

# SOFTPRO SELECT

April 2024

RELEASE NOTES



Testing Release Date: April 5, 2024  
Production Release Date: April 15, 2024



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ALL STATES/SITES

DOCUMENTS

Escrow

<a href="#"><i>1099 Batch Header Form</i></a>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	1099 Dept		810557
Revised to match updated form.			
<b>Affected item(s):</b> SSCORPD5419.doc - 1099 Batch Header Form			

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<a href="#"><i>Affidavit (Sign Language Interpreter)</i></a>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	Tech Memo 111-2009		811714
New document. Please render to view.			
<b>Affected item(s):</b> SSCORPD5939.doc - Affidavit (Sign Language Interpreter)			

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<a href="#"><i>Affiliated Business Arrangement Disclosure Statement</i></a>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNF Compliance		808814
Replaced "To: _____" with "To whom it may concern".			
<b>Affected item(s):</b> SSCORPD5927.doc - Affiliated Business Arrangement Disclosure Statement			

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<a href="#"><i>Assignee Instructions</i></a>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	CT PA NCS		808859
New document. Please render to view in full.			
<b>Affected item(s):</b> SSCORPD5938.doc - Assignee Instructions			

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<a href="#"><i>Wire Fraud Checklist</i></a>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FT MI		810142
Added a prompt to enter the date and time the wire instructions were verified.			
<b>Affected item(s):</b> SSCORPD5635.doc - Wire Fraud Checklist SSCORPD5650.doc - Wire Fraud Checklist (Prompt)			

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INTEGRATIONS

*Rate Validation Tool*

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

This release includes:

- > Rate Verification Notes are now combined when Title and Escrow premiums are verified at the same time with the same **Effective Date**. **ESCROW DETAILS** are included with the Title Verification.

**NOTE:** If the **Effective Date** of Title and Escrow are not the same, individual Notes will continue to be saved.

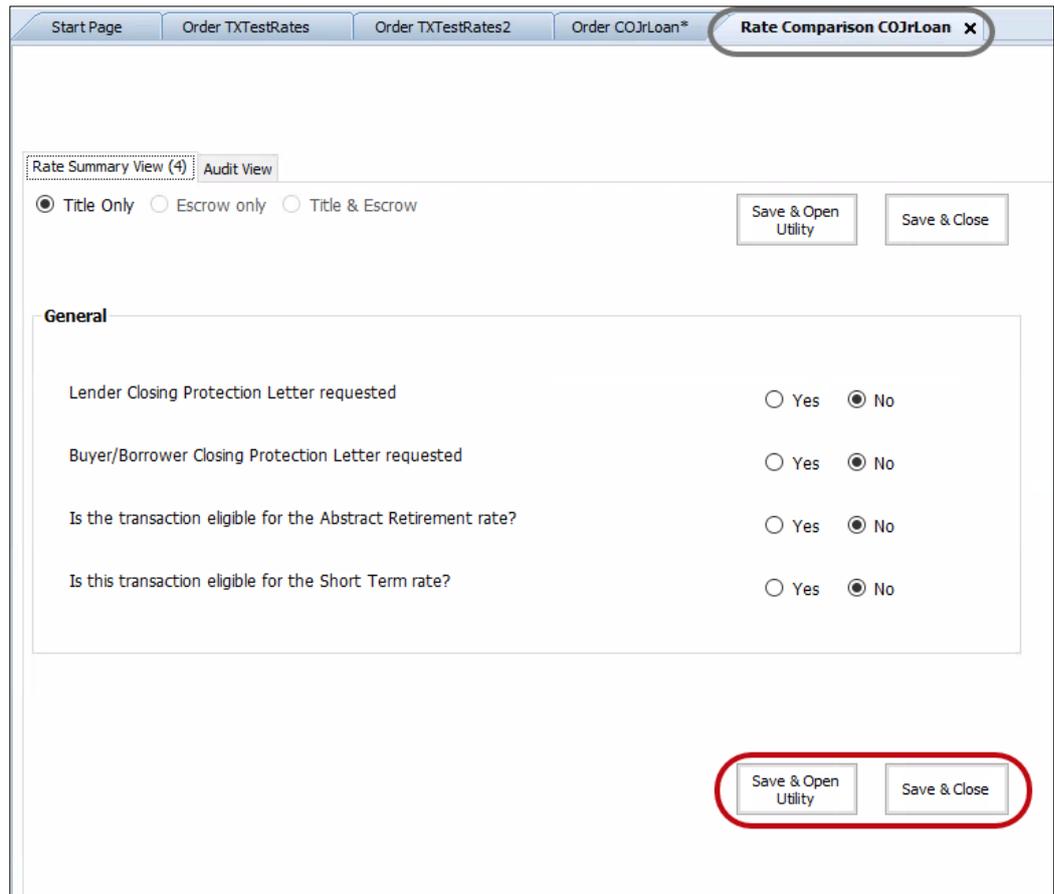
The screenshot shows the 'Edit Note' interface for order XSCA2400007. It displays two notes side-by-side. The top note has an effective date of 04/01/2024 and includes 'ESCROW DETAILS'. The bottom note has an effective date of 04/02/2024 and also includes 'ESCROW DETAILS'. Red callouts highlight the effective dates and the 'ESCROW DETAILS' section in both notes. A label 'Same Effective Date' points to the 04/01/2024 date, and a label 'Different Effective Date' points to the 04/02/2024 date.

