Stewart 2.1
User Guide

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Introduction

The Stewart 2.1 integration with SoftPro 360 will allow you to order Stewart products within ProForm. SoftPro 360 will be able to create a Stewart file corresponding to information in your ProForm order and enable you to order Policy Jackets along with CPLs through Stewart. Additionally, you'll be able update a CPL and void either a CPL or Policy Jacket. All of this can be done without having to leave your SoftPro workspace, helping to facilitate a more efficient workflow by reducing or eliminating the duplication of data.

Launching Stewart 2.1

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:
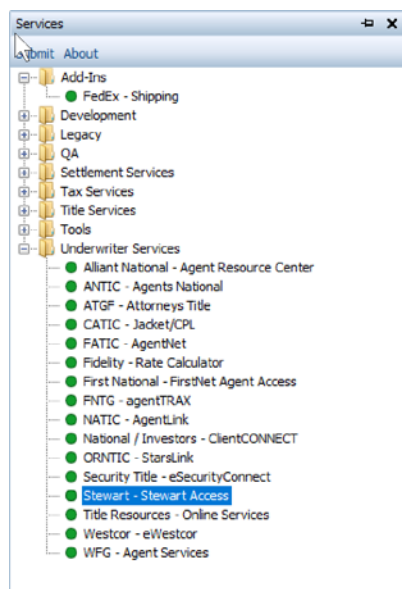

Figure 1 - SoftPro 360 Services Menu

Order Linking

From the **Order Linking** screen, select the ProForm order that will be sent to Stewart:
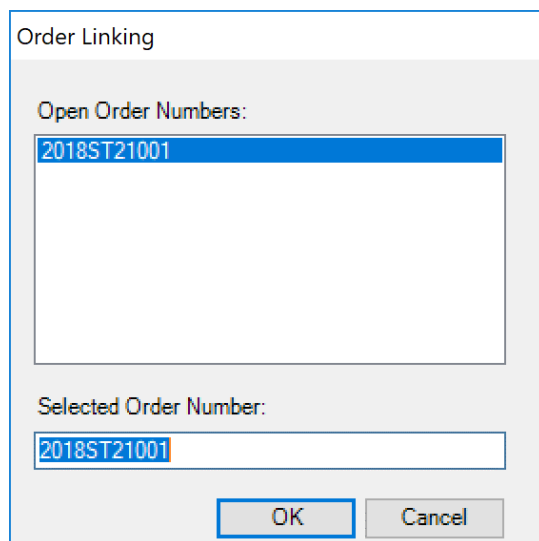
Figure 2 - Order Linking Screen

All orders that are currently opened will be listed in the Open Order Numbers pane. The selected Order Number field will populate with the current active ProForm order. You may select an order from any of the open orders, or you may choose to overwrite the Selected Order Number field with an order that is not currently open. Once you have confirmed an order to link, click **OK** to continue to the Login screen.

Logging In

The **Login** screen requires you to enter a valid **Stewart Access user name** and **password**. Check **"Remember Me"** to log in automatically when you launch the product in future sessions. Click **Login** to continue to the Issuing Office screen:

Figure 3 - Login Screen

NOTE: If you do not have a Stewart Access user name and password or are experiencing issues with your given credentials, please contact your Stewart Agency Representative.

Submitting an Order

Title Insurance Services Screen

From the **Title Insurance Services** screen, you'll be able to:

- View a list of the CPLs and/or Jackets that you've ordered
- Order a CPL or Jacket
- Revise an issued product
- Void an issued product
- View order data that you're sending to Stewart with your request
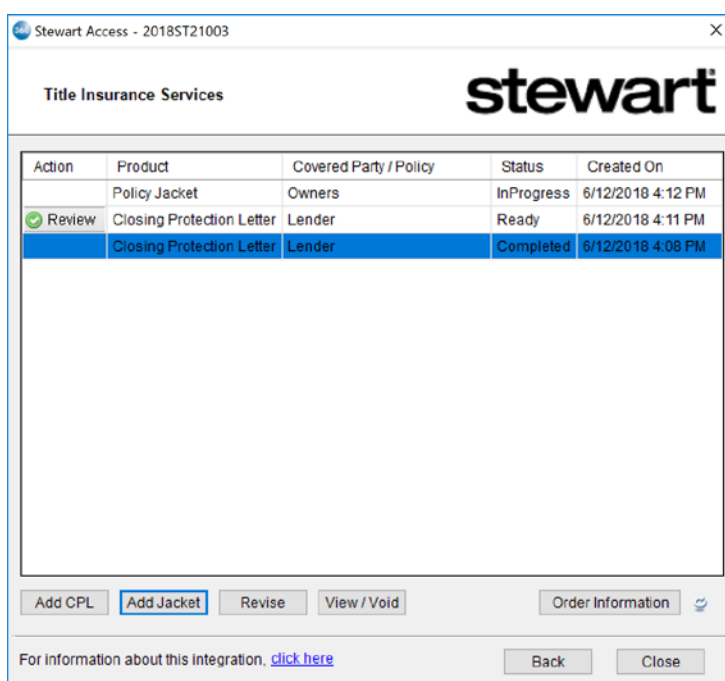
Figure 4 – Title Insurance Services Screen

