

SOFTPRO SELECT

June 2025

RELEASE NOTES



Testing Release Date: May 30, 2025
Production Release Date: June 9, 2025



TABLE OF CONTENTS

- ALL STATES/SITES..... 9
- DOCUMENTS..... 9
 - Escrow 9
 - Wire Information (no prompts)*..... 9
 - Title 10
 - ALTA 22-06 - Location* 10
 - ALTA 22.1-06 - Location and Map* 10
- REPORTS 11
 - Cash Application - Invoices for Payment (UG400B)* 11
 - Order Log* 11
 - Orders by Settlement Date*..... 11
 - Potential Cash Reporting by Transaction Date*..... 12
 - Settlement Statements*..... 12
- ARIZONA 13
- DOCUMENTS..... 13
 - Escrow 13
 - Courthouse Fax Sheet* 13
 - EI Sale (EIS)* 13
 - Escrow/Title..... 13
 - Condition of Title Documents* 13
- INTEGRATIONS 14
 - Rate Validation Tool*..... 14
- CALIFORNIA..... 15
- DOCUMENTS..... 15
 - Escrow 15
 - EI Commercial Sale (EIS)* 15
 - EI Sale (Seller's) (EIS)* 15
 - General Provisions*..... 15
 - Laguna Forms*..... 16
 - Recon Docs (2)*..... 16
- MY SCREENS 17
 - Existing Liens Screen* 17
 - Policy – Schedule A Screen*..... 18
 - TSG – Schedule A Screen* 19
 - Various Screens* 20



RELEASE NOTES

JUNE 2025

REPORTS 21

- Data Download* 21
- EPU Task Summary/Productivity by County Manager* 21
- EPU Task Summary/Productivity by Employee* 21
- EPU Trends* 22
- Order Count/Revenue Summary* 22
- Settlement Statements - HUD/CDF* 22
- Settlement Statements (CSS)* 22

COLORADO 23

DOCUMENTS 23

- Escrow 23
 - Deed (Statutory Special Warranty Deed RAH AH3)* 23
 - Statement of Information* 24

INTEGRATIONS 25

- Rate Validation Tool* 25

REPORTS 27

- EPU Task Summary/Productivity by County Manager* 27
- EPU Task Summary/Productivity by Employee* 27
- EPU Trends* 27

FLORIDA 28

DOCUMENTS 28

- Escrow 28
 - Affidavit (Homestead)* 28
 - Homestead Affidavit Checklist* 28

INTEGRATIONS 29

- Smartview Accounting Forms* 29

HAWAII 30

DOCUMENTS 30

- Escrow 30
 - Letter (Controlled Business Arrangement Discl)* 30

ILLINOIS 31

DOCUMENTS 31

- Escrow 31
 - Cashier's Check Requests (2)* 31
- Title 32
 - SE 553 - Deletion of Arbitration - ADDED* 32



RELEASE NOTES

JUNE 2025

*SE 510 - Deletion of Arbitration - ALTA Loan or ALTA Exp Cvg Res Loan (2021) -
REMOVED SE 511 - Deletion of Arbitration - ALTA Owners Policy (2021) -
REMOVED* 32

REPORTS 33

Closing Calendar 33

Opened/Closed Orders by {Selection}..... 33

INDIANA..... 34

 DOCUMENTS..... 34

 Escrow 34

Closing Confirmation (LT) 34

KANSAS..... 35

 DOCUMENTS..... 35

 Title 35

ALTA 25-06 - Same as Survey - CT KANSAS CITY ONLY..... 35

ALTA 25.1-06 - Same as Portion of Survey - CT KANSAS CITY ONLY..... 35

LOUISIANA..... 36

 DOCUMENTS..... 36

 Title 36

Withdrawn ALTA Forms to be REMOVED, per LATISSO Filing 36

MASSACHUSETTS..... 37

 DOCUMENTS..... 37

 Title 37

Pending Disbursement Endorsement..... 37

 REPORTS 38

Order Exceptions 38

MARYLAND 39

 DOCUMENTS..... 39

 Escrow 39

Wire Information 39

MISSOURI 40

 DOCUMENTS..... 40

 Escrow 40

Letter (Transaction Confirmation)..... 40

 Title 41

ALTA 25-06 - Same as Survey - CT KANSAS CITY ONLY..... 41

ALTA 25.1-06 - Same as Portion of Survey - CT KANSAS CITY ONLY..... 41

MONTANA 42

 DOCUMENTS..... 42



RELEASE NOTES

JUNE 2025

Escrow 42
 Commission Clarification and Information Request 42

NEBRASKA..... 43

DOCUMENTS..... 43

 Title 43
 ALTA 25-06 - Same as Survey - CT KANSAS CITY ONLY..... 43
 ALTA 25.1-06 - Same as Portion of Survey - CT KANSAS CITY ONLY..... 43

NEVADA 44

DOCUMENTS..... 44

 Escrow 44
 Affidavit (Owner's - Commercial)..... 44
 Affidavit Revisions (5) 44
 Declaration of Value..... 44
 EI - Interest Bearing Accounts 44
 Letter (Request for Info - Indemnity) 45
 Owner Info Request..... 45
 Recording Instructions 45

 REPORTS 46
 Transaction Form - Priority..... 46

NEW JERSEY 47

INTEGRATIONS 47
 Commercial (CSS) Import Tool 47

NEW YORK..... 48

DOCUMENTS..... 48

 Escrow 48
 City of Kingston Transfer Tax - Community Preservation Fund..... 48
 Commercial Affidavit of Title and Gap Indemnity..... 48
 Examination of Title Order Letter 48
 New First Nationwide Documents 48

INTEGRATIONS 49
 Commercial (CSS) Import Tool 49

REPORTS 50
 Invoice Statement 50
 NY Application 50

NORTH CAROLINA 51

MY SCREENS 51
 Attorney Contact Screen 51



RELEASE NOTES

JUNE 2025

OHIO..... 52

DOCUMENTS..... 52

Escrow 52

IBA Service Form (Capital One)..... 52

OKLAHOMA..... 53

DOCUMENTS..... 53

Escrow 53

Affidavit (for Title or Ownership of Land - Individual) 53

OREGON 54

DOCUMENTS..... 54

Escrow 54

Assignee Instructions..... 54

REPORTS 55

SPAdmin-Custom Source of Business Export..... 55

SPAdmin-Custom Source of Business Export-Missing Fields 55

PENNSYLVANIA..... 56

DOCUMENTS..... 56

Escrow 56

Owner Affidavits (9) 56

RHODE ISLAND 57

INTEGRATIONS..... 57

Commercial (CSS) Import Tool 57

TEXAS 58

INTEGRATIONS..... 58

Commercial (CSS) Import Tool..... 58

REPORTS 59

Dallas CPF Daily Summary..... 59

Opened/Closed Orders by {Selection}..... 59

UTAH 60

INTEGRATIONS..... 60

Rate Validation Tool..... 60

WASHINGTON..... 62

DOCUMENTS..... 62

Escrow 62

Closing Order and Recording Instructions nka Recording Instructions..... 62

Cover Page for Recordings (2)..... 62

MY SCREENS 63



RELEASE NOTES

JUNE 2025

All Screens 63

Checklist / Requested Tasks Screens..... 63

REPORTS 64

Daily Order Activity 64

Revenue by Sales Rep 64

WISCONSIN..... 65

DOCUMENTS..... 65

 Escrow 65

Personal Undertaking (Delayed Production of Waivers)..... 65

REPORTS 66

Closing Calendar 66

Opened/Closed Orders by {Selection}..... 66

ALMA TITLE..... 67

DOCUMENTS..... 67

 Escrow 67

ALMA Document Revisions (3) 67

LIBERTY TITLE..... 68

DOCUMENTS..... 68

 Escrow 68

Closing Confirmation (IL) 68

MA AGENCY..... 69

MY SCREENS 69

Commitment – Schedule A Screen 69

Pro Forma [Loan / Owner’s] – Sched A Screens..... 70

NCS 71

DOCUMENTS..... 71

 Escrow 71

IBA Authorization (ATL) 71

Indemnity Personal Undertaking ML Exceptions 2024 71

MY SCREENS 72

Closing Information Screen..... 72

Document Recording Screen 73

Escrow Agreement Screen 74

Order Entry / Data Screen..... 75

Property Screen..... 76

Survey Screen 77

REPORTS 78



RELEASE NOTES

JUNE 2025

Closing Calendar 78
Escrow Closing Log 78
Invoice Statement 78
NCS Commissions by Selection..... 78
NY Application 79
Order Count/Revenue Summary..... 79
Production Status List 79



RELEASE NOTES

JUNE 2025

ALL STATES/SITES

DOCUMENTS

Escrow

<i>Wire Information (no prompts)</i>			
New/Mod New Request	Requested By NW System Admin	Incident No.	TFS No. 867414
New document to have all prompts removed.			
Affected item(s): SSCORPD6011.doc - Wire Information (no prompts)			

[Back to Table of Contents](#)



RELEASE NOTES

JUNE 2025

Title

ALTA 22-06 - Location

ALTA 22.1-06 - Location and Map

New/Mod
Change Request

Requested By
Corporate
Underwriting Counsel

Incident No.

TFS No.
866431

At the direction of state underwriting counsel, a custom field has been added for the ALTA 22-06 and 22.1-06 endorsements to provide the option for users to type in the street address. If the custom field is left empty, the form will pull in the property address from the order, as usual.

