SOFTPRO SELECT

July 2024

RELEASE NOTES

Testing Release Date: July 5, 2024

Production Release Date: July 15, 2024

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ALL STATES/SITES

DOCUMENTS

Escrow

Commission Clarification-Disbursement Instructions			
New/Mod Change Request	**Requested By** Settlement	**Incident No.**	**TFS No.** 824950
Updated to show brokerage type in the title. **Affected item(s):** SSCORPD5537.doc - Commission Clarification-Disbursement Instructions			

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EI - Post Closing Refunds			
New/Mod New Request	**Requested By** FT Portland	**Incident No.**	**TFS No.** 824910
New document. Please render to view in full. **Affected item(s):** SSCORPD5959.doc - EI - Post Closing Refunds			

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New Docs for DSG (13)			
New/Mod New Request	**Requested By** Dynamic Solutions Group	**Incident No.**	**TFS No.** 823776
New documents. Please render to view in full. **Affected item(s):** 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			

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Privacy Notice Update			
New/Mod Change Request	**Requested By** FNF Corporate	**Incident No.**	**TFS No.** 824333
Updated to reflect the most recently provided version. Please render to view in full. **Affected item(s):** SSCORPD0911.doc - Privacy Statement SSCORPD5580.doc - Master Commitment with Privacy Notice			

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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.

Affected item(s):
SSCORPD2038.doc - Release of Funds Prior to Close
SSCORPD2038.doc - EI Release of Funds Prior to Close

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Rate Validation Tool			
New/Mod Mod	**Requested By**	**Incident No.**	**TFS No.**

RESOLVED: When a County name contains a hyphen (i.e., Miami-Dade), the County name was not being sent in the request.

RESOLVED: Read-only orders in a re-verification state being presented with pop-up to Re-Verify Rates with a splunk error created if **Yes** was selected from the pop-up.

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REPORTS

Commitment/Policy Status (AllFirst)			
New/Mod Change Request	**Requested By** AllFirst OK Admin	**Incident No.**	**TFS No.** 819668
Added Flash Code picklist. **Affected item(s):** SSCORP5600.rpt - Commitment/Policy Status (AllFirst)			

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

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Master Statement (CSS)			
New/Mod Fix	**Requested By** Config	**Incident No.**	**TFS No.** 822586
Corrected spelling for 3rd party POC from Title. **Affected item(s):** SSCORPD3006.spdoc - Master Statement (CSS)			

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Month by Month Production Summary			
New/Mod Change Request	**Requested By** Mid-South Agency and FT IL	**Incident No.**	**TFS No.** 822499
Added Marketing Source option to Groups 1 and 2, and NONE to Group 2. **Affected item(s):** SSCORP5472.rpt - Month by Month Production Summary			

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Order Log			
New/Mod Change Request	**Requested By** DSG Admin / IL IT	**Incident No.**	**TFS No.** 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 **Affected item(s):** SSCORP5091.rpt - Order Log			

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Order Tasks by Order Date

New/Mod	Requested By	Incident No.	TFS No.
Change Request	AllFirst OK Admin		819664

Added Flash Code picklist.

Affected item(s):
SSCORP5475.rpt - Order Tasks by Order Date

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Order Tasks by Task Dates

New/Mod	Requested By	Incident No.	TFS No.
Change Request	AllFirst OK Admin		819666

Added Flash Code picklist.

Affected item(s):
SSCORP5474.rpt - Order Tasks by Task Date

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Orders by Settlement Date

New/Mod	Requested By	Incident No.	TFS No.
Change Request	NCS HOU Admin		821245

Added a column and updated another for the HOU-NCS version.

Affected item(s):
SSCORP5288.rpt - Orders by Settlement Date

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Re-Opened Cancellations

New/Mod	Requested By	Incident No.	TFS No.
New Request	PacNW IT		822588

New custom Report for re-opened files, after cancellation or closing of other files.

Please Note: Although this report can be used by anyone, this is a custom report for the Pacific Northwest Operations, (WA, OR, ID, MT and HI). Update requests to this report will need to be approved by PacNW IT.

Affected item(s):
SSCORP5604.rpt - Re-Opened Cancellations

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Settlement Statements

New/Mod	Requested By	Incident No.	TFS No.
Change Request	UG and LT SoCal		822554

Updated to remove the transfer tax from the description column For LT SoCal and to suppress the word "Optional" when the asterisk logic is used and from showing on Individual Settlement Statements.

Affected item(s):
SSCORPD5460.rpt - Individual Settlement Statement, Legal (CDF)
SSCORPD5461.rpt - Individual Settlement Statement, Letter (CDF)
SSCORPD5454.spdoc - Settlement Statements

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Single Ledger Balance Report

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Reports Team		819810

Updated to show the new Transaction Note added in the register, per transaction and added Programming Notes.

Affected item(s):
SSCORP5119.rpt - Single Ledger Balance Report

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Top Customer List

New/Mod	Requested By	Incident No.	TFS No.
Troubleshooting	Reports		821863

Corrected grouping issue on summary for empty fields.

Affected item(s):
SSCORP5397.rpt - Top Customer List

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Transaction Activity

New/Mod	Requested By	Incident No.	TFS No.
Change Request	PacNW IT		821928

Updated to show Payor Code when Receipt Activity is selected.

Affected item(s):
SSCORP0018.rpt - Transaction Activity

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Transaction Form - UG #OUG0548

New/Mod	Requested By	Incident No.	TFS No.
Change Request	SpUG		804256

Updated to show "Verified in Person" instead of the phone number, as it grays out when the box is checked.

*PLEASE NOTE: This will be available with version 4.3.69

Affected item(s):
SSCORP5002.rpt - Transaction Form

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ALABAMA

INTEGRATIONS

SafeAudit (Lakehouse)

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

Installation of SAFe Audit v1.5.1.0.

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.

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SoftPro Select Commercial (CSS) Import Tool

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

Installation of Commercial (CSS) Import Tool v1.18.0.0.

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..

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ALASKA

DOCUMENTS

Title

Alaska's Litigation/Trustee's Sale/Contract Forfeiture Guarantee			
New/Mod New Request	**Requested By** Novare	**Incident No.**	**TFS No.** 824569
New document. Please render to view in full.			

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ARIZONA

REPORTS

Transaction Form

New/Mod	Requested By	Incident No.	TFS No.
Change Request	LT AZ Admin		820914

Updated as Follows:

Lawyers Title/Grand Canyon Title: Ledger Transfers going to EMD will look like Receipts for EMD.

Affected item(s):
SSCORP5002.rpt - Transaction Form

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CALIFORNIA

DOCUMENTS

Escrow

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

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

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

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Disbursement of Proceeds-Refunds			
New/Mod Change Request	**Requested By** CT Santa Clara	**Incident No.**	**TFS No.** 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. **Affected item(s):** SCA0000096.doc - Disbursement of Proceeds-Refunds			

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

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Letter (Equifax)

New/Mod	Requested By	Incident No.	TFS No.
New Request	FNTG Santa Barbara		823571

New document. Please render to view in full.

