AIM+®

Release Notes

January 23, 2015

propertyinfo® | Global real estate technology

 PIC-1123-120-23

Table of Contents

AIM+ 5.3 Release Notes

AIM+ 5.3 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: January 23, 2015

New in This Release

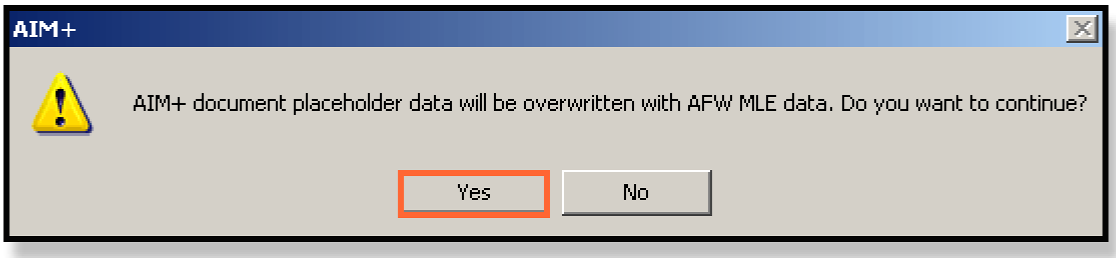
An overview of new features and modifications to AIM+ 5.3 include:

- A new warning message has been added when importing **AFW multiline element data**. Refer to AFW MLE Data Warning Message for more information.
- A **default underwriter payee option** has been added to HUD 1, HUD 1A and Closing (CSV) templates. Refer to Default Underwriter Payee Option for more information.
- Two new fields, **NMLS ID** and **ST License ID**, have been added to **Party Setup** and **Add/Edit Party Contacts**. Refer to Party Setup for more information.
- Additional items now print on the generated order sheet, including **vesting text**, **Mortgagee Clause**, **NMLS ID** and **ST License ID**, for specific roles. Refer to Additional Fields Print on Generated Order Sheet for more information.
- Two new fields, **NMLS ID** and ST **License ID**, have been added to **Parties** for a specific list of roles. Refer to Two New Fields in Parties for more information.
- Upon selecting *Retrieve* on the **Policies** screen, AIM+ applies the **HOI default setting** from *Custom Layout*. Refer to Policies for more information.
- A new option, **Add to Dictionary**, has been added to Documents as an additional tool for document review. Refer to Add to Dictionary for more information.
- A new **Zoom** slider has been added to **Documents** to increase the document appearance on the screen while formatting. Refer to Document Zoom for more information.
- A new checkbox, **Remove Shading**, has been added to **Closing** when generating a document. Select this checkbox to eliminate shading for easier view on all printed *HUDs*, *Closing Statements* and *Master Project files*. Refer to Remove Shading for more information.
- Enhancements have been made to **POCL's** in **Closing**. Refer to POCL and Suppress Buyer Amounts for more information.
- For added convenience, a new option has been added to list commonly used endorsements at the top of the **Endorsements** drop-down list in **Closing** and **Policies**. This feature requires setup. Refer to Commonly Used Endorsements for more information.
- Two enhancements have been made to the **1099-S** screen. Refer to 1099-S for more information.
- A new column, **Posting Date/Deposit Date**, has been added to the **Quick Reconciliation** screen. Refer to Escrow Accounting for more information.
- A new button, **Unlock**, has been added to **Master Projects**. Click this button to unlock a master project file locked by another user. Permission is required to use the **Unlock** button. Refer to Unlock Master Project Files for more information.

AIM for Windows

AFW MLE Data Warning Message

A warning message now displays when importing multiline element (MLE) data from AIM for Windows to an existing AIM+ file. The warning message notifies users when placeholder data will be overwritten with the MLE data. Click **Yes** to continue.



Setup

Closing Setup

Default Underwriter Payee Option

A default underwriter payee option on the Title Insurance screen has been added to the HUD 1, HUD 1A and Closing (CSV) templates. In Closing Setup, select the **Settlement Agent** and **Underwriter** party names you would like to default as the party roles in the payee option on line 1108 of the Title Insurance screen.

Party Setup

Two New Fields in Party Setup

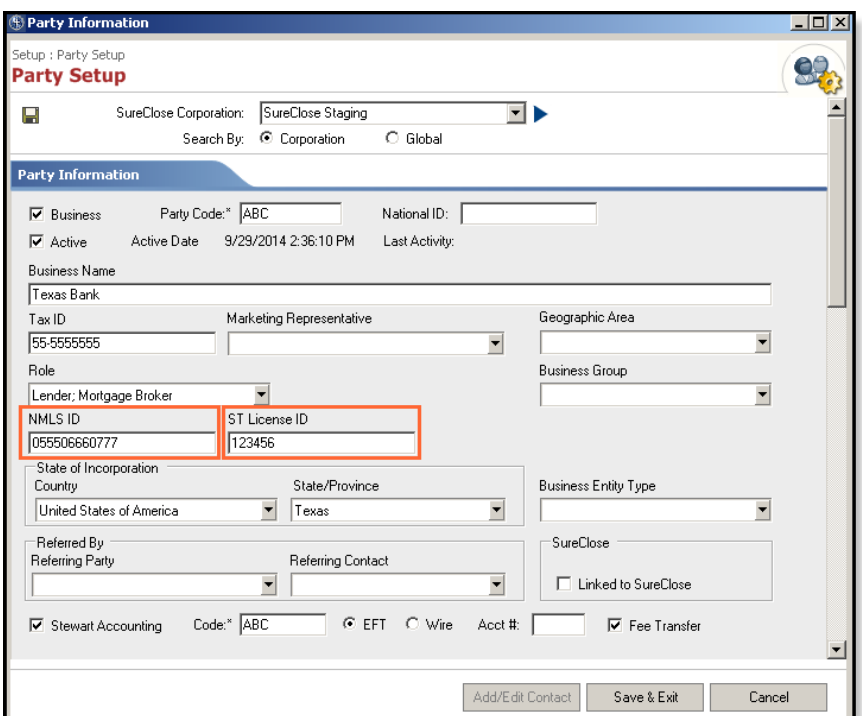
Two new fields, **NMLS ID** and **ST License ID**, have been added to Party Setup, and Add/Edit Party Contacts.

