

# SOFTPRO SELECT

July 2024

RELEASE NOTES



**Testing Release Date: July 5, 2024**

Production Release Date: July 15, 2024



TABLE OF CONTENTS

ALL STATES/SITES..... 7

DOCUMENTS..... 7

    Escrow ..... 7

*Release of Funds Prior to Close* ..... 7

INTEGRATIONS ..... 8

*Rate Validation Tool*..... 8

REPORTS ..... 9

*Escrow Trial Balance (with IBA Balances)* ..... 9

*Order Log* ..... 9

*Orders by Settlement Date*..... 9

*Transaction Activity*..... 9

ALABAMA ..... 10

    INTEGRATIONS ..... 10

*SafeAudit (Lakehouse)* ..... 10

*SoftPro Select Commercial (CSS) Import Tool*..... 10

CALIFORNIA..... 11

DOCUMENTS..... 11

    Escrow ..... 11

*Affidavit (Death of Trustee) with PCOR*..... 11

*Affidavit (Non-Term Power of Attorney POA)* ..... 11

*City Report Request - Ventura* ..... 11

*Disbursement of Proceeds-Refunds* ..... 11

*Instruction to Transfer of Withholding Funds to Third Party nka Instruction to Transfer Withholding Funds to Third Party*..... 11

*Letter (Equifax)* ..... 12

*Letter (Escheat-Due Diligence) No Checks Issued*..... 12

*New Docs for DSG (13)* ..... 12

*Transfer Tax on Deeds for CSS orders* ..... 12

    INTEGRATIONS ..... 13

*Rate Validation Tool*..... 13

    REPORTS ..... 15

*Data Download* ..... 15

COLORADO..... 16

DOCUMENTS..... 16

    Escrow ..... 16



## RELEASE NOTES

JULY 2024

<i>Affidavit (Final Bills Paid)</i> .....	16
<i>Payoff Request</i> .....	16
<i>TC Release</i> .....	16
<i>Title Report</i> .....	16
CONNECTICUT .....	17
INTEGRATIONS .....	17
<i>SafeAudit (Lakehouse)</i> .....	17
<i>SoftPro Select Commercial (CSS) Import Tool</i> .....	17
FLORIDA.....	18
DOCUMENTS.....	18
Title .....	18
<i>ALTA 9.3-06 - Restrictions, Encroachments, Minerals (with Florida Modifications) 2020</i> .....	18
<i>Construction Loan Update Endorsement</i> .....	18
INTEGRATIONS .....	19
<i>smartview Order Synch</i> .....	19
HAWAII .....	20
DOCUMENTS.....	20
Escrow .....	20
<i>Letter (Opening - Buyer - Seller)</i> .....	20
<i>Letter (Prelim Report to Buyer-Buyer Agent)</i> .....	20
<i>Letter (Prelim Report to Seller-Seller Agent)</i> .....	20
<i>Letter (RPT Closing)</i> .....	20
IDAHO.....	21
DOCUMENTS.....	21
Escrow .....	21
<i>Homeowner Exemption - Ada County</i> .....	21
INTEGRATIONS .....	22
<i>smartview Accounting Forms</i> .....	22
INDIANA.....	23
DOCUMENTS.....	23
Escrow .....	23
<i>Waiver Mortgage Exemption</i> .....	23
KENTUCKY.....	24
INTEGRATIONS .....	24
<i>Rate Services Tool</i> .....	24
MAINE.....	25



