



# **AIM+<sup>®</sup> 6.9**

Release Notes

January 21, 2018

*For Independent Agencies Only*

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# AIM+ 6.9 Release Notes

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AIM+ 6.9 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 21, 2018**

# Integrations

## Stewart Access

### Searching Transaction Codes for Policies and Endorsements

TFS25407

For added clarification, the Transaction Code textbox has been renamed **Search Transaction Code** on the *Policies and Endorsements* screen.

In addition, you can use the **Search Transaction Code** textbox to perform a search of Stewart Access policies and endorsements transaction codes.

The screenshot shows the 'Policies' screen in Stewart Access. The title bar indicates 'S24954\_REG : Policies'. The main window title is 'Policies'. Below the title bar, there are several icons for file operations. The main content area is titled 'Not Transmitted Policy: M-0000-XXXXX3065 DRAFT'. The 'Total File Premium' is \$0.00. The 'Policies' list on the left shows 'M-0000-XXXXX3065' and 'E-0000-XXXXX0827'. The main form contains various fields for policy details, including Underwriter (STGC), Agent (060062), Transaction Type (New), Total Premium (\$0.00), Form Name (STGC Arkansas JAcket), Policy (M-9702), Covered Party, Serial Number (XXXXXX3065), Policy Date (08/10/2017), Issue Date, Property (Property AR), County / State (Arkansas / AR), Lender (Bank of Texas), Agency Location (StewartAccess Test Agen), ReFi, Reissue, Liability (\$25.00), Gross Premium (\$0.00), Risk Rate (\$0.00), UW Remittance (\$0.00), Add'l. Liability (\$0.00), Reissue Liability (\$0.00), Premium Tax (\$0.00), Municipality, Parish/Rate Code, Agent Parish Code, Policy Property Type (Residential), HOI, Treaty Reinsurance Code, Auth. Code, and checkboxes for Rate Neg., Reinsurance, Coinsurance, and Reissue Policy. A red box highlights the 'Search Transaction Code' field. Below this field are two grids: 'Available Transaction Codes' and 'Selected Transaction Codes \*'. The 'Available Transaction Codes' grid lists codes and descriptions: 201 (Loan Single Issue), 242 (ALTA Expanded Coverage Residential...), 2424 (Expanded Coverage loan policy with li...), 401 (Simultaneous Issue - Refinance), 401 (Simultaneous Issue - Loan policy liabil...), and 903 (Loan Refinance).

### Using the Search Transaction Code Field

Simply type your entry into the **Search Transaction Code** textbox, and click **Enter** or the **Tab** key. AIM+ performs a search within the *Available Transaction Codes* list grid.

### Single Search Result

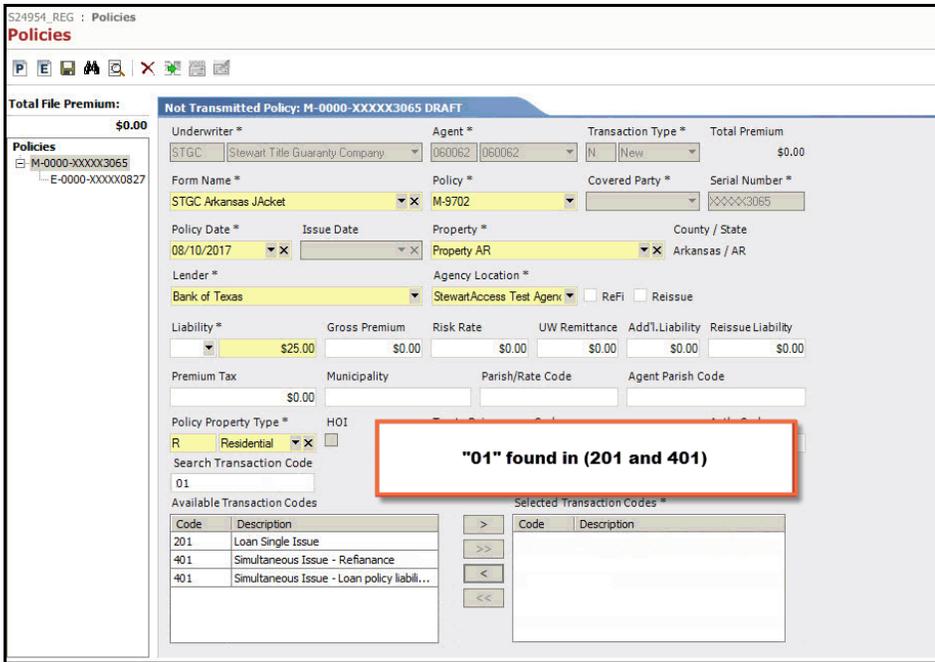
If a single result is found based on provided search criteria, then AIM+ automatically moves that transaction code (along with its description) to *Selected Transaction Codes* list grid. The selected transaction code is then removed from *Available Transaction Codes* list box.

