



AIM+[®] 7.2

Release Notes

July 22, 2018

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AIM+ 7.2 Release Notes

AIM+ 7.2 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: July 22, 2018

Setup

Company Setup

New Options Available in File Number Setup

To assist with automatic resetting of file number requests, new checkboxes have been added to *File Number Setup*:

- **Reset Sequence by Month** – By selecting this checkbox, at the start of each month, when a new file is created in the system, the sequence will reset to the number entered into the *Sequence Starting Number* field.
- **Reset Sequence by Year** – By selecting this checkbox, at the start of each year, when a new file is created in the system, the sequence will reset to whatever number entered into the *Sequence Starting Number* field.

With the **Automatic Number Assignment** radio button selected, use these new checkboxes to help you automatically reset the Sequence Starting Number on file number requests.

Additional Information:

- The **Reset Sequence by Month** checkbox becomes enabled if you select the Current Month (MM), and either of these checkboxes: Current Year (YY), or Current Year (YYYY).
- The **Reset Sequence by Year** checkbox becomes enabled if you select either of these two checkboxes: Current Year (YY) or Current Year (YYYY).



Note

To make changes to File Number Information, *File Number Setup* permissions are required.

Policies

Selecting Multiple Agents for Policy Transmittal Search

The **Agent** textbox on the *Policy Transmittal* screen has been enhanced. You can now select multiple agents per Underwriter for Policy Transmittal Search.



Note

If the Underwriter has only one Agent, that Agent ID displays in the Agent textbox by default.

From the *Policy Transmittal* screen, after you have selected the Underwriter, click the **Agent** drop-down to select one or more agents for that Underwriter.

The screenshot shows the 'Policy Transmittal' screen. The 'Underwriter' is set to 'STGC Stewart Title Guaranty Company'. The 'Agent' dropdown is open, showing a list of agents with columns for Agent ID, Name, Location, and Status. The 'Select All' checkbox is checked and highlighted with a red box.

Agent	File Number	Transaction Type	Policy Number
060062			
43012			
515615			
067290			
LP1234			
060062			
43900A			
222222			
350245			
430157			
121212			
MF1234			
HA1234			
MS1234			
M125			
M126			
M127			
M128			

Click the **Select All** checkbox to select all Agent codes listed for the selected Underwriter.

The screenshot shows the 'Policy Transmittal' screen. The 'Agent' dropdown is open, and the 'Select All' checkbox is checked. The dropdown's text field now displays the selected agent codes: '060062; 43012; 515615; 067290; LP1234; 060062; 43900A; 222222; 350245; 430157; 121212; MF1234; HA1234; MS1234; M125; M126; M127; M128'.

In *Policies* section of the **Policy Transmittal** screen, a new column, **Agent**, will appear before the existing *File Number* column.

The **Agent** column contains Agent Codes/Agent ID's.

Records for multiple agents display in the Policies grid, based on the search criteria provided.

Column sorting displays in the order of Agent ID and Policy Created Date (by default).

Transmittal: Policy Transmittal

Policy Transmittal

Underwriter * STGC Stewart Title Guaranty Company Agent * Select All 060062; 43012; 515615; 067290; LP1234; 06C

From Date * 07/01/2018 Through Date * 07/11/2018 E-mail Status To muhammad.faisal@stewart.com

