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AIM+ 5.0 Release Notes

AIM+ 5.0 includes additional functionality, enhancements, and defect corrections. This document provides a brief explanation of what was fixed and an introduction to new features and functionality implemented with this release.

Deployment Date: August 9, 2013

New in This Release

An overview of new features and modifications to AIM+ 5.0 include:

- New options for Closing Statement Templates including additions to New Loan, Recording Fees/Transfer Taxes, and Payoffs. Refer to Closing Statement Templates for more information.
- Increased characters for Mortgage Clause in Mortgage Clause setup Refer to Order Setup for more information.
- Unused policy serial numbers can now be viewed on the Policy Inventory screen. Refer to Policy Setup for more information.
- Ability to set HOI checked box as defaulted on the Policy Screen. Refer to Set Default HOI for more information.
- Closing users can now add payee address information on HUD detail screens. Refer to Adding/Editing Payee Addresses for more information.
- AIM+ will maintain proration descriptions if the closing date and prorations are recalculated. Refer to Maintain Proration Descriptions for more information.
- Option for entering interest on payoffs to select “through”, “thru” or “to” format for statements. Refer to Additional Option for Interest on Payoffs for more information.
- Print a Closing Statement header with a Branch option and Unit name, similar to Master Closing Statements. Refer to Labels for Closing Statements for more information.
- Check box to print Buyer Statements with Borrower label headings available for Closing Statements. Refer to Print Buyers Statements for more information.
- A new button has been added to the Payoffs screen in Closing Setup for users to calculate Partial Months Use 30 Days (30-Month). Refer to Payoffs for more information.
- Select multiple endorsements on the Closing Endorsement screen. Refer to Select Single or Multiple Endorsements for more information.
- Hide page numbers on HUD for Signature pages; 1099; and Certification pages. Refer to Hide Page Numbers for more information.
- HUD page 3, all currency fields are increased to allow million dollar entries when the Edit check box is selected. Refer to Balloon Payment Amount Increase for more information.
- The PIN field in Order Entry increased to 37 characters. Refer to PIN Field Increase for more information.
- If the Primary Party Required Setting has been enabled, users must select a primary party. Refer to Required Primary Party for more information.
- State/County appears as view only fields on the Policy screen. Refer to View Only Fields for more information.
- View Tool Tips on specific fields on the Policy screen. Refer to Tool Tips for more information.
- Search by Contacts is an added option in File Search. Refer to Search by Party Contact for more information.
- Agent ID is now part of the header on the Policy Transmittal Report. Refer to Policy Reports for more information.
- New Manual Policy Transmittal option is available with an Excel format. Refer to Policy Transmittals for more information.
- Enhanced Subsequent Income Reporting. Refer to Main Revenue Report for more information.
- Ability to select Branches on the Generic Revenue Report. Refer to Main Revenue Report for more information.
- Business Development Officer now automatically populates 100% on Credit Distribution and Revenue Reporter. Refer to BDO Shadow Credit for more information.
• Subsequent Income Reporting has its own display screen with more items for users to report on. Refer to Subsequent Income Reporting Display for more information.

• Expose Order Party Contact Communication Data to the AIM+ Management Reports Console. Refer to Communication Data for more information.

• Send Customer/Customer Contact Associations from Setup to the AIM+ Management Console. Refer to Contact Associations for more information.
Setup

Closing Setup

Closing Statement Templates

A **Details** button, **Show Line** column and **Fee Description** with an **Active** check box have been added to Closing Setup for Closing Statement Templates, including New Loan, Payoffs and Recording Fees/Transfer Taxes.

**Note**

Change Template on the file and then go back to the original template to refresh changes. Users do not need to logout of AIM+.

New Loan

By selecting the **Details** button, users can view and enter a customizable **Fee Description** when Closing is accessed. Select the **Active** check box to show fees in Closing.

**Note**

Some fees in the New Loan section will not have an **Active** check box. If the **Active** check box does not appear on the Details pop-up menu, then the fee will appear in Closing.
Payoffs

Users now have the ability to set options for Payoff lines on the Closing Statement template.

A Details button has been added to all lines in Payoffs, as well as the new Borrower/Payoff lines 105 and 604-608. Selecting the Details button on these lines displays a pop-up menu with a Fee Description with an Active check box. Also, Days per Year can be adjusted by selecting one of the three below buttons. Payoff Format for Interest can also be customized.

Note

Show Lines are disabled in Payoffs.
**Recording Fees/ Transfer Taxes**

The default buyer seller split was added to *Recording Fees* and *Transfer Tax* lines. Users can now add a default line amount to *Miscellaneous Charges* lines in this section.

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**Note**

Show Lines are disabled for lines 1201-1211.

