

SOFTPRO SELECT

June 2024

RELEASE NOTES



Testing Release Date: May 31, 2024
Production Release Date: June 10, 2024



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<i>Affiliated Business Arrangement Disclosure Statement (esign)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	EPU	INC240150885	819492
New document created for esign capability. Please render to view in full.			
Affected item(s): SSCORPD5945.doc - Affiliated Business Arrangement Disclosure Statement (esign)			

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<i>Disclosure Related to Escrowed Funds</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNF Corporate		821078
Removed the opt out box, per corporate: if they do not agree they should not sign.			
Affected item(s): SSCORPD5928.doc - Disclosure Related to Escrowed Funds			

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<i>Indemnity and Security Agreement (With Deposit)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNF Corporate		821074
Added above ARBITRATION paragraph: Escrow Trustee will deposit and hold Escrow Funds in an escrow account, together with similar funds from other transactions, at a FDIC insured trust company, bank, savings bank, savings association, or other financial services entity. It is understood and the parties hereby consent to Escrow Trustee depositing or transferring Escrow Funds into an interest-bearing escrow account, and that any interest earned, or other financial benefits received, on such account(s) shall be retained by Escrow Trustee.			
Affected item(s): SSCORPD5621.doc - Indemnity and Security Agreement (With Deposit)			

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<i>Soliciting Customer Wire Instructions (3)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Settlement		819982
Rearranged how the WARNING and Account Name appear.			
Affected item(s): SCA0000096.doc - Disbursement of Proceeds-Refunds SSCORPD1895.doc - EI - Disbursement SSCORPD5366.doc - EI - Disbursement (Legal)			

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Title

[PRO FORMA Updates based on Underwriting Bulletin 2024-RC-02](#)

New/Mod Change Request	Requested By Corporate Counsel	Incident No.	TFS No. 814831
----------------------------------	------------------------------------------	---------------------	--------------------------

Per Underwriting Bulletin 2024-RC-02, all Loan Policies, Owner's Policies and Endorsements have been updated per the following for Pro forma transactions:

1. New language now shows in the footers
2. The Policy number is no longer to show - only the Pro forma reference in the number field.
3. The President and Secretary signatures are replaced with a Pro forma reference.
4. Proforma references to show for Coverage amount, if operation has elected to also show the amount.

Affected item(s):

- 101046D0105.doc - ALTA Loan Policy 2006 (NC)
- 101046D0106.doc - ALTA Owner's Policy 2006 (NC)
- 101046D0107.doc - ALTA Homeowner's Policy of Title Insurance 2013 (NC)
- 101046D0108.doc - ALTA Short Form Residential Loan Policy 2012 (NC)
- AKD1003.doc - ALTA Loan Policy 2006 (AK)
- AKD1004.doc - ALTA Owner's Policy 2006 (AK)
- AKD1005.doc - ALTA Homeowner's Policy of Title Insurance 2013 (AK)
- AKD1006.doc - ALTA Short Form Residential Loan Policy 2012 (AK)
- ALD1003.doc - ALTA Owner's Policy 2006 (AL)
- ALD1004.doc - ALTA Loan Policy 2006 (AL)
- ALD1021.doc - ALTA Homeowner's Policy of Title Insurance 2013 (AL)
- ALD1024.doc - ALTA Short Form Residential Loan Policy 2012 (AL)
- ARD1003.doc - ALTA Owner's Policy 2006 (AR)
- ARD1004.doc - ALTA Loan Policy 2006 (AR)
- ARD1016.doc - ALTA Homeowner's Policy of Title Insurance 2013 (AR)
- ARD1017.doc - ALTA Short Form Residential Loan Policy 2012 (AR)
- AZD1244.doc - ALTA Owner's Policy 2006 (AZ)
- AZD1245.doc - ALTA Loan Policy 2006 (AZ)
- AZD1252.doc - ALTA Homeowner's Policy of Title Insurance 2013 (AZ)
- AZD1253.doc - ALTA Short Form Residential Loan Policy 2012 (AZ)
- COD1079.doc - ALTA Owner's Policy 2006 (CO)
- COD1080.doc - ALTA Loan Policy 2006 (CO)
- COMD1104.doc - ALTA Owner's Policy 2006 (DC VA MD)
- COMD1105.doc - ALTA Loan Policy 2006 (DC VA MD)
- COMD1106.doc - ALTA Owner's Policy 2006 (GL)
- COMD1107.doc - ALTA Loan Policy 2006 (GL)
- COMD1108.doc - ALTA Owner's Policy 2006 (PA)
- COMD1109.doc - ALTA Loan Policy 2006 (PA)
- COMD1110.doc - ALTA Owner's Policy 2006 (IL)
- COMD1111.doc - ALTA Loan Policy 2006 (IL)
- COMD1112.doc - ALTA Owner's Policy 2006 (GA)
- COMD1113.doc - ALTA Loan Policy 2006 (GA)
- COMD1144.doc - ALTA Owner's Policy 2006 (MA)
- COMD1145.doc - ALTA Loan Policy 2006 (MA)
- COMD1153.doc - ALTA Homeowner's Policy of Title Insurance 2013 (DC MD VA)
- COMD1185.doc - ALTA Homeowner's Policy of Title Insurance 2021 (DC MD VA)
- CTD1002.doc - ALTA Owner's Policy 2006 (CT)
- CTD1003.doc - ALTA Loan Policy 2006 (CT)
- CTD1025.doc - ALTA Homeowner's Policy of Title Insurance 2013 (CT)
- DED1002.doc - ALTA Owner's Policy 2006 (DE)
- DED1003.doc - ALTA Loan Policy 2006 (DE)
- DED1005.doc - ALTA Homeowner's Policy of Title Insurance 2013 (DE)
- FLD1329.doc - ALTA Loan Policy 2006 (FL)
- FLD1330.doc - ALTA Owner's Policy 2006 (FL)
- HID1244.doc - ALTA Owner's Policy 2006 (HI)
- HID1245.doc - ALTA Loan Policy 2006 (HI)
- HID1266.doc - ALTA Homeowner's Policy of Title Insurance 2013 (HI)
- IAD1007.doc - ALTA Owner's Policy 2006 (IA)
- IAD1008.doc - ALTA Loan Policy 2006 (IA)
- IAD1011.doc - ALTA Homeowner's Policy of Title Insurance 2013 (IA)
- IDD1145.doc - ALTA Loan Policy 2006 (ID)
- IDD1146.doc - ALTA Owner's Policy 2006 (ID)
- IDD1148.doc - ALTA Homeowner's Policy of Title Insurance 2013 (ID)
- IDD1149.doc - ALTA Short Form Residential Loan Policy 2012 (ID)

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PRO FORMA Updates based on Underwriting Bulletin 2024-RC-02 (continued)

Affected item(s):

