

Stewart Access

Upgrade Guide

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Stewart Access Upgrade Guide

This guide was developed for ASMs, ASRs and their agents as they to prepare for Stewart Access.

Upgrade Process Overview

Review this guide with your Agent and discuss what is changing with Stewart Access and how they may need to make changes in their current CPL and Policy operations. Additionally, determine if any additional steps are required for your Agent's TPS, as shown in the last part of this guide.

Once ready, you or your agent will submit a formal [request](#) to begin the upgrade to Stewart Access.

Your agent can add, change, or deactivate CPL and/or Jacket users as part of this request. If agents need to see a current list of users, they can request one from stewartaccessdeploymentteam@stewart.com.

After the Stewart Deployment team processes the request your agent will receive an email from Stewart (with a CC to you) containing the upgrade go live date, typically 7-10 business days after the request is submitted.

On the upgrade go live date your agent can begin using Stewart Access.

Your agents still have access to their existing legacy inventory (i.e. STEPS) for one month following your upgrade date.

Additional transition time can be granted if needed, though it is expected that ASMs/ASRs will have planned for the standard 1-month transition time before beginning the upgrade.

What's Changing with Stewart Access

In addition to visiting the [Stewart Access Training Center](#), the topics below highlight some of the key changes with *Stewart Access* and should be reviewed by ASMs/ASRs and their Agents before beginning the upgrade process.

Automatic Transmittal of Jackets

For all *Stewart Access* users, except those using *AIM+*, Policy Jacket data is automatically transmitted to Stewart and there is no separate "transmittal" action needed from the agent.

Jacket and **CPL** data is transmitted to Stewart and recorded in an agent's account three days following the policy date entered by the agent. It is important to note that this information will be the primary source of record for the policy; images submitted later are used only for archival purposes. For this reason it is important to ensure the data entered when issuing a policy is as accurate as possible. See below for a summary of the **CPL** and **Jacket** submitting timeline.

Agent opens new file
Agent creates and issues new CPL
Agent drafts new Jacket
Agent issues jacket and receives policy serial number <i>CPL no longer editable</i>
Jacket and CPL automatically transmitted 3 days after <u>date of policy</u>
Agent Remits payment Full charges shown on portal register* *CPLs appear on portal register only if associated to a charge
Agent submits schedules and policy images

**Stewart Access integration will not impact the way AIM+ users transmit policies to Stewart.*

Remitting Payment

When remitting payments it is essential that Agents indicate the amount to be applied to *each file*.

There are two ways this can be done:

- Submit separate checks for each file, with a file number written on the check.
- Submit one check for multiple files, along with an accompanying **Register Report** showing the amount to apply to each file. If remitting via wire payment, a register report must also be submitted by email. The register report should cover the full amount of the check or wire payment.

A register report is available from the *Stewart Access* web portal, or agents can use a report generated from their own TPS so long as it clearly indicates payment amounts for each file.

See the **Policy Remittance Information** under *Self-Paced Learning* on the [Stewart Access Training Center](#) for more information.

Submitting Images and Schedules

The two preferred methods for submitting policy images and schedules are not changing:

- **Mail** (including digital media such as CDs)
 - Use preprinted envelopes available from your ASM
 - Additional envelopes can also be ordered from [Customer Care](#)
- **FTP**
 - If not already setup to submit to Stewart's FTP site please contact [CustomerCare](#)
 - Preferred file format is PDF
 - Each policy should be saved as a separate image, named with the policy number
 - Policies should be submitted in the existing agency folder; do not create new folders on the FTPsite
 - Images should be in portrait not landscape
 - Policies need to be in the correct order, i.e. Schedule A followed by Schedule B, etc. thenendorsements

Endorsements

Endorsement information is not currently required when pulling a policy jacket from a *Stewart Access* integrated TPS, except on **Short Form Loan Policies** and **Texas Policies**.

Agents are still responsible for including all endorsement details and copies when reporting the full policy to Stewart.

Policy Serial Numbers

Policy serial numbers will no longer contain prefixes that identify form type.

Transaction Codes

Transaction codes must now be included on all policies and endorsements.

Commitments

Commitment functionality is not yet available with Stewart Access TPS integrations. See **Commitments when using an Integration** in the *Tips and Tricks* section of the [Stewart Access Training Center](#).

