

AIM+ Preparing Policies


Important Note: This document applies to sites that are NOT integrated with Stewart Access. If your site is integrated with Stewart Access, please visit the [Stewart Access Training Center](#) for assistance with producing your policies in AIM+.


You can produce one or more title policies for an order. Once you open your file, click on the **Policies** data entry group.



Select Policy to Prepare

If this is the first policy to prepare for your file, a new policy record is automatically created so that you can begin entering policy information.

If the Title Insurance screen is complete in Closing then click the **Retrieve Policy Data** icon  to populate each field.

Otherwise, fill out each field manually. If additional policies are needed, click the **Add New Policy** icon  and follow the steps below:

Some fields in this Policy screen will automatically populate on the preview/printed policy. For example, the policy date, policy premium, and Premium Tax (if applicable).

Steps

1. Select the **Underwriter**, **Agent ID** number for the first policy to prepare. **Transaction Type** will default to **New** – do not change this field.

Underwriter *	Agent *	Transaction Type *
STGC Stewart Title Guaranty Company	49023 49023	N New

2. Select the name of the first policy to prepare in the **Form Name** field. Or in the **Policy** field, select the type and prefix. The **Serial Number** field should pull the next available serial number from Inventory in Policy Setup. If this does not automatically populate, contact CustomerCare@Stewart.com.

Form Name *	Policy *	Serial Number *	Next Number
06 ALTA Loan Policy	LP	006252019	

3. Type the effective date of this policy in the **Policy Date** field. Type the date the policy is prepared in the **Issue Date** field. The property is selected automatically in the **Property** field and no need to change.

Note: Policies and endorsements without an **Issue Date** are not included in any electronic transmittals.

4. The **Liability** should default from Order Entry. Change this amount if it is different. Enter the premium for this policy in the **Gross Premium** field and the **Risk Rate** (if applicable). The **UW Remittance** is the amount of premium that will be remitted to the underwriter for this policy. (If the **Retrieve Policy Data** icon was used, the **Gross Premium** and **UW Remittance** will populate automatically from the Title Insurance screen.) If this amount that defaults is

AIM+ Preparing Policies

incorrect, change it. If this policy includes additional liability, type in the amount in the **Add'l. Liability** field. If this policy includes reissue liability, type in the amount in the **Reissue Liability** field.

Liability	Gross Premium	Risk Rate	LW Remittance	Add'l. Liability	Reissue Liability
\$205,000.00	\$1,200.00	\$0.00	\$180.00	\$0.00	\$0.00

- 5. **Premium Tax** – If applicable for your state, type the premium tax amount.
Municipality – If applicable for your state, type the municipality code.
Parish/Rate Code – If applicable for your state, type the parish/rate code.
Agent parish Code - If applicable for your state, type the agent parish code.
Policy Property Type - If applicable for your state, type the policy property type.

- 6. Select the **Policy Property Type** and select the **HOI** check box if this is a Home Office Issue. Enter an authorization code if the liability exceeds the liability limit that is set up in Policy Setup. Typically this is set to \$1,000,000.00. (The Auth. Code will be the initials of the Underwriter’s representative who approved the amount, along with the date. For example, if John Smith approved the amount on July 1, 2018, then enter JS 7/1/18.)

Policy Property Type	HOI	Treaty Reinsurance Code	Auth. Code
R Residential	<input type="checkbox"/>		

- 7. Select the Transaction Code that identifies the policy that’s currently being prepared.

Available Transaction Codes		Selected Transaction Codes	
Code	Description	Code	Description
101	Single Issue	1000	Single Issue
201	Mortgagee Policy		
401	Simultaneous Issue		
500	Endorsement		
660	ICL Charge only Endorsement		

- 8. If you have clicked on the **Retrieve Policy Data** icon to create this policy record, select the next policy record on the left and follow same steps above.



If you did not click on the **Retrieve Policy Data** icon to create this policy, then click the **Add New Policy** icon to create another record to be manually entered.