

# Using Encompass with AIM+

User Guide

For Stewart Affiliates Only May 20, 2018



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# 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 <u>commonworkflow@stewart.com</u> 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.

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

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

# **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)

File Information			
File Number         Project Description           17-0634	n	Tracking Location Main Office/Sabiha/EnCompasS/	
Order Date * Need By Date	Closing Date	Order Type*	Agent Issued Policy
Transaction Category Transaction	n Type*	Associated File Number	Agene issued roney
○ Commercial	Loan Only/Refi - HELOC	▼ ×	
File Status	Status Date	Status Reason	
100 New 🕶 H			<b>▼</b> ×
Branch *	Master Project Descripti	20	
2 Branch 2			<b>-</b> ×
Country	State/Province	County	
US United States of America		• ×	<b>▼</b> ×
Escrow Unit		Escrow Officer	
	<b>▼</b> ×		<b>▼</b> ×
Bank Account		Business Development Officer	
	<b>▼</b> ×		<b>▼</b> ×
Title Unit		Title Officer	
	▼ ×		▼ ×
Underwriter		Agent*	
STGC Stewart Title Guaranty Company	▼ ×	060062 060062	▼ ×

## **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.

Proper	rty Informatio	n									
Proper	rty Description '	*Property T	ype *		Sale	es Price					
Propert	ty 1	UNK	Unknown		▼ ×	\$480,	00.00				
Area				Site/Store I	Number						
			▼ ×			Show					
Prope	rty Address 👘								 	 	_
N ·	◀ 1 of	1	нн 🎦	×							
Street	Number From		Street	Number To							
12364	4										
Direct	tion S	treet Name			Street Type	[	irection				
	▼× S	kycrest dr				▼ ×		• ×			
Unit T	уре		Unit N	umber							
			• ×								
City			Postal	Code							
Sugar	Land		77479		Unincorp	orated					
Count	ry			State/Pr	ovince						
US	United States	of America	- ×	ТХ	Texas		▼ ×				
Count	У			Town/T	ax Authority						

## **Parties**

If the AIM+ file was newly created upon the acceptance of the Encompass order, then the Borrower/Buyer and Co-Borrower/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*.



Lender information is not populated in Parties or File Notes.

Parties								inter in the second sec
14 4	3 of 3	н 🕆 🖬 × А :	5 at 20					
Select a Party		Monaghan, Robert						
Party Role	Name	<b>Party Information</b>						A
Underwriter	Stewart TL.	Role *						
Buyer/Borro	Torra, Mercy	BUYDOR Buyer/1	lonower	×× ₽ Send	to SureClose			
Buyer/Bono_	Monaghan	Customer Type	Code					
		*× Г	Business					
		Prefix First No	erre	Middle Name	Last Name	Suffix		
		Robert			Monaghan			
		Title				Social Security Number		
		Vesting Text						
						* ×		
							2	
							2	
		Address						
		410 Benedum Drive						-
		City	Posta	Code Country				
		Mddetown	77554			**		
		SateStructure						
				5 A				
		Communication T	уре		Det	8		Extension
			5.27		-			1
								Save & Exit Cancel ## 13
								1 10

# 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.

RealEC	Encompass								
N	lotes	Pending Notification	ns and Documen	ts					
Doc	uments	Work Action ~	Effective ~	Transact ~	Lender ~	Loan Nu ~	Property Add ~	Property ~	File Nu
Select File St Notification	tatus	Sales Contract Received	04/04/2018 6:15 AM	Purchase	Umer Ayaz	UmerNotesFi	9700 Bissonnet St, Houston, TX 77036	Harris	UmerNo
Sales Contra Attach Do	act Receive 🔹	Commitment Completed	04/04/2018 6:15 AM	Purchase	Umer Ayaz	UmerNotesFi	9700 Bissonnet St, Houston, TX 77036	Harris	UmerNo
Submit I	Notification	Curative Cleared	04/04/2018 6:15 AM	Purchase	Umer Ayaz	UmerNotesFi	9700 Bissonnet St, Houston, TX 77036	Harris	UmerNo
		Settlement Statement in Progress	04/04/2018 6:15 AM	Purchase	Umer Ayaz	UmerNotesFi	9700 Bissonnet St, Houston, TX 77036	Harris	UmerNo'
									•
								1-9	or 9 items
		Completed Notificat	ions and Docum	ents					
		Work Action ~	Completio v	Transact v	Lender ~	Loan Nu ~	Property Add ~	Property ~	File Nu
		Order Confirmed	04/04/2018 6:15 AM	Purchase	Umer Ayaz	UmerNotesFi	9700 Bissonnet St, Heusten, TX 77936	Harris	UmerNo