- IND1296.doc - ALTA Homeowner's Policy of Title Insurance 2013 (IN)
- IND1313.doc - ALTA Loan Policy 2006 (IN)
- IND1314.doc - ALTA Owner's Policy 2006 (IN)
- KYD1002.doc - ALTA Owner's Policy 2006 (KY)
- KYD1003.doc - ALTA Loan Policy 2006 (KY)
- KYD1004.doc - ALTA Homeowner's Policy of Title Insurance 2013 (KY)
- LAD1144.doc - ALTA Owner's Policy 2006 (LA)
- LAD1145.doc - ALTA Loan Policy 2006 (LA)
- LAD1160.doc - ALTA Homeowner's Policy of Title Insurance 2013 (LA)
- MAD1026.doc - ALTA Homeowner's Policy of Title Insurance 2013 (MA)
- MED1002.doc - ALTA Loan Policy 2006 (ME)
- MED1003.doc - ALTA Owner's Policy 2006 (ME)
- MED1039.doc - ALTA Homeowner's Policy of Title Insurance 2013 (ME)
- MED1040.doc - ALTA Short Form Residential Loan Policy 2012 (ME)
- MID1294.doc - ALTA Owner's Policy 2006 (MI)
- MID1295.doc - ALTA Loan Policy 2006 (MI)
- MID1303.doc - ALTA Homeowner's Policy of Title Insurance 2013 (MI)
- MND1098.doc - ALTA Homeowner's Policy of Title Insurance 2013 (MN)
- MND1119.doc - ALTA Loan Policy 2006 (MN)
- MND1120.doc - ALTA Owner's Policy 2006 (MN)
- MOD1184.doc - ALTA Owner's Policy 2006 (KS MO NE)
- MOD1185.doc - ALTA Loan Policy 2006 (KS MO NE)
- MOD1193.doc - ALTA Homeowner's Policy of Title Insurance 2013 (KS MO NE)
- MSD1002.doc - ALTA Owner's Policy 2006 (MS)
- MSD1003.doc - ALTA Loan Policy 2006 (MS)
- MSD1023.doc - ALTA Homeowner's Policy of Title Insurance 2013 (MS)
- MTD0197.doc - ALTA Owner's Policy 2006 (MT)
- MTD0198.doc - ALTA Loan Policy 2006 (MT)
- MTD0200.doc - ALTA Homeowner's Policy of Title Insurance 2013 (MT)
- MTD0202.doc - ALTA Short Form Residential Loan Policy 2012 (MT)
- NDD1002.doc - ALTA Loan Policy 2006 (ND)
- NDD1003.doc - ALTA Owner's Policy 2006 (ND)
- NDD1004.doc - ALTA Homeowner's Policy of Title Insurance 2013 (ND)
- NHD1004.doc - ALTA Owner's Policy 2006 (NH)
- NHD1005.doc - ALTA Loan Policy 2006 (NH)
- NHD1011.doc - ALTA Homeowner's Policy of Title Insurance 2013 (NH)
- NHD1012.doc - ALTA Short Form Residential Loan Policy 2012 (NH)
- NJD1111.doc - ALTA Loan Policy 2006 (NJ)
- NJD1112.doc - ALTA Owner's Policy 2006 (NJ)
- NJD1113.doc - ALTA Owner's Policy 2006 (NJ) (Schedules Only)
- NJD1114.doc - ALTA Loan Policy 2006 (NJ) (Schedules Only)
- NJD1120.doc - ALTA Homeowner's Policy of Title Insurance 2013 (NJ) DO NOT USE
- NMD1172.doc - Loan Policy 2006 (NM 2)
- NMD1173.doc - Owner's Policy 2006 (NM 1)
- NVD1023.doc - ALTA Homeowner's Policy of Title Insurance 2013 (NV)
- NVD1026.doc - ALTA Owner's Policy 2006 (NV)
- NVD1027.doc - ALTA Loan Policy 2006 (NV)
- NVD1131.doc - ALTA Short Form Residential Loan Policy 2012 (NV)
- OHD1387.doc - ALTA Homeowner's Policy of Title Insurance 2013 (OH)
- OHD1418.doc - ALTA Owner's Policy 2006 (OH)
- OHD1419.doc - ALTA Loan Policy 2006 (OH)
- OHD1434.doc - ALTA Short Form Residential Loan Policy 2012 (OH)
- OKD1195.doc - ALTA Loan Policy 2006 (OK)
- OKD1196.doc - ALTA Owner's Policy 2006 (OK)
- OKD1198.doc - ALTA Homeowner's Policy of Title Insurance 2013 (OK)
- ORD1296.doc - Master Guarantee (OR)
- PAD1075.doc - ALTA Homeowner's Policy of Title Insurance 2013 (PA)
- RID1002.doc - ALTA Loan Policy 2006 (RI)
- RID1003.doc - ALTA Owner's Policy 2006 (RI)
- RID1016.doc - ALTA Homeowner's Policy of Title Insurance 2013 (RI)
- RID1017.doc - ALTA Short Form Residential Loan Policy 2012 (RI)
- SCA0002866.doc - ALTA Owner's Policy 2006 (CA)
- SCA0002867.doc - ALTA Loan Policy 2006 (CA)
- SCA0002907.doc - ALTA Homeowner's Policy of Title Insurance 2013 (CA)
- SCA0002911.doc - ALTA Short Form Residential Loan Policy 2012 (CA)
- SCD1063.doc - ALTA Loan Policy 2006 (SC)
- SCD1064.doc - ALTA Owner's Policy 2006 (SC)
- SCD1066.doc - ALTA Homeowner's Policy of Title Insurance 2013 (SC)
- SCD1067.doc - ALTA Short Form Residential Loan Policy 2012 (SC)

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PRO FORMA Updates based on Underwriting Bulletin 2024-RC-02 (continued)

Affected item(s):

- SDD1002.doc - ALTA Owner's Policy 2006 (SD)
- SDD1003.doc - ALTA Loan Policy 2006 (SD)
- SDD1004.doc - ALTA Homeowner's Policy of Title Insurance 2013 (SD)
- TND1003.doc - ALTA Owner's Policy 2006 (TN)
- TND1004.doc - ALTA Loan Policy 2006 (TN)
- TND1006.doc - ALTA Homeowner's Policy of Title Insurance 2013 (TN)
- UTD1003.doc - ALTA Owner's Policy 2006 (UT)
- UTD1004.doc - ALTA Loan Policy 2006 (UT)
- UTD1006.doc - ALTA Homeowner's Policy of Title Insurance 2013 (UT)
- UTD1007.doc - ALTA Short Form Residential Loan Policy 2012 (UT)
- VTD0001.doc - ALTA Owner's Policy 2006 (VT)
- VTD0002.doc - ALTA Loan Policy 2006 (VT)
- VTD0003.doc - ALTA Homeowner's Policy of Title Insurance 2013 (VT)
- VTD0004.doc - ALTA Short Form Residential Loan Policy 2012 (VT)
- WA00001061.doc - ALTA Owner's Policy 2006 (WA)
- WA00001062.doc - ALTA Loan Policy 2006 (WA)
- WA00001076.doc - ALTA Homeowner's Policy of Title Insurance 2013 (WA)
- WID0281.doc - ALTA Loan Policy 2006 (WI)
- WID0282.doc - ALTA Owner's Policy 2006 (WI)
- WVD1005.doc - ALTA Owner's Policy 2006 (WV)
- WVD1006.doc - ALTA Loan Policy 2006 (WV)
- WVD1007.doc - ALTA Homeowner's Policy of Title Insurance 2013 (WV)
- WYD1003.doc - ALTA Owner's Policy 2006 (WY)
- WYD1004.doc - ALTA Loan Policy 2006 (WY)
- WYD1005.doc - ALTA Homeowner's Policy of Title Insurance 2013 (WY)
- WYD1006.doc - ALTA Short Form Residential Loan Policy 2012 (WY)

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REPORTS

<i>1099-S Exceptions by Branch, Escrow Officer/Closer</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	DSG Admin		819094
Added Trust Account picklist.			
Affected item(s): SSCORP0001.rpt - 1099-S Exceptions by Branch, Escrow Officer/Closer			

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<i>Batch Privacy Notice Letter</i>			
New/Mod	Requested By	Incident No.	TFS No.
Fix	TG HW		817920
Removed duplicated signature when Buyer and Seller are the same person.			
Affected item(s): SSCORP5406.rpt - Batch Privacy Notice Letter			

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<i>Disbursements by Payee</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	DSG Admin		819113
Added Report Type option to select between "Trust Accounting Date and "Transaction Date". When "Transaction date" is selected the Posted By user will display as the "Disburser".			
Affected item(s): SSCORP0028.rpt - Disbursements by Payee			

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<i>EPU Task Summary/Productivity by County Manager</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	LT SoCal Admin		816361
Updated as follows:			
<ol style="list-style-type: none"> 1. Added checkbox parameter "Use Requested Date." When checked, tasks with a requested dated will show, instead of tasks with a completed date. 2. For LT SoCal, "CA-LTIC SoCal EPRO Tasks" columns have been updated. 			
Affected item(s): SSCORP5149.rpt - EPU Task Summary/Productivity by County Manager			

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<i>Escrow Trial Balance</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	DSG Admin		819101
Removed the column for flash codes as it corrupts DSG's templates for Excel spreadsheets.			
Affected item(s): SSCORP0003.rpt - Escrow Trial Balance			

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Invoice Aging

New/Mod	Requested By	Incident No.	TFS No.
Change Request	MidSouth Agency Admin		818104

Added Free text field parameter for Bill Codes, separated by a comma.

Affected item(s):

SSCORP5036.rpt - Invoice Aging

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Orders by {Selection}

New/Mod	Requested By	Incident No.	TFS No.
Change Request	LT SoCal Admin		818262

The FinCen Excel version was updated to show the Branch, not the Brand.

Affected item(s):

SSCORP5082.rpt - Orders by {Selection}

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Orders by Settlement Date

New/Mod	Requested By	Incident No.	TFS No.
Change Request	NCS - Houston Admin		818630

Added an HOU-NCS version for NCS Houston - Sugar Land.

Affected item(s):

SSCORP5288.rpt - Orders by Settlement Date

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Orders by Transaction Type

New/Mod	Requested By	Incident No.	TFS No.
Change Request	LT SoCal Admin		819164

Added "Additional Project Type/Transaction Type" to the Group by dropdown.

Affected item(s):

SSCORP5481.rpt - Orders by Transaction Type

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Outstanding Checks

New/Mod	Requested By	Incident No.	TFS No.
Change Request	DSG Admin		819096

Removed the column for flash codes as it corrupts DSG's templates for Excel spreadsheets.

