

# SOFTPRO SELECT

September 2023  
RELEASE NOTES



Testing Release Date: September 1, 2023  
Production Release Date: September 11, 2023

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ALL STATES/SITES

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Escrow

<i>Due on Sale Disclosure</i>			
<b>New/Mod</b> Change	<b>Requested By</b> FNF Documents	<b>Incident No.</b>	<b>TFS No.</b> 781303
Revised to drop the requirement of Existing Lien.			
<b>Affected item(s):</b> Due on Sale Disclosure			

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INTEGRATIONS

<i>Rate Validation Tool</i>			
<b>New/Mod</b> Mod	<b>Requested By</b>	<b>FootPrints No.</b>	<b>DEVOPS No.</b>
<p>The following message displays on the <b>Rate Summary View</b> tab when there are no questions or products to show.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <div style="border-bottom: 1px solid black; padding-bottom: 5px;"> <span style="border: 1px dashed black; padding: 2px;">Rate Summary View (0)</span> <span style="padding: 2px;">Audit View</span> </div> <div style="padding: 5px 0 5px 20px;"> <input checked="" type="radio"/> Title Only             <input type="radio"/> Escrow only             <input type="radio"/> Title &amp; Escrow             <div style="float: right; border: 1px solid gray; padding: 5px 10px; margin-top: 5px;">Save &amp; Close</div> </div> <div style="padding: 10px 0 10px 20px;"> <p>There are no questions or products to show for the selected Order Type</p> </div> </div>			

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REPORTS

1099 Data Export			
<b>New/Mod</b> Change	<b>Requested By</b> Support and Corp Accounting	<b>Incident No.</b>	<b>TFS No.</b> 781084
Change to use Settlement Agent contact as the filer instead of calculated branch logic.			
<b>Affected item(s):</b> 1099 Data Export			

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1099-Misc Detail			
<b>New/Mod</b> Change	<b>Requested By</b> Support and Corp Accounting	<b>Incident No.</b>	<b>TFS No.</b> 781086
Change to use Settlement Agent contact instead of calculated branch logic.			
<b>Affected item(s):</b> 1099-Misc Detail			

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Disbursements by Payee - SPUG # 413			
<b>New/Mod</b> Change	<b>Requested By</b> NCS Ops	<b>Incident No.</b>	<b>TFS No.</b> 781507
Updated to add a wild card Order/File number search parameter.			
<b>Affected item(s):</b> Disbursements by Payee			

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Invoice Aging - SPUG # 227			
<b>New/Mod</b> Change	<b>Requested By</b> TX Title Mgmt.	<b>Incident No.</b>	<b>TFS No.</b> 781801
Added reference number column to the Excel export to show next to the Marketing Source column.			
<b>Affected item(s):</b> Invoice Aging			

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Order Log			
<b>New/Mod</b> Change	<b>Requested By</b> PNW IT	<b>Incident No.</b>	<b>TFS No.</b> 782492
Updated to switch status drop down parameter for picklist.			
<b>Affected item(s):</b> Order Log			

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Orders By Contact			
<b>New/Mod</b> Change	<b>Requested By</b> NCS Atlanta	<b>Incident No.</b>	<b>TFS No.</b> 781708
Added wild card parameter for Marketing Source search and option to the "Contact Type" to search by Listing/Selling broker Combined.			
<b>Affected item(s):</b> Orders By Contact			

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Stale Dated Check Letter			
New/Mod Change	Requested By	Incident No.	TFS No.
	DSG Mgmt.		781782
Updated DSG's email address.			
<b>Affected item(s):</b> Stale Dated Check Letter			

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Title Product Exceptions			
New/Mod Change	Requested By	Incident No.	TFS No.
	FNF i Reports Admin		782584
Updates to exclude files where Policy Code field contains %Hold Open%. Also excluding Title Report; Title Guarantee; No Count; Foreclosure Guarantee; Mortgage Guarantee.			
<b>Affected item(s):</b> Title Product Exceptions			

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Transaction Activity - SPUG # 413			
New/Mod Change	Requested By	Incident No.	TFS No.
	NCS Ops		781505
Updated to add a wild card Order/File number search parameter.			
<b>Affected item(s):</b> Transaction Activity			

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ARIZONA

DOCUMENTS

Escrow

<i>Beneficiary's Deed of Partial Release</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	AZ	INC230307845	782407
Added space between "of" and county name in first paragraph.			
<b>Affected item(s):</b> Beneficiary's Deed of Partial Release			

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<i>EI Sale (EIS)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	LTN AZ		781939
Updated to reflect more items regarding Earnest Money as well as revising the Listed Items section.			
<b>Affected item(s):</b> EI Sale (EIS)			

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<i>Endorsement Addendum</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	CT AZ		781512
Updated to pull digital signature and title.			
<div style="border: 1px solid black; padding: 10px;"> <p>Any other Endorsements requested may result in additional charges.</p> <p>Closing Agent's obligation under this agreement is limited to file <a href="#">CD AZ Test</a>.</p> <p>IN WITNESS WHEREOF, the undersigned have executed this document on _____, _____.</p> <div style="text-align: center; margin-top: 20px;">             Joseph D Kirby            Title Examiner         </div> </div>			
<b>Affected item(s):</b> Endorsement Addendum			

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<i>EPU HOA Worksheet</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	FT AZ		782639
The Type of Transaction has been changed to Product Type.			
<b>Affected item(s):</b> EPU HOA Worksheet			

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<i>EPU Opening Summary</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	FT AZ		782411
The Type of Transaction has been changed to Product Type.			
<b>Affected item(s):</b> EPU Opening Summary			

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Title

<i>ALTA Homeowner's Policy of Title Insurance 2021 (AZ)</i>			
<b>New/Mod</b> New	<b>Requested By</b> Internal Maintenance	<b>Incident No.</b>	<b>TFS No.</b> 779021
This form is a state and product-specific version of the 2021 ALTA Homeowner's Policy of Title Insurance to be used in lieu of Master Owner's Policy for faster document rendering.			
<b><u>Affected item(s):</u></b> AZD1457.doc - ALTA Homeowner's Policy of Title Insurance 2021 (AZ) (New)			

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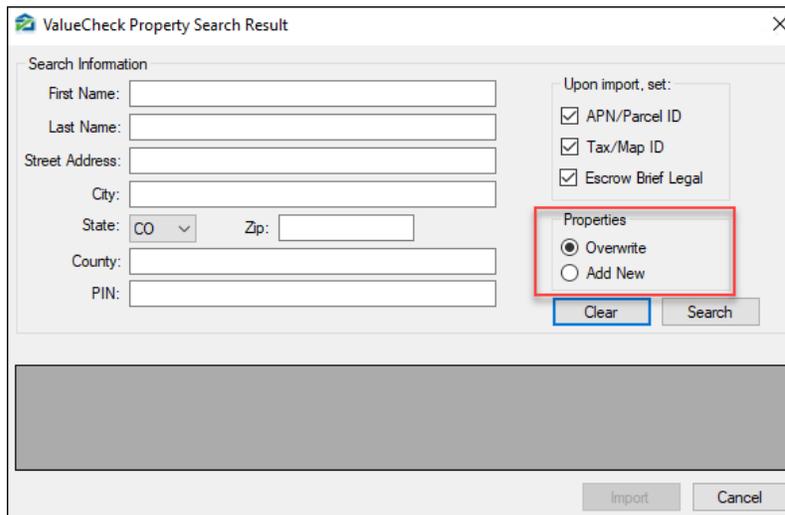
INTEGRATIONS

<i>Rate Validation Tool</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>When determining the effective date of a rate validation request, the timestamp is removed when comparing the Select <b>Date/Time order received</b> field to the <b>Date/time title opened</b> and <b>Date/time escrow opened</b> fields. This determines if the request is a single request or two requests with different effective dates.</p>			

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<i>ValueCheck Property Search (Address Validation)</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			

The ability to import multiple properties has been added with the option to overwrite or add new (append) search results.



- › Overwrite – when selected,
  - » all existing properties in the order are removed and the selected properties are imported to the order.
  - » existing Buyer or Seller Contacts in the order are overwritten with the owners associated with the imported properties.
- › Add New – when selected, the new properties are added consecutively, after the last existing property. If an existing property address is a duplicate of a property being imported, that property will not be imported.
- › Order contacts are created when:
  - » A Buyer contact is created when a Buyer nor Seller exist in the order and Transaction Type is not a Purchase.
  - » A Buyer contact is created when one to multiple Buyers exist in the order and no Seller contact.
  - » A Seller contact is created when a Buyer nor Seller exist in the order and Transaction Type is a Purchase.

*ValueCheck Property Search (Address Validation)*

- » A Seller contact is created when one to multiple Sellers and one to multiple Buyers exist in the order.
- » A Seller contact is created when one to multiple Sellers exist in the order and no Buyer exist.
- › Order contacts are not created when:
  - » When at least one "Own1" field is populated with a value and all "Own2" fields are empty and the Select contact equals the "Own1" values.
  - » When at least one "Own2" field is populated with a value and all "Own1" fields are empty and the Select contact equals the "Own2" values.
  - » When at least one "Own1" field and at least one "Own2" field is populated with a value:
    - If "Yes" is selected on the option to combine contacts: A new contact is not created when the Select contact Individual1 values equal the "Own1" values and the Select contact Individual2 values equal the "Own2" values.
    - If "No" is selected on the option to combine contacts: A new contact is not created when the Select contact values equal the "Own1" values or when the Select contact values equal the "Own2" values.
- › Confirmation message displays when a buyer or seller contact is being removed.
- › The Order Transaction type will be used to determine if the buyer or seller need to be updated.
  - » Purchase transaction – only seller contact will be updated, added or deleted
  - » All other transaction – only buyer contact will be updated, added or deleted
- › Search results no longer default the **Select** check box to be checked on the first property.

Resolved: The APN, Tax/Map ID and Escrow Brief Legal check boxes were not persisting when re-opening the Property Search Results dialog. Two configurable settings have been added to the ValueCheck XML: DefaultImportSettings and SaveImportSettings.

Resolved: Contact being deleted and re-added when using the Overwrite option.

The tool will now replace the data within the existing contact by overwriting the fields allowed by ValueCheck.

Resolved: Buyer contacts being deleted when importing owner into Purchase order.

Resolved: Buyer and Seller middle name not being imported.

Resolved: Error displayed when importing Range and Township data due to conflict in format (data received is a string value and the ProForm field is an integer).

Data is now parsed as:

- » If Range value in response is not empty
  - Accept string values of zero to many characters.
  - The first ten numeric values, up to 10, go to Order.Properties[].TownshipRange.Range.
  - The first non-numeric value goes to Order.Properties[].TownshipRange.RangeDirection.
  - All other characters are ignored.
  - Error message will be written when the numeric data exceeds 10 values.
  - Error message will be written when the non-numeric data exceeds 1 value.

*ValueCheck Property Search (Address Validation)*

- » If Township value in response is not empty
  - Accept string values of zero to many characters.
  - The first ten numeric values, up to 10, go to Order.Properties[].TownshipRange.Township.
  - The first non-numeric value goes to Order.Properties[].TownshipRange.TownshipDirection.
  - All other characters are ignored.
  - Error message will be written when the numeric data exceeds 10 values.
  - Error message will be written when the non-numeric data exceeds 1 value

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MY SCREENS

<i>Order Entry Screen</i>			
<b>New/Mod</b> Mod	<b>Requested By</b> Jennifer Douthit	<b>Incident No.</b>	<b>TFS No.</b>

The **Order Entry** and **Order Entry – Escrow** screens have been modified to show the **smartview Order No.** field at the top of the screen.

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

- > **Arizona Escrow Screens**
- > **Arizona Title Screens**
- > **AZ Escrow**

The image displays two screenshots of software screens. The top screenshot is titled 'Order Entry' and shows a 'smartview Order' input field highlighted with a red circle. Below it are sections for 'SEND TO TITLE', 'Send To Title:', 'Due date/time:', and 'Transaction type' with radio buttons for Purchase, Refinance, Equity, and Other. The bottom screenshot is titled 'Order Entry - Escrow' and also shows the 'smartview Order' field highlighted with a red circle. It includes the same 'SEND TO TITLE' section and adds checkboxes for Commercial, Construction, and Out of county, along with dropdown menus for Order type, Product type, and Policy type.

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REPORTS

InHere Receipt			
<b>New/Mod Change</b>	<b>Requested By</b> AZ Ops and Config	<b>Incident No.</b>	<b>TFS No.</b> 780135
Adding address, phone and fax numbers to show below the logo, as well as the A.R.S 6-841.03 Notice.			
<b>Affected item(s):</b> InHere Receipt			

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CALIFORNIA

DOCUMENTS

Escrow

<i>Adding Wrap Exhibit Language</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	LT Grand Canyon		781460
Added exhibits for Wrap language.			
<b>Affected item(s):</b> Deed of Trust Assignment of Rents Note (Installment - Interest Included)			

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<i>Affidavit (Death of Transferor)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	CT Central Coast		782633
Updated to add the "NOTICE TO HEIRS" language.			
<b>Affected item(s):</b> Affidavit (Death of Transferor)			

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<i>Affidavit (Surviving Spouse CPWROS) (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	State Counsel		780013
Added "OF DEATH" to the title.			
<b>Affected item(s):</b> Affidavit (Surviving Spouse CPWROS) Affidavit (Surviving Spouse CPWROS) with PCOR			

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<i>Affidavit (Transfer Tax - San Benito)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	San Benito CA		781484
Updated to reflect most recent version provided by the county.			
<b>Affected item(s):</b> Affidavit (Transfer Tax - San Benito)			

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<i>Commission Documents</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	SoCal Escrow Admin		782642
Adjusted to account for scenarios where \$0.00 is reflected on the CDF.			
<b>Affected item(s):</b> Commission - Seller Commission - Seller Amended Commission Clarification-Disbursement Instructions EI Sale HUD Division (EIS)			

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<i>FIRPTA - Certification of Non-Foreign Status</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	CT CA		780141
Revised to render per person.			
<b>Affected item(s):</b> FIRPTA - Certification of Non-Foreign Status			

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<a href="#">FIRPTA - Slrs Cert of Non-Foreign Status</a>			
New/Mod Change	Requested By	Incident No.	TFS No.
	CT CA		780145
Revised to render per person.			
<b>Affected item(s):</b> FIRPTA - Slrs Cert of Non-Foreign Status			

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<a href="#">MH Tax Clearance Request Form (Humboldt)</a>			
New/Mod Change	Requested By	Incident No.	TFS No.
	FNT Fair Oaks		780139
Updated form to reflect most recent version.			
<b>Affected item(s):</b> MH Tax Clearance Request Form (Humboldt)			

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<a href="#">Request for Conditional Tax Clearance (Los Angeles County)</a>			
New/Mod Change	Requested By	Incident No.	TFS No.
	SoCal Escrow Admin		782635
Document has been disabled as it is no longer usable or accepted by LA County.			
<b>Affected item(s):</b> Request for Conditional Tax Clearance (Los Angeles County)			

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<a href="#">Separate Commission – Listing-Selling</a>			
New/Mod Change	Requested By	Incident No.	TFS No.
	CA	INC230298740	782612
Revised to correct the issue with the totals and will now show the Agent's name for any Commission they are getting.			
<b>Affected item(s):</b> Separate Commission – Listing-Selling			

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<a href="#">Transferor's Affidavit Pursuant to FIRPTA</a>			
New/Mod Change	Requested By	Incident No.	TFS No.
	CT CA		780143
Revised to render per person.			
<b>Affected item(s):</b> Transferor's Affidavit Pursuant to FIRPTA			

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<a href="#">Wire Instructions (Disbursement for Agents)</a>			
New/Mod	Requested By	Incident No.	TFS No.
New	CT Santa Clara CA		781291
New document. Please render to view in full.			
<b>Affected item(s):</b> SSCORPD5860.doc - Wire Instructions (Disbursement for Agents) (New)			

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Escrow/Title

<i>Billing Statement (TT)</i>			
<b>New/Mod</b> New	<b>Requested By</b> Sammy Simpson	<b>Incident No.</b>	<b>TFS No.</b> 782173
New Billing Statement for TT SoCal.			
<b>Affected item(s):</b> SSCROPD5862.spdoc - Billing Instruction (TT) (New)			

