

SOFTPRO SELECT

March 2022
RELEASE NOTES



Testing Release Date: March 3, 2022
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ALL STATES/SITES

DOCUMENTS

Escrow

<i>Real Estate Excise Tax Affidavit (Commercial)</i>			
New/Mod Change	Requested By WA	Incident No.	TFS No. 700930
Updated to reflect most recent version.			
Affected item(s): Real Estate Excise Tax Affidavit (Commercial)			

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Escrow/Title

<i>Corp./Consolidated Invoice</i>			
New/Mod Change	Requested By KC Ops	Incident No.	TFS No. 697608
1. Adding new option to include the project name field in the property section of the invoice.			
2. For TG HW Ops, adding the accounts receivable email address to show the with remit to contact.			
Affected item(s): Consolidated Invoice Corporate Invoice HTML Invoices Programming Notes			

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REPORTS

Batch Stale Dated Check Letter			
New/Mod Change	Requested By DSG Ops	Incident No.	TFS No. 696344
Updating format of stale dated check letter and due diligence - all others formats to assist with new automated letter mailing			
Affected item(s): Batch Stale Dated Check Letter			

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Commitment/Policy Status			
New/Mod Change	Requested By FNF Implementation Team	Incident No.	TFS No. 697969
Adding product type to the Excel export			
Affected item(s): Commitment/Policy Status			

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EPU Task Summary/Productivity by County Manager			
New/Mod Change	Requested By CO EPU	Incident No.	TFS No. 692823
Adding an option to insert a group above the county manager for flashcode.			
Affected item(s): EPU Task Summary/Productivity by County Manager			

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Master Commitment (HTML)			
New/Mod Change	Requested By FNF Corp. Team	Incident No.	TFS No. 695467
Updating the president signature from Randy Quick to Michael Nolan			
Affected item(s): Commitment for Title Insurance 2016 (NM 6) (Non-Editable) Master Commitment (HTML) Master Commitment (Non-Editable)			

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New/Updated Lookup Codes			
New/Mod Change	Requested By FNF Config Team	Incident No.	TFS No. 693425
Adding an option to show the most recent note on the contact and/or person that is shown on the report.			
Affected item(s): New/Updated Lookup Codes			

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New/Updated Lookup Codes			
New/Mod Change	Requested By FT CO Ops	Incident No.	TFS No. 696291
Adding the other contact type to show after the contact type description in paratheses			
Affected item(s): New/Updated Lookup Codes			

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Order Tasks by Order Date			
New/Mod Change	Requested By	Incident No.	TFS No.
	TX Escrow Admin		692802
Adding picklist for sales rep			
Affected item(s): Order Tasks by Order Date			

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Order Tasks by Task Dates			
New/Mod Change	Requested By	Incident No.	TFS No.
	TX Escrow Admin		692800
Adding picklist for sales rep			
Affected item(s): Order Tasks by Task Dates			

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Orders by Settlement Date			
New/Mod Change	Requested By	Incident No.	TFS No.
	FNF Support		699323
Adding option to run the report by title officer/examiner			
Affected item(s): Orders by Settlement Date			

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Start inHere DOP Orders			
New/Mod Change	Requested By	Incident No.	TFS No.
	MW IT		695999
Adding two new columns to the Excel export for buyer attorney and sales price			
Affected item(s): Start inHere DOP Orders			

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startSAFE DOP Orders			
New/Mod Change	Requested By	Incident No.	TFS No.
	MW IT\Liberty Title		700206
<ol style="list-style-type: none"> Updating PDF version to show branch lookup code dash branch nickname when grouped by branch Adding new columns for contact code and contact name that will populate if the contact name from the order matches the contact name from the 360 transaction. 			
Affected item(s): startSAFE DOP Orders			

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Template Log			
New/Mod Change	Requested By	Incident No.	TFS No.
	FNF Config Team		697971
Adding new text box search for the additional title charges description			
Affected item(s): Template Log			

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Transaction Activity			
New/Mod Change	Requested By FT CO Ops	Incident No.	TFS No. 695331
Adding an option to include the memo line of the transaction			
Affected item(s): Transaction Activity			

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ARIZONA

MY SCREENS

<i>Title/Escrow Charges Screen</i>			
New/Mod Mod	Requested By Rates Team	Incident No.	TFS No.

The **Title/Escrow Charges*** screen has been modified to include the **Rate Summary Responses** section. This change is visible when one of the following **My Screens** is selected:

- > AZ All Screens
- > AZ Commercial
- > AZ Commercial CSS
- > AZ Escrow
- > AZ Title

*The **Title/Escrow Charges** screen appears in different sections (i.e., Residential Closing, Commercial, Invoicing, etc.) depending upon the **My Screens** selected. This affects all occurrences.

⏪
⏩
Title/Escrow Charges

Order Status: InProcess
Buyer:

Transaction Type: Refinance

Rate Summary Responses

Rate Summary Responses:

Description	Charge	Issued Date	Effective Date	Line	Invoice	Bill Code	Seller %	Policy
+ -								

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CALIFORNIA

DOCUMENTS

Escrow

<i>Confirmation of Time Periods</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	FNT Santa Barbara		697575
Made the acceptance date a prompt.			
Affected item(s): Confirmation of Time Periods			

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<i>MH Certification of Retail Value and Purchase Price (HCD 476.4)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	CA		698867
Added custom fields to account for the width and length in inches.			
Affected item(s): MH Certification of Retail Value and Purchase Price (HCD 476.4)			

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MY SCREENS

Additional Title Charges Screen

New/Mod Mod	Requested By Rates Team	Incident No.	TFS No.
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The **Additional Title Charges*** screen has been modified to include the **Rate Summary Responses** section.

This change is visible when one of the following **My Screens** is selected.:

- › CA – Foreclosure Dept
- › CA – Commercial
- › CA – Commercial CSS
- › Northern CA – All Screens
- › Northern CA – Commercial Screens
- › Northern CA – DSC Screens
- › Northern CA – EPU Screens
- › Northern CA – Escrow Screens
- › Northern CA – FT SAC Commercial 010
- › Northern CA – Policy Screens
- › Northern CA – RLC Screens
- › Northern CA – Title Screens
- › PIRT Title
- › SoCal All Screens
- › SoCal Escrow Screens
- › SoCal Payoff Screens
- › SoCal Policy Screens
- › SoCal Production Screens
- › SoCal Title Screens

*The **Additional Title Charges** screen appears in different sections (i.e., Closing, Commercial, Invoicing, etc.) depending upon the **My Screens** selected. This affects all occurrences.