Affected item(s):
SCA0003187.doc - Letter (Equifax Consumer Offering)

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Letter (Escheat-Due Diligence) No Checks Issued

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Dynamic Solutions Group		823695

Updated to most recently provided version approved by Settlement.

Affected item(s):
SCA0002359.doc - Letter (Escheat-Due Diligence) No Checks Issued

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MH Tax Clearance Request Form (Humboldt)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Humboldt County	INC240246256	824944

Updated to reflect the most recent version from the County website. Please render to view.

Affected item(s):
SCA0002894.doc - MH Tax Clearance Request Form (Humboldt)

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Recording and Policy Instructions (w/ Notes)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Alameda		823151

Updated to also look to the people grid for the email.

Affected item(s):
SCA0001021.doc - Recording and Policy Instructions (w/ Notes)

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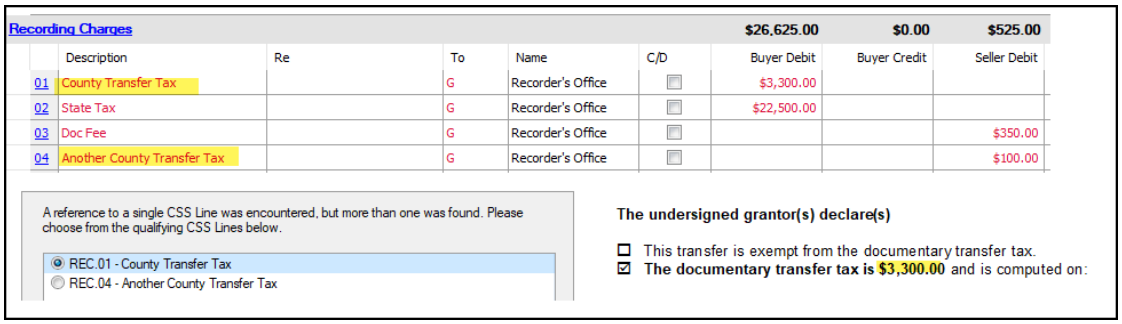
Transfer Tax on Deeds for CSS orders

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



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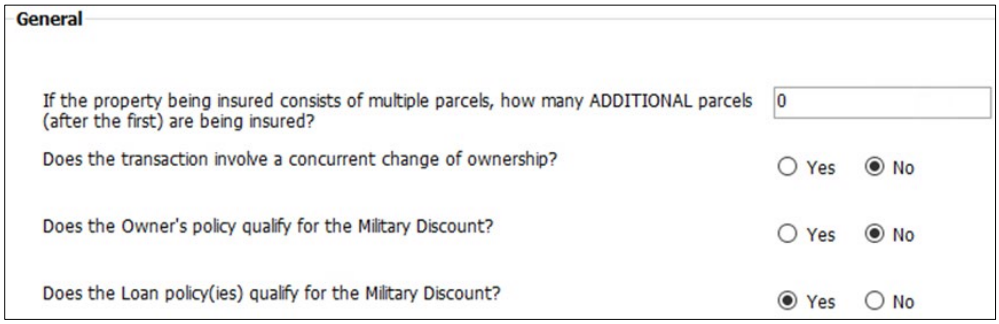
Rate Validation Tool

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

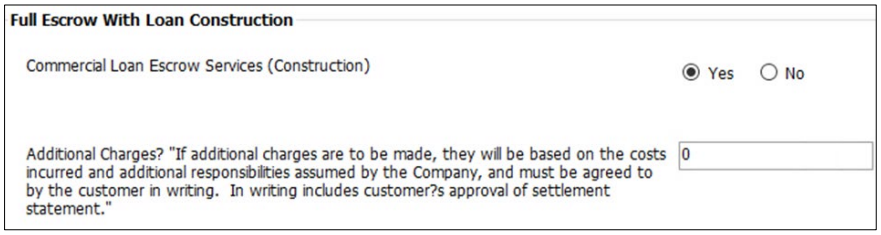
- Support added for the following Military-eligible Policy Codes:

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	
Simultaneous	
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:



- Full Escrow with Loan Construction product has been adjusted.

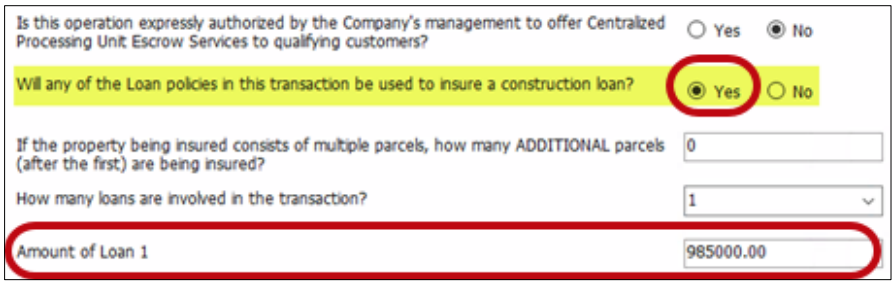


This product requires:
  - » **Yes** response to **Will any of the Loan policies in the transaction be used to insure a construction loan?** question

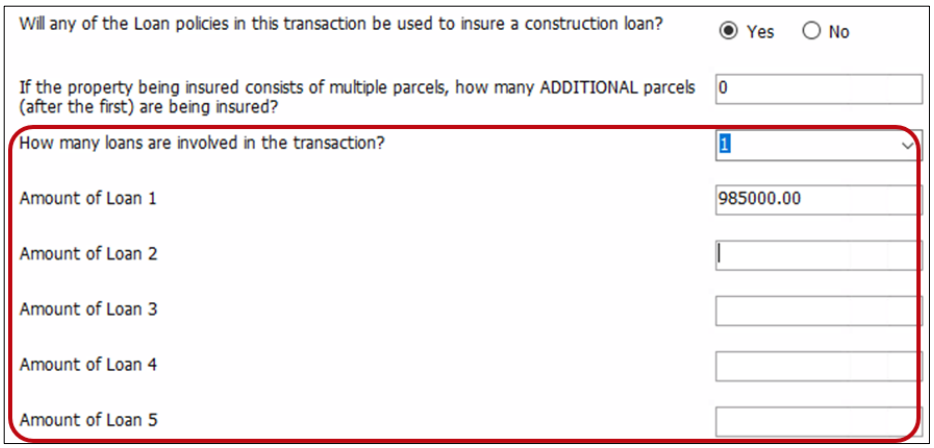
Rate Validation Tool

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



» 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.



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REPORTS

Commissions by Escrow Officer (FNT LA)			
New/Mod Change Request	**Requested By** LT SoCal Admin	**Incident No.**	**TFS No.** 820972
Added a checkbox parameter to show Product Type instead of Order Type. **Affected item(s):** SSCORP5594.rpt - Commissions by Escrow Officer			

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

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Openings by Marketing Rep w/Splits			
New/Mod Change Request	**Requested By** FNT SD - Sho	**Incident No.**	**TFS No.** 821362
Changed to include non-marketing source reps. **Affected item(s):** SSCORP5575.rpt - Openings by Marketing Rep w/Splits			

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COLORADO

DOCUMENTS

Escrow

Affidavit (Final Bills Paid)

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.

