

Stewart – Underwriter CPL & Policy Jackets

Purpose: This user guide demonstrates how to use the Stewart Title Guaranty Company integration to generate and void policy jackets and closing protection letters from within ResWare. When this integration is used, the documents are attached to a file without having to go to the underwriter’s website.

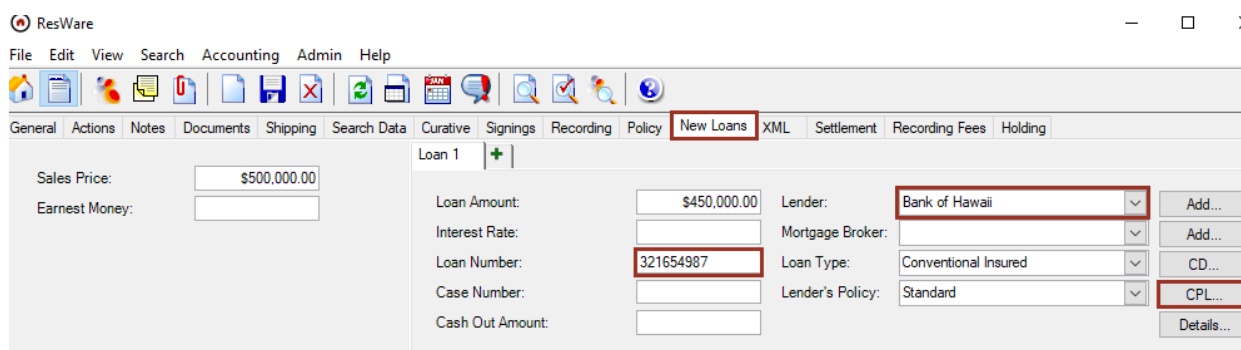
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Requesting a CPL on a file

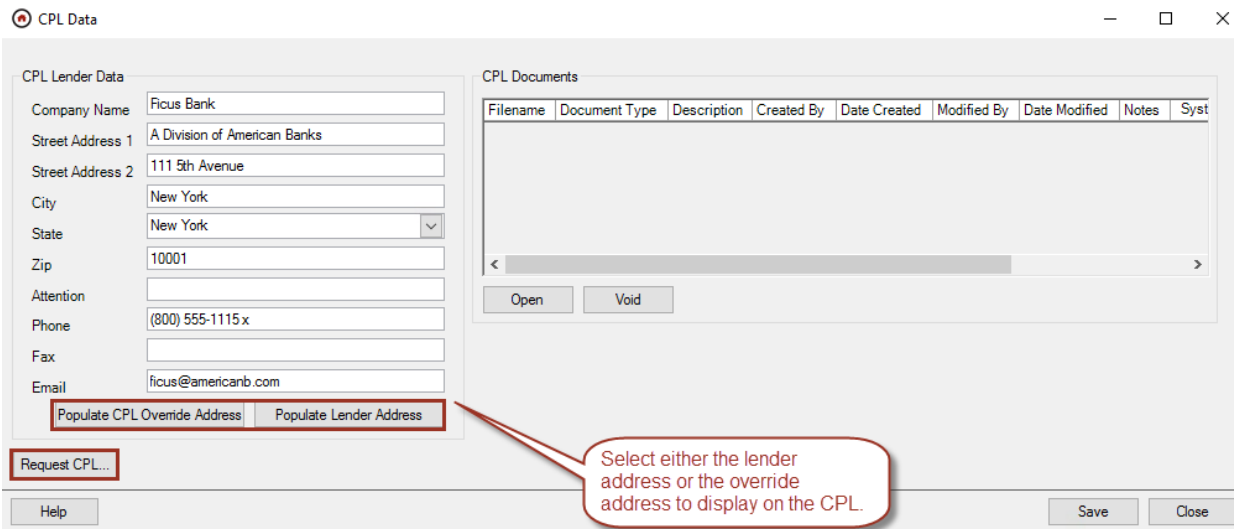
File/New Loans

- When requesting a lender CPL, select a lender. Fill in the field for the loan number if it should be included on the CPL.
- Click the **CPL** button.



The screenshot shows the ResWare application window with the 'New Loans' tab selected. The 'Loan 1' section is active, displaying various loan details. The 'Loan Number' field is populated with '321654987'. The 'Lender' dropdown is set to 'Bank of Hawaii'. The 'Lender's Policy' dropdown is set to 'Standard'. A red box highlights the 'CPL...' button in the bottom right corner of the loan details section.