Affected item(s):

SSCORP0008.rpt - Outstanding Checks

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<u>Settlement Statements (CSS)</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	NCS CA CT Admin - Config		817006
<p>Updated the following:</p> <p>1. "RE" encode logic to have the endorsements be listed as they do now (Codes, comma separated) or to show the full descriptions with amount.</p> <p>2. "To/From payee/payor" logic update where, when EMD charges are in lines for any "CON" or "TCON" sections, it will show as "From" and Payor.</p> <p>If the charge needs to show as "To" and the payee, then the EMD deposit needs to be sent to a section other than "CON" or "TCON."</p> <p>3. Updated current charge name logic:</p> <p><i>The contact payee name is shown when the charge name is not user entered.</i></p> <p>updated to when there is a formula on the charge name the charge name value is shown, ie the result of the formula.</p> <p>4. Property Statement:</p> <p>- Updated so when the "Site Number/Name box" is checked and the site number or name is blank, the statement will render.</p> <p>Affected item(s): SSCORPD3006.spdoc - Master Statement (CSS) SSCORPD3007.spdoc - Buyer/Borrower Statement (CSS) SSCORPD3008.spdoc - Seller's Statement (CSS) SSCORPD3009.spdoc - Individual Statement (CSS) SSCORPD3010.spdoc - Property Statement (CSS) SSCORP5241.rpt - SPAdmin Settlement Statement Programming Notes</p>			

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<u>Single Ledger Balance by Order Transfer</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Reports Team		815261
<p>Updated to show the new Transaction Note added in the register, per transaction and added Programming Notes</p> <p>Affected item(s): SSCORP0016.rpt - Single Ledger Balance by Order Transfer</p>			

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ARIZONA

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<i>El - Disbursement</i>			
New/Mod Change Request	Requested By CT Phoenix	Incident No.	TFS No. 820135
Buyer names flow to the document on Purchase transactions.			
Affected item(s): SSCORPD1895.doc - El - Disbursement SSCORPD5366.doc - El - Disbursement (Legal)			

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<i>Letter (Owner's Policy Cover)</i>			
New/Mod Change Request	Requested By CT NV	Incident No. INC240179819	TFS No. 820471
Added email address to addressee section.			
Affected item(s): AZD1060.doc - Letter (Owner's Policy Cover)			

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<i>Letter (Statement of Identity)</i>			
New/Mod Change Request	Requested By Grand Canyon and LT	Incident No. INC240169570	TFS No. 819421
Corrected the last sentence in the first paragraph to end with "...do our job more efficiently."			
Affected item(s): AZD1061.doc - Letter (Statement of Identity)			

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PHRASES

EI Phrases (2)			
New/Mod New Request	Requested By CT/FT Mohave\La Paz	Incident No. INC240173038 and INC240182621	TFS No. 819388
<p>New Phrases added:</p> <p><u>MH Certificate of Occupancy / Code: mh17</u> CERTIFICATE OF OCCUPANCY: Certificate of Occupancy issued upon the completion of new Manufactured Home being placed on subject property. General Manager of [Pulls Seller Name] may provide written request for proceeds <i>in lieu of</i> Certificate of Occupancy if new Manufactured Home has been delivered to subject property.</p> <p><u>Trust Certification / Code: trust01</u> TRUST CERTIFICATION: Seller shall deposit with Escrow Agent a currently dated Trust Certification stating the Trust has not been revoked and disclosing any amendments thereto. Seller to also comply with Arizona Revised Statute Section 33-404 relating to naming of record the Beneficiaries of said Trust, with their addresses and identification of such Trust Agreement.</p>			

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CALIFORNIA

DOCUMENTS

Escrow

<i>Disbursement of Proceeds-Refunds</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Santa Clara		819401
For CT Santa Clara a custom field was added for Account Name, if left blank then a line will pull to the form.			
Affected item(s): SCA0000096.doc - Disbursement of Proceeds-Refunds			

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<i>EI Authorization to Pay Bills</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CA		818909
Corrected formatting for Acct. No. line.			
Affected item(s): SCA0000039.doc - EI Authorization to Pay Bills			

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<i>Exemption Declaration</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	CA		820982
New document. Please render to view in full.			
Affected item(s): SCA0003185.doc - Exemption Declaration			

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<i>Indemnity Agreement - Gap Undertaking</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	SoCal	INC240175850	818872
Corrected determine to terminate in the first paragraph after item 3.			
Affected item(s): SCA0002002.doc - Indemnity Agreement - Gap Undertaking			

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<i>Letter (Intro to WireSafe Fraud Alert)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT SoCal	INC240196474	820469
Added ability to choose "other" as contact to render or people addressee under the seller and buyer contacts if they are entities.			
Affected item(s): SSCORPD5544.doc - Letter (Intro to WireSafe Fraud Alert)			

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RELEASE NOTES

JUNE 2024

Letter (Transaction Confirmation)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	FT Santa Clara		820013

Added escrow officer's phone number to the bolded paragraph.

Affected item(s):

SSCORPD5832.doc - Letter (Transaction Confirmation)

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MH Tax Clearance Request Form (San Diego County)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT CA		819488

NEW OWNER, EXEMPTIONS and REQUESTOR CONTACT INFORMATION have been updated. Please render to view in full.

Affected item(s):

SCA0002406.doc - MH Tax Clearance Request Form (San Diego County)

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Note Straight

New/Mod	Requested By	Incident No.	TFS No.
Change Request	CA	INC240174913	819760

Added prompt for prepayment penalty.

Affected item(s):

SCA0000239.doc - Note Straight

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Recording and Policy Instructions (w/ Notes)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Alameda		819448

Updated document to favor sending policies via email.

Affected item(s):

SCA0001021.doc - Recording and Policy Instructions (w/ Notes)

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Separate Memorandum of Inst to Pay Commission – Listing-Selling

New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT SoCal		820009

Corrected how the information pulls to the document. Please render to view in full.

Affected item(s):

SCA0002557.doc - Separate Memorandum of Inst to Pay Commission – Listing-Selling

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Escrow and Title Charges Screen

New/Mod Mod	Requested By Kim Dawson	Incident No.	TFS No.
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The **Escrow and Title Charges** screen has been updated to include the following fields:

- > **Settlement date/time**
- > **Estimated date/time** check box

These changes are visible when the **My Screens > SoCal Title Screens LT** is selected.

The screenshot shows the 'Escrow and Title Charges' screen. At the top, there are navigation arrows and the title 'Escrow and Title Charges'. Below this, a red circle highlights two new fields: 'Settlement date/time: (None)' with a dropdown arrow, and a checkbox labeled 'Estimated date/time'. Below these fields is a section titled 'Rate Summary Responses' with a '+' and '-' icon. At the bottom, there is a table with the following columns: Description, Charge, Issued Date, Effective Date, and Line.

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File Coversheet Screen

New/Mod Mod	Requested By Kim Dawson	Incident No.	TFS No.
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The **File Coversheet** screen has been updated as follows:

- > Name change to: **File Details *Informational Only DO NOT EDIT SCREEN***
- > Fields added:
 - > **Escrow Officer**
 - > **Settlement Date**
 - > **Sales Price**
 - > **Listing Agent**
 - > **Opening Date**
 - > **Selling Agent**
 - > **Loan Amount**

These changes are visible when the **My Screens > SoCal Escrow Screens LT** is selected.

File Details *Informational Only DO NOT EDIT SCREEN*
Buyer:
Seller:

File Information

File #:	Escrow Officer:	Sales Price:
Opening Date:	Status:	Loan Amount:
Settlement Date:	Type:	

Property:

Contact Information

Buyer:

Seller:

Title Company:

Sale's Representative:

Listing Agent:

Selling Agent:

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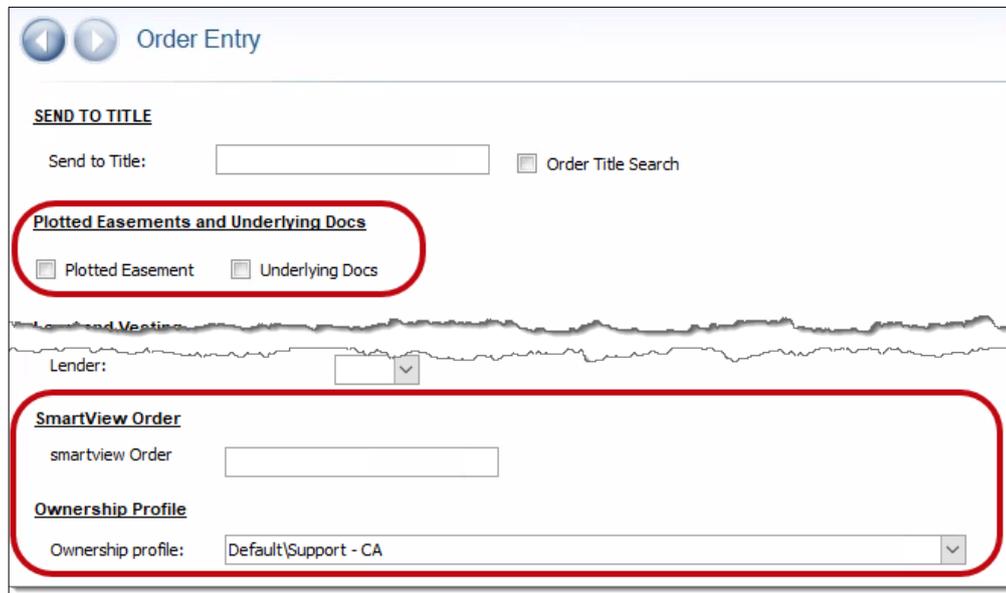
Order Entry Screen

New/Mod Mod	Requested By Kim Dawson	Incident No.	TFS No.
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The **Order Entry** screen has been updated as follows:

- > Fields added:
 - » **Plotted Easements** check box
 - » **Underlying Docs** check box
- > Fields labels corrected:
 - » **SmartView Order**
 - » **Ownership Profile**

These changes are visible when the **My Screens > SoCal Title Screens LT** is selected.