The **NMLS ID** (Nationwide Mortgage Licensing System & Registry) and the **ST License ID** (State License ID) are new fields that display on the new **Closing Disclosure** form. If the **NMLS ID** and/or the **ST License ID** are entered in Party Setup for the Party or the Party Contact, these two ID's will flow to the party on the file when the party and party contact are pulled from Party Setup.

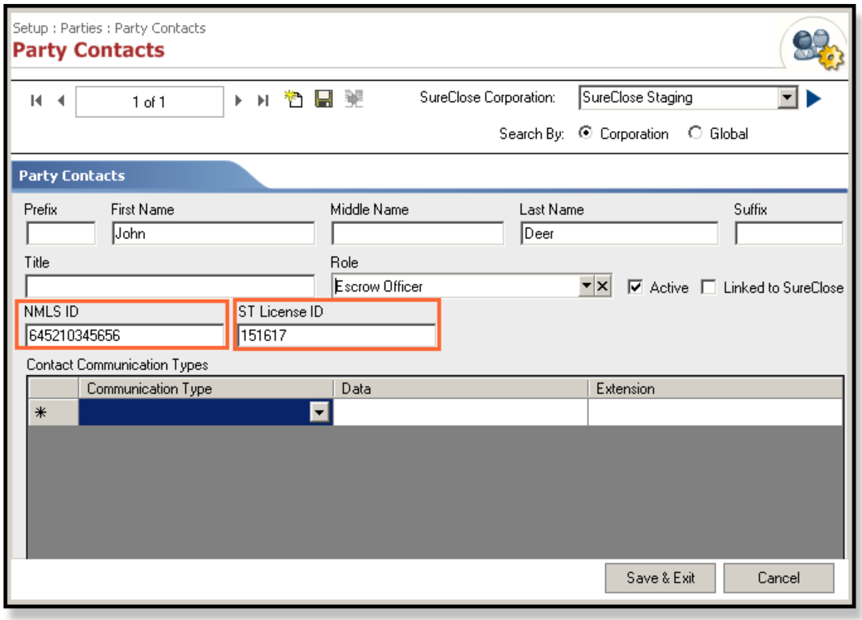
CFPB Note: If an organization or primary contact has both an **NMLS ID** and another form of license, both may be disclosed.

Enter the **NMLS ID** and **ST License ID** on the Party Information screen in Party Setup to flow to the party in Order Entry – Parties.

When parties with NMLS and ST License ID's are pulling into Parties, these fields flow to the *Party/Contact Information* screen. These fields must be entered in the Party on the Order to ultimately appear on the *Contact Information* tab on the Closing Disclosure (CFPB) for the Party.



The same two new fields are available for entry in *Party Contacts* from **Party Setup**.



Note

Users can also add the **NMLS ID** and the **ST License ID** on the Party screen.

Order

Additional Fields Print on Generated Order Sheet

Generated Order sheet will now print vesting text and Mortgagee Clause. **NMLS ID** and **ST License ID** for the Parties and Contacts also print on the Generated Order sheet with the following roles:

- Lender
- Mortgage Broker
- Listing Agent
- Selling Agent
- Listing Broker
- Selling Broker
- Settlement Agent

Parties

Two New Fields in Parties

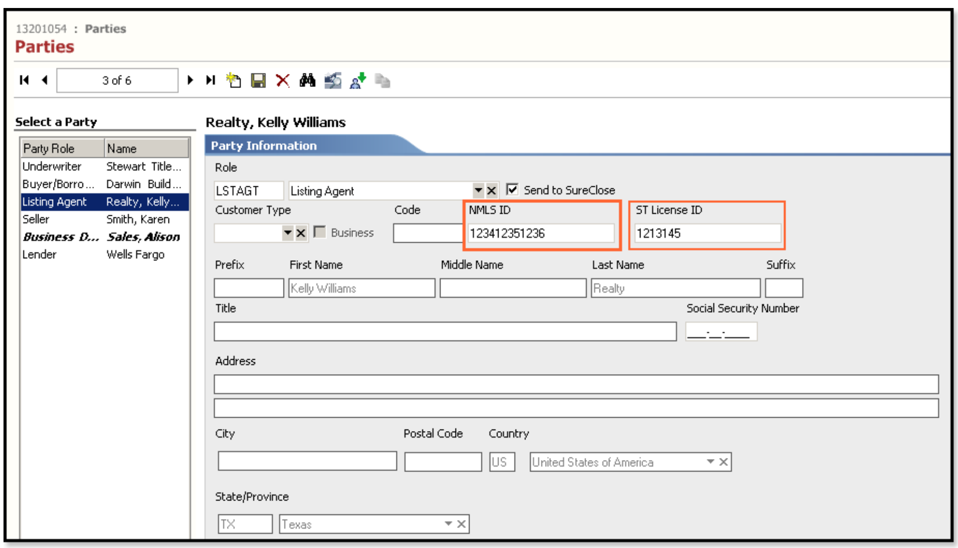
Two new fields, **NMLS ID** (Nationwide Mortgage Licensing System & Registry ID) and **ST License ID** (State License ID) have been added to Parties for the following roles:

- Lender
- Mortgage Broker
- Selling Agent
- Selling Broker
- Listing Agent
- Listing Broker
- Settlement Agent

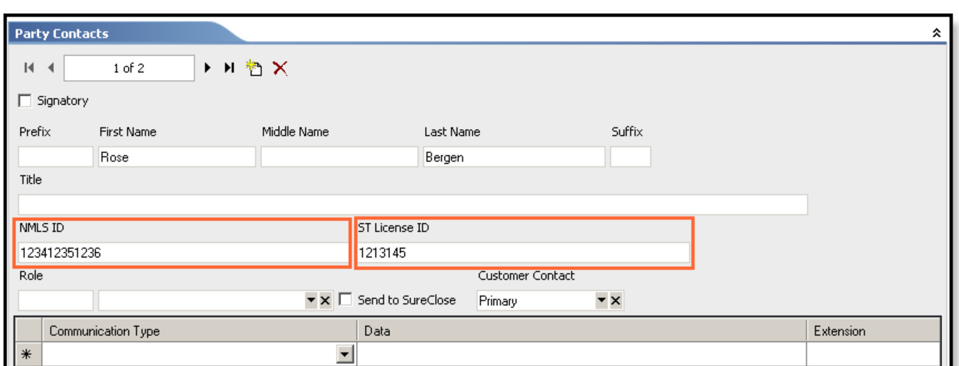
Enter the **NMLS ID** and **ST License ID** on the *Party Information* tab, and the *Party Contacts* tab in Parties. If these ID's have been entered in Party Setup, they will flow to the Party and the Party Contact on the order.

As a result, the **NMLS ID** and **ST License ID** are both visible on the **Contact Information** table on Page 5 on the new **Closing Disclosure** form for the party.