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Property Screen

New/Mod Mod	Requested By Gina Garcia	Incident No. SCTASK220038987	TFS No.
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The following fields have been added to the **Property** screen to accommodate an update to the **MH Certification of Retail Value and Purchase (HCD 476.4)** document (DOC_SCA0000172).

- > **Width (Inches)**
- > **Length (Inches)**

This change is visible when one of the following **My Screens** is selected:

- > **Northern CA – All Screens**
- > **Northern CA – Escrow Screens**

The screenshot shows the 'Property' screen interface. At the top, there are navigation arrows and the title 'Property'. Below this is a section titled 'Properties (1)' containing a table with columns for 'Property Address', 'Site Number/Name', and 'City/State/Zip'. The table has one row with the number '1'. Below the table is a section titled 'Manufactured Housing' which contains several input fields: 'Width (Inches):', 'Length (Inches):', 'Date first sold:', 'Date manufactured:', and 'Enter the year of the manufactured home:'. The 'Width (Inches):' and 'Length (Inches):' fields are circled in red in the original image.

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PHRASE(S)

<i>New EI Phrase (NOCAL)</i>							
New/Mod New	Requested By NoCal	Incident No.	TFS No. 697061				
New phrase:							
<table border="1"> <tr> <td>Code</td> <td>Name</td> </tr> <tr> <td>utl02</td> <td>FINAL PARK UTILITIES</td> </tr> </table> <p>FINAL PARK UTILITIES: The undersigned owner of the above mentioned property hereby certifies that we have paid our park utilities current as of last park billing. We are aware that we will have a final utility hold back held in escrow pursuant to park demand and EO Name will receive a final billing from park after close of escrow which will be paid by escrow from funds held. Any unused portion of Final Park Utility Holdback will be refunded to seller upon receipt of park final demand, not more than forty-five (45) days from close of escrow.</p> <p>The undersigned seller will be responsible for any delinquent utility bills outstanding not disclosed to escrow at time of closing. If EO Name becomes aware of any delinquent amounts due prior to close you are hereby authorized to deduct said amounts from my net proceeds and pay my account current.</p>				Code	Name	utl02	FINAL PARK UTILITIES
Code	Name						
utl02	FINAL PARK UTILITIES						

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COLORADO

MY SCREENS

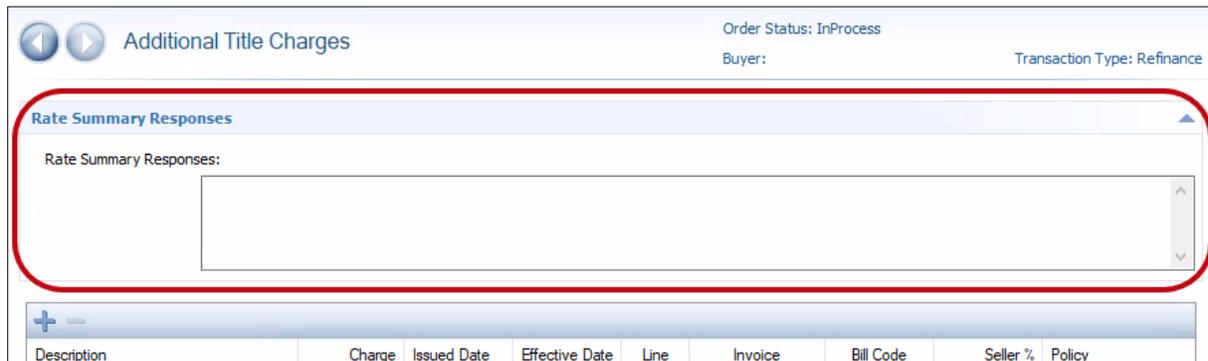
<i>Additional Title Charges Screen</i>			
New/Mod Mod	Requested By Rates Team	Incident No.	TFS No.

The **Additional Title Charges*** screen has been modified to include the **Rate Summary Responses** section.

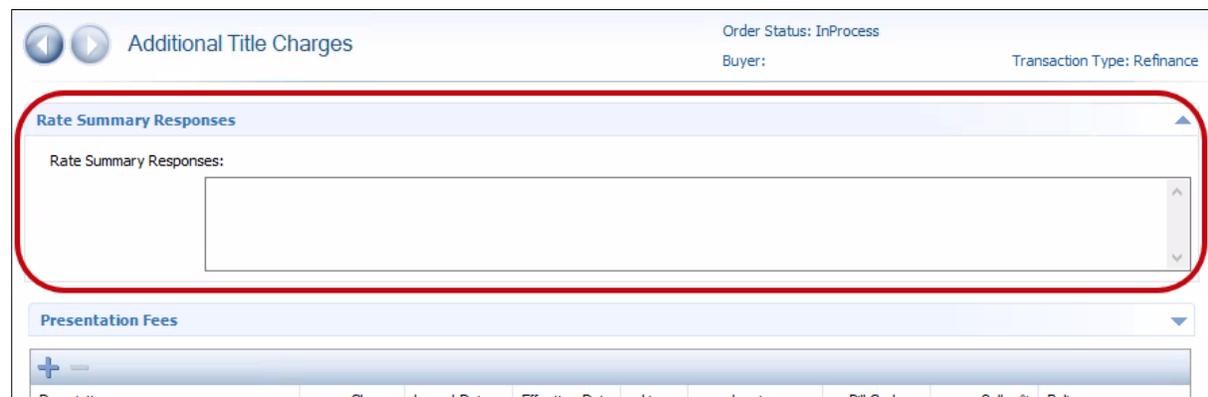
This change is visible when one of the following **My Screens** is selected:

- > CO-Construction Disb
- > CO-Construction Disb-FNT
- > CO-Escrow-FNT
- > CO-Title
- > CO-Title-FNT
- > CO-Title-FNT HT CT CPF

*The **Additional Title Charges** screen appears in different sections (i.e., Sale, Commercial, General, etc.) depending upon the **My Screens** selected. This affects all occurrences.



This change is visible when the **My Screens > CO-Escrow** is selected.



