

AIM+ 9.2

Release Notes
April 8, 2022



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AIM+ 9.2 Release Notes

AIM+ 9.2 includes additional functionality, enhancements, and defect corrections in this release with the PAPI integration. 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 8, 2022

What is PAPI?

The **AIM+** integration with **Pricing API (PAPI)** obtains title insurance rates from Pricing APIs and displays them in **AIM+**. Previously, **AIM+** was getting these rates from **Financial Access Service**. **Pricing API** is a centralized rating service which provides rates for different Title related services and other integrated services such as Ernst.

Most of Stewart applications are now integrated with **Pricing API**. Any new enhancements in Pricing API will be available for all integrated applications going forward.

For this integration, there are no significant changes in user experience except for the few mentioned in this document. These changes are mostly related to AIM+ Setup and the Closing module of **AIM+**. **PAPI** provides rates for the following to **AIM+**:

- Title Insurance Premium
- Endorsements
- Settlement or Closing Fee
- Title Service Fee as lump sum fee

Note: AIM+ has a separate integration with Ernst for Recording Fees; this integration will not affect those calculations.

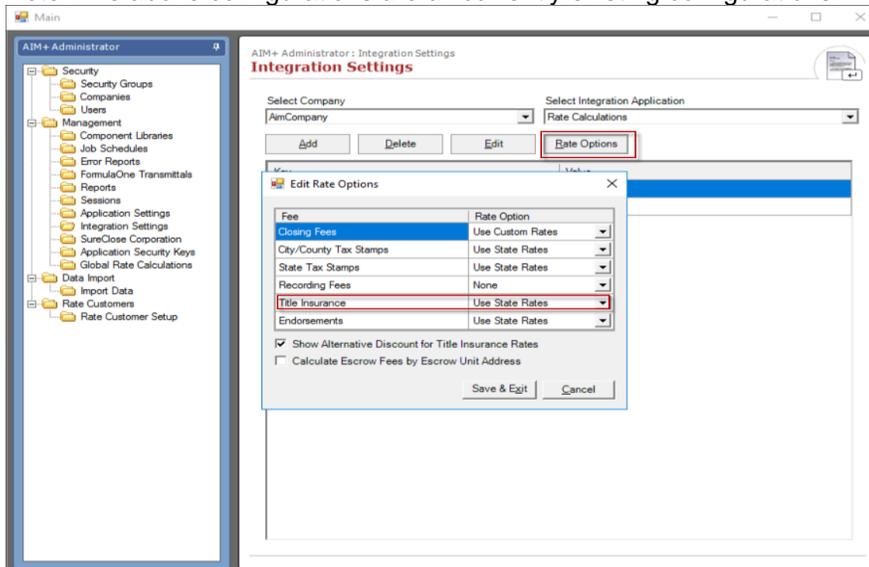
Admin Tool

Custom Rate Calculation based on SiteID

Prerequisites

1. From **Admin Tool** go to *Integration settings*. In Integration Settings, select specific *Company* in “Select Company” dropdown and select *Rate Calculation* in “Select Integration Application” dropdown.
 - In order to get Custom rates from PAPI, make sure correct SiteID is provided if not set already.
2. Click the **Rate Options** button to show the *Edit Rate Options* pop-up. From there, configure the following settings accordingly:
 - For *Premiums*, set **Title Insurance** to Custom Rates
 - For *Endorsement*, set **Endorsements** to Custom Rates
 - For Title Service Fees, only the SiteID is required to get the custom lump sum Title Service Fee.
 - For Closing Fees, settings will not make any impact while getting rates from PAPI. Only the SiteID is required to get Custom Closing Fees from PAPI.

Note: The above configurations are all currently existing configurations.



3. Hit **Calculate** button on Closing lines in AIM+ to get rates from PAPI.

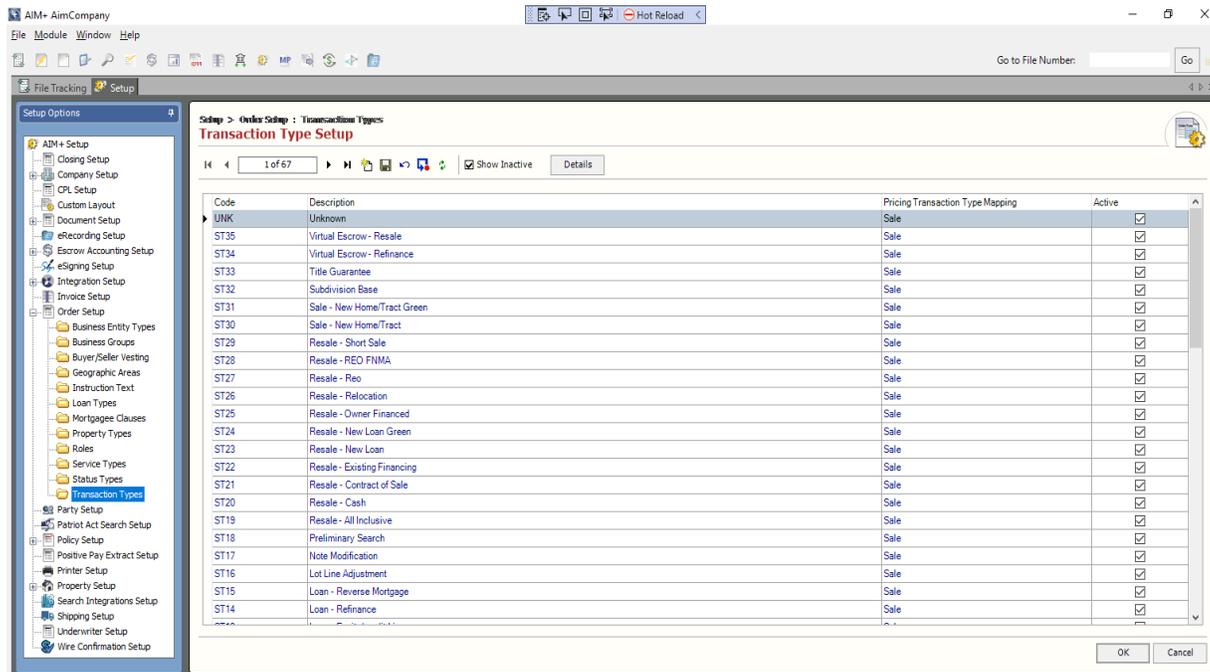
AIM+ Setup

New! Transaction Type Mapping with PAPI

In AIM+ Setup, under Order Setup/Transaction Types, the **AIM+ Transaction Type** can be mapped with the **PAPI** transaction type. A *Pricing Transaction Type Mapping* column will now be added after the *Description* column. This column will display the mapping between *AIM+ Transaction Type* and *PAPI Transaction Type*.

Users can provide this mapping while creating new custom AIM+ Transaction Type by hitting new button from toolbar.

Users can also change this mapping while editing shipped or custom AIM+ Transaction Types by selecting *Transaction Type* from the grid and hitting the “Details” button.



Transaction Type:

Transaction Type Details

Code: Description: Active

Pricing Mapping: Sale Refinance

Save & Exit Cancel

Editing Transaction Type:

Code	Description	Active
UNK	Unknown	<input checked="" type="checkbox"/>

Pricing Mapping

Sale Refinance

Save & Exit Cancel

PAPI Transaction Type Mapping for Company

Shipped and custom transaction types will now be mapped for all companies according to business provided mappings through a database script.

If mapping is not provided against specific AIM+ Transaction Types, PAPI Transaction Types will be mapped by default to *Sale*. The user has the option to change this from AIM+ setup as specified above.

Title Service Fees

You can get the lump sum **Title Service Fee** related to pricing rates from **PAPI** for 1101 line against **HUD1-2010** and **HUD1A-2010**.

Steps

1. Login to **Citrix**.
2. Open the **AIM+** File.
3. Provide the required data for closing.
4. Go to *Closing* and select the **Settlement statement**.
5. Open the *1101 line* and hit **Calculate** to get the *Title Service Fee* lump sum Line Amount from PAPI.

Title Services - Line 1101

Closing (FileSimOwnerPAPI) : Title Services
Title Services

1 of 1 Jump

Line Number
1101-1

Line Amount
\$1,101.00

Payee Code Payee Name
 <<Settlement Agent>> Show HUD Payee

POC Amount POC By POC on Behalf of Borrower
 \$0.00

HUD Line Description Additional HUD Line Description Closing Statement Description
 Title services and lender's title insurance Title services and lender's title insurance to <<

HUD Line Preview

1101. Title services and lender's title insurance to <<Settlement Agent>>	(from GFE #4)	\$1,101.00
1102. Settlement or closing fee		
1103. Owner's title insurance	(from GFE #5)	
1104. Lender's title insurance		
1105. Lender's title policy limit		
1106. Owner's title policy limit		
1107. Agents portion of the total title insurance premium		
1108. Underwriter's portion of the total title insurance premium		
1109.		
1110. Line 1110, SF31110		
1111. Line 1111, SF		
1112. Line 1112, SF		
1113. SLTI		
1114. Line 1114, SF		
1115. Line 1115, SF		
1116. Line 1116, Misc Charge \$56		

Previous Next Save & Exit Cancel

Settlement or Closing Fee

You can get **Closing** or **Settlement** related price rates from **PAPI** for the following closing lines and settlement statements:

Closing Lines

- 1101
- 1102
- 11012
- 11013
- 1108

Settlement Statements

- Closing Disclosure (CD)
- Closing Statement (CS)
- HUD-1
- HUD-1A
- HUD1-2010
- HUD1-2010A

Steps

1. Login to **Citrix**.
2. Open the **AIM+** File.
3. Provide the required data for closing.
4. Go to *Closing* and select the **Settlement statement**.
5. Open the relevant closing line and hit **Calculate** to get the *Settlement or Closing Fee* Line Amount from PAPI.

Settlement or Closing Fee - Line 1109

Closing (FileSimOwnerPAPI) : Settlement or Closing Fee

Settlement or Closing Fee

1 of 1 | Jump

Line Number: 1109-1 | Screen Type: Settlement or Closing Fee

Fee Based On: \$100,000.00

Calculate Sales Tax

Line Amount: \$0.00 | Include in HUD Line 1101 | Itemize on Page 3

Buyer Amount: \$0.00 | Seller Amount: \$0.00

Payee Code: | Payee Name: <<Settlement Agent>> | Show HUD Payee

POC Amount: \$0.00 | POC By: | POC on Behalf of Borrower

HUD Line Description * | Closing Statement Description: to <<Settlement Agent>>

HUD Line Preview			
1101. Title services and lender's title insurance	(from OFE #4)		
1102. Settlement or closing fee			
1103. Owner's title insurance	(from OFE #5)		
1104. Lender's title insurance			
1105. Lender's title policy limit			
1106. Owner's title policy limit			
1107. Agent's portion of the total title insurance premium			
1108. Underwriter's portion of the total title insurance premium			
1109. to <<Settlement Agent>>			
1110.			
1111. Line 1111			

Previous | Next | Save & Exit | Cancel

Title Insurance Premium

You can also get related **Title Insurance Premium** price rates from **PAPI** for the following closing lines and settlement statements:

Closing Lines

- 1103
- 1104
- 1109
- 1110

Settlement Statements

- Closing Disclosure (CD)
- Closing Statement (CS)
- HUD-1
- HUD-1A
- HUD1-2010
- HUD1-2010A

Steps

1. Login to **Citrix**.
2. Open the **AIM+** File.
3. Provide the required data for closing.
4. Go to *Closing* and select the **Settlement statement**.
5. Open relevant closing line and select *Rate Based On*. Hit **Calculate** to get the *Title Insurance Premium* rates from PAPI.

Closing(FileSimOwnerPAPI): Closing Costs
Title Insurance

Total Premium \$2,357.50

Line Number 1108 Rate Based On Simultaneous Lender's

Line 1109 - Lender's Policy | Line 1110 - Owner's Policy

1 of 1

Line Number 1109-1 Underwriter Stewart Title Guaranty Company Agent Policy Coverage Type Basic Policy

Loan Amount \$50,000.00 Form Name Policy

Liability Amount \$50,000.00 Additional Liability \$0.00 Endorsement Liability \$0.00 Total Liability \$50,000.00 Years 0 Alternative Discount

[Show Prior Policy Discount Calculation](#)

Lender Premium Amounts

Disclosure Premium	Disclosure Buyer Amount	Disclosure Seller Amount	<input type="checkbox"/> Show Disclosure Premium on Settlement Statements
\$257.50	\$257.50	\$0.00	
Premium	Premium Buyer Amount	Premium Seller Amount	Risk Rate
\$75.00	\$75.00	\$0.00	\$0.00
Endorsement Premium	Endorsement Buyer Amount	Endorsement Seller Amount	Endorsement Risk Rate
\$0.00	\$0.00	\$0.00	\$0.00
Total Disclosure Premium	Total Disclosure Buyer Amount	Total Disclosure Seller Amount	Endorsements
\$257.50	\$257.50	\$0.00	
Total Premium	Total Premium Buyer Amount	Total Premium Seller Amount	Enter a Title Insurance Premium Adjustment on line 238 in Section L. Adjustments and on line 538 in Section N. Due from Seller at Closing.
\$75.00	\$75.00	\$0.00	

Save & Exit Cancel

Alternative Discount

The *Alternative Discount* feature is not available in PAPI and will no longer function in AIM+. Please note that this feature is not in place for many companies and can be turned off by unselected the below highlighted option in Edit Rate Option popup.

AIM+ Administrator

- Security
 - Security Groups
 - Companies
 - Users
- Management
 - Component Libraries
 - Job Schedules
 - Error Reports
 - FormulaOne Transmittals
 - Reports
 - Sessions
 - Application Settings
 - Integration Settings
 - SureClose Corporation
 - Application Security Keys
 - Global Rate Calculations
- Data Import
 - Import Data
- Rate Customers
 - Rate Customer Setup

AIM+ Administrator : Integration Settings

Integration Settings

Select Company: AimCompany | Select Integration Application: Rate Calculations

Add | Delete | Edit | Rate Options

Edit Rate Options

Fee	Rate Option
Closing Fees	Use Custom Rates
City/County Tax Stamps	Use State Rates
State Tax Stamps	Use State Rates
Recording Fees	None
Title Insurance	Use Custom Rates
Endorsements	Use Custom Rates

Show Alternative Discount for Title Insurance Rates
 Calculate Escrow Fees by Escrow Unit Address

Save & Exit | Cancel

Endorsement

You can also get Endorsement price rates from **PAPI** from the closing lines related to **Title Insurance Premium**

Steps

1. Open Title Insurance Premium related closing line, click the **Endorsements** button to open the Endorsements Pop-up.
2. Hit **Calculate** to get the *Endorsements* rates from PAPI

Closing (FileSimOwnerPAPI) : Title Insurance > Lender Endorsements

Lender Endorsements

Multiple Endorsements

Select All Underwriter Amount Liability Risk Rate Format Endorsement Name

Endorsement	Premium	Buyer Amount	Seller Amount	Underwriter %
T30 Tax Deletion TLTA E-123	\$0.00	\$0.00	\$0.00	20.00
T36 EPL TLTA E-1111	\$0.00	\$0.00	\$0.00	20.00
T19 1 REM OP STG E-5955	\$0.00	\$0.00	\$0.00	20.00
Not Payable Taxes Charge only	\$0.00	\$0.00	\$0.00	20.00
*				
Total:	\$0.00	\$0.00	\$0.00	

Display Endorsements on HUD & Closing Statements

Include in Policy Premium Itemize Total

Preview Print Save & Exit Cancel

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.