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*Rate Validation Tool cont'd*

<b>New/Mod</b>	<b>Requested By</b>	<b>Incident No.</b>	<b>DEVOPS No.</b>
Mod			

- > Clicking the Rate Summary View button when there are Transaction and Product level questions displays the Save & Open Utility and Save & Close buttons at the bottom of Rate Comparison tab.



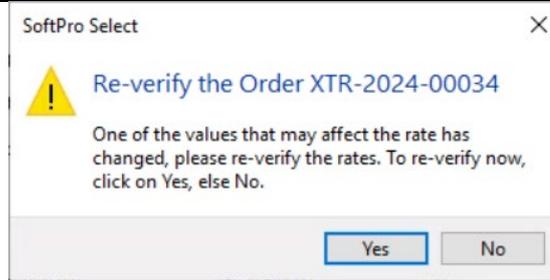
- > Reverification Alert message changes made to:
  - » Prevent the popup from impacting SoftPro360 transactions.
  - » Prevent the popup from appearing after engaging the Register.
  - » Reduce the amount of user engagement required to re-verify rates (from 3 clicks to 1 click).

When an order requires reverification,

  - the **Re-verify** alert message displays immediately after opening the order. Once the popup is displayed, it will not appear again in the same order session.

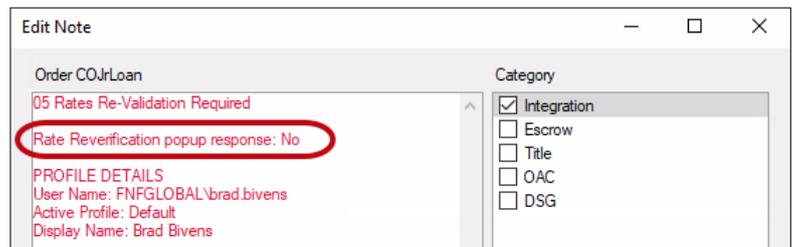
*Rate Validation Tool cont'd*

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



- If **No** or Cancel (red x) is clicked, a note is added to the **Integration Notes**.

**NOTE:** If the order remains in re-verify state upon exiting the order, the alert message repeats when the order is opened again.



- If **Yes** is clicked, the utility automatically compares the rates and opens the **Comparison View** screen; user interaction is required if rates do not match.
- The **Re-Verify Rates** button can be clicked anytime an order is in the re-verification state. Once clicked, the **Comparison View** screen opens reducing the user input from 3 clicks to 1 click.
- When an Escrow only verification or re-verification:
  - The **'Rates have been deposited to RS screen'** popup has been removed.
  - The utility opens the **Property View** tab displaying the **"Rates have been deposited..."** note in green text.

No changes to the Note functionality have occurred for Escrow only.





## RELEASE NOTES

APRIL 2024

### REPORTS

#### [Batch Open Order Sheet \(with notes\)](#)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	LT SoCal Admin		811071
Added checkbox parameter "Exclude Notes," when checked the notes will be omitted.			
<b>Affected item(s):</b> SSCORP5098.rpt - Batch Open Order Sheet (with notes)			

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#### [Escrow Trial Balance \(with IBA Balances\)](#)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	FL Developers Admin		805259
Updated to show 6 point font size on totals if amount is over 99,999,99.99.			
<b>Affected item(s):</b> SSCORP5025 - Escrow Trial Balance (with IBA Balances)			

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#### [IBA Detail by Bank and Escrow](#)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	FL Developers Admin		805232
Updated to show 6 point font size on totals if amount is over 99,999,99.99.			
<b>Affected item(s):</b> SSCORP5022 - IBA Detail by Bank and Escrow			

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#### [Order Tasks by Order Date](#)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	MidWest IT		808528
Added "Due Date" as an option for Group 2.			
<b>Affected item(s):</b> SSCORP5475.rpt - Order Tasks by Order Date			

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#### [Order Tasks by Task Dates](#)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	MidWest IT		808526
Added "Due Date" as an option for Group 2.			
<b>Affected item(s):</b> SSCORP5474.rpt - Order Tasks by Task Dates			

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<i>Orders by {Selection}</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	LT SoCal Admin		811022
Updated to include 'Order Type Description' in the dropdown for Group by 1 and 2, so EO/TO and other Order types show, besides the main Escrow Only, Title Only, Title and Escrow.			
<b>Affected item(s):</b> SSCORP5082.rpt - Orders by {Selection}			

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<i>Orders by {Selection}</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	SoCal LTC Admin		809634
Updated to add a new Excel Export "Excel-FinCen" for an alternative view or a companion to the existing FinCen report.			
<b>Affected item(s):</b> SSCORP5082.rpt - Orders by {Selection}			

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<i>Orders by Transaction Type</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	LT SoCal Admin		810970
Added 'Group by' option for 'Order Type Description' and checkbox parameter to include Rev columns when run for Closed orders.			
NOTE: When this combination is selected, the current last five columns will be replaced with Title, Escrow, Other and Total Premium columns			
<b>Affected item(s):</b> SSCORP5481.rpt - Orders by Transaction Type			

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<i>Weekly Summary of Business Worksheet</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	LT SoCal Admin		810966
Added a checkbox parameter to exclude EO/TO files.			
<b>Affected item(s):</b> SSCORP5247.rpt - Weekly Summary of Business Worksheet			