- Verify the *CPL Lender Data* information is correct. Click **Populate CPL Override Address** and **Populate Lender Address** to toggle between the lender’s CPL override and partner addresses. Any additional changes needed can be made here.
- Click **Request CPL**.



- Enter the **Username** and **Password** provided by Stewart Title and click on the **Login** button.
 - The username and password will be retained for each user after it is entered the first time.
- Enter a **CPL Date**. This defaults to the current date and can be set to up to seven days in the future
- Select a **Stewart Agency**. This selection will populate the **Agency Group** and **Agency Location** options available.
- Select an **Agency Group**.
- Select an **Agency Location**.
- The **Property Type** defaults to *Residential – General*. This can be changed to *Commercial – General*.
- Select a **Covered Party**. This will populate the **CPL Type** options available and allow selection of additional parties.
- Select the **CPL Type**.
- Select an **Approved Attorney**, **Secondary Agency**, or **Settlement Company**, if needed.
 - Clicking on the **Search** button for each allows the user to search for and select a company.
- Select the **Successor Language**. If different verbiage is needed, type the language in the blank row.
- Verify the information in the *Buyer Data* and *Seller Data* sections. If names to be updated, click **Close** and make the corrections to the buyer/seller located in the *General* tab.
- Click **Generate**.



Stewart CPL Questions

Username: Login

Password:

CPL Date:

Stewart Agency:

Agency Group:

Agency Location:

Property Type:

Covered Party:

CPL Type:

Approved Attorney: Search

Secondary Agency: Search

Settlement Company: Search

Successor Language:

Buyer Data

Prefix	First Name	Middle Name	Last Name	Suffix	Full Name	ResWareID
	Hannah		Gibbons		Hannah Gibbons	8739
	Matthew		Gibbons		Matthew Gibbons	8739

Count 2

Seller Data

Prefix	First Name	Middle Name	Last Name	Suffix	Full Name	ResWareID
	Justin		Brennan		Justin Brennan	8745
	Angela		Brennan		Angela Brennan	8745

Count 2

Help

The CPL is created.

- Click **OK** on the success message.

Stewart CPL Response



CPL document(s) request successful. The following document(s) have been added to the file:

- CPL_12345_INSingleTransactionCPLLenderPurchaserB...

The created CPL document(s) will be displayed in the *CPL Documents* grid on the *CPL Data* panel and in the *Documents* panel.



CPL Data

CPL Lender Data

Company Name: Ficus Bank
 Street Address 1: POB 1515
 Street Address 2:
 City: Schenectady
 State: New York
 Zip: 12345
 Attention:
 Phone:
 Fax:
 Email:

Populate CPL Override Address Populate Lender Address

Request CPL...

CPL Documents

Filename	Document Type	Description	Created By	Date Created
CPL_20181104_SingleTransactionCPL.pdf	CPL	Lender	ResWare Server	11/05/2018 06:31 AM

Open Void

ResWare

File Edit View Search Accounting Admin Help

General Actions Notes Documents Shipping Search Data Curative Signings Recording Policy New Loans XML Settlement Receivables Bills Trust Recording Fees Remitt

Show: Snapshots Shipping Labels Hidden Filter:

Filename	Document Type	Template	Policy	Description	Internal	Approved	Secured	Created By	Date Created	Modified By	Date Modif
CPL_20181104_SingleTransactionCPL.pdf	CPL			Lender	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ResWare Server	11/05/2018 06:31 AM		

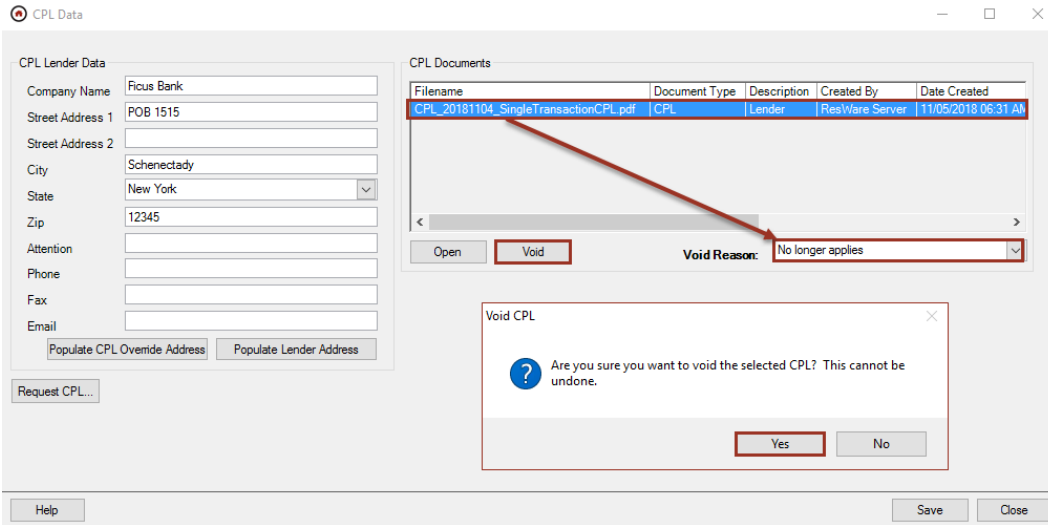
Attach... Create... Open Send... Combine... Extract... View Notes Associate... Edit Info... Delete Manual Sort Up Down

