

Lender Connect Access

To access Lender Connect on both the company level and file level, permission must first be given. Contact CustomerCare@Stewart.com if access is needed.

Users who will collaborate on the fees in the Closing Disclosure with a lender through Closing Insight must be granted company level permission in order to launch to the Closing Insight portal from Lender Connect once they submit the 406 event. This permission allows the user to analyze data, review flags and findings and submit updates to the lender.

Company-Level Access



NOTE: If branch-level security is enabled, and multiple branches exist, when you are granted company-level access to Closing Insight all orders associated with a location display regardless if this setting is turned on. Additional security options will be added in a future release to address this issue.

Users with file level permissions can update fees on the Closing Disclosure to start the collaboration process by submitting a 406 event. However, they will not have permission to launch the Closing Insight portal to submit the Closing Disclosure to the lender.

File-Level Access:



Closing Instruction Fee Comparison and Update

Event(s) included are Inbound 431 - Closing Product and Outbound 406 - Send initial Closing STMT Draft.

Steps

1. Receive Closing Instructions with fee data from Lender via event 431.

File Number 🕞	Code ~	Event Title	Work 7уре 🗠	Event D	Address ~	Loan Number 👒	Accepted
1785	431	Closing Itsbuctions	Clusing	09/11/2015 11:42:454	430 September Lave	125456	-

2. An email notification will be triggered to the contact in AIM+ for all new events from the lender.



Once the inbound email notification is received, log into AIM+ and open the file. Access the **Lender Connect Data Entry Group** and select the **431** event in the Work Queue and click **View** to open the event details screen. Download and save the PDF that is attached with the event from the lender then click **View**. Next, click **Update** to start the compare and update process on the event.

3. The compare screen will render displaying the current AIM+ Closing Disclosure values against the respective lender values. Select the Lender Fee Name and Amounts to import into the AIM+ file.

A - Origination Charges				A - Organization Charges	G - Initial Escrow Payment at Closing					
Freehate	Sorrover 44 Corong	Rommer Betole Coung	34	A - Grigeraturi Charges	in the second		I American			
AMVER	SAMOVER	ARCINE.	ANS	E - Services Borrower Dis Net Shop	Bunkelype	Aug to	Bytan AChing	Bottom Marcoll.	Search Lines	Serie Ballier
Approximent as	- Lander Value	Lander Value	Carries	Par -	derived	white brank and a second second	AND YORK	Abread	and rates	Add United
Approcations' ee	15.05	and all	56.00	C - Services Berrover Die Shee Far	Lander Olar	Laborar Yorker	Landar Volum	Laborate	Letter title	Lorder Table
and the second	and the second s		1000	F . Toron and Other Department Taxa	March /	Trace P	PROF. P	and P	HORE F	ages 7
Approxifes	8.0100		128.44		Abirtha	ARE VIEW IN A REAL	Altrophe	PWYMA	ANETON	101100.0
Lever Your	Londer Value	Linder Value	Lorus	P-Propage	Lancester Design.	Letter vol.m.	Lange your	Lance open	Leventure	Lavariant
WEET, C	lepot r	Inpot: IT	PRICE	1. M001 L	agent of	Input. T	and P	and the	Pagest C	angest (*

To import all Lender Values, click Select All.

4	THE OWN BAL	i.	
Header		Feather	
Harm	Antine	Langer your	-
(tale towel) .	900000	within the	
Cloving Cate	110kmrs	11080015	
Databarrent Saw	1538-2215	1109-0013	
famorant Agent	Tasteg Ages:	Terring Agent	
File Number	1828	100	
Plants	CODD Cuprels Creek Stuff Copress, 19, 77420	12121 Commo Cress Red Common, FX 11223	

Importing Fee Data

Certain fees may not be available for import because the fee types are not yet supported in AIM+. These fees will be displayed on the compare screen but will not have a checkbox available to select for import. By printing the lenders Closing Disclosure PDF and reviewing the imported data in the AIM+ **Closing Data Entry Group** you will be able to verify any missing data. Those fees that did not import will need to be inputted manually.\

NOTE: Pre-printed lines on the Closing Disclosure that contain the percentage, number of months, and amounts will not currently show on the compare screen. You must look at the PDF for the detail to enter on the Closing Disclosure

Steps

1. After importing, access the **Closing Data Entry Group** within the AIM+ file and enter all of the remaining fee data to complete the Closing Disclosure. Click **Preview** and verify the changes.

NOTE: Preview of the Closing Disclosure will display a combination of data that has been entered into AIM and data that the lender has provided that is not editable by design.

2. From Lender Connect initiate delivery of the draft closing statement to the lender by using event 406. It is *important* to preview the Closing Disclosure after changes are made to ensure the lender will receive the most current data you entered. Automatically when the event is submitted the Closing Disclosure draft is delivered to the lender and converted to an XML format.