Manual Transmittal Folder Only policies for File Number

URL <http://qa-prism.stewart.com/EPR/EPRPackageReceiver/PackageReceiver.aspx>

Search Clear

30 Records Found

<input type="checkbox"/>	Agent	File Number	Transaction Type	Policy Number	Original Policy Number	County Code	State	PolicyDate	Liability	Additional Liability	Reissue Liability
<input checked="" type="checkbox"/>	060062	UAT_63487	New	M-0000-805760478		15	CO	07/05/2018	\$2,500.00	\$0.00	
<input checked="" type="checkbox"/>	060062	63487-7	New	E-0000-805794511	M-0000-805794168	1	CO	07/02/2018	\$0.00	\$122.00	
<input checked="" type="checkbox"/>	060062	63487-7	New	M-0000-805794578		1	CO	07/02/2018	\$1,542.00	\$0.00	
<input checked="" type="checkbox"/>	060062	63487-7	New	E-0000-805794647	M-0000-805794578	1	CO	07/02/2018	\$0.00	\$120.00	
<input checked="" type="checkbox"/>	060062	63487-7	New	E-0000-805794801	M-0000-805794578	1	CO	07/02/2018	\$0.00	\$0.00	
<input checked="" type="checkbox"/>	060062	UAT_63487	Void	M-0000-805760138		15	CO	06/28/2018	\$0.00	\$0.00	
<input checked="" type="checkbox"/>	060062	UAT_63487	New	E-0000-805896731	M-0000-805760478	15	CO	07/05/2018	\$0.00	\$0.00	
<input checked="" type="checkbox"/>	060062	UAT_63487	New	M-0000-805896798		15	CO	07/05/2018	\$15,000.00	\$0.00	
<input checked="" type="checkbox"/>	060062	UAT_63487	New	E-0000-805896805	M-0000-805896798	15	CO	07/05/2018	\$0.00	\$0.00	
<input checked="" type="checkbox"/>	060062	UAT_63487	New	E-0000-805904961	M-0000-805896798	15	CO	07/05/2018	\$0.00	\$0.00	
<input checked="" type="checkbox"/>	222222	63487-4	New	M-0000-805733008		1	CO	07/02/2018	\$1,211.00	\$0.00	
<input checked="" type="checkbox"/>	222222	63487-4	New	M-0000-805733428		1	CO	07/02/2018	\$12.00	\$0.00	
<input checked="" type="checkbox"/>	350245	UAT_63487	New	M-0000-805905398		15	CO	07/05/2018	\$19,000.00	\$0.00	
<input checked="" type="checkbox"/>	350245	UAT_63487	New	E-0000-805905405	M-0000-805905398	15	CO	07/05/2018	\$0.00	\$750.00	
<input checked="" type="checkbox"/>	350245	UAT_63487	New	E-0000-805905406	M-0000-805905398	15	CO	07/05/2018	\$0.00	\$980.00	
<input checked="" type="checkbox"/>	350245	UAT_63487	New	E-0000-805905561	M-0000-805905398	15	CO	07/05/2018	\$0.00	\$6,555.00	
<input checked="" type="checkbox"/>	350245	UAT_63487	New	M-0000-805905628		15	CO	07/05/2018	\$78,000.00	\$0.00	
<input checked="" type="checkbox"/>	350245	UAT_63487	New	E-0000-805905697	M-0000-805905628	15	CO	07/05/2018	\$0.00	\$25,000.00	

Print View Transmit Close

Deselecting Policies from Transmittal

Previously, when transmitting policies and endorsements, you could not select specific policies/endorsements to transmit – only by date range and Agent. As a result, some policies/endorsements were being held from transmittal, to ensure all associated policies and endorsements for that Agent in the designated date range were completed first.

For improved process and accuracy, you can now easily remove one or more policies/endorsements before transmitting a batch of completed policies/endorsements. From the *Policy Transmittal* screen, on the Policies grid, unselect the checkboxes for the policies/endorsements you do not want to transmit. Each record is selected by default. This feature also allows you to transmit one or more policies/endorsements at a time, upon completion.



Note

Remember, when Stewart is your underwriter in AIM, your policy register data is automatically transmitted via Stewart Access while policy images are transmitted via the policy transmittal feature. The process for transmitting a policy or endorsement in AIM+ has not changed. The only change is the ability to remove specific policies and endorsements from transmitting.

If you have unselected a Policy then Endorsements associated with that policy will be unselected automatically but can be checked again manually.

A separate transmittal job will be created for each agent that appeared in policies grid after search.