# **Viewing and Sending Notes**

## **Viewing Received Notes**

The former **Inbox** button on the *Lender Connect* File-level screen has been renamed to **Notes**. A new grid along with text fields have been added to the **Notes** screen of Lender Connect to send/view a Note or Message to an Encompass Lender.

The Notes screen has additional options for viewing and sending Notes back to the Lender. Follow the steps below to view a Note sent from a Lender.

### Steps

1. From the *Lender Connect screen*, under the **Accepted and Canceled Orders** grid, click the File Number you want to view Notes about. The following screen displays.

Notes (3)	Pending Notification	ns and Documen	ts					
Documents	Work Action	Effective	Transact	Lender ·	Loan Nu	Property Add	Property	File Ni
lect File Status tification	Sales Contract Received	03/30/2018 8:52 AM	Purchase	Umer Ayaz	Umer30620_1	9700 Bissonnet St. Houston, TX 77036	Harris	Umer:
iles Contract Receive • Attach Documents	Commitment Completed	03/30/2018 8.52 AM	Purchase	Umer Ayaz	Umer30620_1	9700 Bissonnet St, Houston, TX 77036	Harris	Umer
Submit Notification	Curative Cleared	03/30/2018 8:52 AM	Purchase	Umer Ayaz	Umer30620_1	9700 Bissonnet St, Houston, TX 77036	Harris	Umer:
	Settlement Statement in Progress	03/30/2018 8:52 AM	Purchase	Umer Ayaz	Umer30620_1	9700 Bissonnet St, Houston, TX 77036	Hams	Umer
		н					1 - 9 of	9 items
	Completed Notificat	ions and Docum	ients					
	Work Action ~	Completio ~	Transact •	Lender ~	Loan Nu	Property Add ~	Property ~	File N
	Order Confirmed	03/30/2018 8:52 AM	Purchase	Umer Ayaz	Umer30620_1	9700 Bissonnet St, Houston, TX 77036	Harris	Ume

2. Click the Notes button. The Notes screen displays.

		Notes				
Subject *						
Note *						
Outgoing Notes					Owar	Send
Subject	~ Notes		- To	- Date &	Time	6
123	454		Lender	02/27/2	ISB 4:57 PM	
Test 2	Test Note 2		Lander	02/26/21	118 \$:30 PM	
Testing from Encompass portal	Test from Encompass portal		Lender	02/26/21	118 \$ 28 PM	
Test mag from AIM+	The body of lext		Lender	02/26/21	118 S 07 PM	
Incoming Notes					Mark as 18	west 1
Incoming Notes	+   Notes	- From	· Requires Action	- Senices	Date & Time	wad .
Incoming Notes Subject Subject from Encompass	<ul> <li>Notes</li> <li>Message from Encompase.</li> </ul>		< Requires Action N/A	- Services Title	Mark at Us > Date 5. Time 02/27/2018 11:17 AM	vead V
Incoming Notes Subject Subject from Encompase	<ul> <li>Koms</li> <li>Message from Drosingess.</li> </ul>	<ul> <li>✓ Fran</li> <li>Lander</li> </ul>	<ul> <li>Requires Action</li> <li>NuA</li> </ul>	<ul> <li>Services</li> <li>Title</li> </ul>	Mark av (2) Date & Time 6027/2018 11 17 AM 1 - 1	t of 1 dem

3. From the Incoming Notes grid, click to view unread Note(s) from the Lender.

## Sending Notes from AIM+ to Encompass

The section below explains how to send documents from AIM+ to Encompass.

