Using Encompass with AIM+

User Guide

For Stewart Affiliates only

November 12, 2017

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Table of Contents

Introduction

This document provides user instructions for processing orders from Ellie Mae's Encompass application with AIM+ Lender Connect. Instructions include receiving new orders, and sending notifications and documents to Lenders relating to Encompass orders.

Prerequisites

As a prerequisite, you must have Encompass enabled for your company~~.~~

TEFS users are responsible for enabling Encompass, and accepting new orders for Affiliates within the Encompass portal.

Stewart Affiliates are responsible for processing orders within AIM+ Lender Connect. Email notifications will be sent to you from commonworkflow@stewart.com regarding orders.

Using the Encompass

Effective **October 6, 2017** AIM+ Affiliate sites currently receiving electronic orders from Lenders through RealEC have the ability to start receiving electronic orders from Lenders that utilize the Ellie Mae Encompass application.

Encompass Lending Platform is Ellie Mae's Loan Origination System (LOS). A few highlights about Encompass include:

- 165,000 Active Users
- Over 35% of Mortgage Originations completed by lenders using Encompass in 2016
- Ellie Mae is seeing increased demand from lenders to support title ordering, fulfillment, rate generation, and document exchange within Encompass

To perform tasks on an Encompass order, *Stewart Affiliates* use **Lender Connect** within **AIM+**, and the TEFS Encompass Oversight Team use Encompass portal.

Company-level vs. File-level Access

Company-level permission and File-level permission determines what tasks can be completed when processing Encompass orders. Stewart Affiliates (Direct Office users) need **File-level permissions** to perform tasks on the file in AIM+ Lender Connect. File-level users <u>cannot</u> accept new orders.

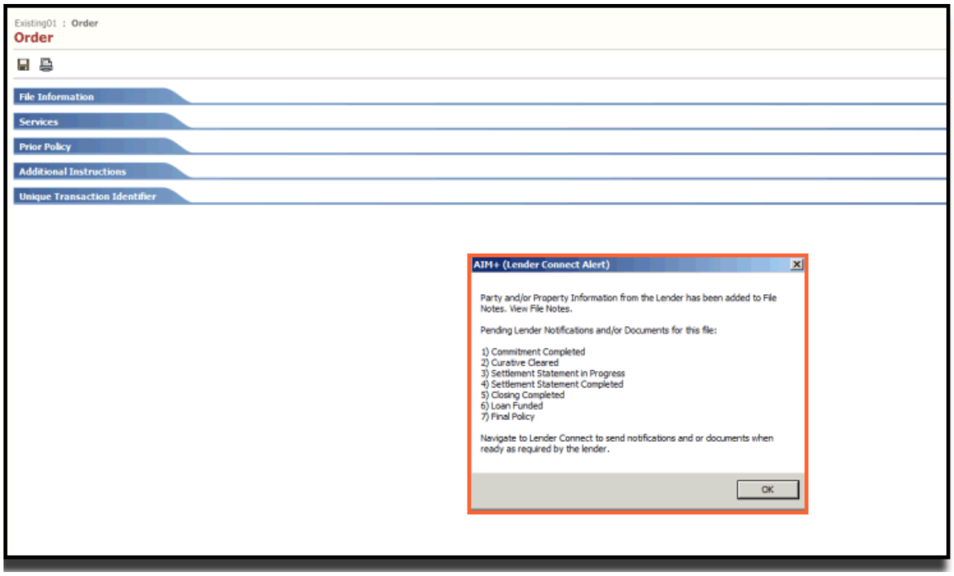
See the table below for a brief explanation of access and responsibilities:

User Type	Permissions/Access	Responsibility/Tasks to Complete Based on Permissions
Stewart Affiliates	• File-level access only to use Lender Connect within AIM+	• Once new order notification is received via email from commonworkflow@stewart.com , perform tasks on the file such as sending notifications and documents via Lender Connect. • View Notes received form Lender in Lender Connect.

Pending Notifications for File-level Users

AIM+ File-level users working Encompass files will notice a pop-up message display of pending notifications with documents and information. This notification displays any time the file is open.

The File-level notifications are updated as they are responded to. Notifications end when all tasks/notifications for the file are submitted to the Lender, or the Lender has cancelled the order.



Order Data Entry with Encompass

For linked files, data from an Encompass order flow to *File Notes*.

