

SOFTPRO SELECT

May 2023
RELEASE NOTES



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ALL STATES/SITES

DOCUMENTS

Escrow

<i>COVID-19 Forms</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	FNF Corporate		763580
<p>The Biden Administration announced its intent to end the national emergency and public health emergency declarations on May 11, 2023, related to the COVID-19 pandemic. As a result, the COVID-19 signing notices have been removed from the FNF direct operation databases and from each operation's document tree with this build.</p> <p>Affected item(s): General Notice (COVID-19) General Notice (COVID-19) - Spanish Notice to Agents and Closers (COVID-19) Signing Appointment Notice (COVID-19) Signing Appointment Notice COVID-19 (Graphic - Spanish) Signing Appointment Notice COVID-19 (Graphic)</p>			

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<i>Escrow Closing Status (ECS)</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	Escrow Admin		762281
<p>Revised to automatically pull all notes that are associated with the tasks that pull to the document.</p> <p>Affected item(s): Escrow Closing Status (ECS)</p>			

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<i>Information Collection Form</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	Title Guaranty		764695
<p>Revised "Full Name" to "Full Legal Name" throughout form. Also, added new paragraph on page 1: "List all persons who directly or indirectly, owns a Twenty Five Percent 25% or more of the equity interests of the Purchasing Entity beginning on page 2."</p> <p>Affected item(s): Information Collection Form</p>			

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Escrow/Title

<i>Corporate Invoice</i>			
New/Mod Change	Requested By Config	Incident No.	TFS No. 762718
<p>Added new custom field to update title of each invoice independently. Existing custom field (A below) to update title can still be used.</p> <p>A. Invoice Title (Context Order) - Applies to all invoices</p> <ul style="list-style-type: none"> o Custom Field Type: Text - limit 50 characters o Logic: Text to overwrite title of "Invoice" to custom title, for all invoices o Custom Field Code Name: {{Order.InvoiceCustomTitle_FNF#}} o Note: When the custom field does not contain the word "Invoice" the order number used for scanning in the top right corner will be suppressed. If B (below) is also populated for the invoice it is used over this custom field. <p>B. Invoice Title (Context Invoice) - Applies to each individual invoice</p> <ul style="list-style-type: none"> o Custom Field Type: Text - limit 50 characters o Logic: Text to overwrite title of "Invoice" to custom title, for single invoice o Custom Field Code Name: {{Order.Invoice.InvoiceCustomTitle_FNF#}} o Note: When the custom field does not contain the word "Invoice" the order number used for scanning in the top right corner will be suppressed. If A (above) is also populated on the order this custom field is used over A. <p>Affected item(s): HTML Invoices Programming Notes Invoice</p>			

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Title

2021 ALTA Commitments, Policies, Endorsements			
New/Mod Change	Requested By FNTG Form Filing	Incident No.	TFS No. 716428
<p>The following new 2021 ALTA title products are being made available (if applicable*) for issuance in SoftPro Select for states where the forms have been filed: (For states that file with modifications, these will be available 'w-[ST] Mod'.)</p> <ul style="list-style-type: none"> · ALTA Commitment 2021 · ALTA Short Form Commitment 2021* · ALTA Owner's Policy 2021 · ALTA Homeowner's Policy of Title Insurance 2021 · ALTA Loan Policy 2021 · ALTA Expanded Coverage Residential Loan Policy-Assessments Priority 2021* · ALTA Expanded Coverage Residential Loan Policy-Current Assessments 2021* · ALTA Short Form Expanded Coverage Residential Loan Policy-Assessments Priority 2021* · ALTA Short Form Expanded Coverage Residential Loan Policy-Current Assessments 2021* · ALTA Short Form Residential Loan Policy-Assessments Priority 2021* · ALTA Short Form Residential Loan Policy-Current Assessments 2021* · Multiple corresponding 2021 ALTA revised Endorsements · New ALTA 34.1 - Identified Exception & Identified Risk Coverage Endorsement · New ALTA 47 series - Operative Law Endorsements* <p>*Note: Several ALTA Expanded and Short Form products are being made available only as approved by individual states' underwriting counsel.</p> <p>Endorsement Note: For purposes of enabling the appropriate Custom Fields to be displayed for each of the new 2021 version endorsements, the "-06" designation will continue to appear in the Code field only. This is a technical requirement only and the "-06" will not appear in the Description or print anywhere on the 2021 version endorsement forms.</p>			

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INTEGRATIONS

<i>FNF Title Search Export</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
Removed flag providing the ability to opt out of sending to Property Insights.			

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REPORTS

Escrow

Commercial Portfolio Statement (CSS) (FNF UG 113)			
New/Mod	Requested By	Incident No.	TFS No.
New	UG		749524
New Commercial Portfolio Statement for CSS orders.			
Affected item(s): SSCORP5573.rpt - Commercial Portfolio Statement (CSS) (New)			

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FinCen			
New/Mod	Requested By	Incident No.	TFS No.
Change	Co Compliance and Regulation		764621
Updated logic to include new counties and states.			
Affected item(s): FinCen			

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Orders By Contact			
New/Mod	Requested By	Incident No.	TFS No.
Fix	NW IT		764360
Updated Footer to indicate the exclamation point means the "Rush order" box was checked.			
Affected item(s): Orders By Contact			

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Orders by Project (SmartView)			
New/Mod	Requested By	Incident No.	TFS No.
New	FNF Config		757932
New report for SmartView.			
Affected item(s): Orders by Project (SmartView)			

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Property Information Search			
New/Mod	Requested By	Incident No.	TFS No.
Change	FNT SAC Admin		761612
Added a column for Escrow Officer to the Excel export.			
Affected item(s): Property Information Search			

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COMMERCIAL

DOCUMENTS

Escrow

<i>Payment Transmittal Form (Agency) - Prompts (Split Sheet)</i>			
New/Mod Change	Requested By Novare	Incident No.	TFS No. 762239
Added prompts for the percentages of 'Premium to Agent' and 'Premium to Agency'.			
Affected item(s): Payment Transmittal Form (Agency) - Prompts (Split Sheet)			

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ARIZONA

DOCUMENTS

Escrow

<i>Information Form (Seller)</i>			
New/Mod Change	Requested By Lawyers Title Arizona Maricopa	Incident No.	TFS No. 764855
Updated to add Item #8.			
<div style="border: 1px solid black; padding: 10px;"> <p>7. If you are out of state, will you be in town for the closing? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>_____</p> <p>_____</p> <p>8. My Current Marital Status: <input type="checkbox"/> Unmarried <input type="checkbox"/> Married <input type="checkbox"/> Widowed</p> <p>If title is held as a Trust - a complete copy of the trust and addendums are required for review prior to close of escrow.</p> <p>If title is held as a LLC/Partnership/Corporation - a complete copy of the governing documents are required for review prior to close of escrow.</p> </div>			
<p>Affected item(s): Information Form (Seller)</p>			

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REPORTS

Bill Code Updates			
New/Mod Change	Requested By FNT AZ/Shannon Graham	Incident No.	TFS No. 759536
Updated Bill Codes across all reports.			

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Closed Orders by Revenue Operation			
New/Mod Change	Requested By GCTA Admin	Incident No.	TFS No. 765939
Updated Bill Code logic.			
Affected item(s): Closed Orders by Revenue Operation			

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FNT Admin Dump Report			
New/Mod New	Requested By FNT AZ/Shannon Graham	Incident No.	TFS No. 756378
New report for FNT AZ.			
Affected item(s): FNT Admin Dump Report			

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Opened/Closed/Canceled Orders by Reps w/Agents			
New/Mod Fix	Requested By FNT Agency	Incident No.	TFS No. 762573
Updated to correct the company and main contact repeating once for each additional contact.			
Affected item(s): Opened/Closed/Canceled Orders by Reps w/Agents			

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CALIFORNIA

DOCUMENTS

Escrow

<i>El Supplemental Holdback (Funds Held)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	CT CA		762746
Added option to include lender(s) signatures for CA operations.			
Affected item(s): El Supplemental Holdback (Funds Held)			

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<i>HOA Demand Request</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	FNT San Diego		765710
Revised language for items 8 and 9 and added a new item 10.			
<div style="border: 1px solid black; padding: 10px;"> <p>7. Additional requirements, other than as stated above, for transfer of membership are: _____</p> <p>8. Any special, emergency or upcoming changes to assessments? _____</p> <p>9. Any pending litigation or notice of common area defects? _____</p> <p>10. Any notice of violation(s) regarding this ownership interest? _____</p> <p>At close of your escrow, advise us the name of new owner and the date of transfer of title.</p> </div>			
Affected item(s): HOA Demand Request			

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<i>Preliminary Report Approvals (4)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	Escrow Admin	INC230142190	763046
Updated the paragraph number to read 16A when CAR Vacant Land is selected.			
Affected item(s): Preliminary Report Approval - Buyer Preliminary Report Approval - Buyer Preliminary Report Approval - Buyer - DS Preliminary Report Approval - Buyer - DS			

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<i>Revocation of Transfer on Death Deed</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	CTI Sacramento		765720
Updated to reflect most recent version. Please render to view in full.			
Affected item(s): Revocation of Transfer on Death Deed			

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<i>Settlement Statements (CDF/HUD)</i>			
New/Mod Change	Requested By Config	Incident No.	TFS No. 762711
<p>Updated title of the settlement statements to include "Settlement" in the title of documents, for FNT/LA only. *This does not change the name in the tree, only the title on the first page.</p> <p>Affected item(s): Individual Settlement Statement, Legal Individual Settlement Statement, Legal (CDF) Individual Settlement Statement, Letter Individual Settlement Statement, Letter (CDF) Settlement Statements SPAdmin Settlement Statement Programming Notes</p>			