### Steps

1. From the *Lender Connect screen*, click the **Notes** button.

Notes	Pending Notification	is and Documen	ts						Γ
Documents	Work Action ~	Effective ~	Transao ~	Lender ~	Loan Nu ~	Property Add ~	Property ~	File Nu ~	
Select File Status Notification	Sales Contract Received	03/13/2018 4:07 AM	Purchase	Wells Fargo Bank	180301605	55/A Green Lane, Houston, TX 77085	Fort Bend	18-0899	
Attach Documents	Commitment Completed	03/13/2018 4:07 AM	Purchase	Wells Fargo Bank	180301605	55/A Green Lane, Houston, TX 77085	Fort Bend	18-0899	
Submit Notification	Settlement Statement in Progress	03/13/2018 4:07 AM	Purchase	Wells Fargo Bank	180301605	55/A Green Lane, Houston, TX 77085	Fort Bend	18-0899	
	Settlement Statement Completed	03/13/2018 4:07 AM	Purchase	Wells Fargo Bank	180301605	55/A Green Lane, Houston, TX 77085	Fort Bend	18-0899	
		H						1 - 7 of 7 items	
	Completed Notificat	ions and Docum	ents						
	Work Action ~	Completio ~	Transac ~	Lender ~	Loan Nu ~	Property Add ~	Property ~	File Nu Y	
	Final Policy	03/13/2018 7:56 AM	Purchase	Wells Fargo Bank	180301605	55/A Green Lane, Houston, TX 77085	Fort Bend	18-0899	
	Curative Cleared	03/13/2018 4:39 AM	Purchase	Wells Fargo Bank	180301605	55/A Green Lane, Houston, TX 77085	Fort Bend	18-0899	

The *Notes* screen displays a template for sending Notes, an *Outgoing Notes* grid, as well as an *Incoming Notes* grid. Notes already sent to Encompass display in the Outgoing Notes grid, while notes received display in the Incoming Notes grid.

2. Enter the Subject and Note content.

		Notes				
Subject '						
Note *						
Outpoing Notes					Cear	Sent
Subject	- Notes		~ To	I Dete	& Time	
123	456		Lender	02/27	/2018 4 57 PM	1
Test 2	Test Note 2		Lender	02/20	2018 5:30 PM	
Testing from Encompass portal	Test trues Encompass portal		Lender	62/2N	52018 S:28 PM	
Test map from AM+	The body of fext		Lender	62/26	12818 5 07 PM	
Note Details					1. Mark as 5	4 of 4 terms
Subject	- Notes	- From -	Requires Action	- Services	<ul> <li>Date &amp; Time</li> </ul>	
Subject from Encompass	Message from Encompans.	Lander	3403,	Title	62/27/2018 11 17 AM	
					1.	1 of 1 items
						Back

3. Click Send.



The **Subject** and **Note** are required fields. The Subject and the Note display in AIM+ on the *Lender Connect/TEFS Encompass* screen in Outgoing Notes grid.

# **Viewing and Sending Documents**

Using AIM+, you can send notifications to lenders with one or more documents attached. You can also check the status of files from the File-level, as well as view documents sent from Lenders.

## **Viewing Received Documents**

The former **Send Documents** button on the *Lender Connect* File-Level screen has been renamed to **Documents**. A new grid has been added to the **Documents** screen of *Lender Connect*. This new grid allows you to view and download documents sent by Encompass Lenders.

The **Documents** button displays on the File-level screen. Use the steps below to view documents sent from Lenders.

### Steps

1. From the *Lender Connect screen*, under the **Accepted and Canceled Orders** grid, click the File Number you want to view documents about. The following screen displays.