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ARIZONA

DOCUMENTS

Escrow

<i>Instructions (Recording and Policy) - Letter</i>			
<b>New/Mod</b> New Request	<b>Requested By</b> FNT Phoenix - Northgate Commercial	<b>Incident No.</b>	<b>TFS No.</b> 811491
Duplicate of an existing form but made letter sized.			
<b><u>Affected item(s):</u></b> AZD1455.doc - Instructions (Recording and Policy) - Letter			

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CALIFORNIA

DOCUMENTS

Escrow

<i>Closing Letters (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNT Las Vegas		809313
Added functionality for NV users to prompt for forwarding address.			
<b>Affected item(s):</b> SCA0002797.doc - Closing Letter (Buyer-Borrower) SCA0002797.doc - Closing Letter (Seller)			

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<i>Remove Reference to Stillwater Insurance Group</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNT San Diego		809273
Removed reference to Stillwater Insurance Group.			
<b>Affected item(s):</b> SCA0000121.doc - Fire Insurance Info Form SCA0000139.doc - Important Buyer Information SCA0000142.doc - Info Sheet SCA0002218.doc - Info Sheet (Letter)			

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<i>Vesting Information</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	LT SoCal		811498
Spacing reduced to keep the form to one page for most scenarios.			
<b>Affected item(s):</b> SCA0000303.doc - Vesting Information			

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INTEGRATIONS

*Disclosure Source*

New/Mod Mod	Requested By	Incident No.	TFS No.
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This release includes the following:

- New Report Type selections added a Report Type drop-down for residential and commercial orders.

The **Report Type** includes,

- › Residential Orders – **24-Residential Premium** (default option) - defaults to **Yes** for the Environmental Report request
- › Residential Orders – **27-Residential Standard** - does not provide the option to request the Environmental Report

Disclosure Source Form

Send Order To Disclosure Source

Owner Name	Current Owner	Report Type	24-Residential Premium
Escrow Number	MattsDisclosure	Close of Escrow	24-Residential Premium 27-Residential Standard

- › Commercial Orders – **5-Commercial** only

Disclosure Source Form

Send Order To Disclosure Source

Owner Name	Current Owner	Report Type	5-Commercial
Escrow Number	MattsDisclosure	Close of Escrow	5-Commercial

RESOLVED: Password saved as plain text instead of encrypted; tool now uses the GCM encryption method.

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*Rate Validation Tool*

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

This release includes:

- The following Loan Policy question no longer appears in the **Rate Summary View** under **Products - Loan Policy**:

The screenshot shows the 'Rate Summary View (3)' interface with an 'Audit View' tab. At the top, there are radio buttons for 'Title Only' (selected), 'Escrow only', and 'Title & Escrow', along with 'Save & Open Utility' and 'Save & Close' buttons. Below this is a 'General' section with two questions: 'If the property being insured consists of multiple parcels, how many ADDITIONAL parcels (after the first) are being insured?' with an input field, and 'Does the transaction involve a concurrent change of ownership?' with 'Yes' and 'No' radio buttons. The 'No' option is selected. Below the 'General' section is a 'Products' section with a 'Loan1 Policy' sub-section. A question 'Which policy will be issued upon consummation of the future transaction?' is circled in red, with a dropdown menu showing 'Coverage Owner's Policy'. A large black arrow labeled 'REMOVED' points to this circled question.

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REPORTS

<i>Billing Instruction (TT)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	SoCal TT Admin		809629
Updated to include either the Mortgage Broker or Lender for Refis.			
<b>Affected item(s):</b> SSCROPD5862.spdoc - Billing Instruction (TT)			

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<i>Data Download</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNF SD - IE Admin		807394
Updated to replace "Paid Date" (Column D) logic, to "Submitted to Title" and show the date for the completed task "T01. Title Opened/ Sent to NextACE" instead.			
<b>Affected item(s):</b> SSCORP5577.rpt - Data Download			

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<i>EPU Task Summary/Productivity by County Manager</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	EPU Div Mngment.		808554
Updated the task below: The previous task name was: 02 - Absentee Letter Sent The new task name is: 02 - Absentee Letter Review			
<b>Affected item(s):</b> SSCORP5149.rpt - EPU Task Summary/Productivity by County Manager			

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<i>EPU Task Summary/Productivity by Employee</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	EPU Div Mngment.		808556
Updated the task below: The previous task name was: 02 - Absentee Letter Sent The new task name is: 02 - Absentee Letter Review			
<b>Affected item(s):</b> SSCORP5150.rpt - EPU Task Summary/Productivity by Employee			

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<i>EPU Trends</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	EPU Div Mngment.		808558
Updated the task below: The previous task name was: 02 - Absentee Letter Sent The new task name is: 02 - Absentee Letter Review			
<b>Affected item(s):</b> SSCORP5152.rpt - EPU Trends			

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## RELEASE NOTES

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### Loan Depot - Daily Pipeline

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Lenders Express Admin		809520

Updated to add columns and logic.