[Back to Table of Contents](#)



REPORTS

Cash Application - Invoices for Payment (UG400B)

New/Mod Change Request	Requested By R&D / SPUG	Incident No.	TFS No. 865001
----------------------------------	-----------------------------------	---------------------	--------------------------

New Report to help track Invoices for payment through the Cash Application integration.

NOTE: This report **WILL NOT** be available until all teams complete development, testing and implementation for the Cash Application integration.

Affected item(s):
SSCORP5621.rpt - Cash Application - Invoices for Payment

[Back to Table of Contents](#)

Order Log

New/Mod Change Request	Requested By NCS NY	Incident No.	TFS No. 865672
----------------------------------	-------------------------------	---------------------	--------------------------

For NCS NY only, modified logic for results displayed in Excel - Daily Calendar export.

Logic will now display orders with the following conditions when Task Due Date and Excel-Daily Calendar are selected:

- 1 - 'Commitment Received' Due Date <= 'Date range through' date AND 'Commitment Received' has not been completed
- 2 - 'Commitment Received' Due Date is empty AND 'Commitment Received' has not been completed
- 3 - 'Order Number From Local' Due Date <= 'Date range through' date AND 'Order Number From Local' has not been completed
- 4 - 'Order Number From Local' Due Date is empty AND 'Order Number From Local' has not been completed

Affected item(s):
SSCORP5091.rpt - Order Log

[Back to Table of Contents](#)

Orders by Settlement Date

New/Mod Change Request	Requested By St Louis Title Admin - Support Mngmnt.	Incident No.	TFS No. 863765
----------------------------------	---	---------------------	--------------------------

Added "Additional Description" to the Group By dropdown parameter and updated the Programming Notes to clarify WSOB logic description.

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

[Back to Table of Contents](#)



RELEASE NOTES

JUNE 2025

Potential Cash Reporting by Transaction Date

New/Mod	Requested By	Incident No.	TFS No.
Troubleshooting	TX Dallas OAC		863955

Fixed issue showing only Direct Deposit Mediums.

Affected item(s):

SSCORP5564.rpt - Potential Cash Reporting by Transaction Date

[Back to Table of Contents](#)

Settlement Statements

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Co HTC / San Antonio TX AT / CT Alameda (NoCal) / SoCal TT SD & Boutique Escrows		864619

Updated as follows:

- 1. All States:** Fixed for when there are several properties and the labels are misaligned on page 1.
- 2. St. Louis Title:** Defaulting "Print Signature Lines (with digital signature)".
- 3. SoCal TT SD and TT Boutique Escrows** (Anchor Seaport and Beverly Whilshire): Section payee to the A contact will read from the "ShortName" field.
- 4. CO & MI:** Added prompt to select the Brokers to show IF more than one exists in the file.

Affected item(s):

SSCORPD5454.spdoc - Settlement Statements
 SSCORPD1823.rpt - Individual Settlement Statement, Legal
 SSCORPD1824.rpt - Individual Settlement Statement, Letter
 SSCORPD5460.rpt - Individual Settlement Statement, Legal (CDF)
 SSCORPD5461.rpt - Individual Settlement Statement, Letter (CDF)

[Back to Table of Contents](#)



ARIZONA

DOCUMENTS

Escrow

<i>Courthouse Fax Sheet</i>			
New/Mod Change Request	Requested By LT AZ	Incident No.	TFS No. 865785
Updated the email address.			
Affected item(s): AZD1321.doc - Courthouse Fax Sheet			

[Back to Table of Contents](#)

<i>EI Sale (EIS)</i>			
New/Mod Change Request	Requested By FNT Maricopa	Incident No. INC250183228	TFS No. 864563
Added "Buyer will execute and deliver a new Deed of Trust in the amount of \$ _____" to the document when the file has a loan.			
Affected item(s): AZD1114.doc - EI Sale (EIS)			

[Back to Table of Contents](#)

Escrow/Title

<i>Condition of Title Documents</i>			
New/Mod Change Request	Requested By Mandi Zollotuchen	Incident No.	TFS No. 867628
Making available for Owner Policies also.			
Affected item(s): AZD1217.doc - Condition of Title Report (Without Application) AZD1257.doc - Condition of Title Report			

[Back to Table of Contents](#)

Rate Validation Tool

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

This release includes:

The Residential Loan Rate Policy Code names with applicable mappings for the determined rates are changed as noted below.

- › The Policy Codes are mapped to price the Residential Loan Rate as an Electronic and Paperless transaction:

Is this transaction eligible for the Residential Loan rate?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Is this an electronic and paperless transaction?	<input checked="" type="radio"/> Yes <input type="radio"/> No

- AZXX-06a-Residential Loan Rate A Extended Loan-Zone X
- AZXX-06a-Residential Loan Rate A Short Form Loan-Zone X
- AZXX-06a-Residential Loan Rate A Standard Loan-Zone X
- AZXX-07a-Residential Loan Rate A Expanded Loan-Zone X
- AZXX-07a-Residential Loan Rate A Short Form Expanded Loan-Zone X

- › The Policy Codes are mapped to price the Residential Loan Rate as NOT being an Electronic and Paperless transaction:

Is this transaction eligible for the Residential Loan rate?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Is this an electronic and paperless transaction?	<input type="radio"/> Yes <input checked="" type="radio"/> No

- AZXX-08b-Residential Loan Rate B Extended Loan-Zone X
- AZXX-08b-Residential Loan Rate B Short Form Loan-Zone X
- AZXX-08b-Residential Loan Rate B Standard Loan-Zone X
- AZXX-09b-Residential Loan Rate B Expanded Loan-Zone X
- AZXX-09b-Residential Loan Rate B Short Form Expanded Loan-Zone X

- › Retired Policy Codes.

NOTE: If a retired Policy Code selection already exists in an order the selection remains. However, if the Policy Code is changed, the retired Policy Code will no longer be available for use.

- AZXX-06-Residential Loan Rate Standard Loan-Zone X
- AZXX-07-Electronic Residential Loan Rate Extended Loan-Zone X
- AZXX-07-Residential Loan Rate Extended Loan-Zone X
- AZXX-08-Electronic Residential Loan Rate Short Form Loan-Zone X
- AZXX-08-Residential Loan Rate Short Form Loan-Zone X
- AZXX-09-Residential Loan Rate Expanded Loan-Zone X
- AZXX-10-Residential Loan Rate Short Form Expanded Loan-Zone X
- AZXX-06-Residential (REVAMP) Rate Standard Loan-Zone X
- AZXX-07-Residential (REVAMP) Rate Extended Loan-Zone X
- AZXX-08-Residential (REVAMP) Rate Short Form Loan-Zone X
- AZXX-09-Residential (REVAMP) Rate Expanded Loan-Zone X



CALIFORNIA

DOCUMENTS

Escrow

<u><i>EI Commercial Sale (EIS)</i></u>			
New/Mod Change Request	Requested By CT Santa Clara	Incident No. INC250189798	TFS No. 866086
Added QI signature block and updated grammar of BUYER(S) IS: and SELLER(S) IS: to BUYER(S) IS/ARE: and SELLERS IS/ARE:			
<u>Affected item(s):</u> SCA0000315.doc - EI Commercial Sale (EIS)			

[Back to Table of Contents](#)

<u><i>EI Sale (Seller's) (EIS)</i></u>			
New/Mod Change Request	Requested By CA	Incident No.	TFS No. 865064
Update the Account Name to allow the user to select the contacts to render to the document if there is more than one in the file.			
<u>Affected item(s):</u> SCA0002235.doc - EI Sale (Seller's) (EIS)			

[Back to Table of Contents](#)

<u><i>General Provisions</i></u>			
New/Mod Change Request	Requested By Settlement	Incident No.	TFS No. 865145
Updated per most recent version provided by Settlement.			
<u>Affected item(s):</u> SCA0000128.doc - EI General Provisions - GP			

[Back to Table of Contents](#)



RELEASE NOTES

JUNE 2025

Laguna Forms

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Laguna Woods		865066

Various updates; please render to view.

Affected item(s):

- SCA0003212.doc - First and Final Inspection Report Request
- SCA0003213.doc - Resale Notification (VMS)
- SCA0003214.doc - Notice of Closing nka Notice of Escrow Closing
- SCA0003215.doc - Escrow Closing Notification and Transmittal Report
- SCA0003216.doc - Responsibility Agreement for Nonstandard Landscape
- SCA0003217.doc - Owner-Membership Application
- SCA0003218.doc - Third Mutual Members Who Hold More Than One Membership
- SCA0003219.doc - Trust Facilities Fee
- SCA0003220.doc - Promissory Note
- SCA0003221.doc - Financial Statement and Credit Information
- SCA0003222.doc - Financial Assets
- SCA0003224.doc - Enjoying Your Life in Third Laguna Hills Mutual
- SCA0003225.doc - Last Minute Reminders
- SCA0003226.doc - Important Information for Third Laguna Hills Mutual
- SCA0003227.doc - Application for Co-Occupancy Permit
- SCA0003274.doc - Financial Qualifications Policy
- SCA0003275.doc - Final Resale Inspections
- SCA0003276.doc - Realtor Information for Prospective Purchases in Third Laguna Hills Mutual
- SCA0003277.doc - Key File Program

[Back to Table of Contents](#)

Recon Docs (2)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Santa Clara	INC250187441	866064

Updated to allow user to select multiple people for the signature section when the lender is private.