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<i>Removing the City from the Preamble to the legal description for CA</i>				
<b>New/Mod</b> Change	<b>Requested By</b> CA State Counsel	<b>Incident No.</b>	<b>TFS No.</b> 781090	
For CA operations: State Counsel has requested that the reference to the City in the preamble that appears above legal descriptions to be removed.				
<table border="1" style="width: 100%;"> <tr> <td> <p>For APN/Parcel ID(s): <b>1111APN</b> and <b>1112APN</b>  For Tax Map ID(s): <b>121212TM</b></p> <hr/> <p>THE LAND REFERRED TO HEREIN BELOW IS SITUATED IN THE COUNTY OF LOS ANGELES, STATE OF CALIFORNIA AND IS DESCRIBED AS FOLLOWS:  Property 1 Legal Description Property 1 Legal Description Property 1 Legal Description</p> </td> </tr> </table>				<p>For APN/Parcel ID(s): <b>1111APN</b> and <b>1112APN</b>  For Tax Map ID(s): <b>121212TM</b></p> <hr/> <p>THE LAND REFERRED TO HEREIN BELOW IS SITUATED IN THE COUNTY OF LOS ANGELES, STATE OF CALIFORNIA AND IS DESCRIBED AS FOLLOWS:  Property 1 Legal Description Property 1 Legal Description Property 1 Legal Description</p>
<p>For APN/Parcel ID(s): <b>1111APN</b> and <b>1112APN</b>  For Tax Map ID(s): <b>121212TM</b></p> <hr/> <p>THE LAND REFERRED TO HEREIN BELOW IS SITUATED IN THE COUNTY OF LOS ANGELES, STATE OF CALIFORNIA AND IS DESCRIBED AS FOLLOWS:  Property 1 Legal Description Property 1 Legal Description Property 1 Legal Description</p>				

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Title

<i>Supplemental Report (4)</i>			
<b>New/Mod</b> Change	<b>Requested By</b> Gary Ferguson	<b>Incident No.</b> INC230293560	<b>TFS No.</b> 780785
Updated to pull from the new 2023 CLTA Preliminary Report fields.			
<b>Affected item(s):</b> Supplemental Report Supplemental Report - Current Owner Supplemental Report - Current Owner and Exceptions Supplemental Report - Current Owner Effective Date and Exceptions			

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INTEGRATIONS

<i>Rate Validation Tool</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>Support added for the Commercial Short-Term Policy allowing the removal of the Short Term Rate question on the Rate Summary and aligning with the Policy Codes.</p> <ul style="list-style-type: none"> <li>- CAXX-21-Com Short Term Std Own / Ext Loan</li> <li>- CAXX-21-Commercial Short Term Standard Owners</li> <li>- CAXX-22-Com Short Term Std Own / Std Loan</li> <li>- CAXX-22-Commercial Short Term Extended Owners</li> <li>- CAXX-23-Com Short Term Ext Own / Ext Loan</li> <li>- CAXX-24-Com Short Term Ext Own / Std Loan</li> <li>- CAXX-21C-Com Short Term Ext Construction Loan</li> <li>- CAXX-21-Com Short Term Ext Loan</li> <li>- CAXX-22-Com Short Term Std Loan</li> <li>- CAXX-23C-Com Short Term Std Construction Loan</li> </ul>			
<p>When determining the effective date of a rate validation request, the timestamp is removed when comparing the Select <b>Date/Time order received</b> field to the <b>Date/time title opened</b> and <b>Date/time escrow opened</b> fields. This determines if the request is a single request or two requests with different effective dates.</p>			

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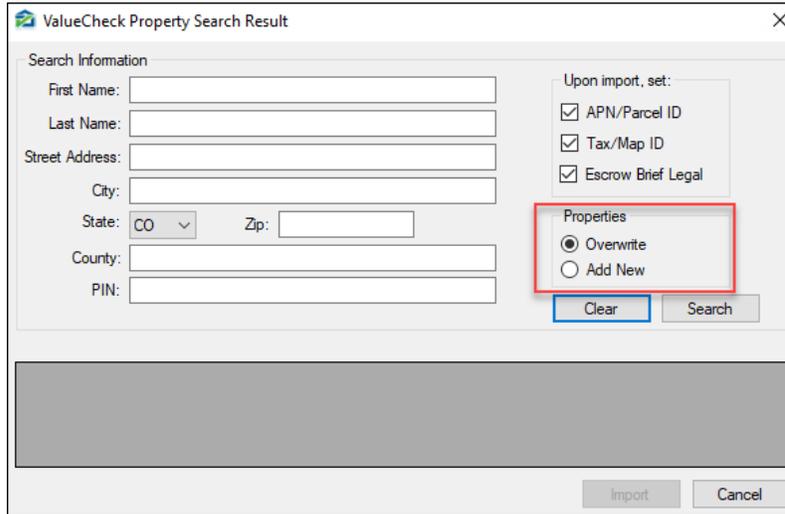
<i>ValueCheck (LinkIt)</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>Resolved: Red text displays regardless of requirement/exception will be hyperlinked.</p> <p>Requirements and exceptions not in RTF format will no longer be converted to RTF nor sent to ValueCheck.</p> <p>Resolved: Part of the Vesting name cut off.</p>			

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*ValueCheck Property Search (Address Validation)*

New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			

The ability to import multiple properties has been added with the option to overwrite or add new (append) search results.



- > Overwrite – when selected,
  - » all existing properties in the order are removed and the selected properties are imported to the order.
  - » existing Buyer or Seller Contacts in the order are overwritten with the owners associated with the imported properties.
- > Add New – when selected, the new properties are added consecutively, after the last existing property. If an existing property address is a duplicate of a property being imported, that property will not be imported.
- > Order contacts are created when:
  - » A Buyer contact is created when a Buyer nor Seller exist in the order and Transaction Type is not a Purchase.
  - » A Buyer contact is created when one to multiple Buyers exist in the order and no Seller contact.
  - » A Seller contact is created when a Buyer nor Seller exist in the order and Transaction Type is a Purchase.
  - » A Seller contact is created when one to multiple Sellers and one to multiple Buyers exist in the order.
  - » A Seller contact is created when one to multiple Sellers exist in the order and no Buyer exist.
- > Order contacts are not created when:
  - » When at least one “Own1” field is populated with a value and all “Own2” fields are empty and the Select contact equals the “Own1” values.
  - » When at least one “Own2” field is populated with a value and all “Own1” fields are empty and the Select contact equals the “Own2” values.
  - » When at least one “Own1” field and at least one “Own2” field is populated with a value:

*ValueCheck Property Search (Address Validation)*

- If "Yes" is selected on the option to combine contacts: A new contact is not created when the Select contact Individual1 values equal the "Own1" values and the Select contact Individual2 values equal the "Own2" values.
- If "No" is selected on the option to combine contacts: A new contact is not created when the Select contact values equal the "Own1" values or when the Select contact values equal the "Own2" values.
- › Confirmation message displays when a buyer or seller contact is being removed.
- › The Order Transaction type will be used to determine if the buyer or seller need to be updated.
  - » Purchase transaction – only seller contact will be updated, added or deleted
  - » All other transaction – only buyer contact will be updated, added or deleted
- › Search results no longer default the **Select** check box to be checked on the first property.

Resolved: The APN, Tax/Map ID and Escrow Brief Legal check boxes were not persisting when re-opening the Property Search Results dialog. Two configurable settings have been added to the ValueCheck XML: DefaultImportSettings and SaveImportSettings.

Resolved: Contact being deleted and re-added when using the Overwrite option.

The tool will now replace the data within the existing contact by overwriting the fields allowed by ValueCheck.

Resolved: Buyer contacts being deleted when importing owner into Purchase order.

Resolved: Buyer and Seller middle name not being imported.

Resolved: Error displayed when importing Range and Township data due to conflict in format (data received is a string value and the ProForm field is an integer).

Data is now parsed as:

- » If Range value in response is not empty
  - Accept string values of zero to many characters.
  - The first ten numeric values, up to 10, go to Order.Properties[].TownshipRange.Range.
  - The first non-numeric value goes to Order.Properties[].TownshipRange.RangeDirection.
  - All other characters are ignored.
  - Error message will be written when the numeric data exceeds 10 values.
  - Error message will be written when the non-numeric data exceeds 1 value.
- » If Township value in response is not empty
  - Accept string values of zero to many characters.
  - The first ten numeric values, up to 10, go to Order.Properties[].TownshipRange.Township.
  - The first non-numeric value goes to Order.Properties[].TownshipRange.TownshipDirection.
  - All other characters are ignored.
  - Error message will be written when the numeric data exceeds 10 values.
  - Error message will be written when the non-numeric data exceeds 1 value.

MY SCREENS

All Screens

<b>New/Mod</b> Mod	<b>Requested By</b> Paul Avila	<b>Incident No.</b>	<b>TFS No.</b>
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The location of the screens in each section have been adjusted as shown below.

This change is visible when the **My Screens > Northern CA – FT SAC Commercial 010** screen is selected.

Before

**Open Order/General**

- ▶ Order Entry
- Title Insurance Premiums
- Policy Selection
- Status
- Order Contacts
- Order Information
- Property
- Sales Contract & Earnest Money
- Order Notes

---

**Document Preparation**

- Escrow Instructions
- Escrow Instructions - Expanded
- Escrow Instructions - Mobile Home
- Deed
- Security Instruments
- Existing Liens
- Notary & Acknowledgment
- Escrow Agreement/Holdback Inst.
- Recording Information

---

**Settlement Statement**

- Additional Title Charges
- Title Insurance Premiums
- Endorsements
- Prorations
- Rent Schedule
- Loan Information & Funding
- Loan Terms & Payments
- 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
- Order Transactions
- Order Balance
- Seller Proceeds & 1099-S
- Options

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**Miscellaneous**

- Construction Affidavit

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**Internal Websites**

- Fidelity Fraud Prevention
- Home Warranty
- Disclosure Source

After

**Open Order/General**

- ▶ Order Entry
- Order Contacts
- Property
- Policy Selection
- Title Insurance Premiums
- Endorsements
- Status
- Order Information
- Sales Contract & Earnest Money

---

**Settlement Statement**

- Additional Title Charges
- Prorations
- Rent Schedule
- Loan Information & Funding
- Loan Terms & Payments
- Order Transactions
- 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
- Order Balance
- Seller Proceeds & 1099-S
- Options

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**Document Preparation**

- Escrow Instructions
- Escrow Instructions - Expanded
- Deed
- Policy Instructions
- Policy Instructions - Out of County
- Security Instruments
- Assumptions
- Existing Liens
- Reconveyance / Substitution
- Subordinations
- Escrow Agreement/Holdback Inst.
- Notary & Acknowledgment

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**Miscellaneous**

- Preliminary Title Search & Opinion
- Construction Affidavit
- Invoice
- Options
- Settlement Options

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<i>Loan Information &amp; Funding Screen</i>			
<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
<p>The <b>Loan Information &amp; Funding</b> screen has been moved below the <b>Payoff Instructions</b> screen.</p> <p>This change is visible when the <b>My Screens &gt; SoCal Title Recording Screens Impact to SPS</b> screen is selected.</p> <div style="display: flex; justify-content: space-around; align-items: flex-start;"> <div style="border: 1px solid #ccc; padding: 10px; width: 45%;"> <p><b>Title Process</b></p> <ul style="list-style-type: none"> <li>Order Entry</li> <li>Policy Selection</li> <li>Title Insurance Premiums</li> <li>▶ <b>Loan Information &amp; Funding</b></li> <li>Endorsements</li> <li>Title Billing and Recordings</li> <li>Escrow and Title Charges</li> <li>Payoff Instructions</li> </ul> </div> <div style="border: 1px solid #ccc; padding: 10px; width: 45%;"> <p><b>Title Process</b></p> <ul style="list-style-type: none"> <li>Order Entry</li> <li>Policy Selection</li> <li>Title Insurance Premiums</li> <li>Endorsements</li> <li>Title Billing and Recordings</li> <li>Escrow and Title Charges</li> <li>Payoff Instructions</li> <li>▶ <b>Loan Information &amp; Funding</b></li> </ul> </div> </div>			

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*Order Entry Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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The **Order Entry** screen has been modified to include the **Sales Contract** section to include the fields as shown below.

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

The screenshot shows the 'Order Entry' screen with the following fields:

- Transaction type:**
  - Purchase
  - Refinance
  - Equity
- Checkboxes:**
  - Commercial
  - Construction
  - Cash sale
  - Out of county
  - Sub-Escrow
- Order type:** [Dropdown menu]
- Product type:** [Dropdown menu]
- Policy type:** [Dropdown menu]
- Days Until Closing:** [Text input field]
- Settlement date/time:** [(None) Dropdown]  Estimated date/time
- Sales Contract (highlighted in red):**
  - Sales price:** [Text input field]
  - Seller financing:** [Text input field] **Line:** [Dropdown menu]
  - Contract date:** [(None) Dropdown]
  - Contract expires:** [(None) Dropdown]
  - Due date/time:** [(None) Dropdown]

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*Payoff Instructions Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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The Hold Amount field has been removed from the Payoff Instructions screen.  
 This change is visible when one of the following **My Screens** is selected:

- > **SoCal Title Screens Impact to SPS**
- > **SoCal Title Screens Impact to SPS TT**

The screenshot shows the 'Payoff Instructions' form with the following fields:

- Escrow office: [dropdown]
- Escrow officer/Closer: [dropdown]
- Title office: [dropdown]
- Title officer/Examiner: [dropdown]
- Recording Date: (None) [dropdown]
- Hold Amount:** [text input field, circled in red]
- Hold end date: (None) [dropdown]
- Property Taxes: [dropdown]
- Current Taxes (installment, amount and due date): [text input field]

A black arrow points from a black box labeled 'REMOVED' to the 'Hold Amount' field, indicating its removal.