Party Information Tab



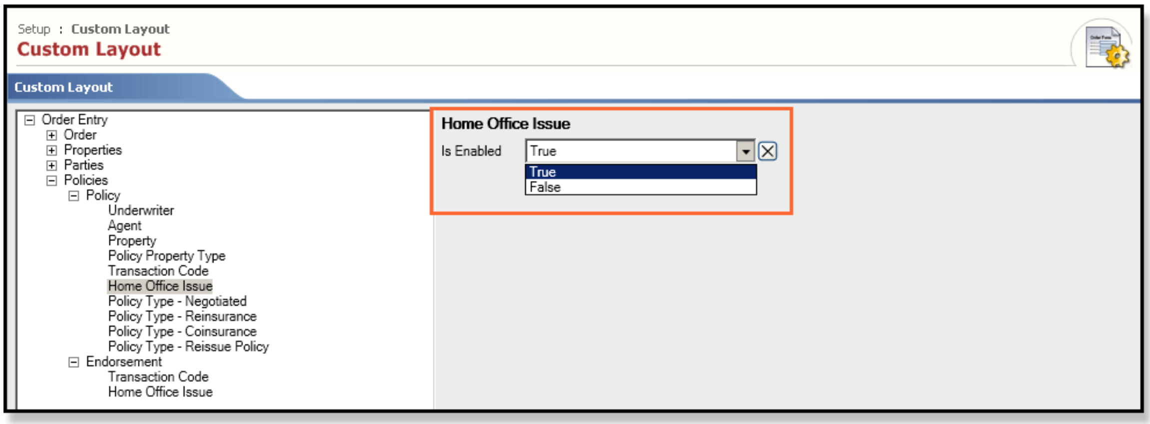
Party Contacts Tab



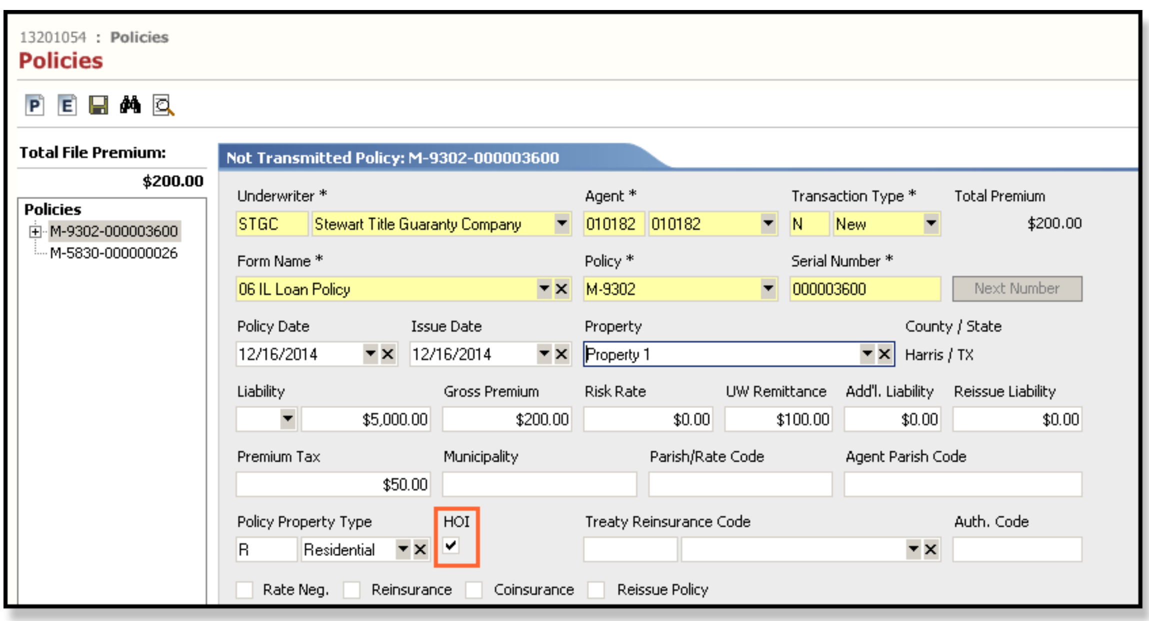
Policies

Honor HOI Setting from Custom Layout

When the ***Retrieve*** option is used on the *Policies* screen to bring policy information from the *Title Insurance* screen, AIM+ applies the **HOI** default setting from Custom Layout.



If this is set to **True**, the checkbox should always be populated as a default on the **Policies** screen.



Note

You have the option to uncheck the **HOI** checkbox on the **Policies** screen.

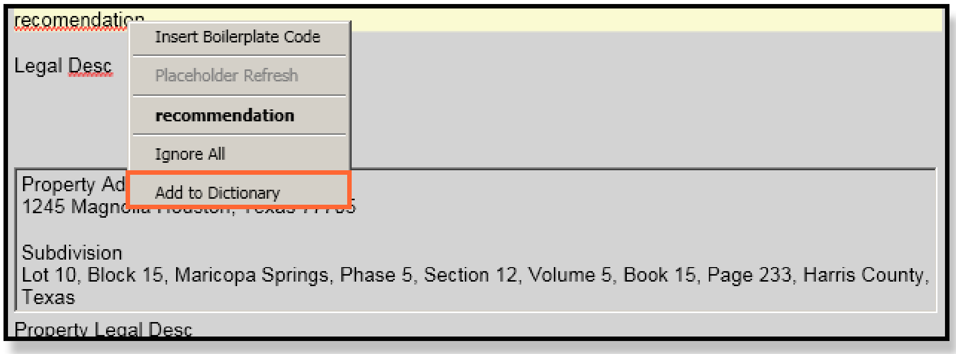
Documents

Add to Dictionary

A new option, **Add to Dictionary**, is available in Document Formatting and the Document Editor.

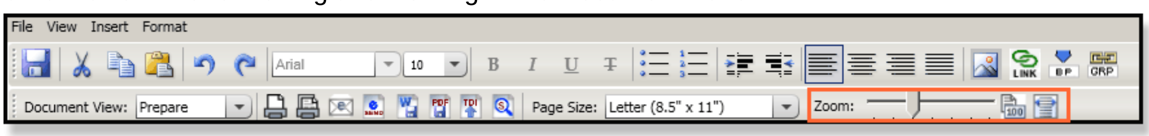
When a word is spelled correctly but is not recognized by the Document dictionary, right-click the word, and select **Add to Dictionary**.

By selecting this option, the word is no longer flagged as spelled incorrectly or unidentified.



Document Zoom

A **Zoom** slider has been added to the *Document Formatting* and *Document Editor* screens. Use the **Zoom** dial to increase the document size while formatting and working in the Document Editor.

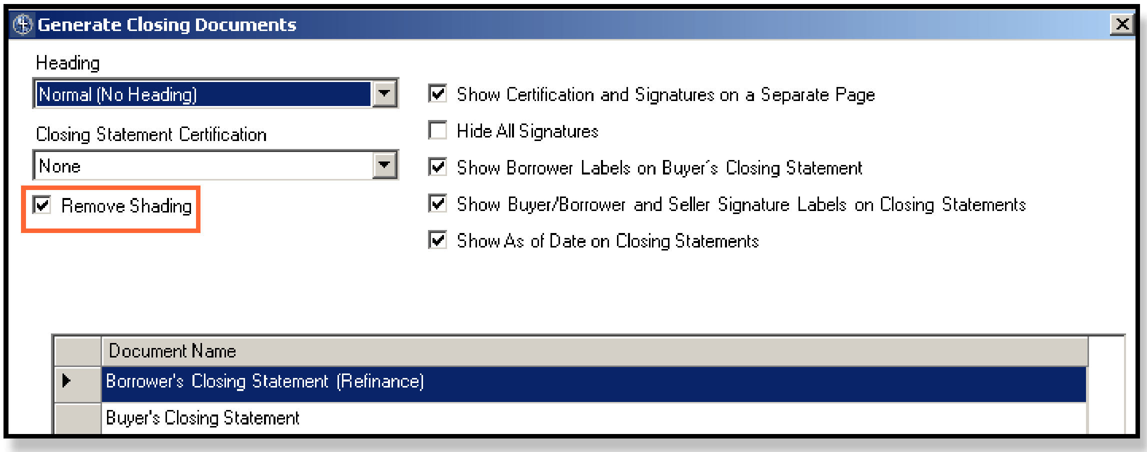


Simply adjust the dial with your mouse to enlarge the screen. To quickly return to 100% magnification, click the **100** icon.

