AIM+® 8.4

Release Notes

April 19, 2020

For TitleWorkPlace (Agency) Users Only

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AIM+ 8.4 Release Notes

AIM+ 8.4 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: April 19, 2020

Setup

Editing Policy Property Type Default Value in Custom Layout

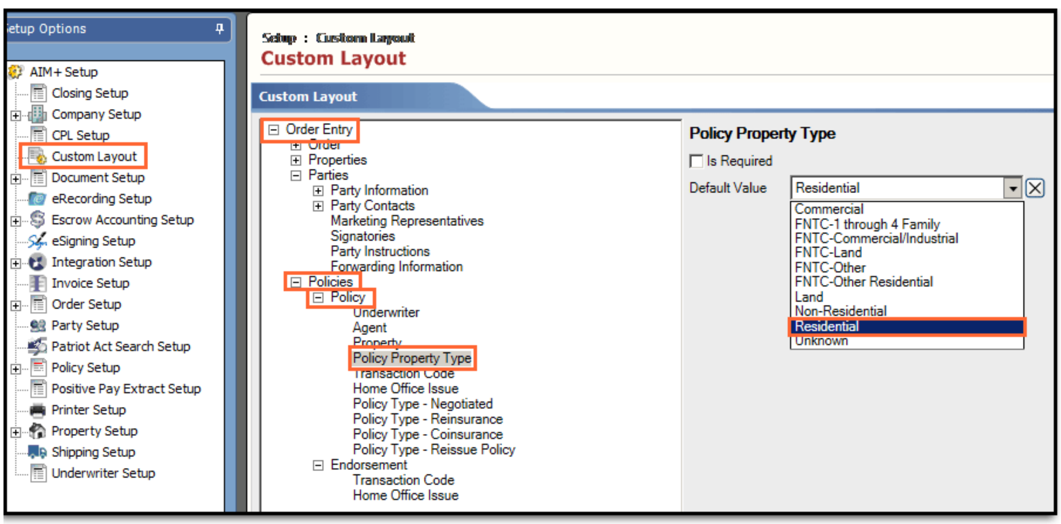
The **CPL Property Type** displays on the *CPL* screen, and the default value is set in *AIM+ Setup*. Follow the steps below to change the Policy Property Type default Value.

Note: You must have access to **AIM+ Setup** to change the Policy Property Type.

Steps

1. From *Setup*, click the **Custom Layout**. The *Custom Layout* screen displays.
2. From the *Custom Layout* screen, click to expand **Order Entry**.
3. Click to expand **Policies**.
4. Click to expand **Policy**, and select **Policy Property Type**.
5. Use the **Policy Property Type** drop-down to select Commercial or Residential.

Note: Commercial or **Residential** must be selected for a default value to appear on the *CPL* screen.



Stewart Access Integration - CPL

This release of AIM+ includes several time-saving enhancements to the *CPL* screen for Stewart Access-issued CPL's.

Enhancements to the CPL Screen

The Stewart Access integration with AIM+ 8.4 provides you with several time-saving enhancements to the *CPL* screen.

Issue CPLs After Issuing a Policy

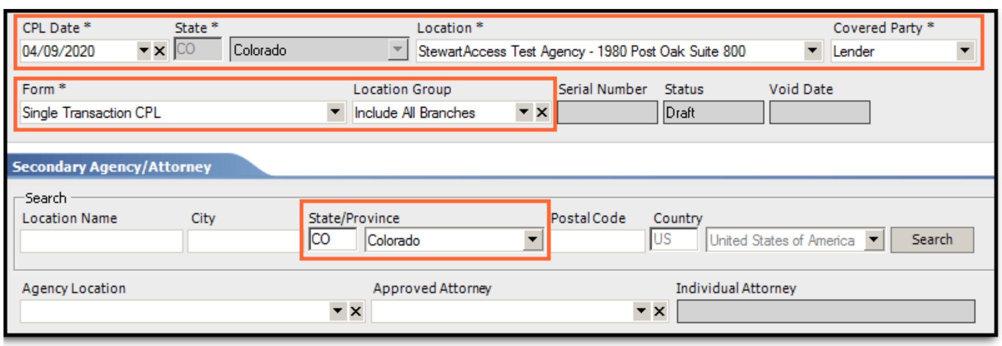
You can now issue a CPL after issuing a policy on a file. CPL charges now display on the CPL screen if required by the Property Address state.

More Options Display in Multiple Fields of CPL

More fields are auto-selected from Stewart Access into AIM+ CPLs for added convenience and accuracy. You will see this additional data in various drop-down menus across the tabs of the CPL screen.