Affected item(s):
COD1059.doc - Affidavit (Final Bills Paid)

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Cashier's Check Request

New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT CO		824322

Removed "Castle Rock" and "Greeley" as selections from the branch dropdown prompt.

Affected item(s):
COD1125.doc - Cashier's Check Request

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Payoff Request

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.

Affected item(s):
COD1262.doc - Payoff Request

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TC Release

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Heritage Title		821930

Added Andy Mollock to dropdown option.

Affected item(s):
COD1130.doc - TC Release

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Title Report

New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT CO		822002

Revised to be able to pull multiple properties to one form.

Affected item(s):
COD1100.doc - Title Report

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Title

CO 107.12-06 - Title Down Date
CO 107.12A-06 - Title Down Date

New/Mod	Requested By	Incident No.	TFS No.
Change Request	CO Heritage Title		824766

A new custom field has been added on the Endorsements screen for these endorsements only to "Enter date endorsement is being issued".

Affected item(s):
SSCORPD0792.doc - All Endorsements
SSCORPD0894.doc - All Mgmt Endorsements
COMD1017.doc - All Endorsements (Commercial)
COMD1018.doc - All Mgmt Endorsements (Commercial)

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CONNECTICUT

DOCUMENTS

Title

SE 553 - Deletion of Arbitration

New/Mod	Requested By	Incident No.	TFS No.
New Request	CT State Counsel		824884

Per Form Filing and direction of state counsel, the SE 553 - Deletion of Arbitration endorsement is now available for issuance in the state of Connecticut.

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

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

2006 ALTA Loan:
This endorsement hereby amends the policy by deleting Paragraph 13 of the Conditions relating to Arbitration.

2021 ALTA Loan:
This endorsement hereby amends the policy by deleting Paragraph 18 of the Conditions relating to Arbitration.

2006 ALTA Owner's:
This endorsement hereby amends the policy by deleting Paragraph 14 of the Conditions relating to Arbitration.

2021 ALTA Owner's:
This endorsement hereby amends the policy by deleting Paragraph 19 of the Conditions relating to Arbitration.

Note: The previous/existing (CT DelArb) Deletion of Arbitration endorsement will remain available for use with the 2006 policies, if preferred, but the SE 553 can be used instead.

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INTEGRATIONS

SafeAudit (Lakehouse)			
New/Mod	**Requested By**	**Incident No.**	**TFS No.**
New			

Installation of SAFe Audit v1.5.1.0.

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.

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SoftPro Select Commercial (CSS) Import Tool			
New/Mod	**Requested By**	**Incident No.**	**TFS No.**
New			

Installation of Commercial (CSS) Import Tool v1.18.0.0.

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..

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FLORIDA

DOCUMENTS

Escrow

Deed (Guardian's - Individual)			
New/Mod Change Request	**Requested By** Florida	**Incident No.**	**TFS No.** 824324
Corrected typo in 3rd paragraph. **Affected item(s):** FLD1115.doc - Deed (Guardian's - Individual)			

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Notary Blocks Breaking Across Pages			
New/Mod Change Request	**Requested By** Trident	**Incident No.**	**TFS No.** 824601
Corrected instances of the notary blocks breaking across pages.			

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Title

ALTA 9.3-06 - Restrictions, Encroachments, Minerals (with Florida Modifications) 2020			
New/Mod New Request	**Requested By** Form Filing	**Incident No.**	**TFS No.** 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

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

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smartview Order Synch

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

This release includes:

- When a Fidelity operation has been configured to not have a new smartview order created when the ProForm Order's Owning Profile has been revised, the ProForm Order remains linked to the existing smartview order, if one exists.

  If a smartview Order does not existing when the Owning Profile is updated, a new smartview order is created in the Office ID of the revised Owning Profile.

  NOTE: If the user is not assigned, in smartview to the Office ID of the revised Owning Profile, they will not be able to publish documents to that smartview order.

- When a Fidelity operation has been configured to not have a new smartview order created when the ProForm Order's Owning Profile is revised, a Note is created in the smartview order each time it is revised..

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HAWAII

DOCUMENTS

Escrow

Letter (Cancellation Agreement 1)			
New/Mod Change Request	**Requested By** Title Guaranty	**Incident No.**	**TFS No.** 824928
Updated language to comply with the EIS. **Affected item(s):** HID1211.doc - Letter (Cancellation Agreement 1)			

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Letter (Cancellation Agreement 2)			
New/Mod Change Request	**Requested By** Title Guaranty	**Incident No.**	**TFS No.** 824561
Removed 2nd and 3rd paragraphs. **Affected item(s):** HID1213.doc - Letter (Cancellation Agreement 2)			

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Letter (Opening - Buyer - Seller)			
New/Mod Change Request	**Requested By** FT HI	**Incident No.**	**TFS No.** 821905
Removed reference to Preliminary Title Reports. **Affected item(s):** HID1025.doc - Letter (Opening - Buyer - Seller)			

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Letter (Prelim Report to Buyer-Buyer Agent)			
New/Mod Change Request	**Requested By** TG HI	**Incident No.**	**TFS No.** 821725
Various changes. Please render to view in full. **Affected item(s):** HID1189.doc - Letter (Prelim Report to Buyer-Buyer Agent)			

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Letter (Prelim Report to Seller-Seller Agent)			
New/Mod Change Request	**Requested By** TG HI	**Incident No.**	**TFS No.** 821727
Various changes. Please render to view in full. **Affected item(s):** HID1188.doc - Letter (Prelim Report to Seller-Seller Agent)			

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Letter (RPT Closing)			
New/Mod New Request	**Requested By** FT HI	**Incident No.**	**TFS No.** 821901
New document. Please render to view in full. **Affected item(s):** HID1445.doc - Letter (RPT Closing)			

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IDAHO

DOCUMENTS

Escrow

Homeowner Exemption - Ada County			
New/Mod Change Request	**Requested By** System Admin	**Incident No.**	**TFS No.** 821874
Updated to most recent version which removed the 2nd page. **Affected item(s):** IDD1038.doc - Homeowner Exemption - Ada County			

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INTEGRATIONS

smartview Accounting Forms			
New/Mod New	**Requested By**	**Incident No.**	**TFS No.**

Installation of Accounting Forms v1.5.1.0.

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.