Notes (3)	Pending Notification	ns and Documen	ts					
Documents	Work Action ~	Effective	Transact	Lender ~	Loan Nu	Property Add	Property	File N
lect File Status tification	Sales Contract Received	03/30/2018 8:52 AM	Purchase	Umer Ayaz	Umer30620_1	9700 Bissonnet St, Houston, TX 77036	Harris	Umer:
Attach Documents	Commitment Completed	03/30/2018 8.52 AM	Purchase	Umer Ayaz	Umer30620_1	9700 Bissonnet St, Houston, TX 77036	Harris	Umer:
Submit Notification	Curative Cleared	03/30/2018 8:52 AM	Purchase	Umer Ayaz	Umer30620_1	9700 Bissonnet St, Houston, TX 77036	Harris	Umer:
	Settlement Statement in Progress	03/30/2018 8:52 AM	Purchase	Umer Ayaz	Umer30620_1	9700 Bissonnet St, Houston, TX 77036	Hams	Umer
	4	N	20	X	5. C	7.		
		•					1 - 9 af	9 items
	Completed Notificat	ions and Docum	ents					
	Work Action ~	Completio ~	Transact ~	Lender ~	Loan Nu	Property Add ~	Property ~	File N
	Order Confirmed	03/30/2018 8:52 AM	Purchase	Umer Ayaz	Umer30620_1	9700 Bissonnet St, Houston, TX 77036	Harris	Umer

2. Click the **Documents** button. The *Documents* screen displays.

Document Name De	scription				
ALTA Settlement Statement / Fee •		Upload Local Document	Get Doc from SureCl	iose .	
lote: Attached document will not be submitte locument Work History	d if document size exceeds 30MBs.				
Document	- Description -	File Name	- Work Action	- Sent Date	~
Final Policy	test	105 MB.pdf		03/13/2018 4:51 AM	
ALTA Settlement Statement / Fee Sheet		51 MB.pdf		03/13/2018 4:50 AM	
ALTA Settlement Statement / Fee Sheet	Any written or pictorial information describing defining, specifying reporting, or certifying activities requirements procedures or results. Documenta	293 MB.pdf		03/13/2018 4:38 AM	
				Submit and Close Submit and Send Next D	Doc Close
Received Documents				Submit and Close Submit and Send Next (	Joc Clos
Received Documents	· Description		✓ File Name	Submit and Close Submit and Send Next D	Joc Clas
Received Documents ocument Received History Document Loum Modification Agreement	<ul> <li>Description</li> <li>Laan Modification Agreement- 19 4MB</li> </ul>		<ul> <li>File Name</li> <li>Keightley, 1963 p.df</li> </ul>	Submit and Close Submit and Send Next D Received Date 03/09/2019 9:50 AM	Xoc Close
Received Documents ocument Reveived History Document Landkoffication Agreement Landkos Continuation Of Punds	Description     Loan Modification Agreement- 19 4MB     19 4MB		<ul> <li>File Name</li> <li>Keightley, 1963 pdf</li> <li>Keightley, 1963 pdf</li> </ul>	Submit and Close Submit and Sand Next D Received Date 03/09/2010 9:50 AM 03/09/2010 9:21 AM	Xoc Close
Received Documents ocument Reserved History Document Loan Modification Agreement Lenders Contimution Of Funds	<ul> <li>Description</li> <li>Loan Modification Agreement: 19.4MB</li> <li>19.4MB</li> <li>Lenders Confirmation Of Funds</li> </ul>		<ul> <li>File Name</li> <li>Keightley_1963.pdf</li> <li>Keightley_1963.pdf</li> <li>CLSTMT.vml</li> </ul>	Received Date         03/09/2016 9 50 AM           03/09/2016 9 51 AM         03/09/2016 9 21 AM	Joc Clos
Received Documents ocument Received History Document Lander Sonthmation Of Funds Landers Contimution Of Funds Death Certificate	<ul> <li>Description</li> <li>Loan Modification Agreement- 19 4MB</li> <li>19 4MB</li> <li>Lenders Confirmation Of Funds</li> <li>Death Certificate</li> </ul>		<ul> <li>File Name</li> <li>Keightley_1963.pdf</li> <li>Keightley_1963.pdf</li> <li>CLSTMT.aml</li> <li>CLSTMT.aml</li> </ul>	Submit and Close         Submit and Send Next II           Received Date         03/09/2016/9/56 AM           03/09/2016/9/216/9/216 AM         03/09/2016/9/216 AM           03/09/2016/9/216/9/216/9/216/9/216 AM         03/09/2016/9/216/9/216 AM	Clos
Received Documents ocument Received History Document Loan Modification Agreement Lenders Confirmation Of Funds Lenders Confirmation Of Funds Borrower Authorization	Description     Loan Modification Agreement- 19.4MB     19.4MB     Lenders Confirmation Of Funds     Death Certificate     Borrover Authorization		File Name     Keightley_1963.pdf     Keightley_1963.pdf     CLSTM1.aml     CCTT_5.TF     SamplePNCImage_1n	Received Date         Submit and Sand Next I           0309/2016 9 15 AM         0309/2016 9 21 AM           0309/2016 9 21 AM         0309/2016 7 49 AM           0309/2016 7 49 AM         0309/2016 7 49 AM	Doc Close
Received Documents bocument Received History Document Lana Modification Agreement Landers Contimution Of Funds Death Centificatio Death Centificatio Death Centification Romover Authorization Right Of Rescission Refinance	<ul> <li>Description</li> <li>Loan Modification Agreement- 19.4MB</li> <li>19.4MB</li> <li>Lenders Confirmation Of Funds</li> <li>Death Certificate</li> <li>Borrower Authorization</li> <li>Right Of Rescission Refinance</li> </ul>		<ul> <li>File Name</li> <li>Keightley, 1963.pdf</li> <li>Kisightley, 1963.pdf</li> <li>CLSTMT.sml</li> <li>CCITT_5.TIF</li> <li>SamplePNGImage_1n</li> <li>SamplePNGImage_3.26</li> </ul>	Solumit and Close         Solumit and Send Next I           Received Date         0.0992019 56 AM           0.0992019 59 AM         0.0992019 74 AM           0.0392019 74 AM         0.0392019 74 AM           0.0392019 74 AM         0.0392019 74 AM           0.0392019 74 AM         0.0392018 74 AM	Xoc Close