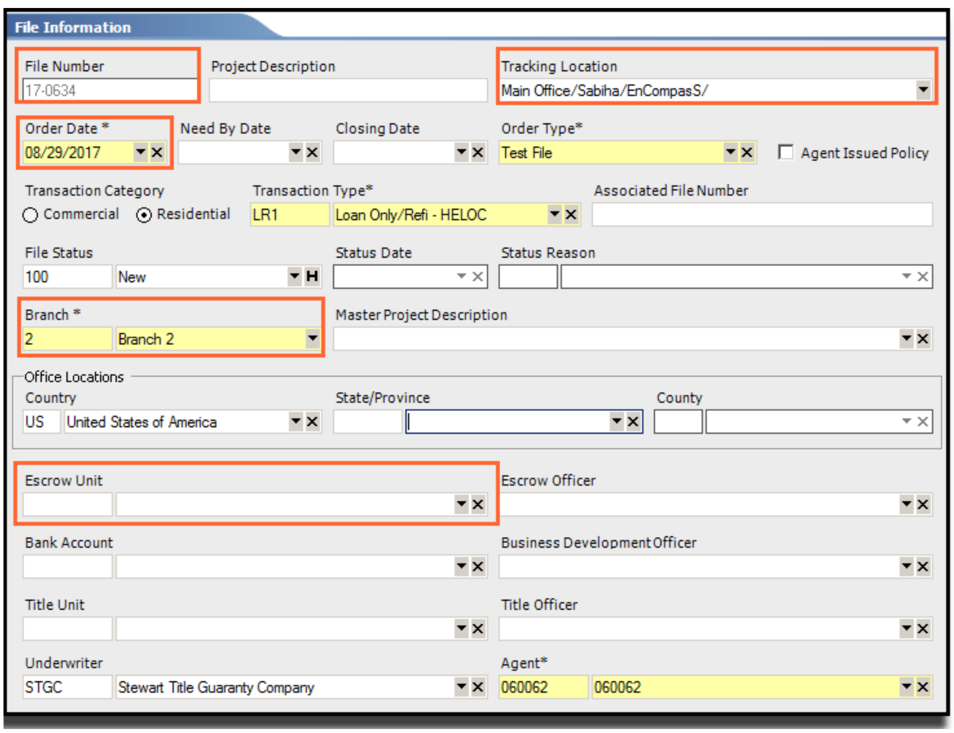
For newly created AIM+ files, data from an Encompass order flows to three modules in AIM+: *Order Entry*, *Properties* and *Parties*.

Order Entry

From the *Order* screen, if the Encompass order is linked to an AIM+ file, then no data on the existing file's *Order* screen changes.

If the AIM+ file is new, then the following will for be set when accepting the Encompass order and creating the new AIM+ file:

- File Number
- Tracking Location
- Order Date
- Branch
- Escrow Unit (*optional*)



Properties

If the AIM+ file was created upon the acceptance of the order, the Property Address information sent will map to specific fields. The Property Address information maps to different fields, depending on two scenarios.

Scenario 1: Where ESB sent Property data in different fields

In this scenario, the following fields are populated with Property Address information:

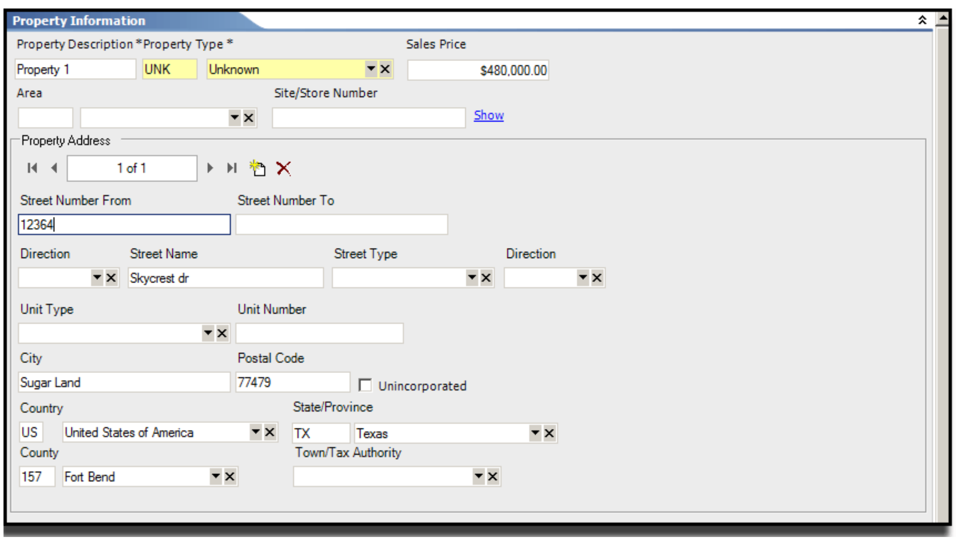
- Street Number From
- Street Name
- Street Type
- Unit Number
- City
- Postal Code
- Country
- State
- County

Scenario 2: Where ESB sent Property data in just single field

In this scenario, the following fields are populated with Property Address information:

- Street Name
- City
- Postal Code
- Country
- State
- County

If the order is linked to an existing AIM+ file, then the Property Address information flows to *File Notes*.



