **Review** screen, you may view the PDF of the issued jacket.
11. Click **Accept** to attach the jacket to your order.

File Information

To create a jacket, you must first ensure the required data is provided in the **File Information** screen.

The screenshot shows the 'Information Sent to Stewart Access' dialog box. The 'Property 1' section contains the following data:

| Property 1 | |
|----------------------|---|
| Primary Property | <input checked="" type="checkbox"/> |
| Property Type | Single Family Dwelling |
| Property Address | 3422 Laurelwood Dr., Salt Lake City, UT, 84101 |
| Lot | 68 |
| Block | 60 |
| Section | 200 |
| Subdivision | |
| PIN | 45-22-265 |
| Property Brief Legal | jasldkasldkfjaskldfja;lkdfj;aksdjflkasdjf;lkajsd;flkajsd;flka |

Note: Edits made here will not update your ProForm Order.

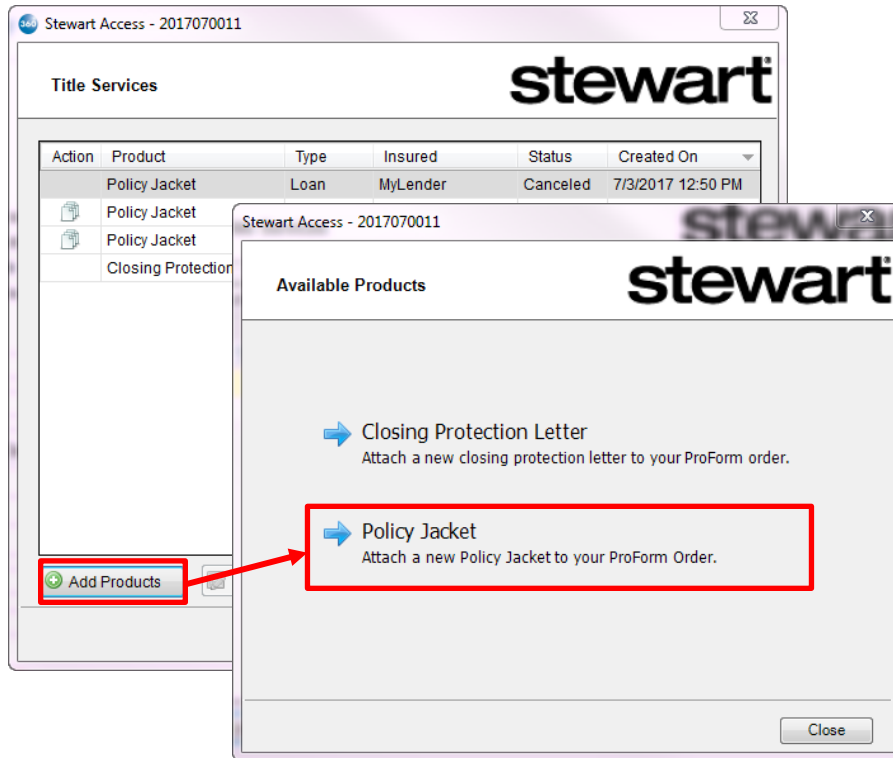
Buttons: OK, Cancel

Background buttons: Add Products, Edit/View, File Information, Back, Cancel

1. On the **Title Services** screen, click the **File Information** button to open the **Information Sent to Stewart Access** screen.
2. You must select at least one **Primary Property** and then a corresponding **Property Type**.
 - **Property Type** is required only when creating a jacket; it is optional for CPLs.
 - **NOTE:** You will only be able to update **Property Type** in the **File Information** screen outside of the Jacket product.
 - The **State** specified in the **Property Address** will be the **jacket state**.

Selecting the Jacket Product

Once you've provided the property information, you can request a jacket from Stewart.



1. Click the **Add Products** button to open the **Available Products** screen.
2. Select **Policy Jacket** to navigate to the **Jacket Information** screen.

Adding Jacket Information

The **Jacket Information** screen allows you to enter information needed to create a new jacket or edit a jacket in Draft status.

Search criteria you send to Stewart to search for lenders in their system

Table that displays lenders from your order and/or from your search results

Jacket Data Required for Request

1. Select the **Effective Date**. You will receive a warning message if the **Effective Date** is not within 30 days (in the past or in the future) of the current date.
2. Select the **Agency** and the **Agency Location**.
3. (Optional) Select the **Transaction Type**.
4. **Property** will display the property information that you specified from the **File Information** screen. You will not be able to edit this field from this screen.
5. Select the **Property County**.
6. Select the **Jacket Type** and the Jacket **Form**.
7. Enter the **Liability** amount.
 - If the **Jacket Type** selected is **Loan** and your order has a loan amount associated with the lender you select, it will display this value in the **Liability** field.
 - If the Jacket Type selected is **Owners** and your order has a sales price associated with the property, it will display this value in the **Liability** field. You will be able to edit this amount.

Lender Tab

The **Lender Tab** (see above) allows you to specify lender information required for a **Loan Jacket Type**. A table will display a list of lenders that you can select from. By default, it displays the lender names in your order and will label them as **ProForm** under the **Source** column.

1. To search for lenders in Stewart's system, you must enter the **ZIP** or the **City, State** and at least **the first 3 letters of the lender name**. The search results will display in the table and will be labeled as **SA** (Stewart Access).
2. Select the lender you want to include by highlighting a name from the list. The **Selection** area will display details of the lender you select from the table.
3. You can optionally enter a **Loan Number**. This field will display the ID of the loan in your order if there is loan associated with the lender you select.
4. If the property **state** in your order uses **Successor Language**, you can click the **Successor Language** checkbox; you may select one of the options from the drop-down provided.

Buyer/Seller Tab

The **Buyer/Seller** tab allows you to view only the names and addresses of the buyers and sellers in your order. You can only edit this information while working in your ProForm order.

