

AIM+[®]

Release Notes

August 7, 2015

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AIM+ 5.4.2 Release Notes

AIM+ 5.4.2 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: August 7, 2015

New in This Release

An overview of new features and modifications to AIM+ 5.4.2 include:

- New ALTA Settlement Statements have been added to Closing as Settlement Statement options in AIM+. Refer to [ALTA Settlement Statements](#) for more information.
- A new button, POC, has been added to each fee detail screen. Select this button to add up to three POCs per fee detail on the Closing Disclosure and ALTA Statements. Refer to [Multiple POCs](#) for more information.

Closing

ALTA Settlement Statements

New **ALTA Settlement Statements** are replacing the Stewart Settlement Statements in *Closing*. Print options for the ALTA Borrower/Buyer's Settlement Statement and the ALTA Seller's Settlement Statement are available on the Generate Closing Documents pop-up window.

Document Name	Suppression
Closing Disclosure	No suppression
Seller's Closing Disclosure	No suppression
ALTA Borrower/Buyer's Settlement Statement	No suppression
ALTA Seller's Settlement Statement	No suppression
1099-S Worksheet	No suppression
Policy Premium Report	No suppression
Disbursement Worksheet	No suppression



For more information on printing ALTA Settlement Statements, refer to AIM+ Online Help and search for the section labeled, *Print Options*.

ALTA Statement Categories

Information from the Closing Disclosure flows to the ALTA Settlement Statements. Header information of the ALTA Statements can be edited in Parties. Sections of the Closing Disclosure Settlement Statement View render fees on the ALTA Settlement Statements into specific categories.



Note

Sections of the ALTA Statements that are left blank do not display on the printed statement.

ALTA Statement Category	Section of AIM+ (Charge Group)
Financial	K/M. Due at Closing L/N. Paid by or on Behalf of Borrower N. Due from Seller at Closing
Prorations/Adjustments	K/M. Adjustments Paid by Seller K/M. Due at Closing, K. Adjustments L/N. Adjustment Unpaid by Seller L/N. Paid by or on Behalf of Borrower L. Other Credits L. Adjustments N. Due from Seller at Closing
Loan Charges – These charges are grouped according to the selected Lender/or Payee on Line 202 from the following sections.	A. Origination Charges B. Did Not Shop For – Loan Charges C. Did Shop For – Loan Charges F. Prepays
Other Loan Charges – These charges display all other charges that do not include the selected Lender from the following sections.	A. Origination Charges B. Did Not Shop For – Loan Charges C. Did Shop For – Loan Charges
Title Charges & Escrow/Settlement Charges	B. Did Not Shop For – Title Charges C. Did Shop For – Title Charges H. Other Costs – Title Charges
Commission	H. Other Costs - Commissions
Government Recording and Transfer Charges	E. Taxes and Other Government Fees
Impounds	G. Initial Escrow Payment at Closing
Payoff(s)	K/M. Due at Closing N. Due from Seller at Closing L/N. Adjustment Unpaid by Seller

Miscellaneous	B. Did Not Shop For – Loan Charges C. Did Shop For – Additional Charges C. Did Shop For – Loan Charges F. Prepays H. Other Costs – Additional Charges H. Other Costs – Premiums J. Total Loan Costs
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Multiple POCs

A new button, **POC**, has been added to each fee detail screen in Closing and Title Charges. Multiple POCs display on the printed Closing Disclosure as well as printed ALTA Settlement Statements. Click the POC button to add up to three POCs per fee detail.

The screenshot shows a fee detail form with the following fields:

- Payee Code: MA1
- Payee Name: Mary Adams
- POC Amount: \$50.00
- POC By: Lender
- POC button: A small button labeled "POC" is highlighted with a red box.
- Fee Details: Radio buttons for "Did Not Shop For" and "Did Shop For".
- Closing Disclosure Description Title: Lender's Policy
- Additional Closing Disclosure Description: Lender's Policy
- Closing Statement Description Title: Title - Lender's Policy to Mary Adams

Use the **POC By** drop-down to select a party other than Buyer/Borrower and Seller.

The "Multiple POCs" dialog box contains the following information:

- POC 1: POC Amount \$12.00, POC By Buyer/Borrower
- POC 2: POC Amount \$10.00, POC By Seller
- POC 3: POC Amount \$20.00, POC By Lender
- Buttons: Save & Exit, Cancel

If more than one POC Amount has been entered on the fee line, the POC Amount textbox is disabled. Click the **POC** button to view or edit the Multiple POCs.

This screenshot is similar to the first one but with a red box around the POC Amount and POC By fields. The POC Amount field is disabled (grayed out). The Closing Statement Description Title is updated to "Title - Lender's Policy Premium - \$200.00 to M".



Note

Multiple POCs **only** apply to the Closing detail screens in **Closing Disclosure** data entry. This feature does not affect the HUD 2010, HUD 1 or Closing Statement data entry.

Defects

The following defects were addressed in **AIM+ 5.4.2**:

Closing

- Recording fee lines are now calculating properly.

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.