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Order Information Screen

New/Mod Mod	Requested By Kim Dawson	Incident No.	TFS No.
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The **Order Information** screen has been added to the **Open Order/General** screens.

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

The screenshot shows the 'Order Information' screen. On the left, a sidebar lists various options under 'Open Order/General', with 'Order Information' circled in red. The main content area includes the following fields:

- Project name: [Text input field]
- Email subject line: [Text input field with value 'Order XTR.2024-01056']
- Ownership profile: [Dropdown menu with value 'Default\Support - CA']
- Escrow office: [Dropdown menu]
- Escrow officer/Closer: [Text input field]
- Title office: [Dropdown menu]
- Title officer/Examiner: [Text input field]
- Borrower signing date: [Dropdown menu with value '(None)']
- Seller signing date: [Dropdown menu with value '(None)']
- Settlement date/time: [Dropdown menu with value '(None)'] and a checkbox for 'Estimated date/time'.

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Various Screens			
New/Mod	Requested By	Incident No.	TFS No.
Mod	Kim Dawson		

The following screens have been added / updated / removed:

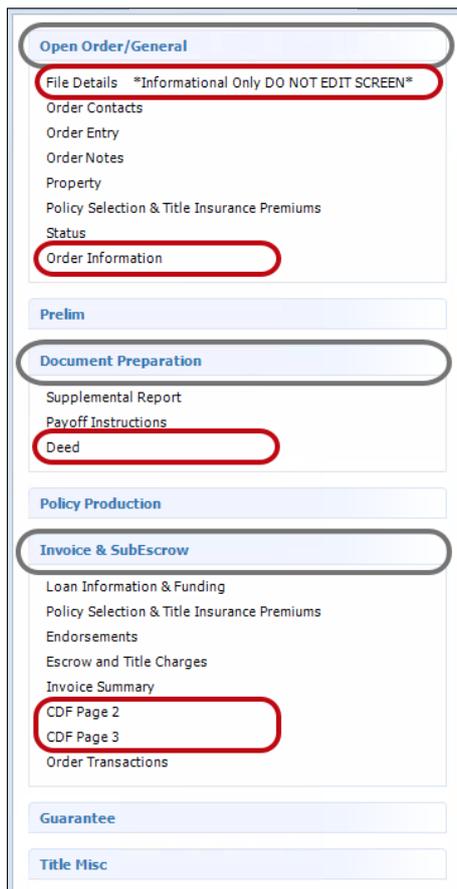
> **Added:**

- (Open Order/General) **File Details *Informational Only DO NOT EDIT SCREEN***
- (Open Order/General) **Order Information**
- (Document Preparation) **Deed**
- (Invoice & SubEscrow) **CDF Page 2**
- (Invoice & SubEscrow) **CDF Page 3**

> **Removed:**

- » (Open Order/General) **File Status**

These changes are visible when the **My Screens > SoCal Title Screens LT** is selected.



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REPORTS

<i>Openings by Marketing Rep w/Splits</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Sho Niizuma		816224
<p>Added "Pre-Listing Converted" to Report Type drop-down.</p> <p>NOTE: This new parameter works in conjunction with the completion of the "Pre-Listing Converted" checklist task</p> <p>Affected item(s): SSCORP5575.rpt - Openings by Marketing Rep w/Splits</p>			

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<i>Order Count/Revenue Summary</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	LT SoCal Admin		818457
<p>Updated for LT SoCal to look at Custom Field "Order.AdditionalDescription_FNF#" for "Title & Escrow" when the Order Type is "Title Only" IF Additional Description shows "Title & Escrow" and the Order Type is "Title Only" then the file will be counted as "Title & Escrow".</p> <p>Affected item(s): SSCORP5092.rpt - Order Count/Revenue Summary</p>			

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<i>SubEscrow Settlement Statement - HUD - CDF - CSS</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNT LA Admin		818452
<p>Updated so any non-zero amounts will show for the payoff calculation. Also calculations without a principal balance/payoff amount will show any non-zero payoff detail.</p> <p>Affected item(s): H_SubEscrow_SettlementStatement_Details_FNF.spdoc</p>			

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<i>Weekly Summary of Business Worksheet</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Config Team		817508
<p>Updated for LT SoCal to look at Custom Field "Order.AdditionalDescription_FNF#" for "Title & Escrow" when the Order Type is "Title Only" IF Additional Description shows "Title & Escrow" and the Order Type is "Title Only" then the file will be counted as "Title & Escrow"</p> <p>Affected item(s): SSCORP5247.rpt - Weekly Summary of Business Worksheet</p>			

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COLORADO

DOCUMENTS

Escrow

<i>Cashier's Check Request</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNT CO	INC240169387	819406
Added 127-Delta for "FSTG" profiles.			
Affected item(s): COD1125.doc - Cashier's Check Request			

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<i>Letter (Indemnity)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Heritage Title		820467
Added dropdown for signature section to choose signor.			
Affected item(s): COD1017.doc - Letter (Indemnity)			

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<i>Lien of Claim Waivers (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	Colorado		819755
'Contractor's Unconditional Lien or Claim Waiver' is now known as 'Contractor's Unconditional Partial Lien or Claim Waiver' and 'Contractor's Unconditional Full Lien Waiver' is a new form, please render to view in full.			
Affected item(s): COD1093.doc - Contractor's Unconditional Partial Lien or Claim Waiver COD1363.doc - Contractor's Unconditional Full Lien Waiver			

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<i>Owners Association Status Request</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Colorado		819446
Updated "Legal Desc" to pull in the Property Address, Lot, Block and Subdivision name.			
Affected item(s): COD1048.doc - Owners Association Status Request			

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<i>Power of Attorney - Buyer</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FT CO		820473
Revised first paragraph to pull from current address information, and if that is empty then it will pull a blank line.			
Affected item(s): COD1186.doc - Power of Attorney - Buyer			

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RELEASE NOTES

JUNE 2024

[Real Property Transfer Declaration \(TD-1000\)](#)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Heritage Title		821164

Updated functionality so that multiple buyers can be chosen on the same form.

Affected item(s):

COD1028.doc - Real Property Transfer Declaration (TD-1000)

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[Release of DOT No Evidence \(2024\) \(2\)](#)

New/Mod	Requested By	Incident No.	TFS No.
New Request	Colorado		820028

New documents. Please render to view in full.

Affected item(s):

COD1364.doc - Release of DOT No Evidence (2024)
COD1365.doc - Release of DOT No Evidence (2024) - Legal

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[TC Release](#)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Heritage Title	INC240189007	819758

Delete the Connie Malonson, Jennifer Williams and Jill Thatcher from Authorized Signatory drop down.

Affected item(s):

COD1130.doc - TC Release

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REPORTS

<i>Statistical Closing Turn-Time</i>			
New/Mod Change Request	Requested By Co HE Admin	Incident No.	TFS No. 817612
Replaced Excel checkbox to dropdown with None (Default PDF), "Excel Standard" (Existing Excel export) and "Excel- CO-HE" (New Excel export which has specific columns and logic).			
Affected item(s): SSCORP5415.rpt - Statistical Closing Turn-Time			

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FLORIDA

DOCUMENTS

Escrow

<i>Date Revisions (4)</i>			
New/Mod Change Request	Requested By Bayshore Title	Incident No. INC0240158370	TFS No. 819439
Revised to look to the settlement date instead of the system date for Bayshore Title.			
Affected item(s): FLD1216.doc - Affidavit (Borrower's Title - All Borrowers) FLD1267.doc - Agreement (Compliance and Tax Proration) FLD1312.doc - Hold Harmless (Homestead Exemption) FLD1311.doc - Post Closing Information (Buyer Vesting)			

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HAWAII

DOCUMENTS

Escrow

<i>Form Information Request - 8300</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	TG HI		819436
Various changes. Please render to view in full.			
Affected item(s): HID1429.doc - Form Information Request - 8300			

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<i>IBA Account Request nka Form IBA Account Request</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	TG HI		819434
Various changes. Please render to view in full.			
Affected item(s): HID1268.doc - Form IBA Account Request			