Help

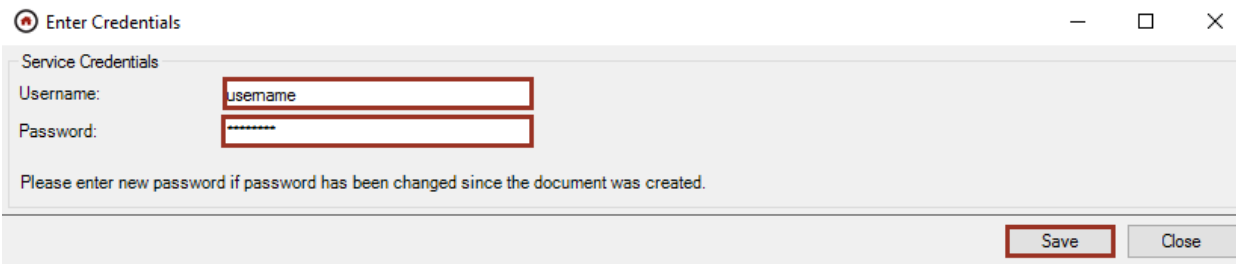
Voiding a CPL on a file

File/New Loans/CPL

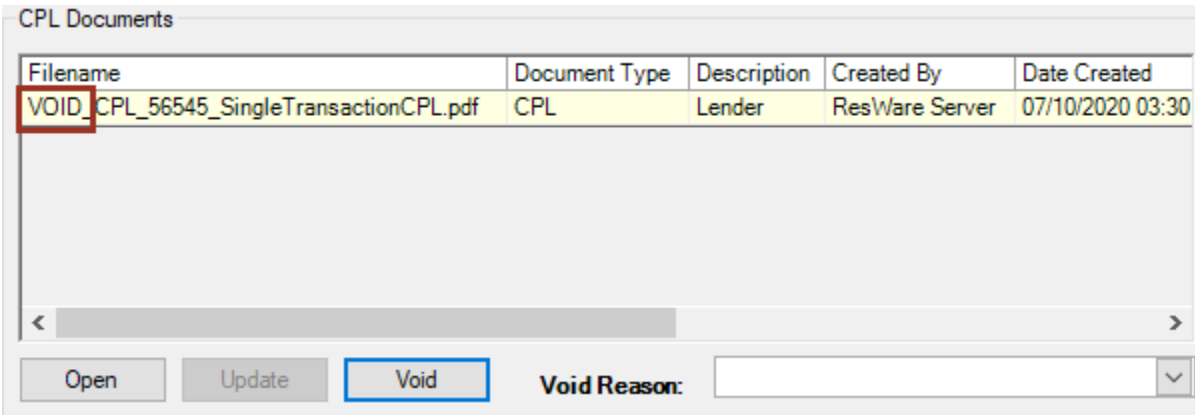
- Select the CPL document.
- Select the **Void Reason** and click on **Void**.
- Confirm the CPL should be voided by clicking **Yes**.



- Enter or verify that the populated **Username** and **Password** are correct and click **Save**.



The CPL is voided. Click **OK** on the success message. The voided CPL filename will be updated to contain **VOID**.

