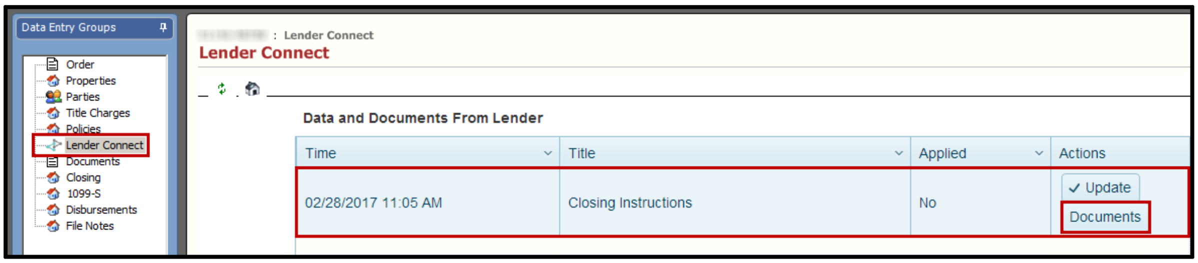
Lender Connect Closing Collaboration

Overview

Follow the steps below to collaborate your AIM+ file in Lender Connect.

Steps

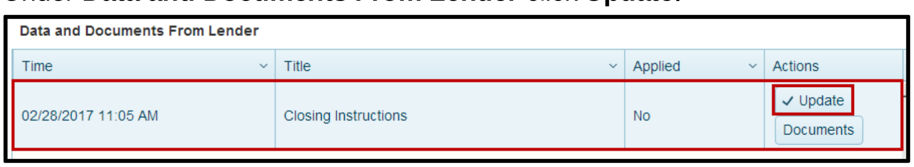
1. Open the file and go to the **Lender Connect** data entry group.
2. Under Data and Documents From Lender click the Documents link.



3. Click **View** for each PDF document to view/save/print. Close the window when finished.

Note: The XMLs listed in the documents will not open an actual document. In the case of a modification request, XML may be the only option. Print the page in the Update to see what the lender has modified.

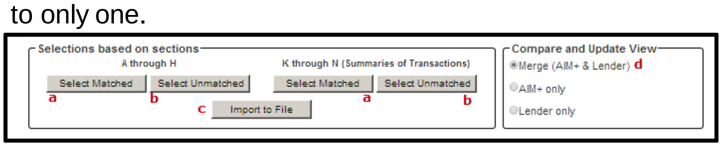
4. Under **Data and Documents From Lender** click **Update**.



5. The top of the screen allows options and a key to reading the details below.
6. Click **Select Matched** to check lines that match between AIM+ and the lender data.
7. Click **Select Unmatched** to check lender data lines that do not match the AIM+ data.
8. Click the **Refresh** button to clear the Matched or Unmatched selection. 

Note: Selecting all Unmatched items and importing may create duplications in the CD. Verify your chosen selections prior to importing.

9. Click **Import to File** after reviewing all lines and making selections you want to import.
10. By default the screen will show all AIM+ data (in red) and all lender data (in blue). Check the radio buttons to limit the screen to only one.



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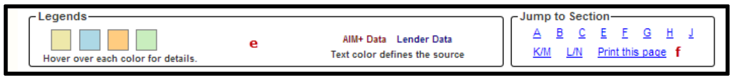
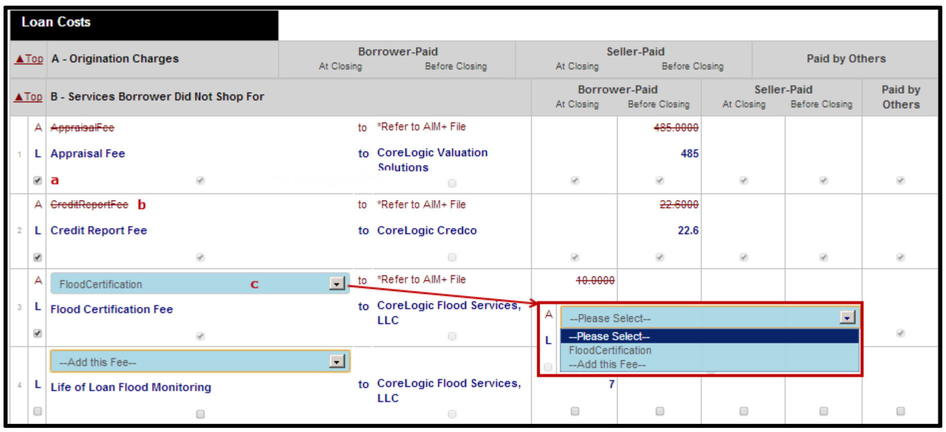
11. Under Legends the color-coding key provides explanation of the different colors in the details and text.
12. The Jump to Section area provides links to jump to a specific section of the CD details or to Print This Page.
13. Scroll down through the list of line items.



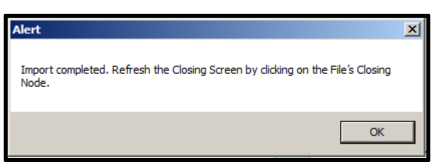
14. Check the box on the left for each lender fee you are accepting.
15. The AIM+ fee will appear crossed out and will be overwritten.
16. Selection lists will either allow you to choose the fee description or add the fee (blue selection field), or choose a fee entered in AIM+ and combine (yellow selection field).



17. Line items in green indicate fees that will always be required on the CD whether they contain a fee or not. If items in green need to be modified in the AIM+ closing data, it may require manual entry if the fee does not allow a check to select.

18. Line items that only show AIM+ fees indicate a fee the lender does not have or has but in a different selection. If the section needs to change edit the closing details in the Closing data entry group.
19. When review and selection are complete click **Import to File** prior to leaving the Update screen to save your selections.

20. A pop up verifies the import was successful. Click **OK**.



21. Go to the **Closing** data entry group.

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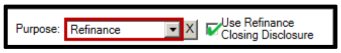
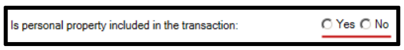
22. Edit closing details as needed, removing any duplication, updating sections in line details, modifying any lines that require manual modification.
23. Click on the green **CD** button.

24. In the first tab for Loan Terms select the Purpose of the Loan. If the Purpose is Refinance also check the **Use Refinance Closing Disclosure** option to balance the Cash to Close.



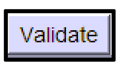
25. Go to the Additional Items tab and check the applicable radio button for Personal Property.



Note: Failure to select the Personal Property will cause a flag when submitting the CD to the lender.

26. Click **Save & Exit**.
27. Print Preview the CD. Previewing saves a PDF version of the CD in the file that will transmit back with the data when you submit the CD.
28. Return to the **Lender Connect** data group and click **Submit to Lender**.

29. The CD will generate in the screen allowing a final review prior to submission. Click **Validate** after reviewing.



30. The last screen will show any **Hard Stops** or **Flags**. **Hard Stops** indicate items that must be fixed or the CD will not submit. **Flags** indicate lines that need attention, but will not stop the submission of the CD, however it is important to eliminate as many as possible. **Flags** may include line items that have a line type of Other, missing proration dates, or differences between AIM+ and lender data.
31. The bottom of the final screen allows entry of the closing office and escrow officer licensing data. It is not necessary to complete unless the lender requests it or you notice it missing from the CD.
32. Click **Submit**.
33. A message pops up to confirm the submission of the CD.