**RELEASE NOTES**

**JULY 2024**

INTEGRATIONS ..... 25

*SafeAudit (Lakehouse)* ..... 25

*SoftPro Select Commercial (CSS) Import Tool*..... 25

MARYLAND ..... 26

    DOCUMENTS..... 26

        Escrow ..... 26

*Report of Title* ..... 26

    INTEGRATIONS ..... 27

*SafeAudit (Lakehouse)* ..... 27

*SoftPro Select Commercial (CSS) Import Tool*..... 27

MASSACHUSETTS..... 28

    INTEGRATIONS ..... 28

*SafeAudit (Lakehouse)* ..... 28

*SoftPro Select Commercial (CSS) Import Tool*..... 28

MICHIGAN ..... 29

    DOCUMENTS..... 29

        Escrow ..... 29

        ABAs..... 29

MONTANA ..... 30

    DOCUMENTS..... 30

        Escrow ..... 30

*Deed (Warranty) (2)* ..... 30

    INTEGRATIONS ..... 31

*smartview Accounting Forms* ..... 31

NEW JERSEY ..... 32

    DOCUMENTS..... 32

        Escrow ..... 32

*Seller's Residency Certification-Exemption* ..... 32

NEVADA ..... 33

    DOCUMENTS..... 33

        Escrow ..... 33

*Bill of Sale*..... 33

*EI - Refresh and Refurbish*..... 33

*Letter (HOA Closing)*..... 33

*Washoe County Notice of Exemption*..... 33

    Title ..... 34

*CLTA Preliminary Report Form 2023 (NV)* ..... 34



**RELEASE NOTES**

**JULY 2024**

*CLTA Preliminary Report Form 2023 (NV) (Reno)* ..... 34

*ALTA Commitment 2021 (NV)* ..... 34

NEW YORK..... 35

DOCUMENTS..... 35

Escrow ..... 35

*Letter Search* ..... 35

NORTH CAROLINA ..... 36

INTEGRATIONS ..... 36

*SafeAudit (Lakehouse)* ..... 36

*SoftPro Select Commercial (CSS) Import Tool*..... 36

OHIO ..... 37

DOCUMENTS..... 37

Escrow ..... 37

*Deed Margins (21)* ..... 37

*DTE 100 - Real Property Conveyance Fee Statement* ..... 37

*Property Exemption Form (Cuyahoga)*..... 37

*Tax Certification* ..... 38

OKLAHOMA ..... 39

DOCUMENTS..... 39

Escrow ..... 39

*After Closing Gap* ..... 39

*HOA Request*..... 39

OREGON ..... 40

DOCUMENTS..... 40

Escrow ..... 40

*Customer Agreement (Non-Insured Products and Services)*..... 40

*Partial Reconveyance* ..... 40

*Title Plant Records Report* ..... 40

PENNSYLVANIA ..... 41

INTEGRATIONS ..... 41

*SafeAudit (Lakehouse)* ..... 41

*SoftPro Select Commercial (CSS) Import Tool*..... 41

SOUTH CAROLINA..... 42

DOCUMENTS..... 42

Escrow ..... 42

*Real Estate Withholding I-290*..... 42

*Seller's Affidavit (Withholding I-295)*..... 42



**RELEASE NOTES**

**JULY 2024**

INTEGRATIONS ..... 43

*SafeAudit (Lakehouse)* ..... 43

*SoftPro Select Commercial (CSS) Import Tool*..... 43

TEXAS ..... 44

    REPORTS ..... 44

*Statistical Report*..... 44

WASHINGTON..... 45

    DOCUMENTS..... 45

        Escrow ..... 45

*Master Real Estate Excise Tax Affidavit (6)* ..... 45

    INTEGRATIONS ..... 46

*Rate Services Tool*..... 46

WISCONSIN..... 47

    DOCUMENTS..... 47

        Escrow ..... 47

*Wire Information (2)* ..... 47

    INTEGRATIONS ..... 48

*Rate Services Tool*..... 48

LIBERTY TITLE..... 49

    DOCUMENTS..... 49

        Escrow ..... 49

*Closing Confirmation (IL)* ..... 49

NCS ..... 50

    DOCUMENTS..... 50

        Escrow ..... 50

*Report of Title* ..... 50

    MY SCREENS ..... 51

*Property Screen*..... 51

ServiceLink..... 52

    DOCUMENTS..... 52

        Escrow ..... 52

*Earnest Money and Purchase Agreement Receipt*..... 52

        Title ..... 53

*Commitment to Issue Mortgage Modification and Date Down (SE390-06)* ..... 53

*Mortgage Modification and Date Down (SE391-06)* ..... 53

TECHNICAL NOTES (FOR LOCAL IT/SUPPORT) ..... 54



## RELEASE NOTES

JULY 2024

### ALL STATES/SITES

#### DOCUMENTS

##### Escrow

###### *Release of Funds Prior to Close*

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Ticor Title NV		823560
Corrected typo of "fund" to "funds" in the last paragraph.			
<b>Affected item(s):</b> SSCORPD2038.doc - Release of Funds Prior to Close SSCORPD2038.doc - EI Release of Funds Prior to Close			

[Back to Table of Contents](#)



INTEGRATIONS

*Rate Validation Tool*

New/Mod Mod	Requested By	Incident No.	TFS No.
<p>RESOLVED: When a County name contains a hyphen (i.e., Miami-Dade), the County name was not being sent in the request.</p> <p>RESOLVED: Read-only orders in a re-verification state being presented with pop-up to Re-Verify Rates with a splunk error created if <b>Yes</b> was selected from the pop-up.</p>			

[Back to Table of Contents](#)



REPORTS

<a href="#"><i>Escrow Trial Balance (with IBA Balances)</i></a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> DSG Admin	<b>Incident No.</b>	<b>TFS No.</b> 822497
Removed the column for flash codes as it corrupts DSG's templates for Excel spreadsheets.			
<b>Affected item(s):</b> SSCORP5025.rpt - Escrow Trial Balance (with IBA Balances)			

[Back to Table of Contents](#)

<a href="#"><i>Order Log</i></a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> DSG Admin	<b>Incident No.</b>	<b>TFS No.</b> 819841
Updated parameters:			
1. Added checkbox parameter "Include sales reps on marketing source only" (default - unchecked). When checked the report will show Sales Reps indicated on Marketing Source contacts, only.			
2. Added Trust Account picklist			
<b>Affected item(s):</b> SSCORP5091.rpt - Order Log			

[Back to Table of Contents](#)

<a href="#"><i>Orders by Settlement Date</i></a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> NCS HOU Admin	<b>Incident No.</b>	<b>TFS No.</b> 821245
Added a column and updated another for the HOU-NCS version.			
<b>Affected item(s):</b> SSCORP5288.rpt - Orders by Settlement Date			

[Back to Table of Contents](#)

<a href="#"><i>Transaction Activity</i></a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> PacNW IT	<b>Incident No.</b>	<b>TFS No.</b> 821928
Updated to show Payor Code when Receipt Activity is selected.			
<b>Affected item(s):</b> SSCORP0018.rpt - Transaction Activity			

[Back to Table of Contents](#)



ALABAMA

INTEGRATIONS

<i>SafeAudit (Lakehouse)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
<p>Installation of SAFe Audit v1.5.1.0.</p> <p>This integration sends data from the Select order, along with ProTrust transactions, ledger and trust account data to Lakehouse. It can then be used as a data warehouse by Fidelity to help detect fraudulent data.</p>			

[Back to Table of Contents](#)

<i>SoftPro Select Commercial (CSS) Import Tool</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
<p>Installation of Commercial (CSS) Import Tool v1.18.0.0.</p> <p>This integration enables the creation of new orders for each row in a Microsoft Excel workbook. The Tool uses Lookup Tables beginning with the name "CSS Import Mapping" as the mapping table between the Excel workbook and Select Order fields..</p>			

[Back to Table of Contents](#)



CALIFORNIA

DOCUMENTS

Escrow

<i>Affidavit (Death of Trustee) with PCOR</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	NoCal EPU Bay		823556
Corrected to ensure the grantee's name is populating for all scenarios.			
<b>Affected item(s):</b> SCA0002647.doc - Affidavit (Death of Trustee) with PCOR SCA0002827.doc - Affidavit (Death of Trustee) Generic SCA0002828.doc - Affidavit (Death of Trustee) Generic with PCOR			

[Back to Table of Contents](#)

<i>Affidavit (Non-Term Power of Attorney POA)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNT Sacramento	INC240195646	823587
Update document to also function for Trust contacts.			
<b>Affected item(s):</b> SCA0000023.doc - Affidavit (Non-Term Power of Attorney POA)			

[Back to Table of Contents](#)

<i>City Report Request - Ventura</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT SoCal		822257
Updated to most recent version.			
<b>Affected item(s):</b> SCA0002483.doc - City Report Request - Ventura			

[Back to Table of Contents](#)

<i>Disbursement of Proceeds-Refunds</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Santa Clara		823569
Reversed the June change: For CT Santa Clara a custom field was added for Account Name, if left blank then a line will pull to the form.			
<b>Affected item(s):</b> SCA0000096.doc - Disbursement of Proceeds-Refunds			

[Back to Table of Contents](#)

<i>Instruction to Transfer of Withholding Funds to Third Party nka Instruction to Transfer Withholding Funds to Third Party</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT SoCal	INC240233489	823258
Removed "OF" from title.			
<b>Affected item(s):</b> SSCORPD5499.doc - Instruction to Transfer Withholding Funds to Third Party			

[Back to Table of Contents](#)

<i>Letter (Equifax)</i>			
<b>New/Mod</b> New Request	<b>Requested By</b> FNTG Santa Barbara	<b>Incident No.</b>	<b>TFS No.</b> 823571
New document. Please render to view in full.			
<b>Affected item(s):</b> SCA0003187.doc - Letter (Equifax Consumer Offering)			

[Back to Table of Contents](#)

<i>Letter (Escheat-Due Diligence) No Checks Issued</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> Dynamic Solutions Group	<b>Incident No.</b>	<b>TFS No.</b> 823695
Updated to most recently provided version approved by Settlement.			
<b>Affected item(s):</b> SCA0002359.doc - Letter (Escheat-Due Diligence) No Checks Issued			

[Back to Table of Contents](#)

