Create Policy

To Create a Policy within AIM+, use the following steps:

**Steps**

1. Click the **Policies** Data Entry Group.
2. Many of the fields are unchanged. Additional fields are illustrated.

![Policy creation interface](image)

**Please Note:** The Issue date will not appear until the Policy is Issued.

3. Enter the **Lender**.
4. Enter the **Agency Location**.
5. If preparing a Refi or Reissue policy, click Refi or Reissue. Enter the required fields marked with asterisks.

![Policy creation interface](image)

**Note:** Do not forget to enter the Transaction Codes appropriate for your policy or endorsement.

6. Enter the remainder of the fields as you normally would.
7. Click **Save**. The Serial Number is provided by Stewart Access. The Serial Number is masked until the policy is issued.

8. Click **Issue** to issue the policy.

9. The Serial Number is unmasked and the Issue Date is populated with today’s date. All other fields are dimmed and cannot be edited.

**Note:** You may work on the Policy in Documents while it is in Draft mode.

**Note:** Stewart Access provides Serial Numbers, therefore there is no need to import and maintain inventory.
To edit any other information on the Policy screen, you must Void the jacket, make desired changes and reissue.

**Note:** Some fields may be Revised by selecting the Revise icon. Those fields are shown below.

<table>
<thead>
<tr>
<th>Liability *</th>
<th>Gross Premium *</th>
<th>Risk Rate</th>
<th>UW Remittance</th>
<th>Add'L Liability</th>
<th>Reissue Liability</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$250,000.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Premium Tax</th>
<th>Municipality</th>
<th>Parish/Rate Code</th>
<th>Agent Parish Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Policy Property Type</th>
<th>H0I</th>
<th>Treaty Reinsurance Code</th>
<th>Auth. Code</th>
<th>Transaction Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>R Residential</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If you Revised your jacket information, click Issue to “re-issue” the Policy Jacket.

10. Print the Jacket from the Documents data entry group as usual.