

## **Stewart Access**

Release Notes
August 23, 2019
Version 2.2.9 (Portal & Express)



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### **Stewart Access 2.2.9 Release Notes**

Stewart Access 2.2.9 includes enhancements for Stewart Access Portal and Express.

Deployment Date: August 23, 2019

## **New in This Release (Portal)**

An overview of new features and modifications to Stewart Access Portal 2.2.9 include:

#### Premium Tax Calculations in Jackets for Kentucky (KY):

- While creating Jackets, users will now see Actual Premium Tax and Calculated Premium Tax fields in Jacket
  Pricing and Endorsement Pricing. This is only applicable in States where tax calculations are required (i.e. KY).
- While creating Jackets, users will now see Actual Fee Tax and Calculated Fee Tax fields in CPL Pricing. This
  is only applicable in States where tax calculations are required (i.e. KY).

Note: These Premium Tax Calculations are based on the Property's Municipal Code.

#### Revision with Premium Tax for Kentucky (KY):

- When revising an Issued Jacket with Premium Tax, users can now revise the Actual Premium Tax.
- When revising an Endorsement on an Issued Jacket with Premium Tax, users can now revise the Actual Premium Tax.
- When revising CPL Pricing Line Item on an Issued Jacket with Premium Tax, users can now revise the Actual Fee Tax.

#### Premium Tax Calculations in Post Policy Endorsements for Kentucky (KY):

 Post Policy Endorsements will now show Actual Premium Tax and Calculated Premium Tax fields for Jackets, based on the State that require tax calculations (i.e. KY).

#### A new error message pop-up will appear when:

- The Actual Premium Tax field is empty while Issuing or Revising a Jacket or Post Policy Endorsement.
- The Actual Fee Tax field is empty while Revising a CPL Pricing Line Item.

## **New in This Release (Express)**

An overview of new features and modifications to Stewart Access Express 2.2.9 include:

- Ability to provide Municipal Code on the Property for the States that require Municipal Code on CPLs and Jackets.
- Premium Tax Calculations in Jackets for Kentucky (KY):
  - While creating Jackets, users will now see Actual Premium Tax and Calculated Premium Tax fields in Jacket Pricing and Endorsement Pricing. This is only applicable in States where tax calculations are required (i.e. KY).
  - While creating Jackets, users will now see Actual Fee Tax and Calculated Fee Tax fields in CPL Pricing.
     This is only applicable in States where tax calculations are required (i.e. KY).
    - Note: Premium tax calculations are based on the property Municipal Code
- CPL Pricing Revision with Premium Tax for Kentucky (KY):
  - When revising CPL Pricing Line Item on an Issued Jacket with Premium Tax, users can now revise the Actual Fee Tax.
- A new error message pop-up will appear when:
  - The Actual Premium Tax field is empty while Issuing or Revising a Jacket or Post Policy Endorsement.
  - The Actual Fee Tax field is empty while Revising a CPL Pricing Line Item.

### **Portal Enhancements**

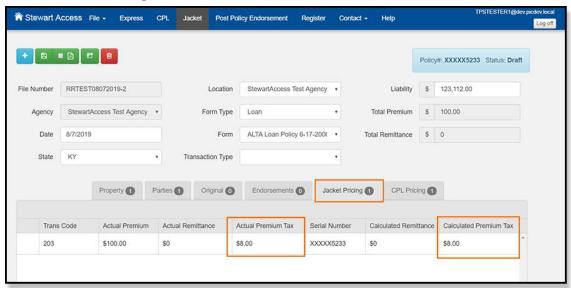
# Premium Tax Calculations in Jackets for Kentucky (KY):

In this release, users can now add **Premium Tax Calculations** on Jacket Pricing, Endorsement Pricing, and CPL Pricing on Jackets, if it is required by State (i.e. Kentucky).

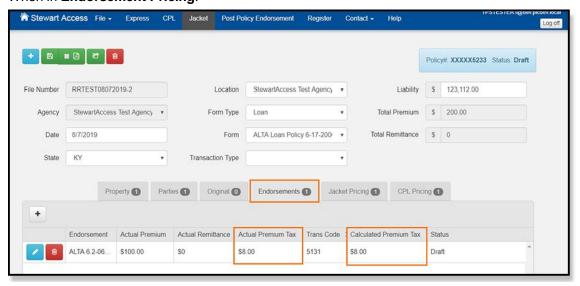
#### **Jacket Pricing and Endorsement Pricing**

In Jacket Pricing or Endorsement Pricing while creating a Jacket, new fields called *Actual Premium Tax* and *Calculated Premium Tax* fields have been added in the Line Item.