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<i>Signing Confirmation</i>			
New/Mod New	Requested By CT CA	Incident No.	TFS No. 762748
<p>New document. Please render to view in full.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between; align-items: center;">  <div style="text-align: center;"> <p>CHICAGO TITLE INSURANCE COMPANY</p> </div> <div style="text-align: right;"> <p>SELLER SIGNING CONFIRMATION</p> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 20px;"> <div style="width: 45%;"> <p>Joseph D Kirby, Title Examiner Chicago Title Insurance Company 236 Quarry Road Greenville, CA 99999 Phone: (800)777-4444 Fax: (888)111-4321</p> </div> <div style="width: 45%;"> <p>Date: May 5, 2023 Ref. No.: SARefNum111 Title No.: TitleRefNum222 Escrow No.: MS CD 2022 CA-FNT-JDK Property: 100 Property Street, Unit 100A Northridge, CA 91324</p> </div> </div> <div style="text-align: center; margin-top: 20px;"> <p>UPCOMING SIGNING APPOINTMENT DETAILS</p> </div> <p>Congratulations on your upcoming real estate closing. We look forward to helping you through the final stages of the transaction and appreciate the opportunity to serve you.</p> <p>Your signing appointment has been scheduled for:</p> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="width: 45%;"> <p>Date: June 30, 2023 Time: 09:30 AM Location: Chicago Title Insurance Company 236 Quarry Road, Greenville, CA 99999</p> </div> <div style="width: 45%;"> <p>Notary: Nancy Notary Notary Phone: (999)234-5678</p> </div> </div> <p>All parties should be present for signing and have a valid Driver's License, State issued ID Card, or Passport to show to notary. Please also be prepared to provide instructions regarding payment of your proceeds (including wiring instructions, if applicable), in the event you have not already provided disbursement instructions. IMPORTANT: Please confirm wiring instructions with your financial institution.</p> <p>If you have any questions, please contact your Escrow Officer Joseph D Kirby, (888)111-5555 or email at JKirby@notreal.com.</p> </div>			

Affected item(s):

SCA0002981.doc - Signing Confirmation (New)

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Title

<i>CLTA Standard Coverage Loan Policy - 2022</i> <i>CLTA Standard Coverage Owner's Policy - 2022</i>			
New/Mod New	Requested By CLTA Form Filing	Incident No.	TFS No. 761381
The 2022 CLTA Standard Coverage Policies are now available for issuance for properties in the state of California.			

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INTEGRATIONS

<i>Rate Validation Tool</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>Binder product code and configuration changes.</p> <ul style="list-style-type: none">- ResaleEligible data point value defaults to "No" and sent in the request.- PriorBinderLiability AmountPriorCoverageType<ul style="list-style-type: none">- added support for *Binder Fee-Owners endorsement- Policy Surcharge is written back to this endorsement in Select- FuturePolicyForm data point value is picked up from Select Rate Services screen's answer field and shown in CRU Rate Services view			

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MY SCREENS

<i>All Screens</i>							
New/Mod Mod	Requested By Roger Lowrey	Incident No.	TFS No.				
<p>The Expressions have been modified as follows,</p> <ul style="list-style-type: none"> > Added: Invoice Status > Removed: Settlement Date <p>These entries are visible when one of the following My Screens is selected:</p> <ul style="list-style-type: none"> > SoCal Payoff Screens Impact to SPS > SoCal Sub Escrow Screens > SoCal Title Screens Impact to SPS <div style="border: 1px solid #ccc; padding: 10px; margin: 10px auto; width: fit-content;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">Buyer: B. B. Buyer</td> <td style="padding: 5px;">Seller: Sully Seller</td> </tr> <tr> <td style="padding: 5px;">Address: 123 Main Street</td> <td style="padding: 5px; border: 2px solid red; border-radius: 15px;">Invoice Status: Pending</td> </tr> </table> </div>				Buyer: B. B. Buyer	Seller: Sully Seller	Address: 123 Main Street	Invoice Status: Pending
Buyer: B. B. Buyer	Seller: Sully Seller						
Address: 123 Main Street	Invoice Status: Pending						

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<i>Closing Section</i>			
New/Mod	Requested By	Incident No.	TFS No.
Mod	Roger Lowrey		
<p>The HOA Charges & Prorations screen has been renamed to Prorations HOA Other in the Closing section.</p> <p>This change is visible when the My Screens > SoCal Escrow Screens Impact to SPS screen is selected.</p> <div style="border: 1px solid gray; padding: 10px; margin: 10px auto; width: fit-content;"> <ul style="list-style-type: none"> Open Order/General Document Preparation Closing CDF Pg1-Closing Info/Proj Pymts CDF Pg2-Sections A-J CDF Pg3-Sections K-N & Calc Cash to Close CDF Pg4-Loan Disclosure, AP, AIR CDF Pg5-Loan Calc, Other Disc, Contacts County Taxes & Prorations Additional Taxes & Prorations ▶ Prorations HOA Other Rent Schedule & Prorations Loan Information & Funding Policy Selection Title Insurance Premiums Endorsements Escrow and Title Charges Order Transactions Order Balance Seller Proceeds & 1099-S Options Recording Information Loan Terms & Payments Delivery & Tracking </div>			

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<i>Open Order / General and Document Preparation Sections</i>			
New/Mod	Requested By	Incident No.	TFS No.
Mod	Roger Lowrey		
<p>The following sections have been modified:</p> <ul style="list-style-type: none"> › Open Order / General – the following screens have been re-ordered to show as: <ul style="list-style-type: none"> » Order Contacts » Order Entry » Order Notes › Document Preparation - the following screens have been added: <ul style="list-style-type: none"> » Existing Liens/AITD » Reconveyance / Substitution <p>These changes are visible when the My Screens > SoCal Title Screens Impact to SPS screen is selected.</p> <div style="border: 1px solid gray; padding: 10px; margin: 10px auto; width: fit-content;"> <div style="border: 1px solid gray; border-radius: 10px; padding: 5px; margin-bottom: 5px; background-color: #e6f2ff;"> <p>Open Order/General</p> <ul style="list-style-type: none"> Order Contacts Order Entry Order Notes Property Policy Selection Title Insurance Premiums Status </div> <div style="border: 1px solid gray; border-radius: 10px; padding: 5px; margin-bottom: 5px; background-color: #e6f2ff;"> <p>Prelim</p> </div> <div style="border: 1px solid gray; border-radius: 10px; padding: 5px; margin-bottom: 5px; background-color: #e6f2ff;"> <p>Document Preparation</p> <ul style="list-style-type: none"> Supplemental Report Payoff Instructions Deed Existing Liens/AITD Reconveyance / Substitution </div> </div>			

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Order Entry Screen

New/Mod Mod	Requested By Robert Lowrey	Incident No.	TFS No.
-----------------------	--------------------------------------	---------------------	----------------

The **Order Entry** screen has been modified to include the,

- > **Properties** section
 - » **City**
 - » **Village**
- > **Additional Fields** section
 - » **FNTG Product Type**

These changes are visible when the **My Screens > SoCal Title Screens Impact to SPS** screen is selected.

The screenshot shows the 'Order Entry' interface. At the top, there are navigation arrows and the title 'Order Entry' with a 'Buyer:' field. Below this is a 'smartview Order No.:' input field and a 'SEND TO TITLE' button. A 'Send to Title:' field and an 'Order Title Search' checkbox are also present.

The 'Properties (1)' section contains a table with one row:

Property Address	Site Number/Name	City/State/Zip	Lot(s)
1			

Below the table are several input fields: 'Property address:', 'City:', 'State:', 'Zip Code:', and a 'Foreign' checkbox. The 'In the:' section includes dropdowns for 'County', 'City', and 'Village', each followed by an 'of' field and a 'GLC' field. The 'City' and 'Village' dropdowns are circled in red.

The 'Notes (0)' section is empty. The 'Additional Fields' section includes: 'Ownership profile:' (a dropdown menu), 'Related order(s):' (input field), 'Project name:' (input field), and 'FNTG Product Type:' (input field), which is also circled in red.

