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Stewart Access: AIM+ Jackets

Quick Reference Card

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.

Data Entry Groups 7	1117151030 : Policies Policies						
Properties Parties	P E 🖬 🚧 🔍 🛛 🚥	i 💽 🐏 🎬 🛃					
Title Charges	Total File Premium:	Not Transmitted Policy: NEW PC	DLICY				
	\$0.00	Underwriter *		Agent *	Transaction Type *	Total Premium	
Documents	Policies	STGC Stewart Title Guaranty	Company 🔽	060062 060062 💌	N New 🔻	\$0.00	
- 1099-5	NEW POLICY	Form Name *		Policy *	Serial Number *		
 Disbursements File Notes 			▼ ×	•	0]	
CPL		Policy Date * Issue D	ate	Property *	Coun	ty / State	
Credit Distribution		• ×	▼ ×	Property 1	▼× Aleut	ians East / AK	
Tevenue Reporter		Lender		Agency Location *	DeFi Deicque		
					Rei Reissue		
		Liability * Gro	oss Premium *	Risk Rate UW Remit	ttance Add'l. Liability	Reissue Liability	
		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
		Premium Tax Mu	nicipality	Parish/Rate Code	Agent Parish C	Iode	
		\$0.00					-
		B Besidential	1	Treaty Reinsurance Code	• •	Auth, Code	
		Transaction Code					
				Rate Neo. Reinsuran	ire		
							Save & Exit Cancel

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.

Lender	Ag	jency Location *			
			🔻 🗌 ReFi 🗹 R	eissue	
Underwriter *	Original Policy Number *	Liability Amount *	Date *	Jacket Type *	
	•		▼ ×		•

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.



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Policies						
Policy or Endorsement	nt data saved.	×				
P E 🔲 🗛 🔍 >	< 號 201					
Total File Premium:	Not Transmitted Policy: M-0000-XXXXX3718 DRAFT					
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	Lender * Agency Location * Bank of America V 1980 Post Oak Refi Reissue					
Note: St	rewart Access provides Serial Numbers, therefore there is no need to imp	oort and maintain inventory.				
1117151030 : Policies Policies	to issue the policy.					
Policy or Endorsement	nt data saved.	×				
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Note: Some fields ma	y be Revised by sele	ecting the Revise icc	on. 🗾 Those fi	ields are shown	below
Liability *	Gross Premium *	Risk Rate	UW Remittance	Add'l. Liability	Reissue Liability
▼ \$250,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Premium Tax \$0.00	Municipality	Parish/Rat	e Code	Agent Parish Co	ode
Policy Property Type	HOI	Treaty Reinsurance Code		Auth. Code	
				* *	

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.