- A table will display the products you've ordered from Stewart and will provide the following information for each CPL and Jacket:

    Action:

    o **Review** : 360 has received the CPL or Jacket from Stewart (**Status** = *Ready*) and it is ready for the user to review and accept. Clicking the icon will take you to the **Review** screen where you will be able to view and accept the product.

    o **Red Question Mark** ❗: The request you submitted to Stewart encountered an error and no product was created. You can hover over the question mark or double-click it to view a description of the error.

Product: The type of product requested from Stewart Access. For CPLs, the value will always be **Closing Protection Letter**. For Jackets, the value will always be **Policy Jacket**.

Covered Party/Policy: The covered party selected for the CPL **(Lender, Buyer, or Seller)** or the type of Policy Jacket selected (**Simultaneous, Owners or Loan**).

Status:

- o *In Progress*: Your request has been successfully submitted to Stewart.
- o *Ready*: 360 has received the remitted document from Stewart and is ready for you to view and accept (attach to your order).
- o *Completed*: The remitted product was accepted and attached to the order.
- o *Rejected*: An error occurred with the submission of the request.
- o *Canceled*: The product was voided.

Created On: Date and time stamp of when the product was generated.

- To **sort** the data, click on a column heading. Click once to sort in ascending order and click again to sort in descending order.
- The **Add CPL** or **Add Jacket** button allows you to order a CPL or Jacket, respectively. Either action will navigate to the **Agency** screen.
- To **revise** an issued product, highlight a transaction that is in *Completed* status and click the **Revise** button.
- To **cancel** an issued product, highlight a transaction that is in *Completed* status and click the **Void** button.
- To view the order data that we are sending to Stewart Access, click the **Order Information** screen.

Order Information Screen

The **Order Information** screen will show a summary of the parties (buyers, sellers and lenders), policy information and property data in your file that will be sent to Stewart. If you have more than one property in your order, then you can specify which one you want to include in your request. By default, the first property listed in your order will be selected.
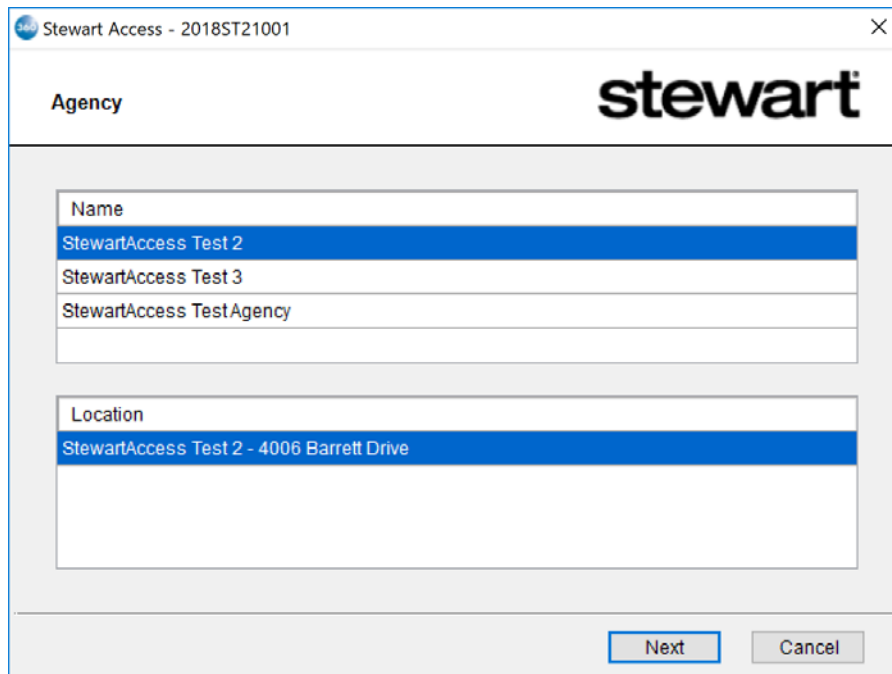
Figure 5 Order Information Screen

Selecting an Agency

After selecting to add a CPL or add a jacket from the Title Insurance Services screen, you will navigate to the **Agency** screen. On this screen, you can choose an agency and agency location for the ProForm order you selected. Selecting an agency name from the first grid will automatically display the corresponding locations in the grid below it. After selecting a location, click **Next** to navigate to either the **Closing Protection Letter** screen or the **Policy Jacket – Selection** screen, depending on the action you selected on the Title Insurance Services screen. If there is only one agency with a single location, then you will bypass the Agency screen and navigate directly to the next screen.