Agent	File Number	Transaction Type	Policy Number	Original Policy Number	County Code	State	PolicyDate	Liability	Additional Liability	Reissue Liability
<input checked="" type="checkbox"/>	060062	UAT_63487	New	M-0000-805760478		15	CO	07/05/2018	\$2,500.00	\$0.00
<input checked="" type="checkbox"/>	060062	63487-7	New	E-0000-805794511	M-0000-805794168	1	CO	07/02/2018	\$0.00	\$122.00
<input checked="" type="checkbox"/>	060062	63487-7	New	M-0000-805794578		1	CO	07/02/2018	\$1,542.00	\$0.00
<input checked="" type="checkbox"/>	060062	63487-7	New	E-0000-805794647	M-0000-805794578	1	CO	07/02/2018	\$0.00	\$120.00
<input checked="" type="checkbox"/>	060062	63487-7	New	E-0000-805794801	M-0000-805794578	1	CO	07/02/2018	\$0.00	\$0.00
<input type="checkbox"/>	060062	UAT_63487	Void	M-0000-805760138		15	CO	06/28/2018	\$0.00	\$0.00
<input type="checkbox"/>	060062	UAT_63487	New	E-0000-805896731	M-0000-805760478	15	CO	07/05/2018	\$0.00	\$0.00
<input checked="" type="checkbox"/>	060062	UAT_63487	New	M-0000-805896798		15	CO	07/05/2018	\$15,000.00	\$0.00
<input checked="" type="checkbox"/>	060062	UAT_63487	New	E-0000-805896805	M-0000-805896798	15	CO	07/05/2018	\$0.00	\$0.00
<input checked="" type="checkbox"/>	060062	UAT_63487	New	E-0000-805904961	M-0000-805896798	15	CO	07/05/2018	\$0.00	\$0.00
<input checked="" type="checkbox"/>	222222	63487-4	New	M-0000-805733008		1	CO	07/02/2018	\$1,211.00	\$0.00
<input checked="" type="checkbox"/>	222222	63487-4	New	M-0000-805733428		1	CO	07/02/2018	\$12.00	\$0.00
<input checked="" type="checkbox"/>	350245	UAT_63487	New	M-0000-805905398		15	CO	07/05/2018	\$19,000.00	\$0.00
<input checked="" type="checkbox"/>	350245	UAT_63487	New	E-0000-805905405	M-0000-805905398	15	CO	07/05/2018	\$0.00	\$750.00
<input checked="" type="checkbox"/>	350245	UAT_63487	New	E-0000-805905406	M-0000-805905398	15	CO	07/05/2018	\$0.00	\$980.00
<input checked="" type="checkbox"/>	350245	UAT_63487	New	E-0000-805905561	M-0000-805905398	15	CO	07/05/2018	\$0.00	\$6,555.00
<input checked="" type="checkbox"/>	350245	UAT_63487	New	M-0000-805905628		15	CO	07/05/2018	\$78,000.00	\$0.00
<input checked="" type="checkbox"/>	350245	UAT_63487	New	E-0000-805905697	M-0000-805905628	15	CO	07/05/2018	\$0.00	\$25,000.00

Selecting Multiple Agents for Pre and Post Transmittal Reports

TFS73366

You can now select multiple agents to transmit policies and accordingly you will see now multiple agents in Pre and Post Transmittal Report.

Pre and Post policy transmittal reports only display records which were selected at the time report was generated. Reports records are grouped by Agent. After clicking the **Transmit** button, you will not be able to select/unselect records in *Policies* grid.



Note

Please make sure to run the latest Pre Transmittal report if any changes were made on Policies grid after generating previous Pre Transmittal report so that the Pre and Post transmittal reports display the same data and there should be no discrepancy.