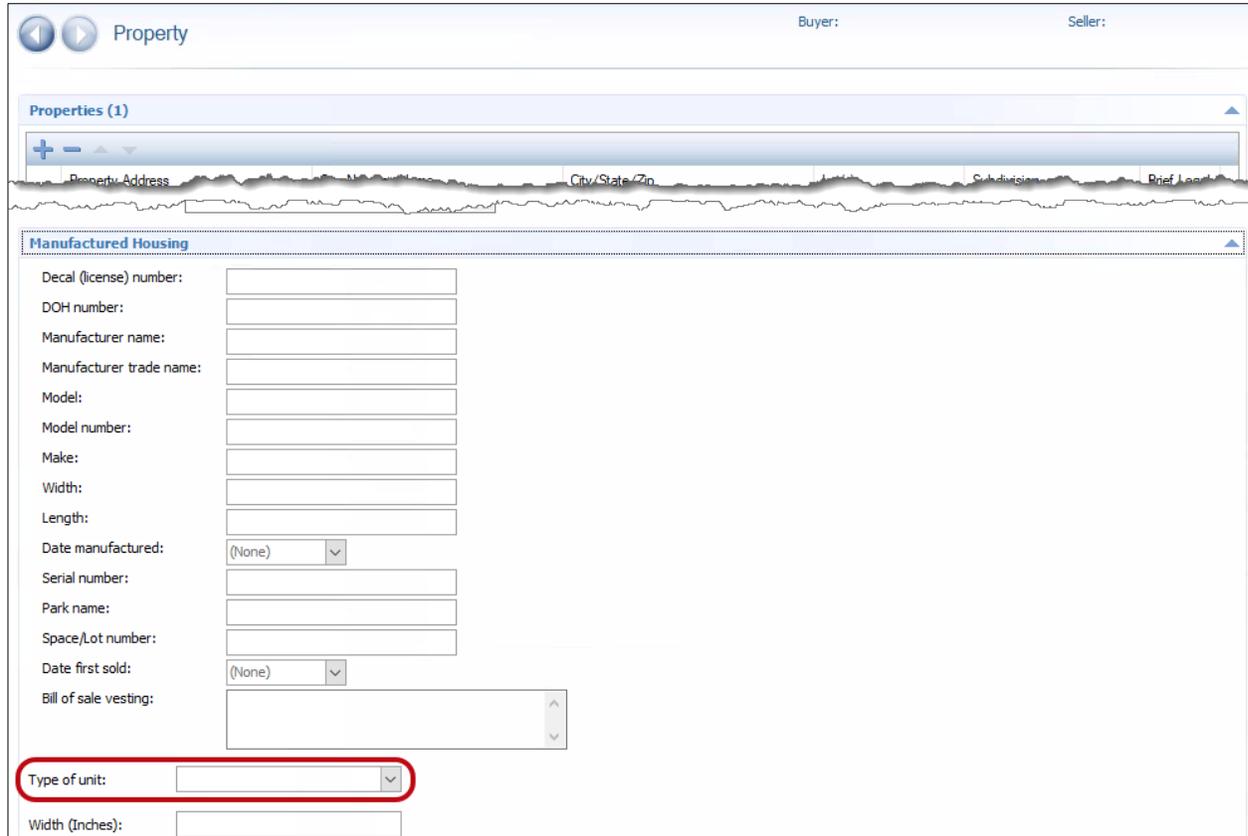
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Property Screen

New/Mod Mod	Requested By Robert Lowrey	Incident No.	TFS No.
-----------------------	--------------------------------------	---------------------	----------------

The **Property** screen has been modified to include the **Type of unit** field in the **Manufactured Housing** section.

This change is visible when the **My Screens > SoCal Title Screens Impact to SPS** screen is selected.



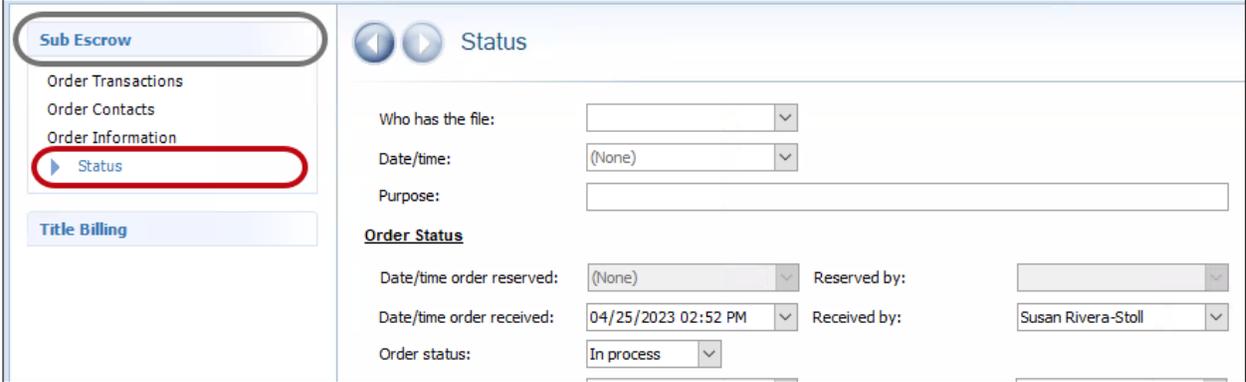
The screenshot shows the 'Property' screen interface. At the top, there are navigation arrows and the title 'Property'. Below this, there are fields for 'Buyer:' and 'Seller:'. A section titled 'Properties (1)' contains a table with columns for 'Property Address', 'City/State/Zip', 'Subdivision', and 'Prop. Lead'. Below the table is the 'Manufactured Housing' section, which contains several input fields and dropdown menus:

- Decal (license) number:
- DOH number:
- Manufacturer name:
- Manufacturer trade name:
- Model:
- Model number:
- Make:
- Width:
- Length:
- Date manufactured: (None)
- Serial number:
- Park name:
- Space/Lot number:
- Date first sold: (None)
- Bill of sale vesting:
- Type of unit:** (highlighted with a red circle)
- Width (Inches):

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<i>Status Screen</i>			
New/Mod Mod	Requested By Karen Benelli / Sammy Simpson	Incident No.	TFS No.

The **Status** screen has been added in the **Sub Escrow** section.
This change is visible when the **My Screens > SoCal Sub Escrow Screens** screen is selected.



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PHRASE(S)

<i>Revised EI Phrase</i>							
New/Mod Change	Requested By	Incident No.	TFS No.				
	FNT CA		765759				
Text revised per approval from Settlement.							
SoCal:							
<table border="1"> <thead> <tr> <th>Code</th> <th>Name</th> </tr> </thead> <tbody> <tr> <td>stmnt01</td> <td>STATEMENT OF INFORMATION - SELLER/CAR CONTINGENCY WAIVER</td> </tr> </tbody> </table> <p>BEFORE</p> <p>STATEMENT OF INFORMATION: The Seller in the above referenced transaction has not provided a completed Statement of Information as previously called for under paragraph 13A of the Purchase Agreement. As such, Escrow Holder is instructed that transmittal of a completed Statement of Information to the title insurer is hereby waived.</p> <p>AFTER</p> <p>STATEMENT OF INFORMATION: The Seller in the above referenced transaction has not provided a completed Statement of Information as previously called for pursuant to the terms of the Purchase Agreement. As such, Escrow Holder is instructed to forward the Seller completed Statement of Information to title once received, if required.</p>				Code	Name	stmnt01	STATEMENT OF INFORMATION - SELLER/CAR CONTINGENCY WAIVER
Code	Name						
stmnt01	STATEMENT OF INFORMATION - SELLER/CAR CONTINGENCY WAIVER						
NoCal:							
<table border="1"> <thead> <tr> <th>Code</th> <th>Name</th> </tr> </thead> <tbody> <tr> <td>stmintf01</td> <td>STATEMENT OF INFORMATION</td> </tr> </tbody> </table> <p>BEFORE</p> <p>STATEMENT OF INFORMATION: The Seller in the above referenced transaction has not provided a completed Statement of Information as previously called for under paragraph 13A of the purchase agreement. As such, escrow holder is instructed that transmittal of a completed Statement of Information to the title insurer is hereby waived.</p> <p>AFTER</p> <p>STATEMENT OF INFORMATION: The Seller in the above referenced transaction has not provided a completed Statement of Information as previously called for pursuant to the terms of the Purchase Agreement. As such, Escrow Holder is instructed to forward the Seller completed Statement of Information to title once received, if required.</p>				Code	Name	stmintf01	STATEMENT OF INFORMATION
Code	Name						
stmintf01	STATEMENT OF INFORMATION						

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<i>Revised EI Phrase</i>							
New/Mod Change	Requested By	Incident No.	TFS No.				
	FNT LA/MC		763944				
Text revised.							
<table border="1"> <thead> <tr> <th>Code</th> <th>Name</th> </tr> </thead> <tbody> <tr> <td>releas01</td> <td>RELEASE FOR CONTINGENCIES</td> </tr> </tbody> </table> <p>RELEASE FOR CONTINGENCIES: By signature hereto, Buyer and Seller acknowledges and confirms that all contingencies of this Escrow have been met and are satisfied and released in their entirety, regardless of any time limits previously shown, including the investigation of subject property. Escrow Holder is authorized and instructed to proceed with the Close of Escrow without further approval or authorization pertaining to same.</p>				Code	Name	releas01	RELEASE FOR CONTINGENCIES
Code	Name						
releas01	RELEASE FOR CONTINGENCIES						

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REPORTS

Accidental Closed/Completed Orders			
New/Mod	Requested By	Incident No.	TFS No.
New	CT Santa Clara		763420
New Report for CT Santa Clara.			
Affected item(s): SSCORP5583.rpt - Accidental Closed/Completed Orders (New)			

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Binder Report			
New/Mod	Requested By	Incident No.	TFS No.
New	Config		763320
New Report for CA.			
Affected item(s): SSCORP5582.rpt - Binder Report (New)			

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Closing By Post Date			
New/Mod	Requested By	Incident No.	TFS No.
Change	FNT San Diego Admin		761513
<ol style="list-style-type: none"> 1. Removed END & SUB bill from being included with the Premiums and Split Premiums 2. Updated defaults for percentages in custom fields 3. Excluded files with Transaction Type of "Equity" 			
Affected item(s): Closing By Post Date			

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Data Download			
New/Mod	Requested By	Incident No.	TFS No.
Change	FNT San Diego Admin		761515
Included several updates to logic.			
Affected item(s): Data Download			

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Notary Fees			
New/Mod	Requested By	Incident No.	TFS No.
Troubleshooting	Config / CT NoCal		764024
Updated to exclude payments to contacts other than the A contact.			