<i>New Docs for DSG (13)</i>			
<b>New/Mod</b> New Request	<b>Requested By</b> Dynamic Solutions Group	<b>Incident No.</b>	<b>TFS No.</b> 823776
New document. Please render to view.			
<b>Affected item(s):</b> SSCORPD5946.doc - Letter (Release Funds Valid Hold) SSCORPD5947.doc - Letter (DSG Resign) SSCORPD5948.doc - Letter (EMD or Funds Held) SSCORPD5949.doc - Mutual Instructions to Release Funds SSCORPD5950.doc - Letter (Resign - Successful Transfer EMD) SSCORPD5951.doc - Letter (DSG Interplead Notice) SSCORPD5952.doc - Letter (DSG Status - Purchase) SSCORPD5953.doc - Letter (DSG Status - Holdback) SSCORPD5954.doc - Letter (Resign- Decline to Insure) SSCORPD5955.doc - Letter (10 Day Demand) SSCORPD5956.doc - Letter (DSG EMD Release - 120 Day Notice) CO Only SSCORPD5957.doc - Letter (DSG General Enclosures) SSCORPD5958.doc - DSG Review Sheet			

[Back to Table of Contents](#)

<i>Transfer Tax on Deeds for CSS orders</i>																																																				
<b>New/Mod</b> Change Request	<b>Requested By</b> CT NCS CA	<b>Incident No.</b>	<b>TFS No.</b> 823984																																																	
For CSS orders only: The Transfer Tax reflection on the Deeds has been updated so that when there are multiple transfer taxes, users are able to select the amount to use for the subject Deed instead of seeing all Transfer Tax amounts totaled together.																																																				
<table border="1"> <thead> <tr> <th colspan="6">Recording Charges</th> <th>\$26,625.00</th> <th>\$0.00</th> <th>\$525.00</th> </tr> <tr> <th>Description</th> <th>Re</th> <th>To</th> <th>Name</th> <th>C/D</th> <th>Buyer Debit</th> <th>Buyer Credit</th> <th>Seller Debit</th> </tr> </thead> <tbody> <tr> <td>01 County Transfer Tax</td> <td></td> <td>G</td> <td>Recorder's Office</td> <td><input type="checkbox"/></td> <td>\$3,300.00</td> <td></td> <td></td> </tr> <tr> <td>02 State Tax</td> <td></td> <td>G</td> <td>Recorder's Office</td> <td><input type="checkbox"/></td> <td>\$22,500.00</td> <td></td> <td></td> </tr> <tr> <td>03 Doc Fee</td> <td></td> <td>G</td> <td>Recorder's Office</td> <td><input type="checkbox"/></td> <td></td> <td></td> <td>\$350.00</td> </tr> <tr> <td>04 Another County Transfer Tax</td> <td></td> <td>G</td> <td>Recorder's Office</td> <td><input type="checkbox"/></td> <td></td> <td></td> <td>\$100.00</td> </tr> </tbody> </table> <p>A reference to a single CSS Line was encountered, but more than one was found. Please choose from the qualifying CSS Lines below.</p> <p><input checked="" type="radio"/> REC.01 - County Transfer Tax  <input type="radio"/> REC.04 - Another County Transfer Tax</p> <p>The undersigned grantor(s) declare(s)</p> <p><input type="checkbox"/> This transfer is exempt from the documentary transfer tax.  <input checked="" type="checkbox"/> The documentary transfer tax is \$3,300.00 and is computed on:</p>				Recording Charges						\$26,625.00	\$0.00	\$525.00	Description	Re	To	Name	C/D	Buyer Debit	Buyer Credit	Seller Debit	01 County Transfer Tax		G	Recorder's Office	<input type="checkbox"/>	\$3,300.00			02 State Tax		G	Recorder's Office	<input type="checkbox"/>	\$22,500.00			03 Doc Fee		G	Recorder's Office	<input type="checkbox"/>			\$350.00	04 Another County Transfer Tax		G	Recorder's Office	<input type="checkbox"/>			\$100.00
Recording Charges						\$26,625.00	\$0.00	\$525.00																																												
Description	Re	To	Name	C/D	Buyer Debit	Buyer Credit	Seller Debit																																													
01 County Transfer Tax		G	Recorder's Office	<input type="checkbox"/>	\$3,300.00																																															
02 State Tax		G	Recorder's Office	<input type="checkbox"/>	\$22,500.00																																															
03 Doc Fee		G	Recorder's Office	<input type="checkbox"/>			\$350.00																																													
04 Another County Transfer Tax		G	Recorder's Office	<input type="checkbox"/>			\$100.00																																													

[Back to Table of Contents](#)

*Rate Validation Tool*

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

- Support added for the following Military-eligible Policy Codes:

Owner's only		Loan only	
CAXT-01-MD Res Standard Owners		CAXT-07-MD Loan Only Sale Rate	
CAXT-03-MD Res Ext Owners		CAXT-07-MD Loan Only Extended Sale Rate	
CAXT-02-MD Res Homeowners Policy			
<b>Simultaneous</b>			
CAXT-00-MD Res HomOwn & Ext Loan		CAXT-04-MD Res HomOwn & Std Loan	
CAXT-00-MD Res HomOwn & MD Ext Loan		CAXT-04-MD Res HomOwn & MD Std Loan	
CAXT-00-Res HomOwn & MD Ext Loan		CAXT-04-Res HomOwn & MD Std Loan	
CAXT-01-MD Res Std Own & Std Loan		CAXT-07-MD Res Ext Own & Std Loan	
CAXT-01-MD Res Std Own & MD Std Loan		CAXT-07-MD Res Ext Own & MD Std Loan	
CAXT-01-Res Std Own & MD Std Loan		CAXT-07-Res Ext Own & MD Std Loan	
CAXT-02-MD Res Std Own & Ext Loan		CAXT-08-MD Res Ext Own & Ext Loan	
CAXT-02-MD Res Std Own & MD Ext Loan		CAXT-08-MD Res Ext Own & MD Ext Loan	
CAXT-02-Res Std Own & MD Ext Loan		CAXT-08-Res Ext Own & MD Ext Loan	

**NOTE:** The 'MD' cited in the Policy Code indicates which Policy the Military Discount is being applied. These Policy Codes control the Rate Summary View value of the product accordingly.

**Example:** If Policy Code **CAXT-00-Res HomOwn & MD Ext Loan** is selected, the following Rate Summary View is shown:

**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

Does the Owner's policy qualify for the Military Discount?  Yes  No

Does the Loan policy(ies) qualify for the Military Discount?  Yes  No

- Full Escrow with Loan Construction product has been adjusted.

**Full Escrow With Loan Construction**

Commercial Loan Escrow Services (Construction)  Yes  No

Additional Charges? "If additional charges are to be made, they will be based on the costs incurred and additional responsibilities assumed by the Company, and must be agreed to by the customer in writing. In writing includes customer's approval of settlement statement."

This product requires:

- » **Yes** response to **Will any of the Loan policies in the transaction be used to insure a construction loan?** question

*Rate Validation Tool*

**NOTE:** Selecting Policy Codes CAXX-01C-Res Std Construction and **CAXX-02C-Res Ext Construction** present a **Yes** response.

- » Amounts of Loan 1-5 to be provided in the request

Is this operation expressly authorized by the Company's management to offer Centralized Processing Unit Escrow Services to qualifying customers?  Yes  No

Will any of the Loan policies in this transaction be used to insure a construction loan?  Yes  No

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

How many loans are involved in the transaction?