Pre Transmittal Report:

13 Records Found												
Agent	File Number	Transaction Type	Policy Number	Original Policy Number	County Code	State	PolicyDate	Liability	Additional Liability	Reissue Liability		
<input checked="" type="checkbox"/>	060062	tt12	New	M-9302-000021218		1	CO	06/04/2018	\$50,000.00	\$0.00	\$0.	
<input checked="" type="checkbox"/>	060062	63485SWP	New	M-9302-000002128		1	CO	06/07/2018	\$125,000.00	\$0.00	\$0.	
<input checked="" type="checkbox"/>	060062	63485SWP	New	E-1111-729698235	M-9302-000002128	1	CO	06/07/2018	\$0.00	\$0.00	\$0.	
<input checked="" type="checkbox"/>	060062	63485SWP	New	M-9302-000212112		1	CO	06/08/2018	\$125,000.00	\$0.00	\$0.	
<input checked="" type="checkbox"/>	060062	63485SWP	New	M-9302-000212113		1	CO	06/08/2018	\$5,400.00	\$0.00	\$0.	
<input checked="" type="checkbox"/>	060062	63485SWP	New	B-5502-212114		1	CO	06/08/2018	\$45,200.00	\$0.00	\$0.	
<input checked="" type="checkbox"/>	067290	63485SWP	New	B-3302-40		1	CO	06/07/2018	\$152,000.00	\$0.00	\$0.	
<input checked="" type="checkbox"/>	067290	63485SWP	New	M-2202-000212116		1	CO	06/08/2018	\$1,232.00	\$0.00	\$0.	
<input checked="" type="checkbox"/>	067290	63485SWP	New	E-107-633605346	M-2202-000212116	1	CO	06/08/2018	\$0.00	\$0.00	\$0.	
<input checked="" type="checkbox"/>	067290	63485SWP	New	E-1529-372317166	M-2202-000212116	1	CO	06/08/2018	\$0.00	\$0.00	\$0.	
<input type="checkbox"/>	20222	63485SWP	New	B-4204-000212110		1	CO	06/07/2018	\$0.00	\$0.00	\$0.	
<input type="checkbox"/>	20222	63485SWP	New	O-9301-000212115		1	CO	06/08/2018	\$152,000.00	\$0.00	\$0.	
<input type="checkbox"/>	20222	63485SWP	New	E-1529-746246147	O-9301-000212115	1	CO	06/08/2018	\$0.00	\$25.00	\$0.	

In this example, Agent 20222 records were not selected. If a report is generated now, it will not display this agent's records as you can see below:

PRE-TRANSMITTAL - Policy Register Report - Detail																			
7/12/2018 11:10:01 AM																			
Page 1																			
AimCompany																			
All Branches																			
Agent(s): 060062,067290																			
Agent: 060062																			
File Number	Trans. Type	Policy Number	Original Policy Number	County Code	State	Policy Date	Liability	Additional Liability	Reissue Liability	Gross Premium	Risk Rate	UW Remittance	Premium Tax	Trans. Codes	Prop. Type	Treaty Reins. Code	Auth. Codes	HOI	Agent Parish Code
63485SWP	New	M-9302-000002128		1	CO	6/7/2018	125,000.00	0.00	0.00	100.00	0.00	25.00	0.00	101	R				Y
63485SWP	New	E-1111-729698235	M-9302-000002128	1	CO	6/7/2018	0.00	0.00	0.00	0.00	0.00	0.00	0.00	101	R				Y
63485SWP	New	M-9302-000212112		1	CO	6/8/2018	125,000.00	0.00	0.00	235.00	0.00	58.75	0.00	101	R				Y
63485SWP	New	M-9302-000212113		1	CO	6/8/2018	5,400.00	0.00	0.00	123.00	0.00	30.75	0.00	101	R				Y
63485SWP	New	B-5502-212114		1	CO	6/8/2018	45,200.00	0.00	0.00	123.00	0.00	30.75	0.00	101	R				Y
#12	New	M-9302-000021218		1	CO	6/4/2018	50,000.00	0.00	0.00	60.00	0.00	15.00	0.00	101	R				Y
Number of Records: 6							350,600.00	0.00	0.00	641.00	0.00	100.25	0.00						
Agent: 067290																			
File Number	Trans. Type	Policy Number	Original Policy Number	County Code	State	Policy Date	Liability	Additional Liability	Reissue Liability	Gross Premium	Risk Rate	UW Remittance	Premium Tax	Trans. Codes	Prop. Type	Treaty Reins. Code	Auth. Codes	HOI	Agent Parish Code
63485SWP	New	B-3302-40		1	CO	6/7/2018	152,000.00	0.00	0.00	121.00	0.00	24.20	0.00	101	R				Y
63485SWP	New	M-2202-000212116		1	CO	6/8/2018	1,232.00	0.00	0.00	12.00	0.00	2.40	0.00	101	R				Y
63485SWP	New	E-107-633605346	M-2202-000212116	1	CO	6/8/2018	0.00	0.00	0.00	0.00	0.00	0.00	0.00	101	R				Y
63485SWP	New	E-1529-372317166	M-2202-000212116	1	CO	6/8/2018	0.00	0.00	0.00	0.00	0.00	0.00	0.00	101	R				Y
Number of Records: 4							153,232.00	0.00	0.00	133.00	0.00	26.60	0.00						

