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Table of Contents

ARTA Lending Version 2018.4	1
New Release Best Practices	1
Release Notes	1
Program Changes	2
HMDA/Loan Application Register (LAR)	2
HMDA/Partially Exempt per Senate Bill 2155	2
HMDA/Print HMDA Wiz Data	4
Homeownership Counseling Service Document	4
NDAS Loans – Variable Rate	4
Transfer from ARTA Lending to ComplianceOne mortgage	5
VMP81 (Government Monitoring Data Collection Form)	5
Other Program Changes	5
OneSumX Certification of Beneficial Owner(s)	5
Multi-State Form Changes	5
COMM-NOTE COMM-NOTE (IL, MD, MO, OH, PA, SC, VA, VT, WI)	5
NDAS-SI-XX (Simple Interest Note, Disclosure and Security Agreement for DC, DE, FL, GA, HI, ID, IL, KS, KY, LA, MA, MD, ME, MI)	5
Additional Changes for Maine	6
Request for Transcript of Tax Return (4506-T) (VMP9045T)	6
State-Specific Form Changes	7
California	7
COMM-AGREE (Loan Agreement Commercial) (CA)	7
Colorado	7
NDAS-SI-CO (Simple Interest Note, Disclosure, and Security Agreement) (CO)	7
Georgia	7
Recording Cover Sheet (VMP368CGA) (GA)	7
Indiana	7
NDAS-SI-IN (Simple Interest Note, Disclosure and Security Agreement) (IN)	7
North Dakota	7
AGCO-RESI-ND (Agricultural/Commercial Real Estate Security Instrument) (ND)	7
AGCO-RESI-ND (Real Estate Security Instrument Agricultural Commercial) (ND) MMOD-ND (Modification Of Real Estate Security Instrument) (ND) OCP-REMTG-ND (Open End Credit Plan Real Estate Security Instrument) (ND) RE-MTG-ND (Real Estate Security Instrument) (ND) SUB-LLSB-ND (Subordination Agreement Landlord Lien) (ND) VMPC665ND (Open End Credit Plan Real Estate Security Instrument With MERS) (ND) VMP995WND (Assignment of Mortgage) (ND)	7
Oregon	8
EFS-3-ADD-OR (Effective Financing Statement Addendum) (OR)	8
Texas	8
UN-TX (Universal Note) (TX) UNS-LAZ-TX (Universal Note and Security Agreement) (TX)	8
Wisconsin	8

ASMT-RENT-WI (Assignment of Leases and Rents) (WI) SUB-RESB-WI (Real Estate Lien Subordination Agreement) (WI)	8
Wyoming	8
EFS-1-LAZ-WY (Effective Financing Statement) (WY)	8
EFS-3-LAZ-WY (Effective Financing Statement Amendment) (WY)	9
Additional Resources	9
ARTA Lending Application Training	9
Online Training	9
Handouts and Guides	9
Compliance Resources	10
Upgrade Information	10
Solution Notification Service Available	10
How to Contact Wolters Kluwer Support	11
Web Site or E-Mail	11
Phone: 1.800.274.2711	11
Fax 1.800.860.3595	11
Write	11
Authorization Codes	11

ARTA Lending Version 2018.4

New Release Best Practices

- We encourage users to upgrade promptly.
- Process as many of your work list items as possible prior to upgrading to the new version. Having a minimal number of pending items in Application, Loan Decision, and Loans work lists will help streamline the update.
- Review your templates when indicated in a release note and complete the applicable tasks:
 - Add new documents to applicable templates when new document(s) are added to a release.
 - Remove previous version of the document(s).
 - Remove old versions and add back updated document(s). If a template includes a revised document, remove the document and add the document back to ensure the application incorporates the changes.
 - If a drop-down menu item was added or changed, select a different item in the drop-down list, save the template, then reselect the appropriate item.

Release Notes

This Release Notes document provides information about what's new or changed for this ARTA Lending release. You can find the most recent version of the Release Notes on the Solutions Support web site at <http://www.WoltersKluwerFS.com/Support/>.

Program Changes

HMDA/Loan Application Register (LAR)

Previously, when printing the HMDA Loan Application Register (LAR) report reserved values for applicant age (8888=Not applicable) and credit score (7777=Credit score is not a number, 8888=Not applicable) wouldn't print. The same thing applied to the co-applicant age (8888=Not applicable, 9999=No co-applicant) and credit score (7777=Credit score is not a number, 8888=Not applicable, 9999=No co-applicant). Changes have been made to the program to resolve this issue and the LAR report now correctly handles both the specific values and the reserved values.