Affected item(s):

- SCA0000269.doc - Request for Partial Reconveyance (RECON-SUB)
- SCA0000293.doc - Substitution of Trustee Full Reconveyance (RECON-SUB)

[Back to Table of Contents](#)

Existing Liens Screen

New/Mod Mod	Requested By Nancy Hesse	Incident No.	TFS No.
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The **Existing Liens** screen has been added to the **Title Misc.** screen set.

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

The screenshot displays the 'Existing Liens' screen. On the left, a navigation menu includes categories like 'Open Order/General', 'Prelim', 'Document Preparation', 'Policy Production', 'Invoice & SubEscrow', 'Guarantee', 'Title Misc', and 'Recording Information'. 'Title Misc' and 'Existing Liens' are highlighted with red boxes. The main content area shows a table titled 'Existing Liens (1)' with columns for Priority, Borrower/Mortgagor, Lender/Mortgagee, Document Type, and Existing. A single row is visible with Priority '1' and Document Type 'Mortgage'. Below the table are input fields for 'Instrument type' (set to 'Mortgage'), 'MERS registration #', and 'Mortgagor/Mortgagee Information' (with fields for 'Given by (Borrower/Mortgagor):' and 'In favor of (Lender/Mortgagee):').

[Back to Table of Contents](#)

Policy – Schedule A Screen

New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.
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The **Select to omit Exclusion 9 for the Guarantee (2025)** check box has been added to the **Policy – Schedule A** screen.

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

- > CA Title Production Screens
- > Northern CA – All Screens
- > Northern CA – Policy Screens
- > Northern CA – Title Production Screens
- > Northern CA – Title Screens
- > SoCal All Screens
- > SoCal Policy Screens
- > SoCal Production Screens
- > SoCal Title Screens
- > SoCal Title Screens Impact to SPS
- > SoCal Title Screens Impact to SPS TT
- > SoCal Title Screens LT

The screenshot shows the 'Policy - Schedule A' interface. At the top, there are navigation arrows and the title 'Policy - Schedule A'. On the right, 'Order Status: Inf' and 'Buyer:' are visible. Below the title, there are fields for 'Effective Date' (set to '(None)'), 'Effective Time' (set to '(None)'), 'Policy' (set to 'Loan Policy'), and 'Coverage amount: \$0.00'. A section titled 'Countersignature Fields' contains a table with two rows: one with 'Property Address' and 'Legal Description', and another with a checked box and 'No Legal Description'. At the bottom, a checkbox labeled 'Select to omit Exclusion 9 for the Guarantee (2025)' is highlighted with a red rectangular box. Below this is a 'Custom Fields' section.

[Back to Table of Contents](#)

TSG – Schedule A Screen

New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.
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The **2014 Trustee’s Sale** more/less bar label has been changed to the **Trustee’s Sale**.

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

- > **CA Title Production Screens**
- > **SoCal All Screens**
- > **Northern CA – All Screens**
- > **SoCal Policy Screens**
- > **Northern CA – Policy Screens**
- > **SoCal Title Screens**
- > **Northern CA – Title Production Screens**
- > **SoCal Title Screens Impact to SPS TT**
- > **Northern CA – Title Screens**
- > **SoCal Title Screens LT**


TSG - Schedule A

Order Status: InProcess
Buyer: Transaction Type: Refinance

Policy: Coverage amount: \$0.00

Policy number:

Trustee's Sale

HOA Trustee's Sale

[Back to Table of Contents](#)

Various Screens

New/Mod New	Requested By Cristal Detura	Incident No.	TFS No.
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The following screen sets have been added:

- > **Prelim**
- > **Open Order/General**
- > **Policy**
- > **Guarantee**

These changes are visible when the **My Screens > CA Title Production Screens** is selected.

Prelim

- ▶ Exam
- Prelim - Schedule A
- Property
- Prelim - Schedules B (Exceptions/Notes)
- Supplemental Report

Open Order/General

- Status
- Order Contacts
- Order Information
- Title Insurance Premiums
- Policy Selection

Policy

- Prelim - Schedule A
- Loan Information & Funding
- Policy Instructions
- Policy Instructions - Out of County
- Policy - Schedule A
- Policy - Schedules B1, B2
- Endorsements

Guarantee

- TSG - Schedule A
- Flag / PIRT - Schedule A
- Flag / PIRT / TSG - Schedule B

[Back to Table of Contents](#)



REPORTS

<i>Data Download</i>			
New/Mod Change Request	Requested By FNT SD Admin	Incident No.	TFS No. 866005
Removed time from Check_Date field			
Affected item(s): SSCORP5577.rpt - Data Download			

[Back to Table of Contents](#)

<i>EPU Task Summary/Productivity by County Manager</i>			
New/Mod Change Request	Requested By Reports Team	Incident No.	TFS No. 864454
Updated as follows:			
1. CA LT SoCal (EPRO):			
a. Rename column "PC-Final Policy" to "PC Lender Requests"			
b. Update task name:			
Current Task Name: "EPRO- Post Closing - Final Policy"			
New Task Name: "EPRO- Post Closing - Lender Request"			
Affected item(s): SSCORP5149.rpt - EPU Task Summary/Productivity by County Manager			

[Back to Table of Contents](#)

<i>EPU Task Summary/Productivity by Employee</i>			
New/Mod Change Request	Requested By Reports	Incident No.	TFS No. 864870
Updated as follows:			
1. CA LT SoCal (EPRO):			
a. Rename column "PC-Final Policy" to "PC Lender Requests"			
b. Update task name:			
Current Task Name: "EPRO- Post Closing - Final Policy"			
New Task Name: "EPRO- Post Closing - Lender Request"			
Affected item(s): SSCORP5150.rpt - EPU Task Summary/Productivity by Employee			

[Back to Table of Contents](#)



RELEASE NOTES

JUNE 2025

<i>EPU Trends</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Reports		865052
Updated as follows:			
1. CA LT SoCal (EPRO):			
a. Rename column "PC-Final Policy" to "PC Lender Requests"			
b. Update task name:			
Current Task Name: "EPRO- Post Closing - Final Policy"			
New Task Name: "EPRO- Post Closing - Lender Request"			
Affected item(s):			
SSCORP5152.rpt - EPU Trends			

[Back to Table of Contents](#)

<i>Order Count/Revenue Summary</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	NCS FNT NY		865842
For SoCal: Added another option, 'Yes-Remove END and SUB', to the 'Show revenue amounts:' drop-down.			
This will exclude END and SUB from all Revenue.			
Affected item(s):			
SSCORP5092.rpt - Order Count/Revenue Summary			

[Back to Table of Contents](#)

<i>Settlement Statements - HUD/CDF</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	SoCal JV's		866271
Updated to split the Title & Escrow charges into two sections			
Affected item(s):			
SSCORPD5454.spdoc - Settlement Statements			
SSCORPD1823.rpt - Individual Settlement Statement, Legal			
SSCORPD1824.rpt - Individual Settlement Statement, Letter			
SSCORPD5460.rpt - Individual Settlement Statement, Legal (CDF)			
SSCORPD5461.rpt - Individual Settlement Statement, Letter (CDF)			

[Back to Table of Contents](#)

<i>Settlement Statements (CSS)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Alameda (NoCal)		867117
Updated as follows: CT Alameda Lafayette: Reversing the change for the replacement of the word "Version" to "Coverage" back to "Version"			
Affected item(s):			
SSCORPD3006.spdoc - Master Statement (CSS)			
SSCORPD3007.spdoc - Buyer/Borrower Statement (CSS)			
SSCORPD3008.spdoc - Seller's Statement (CSS)			
SSCORPD3009.spdoc - Individual Statement (CSS)			

[Back to Table of Contents](#)



COLORADO

DOCUMENTS

Escrow

<i>Deed (Statutory Special Warranty Deed RAH AH3)</i>			
New/Mod New Request	Requested By Heritage Title	Incident No. INC250187434	TFS No. 867557
New document; please render to view.			
<u>Affected item(s):</u> COD1397.doc - Deed (Statutory Special Warranty Deed RAH AH3)			

[Back to Table of Contents](#)



RELEASE NOTES

JUNE 2025

<i>Statement of Information</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FT CO		865201
Remove the "last four" limitation.			
Affected item(s): COD1004.doc - Statement of Information			

[Back to Table of Contents](#)

Rate Validation Tool

New/Mod Mod / New	Requested By	Incident No.	DEVOPS No.
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This release includes:

- > Code/Configuration change: The questions, **Does this transaction involve a sale with a commitment to insure a resale** and **Is this the initial conveyance** questions are removed. When a Resale (initial)-Hold Open Policy Code is selected, the integration sends the applicable data points as true for the appropriate response.
- > Upgrade to Feature 5.0

NOTE: This feature requires configuration. Reach out to FNFRatesTeam@softprocorp.com for a demo/configuration.

The ability to compare the escrow/ancillary supported charges from Rate Services to the charges being collected in the SoftPro order.

- » The **Comparison View** now includes a new tab, **Additional Title Charges**, which includes the escrow/ancillary supported charges from Rate Services. This tab is always visible but is only accessible when Feature 5.0 is enabled. Navigation between the **Title Premiums** and **Additional Title Charges** tabs is always available when applicable charges are being compared.