Post Transmittal Report:

After running the Pre Transmittal, you should not select/unselect any record and transmit the records. Once transmitted, run the report again. The report displays the Post Transmittal Report as below:

7/12/2018 11:10:01 AM		Policy Register Report - Detail														Page 1				
AimCompany All Branches Agent(s): 060062,067290																				
Agent: 060062																				
File Number	Trans. Type	Policy Number	Original Policy Number	County Code	State	Policy Date	Liability	Additional Liability	Reissue Liability	Gross Premium	Risk Rate	UW Remittance	Premium Tax	Trans. Codes	Prop. Type	Treaty Reins. Code	Auth. Codes	HOI	Agent Parish Code	
83485SWP	New	M-9302-00002128		1	CO	6/7/2018	125,000.00	0.00	0.00	100.00	0.00	25.00	0.00	101	R				Y	
83485SWP	New	E-1111-72698235	M-9302-00002128	1	CO	6/7/2018	0.00	0.00	0.00	0.00	0.00	0.00	0.00	101	R				Y	
83485SWP	New	M-9302-000212112		1	CO	6/8/2018	125,000.00	0.00	0.00	235.00	0.00	58.75	0.00	101	R				Y	
83485SWP	New	M-9302-000212113		1	CO	6/8/2018	5,400.00	0.00	0.00	123.00	0.00	30.75	0.00	101	R				Y	
83485SWP	New	B-5002-213114		1	CO	6/8/2018	45,200.00	0.00	0.00	123.00	0.00	30.75	0.00	101	R				Y	
#12	New	M-9302-000021218		1	CO	6/4/2018	50,000.00	0.00	0.00	80.00	0.00	15.00	0.00	101	R				Y	
Number of Records: 6							350,600.00	0.00	0.00	641.00	0.00	160.25	0.00							
Agent: 067290																				
File Number	Trans. Type	Policy Number	Original Policy Number	County Code	State	Policy Date	Liability	Additional Liability	Reissue Liability	Gross Premium	Risk Rate	UW Remittance	Premium Tax	Trans. Codes	Prop. Type	Treaty Reins. Code	Auth. Codes	HOI	Agent Parish Code	
83485SWP	New	B-3302-40		1	CO	6/7/2018	152,000.00	0.00	0.00	121.00	0.00	24.20	0.00	101	R				Y	
83485SWP	New	M-2202-000212116		1	CO	6/8/2018	1,232.00	0.00	0.00	12.00	0.00	2.40	0.00	101	R				Y	
83485SWP	New	E-107-633005346	M-2202-000212116	1	CO	6/8/2018	0.00	0.00	0.00	0.00	0.00	0.00	0.00	101	R				Y	
83485SWP	New	E-1529-372317166	M-2202-000212116	1	CO	6/8/2018	0.00	0.00	0.00	0.00	0.00	0.00	0.00	101	R				Y	
Number of Records: 4							153,232.00	0.00	0.00	133.00	0.00	26.60	0.00							



Note

The only records that display on Pre and Post Transmittal Reports are those associated with Agent ID's that appeared in *Policies* grid section and selected for transmittal. All Agent ID's display at the top of first page and on the last page of the printed Pre and Post Transmittal Reports.

