



AIM+[®] 6.6.2
for Affiliate Users Only

Release Notes

July 21, 2017

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AIM+ 6.6.2 Release Notes

AIM+ 6.6.2 includes additional functionality, enhancements, and defect corrections. This document provides users with a brief explanation of what was fixed, and an introduction to new features and functionality implemented with this release.

Deployment Date: July 21, 2017

Closing

Suppressing the Header of CD on Lender Connect Files

For Affiliate Users Only

In order to improve Stewart's SLA agreements with Lenders, Lender Connect users will notice the following change related to the Closing Disclosure.

Once the electronic Closing Instructions (431) has arrived from the Lender, it is critical to collaborate by adding/updating fee details to the file. Users are then expected to navigate to Lender Connect and return the updated CD to the lender by selecting **Submit CD to Lender**.

Starting **Monday, August 7, 2017**, Stewart Affiliate Lender Connect users with electronic Closing Instruction (431 event) on the file will notice the Header details of the CD are blank. The CD Header will remain blank until the user has followed the defined process by updating the file where needed, and then by submitting the CD to the Lender electronically through Lender Connect on the file.

AIM+ will inform the user with messages when opening the file, when opening the Closing module, and before printing the CD electronic Closing Instructions present and Submit CD to Lender is pending.

Users can print or save the Closing Disclosure with the header hidden. However, you cannot send the file electronically while the Submit to Lender event is pending.

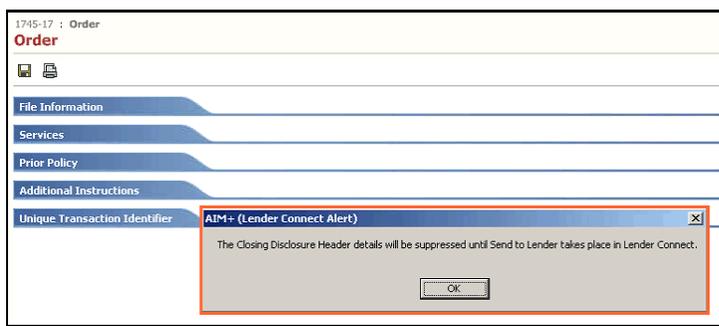
Alerts and Notifications

Steps

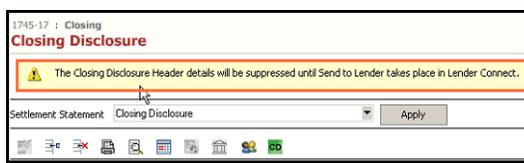
1. From AIM+, click the **Order** screen.

Upon opening a REALEC/Closing Insight order in AIM+, a pop-up displays indicating that the Closing Disclosure Header details will be suppressed until the Submit to Lender event takes place in Lender Connect. This pop-up also confirms the Submit to Lender event on the order is still pending.

2. Click **OK** to continue.



3. Click to open the **Closing** module. The Closing screen displays with a yellow warning message across the top of the screen, to once again notify the user that the Closing Disclosure Header details will be suppressed until the **Submit CD to Lender** button is clicked in Lender Connect.

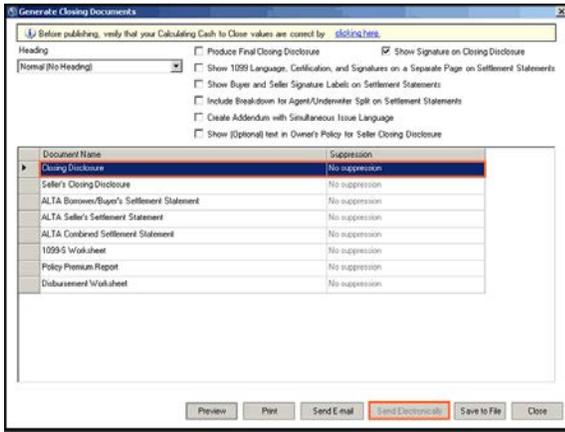


- Select the **Closing Disclosure** from the *Settlement Statement View* and click **Preview**. The Closing Disclosure displays with the Header suppressed.

You can also view the Closing Disclosure with a suppressed header by clicking the **Print** button on the Closing screen.



The Generate Closing Documents pop-up displays. The Closing Disclosure (for Purchase or Refinance) are the only documents that have the suppressed header enabled. From this pop-up you can print, preview or save this copy of the Closing Disclosure with a suppressed header. However, you cannot send the copy electronically, as this button is disabled (until the Submit CD to Lender event is complete).



Once previewed or printed, the Closing Disclosure displays without header information, until Submit CD to Lender is completed.