- » If escrow/ancillary supported charges,
 - o Align with charges from Rate Services – the **Comparison View** tab continues to open on the **Title Premiums** tab.
 - o Does not align with charges from Rate Services – the **Comparison View** tab opens on the **Title Premiums** tab with a **Pull** button (upper right) indicating which premium/charges do not match.



Rate Validation Tool

New/Mod Mod / New	Requested By	Incident No.	DEVOPS No.
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- **Pull Title & ATC Rates** - Title and Escrow/ancillary charges do not match
- **Pull Title Rates** - Only Title premiums do not match
- **Pull ATC Rates** - Only Escrow/ancillary charges do not match

Pull Title & ATC Rates

Pull Title Rates

Pull ATC Rates

» Overwrite rates in Select order

Clicking the **Pull** button, updates the SoftPro order by pulling in the corresponding rate(s) from Rate Services and quiets the utility if the order is in a re-verification state.

If you choose not to overwrite the Select rates, the **Verify Rates** button is still available to keep the rates and provide a justification.

» Skipping Correction

The **Additional Title Premiums** tab allows the user to skip overwriting individual charges that do not match when using the **Pull** button.

Check the applicable entry to avoid overwriting the charge(s) in Select.

SPS Description	RS Description	SoftPro Premium Amount	RS Premium Amount	Matched	Skip Correction
1031 Exchange	Exchange Service Fee (...)	\$250.00	\$250.00	Yes	<input type="checkbox"/>
CA Document Signing Fee	Miscellaneous Services - ...	\$100.00	\$150.00	No	<input checked="" type="checkbox"/>
FullEscrow With Owner	Residential Sale Escrow ...	\$1,446.00	\$1,446.00	Yes	<input type="checkbox"/>
FullEscrow With Owner	Residential Sale Escrow ...	\$1,446.00	\$1,446.00	Yes	<input type="checkbox"/>
IBA Fee	Miscellaneous Services - ...	\$50.00	\$50.00	Yes	<input type="checkbox"/>
Parcel Count	If the property being ins...	\$100.00	\$200.00	No	<input type="checkbox"/>

Related document: [Rates – Verifying Rates \(Title/End/ATC\) Using Rate Services](#)



REPORTS

EPU Task Summary/Productivity by County Manager

New/Mod Change Request	Requested By Reports Team	Incident No.	TFS No. 864454
Updated as follows:			
<p>1. CO:</p> <ul style="list-style-type: none"> a. Add column for the "Order CIC Docs Received" task to the "CO-All EPU Tasks" column display option b. Add new Tasks for MiTek <p>Current Task Name: "EPRO- Post Closing - Final Policy" New Task Name: "EPRO- Post Closing - Lender Request"</p> <p>Affected item(s): SSCORP5149.rpt - EPU Task Summary/Productivity by County Manager</p>			

[Back to Table of Contents](#)

EPU Task Summary/Productivity by Employee

New/Mod Change Request	Requested By Reports	Incident No.	TFS No. 864870
Updated as follows:			
<p>1. CO:</p> <ul style="list-style-type: none"> a. Add column for the "Order CIC Docs Received" task to the "CO-All EPU Tasks" column display option b. Add new Tasks for MiTek <p>Current Task Name: "EPRO- Post Closing - Final Policy" New Task Name: "EPRO- Post Closing - Lender Request"</p> <p>Affected item(s): SSCORP5150.rpt - EPU Task Summary/Productivity by Employee</p>			

[Back to Table of Contents](#)

EPU Trends

New/Mod Change Request	Requested By Reports	Incident No.	TFS No. 865052
Updated as follows:			
<p>1. CO:</p> <ul style="list-style-type: none"> a. Add column for the "Order CIC Docs Received" task to the "CO-All EPU Tasks" column display option b. Add new Tasks for MiTek <p>Current Task Name: "EPRO- Post Closing - Final Policy" New Task Name: "EPRO- Post Closing - Lender Request"</p> <p>Affected item(s): SSCORP5152.rpt - EPU Trends</p>			

[Back to Table of Contents](#)



FLORIDA

DOCUMENTS

Escrow

<i>Affidavit (Homestead)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	LandCastle Title	INC250206658	866407
Updated to the version most recently provided by state counsel.			
Affected item(s): FLD1101.doc - Affidavit (Homestead)			

[Back to Table of Contents](#)

<i>Homestead Affidavit Checklist</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FL State Counsel		866436
Updated the amount in item 7 to \$100,000.00.			
Affected item(s): FLD1413.doc - Homestead Affidavit Checklist			

[Back to Table of Contents](#)

Smartview Accounting Forms

New/Mod Mod	Requested By	Incident No.	TFS No.
<p>This release includes:</p> <p>RESOLVED: Entry for the generation of the Single Ledger Balance and Disbursement Summary written to the queue table prematurely.</p> <p>RESOLVED: Entry for the generation of the Single Ledger Balance and Disbursement summary written to the queue table prematurely – Ledger issue.</p>			

[Back to Table of Contents](#)



HAWAII

DOCUMENTS

Escrow

<i>Letter (Controlled Business Arrangement Discl)</i>			
New/Mod Change Request	Requested By TG HI	Incident No.	TFS No. 866386
Various updates; please render to view.			
Affected item(s): HID1176.doc - Letter (Controlled Business Arrangement Discl)			

[Back to Table of Contents](#)



ILLINOIS

DOCUMENTS

Escrow

<i>Cashier's Check Requests (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT and FT Metro	INC250196335	866082
Updated to ask for the check to emailed instead of faxed. Updated to replace Kathy Isadore with Amy Fanucchi for CT Metro's version. Updated address on FT Metro version. Please render both versions to view details.			
<u>Affected item(s):</u> ILD0119.doc - Cashier's Check Request ILD0439.doc - Cashier's Check Request (CT Metro)			

[Back to Table of Contents](#)



RELEASE NOTES

JUNE 2025

Title

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

New/Mod Change Request	Requested By IL State Counsel	Incident No.	TFS No. 865322
----------------------------------	---	---------------------	--------------------------

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

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

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

2006 ALTA Loan:

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

2021 ALTA Loan:

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

2006 ALTA Owner's:

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

2021 ALTA Owner's:

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

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

[Back to Table of Contents](#)

REPORTS

<i>Closing Calendar</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	MW IT		863969
<p>Updated as follows:</p> <ol style="list-style-type: none"> 1. Changed the "Show Broker Name" checkbox to a dropdown to show different column layout when brokers names are included: <ol style="list-style-type: none"> a. NONE = Default b. "Show Broker Names & Lender" = current column layout c. "Show Broker Names, Buyers and Sellers" = Updates layout to make room, including removal of Lender/Lender Contact <p>Affected item(s): SSCORP5271.rpt - Closing Calendar</p>			

[Back to Table of Contents](#)

<i>Opened/Closed Orders by {Selection}</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Metro Admin		860428
<p>For IL and WI, added a column to the end of both Excel exports (Opened and Closed) that shows whether Order.AppAttySplitFNF_FNFIL# is checked (Yes) or not checked (No).</p> <p>Affected item(s): SSCORP5154.rpt - Opened/Closed Orders by {Selection}</p>			

[Back to Table of Contents](#)



INDIANA

DOCUMENTS

Escrow

<u>Closing Confirmation (LT)</u>			
New/Mod Change Request	Requested By CT IN	Incident No. INC250212497	TFS No. 866453
Prompts removed for CT\FCTM operations.			
Affected item(s): IND1022.doc - Closing Confirmation (LT)			

[Back to Table of Contents](#)



KANSAS

DOCUMENTS

Title

<i>ALTA 25-06 - Same as Survey - CT KANSAS CITY ONLY</i>			
<i>ALTA 25.1-06 - Same as Portion of Survey - CT KANSAS CITY ONLY</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Kansas City		865499
CT KANSAS CITY ONLY: When proforma, the user will receive a prompt with the option to show (or not show) the 'last revised' date language with a blank line when the last revised date is not filled in. (This will still drop off if non-proforma and the last revised date is not filled in.)			

[Back to Table of Contents](#)



LOUISIANA

DOCUMENTS

Title

<i>Withdrawn ALTA Forms to be REMOVED, per LATISSO Filing</i>			
New/Mod Change Request	Requested By LA State Counsel	Incident No.	TFS No. 865822
<p>At the direction of state underwriting counsel, as per LATISSO Form filing, the following ALTA forms have been Withdrawn and are being removed from availability:</p> <ul style="list-style-type: none"> • ALTA Loan Policy - LA 6/17/06 • ALTA Owner's Policy - LA 6/17/06 • ALTA Homeowner's Policy - LA 12/02/13 • ALTA Expanded Coverage Residential Loan Policy - LA 12/02/13 • ALTA Short Form Expanded Coverage Residential Loan Policy - LA 7/26/10 • ALTA Residential Limited Coverage Mortgage Modification Policy - LA 12/01/14 • ALTA Commitment for Title Insurance - Modified LA 6/17/06 			

[Back to Table of Contents](#)



MASSACHUSETTS

DOCUMENTS

Title

<i>Pending Disbursement Endorsement</i>			
New/Mod Change Request	Requested By MA Agency	Incident No.	TFS No. 866796
As per state underwriting counsel approval, the Pending Disbursement endorsement has been modified with updated language.			

