TrackerPro

Stewart Title Integration

User Guide

Revised: 3/11/2021

Changes

As of TrackerPro V14.80.7 there are significant improvements in the Stewart Title Integration. The following is a list of the most Notable Items

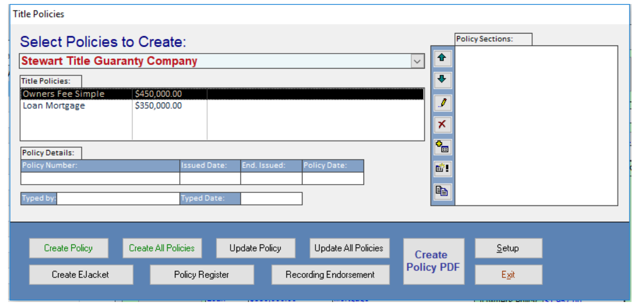
- **The Integration will no longer bring you to Stewart Title's Website**. In certain situations previously when you clicked Download Now from within TrackerPro, you would be redirected out of TrackerPro and brought to Stewart's website to complete your EJacket/CPL. Now 100% of the process will be completed from within TrackerPro.

- **You can include a Counter-Signature**. The EJacket will allow you to upload and select an image of a signature, and that image will automatically be included on the EJacket, preventing the need to manually sign your policy jacket. Instructions for adding a signature are included at the end of this User Guide, or you can contact support@trackerprollc.com of 631-393-6999 for assistance with this.

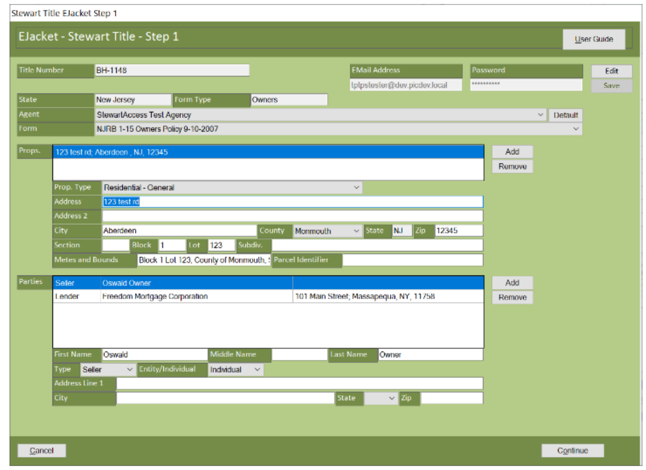
- **Additional Charges on an EJacket can be specified during the ordering process.**

- **Additional Participants on a CPL can be specified during the ordering process.**

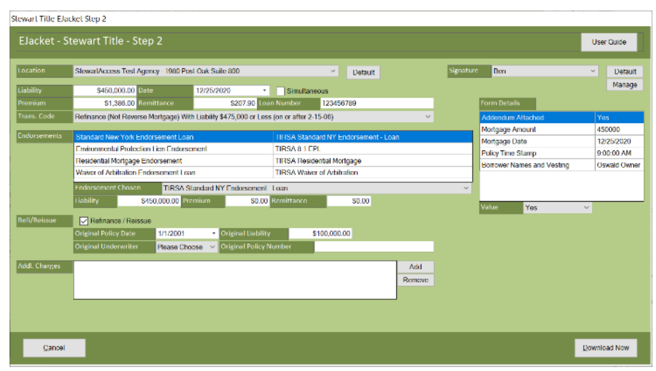
Issue EJacket



1) Click the Create EJacket button from within the Title Policy Documents window of TrackerPro. The Stewart Title Underwriter EJacket Form will open.