Closing

Editing Party Signature on Closing Statements

A new button, **Edit Signatures**, has been added to the Generate Closing Documents screen. Use this button to edit or remove the party names that display in the Signatures section of the printed Closing Statement.

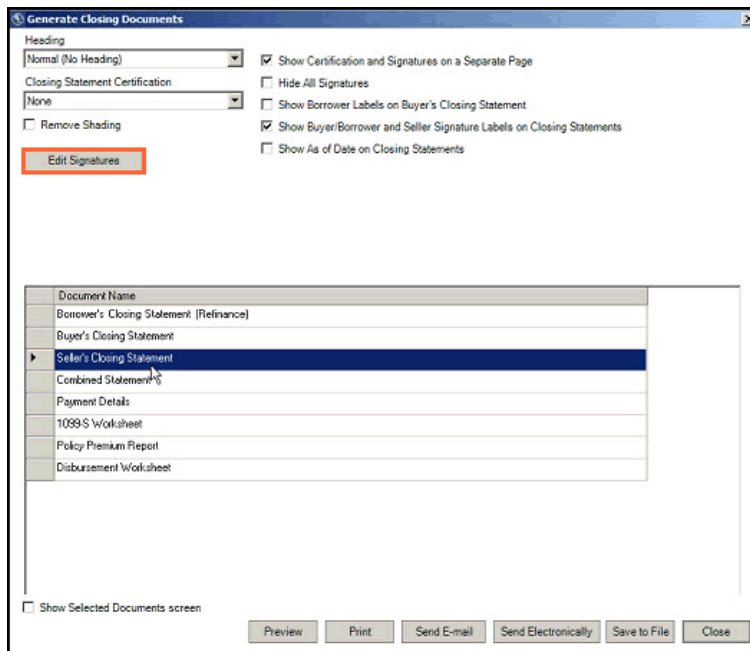
You can edit signatures on four types of Closing Statement templates only:

- **Borrower's Closing Statement (Refinance)**
- **Buyer's Closing Statement**
- **Seller's Closing Statement**
- **Combined Statement**

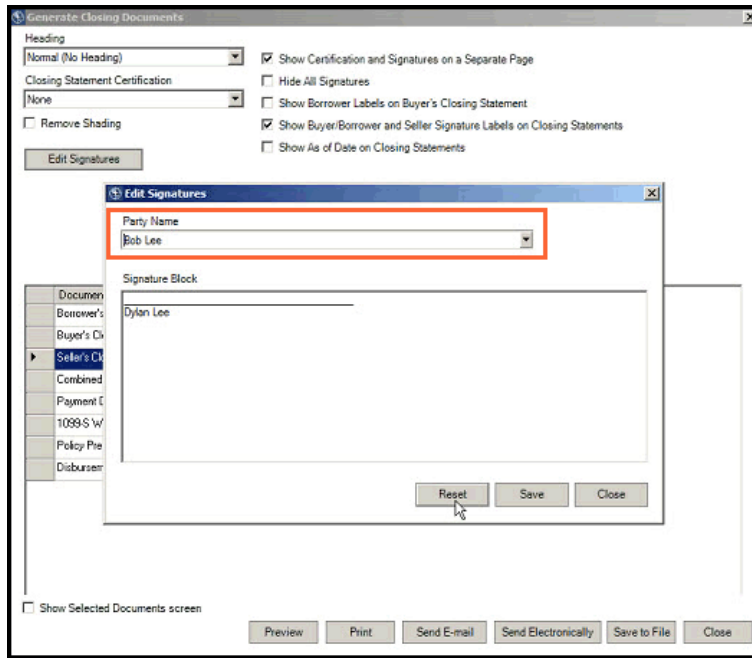
Use the steps below to edit a party signature in a Closing Statement.

