



Create Policy

To Create a Policy within AIM+, use the following steps:

Steps

1. Click the **Policies** Data Entry Group.
2. Many of the fields are unchanged. Additional fields are illustrated.

Please Note: The Issue date will not appear until the Policy is Issued.

3. Enter the **Lender**.
4. Enter the **Agency Location**.
5. If preparing a Refi or Reissue policy, click Refi or Reissue. Enter the required fields marked with asterisks.

6. Enter the remainder of the fields as you normally would.



Note: Do not forget to enter the Transaction Codes appropriate for your policy or endorsement.



7. Click **Save**. The Serial Number is provided by Stewart Access. The Serial Number is masked until the policy is issued.

1117151030 : Policies

Policies

Policy or Endorsement data saved.

Total File Premium: \$0.00

Not Transmitted Policy: M-0000-XXXXX3718 DRAFT

Underwriter *	Agent *	Transaction Type *	Total Premium
STGC Stewart Title Guaranty Company	060062 060062	N New	\$0.00

Form Name *	Policy *	Serial Number *
06 STG Loan Policy w/Ends	M-9302	XXXXXXXX3718

Policy Date *	Issue Date	Property	County / State
10/10/2016		Property 1	Aleutians East / AK

Lender *	Agency Location *
Bank of America	1980 Post Oak

ReFi Reissue



Note: You may work on the Policy in Documents while it is in Draft mode.



Note: Stewart Access provides Serial Numbers, therefore there is no need to import and maintain inventory.

8. Click **Issue**  to issue the policy.

1117151030 : Policies

Policies

Policy or Endorsement data saved.

Total File Premium: \$0.00

Not Transmitted Policy: M-0000-XXXXX3718 DRAFT

Underwriter *	Agent *	Transaction Type *	Total Premium
STGC Stewart Title Guaranty Company	060062 060062	N New	\$0.00

Form Name *	Policy *	Serial Number *
06 STG Loan Policy w/Ends	M-9302	XXXXXXXX3718

Policy Date *	Issue Date	Property	County / State
10/10/2016		Property 1	Aleutians East / AK

Lender *	Agency Location *
Bank of America	1980 Post Oak

ReFi Reissue

9. The Serial Number is unmasked and the Issue Date is populated with today's date. All other fields are dimmed and cannot be edited.

Policies

Total File Premium: \$0.00

Not Transmitted Policy: M-0000-198523718 ISSUED

Underwriter *	Agent *	Transaction Type *	Total Premium
STGC Stewart Title Guaranty Company	060062 060062	N New	\$0.00

Form Name *	Policy *	Serial Number *
06 STG Loan Policy w/Ends	M-9302	198523718

Policy Date *	Issue Date	Property	County / State
10/10/2016	10/10/2016	Property 1	Aleutians East / AK



To edit any other information on the Policy screen, you must Void  the jacket, make desired changes and reissue.



Note: Some fields may be Revised by selecting the Revise icon.  Those fields are shown below

Liability *	Gross Premium *	Risk Rate	UW Remittance	Add'l. Liability	Reissue Liability
<input type="text" value=""/>	<input type="text" value="\$250,000.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>
Premium Tax	Municipality	Parish/Rate Code		Agent Parish Code	
<input type="text" value="\$0.00"/>	<input type="text" value=""/>	<input type="text" value=""/>		<input type="text" value=""/>	
Policy Property Type	HOI	Treaty Reinsurance Code			Auth. Code
R <input type="text" value="Residential"/> <input type="text" value=""/>	<input type="checkbox"/>	<input type="text" value=""/> <input type="text" value=""/>			<input type="text" value=""/>
Transaction Code	<input type="checkbox"/> Rate Neg. <input type="checkbox"/> Reinsurance				
<input type="text" value=""/>					

If you Revised your jacket information, click Issue to “re-issue” the Policy Jacket.

10. Print the Jacket from the Documents data entry group as usual.