### Multiple Search Results

If multiple search results are found in the *Available Transaction Codes* list box, you will need to manually move the desired transaction code to the *Selected Transaction Codes* list box. Simply select the desired transaction code, and click the right arrow button to move it to the *Selected Transaction Codes* list box.

When you enter in your search criteria, AIM+ finds similarly matching codes or descriptions. These search results display in the Available Transaction Codes list box. Partial search criteria can also be used to locate transaction codes.

The example below shows that by entering **01** into the Search Transaction Code field, all matches that contain **01** in their code, or description display.



The screenshot shows a software interface for policy management. A search for transaction code '01' is performed, and the results are displayed in a red-bordered box: **"01" found in (201 and 401)**. The interface includes various fields for policy details such as Underwriter, Agent, Transaction Type, Form Name, Policy, Covered Party, Serial Number, Policy Date, Issue Date, Property, Agency Location, Lender, Liability, Gross Premium, Risk Rate, UW Remittance, Add'l. Liability, Reissue Liability, Premium Tax, Municipality, Parish/Rate Code, Agent Parish Code, Policy Property Type, HOI, and Search Transaction Code. The Available Transaction Codes list shows:

Code	Description
201	Loan Single Issue
401	Simultaneous Issue - Refinance
401	Simultaneous Issue - Loan policy liabil...

If a perfect match is found, that transaction code displays in the **Selected Transaction Codes** list box.



### Note

If no matching transaction code is found, the error message displays, **Search could not find any matching Transaction Codes.**

It is recommended that you *do not* attempt to enter the entire transaction code and description in the Search Transaction Code field, as an error could result. Type in either the code number itself, a partial code number, or a partial description to allow the system to return similar, if not exact, results from *Stewart Access*.

# Lender Connect

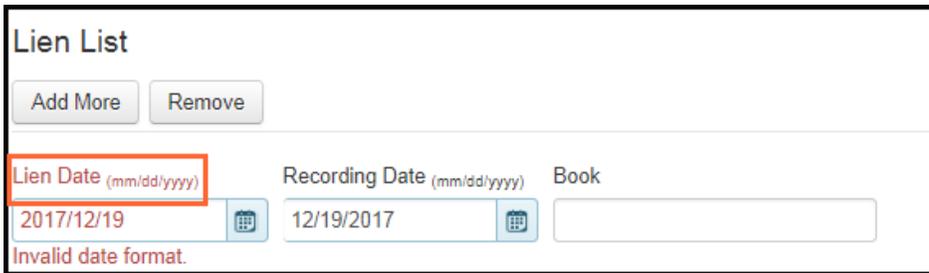
## Date Format Messages

TFS26526 (INC0626317)

TFS26716 (INC0626317, INC0638330)

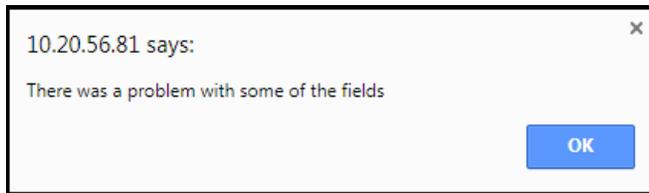
TFS26714 (INC0626317)

From *Lender Connect*, on the **Title Data Delivery** (537/385 event) screen, following changes have been made for date input field:



The screenshot shows a 'Lien List' form with two buttons: 'Add More' and 'Remove'. Below the buttons are three input fields: 'Lien Date (mm/dd/yyyy)', 'Recording Date (mm/dd/yyyy)', and 'Book'. The 'Lien Date' field contains '2017/12/19' and has a red error message 'Invalid date format.' below it. The 'Recording Date' field contains '12/19/2017'. Both date fields have a calendar icon to their right. The 'Book' field is empty.