**Labels for Closing Statements**

When printing labels for closing statements, the word *Publish* has been replaced with the word *Show*. This replacement does not change the way the feature operates. Select either of these check boxes to customize the header on a Closing Statement template.
Branch Name Description for 1099 Reports

A new **Use branch description on 1099-S Worksheet** check box has been added. Select this option to select a branch description for 1099 Reports.

This also applies to escrow unit descriptions. If no escrow unit is listed on the order, the report will use the branch name. If the escrow unit is selected in a file, and the selected escrow unit has a valid **Transmitter Control Code**, the escrow unit name is used. However, if the escrow unit is selected in a file and that selected escrow unit has no valid **Transmitter Control Code**, then the branch name and description is used. If no escrow unit is selected in a file, then the branch name is used.
If this check box is not selected, upon printing or previewing the report, the branch or escrow name displays.

Note

AIM+ no longer outputs the Escrow Officer name on the 1099-S worksheet. 1099-S worksheets can be printed and/or previewed from Closing, 1099-S (node on an order) and from New Records within the 1099-S module.
Order Setup

The number of characters that can be entered into the Mortgagee Clause has increased to 500.
Party Setup

Two new fields, **Contact First Name** and **Contact Last Name** have been added when searching for parties under **Party Setup**. In addition, these search filters have also been added to further customize your search results:

- **Select All** – click to display all party contact address information.
- **Address 2** – click to filter by the party address listed in the Address 2 field.
- **City** – click to filter by city in which the party resides.
- **State** – click to filter by the state in which the party resides.
- **Postal Code** – click to filter by the postal code (zip code) in which the party resides.
Policy Setup

Unused policy serial numbers are available for view when checking inventory status.

You now have the ability to see detail inventory status per policy combo across all agents. The Policy Inventory status shows Used, Available and Discarded serial numbers so that you can easily detect which serial numbers are available or unavailable for use.

Steps

1. Under Policy Inventory Setup, select Policy Inventory.
2. Highlight the entire line of the policy and click View Status. You must select the entire line in order to enable the View Status button. If not, then the button is disabled.
3. The Detail Inventory Status window displays. Notice the Policy Status column displays the state of the policy serial number.

4. When finished, click OK.
Custom Layout

Set Default HOI

A new HOI check box has been added to set the default for the Home Office Issue (HOI) per Underwriter in Custom Layout on new files. To select the default HOI for a policy and/or endorsement, click Home Office Issue under Policy. Selecting True from the drop-down list will enable the check box to appear on the Policies screen to select a default HOI on a new file. This default will apply to all policies and endorsements. Click Save & Exit to continue.

From the Policies screen, users can now see the HOI check box on a new policy. With the check box selected, users will have a default Underwriter for this policy. Click Save & Exit to save your changes.
Once changes have been saved to a new policy, users can access endorsements for that policy to select the HOI check box. With the check box selected, users will have a default Underwriter for this new endorsement. Click Save & Exit to save your changes.
Closing

The following changes have been made to the Closing section of AIM+ for this release.

Add/ Edit Payee/ Remitter Address

Payee/Remitter address information can now be added or edited from any Closing detail screen. This information flows to the Disbursement Worksheet; but does not update the Parties screen. If a line has been disbursed or split or if the party is a Fee Transfer, then the Add/Edit Payee Address icon is disabled and cannot be selected.

Note

At this time, this feature does not apply to Master Closing Statements.

Adding/ Editing Payee Addresses

Complete these steps to add or edit a payee address.

Steps

1. With a Closing detail screen open, select the Add/Edit Payee Address icon. The Closing Party Address screen displays.
2. With this screen open, locate Party Address. You can:
   • Add a new address if one does not already exist, or
   • Edit the existing address
3. When finished, click Save and Exit to save your changes.

Using the Generate Option
Click Generate to pull the address from a party on the file. This button is only enabled when a party is a party on a file, not when it is entered on the fly or pulled in from Party setup.

Additional Information
• If the address has changed in the Disbursement Worksheet, then the address changes in Closing.
• All parties with the same Payee/Remitter information are updated.
• You can create a different address for only one of the Payee/Remitters by slightly changing the Payee/Remitter name, then adding the address. This information flows to the Disbursement Worksheet as a separate line item with the appropriate address.
**Maintain Proration Descriptions**

Proration descriptions are now maintained when changes are made to the Closing or Proration dates or when proration amounts are recalculated. A new, **Additional Description** field has been added to retain custom text changes. Any text entered in this field displays after the date range on the Closing Statement.

**About Date Ranges**

Additional text can also be entered in the Closing Statement Description field. Any text entered in this field displays before the date range on the Closing Statement.

Some changes have been made to the way date ranges display on Closing Statements.