When in Jacket Pricing:



#### When in Endorsement Pricing:

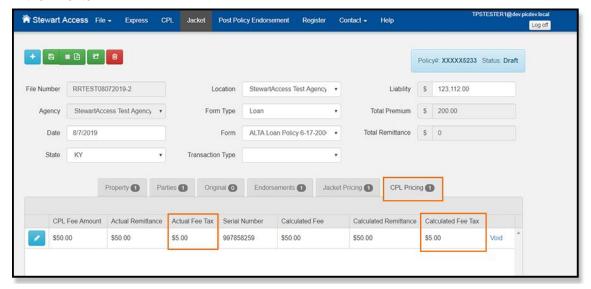


When entering in the Actual Premium, the Actual Premium Tax and Calculated Premium Tax are pre-calculated based on the Actual Premium and tax percentage in correspondence to its **Municipal Code** on the Jacket Primary Property.

Users can edit and change the Actual Premium Tax manually as well.

#### **CPL Pricing**

In CPL Pricing while creating a Jacket, new fields called *Actual Fee Tax* and *Calculated Fee Tax* fields have been added in the Line Item.

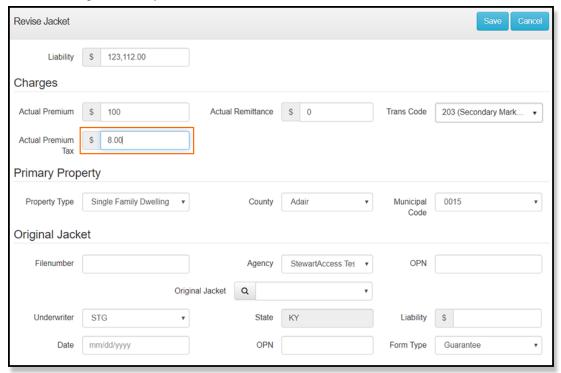


When entering in the Actual Premium, the Actual Fee Tax and Calculated Fee Tax are pre-calculated based on the Actual Fee Tax and tax percentage in correspondence to its **Municipal Code** on the Jacket Primary Property.

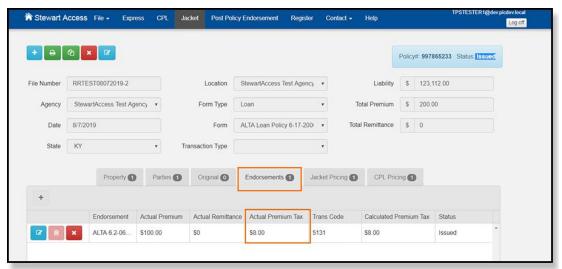
You can edit and change the Actual Fee Tax manually as well.

# **Revision with Premium Tax in Jackets for Kentucky (KY):**

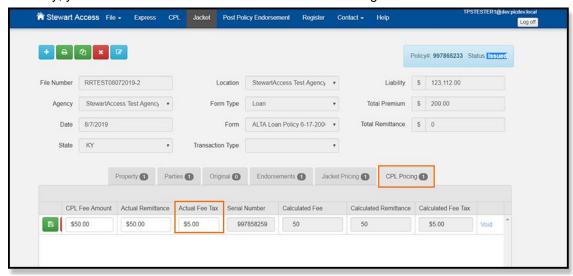
When revising a Jacket, you can now revise the Actual Premium Tax as well.



You can also revise the Actual Premium Tax on Endorsements on an Issued Jacket

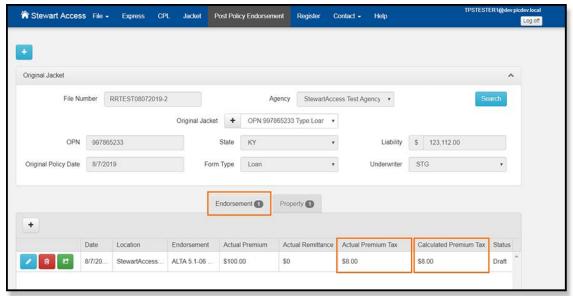


Similarly, you can also revise Actual Fee Tax on a CPL Pricing Line Item on Issued Jacket.



# Premium Tax Calculations in Post Policy Endorsement for Kentucky (KY):

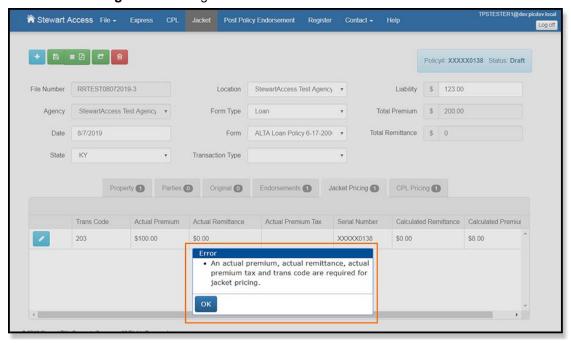
In this release, users can now see **Premium Tax Calculations** on **Endorsement Pricing** in Post Policy Endorsement, if it is required by State (i.e. Kentucky).