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MY SCREENS

Recording Instructions

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

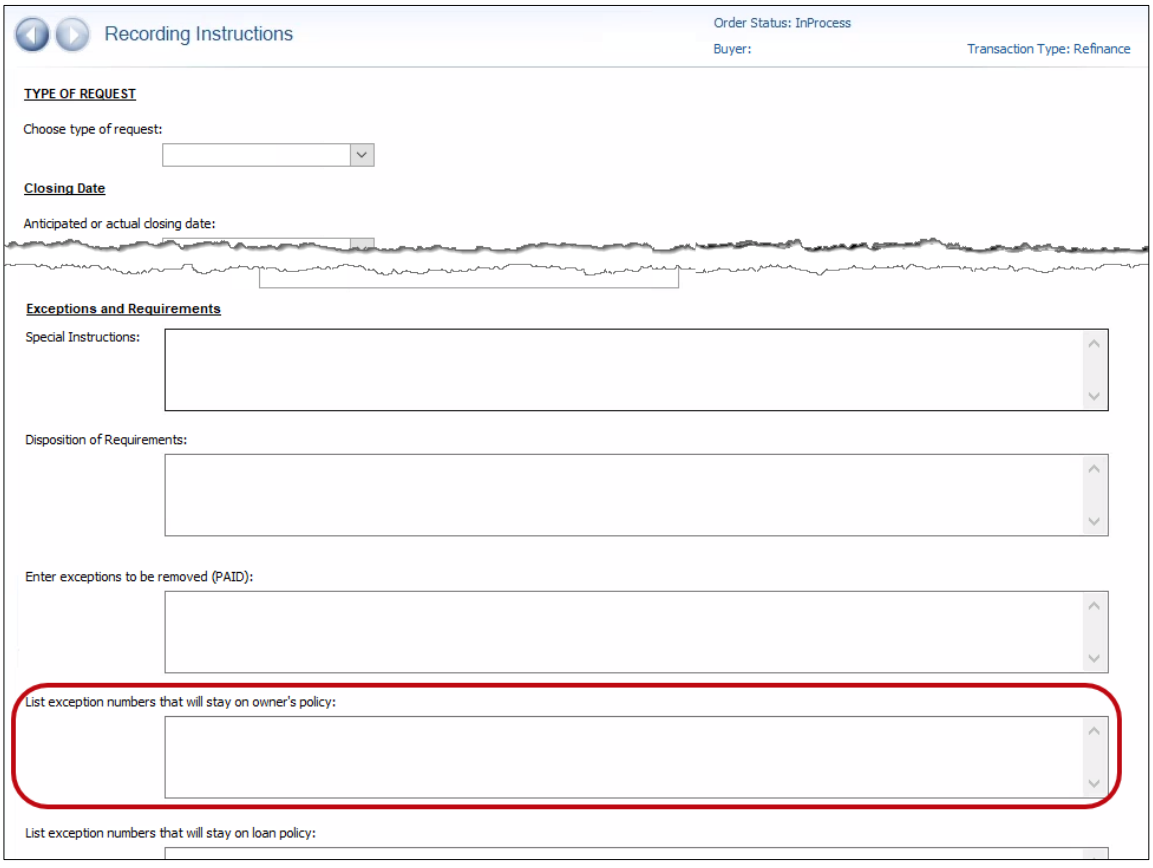
The **Recording Instructions** screen has been modified by updating the custom field, **List exception numbers that will stay on owner's policy,**

from: **Order.Title.TitleInsuranceCalculations.LoanPolicy.ExcOnPolicy_FNFID#**

to: **Order.ExcOnOwnersPolicy_FNFID#**

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

- **IDMT All Screens**
- **IDMT Commercial**
- **IDMT Commercial CSS**
- **IDMT Escrow Screens**
- **IDMT Title Screen**



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ILLINOIS

DOCUMENTS

Escrow

Adding Closing Date (2)			
New/Mod Change Request	**Requested By** CT Chicago Metro	**Incident No.**	**TFS No.** 824332
Added closing date. **Affected item(s):** ILD0360.doc – Recording Request Sheet ILD0537.doc – Remote Recording Request Sheet			

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Closing Confirmation (LT)			
New/Mod Change Request	**Requested By** FT IN	**Incident No.**	**TFS No.** 824971
Corrected address to include the suite number. **Affected item(s):** IND1022.doc – Closing Confirmation (LT)			

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Money Market Account			
New/Mod Change Request	**Requested By** Downstate CT Metro	**Incident No.**	**TFS No.** 824326
Removed 5 bank selections for CT Downstate operations. **Affected item(s):** ILD0502.doc – Money Market Account			

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REPORTS

Closing Buyer Attorney			
New/Mod Change Request	**Requested By** Anita Kaneps	**Incident No.**	**TFS No.** 819853
Updated to find an alternative way to identify the Buyer's Attorney, which used to be the 2nd AT. **Affected item(s):** SSCORP5528.rpt – Closing Buyer Attorney			

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Closing Buyer Attorney – Part 2			
New/Mod Change Request	**Requested By** Anita Kaneps	**Incident No.**	**TFS No.** 820755
Added additional columns to the report. **Affected item(s):** SSCORP5528.rpt – Closing Buyer Attorney			

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INDIANA

DOCUMENTS

Escrow

Dual Closing Confirmation			
New/Mod Change Request	**Requested By** FT IN	**Incident No.**	**TFS No.** 825000
Updated to prompt for email contact. **Affected item(s):** IND1118.doc - Dual Closing Confirmation			

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Sales Disclosure (2023)			
New/Mod Change Request	**Requested By** FT IN	**Incident No.**	**TFS No.** 825100
Updated to look to forward address and cell phone in section J. **Affected item(s):** IND1336.doc - Sales Disclosure (2023)			

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Waiver Mortgage Exemption			
New/Mod Change Request	**Requested By** FT IN	**Incident No.**	**TFS No.** 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." **Affected item(s):** IND1031.doc - Waiver Mortgage Exemption			