[Back to Table of Contents](#)



REPORTS

<i>Order Exceptions</i>			
New/Mod Fix	Requested By GA Agency	Incident No.	TFS No. 865821
Added MA to the Exceptions Function.			
Affected item(s): SSCORP5160.rpt - Order Exceptions			

[Back to Table of Contents](#)



MARYLAND

DOCUMENTS

[Escrow](#)

<i>Wire Information</i>			
New/Mod Change Request	Requested By MD Agency	Incident No. INC250176028	TFS No. 864594
Updated to pull T contact information and pull the Account Name from the file.			
Affected item(s): SSCORPD1807.doc - Wire Information SSCORPD5330.doc - Wire Information (International)			

[Back to Table of Contents](#)



MISSOURI

DOCUMENTS

Escrow

<i>Letter (Transaction Confirmation)</i>			
New/Mod Change Request	Requested By St. Louis	Incident No. INC250190733	TFS No. 865542
Updated to that the signor is always the Escrow Officer.			
Affected item(s): SSCORPD5832.doc - Letter (Transaction Confirmation)			

[Back to Table of Contents](#)



RELEASE NOTES

JUNE 2025

Title

ALTA 25-06 - Same as Survey - CT KANSAS CITY ONLY

ALTA 25.1-06 - Same as Portion of Survey - CT KANSAS CITY ONLY

New/Mod
Change Request

Requested By
CT Kansas City

Incident No.

TFS No.
865499

CT KANSAS CITY ONLY:

When proforma, the user will receive a prompt with the option to show (or not show) the 'last revised' date language with a blank line when the last revised date is not filled in. (This will still drop off if non-proforma and the last revised date is not filled in.)

[Back to Table of Contents](#)



MONTANA

DOCUMENTS

Escrow

<i>Commission Clarification and Information Request</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Great Falls		865539
Added prompt to exclude questions.			
Affected item(s): MTD0247.doc - Commission Clarification and Information Request			

[Back to Table of Contents](#)



NEBRASKA

DOCUMENTS

Title

<i>ALTA 25-06 - Same as Survey - CT KANSAS CITY ONLY</i>			
<i>ALTA 25.1-06 - Same as Portion of Survey - CT KANSAS CITY ONLY</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Kansas City		865499
CT KANSAS CITY ONLY: When proforma, the user will receive a prompt with the option to show (or not show) the 'last revised' date language with a blank line when the last revised date is not filled in. (This will still drop off if non-proforma and the last revised date is not filled in.)			

[Back to Table of Contents](#)



NEVADA

DOCUMENTS

Escrow

<i>Affidavit (Owner's - Commercial)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	NCS FNT NV	INC250206430	866376
Added functionality to only render the buyer/borrower's signatures for refinance files.			
Affected item(s): NVD1321.doc - Affidavit (Owner's - Commercial)			

[Back to Table of Contents](#)

<i>Affidavit Revisions (5)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	TT Reno	INC250177308	864603
New prompt to include the NRS language.			
Affected item(s): NVD1001.doc - Affidavit (Death of Trustee) NVD1002.doc - Affidavit (Terminating Joint Tenancy) NVD1041.doc - Affidavit (Death of Registered Domestic Partner) NVD1043.doc - Affidavit (Terminating Community Property with Right of Survivorship) NVD1053.doc - Affidavit (Death of Grantor)			

[Back to Table of Contents](#)

<i>Declaration of Value</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT NV	INC250201567	866379
The "Single Family Residence" checkbox will be marked in cases of "Multi-family Residence".			
Affected item(s): NVD1028.doc - Declaration of Value			

[Back to Table of Contents](#)

<i>EI - Interest Bearing Accounts</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Las Vegas; FNT NCS AZ	INC250171909	864559
Setup fee has been hardcoded to \$75.00 for CT NV users.			
A new prompt has been added for NCS AZ users to choose the bank and the address will pull automatically.			
Affected item(s): SSCORPD1844.doc - EI - Interest Bearing Account Instructions (IBA)			

[Back to Table of Contents](#)



RELEASE NOTES

JUNE 2025

Letter (Request for Info - Indemnity)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Las Vegas		866382

Added prompt for document section to have ability to show up to 5 different documents.

Affected item(s):

NVD1032.doc - Letter (Request for Info - Indemnity)

[Back to Table of Contents](#)

Owner Info Request

New/Mod	Requested By	Incident No.	TFS No.
Change Request	NV EPUI		866374

Added dropdown custom field that will drive which fax number is presented on the document.

Affected item(s):

NVD1269.doc - Owner Info Request

[Back to Table of Contents](#)

Recording Instructions

New/Mod	Requested By	Incident No.	TFS No.
Change Request	TT NV	INC250161251	864592

Updated to prompt user for address and email information for the Deliver To loan policy section.

Affected item(s):

NVD1078.doc - Recording Instructions

[Back to Table of Contents](#)



REPORTS

<i>Transaction Form - Priority</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	NV Ops		865790
Updated Escrow Holder verbiage for NV			
Updated Verification title when Repeat Beneficiary checkbox is selected (changes to 'Verification - Repeat Beneficiary')			
In Verification section of Outgoing Wires:			
- 'Name of Authorized Person' changed to 'Verified with Name'			
- 'Wire Verifier Signature' changed to 'Verified by Name'			
<u>Affected item(s):</u>			
SSCORP5002.rpt - Transaction Form			

[Back to Table of Contents](#)



INTEGRATIONS

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

[Back to Table of Contents](#)



NEW YORK

DOCUMENTS

Escrow

<i>City of Kingston Transfer Tax - Community Preservation Fund</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	FNT Garden City/Riverhead	INC250164759	863994
New document, please render to view.			
Affected item(s): NYD1928.doc - City of Kingston Transfer Tax - Community Preservation Fund			

[Back to Table of Contents](#)

<i>Commercial Affidavit of Title and Gap Indemnity</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Albany	INC250142594	865159
Updated the NYS Lien law period for commercial property from 120 days to 8 months.			
Affected item(s): NYD1055.doc - Commercial Affidavit of Title and Gap Indemnity			

[Back to Table of Contents](#)

<i>Examination of Title Order Letter</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNT White Plains		866061
Updated email for where exams should be mailed. Removed the ALL TITLE CONTAINS line and added requirements. Please render to view details.			
Affected item(s): NYD1539.doc - Examination of Title Order Letter			

[Back to Table of Contents](#)

<i>New First Nationwide Documents</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	First Nationwide		864565
New documents. Please render to view in full.			
Affected item(s): NYD1929.doc - Agreement (Courtesy Payment) NYD1930.doc - Agreement (Courtesy Recording) NYD1931.doc - Agreement (Tax Prorations) NYD1932.doc - Bank Check Request NYD1933.doc - Certification of LLC NYD1934.doc - NY Reader Sheet NYD1935.doc - Letter (General Payment) NYD1936.doc - Letter (Tax Payment) NYD1937.doc - Letter (Tax Payment - State) NYD1938.doc - Payment Method Confirmation NYD1938.doc - Payment Method Confirmation (Buyer-Borrower) NYD1938.doc - Payment Method Confirmation (Seller) NYD1940.doc - Post Closing Disbursement Request NYD1941.doc - Earnest Money Release NYD1947.doc - Payment Method Request Confirmation			

[Back to Table of Contents](#)

<i>Commercial (CSS) Import Tool</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
<p>Installation of Commercial 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 CSS Import Tool uses the Lookup tables beginning with the name CSS Import Mapping as the mapping table between Excel workbook and Select Order fields.</p>			

[Back to Table of Contents](#)



REPORTS

<i>Invoice Statement</i>			
New/Mod Change Request	Requested By FNAT NY, CLT - FNT, CTI NY NCS	Incident No.	TFS No. 865648
Implemented miscellaneous updates to logic and formatting, per brand.			
Affected item(s): NYD5998.spdoc - Invoice Statement			

[Back to Table of Contents](#)

<i>NY Application</i>			
New/Mod Change Request	Requested By NY NCS Ops	Incident No.	TFS No. 863787
Added miscellaneous updates for NCS NY Ops and First Nationwide.			
Affected item(s): NYD1030.spdoc - Title Bill Application			

[Back to Table of Contents](#)

NORTH CAROLINA

MY SCREENS

Attorney Contact Screen

New/Mod Mod	Requested By Kenneth Stone	Incident No. INC250211456	TFS No.
-----------------------	--------------------------------------	-------------------------------------	----------------

The following fields changes occurred on the **Attorney Contact** screen.

REMOVED:

- > 13-Jacksonville
- > 18-Wilmington
- > 26-Morehead City

ADDED:

- > 18-Southeast

These changes are visible when the **My Screens > FT-NC Rep Maintenance** screen is selected.

The screenshot shows the 'Attorney' screen with various input fields. A red box labeled 'REMOVED' points to the fields for 13-Jacksonville, 18-Wilmington, and 26-Morehead City. A black box labeled 'ADDED' points to the 18-Southeast field. The screen also includes a 'Save And Add New' button and checkboxes for 'Include on revenue reports', 'Marketing source', and 'Commitment recipient'.

