

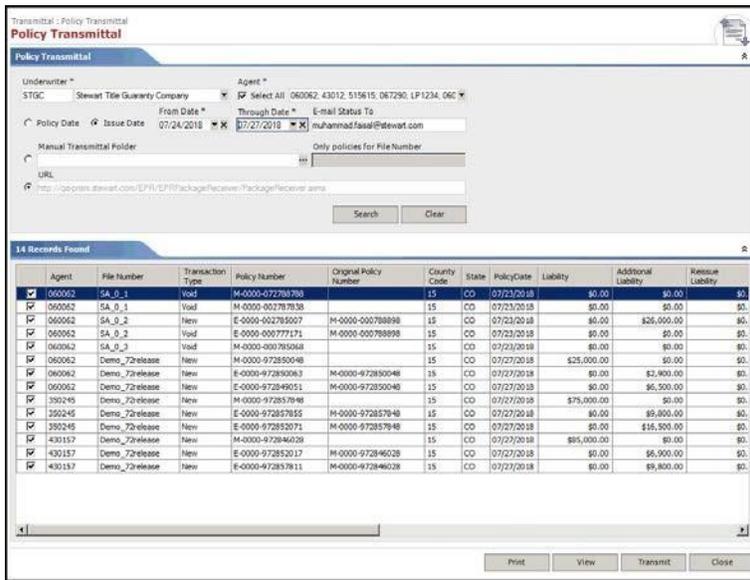
# AIM+ Transmitting Policies

## Reviewing Policy Records

Prior to transmitting policies, you can search for and review the policy records. Additionally, you can preview or print the *Pre-Transmittal Policy Register Report* to review the policy and endorsement records. The *Pre-Transmittal Policy Register Report* includes the policies and endorsements for the selected underwriter and agent within the selected date range.

### Steps

1. From the Module menu, click **Policy Transmittal**.
2. On the **Policy Transmittal** tab, enter the information that is common to all the policies and endorsements you want to search for and transmit:
  - **Underwriter**—Defaults to the underwriter set up for your company, if only one is available. If two or more underwriters are available, select the underwriter to which you are transmitting.
  - **Agent**—Defaults to the agent ID set up for the selected underwriter, if only one is available. If two or more agent IDs is available, select one or more check boxes for which you are transmitting the policy.
  - **From Issue Date**—Type or select the beginning date for the policies you want to transmit.
  - **Through Issue Date**—Type or select the through date for the policies you want to transmit.



The screenshot shows the 'Policy Transmittal' search interface. The search criteria are: Underwriter: STGC (Stewart Title Guaranty Company), Agent: muhammad.faisal@stewart.com, From Date: 07/24/2018, Through Date: 07/27/2018. The search results table is as follows:

Agent	File Number	Transaction Type	Policy Number	Original Policy Number	County Code	State	Policy Date	Liability	Additional Liability	Reserve Liability
060062	SA_0_1	Void	M-0000-07228788		15	CO	07/23/2018	\$0.00	\$0.00	\$0.
060062	SA_0_1	Void	M-0000-00787838		15	CO	07/23/2018	\$0.00	\$0.00	\$0.
060062	SA_0_2	New	E-0000-002785007	M-0000-000788898	15	CO	07/23/2018	\$0.00	\$26,000.00	\$0.
060062	SA_0_2	Void	E-0000-000777171	M-0000-000788898	15	CO	07/23/2018	\$0.00	\$0.00	\$0.
060062	SA_0_3	Void	M-0000-000785068		15	CO	07/23/2018	\$0.00	\$0.00	\$0.
060062	Demo_72release	New	M-0000-972850048		15	CO	07/27/2018	\$25,000.00	\$0.00	\$0.
060062	Demo_72release	New	E-0000-972850048	M-0000-972850048	15	CO	07/27/2018	\$0.00	\$3,900.00	\$0.
060062	Demo_72release	New	E-0000-972849051	M-0000-972350048	15	CO	07/27/2018	\$0.00	\$6,500.00	\$0.
350245	Demo_72release	New	M-0000-972857848		15	CO	07/27/2018	\$75,000.00	\$0.00	\$0.
350245	Demo_72release	New	E-0000-972857855	M-0000-972857848	15	CO	07/27/2018	\$0.00	\$9,800.00	\$0.
350245	Demo_72release	New	E-0000-972852071	M-0000-972857848	15	CO	07/27/2018	\$0.00	\$16,500.00	\$0.
430157	Demo_72release	New	M-0000-972846028		15	CO	07/27/2018	\$65,000.00	\$0.00	\$0.
430157	Demo_72release	New	E-0000-972852017	M-0000-972846028	15	CO	07/27/2018	\$0.00	\$6,900.00	\$0.
430157	Demo_72release	New	E-0000-972857811	M-0000-972846028	15	CO	07/27/2018	\$0.00	\$9,800.00	\$0.

3. Click **Search**. The policy and endorsement records with an **Issue Date** that falls within the selected date range display.

**Note:** To simplify the search results when you have several policy and endorsement records, select one of the column headings to sort the information in the grid.

4. If you want to preview information for the policy records prior to the transmittal, click **View**. The *Pre-Transmittal Policy Register Report* displays the policies for the selected underwriter and agent within the select date range. If you want to print this report, click **Print**.

## AIM+ Transmitting Policies

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### Transmitting Policies

After reviewing the policy and endorsement records, transmit the policies and endorsements to SISCO underwriters through the Internet or as a text file. Policies for non-SISCO underwriters can be transmitted as a text file.

You can transmit policies to SISCO underwriters through the Internet. Policies and endorsements for non-SISCO underwriters can be transmitted as an e-mail attachment.