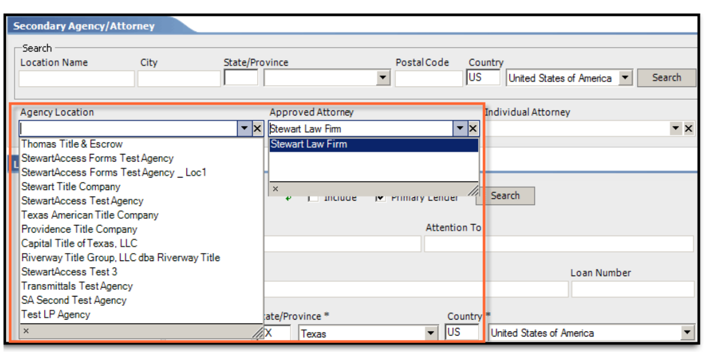
The following fields now auto-selected with data based on information sent from Stewart Access. If only one value is entered, AIM+ will auto-select the remaining fields:

- CPL Date
- State
- Location
- Covered Party
- Form
- Location Group
- State/Province



Additional Fields Auto-Populate

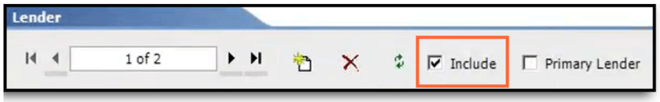
In the previous version of AIM+, if you wanted to add the Agency Location or Approved Attorney to a CPL, you had to provide Search criteria and then make your selection. With AIM+ version 8.4, the **Agency Location** and **Approved Attorney drop-down menus** display the contacts you have most frequently selected and favorites marked against your Stewart Access account.



Party and Property Now Selected by Default

The **Lender** and **Property** are now included by default for Lender CPL's, and accordingly for Buyer/Borrower (Buyer/Borrower, Property) and Seller (Seller, Property) CPL's.

Include checkbox is now selected by default to include the first property listed in the Property Address information on the *CPL* screen and displays in multiple sections of the *CPL* screen: Lender, Buyer/Borrower, Seller, and Property Address Info.

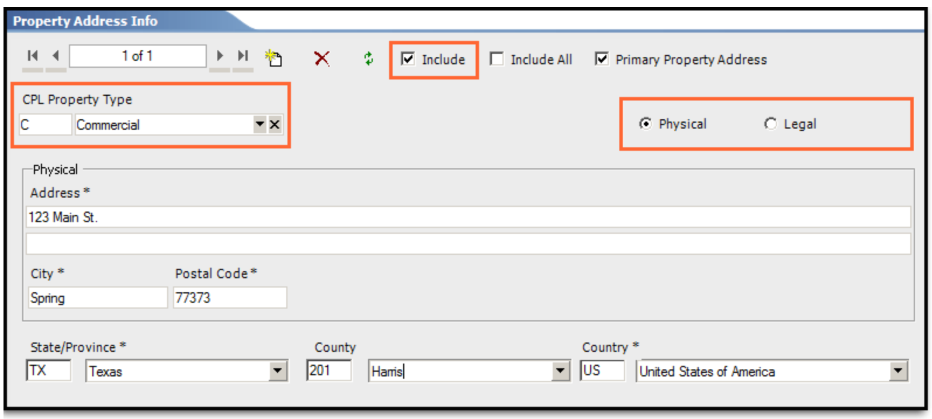


Physical and Legal Address Options

Two new radio buttons have been added to the *CPL* screen in the **Property Address Info** section:

- Physical
- Legal

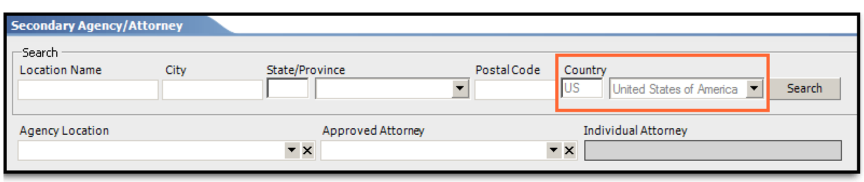
Note: For any property – if you entered data that applies to both physical and legal, the **Physical** (also known as the property address AIM+ screen) radio button is selected by default, because Physical address is priority. If Physical data is not complete, and the system finds data in the *Properties* module (provided as per legal), then **Legal** radio button will be auto-selected.



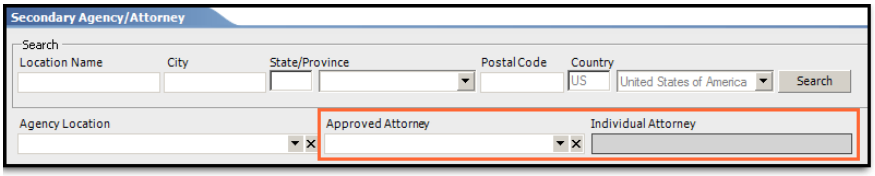
Enhancements to Approved Attorney/Secondary Agency Tab

Several enhancements were made to the **Approved Attorney/Secondary Agency** tab on the *CPL* screen.

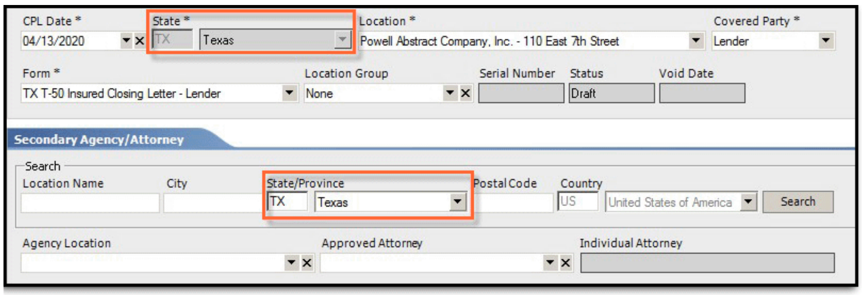
- The **Country** fields are now grayed out, with **US, United States of America** selected by default.



- The **Individual Attorney** field is now grayed out and disabled for all views, including **New, Adjust, Issued** and **Void**. From the **Approved Attorney** drop-down, the **Individual Attorney** name also displays. Make a selection from the Approved Attorney drop-down and the Individual Attorney field auto-populates.



- The **State/Province** fields now display by default according to the **State** selected for the CPL.



Searching for Approved Attorney/Secondary Agency

The **Search** button now allows you to perform a search for **Approved Attorney/Secondary Agency** using partial data.

Note: The minimum requirement to perform a search for **Agency Location** or **Approved Attorney** is the **state/province**. However, you can input data in other search fields to further filter your results.

Steps

1. From *AIM+*, click the **CPL** module. The *CPL* screen displays.
2. From the *CPL* screen, click **New** to create a new CPL.
3. From the new CPL screen, scroll and expand the **Secondary Agency/Attorney** tab.
4. Enter one or more fields such as the Location Name, City, State/Province, or Postal Code. You do not need to enter all fields to perform a search (otherwise known as “partial data”).
5. Click **Search**. Lists of locations and contacts display underneath the **Agency Location** and **Approved Attorney** drop-down menus.
6. Use drop-down menus to view and select the **Agency Location**, **Approved Attorney**, and **Individual Attorney** from a list of locations and contacts based on the search criteria you entered, such as Location Name or Postal Code.

CPL Property Type Options

The **Property Type** drop-down on the *CPL* screen has been renamed to **CPL Property Type**, with two options to select from:

- C – Commercial
- R – Residential

By default, the **CPL Property Type** is selected by default (Residential or Commercial) in *AIM+ Setup*. To change the Policy Property Type, refer to the section, Editing Policy Property Type in Custom Layout for more information.

Selecting Successor Language

Several enhancements were made to Successor Language in this release of AIM+:

- The **Include** checkbox has been removed from the **Lender** tab of the *CPL* screen.
- The **Successor Language** will now be sent to Stewart Access if any entry is selected in drop-down field.
- The **Successor Language** field has been expanded to show more data.

Follow the steps below to select from the new **Successor Language** drop-down menu, or manually type in the **Successor Language**.

Steps

1. From *AIM+*, click the **CPL** module. The *CPL* screen displays.
2. From the *CPL* screen, click **New** to create a new CPL.
3. From the new CPL screen, scroll and expand the **Lender** tab.
4. Use the **Successor Language** drop-down to make your selection or click the **plus** button to enter the Successor Language manually.

Stewart Access Integration - Policies

This release of AIM+ includes several enhancements to the *Policies* screen for Stewart Access-issued policies.

No Longer Required to Save Before Issue

You are no longer required to save a policy draft before issuing that policy.

Relax in Parties Address Information

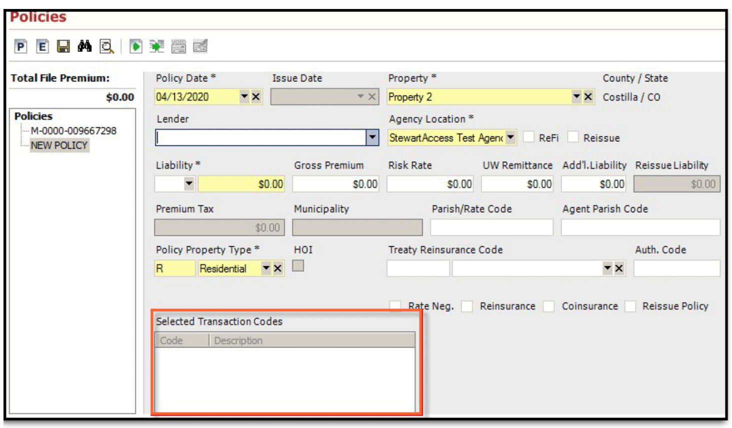
Now you can issue policies by including **Buyer/Borrower** or **Seller** with partial address information for all states, except IN (Indiana).