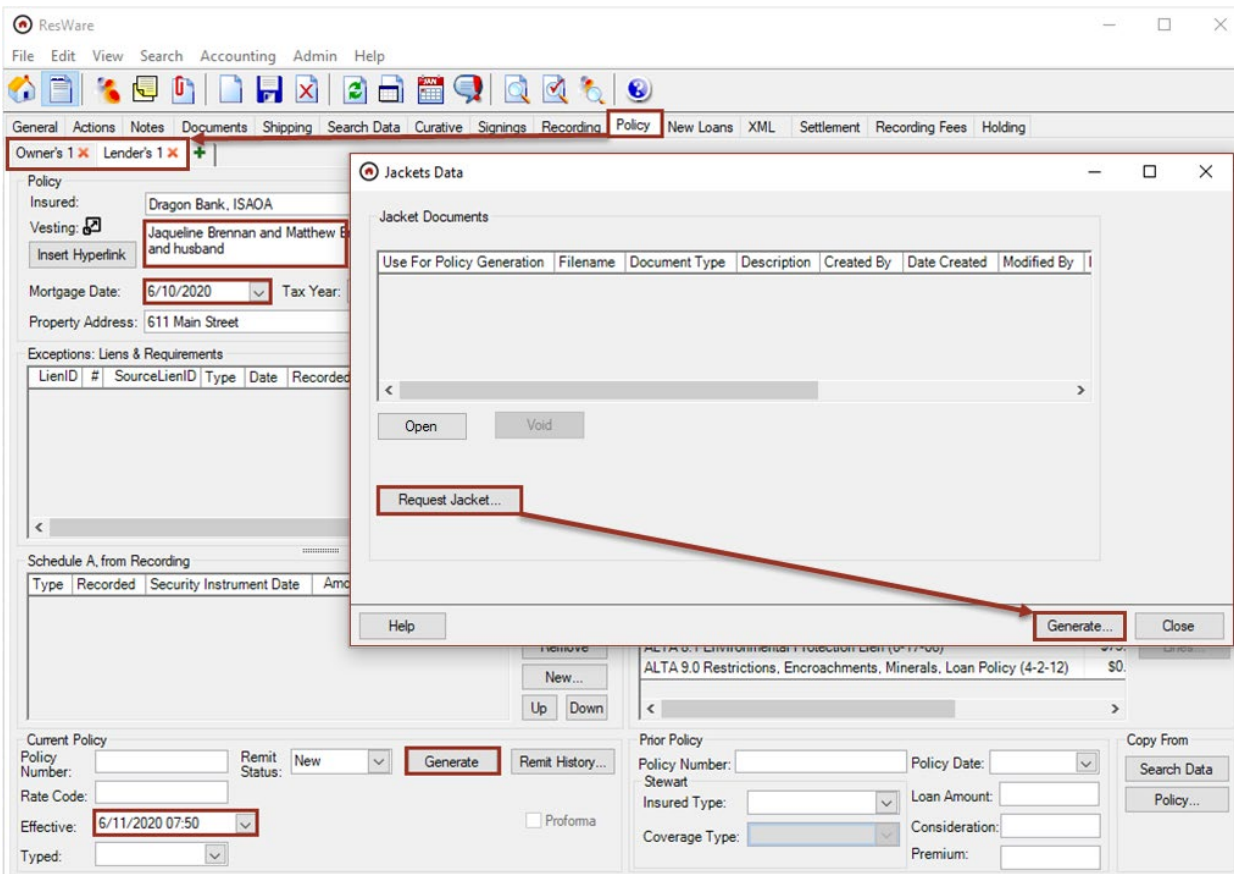




Requesting a policy jacket

File/Policy

- Select an *Owner's* or a *Lender's* tab and complete the information on the policy panel as needed, including the **Effective** date in the *Current Policy* area. If requesting a short form policy, complete the **Vesting** and **Mortgage Date**.
- Click **Generate** to open the *Jackets Data* panel.
- Click **Request Jacket**.



- Enter the **Username** and **Password** provided by Stewart Title and click on the **Login** button.
Note: The username and password will be retained for each user after it is entered the first time.
- Select the **Stewart Agency**. This will populate the **Agency Location** options available.
- Select the **Agency Location**.
- Select a **Jacket Date**. The policy's effective date will be populated by default; otherwise, enter the jacket date.
- Select the **Jacket Form**.

- The **Property Type** defaults to *Residential – General*. If needed, this can be changed to *Commercial – General*.
- Select the **Transaction Type**.
- The **Liability** amount auto-populates from the policy’s consideration amount.
- If this is a simultaneous issue, check **Simultaneous Issue**.
- Select the **Successor Language**.
- *Fields and Endorsements*:
 - This section displays data regarding the file that is necessary to request a jacket. Some of these fields contain information auto-populated from the file; users need to manually complete anything not auto-populated. All fields in this area are required.
- Click **Generate**.