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REPORTS

1099-Misc Exceptions			
New/Mod Change	Requested By CT CO Ops	Incident No.	TFS No. 693137
Updating to show the name short of the contact on the report and to suppress the federal tax filing status type exception			
Affected item(s): 1099-Misc Exceptions			

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1099-S Exceptions by Branch, Escrow Officer/Closer			
New/Mod Change	Requested By CO Ops	Incident No.	TFS No. 695335
Updating the report to exclude orders where all sellers are marked as foreign.			
Affected item(s): 1099-S Exceptions by Branch, Escrow Officer/Closer			

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CO SoftPro Summary			
New/Mod Change	Requested By CT CO Ops	Incident No.	TFS No. 699203
Update the branch column from using the Settlement Agent Number custom field to using the branch lookup code.			
Affected item(s): CO SoftPro Summary			

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OPU Task Summary/Productivity by Employee			
New/Mod Change	Requested By FT CO Ops	Incident No.	TFS No. 692804
Adding new option to show all tasks completed in the date range			
Affected item(s): OPU Task Summary/Productivity by Employee			

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DISTRICT OF COLUMBIA

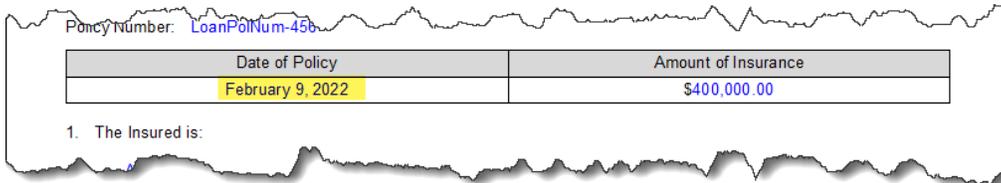
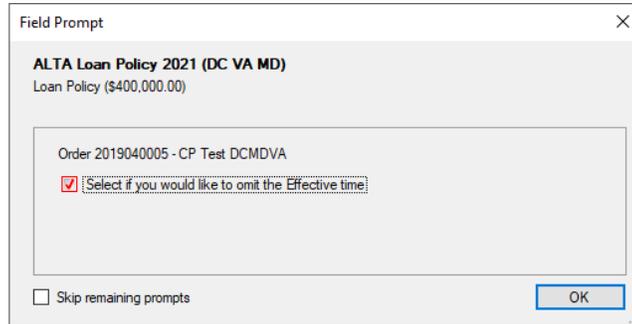
DOCUMENTS

Title

Optional effective time to show on policies

New/Mod Change	Requested By CT DC NCS	Incident No.	TFS No. 698986
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For NCS\DC\CT profile only: If the loan type is FHA or VA, the user will be prompted to select if they would like to omit the Effective time for the loan policy.



Note: If not FHA or VA loan, the user will not be prompted and the Effective time will show as usual.

Affected item(s):

- ALTA Loan Policy 2006 (DC VA MD)
- ALTA Loan Policy 2021 (DC VA MD)

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FLORIDA

DOCUMENTS

Escrow

<i>Affidavit (Fictitious Name)</i>			
New/Mod New	Requested By FL State Counsel	Incident No.	TFS No. 696603
New document provided by State Counsel. Please render to view in its entirety.			
FICTITIOUS NAME AFFIDAVIT			
STATE OF _____		Escrow No.: JM CD Test 2022-SLM	
COUNTY OF _____			
Before me, the undersigned authority, personally appeared Samuel S. Seller ("Affiant"), who, being duly sworn according to law, deposes and says:			
1. Title is vested in the name of _____ pursuant to the deed recorded in Official Records Book _____ and Page _____ (or Instrument No. _____) of the public records of _____ County, Florida.			
2. At the time the Property was purchased, _____ was registered with the state of Florida and the owner of _____ was _____.			
3. Affiant confirms that _____ is registered and current with the state of Florida.			
Affected item(s): FLD1369.doc - Affidavit (Fictitious Name) (New)			

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<i>Document Revisions for Reliant Title (4)</i>			
New/Mod Change	Requested By Reliant Title	Incident No.	TFS No. 697943
Various updates, please render to view.			
Affected item(s): Agreement (Compliance and Tax Proration) Bill of Sale FLD1370.doc - Bill of Sale (Legal) (New) Letter (Seller Welcome with Info Page)			

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HAWAII

DOCUMENTS

Escrow

<i>Form Generic Closure Authorization</i>			
New/Mod Change	Requested By Title Guaranty	Incident No.	TFS No. 700143
Freeze language removed from document, please render document to view in its entirety.			
<div style="border: 1px solid black; padding: 10px;">  <div style="float: right; font-size: small;"> 235 Queen Street Honolulu, HI 99999 Phone: (800)888-8888 / Fax: (800)999-9999 </div> <p style="text-align: center;">AUTHORIZATION PAYOFF/PAYDOWN CREDIT LINE/CREDIT CARD</p> <div style="display: flex; justify-content: space-between;"> <div style="font-size: small;"> 1st Capital Bank 1093 South Main Street Salinas, CA 93901 </div> <div style="font-size: small;"> Date: March 4, 2022 Ref. No.: POLRef123 Escrow No.: 909HF CDF SALE Borrower: Sam Seller and Sally Seller and Selling Industries Loan No.: Acct123456 </div> </div> <p style="font-size: small;">Dear 1st Capital Bank:</p> <p style="font-size: small;">I have marked the appropriate boxes to PAYOFF and CLOSE or PAYDOWN PRINCIPAL BALANCE ONLY for my Credit Line.</p> <p style="font-size: small;"><input type="checkbox"/> Please PAYOFF and CLOSE my/our account. I understand that it is my responsibility to destroy all unused checks for this account, if applicable.</p> <p style="font-size: small;">Please send all correspondence after payoff to:</p> </div>			
<p>Affected item(s): Form Generic Closure Authorization</p>			

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<i>Letter (Opening - Buyer - Seller)</i>			
New/Mod Change	Requested By FT HI	Incident No.	TFS No. 697427
Removed the Preliminary Title Report Approval language.			
<p>Affected item(s): Letter (Opening - Buyer - Seller)</p>			

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<i>Letter (Request to Open IBA)</i>			
New/Mod Change	Requested By Title Guaranty	Incident No.	TFS No. 700145
Updated the signature area to remove the hard-coded signature/date lines and replaced with the standard signature prompt.			
<p>Enclosed is a W9/W8 for the customer. Contact Joseph D Kirby at (888)111-1234 if you have any questions. Thank you for your assistance.</p> <p>Sincerely,</p> <p><i>Joseph D Kirby</i></p> <p>Joseph D Kirby Title Examiner JKirby@notreal.com</p>			
Affected item(s): Letter (Request to Open IBA)			

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Letter (Timeshare Policy Transmittal) (2)

New/Mod Change	Requested By Title Guaranty	Incident No.	TFS No. 700412
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Revised to remove the 3rd paragraph ("In twelve-eighteen (12-18) months...")

Enclosed for your records is the Chicago Title Insurance Company Certificate of Owner's Title Insurance Policy ('Certificate').

A sample copy of the cover of a Hawaii Standard Owner's Policy is available at www.tghawaii.com under Resources for your review.

Should you have any questions regarding the enclosed documents, please do not hesitate to contact us.