Amount of Loan 1

- » The number of loans and their amounts populate from the Select order. If additional non-insured loans are to be considered, the number of loans and the amounts can be adjusted/entered manually.

Will any of the Loan policies in this transaction be used to insure a construction loan?  Yes  No

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

How many loans are involved in the transaction?

Amount of Loan 1

Amount of Loan 2

Amount of Loan 3

Amount of Loan 4

Amount of Loan 5

[Back to Table of Contents](#)



REPORTS

<i>Data Download</i>			
<b>New/Mod</b> Troubleshooting	<b>Requested By</b> Sho Niizuma	<b>Incident No.</b>	<b>TFS No.</b> 822822
Changed logic to include marketing reps for foreign contacts.			
<b>Affected item(s):</b> SSCORP5577.rpt - Data Download			

[Back to Table of Contents](#)



COLORADO

DOCUMENTS

Escrow

<i>Affidavit (Final Bills Paid)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Heritage Title Company		823565
Revised to change "Original Contractor" to "General Contractor" and removed references to the owner signing the document.			
<b>Affected item(s):</b> COD1059.doc - Affidavit (Final Bills Paid)			

[Back to Table of Contents](#)

<i>Payoff Request</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Heritage Title		822692
Updating form to enable Other "O" contacts to be used in addition to Payoff Lender contacts.			
<b>Affected item(s):</b> COD1262.doc - Payoff Request			

[Back to Table of Contents](#)

<i>TC Release</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Heritage Title		821930
Added Andy Mollock to dropdown option.			
<b>Affected item(s):</b> COD1130.doc - TC Release			

[Back to Table of Contents](#)

<i>Title Report</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT CO		822002
Revised to be able to pull multiple properties to one form.			
<b>Affected item(s):</b> COD1100.doc - Title Report			

[Back to Table of Contents](#)



CONNECTICUT

INTEGRATIONS

<i>SafeAudit (Lakehouse)</i>			
<b>New/Mod</b>	<b>Requested By</b>	<b>Incident No.</b>	<b>TFS No.</b>
New			
<p>Installation of SAFe Audit v1.5.1.0.</p> <p>This integration sends data from the Select order, along with ProTrust transactions, ledger and trust account data to Lakehouse. It can then be used as a data warehouse by Fidelity to help detect fraudulent data.</p>			

[Back to Table of Contents](#)

<i>SoftPro Select Commercial (CSS) Import Tool</i>			
<b>New/Mod</b>	<b>Requested By</b>	<b>Incident No.</b>	<b>TFS No.</b>
New			
<p>Installation of Commercial (CSS) Import Tool v1.18.0.0.</p> <p>This integration enables the creation of new orders for each row in a Microsoft Excel workbook. The Tool uses Lookup Tables beginning with the name "CSS Import Mapping" as the mapping table between the Excel workbook and Select Order fields..</p>			

[Back to Table of Contents](#)



FLORIDA

DOCUMENTS

Title

<a href="#"><i>ALTA 9.3-06 - Restrictions, Encroachments, Minerals (with Florida Modifications) 2020</i></a>			
<b>New/Mod</b> New Request	<b>Requested By</b> Form Filing	<b>Incident No.</b>	<b>TFS No.</b> 821392
As per Form Filing, the ALTA 9.3-06 endorsement has been refiled with Florida Modifications (w-FL Mod 11-2-20).			

[Back to Table of Contents](#)

<a href="#"><i>Construction Loan Update Endorsement</i></a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> Bayshore Title	<b>Incident No.</b>	<b>TFS No.</b> 822987
Updated to pull in the Issued date instead of the Effective Date for this endorsement only.			
<b><u>Affected item(s):</u></b> SSCORPD0792.doc - All Commitment Endorsements SSCORPD0894.doc - All Mgmt Endorsements			

[Back to Table of Contents](#)



INTEGRATIONS

*smartview Order Synch*

New/Mod Mod	Requested By	Incident No.	TFS No.
<p>This release includes:</p> <ul style="list-style-type: none"><li>When a Fidelity operation has been configured to not have a new smartview order created when the ProForm Order's Owing Profile has been revised, the ProForm Order remains linked to the existing smartview order, if one exists.</li></ul> <p>If a smartview Order does not exist when the Owing Profile is updated, a new smartview order is created in the Office ID of the revised Owing Profile.</p> <p><b>NOTE:</b> If the user is not assigned, in smartview to the Office ID of the revised Owing Profile, they will not be able to publish documents to that smartview order.</p> <ul style="list-style-type: none"><li>When a Fidelity operation has been configured to not have a new smartview order created when the ProForm Order's Owing Profile is revised, a Note is created in the smartview order each time it is revised..</li></ul>			

[Back to Table of Contents](#)



HAWAII

DOCUMENTS

Escrow

<a href="#"><i>Letter (Opening - Buyer - Seller)</i></a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> FT HI	<b>Incident No.</b>	<b>TFS No.</b> 821905
Removed reference to Preliminary Title Reports.			
<b>Affected item(s):</b> HID1025.doc - Letter (Opening - Buyer - Seller)			

[Back to Table of Contents](#)

<a href="#"><i>Letter (Prelim Report to Buyer-Buyer Agent)</i></a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> TG HI	<b>Incident No.</b>	<b>TFS No.</b> 821725
Various changes. Please render to view in full.			
<b>Affected item(s):</b> HID1189.doc - Letter (Prelim Report to Buyer-Buyer Agent)			

[Back to Table of Contents](#)

<a href="#"><i>Letter (Prelim Report to Seller-Seller Agent)</i></a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> TG HI	<b>Incident No.</b>	<b>TFS No.</b> 821727
Various updates. Please render to view.			
<b>Affected item(s):</b> HID1188.doc - Letter (Prelim Report to Seller-Seller Agent)			

[Back to Table of Contents](#)

<a href="#"><i>Letter (RPT Closing)</i></a>			
<b>New/Mod</b> New Request	<b>Requested By</b> FT HI	<b>Incident No.</b>	<b>TFS No.</b> 821901
New document. Please render to view in full.			
<b>Affected item(s):</b> HID1445.doc - Letter (RPT Closing)			

[Back to Table of Contents](#)



IDAHO

DOCUMENTS

[Escrow](#)

<a href="#"><i>Homeowner Exemption - Ada County</i></a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> System Admin	<b>Incident No.</b>	<b>TFS No.</b> 821874
Updated to most recent version which removed the 2nd page.			
<b>Affected item(s):</b> IDD1038.doc - Homeowner Exemption - Ada County			

[Back to Table of Contents](#)



INTEGRATIONS

*smartview Accounting Forms*

<b>New/Mod</b>	<b>Requested By</b>	<b>Incident No.</b>	<b>TFS No.</b>
New			
<p>Installation of Accounting Forms v1.5.1.0.</p> <p>This integration allows for the automatic publication of transaction forms and reports when a transaction is posted or adjusted or the order status is changed to Closed or Completed.</p>			