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<i>Property Screen</i>			
<b>New/Mod</b> Mod	<b>Requested By</b> Sammy Simpson	<b>Incident No.</b>	<b>TFS No.</b>

The **Property** screen has been updated to include the following more/less sections:

- > **Manufactured Housing**
- > **Manufactured Housing – Section 2**
- > **Manufactured Housing – Section 3**
- > **Manufactured Housing – Section 4**

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

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PHRASE(S)

<i>New EI Phrase</i>			
<b>New/Mod</b> New	<b>Requested By</b> Ticor SoCal	<b>Incident No.</b>	<b>TFS No.</b> 783294
<p><b>Code: mh37 / Additional Fees Required by HCD</b></p> <p><b>ADDITIONAL FEES REQUIRED BY HCD:</b> Escrow Holder is hereby authorized and instructed to hold the sum of \$[PROMPT (Enter amount Escrow Holder is authorized to hold from buyer and seller)] each from Buyer(s)' deposit and Seller(s)' proceeds (for a total amount of \$[PROMPT (Enter the total amount held by Escrow Holder)]), at close of escrow, for any additional fees required by HCD. Upon verification of transfer, Escrow Holder shall deduct fees, if any, from said sum, and charge Buyer(s)' account or Seller(s)' account, depending on the nature of the fee customarily charged to Buyer(s) or Seller(s) and disburse any remaining funds from Buyer(s)' deposit back to the Buyer(s) and Seller(s)' proceeds back to the Seller(s).</p>			

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REPORTS

Binder Report			
<b>New/Mod Change</b>	<b>Requested By</b> SoCal Escrow Admin	<b>Incident No.</b>	<b>TFS No.</b> 782468
Miscellaneous updates.			
<b>Affected item(s):</b> Binder Report			

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Closings by Post Date			
<b>New/Mod Change</b>	<b>Requested By</b> FNT LA OAC and FNT SD - IE	<b>Incident No.</b>	<b>TFS No.</b> 781933
Updated as follows:			
<ol style="list-style-type: none"> <li>1. New logic for FNT LA only to limit results to files closed in the date range</li> <li>2. Added branch picklist parameter</li> <li>3. Added option to export to Excel</li> <li>4. Formatting updates</li> </ol>			
<b>Affected item(s):</b> Closing by Post Date			

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Data Download			
<b>New/Mod Change</b>	<b>Requested By</b> FNT LA OAC and FNT SD - IE	<b>Incident No.</b>	<b>TFS No.</b> 781964
Updated to suppress files with a Canceled status. Also added logic for FNT LA only to limit results to files closed in the date range.			
<b>Affected item(s):</b> Data Download			

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Loan Depot - Clear to Close			
<b>New/Mod</b> New	<b>Requested By</b> Lenders Direct Admin	<b>Incident No.</b>	<b>TFS No.</b> 783129
New report for Lenders Direct.			
<b>Affected item(s):</b> Loan Depot - Clear to Close			

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Loan Depot - Daily Pipeline			
<b>New/Mod</b> New	<b>Requested By</b> Lenders Direct Admin	<b>Incident No.</b>	<b>TFS No.</b> 775305
New report for Lenders Direct.			
<b>Affected item(s):</b> Loan Depot - Daily Pipeline			

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Opened/Closed Orders by {Selection}			
<b>New/Mod Change</b>	<b>Requested By</b> FNT OC Admin	<b>Incident No.</b>	<b>TFS No.</b> 782418
Updated to move SUB bill code to "Other Revenue" for all FNT and TT SoCal operations.			
<b>Affected item(s):</b> Opened/Closed Orders by {Selection}			

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Openings by Marketing Rep w/Splits			
<b>New/Mod Change</b>	<b>Requested By</b> FNT SD / IE	<b>Incident No.</b>	<b>TFS No.</b> 782025
Updated to omit Escrow Only files.			
<b>Affected item(s):</b> Openings by Marketing Rep w/Splits			

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Escrow/Title

<i>Transaction Form</i>			
<b>New/Mod</b> Change	<b>Requested By</b> CT Everett, FNT OC, AllFirst, CO Admin	<b>Incident No.</b>	<b>TFS No.</b> 781724
Updated to show the date of the posted receipt for CT Everett (WA). For CO removed **Cash deposit verified text.			
<b><u>Affected item(s):</u></b> Transaction Form			

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COLORADO

DOCUMENTS

Escrow

<i>Affidavit and Indemnity Agreement</i>			
<b>New/Mod</b> Change	<b>Requested By</b> Colorado	<b>Incident No.</b>	<b>TFS No.</b> 781252
Updated to work for buyer/borrowers for refinance transactions.			
<b>Affected item(s):</b> Affidavit and Indemnity Agreement			

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INTEGRATIONS

<i>Person Lookup Table Sync</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>Resolved: Issue with Lookup Table column existence checks looking at hard-coded “Order Contact – Person” table versus the current table.</p> <p>Determine if query should be on the “LookupCodeMain” column or the “FilterLookupCodeMain” column.</p> <p>Set the XML configuration value “FNF.Pulse.LookupTableSync.CompanyNotesColumn” to be “.CompanyAlertMessage_FNF#” versus “.PulseNotes#”.</p> <p><b>NOTE:</b> If upgrading to this build, registering the FNF.Pulse.LookupTableSync XML file is not required.</p> <p>Resolved: Bug re-introduced in v1.9.3.0: Error message displaying when importing a person to a Person Lookup Table that did not contain a Company Name column.</p> <p>Company Name column set to no longer be required.</p>			

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<i>Rate Validation Tool</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>When determining the effective date of a rate validation request, the timestamp is removed when comparing the Select <b>Date/Time order received</b> field to the <b>Date/time title opened</b> and <b>Date/time escrow opened</b> fields. This determines if the request is a single request or two requests with different effective dates.</p>			

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*Rate Validation Tool*

New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			

The following questions have been removed from the Rate Summary View tab on a Hold Open (part 2) transaction.

- > **Is this the initial conveyance?**
- > **Were extended coverage charges paid for at the initial conveyance?**
- > **Is this the resale to the ultimate purchaser within the permissible time period?**

Rate Summary View (11) Audit View

Title Only
  Escrow only
  Title & Escrow
 Save & Close

**General**

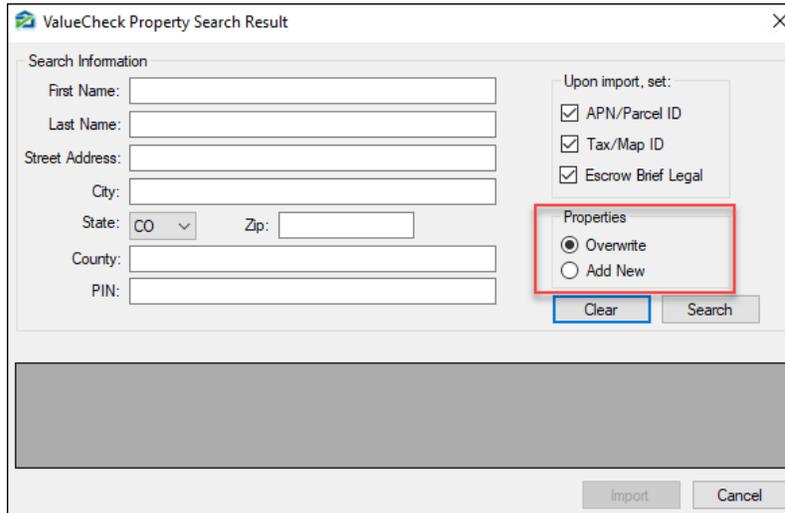
Lender Closing Protection Letter requested	<input type="radio"/> Yes <input type="radio"/> No
Buyer/Borrower Closing Protection Letter requested	<input type="radio"/> Yes <input checked="" type="radio"/> No
Seller Closing Protection Letter requested	<input type="radio"/> Yes <input checked="" type="radio"/> No
Is the transaction eligible for the Abstract Retirement rate?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Is the Owner?s Policy being waived?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Does this transaction involve a sale with a commitment to insure a resale?	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Is this the initial conveyance?</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Were extended coverage charges paid for at the initial conveyance?</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Is this the resale to the ultimate purchaser within the permissible time period ?</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No
Is this transaction eligible for the Short Term rate?	<input type="radio"/> Yes <input checked="" type="radio"/> No

← REMOVED

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<i>ValueCheck (LinkIt)</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>Resolved: Red text displays regardless of requirement/exception will be hyperlinked.</p> <p>Requirements and exceptions not in RTF format will no longer be converted to RTF nor sent to ValueCheck.</p> <p>Resolved: Part of the Vesting name cut off.</p>			

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<i>ValueCheck Property Search (Address Validation)</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>The ability to import multiple properties has been added with the option to overwrite or add new (append) search results.</p> <div data-bbox="433 812 1218 1325" data-label="Image">  </div> <ul style="list-style-type: none"> <li>› Overwrite – when selected,             <ul style="list-style-type: none"> <li>» all existing properties in the order are removed and the selected properties are imported to the order.</li> <li>» existing Buyer or Seller Contacts in the order are overwritten with the owners associated with the imported properties.</li> </ul> </li> <li>› Add New – when selected, the new properties are added consecutively, after the last existing property. If an existing property address is a duplicate of a property being imported, that property will not be imported.</li> <li>› Order contacts <u>are created</u> when:             <ul style="list-style-type: none"> <li>» A Buyer contact is created when a Buyer nor Seller exist in the order and Transaction Type is not a Purchase.</li> <li>» A Buyer contact is created when one to multiple Buyers exist in the order and no Seller contact.</li> <li>» A Seller contact is created when a Buyer nor Seller exist in the order and Transaction Type is a Purchase.</li> </ul> </li> </ul>			

*ValueCheck Property Search (Address Validation)*

- » A Seller contact is created when one to multiple Sellers and one to multiple Buyers exist in the order.
- » A Seller contact is created when one to multiple Sellers exist in the order and no Buyer exist.
- › Order contacts are not created when:
  - » When at least one “Own1” field is populated with a value and all “Own2” fields are empty and the Select contact equals the “Own1” values.
  - » When at least one “Own2” field is populated with a value and all “Own1” fields are empty and the Select contact equals the “Own2” values.
  - » When at least one “Own1” field and at least one “Own2” field is populated with a value:
    - If "Yes" is selected on the option to combine contacts: A new contact is not created when the Select contact Individual1 values equal the “Own1” values and the Select contact Individual2 values equal the “Own2” values.
    - If "No" is selected on the option to combine contacts: A new contact is not created when the Select contact values equal the “Own1” values or when the Select contact values equal the “Own2” values.
- › Confirmation message displays when a buyer or seller contact is being removed.
- › The Order Transaction type will be used to determine if the buyer or seller need to be updated.
  - » Purchase transaction – only seller contact will be updated, added or deleted
  - » All other transaction – only buyer contact will be updated, added or deleted
- › Search results no longer default the **Select** check box to be checked on the first property.

Resolved: The APN, Tax/Map ID and Escrow Brief Legal check boxes were not persisting when re-opening the Property Search Results dialog. Two configurable settings have been added to the ValueCheck XML: DefaultImportSettings and SaveImportSettings.

Resolved: Contact being deleted and re-added when using the Overwrite option.

The tool will now replace the data within the existing contact by overwriting the fields allowed by ValueCheck.

Resolved: Buyer contacts being deleted when importing owner into Purchase order.

Resolved: Buyer and Seller middle name not being imported.

Resolved: Error displayed when importing Range and Township data due to conflict in format (data received is a string value and the ProForm field is an integer).

Data is now parsed as:

- » If Range value in response is not empty
  - Accept string values of zero to many characters.
  - The first ten numeric values, up to 10, go to Order.Properties[].TownshipRange.Range.
  - The first non-numeric value goes to Order.Properties[].TownshipRange.RangeDirection.
  - All other characters are ignored.
  - Error message will be written when the numeric data exceeds 10 values.
  - Error message will be written when the non-numeric data exceeds 1 value.

*ValueCheck Property Search (Address Validation)*

- » If Township value in response is not empty
  - Accept string values of zero to many characters.
  - The first ten numeric values, up to 10, go to Order.Properties[].TownshipRange.Township.
  - The first non-numeric value goes to Order.Properties[].TownshipRange.TownshipDirection.
  - All other characters are ignored.
  - Error message will be written when the numeric data exceeds 10 values.
  - Error message will be written when the non-numeric data exceeds 1 value.

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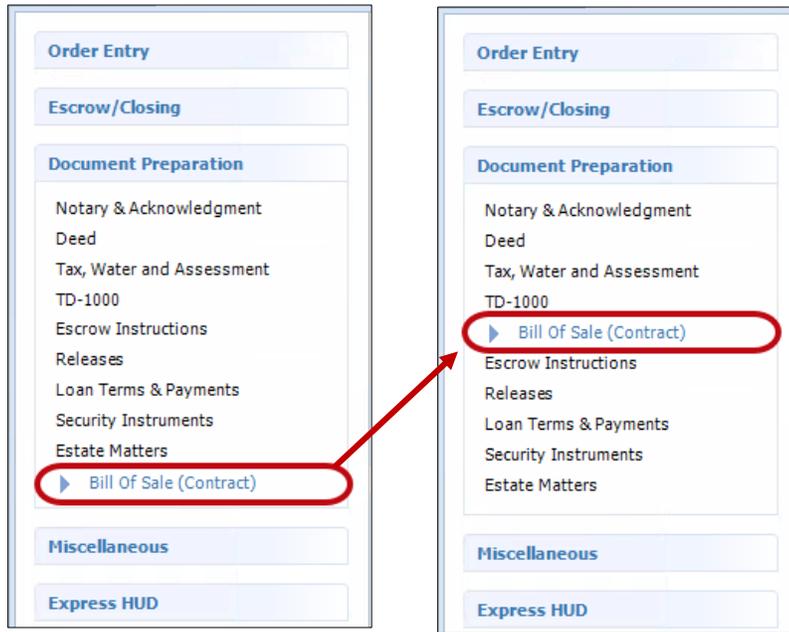
MY SCREENS

*Bill of Sale (Contract) Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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The **Bill of Sale (Contract)** screen has been moved to above the **Escrow Instructions** screen.

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



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*Listing Agent/Broker and Selling Agent/Broker Screens*

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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The **Outgoing Wire Information** section has been added back to the **Listing Agent/Broker** and **Selling Agent/Broker** screens.

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

The screenshot displays two overlapping web forms. The top form is titled "Listing Agent/Broker" and the bottom form is titled "Selling Agent/Broker". Both forms feature an "Outgoing Wire Information" section highlighted with a red border. This section includes fields for Bank name, ABA routing number, Credit account name, and Special instructions, along with verification fields for "Verified with:", "Verified date/time:", "Verified phone:", and "Verified by:". The "Selling Agent/Broker" form also includes a "Verified comments" field. Both forms have a "Save And Add New" button and checkboxes for "Include on revenue reports", "Marketing source", and "Commitment recipient".

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*Options Screens*

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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The **Options** screen has been modified to include the following custom fields:

- › **Text to overwrite Settlement Statement buyer signature**
- › **Text to overwrite Settlement Statement seller signature**
- › **Text to overwrite Settlement Statement header 'Settlement**
- › **Text to overwrite Settlement Statement header**
- › **Text to overwrite Settlement Statement title**
- › **Print Settlement agent signature on CDF settlement statement**
- › **Text to be printed at top of all HUD pages**

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

The screenshot shows the 'Options' screen with several checkboxes at the top:
 

- Use optional Closing Disclosure forms for transactions not involving seller (Refinance)
- Sort CDF page 2 lines descriptions alphabetically on order save
- Print POC codes on Closing Disclosure form
- Use buyer/seller split page

 A red rounded rectangle highlights the following new fields:
 

- Text to overwrite Settlement Statement buyer signature: [Text input field]
- Text to overwrite Settlement Statement seller signature: [Text input field]
- Text to overwrite Settlement Statement header 'Settlement': [Text input field]
- Text to overwrite Settlement Statement header: [Text input field]
- Text to overwrite Settlement Statement title: [Text input field]
- Print settlement agent signature on CDF settlement statement
- Text to be printed at top of all HUD pages: [Text input field]

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REPORTS

Commitment/Policy Status (CO)			
<b>New/Mod Change</b>	<b>Requested By</b> Co CPF Admin	<b>Incident No.</b>	<b>TFS No.</b> 780481
Updated to make Programming Notes clearer and easier to understand.			