Thank you for this opportunity to be of service.

Title Guaranty of Hawaii, LLC
 Telephone (808)533-6261
 Email: title@tghawaii.com

Enclosure(s)

Enclosed for your records is the Chicago Title Insurance Company Certificate of Owner's Title Insurance Policy ('Certificate').

We have also enclosed a copy of the Japanese Language Translation of the Certificate. A sample copy of the cover of a Hawaii Standard Owner's Policy is available at www.tghawaii.com under Resources for your review.

Should you have any questions regarding the enclosed documents, please do not hesitate to contact us.

Thank you for this opportunity to be of service.

Title Guaranty of Hawaii, LLC
 Telephone (808)533-6261
 Email: title@tghawaii.com

Enclosure(s)

Affected item(s):
 Letter (Timeshare Policy Transmittal - Japanese Buyer)
 Letter (Timeshare Policy Transmittal)

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REPORTS

VO Funds Receipted to Closed Orders			
New/Mod New	Requested By FNF Support	Incident No.	TFS No. 692797
New ProTrust report to show information on receipts for VO Properties			
Affected item(s): SSCORP5529.rpt - VO Funds Receipted to Closed Orders (New)			

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IDAHO

MY SCREENS

Additional Title Charges Screen

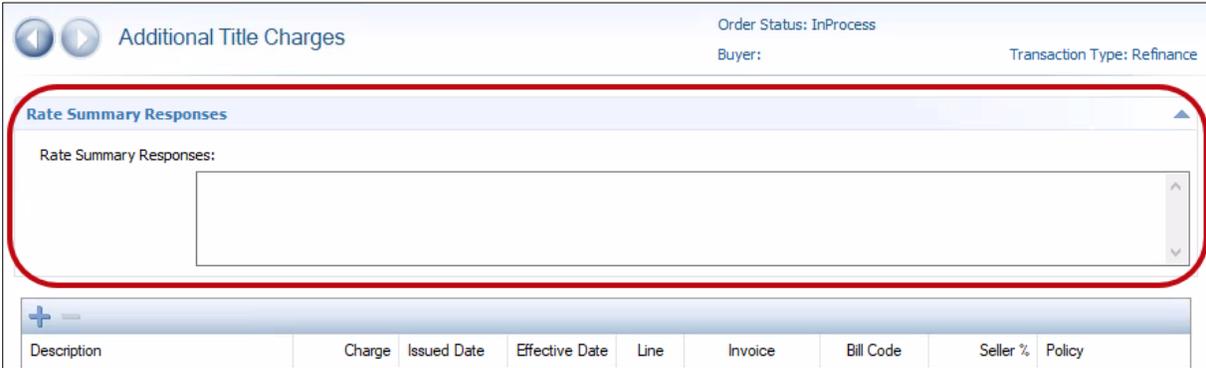
New/Mod Mod	Requested By Rates Team	Incident No.	TFS No.
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The **Additional Title Charges*** screen has been modified to include the **Rate Summary Responses** section.

This change is visible when one of the following **My Screens** is selected:

- > IDMT All Screens
- > IDMT Commercial
- > IDMT Commercial CSS
- > IDMT Escrow Screens
- > IDMT Title Screens
- > Recon Dept

*The **Additional Title Charges** screen appears in different sections (i.e., General, Sale, Invoicing etc.) depending upon the **My Screens** selected. This affects all occurrences.



The screenshot shows the 'Additional Title Charges' screen with the following details:

- Order Status: InProcess
- Buyer: [blank]
- Transaction Type: Refinance
- A section titled 'Rate Summary Responses' is highlighted with a red border, containing a scrollable area for responses.
- Below this section is a table with columns: Description, Charge, Issued Date, Effective Date, Line, Invoice, Bill Code, Seller %, and Policy.

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ILLINOIS

DOCUMENTS

Escrow

Exam Summaries (2)			
New/Mod	Requested By	Incident No.	TFS No.
Change	CT IL		700932
<p>Bolded language has been added to this paragraph: Pursuant to Section 18(b) of the Title Insurance Act, 215 ILCS 155/18(b), the undersigned certifies to Chicago Title and Trust Company and Chicago Title Insurance Company, that as producer of the title business I have or will have caused the DS-1 Disclosure to be provided to the Seller(s) and Buyer(s) or their representatives prior to the issuance of the title commitment.</p> <p>Affected item(s): Exam Summary (North or Commercial) Exam Summary (South)</p>			

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Instructions for Completing the Disclosure of Financial Interest Form (DS-1)			
New/Mod	Requested By	Incident No.	TFS No.
Change	IL		696639
<p>Instructions have been updated to reflect most recently provided version.</p> <p>Affected item(s): Instructions for Completing the Disclosure of Financial Interest Form (DS-1)</p>			

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Search Product			
New/Mod	Requested By	Incident No.	TFS No.
Change	CT Downstate		700599
<p>Added functionality for hyperlinks.</p> <p>Affected item(s): Search Product</p>			

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Escrow/Title

<i>Disclosure of Financial Interest</i>			
New/Mod Change	Requested By MW IT	Incident No.	TFS No. 696164
<p>Updates:</p> <ol style="list-style-type: none"> 1. Show the address and license number for the title agent and escrow agent. 2. Show license number of the title insurance agent 3. changing from showing dollar values to percent amounts for the owners and loan premium <p>Affected item(s): Disclosure of Financial Interest</p>			

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<i>Disclosure of Financial Interest</i>			
New/Mod Change	Requested By FNF Config Team	Incident No.	TFS No. 699069
<p>Updating the fees for chain of title, commitment update and policy update to pull into item #4 in the estimated fees section. Also, updating the split percents to pull from the attorney split custom fields.</p> <p>Affected item(s): Disclosure of Financial Interest</p>			

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<i>Disclosure Statement</i>			
New/Mod Change	Requested By FNT IL Ops	Incident No.	TFS No. 700503
<p>Various updates to show marketing source name, marketing source main contact and display of fees</p> <p>Affected item(s): Disclosure Statement</p>			

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MY SCREENS

Attorney Contact Screen

New/Mod Mod	Requested By Justin Martin	Incident No.	TFS No.
-----------------------	--------------------------------------	---------------------	----------------

The **Attorney Contact** screen has been modified to include the **Customer Preferences** field.
 This change is visible when the **My Screens > CT-Metro Escrow** is selected:

The screenshot shows the 'Attorney' screen with various input fields. A red box highlights the 'Customer Preferences' field, which is a new addition to the form. The form includes fields for 'Lookup code', 'Name', 'Short name', 'Payee name', 'Address', 'City/State/Zip', 'County', 'Phone', 'Fax', 'Email address', 'Fee transfer ledger', 'Anticipate funds as', 'Anticipate disbursement as', 'Represents', 'Divert fees to', 'Attorney Customer Type', 'Marketing rep.', 'Reference #', 'Tax ID/SSN', 'License #', 'ALTA ID', 'NMLS #', 'CDF payee type', and 'Save And Add New' button. There are also checkboxes for 'Include on revenue reports', 'Marketing source', and 'Commitment recipient'.