- **Required Format** (mm/dd/yyyy) watermark has been added against date field labels to guide the user for entering data in required format. This is the standard format of entering date in AIM+ application.
- If user still enters an invalid date format then the system displays error **Invalid date format.** underneath the relevant field.



The screenshot shows a generic error message dialog box with the title '10.20.56.81 says:'. The message text reads 'There was a problem with some of the fields'. There is an 'OK' button at the bottom right of the dialog.

- A generic message to update user that entered data in one or more field(s) is invalid will also be displayed to user. This will restrict users to enter correct data before submitting 537/385 event.

## Year Range Format Messages

TFS26597 (INC0638330)

TFS26716 (INC0626317, INC0638330)

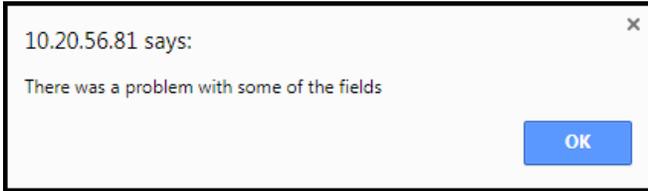
From *Lender Connect*, on the **Title Data Delivery** (537/385 event) screen, following changes have been made for year range input field:



The screenshot shows a 'Tax Year \* (yyyy or yyyy-yyyy)' input field. The field contains the value '12334' and has a yellow background. Below the field is a red error message 'Invalid Tax Year format.'

- **Tax Year Begin** field label has been changed to **Tax Year**.
- **Required Format** (yyyy or yyyy-yyyy) watermark has been added against **Tax Year** field label to guide the user for entering year range in required format.

- If user still enters an invalid year range format then the system displays error “**Invalid Tax Year format.**” underneath the relevant field.



- A generic message to update user that entered data in one or more field(s) is invalid will also be displayed to user. This will restrict users to enter correct data before submitting 537/385 event.

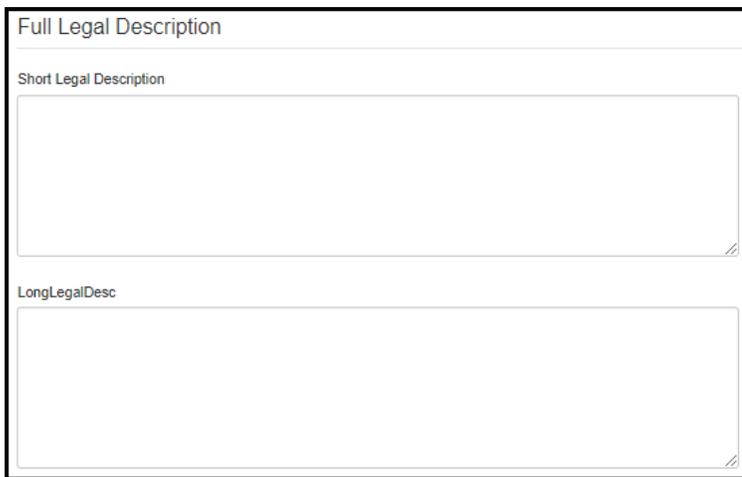
## Maximum Character Length Messages

TFS26529 INC0626373

From *Lender Connect*, maximum character length has been applied to multiple fields on the **Title Data Delivery** (537/385 event) screen. Entries that are longer than the maximum character limit will not display in their entirety.

Below includes a list of fields and their character limit.

- **Full Legal Description (Section)**
  - Short Legal Description (Max length: 314,572,500 (supports hundreds of pages of text))
  - LongLegalDesc (Max length: 314,572,500 (supports hundreds of pages of text))



- **Deed List (Section)**

- Grantee Vesting Info (Max length: 314,572,500 (supports hundreds of pages of text))

Deed List

Add More Remove

Grantee Vesting Info

- **Lien List (Section)**

- Book (Max Length: 10)
- Page (Max Length: 10)
- Document No (Max Length: 20)
- Grantee (Max Length: 90)