**Affected item(s):**

SSCORP5591.rpt - Loan Depot - Daily Pipeline

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### Report Descriptions

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Reports Team		809733

The following report descriptions were missing and have been updated for CA:

- Closings By Post Date
- Closings by Post Date - FNT LA
- Commissions by Escrow Officer (FNT LA
- Opened/Closed Orders by {Selection} - FNT LA
- Openings by Marketing Rep w/Splits
- Loan Depot - Clear to Close
- Loan Depot - Daily Pipeline
- Closed Orders (Detail by Branch and MR)
- Closed Orders (Detail by Branch and EO)
- Data Download
- Rates Verification Exceptions
- Trial Balance – Closed
- Accidental Closed/Completed Orders
- Absentee Owner
- Binder Report

**Affected item(s):**

SSCORP5117.rpt - Report Descriptions

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COLORADO

DOCUMENTS

Escrow

*Affidavit (Notary Correction) nka Affidavit (Notary)*

New/Mod	Requested By	Incident No.	TFS No.
Change Request	All CO Operations		809306
Various revisions applied to comply with lender's requests. Please render to view in full.			
<b>Affected item(s):</b> COD1073.doc - Affidavit (Notary)			

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*Statement of Information*

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Heritage Title		808818
Added the order number to the document.			
<b>Affected item(s):</b> COD1004.doc - Statement of Information			

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INTEGRATIONS

*Rate Validation Tool*

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

This release includes:

- Support added across all Underwriters for,
  - Policy Code: COXX-007-Residential Limited Coverage Jr Loan
  - Policy Version: ALTA Residential Limited Coverage Junior Loan Policy 2012
  - Endorsement Code: ALTA JR1  
ALTA JR2

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*ValueCheck LinkIt*

New/Mod	Requested By	Incident No.	TFS No.
Mod			

This release includes the following:

RESOLVED: Previously applied hyperlinks break after running LinkIt the first time displaying the error, *Text Filter error: There is a logical error in the file. (1-1D02).*

RTF text handling updated to move away from RegEx statements in favor of TXText.Control.

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<i>ValueCheck Property Search</i>			
New/Mod	Requested By	Incident No.	TFS No.
Mod			
<p>This release includes the following:</p> <p>RESOLVED: The <b>APN/Parcel ID</b>, <b>Tax/Map ID</b> and <b>Escrow Brief Legal</b> check boxes not retaining current state when the dialog is closed and re-opened. The below configurable settings have been added to the FNF.Select.ValueCheckProeprtySearch.xml:</p> <p><u>First Setting</u></p> <ul style="list-style-type: none"> <li>• Label: DefaultImportSettings <ul style="list-style-type: none"> <li>○ Values: Checked/Unchecked</li> <li>○ Default value: Unchecked</li> <li>○ When setting is "Unchecked", the checkboxes on the dialog will default as NOT checked</li> <li>○ When setting is "Checked", the checkboxes on the dialog will default as checked</li> <li>○ When setting is invalid or not specified, the checkboxes on the dialog will default as NOT checked</li> <li>○ Value is case insensitive</li> </ul> </li> </ul> <p><u>Second Setting</u></p> <ul style="list-style-type: none"> <li>• Label: SaveImportSettings <ul style="list-style-type: none"> <li>○ Values: True/False</li> <li>○ Default value: True</li> <li>○ When setting is "True", the last state of the checkboxes will be persisted/remembered</li> <li>○ When setting is "False", the last state of the checkboxes will NOT be persisted/remembered</li> <li>○ When setting is invalid or not specified, the state of the checkboxes will be persisted/remembered</li> <li>○ Value is case insensitive</li> </ul> </li> </ul> <p>RESOLVED: First property check box should not default to checked in Search results.</p> <p>RESOLVED: Buyer and Seller Middle Name is omitted when the names are imported from the search.</p> <p>RESOLVED: '<i>ValueCheck Property Search Operation failed.</i>' Error displays when importing Rand and Township data due to Select not accepting string values sent from ValueCheck.</p>			

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REPORTS

<i>Closing Disclosure Form (CDF) - Seller CDF</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> Co Admin	<b>Incident No.</b>	<b>TFS No.</b> 805992
Report logic was modified so the SB and LB contacts only show when they are marked as commitment recipients.			
<b>Affected item(s):</b> SSCORPD5469.spdoc - Seller Closing Disclosure Form (CDF)			

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FLORIDA

DOCUMENTS

Escrow

*Real Property Transfer Information Sheet (Collier County)*

New/Mod	Requested By	Incident No.	TFS No.
New Request	FNT CPU		811464

New document. Please render to view in full.

**Affected item(s):**

FLD1404.doc - Real Property Transfer Information Sheet (Collier County)

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INTEGRATIONS

*Rate Validation Tool*

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

This release includes:

- Feature 4 support. This enables the **Rate Summary** button on the **Order** ribbon which allows for an **Audit View** of verified files.

There is no change to the Verify Rates functionality.



Transaction ID	Order Type	
▶ 457681203a7649d78b58d18ca9...	Title only	<a href="#">View Quote</a>
c297cb3d8cad440db3665543f17...	Title only	<a href="#">View Quote</a>
7b73ece98f234dbeb0831598cd3...	Title only	<a href="#">View Quote</a>
24489985a78445059b09614879...	Title only	<a href="#">View Quote</a>
7c6698aee04148fd947cdc360d4...	Title only	<a href="#">View Quote</a>
e8379f3b14204f23a8466465678...	Title only	<a href="#">View Quote</a>
676fc8f2f292420daf5e050aa159...	Title only	<a href="#">View Quote</a>
86a4892a74e94f40aaa960f7598...	Title only	<a href="#">View Quote</a>
a1a3c54562334e9e8f7690f5ca8...	Title only	<a href="#">View Quote</a>
9755ac20fbbf4965a354894c774f...	Title only	<a href="#">View Quote</a>
dce52afaa5e44fa1a7066605b351...	Title only	<a href="#">View Quote</a>