Parties

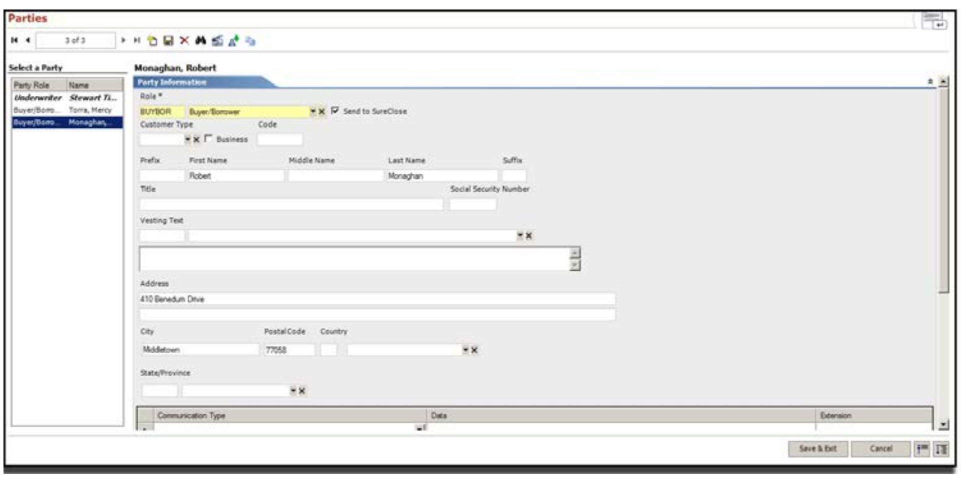
If the AIM+ file was newly created upon the acceptance of the Encompass order, then the Borrower/Buyer and CoBorrower/Co-Buyer information maps to the following fields:

- Role
- First Name
- Middle Name
- Last Name
- Address
- City
- Postal Code

If the Encompass order is linked to an existing AIM+ file, then the Borrower/Buyer and CoBorrower/Co-Buyer information flows to *File Notes*.

Note

Lender information is not populated in *Parties* or *File Notes*.



Working Encompass Orders from the File-level

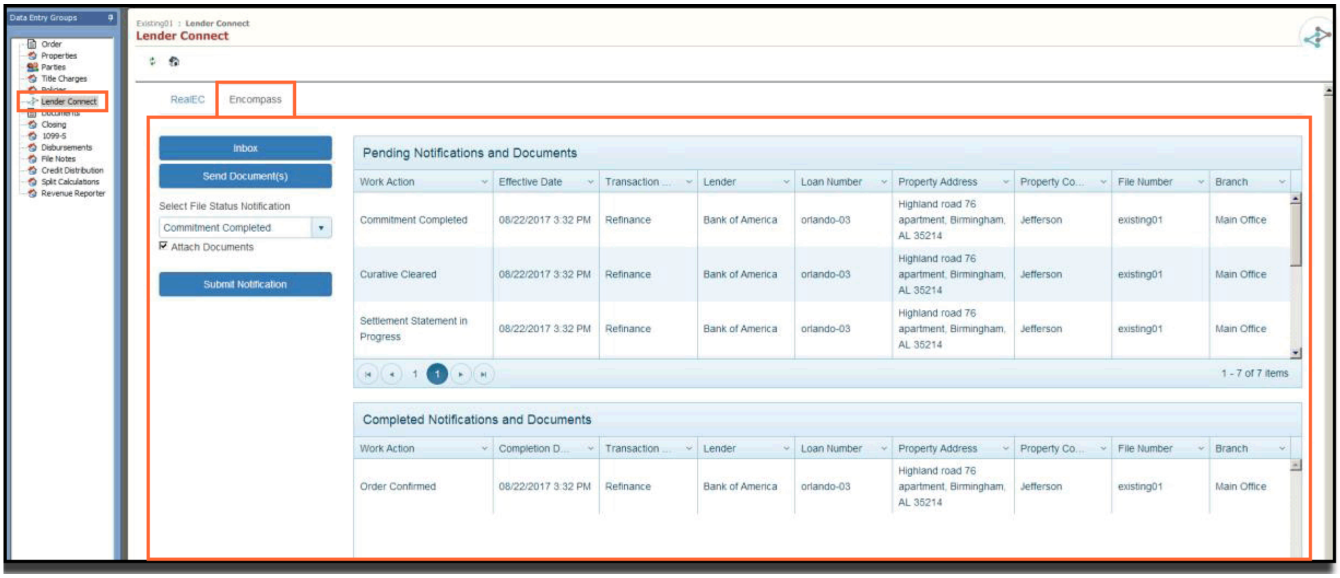
With the Encompass integration with AIM+, it is important to note that the title, closing and policy business processes do not change. What changes is the means of communication with the Lender.

Lenders want to see where you are in the order process and with documents. Encompass users will use this screen for sending related notifications and documents. Using the same screen, any notes sent from the Lender can also be viewed by AIM+ users.