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<i>Signature Updates (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNT Hawaii		818563
Updated to allow the user to select any buyer and/or seller contact(s) for their signature(s).			
Affected item(s): HID1102.doc - Affidavit (Owner's - Commercial) HID1039.doc - Indemnity Agreement (Mechanics' Liens)			

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ILLINOIS

DOCUMENTS

Escrow

<i>Addition of CIBC Bank USA (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Metro and NCS IL	INC240190357	819886
Added CIBC Bank USA.			
Affected item(s): ILD0181.doc - Investment Options ILD0502.doc - Money Market Account			

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<i>Affidavit (Closing Compliance) (IL)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	St. Louis Title	INC240181956	819591
Removed language regarding property fraud alert notice.			
Affected item(s): ILD0576.doc - Affidavit (Closing Compliance) (IL)			

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<i>Agreement (Owner - No Title)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNF Corporate		821041
Added language to item I. Please render to view in full.			
Affected item(s): ILD0156.doc - Agreement (Owner - No Title)			

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<i>Bank of America Address Change (9)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT IL	INC240186382	819739
Updated Bank of America to the New York address.			
Affected item(s): SSCORPD1807.doc - Wire Information SSCORPD5330.doc - Wire Information (International) SSCORPD5541.doc - WireSafe Fraud Alert SSCORPD5616.doc - WireSafe Fraud Alert (International) SSCORPD5627.doc - WireSafe Fraud Alert (eSign) SSCORPD5680.doc - WireSafe Fraud Alert (Seller Only) SSCORPD5681.doc - WireSafe Fraud Alert (Lender Only) SSCORPD5702.doc - WireSafe Fraud Alert (Refi-Borrower) SSCORPD5808.doc - WireSafe Fraud Alert (International - esign)			

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RELEASE NOTES

JUNE 2024

Cash Escrow Trust Agreement

New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNF Corporate		821068

Added item 7. Escrow Trustee will deposit and hold Escrow Funds in an escrow account, together with similar funds from other transactions, at a FDIC insured trust company, bank, savings bank, savings association, or other financial services entity. It is understood and the parties hereby consent to Escrow Trustee depositing or transferring Escrow Funds into an interest-bearing escrow account, and that any interest earned, or other financial benefits received, on such account(s) shall be retained by Escrow Trustee.

Affected item(s):

ILD0070.doc - Cash Escrow Trust Agreement

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Escrow Agreement (Strict Joint Order)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNF Corporate		821043

Added item V. Escrow Trustee will deposit and hold Escrow Funds in an escrow account, together with similar funds from other transactions, at a FDIC insured trust company, bank, savings bank, savings association, or other financial services entity. It is understood and the parties hereby consent to Escrow Trustee depositing or transferring Escrow Funds into an interest-bearing escrow account, and that any interest earned, or other financial benefits received, on such account(s) shall be retained by Escrow Trustee.

Affected item(s):

ILD0076.doc - Escrow Agreement (Strict Joint Order)

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Escrow Agreement and Release

New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNF Corporate		821046

Added item G. Escrow Trustee will deposit and hold Escrow Funds in an escrow account, together with similar funds from other transactions, at a FDIC insured trust company, bank, savings bank, savings association, or other financial services entity. It is understood and the parties hereby consent to Escrow Trustee depositing or transferring Escrow Funds into an interest-bearing escrow account, and that any interest earned, or other financial benefits received, on such account(s) shall be retained by Escrow Trustee.

Affected item(s):

ILD0082.doc - Escrow Agreement and Release

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Escrow Disbursement Agreement

New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNF Corporate		821039

Added item 5. Please render to view in full.

Affected item(s):

ILD0054.doc - Escrow Disbursement Agreement

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RELEASE NOTES

JUNE 2024

Lender Required Holdback Instructions

New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNF Corporate		821080
<p>Added as last paragraph:</p> <p>Escrow Trustee will deposit and hold Escrow Funds in an escrow account, together with similar funds from other transactions, at a FDIC insured trust company, bank, savings bank, savings association, or other financial services entity. It is understood and the parties hereby consent to Escrow Trustee depositing or transferring Escrow Funds into an interest-bearing escrow account, and that any interest earned, or other financial benefits received, on such account(s) shall be retained by Escrow Trustee.</p> <p>Affected item(s): ILD0065.doc - Lender Required Holdback Instructions</p>			

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TI Agreement

New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNF Corporate		821071
<p>Added the following paragraph, please render to view.</p> <p>Unless directed otherwise, Escrow Trustee will deposit and hold Escrow Funds in an escrow account, together with similar funds from other transactions, at a FDIC insured trust company, bank, savings bank, savings association, or other financial services entity. It is understood and the parties hereby consent to Escrow Trustee depositing or transferring Escrow Funds into an interest-bearing escrow account, and that any interest earned, or other financial benefits received, on such account(s) shall be retained by Escrow Trustee.</p> <p>Affected item(s): ILD0039.doc - TI Agreement</p>			

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Title Indemnity Agreement (Metro)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNF Corporate		821086
<p>Added new language, please render to view placement: Unless otherwise directed, Escrow Trustee will deposit and hold Escrow Funds in an escrow account, together with similar funds from other transactions, at a FDIC insured trust company, bank, savings bank, savings association, or other financial services entity. It is understood and the parties hereby consent to Escrow Trustee depositing or transferring Escrow Funds into an interest-bearing escrow account, and that any interest earned, or other financial benefits received, on such account(s) shall be retained by Escrow Trustee.</p> <p>Affected item(s): ILD0246.doc - Title Indemnity Agreement (Metro)</p>			

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INDIANA

DOCUMENTS

Escrow

<i>Payoff HOA-HELOC Authorization (Last 5 Digits)</i>			
New/Mod Change Request	Requested By FT IN	Incident No.	TFS No. 819403
Added date lines under the signature lines.			
Affected item(s): IND1359.doc - Payoff HOA-HELOC Authorization (Last 5 Digits)			

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<i>Sales Disclosures (3)</i>			
New/Mod Change Request	Requested By FT IN	Incident No. INC240182499	TFS No. 819528
Added prompts for D.3, E.4. and E.5.			
Affected item(s): IND1336.doc - Sales Disclosure (2023) IND1363.doc - Sales Disclosure (Commercial - 2023) IND1369.doc - Sales Disclosure (Mult. Properties - 2023)			

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KENTUCKY

REPORTS

<i>Title Production</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Mid-South Agency Production		820637
Update dropdown to show Stop/Start tasks.			
<u>Affected item(s):</u> SSCORP5143.rpt - Title Production			

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MARYLAND

DOCUMENTS

Escrow

<i>Affidavit (Refinance - Frederick Co)</i>			
New/Mod Change Request	Requested By Liberty Title	Incident No.	TFS No. 819104
Updating to form to match updated form from the county.			
Affected item(s): MDD1008.doc - Affidavit (Refinance - Frederick Co)			

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<i>Deed (Amtrak - Mayor)</i>			
New/Mod New Request	Requested By Property Title & Escrow	Incident No.	TFS No. 818865
New document. Please render to view in full.			
Affected item(s): MDD1149.doc - Deed (Amtrak - Mayor)			

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MICHIGAN

DOCUMENTS

[Escrow](#)

New ABA			
New/Mod New Request	Requested By CT MI	Incident No.	TFS No. 818595
New ABA for JAQD202.			
Affected item(s): MID1231.doc - Master ABA Disclosure			

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MINNESOTA

DOCUMENTS

Escrow

<i>Disbursing Set-Up Sheet</i>			
New/Mod Change Request	Requested By Commercial Partners Title	Incident No. INC240169696	TFS No. 819418
Various updates. Please render to view in full.			
<u>Affected item(s):</u> MND1128.doc - Disbursing Set-Up Sheet			

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MISSOURI

DOCUMENTS

Escrow

<i>Affidavit (Closing Compliance) (MO)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	St. Louis Title	INC240181956	819589
Removed language regarding property fraud alert notice.			
Affected item(s): MOD1203.doc - Affidavit (Closing Compliance) (MO)			

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<i>Affidavit (Evidencing Certificate of Affixation of MH)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	St. Louis Title		819996
Added date to first page.			
Affected item(s): MOD1062.doc - Affidavit (Evidencing Certificate of Affixation of MH)			