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HAWAII

DOCUMENTS

Escrow

<i>CLTA Condition of Title Guarantee (HI)</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> FT HI	<b>Incident No.</b>	<b>TFS No.</b> 809136
Added error if there is no Additional Charge item with Bill Code of CTR.			
<b>Affected item(s):</b> HID1367.doc - CLTA Condition of Title Guarantee (HI)			

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<i>Form Information Request - 8300</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> Title Guaranty	<b>Incident No.</b>	<b>TFS No.</b> 808833
Added ability to render the document for "Other" contacts.			
<b>Affected item(s):</b> HID1429.doc - Form Information Request - 8300			

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INTEGRATIONS

*Rate Validation Tool*

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

This release includes:

- The following Loan Policy question no longer appears in the **Rate Summary View** under **Products - Loan Policy**:

Rate Summary View (3) Audit View

Title Only
  Escrow only
  Title & Escrow
 Save & Open Utility
Save & Close

**General**

If the property being insured consists of multiple parcels, how many ADDITIONAL parcels (after the first) are being insured?

Does the transaction involve a concurrent change of ownership?  Yes  No

**Products**

**Loan1 Policy**

Which policy will be issued upon consummation of the future transaction? Overage Owner's Policy REMOVED

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IDAHO

DOCUMENTS

Escrow

<i>Recording and Policy Instructions</i>			
<b>New/Mod</b>	<b>Requested By</b>	<b>Incident No.</b>	<b>TFS No.</b>
Change Request	Escrow Admin		807609
Various changes applied. Please render to view all changes.			
<b>Affected item(s):</b> IDD1104.doc - Recording and Policy Instructions			

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ILLINOIS

DOCUMENTS

Escrow

<i>Construction Forms (5)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT IL and FT Metro		808867
New paragraph added to provide for the collection of electronic documentation.			
<p><b>Affected item(s):</b>            ILD0156.doc - Agreement (Owner - No Title)            ILD0158.doc - Agreement (Construction Loan)            ILD0159.doc - Agreement (Tenant Improvement)            ILD0163.doc - Agreement (Title Insurance - Lender)            ILD0567.doc - Construction Loan Escrow and Disbursement Agreement</p>			

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<i>Remote Closing Cover Page</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNT IL	INC240103355	810560
Updated the name and contact phone number.			
<p><b>Affected item(s):</b>            ILD0214.doc - Remote Closing Cover Page</p>			

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Title

*SE 553 - Deletion of Arbitration - ADDED*  
*SE 510 - Deletion of Arbitration - ALTA Loan or ALTA Exp Cvg Res Loan (2021) - REMOVED*  
*SE 511 - Deletion of Arbitration - ALTA Owners Policy (2021) - REMOVED*

<b>New/Mod</b> Change Request	<b>Requested By</b> IL State Counsel	<b>Incident No.</b>	<b>TFS No.</b> 810385
----------------------------------	---	---------------------	--------------------------

Per direction of state counsel, the SE 553 - Deletion of Arbitration endorsement has been added (and the SE 510 and SE 511 endorsements will be removed).

The SE 553 endorsement can be used for either 2006 or 2021 policies (both Loan and Owner's) and will pull in the applicable paragraph number depending on the policy for which it is being issued.

For example, when issued for the below policies, it will show the paragraph number as indicated below:

2006 ALTA Loan:

This endorsement hereby amends the policy by deleting Paragraph 13 of the Conditions relating to Arbitration.

2021 ALTA Loan:

This endorsement hereby amends the policy by deleting Paragraph 18 of the Conditions relating to Arbitration.

2006 ALTA Owner's:

This endorsement hereby amends the policy by deleting Paragraph 14 of the Conditions relating to Arbitration.

2021 ALTA Owner's:

This endorsement hereby amends the policy by deleting Paragraph 19 of the Conditions relating to Arbitration.

Note: The SE 91 and SE 93 will remain available for use with the 2006 policies, if preferred, but the SE 553 can be used instead.

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INDIANA

DOCUMENTS

Escrow

<a href="#"><i>Letter (Authorization)</i></a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> FNT IN	<b>Incident No.</b>	<b>TFS No.</b> 808927
Updated "Please Overnight My Proceeds To The Following Address" to instead read "Please Send My Copies To The Following Address" with line for "Or Email To:".			
<b>Affected item(s):</b> IND1060.doc - Letter (Authorization)			

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MARYLAND

DOCUMENTS

Escrow

<a href="#"><i>Seller Information Sheet (BP)</i></a>			
<b>New/Mod</b> New Request	<b>Requested By</b> Property Title & Escrow	<b>Incident No.</b>	<b>TFS No.</b> 809309
New document. Please render to view in full.			
<b><u>Affected item(s):</u></b> MDD1148.doc - Seller Information Sheet (BP)			

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MISSOURI

DOCUMENTS

Escrow

<i>COV - St. Louis City</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> St Louis Title	<b>Incident No.</b>	<b>TFS No.</b> 810397
Form has been updated to match the city's requirements.			
<b>Affected item(s):</b> MOD1147.doc - COV - St. Louis City			

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<i>Wire Information</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> Security Title	<b>Incident No.</b> INC240092954	<b>TFS No.</b> 809928
Removed the bank address prompt for Security Title.			
<b>Affected item(s):</b> SSCORPD1807.doc - Wire Information			