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Escrow/Title

<i>Transaction Form</i>			
<b>New/Mod Change</b>	<b>Requested By</b> CT Everett, FNT OC, AllFirst, CO Admin	<b>Incident No.</b>	<b>TFS No.</b> 781724
Updated to show the date of the posted receipt for CT Everett (WA). For CO removed **Cash deposit verified text.			
<b>Affected item(s):</b> Transaction Form			

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FLORIDA

DOCUMENTS

Escrow

<i>Acknowledgment (Survey)</i>			
New/Mod Change	Requested By Trident Title	Incident No.	TFS No. 782355
Revised so that if the Surveyor contact's reference number has not been entered users will receive a prompt for that data.			
<div style="border: 1px solid black; padding: 10px;"> <div style="text-align: right; margin-bottom: 10px;"> <input style="border: 1px solid gray; padding: 2px 5px;" type="text" value="12345"/> </div> <p>I/We, the undersigned buyers/mortgagors of the above referenced property, do hereby acknowledge that we have reviewed the survey of the said property, dated August 2, 2023, prepared by Survey 100, under job no. 12345, and are aware that our Owners Policy will not provide coverage for the encroachments and/or violations shown on the survey which include, but are not limited to the following.</p> </div>			
<p><b>Affected item(s):</b> Acknowledgment (Survey)</p>			

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<i>Affidavit (Homestead)</i>			
New/Mod Change	Requested By FL State Counsel	Incident No.	TFS No. 780147
Updated to reflect the most recent version provided by state counsel.			
<p><b>Affected item(s):</b> Affidavit (Homestead)</p>			

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<i>Affidavit (Tax Deed)</i>			
New/Mod Change	Requested By Majesty Title	Incident No.	TFS No. 781298
Revised to be in recordable format.			
<p><b>Affected item(s):</b> Affidavit (Tax Deed)</p>			

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<i>Updated Construction Forms (6)</i>			
New/Mod Change	Requested By FL State Counsel	Incident No.	TFS No. 781284
Updated to reflect most recent versions provided by Florida State Counsel.			
<p><b>Affected item(s):</b> Affidavit (Construction - Owner's) Affidavit (Contractor's Final Payment) Agreement (Indemnity - Construction) Notice of Termination Notice of Termination with Contractor's Affidavit Waiver and Release of Lien Upon Final Payment</p>			

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HAWAII

DOCUMENTS

Escrow

<i>Demands (13)</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	TG HI		782619
Updated so that the Central Processing Dept. address pulls for users under "FNF INDIA TITLE SOLUTIONS".			
<b>Affected item(s):</b>			
Demand (Condition of Mortgage A-S or PMM)			
Demand (Foreclosure Maintenance Verification)			
Demand (Lease Rent Verification)			
Demand (Lender - TG)			
Demand (Lender Indiv)			
Demand (Lien Judgmt Buyer-Shared Apprec Payoff)			
Demand (Maint-Assoc-Sewer)			
Demand (Mortgagee Assumption Statement)			
Demand (Paydown Subord Lien)			
Demand (Payoff-Paydown Unsecured Loan)			
Demand (Rollback Tax)			
Demand (Status Request)			
Demand (Tenant Rental Verification)			

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<i>Letter (Final - Credit Card Paydown)</i>			
<i>Letter (Final Credit Card Payment)</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	Title Guaranty		780531
Title has changed to "Letter (Final Credit Card Payment)". Updated to streamline the credit card payment process by eliminating extra payment letter(s) and modified this document to cover the recommended process. Please render to view in full.			
<b>Affected item(s):</b>			
Letter (Final - Credit Card Paydown)			
Letter (Final Credit Card Payment)			

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<i>Verification Checklist</i>			
New/Mod	Requested By	Incident No.	TFS No.
New	TT Salem		782648
New document. Please render to view in full.			
<b>Affected item(s):</b>			
SSCORPD5863.doc - Verification Checklist (New)			

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Title

<i>ALTA Homeowner's Policy of Title Insurance 2021 (HI)</i>			
<b>New/Mod</b> New	<b>Requested By</b> Internal Maintenance	<b>Incident No.</b>	<b>TFS No.</b> 779025
This form is a state and product-specific version of the 2021 ALTA Homeowner's Policy of Title Insurance to be used in lieu of Master Owner's Policy for faster document rendering.			
<b>Affected item(s):</b> HID1441.doc - ALTA Homeowner's Policy of Title Insurance 2021 (HI) (New)			

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INTEGRATIONS

<i>Person Lookup Table Sync</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>Resolved: Issue with Lookup Table column existence checks looking at hard-coded “Order Contact – Person” table versus the current table.</p> <p>Determine if query should be on the “LookupCodeMain” column or the “FilterLookupCodeMain” column.</p> <p>Set the XML configuration value “FNF.Pulse.LookupTableSync.CompanyNotesColumn” to be “.CompanyAlertMessage_FNF#” versus “.PulseNotes#”.</p> <p><b>NOTE:</b> If upgrading to this build, registering the FNF.Pulse.LookupTableSync XML file is not required.</p> <p>Resolved: Bug re-introduced in v1.9.3.0: Error message displaying when importing a person to a Person Lookup Table that did not contain a Company Name column.</p> <p>Company Name column set to no longer be required.</p>			

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MY SCREENS

*Order Information Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Penny Hoskins	<b>Incident No.</b>	<b>TFS No.</b>
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The **Order Information** screen has been modified to include a new field: **FinCen Reporting > CTR Filed**. This change is visible when one of the following **My Screens** is selected:

- > **HI All Screens**
- > **HI Commercial**
- > **HI Commercial C SS**
- > **HI Escrow Screens**
- > **HI Title Screens**

◀ ▶ Order Information

Project name:

Borrower signing date: (None)

Seller signing date: (None)

Settlement date/time: (None)   Estimated date/time

This order has a rescission period

Rescission date: (None)   Include Saturday in rescission period

Disbursement date: (None)

Proration date: (None)   Charge buyer for proration date in all prorations

Escrow office:  Escrow officer/Closer:

Pre-closer/Escrow assistant:

Title office:  Title officer/Examiner:

**FinCen Reporting**

CTR Filed: (None)

**Notes (0)**

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REPORTS

Escrow Fee Comparison			
<b>New/Mod Change</b>	<b>Requested By</b> NW IT - HI Admin	<b>Incident No.</b>	<b>TFS No.</b> 781393
Added Product Type column and updated the estimated fee for Refinance transactions to \$550.			
<b>Affected item(s):</b> Escrow Fee Comparison			

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IDAHO

DOCUMENTS

Escrow

<i>EI - Purchase and Sale (EIS)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	FT ID		780527
Various changes applied per State Counsel's request. Please render to view in full.			
<b>Affected item(s):</b> EI - Purchase and Sale (EIS)			

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<i>Request for Full Reconveyance (Indem of Electronic Note-DOT)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New	CT/FNT Vancouver		782122
New document. Please render to view in full.			
<b>Affected item(s):</b> SSCORPD5861.doc - Request for Full Reconveyance (Indem of Electronic Note-DOT) (New)			

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<i>Verification Checklist</i>			
New/Mod	Requested By	Incident No.	TFS No.
New	TT Salem		782648
New document. Please render to view in full.			
<b>Affected item(s):</b> SSCORPD5863.doc - Verification Checklist (New)			

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Title

<i>ALTA Homeowner's Policy of Title Insurance 2021 (ID)</i>			
<b>New/Mod</b> New	<b>Requested By</b> Internal Maintenance	<b>Incident No.</b>	<b>TFS No.</b> 779036
This form is a state and product-specific version of the 2021 ALTA Homeowner's Policy of Title Insurance to be used in lieu of Master Owner's Policy for faster document rendering.			
<b>Affected item(s):</b> IDD1158.doc - ALTA Homeowner's Policy of Title Insurance 2021 (ID) (New)			

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INTEGRATIONS

<i>Rate Validation Tool</i>			
<b>New/Mod</b>	<b>Requested By</b>	<b>FootPrints No.</b>	<b>DEVOPS No.</b>
Mod			
When determining the effective date of a rate validation request, the timestamp is removed when comparing the Select <b>Date/Time order received</b> field to the <b>Date/time title opened</b> and <b>Date/time escrow opened</b> fields. This determines if the request is a single request or two requests with different effective dates.			

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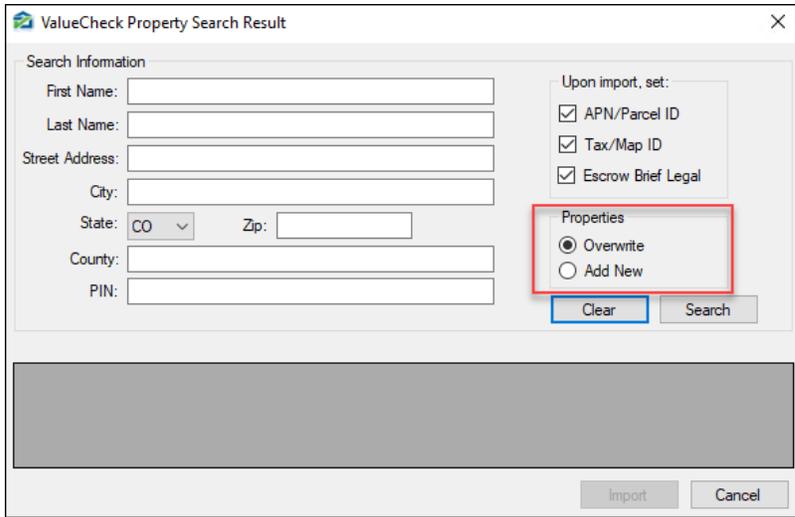
ILLINOIS

INTEGRATIONS

*ValueCheck Property Search (Address Validation)*

New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			

The ability to import multiple properties has been added with the option to overwrite or add new (append) search results.



- > Overwrite – when selected,
  - » all existing properties in the order are removed and the selected properties are imported to the order.
  - » existing Buyer or Seller Contacts in the order are overwritten with the owners associated with the imported properties.
  
- > Add New – when selected, the new properties are added consecutively, after the last existing property. If an existing property address is a duplicate of a property being imported, that property will not be imported.
  
- > Order contacts are created when:
  - » A Buyer contact is created when a Buyer nor Seller exist in the order and Transaction Type is not a Purchase.
  - » A Buyer contact is created when one to multiple Buyers exist in the order and no Seller contact.
  - » A Seller contact is created when a Buyer nor Seller exist in the order and Transaction Type is a Purchase.
  - » A Seller contact is created when one to multiple Sellers and one to multiple Buyers exist in the order.
  - » A Seller contact is created when one to multiple Sellers exist in the order and no Buyer exist.
  
- > Order contacts are not created when:
  - » When at least one “Own1” field is populated with a value and all “Own2” fields are empty and the Select contact equals the “Own1” values.
  - » When at least one “Own2” field is populated with a value and all “Own1” fields are empty and the Select contact equals the “Own2” values.

*ValueCheck Property Search (Address Validation)*

- » When at least one “Own1” field and at least one “Own2” field is populated with a value:
  - If “Yes” is selected on the option to combine contacts: A new contact is not created when the Select contact Individual1 values equal the “Own1” values and the Select contact Individual2 values equal the “Own2” values.
  - If “No” is selected on the option to combine contacts: A new contact is not created when the Select contact values equal the “Own1” values or when the Select contact values equal the “Own2” values.
- › Confirmation message displays when a buyer or seller contact is being removed.
- › The Order Transaction type will be used to determine if the buyer or seller need to be updated.
  - » Purchase transaction – only seller contact will be updated, added or deleted
  - » All other transaction – only buyer contact will be updated, added or deleted
- › Search results no longer default the **Select** check box to be checked on the first property.

Resolved: The APN, Tax/Map ID and Escrow Brief Legal check boxes were not persisting when re-opening the Property Search Results dialog. Two configurable settings have been added to the ValueCheck XML: DefaultImportSettings and SaveImportSettings.

Resolved: Contact being deleted and re-added when using the Overwrite option.

The tool will now replace the data within the existing contact by overwriting the fields allowed by ValueCheck.

Resolved: Buyer contacts being deleted when importing owner into Purchase order.

Resolved: Buyer and Seller middle name not being imported.

Resolved: Error displayed when importing Range and Township data due to conflict in format (data received is a string value and the ProForm field is an integer).

Data is now parsed as:

- » If Range value in response is not empty
  - Accept string values of zero to many characters.
  - The first ten numeric values, up to 10, go to Order.Properties[].TownshipRange.Range.
  - The first non-numeric value goes to Order.Properties[].TownshipRange.RangeDirection.
  - All other characters are ignored.
  - Error message will be written when the numeric data exceeds 10 values.
  - Error message will be written when the non-numeric data exceeds 1 value.
- » If Township value in response is not empty
  - Accept string values of zero to many characters.
  - The first ten numeric values, up to 10, go to Order.Properties[].TownshipRange.Township.
  - The first non-numeric value goes to Order.Properties[].TownshipRange.TownshipDirection.
  - All other characters are ignored.
  - Error message will be written when the numeric data exceeds 10 values.
  - Error message will be written when the non-numeric data exceeds 1 value.



INDIANA

DOCUMENTS

Escrow

<a href="#"><i>Letter (Chain of Title - Alternate Contact)</i></a>			
<b>New/Mod</b> New	<b>Requested By</b> FNT IN Commercial	<b>Incident No.</b>	<b>TFS No.</b> 782617
Set up to prompt users for the addressee and salutation contact(s).			
<b>Affected item(s):</b> IND1366.doc - Letter (Chain of Title - Alternate Contact) (New)			

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Title

<i>ALTA Homeowner's Policy of Title Insurance 2021 (IN)</i>			
<b>New/Mod</b> New	<b>Requested By</b> Internal Maintenance	<b>Incident No.</b>	<b>TFS No.</b> 780104
This form is a state and product-specific version of the 2021 ALTA Homeowner's Policy of Title Insurance to be used in lieu of Master Owner's Policy for faster document rendering.			
<b>Affected item(s):</b> IND1364.doc - ALTA Homeowner's Policy of Title Insurance 2021 (IN) (New)			

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KANSAS

INTEGRATIONS

<i>ValueCheck (LinkIt)</i>			
<b>New/Mod</b> Mod	<b>Requested By</b>	<b>FootPrints No.</b>	<b>DEVOPS No.</b>
<p>Resolved: Red text displays regardless of requirement/exception will be hyperlinked.</p> <p style="padding-left: 40px;">Requirements and exceptions not in RTF format will no longer be converted to RTF nor sent to ValueCheck.</p> <p>Resolved: Part of the Vesting name cut off.</p>			

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<i>Rate Validation Tool</i>			
<b>New/Mod</b> Mod	<b>Requested By</b>	<b>FootPrints No.</b>	<b>DEVOPS No.</b>
<p>When determining the effective date of a rate validation request, the timestamp is removed when comparing the Select <b>Date/Time order received</b> field to the <b>Date/time title opened</b> and <b>Date/time escrow opened</b> fields. This determines if the request is a single request or two requests with different effective dates.</p>			

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LOUISIANA

INTEGRATIONS

<a href="#">ValueCheck (LinkIt)</a>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>Resolved: Red text displays regardless of requirement/exception will be hyperlinked. Requirements and exceptions not in RTF format will no longer be converted to RTF nor sent to ValueCheck.</p> <p>Resolved: Part of the Vesting name cut off.</p>			

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MARYLAND

DOCUMENTS

Escrow

<i>Outgoing Wire Information</i>			
<b>New/Mod</b>	<b>Requested By</b>	<b>Incident No.</b>	<b>TFS No.</b>
New	MD Commercial Counsel		780160
New document. Please render to view in full.			
<b>Affected item(s):</b> MDD1141.doc - Outgoing Wire Information (New)			

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MICHIGAN

DOCUMENTS

Escrow

<i>El - Disbursements (2)</i>			
<b>New/Mod</b> Change	<b>Requested By</b> CT MI	<b>Incident No.</b>	<b>TFS No.</b> 783178
Removed the Deposit in Local Bank option.			
<b>Affected item(s):</b> El - Disbursement El - Disbursement (Legal)			

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<i>Tax Certification</i>			
<b>New/Mod</b> New	<b>Requested By</b> FT MI	<b>Incident No.</b>	<b>TFS No.</b> 780157
New document. Please render to view in full.			
<b>Affected item(s):</b> MID1362.doc - Tax Certification (New)			

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Title

<i>Date Down (MI MORT09)</i>			
<b>New/Mod Change</b>	<b>Requested By</b> MI CT	<b>Incident No.</b>	<b>TFS No.</b> 782059
At the direction of state counsel, the endorsement has been modified so "Enter the amended amount of insurance" is no longer a required field. If the field is left empty "N/A" will be reflected on the form.			

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MONTANA

DOCUMENTS

Escrow

<i>Request for Full Reconveyance (Indem of Electronic Note-DOT)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New	CT/FNT Vancouver		782122
New document. Please render to view in full.			
<b>Affected item(s):</b> SSCORPD5861.doc - Request for Full Reconveyance (Indem of Electronic Note-DOT) (New)			

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<i>Verification Checklist</i>			
New/Mod	Requested By	Incident No.	TFS No.
New	TT Salem		782648
New document. Please render to view in full.			
<b>Affected item(s):</b> SSCORPD5863.doc - Verification Checklist (New)			

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Title

<a href="#">MT ALTA Homeowner's Policy of Title Insurance 2021 (MT)</a>			
<b>New/Mod</b> New	<b>Requested By</b> Internal Maintenance	<b>Incident No.</b>	<b>TFS No.</b> 779039
This form is a state and product-specific version of the 2021 ALTA Homeowner's Policy of Title Insurance to be used in lieu of Master Owner's Policy for faster document rendering.			
<b>Affected item(s):</b> MTD0233.doc - ALTA Homeowner's Policy of Title Insurance 2021 (MT) (New)			

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MY SCREENS

Order Contact Screen

<b>New/Mod</b> Mod	<b>Requested By</b> Penny Hoskins	<b>Incident No.</b>	<b>TFS No.</b>
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All **Order Contacts** have been updated to include the **CO Alert Message** field.