3. From the Received Documents grid, click to view read and unread documents from the Lender.

## **Sending Notifications with Documents**

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



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.

Lender Connect					A
5 fb					
Attach and Subr	nit Documents				
Document Name	Description				
Title Consistment		Uphand Local Docum	Get Doc tron SureClose		
Note: Attached document will n Document Work History	tot be submitted if document size exceeds 0	01/8s.			
Document	< Description	< Fie hane	~ Work Action	~ Sent Date	1.4
					-
					-
				PROTOTOTOTOTOTOTOTOTOTOTOTOTOTOTOTOTOTOT	
				Submit and Close Submit and Send N	close Close

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.

				Document	SureClos	9		
ote: Attached document	will not b	be submitt	ed if document size ex	ceeds 30MBs.				
Document Name		Descripti	on	File Name		Size	Туре	
Sales Contract				Report.pdf		0.10 MB	pdf	
ocument Work History								
Document	~ D(	escription	Lender Connect Aler	t			Sent Date	~
			The document "S Contract Receive	ales Contract" for work a d" has been submitted s	ction "Sales uccessfully.			

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.
- 2. Click Submit Notification button.
- 3. The *Attach and Submit Documents* screen displays. The document associated to the selected notification displays in the **Document Name** drop-down.

der Connect					<
Attach and Sub	mit Documents	Torona Lawa Document	Out the feas Surafines	7	
Note: Attached document will Document Work History Document	I not be submitted if document size exceeds 3	OMBs.	Work Action	✓ Sent Date	~
					×
				Submit and Close Submit and Send Next Doc	Close

- 4. Click the Upload Local Document button to add and attach a document.
- 5. Type in any description (if required) in the **Description** textbox.
- 6. Click the **Submit and Send Next Doc** button.

- 7. A Lender Connect Alert pop-up displays, confirming that the document and notification have been sent.
- 8. Click the **OK** button.