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REPORTS

Closing Buyer Attorney			
New/Mod New	Requested By CT IL Ops	Incident No.	TFS No. 692665
New report for CT IL to show orders with a settlement date along with marketing source and buyer attorney information			
Affected item(s): SSCORP5528.rpt - Closing Buyer Attorney (New)			

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INDIANA

DOCUMENTS

Escrow

Closing Info Request (FNT NWI)

New/Mod New	Requested By FNT NWI	Incident No.	TFS No. 697412
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New document. Please render document to view in its entirety.


Company Name

CLOSING INFORMATION REQUEST

When Completed, Return To:
 FNT Professional Services Team
 Processor: [Shirley Jons](#)
 Processor Email: S.Jones@email.com
 Tel: (219)663-5160
 Fax: (888)691-4871

****Indiana requires funds \$10,000 or more to be wired****

Date: February 1, 2022	Earnest Money Amount: \$5,000.00																											
Fidelity File No.: JM CD Test 2022	Bringing to Closing? No																											
Property: 100 Property Avenue Property City, IN 55555																												
Borrower(s): Bryan B. Buyer and Brenda B. Buyer Email: Buyer1@email.com Phone: (408)555-6677 Cell: (408)555-7777	<table border="1" style="width: 100%; text-align: center;"> <thead> <tr> <th></th> <th>Yes</th> <th>No</th> </tr> </thead> <tbody> <tr> <td>Seller Paying Closing Costs?</td> <td></td> <td></td> </tr> <tr> <td>Well</td> <td></td> <td></td> </tr> <tr> <td>Septic</td> <td></td> <td></td> </tr> <tr> <td>Termite Insp</td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> </tr> </tbody> </table>		Yes	No	Seller Paying Closing Costs?			Well			Septic			Termite Insp														
		Yes	No																									
Seller Paying Closing Costs?																												
Well																												
Septic																												
Termite Insp																												
Seller(s): Samuel S. Seller and Samantha S. Seller																												
Lender: Loans Unlimited Contact: Mary Smith Email: M.Smith@email.com Phone: (855)111-3333																												
Purchase Price: \$505,000.00																												

Affected item(s):
 IND1357.doc - Closing Info Request (FNT NWI) (New)

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Deed (Trustee's - MI) (2)

New/Mod Change	Requested By FT IN	Incident No.	TFS No. 696327
--------------------------	------------------------------	---------------------	--------------------------

Both letter and legal sizes are now available.

Affected item(s):
 Deed (Trustee's - MI)
 IND1255.doc - Deed (Trustee's - MI) - Legal (New)

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MICHIGAN

DOCUMENTS

Escrow

ABAs			
New/Mod Change	Requested By CT MI	Incident No.	TFS No. 696304
Updated and new ABAs.			
Affected item(s): Master ABA Disclosure			

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Affidavit (Affixture of Manufactured Home)			
New/Mod Change	Requested By CT MI	Incident No.	TFS No. 697201
Updated to reflect the most recently provided version.			
Affected item(s): Affidavit (Affixture of Manufactured Home)			

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MONTANA

DOCUMENTS

Escrow

Lien Waiver (Blank)			
New/Mod Change	Requested By CT Billings	Incident No.	TFS No. 697577
Removed "BLANK" from title on the document (tree name remains). If the prompt for the consideration amount is left blank it will now pull a blank line. Added an ask prompt to provide an option to add signatories or leave as-is.			
Affected item(s): Lien Waiver (Blank)			

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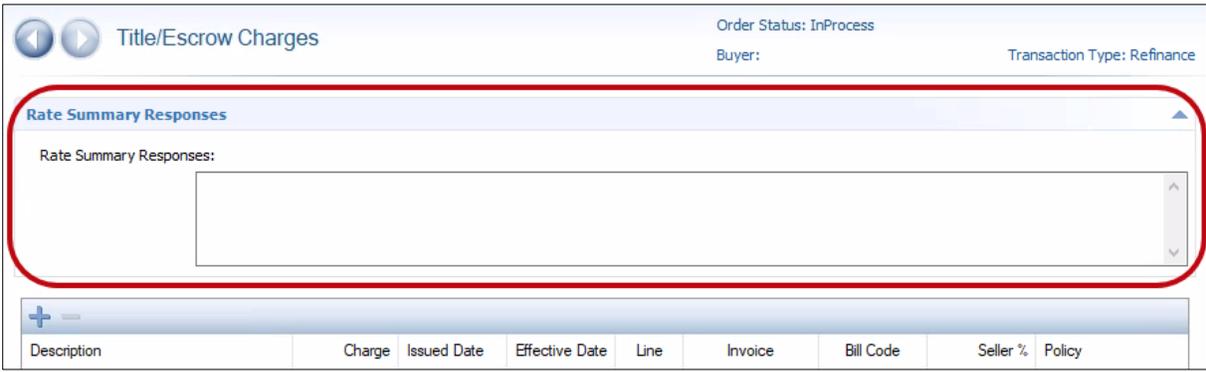
NEVADA

MY SCREENS

Title/Escrow Charges Screen

New/Mod Mod	Requested By Rates Team	Incident No.	TFS No.
-----------------------	-----------------------------------	---------------------	----------------

The **Title/Escrow Charges** screen has been modified to include the **Rate Summary Responses** section. This change is visible when the **My Screens > NV Escrow Screens** is selected:



The screenshot shows the 'Title/Escrow Charges' screen with the following details:

- Order Status: InProcess
- Buyer:
- Transaction Type: Refinance
- A new section titled 'Rate Summary Responses' is highlighted with a red box. It contains a scrollable area for responses.
- Below the section is a table with the following columns: Description, Charge, Issued Date, Effective Date, Line, Invoice, Bill Code, Seller %, Policy.

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Withhold Agreement Screen

New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.
-----------------------	--------------------------------------	---------------------	----------------

The **Withhold Agreement** screen has been modified to add the custom fields noted below. Additionally, the **Custom Field** more/less bar has been removed.

This change is visible when the **NV Escrow Screens** is selected.