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REPORTS

<i>Order Tasks by Order Date</i>			
New/Mod Change Request	Requested By SLT	Incident No.	TFS No. 809620
<p>For profile = Default\P\MO\FT STL\St.Louis Title Commercial</p> <ul style="list-style-type: none"> <li>- When "Commercial" is selected for the parameter, "Commercial/Residential filter:", the records returned are those where the file is Commercial (Commercial IS checked) OR the 'Commercial Search' checkbox IS checked</li> <li>- When "Residential" or 'Commercial and Residential' is selected for the parameter, "Commercial/Residential filter:", the report will ignore the 'Commercial Search' checkbox</li> </ul> <p>For profile = Default\P\MO\FT STL\St.Louis Title Residential</p> <ul style="list-style-type: none"> <li>- When "Residential" is selected for the parameter, "Commercial/Residential filter:", the records returned are those where the file is Residential (Commercial is NOT checked) AND the 'Commercial Search' checkbox is NOT checked</li> <li>- When "Commercial" or 'Commercial and Residential' is selected for the parameter, "Commercial/Residential filter:", the report will ignore the 'Commercial Search' checkbox</li> </ul> <p><b>Affected item(s):</b> SSCORP5475.rpt - Order Tasks by Order Date</p>			

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<i>Order Tasks by Task Dates</i>			
New/Mod Change Request	Requested By SLT	Incident No.	TFS No. 809621
<p>For profile = Default\P\MO\FT STL\St.Louis Title Commercial</p> <ul style="list-style-type: none"> <li>- When "Commercial" is selected for the parameter, "Commercial/Residential filter:", the records returned are those where the file is Commercial (Commercial IS checked) OR the 'Commercial Search' checkbox IS checked</li> <li>- When "Residential" or 'Commercial and Residential' is selected for the parameter, "Commercial/Residential filter:", the report will ignore the 'Commercial Search' checkbox</li> </ul> <p>For profile = Default\P\MO\FT STL\St.Louis Title Residential</p> <ul style="list-style-type: none"> <li>- When "Residential" is selected for the parameter, "Commercial/Residential filter:", the records returned are those where the file is Residential (Commercial is NOT checked) AND the 'Commercial Search' checkbox is NOT checked</li> <li>- When "Commercial" or 'Commercial and Residential' is selected for the parameter, "Commercial/Residential filter:", the report will ignore the 'Commercial Search' checkbox</li> </ul> <p><b>Affected item(s):</b> SSCORP5474.rpt - Order Tasks by Task Dates</p>			

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MONTANA

DOCUMENTS

Escrow

<i>Deed (Reconveyance) Legal nka Deed (Reconveyance of Trust Indenture) Legal</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	System Admin		809148
Renamed from 'Deed (Reconveyance) Legal' to 'Deed (Reconveyance of Trust Indenture) Legal' in the doc tree.			
<b>Affected item(s):</b> MTD0061.doc - Deed (Reconveyance of Trust Indenture) Legal			

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<i>Deed (Reconveyance) nka Deed (Reconveyance of Trust Indenture)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	System Admin		809146
Renamed document from 'Deed (Reconveyance)' to 'Deed (Reconveyance of Trust Indenture)'.			
<b>Affected item(s):</b> MTD0222.doc - Deed (Reconveyance of Trust Indenture)			

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<i>Disabled Deeds (4)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	System Admin		811732
Documents have been disabled and removed from trees.			
<b>Affected item(s):</b> MTD0220.doc - Deed (Special-Limited Warranty) MTD0001.doc - Deed (Special-Limited Warranty) Legal MTD0221.doc - Deed (Special Warranty) MTD0004.doc - Deed (Special Warranty) Legal			

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<i>Lien Waiver and Receipt (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	System Admin		810153
Added logic to pull the below based on what is in the Company Alert field.			
<ul style="list-style-type: none"> <li>W9 - Required</li> <li>W9 - On Record</li> <li>W9 - Not Applicable</li> </ul>			
<b>Affected item(s):</b> MTD0036.doc - Lien Waiver and Receipt MTD0226.doc - Lien Waiver and Receipt (Blank)			

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## RELEASE NOTES

APRIL 2024

### Reconveyance of Deed of Trust (Full) (2)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	System Admin		808924
Updated to pull the correct field for the recording date.			
<b>Affected item(s):</b> MTD0212.doc - Reconveyance of Deed of Trust (Full) MTD0242.doc - Reconveyance of Deed of Trust (Full) - Legal			

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### Reconveyance of Deed of Trusts (4)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	System Admin		809150
Updated signature section and all take into consideration 'Print as attachment'.			
<b>Affected item(s):</b> MTD0212.doc - Reconveyance of Deed of Trust (Full) MTD0242.doc - Reconveyance of Deed of Trust (Full) - Legal MTD0241.doc - Reconveyance of Deed of Trust (Partial) MTD0243.doc - Reconveyance of Deed of Trust (Partial) - Legal			

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NEW MEXICO

DOCUMENTS

Escrow/Title

<a href="#"><i>Agreement (Sole and Separate)</i></a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> Lynda McCutcheon	<b>Incident No.</b>	<b>TFS No.</b> 810581
Please render full document for changes.			
<b>Affected item(s):</b> NMD1167.doc - Agreement (Sole and Separate)			

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INTEGRATIONS

*Rate Validation Tool*

New/Mod	Requested By	Incident No.	DEVOPS No.
---------	--------------	--------------	------------

Mod

This release includes:

- Support added for Foreclosure transaction type across all Underwriters.
  - Loan Policy Code: NMXX-10 Limited Pre-Foreclosure
  - Loan Policy Version: Limited Pre-Foreclosure Title Insurance Policy (NM 41)
  - Endorsement Code: NM 42-14
- Support added for any Transaction type: Purchase, Refinance, Equity, Other
  - Loan Policy Code: NMXX-07 Construction Loan