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KENTUCKY

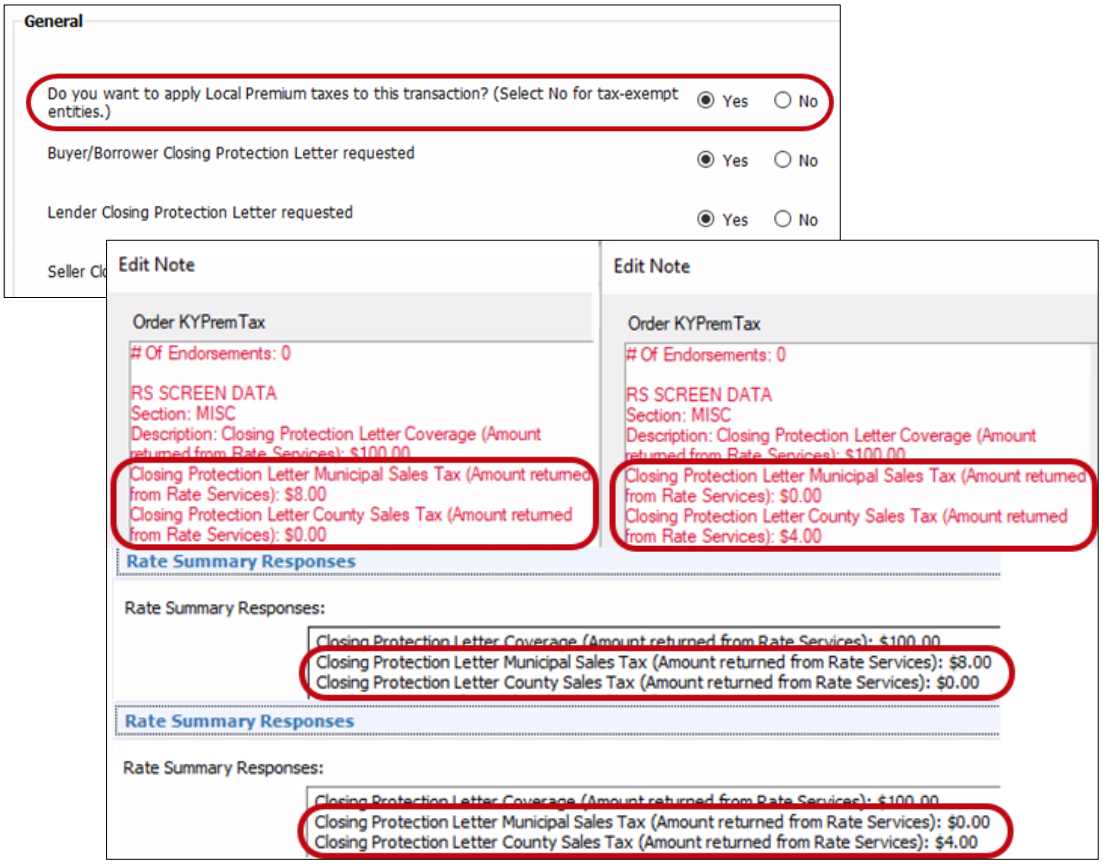
INTEGRATIONS

Rate Services Tool

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

This release includes:

- 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.



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INTEGRATIONS

SafeAudit (Lakehouse)			
New/Mod New	**Requested By**	**Incident No.**	**TFS No.**

Installation of SAFe Audit v1.5.1.0.

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.

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SoftPro Select Commercial (CSS) Import Tool			
New/Mod New	**Requested By**	**Incident No.**	**TFS No.**

Installation of Commercial (CSS) Import Tool v1.18.0.0.

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..

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MARYLAND

DOCUMENTS

Escrow

Report of Title			
New/Mod Change Request	**Requested By** NCS Baltimore	**Incident No.**	**TFS No.** 821992
Added signature to the line. **Affected item(s):** MDD1045.doc – Report of Title			

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INTEGRATIONS

SafeAudit (Lakehouse)

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

Installation of SAFe Audit v1.5.1.0.

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.

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SoftPro Select Commercial (CSS) Import Tool

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

Installation of Commercial (CSS) Import Tool v1.18.0.0.

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..

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MASSACHUSETTS

INTEGRATIONS

SafeAudit (Lakehouse)			
New/Mod	**Requested By**	**Incident No.**	**TFS No.**
New			

Installation of SAFe Audit v1.5.1.0.

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.

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SoftPro Select Commercial (CSS) Import Tool			
New/Mod	**Requested By**	**Incident No.**	**TFS No.**
New			

Installation of Commercial (CSS) Import Tool v1.18.0.0.

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..

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MICHIGAN

DOCUMENTS

Escrow

ABAs			
New/Mod New Request	**Requested By** CT MI	**Incident No.**	**TFS No.** 821878
New ABAs.			

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POA Updates (5)			
New/Mod New Request	**Requested By** FT MI	**Incident No.**	**TFS No.** 823699
Updated documents to reflect the most recently provided versions. Please render to view in full. **Affected item(s):** MID1125.doc – Acknowledgment (Durable Power of Attorney) MID1095.doc – Power of Attorney (Buyer-Borrower) MID1200.doc – Power of Attorney (Buyer-Borrower) Legal MID1094.doc – Power of Attorney (Seller) MID1201.doc – Power of Attorney (Seller) Legal			

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MISSOURI

DOCUMENTS

Escrow

Northeast Public Sewer District			
New/Mod Change Request	**Requested By** Security Title	**Incident No.**	**TFS No.** 824558
Updated to most recently provided version. Please render to view. **Affected item(s):** MOD1239.doc – Northeast Public Sewer District			

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REPORTS

Seller Closing Disclosure Form (CDF) – HUD & CDF			
New/Mod Change Request	**Requested By** SLT Admin	**Incident No.**	**TFS No.** 819807
Updated for SLT to have the “Print Seller Signature” parameter default to “Attachment” for the Seller Closing Disclosure Form. **Affected item(s):** SSCORPD5469.spdoc – Seller Closing Disclosure Form (CDF)			

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MONTANA

DOCUMENTS

Escrow

Deed (Warranty) (2)			
New/Mod Change Request	**Requested By** CT MT	**Incident No.**	**TFS No.** 823138
Removed vertical line from top of first page. **Affected item(s):** MTD0005.doc – Deed (Warranty) Legal MTD0217.doc – Deed (Warranty)			

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INTEGRATIONS

smartview Accounting Forms			
New/Mod	**Requested By**	**Incident No.**	**TFS No.**
New			

Installation of Accounting Forms v1.5.1.0.

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.

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MY SCREENS

Recording Instructions

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

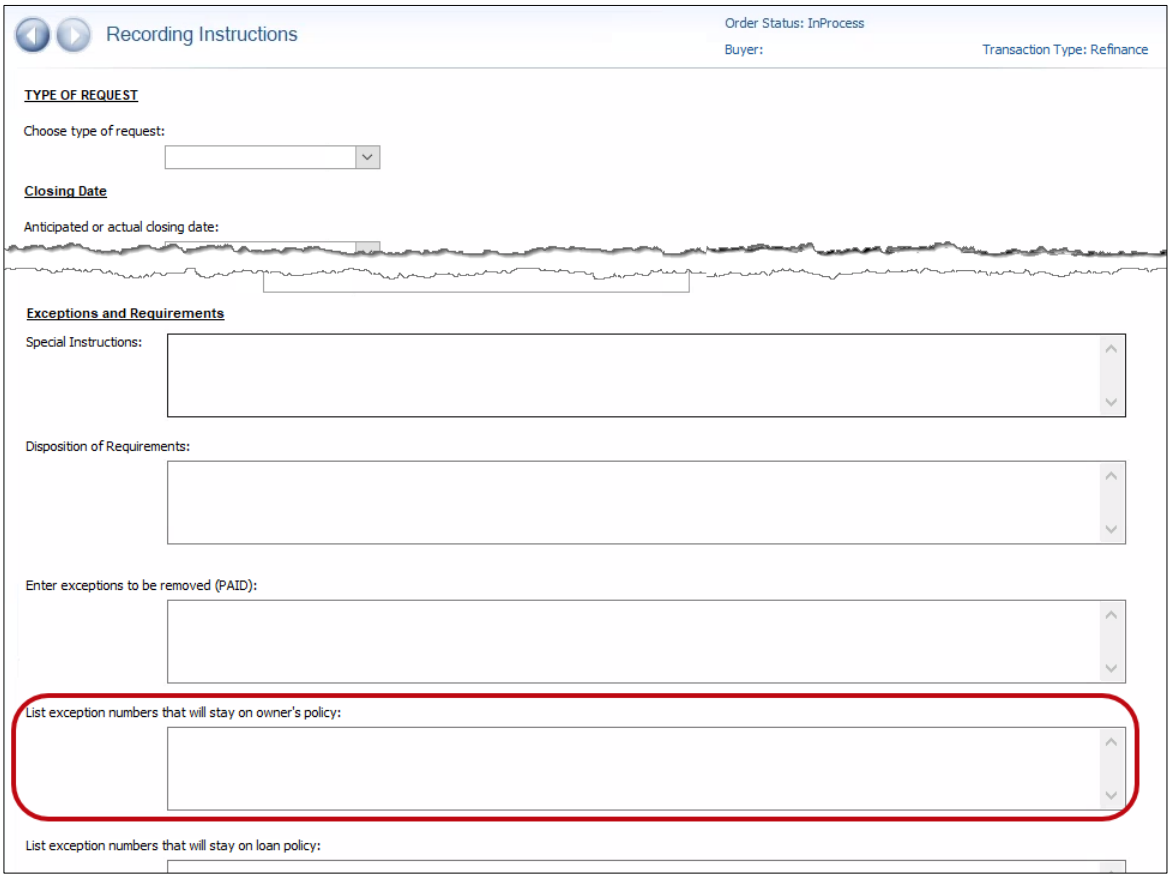
The **Recording Instructions** screen has been modified by updating the custom field, **List exception numbers that will stay on owner's policy,**