Steps

1. From *Closing*, under the *Settlement Statement* drop-down, select **Closing Statement**.
2. Click the **Print** button. The *Generate Closing Documents* screen displays.
3. From the *Generate Closing Documents* screen, click the **Settlement Statement**.
4. Click the **Edit Signatures** button. The *Edit Signatures* pop-up displays.



- From the *Edit Signatures* pop-up, use the **Party Name** drop-down to select the signature you would like to edit. The party name from the drop-down displays in the section, *Signature Block*.



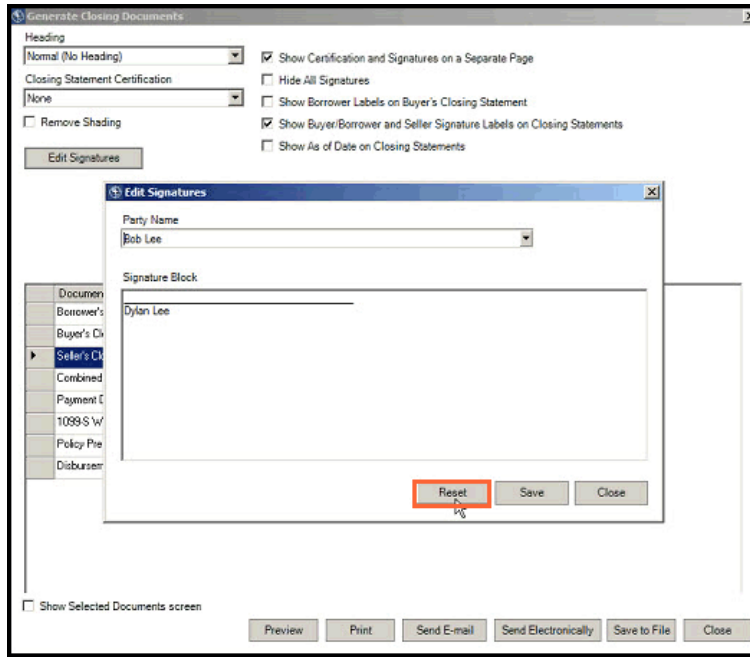
- From the *Signature Block* section, type in the name of the signature you want to display on the Closing Statement.
- Click **Save**.
- From Closing, click the **Preview** button to see your changes in the Signatures section of the Closing Statement.

Resetting a Previously Edited Signature

Follow the steps below to replace a party signature on a Closing Statement that was previously removed or edited.

Steps

1. Follow steps 1-4 above from the section.
2. From the *Edit Signatures* pop-up, use the **Party Name** drop-down to select the signature you would like to replace into the Closing Statement. The party name from the drop-down displays in the section, *Signature Block*.
3. Click the **Reset** button. After clicking **Reset**, the name selected from the *Party Name* drop-down displays in the Signature Block section and removes the previous entry.



4. Click **Save**.
5. From Closing, click the **Preview** button to see your changes in the Signatures section of the Closing Statement.

Date Added to Signature of All ALTA Statements in AIM+

A new line has been added to the *Signature page* of all **ALTA Statements** to include the **Date** with each corresponding signature.

Rebecca Lee	Date
Bob Lee	Date
Devin Langley	Date



Note

To display a signature, be sure the **Show Signature on Closing Disclosure** checkbox on the Generate Closing Documents pop-up (before printing).

Defects

The following defects were addressed in **AIM+ 7.2**:

Closing

- The rates for endorsements now calculate correctly and display the correct amount other than 0.

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 1.855.330.2800 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.