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Openings by Marketing Rep w/Splits			
New/Mod	Requested By	Incident No.	TFS No.
Change	FNT San Diego Admin		763415
Included miscellaneous updates to logic and formatting			
Affected item(s): Openings by Marketing Rep w/Splits			

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COLORADO

DOCUMENTS

Escrow

<i>1099-S Substitute Form</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	FT CO		763329
Revised to prompt user to ask which properties to show if there is more than one entered in the file.			
Affected item(s): 1099-S Substitute Form			

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<i>Additional Escrow Charge Memo</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	Heritage Title	INC230166213	765708
Updated the General Rules date from "September 24, 2012" to "March 1, 2023".			
Affected item(s): Additional Escrow Charge Memo			

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<i>Affidavit (Scrivener's Error)</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	Colorado		765874
Updated contacts for the dropdown selections and added additional custom fields. Please render to view in full.			
Affected item(s): Affidavit (Scrivener's Error)			

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<i>Affidavit and Indemnity Agreement</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	FT CO		763286
Document has been revised to look to properties when rendering.			
Affected item(s): Affidavit and Indemnity Agreement			

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<i>Bill of Sale (Contract)</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	FT CO		763317
Document has been revised to look to properties when rendering.			
Affected item(s): Bill of Sale (Contract)			

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<i>Cashier's Check Request</i>									
New/Mod	Requested By	Incident No.	TFS No.						
Change	Chicago Title and Heritage Title		761396						
Updated so that both Chicago and Heritage Title also see the Pay To prompt with a dropdown list of contacts.									
<div style="border: 1px solid black; padding: 10px;"> <p style="text-align: center;">CHECK INFORMATION:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Check Amount:</td> <td>\$300.00</td> </tr> <tr> <td>Pay to the Order Of:</td> <td>Samuel S. Seller and Samantha S. Seller</td> </tr> <tr> <td>Memo:</td> <td>This is the check memo</td> </tr> </table> <div style="float: right; border: 1px solid gray; padding: 5px; margin-top: 10px;"> Pay to the order of: Seller Buyer Government Listing Agent Other Payoff Lender Seller Selling Agent </div> </div>				Check Amount:	\$300.00	Pay to the Order Of:	Samuel S. Seller and Samantha S. Seller	Memo:	This is the check memo
Check Amount:	\$300.00								
Pay to the Order Of:	Samuel S. Seller and Samantha S. Seller								
Memo:	This is the check memo								
Affected item(s): Cashier's Check Request									

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<i>Deed Prompt Update</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	Colorado		765866
Deeds have been revised to receive a warning prompt when the vesting field is blank for organizations and the interest field is blank for individuals. This affects all deeds.			

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<i>Deeds (4)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	FT CO		762295
Updated language for "by and between" and revised to pull from the mortgagee on the existing lien screen for the lender name.			
Affected item(s): Deed (General Warranty Assumption - Legal) Deed (General Warranty Assumption) Deed (Special Warranty Assumption - Legal) Deed (Special Warranty Assumption)			

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<i>DR1083</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	FT CO		763292
Document has been revised to look to properties when rendering.			
Affected item(s): DR1083			

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<i>Earnest Money Receipt</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	FT CO		763298
Document has been revised to look to properties when rendering.			
Affected item(s): Earnest Money Receipt			

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<i>FIRPTA Statement by Qualified Substitute</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	FT CO		763283
Document has been revised to look to properties when rendering.			
Affected item(s): FIRPTA Statement by Qualified Substitute			

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<i>Grand Valley Water Users Transfer Worksheet</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	FT CO	INC230154845	764541
Updated to reflect most recently provided version.			
Affected item(s): Grand Valley Water Users Transfer Worksheet			

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<i>Order Notes (CO)</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	FT CO		763619
Added new custom field prompt asking if the user would like to show all of the notes from the checklists. If that is checked then all notes will pull to the form; if it is not checked then another prompt with all of the notes will be available for users to select which note(s) to pull.			
ORDER NOTES MS CD 2022 CO			
ORDER NOTES as of: May 3, 2023 at 11:01 AM Esc. Officer: Joseph D Kirby Property: 100 Property Street, Unit 100A, Englewood, CO 80840			
<div style="border: 1px solid black; padding: 5px; display: inline-block;"> Order CD CO Test <input checked="" type="checkbox"/> Show all notes? </div>			
04/20/2023	Joseph D Kirby	This is a note associated with the Home Warranty Checklist Task.	
04/20/2023	Joseph D Kirby	This is a note associated with the Earnest Money Checklist Task.	
04/20/2023	Joseph D Kirby	This is a second note associated with the Earnest Money Checklist Task.	
Affected item(s): Order Notes (CO)			

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<i>Payoff Request</i>			
New/Mod Change	Requested By FT CO	Incident No.	TFS No. 764903
Phone and fax numbers have been removed from the upper right corner of the document.			
Affected item(s): Payoff Request			

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<i>Real Property Transfer Declaration (TD-1000)</i>			
New/Mod Change	Requested By FT CO	Incident No.	TFS No. 764910
For Fremont County properties, information will pull from the file to items 1-4.			
Affected item(s): Real Property Transfer Declaration (TD-1000)			

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<i>Short Sale Acknowledgment - Buyer</i>			
New/Mod Change	Requested By Settlement	Incident No. INC230151134	TFS No. 764907
Document has been removed from all systems.			
Affected item(s): Short Sale Acknowledgment - Buyer			

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<i>Tax Water and Assessment Agreements (2)</i>			
New/Mod Change	Requested By FT CO	Incident No.	TFS No. 763625
Revised Englewood Sewer Tap fee to \$900. Added options in dropdowns for "Sewer and Trash" and "Water and Trash". Updated the language for the "has not" scenario for the final billing dropdown.			
Affected item(s): Tax Water and Assessment Agreement Tax Water and Assessment Agreement (Legal)			

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<i>WireSafe Changes for Heritage Title (3)</i>			
New/Mod Change	Requested By Heritage Title	Incident No.	TFS No. 766463
Revised so that Account Name is static as "Heritage Title Company, Inc."			
Affected item(s): Wire Account Notification (NCS - Commercial) WireSafe Fraud Alert (eSign) WireSafe Fraud Alert with Wire Instructions (Lender Only) (CO)			

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INTEGRATIONS

<i>Pulse Person Lookup Table Sync</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>Resolved: The Pulse process was being terminated when the Fax attribute was empty. The process now continues to completion when the Fax attribute is empty</p> <p>Resolved: Error message displayed when importing a person to a Person Lookup Table that did not contain a Company Name column. Import process continues to completion now when Company Name column not found.</p>			

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<i>Rate Validation Tool</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>Configuration changes to write back escrow product (DocumentPreparation) charge to Select Rate Services screen.</p>			

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<i>ValueCheck LinkIt</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>Resolved: An "illegal token" error displayed when importing ValueCheck data containing requirements/exceptions text with links to documents stored in smartview.</p>			

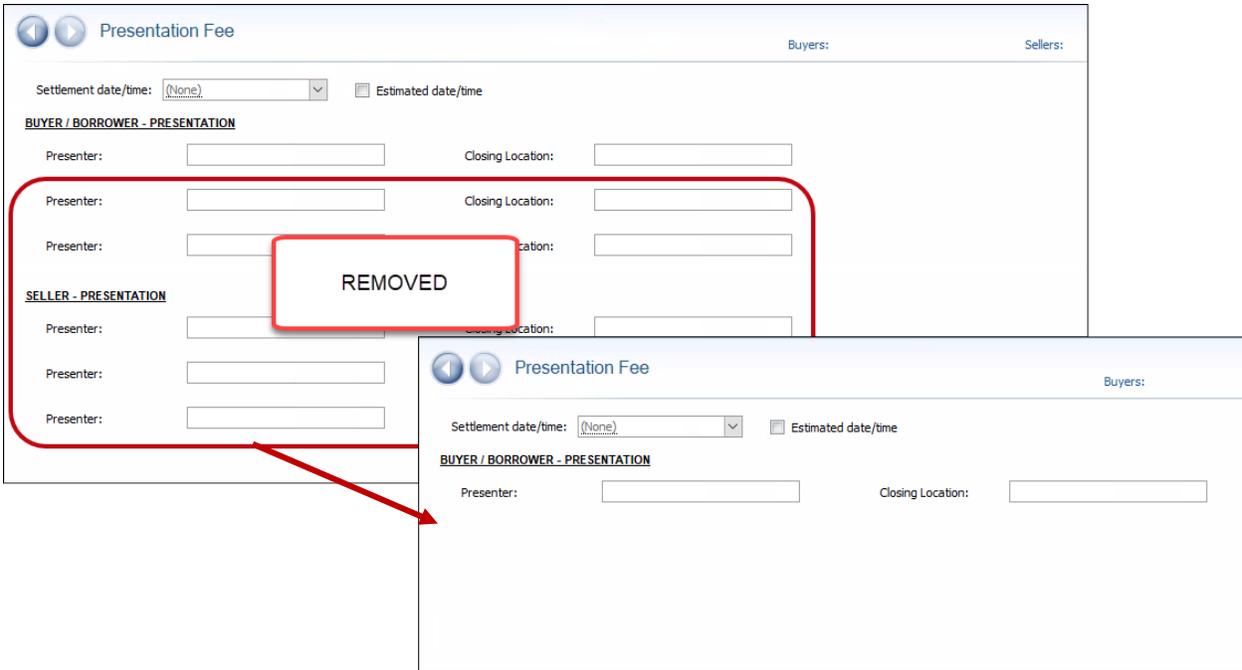
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MY SCREENS

Presentation Fee Screen

New/Mod Mod	Requested By Tina LeMieux	Incident No.	TFS No.
-----------------------	-------------------------------------	---------------------	----------------

All unnecessary custom fields removed from the **Presentation Fee** screen.
 This change is visible when the **My Screens > CO-Escrow-FNT** screen is selected.