		Document	SureClose	
Note: Attached document v Document Name	will not be submitted if do Description	cument size exceeds 30MBs.	Size	Type
Sales Contract		Report pdf	0.10 MB	pdf
Document Work History				
Document	- Description Lende	r Connect Alert		v Sent Date v
		Contract Received" has been submitted succes	ssfully.	
		Contract Received" has been submitted succes	stuly	

- 9. Click OK button.
- 10. The document displays in the **Document Work History** grid.
- 11. The lender then receives all of the documents sent from AIM+.
- 12. 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.

Locumenta	Work Action ~	Effective	Transact ~	Landar v	Loope March 1997	Property And And	Planter and a	And in case of the local division of the loc
				render .	Logii Nu	Property Add	Property ~	File Nu
elect File Status otification	Sales Contract Received	04/04/2018 6.15 AM	Purchase	Umer Ayaz	UmerNotesFi	9700 Bissonnet St, Houston, TX 77036	Hamis	UmerNo
Sales Contract Receive *	Commitment Completed	04/04/2018 6:15 AM	Purchase	Umer Ayaz	UmerNotesFI	9700 Bissonnet St, Houston, TX 77036	Harris	UmerNo
Submit Notification	Curative Cleared	04/04/2018 6:15 AM	Purchase	Umer Ayaz	UmerNotesFi	9700 Bissonnet St. Houston, TX 77036	Hams	UmerNo
	Settlement Statement in Progress	04/04/2018 6.15 AM	Purchase	Umer Ayaz	UmerNotesFI	9700 Bissonnet St, Houston, TX 77036	Harris	UmerNo

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

	Notes	Pending Notification	is and Document	ts					
	Documents	Work Action ~	Effective ~	Transact ~	Lender ~	Loan Nu ~	Property Add ~	Property ~	File Nu
:	Select File Status	Sales Contract Received	04/04/2018 6:15 AM	Purchase	Umer Ayaz	UmerNotesFi	9700 Bissonnet St, Houston, TX 77036	Harris	UmerNo <sup>*</sup>
	Sales Contract Receive 🔻	Commitment Completed	04/04/2018 6:15 AM	Purchase	Umer Ayaz	UmerNotesFi	9700 Bissonnet St, Houston, TX 77036	Harris	UmerNo
	Submit Notification	Curative Cleared	04/04/2018 6:15 AM	Purchase	Umer Ayaz	UmerNotesFi	9700 Bissonnet St, Houston, TX 77036	Harris	UmerNo
		Settlement Statement in Progress	04/04/2018 6:15 AM	Purchase	Umer Ayaz	UmerNotesFi	9700 Bissonnet St, Houston, TX 77036	Harris	UmerNo'
		•							•
								1 - 9	of 9 items

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 **Document** button.