Lien List

Add More Remove

Lien Date (mm/dd/yyyy) Recording Date (mm/dd/yyyy) Book

Page Document No. Grantee

- **Assessors (Section)**

- PIN/APN (Max Length: 50)

Assessors

Add More Remove

PIN/APN \*

- **Tax Authority (Section)**

- Name (Max Length: 90)

Tax Authority

Add More Remove

Name Authority Type Authority Type Other Description

- **Tax Year (Section)**

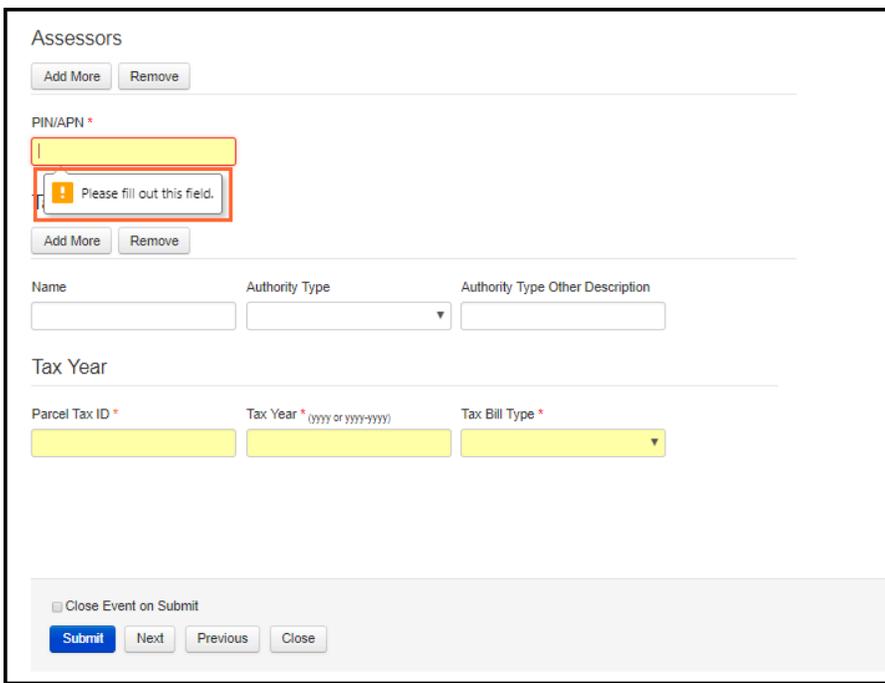
- Parcel Tax ID (Max Length: 90)
- Tax Year (Max Length: 9)



## Required Fields

*TF526532 INC0626263, INC0626244, INC0626246, INC0626296*

From *Lender Connect*, on the **Title Data Delivery** (537/385 event) screen, mandatory fields now have yellow background, and red asterisk displayed against their label. If you attempt to submit an event without providing the data in the mandatory fields, an error message **Please fill out this field** displays under respective field.





**Note**

To remove the mandatory field restriction, you must remove the entire section by clicking the **Remove** button.

If more than one instance of a section having mandatory field has been added, mandatory field restriction will have to be fulfilled for each instance.

## New Field Added for Lien List

TFS26596 (INC0626373)

From *Lender Connect*, on the **Title Data Delivery** (537/385 event) screen, a new optional field, **Document No.**, has been added for **Lien List**.

Previously, you may have entered the **Document No** in the *Book* field (which now has a 10 character limit).

The **Document No.** field now has a 20 character limit. Use the **Document No.** field to specify any instrument, reference or client file number.

**Lien List**

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Lien Date (mm/dd/yyyy)    Recording Date (mm/dd/yyyy)    Book

Page                      Document No.                      Grantee



### Note

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The data in this field can be entered in any format.

# Defects

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The following defects were addressed in **AIM+ 6.9**:

## Closing

- (TFS23407) **Title Insurance** lines no longer display an error message **2014** upon recalculating.

## Stewart Access

- (TFS23636) When an Agent adds a **new PPE, Policy Document** images are no longer deleted for **InTransit Policies**.

## Policies (Non-Stewart Access)

- (TFS26373) The correct **Policy Date** successfully sends to **EPR** for **new voided policies and endorsements**.

# Additional Information

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## 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 1.855.330.2800 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 [CustomerCare@stewart.com](mailto:CustomerCare@stewart.com).