Frequently Asked Questions

What if an Agent finds that Stewart Access won't work for them after the upgrade?

It is possible to extend the *Stewart Access* transition period if *Stewart Access* has limitations that will prevent an agent from completing policies or CPLs. Agents should work with their **ASM/ASR** to discuss the specific issue, and the **ASM/ASR** will be able to determine how best to resolve the issue and if it is necessary to request an extension or rollback from Stewart.

Can an ASM do an upgrade for an Agent?

Yes, however the **ASM** should still thoroughly review what will be changing with their agent and provide Stewart with a clear point of contact to receive important announcements throughout the transition and decommissioning process.

I've never had to use Transaction codes before, why are they required now?

Transaction codes have always been required by Stewart, and by regulatory bodies in some states. In the past, because of the way policies were processed, there was an opportunity for **Stewart Policy Services** to manually add in missing transaction codes. As Stewart works to upgrade, and speed up its policy processing operations, these manual additions will no longer be feasible. Additionally, having transaction codes entered directly by the issuing agent will greatly improve data quality. Expect future versions of Stewart Access to make entering transaction codes even easier.

Why is so much detail needed with payments now?

As part of the transition to *Stewart Access*, Stewart is also updating the way agent accounts are maintained. Payment detail is now tracked at the file level, allowing for much more accurate account reconciliations. To correctly match up payments and files Stewart needs to know how remittances should be applied to outstanding file changes.

Details for TPS/Web Portal

Web Portal

Upgrade Process Changes

- None

Additional Training

- *Stewart Access Express* (CPL and Jackets) [view the video](#) (duration 21:52)
- **Closing Protection Letter** (CPL) [view the video](#) (duration 17:44) and refer to the [User Guide](#) and [Quick Reference Guide](#).
- Jackets [view the video](#) (duration 26:10) and refer to the [User Guide](#) and [Quick Reference Guide](#)

AccuTitle

Upgrade Process Changes

- AccuTitle System Administrator privileges are required to initially input your *Stewart Access* login credentials into TitleDesktop/Magram Online

Additional Training

- Closing Protection Letter (CPL) refer to the [Quick Reference Guide](#) provided by AccuTitle
- Jackets refer to the [Quick Reference Guide](#) provided by AccuTitle
- CPL and Jackets [view the video](#) (duration 25:34) provided by AccuTitle/Stewart

AIM+

Upgrade Process Changes

- Note that Stewart Access User ID/Password will be the same as your TWP/AIM+ User ID/Password
- AIM+ inventory will be decommissioned after 8:00 p.m. Central the night before your go live date
- AIM+ inventory will be removed from your AIM+ database 1 week after go live date

Additional Training

- Closing Protection Letter (CPL) [view this video](#) (duration 6:55) and reference the [Quick Reference Guide](#).
- Jackets [view the video](#) (duration 26:10) and refer to the [Quick Reference Guide](#) and [Retrieve Policy Data](#)

Closers' Choice

Upgrade Process Changes (Closers' Choice Client Edition)

- Contact your Closers' Choice Support Center to request and/or schedule update
- Provide your Stewart Access/Closers' Choice Tech with go live date

Upgrade Process Changes (Closers' Choice Web Edition)

- No update required

Additional Training

- Closers' Choice-Stewart Access 2.5 Integration refer to the [training video](#)
- Closers' Choice CPLs refer to the [User Guide](#) and [Quick Reference Guide](#) provided by Closers' Choice/Stewart Title
- Closers' Choice Jackets refer to the [User Guide](#) and [Quick Reference Guide](#) provide by Closers' Choice/Stewart Title

Displaysoft

Upgrade Process Changes

- None

Additional Training

- Closing Protection Letter (CPL) and Jackets refer to the [DisplaySoft User Guide](#) provided by DisplaySoft.

E-Closing

Upgrade Process Changes

- Users with Stewart Access login credentials must reconfirm, validate, and update connections prior to go live with Jackets.

Additional Training

- Closing Protection Letter (CPL) and Jackets refer to the [E-Closing User Guide](#) provided by E-Closing.