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REPORTS

Revenue from Prior Quarters (HTC)			
New/Mod Change	Requested By HTC CO	Incident No.	TFS No. 756372
Updated formatting to make Select report match Impact version.			
Affected item(s): Revenue From Previous Quarters (HTC)			

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DISTRICT OF COLUMBIA

DOCUMENTS

Escrow

<i>Wire Account Notification (NCS - Commercial)</i>			
New/Mod Change	Requested By CT DC	Incident No.	TFS No. 762189
Updated to look to the Credit Account Name field for the branding.			
Affected item(s): Wire Account Notification (NCS - Commercial)			

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HAWAII

DOCUMENTS

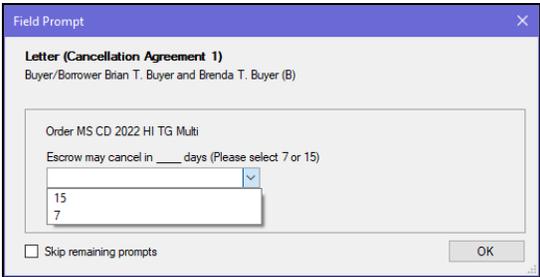
Escrow

<i>General Provisions</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	FT HI		764170
Added "SIGNATORY OF DOCUMENTS" paragraph for FT HI.			

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<i>General Provisions (TG)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	Title Guaranty		762279
Updated Title Guaranty's version to correct 29. LIMITED ENGLISH PROFICIENCY to #30.			

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<i>Letter (Cancellation Agreement 1)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	Title Guaranty		762277
Added new custom field dropdown to select when escrow may cancel.			
			
<p>Please be advised that if we do not hear from you within fifteen (15) days of the mailing of this letter, we may cancel this escrow and disburse all funds. If there are any mitigating circumstances that need to be brought to our attention as to why this escrow should not be canceled and disbursement made of all funds as shown, please contact us immediately in writing and indicate the reason cancellation should not take place.</p>			
<p>Affected item(s): Letter (Cancellation Agreement 1)</p>			

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<i>Letter (Cancellation Refund)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	Title Guaranty		762275
Renamed document to "Letter (Final Cancellation)".			
<p>Affected item(s): Letter (Final Cancellation)</p>			

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<i>Letter (Final HARPTA Withholding Payment)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	Title Guaranty		766438
Updated to refer to the N-288A copy for the enclosure.			
<p>Affected item(s): Letter (Final HARPTA Withholding Payment)</p>			

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<i>Letter (HOA Closing - HI)</i>			
New/Mod Change	Requested By FT HI	Incident No.	TFS No. 763628
Added "BUYER FIRST USE YEAR:" to form for "FHI-019T" Settlement Agent and Timeshares.			
Affected item(s): Letter (HOA Closing - HI)			

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<i>Letter (Title Endorsement Transmittal)</i>			
New/Mod Change	Requested By Title Guaranty	Incident No.	TFS No. 764203
New document. Please render to view in full.			
			
Affected item(s): HID1440.doc - Letter (Title Endorsement Transmittal) (New)			

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<i>Letters (3)</i>			
New/Mod Change	Requested By Title Guaranty	Incident No.	TFS No. 762626
Added custom field prompt for signature section and adjusted to allow users to choose which properties to reflect.			
Affected item(s): Letter (Form B – No Construction) Letter (Form B.1 - No Construction - Leasehold) Letter (Form D.1 - Parties in Possession)			

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INTEGRATIONS

<i>Person Lookup Table Sync</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>Updates:</p> <ul style="list-style-type: none"> > Company address updated in Pulse, the address for all people associated to the Company are updated in the Person Lookup Table. > Company (primary) Phone/Fax is updated in the Person Lookup Table, the Company's phone and fax number are updated if the Customer's applicable field is empty. > Customer Notes now pulls from the separate Notes events (not from the contactinfo.note field). > When a <null> or <empty> value for a Company is sent from Pulse, that field will be set to <empty> in the Lookup Table. > The Customer\Type\Name value in Pulse now writes and is converted to the Select .Parent.ContactTypeDescription column in the Person Lookup Table using the mapping below <ul style="list-style-type: none"> » Real Estate Agent = Listing Agent/Broker, Selling Agent/Broker » Builder = Builder » Title Company = Title Company > When a Customer is sent over from Pulse as Disabled, the Person is removed from the Select Lookup Table. <p>Resolved: The Pulse process was being terminated when the Fax attribute was empty. The process now continues to completion when the Fax attribute is empty</p> <p>Resolved: Error message displayed when importing a person to a Person Lookup Table that did not contain a Company Name column. Import process continues to completion now when Company Name column not found.</p>			

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IDAHO

DOCUMENTS

Escrow

<i>El - Supplemental Seller Financing</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	Idaho		762071
Revised to pull in phrases from "Note" Escrow Instruction types.			
<p>In the event of a conflict between these supplemental Escrow Instructions and the instructions contained in the original Escrow named hereinabove, the instructions contained herein shall prevail.</p> <ol style="list-style-type: none"> You are instructed to prepare a Promissory Note and Deed of Trust to be executed by Bryan B. Buyer and Brenda B. Buyer in favor of Loans Unlimited in the amount of Four Hundred Fifty Thousand And No/100 Dollars (\$450,000.00) with interest at the rate of _____ Percent (____%) per annum beginning on January 20, 2023, with monthly payments in the amount of _____ Dollars (\$_____), beginning on March 1, 2023 and continuing monthly, due on or before the same day of each and every month until the full sum of principal and any interest owing has been fully paid. The full sum of principal and interest shall be due on or before February 1, 2053. This is a Note phrase from my Escrow Instruction THE PARTIES ADVISE ESCROW HOLDER THAT IT IS THEIR INTENTION THAT NO ALTA EXTENDED OR STANDARD LOAN POLICY BE ISSUED AT CLOSING. 			
<p>Affected item(s): El - Supplemental Seller Financing</p>			

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<i>Homeowner Exemption - Ada County</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	Idaho		762065
Updated to reflect most recent version.			
<p>Affected item(s): Homeowner Exemption - Ada County</p>			

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<i>Note (Secured by Deed of Trust)</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	Idaho		762181
Revised to pull in phrases from "Note" Escrow Instruction types.			
<p>If any installment or portion thereof, due hereunder, is not received by the holder of this Note within _____ (____) days after the due date thereof, Maker agrees to pay to Payee, in addition to the regular monthly payment, a late payment fee of _____ Dollars (\$_____).</p> <p>This is a Note phrase from my Escrow Instruction</p> <p>Principal and interest to be paid as follows:</p> <p>Unless otherwise specified hereinabove; each payment shall be credited first on interest then due and the remainder on principal; and interest shall thereupon cease upon the principal so credited.</p>			
<p>Affected item(s): Note (Secured by Deed of Trust)</p>			

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ILLINOIS

DOCUMENTS

Escrow

<i>Escrow Trust Instructions (Strict Joint Order #1 - Resi EM Under \$200K)</i>			
New/Mod Change	Requested By CT Metro	Incident No.	TFS No. 762268
Added "Proposed Disbursement Date" at top right below the "Date" field. Added "Expiration Date" to pull from the "Disbursement Date" field in the file.			
Affected item(s): Escrow Trust Instructions (Strict Joint Order #1 - Resi EM Under \$200K)			

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<i>Escrow Trust Instructions (Strict Joint Order #3 - Mobile Earnest Money)</i>			
New/Mod Change	Requested By CT Metro	Incident No.	TFS No. 762272
Added "Proposed Disbursement Date" at top right below the "Date" field. Added "Expiration Date" to pull from the "Disbursement Date" field in the file.			
Affected item(s): Escrow Trust Instructions (Strict Joint Order #3 - Mobile Earnest Money)			

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<i>Stop Payment/Check Copy Request - OAC</i>			
New/Mod Change	Requested By Monica Smith	Incident No. INC230147210	TFS No. 764668
Previous changes have been reverted. This form will again give the user the option to select from any posted check.			
Affected item(s): Stop Payment/Check Copy Request - OAC			

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INDIANA

DOCUMENTS

Escrow

<i>Affidavit (Life Tenant)</i>			
New/Mod Change	Requested By MidWest IT	Incident No.	TFS No. 764165
Added new language regarding the attorney redacting social security numbers.			
Affected item(s): Affidavit (Life Tenant)			

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<i>Commercial Escrow Agreement</i>			
New/Mod Change	Requested By FT IN	Incident No.	TFS No. 764914
Added ability for users to choose signatory for Escrow Agent.			
Affected item(s): Commercial Escrow Agreement			

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<i>Deed (Special Warranty - HUD)</i>			
New/Mod Change	Requested By MidWest IT	Incident No.	TFS No. 762773
Added "Raine & Company, LLC" to the custom field dropdown selection for the Asset Manager.			
Affected item(s): Deed (Special Warranty - HUD)			

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<i>Post Closing Document Delivery</i>			
New/Mod Change	Requested By FT IN	Incident No. INC230155220	TFS No. 764708
Document now pulls information to the signature section.			
Affected item(s): Post Closing Document Delivery			

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MICHIGAN

DOCUMENTS

Escrow

Affidavit (Affixture of Manufactured Home)			
New/Mod Change	Requested By CT MI	Incident No.	TFS No. 762304
Updated to reflect most recent version. Please render to view in full.			
Affected item(s): Affidavit (Affixture of Manufactured Home)			

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Residential Construction Indemnification			
New/Mod New	Requested By CT MI	Incident No.	TFS No. 764174

New document. Please render to view in full.



Company Name

**INDEMNITY AGREEMENT
(Residential Construction)**

THIS INDEMNITY AGREEMENT (this "Agreement") is executed as of May 1, 2023 by [Bryan B. Buyer and Brenda B. Buyer](#) (the "INDEMNITOR") for the benefit of the [Underwriter Name](#), its policy issuing agents and affiliated title companies (the "COMPANY").