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

- > MT All Screens
- > MT Escrow Screens
- > MT Title Screens

The screenshot displays two overlapping forms: 'Abstractor' (top) and 'Seller' (bottom). Both forms have a 'CO Alert Message' field highlighted with a red circle. The 'Abstractor' form includes fields for 'Lookup code', 'Name', 'Short name', 'Payee name', 'Address', 'City/State/Zip', 'County', 'Phone', 'Email address', 'Fee transfer ledger', 'Anticipate funds as', and 'Anticipate disbursement'. The 'Seller' form includes fields for 'Seller' type (Individual/Organization), 'Type' (Male), 'First', 'Middle', 'Last', 'Suffix', 'Relationship', 'SSN', 'Courtesy title', 'A.K.A. name', 'Marketing source', 'Marketing rep.' (1, 2, 3), 'Anticipate funds as', and 'Anticipate disbursement as'. Both forms also feature 'Save And Add New' buttons and checkboxes for 'Include on revenue reports', 'Marketing source', and 'Commitment recipient'.

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NEBRASKA

INTEGRATIONS

<a href="#">ValueCheck (LinkIt)</a>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>Resolved: Red text displays regardless of requirement/exception will be hyperlinked. Requirements and exceptions not in RTF format will no longer be converted to RTF nor sent to ValueCheck.</p> <p>Resolved: Part of the Vesting name cut off.</p>			

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NEVADA

DOCUMENTS

Escrow

<i>Annexation - Falcon Ridge</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	Ticor Title, Las Vegas		783601
Removed the box from the top left and added the system date to the first paragraph.			
<b>Affected item(s):</b> Annexation - Falcon Ridge			

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<i>New Documents (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	CT Vegas	INC230294953	781466
New documents. Please render to view in full.			
<b>Affected item(s):</b> NVD1359.doc - Notice of Modification - Amendment to Deed of Trust (New) NVD1360.doc - Instruction to Escrow (New)			

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<i>Note Modification (String)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	CT Vegas	INC230294953	781466
Replaced "Note Modification (Application and Consent)" with "Note Modification (String)". Please render to view in full.			
<b>Affected item(s):</b> Note Modification (String)			

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<i>Release (Mechanic's Lien)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	FT NV		780529
Updated to work for 'Mechanic's Liens' as well as 'Liens'.			
<b>Affected item(s):</b> Release (Mechanic's Lien)			

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Title

<i>ALTA Homeowner's Policy of Title Insurance 2021 (NV)</i>			
<b>New/Mod</b> New	<b>Requested By</b> Internal Maintenance	<b>Incident No.</b>	<b>TFS No.</b> 779024
This form is a state and product-specific version of the 2021 ALTA Homeowner's Policy of Title Insurance to be used in lieu of Master Owner's Policy for faster document rendering.			
<b>Affected item(s):</b> NVD1358.doc - ALTA Homeowner's Policy of Title Insurance 2021 (NV) (New)			

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<i>CLTA Preliminary Report Form 2006 (NV)</i>			
<b>New/Mod</b> Change	<b>Requested By</b> CPF	<b>Incident No.</b>	<b>TFS No.</b> 780617
Added "Fidelity National Title Group" to the Issuing Office table.			
<b>Affected item(s):</b> CLTA Preliminary Report Form 2006 (NV)			

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INTEGRATIONS

*Rate Validation Tool*

<b>New/Mod</b> Mod	<b>Requested By</b>	<b>FootPrints No.</b>	<b>DEVOPS No.</b>
-----------------------	---------------------	-----------------------	-------------------

The **Loan Liability Amount** question removed from the **Escrow Only** view on the **Rate Summary View** tab. When applicable, the value of the combined loans in the Select order will be transmitted in the request automatically.

The screenshot shows the 'Rate Summary View (45)' interface. At the top, there are tabs for 'Rate Summary View (45)' and 'Audit View'. Below the tabs are radio buttons for 'Title Only', 'Escrow only' (which is selected), and 'Title & Escrow'. A 'Save & Close' button is located in the top right. The 'General' section contains several fields: 'Loan Liability Amount (If multiple loans, enter the amount of the loan with the highest liability.)' which is circled in red and has a black arrow pointing to it with the word 'REMOVED'; 'How many loan policies are involved in the transaction?' with a value of '1'; and 'Does the transaction involve a sale of property?'.

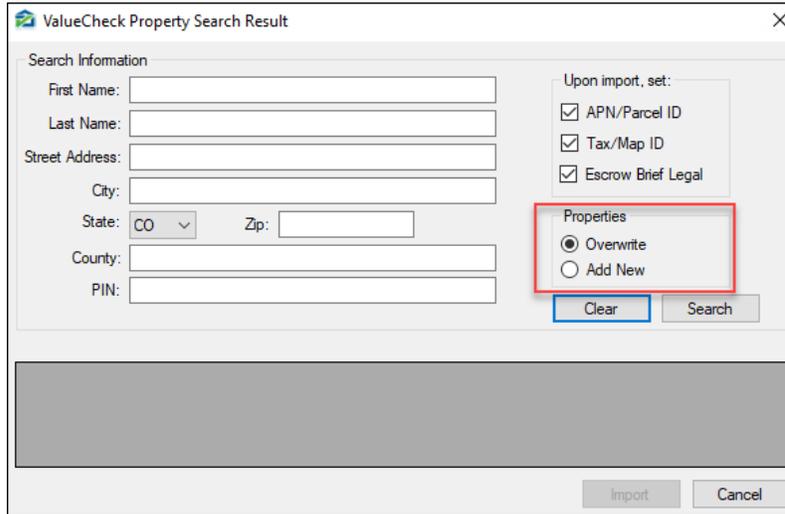
When determining the effective date of a rate validation request, the timestamp is removed when comparing the Select **Date/Time order received** field to the **Date/time title opened** and **Date/time escrow opened** fields. This determines if the request is a single request or two requests with different effective dates.

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*ValueCheck Property Search (Address Validation)*

New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			

The ability to import multiple properties has been added with the option to overwrite or add new (append) search results.



- › Overwrite – when selected,
  - » all existing properties in the order are removed and the selected properties are imported to the order.
  - » existing Buyer or Seller Contacts in the order are overwritten with the owners associated with the imported properties.
- › Add New – when selected, the new properties are added consecutively, after the last existing property. If an existing property address is a duplicate of a property being imported, that property will not be imported.
- › Order contacts are created when:
  - » A Buyer contact is created when a Buyer nor Seller exist in the order and Transaction Type is not a Purchase.
  - » A Buyer contact is created when one to multiple Buyers exist in the order and no Seller contact.
  - » A Seller contact is created when a Buyer nor Seller exist in the order and Transaction Type is a Purchase.
  - » A Seller contact is created when one to multiple Sellers and one to multiple Buyers exist in the order.
  - » A Seller contact is created when one to multiple Sellers exist in the order and no Buyer exist.
- › Order contacts are not created when:
  - » When at least one “Own1” field is populated with a value and all “Own2” fields are empty and the Select contact equals the “Own1” values.
  - » When at least one “Own2” field is populated with a value and all “Own1” fields are empty and the Select contact equals the “Own2” values.
  - » When at least one “Own1” field and at least one “Own2” field is populated with a value:

*ValueCheck Property Search (Address Validation)*

- If "Yes" is selected on the option to combine contacts: A new contact is not created when the Select contact Individual1 values equal the "Own1" values and the Select contact Individual2 values equal the "Own2" values.
  - If "No" is selected on the option to combine contacts: A new contact is not created when the Select contact values equal the "Own1" values or when the Select contact values equal the "Own2" values.
- › Confirmation message displays when a buyer or seller contact is being removed.
  - › The Order Transaction type will be used to determine if the buyer or seller need to be updated.
    - » Purchase transaction – only seller contact will be updated, added or deleted
    - » All other transaction – only buyer contact will be updated, added or deleted
  - › Search results no longer default the **Select** check box to be checked on the first property.

Resolved: The APN, Tax/Map ID and Escrow Brief Legal check boxes were not persisting when re-opening the Property Search Results dialog. Two configurable settings have been added to the ValueCheck XML: DefaultImportSettings and SaveImportSettings.

Resolved: Contact being deleted and re-added when using the Overwrite option.

The tool will now replace the data within the existing contact by overwriting the fields allowed by ValueCheck.

Resolved: Buyer contacts being deleted when importing owner into Purchase order.

Resolved: Buyer and Seller middle name not being imported.

Resolved: Error displayed when importing Range and Township data due to conflict in format (data received is a string value and the ProForm field is an integer).

Data is now parsed as:

- » If Range value in response is not empty
  - Accept string values of zero to many characters.
  - The first ten numeric values, up to 10, go to Order.Properties[].TownshipRange.Range.
  - The first non-numeric value goes to Order.Properties[].TownshipRange.RangeDirection.
  - All other characters are ignored.
  - Error message will be written when the numeric data exceeds 10 values.
  - Error message will be written when the non-numeric data exceeds 1 value.
- » If Township value in response is not empty
  - Accept string values of zero to many characters.
  - The first ten numeric values, up to 10, go to Order.Properties[].TownshipRange.Township.
  - The first non-numeric value goes to Order.Properties[].TownshipRange.TownshipDirection.
  - All other characters are ignored.
  - Error message will be written when the numeric data exceeds 10 values.
  - Error message will be written when the non-numeric data exceeds 1 value.



NEW HAMPSHIRE

DOCUMENTS

Title

<i>Letter (PRO FORMA Policy Cover)</i>			
<b>New/Mod</b> New	<b>Requested By</b> New England Agency	<b>Incident No.</b>	<b>TFS No.</b> 782781
Revised to prompt for the date:			
<div style="border: 1px solid black; padding: 10px;"> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 10px;"> <p>Owner's Policy (\$488,500.00)</p> <p>Enter the date</p> <p style="color: red;">08/31/2023</p> </div> <div style="margin-left: 20px;"> <p>PRO FORMA POLICY</p> <p>File No.: <span style="color: blue;">JM CD Test 2023</span></p> <p>Dated: <span style="background-color: yellow;">August 31, 2023</span></p> <p>This is a Pro Forma Title Policy for review purposes only which provides <u>no insurance coverage</u> to or on behalf of the proposed insured. This Pro Forma Policy does not necessarily reflect the present status or condition of title and is not a Commitment to insure the estate or interest or to provide any affirmative coverage shown herein. This Pro Forma Policy solely indicates the form and content of the policy which the Company may issue if:</p> </div> </div>			
<b>Affected item(s):</b>			
Letter (PRO FORMA Policy Cover)			

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NEW JERSEY

DOCUMENTS

Escrow

<i>County Search Request</i>			
<b>New/Mod</b> Change	<b>Requested By</b> CT NJ	<b>Incident No.</b>	<b>TFS No.</b> 782409
Updated to pull NJ.Vendors and their fax for all operations.			
<b><u>Affected item(s):</u></b> County Search Request			

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INTEGRATIONS

<i>Rate Validation Tool</i>			
<b>New/Mod</b>	<b>Requested By</b>	<b>FootPrints No.</b>	<b>DEVOPS No.</b>
Mod			
When determining the effective date of a rate validation request, the timestamp is removed when comparing the Select <b>Date/Time order received</b> field to the <b>Date/time title opened</b> and <b>Date/time escrow opened</b> fields. This determines if the request is a single request or two requests with different effective dates.			

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NEW MEXICO

INTEGRATIONS

<i>Person Lookup Table Sync</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>Resolved: Issue with Lookup Table column existence checks looking at hard-coded “Order Contact – Person” table versus the current table.</p> <p>Determine if query should be on the “LookupCodeMain” column or the “FilterLookupCodeMain” column.</p> <p>Set the XML configuration value “FNF.Pulse.LookupTableSync.CompanyNotesColumn” to be “.CompanyAlertMessage_FNF#” versus “.PulseNotes#”.</p> <p><b>NOTE:</b> If upgrading to this build, registering the FNF.Pulse.LookupTableSync XML file is not required.</p> <p>Resolved: Bug re-introduced in v1.9.3.0: Error message displaying when importing a person to a Person Lookup Table that did not contain a Company Name column.</p> <p>Company Name column set to no longer be required.</p>			

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<i>ValueCheck (LinkIt)</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>Resolved: Red text displays regardless of requirement/exception will be hyperlinked.</p> <p>Requirements and exceptions not in RTF format will no longer be converted to RTF nor sent to ValueCheck.</p> <p>Resolved: Part of the Vesting name cut off.</p>			

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NEW YORK

DOCUMENTS

Escrow

<a href="#">Cover Letter</a>			
<b>New/Mod</b> Change	<b>Requested By</b> Riverhead	<b>Incident No.</b>	<b>TFS No.</b> 780164
Updated the hardcoded Ellen McDonald to look to the completed by contact on the checklist task screen.			
<b>Affected item(s):</b> Cover Letter			

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OHIO

DOCUMENTS

Escrow

<a href="#"><i>Agreement for Performance of Settlement Services</i></a>			
<b>New/Mod</b> New	<b>Requested By</b> State Counsel	<b>Incident No.</b>	<b>TFS No.</b> 782610
New document. Please render to view in full.			
<b>Affected item(s):</b> OHD1393.doc - Agreement for Performance of Settlement Services (New)			

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INTEGRATIONS

<i>Rate Validation Tool</i>			
<b>New/Mod</b>	<b>Requested By</b>	<b>FootPrints No.</b>	<b>DEVOPS No.</b>
Mod			
<p>The following Policy codes have been mapped to New Loans Transaction Type allowing the use of the Rate Validation Tool to validate rates on a loan-only purchase transaction.</p> <ul style="list-style-type: none"><li>&gt; <b>OHXX-01-Short Form Loan Policy</b></li><li>&gt; <b>OHXX-02-Standard Loan Policy</b></li><li>&gt; <b>OHXX-03-Expanded Loan Policy</b></li><li>&gt; <b>OHXX-04-Short Form Expanded Loan Policy</b></li></ul>			

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OKLAHOMA

DOCUMENTS

Escrow

<i>Survey Order Request</i>			
<b>New/Mod</b> Change	<b>Requested By</b> CT OK	<b>Incident No.</b>	<b>TFS No.</b> 781295
Added the Listing Agent to the form. If there is no Listing Agent, Seller's information will pull in.			
<b>Affected item(s):</b> Survey Order Request			

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Title

<i>ALTA Homeowner's Policy of Title Insurance 2021 (OK)</i>			
<b>New/Mod</b> New	<b>Requested By</b> Internal Maintenance	<b>Incident No.</b>	<b>TFS No.</b> 779073
This form is a state and product-specific version of the 2021 ALTA Homeowner's Policy of Title Insurance to be used in lieu of Master Owner's Policy for faster document rendering.			
<b>Affected item(s):</b> OKD1314.doc - ALTA Homeowner's Policy of Title Insurance 2021 (OK) (New)			

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INTEGRATIONS

<i>ValueCheck (LinkIt)</i>			
<b>New/Mod</b>	<b>Requested By</b>	<b>FootPrints No.</b>	<b>DEVOPS No.</b>
Mod			
<p>Resolved: Red text displays regardless of requirement/exception will be hyperlinked. Requirements and exceptions not in RTF format will no longer be converted to RTF nor sent to ValueCheck.</p> <p>Resolved: Part of the Vesting name cut off.</p>			

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REPORTS

Escrow/Title

<i>Transaction Form</i>			
<b>New/Mod</b>	<b>Requested By</b>	<b>Incident No.</b>	<b>TFS No.</b>
Change	CT Everett, FNT OC, AllFirst, CO Admin		781724
Updated to show the date of the posted receipt for CT Everett (WA). For CO removed **Cash deposit verified text.			
<b><u>Affected item(s):</u></b> Transaction Form			

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OREGON

DOCUMENTS

Escrow

<i>Affidavit (Indemnity Agreement by Owner) (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	CT Portland		780524
Added logic to be able to pull "NONE" to items 5 and 6.			
<b>Affected item(s):</b> Affidavit (Indemnity Agreement by Owner - Legal) Affidavit (Indemnity Agreement by Owner)			

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<i>Bill of Sale</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	CT Portland		780167
Updated the first paragraph to combine the two sentences into one.			
<b>Affected item(s):</b> Bill of Sale			

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<i>Recording Cover Sheet</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	TT Salem		781458
Updated to reflect the most recently provided version. Please render to view in full.			
<b>Affected item(s):</b> Recording Cover Sheet			

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<i>Request for Full Reconveyance (Indem of Electronic Note-DOT)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New	CT/FNT Vancouver		782122
New document. Please render to view in full.			
<b>Affected item(s):</b> SSCORPD5861.doc - Request for Full Reconveyance (Indem of Electronic Note-DOT) (New)			