Stewart Jacket Questions

Username:
 Stewart Agency:

Password:
 Agency Location:

Jacket Date:
 Jacket Form:

Property Type:
 Transaction Type:

Liability:
 Simultaneous Issue

Successor Language:

Fields and Endorsements

Jacket Premium: Jacket Premium

Actual Premium Amount	<input type="text" value="\$500.00"/>
Actual Underwriter Remittance Amount	<input type="text" value="\$90.00"/>
Addendum Attached	<input type="checkbox"/>
Mortgage Amount	<input type="text" value="\$450,000.00"/>
Mortgage Date	<input type="text" value="7/10/2020"/>
State Statutes	<input type="text"/>
Policy Time Stamp	<input type="text" value="16:22"/>
Borrower Names and Vesting	<input type="text" value="Harry Henderson an"/>

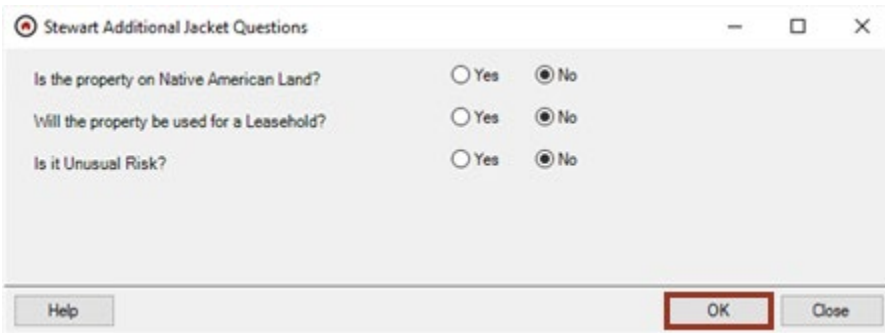
ALTA 22-06 Location Rev 6-17-2006 Premium

Actual Premium Amount	<input type="text" value="\$25.00"/>
Actual Underwriter Remittance Amount	<input type="text" value="\$4.50"/>

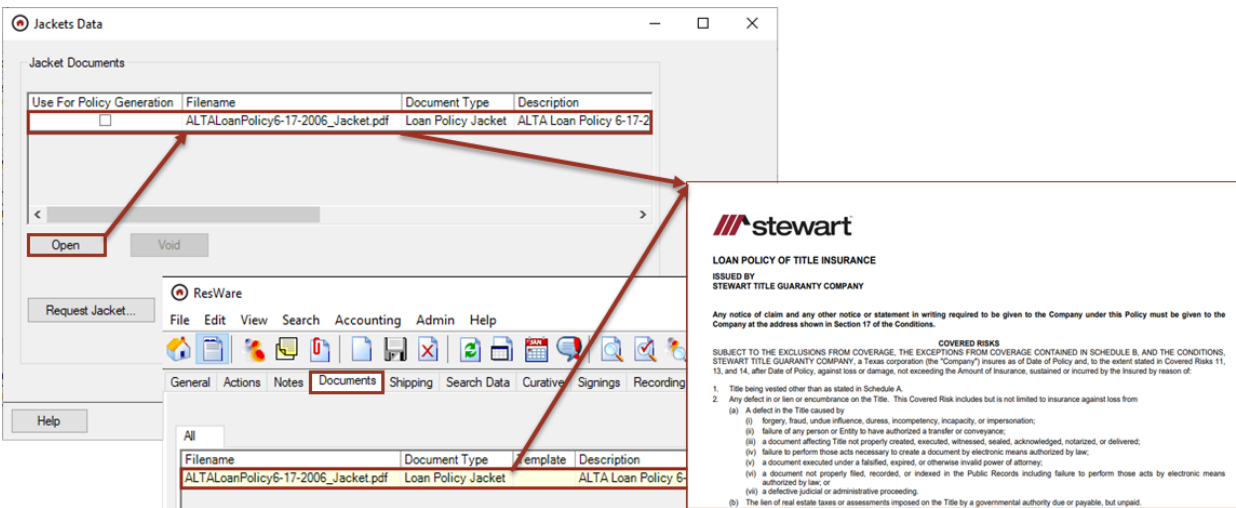
ALTA 5-06 Planned Unit Development Rev 2-3-10 Premium

Actual Premium Amount	<input type="text"/>
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Additional Stewart jacket questions, if any, will be displayed with default answers selected. Answer any questions and click **OK**.