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<i>Indemnity Language Added to Forms (30)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	State Counsel		818875
<p>Added indemnity language.</p> <p>Mortgage Registration Fee Affidavit is no longer necessary because Kansas no longer has a mortgage registration tax. This document has been disabled.</p> <p>Affected item(s): MOD1023.doc - Affidavit (No New Improvements) MOD1024.doc - Affidavit (Adverse Possession) MOD1026.doc - Affidavit (Owner) MOD1027.doc - Affidavit (Builder) MOD1028.doc - Affidavit (Builder's Final) MOD1032.doc - Affidavit (Broker - KS) MOD1033.doc - Affidavit (Broker - MO) MOD1034.doc - Affidavit (Amoco Zone C) MOD1035.doc - Affidavit (Child Support) MOD1036.doc - Affidavit (Maintenance) MOD1038.doc - Affidavit (Signature Name) MOD1063.doc - Affidavit (Prior Tenants) MOD1065.doc - Affidavit (Arm's Length Transaction) MOD1071.doc - Affidavit (Decedent's) MOD1072.doc - Affidavit (Marital Status) MOD1083.doc - Affidavit (Heirship) MOD1084.doc - Affidavit (Scrivener's) MOD1086.doc - Affidavit (Peaceful Possession) MOD1088.doc - Affidavit (Mortgage Registration Fee) MOD1105.doc - Affidavit (POA Still in Effect) MOD1144.doc - Affidavit (No Start) MOD1156.doc - Affidavit (Translation) MOD1169.doc - Affidavit (Broker - Buyer) - MO MOD1170.doc - Affidavit (Broker - Seller) - MO MOD1171.doc - Affidavit (Broker - Buyer) - KS MOD1172.doc - Affidavit (Broker - Seller) - KS MOD1174.doc - Affidavit (Non-Production) MOD1192.doc - Affidavit (Commercial Owners) MOD1240.doc - Affidavit (Tenancy By Entireties) MOD1256.doc - Affidavit (Executive Order 24-01)</p>			

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<i>Letter (Seller To OTC - Arch City Title)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	MidWest IT		819410
<p>New document. Please render to view in full.</p> <p>Affected item(s): MOD1261.doc - Letter (Seller To OTC - Arch City Title)</p>			

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<i>Marital Rights Waiver</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	St. Louis Title		815221
<p>Updated to match the most recently provided version.</p> <p>Affected item(s): MOD1123.doc - Marital Rights Waiver</p>			

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<i>New Construction Indemnity</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	St. Louis Title		820005
Added functionality for St. Louis Title to pull the acknowledgment information to the document from the file.			
Affected item(s): MOD1139.doc - New Construction Indemnity			

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<i>Policy-Guarantee Product Enclosure Letter (Title)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	St. Louis Title		819471
Updated to always pull the current user as the signor for St. Louis Title.			
Affected item(s): SSCORPD0272.doc - Policy-Guarantee Product Enclosure Letter (Title)			

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<i>Property Fraud Alerts (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	St. Louis Title		819484
New documents. Please render to view in full.			
Affected item(s): MOD1262.doc - Property Fraud Alert (Benchmark) MOD1263.doc - Property Fraud Alert (Security-Arch)			

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<i>Trid Seller Letter with Coverage</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	St. Louis Title		821174
Updated website instructions for Security Title.			
Affected item(s): MOD1228.doc - Trid Seller Letter with Coverage			

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<i>Utility Authorization (esign)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	St. Louis Title	INC240131264	818868
New document. Please render to view in full.			
Affected item(s): MOD1260.doc - Utility Authorization (esign)			

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MONTANA

DOCUMENTS

Escrow

<i>Letter (Commission Demand) nka Letter (Compensation Demand)</i>			
New/Mod Change Request	Requested By System Admin	Incident No.	TFS No. 818560
Updated title to "Letter (Compensation Demand)".			
Affected item(s): MTD0042.doc - Letter (Compensation Demand)			

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NEW MEXICO

MY SCREENS

<i>All Screens</i>							
New/Mod	Requested By	Incident No.	TFS No.				
Mod	Debi Crosby						
<p>The Expressions have been modified to display the,</p> <ul style="list-style-type: none"> > Buyers > Sellers > Property > Settlement Date <p>These entries are visible when one of the following My Screens is selected:</p> <ul style="list-style-type: none"> > NM All Screens > NM Commercial > NM Commercial CSS > NM Escrow Screens > NM Title Screens <div style="border: 1px solid #ccc; padding: 10px; margin-top: 20px;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px;">Buyers: K B</td> <td style="width: 50%; padding: 5px;">Property: 12 Trinity Ave</td> </tr> <tr> <td style="padding: 5px;">Sellers: G W</td> <td style="padding: 5px;">Settlement Date: 10/19/2023</td> </tr> </table> </div>				Buyers: K B	Property: 12 Trinity Ave	Sellers: G W	Settlement Date: 10/19/2023
Buyers: K B	Property: 12 Trinity Ave						
Sellers: G W	Settlement Date: 10/19/2023						

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REPORTS

<i>Transaction Form</i>			
New/Mod Change Request	Requested By PacNW, NM Escrow Admin	Incident No.	TFS No. 819091
Updated to pull the "Transaction Date" not the "Trust Accounting Date," to pull next to the signature.			
For the whole state of NM, the Transaction Date will auto populate next to the signature.			
Affected item(s): SSCORP5002.rpt - Transaction Form			

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NEVADA

DOCUMENTS

Escrow

<i>Demand - Lien for Spousal or Child Support</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	NV EPUI		819399
Updated signature section to allow "Escrow Assistant" and "Alternate" as options for who is signing the letter.			
Affected item(s): SSCORPD5538.doc - Demand - Lien for Spousal or Child Support			

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<i>Demand - Private</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	NV		818611
Updated language regarding the Beneficiary's Statement and add FedEx language. Please render to view changes.			
Affected item(s): SSCORPD0360.doc - Demand - Private			

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<i>Demand Private with Request for Full Reconveyance</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	NV		818622
Removed DOT section and revised language to item 1. Please render to view all changes.			
Affected item(s): SCA0002726.doc - Demand Private with Request for Full Reconveyance			

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<i>HOA NonActive Disclosure</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	TT Durango Sunset		819495
Language updated, please render to view in full.			
Affected item(s): NVD1263.doc - HOA NonActive Disclosure			

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<i>Substitution of Trustee and Full Reconveyance</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Nevada		818627
Various changes. Please render to view in full.			
Affected item(s): NVD1014.doc - Substitution of Trustee and Full Reconveyance			

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NEW YORK

DOCUMENTS

Escrow

<i>Letter Search</i>			
New/Mod Change Request	Requested By CT NY	Incident No.	TFS No. 819524
Various changes, please render to view in full.			
Affected item(s): NYD1113.doc - Letter Search			

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<i>Limited Liability Search (Buffalo)</i>			
New/Mod Change Request	Requested By CT NY	Incident No.	TFS No. 819521
Various changes, please render to view in full.			
Affected item(s): NYD1211.doc - Limited Liability Search (Buffalo)			

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OHIO

DOCUMENTS

Escrow

<i>ABAs (11)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	CT OH		818640
Updated and new ABAs. Please render to view in full.			
<p>Affected item(s): OHD1460.doc - ACT ABA Cleveland nka ACT ABA OH CT Cleveland OHD1461.doc - ACT ABA Toledo nka ACT ABA OH CT Toledo OHD1462.doc - ACT ABA GMT nka ACT ABA OH GMT OHD1463.doc - ACT ABA Fidelity nka ACT ABA OH Fidelity OHD1466.doc - ACT ABA CT Columbus nka ACT ABA OH CT Columbus OHD1467.doc - ACT ABA CT Cincinnati nka ACT ABA OH CT Southern OHD1469.doc - ACT ABA CT AmeriTitle nka ACT ABA OH AmeriTitle OHD1478.doc - ACT ABA MI GMT OHD1479.doc - ACT ABA MI CT Toledo OHD1480.doc - ACT ABA PA CT Cleveland OHD1481.doc - ACT ABA KY CT Southern</p>			

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<i>DTE 100 - Real Property Conveyance Fee Statements (3)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	OH		818859
Adjusted vertical spacing of document.			
<p>Affected item(s): OHD1441.doc - DTE 100 - Real Property Conveyance Fee Statement OHD1367.doc - DTE 100EX - Statement of Reason for Exemption OHD1459.doc - DTE 100EX - Statement of Reason for Exemption (Cuyahoga County)</p>			

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<i>Outside Document Signing Order Form</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FT OH		818543
Added prompts for appointment date, name of customers and signing address.			
<p>Affected item(s): OHD1477.doc - Outside Document Signing Order Form</p>			

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OKLAHOMA

DOCUMENTS

Escrow

<i>Affidavit (Closing - Purchase)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Smith Brothers Abstract & Title Co.	INC240174463	819452
<p>Added the following language to item 7:</p> <p>Buyer acknowledges the original Deed will be delivered to the physical address listed above. The Owner's Policy will be sent electronically to the email address listed above.</p> <p>Affected item(s): OKD1232.doc - Affidavit (Closing - Purchase)</p>			

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<i>Affidavit (No HOA)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT OK		819431
<p>Added reference to Property Owner's.</p> <p>Affected item(s): OKD1017.doc - Affidavit (No HOA)</p>			

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<i>Affidavit (Utility)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	CT OK		818547
<p>New document. Please render to view in full.</p> <p>Affected item(s): OKD1329.doc - Affidavit (Utility)</p>			

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Recordables

New/Mod Change Request	Requested By State of Oklahoma	Incident No.	TFS No. 818574
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Increased the top margins to at least two (2) inches and all other margins have been increased to one (1) inch.