from: **Order.Title.TitleInsuranceCalculations.LoanPolicy.ExcOnPolicy_FNFID#**

to: **Order.ExcOnOwnersPolicy_FNFID#**

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

- **IDMT All Screens**
- **IDMT Commercial**
- **IDMT Commercial CSS**
- **IDMT Escrow Screens**
- **IDMT Title Screen**



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NEVADA

DOCUMENTS

Escrow

Bill of Sale

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Escrow Admin		821907

Added prompt to include exhibit A language. Please render to view.

Affected item(s):
NVD1015.doc - Bill of Sale

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Commitment Write-up Form

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Reno, NV		824948

New document. Please render to view in full.

Affected item(s):
NVD1465.doc - Commitment Write-up Form

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Demand - Private

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Nevada		824926

Revised to show as DEMAND STATEMENT rather than Beneficiary.

Affected item(s):
SSCORPD0360.doc - Demand - Private

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EI - Disbursement (2)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Ticor Title		824973

Suppressed the "Instructions to Transfer Proceeds to Seller's Purchase Transaction" section when the contact type is buyer/borrower.

Affected item(s):
SSCORPD1895.doc - EI - Disbursement
SSCORPD5366.doc - EI - Disbursement (Legal)

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EI - Refresh and Refurbish

New/Mod	Requested By	Incident No.	TFS No.
New Request	Ticor Title Reno		822295

New document. Please render to view in full.

Affected item(s):
NVD1461.doc - EI - Refresh and Refurbish

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HOA NonActive Disclosure			
New/Mod Change Request	**Requested By** Ticor Title of Nevada	**Incident No.**	**TFS No.** 824320
Updated to show the seller's signatures. **Affected item(s):** NVD1263.doc - HOA NonActive Disclosure			

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

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Recording Cover Sheet (Affidavit of Death)			
New/Mod New Request	**Requested By** Ticor Title	**Incident No.** INC240251145	**TFS No.** 824969
New document. Please render to view. **Affected item(s):** NVD1466.doc - Recording Cover Sheet (Affidavit of Death)			

Back to Table of Contents

Washoe County Notice of Exemption			
New/Mod Change Request	**Requested By** TT Reno	**Incident No.**	**TFS No.** 823795
Updated to most recent version provided. **Affected item(s):** NVD1217.doc - Washoe County Notice of Exemption			

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Title

CLTA Preliminary Report Form 2023 (NV)
CLTA Preliminary Report Form 2023 (NV) (Reno)

New/Mod	Requested By	Incident No.	TFS No.
New Request	NV State Counsel		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.

Affected item(s):
NVD1451.doc - CLTA Preliminary Report Form 2023 (NV)
NVD1452.doc - CLTA Preliminary Report Form 2023 (NV) Reno

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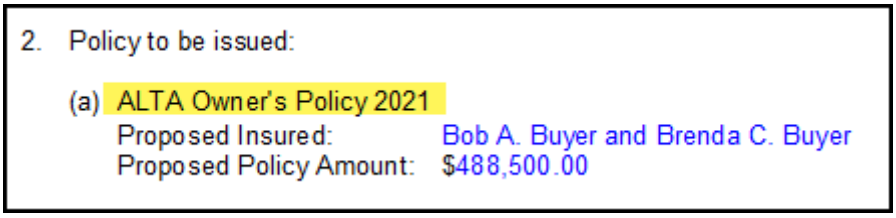
ALTA Commitment 2021 (NV)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Ticor Reno		821999

For Ticor Reno operation only - Removed the "Standard" reference from the Policy description on Schedule A that shows for NV operations.


2. Policy to be issued:

(a) ALTA Owner's Policy 2021
Proposed Insured: Bob A. Buyer and Brenda C. Buyer
Proposed Policy Amount: $488,500.00

Affected item(s):
NVD1289.doc - ALTA Commitment 2021 (NV)
NVD1020.doc - ALTA Commitment 2016 (NV)

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NEW JERSEY

DOCUMENTS

Escrow

Seller's Residency Certification-Exemption			
New/Mod Change Request	**Requested By** NV NCS	**Incident No.**	**TFS No.** 821594
Form updated to match the current state version from 11-23. **Affected item(s):** NJD1009.doc - Seller's Residency Certification-Exemption			

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NEW YORK

DOCUMENTS

Escrow

Letter Search			
New/Mod Change Request	**Requested By** Buffalo	**Incident No.**	**TFS No.** 823218
Added "TOTAL COST". **Affected item(s):** NYD1113.doc - Letter Search			

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INTEGRATIONS

SafeAudit (Lakehouse)			
New/Mod New	**Requested By**	**Incident No.**	**TFS No.**

Installation of SAFe Audit v1.5.1.0.

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.

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SoftPro Select Commercial (CSS) Import Tool			
New/Mod New	**Requested By**	**Incident No.**	**TFS No.**

Installation of Commercial (CSS) Import Tool v1.18.0.0.

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..

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OHIO

DOCUMENTS

Escrow

ALTA 2021 vs. ALTA Homeowners (Rev. 09-01-14)			
New/Mod Change Request	**Requested By** CT OH	**Incident No.**	**TFS No.** 824328
Add checkbox pertaining to additional survey coverage. **Affected item(s):** OHD1234.doc - ALTA 2021 vs. ALTA Homeowners (Rev. 09-01-14)			

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Deed Margins (21)			
New/Mod Change Request	**Requested By** OH	**Incident No.**	**TFS No.** 821944
Updated margins to 1.5" on the sides to ensure it is within the 1" requirement. **Affected item(s):** 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)			

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

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Property Exemption Form (Cuyahoga)

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.

Affected item(s):
OHD1475.doc - Property Exemption Form (Cuyahoga)

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Tax Certification

New/Mod	Requested By	Incident No.	TFS No.
Change Request	CTOH-North		821895

Added prompt for Special Assessment.