Home	CI - Send Initial Closing Statement Draft (406)
Scarch By Pile Runder.	Pile Namber, 1075 Transeties (b) 15/17935-10010953 Campany: Anrish Tent Address: 11 Nam Street Bry State Zip: Noution DX Lease Namber Transition 11 Namber Street Street
Wark Type:	Gate Created: \$5000015
Classing-3 •	
Wark-Addone:	Compare and Update

e l
T.xml

Launch Closing Insight Portal – Submit Closing Statement Draft and Analytics to Lender Modified Closing Instruction Fee Comparison and Update

Steps

1. After submitting event 406, log into the Closing Insight Portal by launching in Lender Connect.



2. Click **Analyze** and review the **Flags** and **Findings** and address any as needed.



NOTE: User must return to AIM+ **Closing Data Entry Group** to update fees, preview the Closing Disclosure and re-submit the 406 before returning to the portal to complete the collaboration.

3. When satisfied then click Submit to Lender.

Modified Closing Instruction Fee Comparison and Update

Steps

1. Receive modified closing instructions with fee data from the lender via event 432.

		Contrag Contractory Mandragence Temperature	Chinese	Barranta Piarria	100,000-044	
Pie Mutter	coat +	Keed Sile +	NUM TOP	turet ()	Line Martine	Accepted
Vev Once	In the Party	Reput.			11 Time ()	and show 2
No.9. Gaese						

- 2. Perform Compare and Update function (refer to section II steps 3 4).
- 3. Preview Closing Disclosure (refer to section II steps 3 4).



4. From Lender Connect initiate delivery of the draft closing statement to the lender by using event 433. It is <u>important</u> to preview the Closing Disclosure after changes are made to ensure the lender will receive the most current data you entered. Automatically when the event is submitted the Closing Disclosure draft is delivered to the lender and converted to an XML format.

	Document	
CI - Send Modified Closing Statement Draft (433)	Description	DocDate
File Number: 1678 Transactien ID: 15477608-10615953 Gempany: AM GA Test Address: 11 Main Street City State Zip: Houston TX: Lean Number: Simulatives, jucchstorston Date Created: IKG42015	DocStatus	FileName CLSTMT.xml

Launch Closing Insight Portal – Submit Closing Statement Draft and Analytics to Lender

Steps

- 1. After submitting event 433, log into the Closing Insight Portal by launching in Lender Connect and enter the credentials provided by RealEC. Once launched, you will be in the context of the file.
- 2. Click Analyze and review the Flags and Findings and address any as needed.



NOTE: User must return to AIM+ Closing Data Entry Group to update fees, preview the Closing Disclosure and resubmit the 406 before returning to the portal to complete the collaboration.

4. When satisfied then click **Submit to Lender**.



Final Approved Closing Statement from Lender

Events included are Inbound 434 and 435 - Closing Product.

Steps

- 1. Receive lender's closing statement approval via event 434.
- 2. Receive final closing statement with fee data from lender via event 435.

Mew Close Work Event Reset							
Fåe Number -	Code -	Event Title -	Work Туре 🗠	Event D	Loan Number -	Accepted	
1802	454	Closing Statement Approved by Lender	Closing	09/16/2015 2:18 PM	0916	Yes	
1802	455	Closing Statement Delivered by Provider x2	Closing	09/16/2015 2.10 PM	0916	Yes	

NOTE: The lender may not include the final Closing Disclosure PDF in the 435 but instead include the copy in the closing package they provide.

- 3. Perform Compare and Update function (refer to section II steps 3 4).
- 4. If correct, Preview the Closing Disclosure and perform normal closing and post-closing functions.
- 5. If changes are required, make the necessary changes in the **Compare and Update** screen then enter the remaining fee data that was not imported and preview the Closing Disclosure.
- From Lender Connect initiate delivery of modified closing statement to the lender event 433 (refer to section IV step 6).

Launch Closing Insight Portal – Submit to Lender Request to Re-open

Steps

- 1. Launch Closing Insight within Lender Connect.
- 2. After submitting event 433, log into the Closing Insight Portal by launching in Lender Connect.
- 3. Analyze review Flags and Findings and finalize Submit to Lender.

NOTE: Verify with the lender if they will use Closing Insight for post-closing changes or if they plan to follow a manual process. This may vary by lender.

Lender Receives Request to Re-open and Decisions the file

Steps

1. If the lender re-opens the request, event 432 will be received with the modifications. Repeat steps IV and V.



2. If not, an event 439 re-open not accepted will be received and any fees or changes made must manually be reversed so the Closing Disclosure matches to the lender version.

View	Close	Nork Event	1	Reset			E View	Closed Work Ev	rents
File Numb	ber -	Code	÷	Event Title -	Work Type 🗠	Event D	Loan Number	- Accepted	
1706		439		Reopen Not Accepted (439)	Closing	09/11/2015 12:59 PM	987456	Yes	-

Convert Order to Closing Insight

Event included in this step is an inbound 438 - Title, Closing, and Doc Signing products.

Steps

- 1. From Lender Connect, receive Concert Order to Closing Insight event from the lender.
- 2. Click the **Switch to CI** button. This selection only updates transactions that flag to Closing Insight.
- 3. From AIM+, select the **Closing** Data Entry Group. You will see the HUD selected in the Settlement Statement View.
- 4. From the *Settlement Statement* drop-down, select **Closing Disclosure**. Any fields included on this Closing Disclosure that are not included on the HUD must be entered in manually.



NOTE: This event converts a Common Workflow file to the Closing Disclosure process.