[Back to Table of Contents](#)



INDIANA

DOCUMENTS

Escrow

<i>Waiver Mortgage Exemption</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FT IN		822306
Removed 'Mortgage' from the sentence, "we do not authorize FNTC to file the Mortgage and Homestead Exemptions" to now read, "we do not authorize FNTC to file the Homestead Exemption."			
<b>Affected item(s):</b> IND1031.doc - Waiver Mortgage Exemption			

[Back to Table of Contents](#)

KENTUCKY

INTEGRATIONS

*Rate Services Tool*

New/Mod	Requested By	Incident No.	TFS No.
Mod			
<p>This release includes:</p> <ul style="list-style-type: none"> <li>Sales Tax Support – The Municipal and County Sales Tax for the Closing Protection Letter product is now captured in the Order Note and the Rate Summary Response (when applicable), if requesting Local Premium Tax and a Closing Protection Letter product.</li> </ul>			
<div style="border: 1px solid gray; padding: 5px;"> <p><b>General</b></p> <p>Do you want to apply Local Premium taxes to this transaction? (Select No for tax-exempt entities.) <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>Buyer/Borrower Closing Protection Letter requested <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>Lender Closing Protection Letter requested <input checked="" type="radio"/> Yes <input type="radio"/> No</p> </div>			
<div style="border: 1px solid gray; padding: 5px;"> <p><b>Edit Note</b></p> <p>Order KYPrem Tax</p> <p># Of Endorsements: 0</p> <p>RS SCREEN DATA Section: MISC Description: Closing Protection Letter Coverage (Amount returned from Rate Services): \$100.00</p> <p>Closing Protection Letter Municipal Sales Tax (Amount returned from Rate Services): \$8.00</p> <p>Closing Protection Letter County Sales Tax (Amount returned from Rate Services): \$0.00</p> </div>		<div style="border: 1px solid gray; padding: 5px;"> <p><b>Edit Note</b></p> <p>Order KYPrem Tax</p> <p># Of Endorsements: 0</p> <p>RS SCREEN DATA Section: MISC Description: Closing Protection Letter Coverage (Amount returned from Rate Services): \$100.00</p> <p>Closing Protection Letter Municipal Sales Tax (Amount returned from Rate Services): \$0.00</p> <p>Closing Protection Letter County Sales Tax (Amount returned from Rate Services): \$4.00</p> </div>	
<p><b>Rate Summary Responses</b></p> <p>Rate Summary Responses:</p> <p>Closing Protection Letter Coverage (Amount returned from Rate Services): \$100.00</p> <p>Closing Protection Letter Municipal Sales Tax (Amount returned from Rate Services): \$8.00</p> <p>Closing Protection Letter County Sales Tax (Amount returned from Rate Services): \$0.00</p>			
<p><b>Rate Summary Responses</b></p> <p>Rate Summary Responses:</p> <p>Closing Protection Letter Coverage (Amount returned from Rate Services): \$100.00</p> <p>Closing Protection Letter Municipal Sales Tax (Amount returned from Rate Services): \$0.00</p> <p>Closing Protection Letter County Sales Tax (Amount returned from Rate Services): \$4.00</p>			

[Back to Table of Contents](#)



MAINE

INTEGRATIONS

<i>SafeAudit (Lakehouse)</i>			
<b>New/Mod</b>	<b>Requested By</b>	<b>Incident No.</b>	<b>TFS No.</b>
New			
<p>Installation of SAFe Audit v1.5.1.0.</p> <p>This integration sends data from the Select order, along with ProTrust transactions, ledger and trust account data to Lakehouse. It can then be used as a data warehouse by Fidelity to help detect fraudulent data.</p>			

[Back to Table of Contents](#)

<i>SoftPro Select Commercial (CSS) Import Tool</i>			
<b>New/Mod</b>	<b>Requested By</b>	<b>Incident No.</b>	<b>TFS No.</b>
New			
<p>Installation of Commercial (CSS) Import Tool v1.18.0.0.</p> <p>This integration enables the creation of new orders for each row in a Microsoft Excel workbook. The Tool uses Lookup Tables beginning with the name "CSS Import Mapping" as the mapping table between the Excel workbook and Select Order fields..</p>			

[Back to Table of Contents](#)



MARYLAND

DOCUMENTS

[Escrow](#)

<a href="#">Report of Title</a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> NCS Baltimore	<b>Incident No.</b>	<b>TFS No.</b> 821992
Added signature to the line.			
<b>Affected item(s):</b> MDD1045.doc - Report of Title			

[Back to Table of Contents](#)



INTEGRATIONS

*SafeAudit (Lakehouse)*

New/Mod	Requested By	Incident No.	TFS No.
New			
<p>Installation of SAFe Audit v1.5.1.0.</p> <p>This integration sends data from the Select order, along with ProTrust transactions, ledger and trust account data to Lakehouse. It can then be used as a data warehouse by Fidelity to help detect fraudulent data.</p>			

[Back to Table of Contents](#)

*SoftPro Select Commercial (CSS) Import Tool*

New/Mod	Requested By	Incident No.	TFS No.
New			
<p>Installation of Commercial (CSS) Import Tool v1.18.0.0.</p> <p>This integration enables the creation of new orders for each row in a Microsoft Excel workbook. The Tool uses Lookup Tables beginning with the name "CSS Import Mapping" as the mapping table between the Excel workbook and Select Order fields..</p>			

[Back to Table of Contents](#)



MASSACHUSETTS

INTEGRATIONS

<i>SafeAudit (Lakehouse)</i>			
<b>New/Mod</b>	<b>Requested By</b>	<b>Incident No.</b>	<b>TFS No.</b>
New			
<p>Installation of SAFe Audit v1.5.1.0.</p> <p>This integration sends data from the Select order, along with ProTrust transactions, ledger and trust account data to Lakehouse. It can then be used as a data warehouse by Fidelity to help detect fraudulent data.</p>			

[Back to Table of Contents](#)

<i>SoftPro Select Commercial (CSS) Import Tool</i>			
<b>New/Mod</b>	<b>Requested By</b>	<b>Incident No.</b>	<b>TFS No.</b>
New			
<p>Installation of Commercial (CSS) Import Tool v1.18.0.0.</p> <p>This integration enables the creation of new orders for each row in a Microsoft Excel workbook. The Tool uses Lookup Tables beginning with the name "CSS Import Mapping" as the mapping table between the Excel workbook and Select Order fields..</p>			

[Back to Table of Contents](#)



MICHIGAN

DOCUMENTS

Escrow

<a href="#">ABAs</a>			
<b>New/Mod</b> New Request	<b>Requested By</b> CT MI	<b>Incident No.</b>	<b>TFS No.</b> 821878
New ABAs.			