Figure 6 – Agency Screen

Adding a CPL

If you have opted to add a CPL, clicking **Next** from the Agency screen will navigate to the Closing Protection Letter screen.

Figure 7 – Closing Protection Letter Screen

- Select the covered party of the CPL you are requesting. If you select Lender, you will be required to select a lender from the drop-down, which includes the lender(s) that are in your order. By default, it will pre-select the first lender listed in your order.
- A list of forms that you will need to select from will display based on the covered party you selected. Select a form from the list.
- The Lender Successor Language will pull from your order and display this value if it exists. You will also be able to edit this information. If there is no lender in your order, this field will not be editable.
- You may have an option to select between Secondary Agency and Approved Attorney as an Additional Party in your request. There may however be an instance where one or both are not available as options, or that one may be a required selection. In this case, that option would be pre-selected.
- Click **Submit** to send your data to Stewart. If there is required information that was not provided or if you've selected an Additional Party, then you will be taken to the Stewart Access site, where you can complete your request and issue the CPL.

Adding a Jacket

If you have opted to add a jacket, you will navigate to the **Policy Jacket - Selection** screen from the Agency screen.
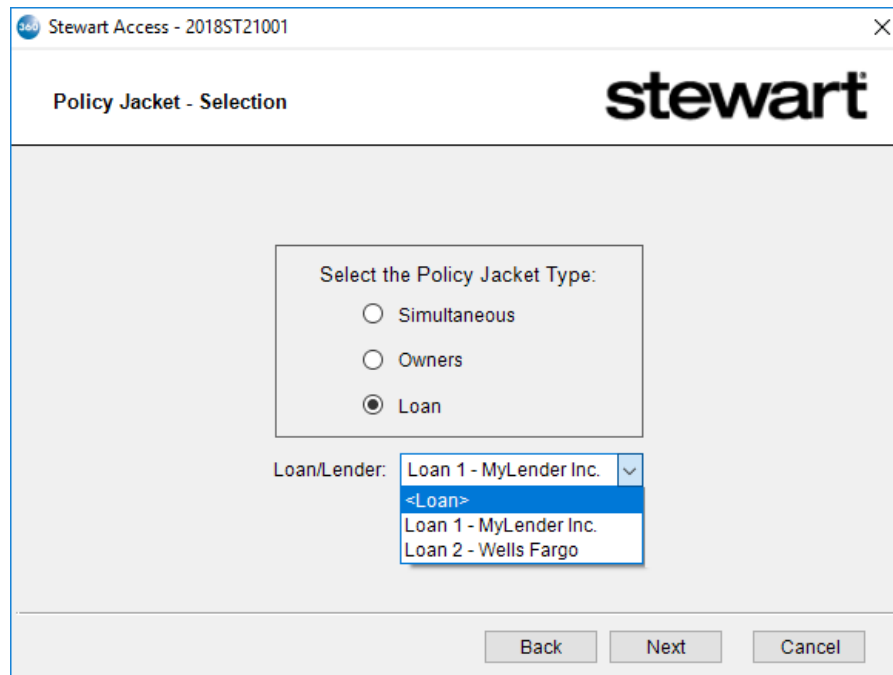

Figure 8 – Jacket Selection Screen

- Select the type of jacket you are requesting. If you select **Simultaneous** or **Loan**, then you are required to select an option from the **Loan/Lender** drop-down, which includes the loan policy(s) and the associated lender in your order. If there are multiple loan polices in your order, they will be numbered (e.g., Loan 1, Loan 2, etc.) in the order that it is listed in your ProForm order.
- Click **Next** to navigate to the appropriate Policy Jacket screen. If you selected **Owners**, you will navigate to the **Policy Jacket – Owners** screen. If you selected **Loan**, then you will navigate to the **Policy Jacket – Loan** screen, respectively.
- If you select **Simultaneous**, then you will first be taken to the Policy Jacket – Owners screen, and then upon clicking Next, you will navigate to the Policy Jacket – Loan screen before submitting your data to Stewart.