Affected item(s):
OHD1372.doc - Tax Certification

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OKLAHOMA

DOCUMENTS

Escrow

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

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

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OREGON

DOCUMENTS

Escrow

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

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

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Title Plant Records Report			
New/Mod Change Request	**Requested By** System Admin	**Incident No.**	**TFS No.** 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. **Affected item(s):** ORD1298.doc - Title Plant Records Report			

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Verification of Commission			
New/Mod Change Request	**Requested By** WT Bend	**Incident No.**	**TFS No.** 824566
Updated to reflect the most recently provided version. Please render to view in full. **Affected item(s):** ORD1457.doc - Verification of Commission			

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PENNSYLVANIA

DOCUMENTS

Title

State of Pennsylvania (TIRBOP) Form Filing effective August 1, 2024			
New/Mod New Request	**Requested By** Form Filing	**Incident No.**	**TFS No.** 822542

New/Revised forms per State of Pennsylvania (TIRBOP) Form Filing effective August 1, 2024.

New endorsements:
TIRBOP 1212 Access End (08-01-24) (OP or LP)
TIRBOP 1670 ALTA End 48 Tribal Waivers and Consents End (08-01-24) (OP or LP)

Revised endorsements:
TIRBOP 500 ALTA 11 Mortgage Modification End, w-PA Mod (07-01-21) (LP)
TIRBOP 1080 Abbreviated Form End (08-01-24) (LP)
TIRBOP 1100 Waiver of Arbitration End (08-01-24) (OP or LP)
TIRBOP 1331 ALTA 29.2-06 Interest Rate Swap – Direct Obligation – Defined Amount End (08-01-24) (LP)
TIRBOP 1332 ALTA 29.3-06 Interest Rate Swap – Additional Interest – Defined Amt End (08-01-24) (LP)
TIRBOP 1420 ALTA End 36.1-06 Energy Project – Leasehold/Easement (08-01-24) (LP)

Technical correction for policy:
ALTA Expanded Coverage Residential Loan Policy-Current Assess w-PA Mod (07-01-21)

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INTEGRATIONS

SafeAudit (Lakehouse)			
New/Mod	**Requested By**	**Incident No.**	**TFS No.**
New			

Installation of SAFe Audit v1.5.1.0.

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.

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SoftPro Select Commercial (CSS) Import Tool			
New/Mod	**Requested By**	**Incident No.**	**TFS No.**
New			

Installation of Commercial (CSS) Import Tool v1.18.0.0.

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..

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SOUTH CAROLINA

DOCUMENTS

Escrow

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

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

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INTEGRATIONS

SafeAudit (Lakehouse)			
New/Mod	**Requested By**	**Incident No.**	**TFS No.**
New			

Installation of SAFe Audit v1.5.1.0.

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.

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SoftPro Select Commercial (CSS) Import Tool			
New/Mod	**Requested By**	**Incident No.**	**TFS No.**
New			

Installation of Commercial (CSS) Import Tool v1.18.0.0.

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..

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TEXAS

REPORTS

Order Count/Revenue Summary

New/Mod	Requested By	Incident No.	TFS No.
Change Request	FT Houston Admin		819690

Updated to exclude non-human entities from being counted as sales reps when the report is run for Sales Rep Separated

Affected item(s):
SSCORP5092.rpt - Order Count/Revenue Summary

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Statistical Report

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Glen Betty - FNTG TX		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'.

Affected item(s):
SSCORP5272.rpt - Statistical Report

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WASHINGTON

DOCUMENTS

Escrow

Master Real Estate Excise Tax Affidavit (6)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	WA DOR		821966

Updated to most recent version from the website.

Affected item(s):
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

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Rate Services Tool

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

- 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.

- Sales Tax

  RESOLVED: Error identified when a Title & Escrow order is requesting Sales Tax

  - Title & Escrow orders now use the Settlement Agent's address for the taxing jurisdiction.
  - Title only orders continue to use the Title Company's address for the taxing jurisdiction.
  - Responses can be viewed via the Audit View tab, Order Notes and the Rate Summary Response section.

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REPORTS

Transaction Form

New/Mod	Requested By	Incident No.	TFS No.
Change Request	LT AZ Admin		820914

Updated as Follows:

For the Signature date, pull the "Transaction Date" not the "Trust Accounting Date, except for the profiles below, where the date does not show:

%WA\CPF-Admin\FT%
%WA\CPF Sea\EVE\CT Everett%
%WA\CPF Sea\SEA\CT Seattle Tacoma%

Affected item(s):
SSCORP5002.rpt - Transaction Form

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WISCONSIN

DOCUMENTS

Escrow

Search Sheet			
New/Mod Change Request	**Requested By** CTWI	**Incident No.** INC240227668	**TFS No.** 822261
Revised to remove the people associated with the organization. (CT operations only) **Affected item(s):** WID0110.doc - Search Sheet			

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

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Title

Commitment to Issue Mortgage Modification and Date Down (SE390-06)			
New/Mod New Request	**Requested By** WI State Counsel	**Incident No.**	**TFS No.** 821914

Form updated throughout, per State Counsel.

ENDORSEMENT - SE 390-06

COMMITMENT TO ISSUE MORTGAGE MODIFICATION AND DATE DOWN

Issued By:

First American Title™

Attached to Policy Number:

PROFORMA SPECIMEN

Charge: PROFORMA SPECIMEN

The Company hereby agrees to issue a Mortgage Modification and Date Down Endorsement to the above policy, in the form attached (subject to the additional matters described below), upon the due execution and recording of a modification or amendment to the insured Mortgage, which was recorded on _____ as Document No. _____, and upon payment of the premium on the enclosed invoice.

The Company should be furnished with the following:

A. The proposed Modification, to be recorded.

B. An original or certified copy of a resolution authorizing the transaction contemplated herein and any amendments or changes to the entity documentation.

C. If the terms of the loan permit the borrower to use any of the loan funds for construction, the mortgage must recite on its first page that it is a construction mortgage pursuant to Wisconsin Statutes.

The following matters will be shown as additional Exceptions in Schedule B of the policy unless satisfactorily cleared or subordinated to the lien of the insured mortgage, as modified:

1. Matters first appearing in the public records subsequent to _____ at 8:00 AM, the effective date of this commitment, and prior to recording of the amendment.
2. Special taxes or assessments, if any, payable with the taxes levied or to be levied for the current and subsequent years, assessed on or after _____.
3. Liens, hook-up charges or fees, deferred charges, reserve capacity assessments, impact fees, or other charges or fees due payable on the development or improvement of the Land, assessed or charged after _____.
4. Any lien, or right to a lien, for services, labor, or material performed after _____ imposed by law and not shown by the public records.
5. Rights or claims of parties in possession since _____, not shown by the public records.
6. Any encroachment, encumbrance, violation, variation, or adverse circumstance affecting the Title that would be disclosed by an accurate and complete land survey of the Land since _____.
7. Easements or claims of easements not shown by the public records and first created or affecting the property since _____.
8. Any claim of adverse possession or prescriptive easement first affecting the property since _____.

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Mortgage Modification and Date Down (SE391-06)

New/Mod	Requested By	Incident No.	TFS No.
New Request	WI State Counsel		821917

Form updated throughout, per State Counsel.