[Back to Table of Contents](#)



OHIO

DOCUMENTS

[Escrow](#)

<i>IBA Service Form (Capital One)</i>			
New/Mod Change Request	Requested By CT Cleveland/Toledo	Incident No. INC250190901	TFS No. 865161
Added additional signature.			
<u>Affected item(s):</u> OHD1484.doc - IBA Service Form (Capital One)			

[Back to Table of Contents](#)



OKLAHOMA

DOCUMENTS

Escrow

<i>Affidavit (for Title or Ownership of Land - Individual)</i>			
New/Mod Change Request	Requested By FirsTitle & Abstract Services	Incident No. INC250507539	TFS No. 866400
Updated to keep to one page.			
<u>Affected item(s):</u> OKD1327.doc - Affidavit (for Title or Ownership of Land - Individual)			

[Back to Table of Contents](#)



OREGON

DOCUMENTS

[Escrow](#)

Assignee Instructions			
New/Mod Change Request	Requested By Escrow Admin	Incident No.	TFS No. 866372
Removed page break that existed for OR's special language and initials.			
Affected item(s): SSCORPD5527.doc - Assignee Instructions			

[Back to Table of Contents](#)



REPORTS

<i>SPAdmin-Custom Source of Business Export</i>			
New/Mod Change Request	Requested By FNFi Rpt Admin	Incident No.	TFS No. 865242
Updated the County Manager name for LTC Portland			
Affected item(s): SSCORP5255.rpt – SPAdmin-Custom Source of Business Export			

[Back to Table of Contents](#)

<i>SPAdmin-Custom Source of Business Export-Missing Fields</i>			
New/Mod Change Request	Requested By FNFi Rpt Admin	Incident No.	TFS No. 865243
Updated the County Manager name for LTC Portland			
Affected item(s): SSCORP5268.rpt – SPAdmin-Custom Source of Business Export-Missing Fields			

[Back to Table of Contents](#)



PENNSYLVANIA

DOCUMENTS

Escrow

Owner Affidavits (9)			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	NCS		867669
Various changes applied per state counsel for Pittsburgh NCS. Please render to view in full.			
<p>Affected item(s): PAD1047.doc - Owner Affidavit (Individual) PAD1048.doc - Owner Affidavit (Administrator Executor or Guardian) PAD1049.doc - Owner Affidavit (Partnership - General or Limited) PAD1050.doc - Owner Affidavit (Corporation) PAD1051.doc - Owner Affidavit (LLC) PAD1052.doc - Owner Affidavit (Church) PAD1053.doc - Owner Affidavit (Authority) PAD1054.doc - Owner Affidavit (Non-Profit Corp.) PAD1055.doc - Owner Affidavit (Trust)</p>			

[Back to Table of Contents](#)



INTEGRATIONS

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

[Back to Table of Contents](#)



TEXAS

INTEGRATIONS

<i>Commercial (CSS) Import Tool</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
<p>Installation of Commercial 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 CSS Import Tool uses the Lookup tables beginning with the name CSS Import Mapping as the mapping table between Excel workbook and Select Order fields.</p>			

[Back to Table of Contents](#)



RELEASE NOTES

JUNE 2025

REPORTS

Dallas CPF Daily Summary

New/Mod	Requested By	Incident No.	TFS No.
Change Request	San Antonio CPF Admin		863763
Added StarTex to the Brand dropdown.			
Affected item(s): SSCORP5239.rpt - Dallas CPF Daily Summary			

[Back to Table of Contents](#)

Opened/Closed Orders by {Selection}

New/Mod	Requested By	Incident No.	TFS No.
Change Request	The Baker Firm VP		865839
Updated to suppress bill codes in the "Other" and "Referral" columns for NJ Baker profiles.			
Affected item(s): SSCORP5154.rpt - Opened/Closed Orders by {Selection}			

[Back to Table of Contents](#)

INTEGRATIONS

Rate Validation Tool

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

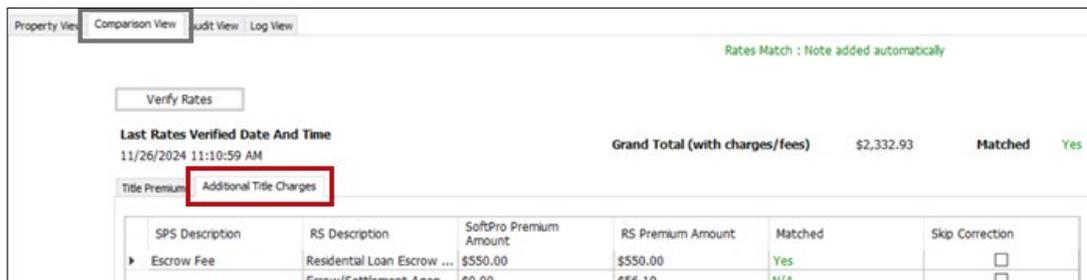
This release includes:

- › Upgrade to Feature 5.0

NOTE: This feature requires configuration. Reach out to FNFRatesTeam@softprocorp.com for a demo/configuration.

The ability to compare the escrow/ancillary supported charges from Rate Services to the charges being collected in the SoftPro order.

- › The **Comparison View** now includes a new tab, **Additional Title Charges**, which includes the escrow/ancillary supported charges from Rate Services. This tab is always visible but is only accessible when Feature 5.0 is enabled. Navigation between the **Title Premiums** and **Additional Title Charges** tabs is always available when applicable charges are being compared.



- › If escrow/ancillary supported charges,
 - Align with charges from Rate Services – the **Comparison View** tab continues to open on the **Title Premiums** tab.
 - Does not align with charges from Rate Services – the **Comparison View** tab opens on the **Title Premiums** tab with a **Pull** button (upper right) indicating which premium/charges do not match.



- **Pull Title & ATC Rates** - Title and Escrow/ancillary charges do not match
- **Pull Title Rates** - Only Title premiums do not match
- **Pull ATC Rates** - Only Escrow/ancillary charges do not match



Rate Validation Tool

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

- » Overwrite rates in Select order

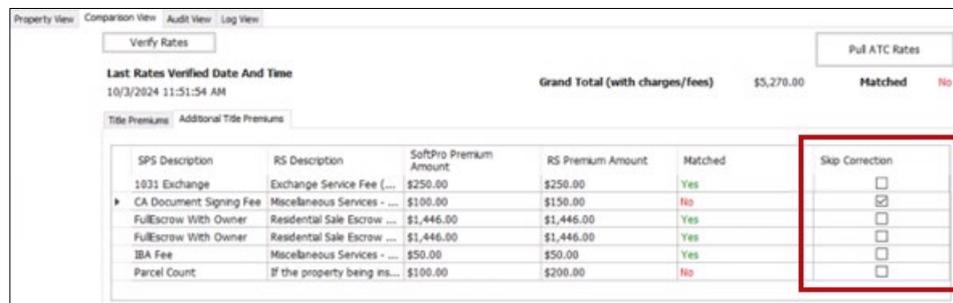
Clicking the **Pull** button, updates the SoftPro order by pulling in the corresponding rate(s) from Rate Services and quiets the utility if the order is in a re-verification state.

If you choose not to overwrite the Select rates, the **Verify Rates** button is still available to keep the rates and provide a justification.

- » Skipping Correction

The **Additional Title Premiums** tab allows the user to skip overwriting individual charges that do not match when using the **Pull** button.

Check the applicable entry to avoid overwriting the charge(s) in Select.



Related document: [Rates – Verifying Rates \(Title/End/ATC\) Using Rate Services](#)



WASHINGTON

DOCUMENTS

Escrow

<i>Closing Order and Recording Instructions nka Recording Instructions</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Seattle CPF		866070
Updated title.			
Affected item(s): WA00000367.doc - Recording Instructions			

[Back to Table of Contents](#)

<i>Cover Page for Recordings (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	PacNW System Admin		866072
Updated formatting to adjust the "Filed for record at the request of" so that the document will keep to one page.			
Affected item(s): WA0000018.doc - Cover Page for Recordings WA00001060.doc - Cover Page for Recordings (Letter Size)			

[Back to Table of Contents](#)

All Screens

New/Mod Mod	Requested By Penny Hoskins	Incident No.	TFS No.
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The Expressions have been modified to display the **Disbursement Date (DD)**,
This change is visible when one of the following **My Screens** is selected:

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

B/S: BuyerName/ Prop: 123 Main Street	DD: 7/10/2025	Refinance / Order Status: InProcess
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[Back to Table of Contents](#)

Checklist / Requested Tasks Screens

New/Mod Mod	Requested By Penny Hoskins	Incident No.	TFS No.
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The following screens have been added to the **Open Order/General** screen set:

- > **Checklist Tasks**
- > **Requested Tasks**

These changes are visible when one of the following **My Screens** is selected:

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

The screenshot shows the 'Open Order/General' sidebar on the left, with 'Checklist Tasks' and 'Requested Tasks' highlighted in red boxes. The main content area displays two task lists. The top list is titled 'Checklist Tasks' and the bottom list is titled 'Requested Tasks'. Both lists have a 'Settlement date/time' dropdown menu set to '07/06/2025 11:11 AM' and a checkbox for 'Estimated date/time'. Below each dropdown is a table with columns for 'Status', 'Task', 'Milestone', and 'Category'.