Closing

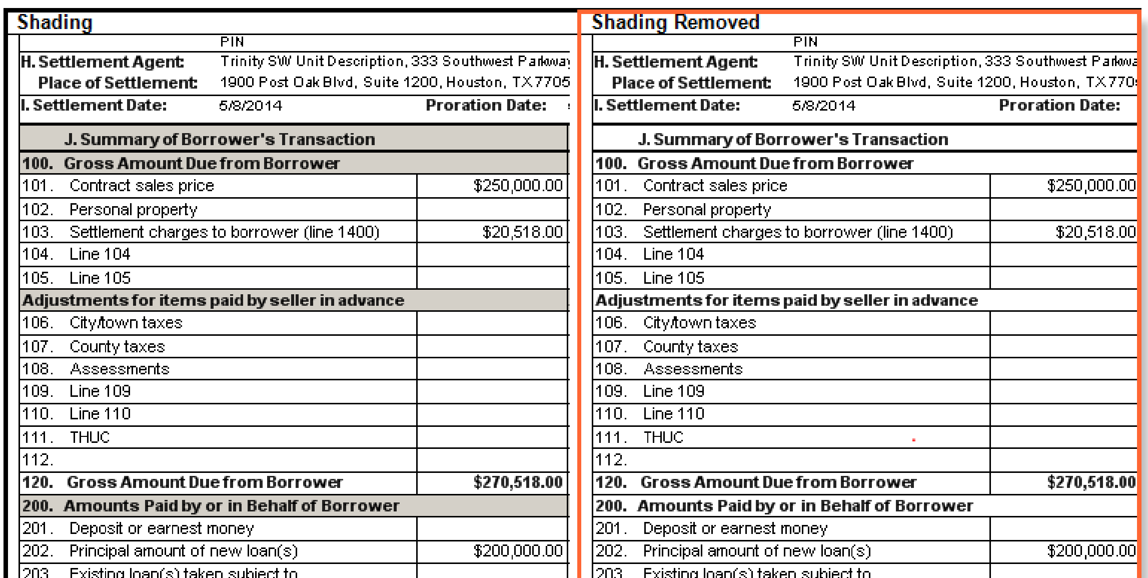
Remove Shading

A new option, **Remove Shading**, has been added to **Closing**. Select the **Remove Shading** checkbox to remove the shading on printouts for all HUDs and Closing Statements, including Master Project files.



Steps

1. From *Closing*, select any settlement statement.
2. Click the **Print** icon. The *Generate Closing Documents* pop-up displays.
3. The **Remove Shading** checkbox is selected by default. Be sure this checkbox is selected.
4. Click the document you want to print. Click on any document from the list of documents that you would like to print.
5. Select to Preview, Print or Email the document. Shading no longer displays.



Shading

PIN

H. Settlement Agent:	Trinity SW Unit Description, 333 Southwest Parkway	
Place of Settlement:	1900 Post Oak Blvd, Suite 1200, Houston, TX 7705	
I. Settlement Date:	5/8/2014	**Proration Date:**

J. Summary of Borrower's Transaction	
100. Gross Amount Due from Borrower	
101. Contract sales price	$250,000.00
102. Personal property	
103. Settlement charges to borrower (line 1400)	$20,518.00
104. Line 104	
105. Line 105	
Adjustments for items paid by seller in advance	
106. City/town taxes	
107. County taxes	
108. Assessments	
109. Line 109	
110. Line 110	
111. THUC	
112.	
120. Gross Amount Due from Borrower	**$270,518.00**
200. Amounts Paid by or in Behalf of Borrower	
201. Deposit or earnest money	
202. Principal amount of new loan(s)	$200,000.00
203. Existing loan(s) taken subject to	

Shading Removed

PIN

H. Settlement Agent:	Trinity SW Unit Description, 333 Southwest Parkwa	
Place of Settlement:	1900 Post Oak Blvd, Suite 1200, Houston, TX 770	
I. Settlement Date:	5/8/2014	**Proration Date:**

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109. Line 109	
110. Line 110	
111. THUC	
112.	
120. Gross Amount Due from Borrower	**$270,518.00**
200. Amounts Paid by or in Behalf of Borrower	
201. Deposit or earnest money	
202. Principal amount of new loan(s)	$200,000.00
203. Existing loan(s) taken subject to	

POCL and Suppress Buyer Amounts

POCL Does Not Display on Seller's Closing Statement

In Closing, the POCL (paid outside of Closing by Lender amount) no longer displays when previewing or printing the Seller's Closing Statement.

Suppress Buyer Amounts

In Closing, when suppressing buyer amounts on the HUD 1 and HUD 1 2010, POCL's no longer display.

Note

POCL's continue to display on *Master Closing Statements*, *HUD 1 Attachments* and *Combined Statements*.