[Back to Table of Contents](#)



MONTANA

DOCUMENTS

Escrow

<a href="#"><i>Deed (Warranty) (2)</i></a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> CT MT	<b>Incident No.</b>	<b>TFS No.</b> 823138
Removed vertical line from top of first page.			
<b>Affected item(s):</b> MTD0005.doc - Deed (Warranty) Legal MTD0217.doc - Deed (Warranty)			

[Back to Table of Contents](#)



INTEGRATIONS

*smartview Accounting Forms*

<b>New/Mod</b>	<b>Requested By</b>	<b>Incident No.</b>	<b>TFS No.</b>
New			
<p>Installation of Accounting Forms v1.5.1.0.</p> <p>This integration allows for the automatic publication of transaction forms and reports when a transaction is posted or adjusted or the order status is changed to Closed or Completed.</p>			

[Back to Table of Contents](#)



NEW JERSEY

DOCUMENTS

Escrow

<i><a href="#">Seller's Residency Certification-Exemption</a></i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> NV NCS	<b>Incident No.</b>	<b>TFS No.</b> 821594
Form updated to match the current state version from 11-23.			
<b>Affected item(s):</b> NJD1009.doc - Seller's Residency Certification-Exemption			

[Back to Table of Contents](#)

NEVADA

DOCUMENTS

Escrow

<a href="#"><i>Bill of Sale</i></a>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Escrow Admin		821907
Added prompt to include Exhibit A language. Please render to view.			
<b>Affected item(s):</b> NVD1015.doc - Bill of Sale			

[Back to Table of Contents](#)

<a href="#"><i>EI - Refresh and Refurbish</i></a>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	Ticor Title Reno		822295
New document. Please render to view in full.			
<b>Affected item(s):</b> NVD1461.doc - EI - Refresh and Refurbish			

[Back to Table of Contents](#)

<a href="#"><i>Letter (HOA Closing)</i></a>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Ticor Title, Nevada	INC240215471	821912
Added Buyer/Borrower, Seller and Property information to the RE section for Nevada users.			
<b>Affected item(s):</b> SSCORPD1350.doc - Letter (HOA Closing)			

[Back to Table of Contents](#)

<a href="#"><i>Washoe County Notice of Exemption</i></a>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	TT Reno		823795
Updated to most recent version provided.			
<b>Affected item(s):</b> NVD1217.doc - Washoe County Notice of Exemption			

[Back to Table of Contents](#)

Title

<i>CLTA Preliminary Report Form 2023 (NV)</i> <i>CLTA Preliminary Report Form 2023 (NV) (Reno)</i>			
<b>New/Mod</b> New Request	<b>Requested By</b> NV State Counsel	<b>Incident No.</b>	<b>TFS No.</b> 821732
The Revised 2023 version of the CLTA Preliminary Report Form (w-NV Mod) is now available, as per Form Filing requested by state counsel.			
<b>Affected item(s):</b> NVD1451.doc - CLTA Preliminary Report Form 2023 (NV) NVD1452.doc - CLTA Preliminary Report Form 2023 (NV) Reno			

[Back to Table of Contents](#)

<i>ALTA Commitment 2021 (NV)</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> Ticor Reno	<b>Incident No.</b>	<b>TFS No.</b> 821999
<b>For Ticor Reno operation only</b> - Removed the "Standard" reference from the Policy description on Schedule A that shows for NV operations.			
<div style="border: 1px solid black; padding: 10px; margin: 10px auto; width: 80%;"> <p>2. Policy to be issued:</p> <p>(a) <b>ALTA Owner's Policy 2021</b></p> <p style="padding-left: 20px;">Proposed Insured: <b>Bob A. Buyer and Brenda C. Buyer</b></p> <p style="padding-left: 20px;">Proposed Policy Amount: <b>\$488,500.00</b></p> </div>			
<b>Affected item(s):</b> NVD1289.doc - ALTA Commitment 2021 (NV) NVD1020.doc - ALTA Commitment 2016 (NV)			

[Back to Table of Contents](#)



NEW YORK

DOCUMENTS

Escrow

<a href="#">Letter Search</a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> Buffalo	<b>Incident No.</b>	<b>TFS No.</b> 823218
Added "TOTAL COST".			
<b>Affected item(s):</b> NYD1113.doc - Letter Search			

[Back to Table of Contents](#)



NORTH CAROLINA

INTEGRATIONS

<a href="#">SafeAudit (Lakehouse)</a>			
New/Mod	Requested By	Incident No.	TFS No.
New			
<p>Installation of SAFe Audit v1.5.1.0.</p> <p>This integration sends data from the Select order, along with ProTrust transactions, ledger and trust account data to Lakehouse. It can then be used as a data warehouse by Fidelity to help detect fraudulent data.</p>			

[Back to Table of Contents](#)

<a href="#">SoftPro Select Commercial (CSS) Import Tool</a>			
New/Mod	Requested By	Incident No.	TFS No.
New			
<p>Installation of Commercial (CSS) Import Tool v1.18.0.0.</p> <p>This integration enables the creation of new orders for each row in a Microsoft Excel workbook. The Tool uses Lookup Tables beginning with the name "CSS Import Mapping" as the mapping table between the Excel workbook and Select Order fields..</p>			

[Back to Table of Contents](#)



OHIO

DOCUMENTS

Escrow

<u>Deed Margins (21)</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	OH		821944
Updated margins to 1.5" on the sides to ensure it is within the 1" requirement.			
<b>Affected item(s):</b>			
OHD1023.doc - Deed (Consent by Heirs)			
OHD1024.doc - Deed (Executor)			
OHD1025.doc - Deed (Fiduciary by Trustee)			
OHD1026.doc - Deed (Fiduciary) - AT			
OHD1027.doc - Deed (General Warranty Corporation) - AT			
OHD1028.doc - Deed (General Warranty Partnership)			
OHD1029.doc - Deed (General Warranty LLC) - AT			
OHD1030.doc - Deed (General Warranty) - AT			
OHD1031.doc - Deed (HUD Limited Warranty)			
OHD1033.doc - Deed (Fiduciary Land Sale)			
OHD1034.doc - Deed (Limited Warranty)			
OHD1035.doc - Deed (Quitclaim)			
OHD1036.doc - Deed (Survivorship) - AT			
OHD1310.doc - Deed (General Warranty - Kentucky)			
OHD1311.doc - Deed (Quitclaim - Kentucky)			
OHD1349.doc - Deed (General Warranty)			
OHD1354.doc - Deed (General Warranty LLC)			
OHD1355.doc - Deed (General Warranty Corporation)			
OHD1356.doc - Deed (Land Contract Release)			
OHD1357.doc - Deed (Survivorship)			
OHD1358.doc - Deed (Fiduciary)			

[Back to Table of Contents](#)

<u>DTE 100 - Real Property Conveyance Fee Statement</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT OH		821910
Added prompt to include buyers current address for FNOX profiles.			
<b>Affected item(s):</b>			
OHD1441.doc - DTE 100 - Real Property Conveyance Fee Statement			

[Back to Table of Contents](#)

<u>Property Exemption Form (Cuyahoga)</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT OH	INC240233635	823224
Updated to only pull buyer/borrower contacts and to add a prompt for the number of units.			
<b>Affected item(s):</b>			
OHD1475.doc - Property Exemption Form (Cuyahoga)			

[Back to Table of Contents](#)