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NEVADA

DOCUMENTS

Escrow

<i>Owner Info Request</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> TT Las Vegas	<b>Incident No.</b> INC240076272	<b>TFS No.</b> 808907
Revised to have blank lines for seller's forwarding address.			
<b>Affected item(s):</b> NVD1269.doc - Owner Info Request			

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<i>Recording Cover Page</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> State Counsel	<b>Incident No.</b>	<b>TFS No.</b> 811092
Text for NRS 230b.030 added and removed reference to \$1.00 and black ink.			
<div style="border: 1px solid black; padding: 10px;"> <p><b>RECORDING REQUESTED BY AND RETURN TO:</b> Escrow Office Name 100 Escrow Office Street EO City, NV 54545</p> <p>The undersigned hereby affirms that this document submitted for recording does not contain the social security number of any person or persons. (Pursuant to NRS 239b.030)</p> <hr/> <p style="text-align: center;"><b>DOC TITLE</b> (Title on Document)</p> <p>This page is added to provide additional information required by NRS 111.312 Sections 1-2.</p> </div>			
<b>Affected item(s):</b> NVD1293.doc - Recording Cover Page			

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REPORTS

*HUD/CDF Settlement Statements*

New/Mod	Requested By	Incident No.	TFS No.
Change Request	TT Reno Admin/Config		806012
<p>Added Escrow Officer's initials to the right of the order number.</p> <p><b>Affected item(s):</b>  SSCORPD5454.spdoc - Settlement Statements  SSCORP5241.rpt - SPAdmin Settlement Statement Programming Notes  SSCORPD5461.rpt - Individual Settlement Statement, Letter (CDF)  SSCORPD1824.rpt - Individual Settlement Statement, Letter  SSCORPD5460.rpt - Individual Settlement Statement, Legal (CDF)  SSCORPD1823.rpt - Individual Settlement Statement, Legal</p>			

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*Sales Rep Analysis*

New/Mod	Requested By	Incident No.	TFS No.
Change Request	TT Reno Admin		809952
<p>Updated Title Premium to only include TP bill code for TT Reno. Changed the Excel checkbox to a dropdown to add a Brief Excel export that will omit Contacts' addresses and e-mails, in addition, only title premium will show broken down by Owners and Lenders.</p> <p><b>Affected item(s):</b>  SSCORP5519.rpt - Sales Rep Analysis</p>			

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NEW YORK

DOCUMENTS

Title

*Master Commitment - Schedule A1 Description (NY - RH-GC)*  
*Master Commitment (NY - RH-GC)*  
*Master Commitment (NY) (Cooperative Plus)*  
*Master Loan Policy (NY) (Cooperative Plus)*  
*Master Owner's Policy (NY) (Cooperative Plus)*  
*Cooperative Plus Commitment (Schedule A-1)*  
*Cooperative Plus Loan Policy (Schedule A - Legal Description)*  
*Cooperative Plus Owner's Policy (Schedule A - Legal Description)*

<b>New/Mod</b>	<b>Requested By</b>	<b>Incident No.</b>	<b>TFS No.</b>
Change Request	NY Garden City		811390

The Tax Map ID will now appear above the legal description for the Garden City/Westbury title office, as is does for the Riverhead office.

**Affected item(s):**

- NYD1258.doc - Master Commitment (NY - RH-GC)
- NYD1320.doc - Master Commitment (NY) (Cooperative Plus)
- NYD1421.doc - Master Commitment - Schedule A (NY - RH-GC)
- NYD1422.doc - Master Commitment - Schedule A1 Description (NY - RH-GC)
- NYD1321.doc - Master Loan Policy (NY) (Cooperative Plus)
- NYD1322.doc - Master Owner's Policy (NY) (Cooperative Plus)
- NYD1428.doc - Cooperative Plus Commitment (Schedule A-1)
- NYD1499.doc - Cooperative Plus Loan Policy (Schedule A - Legal Description)
- NYD1505.doc - Cooperative Plus Owner's Policy (Schedule A - Legal Description)

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OHIO

DOCUMENTS

Escrow

<a href="#"><i>Special Assessment Record Search (Macedonia)</i></a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> CT FNOX	<b>Incident No.</b>	<b>TFS No.</b> 810147
Updated to most recent version.			
<b>Affected item(s):</b> OHD1365.doc - Special Assessment Record Search (Macedonia)			

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OKLAHOMA

REPORTS

<i>Smith Brothers Monthly Bonus Report</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> AllFirst OK Admin	<b>Incident No.</b>	<b>TFS No.</b> 809062
Changed task search "Final Search Completed" to "Final Search Complete".			
<b>Affected item(s):</b> SSCORP5587.rpt - Smith Brothers Monthly Bonus Report			

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OREGON

DOCUMENTS

Escrow

<a href="#"><i>Absentee Letters (3)</i></a>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Liberty Title		808883
Updated to pull contacts from the file for WT-Bend Oregon operations.			
<b>Affected item(s):</b> SSCORPD5832.doc - Letter (Transaction Confirmation) SSCORPD5880.doc - Letter (Notice Transaction Confirmation-Absentee Owner) TBD SSCORPD5923.doc - Letter (Listing - Absentee Owner)			

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<a href="#"><i>Acknowledgment (All Purpose - CA)</i></a>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	System Admin		810175
New document. Please render to view in full.			
<b>Affected item(s):</b> ORD1530.doc - Acknowledgment (All Purpose - CA)			