[Back to Table of Contents](#)



RELEASE NOTES

JUNE 2025

REPORTS

Daily Order Activity

New/Mod	Requested By	Incident No.	TFS No.
New Request	CT Bellingham		865855
New Report for CT Bellingham			
Affected item(s): SSCORP5623.rpt - Daily Order Activity			

[Back to Table of Contents](#)

Revenue by Sales Rep

New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Everett / PacNW IT		866080
Updated to include TP + END + NBE in the Title Revenue			
Affected item(s): SSCORP5233.rpt - Revenue by Sales Rep			

[Back to Table of Contents](#)



WISCONSIN

DOCUMENTS

Escrow

<i>Personal Undertaking (Delayed Production of Waivers)</i>			
New/Mod Change Request	Requested By CT WI	Incident No. INC250194445	TFS No. 866068
Updated to have the General Contractor sign instead of the borrower.			
Affected item(s): WID0329.doc - Personal Undertaking (Delayed Production of Waivers)			

[Back to Table of Contents](#)



REPORTS

Closing Calendar

New/Mod Change Request	Requested By MW IT	Incident No.	TFS No. 863969
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Updated as follows:

1. Changed the "Show Broker Name" checkbox to a dropdown to show different column layout when brokers names are included:
 - a. NONE = Default
 - b. "Show Broker Names & Lender" = current column layout
 - c. "Show Broker Names, Buyers and Sellers" = Updates layout to make room, including removal of Lender/Lender Contact

Affected item(s):

SSCORP5271.rpt - Closing Calendar

[Back to Table of Contents](#)

Opened/Closed Orders by {Selection}

New/Mod Change Request	Requested By CT Metro Admin	Incident No.	TFS No. 860428
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For IL and WI, added a column to the end of both Excel exports (Opened and Closed) that shows whether Order.AppAttySplitFNF_FNFIL# is checked (Yes) or not checked (No).

Affected item(s):

SSCORP5154.rpt - Opened/Closed Orders by {Selection}

[Back to Table of Contents](#)



ALMA TITLE

DOCUMENTS

Escrow

ALMA Document Revisions (3)			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	ALMA		864599
Various changes per request; please render to view.			
Affected item(s): COMD1310.doc - Title Update - Bringdown Report COMD1311.doc - Ownership and Encumbrance Report (Current Owner) COMD1312.doc - Foreclosure Report (Two Owner)			

[Back to Table of Contents](#)



LIBERTY TITLE

DOCUMENTS

Escrow

<i>Closing Confirmation (IL)</i>			
New/Mod Change Request	Requested By Liberty Title	Incident No. INC250203360	TFS No. 866078
Added Veronica Maldonado to the PLEASE SEND CLOSING PACKAGES AND CD REQUESTS TO section.			
Affected item(s): LIBD1124.doc - Closing Confirmation (IL)			

[Back to Table of Contents](#)

MA AGENCY

MY SCREENS

Commitment – Schedule A Screen

New/Mod Mod	Requested By Roberta Stone	Incident No. INC250211456	TFS No.
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The following fields changes occurred on the **Commitment – Schedule A** screen.

CHANGED:

- > Label changed from **Title Reference Long** to **No. 5 Property Reference**

REMOVED:

- > **Grantor**
- > **Dated**
- > **Recording Information**
- > **Requirements shown in this commitment must be met within**
- > **Prepared For**
- > **Witness Clause**

These changes are visible when the **My Screens > MA Agency Screens** is selected.

The screenshot shows the 'Commitment - Schedule A' form. At the top, there are navigation arrows and the title 'Commitment - Schedule A'. Below this, there are fields for 'Effective Date' (set to '(None)') and 'Effective Time' (set to '(None)'). A section titled 'Commitments/Prelims (1)' is visible, with a red box labeled 'REMOVED' pointing to the 'Grantor' field. Below this, there are fields for 'Grantor', 'Dated' (set to '(None)'), and 'Recording Information'. The 'Title Reference Long' field is highlighted with a red box labeled 'CHANGED to: No. 5 Property Reference'. A large red box encompasses the 'Requirements shown in this commitment must be met within' field, the 'Prepared For' table (with columns 'Code' and 'Name'), and the 'Witness Clause' section. The 'Countersignature' field is at the bottom.

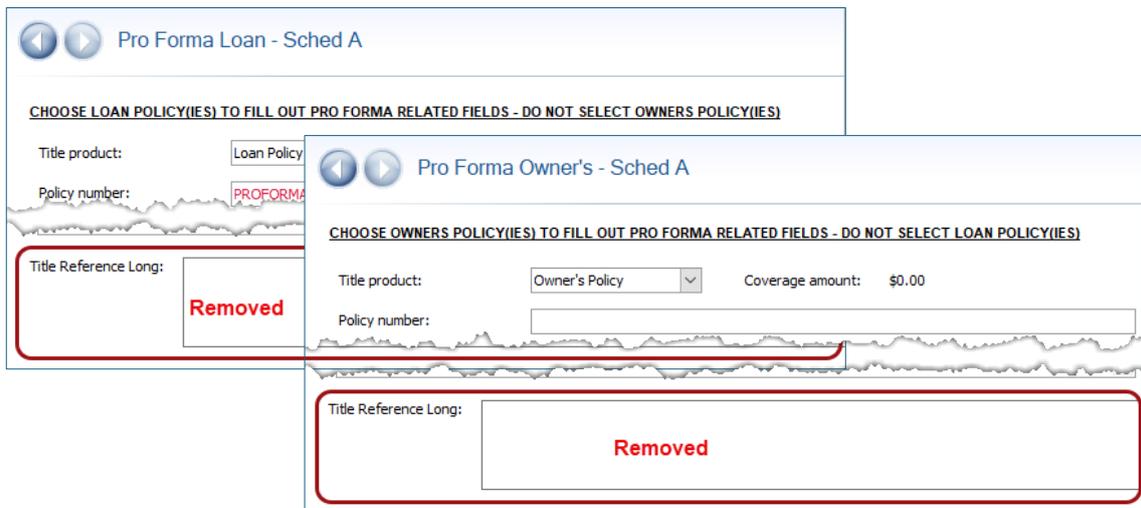
Pro Forma [Loan / Owner's] – Sched A Screens

New/Mod Mod	Requested By Roberta Stone	Incident No. INC250211456	TFS No.
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The **Title Reference Long** field has been **removed** from the following screens:

- > **Pro Forma Loan – Sched A**
- > **Pro Forma Owner's – Sched A**

This change is visible when the **My Screens > MA Agency Screens** is selected.



[Back to Table of Contents](#)



NCS

DOCUMENTS

Escrow

<i>IBA Authorization (ATL)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	NCS Atlanta		865537
Updated interest from 3.9% to 3.4%.			
Affected item(s): COMD1031.doc - IBA Authorization (ATL)			

[Back to Table of Contents](#)

<i>Indemnity Personal Undertaking ML Exceptions 2024</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	NCS - Pittsburgh	INC230204924	867913
Changes for NCS Pittsburgh only: Updated so only 2 blank signatories are available instead of pulling contacts from the file for the signature section.			
Affected item(s): SSCORPD5780.doc - Indemnity Personal Undertaking ML Exceptions 2024			

[Back to Table of Contents](#)

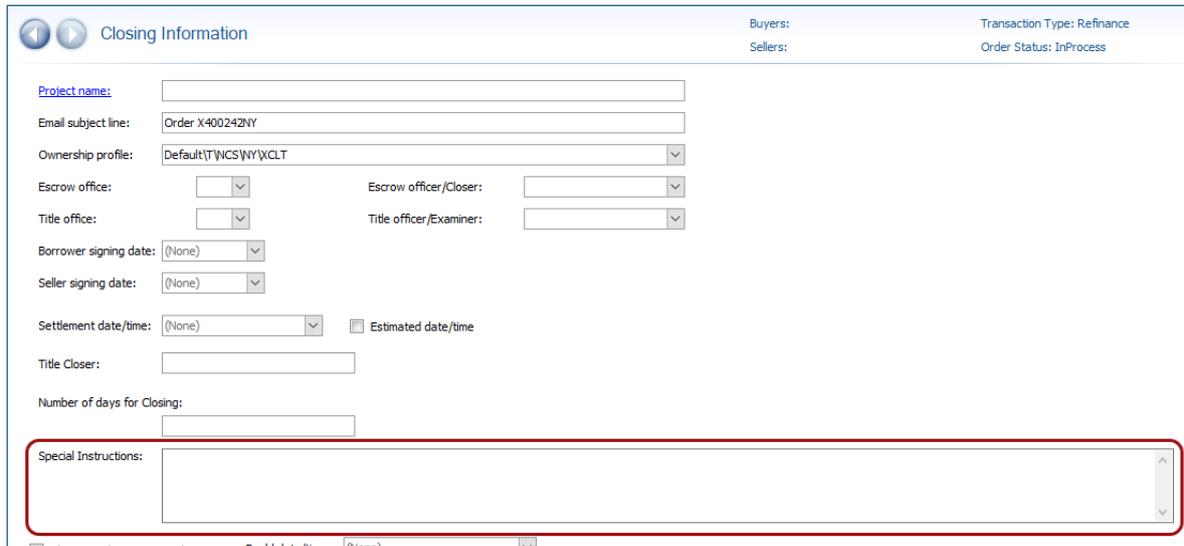
MY SCREENS

Closing Information Screen

New/Mod Mod	Requested By Nancy Hesse	Incident No.	TFS No.
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The **Special Instructions** field has been added to the **Closing Information** screen.

This change is visible when the **My Screens > NY NCS Screens** is selected.