Loan Terms		Can this amount increase after closing?
Loan Amount	\$0	NO
Interest Rate	3.875%	NO
Monthly Principal & Interest <i>See Projected Payments below for your Estimated Total Monthly Payment</i>	\$761.78	NO
Does the loan have these features?		
Prepayment Penalty	YES	As high as \$3,240.00 if you pay off the loan during the first 2 years.
Balloon Payment	NO	
Projected Payments		
Payment Calculation	Years 1 - 7	Years 8 - 30
Principal & Interest	\$761.78	\$761.78
Mortgage Insurance	+ \$62.35	+ -
Estimated Escrow <i>Amount can increase over time</i>	+ \$201.33	+ \$201.33

Lender Connect

Receiving and Responding to Loan-level and Fee-level Comments

TFS21975

Affiliate and Independent Agency users can now receive comments sent from lenders on either the Loan-level or the Fee-level.

Lenders have the ability to send comments on the Loan-level or Fee-level with the Closing Instructions, Modified Closing Instructions and Final CD. Users responses or initiated comments are sent with the successful **Submit CD to Lender** action.

Viewing and Responding to Loan-level Comments

From *Lender Connect*, users can now view loan level comments received from lender in the Closing Instructions (431), Modified Closing Instructions (432) and the Final CD (435).

Comments received with the 431, 432, 435 event(s) are identified with "Loan" in the Comments column in the **Comments History** grid.

Notice there is **Product** column. The purpose of this column is to identify the Product (Title, Product, Doc Sign) for which the comments are received or sent.

View Loan Level Comments

Steps

1. Navigate to the Comments history grid.
2. Look for any comments with Loan in the Comment column. These are the comments received with the 431, 432, 435.



Comments	From Le...	Sender	Product	Comme...	Date & Time
loan level comment from provider	No	Office	Closing	Loan	05/23/2017 8:55 AM
new comment for the provider	Yes	N/A	Closing	Comment	04/19/2017 10:24 AM
some loan level comments added in 432 event	Yes	Lender	Closing	Loan	03/18/2017 9:49 AM



Note

Before this change, users were allowed to send comments without performing the Submit CD to Lender actions. These comments are more instant. This feature remains in place. To send such comments:

Steps

1. Enter the comment in the Enter Comments to Lender dialog box.
2. Select the Product (Title, Closing, Doc Sign).
3. Select Note to Lender, or Comment and Require Response.

Respond to or Initiate Loan-level Comments

Follow the steps below to respond to or initiate a loan-level comment.

Steps

1. Enter/update Fees on the AIM+.
2. Navigate to **Lender Connect**.
3. Enter the Loan Level Comment in the **Enter Comments to Lender** dialog box.
4. Click **Submit CD to Lender** and complete the process.

Comments	From Le...	Sender	Product	Comme...	Date & ...
loan level comment from provider.	No	Office	Closing	Loan	05/23/2017 8:55 AM
new comment for the provider	Yes	N/A	Closing	Comment	04/18/2017 10:24 AM
some loan level comments added in 432 event	Yes	Lender	Closing	Loan	04/18/2017 9:49 AM

Viewing and Responding to Fee-level Comments

AIM+ users now have the ability to receive and send comments on each fee.

Steps

1. Navigate to the Closing.
2. Select a Fee.
3. Click the **Fee Level Comments** button to view lender comments.

Once a fee is saved, the user will know if the lender sent a related comment by viewing the color of the new Comments icon.

If there are comments from the lender on any added fee, the icon will be green. Lender comments display in dark blue font.

Loan Discount Points

Line Number: 802

Fee: Loan Discount Points

Send Comments

Enter Comments

Enter

Clear

Comments Tree

Lender Comment <8/17/2015 9:07:00 AM>

Please review amount

Delete Last Unsent Comment

Print

Cancel

If there are no comments from the lender on any added fee, the icon will be blue.



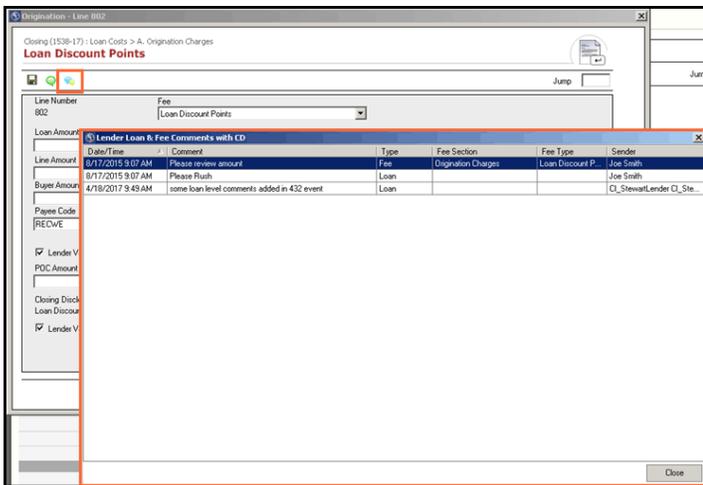
If no comments are sent from the Lender, you can click the Comments dialogue box to initiate the conversation. Simply type your comment into the **Enter Comments** text box, and click **Enter** to send the comment.