To access Encompass from the File-level, click the **Lender Connect** module on the left navigation menu. The Encompass tab displays a screen that details the notification status (Completed and Pending) as well as documents available on the order. More specifically, the File-level user, you can view the following items from this screen:

- All pending notifications and/or documents
- All completed notifications and/or documents
- Notes from the lender

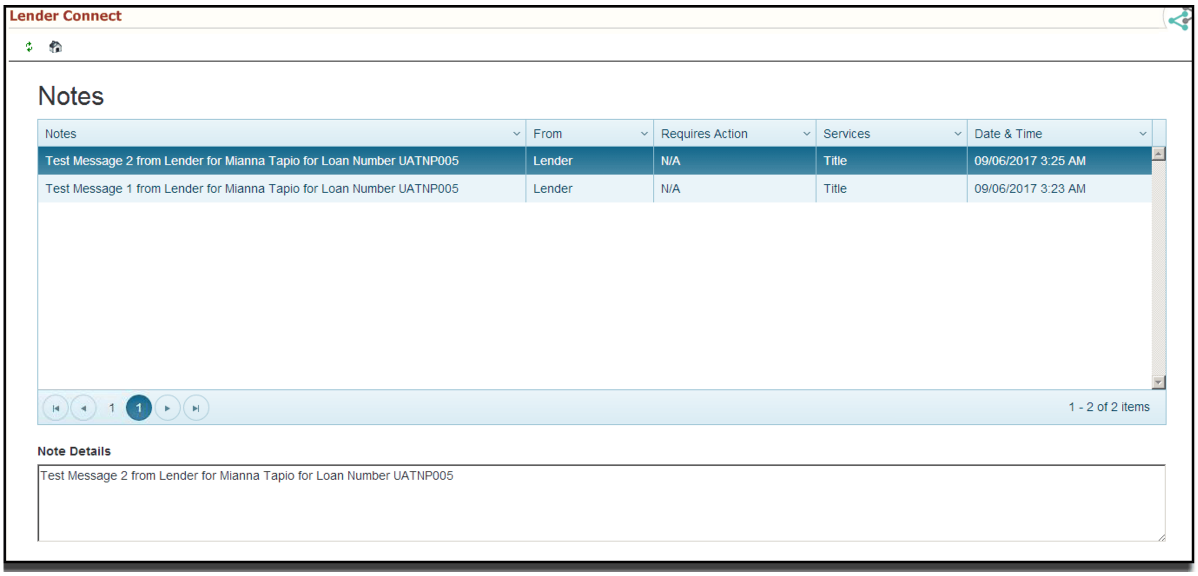
As a File-level user on this screen, you can also send documents, and order notifications/statuses.



Viewing Notes and Messages

Currently, communication is only one way: **Lender to AIM+ file**. As the File-level user, you currently do not have the ability to initiate or respond to a Lender message. All Notes sent from Lenders go directly to the inbox on the *Lender Connect File-level* screen.

Once the order is placed by Lender they can send notes to the inbox. To view notes from the lender, simply click the **Inbox** button. The *Notes* screen displays and stores a history of Notes.



Sending Notifications with Documents

The section below explains how to send notifications with documents to the Lender.

Note

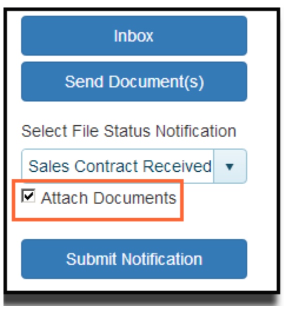
All the documents that have been sent to the Lender display on the **Attach and Submit Documents** screen in *Document Work History* grid.

Users can send same notification more than once by following the steps explained in below sections.

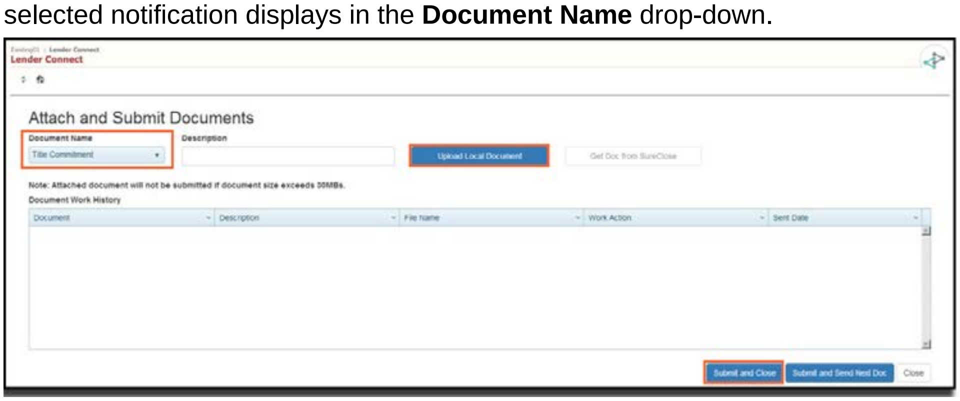
Sending a Notification with One Document Attached

Steps

1. From the *Lender Connect screen*, use the **Select File Status Notification** drop-down to select the desired notification such as *Commitment Completed* to be sent to the Lender.
2. If the system recognizes the notification as one that requires a doc, the system auto selects the **Attach Documents** checkbox. The user can deselect if no document is to be added.