WHEREAS, the Company has issued its Commitment No. [COM111111](#) with respect to real property located in the County of [Clark](#), and State of [Michigan](#) as more particularly described therein (the "Property"), and has raised as an exception or exceptions a certain defect, encumbrance, adverse claim or other matter affecting the Property (hereinafter the "Identified Risk"), described as follows:

- [Lack of a right of access to and from the land.](#)

WHEREAS, the Company has been requested to issue its title insurance policy, or may in the future be requested to issue a title insurance policy, date down endorsement, commitment, hold harmless or indemnity letters to induce other title insurance companies to issue title insurance policies or commitments (such title insurance policy, date down endorsement, commitment or hold harmless or indemnity letters to induce other title insurance companies to issue title insurance policies or commitments shall hereinafter be referred to collectively as the "Title Insurance Policy") with respect to the Property or some portion thereof, or estates or interests therein, either without taking exception for the Identified Risk or insuring against loss or damage by reason thereof; and

WHEREAS, the Indemnitor has agreed to execute this Agreement in order to induce the Company to issue the Title Insurance Policy or future policies or commitments insuring against loss or damage by reason of the Identified Risk.

Affected item(s):
MID1360.doc - Residential Construction Indemnification (New)

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REPORTS

Escrow

<i>Transaction Form</i>			
New/Mod Change	Requested By MW IT	Incident No.	TFS No. 761511
Removed the "Notice of Opportunity..." paragraph for FT Michigan only.			
<u>Affected item(s):</u> Transaction Form			

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MINNESOTA

DOCUMENTS

Escrow

<i>Distribution List</i>			
New/Mod Change	Requested By MN	Incident No.	TFS No. 762293
Updated to remove fax numbers for buyers/sellers.			
Affected item(s): Distribution List			

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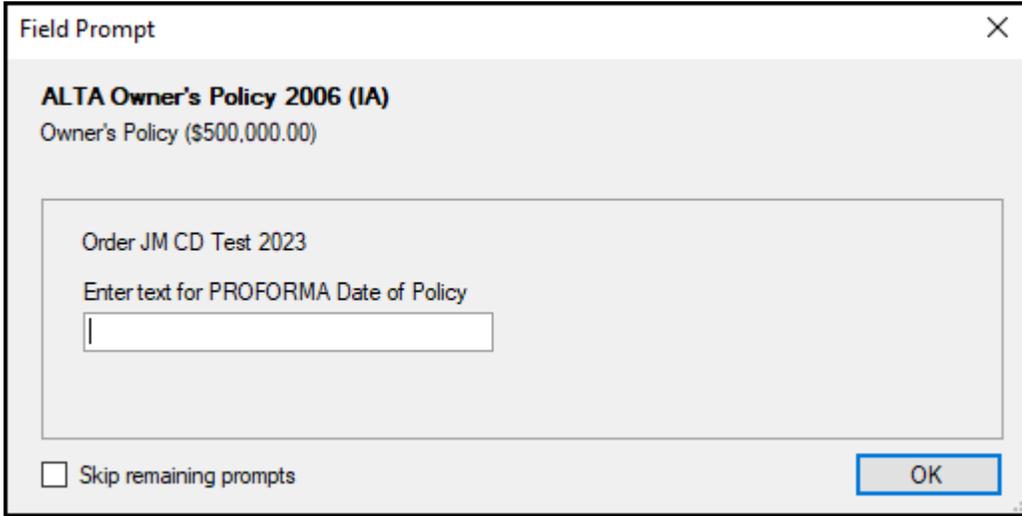
<i>Order Confirmation</i>			
New/Mod Change	Requested By MN	Incident No.	TFS No. 762290
Updated to remove fax numbers for buyers/sellers and added prompt asking if the legal should print.			
Affected item(s): Order Confirmation			

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<i>Supplemental Commitment</i>			
New/Mod Change	Requested By Commercial Partners Title	Incident No.	TFS No. 762288
Revised "changes" to reflect "change(s)".			
<div style="border: 2px solid black; padding: 10px; margin: 10px auto; width: 80%;"> <p style="text-align: center; font-weight: bold; font-size: 1.2em;">SUPPLEMENTAL COMMITMENT</p> <p>File No.: MS CD Test MN</p> <p>Issued On: April 20, 2023</p> <p>This 232 Supplemental Commitment has been issued to reflect the following change(s):</p> </div>			
Affected item(s): Supplemental Commitment			

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Title

<i>Title Products revised to prompt for PROFORMA text</i>			
New/Mod Change	Requested By Minnesota\FMIN	Incident No.	TFS No. 765394, 765395, 765396, 765398
<p>PROFORMA Title Products for Iowa, North Dakota, South Dakota, and Wisconsin have been revised for "Minnesota\FMIN" profiles to prompt for text to be entered.</p> <div data-bbox="295 466 1317 982" data-label="Image">  </div>			

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NEBRASKA

DOCUMENTS

Title

<i>Special Exceptions on 2021 Title Products</i>			
New/Mod Change	Requested By Dave Blomquist	Incident No. INC230148157	TFS No. 764950
<p>Per Nebraska counsel, the "Special Exceptions" header and verbiage have been removed from the end of the Exception list. Instead, it is to be placed between the standard and Special Exceptions on the 2021 title products. Document changes are coordinated with Template changes for the correct placement. Additionally, users will receive a warning if they do not have the Special Exceptions header in their order.</p> <p>Affected item(s): ALTA Commitment 2021 (KS MO NE) ALTA Loan Policy 2021 (KS MO NE) ALTA Owner's Policy 2021 (KS MO NE) Master Commitment Master Commitment with Privacy Notice Master Loan Policy Master Owner's Policy</p>			

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NEVADA

REPORTS

Aggregate Recording Charge Worksheet			
New/Mod Change	Requested By CT Nevada Escrow Admin	Incident No.	TFS No. 763841
Updated to include RED bill code with RCF for Aggregate Recording Charges.			
Affected item(s): Aggregate Recording Charge Worksheet			

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NEW JERSEY

DOCUMENTS

Escrow

ALTA 33 Notice			
New/Mod New	Requested By CT NJ	Incident No.	TFS No. 765717
New document. Please render to view in full.			
<p>Escrow and Acknowledgment of Future Payment Related to Post Closing Title Rundowns and Issuance of ALTA 33-06 Disbursement Endorsements</p> <p>Title No.: CommitmentNo1111 Transaction: 100 Property Avenue, Property City, NJ 5555</p> <p>The following language (the Pending Disbursement Clause) appears in the Loan Policy to be issued by the Underwriter to the Lender:</p> <p>Since the proceeds of the mortgage to be insured will not be fully disbursed at closing, the following requirements must be complied with:</p> <ul style="list-style-type: none"> (a) Pending disbursement of the full proceeds of the loan secured by the mortgage insured, this policy insures only to the extent of the amount actually disbursed, but increases as each disbursement is made in good faith and without actual knowledge of any intervening liens or interests, for the payment of construction costs, up to the face amount of the policy. At the time of each disbursement of the proceeds of the loan, the title examination must be continued down to date for possible liens, including Notices of Unpaid Balance and Construction Lien Claims, and other matters, intervening between the date hereof and the date of such disbursement. Each disbursement subsequent to the date of the recording of the insured mortgage will be insured by issuance of an ALTA 33-06 Disbursement Endorsement (NJ Variation). (b) Notices of Unpaid Balance, Construction Lien Claims and other liens or interests must be discharged or released of record, or subordinated to the lien of the mortgage insured or disposed of to the satisfaction of the Company prior to each disbursement of the loan proceeds. (c) This Company's form of Owner's Affidavit as to the payment of the proceeds of each disbursement must be submitted prior to certification as to each disbursement of loan proceeds (copy attached). 			
Affected item(s): NJD1125.doc - ALTA 33 Notice (New)			

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Confirmation of Order			
New/Mod Change	Requested By CT NJ	Incident No.	TFS No. 763632
Added Qualifier between Block/Lot.			
Affected item(s): Confirmation of Order			

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NEW MEXICO

DOCUMENTS

Escrow

<i>Affidavit (Spouses as to Sole and Separate Property)</i>			
New/Mod Change	Requested By FT NM	Incident No.	TFS No. 765881
Revised the parties that pull to the document. Please render to view in full.			
Affected item(s): Affidavit (Spouses as to Sole and Separate Property)			

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<i>Agreement (Sole and Separate)</i>			
New/Mod Change	Requested By FT NM	Incident No. INC230101972	TFS No. 762241
Updated to reflect the most recently provided version. Please render to view in full.			
Affected item(s): Agreement (Sole and Separate) Agreement (Sole and Separate) Letter			

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INTEGRATIONS

<i>Pulse Person Lookup Table Sync</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>Resolved: The Pulse process was being terminated when the Fax attribute was empty. The process now continues to completion when the Fax attribute is empty</p> <p>Resolved: Error message displayed when importing a person to a Person Lookup Table that did not contain a Company Name column. Import process continues to completion now when Company Name column not found.</p>			

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<i>ValueCheck LinkIt</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>Resolved: An "illegal token" error displayed when importing ValueCheck data containing requirements/exceptions text with links to documents stored in smartview.</p>			

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NEW YORK

DOCUMENTS

Escrow

<i>Municipal Group Service Order Results</i>			
New/Mod Change	Requested By FT Riverhead	Incident No.	TFS No. 762261
Various changes made based on the contact chosen at rendering. Please render to view in full.			
Affected item(s): Municipal Group Service Order Results			

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NORTH CAROLINA

REPORTS

Starters Report			
New/Mod New	Requested By FNT NC/Config	Incident No.	TFS No. 760286
New Report or FNT NC. Affected item(s): SSCORP5581.rpt_Starters Report (New)			

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OHIO

DOCUMENTS

Escrow

Affidavit (MI - Commercial Owner's)			
New/Mod Change	Requested By State Counsel	Incident No.	TFS No. 762557
Updated to pull the entity as well as person.			
Affected item(s): Affidavit (MI - Commercial Owner's)			

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Affiliated Business Arrangement Disclosure Statement			
New/Mod New	Requested By CT OH	Incident No.	TFS No. 762286

New document. Please render to view in full.