Affected item(s):

- OKD1001_SL.doc - Special Warranty Deed (Corporation)
- OKD1045.doc - Deed (Quitclaim - Joint Tenants)
- OKD1046.doc - Deed (Warranty - Joint Tenants)
- OKD1047.doc - Deed (Statutory Warranty)
- OKD1054.doc - Deed (Quitclaim)
- OKD1055.doc - Deed (Special Warranty - Joint Tenants)
- OKD1056.doc - Deed (Special Warranty)
- OKD1063.doc - Deed (Special Warranty - HUD HomeTelos)
- OKD1064.doc - Deed (Special Warranty - HUD)
- OKD1240.doc - Deed (Special Warranty - FNMA)
- OKD1304.doc - Deed (Quitclaim - Joint Tenants), Letter
- OKD1305.doc - Deed (Warranty - Joint Tenants), Letter
- OKD1306.doc - Deed (Statutory Warranty), Letter
- OKD1307.doc - Deed (Quitclaim), Letter
- OKD1308.doc - Deed (Special Warranty - Joint Tenants), Letter
- OKD1309.doc - Deed (Special Warranty), Letter
- OKD1310.doc - Deed (Special Warranty - HUD HomeTelos), Letter
- OKD1311.doc - Deed (Special Warranty - HUD), Letter

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REPORTS

<i>Invoice and Consolidated Invoice</i>			
New/Mod Change Request	Requested By AllFirst Admin	Incident No.	TFS No. 818538
Updated for Smith Brothers Abstract to show "Deliver To" from the T3 contact.			
NOTE: If no contact in the T3, still show "Deliver To." If no T3 present in the file, then no "Deliver To" will show.			
Affected item(s): SSCORPD3003.spdoc - Consolidated Invoice SSCORPD5021.spdoc - Invoice SSCORP5385.rpt - HTML Invoices Programming Notes			

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OREGON

DOCUMENTS

Escrow

<i>Declaration (Transfer on Death Deed)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	State Counsel		818558
Various updates made according to counsel's request. Please render to view changes.			
Affected item(s): ORD1494.doc - Declaration (Transfer on Death Deed)			

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<i>Recording Instructions (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	System Admin		818554
Updated document for the Owner's Policy 'Delivery Policy To' section to pull information for all of the codes selected.			
Affected item(s): ORD1470.doc - Instructions (Recording) ORD1037.doc - Instructions (Recording) Legal			

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<i>Verification of Commission</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Western Title		820465
Revised formatting of email address to stack under the Escrow Officer's name.			
Affected item(s): ORD1457.doc - Verification of Commission			

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REPORTS

<i>Out of State Escrow Reporting</i>			
New/Mod New Request	Requested By PacNW IT	Incident No.	TFS No. 788488
New Report Out of State Escrow Reporting.			
Affected item(s): SSCORP5599.rpt - Out of State Escrow Reporting			

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<i>Transaction Form</i>			
New/Mod Change Request	Requested By PacNW, NM Escrow Admin	Incident No.	TFS No. 819091
Updated to pull the "Transaction Date" not the "Trust Accounting Date," to pull next to the signature.			
Affected item(s): SSCORP5002.rpt - Transaction Form			

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TENNESSEE

REPORTS

<i>Title Production</i>			
New/Mod Change Request	Requested By Mid-South Agency Production	Incident No.	TFS No. 820637
Update dropdown to show Stop/Start tasks.			
Affected item(s): SSCORP5143.rpt - Title Production			

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TEXAS

DOCUMENTS

[Escrow](#)

<i>Third Party Deposit Escrow Instructions</i>			
New/Mod Change Request	Requested By Settlement	Incident No.	TFS No. 818602
Updated language for buyer/seller in the signature section.			
Affected item(s): TXFNFESC_ThirdPartyDepositEscrowInstructions.doc - Third Party Deposit Escrow Instructions			

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RELEASE NOTES

JUNE 2024

Title

[PRO FORMA Updates based on Underwriting Bulletin 2024-RC-02](#)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Corporate Counsel		819137

Per Underwriting Bulletin 2024-RC-02, all Loan Policies, Owner's Policies and Endorsements have been updated per the following for Pro forma transactions:

1. The Policy number is no longer to show - only the Pro forma reference in the number field.
2. The President and Secretary signatures are replaced with a Pro forma reference.
3. Proforma references to show for Coverage amount, if operation has elected to also show the amount.

NOTE: Pro forma language in the footer did not change for Texas products.

Affected item(s):

SSTXD00122.doc - All Texas Endorsements
SSTXD00122.doc - All Texas Loan Policy Endorsements
SSTXD00123.doc - Loan Policy Conds and Stips
SSTXD00123.doc - Owner's Policy Conds and Stips
SSTXD00128.doc - Loan Policy Jacket
SSTXD00128.doc - Owner's Policy Jacket
SSTXD00133.doc - Loan Policy Sched A
SSTXD00133.doc - Owner's Policy Sched A
SSTXD00138.doc - Loan Policy Sched B
SSTXD00138.doc - Owner's Policy Sched B
SSTXD00143.doc - Loan Policy Sched B2
SSTXD00143.doc - Owner's Policy Sched B2
SSTXD00148.doc - Loan Policy Sched C
SSTXD00148.doc - Owner's Policy Sched C
SSTXD00153.doc - Loan Policy Sched D
SSTXD00153.doc - Owner's Policy Sched D
SSTXD00182.doc - Master Owner's Policy
SSTXD00183.doc - Master Loan Policy
SSTXD00185.doc - Master Short Form
SSTXD00215.doc - Loan Policy Sched A (T-2R) - 2014 - Escrow
SSTXD00216.doc - Loan Policy Sched B (T-2R) - 2014 - Escrow
SSTXD00217.doc - Loan Policy Addendum (T-2R) - 2014 - Escrow
SSTXD00287.doc - Loan Policy of Title Insurance (T-2) - 2014
SSTXD00288.doc - Owner's Policy of Title Insurance (T-1) - 2014
TXFNFESC_ShortFormResidentialLoanPolicyT-2R (Addendum) Escrow.doc - Short Form Residential Loan Policy T-2R (Addendum) - Escrow
TXFNFESC_ShortFormResidentialLoanPolicyT-2R (ScheduleA) Escrow.doc - Short Form Residential Loan Policy T-2R (Schedule A) - Escrow
TXFNFESC_ShortFormResidentialLoanPolicyT-2R (ScheduleB) Escrow.doc - Short Form Residential Loan Policy T-2R (Schedule B) - Escrow
TXFNFTIFT_LoanPolicyT-2 (LegalDescription).doc - Loan Policy T-2 (Legal Description)
TXFNFTIFT_LoanPolicyT-2 (ScheduleA).doc - Loan Policy T-2 (Schedule A)
TXFNFTIFT_OwnersPolicyT-1 (LegalDescription).doc - Owner's Policy T-1 (Legal Description)
TXFNFTIFT_OwnersPolicyT-1 (ScheduleA).doc - Owner's Policy T-1 (Schedule A)
TXFNFTIFT_ResidentialOwnersPolicyT-1R (LegalDescription).doc - Residential Owner's Policy T-1R (Legal Description)
TXFNFTIFT_ResidentialOwnersPolicyT-1R (ScheduleA).doc - Residential Owner's Policy T-1R (Schedule A)
TXFNFTIFT_ShortFormResidentialLoanPolicyT-2R (Addendum).doc - Short Form Residential Loan Policy T-2R (Addendum)
TXFNFTIFT_ShortFormResidentialLoanPolicyT-2R (ScheduleA).doc - Short Form Residential Loan Policy T-2R (Schedule A)
TXFNFTIFT_ShortFormResidentialLoanPolicyT-2R (ScheduleB).doc - Short Form Residential Loan Policy T-2R (Schedule B)

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REPORTS

Dallas CPF Daily Summary

New/Mod Change Request	Requested By Dallas CPF Admin	Incident No.	TFS No. 819159
Added Liberty to the Brand dropdown.			
Affected item(s): SSCORP5239.rpt - Dallas CPF Daily Summary			

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UTAH

INTEGRATIONS

ValueCheck LinkIt

New/Mod New Request	Requested By	Incident No.	TFS No.
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Installation of ValueCheck LinkIt v1.18.0.0.

Provides users the ability to link requirements, exceptions, and legal descriptions through a single step to documents stored in their corresponding smartview orders.

NOTE: This integration is permission based and may not be enabled for all users.