- You can no longer enter a date range as part of entering the Closing Statement Description. Rather, date ranges are now entered using the **From Date** and **To Date** fields.
- A new **Proration Format** section has been added. Use the options in this section to determine how date ranges should display on Closing Statements. Select the **Hide Base Amount and Period** check box to prevent date ranges from displaying on the details screen and the Closing Statement.
When left cleared, date ranges display as selected on the Closing Statement. In the image below, notice the following:

- The proration format selected is, To
- Text entered in the **Closing Statement Description** field displays *before* the date range
- Text entered in the **Additional Description** field displays *after* the date range
New Calculation on Payoff Lines in Closing

A new, **Partial Months Use 30 Days (30-Day Month)** option has been added to the Payoffs line in Closing. Select this option when you want to calculate payoffs according to a 30 day month and show the exact number of days included in the calculation.

Additional Option for Interest on Payoffs

A new, **Payoff Format for Interest** option has been added to the Payoffs screen. Use this option to select the payoff format to use for closing statements; options include:

- **Interest Good Through (Date) Per Diem**
- **Interest from (Date) to/thru (Date) at Per Diem**
Closed or Cancelled Files
A new proration screen displays for all files that have a file status other than Closed or Cancel after a valid date range. Valid date formats include; MM/DD/YYYY or M/D/YYYY.

Note
Typing in a different spelling in the date range, changes the format.

Payoff per Diem Amount
On the Payoff detail screen, if the Principal Balance is updated, the existing Per Diem Amount will not be reset if the Interest Rate is set to 0%.

Texas R-8 Rule
Corrections were made for the Rounding issue with the Texas R-8 rule for Rates.

Print Buyers Statements
Two new check boxes have been added to the Generate Closing Documents screen, Show Borrower Labels on Buyer’s Closing Statement and Show Buyer/Borrower and Seller Signature Labels on Closing Statements. Select these options when you want to change the label headings of the Closing Statement from Buyer to Borrower; this information also displays in the arbitrage language on the Closing Statement.
Select Single or Multiple Endorsements

Two new buttons have been added to the Closing Endorsements screens: Endorsements and Multiple Endorsements. Click the Endorsements button when you want to copy all available endorsements.
Or, click **Multiple Endorsements** to:

- View all endorsements on one screen, at once
- Select a single endorsement multiple times
- Select multiple endorsements at once
From the *Available Endorsements* list:

- Click the **single arrow** to select a single endorsement and move to the *Selected Endorsements* list
- Click the **double arrow** to copy all endorsements to the *Selected Endorsements* list
- Click the to delete a selected endorsement from the list
Hide Page Numbers

Two new check boxes have been added to the Generate Closing Documents screen: Show Certificate and Signatures on a Separate Page and Show 1099 Language and Signatures on a Separate Page. Selecting these options shows page numbers on HUD Signature Pages 1099 and/or Certification. If preferred, leave cleared to hide this information.

Once selected, be sure to Preview the document to determine what the document will look like, prior to printing. When ready, you can print, email, or save the document changes.

Additional Information about the HUD 1A 2010

- Refinance pages on the HUD 1A 2010 may opt for hiding the page numbers on the signature pages of the Certification page; however, page numbers cannot be hidden on the 1099.
- Only the HUD 1 2010 and HUD 1A 2010 display a check box; this feature is not configurable in Setup. If you have not selected to hide signature pages, and page 2 extends to a second page that feeds onto a signature page, then you cannot remove the page number.
- If page 2 of the HUD page extends to a second page, and you have selected to hide page numbers on the signature page, then the page number will be hidden.
Balloon Payment Amount Increase

Select the **Edit Loan Terms (N/A or text is required)** check box to increase the number of characters in the currency fields displayed on page 3 of the HUD. When selected, you can enter balloon payments in the amount of up to 13 characters before the decimal and 2 characters after.
Properties

PIN Field Increase

The maximum number of characters that can be entered in the PIN (Partial Identification Number) field in Order Entry has increased to 37. This number attaches to documents, and formats with checks. One exception, only 30 of the 37 characters will come through on a policy transmittal.
Parties

Required Primary Party

If the Primary Party Required setting has been enabled, then a primary party must be selected prior to exiting the Parties screen. Attempting to exit without making a selection displays a pop-up menu requesting a selection be made prior to continuing.
Policies

Orphan Endorsements for Retired Policies

Two new options have been added to Policies when adding new orphan endorsements: a new same parent policy and a new parent policy.

You can select a retired policy combo when issuing an orphan endorsement and specify a retired policy external to AIM+. Also, when issuing an orphan endorsement, users are able to continue selecting a current policy combo.

New Parent Policy

When adding a new orphan endorsement for a new parent policy, you have the option to select to search for a Decertified or Active retired policy combo. Selecting Active displays all active and available regular policy combos in the Policy drop-down selection list.
Selecting *Decertified* displays retired policy combos with no associated documents in the **Policy** drop-down selection list.