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<i>Verification Checklist</i>			
New/Mod	Requested By	Incident No.	TFS No.
New	TT Salem		782648
New document. Please render to view in full.			
<b>Affected item(s):</b> SSCORPD5863.doc - Verification Checklist (New)			

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<i>Verification of Commission</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	TT Medford		781455
Updated to optionally included Disbursement options.			
<b>Affected item(s):</b> Verification of Commission			

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Title

<i>Oregon Title Insurance Rating Bureau (OTIRO) Form Filing - Effective September 4, 2023</i>			
<b>New/Mod</b> New	<b>Requested By</b> Form Filing	<b>Incident No.</b>	<b>TFS No.</b> 779290
<p>The following forms will be revised, added or removed (as indicated below) as of the September 4, 2023 effective date:</p> <ul style="list-style-type: none"> <li>• PLO-03 ALTA Residential Limited Coverage Mortgage Modification Policy to include (12-01-14) - Modified to remove Condition 16</li> <li>• PLO-04 ALTA Residential Limited Coverage Mortgage Modification Policy (04-02-2022) - NEW</li> <li>• OTIRO 223.1-06 - Co-Insurance - Multiple Policies (ALTA 23.1-06) (08-01-2017) - Withdrawn - will be Removed</li> <li>• OTIRO 223.1 - Co-Insurance - Multiple Policies (ALTA 23.1 - 2022) (05-12-2022) - NEW</li> <li>• Endorsements 51, 51.1, 51.2, 62.3, 69.1, 69.2, 77.1, 86, 108, 223.1-06 - Withdrawn - will be Removed</li> <li>• Endorsements 45, 46, 57, 60, 66, 77, 78, 81, 85, 89, 90.2, 92, 93, 98, 101 - Technical Corrections - will be modified</li> <li>• Endorsements 62.2, 64, 67, 70, 76, 79.2, 80, 87, 88, 90, 102-06 - Revised - NEW 2023 versions</li> </ul>			

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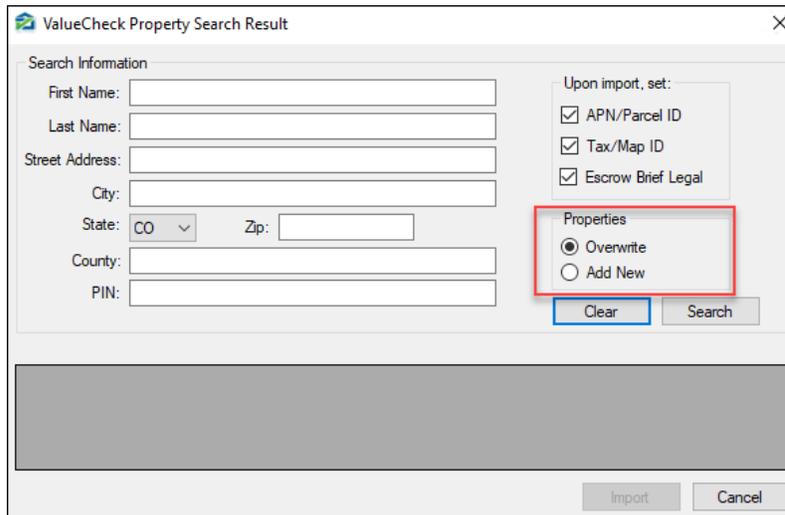
INTEGRATIONS

<i>Rate Validation Tool</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>When determining the effective date of a rate validation request, the timestamp is removed when comparing the Select <b>Date/Time order received</b> field to the <b>Date/time title opened</b> and <b>Date/time escrow opened</b> fields. This determines if the request is a single request or two requests with different effective dates.</p>			

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<i>ValueCheck Property Search (Address Validation)</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			

The ability to import multiple properties has been added with the option to overwrite or add new (append) search results.



- > Overwrite – when selected,
  - » all existing properties in the order are removed and the selected properties are imported to the order.
  - » existing Buyer or Seller Contacts in the order are overwritten with the owners associated with the imported properties.
- > Add New – when selected, the new properties are added consecutively, after the last existing property. If an existing property address is a duplicate of a property being imported, that property will not be imported.
- > Order contacts are created when:
  - » A Buyer contact is created when a Buyer nor Seller exist in the order and Transaction Type is not a Purchase.
  - » A Buyer contact is created when one to multiple Buyers exist in the order and no Seller contact.
  - » A Seller contact is created when a Buyer nor Seller exist in the order and Transaction Type is a Purchase.

*ValueCheck Property Search (Address Validation)*

- » A Seller contact is created when one to multiple Sellers and one to multiple Buyers exist in the order.
- » A Seller contact is created when one to multiple Sellers exist in the order and no Buyer exist.
- › Order contacts are not created when:
  - » When at least one "Own1" field is populated with a value and all "Own2" fields are empty and the Select contact equals the "Own1" values.
  - » When at least one "Own2" field is populated with a value and all "Own1" fields are empty and the Select contact equals the "Own2" values.
  - » When at least one "Own1" field and at least one "Own2" field is populated with a value:
    - If "Yes" is selected on the option to combine contacts: A new contact is not created when the Select contact Individual1 values equal the "Own1" values and the Select contact Individual2 values equal the "Own2" values.
    - If "No" is selected on the option to combine contacts: A new contact is not created when the Select contact values equal the "Own1" values or when the Select contact values equal the "Own2" values.
- › Confirmation message displays when a buyer or seller contact is being removed.
- › The Order Transaction type will be used to determine if the buyer or seller need to be updated.
  - » Purchase transaction – only seller contact will be updated, added or deleted
  - » All other transaction – only buyer contact will be updated, added or deleted
- › Search results no longer default the **Select** check box to be checked on the first property.

Resolved: The APN, Tax/Map ID and Escrow Brief Legal check boxes were not persisting when re-opening the Property Search Results dialog. Two configurable settings have been added to the ValueCheck XML: DefaultImportSettings and SaveImportSettings.

Resolved: Contact being deleted and re-added when using the Overwrite option.

The tool will now replace the data within the existing contact by overwriting the fields allowed by ValueCheck.

Resolved: Buyer contacts being deleted when importing owner into Purchase order.

Resolved: Buyer and Seller middle name not being imported.

Resolved: Error displayed when importing Range and Township data due to conflict in format (data received is a string value and the ProForm field is an integer).

Data is now parsed as:

- » If Range value in response is not empty
  - Accept string values of zero to many characters.
  - The first ten numeric values, up to 10, go to Order.Properties[].TownshipRange.Range.
  - The first non-numeric value goes to Order.Properties[].TownshipRange.RangeDirection.
  - All other characters are ignored.
  - Error message will be written when the numeric data exceeds 10 values.
  - Error message will be written when the non-numeric data exceeds 1 value.

*ValueCheck Property Search (Address Validation)*

- » If Township value in response is not empty
  - Accept string values of zero to many characters.
  - The first ten numeric values, up to 10, go to Order.Properties[].TownshipRange.Township.
  - The first non-numeric value goes to Order.Properties[].TownshipRange.TownshipDirection.
  - All other characters are ignored.
  - Error message will be written when the numeric data exceeds 10 values.
  - Error message will be written when the non-numeric data exceeds 1 value.

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MY SCREENS

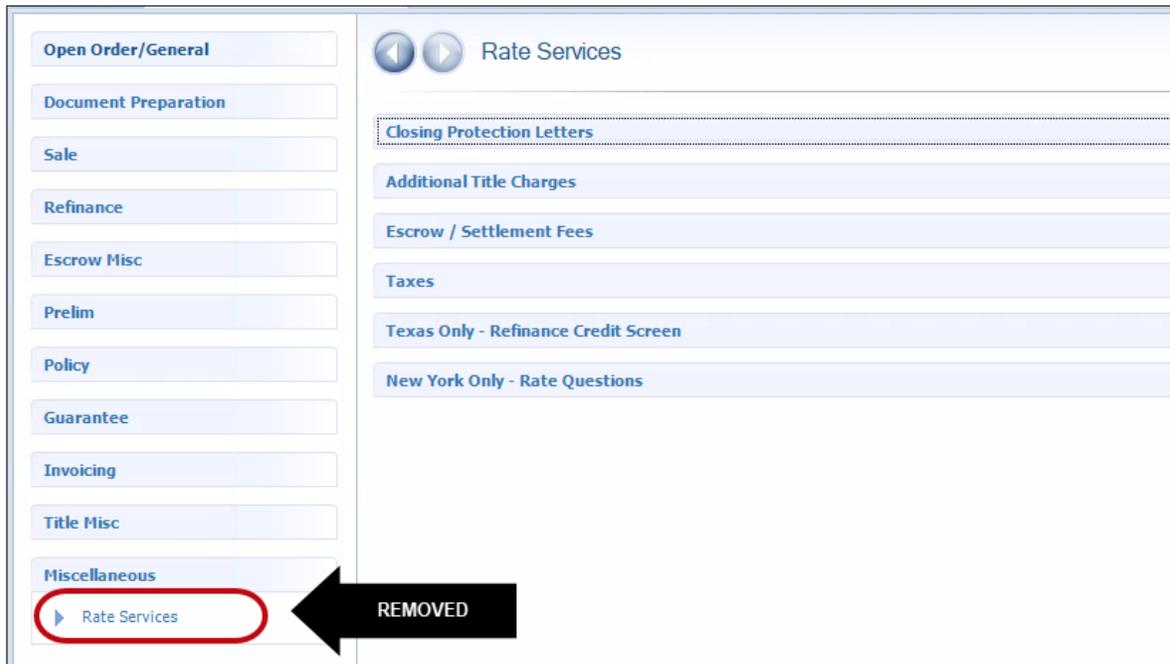
*Rate Services Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Brad Bivens	<b>Incident No.</b>	<b>TFS No.</b>
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The **Rate Services** screen has been removed.

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

My Screen	Section Screen Removed From Based on My Screen Selection					
	Sale	Refinance	Prelim	Miscellaneous	Commercial /Sale	Commercial /Refinance
OR All Screens	✓	✓	✓	✓		
OR Commercial				✓	✓	✓
OR Commercial CSS				✓	✓	✓
OR Escrow Screens	✓	✓		✓		
OR Title Screens			✓	✓		
Oregon RLC Screens	✓	✓		✓		



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PENNSYLVANIA

DOCUMENTS

Title

<a href="#">ALTA Commitment 2021 (PA)</a>			
<b>New/Mod Change</b>	<b>Requested By Form Filing</b>	<b>Incident No.</b>	<b>TFS No. 781415</b>
<p>The ALTA Commitment 2021 for Pennsylvania will be revised to include the new Notices page, per the PA Form Filing as of the September 1, 2023 effective date.</p> <div style="border: 1px solid black; padding: 20px; margin: 10px 0;"> <p style="text-align: center;"><u>CHICAGO TITLE INSURANCE COMPANY</u> <span style="float: right;"><u>COMMITMENT NO. 12345</u></span></p> <p style="text-align: center;"><b>NOTICES</b></p> <ol style="list-style-type: none"> <li>1. PLEASE BE ADVISED THAT Chicago Title Insurance Company ("COMPANY") AND Title Company Name ("AGENT") HAVE NO KNOWLEDGE, TRAINING OR EXPERIENCE IN MATTERS THAT ARE UNRELATED TO TITLE INSURANCE, INCLUDING, BUT NOT LIMITED TO, SUCH MATTERS AS BULK SALE TRANSFERS, BULK SALE CLEARANCE CERTIFICATE REQUIREMENTS (IF APPLICABLE), ZONING/SUBDIVISION, STRUCTURAL REPAIRS, ENVIRONMENTAL, WATER INFILTRATION, WETLANDS, TERMITES OR ONSITE SEWAGE SYSTEMS, AND WE DO NOT INTEND TO, AND CANNOT, PROVIDE SERVICES OR ADVICE TO YOU ON SUCH MATTERS. IF YOU ARE FACED WITH ISSUES REGARDING SUCH MATTERS, YOU SHOULD CONSULT A LAWYER, ENGINEER, ARCHITECT OR OTHER APPROPRIATE CONSULTANT OR PROFESSIONAL OF YOUR CHOICE.</li> <li>2. ALSO BE ADVISED THAT YOU MAY PURCHASE AT ADDITIONAL COST ENHANCED COVERAGES FROM THE BASIC POLICY OF TITLE INSURANCE. IF YOU WISH AN EXPLANATION OF THE ENHANCED COVERAGES AND THE COST FOR THESE ADDITIONAL COVERAGES, PLEASE CONTACT THE PARTY LISTED BELOW.</li> <li>3. THE COMMONWEALTH OF PENNSYLVANIA DEPARTMENT OF INSURANCE REQUIRES THAT WE SEND THE FOLLOWING NOTICE TO YOU, OUR APPLICANT, PRIOR TO CLOSING. IF APPLICABLE, THE DEPARTMENT FURTHER REQUIRE THAT YOU, THE APPLICANT, FORWARD THIS NOTICE TO THE ULTIMATE CONSUMER IN ADVANCE OF THE DAY OF CLOSING: <ul style="list-style-type: none"> <li>YOUR TITLE INSURANCE FEE COVERS THE COST OF CLOSING ON THE INSURED REAL ESTATE PROPERTY IF IT TAKES PLACE DURING REGULAR OFFICE HOURS AND AT THE OFFICE OF THE TITLE INSURANCE AGENT OR UNDERWRITER. IF YOUR CLOSING TAKES PLACE AT A LOCATION OR TIME OF YOUR CHOOSING, OR THAT OF YOUR LENDER OR REALTOR, THE TITLE INSURANCE AGENT OR UNDERWRITER MAY IMPOSE AN ADDITIONAL CHARGE FOR THIS SPECIAL SERVICE. YOU MAY DETERMINE THE AMOUNT OF THIS ADDITIONAL CHARGE, IF ANY, BY CONTACTING THE PARTY LISTED BELOW.</li> </ul> <p style="margin-left: 40px;">Title Company Name 236 Quarry Road, Suite 202 Anywhere, PA 99999 (831)555-5557</p> </li> </ol> </div> <p style="font-size: small; margin-top: 20px;">This page is only a part of a 2021 ALTA Commitment for Title Insurance issued by Chicago Title Insurance Company. This Commitment is not valid without the Notice, the Commitment to Issue Policy, the Commitment Amendment, Schedule A, Schedule B.</p>			

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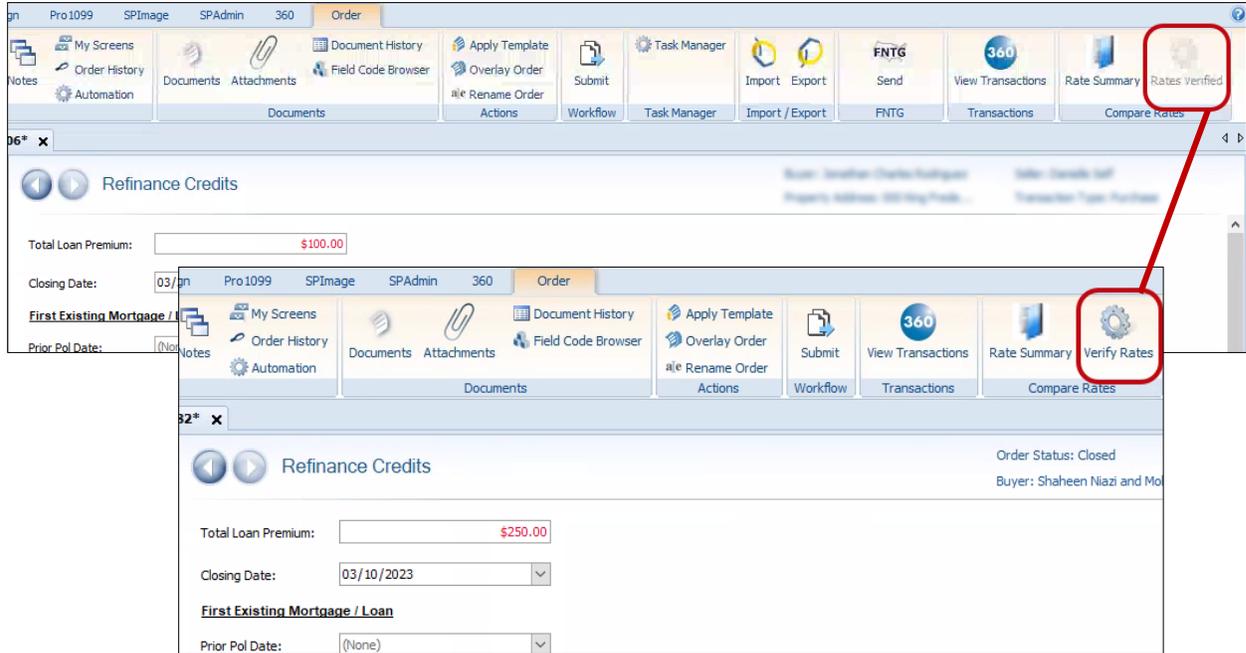
TEXAS

INTEGRATIONS

*Rate Validation Tool*

<b>New/Mod</b> Mod	<b>Requested By</b>	<b>FootPrints No.</b>	<b>DEVOPS No.</b>
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The **Rate Validation Tool** becomes active when changes occur on the Select **Refinance Credit** screen.