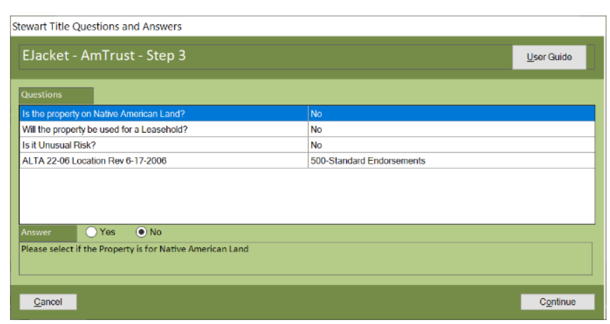


2) The first window that opens is Step 1. This will allow the user to view and confirm the basic information that will be involved in the EJacket, including Agent, Form, Properties, and Parties. TrackerPro will auto-populate all fields necessary to create the EJacket. The user may override many of the settings. Note: The user can type anything into these fields however our suggestion is to always enter the correct information into the proper area of TrackerPro before opening the EJacket window so that all correct values will be displayed. **If the user adjusts something in the EJacket window, it will not change the values in any other areas of TrackerPro. It will only be used for the current EJacket order.**



3) The second window that opens is Step 2. This will allow the user to view and confirm detailed information including the Liability, Premium, Endorsements, Signature, and many other fields. Some of the fields shown in the screenshot may not be available depending on the transaction. TrackerPro will auto-populate MOST fields. Notably the following fields do not get automatically populated: Original Underwriter, Original Policy Number, Additional Charges.

   When you click the Download Now button. If this policy meets all of Stewart's requirements for issuing a policy the EJacket will be generated, downloaded, and saved in the TrackerPro File Cabinet for the current application. The EJacket will also be added to the Title Policy Sections window so that they can be included when full Title Policy is created and, the Policy Number will automatically merge into all policy and endorsement documents.

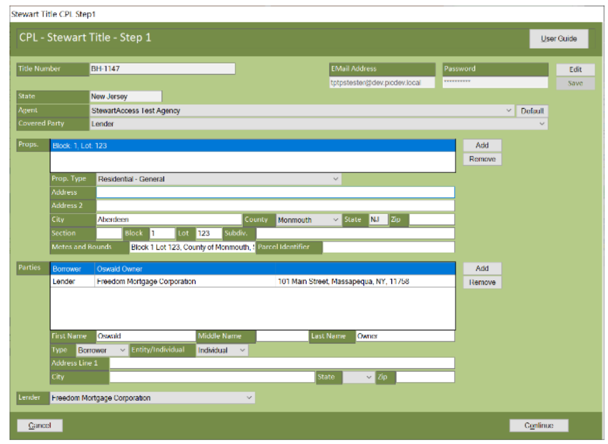


4) Situationally you may be presented with a Step 3. This would be a question and answer stage that may request various information pertaining to this particular file. These questions will be defaulted by Stewart.

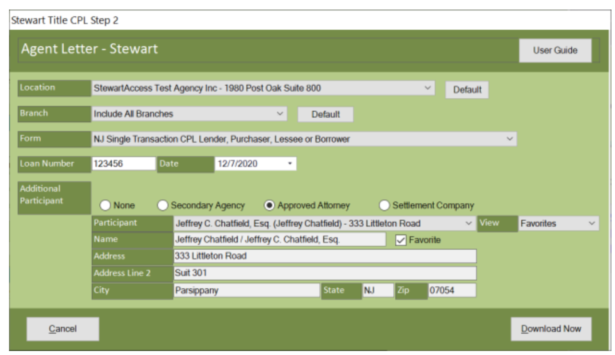
CPLs

1) Open the Edit Transactions window, select the Loan Policy for which the CPL will be issued and click the CPL button. This button may be labelled Closing Protection Letter or something similar depending on the state. As a reminder, CPLs are generated on Loan Policies only. The Underwriter Letter Form for Stewart Title will open. Note that Stewart does not support letters in NY state.