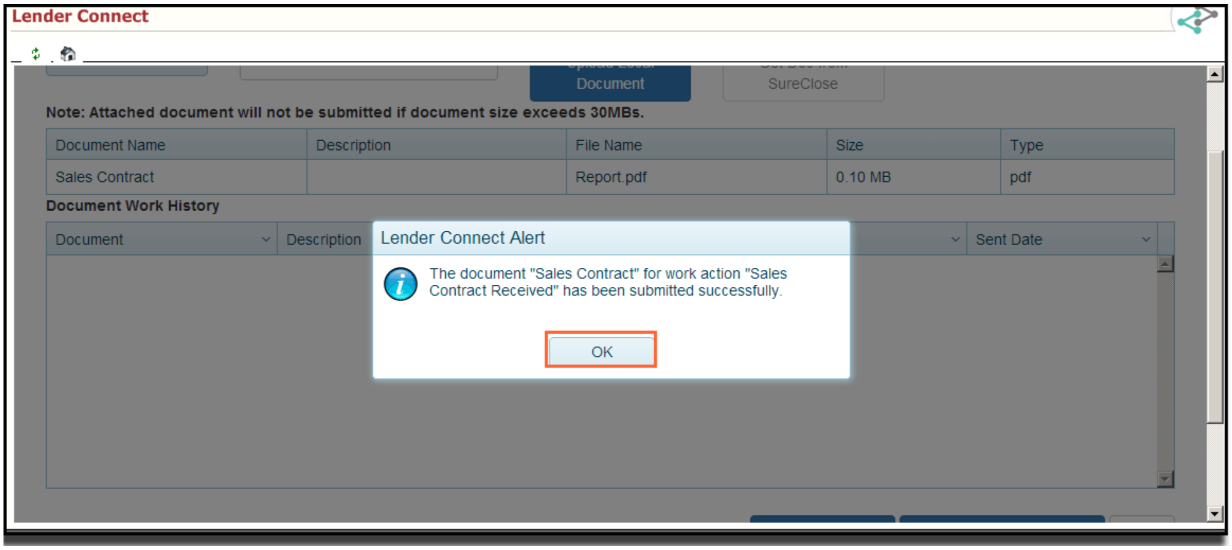


3. Once a selection is made, the *Attach and Submit Documents screen* displays. The document associated to the selected notification displays in the **Document Name** drop-down.



4. Click the **Upload Local Document** button.
5. Enter in any description (if required) in the **Description** textbox.

6. Once the document is uploaded and attached to the order, click **Submit and Close**.
7. A *Lender Connect Alert* pop-up displays, confirming the document and notification are sent.
8. Click the **OK** button.

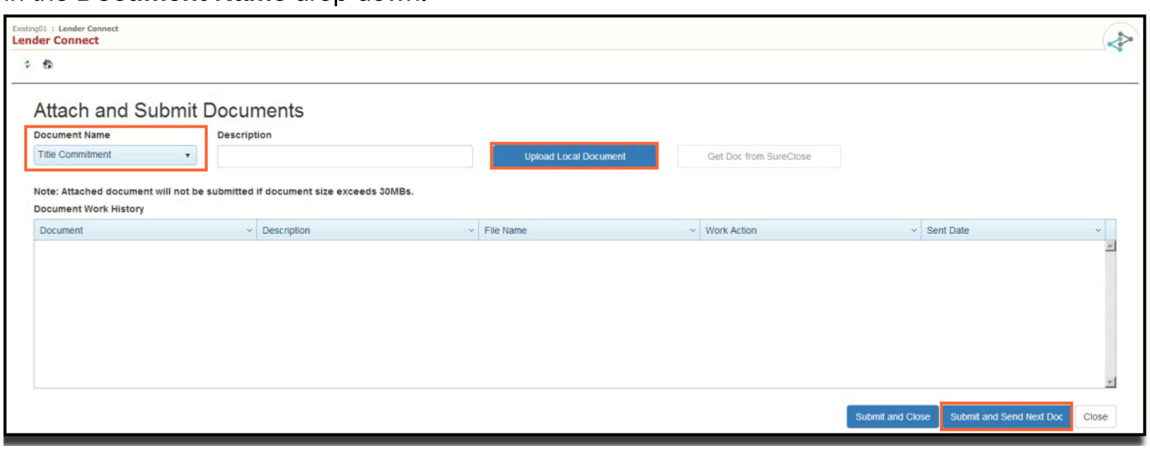


9. The document is added to the **Document Work History** grid. The lender then receives the document and the notification sent.