HMDA/Partially Exempt per Senate Bill 2155

The Bureau of Consumer Financial Protection issued an interpretive and procedure rule on August 31, 2018 to implement and clarify the Economic Growth, Regulatory Relief, and Consumer Protection Act (S. 2155). This rule amends HMDA to create partial exemptions applicable to transactions with an **Action Taken Date** on or after 1/1/2018. Organizations that are partially exempt have the option of reporting exempt data, at their discretion.

This rule change impacts the HMDA reporting process within ARTA Lending. To support the requirements for this new tier of HMDA reporters several changes have been made to the program.

On the Criteria screen a checkbox for "**Partially Exempt per S. 2155**" has been added. This checkbox is enabled when **HMDA Reportable** is selected.

The screenshot shows the ARTA - Doe software interface. The left sidebar contains a list of criteria: Criteria, Applicant, Fees, Calculations, Assets/Liabilities, Income/Expenses, Application Documents (UCA, VMP-1525P, VMP-96D, APP-SUMRPT), Print, and Tracking. The main area displays the 'Criteria' screen with various settings. Under 'Profiles', 'Lending policy profile' is set to 'AK POLICY' and 'Lender profile' is '11 TEST LENDER NAME'. Under 'Loan purpose', 'Consumer / Family / Household' is selected. Under 'MLA Covered Borrower', the checkbox 'Applicant is a covered borrower under the Military Lending Act (32 CFR Part 232) and the collateral securing the loan is not excluded from the rule.' is checked. Under 'Open end credit', 'Open end credit' is checked. Under 'Secured by', 'Other collateral' is selected. Under 'HMDA Reporting', 'HMDA Reportable' is selected, and the 'Partially Exempt per S. 2155' checkbox is checked and highlighted with a red box. Under 'Credit Request', 'Credit type' is set to 'Individual credit - applicant income only'. The status bar at the bottom shows 'Ready' and 'NUM'.

On existing transactions, the **Partially Exempt per S. 2155** checkbox will default unselected but is editable.

If you are licensed for the HMDA Wiz interface, any existing transaction with an **Action Taken Date** on or after 1/1/2018 will need to be updated if you are a partially exempt lender. Those existing transactions can be updated using the Grid view on the Edit page within HMDA Wiz.

The **Partially Exempt per S. 2155** flag will be included on the **HMDA LAR Record** report. When the flag is true an asterisk will appear next to all 36 fields that can be reported as exempt. A footnote at the bottom of the report will state: "This field is included in the list of partially exempt fields under Senate Bill 2155 and may include a special exempt code (1111 or Exempt) when reporting to the Bureau of Consumer Financial Protection." Keep in mind that the **HMDA LAR Record** report assumes all 36 fields will be reported as exempt. However, within the HMDA Wiz product you will be given the option to specify at an institution level which of the 36 fields you do not wish to report as exempt. Reporting features within HMDA Wiz will consider your institution's settings and apply the exempt value at that time.

Partially Exempt Lenders may, at their option, continue to report exempt data. If the Partially Exempt Lender reports all data fields within a group; then a Partially Exempt Lender may choose to report on some exempt data fields without reporting on other exempt data fields. For example, the data fields for Property Address are street address, city, state and zip code. If a Partially Exempt Lender reports any Property Address field, that lender must report all Property Address data fields; except for the state, which is not an exempt data field.

The 36 Partially Exempt LAR fields impacted by S. 2155 are listed in the table below.

	LAR Field Number and Description	Exempt value
1.	13. Street Address	Exempt
2.	14. City	Exempt
3.	16. Zip Code	Exempt
4.	59. Rate Spread	Exempt
5.	62. Credit Score of Applicant or Borrower	1111 = Exempt
6.	63. Credit Score of Co-Applicant or Co-Borrower	1111 = Exempt
7.	64. Applicant or Borrower, Name and Version of Credit Scoring Model	1111 = Exempt
8.	66. Co-Applicant or Co-Borrower, Name and Version of Credit Scoring Model	1111 = Exempt
9.	68. Reason for Denial: 1	1111 = Exempt
10.	73. Total Loan Costs	Exempt
11.	74. Total Points and Fees	Exempt
12.	75. Origination Charges	Exempt
13.	76. Discount Points	Exempt
14.	77. Lender Credits	Exempt
15.	78. Interest Rate	Exempt
16.	79. Prepayment Penalty Term	Exempt
17.	80. Debt-to-Income Ratio	Exempt
18.	81. Combined Loan-to-Value Ratio	Exempt
19.	82. Loan Term	Exempt
20.	83. Introductory Rate Period	Exempt
21.	84. Balloon Payment	1111 = Exempt
22.	85. Interest-Only Payments	1111 = Exempt
23.	86. Negative Amortization	1111 = Exempt
24.	87. Other Non-Amortizing Features	1111 = Exempt
25.	88. Property Value	Exempt
26.	89. Manufactured Home Secured Property Type	1111 = Exempt
27.	90. Manufactured Home Land Property Interest	1111 = Exempt
28.	92. Multifamily Affordable Units	Exempt
29.	93. Submission of Application	1111 = Exempt