Until the related 406/433 is sent, you can click **Delete the Last Saved Comment** to remove a pending comment.

View All Comments

Another icon, **Loan and Fee Comments**, has been added to view all comments, regardless of the fee. Click the new icon (from any fee). The Loan and Fee Comments pop-up displays details of comments, Fee sections, the Fee Type and Comment Sender.



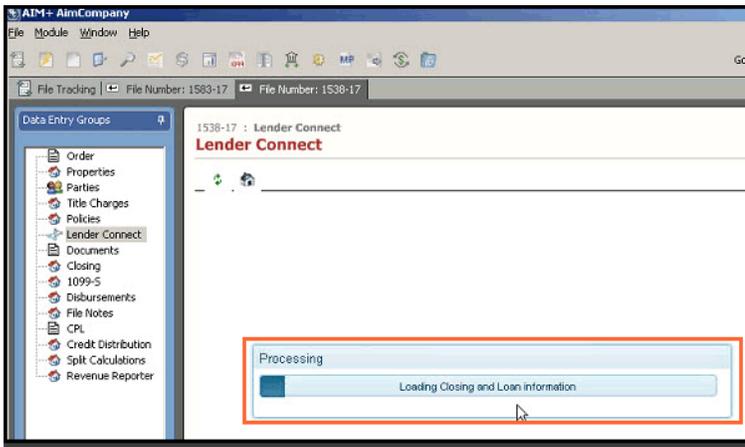
Pre-Loader on the Compare & Update Screen

INC0440727

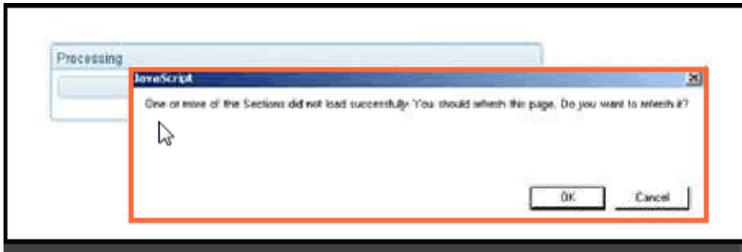
INC0451153

TFS23319

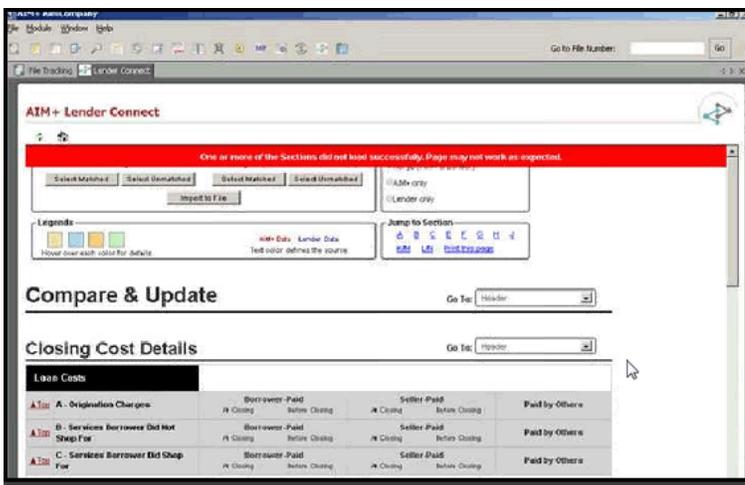
To improve user experience, the **Compare and Update** screen now displays a pre-loader, indicating the progress of the fees loaded on the screen in Lender Connect.



The pre-loader directs the user to try again when loading issues are realized by Lender Connect. Click **OK** to continue.



If after three tries, there is still not a successful screen load, a red ribbon displays at the top of the Compare and Update screen.



Additional Information

Accessing AIM+

You can access AIM+ one of two ways depending on your setup:

- *If you access AIM+ through the Citrix environment, AIM+ is automatically updated to the latest version when you log in. If you are new to StewartWorkPlace or TitleWorkPlace, contact Customer Care at 1.877.800.3132 for assistance.*
- *If you are using AIM+ in a Citrix environment, maximize the Citrix screen and the AIM+ screen for best viewing results.*

Training

Through the AIM+ Help Contents, you can access an online library of interactive tutorials and quick reference cards by clicking the **Additional Learning Resources** link or navigate to the [AIM+ Training Center](#) page.

Technical Support

For technical support, contact Stewart Customer Care Center at 1.877.800.3132 or CustomerCareCenter@stewart.com.