Stewart Jacket - 2017070011

Jacket Information

Effective Date: 07/07/2017

Agency: Northern Title Company

Agency Location: Northern Title Company - 11 We

Transaction Type: Sale - New Home / Tract

Property: 3422 Laurelwood Dr., Salt Lake City

Property County: Salt Lake

Jacket Type: Owners

Form: ALTA Owners Policy 6-17-2006

Liability: \$250,000.00

Buyer/Seller

| Type | Name | Address |
|--------|---------------|--|
| Buyer | Craig Johnson | 7899 Copperleaf Rd, Salt Lake City, UT, 84101 |
| Buyer | Beth Johnson | 2399 Canyon Rd, Salt Lake City, UT, 84101 |
| Seller | Jack Wilson | 3422 Laurelwood Dr., Salt Lake City, UT, 84101 |

Next Cancel

Prior Policy Tab

The **Prior Policy** tab allows you to link your new policy to an original/prior policy for refinancing or reissues.

Jacket Information

Effective Date : 07/07/2017
 Agency : Northern Title Company
 Agency Location : Northern Title Company - 11 We
 Transaction Type : Sale - New Home / Tract

Property : 3422 Laurelwood Dr., Salt Lake Cit
 Property County : Salt Lake
 Jacket Type : Loan
 Form : ALTA Loan Policy 6-17-2006
 Liability : \$750,000.00

Search for a Prior Policy :

File Number : 360Test100
 Agency : Northern Title Company
 Prior Policy Number :
 Search

Select or Enter the Prior Policy Information :

Prior Policy : Please Select
 Underwriter : STG
 Date : 07/05/2017
 State : UT
 Prior Policy Number :
 Liability :
 Jacket Type :

Next Cancel

Search criteria you send to Stewart to search for original policies in their system

Search results displayed as options in drop-down

Information displayed based on selection from search results or information you manually enter.

- To search for a policy, enter the **File Number** or the **Prior Policy Number** and click **Search**.
Agency is a read-only field that displays the agency of the current jacket; it must be the same agency of the policy you are searching for.
- If successful, you will be prompted to *Please Select* from the search results in the **Prior Policy** drop-down. Select a policy and the information described in the next step will display.
- Instead of searching for a policy, you can opt to enter the prior policy information manually:
 - Underwriter** – Select **STIC** if New York is the jacket state; otherwise select **STG**.
 - Date** – Select the effective date of the prior policy.
 - State** – Displays the property state of the current jacket you are creating as read-only.
 - Prior Policy Number** – Enter the policy number of the original jacket with which you would like to associate your (policy?) jacket. (I got confused with the policy/jacket terminology/ Are we associating jackets with jackets?)
 - Liability** – Enter the liability amount.
 - Jacket Type** – Select the jacket type.

Details Tab

The **Details** tab will display based on the Jacket **Form** that you select (i.e., Short Form Loan Policies). The fields that display under the **Attribute Name** column in this tab correspond with certain information about your jacket (i.e. Jacket Type, Form, State, etc.).

The screenshot shows the 'Stewart Jacket - 2017070011' application window. The 'Jacket Information' section includes fields for Effective Date (07/07/2017), Agency (Northern Title Company), Agency Location (Northern Title Company - 11 We), Transaction Type (Sale - New Home / Tract), Property (3422 Laurelwood Dr., Salt Lake City), Property County (Salt Lake), Jacket Type (Loan), Form (ALTA Short Form Residential Lc), and Liability (\$750,000.00). Below this, there are four tabs: Lender, Buyer/Seller, Prior Policy, and Details. The 'Details' tab is highlighted with a red box. Underneath the tabs is a table with two columns: 'Attribute Name' and 'Value'.

| Attribute Name | Value |
|----------------------------|-------------------------------------|
| Addendum Attached | <input checked="" type="checkbox"/> |
| Mortgage Amount | \$800,000.00 |
| Mortgage Date | 07/28/2017 |
| State Statutes | 61-2f-222 |
| Policy Time Stamp | 2017-06-15 09:00:00 |
| Borrower Names and Vesting | Tom Jones, Mary Jones |

At the bottom of the window are 'Next' and 'Cancel' buttons.

- Enter information in the **Value** column for each of the **Attributes**.

Adding Rates and Charges Information

Clicking **Next** from the Jacket Information screen will take you to the **Rates and Charges** screen and display four tabs. These tabs allow you to include pricing information in the transaction that you submit to Stewart. They include: **Endorsements**, **Additional Charge**, **Special Charge**, and **Jacket Pricing**.

The screenshot shows a web application window titled "Stewart Jacket - 2017070016". The main heading is "Rates and Charges" with the "stewart" logo. The form contains the following fields:

- Agency: StewartAccess TestAgency
- Liability: \$750,000.00
- Property: 3422 Laurelwood Dr., Murfreesboro, TN, 37133
- Total Premium: \$0.00
- Form: ALTA Loan Policy 6-17-2006
- Total Remittance: \$0.00

Below these fields are tabs for "Endorsements", "Additional Charge", "Special Charge", "Jacket Pricing", and "CPL Pricing". The "Endorsements" tab is active, showing an "Add" button and a table with the following data:

| Action | Endorsement | Actual Premium | Actual Remittance | Trans Code | Li |
|--------|--|----------------|-------------------|------------|----|
| | Proform Endorsement | | Charge | | |
| | LoanPolicy - ALTA Endorsement 10.1-06 (Assignment/Date Down) | | \$0.00 | | |
| | LoanPolicy - ALTA Endorsement 11.2-06 (Mortgage Modification w/ Addition...) | | \$0.00 | | |
| | LoanPolicy - ALTA Endorsement 12-06 (Aggregation) | | \$0.00 | | |
| | LoanPolicy - ALTA Endorsement 13.1-06 (Leasehold) | | \$0.00 | | |

At the bottom of the window are "Back", "Submit", and "Cancel" buttons.