Withhold Agreement

Order Status: InProcess

Buyer: Seller:

Funds to be paid to:

Funds provided by:

Funds administered by:

Funds held by:

Agreement date:

Completion date:

Private contract date:

Amount held: Line:

Account information:

Escrow fee: Line: Bill code:

Terms & conditions:

Additional instructions:

Enter the purpose for holding escrow funds:

Select the type of account in which funds are to be held:

Conditions for Release/Payment of Funds based on:

Enter the name of the party submitting the bill(s):

Enter the name of the party approving and/or signing the bill(s):

If release based on something other than a bill, the following have to be met to release funds:

Enter the date the requirements must be met by:

Release funds to:

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Prepared by: SoftPro

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REPORTS

Order Exceptions			
New/Mod Change	Requested By NV	Incident No.	TFS No. 701716
Adding "Ledger Transfer/Sent Invoice, Escrow Status not Closed" exception for NV Operations			
Affected item(s): Order Exceptions			

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Sales Rep Analysis			
New/Mod Change	Requested By TT NV	Incident No.	TFS No. 696120
Updating the sales rep split amounts to divide between the order contacts first, then from the amount allocated to a contact split that amount between the sales reps.			
Affected item(s): Sales Rep Analysis			

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Weekly Stats			
New/Mod New	Requested By TT NV Ops	Incident No.	TFS No. 696155
New report for TT NV Ops that shows a summary of orders opened and closed with revenue amounts based on transaction type			
Affected item(s): SSCORP5533.rpt - Weekly Stats (New)			

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NEW HAMPSHIRE

DOCUMENTS

Escrow

<i>Deed (Warranty)</i>			
New/Mod Change	Requested By Signature Title	Incident No.	TFS No. 697458
Revised language referring to "men" to "persons". Removed the hardcoded preamble. Revised the language for the "TOGETHER WITH" paragraph (please render to see in its entirety).			
Affected item(s): Deed (Warranty)			

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NEW YORK

DOCUMENTS

Escrow

<i>Receipt (Buffalo - Lockport)</i>			
New/Mod Change	Requested By CT Buffalo	Incident No.	TFS No. 697460
Removed "PLEASE PRINT NAME..." section and added email to the top. Removed the fax numbers for the Title Insurance and Clerk's office.			
Affected item(s): Receipt (Buffalo - Lockport)			

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NORTH CAROLINA

MY SCREENS

Attorney Contact Screen

New/Mod Mod	Requested By Justin Martin	Incident No.	TFS No.
-----------------------	--------------------------------------	---------------------	----------------

The **Location and Assigned Marketing Reps** custom fields have been removed from the **Attorney Contact** screen.

This change is visible when one of the following **My Screens** is selected:

- > FT-North Carolina Screens
- > FT-North Carolina Screens - CSS

Attorney Order Status: InProcess
Buyer:

Attorney

[Lookup code:](#)

Name:

Short name:

Payee name:

Address:

[City/State/Zip:](#) Foreign

County:

Phone: Fax:

Email address:

Fee transfer ledger:

Anticipate funds as:

Anticipate disbursement as: Disburse each charge separately

Represents:

Divert fees to:

FATIC AA Only

NATIC AA Only

Location and Assigned Marketing Reps

Marketing Rep:

Marketing Rep 2:

Marketing Rep 3:

14-Asheville:

16-Kitty Hawk:

People

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OHIO

DOCUMENTS

Escrow

<i>Affidavit (As To Title)</i>			
New/Mod Change	Requested By CT OH	Incident No.	TFS No. 696322
<p>Added new language as item 12:</p> <p>That the Corporation is not a "foreign person" as defined in the Foreign Investment Property Tax Act, Internal Revenue Code Section 1445; that the address for tax purposes is <address prompt>, and the Federal Taxpayer Identification Number is <Taxpayer ID prompt>.</p> <p>Affected item(s): Affidavit (As To Title)</p>			

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<i>DTE 100 - Real Property Conveyance Fee Statement</i>			
New/Mod Change	Requested By CT OH	Incident No.	TFS No. 701047
<p>Revised to pull the grantee's current mailing address to item 2 for Akron, Macedonia, Sheffield Village and Strongsville offices.</p> <p>Affected item(s): DTE 100 - Real Property Conveyance Fee Statement</p>			

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<i>File Cover CTT (Commercial)</i>			
New/Mod Change	Requested By CT OH	Incident No.	TFS No. 697483
<p>Added Pre-closer/Escrow assistant and revised the placement (please render to view in its entirety).</p> <p>Affected item(s): File Cover CTT (Commercial)</p>			

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<i>Filing Sheet</i>			
New/Mod Change	Requested By CT OH	Incident No.	TFS No. 696635
<p>Revised the Title Processor to pull from the Pre-Closer/Escrow assistant. Also changed "Attn" to "Filer" and added an additional line for the filer's information.</p> <p>Affected item(s): Filing Sheet</p>			

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OKLAHOMA

DOCUMENTS

Escrow

<i>Affidavit (Mortgage Tax)</i>			
New/Mod Change	Requested By CT OK	Incident No.	TFS No. 700601
Removed logic for the maturity date to only show blank line.			
Affected item(s): Affidavit (Mortgage Tax)			

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<i>Logo Revisions</i>			
New/Mod Change	Requested By CT OK	Incident No.	TFS No. 701049
Corrected documents rendered with CHIO3401 and profile OK\CT to pull the correct logo.			
Affected item(s): Caption Sheet			

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OREGON

DOCUMENTS

Escrow

<i>Early Issue Approval Form (1-4 Family)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	Ticor Title	INC220062100	697939
Document has been corrected to properly show the selection chosen by the user for "Reason for Approval Request".			
Affected item(s): Early Issue Approval Form (1-4 Family)			

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<i>General Provisions</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	OR		697929
Revisions to language and titles as requested.			
Affected item(s): General Provisions - Refi (esign - Legal) General Provisions - Refi (esign) General Provisions - Sale (esign)			

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<i>OME/OAE Change Requests (4)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	TT Medford		700593
Revised to show the main contact associated with the title contact for the email in the "End of Reported Information" section, if that information is not available then it will pull the title office/examiner.			
Affected item(s): OAE Report OME Report Personal Property Search Title Plant Records Report			

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MY SCREENS

Additional Title Charges Screen

New/Mod Mod	Requested By Rates Team	Incident No.	TFS No.
-----------------------	-----------------------------------	---------------------	----------------

The **Additional Title Charges*** screen has been modified to include the **Rate Summary Responses** section.

This change is visible when one of the following **My Screens** is selected:

- > OR All Screens
- > OR Commercial
- > OR Commercial CSS
- > OR Escrow Screens
- > OR Title Screens
- > Oregon RLC Screens
- > Recon Dept

*The **Additional Title Charges** screen appears in different sections (i.e., Sale, Commercial, General, etc.) depending upon the **My Screens** selected. This affects all occurrences.