**Important!** To transmit policy and endorsement images, you must first publish the policies and endorsements within AIM+ Documents. If policies and endorsements are not published, only the policy data is transmitted. Policy images and Stewart Prior Files data are not transmitted.

### Steps

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2. On the **Policy Transmittal** tab, enter the information that is common to all the policies and endorsements you want to search for and transmit:
  - **Underwriter** – Defaults to the underwriter set up for your company, if only one is available. If two or more underwriters are available, select the underwriter to which you are transmitting.
  - **Agent** – Defaults to the agent ID set up for the selected underwriter, if only one is available. If two or more agent IDs is available, select one or more check boxes for which you are transmitting the policy.
  - **From Issue Date** – Type or select the beginning date for the policies you want to transmit.
  - **Through Issue Date** – Type or select the through date for the policies you want to transmit.

**Note:** Only policies and endorsements with an Issue Date within the selected date range are transmitted.

3. The **E-mail Status To** defaults to the e-mail address of the person logged in, if specified in the account information. If this field is blank or the e-mail address is incorrect, type the e-mail address of the person you want to be notified for status reports during the policy transmittal process.
4. In the **Destination** section, select the option that best describes how you want to transmit policies:
  - **File** – Generates a policy transmittal file in XML format with the policy data. You can e-mail this policy transmittal file to a non-SISCO underwriter. Continue with step 5.
  - **URL** – Displays the pre-defined URL for SISCO underwriters only. Policy data is automatically sent to the SISCO underwriter via the Internet. Continue with step 5.
5. If you selected the **File** option to transmit policy data, click the **Browse** button  to find and select the folder where the XML file will be saved.
6. After you review the selected policies, click **Transmit**.

# AIM+ Transmitting Policies

## Removing Policies from Transmittal

For improved process and accuracy, you can now easily remove one or more policies/endorsements before transmitting a batch of completed policies/endorsements.

From the Policy Transmittal screen, on the Policies grid, unselect the checkboxes for the policies/endorsements you do not want to transmit. Each record is selected by default. This feature also allows you to transmit one or more policies/endorsements at a time, upon

Agent	File Number	Transaction Type	Policy Number	Original Policy Number	County Code	State	PolicyDate	Liability	Additional Liability	Reissue Liability
<input checked="" type="checkbox"/>	060062	UAT_63487	New	M-0000-805760478		15	CO	07/05/2018	\$2,500.00	\$0.00
<input checked="" type="checkbox"/>	060062	63487-7	New	E-0000-805794511	M-0000-805794168	1	CO	07/02/2018	\$0.00	\$122.00
<input checked="" type="checkbox"/>	060062	63487-7	New	M-0000-805794578		1	CO	07/02/2018	\$1,542.00	\$0.00
<input checked="" type="checkbox"/>	060062	63487-7	New	E-0000-805794647	M-0000-805794578	1	CO	07/02/2018	\$0.00	\$120.00
<input checked="" type="checkbox"/>	060062	63487-7	New	E-0000-805794801	M-0000-805794578	1	CO	07/02/2018	\$0.00	\$0.00
<input type="checkbox"/>	060062	UAT_63487	Void	M-0000-805760138		15	CO	06/28/2018	\$0.00	\$0.00
<input type="checkbox"/>	060062	UAT_63487	New	E-0000-805896731	M-0000-805760478	15	CO	07/05/2018	\$0.00	\$0.00
<input checked="" type="checkbox"/>	060062	UAT_63487	New	M-0000-805896798		15	CO	07/05/2018	\$15,000.00	\$0.00
<input checked="" type="checkbox"/>	060062	UAT_63487	New	E-0000-805896805	M-0000-805896798	15	CO	07/05/2018	\$0.00	\$0.00
<input checked="" type="checkbox"/>	060062	UAT_63487	New	E-0000-805904961	M-0000-805896798	15	CO	07/05/2018	\$0.00	\$0.00
<input checked="" type="checkbox"/>	222222	63487-4	New	M-0000-805733008		1	CO	07/02/2018	\$1,211.00	\$0.00
<input checked="" type="checkbox"/>	222222	63487-4	New	M-0000-805733428		1	CO	07/02/2018	\$12.00	\$0.00
<input checked="" type="checkbox"/>	350245	UAT_63487	New	M-0000-805905398		15	CO	07/05/2018	\$19,000.00	\$0.00
<input checked="" type="checkbox"/>	350245	UAT_63487	New	E-0000-805905405	M-0000-805905398	15	CO	07/05/2018	\$0.00	\$750.00
<input checked="" type="checkbox"/>	350245	UAT_63487	New	E-0000-805905406	M-0000-805905398	15	CO	07/05/2018	\$0.00	\$980.00
<input checked="" type="checkbox"/>	350245	UAT_63487	New	E-0000-805905561	M-0000-805905398	15	CO	07/05/2018	\$0.00	\$6,555.00
<input checked="" type="checkbox"/>	350245	UAT_63487	New	M-0000-805905628		15	CO	07/05/2018	\$78,000.00	\$0.00
<input checked="" type="checkbox"/>	350245	UAT_63487	New	E-0000-805905697	M-0000-805905628	15	CO	07/05/2018	\$0.00	\$25,000.00



Remember, when Stewart is your underwriter in AIM, your policy register data is automatically transmitted via Stewart Access while policy images are transmitted via the policy transmittal feature. The process for transmitting a policy or endorsement in AIM+ has not changed. The only change is the ability to remove specific policies and endorsements from transmitting.

If you have unselected a Policy, the Endorsements associated with that policy will be unselected automatically but can be checked again manually.

A separate transmittal job will be created for each agent that appeared in policies grid after search.