- **Agency, Property, Form, and Liability** information that you specified in previous screens will be displayed as read-only fields at the top of the screen.
- **Total Premium** and **Total Remittance** will display the total amounts of the premium and remittance values provided in the **Rates and Charges** tabs. It will calculate after the jacket has been submitted to Stewart for Draft.

Endorsements Tab

The **Endorsements** tab allows you to add standard endorsements to your jacket. The table at the bottom of this tab displays the endorsements and charges that are currently in the ProForm order.

The screenshot shows two windows from the Stewart Jacket software. The left window is titled 'Stewart Jacket - 2017070016' and displays the 'Endorsements' tab. It includes fields for Agency, Property, and Form, and a table with columns for Action, Endorsement, and Actual Premium. A red box highlights an 'Add' button with a green plus icon. The right window is titled 'Stewart Jacket - 2017070016' and is the 'Add Endorsement' pop-up. It features the Stewart logo and fields for Endorsement (a dropdown menu), Actual Premium, Actual Remittance, Trans Code (a dropdown menu), and Liability. A red arrow points from the 'Add' button in the left window to the 'Add Endorsement' window. Below the main window, a table displays the current ProForm order endorsements.

| Proform Endorsement | Charge |
|---|--------|
| LoanPolicy -ALTA Endorsement 10.1-06 (Assignment/Date Down) | \$0.00 |
| LoanPolicy -ALTA Endorsement 11.2-06 (Mortgage Modification w/ Addition...) | \$0.00 |
| LoanPolicy -ALTA Endorsement 12-06 (Aggregation) | \$0.00 |
| LoanPolicy -ALTA Endorsement 13.1-06 (Leasehold) | \$0.00 |

A red box highlights the table, and a red arrow points to it with the text: "Displays the endorsements in your ProForm order."

1. Click **Add** to display the **Add Endorsement** pop-up window; use this window to enter endorsement data.
2. Select an **Endorsement** from the list in the drop-down.
3. Enter the **Actual Premium** amount for the endorsement.
4. Enter the **Actual Remittance** amount for the endorsement. You may leave this field blank prior to submitting the jacket for Draft, but it is required when you submit the order for issuance.
5. Select a **Trans Code**.
6. (Optional) Enter the **Liability** amount.
7. Click **Save** and the endorsement will display as a row in the grid. Click **Add** again if you want to add another endorsement.

Stewart Jacket - 2017070016

Rates and Charges **stewart**

Agency: Liability:

Property: Total Premium:

Form: Total Remittance:

Endorsements | Additional Charge | Special Charge | Jacket Pricing | CPL Pricing

Add

| Action | Endorsement | Actual Premium | Actual Remittance | Trans Code | Liability |
|--------|---------------------------|----------------|-------------------|-------------|------------|
| | ALTA 4.1-06 Condominiu... | \$100.00 | \$100.00 | Endorsement | \$1,500.00 |
| | ALTA 4.1-06 Condominiu... | \$75.00 | \$20.00 | Endorsement | \$2,000.00 |

Proform Endorsement | Charge

- LoanPolicy - ALTA Endorsement 10.1-06 (Assignment/Date Down) \$0.00
- LoanPolicy - ALTA Endorsement 11.2-06 (Mortgage Modification w/ Addition...) \$0.00
- LoanPolicy - ALTA Endorsement 12-06 (Aggregation) \$0.00
- LoanPolicy - ALTA Endorsement 13.1-06 (Leasehold) \$0.00

Back Submit Cancel

- Click the icon next to the endorsement you would like to edit. You will navigate to the **Edit Endorsement** screen where you can make changes.

Stewart Jacket - 2017070016

Edit Endorsement **stewart**

Endorsement:

Actual Premium:

Actual Remittance:

Trans Code:

Liability:

Save Cancel

- Click the icon next to the endorsement you would like to delete; this will remove the endorsement from the grid.

Additional Charge Tab

If you are working in a State that allows additional charges, you will be able to specify these charges on this screen:

The screenshot displays two windows from the Stewart Jacket software. The main window, titled 'Stewart Jacket - 2017070015', shows the 'Rates and Charges' section with fields for Agency (StewartAccess TestAgency), Property (3422 Laurelwood Dr., Bristol, CT, 06010), and Form (ALTA Loan Policy 6-17-2006). Below these are tabs for Endorsements, Additional Charge, Special Charge, and Jacket Pricing. The 'Additional Charge' tab is active, and a red box highlights an 'Add' button with a green plus icon. A red arrow points from this button to a pop-up window titled 'Add Additional Charge' with the Stewart logo. The pop-up window contains a dropdown menu for 'Additional Charge Type' set to 'Search Fee' and a text input field for 'Fee' containing the value '50'. At the bottom of the pop-up are 'Save' and 'Cancel' buttons. The main window also has 'Back', 'Submit', and 'Cancel' buttons at the bottom.

1. Click **Add** to display the **Add Additional Charge** pop-up window.
2. Select an **Additional Charge Type** from the list in the drop-down.
3. Enter the **Fee** amount.
4. Click **Save** and the additional charge will display as a row in the grid. Click **Add** again if you want to add another charge:

Stewart Jacket - 2017070015

Rates and Charges **stewart**

Agency: Liability:

Property: Total Premium:

Form: Total Remittance:

Endorsements **Additional Charge** Special Charge Jacket Pricing

| Action | Additional Charge Type | Fee |
|--------|------------------------|---------|
| | Search Fee | \$50.00 |
| | Search Fee | \$75.00 |
| | Search Fee | \$35.00 |

5. Click the icon next to the additional charge you would like to edit. You will navigate to the **Edit Additional Charge** screen where you will be able to make changes:

Stewart Jacket - 2017070015

Edit Additional Charge **stewart**

Additional Charge Type:

Fee:

6. Click the icon next to the charge you would like to delete; this will remove it from the grid.

Special Charge Tab

If you are working in a State that allows special charges, you will be able to specify these charges on this screen:

The screenshot displays two windows from the Stewart Jacket software. The main window, titled 'Stewart Jacket - 2017070017', shows the 'Rates and Charges' section with fields for Agency (StewartAccess TestAgency), Property (3422 Laurelwood Dr., Austin, TX, 37133), and Form (T-2 Loan Policy of Title Insurance 1-3-2014). Below these fields are tabs for Endorsements, Additional Charge, Special Charge, and Jacket Pricing. The 'Special Charge' tab is active, and an 'Add' button is highlighted with a red box and a red arrow pointing to the 'Add Special Charge' pop-up window. The pop-up window, also titled 'Stewart Jacket - 2017070017', features the Stewart logo and the following fields: Trans Code (0050 Credit for Commitment Premium), Actual Premium (\$120.00), and Actual Remittance (\$30.00). At the bottom of the pop-up are 'Save' and 'Cancel' buttons. The main window also has 'Back', 'Submit', and 'Cancel' buttons at the bottom.

1. Click **Add** to display the **Add Special Charge** pop-up window.
2. Select a **Trans Code**.
3. Enter the **Actual Premium**.
4. Enter the **Actual Remittance**.
5. Click **Save** and the charge will display as a row in the grid. Click **Add** again if you want to add another special charge.

Stewart Jacket - 2017070017

Rates and Charges **stewart**

Agency: Liability:

Property: Total Premium:

Form: Total Remittance:

Endorsements | **Additional Charge** | Special Charge | Jacket Pricing

| Action | Trans Code | Actual Premium | Actual Remittance | Calculated Remittance |
|--------|---------------------------|----------------|-------------------|-----------------------|
| | 0050 Credit for Commit... | \$120.00 | \$30.00 | |
| | 0020 Foreclosure Credit | \$75.00 | \$12.00 | |

- Click the icon next to the additional charge you would like to edit. You will navigate to the **Edit Special Charge** screen where you will be able to make changes:

Stewart Jacket - 2017070013

Edit Special Charge **stewart**

Trans Code:

Actual Premium:


Actual Remittance:

- Click the icon next to the charge you would like to delete. This will remove it from the grid.

Jacket Pricing Tab

In order to create a jacket, you will be required to enter jacket pricing information.

The screenshot shows the 'Stewart Jacket - 2017070017' application. The main window has a 'Rates and Charges' section with fields for Agency (StewartAccess TestAgency), Property (3422 Laurelwood Dr., Austin, TX, 37133), and Form (T-2 Loan Policy of Title Insurance 1-3-2014). Below this are tabs for Endorsements, Additional Charge, Special Charge, and Jacket Pricing. The 'Jacket Pricing' tab contains a table with columns for Trans Code, Actual Premium, and Actual Remittance. A small icon in the first row of the table is highlighted with a red box, and a red arrow points from it to the 'Add Jacket Pricing' pop-up window. The pop-up window has the Stewart logo and fields for Trans Code (3000 Single Issue), Actual Premium (\$250.00), and Actual Remittance (empty field, highlighted with a red box). Buttons for Save and Cancel are at the bottom of the pop-up window. The main window has Back, Submit, and Cancel buttons at the bottom.

1. Click the  icon to display the **Add Jacket Pricing** pop-up window.
2. Select a **Trans Code**.
3. Enter the **Actual Premium**.
 - To submit for Draft, you will not be required to enter this information. However, when you submit for Issue, the **Actual Premium** and the **Actual Remittance** will both be required.
4. For **Actual Remittance**:
 - If you leave **Actual Remittance** blank and the **Actual Premium** is populated and then submit for Draft, Stewart will calculate this value based on the (Agent's) contract set up in their system. You will then see this calculated amount displayed in the **Actual Remittance** field when you are in Edit mode of the Draft. You will also be able to edit this value.
 - If you populate **Actual Remittance** (whether or not **Actual Premium** is populated) and then submit for Draft, Stewart will save this amount but will not overwrite it with a calculated value.
5. Click **Save** and the charge will display as a row in the grid:

Stewart Jacket - 2017070017

Rates and Charges **stewart**

Agency: Liability:

Property: Total Premium:

Form: Total Remittance:

Endorsements | Additional Charge | Special Charge | **Jacket Pricing**

| Trans Code | Actual Premium | Actual Remittance | Serial Number | Calculated Remittar |
|----------------------------|----------------|-------------------|---------------|---------------------|
| 300 Construction loan p... | \$100.00 | | | |

Back Submit Cancel

Submitting Your Order for Draft

- Once you've provided jacket and pricing information, click **Submit** from the **Rates and Charges** screen. This will send the order information to Stewart. They will save it in their system and create a jacket in Draft status. They will remit the draft jacket to the **Preview Jacket** screen in 360:

Stewart Jacket - 2017070020

Preview Jacket **stewart**

| | Document Name | File Name | File Size (in Kb) | Transferred |
|--|-----------------|---------------------|-------------------|-------------|
| | Jacket-1-5LQ5TH | Jacket-1-5LQ5TH.pdf | 329.35 | 100% |

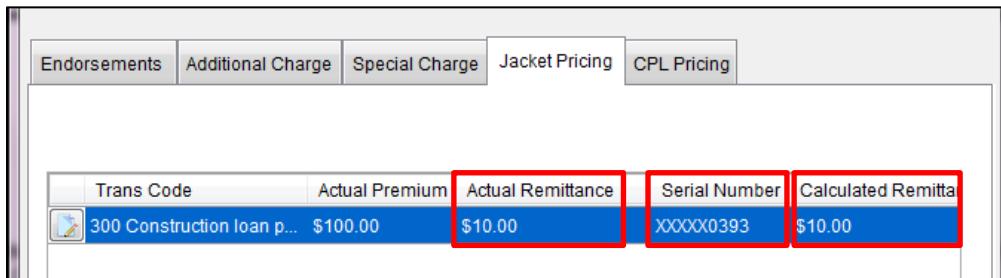
Edit Preview Accept Close

- Click **Preview**. This will display the PDF of the jacket for you to review. It will also enable the **Edit** button.