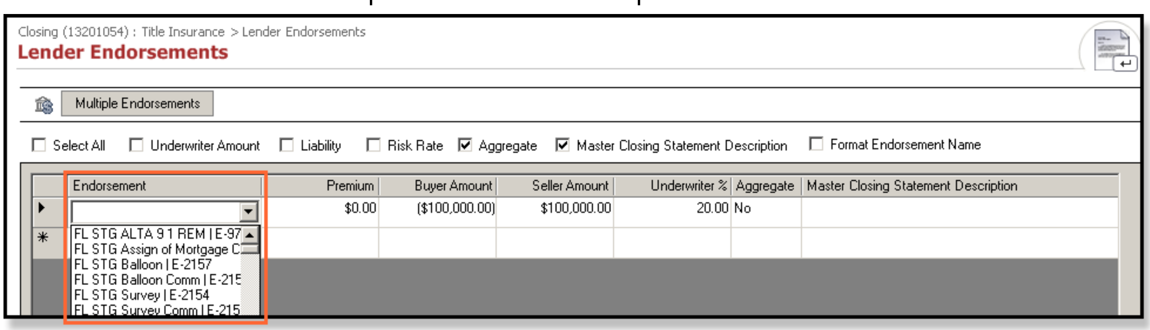
Commonly Used Endorsements

Endorsements assigned as **Common Endorsements** in Document Setup/Site Association can be viewed quickly in Closing, and Policies. These endorsements display at the top of the **Endorsements** drop-down lists, in alphabetical order, on the **Closing** and **Policies** screens.

Steps

1. From *Closing*, select **Title Insurance**. The *Title Insurance* screen displays.
2. Click the **Endorsements** button. The *Endorsements* screen displays.
3. Click the **Endorsement** drop-down list. The endorsements selected as **Common Endorsements** in *Document Setup* display in alphabetical order, at the top of the Endorsements list.

   Another way to view *Common Endorsements* is to click the **Multiple Endorsements** button.
4. Click **Save & Exit** to view multiple endorsements in alphabetical order on the Endorsements screen.



Note

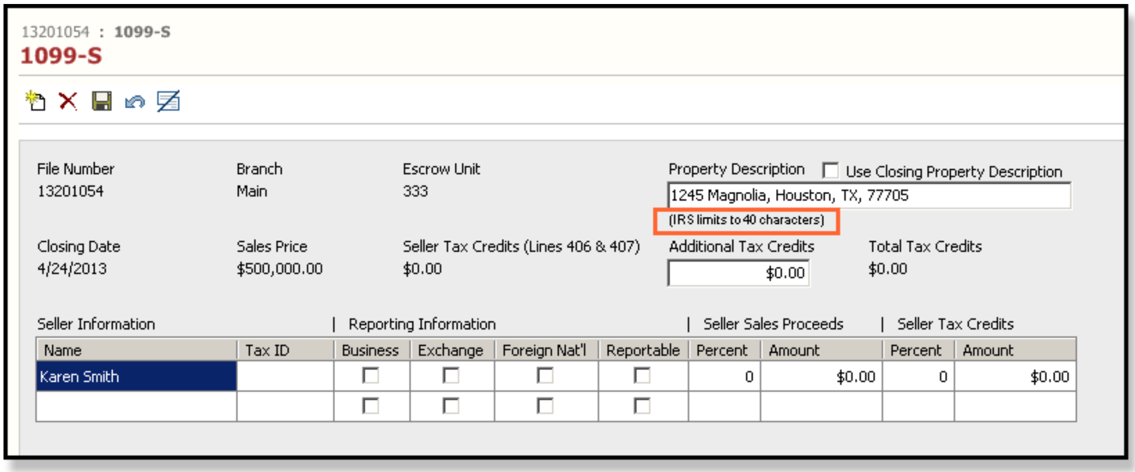
Setup is required to use this feature. Please Contact Customer Care for assistance.

1099-S

Two enhancements have been added to the *1099-S* screen in AIM+.

Property Description Limited to 40 Characters

A new item has been added under the *Property Description* field, **(IRS limits to 40 characters)** on the *1099-S* screen.

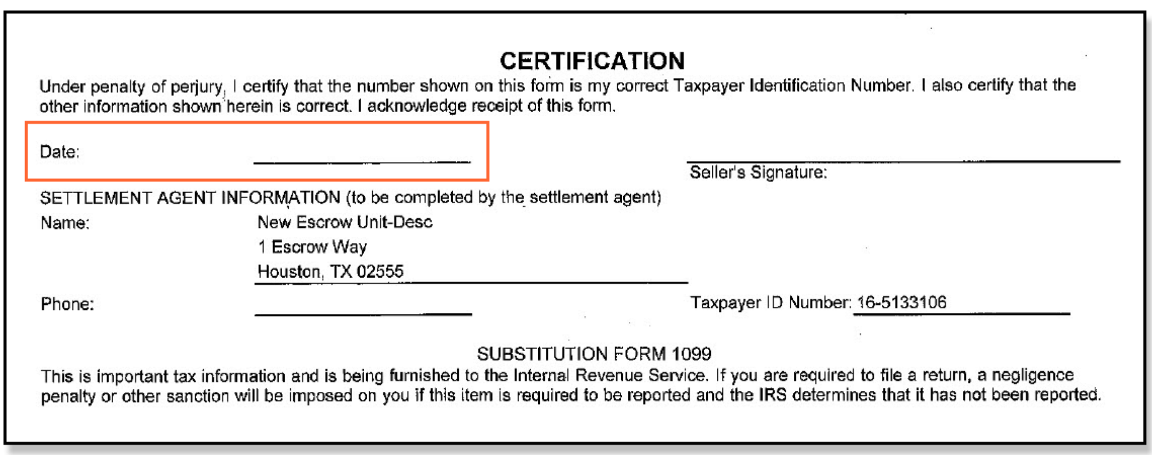


Note

You can enter any number of characters in the Property Description field, however, when printed, only 40 characters display. Anything beyond the 40 character limit will not print on the 1099-S worksheet.