AFFILIATED BUSINESS ARRANGEMENT DISCLOSURE STATEMENT

TO: _____
(Buyer, Seller or Borrower)

PROPERTY: [100 Property Avenue, Property City, OH 55555](#)

FROM: _____ DATE: _____
(Party making referral; hereinafter referred to as "Referrer")

We are pleased to refer you to ACT Title Agency, LLC and Chicago Title Company, LLC for title and/or closing services. ACT Title Agency, LLC is a title insurance policy issuing agent of Chicago Title Insurance Company ("CTIC"). Chicago Title Company, LLC is the Manager of ACT Title Agency, LLC and is an affiliate of CTIC.

PLEASE NOTE that the above referenced Referrer has a business relationship with ACT Title Agency, LLC and has a minority ownership interest in ACT Investors, LLC. ACT Investors, LLC has a Forty-Nine Percent (49%) direct ownership interest in ACT Title Agency, LLC. Executive Title Agency Corp., an affiliate of CTIC and Chicago Title Company, LLC, has a Fifty-One Percent (51%) direct ownership interest in ACT Title Agency, LLC. Because of these relationships, this referral may provide Referrer a financial or other benefit.

Below are the estimated range of charges for settlement services by ACT Title Agency, LLC and/or Chicago Title Company, LLC:

Amount of Title Insurance Coverage for Owners Policy	Premium per \$1,000 of Contract Sales Price	Escrow / Service Fee	Conveyance Fee (Transfer Tax)
Up to \$150,000	\$5.75 / \$1,000	\$740 - \$980 each to	\$3.00 - \$4.00 per \$1,000
Over \$150,000 up to \$250,000	Flat fee of \$187.50 + \$4.50/\$1,000	Purchaser and	Per Contract Sales Price
Over \$250,000 up to \$500,000	Flat fee of \$437.50 + \$3.50/\$1,000	Seller depending on	(Rounded to the nearest
Over \$500,000 up to \$10,000,000	Flat fee of \$812.50 + \$2.75/\$1,000	purchase price and county	\$100) Depending on county
Over \$10,000,000	Flat fee of \$812.50 + \$2.25/\$1,000	location of property	location of property
Minimum Charge	\$175		

Charges to Purchaser	Charges to Seller
1/2 of Owner's Title Insurance	per schedule above
Escrow / Service Fee	per schedule above
1/2 Title Insurance Binder	\$37.50
Lender's Coverage (simultaneous issue)	\$100
Closing Protection Coverage for Buyer	\$0-\$40
Closing Protection Coverage for Lender	\$0-\$40
Endorsements as required by Lender	\$50-\$500
Survey Coverage	\$100
1/2 of Owner's Title Insurance	per schedule above
Escrow / Service Fee	per schedule above
1/2 Title Insurance Binder	\$37.50
Conveyance Fee (Transfer Tax)	per schedule above
Closing Protection Coverage for Seller	\$55

NOTE: There may be additional charges depending on the particular needs of your transaction.

Affected item(s):
OHD1460.doc - Affiliated Business Arrangement Disclosure Statement (New)

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<i>File Cover CTT</i>			
New/Mod Change	Requested By CT OH	Incident No. INC230136806	TFS No. 762755
Updated so that the people associated with a buyer/borrower or seller entity will pull to the form.			
Affected item(s): File Cover CTT			

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<i>Final Water Hold Instructions</i>			
New/Mod Change	Requested By CT OH	Incident No. INC230159248	TFS No. 765346
Added sellers' names/forwarding address/phone number to 'Please forward escrow holdback refund to' section.			
Affected item(s): Final Water Hold Instructions			

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OKLAHOMA

DOCUMENTS

Escrow

<i>Disputed Funds-Interplead Letter</i>			
New/Mod Change	Requested By CT OK	Incident No.	TFS No. 765335
Updated to show deposit amount.			
Affected item(s): Disputed Funds-Interplead Letter			

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OREGON

DOCUMENTS

Escrow

<i>Letter (Beneficiary Statement - Private)</i>			
New/Mod Change	Requested By Ticor Title	Incident No.	TFS No. 763051
Added a prompt asking whether to include the cover letter.			
Affected item(s): Letter (Beneficiary Statement - Private)			

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PENNSYLVANIA

DOCUMENTS

Escrow

<i>Escrow Deposit Agreement</i>			
New/Mod Change	Requested By NCS Philly	Incident No.	TFS No. 765871
Added invested in bank name.			
<p>WHEREAS, Stephen T. Seller and Stephanie T. Seller ("Seller") by (the "Agreement") dated the _____, has agreed to sell unto Brian T. Buyer and Brenda T. Buyer ("Buyer") those premises commonly described as 5185 W. Sharlyn Hill Circle, Unit 100A, Anytown, PA 99999, for the consideration therein stated, a copy of which Agreement is made a part hereof.</p> <p>AND Buyer and Seller have requested Chicago Title Insurance Company ("Company") to receive a(n) initial deposit of Five Hundred And No/100 Dollars (\$500.00) [and any additional and/or subsequent deposits pursuant to the Agreement] to be held in escrow in an account held at TestTrust or, if invested, City National Bank (the "Bank") (all such deposits being referred to collectively herein as the "Fund"). Company agrees to hold the Fund in accordance with the terms and provisions of the Agreement, subject to the following:</p> <p>IT IS UNDERSTOOD and agreed that the Company is an Escrow Holder only, is merely responsible for the</p>			
Affected item(s): Escrow Deposit Agreement			

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TEXAS

DOCUMENTS

Escrow

<i>Affidavit (Tax Statement)</i>			
New/Mod Change	Requested By Elise Kitchens	Incident No.	TFS No. 765153
This document has been removed.			
Affected item(s): Affidavit (Tax Statement) Affidavit (Tax Statement)			

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<i>Wire Fraud Checklist (Baker Firm)</i>			
New/Mod New	Requested By FNT Dallas	Incident No.	TFS No. 764928

New document, please render to view in full.

GF #: CD Test OK-SLM

Both Sender and Approver need to stay vigilant for signs of "RED FLAG S"
If something does not seem right, TRU ST YOUR INSTINCTS AND CONTACT YOUR MANAGER.

SENDER CHECKLIST

Have you received revised or updated wiring instructions? This includes ALL updated payoffs. Yes No

Have the revised or updated wiring instructions been reviewed by a Supervisor? Yes No

} If YES, NOTIFY MANAGER IMMEDIATELY!

SIGN ATURE MANAGER APPROVAL

If the answer to the above is NO, or have manager's approval, verify the following for ALL WIRES:

TYPE OF WIRE	
<input type="checkbox"/> Seller Proceeds	<input type="checkbox"/> Buyer Refund
<input type="checkbox"/> Realtor/Broker Commission	<input type="checkbox"/> Attorney Fees
<input type="checkbox"/> Release of Independent Cons./Option	<input type="checkbox"/> Release of Earnest Money
<input type="checkbox"/> Lender Fees/Mortgage Broker	<input type="checkbox"/> Other: _____
<input type="checkbox"/> Payoff Review Payoff Letter: <input type="checkbox"/> If received updated payoff, compare payoffs to each other (check wiring instructions) <input type="checkbox"/> address matches property address in Softpro <input type="checkbox"/> parties match	

Affected item(s):
SSTXD00299.doc - Wire Fraud Checklist (Baker Firm) (New)

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REPORTS

SWACS Order Report			
New/Mod Change	Requested By SW Agency Admin	Incident No.	TFS No. 762659
Updated the "Title Work" column to show the T3 and added "Closed Date" column and MS File Number.			
Affected item(s): SWACS Order Report			

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UTAH

DOCUMENTS

Escrow

El - Lender's Private Loan

New/Mod New	Requested By FT UT	Incident No.	TFS No. 762191
-----------------------	------------------------------	---------------------	--------------------------

New document. Please render to view in full.



Company Name

LENDER ESCROW INSTRUCTIONS

<p>Melissa G Smith, Closing Specialist Escrow Office Name 100 Escrow Office Street EO City, UT 54545 Phone: (800)777-4444 Fax: (800)444-7777</p>	<p>Date: April 12, 2023 Escrow No.: JM CD Test 2023-MGS Borrower(s): Bryan B. Buyer and Brenda B. Buyer Seller(s): Samuel S. Seller and Samantha S. Seller Property: 100 Property Avenue Property City, UT 55555</p>
--	--

I/We hand you herewith:

- Approved copy of Note and Deed of Trust
- Approved copy of Preliminary Report
- Loan funds in the form of wire transfer, certified check, cashier's check, or teller's check payable to **Escrow Office Name** pursuant to the "Deposit of Funds," Paragraph 4 contained in the General Provisions attached hereto and made a part hereof

which you are authorized to deliver and/or record when;

You hold for my account the following:

- Original, executed promissory note corresponding to the above referenced copy, with interest commencing at _____ Percent (_____%), first payment beginning **March 1, 2023**, with all principal and accrued interest due in its entirety on **February 1, 2053**.