3. Click **Edit** to return to the same **Jacket Information** and **Rates and Charges** screens where you will be able to walk through the screens and tabs to make changes before you submit a final time to issue the jacket.
4. Update any information as necessary.

Updated Jacket Pricing

In the **Jacket Pricing** tab, if the **Actual Premium** was left blank when it was submitted for Draft and there is a contract set up in Stewart, then the **Actual Premium** and **Calculated Remittance** values will appear in the grid. The **Serial Number** will also be populated with a value that Stewart assigns:



| Trans Code | Actual Premium | Actual Remittance | Serial Number | Calculated Remittance |
|----------------------------|----------------|-------------------|---------------|-----------------------|
| 300 Construction loan p... | \$100.00 | \$10.00 | XXXXX0393 | \$10.00 |

CPL Pricing Tab

If there are one or more CPLs that have been issued in your order, a **CPL Pricing** tab will display in the **Rates and Charges** screen after you've submitted the order to Stewart for a Draft jacket. Each issued CPL will be displayed as a row in a grid and you will be able to update the pricing information for each.

Stewart Jacket - 2017070020

Rates and Charges

Agency: Liability:

Property: Total Premium:

Form: Total Remittance:

Endorsements Additional Charge Special Charge Jacket Pricing **CPL Pricing**

| Actual Premium | Actual Remittance | Serial Number | Calculated Premium | Calculated Remittance |
|----------------|-------------------|---------------|--------------------|-----------------------|
| \$50.00 | \$6.00 | 338499273 | \$50.00 | \$6.00 |

Stewart Jacket - 2017070020


Edit CPL Pricing

Actual Premium:

Actual Remittance:

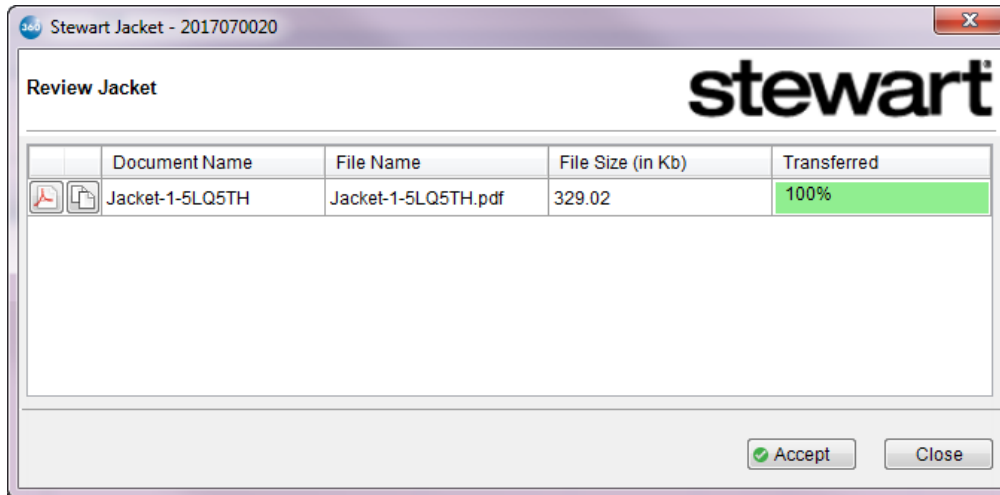
Save Cancel

Back Submit Cancel

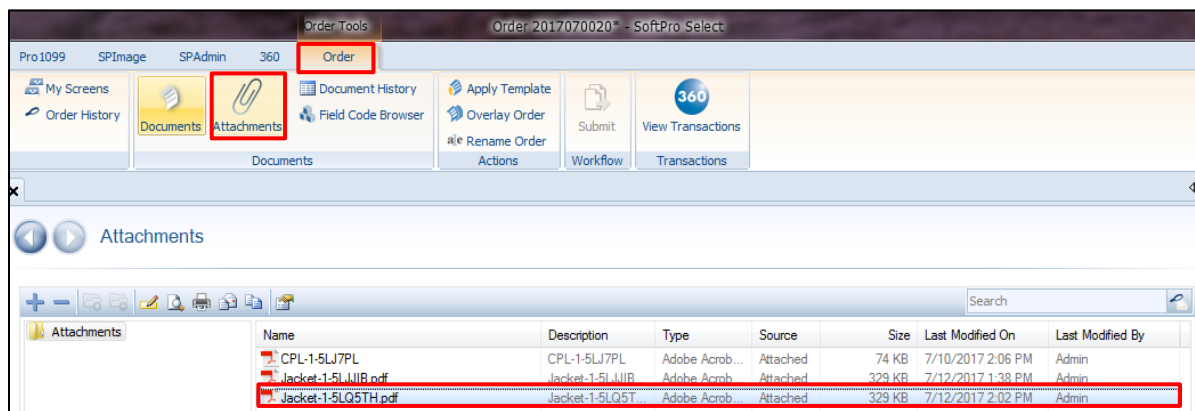
1. Click the  icon next to the issued CPL to display the **Edit CPL Pricing** pop-up window, and you will be able to edit the **Actual Premium** and **Actual Remittance**.
2. Click **Save** and your changes will display in the grid.
 - o **NOTE:** You will not be able to void CPLs from this screen. You must close out of the Jacket product and go to the CPL product in the integration to do so.