## RELEASE NOTES

JULY 2024

<i>Tax Certification</i>			
<b>New/Mod</b>	<b>Requested By</b>	<b>Incident No.</b>	<b>TFS No.</b>
Change Request	CTOH-North		821895
Added prompt for Special Assessment.			
<b><u>Affected item(s):</u></b> OHD1372.doc - Tax Certification			

[Back to Table of Contents](#)



OKLAHOMA

DOCUMENTS

Escrow

<i>After Closing Gap</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> CT OK	<b>Incident No.</b> INC240219742	<b>TFS No.</b> 821989
Revised from using as "invoice" to using for title purposes.			
<b>Affected item(s):</b> OKD1180.doc - After Closing Gap			

[Back to Table of Contents](#)

<i>HOA Request</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> AllFirst	<b>Incident No.</b> INC240211959	<b>TFS No.</b> 821714
Added buyer names and closing date to the RE section.			
<b>Affected item(s):</b> SSCORPD1344.doc - HOA Request			

[Back to Table of Contents](#)



OREGON

DOCUMENTS

Escrow

<i>Customer Agreement (Non-Insured Products and Services)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	FT Salem		822259
New document. Please render to view in full.			
<b>Affected item(s):</b> ORD1531.doc - Customer Agreement (Non-Insured Products and Services)			

[Back to Table of Contents](#)

<i>Partial Reconveyance</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	State Counsel		821876
Updated the language to match what counsel provided. Please render to view in full.			
<b>Affected item(s):</b> ORD1252.doc - Partial Reconveyance			

[Back to Table of Contents](#)

<i>Title Plant Records Report</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	System Admin		821975
Updated to look to the requirements under GENERAL LIENS to pull items to the General Index Liens against Named Party section. Also, updated to look to the requirements under RECORDINGS to pull items to the Recorded Documents section. If nothing is entered in the requirements, then these sections will continue to prompt the user as it did before.			
<b>Affected item(s):</b> ORD1298.doc - Title Plant Records Report			

[Back to Table of Contents](#)



PENNSYLVANIA

INTEGRATIONS

<a href="#">SafeAudit (Lakehouse)</a>			
New/Mod	Requested By	Incident No.	TFS No.
New			
<p>Installation of SAFe Audit v1.5.1.0.</p> <p>This integration sends data from the Select order, along with ProTrust transactions, ledger and trust account data to Lakehouse. It can then be used as a data warehouse by Fidelity to help detect fraudulent data.</p>			

[Back to Table of Contents](#)

<a href="#">SoftPro Select Commercial (CSS) Import Tool</a>			
New/Mod	Requested By	Incident No.	TFS No.
New			
<p>Installation of Commercial (CSS) Import Tool v1.18.0.0.</p> <p>This integration enables the creation of new orders for each row in a Microsoft Excel workbook. The Tool uses Lookup Tables beginning with the name "CSS Import Mapping" as the mapping table between the Excel workbook and Select Order fields..</p>			

[Back to Table of Contents](#)



SOUTH CAROLINA

DOCUMENTS

Escrow

<i>Real Estate Withholding I-290</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> FNT Las Vegas NCS	<b>Incident No.</b>	<b>TFS No.</b> 822253
Updated form to match the State's 7/17/2023 version.			
<b>Affected item(s):</b> SCD1071.doc - Real Estate Withholding I-290			

[Back to Table of Contents](#)

<i>Seller's Affidavit (Withholding I-295)</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> FNT Las Vegas NCS	<b>Incident No.</b>	<b>TFS No.</b> 822255
Updated form to match the State's 6/28/22 version.			
<b>Affected item(s):</b> SCD1030.doc - Seller's Affidavit (Withholding I-295)			

[Back to Table of Contents](#)



INTEGRATIONS

*SafeAudit (Lakehouse)*

New/Mod	Requested By	Incident No.	TFS No.
New			
<p>Installation of SAFe Audit v1.5.1.0.</p> <p>This integration sends data from the Select order, along with ProTrust transactions, ledger and trust account data to Lakehouse. It can then be used as a data warehouse by Fidelity to help detect fraudulent data.</p>			

[Back to Table of Contents](#)

*SoftPro Select Commercial (CSS) Import Tool*

New/Mod	Requested By	Incident No.	TFS No.
New			
<p>Installation of Commercial (CSS) Import Tool v1.18.0.0.</p> <p>This integration enables the creation of new orders for each row in a Microsoft Excel workbook. The Tool uses Lookup Tables beginning with the name "CSS Import Mapping" as the mapping table between the Excel workbook and Select Order fields..</p>			

[Back to Table of Contents](#)



TEXAS

REPORTS

<i>Statistical Report</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> Glen Betty - FNTG TX	<b>Incident No.</b>	<b>TFS No.</b> 822697
For profiles 'Default\P\TX\Allegiance' and 'Default\T\AllFirst' and their child profiles only.			
Endorsements will be displayed based on Policy Issued Date when Date Type parameter = 'Policy Issued Date' and Policy Effective Date when Date Type parameter = 'Policy Effective Date'.			
<b>Affected item(s):</b> SSCORP5272.rpt - Statistical Report			

[Back to Table of Contents](#)



WASHINGTON

DOCUMENTS

Escrow

<a href="#">Master Real Estate Excise Tax Affidavit (6)</a>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	WA DOR		821966
Updated to most recent version from the website.			
<b>Affected item(s):</b> WA00000306.doc - MH Real Estate Excise Tax Affidavit WA00001036.doc - Master Real Estate Excise Tax Affidavit (2024) Multi Deed WA00001088.doc - Master Real Estate Excise Tax Affidavit (2024) WA00001089.doc - Master Real Estate Excise Tax Affidavit (2024) Multiple Location WA00001090.doc - Master Real Estate Excise Tax Affidavit - Exempt (2024) WA00001091.doc - Master Real Estate Excise Tax Affidavit (2024) Multiple Affidavits			

[Back to Table of Contents](#)

INTEGRATIONS

*Rate Services Tool*

New/Mod Mod	Requested By	Incident No.	TFS No.
<ul style="list-style-type: none"> <li>Escrow Armed Forces Discount question now only shows in new files in the Rate Summary View when eligible. Currently an eligible discount for Ticor Title Company in Spokane County.           <div data-bbox="301 517 1366 862" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p><b>Products</b></p> <p><b>Full Escrow With Loan</b></p> <p>Residential Loan Escrow Services (including refinance) <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>Enter negotiated fee: <input type="text"/></p> <p><b>Is this transaction eligible for the United States Armed Forces Discount (Active Duty, Veteran, National Guard)?</b> <input type="radio"/> Yes <input checked="" type="radio"/> No</p> </div> </li> <li>Sales Tax           <p>RESOLVED: Error identified when a Title &amp; Escrow order is requesting Sales Tax</p> <ul style="list-style-type: none"> <li>» Title &amp; Escrow orders now use the Settlement Agent's address for the taxing jurisdiction.</li> <li>» Title only orders continue to use the Title Company's address for the taxing jurisdiction.</li> <li>» Responses can be viewed via the Audit View tab, Order Notes and the Rate Summary Response section.</li> </ul> </li> </ul>			

[Back to Table of Contents](#)



WISCONSIN

DOCUMENTS

[Escrow](#)

<a href="#">Wire Information (2)</a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> Dane County	<b>Incident No.</b>	<b>TFS No.</b> 823762
Updated to look to the escrow office and bank information from the trust account for FDLC profiles.			
<b>Affected item(s):</b> SSCORPD1807.doc - Wire Information SSCORPD5330.doc - Wire Information (International)			

[Back to Table of Contents](#)

INTEGRATIONS

Rate Services Tool

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

- Endorsement Support
  - Multiple **ALTA 33-06 Disbursement Endorsements** in the Select order to be priced as one, not individually.  
This change also changes the Rate Summary questions and response from Rate Services.