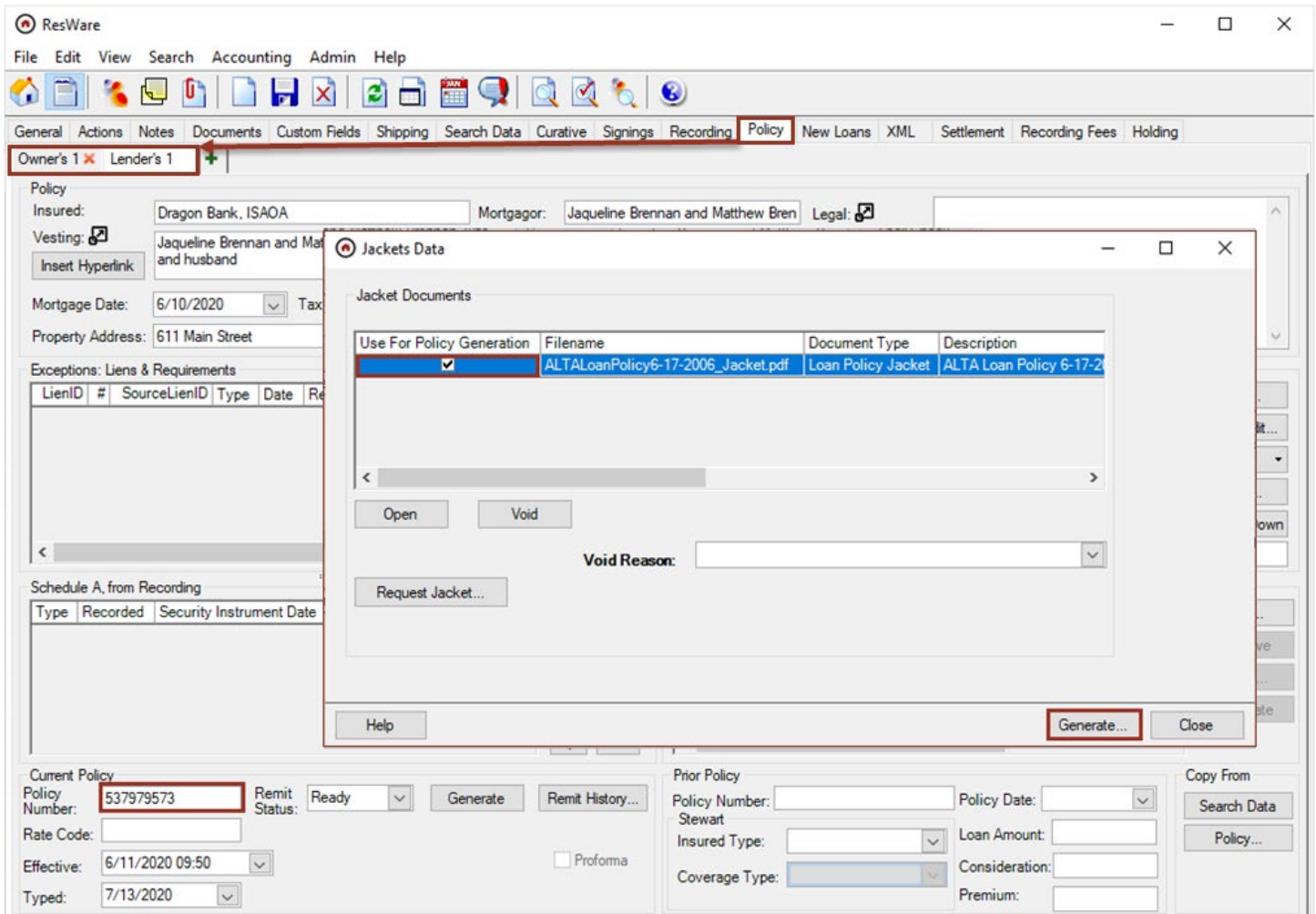
The jacket is created. Click **OK** on the success message. The created jacket is displayed in the *Jackets Data* panel and on the *File/Documents* panel.



Generating a policy with the jacket

File/Policy/Jackets Data

- In the *Jackets Data* panel, check *Use For Policy Generation* and click on **Generate**. The policy will be generated using the selected jacket, and the **Policy Number** will be populated in the *Policy* panel.