	LAR Field Number and Description	Exempt value
30.	94. Initially Payable to Your Institution	1111 = Exempt
31.	95. Mortgage Loan Originator NMLSR Identifier	Exempt
32.	96. Automated Underwriting System: 1	1111 = Exempt
33.	102. Automated Underwriting System Result: 1	1111 = Exempt
34.	108. Reverse Mortgage	1111 = Exempt
35.	109. Open-End Line of Credit	1111 = Exempt
36.	110. Business or Commercial Purpose	1111 = Exempt

HMDA/Print HMDA Wiz Data

The Print HMDA Wiz Data feature has been updated for 2019 reporting changes that include description changes to existing options and the inclusion of new options to existing fields.

Agency Code value of "9" now equates to BCPF (Bureau of Consumer Financial Protection)

Applicant Credit Model and Co-Applicant Credit Model fields will now contain the following updated descriptions for values 2, 3 and 4.

2 = Experian Fair Isaac Risk Model v2

3 = TransUnion FICO Risk Score Classic 04

4 = TransUnion FICO Risk Score Classic 98

Automated Underwriting Results fields 1 - 5 will now have new options 18 - 24.

18 = Accept/Eligible

19 = Accept/Ineligible

20 = Accept/Unable to Determine

21 = Refer with Caution/Eligible

22 = Refer with Caution/Ineligible

23 = Refer/Unable to Determine

24 = Refer with Caution/Unable to Determine

Homeownership Counseling Service Document

The program has been updated so the message that appears when users don't enter a valid zip code in the Primary Applicant Zip Code field on the SDC screen for the VMP996C (Notice Housing Counseling Agencies form) is clear and concise.

System message now reads, "You are required to enter a valid zip code in order to gather data for the Homeownership Counseling Service document.".

NDAS Loans — Variable Rate

The program has been updated so that an index is only required for closed end, variable rate, and consumer loans that use the NDAS documents. Previously, an index was required for all Variable Rate loans.

Transfer from ARTA Lending to ComplianceOne mortgage

Enhancements have been made to the program to allow more information to be transferred from ARTA Lending to ComplianceOne mortgage. Previously, if a credit report was pulled in ARTA Lending, and the loan was transferred to ComplianceOne mortgage, credit bureau address, phone number, internet address, and (where applicable) credit score range numbers were not populating to the Risk Based Pricing Notice, Risk Based Pricing Notice - Credit Score, and Notice of Action Taken documents. The system has been updated to transfer this information and users will no longer need to do a re-issue of the credit report or a credit bureau refresh in Financial Analysis in order for the information to appear on the forms.

VMP81 (Government Monitoring Data Collection Form)

The system has been updated to properly autoselect the VMP81 form and retain information entered into the SDC fields. Previously, when the VMP81 was autoselected for an application and the user saved and then exited the transaction, when recalling the transaction the document did not appear in the document list until the user clicked on Application Documents on the left-hand side of the screen. The VMP81 would then appear in the document list but the SDC fields were blank. This issue has now been resolved.

Other Program Changes

OneSumX Certification of Beneficial Owner(s)

The ARTA interface to OneSumX FCC has been updated to pass the entity type when the customer is an entity. This information is used in the Beneficial Ownership service when generating the Certification of Beneficial Owner(s) document within OneSumX.

Multi-State Form Changes

COMM-NOTE

COMM-NOTE (IL, MD, MO, OH, PA, SC, VA, VT, WI)

U.K. regulators are likely eliminating or deregulating the use of the London Inter-Bank Offered Rate (LIBOR) index rate at the end of the year 2021. As a result, the existing index rate replacement language in various commercial notes has been updated to enable the user to select:

- another base
- reference
- other rate as a replacement rate
- an alternative interest rate margin

NDAS-SI-XX (Simple Interest Note, Disclosure and Security Agreement for DC, DE, FL, GA, HI, ID, IL, KS, KY, LA, MA, MD, ME, MI)

These forms have been revised to meet market needs. Revisions have been made to the application of the cross-collateral (dragnet) clause in two ways:

1. A new paragraph has been added to the General Provisions section of the Promissory Note. The new paragraph provides that any cross-collateral clause included in the loan documents for

another transaction that the borrower has or will have with the same lender will become ineffective, if the application of the clause would result in the current loan transaction becoming subject to the requirements of Regulations Z and X for transactions secured by real property or a dwelling, or to the consumer protection provisions of 10 U.S.C. 987 (the "Military Lending Act").