ENDORSEMENT - SE 391-06 **MORTGAGE MODIFICATION**

Issued By:

First American Title™

Attached to Policy Number:

PROFORMA SPECIMEN

Charge: PROFORMA SPECIMEN

1. The Company hereby amends Schedule A, B Part-I and B Part-II of the policy as follows:
   A. Schedule A is hereby amended as follows:
      i. The Date of Policy is amended to: _____
      iii. Title is vested in: _____
      iv. The Mortgage identified in Schedule A Part 4 is amended by adding the following:
      _____
   B. Schedule Part-I is hereby amended as follows:
      i. The following Exceptions are added:
      _____
      ii. The following Exceptions are amended as follows:
      _____
      iii. The following Exceptions are deleted:
      _____
   C. Schedule Part-II is hereby amended as follows:
      i. The following Exceptions are added:
      _____
      ii. The following Exceptions are amended as follows:
      _____
      iii. The following Exceptions are deleted:
      _____
2. The endorsements issued with the Original Policy, if any, are hereby amended, added, or deleted as follows:
   A. The coverage provided by the following endorsements is extended to the Date of Policy as amended herein:
   _____
   B. The following previously issued endorsements are hereby deleted:
   _____
3. The following endorsements attached hereto are added to the policy as of (AMENDED DATE OF POLICY):
   _____

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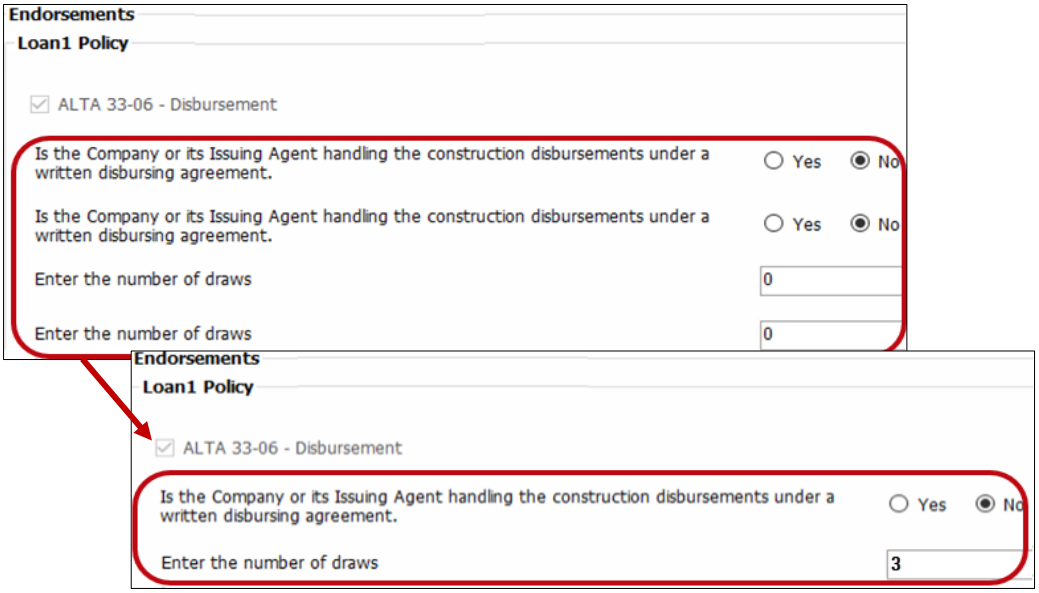
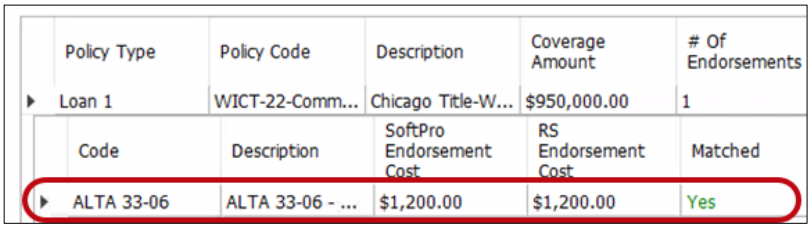
Rate Services Tool			
New/Mod	**Requested By**	**Incident No.**	**TFS No.**
Mod			

- 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.

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LIBERTY TITLE

DOCUMENTS

Escrow

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

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NCS

DOCUMENTS

Escrow

Report of Title			
New/Mod Change Request	**Requested By** NCS Baltimore	**Incident No.**	**TFS No.** 821992
Added signature to the line. **Affected item(s):** MDD1045.doc - Report of Title			

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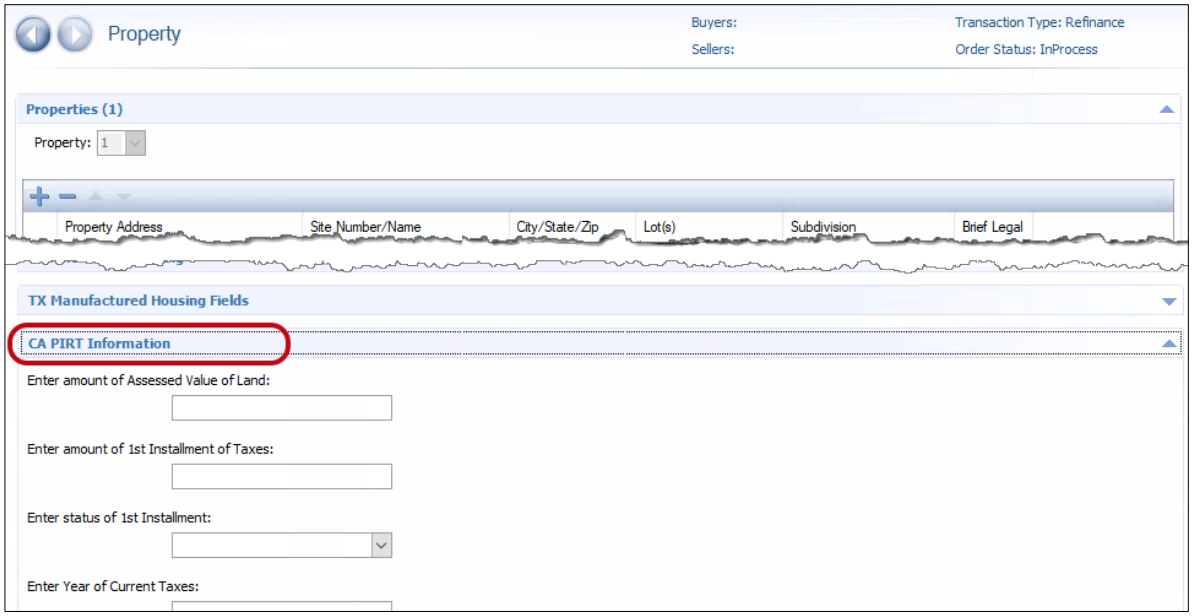
MY SCREENS

Property Screen

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

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.



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SERVICELINK

DOCUMENTS

Escrow

Earnest Money and Purchase Agreement Receipt			
New/Mod New Request	**Requested By** ServiceLink	**Incident No.**	**TFS No.** 822275
New document. Please render to view in full. **Affected item(s):** SLD1105.doc - Earnest Money and Purchase Agreement Receipt			

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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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