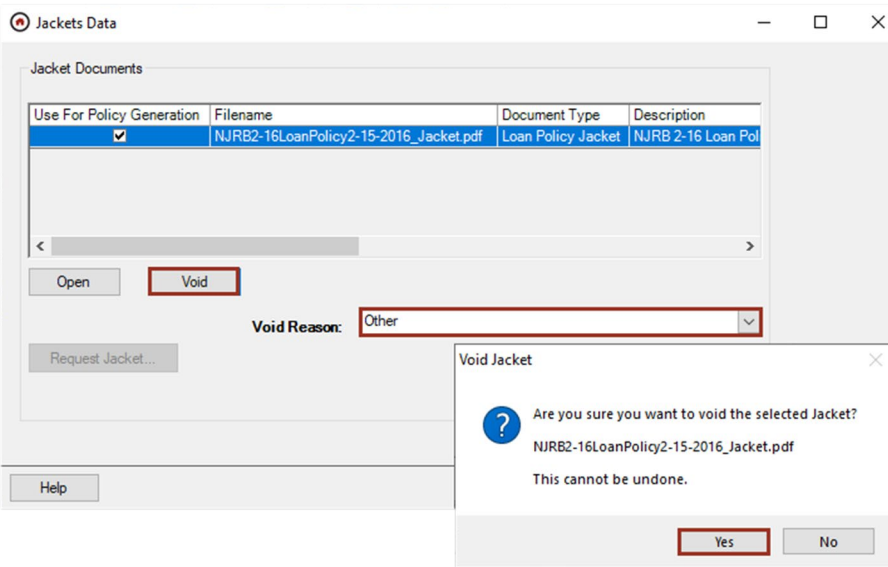


Voiding a policy jacket

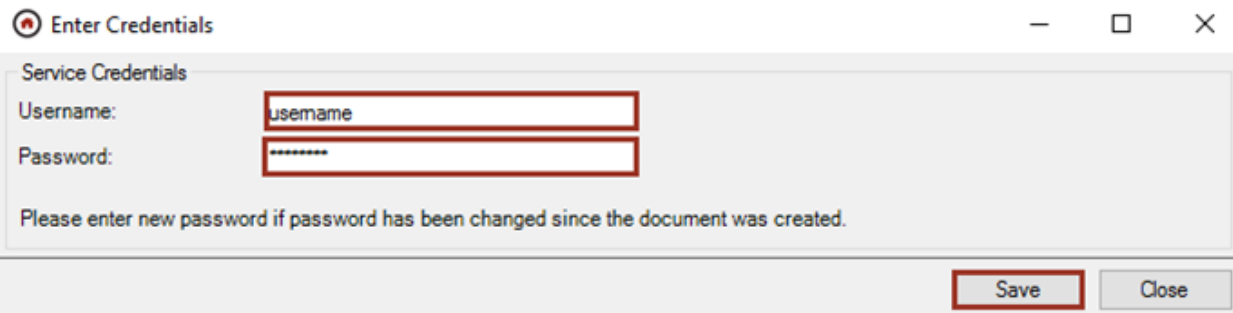
File/Policy

To void a jacket for a policy that has not yet been issued:

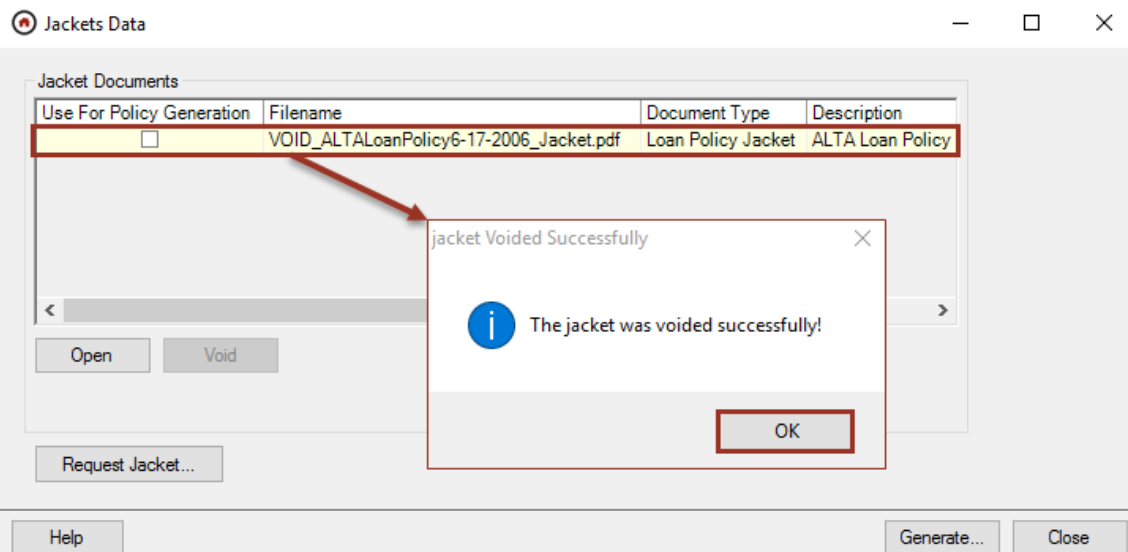
- Click **Generate** from the policy to be voided.
- Select the policy jacket to void.
- Select the **Void Reason**.
- Click **Void**.
- Confirm the jacket should be voided by clicking **Yes**.