Sending a Notification with Multiple Documents Attached

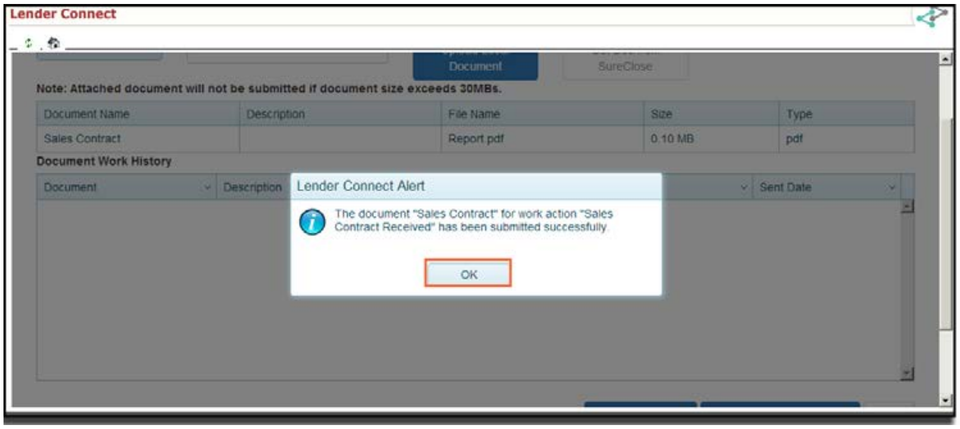
Steps

1. From the *Lender Connect screen*, use the **Select File Status Notification** drop-down to select the notification type to be sent to the lender.
1. Click **Submit Notification** button.
2. The *Attach and Submit Documents* screen displays. The document associated to the selected notification displays in the **Document Name** drop-down.



3. Click the **Upload Local Document** button to add and attach a document.
4. Type in any description (if required) in the **Description** textbox.
5. Click the **Submit and Send Next Doc** button.
6. A *Lender Connect Alert* pop-up displays, confirming that the document and notification have been sent.

7. Click the **OK** button.



8. Click **OK** button.
9. The document displays in the **Document Work History** grid.
10. The lender then receives all of the documents sent from AIM+.
11. For adding more than two documents, simply follow steps 4- 8 above. You can change the **Document Name** and description for each documents that user uploads.

Sending a Notification without a Document

Follow the steps below to send a notification (without a document) back to the Lender:

Steps

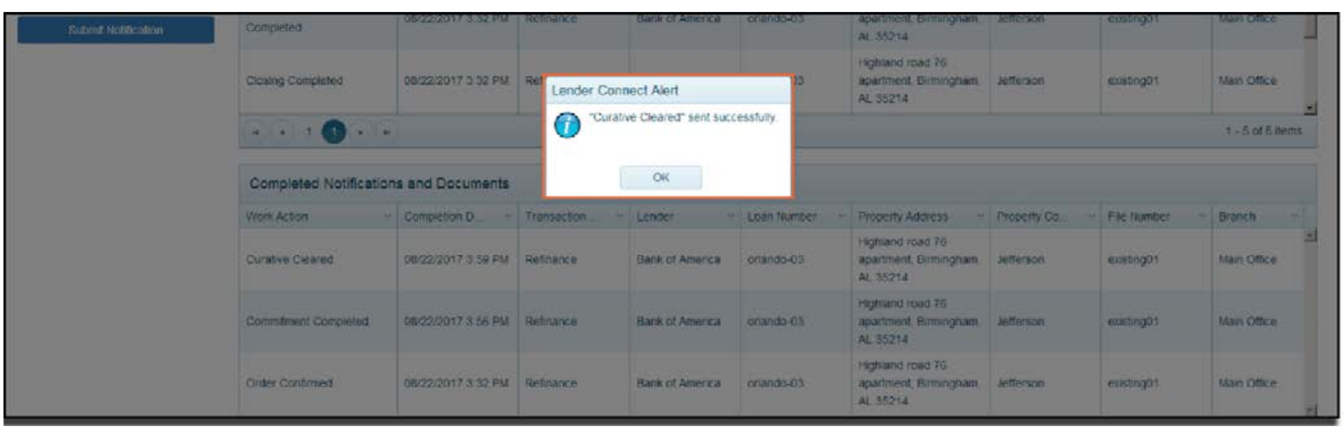
1. From the *Lender Connect screen*, use the **Select File Status Notification** drop-down to select the notification type to be sent back to the lender.
2. If the system recognizes the notification as one not requiring a document, then the **Attach Documents** checkbox is <u>not</u> auto-selected.

   If the system recognizes the notification as one that requires a document, then the **Attach Documents** checkbox will be selected. Deselect this checkbox.

3. Once a selection is made, click the **Submit Notification** button.

   A *Lender Connect Alert* pop-up displays, confirming the notification sent. The notification will be moved from the Pending Notifications grid and into the *Completed Notifications* grid.

4. Click **OK** to continue.



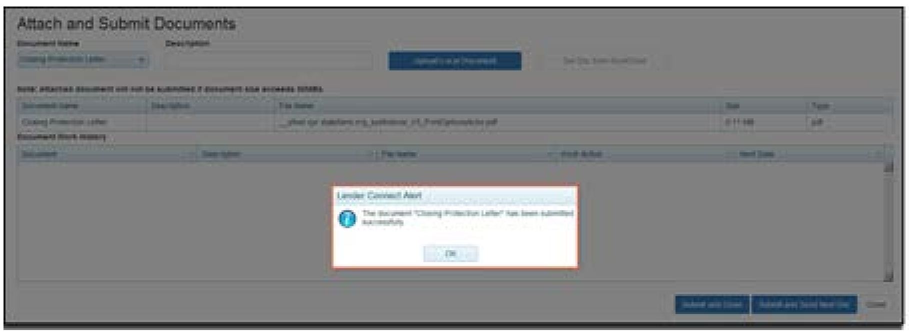
Sending a Document to a Lender

You can also send a document to a Lender, without sending a notification or status.