Submitting Your Order for Issue

1. Once you have completed editing the Draft version of your jacket, click **Submit**. Stewart will issue the jacket and remit the PDF of the issued jacket to 360.
2. You will be taken to the **Review** screen where you will be able to view the jacket as well as have the ability to copy it to your desktop:



3. Click **Accept** to attach it to your order.
4. Return to your **ProForm** order and click **Attachments** under the **Order** tab. You will see the PDF of the jacket you accepted displayed in the attachment list:

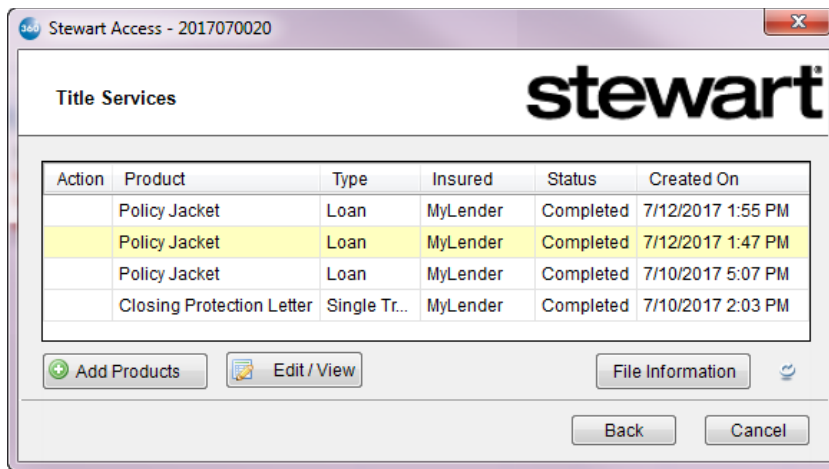


Updating an Issued Policy Jacket

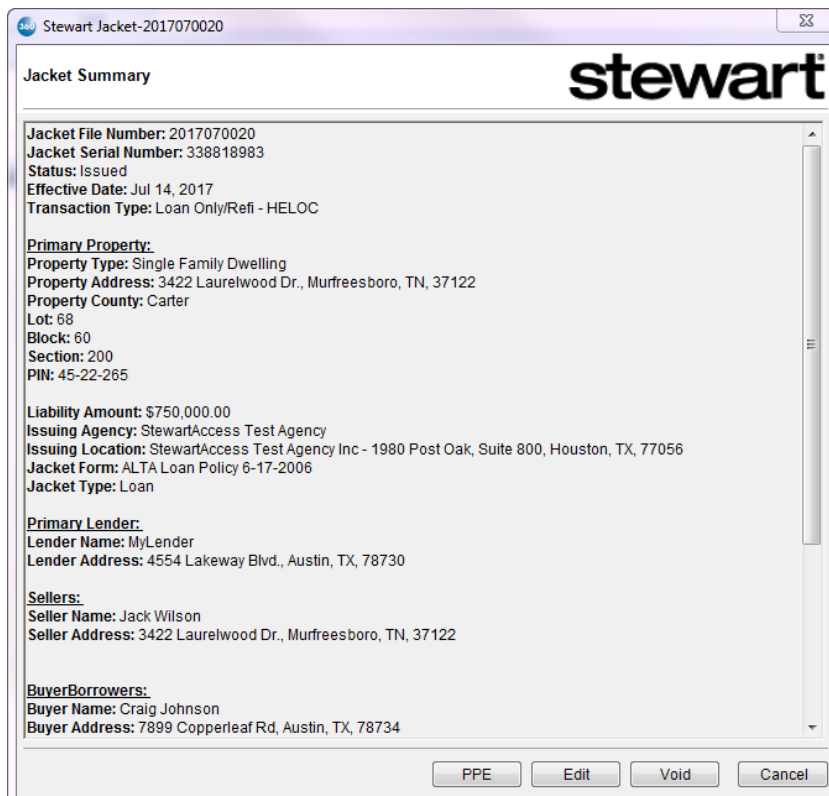
Editing an Issued Jacket

You can edit a jacket once it has been issued and has a 360 status of **Completed**.

1. From the **Title Services** screen, highlight the jacket you would like to edit and click **Edit/View**:



2. You will be taken to a **Jacket Summary** screen where you will be able to view data for the selected jacket:

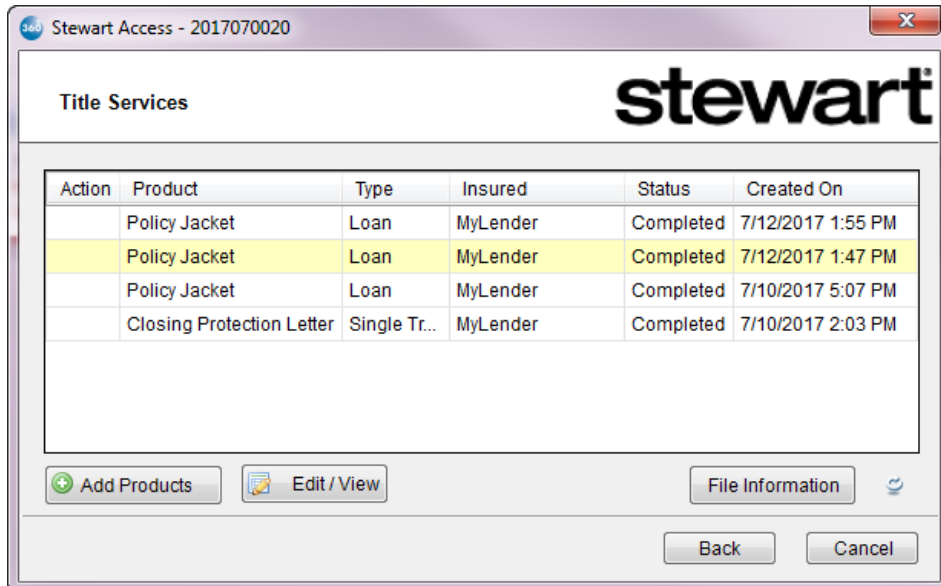


3. Click **Edit** and you will be taken to the same screens used to create the jacket. However, you will only be able to edit certain information:
 - **Property County** (Jacket Information screen).
 - **Prior Policy** Tab – All fields except for **Agency** and **State** (Jacket Information screen).
 - **Jacket Pricing** Tab – **Actual Premium & Actual Remittance** (Rates and Charges screen).
4. Follow steps in outlined in the previous section, **Submitting Your Order for Issue**.