Pending Notification	is and Documen	ts					
Work Action ~	Effective ~	Transact ~	Lender ~	Loan Nu ~	Property Add ~	Property ~	File Nu
Sales Contract Received	04/04/2018 6:15 AM	Purchase	Umer Ayaz	UmerNotesFi	9700 Bissonnet St, Houston, TX 77036	Harris	UmerN
Commitment Completed	04/04/2018 6:15 AM	Purchase	Umer Ayaz	UmerNotesFi	9700 Bissonnet St. Houston, TX 77036	Hamis	UmerN
Curative Cleared	04/04/2018 6:15 AM	Purchase	Umer Ayaz	UmerNotesFi	9700 Bissonnet St, Houston, TX 77036	Harris	UmerN
Settlement Statement in Progress	04/04/2018 6:15 AM	Purchase	Umer Ayaz	UmerNotesFI	9700 Bissonnet St. Houston, TX 77036	Harris	UmerN
	Pending Notification Work Action ~ Sales Contract Received Commitment Completed Curative Cleared Settlement Statement in Progress	Pending Notifications and Documen Work Action Completed Adv 2018 6-15 Received Adv 2018 6-15 Adv 2018 6-15	Pending Notifications and Documents           Work Action         Effective          Transact            Sales Contract         04/04/2018 6.15         Purchase           Commitment Completed         04/04/2018 6.15         AM           Curative Cleared         AM         Purchase           Settlement Statement in Progress         04/04/2018 6.15         Purchase	Pending Notifications and Documents           Work Action         Effective         Transact         Lender           Sales Contract         04/04/2018 6-15         Purchase         Umer Ayaz           Commitment Completed         04/04/2018 6-15         Purchase         Umer Ayaz           Curative Cleared         AM         Purchase         Umer Ayaz           Settlement Statement in         04/04/2018 6-15         Purchase         Umer Ayaz	Pending Notifications and Documents           Work Action         Effective         Transact         Lender         Loan Nu         Connuct           Sales Contract         AU         04/04/2018 6.15         Purchase         Umer Ayaz         UmerNotesFL           Commitment Completed         04/04/2018 6.15         Purchase         Umer Ayaz         UmerNotesFL           Curative Cleared         AU         04/04/2018 6.15         Purchase         Umer Ayaz         UmerNotesFL           Settlement Statement in         04/04/2018 6.15         Purchase         Umer Ayaz         UmerNotesFL           Settlement Statement in         04/04/2018 6.15         Purchase         Umer Ayaz         UmerNotesFL	Pending Notifications and Documents           Work Action         Effective         Transact         Lender         Loan Nu         Property Add         Property Add	Pending Notifications and Documents           Work Action         Effective         Transact         Lender         Loan Nu         Property Add         Property         Property           Sales Contract         Ad/04/2018 6:15         Purchase         Umer Ayaz         UmerNotesFL         Houston, TX 77036         Harris           Commitment Completed         Ge/04/2018 6:15         Purchase         Umer Ayaz         UmerNotesFL         9700 Bissonnet St.         Harris           Curative Cleared         Adv         Purchase         Umer Ayaz         UmerNotesFL         9700 Bissonnet St.         Harris           Settlement Statement in         Gu/04/2018 6:15         Purchase         Umer Ayaz         UmerNotesFL         9700 Bissonnet St.         Harris           Settlement Statement in         Gu/04/2018 6:15         Purchase         Umer Ayaz         UmerNotesFL         9700 Bissonnet St.         Harris

- 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.

Attach and Sub	mit Documents				
Contrast Property in Lines.	(2)	April 1	being bestering		
NOR PRATES STATES	I NOT THE ALMONDING & COLUMN	ADA BACHAGE TOTATE			
Diverse Spec	Discription of	To here		34	1748
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Concernent Store manage					
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		Lander Context And			
		The Bournert "Chang Protection La Accessibility	fler" has been edimited		
		(PK)			
		and the second se			
				Indeed and Direct Publishing	And have been seen

- 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.

Work Action	Effective Date ~	Transaction *	Lender v	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 - 5 of 5 item
Completed Notificatio	ns and Documents	Transartino	Lender v	Loan Number	Dronartiv Addrases	Presents Co. v	File Number v	1 - 5 of 5 item
Completed Notificatio	ns and Documents Completion D	Transaction ~	Lender v Bank of America	Loan Number v	Property Address ~ Highland road 76 apartment, Birmingham, AL 35214	Property Co	File Number ~	1 - 5 of 5 item Branch - Main Office
	ns and Documents Completion D	Transaction ~ Refinance Refinance	Lender v Bank of America	Loan Number	Property Address Highland road 76 apartment, Birmingham, AL 35214 Highland road 76 apartment, Birmingham, AL 35214	Property Co	File Number ~ existing01 existing01	1 - 5 of 5 item Branch · · · · · · · · · · · · · · · · · · ·

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.

Data Entry Groups 4	Exemple : order Order E B Te Information		
Classing Contents Connect Con	Services Pour Policy Addroad Detructions Unique Transaction Methodary		ء بر بر بر بر
<ul> <li>Showa Scotte</li> </ul>		Abite (pender cannet Alert)         XI           Rety ant/p Property Edemation from the Lorder has been added to The Totals.         Pender cannet includence and plot Documents for the file:	

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.