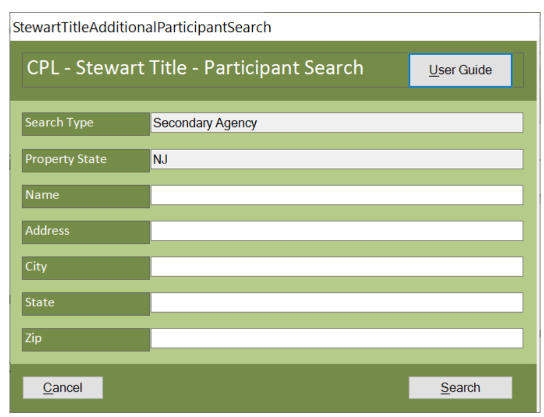
2) The first window that opens is Step 1. This will allow the user to view and confirm the basic information that will be involved in the CPL, including Agent, Covered Party, Properties, and Parties. TrackerPro will auto-populate all fields necessary to create the CPL and will default Covered Party to Lender. The user may override many of the settings. Note: The user can type anything into these fields however our suggestion is to always enter the correct information into the proper area of TrackerPro before opening the EJacket window so that all correct values will be displayed. **If the user adjusts something in the EJacket window, it will not change the values in any other areas of TrackerPro. It will only be used for the current EJacket order**



3) The second window that will open is Step 2. This will allow the user to view and confirm detailed information including the Form, and any Additional Participants on the CPL. TrackerPro will auto-populate MOST fields. Notably the only Additional Participant that would be automatically chosen would be Approved Attorney, based on the Attorney in TrackerPro corresponding to the chosen Covered Party.



The list of available Additional Participants will initially only be viewing the Agent's Favorite Participants. By adjusting the View you could Search for any of the Additional Participants currently available. If you need to add any Additional Participants not available in Stewart's System please contact your Stewart Representative.

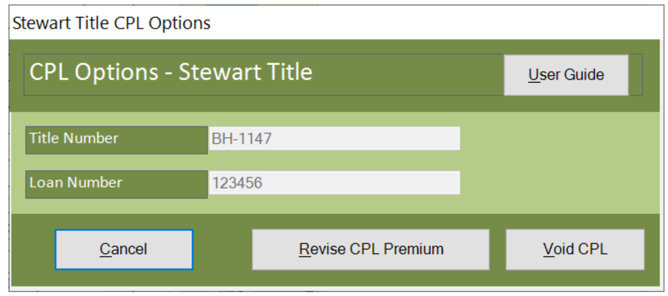


4) Click the Download Now button. The CPL will be generated, downloaded and saved in the TrackerPro File Cabinet for the current application. The user may send the letter out as needed using any of the standard TrackerPro methods.

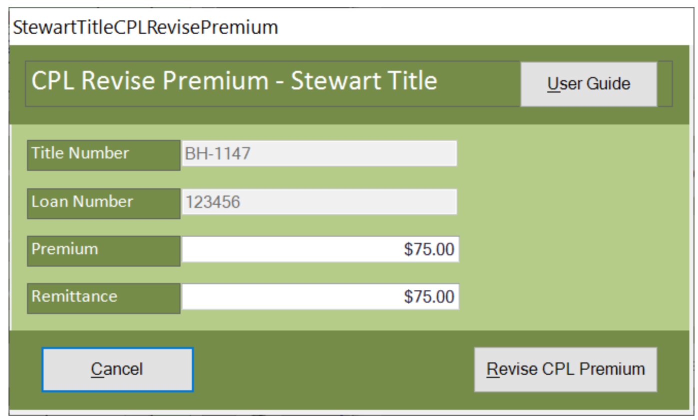
Void/Revise CPL/EJacket

Once a CPL or EJacket has been created the corresponding buttons will change in Void/Revise buttons. These will allow you to adjust what you had previously created.

The CPL will allow you to Void the CPL or Revise the CPL Premium.