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WASHINGTON

DOCUMENTS

Escrow

<u>Exhibit Page - Commitment Legal (Signatures)</u>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	TT Spokane		818551
New document. Please render to view in full.			
Affected item(s): WA00001098.doc - Exhibit Page - Commitment Legal (Signatures)			

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<u>Master Real Estate Excise Tax Affidavit (2024) Multi Deed</u>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	System Admin		818549
New document. Please render to view in full.			
Affected item(s): WA00001036.doc - Master Real Estate Excise Tax Affidavit (2024) Multi Deed			

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REPORTS

<i>Opened/Closed Orders</i>			
New/Mod Change Request	Requested By PacNW IT	Incident No.	TFS No. 818902
Added new column 'Marketing Source Contact'. Removed Loan Amount column.			
Affected item(s): SSCORP5231.rpt - Opened/Closed Orders			

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WISCONSIN

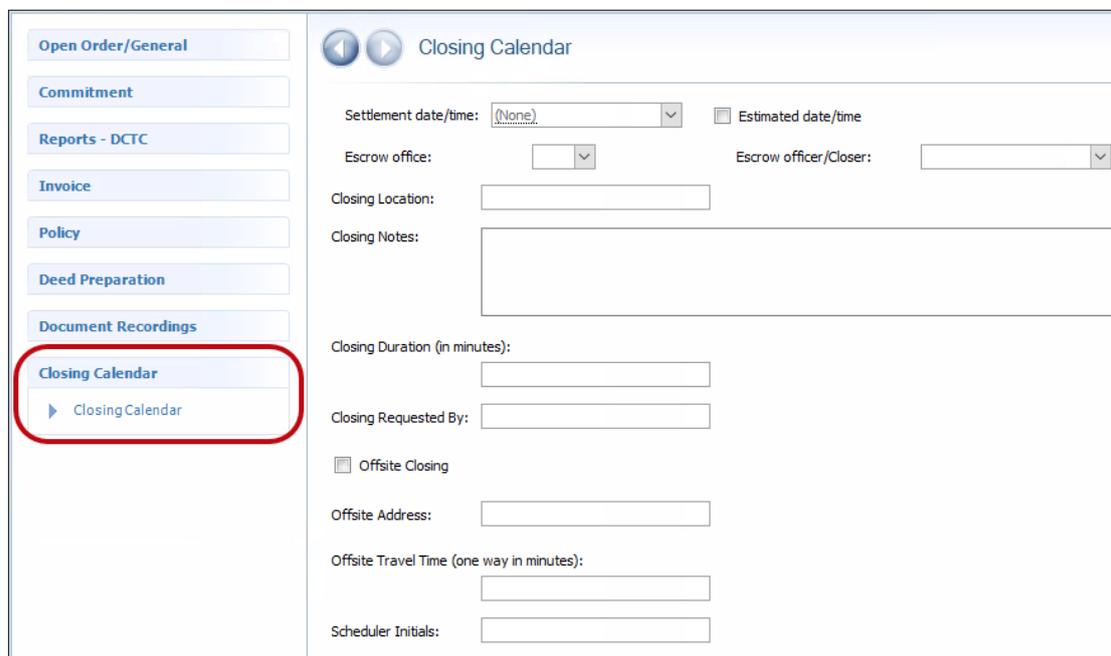
MY SCREENS

Closing Calendar Screen

New/Mod	Requested By	Incident No.	TFS No.
New	Valerie DeBaets	INC240186129	

The **Closing Calendar** section and screen has been added.

This change is visible when the **My Screens > IL-FTWI Title** is selected.



The screenshot displays the 'Closing Calendar' screen. On the left, a sidebar contains several menu items: 'Open Order/General', 'Commitment', 'Reports - DCTC', 'Invoice', 'Policy', 'Deed Preparation', 'Document Recordings', and 'Closing Calendar'. The 'Closing Calendar' item is highlighted with a red circle. Below it is a sub-item 'Closing Calendar' with a right-pointing arrow. The main area of the screen is titled 'Closing Calendar' and contains the following fields:

- Settlement date/time: (None) [dropdown] Estimated date/time
- Escrow office: [dropdown] Escrow officer/Closer: [dropdown]
- Closing Location: [text input]
- Closing Notes: [text area]
- Closing Duration (in minutes): [text input]
- Closing Requested By: [text input]
- Offsite Closing
- Offsite Address: [text input]
- Offsite Travel Time (one way in minutes): [text input]
- Scheduler Initials: [text input]

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COMMERCIAL PARTNERS

MY SCREENS

Various Screens

New/Mod	Requested By	Incident No.	TFS No.
Mod	Allison Mayes	INC240202189	

The following screens have been added in the respective screen section:

- › Open Order/General
 - » **Sales Contract & Earnest Money**
- › Closing
 - » **Sales Contract & Earnest Money**
 - » **Loan Terms & Payments**
- › Document Prep
 - » **Property Derivation**
 - » **Affidavit**
 - » **Existing Liens**
- › Commitment
 - » **Property Derivation**
 - » **Search & Exam**
 - » **Policy Instructions**
 - » **Existing Liens**

These changes are visible when the **My Screens > CP Commercial CSS** screen is selected.

<p>Open Order/General</p> <ul style="list-style-type: none"> Order Entry Order Contacts Property Sales Contract & Earnest Money Policy Selection Title Insurance Premiums Status Order Information 	<p>Closing</p> <ul style="list-style-type: none"> Title Insurance Premiums Endorsements Additional Title Charges Sales Contract & Earnest Money City/Town Taxes Assessments Prorations Loan Information & Funding Loan Terms & Payments CDF Pg1-Closing Intro/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 Delivery & Tracking Escrow Agreement Rent Schedule Order Transactions Order Balance Seller Proceeds & 1099-S Options 	<p>Document Prep</p> <ul style="list-style-type: none"> Deed Notary & Acknowledgment Property Derivation Affidavit Existing Liens <p>Commitment</p> <ul style="list-style-type: none"> Property Title Legal Description Property Derivation Commitment - Schedule A Commitment - Schedules B1, B2 Search & Exam Endorsements Policy Instructions Existing Liens
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FNF COMMERCIAL

DOCUMENTS

Escrow

<i>Escrow Trust Instructions (Strict Joint Order 1 - Earnest Money)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNF Corporate		821082
<p>Revised "DIRECTION NOT TO INVEST/RIGHT TO COMMINGLE" to "RIGHT TO COMMINGLE". Removed first sentence of that paragraph "Except as to deposits of funds for which escrow trustee has received express written direction concerning investment or other handling, the parties hereto direct the escrow trustee NOT to invest any funds deposited by the parties under the terms of this escrow and waive any rights which they may have under Section 2-8 of the Corporate Fiduciary Act (205 ILCS 620/2-8) to receive interest on funds deposited hereunder." Added the following as a new paragraph under the COMMINGLE section: Escrow Trustee will deposit and hold Escrow Funds in an escrow account, together with similar funds from other transactions, at a FDIC insured trust company, bank, savings bank, savings association, or other financial services entity. It is understood and the parties hereby consent to Escrow Trustee depositing or transferring Escrow Funds into an interest-bearing escrow account, and that any interest earned, or other financial benefits received, on such account(s) shall be retained by Escrow Trustee.</p> <p>Affected item(s): COMD1011.doc - Escrow Trust Instructions (Strict Joint Order 1 - Earnest Money)</p>			

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<i>Title Report - Limited Lien</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNT Strategic Market Svcs	INC240158902	819425
<p>Added language referencing files mechanics' liens and tax liens.</p> <p>Affected item(s): COMD1079.doc - Title Report - Limited Lien</p>			

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NCS

DOCUMENTS

Escrow

Bank of America Address Change (9)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT IL	INC240186382	819739
Updated Bank of America to the New York address.			
Affected item(s):			
SSCORPD1807.doc - Wire Information			
SSCORPD5330.doc - Wire Information (International)			
SSCORPD5541.doc - WireSafe Fraud Alert			
SSCORPD5616.doc - WireSafe Fraud Alert (International)			
SSCORPD5627.doc - WireSafe Fraud Alert (eSign)			
SSCORPD5680.doc - WireSafe Fraud Alert (Seller Only)			
SSCORPD5681.doc - WireSafe Fraud Alert (Lender Only)			
SSCORPD5702.doc - WireSafe Fraud Alert (Refi-Borrower)			
SSCORPD5808.doc - WireSafe Fraud Alert (International - esign)			

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NBU kna NCS (4)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT IL NCS		818632
Replaced NBU with NCS.			
Affected item(s):			
COMD1019.doc - Payment Transmittal Form (Branch) - Prompts (Split Sheet)			
COMD1021.doc - Payment Transmittal Form (Agency) - Prompts (Split Sheet)			
COMD1024.doc - Payment Transmittal Form (Branch) (Split Sheet)			
COMD1025.doc - Payment Transmittal Form (Agency) (Split Sheet)			
COMD1156.doc - Product Cover Page			

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INTEGRATIONS

ValueCheck LinkIt

New/Mod New Request	Requested By	Incident No.	TFS No.
<p>Installation of ValueCheck LinkIt v1.18.0.0.</p> <p>Provides users the ability to link requirements, exceptions, and legal descriptions through a single step to documents stored in their corresponding smartview orders.</p> <p>NOTE: This integration is permission based and may not be enabled for all users.</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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