Enter the Date

Under the *Certification* section on the **1099-S worksheet**, the date no longer defaults to the Closing date. The **Date** field now displays blank on the printed worksheet.



CERTIFICATION

Under penalty of perjury, I certify that the number shown on this form is my correct Taxpayer Identification Number. I also certify that the other information shown herein is correct. I acknowledge receipt of this form.

Date: ____________________ Seller's Signature: ____________________

SETTLEMENT AGENT INFORMATION (to be completed by the settlement agent)

Name: New Escrow Unit-Desc
1 Escrow Way
Houston, TX 02555

Phone: ____________________ Taxpayer ID Number: 16-5133106

SUBSTITUTION FORM 1099

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction will be imposed on you if this item is required to be reported and the IRS determines that it has not been reported.

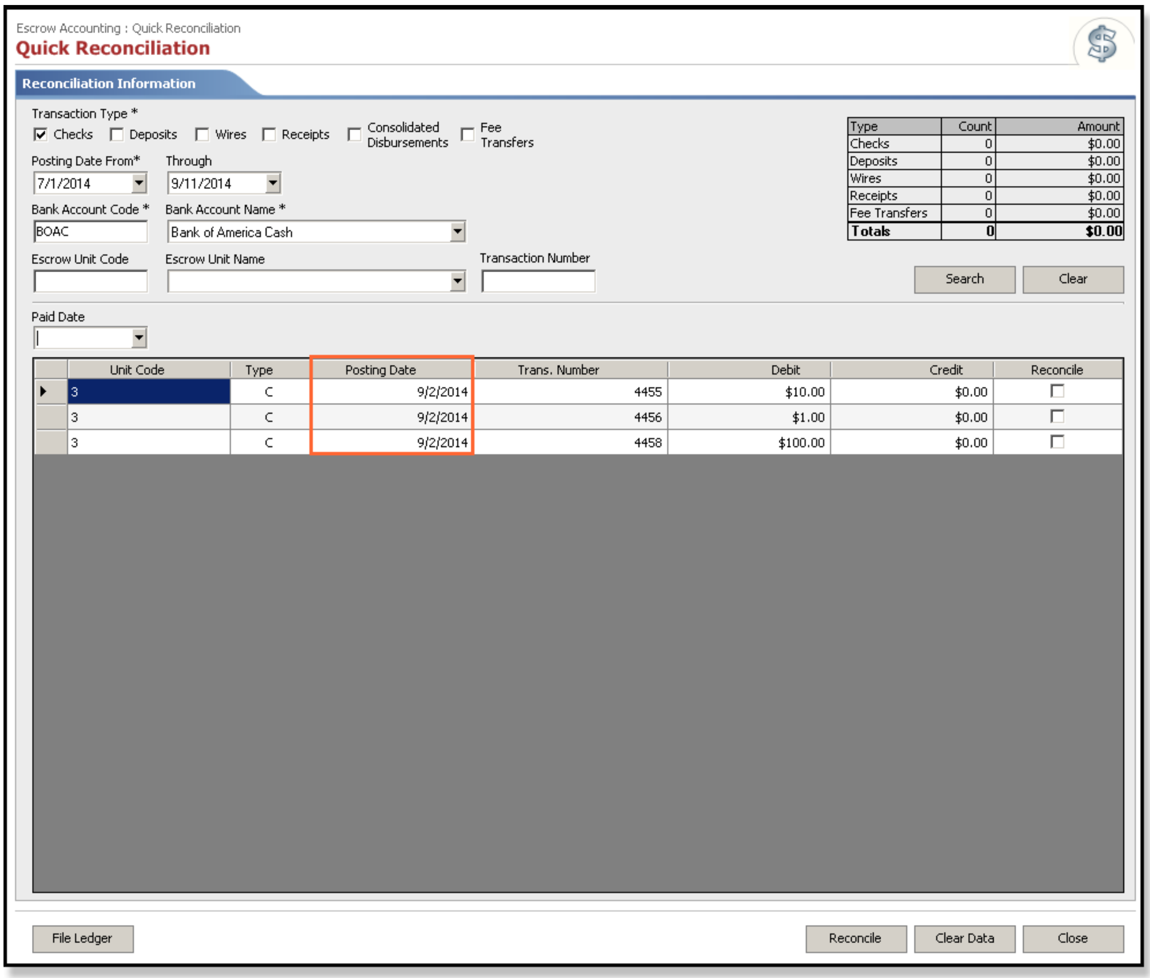
Escrow Accounting

Posting / Deposit Date on Quick Reconciliation

A new column, **Posting Date**, has been added to the *Quick Reconciliation* screen to make it easier to reconcile bank statements.

If the transaction is a **deposit**, the date shown in the **Posting Date** column is the **Deposit Date**.

If you have multiple figures on the bank statement and Quick Reconciliation screen, this new column makes it easier to distinguish the difference between the like amounts.