Adding a Post Policy Endorsement (PPE)

You can choose to add endorsements to a jacket after it has been issued and has a 360 status of **Completed**.

1. From the **Title Services** screen, highlight the jacket you would like to add a PPE(s) and click **Edit/View**.



2. You will be taken to a **Jacket Summary** screen where you can view data for the selected jacket:

The screenshot shows a window titled "Stewart Jacket-2017070020" with the Stewart logo in the top right. The main content area is titled "Jacket Summary" and contains the following information:

Jacket File Number: 2017070020
Jacket Serial Number: 338818983
Status: Issued
Effective Date: Jul 14, 2017
Transaction Type: Loan Only/Refi - HELOC

Primary Property:
Property Type: Single Family Dwelling
Property Address: 3422 Laurelwood Dr., Murfreesboro, TN, 37122
Property County: Carter
Lot: 68
Block: 60
Section: 200
PIN: 45-22-265

Liability Amount: \$750,000.00
Issuing Agency: StewartAccess Test Agency
Issuing Location: StewartAccess Test Agency Inc - 1980 Post Oak, Suite 800, Houston, TX, 77056
Jacket Form: ALTA Loan Policy 6-17-2006
Jacket Type: Loan

Primary Lender:
Lender Name: MyLender
Lender Address: 4554 Lakeway Blvd., Austin, TX, 78730

Sellers:
Seller Name: Jack Wilson
Seller Address: 3422 Laurelwood Dr., Murfreesboro, TN, 37122

BuyerBorrowers:
Buyer Name: Craig Johnson
Buyer Address: 7899 Copperleaf Rd, Austin, TX, 78734

At the bottom of the window, there are four buttons: "PPE", "Edit", "Void", and "Cancel".

3. Click **PPE** and you will be taken to the **Post Policy Endorsements** tab (the only tab displayed within the **Post Policy** screen). The read-only fields displayed at the top are the same as what is displayed in the **Rates and Charges** screen. This tab also displays a table that allows you to view the endorsements and their charges that are currently in your ProForm order:

Stewart Jacket-2017070020

Post Policy

Agency : StewartAccess TestAgency Liability : \$750,000.00

Property : 3422 Laurelwood Dr., Murfreesboro, TN Total Premium : \$100.00

Form : ALTA Loan Policy 6-17-2006 Total Remittance : \$0.00

Post Policy Endorsements

Add

| Action | Date | Location | Endorsement | Actual Premium | Actual Remittance | Trans Code |
|--------|------|----------|-------------|----------------|-------------------|------------|
|--------|------|----------|-------------|----------------|-------------------|------------|

Proform Endorsement Charge

| | |
|---|--------|
| LoanPolicy - ALTA Endorsement 10.1-06 (Assignment/Date Down) | \$0.00 |
| LoanPolicy - ALTA Endorsement 11.2-06 (Mortgage Modification w/Additional...) | \$0.00 |
| LoanPolicy - ALTA Endorsement 12-06 (Aggregation) | \$0.00 |

Please wait, creating policy container.. Close

Stewart Jacket-2017070020

Post Policy

Agency : StewartAccess TestAgency Property : 3422 Laurelwood Dr., Murfreesboro, TN Total Premium : \$100.00

Form : ALTA Loan Policy 6-17-2006 Total Remittance : \$0.00

Post Policy Endorsements

Add

| Action | Date | Location | Endorsement | Actual Premium | Actual Remittance | Trans Code |
|--------|------|----------|-------------|----------------|-------------------|------------|
|--------|------|----------|-------------|----------------|-------------------|------------|

Proform Endorsement Charge

| | |
|---|--------|
| LoanPolicy - ALTA Endorsement 10.1-06 (Assignment/Date Down) | \$0.00 |
| LoanPolicy - ALTA Endorsement 11.2-06 (Mortgage Modification w/Additional...) | \$0.00 |
| LoanPolicy - ALTA Endorsement 12-06 (Aggregation) | \$0.00 |

Please wait, creating policy container.. Close

Stewart Jacket-2017070020

Add Post Policy Endorsement

Date : 07/14/2017

Location : StewartAccess TestAgency Inc - 1980 Pos

Endorsement : ALTA 6-06 Variable Rate Mortgage Rev 10-

Actual Premium : \$100.00

Actual Remittance :

Trans Code : 101 Endorsement

Liability :

Save Cancel

Displays list of endorsements in your ProForm order.

4. Click **Add** to display the **Add Post Policy Endorsement** pop-up window where you will be able to enter endorsement data.
5. Select a **Date**.
6. Select a **Location**.
7. Select an **Endorsement**.
8. Enter the **Actual Premium** amount for the endorsement.
9. (Optional) Enter the **Actual Remittance** amount for the endorsement. You may leave this field blank prior to submitting the jacket for Draft, but it is required when you submit the order for issuance.
10. Select a **Trans Code**.
11. (Optional) Enter the **Liability** amount.
12. Click **Save** and the endorsement will display as a row in the grid. Click **Add** again if you want to add another endorsement:

Stewart Jacket-2017070020

Post Policy **stewart**

Agency : StewartAccess TestAgency Liability : \$750,000.00

Property : 3422 Laurelwood Dr., Murfreesboro, TN Total Premium : \$100.00

Form : ALTA Loan Policy 6-17-2006 Total Remittance : \$0.00





Post Policy Endorsements







| Action | Date | Location | Endorsement | Actual Premium | Actual Remittance | Trans Code |
|--------|------------|---------------|---------------------|----------------|-------------------|------------|
| | 07/14/2017 | StewartAcc... | ALTA 6-06 Variab... | \$100.00 | \$35.00 | 101 Endo |
| | 07/14/2017 | StewartAcc... | ALTA 14.3-06 Fut... | \$75.00 | \$50.00 | 505 Endo |

Proform Endorsement Charge

| | |
|--|--------|
| LoanPolicy -ALTA Endorsement 10.1-06 (Assignment/Date Down) | \$0.00 |
| LoanPolicy -ALTA Endorsement 11.2-06 (Mortgage Modification w/Additional...) | \$0.00 |
| LoanPolicy -ALTA Endorsement 12-06 (Aggregation) | \$0.00 |

13. Click the icon next to the endorsement you would like to edit. You will navigate to the **Edit Post Policy Endorsement** screen where you will be able to make changes:

14. Click the  icon next to the endorsement you would like to delete. This will remove the endorsement from the grid:
15. For PPEs, you will submit each endorsement to Stewart directly from this grid. Click the  icon next to the endorsement you want to send to Stewart. Once it's submitted, it will be issued and the icon will become disabled. Once an endorsement is issue, you will only be able to edit  or cancel  it .