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<a href="#"><i>Instructions (Recording)</i></a>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	System Admin	INC240115426	811622
Updated email addresses.			
<b>Affected item(s):</b> ORD1037.doc - Instructions (Recording) Legal ORD1470.doc - Instructions (Recording)			

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REPORTS

<i>Transaction Form</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> NW IT	<b>Incident No.</b>	<b>TFS No.</b> 809737
Updated to pull the date next to the signature for all operations in OR.			
<b><u>Affected item(s):</u></b> SSCORP5002.rpt - Transaction Form			

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TEXAS

DOCUMENTS

Escrow

*Form T-00 (Verification of Services Rendered) Title Only - No Issue*

<b>New/Mod</b> Change Request	<b>Requested By</b> TX	<b>Incident No.</b> INC240092583	<b>TFS No.</b> 810140
----------------------------------	---------------------------	-------------------------------------	--------------------------

Updated address for Section 1, Part 3:

3. INFORMATION ABOUT AGENT/ENTITY DOING THE WORK:

Type of entity:  Texas Underwriter     Texas Title Agent  
 Texas Attorney at Law or Texas PC organized to provide legal services

Name: Chicago Title Insurance Company

Address: 4600 Fuller Drive, Suite 400

City, State/ZIP: Irving, Texas 75038

Firm ID Number or Texas State Bar Number: 91965

**Affected item(s):**  
SSTXD00273.doc - Form T-00 (Verification of Services Rendered) Title Only - No Issue

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*Notary Acknowledgments*

<b>New/Mod</b> Change Request	<b>Requested By</b> Elise Kitchens	<b>Incident No.</b>	<b>TFS No.</b> 810128
----------------------------------	---------------------------------------	---------------------	--------------------------

Updated to look to the notary and acknowledgement screen first and to pull what is entered in those fields. If those fields are left empty, the acknowledgements will continue to work as they always have.

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INTEGRATIONS

*Rate Validation Tool*

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

This release includes:

- Mapped **Transaction type** to Property Purchase for the following **Simultaneous Policy codes** across all Underwriters.
  - > Simultaneous-XXX
  - > Simultaneous-XXX with prior binder discount
  - > Simultaneous-XXX with prior binder plus owner's policy discount
  - > Simultaneous-XXX with prior owner's policy discount

**Title Insurance Premium Selection**

State: TX

Zone / Area:

Underwriter: U [Chicago Title Insurance Company](#)

Policy type: Simultaneous

Policy code: **Simultaneous-CTI with prior owner's policy discount**

- Simultaneous-CTI
- Simultaneous-CTI with prior binder discount
- Simultaneous-CTI with prior binder plus owner's policy discount
- Simultaneous-CTI with prior owner's policy discount

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WASHINGTON

DOCUMENTS

Escrow

<i>Closing Order and Recording Instructions</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	System Admin		811624
Updated email addresses.			
<b>Affected item(s):</b> WA00000367.doc - Closing Order and Recording Instructions			

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<i>Real Estate Excise Tax Affidavits (5)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	System Admin		810167
Updated to most recent version.			
<b>Affected item(s):</b> WA00000306.doc - MH Real Estate Excise Tax Affidavit WA00001088.doc - Master Real Estate Excise Tax Affidavit (2023) WA00001089.doc - Master Real Estate Excise Tax Affidavit (2023) Multiple Location WA00001090.doc - Master Real Estate Excise Tax Affidavit - Exempt (2023) WA00001091.doc - Master Real Estate Excise Tax Affidavit (2023) Multiple Affidavits			

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<i>Real Estate Excise Tax Certification (Co-Signor Exemption)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	WA		808912
New document. Please render to view in full.			
<b>Affected item(s):</b> WA00001097.doc - Real Estate Excise Tax Certification (Co-Signor Exemption)			

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LIBERTY TITLE

DOCUMENTS

Escrow

Absentee Letters (3)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Liberty Title		808883

Exchanged personal email for group email.

**Affected item(s):**

- SSCORPD5832.doc - Letter (Transaction Confirmation)
- SSCORPD5880.doc - Letter (Notice Transaction Confirmation-Absentee Owner) TBD
- SSCORPD5923.doc - Letter (Listing - Absentee Owner)

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Punch List (RI)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Liberty Title	INC240088048	810149

Added items 4 and 5:

YES

NO: Are we preparing a POA for them? If so, please provide information for designated agent:

\_\_\_\_\_

(Note: Seller will need to sign Deed at time of POA signing. POA is not to be used for Deed.)

4. Seller Marital Status:  Single  Married  Divorced  Widow / Widower

5. State Resident of \_\_\_\_\_ \*NOTE: System should pull state from property tab  Yes  No

Attached is a Seller Authorization form in order to obtain mortgage payoff information. Please have this signed and filled in with the appropriate information and send back to us via email or fax.

If there is any other information regarding the Seller(s) that would be of importance with regards to this file, please advise in order to accommodate the facilitation of this closing to best suit all parties.

**Affected item(s):**

- LIBD1149.doc - Punch List (RI)

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NOVARE NATIONAL SETTLEMENT SERVICES

REPORTS

<i>TAT Report by Tasking</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> Nov Admin	<b>Incident No.</b>	<b>TFS No.</b> 807466
Updated column labels and logic and added several columns.			
<b>Affected item(s):</b> SSCORP5602.rpt - TAT Report by Tasking			

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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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