Steps

1. From the *Lender Connect screen*, click the **Send Document(s)** button.

2. Use the **Document Name** drop-down to select the document type.
3. Click the **Upload Local Document** button to attach the document.
4. User can provide any description (if required) in the *Description* text box.
5. When finished, click **Submit and Close**. A pop-up displays confirming the document was sent.



6. Click **OK** to continue.
7. The document will be added to the *Document Work History* grid. The lender then receives the document attached.

Checking the File-Level Pending and Completed Grids

To view outstanding work user can view *Pending Notifications and Documents* grid for that order.

To view completed work user can view *Completed Notifications and Documents* grid for that order.

Pending Notifications and Documents

Work Action	Effective Date	Transaction ...	Lender	Loan Number	Property Address	Property Co...	File Number	Branch
Settlement Statement in Progress	08/22/2017 3:32 PM	Refinance	Bank of America	orlando-03	Highland road 76 apartment, Birmingham, AL 35214	Jefferson	existing01	Main Office
Settlement Statement Completed	08/22/2017 3:32 PM	Refinance	Bank of America	orlando-03	Highland road 76 apartment, Birmingham, AL 35214	Jefferson	existing01	Main Office
Closing Completed	08/22/2017 3:32 PM	Refinance	Bank of America	orlando-03	Highland road 76 apartment, Birmingham, AL 35214	Jefferson	existing01	Main Office

1 1 - 5 of 5 items

Completed Notifications and Documents

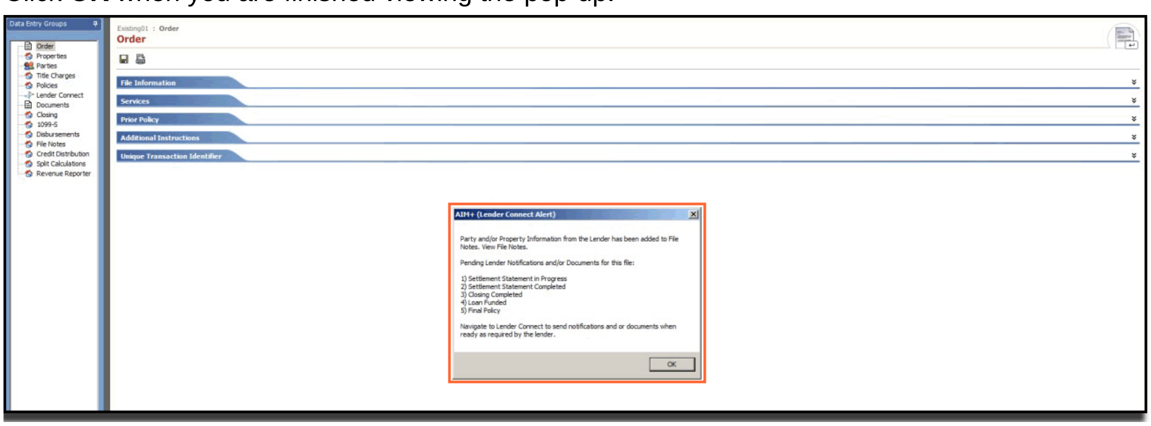
Work Action	Completion D...	Transaction ...	Lender	Loan Number	Property Address	Property Co...	File Number	Branch
Curative Cleared	08/22/2017 3:59 PM	Refinance	Bank of America	orlando-03	Highland road 76 apartment, Birmingham, AL 35214	Jefferson	existing01	Main Office
Commitment Completed	08/22/2017 3:56 PM	Refinance	Bank of America	orlando-03	Highland road 76 apartment, Birmingham, AL 35214	Jefferson	existing01	Main Office
Order Confirmed	08/22/2017 3:32 PM	Refinance	Bank of America	orlando-03	Highland road 76 apartment, Birmingham, AL 35214	Jefferson	existing01	Main Office

1 1 - 3 of 3 items

After sending one or more notification(s) if user reopens AIM+ order, all File-level notifications that are completed do not display on the *Pending Notification and Document Reminder* pop-up. Only remaining notifications display.

