

AIM+[®]

Release Notes

October 16, 2015

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AIM+ 5.4.4 Release Notes

AIM+ 5.4.4 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: October 16, 2015

New in This Release

An overview of new features and modifications to AIM+ 5.4.4 include:

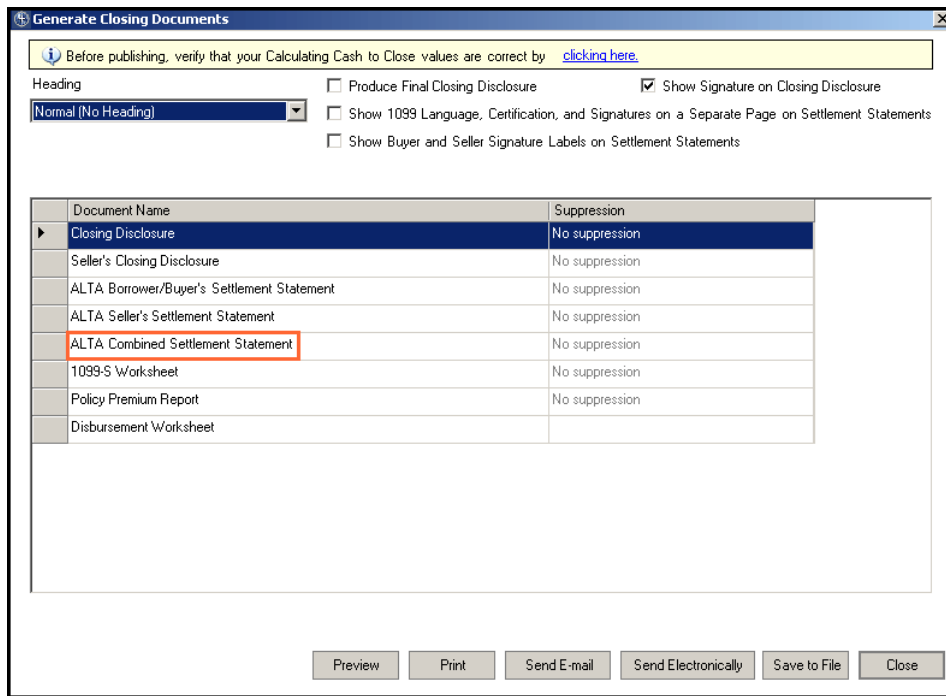
- A new **ALTA Combined Settlement Statement** has been added to *Closing*. Refer to [ALTA Combined Settlement Statements](#) for more information.
- **Ernst Publishing** now calculates all **recording fees** for AIM+ HUDs, Closing Statements and Closing Disclosures. Refer to [Ernst Integration Recording Fees](#) for more information.
- Calculate endorsements based on a **Closing Disclosure Premium** in AIM+. Setup is required for this feature. Refer to [Closing Disclosure Premium to Calculate Endorsements](#) for more information.
- If you use the **AIM+ Management Console** to generate reports, please note that some income values on orders that use the Closing Disclosure may be incomplete. Refer to [AIM+ Management Console](#) for more information.

Closing

ALTA Combined Settlement Statements

A new **ALTA Combined Settlement Statement** has been added to *Closing*. This statement contains both Borrower/Buyer and Seller Closing Disclosure information into one Combined Settlement Statement.

A print option is available on the **Generate Closing Documents** pop-up window.



Sections of the Settlement Statement View display within categories on the ALTA Combined 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 to (Lender) - These charges are grouped according to the selected Lender/or Payee	A. Origination Charges B. Did Not Shop For – Loan Charges

on Line 202 from the following sections.	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 B. Did Not Shop For – Title Charges C. Did Shop For – Loan Charges Title Charges & Escrow/Settlement 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	Loan Charges – Listed alphabetically across both groups: B. Did Not Shop For C. Did Shop For Additional Charges – Listed alphabetically across both groups: C. Did Shop For H. Other Costs Premiums H. Other Costs Prepays F. Prepays Title Charges – Listed alphabetically across both groups: B. Did Not Shop For H. Other Costs Lender Credit J. Total Loan Costs



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

Closing Disclosure Premium to Calculate Endorsements

By default, endorsements on a Closing Disclosure are calculated and based on the Premium amount. Users have the option to calculate endorsements from a Closing Disclosure Premium on the Title Insurance line 1109. However, each Closing Disclosure template must be enabled with this feature in Closing Setup. Contact your administrator for more information.

AIM+ Management Console

Effective **October 3, 2015**, the new CFPB regulations for TRID are effective including the use of the new *Closing Disclosure Form*.

If you use AIM+ Management Console to generate reports, then please note that any **AIM+ Management Console Report** that includes income values such as *Title Insurance Premiums*, *Settlement Fees* and/or *Disbursement Group Totals*, or that is based on the **Premium Disbursement Date**, may be incomplete for orders that use the new *Closing Disclosure Form*. Modifications to AIM+ will be added in a future release to address this.

Integration

Ernst Integration Recording Fees

For the latest, up-to-date rates, the Recording Fees screen in AIM+ now integrates with Ernst Publishing. This integration affects all HUDs, Closing Statements and Closing Disclosures. The rates returned on the Recording Fees screen are dependent on the property address on the file.

A yellow message bar displays for users in states/districts where additional questions are required to calculate correct rates. In this case, simply click the Calculate button to answer additional questions regarding the specific region and rates.

No message displays for property addresses in states/districts where no additional questions are required to calculate the recording fees. Simply use the Recording Fees screen as previously designed to calculate rates. The Ernst Publishing website has been integrated with this AIM+ screen in a way that a seamless import of rates can be made automatically.

Steps

1. In *Closing*, select the template from the Settlement Statement drop-down.
2. Select a Section containing recording fees, such as in the Closing Disclosure template, *Section E. Taxes and Other Government Fees*.
3. From the drop-down, select a recording fee. The Recording Fees screen displays.
4. If the state/district requires additional information, a yellow message displays at the top of the screen. Click the **Calculate** button to display questions to answer to calculate the rates. If no additional information is required, the fees display automatically.

Recording Fee Type	Fee Description	No. of Pages	Fee Amount	Fee Buyer Amount	Fee Seller Amount
Assignment		2	\$0.00	\$0.00	\$0.00
Total		0	\$0.00	\$0.00	\$0.00

5. Select the Location from the drop-down.
6. Answer any required Yes or No questions by selecting the appropriate radio button.
7. Click **Save & Exit** to finish. The calculated recording fees display on the Recording Fees screen.



For more information on calculated recording fees with the new Ernst Integration, refer to AIM+ Online Help and search for the section labeled, *Recording Fees and Transfer Charges*.

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.