The screenshot shows the 'Closing Information' screen with the following fields and values:

- Project name: [Empty]
- Email subject line: Order X400242NY
- Ownership profile: Default\T\WCS\WY\XCLT
- Escrow office: [Dropdown]
- Escrow officer/Closer: [Dropdown]
- Title office: [Dropdown]
- Title officer/Examiner: [Dropdown]
- Borrower signing date: (None)
- Seller signing date: (None)
- Settlement date/time: (None) [Checked] Estimated date/time
- Title Closer: [Empty]
- Number of days for Closing: [Empty]
- Special Instructions:** [Newly added text area, highlighted with a red box]

[Back to Table of Contents](#)

Document Recording Screen

New/Mod Mod	Requested By Nancy Hesse	Incident No.	TFS No.
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The following field changes have been made to the **Document Recording** screen.

REMOVED:

- > **No. of Pages**
- > **Date Rejected Original**
- > **Recorded document to client**
- > **Recorded at/in**
- > **Place Re-Recorded**

CHANGED:

- > Label changed from **Rejected document returned to** to **Recorded document returned to**

ADDED:

- > **Date Recorded**

These changes are visible when the **My Screens > NY NCS Screens** is selected.

The screenshot shows the 'Document Recording' interface. At the top, there are navigation arrows and the title 'Document Recording'. Below this, there are sections for 'Deeds (0)', 'To Parties', and 'From Parties'. The 'Document Recording Notes' section is highlighted with a red box and contains the following fields:

- To Follow
- On Hold
- Document Type:
- Document Date:
- Date Recorded:
- Hold date:
- Date Rejected:
- Recorded document returned to:
- Doc Description:
- Date Submitted:
- Date Resubmitted:
- Place Recorded:

[Back to Table of Contents](#)

Escrow Agreement Screen

New/Mod New	Requested By Roberta Stone	Incident No.	TFS No.
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The **Escrow Agreement** screen has been added to the **Document Preparation** screen group.

This change is visible when the **My Screens > CO-UT NCS Screens** screen is selected.

The screenshot displays the 'Escrow Agreement' screen. On the left, a navigation pane lists various document preparation categories. 'Document Preparation' is selected, and 'Escrow Agreement' is highlighted with a red box. The main content area is titled 'Escrow Agreement' and contains several input fields and dropdown menus. Fields include 'Funds to be paid to', 'Funds provided by', 'Funds administered by', and 'Funds held by', each with a dropdown menu. Date fields for 'Agreement date', 'Completion date', and 'Private contract date' are set to '(None)'. There are also fields for 'Amount held', 'Account information', 'Escrow fee', 'Line', and 'Bill code'. Text areas for 'Terms & conditions' and 'Additional instructions' are present. A 'Custom Fields' section is located at the bottom of the main area.

[Back to Table of Contents](#)

Order Entry / Data Screen

New/Mod Mod	Requested By Roberta Stone	Incident No.	TFS No.
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The **Due Diligence** field has been added to the **Order Entry / Data** screen.

This change is visible when the **My Screens > CO-UT NCS Screens** screen is selected.

◀ ▶
Order Entry / Data

Transaction type

Purchase

Refinance

Equity

Other

Commercial

Construction

Cash sale

Out of county

Order type: Title & Escrow

Product type: Purchase/Resale

Policy type: Simultaneous

[Additional Description:](#)

Closing Type / Rate:

Escrow office: A

Escrow officer/Closer:

Pre-closer/Escrow assistant:

Title office: T

Title officer/Examiner:

2nd Escrow Officer: 2nd EO Percent: %

Related order(s):

[Project name:](#)

Due date/time: (None)

Contract date: (None) Days Until Closing:

Date of Settlement: (None) Time of Settlement: (None)

Due Diligence: (None)

Sales price: Line: TC.01 CSS Purchase Price

[Back to Table of Contents](#)

Property Screen

New/Mod Mod	Requested By Nancy Hesse	Incident No.	TFS No.
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The **Qualifier** field has been added to the **Property** screen.

This change is visible when the **My Screens > NY NCS Screens** is selected.

The screenshot shows the 'Property' screen interface. At the top, there are navigation arrows and the title 'Property'. Below this is a section titled 'Properties (1)' with a dropdown menu showing 'Property: 1'. A table with columns 'Property Address', 'Site Number/Name', and 'City/State/Zip' is visible, with a row containing the number '1'. Below the table, there is a 'Subdivision/Tract:' field. Further down are several input fields: 'HOA:' with a dropdown, 'HOA Management Co.:' with a dropdown, 'District:', 'SWIS code:', 'Base Lot:', 'Site number:', and 'Site name:'. The 'Qualifier:' field is highlighted with a red rectangular box. Below it is the 'Unit/Condo number(s):' field with an asterisk, and at the bottom, the 'Building:' field.

[Back to Table of Contents](#)

Survey Screen

New/Mod Mod	Requested By Nancy Hesse	Incident No.	TFS No.
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The following changes have been made to the **Survey** screen for **Surveyor 1 – Surveyor 4**:

CHANGED:

- › Label changed for check box from **Received** to **Accepted**

ADDED:

- › **Survey [#] Quote Request** section with the following fields
 - » **Quote Type**
 - » **Quote Amount**
 - » **Quote Requested**
 - » **Quote Received**
- › **Survey [#] Request** section with the following fields
 - » **Date Ordered**
 - » **Due Date**
 - » **Notes**
 - » **Instructions**
 - » **Date Received**
 - » **Access Info**

REMOVED:

- › **Survey [#] Update** section
 - » **Accepted** check box
 - » **Notes**

These changes are visible when the **My Screens > NY NCS Screens** is selected.

The screenshot shows the 'Survey' screen with the following sections and fields:

- Property:** 1
- Accepted Bid:** [input field]
- Survey Fee:** [input field]
- Surveyor 1 Contact Details:**
 - Accepted** (highlighted with a red box)
 - Surveyor:** [input field]
 - Name:** [input field]
- Surveyor 1 Quote Request** (highlighted with a red box):
 - Quote Type:** [dropdown menu]
 - Quote Requested:** [dropdown menu with (None) selected]
 - Quote Amount:** [input field]
 - Quote Received:** [dropdown menu with (None) selected]
- Surveyor 1 Request** (highlighted with a red box):
 - Date Ordered:** [dropdown menu with (None) selected]
 - Instruction:** [dropdown menu]
 - Due Date:** [dropdown menu with (None) selected]
 - Date Received:** [dropdown menu with (None) selected]
 - Notes:** [text area]
 - Access Info:** [text area]
- Surveyor 1 Update** (highlighted with a red box):
 - Update Order Date:** [dropdown menu with (None) selected]
 - Update Amount:** [input field]
 - Update due:** [dropdown menu with (None) selected]
 - Update Received:** [dropdown menu with (None) selected]

[Back to Table of Contents](#)

REPORTS

<i>Closing Calendar</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	MW IT		863969
Updated as follows:			
<ol style="list-style-type: none"> 1. Changed the "Show Broker Name" checkbox to a dropdown to show different column layout when brokers names are included: <ol style="list-style-type: none"> a. NONE = Default b. "Show Broker Names & Lender" = current column layout c. "Show Broker Names, Buyers and Sellers" = Updates layout to make room, including removal of Lender/Lender Contact 2. For NCS NY - FNT - Custom Brief Excel Option, added Status column at the end of the report. 			
Affected item(s):			
SSCORP5271.rpt - Closing Calendar			

[Back to Table of Contents](#)

<i>Escrow Closing Log</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CLT SW NCS		863769
Added Settlement Date under the Order Number, and a column to the Excel export for NCS.			
Affected item(s):			
SSCORP5346.rpt - Escrow Closing Log			

[Back to Table of Contents](#)

<i>Invoice Statement</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNAT NY, CLT - FNT, CTI NY NCS		865648
Implemented miscellaneous updates to logic and formatting, per brand.			
Affected item(s):			
NYD5998.spdoc - Invoice Statement			

[Back to Table of Contents](#)

<i>NCS Commissions by Selection</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	NCS NY		863316
Converted the Excel checkbox to a dropdown and added:			
<ol style="list-style-type: none"> a. NONE = Default b. Excel - Standard c. Excel - NY 			
Affected item(s):			
SSCORP5369.rpt - NCS Commissions by Selection			

[Back to Table of Contents](#)



RELEASE NOTES

JUNE 2025

NY Application

New/Mod	Requested By	Incident No.	TFS No.
Change Request	NY NCS Ops		863787
Added miscellaneous updates for NCS NY Ops and First Nationwide.			
Affected item(s): NYD1030.spdoc - Title Bill Application			

[Back to Table of Contents](#)

Order Count/Revenue Summary

New/Mod	Requested By	Incident No.	TFS No.
Change Request	NCS FNT NY		865842
For SoCal: Added another option, 'Yes-Remove END and SUB', to the 'Show revenue amounts:' drop-down.			
This will exclude END and SUB from all Revenue.			
Affected item(s): SSCORP5092.rpt - Order Count/Revenue Summary			

[Back to Table of Contents](#)

Production Status List

New/Mod	Requested By	Incident No.	TFS No.
New Request	NCS NY CLT		865940
New report for NCS NY CLT.			
Affected item(s): SSCORP5625.rpt - Production Status List			

[Back to Table of Contents](#)