Owners and Loan Policy Jacket Screens

Figure 9 – Owners Jacket Screen

Figure 10 – Loan Jacket Screen

- Select a form from the **Forms** list.
- The **Liability** amount will pull from your order and will display it if it exists. You will also be able to edit this information.
- On the Loan screen, the **Lender Successor Language** will pull from your order and display this value if it exists. You will also be able to edit this information. On the owners screen, however, this field will not be editable.
- You may be able to specify **Special Charges** and/or **Additional Charges** in your request. There may be an instance where one or both are not available as options.
- Click **Submit** to send your data to Stewart. If there is required information that was not provided, or if you've selected one of the Charges, then you will navigate to the Stewart Access site where you can complete your request and issue the jacket from there.
- On the loan screen, if there is additional information that you can add based on the loan form you selected, a **Next** button instead of Submit will display, which will take you to the **Form Details** screen.

Form Details Screen

Figure 11 – Form Details Screen

- Based on the form you selected on the Policy Jacket – Loan screen, there may be additional data that you can provide on the **Form Details** screen. You may also see values already prepopulated with those from your order if it exists.
- If you selected a short form, you will see a Next button, which will take you to the **Endorsements** screen. If you did not select a short form, then a **Submit** button will be available instead for you to send your data to Stewart.

Endorsements Screen

Figure 12 – Endorsements Screen

- If you selected a short form from the **Policy Loan – Jacket** screen, you will be able to select one or more endorsements on the **Endorsements** screen. Clicking **Submit** will send your data to Stewart Access.

Submitting a Request

Once you submit your request, you may be redirected to the Stewart Access website where you will need to provide additional information (fields highlighted in red below) that is required before the product can be issued. After clicking **Issue**, you can return to 360, where Stewart will send the requested product. This transaction will display on the Title Insurance Services screen and will have a status of **In Progress** until 360 receives the remit.

Figure 13 – Sample Stewart Access Screen

The transaction status in 360 will change from **In Progress** to **Ready** once the product has been remitted to 360, in which case you will be able to click the [Review] icon next to the transaction to navigate to the Review screen.
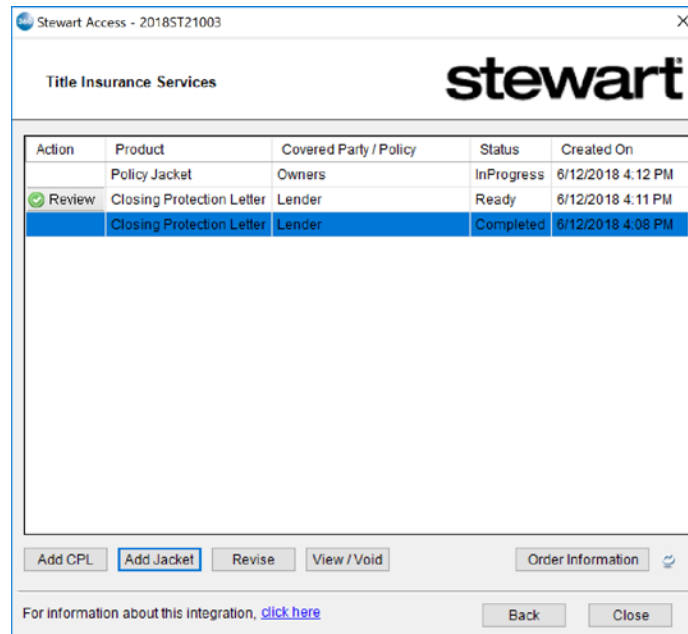

Figure 14 – Transaction with Ready Status/Review Icon

From here, you can view the document as well as copy it to your desktop. You can eventually choose to **Accept** it, which will attach it to your order. If you **Close** the screen without accepting it, it will not attach your order. However, the transaction will remain in a *Ready* status and you will be able to return to the Review screen to accept it at a later time. If you do, it will not overwrite the existing attachments in your order.

Figure 15 – Review Screen

Revising a CPL

You may revise a CPL that has already been issued in which the product's status is *Completed*. To do this, there must also be no jackets issued for the order.

NOTE: **This version (2.1) of the integration does not currently support Jacket revisions**.

- On the Title Insurance Services screen, highlight a CPL from the list of products that you wish to revise.
- Click the **Revise** button. The status of the existing CPL transaction will change to *Canceled,* and you will navigate to the Agency screen where you can begin to follow the same workflow of screens to request a new CPL.

Voiding a CPL or Jacket

You can void a CPL or Jacket if it has been issued and has a 360 status of *Ready* or *Completed*.

- On the Title Insurance Services screen, highlight a CPL or jacket in a *Completed* status that you wish to void.
- Click the **View/Void** button. You will then be taken to the Void screen for CPLs if you are voiding a CPL and to the Void screen for jackets if you are voiding a jacket. Information on the product you selected will display on this screen.
- On either Void screens, you will need to select your reason for canceling this product and then click the **Void** button on this screen. This will send this information to Stewart and the status of the transaction in 360 will change to *Canceled*.

Figure 16 – Void Screen