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UTAH

INTEGRATIONS

<i>Person Lookup Table Sync</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>Resolved: Issue with Lookup Table column existence checks looking at hard-coded “Order Contact – Person” table versus the current table.</p> <p>Determine if query should be on the “LookupCodeMain” column or the “FilterLookupCodeMain” column.</p> <p>Set the XML configuration value “FNF.Pulse.LookupTableSync.CompanyNotesColumn” to be “.CompanyAlertMessage_FNF#” versus “.PulseNotes#”.</p> <p><b>NOTE:</b> If upgrading to this build, registering the FNF.Pulse.LookupTableSync XML file is not required.</p> <p>Resolved: Bug re-introduced in v1.9.3.0: Error message displaying when importing a person to a Person Lookup Table that did not contain a Company Name column.</p> <p>Company Name column set to no longer be required.</p>			

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MY SCREENS

*Escrow Instructions Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Roberta Stone	<b>Incident No.</b>	<b>TFS No.</b>
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The **Escrow Instructions** screen has been added to the **Document Preparation** section.  
 This change is visible when the **My Screens > FT Utah All** is selected.

The screenshot displays the 'Escrow Instructions' screen. On the left, a navigation menu includes 'General', 'Closing', 'Commitment', 'Document Preparation' (selected), 'Notary & Acknowledgment', 'Deed', 'Escrow Instructions' (highlighted with a red circle), 'Security Instruments', 'Existing Liens', 'Rent Schedule', and 'Policy'. The main content area is titled 'Escrow Instructions' and shows a table with 0 records. Below the table are input fields for 'Type', 'Description', and 'Properties' (with checkboxes for 'Property Address' and 'Escrow Legal Description').

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WASHINGTON

DOCUMENTS

Escrow

<i>Letter (Notice Transaction Confirmation-Absentee Owner) aka Letter (Transaction Confirmation)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	WA EPU		782630
Updated to accommodate refinance transactions.			
<b>Affected item(s):</b> Letter (Notice Transaction Confirmation-Absentee Owner) Letter (Transaction Confirmation)			

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<i>Request for Full Reconveyance (Indem of Electronic Note-DOT)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New	CT/FNT Vancouver		782122
New document. Please render to view in full.			
<b>Affected item(s):</b> SSCORPD5861.doc - Request for Full Reconveyance (Indem of Electronic Note-DOT) (New)			

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<i>Request for Reconveyance without Full Satisfaction</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	CT/FT Vancouver		781453
Updated language "Said Full Reconveyance, when recorded, shall indicate on its face that the Note and Deed of Trust are not fully satisfied." to instead read: "Said Full Reconveyance, when recorded, shall indicate on its face that the Note is not fully satisfied."			
<b>Affected item(s):</b> Request for Reconveyance without Full Satisfaction			

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<i>Supplemental Report</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	Escrow Admin		781451
Updated for Default\P\WA\CPF Sea\REN or Default\P\WA\CPF Sea\SEA or Default\P\WA\CPF Sea\TAC to pull deleted exceptions/requirements.			
<b>Affected item(s):</b> Supplemental Report			

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<i>Verification Checklist</i>			
New/Mod	Requested By	Incident No.	TFS No.
New	TT Salem		782648
New document. Please render to view in full.			
<b>Affected item(s):</b> SSCORPD5863.doc - Verification Checklist (New)			

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INTEGRATIONS

*Rate Validation Tool*

<b>New/Mod</b> Mod	<b>Requested By</b>	<b>FootPrints No.</b>	<b>DEVOPS No.</b>
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The **Change Location (State)** and **Property Location State** questions have been removed from the **General** questions on the **Title Only** and **Escrow only** views, respectively.

Rate Summary View (1) Audit View

Title Only  Escrow only  Title & Escrow

Save & Open Utility Save & Close

**General**

Closing Location (State)? ---Select--- **REMOVED**

Rate Summary View (19) Audit View

Title Only  Escrow only  Title & Escrow

Save & Open Utility Save & Close

**General**

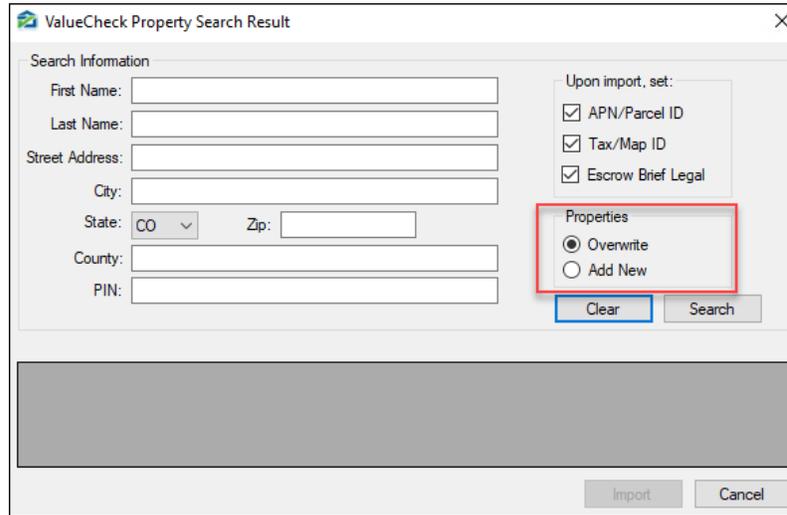
Property Location: State ---Select--- **REMOVED**

When determining the effective date of a rate validation request, the timestamp is removed when comparing the Select **Date/Time order received** field to the **Date/time title opened** and **Date/time escrow opened** fields. This determines if the request is a single request or two requests with different effective dates.

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<i>ValueCheck Property Search (Address Validation)</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			

The ability to import multiple properties has been added with the option to overwrite or add new (append) search results.



- › Overwrite – when selected,
  - » all existing properties in the order are removed and the selected properties are imported to the order.
  - » existing Buyer or Seller Contacts in the order are overwritten with the owners associated with the imported properties.
- › Add New – when selected, the new properties are added consecutively, after the last existing property. If an existing property address is a duplicate of a property being imported, that property will not be imported.
- › Order contacts are created when:
  - » A Buyer contact is created when a Buyer nor Seller exist in the order and Transaction Type is not a Purchase.
  - » A Buyer contact is created when one to multiple Buyers exist in the order and no Seller contact.
  - » A Seller contact is created when a Buyer nor Seller exist in the order and Transaction Type is a Purchase.
  - » A Seller contact is created when one to multiple Sellers and one to multiple Buyers exist in the order.
  - » A Seller contact is created when one to multiple Sellers exist in the order and no Buyer exist.
- › Order contacts are not created when:
  - » When at least one “Own1” field is populated with a value and all “Own2” fields are empty and the Select contact equals the “Own1” values.
  - » When at least one “Own2” field is populated with a value and all “Own1” fields are empty and the Select contact equals the “Own2” values.
  - » When at least one “Own1” field and at least one “Own2” field is populated with a value:

*ValueCheck Property Search (Address Validation)*

- If "Yes" is selected on the option to combine contacts: A new contact is not created when the Select contact Individual1 values equal the "Own1" values and the Select contact Individual2 values equal the "Own2" values.
  - If "No" is selected on the option to combine contacts: A new contact is not created when the Select contact values equal the "Own1" values or when the Select contact values equal the "Own2" values.
- › Confirmation message displays when a buyer or seller contact is being removed.
  - › The Order Transaction type will be used to determine if the buyer or seller need to be updated.
    - » Purchase transaction – only seller contact will be updated, added or deleted
    - » All other transaction – only buyer contact will be updated, added or deleted
  - › Search results no longer default the **Select** check box to be checked on the first property.

Resolved: The APN, Tax/Map ID and Escrow Brief Legal check boxes were not persisting when re-opening the Property Search Results dialog. Two configurable settings have been added to the ValueCheck XML: DefaultImportSettings and SaveImportSettings.

Resolved: Contact being deleted and re-added when using the Overwrite option.

The tool will now replace the data within the existing contact by overwriting the fields allowed by ValueCheck.

Resolved: Buyer contacts being deleted when importing owner into Purchase order.

Resolved: Buyer and Seller middle name not being imported.

Resolved: Error displayed when importing Range and Township data due to conflict in format (data received is a string value and the ProForm field is an integer).

Data is now parsed as:

- » If Range value in response is not empty
  - Accept string values of zero to many characters.
  - The first ten numeric values, up to 10, go to Order.Properties[].TownshipRange.Range.
  - The first non-numeric value goes to Order.Properties[].TownshipRange.RangeDirection.
  - All other characters are ignored.
  - Error message will be written when the numeric data exceeds 10 values.
  - Error message will be written when the non-numeric data exceeds 1 value.
- » If Township value in response is not empty
  - Accept string values of zero to many characters.
  - The first ten numeric values, up to 10, go to Order.Properties[].TownshipRange.Township.
  - The first non-numeric value goes to Order.Properties[].TownshipRange.TownshipDirection.
  - All other characters are ignored.
  - Error message will be written when the numeric data exceeds 10 values.
  - Error message will be written when the non-numeric data exceeds 1 value.

MY SCREENS

*Order Information Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Penny Hoskins	<b>Incident No.</b>	<b>TFS No.</b>
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The **Order Information** screen has been modified to include a new field: **FinCen Reporting > CTR Filed**. This change is visible when one of the following **My Screens** is selected:

- > **Washington Commercial CSS Screens**
- > **Washington Commercial Screens**
- > **Washington Escrow Screens**
- > **Washington Payoff Screens**
- > **Washington Screen List**
- > **Washington Title Screens**

The screenshot shows the 'Order Information' screen with the following fields and options:

- Project name: [Text Input]
- Borrower signing date: (None) [Dropdown]
- Seller signing date: (None) [Dropdown]
- Settlement date/time: (None) [Dropdown]  Estimated date/time
- This order has a rescission period
- Rescission date: (None) [Dropdown]  Include Saturday in rescission period
- Disbursement date: (None) [Dropdown]
- Proration date: (None) [Dropdown]  Charge buyer for proration date in all prorations
- Escrow office: [Dropdown] Escrow officer/Closer: [Dropdown]
- Title office: [Dropdown] Pre-closer/Escrow assistant: [Dropdown]
- Title officer/Examiner: [Dropdown]
- FinCen Reporting** (Section Header)
- CTR Filed: (None) [Dropdown] (This field is circled in red in the original image)
- Notes (0)

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REPORTS

Escrow/Title

<i>Transaction Form</i>			
<b>New/Mod</b>	<b>Requested By</b>	<b>Incident No.</b>	<b>TFS No.</b>
Change	CT Everett, FNT OC, AllFirst, CO Admin		781724
Updated to show the date of the posted receipt for CT Everett (WA). For CO removed **Cash deposit verified text.			
<b><u>Affected item(s):</u></b> Transaction Form			

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WISCONSIN

DOCUMENTS

Escrow

<a href="#"><i>Deed and Easement Report</i></a>			
<b>New/Mod</b> Change	<b>Requested By</b> CT WI	<b>Incident No.</b> INC230294786	<b>TFS No.</b> 781301
Various changes per request, please render to view in full.			
<b>Affected item(s):</b> Deed and Easement Report			

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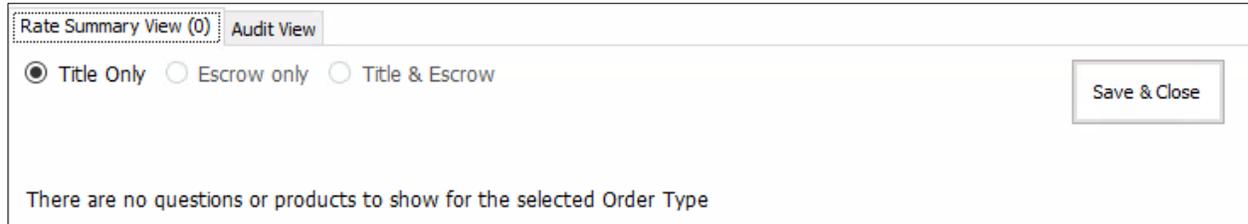
INTEGRATIONS

*Rate Validation Tool*

<b>New/Mod</b> Mod	<b>Requested By</b>	<b>FootPrints No.</b>	<b>DEVOPS No.</b>
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Support enabled for **Rate Summary View**. Engagement can be limited to when certain Endorsements require additional input for calculation or when new Title Products are introduced.

When no input is required, the **Rate Summary View** displays the message: *There are no questions or products to show for the selected Order Type.*



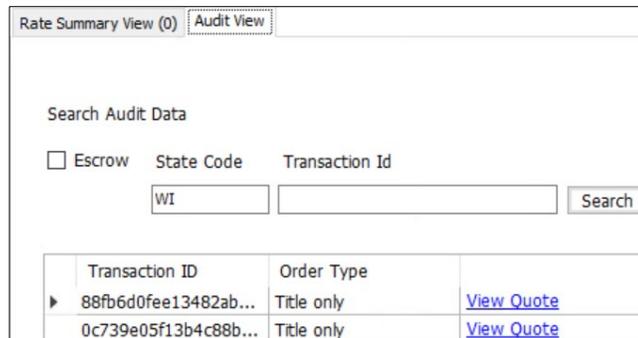
Rate Summary View (0) Audit View

Title Only
  Escrow only
  Title & Escrow

Save & Close

There are no questions or products to show for the selected Order Type

The **Audit View** allows for retrieval of the current and prior rate validations.



Rate Summary View (0) Audit View

Search Audit Data

Escrow    State Code    Transaction Id

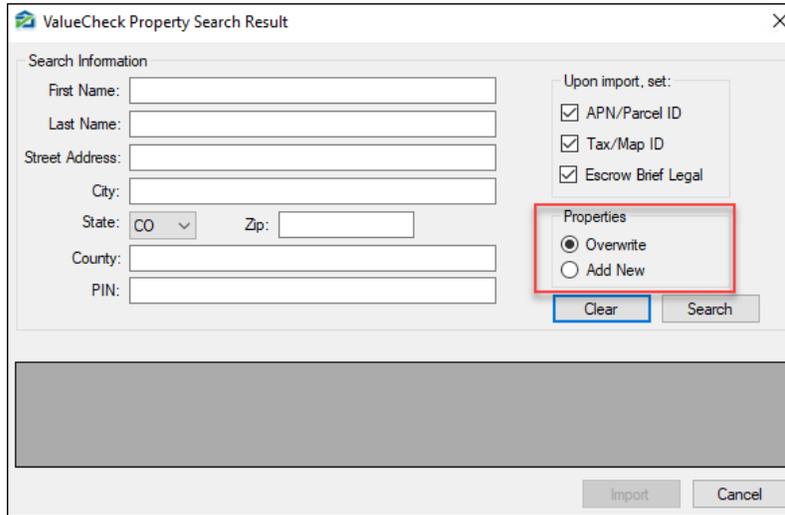
WI        Search

Transaction ID	Order Type	
▶ 88fb6d0fee13482ab...	Title only	<a href="#">View Quote</a>
0c739e05f13b4c88b...	Title only	<a href="#">View Quote</a>

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<i>ValueCheck Property Search (Address Validation)</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			

The ability to import multiple properties has been added with the option to overwrite or add new (append) search results.