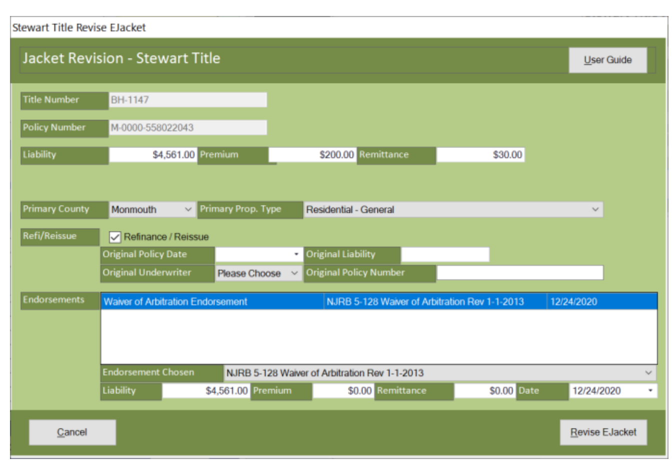
A CPL would not have a Premium to revise until it has the corresponding EJacket created. Some states may not have a Premium on the CPL to Revise.



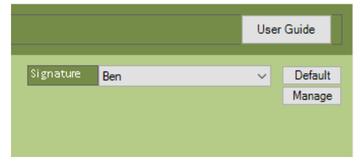
The EJacket will allow you to Void the EJacket, or to make limited Revisions to the EJacket. For convenience we also provide a button here to Revise the CPL Premium, if there is a CPL issued on this policy.

Revise EJacket is Coming Soon

The only fields that are revisable on the EJacket are the Liability, Premium, Remittance, Primary County, Primary Property Type, Refi/Reissue Information, and Endorsements. If you wish to modify any other information you must Void the EJacket, and then issue a new EJacket.



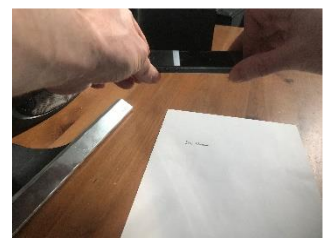
EJacket Signatures



To include an electronic signature on the EJacket you can choose the signature from the dropdown in the top-right of the EJacket Step 2. There is a Default button to mark that signature to be used automatically in the future, and a Manage button to control the list of signatures available.

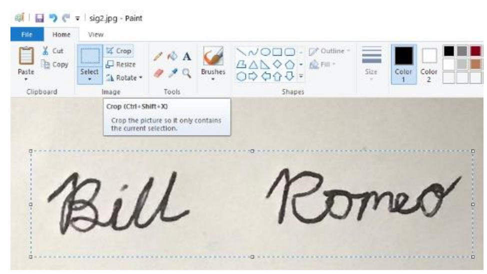
The Manage Signatures Screen lets you very easily add/remove signatures from your system, however we do understand that this might be something that people are more comfortable with TrackerPro's Support Department being involved. Our Support Technicians can either assist you in the process, or we could conceivably do it for you.

To Add a Signature you just supply a name for the signature, and the signature as an image file. This image file must be a PNG of JPG image. PDF and GIF file types are not supported for the Stewart Title Signatures, although if you have your signature in either of these formats it is very easy to change it into a PNG. An important step in adding the signature is to properly prepare the image file first by cropping out any extraneous elements that are not part of the signature itself. You will also want to test the signature file by creating an EJacket, to make sure it looks good on the document.



While there are several ways to get a prepared image file, the following is our suggested steps. While the process might seem involved, each step is very easy:

1) Sign a plain white piece of paper.
2) Take a picture with your smartphone. You do not need to worry about making the signature fill the entire picture.
3) Email that picture to yourself.
4) Save that picture to your computer's desktop.
5) Open that picture with any image editing software such as Microsoft Paint.
6) Crop the picture so that only the signature remains and save the picture.
7) Use the Manage Signature area to add the signature to TrackerPro.



Note: You could crop the picture on your smartphone before emailing it to remove steps 5 and 6