- Enter or verify that the populated **Username** and **Password** are correct and click **Save**.

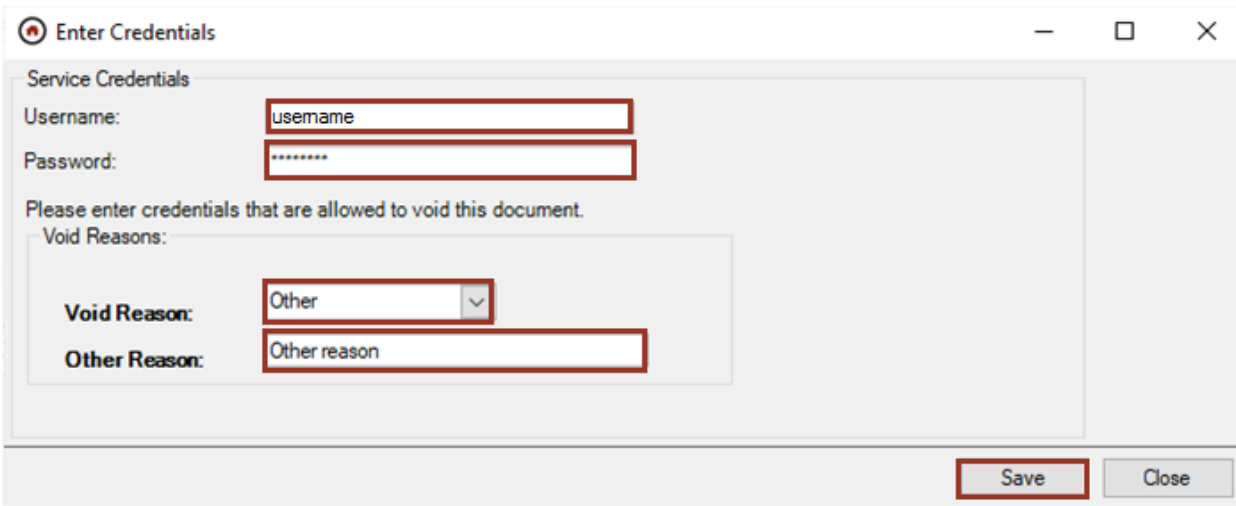


The policy jacket is voided. Click OK on the success message. The voided jacket filename will be updated to contain *VOID*.



To void a jacket for a policy that has been issued:

- Change the **Remit Status** on the policy to *Void*.
- Click **OK** on the prompt about voiding jackets and endorsements, then click **Yes** to void the jacket.
- Enter or verify that the populated **Username** and **Password** are correct.
- Select a **Void Reason**
- Click **Save**.



The policy jacket is voided. Click **OK** on the success message. The voided jacket filename will be updated to contain *VOID* and the policy will be voided.

Filename	Document Type	Template	Description
ALTA 9.0 Restrictions, Encroachments, Minerals Loan Policy - 04-02-12.doc	Policy Package	ALTA 9.0 Restrictions, Encroachments, Minerals, Loan Policy (4-2-12)	
ALTA 8.1 Environmental Protection Lien 6-17-06.doc	Policy Package	ALTA 8.1 Environmental Protection Lien (6-17-06)	
ALTA 5 Planned Unit Development 2-3-10.doc	Policy Package	ALTA 5 PUD (2-3-10)	
ALTA 22 Location 6-17-06.doc	Policy Package	ALTA 22 Location (6-17-06)	
ALTA Loan Policy 6-17-06.doc	Policy Package	ALTA Loan Policy (6-17-06)	Lender's 1
VOID:ALTALoanPolicy6-17-2006_Jacket.pdf	Loan Policy Jacket		ALTA Loan Policy 6-17-