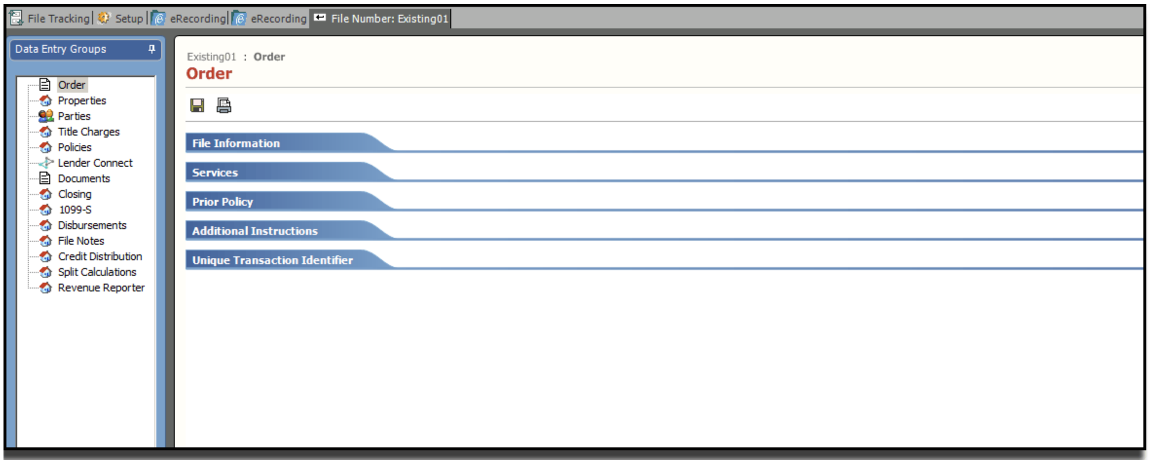
Steps

1. From *AIM+,* on the **Order** screen, locate the file number of the order. The *Pending Notification and Document Reminder* pop-up displays. The pop-up lists all the notifications pending and yet to be finished.
2. Click **OK** when you are finished viewing the pop-up.



3. Return to **Lender Connect** to process the remaining work indicated on the *Pending Notification and Document Reminder* pop-up.

4. When all remaining work is completed, reopen the file.
5. From the **Order** screen, no *Pending Notification and Document Reminder* pop-up displays.

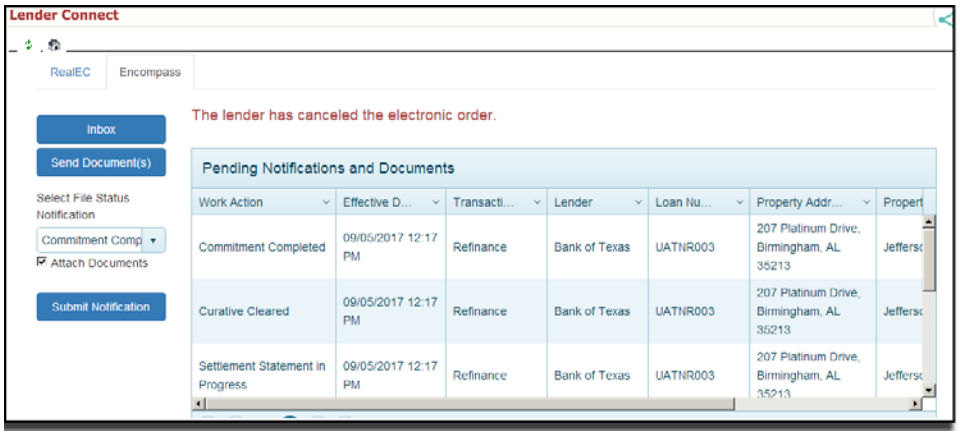


Canceled Orders

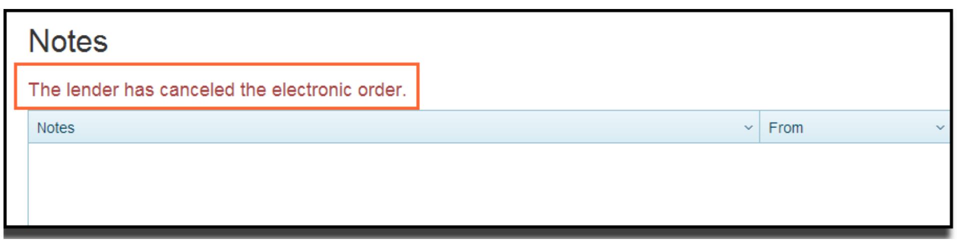
Viewing Canceled Orders from the File-level

If you are using Lender Connect/Encompass Portal at the File-level, you will be notified if the Lender cancels an order. You will see notifications in red on three screens, indicating that the Lender has cancelled the order:

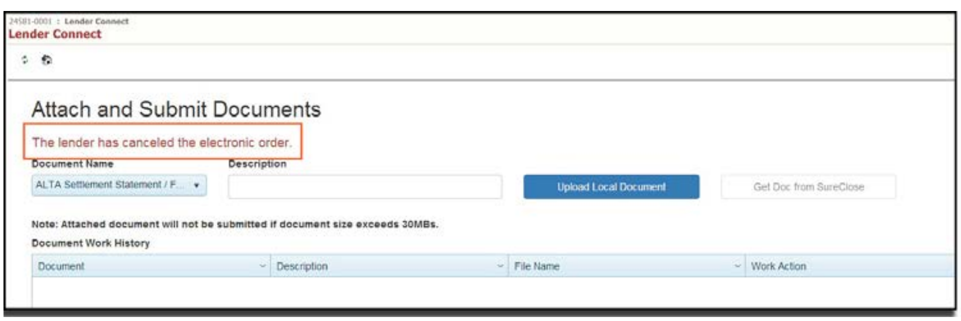
File-level Screen:



Notes Screen:



Documents 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.