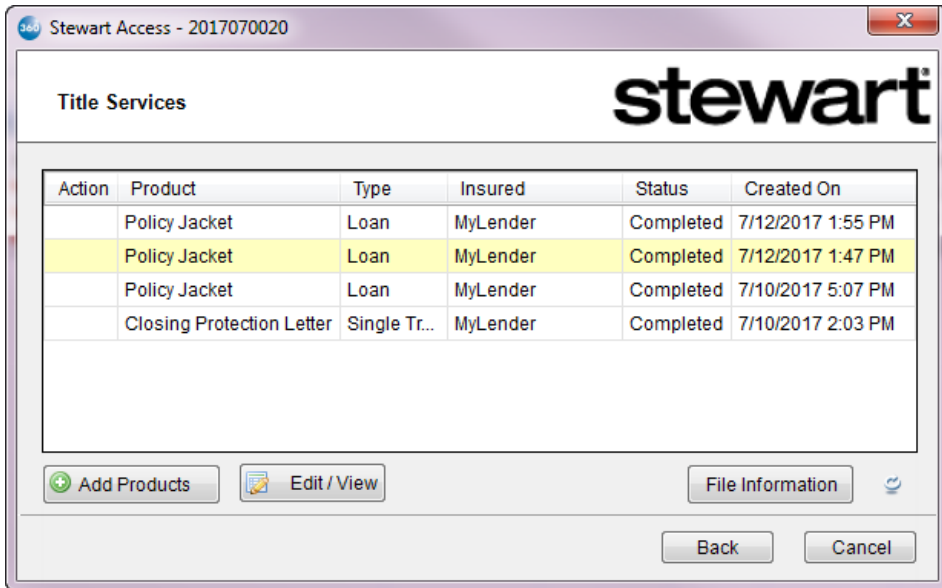
| Action | Date | Location | Endorsement | Actual Premium | Actual Remittance | Trans C |
|---|------------|---------------|---------------------|----------------|-------------------|----------|
|    | 07/14/2017 | StewartAcc... | ALTA 6-06 Variab... | \$100.00 | \$35.00 | 101 Endo |
|    | 07/14/2017 | StewartAcc... | ALTA 14.3-06 Fut... | \$75.00 | \$50.00 | 505 Endo |

16. Click **Close** to return to the **Title Services** screen.

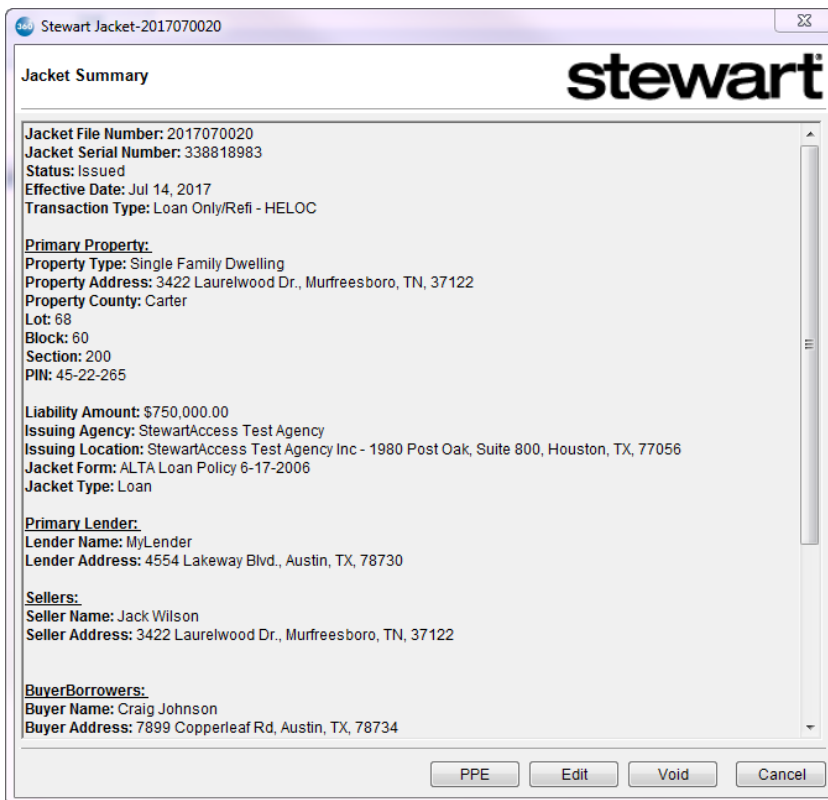
Voiding a Jacket

You can choose to void a jacket once it has been issued and has a 360 status of Completed.

1. From the **Title Services** screen, highlight the jacket you would like to edit and click **Edit/View**:



2. You will be taken to a **Jacket Summary** screen where you will can view data for the selected jacket:



3. Click **Void** and you will navigate to the **Void Jacket** screen:



4. Select a **Void Reason** and click **Void**. A message will confirm that the jacket has been voided:



5. Click **Close** and you will return to the **Title Services** screen where the jacket you voided will now have a **Canceled** status (in 360). You will no longer be able to access this jacket in 360:

