

AIM+ 9.3.1

Release Notes
June 24, 2022



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AIM+ 9.3.1 Release Notes

AIM+ 9.3.1 includes additional functionality, enhancements, and defect corrections in this release. 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: June 24, 2022

New! Linking and Unlinking Policies with CPL Charges

Now CPL Charges will be link with policy whenever a policy is being issued/transmitted. Previously, CPL Charges would only be linked with **AIM+ File**.

If the issued/transmitted policy gets voided, CPL Charges will be relinked with another issued policy. CPL Charges which are transmitted with policy will be marked as transmitted in **AIM+** system and they will not appear again on reporting. Only new CPL charges associated with non-transmitted policy will appear.

By doing this, CPL Charges will no longer appear with the voided policy. CPL charges which are marked transmitted will not appear on reports. If transmitted policy is adjusted, CPL Charges will only link with original policy not the adjusted record of the policy.

If all policies on the **AIM+** file are voided, CPL charges will be removed from the **AIM+ File**. At this point, if any policy will be issued, all CPL Charges will be received back from **Stewart Access** and follow the cycle as previously mentioned.

The sequence of relinking CPL charges with next issue policy will be according to order in which Policy has been created on file.

There is no change on policy screen for this feature.

New! Policy Register Report Changes

The previously mentioned CPL Charges linking with Policy will be reflected on **Policy Register Report** as well. In the *Original Policy Number* column for CPL records, Policy number will be displayed with whom CPL charges are linked now.

Policy Register Report - Detail																	Page 1	
AIM SA Test																		
All Branches																		
Group By : RT_KY_1																		
File Number	Trans. Type	Policy Number	Original Policy Number	County Code	State	Policy Date	Liability	Additional Liability	Reissue Liability	Gross Premium	Risk Rate	Underwriter Remittance	Premium Tax	TIEFF	Trans. Codes	Prop. Type	Auth. Codes	HOI
RT_KY_1	New	M-0000-7 29267578		19	KY	05-19-2022	15,000.00	0.00	0.00	1,500.00	0.00	180.00	0.00	0.00	201	R		N
RT_KY_1	CPL	72933517 8	M-0000-7 29267578				0.00	0.00	0.00	23.56	0.00	14.56	9.65	0.00	660			
Number of Records: 2							15,000.00	0.00	0.00	1,523.56	0.00	194.56	9.65	0.00				
Group By : RT_CO_3																		
File Number	Trans. Type	Policy Number	Original Policy Number	County Code	State	Policy Date	Liability	Additional Liability	Reissue Liability	Gross Premium	Risk Rate	Underwriter Remittance	Premium Tax	TIEFF	Trans. Codes	Prop. Type	Auth. Codes	HOI
RT_CO_3	Void	M-0000-7 29350558		15	CO	05-19-2022	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00				N
RT_CO_3	New	M-0000-7 29358578		15	CO	05-19-2022	14,500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	201	R		N
RT_CO_3	CPL	72934984 9	M-0000-7 29358578				0.00	0.00	0.00	25.00	0.00	25.00	0.00	0.00	660			
RT_CO_3	New	M-0000-7 29358748		15	CO	05-19-2022	15,600.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	201	R		N
Number of Records: 4							30,100.00	0.00	0.00	25.00	0.00	25.00	0.00	0.00				
Group By : RT_CO_2																		
File Number	Trans. Type	Policy Number	Original Policy Number	County Code	State	Policy Date	Liability	Additional Liability	Reissue Liability	Gross Premium	Risk Rate	Underwriter Remittance	Premium Tax	TIEFF	Trans. Codes	Prop. Type	Auth. Codes	HOI
RT_CO_2	New	M-0000-7 29282338		15	CO	05-19-2022	14,500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	201	R		N
RT_CO_2	CPL	72929578 7	M-0000-7 29282338				0.00	0.00	0.00	25.00	0.00	25.00	0.00	0.00	660			

Pre & Post Transmittal Grid and Report Changes

In conjunction with the CPL changes previously listed, further corresponding CPL charges will display in Pre & Post Policy Transmittal search screen and reports.

The screenshot shows the 'Policy Transmittal' search interface. The search criteria include: Underwriter * STGC, Agent * 060062, From Date * 05/19/2022, Through Date * 05/20/2022, and E-mail Status To rehan.tasaddaq@stewart.com. The search results show 3 records found, with the following data:

Agent	File Number	Transaction Type	Policy Number	Original Policy Number	County	State	Policy Date	Liability	Additional Liability	Reissue Liability	Gross Premium	Risk Rate	Underwriter Remittance	Premium Tax	TIEFF	Transaction Codes
060062	RT_CO_3	New	M-0000-729358578	M-0000-729358578	15	CO	05/19/20...	\$14,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00 201
060062	RT_CO_3	CPL	729349849	M-0000-729358578				\$0.00	\$0.00	\$0.00	\$25.00	\$0.00	\$25.00	\$0.00	\$0.00	\$0.00 660
060062	RT_CO_3	New	M-0000-729358748		15	CO	05/19/20...	\$15,600.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00 201

Pre & Post Transmittal Report

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PRE-TRANSMITTAL - Policy Register Report - Detail

AIM SA Test
All Branches
Agent(s): 060062

Agent: 060062

File Number	Trans. Type	Policy Number	Original Policy Number	County	State	Policy Date	Liability	Additional Liability	Reissue Liability	Gross Premium	Risk Rate	UW Remittance	Premium Tax	TIEFF	Trans. Codes	Prop. Type	Auth. Codes	HOI
RT_CO_3	New	M-0000-729358578		15	CO	5/19/2022	14,500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	201	R		N
RT_CO_3	CPL	729349849	M-0000-729358578				0.00	0.00	0.00	25.00	0.00	25.00	0.00	0.00	660			N
RT_CO_3	New	M-0000-729358748		15	CO	5/19/2022	15,600.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	201	R		N
Number of Records: 3							30,100.00	0.00	0.00	25.00	0.00	25.00	0.00	0.00				

Linking CPL Charges with Policies on Historical Data

The script will be executed on all companies which links all CPL charges with issued policy. This script will consider those AIM+ files whose policy issue date fall in between 01/01/2021 until /06/24/2022.

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.