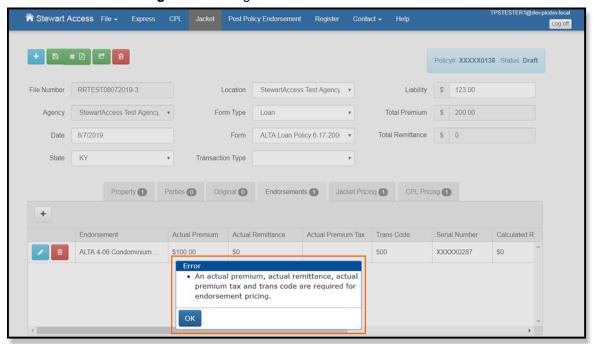
# **Error Message for Premium Tax Calculations:**

While **Issuing** or **Revising** a Jacket or Post Policy Endorsement, if the *Actual Premium Tax* field is left empty then you will be notified with an error message.

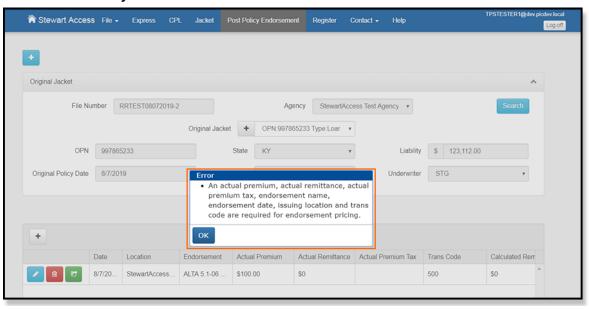
For Jacket Pricing while creating a Jacket:



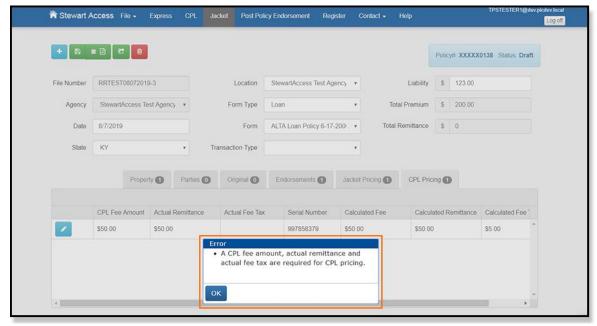
#### For Endorsement Pricing while creating a Jacket:



#### When in Post-Policy Endorsement:



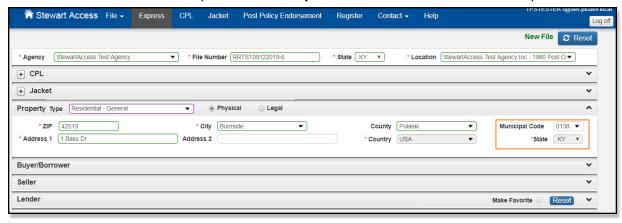
Similarly, while **Revising** a CPL Pricing Line Item in a Jacket, if the *Actual Fee Tax* field is left empty then you will be notified with the following message:



# **Express Enhancements**

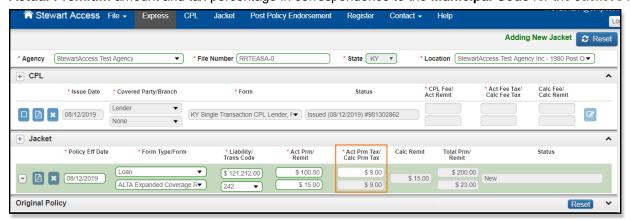
# Ability to provide a Municipal Code on Property in States that require on CPLs and Jackets:

**Municipal Code** will automatically populate on the Jacket based on the Property's **City and State** or **County and State**. User can also choose the Municipal Code manually from list of available codes in the drop-down menu.



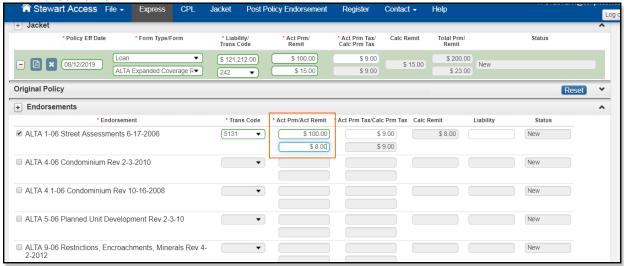
## **Jacket Pricing and Endorsement Pricing:**

While in **Jacket Pricing** or **Endorsement Pricing**, new tax fields called *Act Prem Tax* and *Calc Prem Tax* have been added. When users enter in the Actual Premium, the *Act Prem Tax* and *Calc Prem Tax* are pre-calculated based on the **Actual Premium** amount and tax percentage in correspondence to the **Municipal Code** for the Jacket's Property.