Affected item(s):

UTD1119.doc - El - Lender's Private Loan (New)

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INTEGRATIONS

<i>Pulse Person Lookup Table Sync</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>Resolved: The Pulse process was being terminated when the Fax attribute was empty. The process now continues to completion when the Fax attribute is empty</p> <p>Resolved: Error message displayed when importing a person to a Person Lookup Table that did not contain a Company Name column. Import process continues to completion now when Company Name column not found.</p>			

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<i>Rate Validation Tool</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>Configuration changes to add support for,</p> <ul style="list-style-type: none"> - UTCT-05-Refinance Rate Expanded Loan - UTCW-05-Refinance Rate Expanded Loan - UTFT-05-Refinance Rate Expanded Loan 			

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WASHINGTON

DOCUMENTS

Escrow

Bill of Sale (LPB 30) (2)			
New/Mod Change	Requested By CT Kennewick	Incident No.	TFS No. 766212
Removed the notary acknowledgment.			
Affected item(s): Bill of Sale (LPB 30) Bill of Sale (LPB 30) Letter			

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Master Real Estate Excise Tax Affidavit - Exempt (2023)			
New/Mod Change	Requested By WA	Incident No.	TFS No. 762619
Added prompts for item 6.			
<div style="border: 1px solid black; padding: 5px;"> <p>6 Is this property designated as forest land per RCW 84.33? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> Property designated as forest land?</p> <p>Is this property classified as current use (open space, farm and agricultural, or timber) land per RCW 84.34? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Property classified as current use?</p> <p>Is this property receiving special valuation as historical property per RCW 84.26? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> Property receiving special valuation as historical property?</p> </div>			
Affected item(s): Master Real Estate Excise Tax Affidavit - Exempt (2023)			

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Personal Representative Deed (LPB 74) (2)			
New/Mod Change	Requested By WA	Incident No.	TFS No. 764167
Updated title.			
<div style="border: 1px solid black; padding: 10px;"> <p>Filed for record at the request of:</p> <p> Fidelity National Title</p> <p>236 Quarry Road Greenville, WA 99999</p> <p>Escrow No.: MS CD 2022 WA</p> <p style="text-align: center;">PERSONAL REPRESENTATIVE DEED (Bargain and Sale Deed - RCW 64.04.040)</p> <p>THE GRANTOR(S) Grantor 1 Name and Grantor 2 Name from Deed screen for and in consideration of</p> </div>			
Affected item(s): Personal Representative Deed (LPB 74) Personal Representative Deed (LPB 74) Letter			

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<i>Subordination Agreement (General Contractor)</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	WA		764710
Updated to reflect most recent version. Please render to view in full.			
Affected item(s): Subordination Agreement (General Contractor)			

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<i>Subordination Agreement (Independent Contractor)</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	WA		764714
Updated to reflect most recent version. Please render to view in full.			
Affected item(s): Subordination Agreement (Independent Contractor)			

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<i>Subordination Agreement (Subcontractor)</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	WA		764712
Updated to reflect most recent version. Please render to view in full.			
Affected item(s): Subordination Agreement (Subcontractor)			

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<i>Supplemental Report</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	CT Seattle/NCS		762751
Updated the Title Company email to first look to the Examiner's email to pull and if that is empty it will continue to pull the office email.			
Affected item(s): Supplemental Report			

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PHRASE(S)

<i>New EI Phrase</i>							
New/Mod New	Requested By Penny Hoskins	Incident No.	TFS No. 761555				
New Phrase:							
<table border="1"> <thead> <tr> <th>Code</th> <th>Name</th> </tr> </thead> <tbody> <tr> <td>holdbk04</td> <td>HOLDBACK FOR TAX PAYMENT (SELLER)</td> </tr> </tbody> </table>		Code	Name	holdbk04	HOLDBACK FOR TAX PAYMENT (SELLER)	<p>If PROMPT 2 = "1st" will pull April 30th If PROMPT 2 = "2nd" will pull October 31st</p>	
Code	Name						
holdbk04	HOLDBACK FOR TAX PAYMENT (SELLER)						
<p>HOLDBACK FOR TAX PAYMENT: Escrow Office Name is hereby instructed to holdback the sum of Two Thousand Eight Hundred And No/100 Dollars (\$2,800.00) from Seller proceeds for payment of the 1st half of the 2023 property taxes. Said amount is to be held until such time as the county has posted the tax payment or April 30th - whichever comes first. If the tax payment has not posted by April 30th, Escrow Office Name is instructed to disburse the tax payment to the tax collector with no further responsibility or liability.</p>							

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WISCONSIN

DOCUMENTS

Escrow

Escrow Trust Instructions (Strict Joint Order #5)			
New/Mod Change	Requested By CT WI	Incident No. INC230117572	TFS No. 762760
Updated for WI operations to reflect "Wisconsin" and remove the IL statute.			
Affected item(s): Escrow Trust Instructions (Strict Joint Order #5)			

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Letter Report (Search)			
New/Mod New	Requested By FT WI	Incident No. INC230153379	TFS No. 764700

New document. Please render to view in full.



Fidelity National Title*
Insurance Company

1001 Title Way, Suite 100
Title City, WI 99999
Phone: (800)777-2468 / Fax: (800)777-8642

REPORT OF SEARCH

Order No.: [MS CD 2022 WI FT-CNW](#)
Prepared For: [The Mortgage Company](#)

Current Owner Limited Search:
Effective Date: [March 27, 2023 at 06:00 AM](#)

Names of Grantees in Last Deed of Record:
[Megan and Jennifer Seller](#)

For APN/Parcel ID(s): [11111111APN](#), [1A1A1A1APN](#), [11111111TAX](#) and [1A1A1A1TAX](#)

Legal Description:
SEE EXHIBIT "A" ATTACHED HERETO AND MADE A PART HEREOF
[100 Property Street, Unit 100A, Sheboygan, WI 53081](#)

Real Estate Mortgages, Leases, Docketed Judgments, State and Federal Tax Liens, and/or Construction Liens Appearing Against the Grantee(s) in the Latest Recorded Conveyance:

1. [This is a Commitment Exception.](#)
2. [This is a Commitment Exception containing a hyperlink to Google.](#)

Dated: [April 27, 2023](#)

[FIDELITY NATIONAL TITLE OF WISCONSIN](#)



Authorized Signature

Affected item(s):
WID0310.doc - Letter Report (Search) (New)

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FIRST TITLE OF GEORGIA

DOCUMENTS

Escrow

<i>IBA Authorization (ATL)</i>			
New/Mod Change	Requested By NCS First Title	Incident No.	TFS No. 765714
Updated 2.00bps to 4.40bps.			
Affected item(s): IBA Authorization (ATL)			

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NOVARE NATIONAL SETTLEMENT SERVICES

DOCUMENTS

Escrow

<i>Clarification of Commission</i>			
<i>Commission Clarification-Disbursement Instructions</i>			
New/Mod Change	Requested By Novare	Incident No. INC230161480	TFS No. 765368
Document will pull in the commission even if it is \$0.00.			
Affected item(s): Clarification of Commission Commission Clarification-Disbursement Instructions			

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<i>Letter (Thank You For Your Business)</i>			
New/Mod Change	Requested By Novare	Incident No. INC230123511	TFS No. 762257
Hard coded the address in the header.			
Affected item(s): Letter (Thank You For Your Business)			

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<i>Loan Information Sheet (Commercial)</i>			
New/Mod Change	Requested By Novare	Incident No.	TFS No. 764925
Users will now have the ability to choose their buyer/borrower or seller signatures.			
Affected item(s): Loan Information Sheet (Commercial)			

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INTEGRATIONS

<i>Pulse Person Lookup Table Sync</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>Resolved: The Pulse process was being terminated when the Fax attribute was empty. The process now continues to completion when the Fax attribute is empty</p> <p>Resolved: Error message displayed when importing a person to a Person Lookup Table that did not contain a Company Name column. Import process continues to completion now when Company Name column not found.</p>			

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REPORTS

Profit Center Recap			
New/Mod Change	Requested By	Incident No.	TFS No.
	Novare		757931
Updated to utilize Custom Fields for UW/Oracle Op Codes that are specific to offices/locations.			
Affected item(s): Profit Center Recap			

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SPAdmin-Custom Source of Business Export-Missing Fields			
New/Mod Change	Requested By	Incident No.	TFS No.
	Config/Novare		762674
Excluded miscellaneous products from the report.			
Affected item(s): SPAdmin-Custom Source of Business Export SPAdmin-Custom Source of Business Export-Missing Fields			

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NCS

DOCUMENTS

Escrow

<i>Supplemental Report</i>			
New/Mod Change	Requested By CT Seattle/NCS	Incident No.	TFS No. 762751
Updated the Title Company email to first look to the Examiner's email to pull and if that is empty it will continue to pull the office email.			
Affected item(s): Supplemental Report			

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NCS - CLEAN TITLE

MY SCREENS

Closing Screens

New/Mod Mod	Requested By Mary Matusik	Incident No.	TFS No.
-----------------------	-------------------------------------	---------------------	----------------

The following changes have been made to the **Closing** screens on a CDF order.
 These changes are visible when the **My Screens > GL Clean Title** screen is selected.

Screen	Removed	Added	Updated
Loan Information & Funding		X	
Loan Terms & Payments		X	
CDF Pg1-Closing Info/Proj Payments			X
CDF Pg2-Sections A-J			X
CDF Pg3-Sections K-N & Calc Cash to Close			X
CDF Pg4-Loan Disclosure, AP, AIR			X
CDF Pg5-Loan Cal, Other Disc, Contacts			X
Policy Instructions	X		
Delivery & Tracking	X		

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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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