Important Note: You must have property data on the file in the *Properties* module of the AIM+ file before proceeding to *Policies* in AIM+.

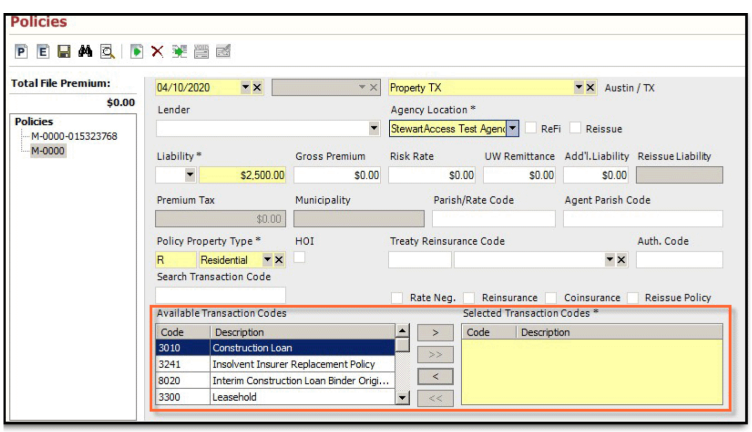
Changes to Transaction Codes

Transaction Codes are **no longer required for Stewart Access policies** in most U.S. states. Transaction Codes are also **not required for any endorsement** (in any state). The system will not require you to select a Transaction Code.

Note: Currently, Stewart Access only requires Transaction Codes for **Texas, New York** and **New Mexico**.



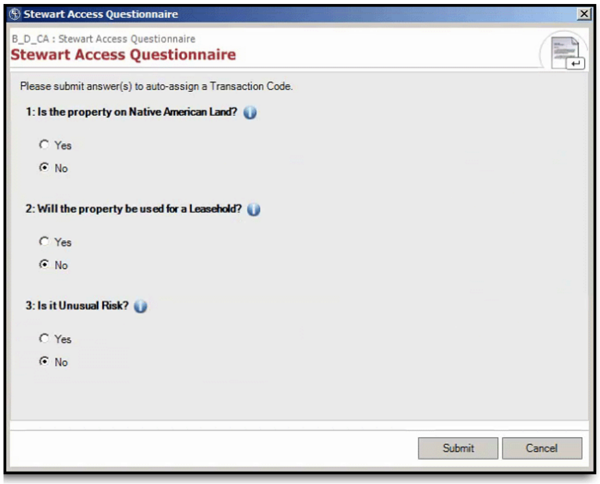
If the property is in a state that requires Transaction Codes, these codes display from Stewart Access into AIM+ and users must select it.



Depending on the state you might be prompted to answer a brief questionnaire to determine Transaction Codes for a policy. The questionnaire only displays for states that do not require a Transaction Code.

Note: The questionnaire may not display, as most of the time the Transaction Code will be auto-assigned.

If the questionnaire displays, the default answers are auto-selected for you.



Auto-Save PPE and Orphan Endorsements

The *Policies* screen now auto-saves any edits to existing Post Policy Endorsements (PPE), or Orphan Endorsements (OE). In addition, you can also manually save your edits to the policy, endorsement, PPE or OE in AIM+ without needing Stewart Access to validate the information.

Deleting Policies and Endorsements from AIM+

The **Delete** button will not display for policies and endorsements that are issued or voided, including PPE and OE.

Municipality Code Auto-Populates

After issuing a policy, the **Municipal Code** now auto-populates on CPL’s for states that require it.

Premium Tax

Premium Tax field is disabled (grayed out) by default for policies and will be auto-enabled for States it is required.

If Premium Tax is not provided, then Stewart Access will auto-calculate and display in AIM+.

Notifications in Yellow for Missing Data

If you attempt to issue a policy and there is missing mandatory data on your file, a yellow message displays at the top of the *Polices* screen to let you know what data is missing and which AIM+ modules to return to.

Defects

The following defects were addressed in **AIM+ 8.4**:

Closing

- The **No. of Pages** field now works as expected after clicking the Calculate button from **Line 1201, Recording Fee for Deed/Mortgage**.
- The system will not validate endorsement data while adjusting a policy.

Additional Information

Accessing AIM+

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.

Tip

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

Need help? Stuck? We're here for you. Should you have any questions, please contact one of the following support teams – representatives are standing by to assist:

- **Direct Ops Users:** Please contact the **Business Support Center** at (855) 330-2800 or customercare@stewart.com.
- **Agency Users:** Please contact the **Agency Support Center** by phone at (844) 835-1200 or by email at customercare@stewart.com.