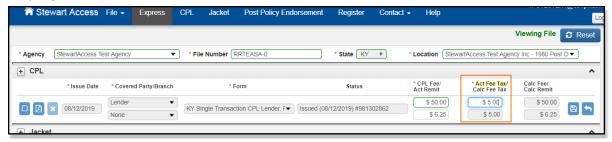
You can edit and change the Actual Premium Tax manually as well.

#### In Endorsements:



## **CPL Pricing with Premium Tax for Kentucky (KY):**

When creating a **Jacket**, new tax fields called *Act Fee Tax* and *Calc Fee Tax* have been added. These fields are precalculated based on the *CPL Fee Amount* and corresponding tax percentage for the **Municipal Code** for the Jacket's Property.



Users can manually edit the Actual Fee Tax as well.

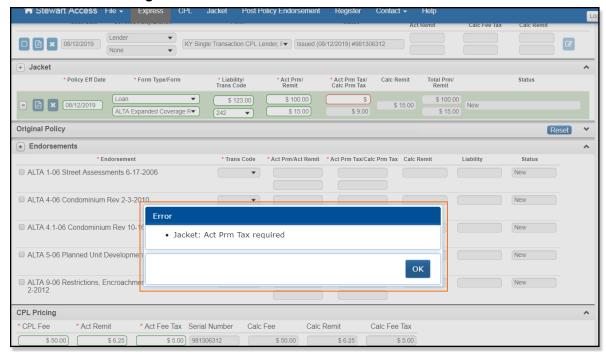
#### **CPL Pricing Revision on Premium Tax for Kentucky (KY):**

When revising a CPL Pricing Line Item, you can now revise the Act Fee Tax as well.

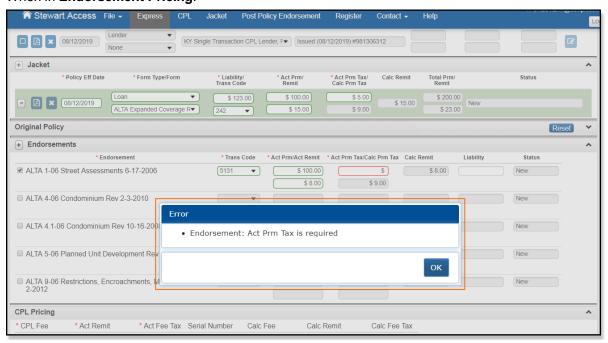
## **Error Message for Premium Tax Calculations:**

When issuing a Jacket, if the *Act Prem Tax* field is left empty on **Jacket Pricing** or **Endorsement Pricing**, then an error message pop-up will appear.

#### When in Jacket Pricing:



#### When in Endorsement Pricing:



↑ Stewart Access File - Express CPL Jacket Post Policy Endorsement Register Contact - Help Viewing File & Reset \* Location StewartAccess Test Agency Inc - 1980 Post O ▼ \* Agency StewartAccess Test Agency ▼ \* File Number (RRTEASA-6 \* State KY \* \* Act Fee Tax/ Calc Fee Tax (KY Single Transaction CPL Lender, F▼) Issued (08/12/2019) #981306312 \$ 50.00 \$ 6.25

• CPL Charges: Act Fee Tax is required

City Ludlow

Attn. To

\* Act Prm Tax/ Calc Remit Calc Prm Tax

\$ 6.25

•

(859) 344-7690

**Zip** 41016-1543 ▼

Issued (08/12/2019) M-0000-981307970

Municipal Code 0138 ▼

Make Favorite Reset

Fax

\*State KY ▼

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Similarly, when in **CPL Pricing** revision, if the *Act Fee Tax* field is left empty, then following message will appear:

13

□ × 08/12/2019

\* Policy Eff Date

Loan

Huntington National Bank, The

(Loan ALTA Exp.

Property Type Residential - General \* **ZIP** 42519

Mailing Address 300 Elm St

\* Address 1 1 Bass Dr

Buyer/Borrower Seller

Lender

+ Jacket

# **Additional Information**

# **Training**

More information about Stewart Access functionality is available in the Stewart Access Online Help. For additional training and documentation including Quick Reference Cards, please see the <u>Stewart Access Training Center</u>.

# **Technical Support**

For technical support, contact the Stewart Customer Care Center at 1.877.800.3132 or <a href="mailto:customerCare@stewart.com">CustomerCare@stewart.com</a>.