🕄 File Tracking 🔍 Setup 脑	eRecording 😰 eRecording 🖙 File Number: Existing01
Data Entry Groups	Existing01 : Order Order
Properties	
Title Charges	File Information
Lender Connect	Services
Closing	Prior Policy
Disbursements	Additional Instructions
Credit Distribution	Unique Transaction Identifier
Split Calculations	

## **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:

RealEC Encompass										
	The lender has cance	eled the electron	ic order.							
Notes	Pending Notification	ns and Documen	ts							
Documents	Work Action ~	Effective	Transact ~	Lender ~	Loan Nu	Property Add	Property ~	File Nu.		
Select File Status Notification	Sales Contract Received	04/04/2018 6:15 AM	Purchase	Umer Ayaz	UmerNotesFi	9700 Bissonnet St. Houston, TX 77036	Harris	UmerNo		
Sales Contract Receive  Attach Documents	Commitment Completed	04/04/2018 6:15 AM	Purchase	Umer Ayaz	UmerNotesFi	9700 Bissonnet St, Houston, TX 77036	Harris	UmerNo		
Submit Notification	Curative Cleared	04/04/2018 6.15 AM	Purchase	Umer Ayaz	UmerNotesFi	9700 Bissonnet St. Houston, TX 77036	Hams	UmerNo		
	Settlement Statement in Progress	04/04/2018 6:15 AM	Purchase	Umer Ayaz	UmerNatesFi	9700 Bissonnet St, Houston, TX 77036	Harris	UmerNo		
	Completed Notificat	(Register of 9 Rems) 1 - 9 of 9 Rems								
	Work Action ~	Completio ~	Transact ~	Lender ~	Loan Nu ~	Property Add	Property v	File Nu.		
	Order Confirmed	04/04/2018 6.15 AM	Purchase	Umer Ayaz	UmerNotesFi	9700 Bissonnet St, Houston, TX 77036	Harris	UmerNo		

#### Notes Screen:

Notes		
The lender has canceled the electronic order.		
Notes	~	From ~

#### **Documents Screen:**

der Connect				
0				
Attach and Submit Doc	uments			
The lender has canceled the electroni	c order.			
Document Name Des	cription			
ALTA Settlement Statement / F +			Upload Local Document	Get Doc from SureClose
Note: Attached document will not be submit	tted if document size exceeds 30	MBs.		
bootanient from matory				

# **Remove Pending Status**

**30 days** after a **Final Policy** status has been sent to a Lender, any pending statuses relating to that order are removed from the *Lender Connect/Encompass* screen. This rule relates to both Company-level and File-level users.

Once a Final Policy status has been sent to a Lender, the *Pending Status* pop-up displays, documenting the date the Final Policy status was sent, and a courtesy note letting you know that you have 30 days from the date of the Final Loan Policy to complete remaining Pending Lender Notifications and Documents.

ļ	IM+ (Lender Connect Alert)	X			
	Final Policy on the order has already been issued on 10/31/2017.				
	You have 30 days from the date of Final Loan Policy delivery to complete the remaining Pending Lender Notifications and Documents.				
	Pending Lender Notifications and/or Documents for this file:				
	1) Settlement Statement Completed 2) Closing Completed 3) Loan Funded				
	Navigate to Lender Connect to send notifications and/or documents when ready as required by the lender.				
	OK				

If you attempt to send any Status or Document from the *Lender Connect File-level* screen, after 30 days have passed with a Final Policy Status, the attempted status or document will not send. A pop-up displays, letting you know that the Final Policy status has already been issued.

Send Document(s)	Pending Notifications and Documents							
Select File Status Notification	Work Action ~	Effective D	Zransacti V	Lender v	Loan Nu 🗸	Property Addr		
Sales Contract F 💌								
Attach Documents		Lender Connect Alert						
Submit Notification		No sta Policy	tuses can be sent has been already	as "Final / issued.				
			ОК					
	•					Þ		
		н				No items to display		

Note

The Pending Status pop-up does not display upon opening files of cancelled orders.

# **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 <u>AIM+ Training Center</u> page.

## **Technical Support**

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