- › Overwrite – when selected,
  - » all existing properties in the order are removed and the selected properties are imported to the order.
  - » existing Buyer or Seller Contacts in the order are overwritten with the owners associated with the imported properties.
- › Add New – when selected, the new properties are added consecutively, after the last existing property. If an existing property address is a duplicate of a property being imported, that property will not be imported.
- › Order contacts are created when:
  - » A Buyer contact is created when a Buyer nor Seller exist in the order and Transaction Type is not a Purchase.
  - » A Buyer contact is created when one to multiple Buyers exist in the order and no Seller contact.
  - » A Seller contact is created when a Buyer nor Seller exist in the order and Transaction Type is a Purchase.
  - » A Seller contact is created when one to multiple Sellers and one to multiple Buyers exist in the order.
  - » A Seller contact is created when one to multiple Sellers exist in the order and no Buyer exist.
- › Order contacts are not created when:
  - » When at least one “Own1” field is populated with a value and all “Own2” fields are empty and the Select contact equals the “Own1” values.
  - » When at least one “Own2” field is populated with a value and all “Own1” fields are empty and the Select contact equals the “Own2” values.
  - » When at least one “Own1” field and at least one “Own2” field is populated with a value:

*ValueCheck Property Search (Address Validation)*

- If "Yes" is selected on the option to combine contacts: A new contact is not created when the Select contact Individual1 values equal the "Own1" values and the Select contact Individual2 values equal the "Own2" values.
  - If "No" is selected on the option to combine contacts: A new contact is not created when the Select contact values equal the "Own1" values or when the Select contact values equal the "Own2" values.
- › Confirmation message displays when a buyer or seller contact is being removed.
  - › The Order Transaction type will be used to determine if the buyer or seller need to be updated.
    - » Purchase transaction – only seller contact will be updated, added or deleted
    - » All other transaction – only buyer contact will be updated, added or deleted
  - › Search results no longer default the **Select** check box to be checked on the first property.

Resolved: The APN, Tax/Map ID and Escrow Brief Legal check boxes were not persisting when re-opening the Property Search Results dialog. Two configurable settings have been added to the ValueCheck XML: DefaultImportSettings and SaveImportSettings.

Resolved: Contact being deleted and re-added when using the Overwrite option.

The tool will now replace the data within the existing contact by overwriting the fields allowed by ValueCheck.

Resolved: Buyer contacts being deleted when importing owner into Purchase order.

Resolved: Buyer and Seller middle name not being imported.

Resolved: Error displayed when importing Range and Township data due to conflict in format (data received is a string value and the ProForm field is an integer).

Data is now parsed as:

- » If Range value in response is not empty
  - Accept string values of zero to many characters.
  - The first ten numeric values, up to 10, go to Order.Properties[].TownshipRange.Range.
  - The first non-numeric value goes to Order.Properties[].TownshipRange.RangeDirection.
  - All other characters are ignored.
  - Error message will be written when the numeric data exceeds 10 values.
  - Error message will be written when the non-numeric data exceeds 1 value.
- » If Township value in response is not empty
  - Accept string values of zero to many characters.
  - The first ten numeric values, up to 10, go to Order.Properties[].TownshipRange.Township.
  - The first non-numeric value goes to Order.Properties[].TownshipRange.TownshipDirection.
  - All other characters are ignored.
  - Error message will be written when the numeric data exceeds 10 values.
  - Error message will be written when the non-numeric data exceeds 1 value.

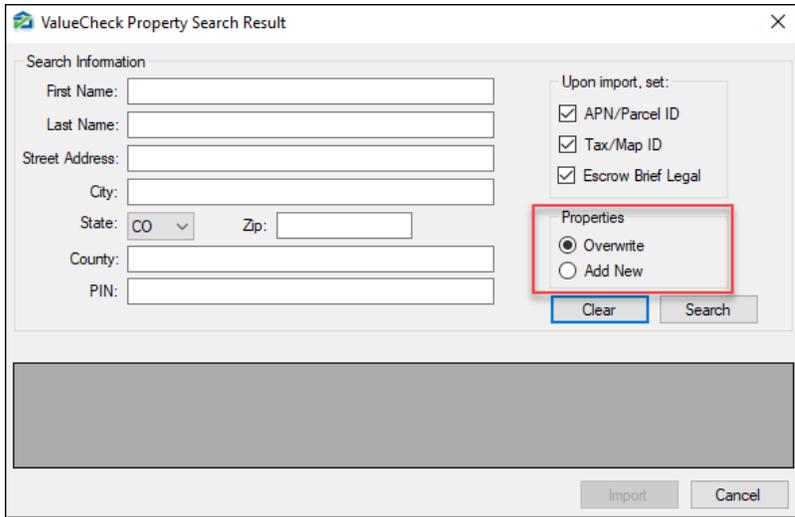
LAND CASTLE TITLE - AM

INTEGRATIONS

*ValueCheck Property Search (Address Validation)*

New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			

The ability to import multiple properties has been added with the option to overwrite or add new (append) search results.



- > Overwrite – when selected,
  - » all existing properties in the order are removed and the selected properties are imported to the order.
  - » existing Buyer or Seller Contacts in the order are overwritten with the owners associated with the imported properties.
  
- > Add New – when selected, the new properties are added consecutively, after the last existing property. If an existing property address is a duplicate of a property being imported, that property will not be imported.
  
- > Order contacts are created when:
  - » A Buyer contact is created when a Buyer nor Seller exist in the order and Transaction Type is not a Purchase.
  - » A Buyer contact is created when one to multiple Buyers exist in the order and no Seller contact.
  - » A Seller contact is created when a Buyer nor Seller exist in the order and Transaction Type is a Purchase.
  - » A Seller contact is created when one to multiple Sellers and one to multiple Buyers exist in the order.
  - » A Seller contact is created when one to multiple Sellers exist in the order and no Buyer exist.
  
- > Order contacts are not created when:
  - » When at least one “Own1” field is populated with a value and all “Own2” fields are empty and the Select contact equals the “Own1” values.
  - » When at least one “Own2” field is populated with a value and all “Own1” fields are empty and the Select contact equals the “Own2” values.

*ValueCheck Property Search (Address Validation)*

- » When at least one "Own1" field and at least one "Own2" field is populated with a value:
  - If "Yes" is selected on the option to combine contacts: A new contact is not created when the Select contact Individual1 values equal the "Own1" values and the Select contact Individual2 values equal the "Own2" values.
  - If "No" is selected on the option to combine contacts: A new contact is not created when the Select contact values equal the "Own1" values or when the Select contact values equal the "Own2" values.
- › Confirmation message displays when a buyer or seller contact is being removed.
- › The Order Transaction type will be used to determine if the buyer or seller need to be updated.
  - » Purchase transaction – only seller contact will be updated, added or deleted
  - » All other transaction – only buyer contact will be updated, added or deleted
- › Search results no longer default the **Select** check box to be checked on the first property.

Resolved: The APN, Tax/Map ID and Escrow Brief Legal check boxes were not persisting when re-opening the Property Search Results dialog. Two configurable settings have been added to the ValueCheck XML: DefaultImportSettings and SaveImportSettings.

Resolved: Contact being deleted and re-added when using the Overwrite option.

The tool will now replace the data within the existing contact by overwriting the fields allowed by ValueCheck.

Resolved: Buyer contacts being deleted when importing owner into Purchase order.

Resolved: Buyer and Seller middle name not being imported.

Resolved: Error displayed when importing Range and Township data due to conflict in format (data received is a string value and the ProForm field is an integer).

Data is now parsed as:

- » If Range value in response is not empty
  - Accept string values of zero to many characters.
  - The first ten numeric values, up to 10, go to Order.Properties[].TownshipRange.Range.
  - The first non-numeric value goes to Order.Properties[].TownshipRange.RangeDirection.
  - All other characters are ignored.
  - Error message will be written when the numeric data exceeds 10 values.
  - Error message will be written when the non-numeric data exceeds 1 value.
- » If Township value in response is not empty
  - Accept string values of zero to many characters.
  - The first ten numeric values, up to 10, go to Order.Properties[].TownshipRange.Township.
  - The first non-numeric value goes to Order.Properties[].TownshipRange.TownshipDirection.
  - All other characters are ignored.
  - Error message will be written when the numeric data exceeds 10 values.
  - Error message will be written when the non-numeric data exceeds 1 value.



LIBERTY TITLE

DOCUMENTS

Escrow

<i>Closing Confirmation (IL)</i>			
<b>New/Mod</b> Change	<b>Requested By</b> Liberty Title	<b>Incident No.</b>	<b>TFS No.</b> 782624
<p>Updated verbiage that read:</p> <p style="text-align: center;">FIGURES AND PACKAGE MUST BE SENT TO OUR CLOSER  Linette Johnson  Email: Linette.Johnson@libtitle.com  Phone: (312)489-9131</p> <p>TO:</p> <p style="text-align: center;">PLEASE SEND CLOSING PACKAGES AND CD REQUESTS TO  Linette Johnson  Email: Linette.Johnson@libtitle.com  AND  Amy Crivolio  Email: Amy.Crivolio@Libtitle.com  Please call (888)817-9888 to verify wire instructions.</p> <p><b>Affected item(s):</b>  Closing Confirmation (IL)</p>			

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REPORTS

Profit Center Recap - SPUG #258			
<b>New/Mod Change</b>	<b>Requested By</b> Liberty Title Admin.	<b>Incident No.</b>	<b>TFS No.</b> 781884
Added "Branch State" as a group by option for Liberty Title.			
<b>Affected item(s):</b> Profit Center Recap			

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NCS

DOCUMENTS

Escrow

<a href="#"><i>Agreement (Construction Loan)</i></a>			
<b>New/Mod</b> Change	<b>Requested By</b> NCS	<b>Incident No.</b>	<b>TFS No.</b> 782978
Updated to remove the company name and replaced with "Escrow Trustee" for NCS operations.			
<b>Affected item(s):</b> Agreement (Construction Loan)			

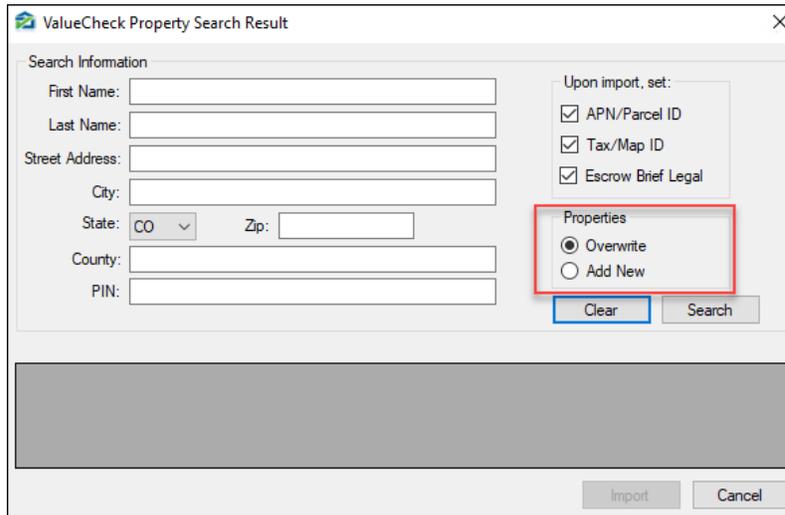
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INTEGRATIONS

*ValueCheck Property Search (Address Validation)*

New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			

The ability to import multiple properties has been added with the option to overwrite or add new (append) search results.



- › Overwrite – when selected,
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- › Add New – when selected, the new properties are added consecutively, after the last existing property. If an existing property address is a duplicate of a property being imported, that property will not be imported.
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  - » A Buyer contact is created when one to multiple Buyers exist in the order and no Seller contact.
  - » A Seller contact is created when a Buyer nor Seller exist in the order and Transaction Type is a Purchase.
  - » A Seller contact is created when one to multiple Sellers and one to multiple Buyers exist in the order.
  - » A Seller contact is created when one to multiple Sellers exist in the order and no Buyer exist.
- › Order contacts are not created when:
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  - » When at least one “Own2” field is populated with a value and all “Own1” fields are empty and the Select contact equals the “Own2” values.
  - » When at least one “Own1” field and at least one “Own2” field is populated with a value:

*ValueCheck Property Search (Address Validation)*

- If "Yes" is selected on the option to combine contacts: A new contact is not created when the Select contact Individual1 values equal the "Own1" values and the Select contact Individual2 values equal the "Own2" values.
  - If "No" is selected on the option to combine contacts: A new contact is not created when the Select contact values equal the "Own1" values or when the Select contact values equal the "Own2" values.
- › Confirmation message displays when a buyer or seller contact is being removed.
  - › The Order Transaction type will be used to determine if the buyer or seller need to be updated.
    - » Purchase transaction – only seller contact will be updated, added or deleted
    - » All other transaction – only buyer contact will be updated, added or deleted
  - › Search results no longer default the **Select** check box to be checked on the first property.

Resolved: The APN, Tax/Map ID and Escrow Brief Legal check boxes were not persisting when re-opening the Property Search Results dialog. Two configurable settings have been added to the ValueCheck XML: DefaultImportSettings and SaveImportSettings.

Resolved: Contact being deleted and re-added when using the Overwrite option.

The tool will now replace the data within the existing contact by overwriting the fields allowed by ValueCheck.

Resolved: Buyer contacts being deleted when importing owner into Purchase order.

Resolved: Buyer and Seller middle name not being imported.

Resolved: Error displayed when importing Range and Township data due to conflict in format (data received is a string value and the ProForm field is an integer).

Data is now parsed as:

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  - Accept string values of zero to many characters.
  - The first ten numeric values, up to 10, go to Order.Properties[].TownshipRange.Range.
  - The first non-numeric value goes to Order.Properties[].TownshipRange.RangeDirection.
  - All other characters are ignored.
  - Error message will be written when the numeric data exceeds 10 values.
  - Error message will be written when the non-numeric data exceeds 1 value.
- » If Township value in response is not empty
  - Accept string values of zero to many characters.
  - The first ten numeric values, up to 10, go to Order.Properties[].TownshipRange.Township.
  - The first non-numeric value goes to Order.Properties[].TownshipRange.TownshipDirection.
  - All other characters are ignored.
  - Error message will be written when the numeric data exceeds 10 values.
  - Error message will be written when the non-numeric data exceeds 1 value.

MY SCREENS

*Order Information Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Penny Hoskins	<b>Incident No.</b>	<b>TFS No.</b>
-----------------------	--------------------------------------	---------------------	----------------

The **Order Information** screen has been modified to include a new field: **FinCen Reporting > CTR Filed**.

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

- > **Washington Commercial CSS Screens**
- > **Washington Escrow Screens**
- > **Washington Title Screens**

The screenshot shows the 'Order Information' screen with various fields. A red circle highlights the 'FinCen Reporting' section, which includes a dropdown menu for 'CTR Filed' currently set to '(None)'. Other fields include Project name, Borrower signing date, Seller signing date, Settlement date/time, Rescission date, Disbursement date, Proration date, Escrow office, Escrow officer/Closer, Pre-closer/Escrow assistant, and Title officer/Examiner.

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NOVARE

INTEGRATIONS

<i>Person Lookup Table Sync</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>Resolved: Issue with Lookup Table column existence checks looking at hard-coded “Order Contact – Person” table versus the current table.</p> <p>Determine if query should be on the “LookupCodeMain” column or the “FilterLookupCodeMain” column.</p> <p>Set the XML configuration value “FNF.Pulse.LookupTableSync.CompanyNotesColumn” to be “.CompanyAlertMessage_FNF#” versus “.PulseNotes#”.</p> <p><b>NOTE:</b> If upgrading to this build, registering the FNF.Pulse.LookupTableSync XML file is not required.</p> <p>Resolved: Bug re-introduced in v1.9.3.0: Error message displaying when importing a person to a Person Lookup Table that did not contain a Company Name column.</p> <p>Company Name column set to no longer be required.</p>			

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<i>Rate Validation Tool</i>			
New/Mod	Requested By	FootPrints No.	DEVOPS No.
Mod			
<p>Support added for Novare brand and associated products allowing for pricing of the Novare brand products for state of Arizona. Configuration is required.</p>			

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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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