LandTech

Upgrade Process Changes

- LandTech Server Edition
 - Contact your LandTech Support Center to schedule upgrade
 - Provide your Stewart Access/LandTech go live date
- LandTech Cloud Edition
 - No LandTech upgrade required

Additional Training

- **Closing Protection Letter** (CPL) refer to the [User guide](#) provided by LandTech
- **Jackets** refer to the [User Guide](#) provided by LandTech
- **Closing Protection Letter** (CPL) and **Jackets** [view the video](#) (duration 37:44) provided by LandTech

Qualia

Upgrade Process Changes

- Qualia System Administrator privileges are required to initially input your *Stewart Access* login credentials into the Underwriter Menu under Integrated Underwriters

Additional Training

- **Jackets** and **Closing Protection Letter** (CPL) refer to the [Qualia User Guide](#) provided by Qualia

RamQuest

Upgrade Process Changes

- RamQuest Closing Market TPR (Trading Partner Relationship Agreement) is required to initiate the Stewart integration
 - Contact your RamQuest Support Center for assistance to submit

Additional Training

- **RamQuest Stewart Title Integration** refer to the [training video](#).
- **RamQuest Stewart Title Integration** refer to the [User Guide](#).
- **Closing Protection Letter (CPL)** refer to the [Quick Reference](#) document.

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- **Jackets** refer to the [Quick Reference](#) document.

ResWare

Upgrade Process Changes

- Contact your ResWare Support Center to verify your integration version (*9.10 or higher*) and/or schedule upgrade
- Email [Stewart Access Deployment Team](#) with your ResWare upgrade date

Additional Training

- **ResWare-Stewart Access 2.5 Integration** refer to the [training video](#).
- **Underwriter CPLs & Policy Jackets** refer to the [User Guide](#) provided by ResWare.
- **ResWare Admin Job Aid** refer to the [Quick Reference](#) document provided by ResWare.

SnapClose

Upgrade Process Changes (SnapClose Server Edition)

- Contact your SnapClose Support Center to request and/or schedule upgrade if assistance is needed.
- Provide your Stewart Access/SnapClose Tech with go-live date.

Upgrade Process Changes (SnapClose Cloud Edition)

- No upgrade required.
- Activate Stewart in **User Preferences** with valid Stewart Credentials.

Additional Training

- **SnapClose Stewart Title Integration** refer to the [User Guide](#).
- **SnapClose Stewart Title Integration** refer to the [Training Video](#).
- **Closing Protection Letter (CPL)** refer to the [Quick Reference](#) document.
- **Jackets** refer to the [Quick Reference](#) document.

Softpro

Upgrade Process Changes

- Access from the 360 Services Menu (Note: If unavailable contact your SoftPro Support Center).

Additional Training

- **SoftPro Stewart Title Integration** refer to the [training video](#).
- **SoftPro Stewart Title Integration** refer to the [User Guide](#).
- **Closing Protection Letter (CPL)** refer to the [Quick Reference](#) document.
- **Jackets** refer to the [Quick Reference](#) document.

TitleExpress

Upgrade Process Changes

- **TitleExpress** requires an update to **Version 9.6** to utilize new integration.
 - **Hosted/Cloud** agents automatically updated to **9.6** between **8/20/2021** and **8/22/21**.
 - **Non-Hosted/Cloud** agents, schedule your **9.6** update through the TitleExpress [Online Scheduler](#).

Additional Training

- **TitleExpress Stewart Title Integration** refer to the [training video](#).
- **TitleExpress Stewart Title Integration** refer to the [User Guide](#).

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- **Closing Protection Letter (CPL)** refer to the [Quick Reference](#) document.
 - **Jackets** refer to the [Quick Reference](#) document.

TrackerPro

Upgrade Process Changes

- None

Additional Training

- **TrackerPro Stewart Title Integration** refer to the [training video](#).
- **TrackerPro Stewart Title Integration** refer to the [User Guide](#).
- Contact [TrackerPro Support Center](#)

Turbo Title

Upgrade Process Changes

- Turbo Title Server Edition
 - Contact your Turbo Title Support Center to verify your integration version and/or schedule upgrade.
 - Provide your Stewart Access/Turbo Title go live date.

Additional Training

- Contact your Turbo Title Support Center for assistance.
- **Closing Protection Letter (CPL)** [view this video](#) (duration 3:49) provided by Turbo Title.
- **Jackets** [view this video](#) (duration 4:44) provided by Turbo Title.

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 contact visit the [Stewart Access Training Center](#).

Technical Support

For technical support, contact the Agency Support Center at 1.844.835.1200 or CustomerCare@stewart.com.