**Note**

If you notice that a policy combo is not displayed in the selection list, and should be, please contact the Customer Care Center for assistance with having it added.
**Same Parent Policy**

When adding a new orphan endorsement for the same parent policy, you must select the Endorsement on the file you want to work with, click the **Orphan Endorsement** icon and then **Continue**.

**Note**

Notice selecting this option does not display the **Decertified** and **Active** options; these are hidden.
View Only Fields

Two new view only fields have been added to represent the County and the State associated with the policy transmittal; this information is pulled from the Policy Report.

Tool Tips

Two new tool tips have been added to state-specific fields: Parish\Rate Code and Agent Parish Code on the Policy screen; hover your mouse over these fields to display additional text.
File Search

Search by Party Contacts

A new Include Contacts check box has been added to File Search. Select this option to search for a file by contact, party or contact party name.
Management Reports

The following changes have been made in Management Reports.

Policy Reports

Agent ID can now be selected to display as part of the header of the Policy Transmittal Report.
Policy Transmittals

Manual Policy Transmittal
You can now select to manually transmit a single or multiple policies to Excel and then email as a report to Policy Services.
Complete these steps to manually transmit a policy.

Steps
1. From the Policy Transmittal screen, select the Manual Transmittal Folder radio button.
2. Click the Browse for Folder icon to search for a folder to transmit the policy to.
3. When finished, click Search to continue.
4. Select the policy or policies to transmit.
5. With the policy or policies selected, click Transmit to view data in Excel.

Note
The URL option is disabled for non-SISCO Underwriters.
Export One File
If needed, you can also export a single file using a file number and then manually transmit the policy. Complete these steps to export a single file and manually transmit the policy.

**Steps**
1. From the Policy Transmittal screen, select the **Manual Transmittal Folder** radio button.
2. In the Only policies for File Number field, type the policy number you want to export.
3. When finished, click **Search** to continue.

4. Select the policy to transmit.
5. Click **Transmit** to view data in Excel.
Main Revenue Report

The following improvements have been made to the Main Revenue Report:

- The report is now itemized; subsequent income reporting is now separate from the original revenue and reported by the Subsequent Revenue date.
- The Date column now displays the Close date for original revenue, as well as, the subsequent income date for subsequent income.
- The report can now be filtered and generated by branch, based on branch permissions.
Revenue Reporter

BDO Shadow Credit

Improvements have been made to the BDO Shadow Credit. The first BDO (Business Development Officer) on a file is now automatically assigned 100% credit; this flows to the Credit Distribution screen, through to the Revenue Reporting process and automatically gives the BDO 100% Shadow Credit unless adjusted. If needed, the % can be edited.

Subsequent Income Reporting Display

Subsequent Income Reporting is now the same as original Income Reporting, allowing reporting on all fields and including all auto-calculated formulas. A new tab has been created to support these changes. *Subsequent Income* is now displayed on the main report on a separate row and now by the *Subsequent Income Date*. All related revenue reports have been updated to reflect this change.
Management Reports Console

Communication Data
AIM+ now exposes Order Party Contact Communication Data to the AIM+ Management Reports Console.

Contact Associations
AIM+ now exposes Customer/Customer Contact Associations from Setup to the AIM+ Management Console.
Defects

The following defects were addressed in AIM+ 5.0:

Policies
- Auto-pull endorsements from Closing will auto-select transaction codes.

Closing
- When users auto-pull endorsements from Closing to the Policies screen, the default Transaction Codes were not automatically applied. This has been corrected.
- When inserting a line, zero values are now visible on Good Faith Estimate columns on page 3 of HUD 1 2010 and HUD 1A 2010. This has been corrected.

Documents
- After creating a Policy in the Policies module, the Policy Documents were not available on the Document screen. This has been corrected.
- Selecting to right-click to copy a Boilerplate now copies and pastes into the Boilerplate.

Disbursements
- Do not allow Fee Transfers if the FT Party is not active.

File Notes
- On File Notes the Created By field was not consistently displaying the username. At times the login name appeared. This has been corrected.

File Tracking
- Order Date and Closing Date in File Tracking were one day off when time zone was set to (UTC-0:800) Pacific Time. This has been corrected.

Copy Files
- When copying files, Primary Party copies for all Parties. This has been corrected.

Parties
- When a Fee Transfer Party is inactive, you will not be allowed to create a Fee Transfer on the Disbursement Worksheet for the inactive party.

Master Projects
- Users are now able to remove POC By on a Master Fee line.
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 Stewart Workplace or Title Workplace, contact Customer Care at 1.877.800.3132 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 [CustomerCareCenter@stewart.com](mailto:CustomerCareCenter@stewart.com).