- » The **Comparison View** shows the responding rate from Rate Services against the first Endorsement entry for the ALTA 33-06 and the number of draws. Any charges on other ALTA 33-06 endorsement are not compared or changed in the Select order.

Policy Type	Policy Code	Description	Coverage Amount	# Of Endorsements	
▶ Loan 1	WICT-22-Comm...	Chicago Title-W...	\$950,000.00	1	
	Code	Description	SoftPro Endorsement Cost	RS Endorsement Cost	Matched
▶	ALTA 33-06	ALTA 33-06 - ...	\$1,200.00	\$1,200.00	Yes

If the user wishes to spread the charge against the other entries, the charges can be manually updated on the Endorsement screen. By doing so, awakens the utility to Re-Verify Rates. If the only change was to spread the total charge on the Endorsement screen, select Rates Verified on the Comparison View tab and select/enter a Justification and Submit.

[Back to Table of Contents](#)



LIBERTY TITLE

DOCUMENTS

Escrow

<a href="#"><i>Closing Confirmation (IL)</i></a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> Liberty Title & Escrow Company	<b>Incident No.</b>	<b>TFS No.</b> 823705
Updated document to remove certain closing locations and add new ones. Please render to view in full.			
<b><u>Affected item(s):</u></b> LIBD1124.doc - Closing Confirmation (IL)			

[Back to Table of Contents](#)



NCS

DOCUMENTS

[Escrow](#)

<a href="#">Report of Title</a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> NCS Baltimore	<b>Incident No.</b>	<b>TFS No.</b> 821992
Added signature to the line.			
<b>Affected item(s):</b> MDD1045.doc - Report of Title			

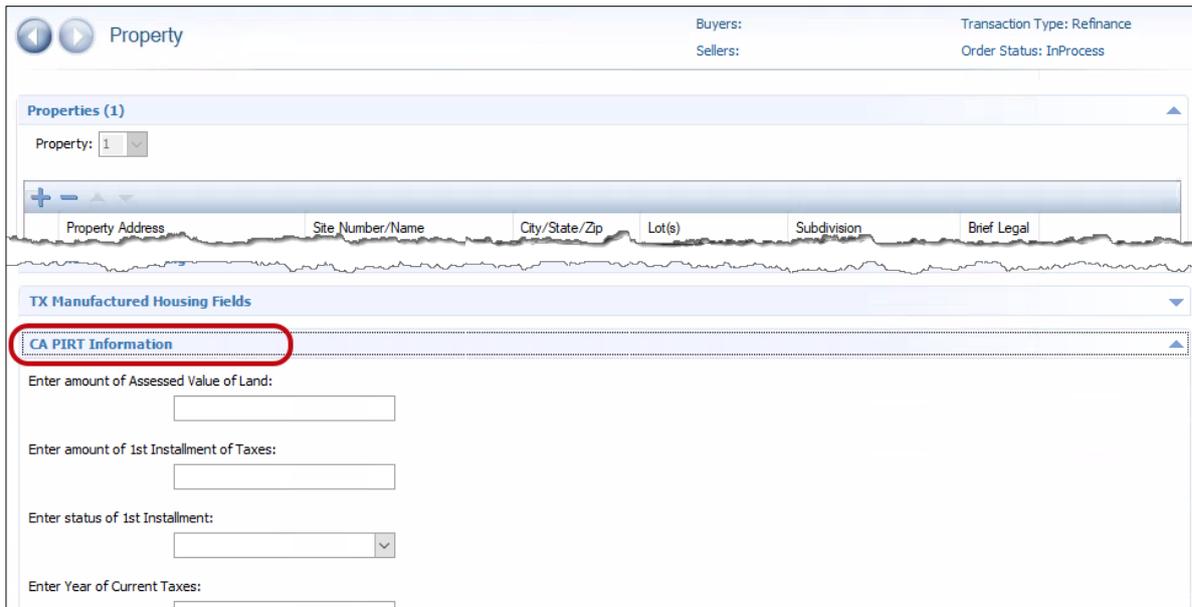
[Back to Table of Contents](#)

MY SCREENS

*Property Screen*

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

The **Express Order Entry** screen has been modified to include the **CA PIRT Information** section. This change is visible when the **My Screens > NCS Screens User Group** screen is selected.



The screenshot shows the 'Property' screen interface. At the top, there are navigation arrows and the title 'Property'. On the right side, there are labels for 'Buyers:', 'Sellers:', 'Transaction Type: Refinance', and 'Order Status: InProcess'. Below this is a 'Properties (1)' section with a dropdown menu set to '1'. A table header is visible with columns: 'Property Address', 'Site Number/Name', 'City/State/Zip', 'Lot(s)', 'Subdivision', and 'Brief Legal'. Below the table is a section titled 'TX Manufactured Housing Fields'. The 'CA PIRT Information' section is highlighted with a red circle and contains the following fields:

- Enter amount of Assessed Value of Land:
- Enter amount of 1st Installment of Taxes:
- Enter status of 1st Installment:
- Enter Year of Current Taxes:

[Back to Table of Contents](#)



ServiceLink

DOCUMENTS

Escrow

<a href="#"><i>Earnest Money and Purchase Agreement Receipt</i></a>			
<b>New/Mod</b> New Request	<b>Requested By</b> ServiceLink	<b>Incident No.</b>	<b>TFS No.</b> 822275
New document. Please render to view in full.			
<b>Affected item(s):</b> SLD1105.doc - Earnest Money and Purchase Agreement Receipt			

[Back to Table of Contents](#)



## RELEASE NOTES

JULY 2024

### Title

<a href="#"><i>Commitment to Issue Mortgage Modification and Date Down (SE390-06)</i></a>			
<b>New/Mod</b> New Request	<b>Requested By</b> WI State Counsel	<b>Incident No.</b>	<b>TFS No.</b> 821914
Form updated throughout, per State Counsel.			

[Back to Table of Contents](#)

<a href="#"><i>Mortgage Modification and Date Down (SE391-06)</i></a>			
<b>New/Mod</b> New Request	<b>Requested By</b> WI State Counsel	<b>Incident No.</b>	<b>TFS No.</b> 821917
Form updated throughout, per State Counsel.			

[Back to Table of Contents](#)



**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.

[Back to Table of Contents](#)