⏪
⏩
Additional Title Charges

Order Status: InProcess

Buyer:

Transaction Type: Refinance

Rate Summary Responses

Rate Summary Responses:

+
-

Description	Charge	Issued Date	Effective Date	Line	Invoice	Bill Code	Seller %	Policy

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REPORTS

Opened/Closed Orders			
New/Mod Change	Requested By NW IT	Incident No.	TFS No. 697979
Adding ECR and EAW billcodes in the revenue amount shown.			
Affected item(s): Opened/Closed Orders			

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Order Count/Revenue Summary			
New/Mod Change	Requested By NW IT	Incident No.	TFS No. 697976
Updating alternate billcodes for OR that will move the "EAW" and "ECR" bill codes from the "Other Revenue" column to show in the "Escrow Revenue" columns			
Affected item(s): Order Count/Revenue Summary			

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WASHINGTON

DOCUMENTS

Escrow

Master Real Estate Excise Tax Affidavit (2020) (4)			
New/Mod	Requested By	Incident No.	TFS No.
Change	WA		697415
<p>Updated all versions to include cell phone numbers as a choice for the grantor and grantee's phone numbers. The "Exempt" version has been updated to look to the grantor/grantee forwarding addresses first, if not entered then will still pull the contact's forwarding addresses. Also, updated all versions to the most recent version.</p> <p>Affected item(s): Master Real Estate Excise Tax Affidavit - Exempt (2020) Master Real Estate Excise Tax Affidavit (2020) Master Real Estate Excise Tax Affidavit (2020) Multiple Affidavits Master Real Estate Excise Tax Affidavit (2020) Multiple Location</p>			

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MH Real Estate Excise Tax Affidavit			
New/Mod	Requested By	Incident No.	TFS No.
Change	WA		700926
<p>Updated to most recent version.</p> <p>Affected item(s): MH Real Estate Excise Tax Affidavit</p>			

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RE Agent Commission Requests (3)			
New/Mod	Requested By	Incident No.	TFS No.
Change	CT Bellingham		697423
<p>Updated the title on the document (tree title is remaining the same).</p> <p>Affected item(s): RE Agent Commission Request RE Agent Commission Request (Listing) RE Agent Commission Request (Selling)</p>			

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<i>Recordables (60)</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	WA		700979
Updated recordables to so that only the return address is in the top 3 inches.			
<p>Affected item(s):</p> <ul style="list-style-type: none"> Assignment of Deed of Trust (LPB 21) Assignment of Deed of Trust (LPB 21) Letter Bargain and Sale Deed (LPB 15) Bargain and Sale Deed (LPB 15) Letter Bill of Sale (LPB 30) Bill of Sale (LPB 30) Letter Deed and Purchaser's Assignment RE Contract (LPB 14) Deed and Seller's Assignment RE Contract (LPB 13) Deed and Seller's Assignment RE Contract (LPB 13) Letter Deed of Trust (LPB 22) Deed of Trust (LPB 22) Letter Deed of Trust with Due on Sale and Due Date (LPB 22A) Deed of Trust with Due on Sale and Due Date (LPB 22A) Letter Deed of Trust-Short Form (LPB 20) Deed of Trust-Short Form (LPB 20) Letter Mortgage-Statutory Form (LPB 50) Mortgage-Statutory Form (LPB 50) Letter Partial Release of Judgment (LPB 63) Partial Release of Judgment (LPB 63) Letter Partial Release of Lien (LPB 61) Partial Release of Lien (LPB 61) Letter Partial Release of Mortgage (LPB 52) Partial Release of Mortgage (LPB 52) Letter Partial Waiver of Lien (LPB 65) Partial Waiver of Lien (LPB 65) Letter Personal Property Security Agreement (LPB 73) Personal Representative Deed (LPB 74) Personal Representative Deed (LPB 74) Letter Promissory Note (LPB 28A-05) Promissory Note (LPB 28A-05) Letter Quit Claim Deed (LPB 12) Quit Claim Deed (LPB 12) Letter Real Estate Contract-Long Form (LPB 45) Real Estate Contract-Long Form (LPB 45) Letter Real Estate Contract-Short Form (LPB 44) Real Estate Contract-Short Form (LPB 44) Letter Release of Lien (LPB 60) Request for Full Reconveyance (LPB 23) Request for Notice (LPB 29) Request for Notice (LPB 29) Letter Request for Partial Reconveyance (LPB 24) Satisfaction of Judgment (LPB 62) Satisfaction of Judgment (LPB 62) Letter Satisfaction of Mortgage (LPB 51) Satisfaction of Mortgage (LPB 51) Letter Special Power of Attorney-Purchase-Encumber (LPB 71) Special Power of Attorney-Purchase-Encumber (LPB 71) Letter Special Power of Attorney-Sale (LPB 70) Special Power of Attorney-Sale (LPB 70) Letter Statutory Warranty Deed - Fulfillment (LPB 11) Statutory Warranty Deed - Fulfillment (LPB 11) Letter Statutory Warranty Deed (LPB 10) Statutory Warranty Deed (LPB 10) - NCS Statutory Warranty Deed (LPB 10) Letter Subordination Agreement - Existing Loan (LPB 35) Subordination Agreement - Existing Loan (LPB 35) Letter Subordination Agreement - New Loan (LPB 35) Legal Subordination Agreement - New Loan (LPB 35) Letter Waiver of Lien (LPB 64) Waiver of Lien (LPB 64) Letter 			

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MY SCREENS

Additional Title Charges Screen

New/Mod Mod	Requested By Rates Team	Incident No.	TFS No.
-----------------------	-----------------------------------	---------------------	----------------

The **Additional Title Charges*** screen has been modified to include the **Rate Summary Responses** section.

This change is visible when one of the following **My Screens** is selected:

- > **Recon Dept**
- > **WA Commercial CSS**
- > **WA Commercial Screens**
- > **WA Escrow Screens**
- > **WA Payoff Screen**
- > **WA Screen List**
- > **WA Title Screens**

*The **Additional Title Charges** screen appears in different sections (i.e., General, Settlement Statement Invoicing, etc.) depending upon the **My Screens** selected. This affects all occurrences.

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LIBERTY TITLE

DOCUMENTS

Escrow

REW Forms (3)			
New/Mod Change	Requested By Signature Title	Incident No.	TFS No. 697454
Revised to work with LLCs and when the seller contact type is an LLC, members of the LLC that are entered in the file will render to the document.			
Affected item(s): Form REW-1-1040 Form REW-1-1041 Form REW-1-1120			

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NOVARE NATIONAL SETTLEMENT SERVICES

DOCUMENTS

Escrow

<i>Certification of Electronic Document (TN)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New	Novare		697475
New document. Please render document to view in its entirety.			
 			