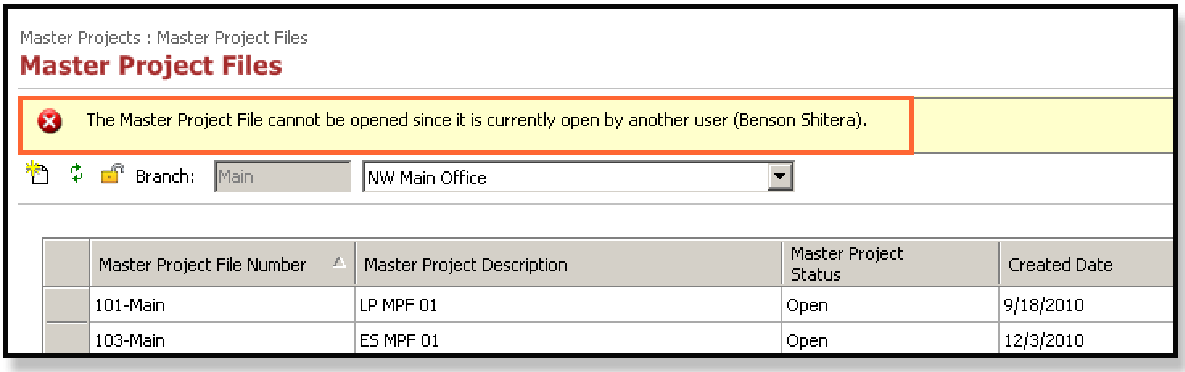
Master Projects

Unlock Master Project Files

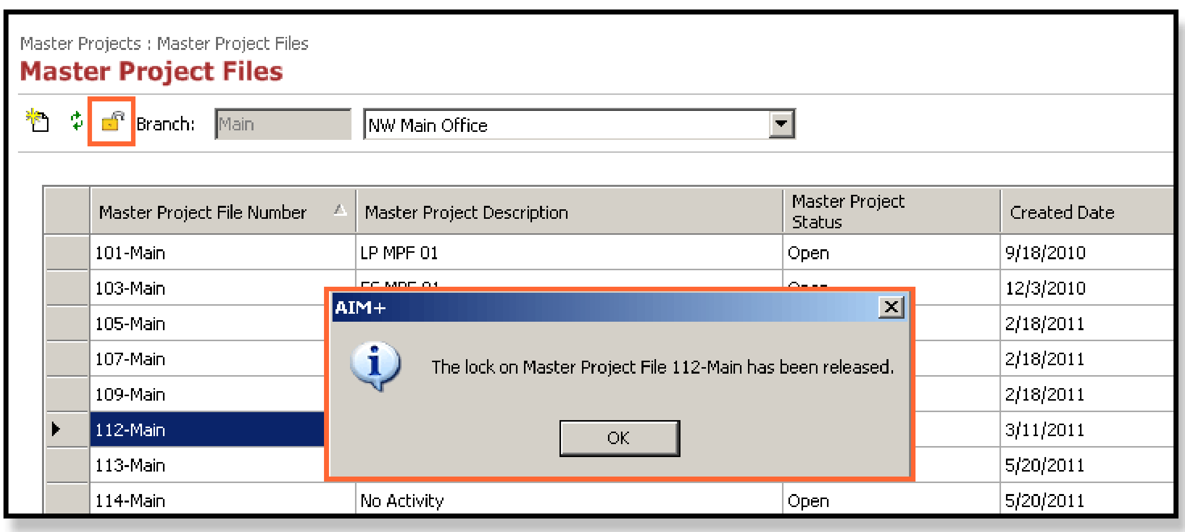
A new button, **Unlock**, has been added to Master Projects with the *Unlock* permission. Click this button to unlock and access Master Project files that are locked by another user.

Steps

1. From the *Master Projects* module, double-click to open a **Master Project** file.
2. If the MPF is locked an error message displays, indicating the MPF is open and the user who has it open.



3. Click the **Unlock** button. A confirmation message displays, indicating the file is no longer locked.



4. Click **OK**. The Master Project File screen opens and displays.

Note

Once the Master Project File is unlocked, the original user receives a message, "*Your session will be terminated to clear a Master Project file lock. You will need to restart AIM+*".

Performance Enhancements

Parties

- The **Party Search** feature has been enhanced to process criteria more quickly in Parties.

Defects

The following defects were addressed in **AIM+ 5.3**:

Order

- Multiple PINs no longer create hundreds of order sheet pages.

Properties

- Multiple subdivisions on an order no longer cause hundreds of pages to print.

Parties

- Payoff lender Loan Amounts no longer appear within the Title Insurance **Loan Amount** drop-down list.

Policies

- Red "retrieved" type Endorsements are no longer available to be transmitted when parent policy has been voided.
- When the parent policy is voided, AIM+ deletes incomplete endorsements, as well as endorsements that have not been transmitted.
- Policy transmittal no longer picks up non-serialized records.

Documents

- When emailing from the *Document Editor*, only documents that are deliberately attached are included.

File Search

- When a new search is initiated in *File Search*, old data is completely cleared for the new search.

Closing

- The scroll bar no longer disappears on the *Closing Statement Settlement Statement* (CSV) when a property file is opened via the *Master Closing Statement*.
- **Underwriter Premium percentage** of 100% entered on the *Closing/Title Insurance* screen now flows properly to the *Policies* screen when the retrieve option is used.

Escrow Accounting

- Performance has increased when opening a File Ledger from Escrow Accounting.
- The **Reconciliation Detail Report** now calculates *CD Amount* correctly.
- Cancelled checks no longer identify as chargebacks on the File Ledger.

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 Stewart Workplace or Title Workplace, 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.