<p>I, _____, do hereby make oath that I am a licensed attorney and/or the custodian of the original version of the electronic document tendered for registration herewith and that this electronic document is a true and exact copy of the original document executed and authenticated according to law on _____ (date of document).</p> <p>IN WITNESS WHEREOF, the undersigned have executed this document on the date(s) set forth below.</p> <p>_____</p> <p style="text-align: center;">Signature</p> <p>_____</p> <p>Print Name</p>			
<p>Affected item(s): NOVD1214.doc - Certification of Electronic Document (TN) (New)</p>			

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<i>EI - Third Party Deposits (4)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	Novare		697467
Added new language for Novare operations which now reads "You are instructed to apply these funds and all future deposit(s) in the above..."			
<p>Affected item(s): EI - Third Party Deposit EI - Third Party Deposit - Multiple Parties EI - Third Party Deposit - Multiple Parties (Legal) EI - Third Party Deposit (Legal)</p>			

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FSBO Questionnaire

New/Mod New	Requested By Novare	Incident No.	TFS No. 698788
-----------------------	-------------------------------	---------------------	--------------------------

New document. Please render to view in its entirety.

	<p>SELLER AND BUYER QUESTIONNAIRE FOR PREPARATION OF SALE ESCROW INSTRUCTIONS</p>
<p>In response for your request to prepare Sale Escrow Instructions, we ask that you complete this questionnaire and return it to our office. This information must be provided to Fidelity before we can prepare Sale Escrow Instructions. Sale Escrow Instructions are instructions that both Buyer and Seller will sign instructing Fidelity as to how this transaction is to be closed, and is not meant to replace a Contract.</p> <p><u>Buying and Selling real estate can have serious legal and tax consequences. We strongly urge you to seek the advice of a licensed attorney or certified public accountant prior to entering into or closing a real estate transaction. You may also wish to employ the services of a licensed real estate agent.</u> Fidelity National Title Agency, Inc., is a neutral third party and cannot negotiate or give legal or financial advice to you regarding this transaction or any contract or documents previously entered into.</p> <p>PLEASE READ THIS ENTIRE FORM CAREFULLY AND ANSWER ALL APPLICABLE QUESTIONS. IF ANY INFORMATION DOES NOT APPLY TO YOUR THIS TRANSACTION, PLEASE ENTER "N/A".</p> <p style="text-align: center;"><u>PLEASE CLEARLY PRINT ALL INFORMATION.</u></p> <p>1. SELLER INFORMATION</p> <p>Print name of Seller(s) as it appears on the current Deed: <input type="text"/></p> <p>Mailing Address: <input type="text"/> Street or Box Number</p> <p>City <input type="text"/> State <input type="text"/> Zip Code <input type="text"/></p> <p>Day (work) Phone: <input type="text"/> Evening (home) Phone: <input type="text"/></p> <p>Fax: <input type="text"/> Email: <input type="text"/></p>	

Affected item(s):
NOVD1215.doc - FSBO Questionnaire (New)

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Escrow/Title

<i>Disclosure of Financial Interest</i>			
New/Mod Change	Requested By FNF Config Team	Incident No.	TFS No. 700424
Updating form to show settlement agent, title company and underwriter along with title officer name and split percents.			
Affected item(s): Disclosure of Financial Interest			

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MY SCREENS

Escrow Instructions Screen

New/Mod Mod	Requested By Roberta Stone	Incident No.	TFS No.
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The **Escrow Instructions** screen has been modified to include new Escrow Instructions for the following:

- › ID – Purchase and Sale
- › ID – Refinance
- › OR – Borrower
- › OR – Sale
- › OR – Buyer
- › OR – Seller
- › WA – Refi – Part 1 of 1
- › WA – Sale – Part 1 of 1
- › WA – Supplement to EI-Refi
- › WA – Supplement to EI-Sale

These changes are visible when the **My Screens > Novare All Screens** is selected.



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REPORTS

IL Agent Fees			
New/Mod Change	Requested By Novare Ops	Incident No.	TFS No. 696341
New report that will work the same as the IL Agent Fees but will display the amounts of the TIEFF billcode.			
Affected item(s): IL Agent Fees			

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Order Exceptions			
New/Mod Change	Requested By Novere Ops	Incident No.	TFS No. 697203
Updating to show the ledger balance with the trust account mis-match exceptions			
Affected item(s): Order Exceptions			

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Receipts/Disbursements List by Project			
New/Mod Change	Requested By Novare Ops	Incident No.	TFS No. 695333
<ol style="list-style-type: none"> 1. Adding an option to search based on order number 2. Adding a PDF format option. 			
Affected item(s): Reciepts/Disbursements List by Project			

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SERVICELINK

DOCUMENTS

Escrow/Title

<i>Disclosure of Financial Interest</i>			
New/Mod Change	Requested By FNF Config Team	Incident No.	TFS No. 697873
Updating form for ServiceLink to show the correct details for Settlement Agent, Title Agent, Underwriter, Fees and producer.			
Affected item(s): Disclosure of Financial Interest			

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STRATEGIC MARKETING SERVICES

DOCUMENTS

Escrow

<i>Wire Account Notification (NCS - Commercial)</i>			
New/Mod Change	Requested By SMS	Incident No. INC220058744	TFS No. 697941
Revised for VA\SMS profiles to pull the ACCOUNT NAME from the Payee Name field.			
Affected item(s): Wire Account Notification (NCS - Commercial)			

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NCS

DOCUMENTS

Escrow

<i>Wire Account Notification (NCS - Commercial)</i>			
New/Mod Change	Requested By SMS	Incident No. INC220058744	TFS No. 697941
Revised for VA\SMS profiles to pull the ACCOUNT NAME from the Payee Name field.			
Affected item(s): Wire Account Notification (NCS - Commercial)			

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REPORTS

Order Exceptions			
New/Mod Change	Requested By Nat'l Ins. of NY	Incident No.	TFS No. 697973
Adding National Title Insurance of NY profiles to match NCS operations exceptions list.			
Affected item(s): Order Exceptions			

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TECHNICAL NOTES (FOR LOCAL IT/SUPPORT)

Any new documents or reports in this build are listed in the Title and/or Escrow User Release Notes. Due to the state-specific 'All Documents' tree, these new documents are automatically available to the users upon the push to test or production.

However, those new documents or reports may also need to be added to the operation specific tree(s) for packaging and other purposes. This is at your discretion.

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