2. The second paragraph of the Generally section of the Security Agreement has been revised to prevent the Security Agreement's cross-collateral clause from reaching another debt, if such other debt would become subject to 10 U.S.C. 987 (the "Military Lending Act").

In addition, because this document does not include Regulation Z Section 1026.18(s) disclosures required for transactions secured by real property or a dwelling and, therefore, cannot be used for such transactions:

- The Assumption policy statement has been deleted from the Fed Box.
- Both the Real Estate or Residence Security and the Assumptions sections have been deleted.

The following revisions have also been made (as applicable):

1. In the Definition section, a minor change has been made to the definition of Secured Debts: "to you" has been changed to read "by you," so that the first phrase reads "Secured Debts refers to all sums advanced by you under the terms of the Loan Agreement"
2. "I die or am declared legally incompetent." has been added to the Default section (does not apply to IA, ID, KS, ME, MO, NE, SC and WI)
3. "I agree to pay all actual costs of terminating your security interest." has been added to the Perfection of Security Interest section
4. In order to make completion of the document easier, the checkboxes preceding the Assumptions, Single Interest Insurance, and Property Insurance disclosures have been deleted.

Based on customer feedback, the document has been redesigned and is now in an 11-inch single column format.

Additional Changes for Maine

The Notice of Demand Loan has been removed.

Request for Transcript of Tax Return (4506-T) (VMP9045T)

The Request for Transcript of Tax Return (4506-T) (VMP9045T) has been revised based on the IRS posted updates to Form 4506-T. The taxpayer's SSN can no longer be used as a tracking number for third-party requesters, so the IRS has created an optional Customer File Number that third parties may use as an identifying number. Revisions have been made to add a new Line 5b for a 10-digit Customer File Number. Also, the Instructions page has been updated to reflect this new Customer File Number.

State-Specific Form Changes

California

COMM-AGREE (Loan Agreement Commercial) (CA)

The program has been updated so the information entered in the fields are formatted correctly, will be evenly spaced, and will not run off the page.

Colorado

NDAS-SI-CO (Simple Interest Note, Disclosure, and Security Agreement) (CO)

We have repaired an issue on the NDAS-SI-CO where the Additional Finance Charge checkbox was not checked, and the amount was not completed when there was an Additional finance charge entered in the Fees screen.

Georgia

Recording Cover Sheet (VMP368CGA) (GA)

Georgia House Bill 1036 allows Fulton County to require that the tax parcel identification number be placed at the top of the first page for any recordable (real estate) document. To allow for this the Recording Cover Sheet for Georgia has been created.

Indiana

NDAS-SI-IN (Simple Interest Note, Disclosure and Security Agreement) (IN)

The program has been updated so the checkboxes in the prepayment section work correctly on the NDAS-SI-IN. Previously, the "may" checkbox for minimum finance charge could not be selected.

North Dakota

AGCO-RESI-ND (Agricultural/Commercial Real Estate Security Instrument) (ND)

The program has been updated so the Filing As Financing Statement checkbox is unchecked on the AGCO-RESI-ND. Previously, the checkbox was automatically showing as checked on the document.

AGCO-RESI-ND (Real Estate Security Instrument Agricultural Commercial) (ND)

MMOD-ND (Modification Of Real Estate Security Instrument) (ND)

OCP-REMTG-ND (Open End Credit Plan Real Estate Security Instrument) (ND)

RE-MTG-ND (Real Estate Security Instrument) (ND)

SUB-LLSB-ND (Subordination Agreement Landlord Lien) (ND)

VMPC665ND (Open End Credit Plan Real Estate Security Instrument With MERS) (ND)

VMP995WND (Assignment of Mortgage) (ND)

The program has been updated so the information entered in the fields is formatted correctly, evenly spaced, and will not run off the page.

Oregon

EFS-3-ADD-OR (Effective Financing Statement Addendum) (OR)

The form EFS-3-ADD-OR has been created to match Oregon's EFS-3 form 421-a with a revision date of 2/13. This form is required if a user needs to add additional information to an EFS-3. The form is embedded in the EFS-3-LAZ-OR.

Texas

UN-TX (Universal Note) (TX)

UNS-LAZ-TX (Universal Note and Security Agreement) (TX)

A change has been made to the SDC for these forms. 'Other' has been added to the dropdown choices for "A change in the interest rate will take effect". When 'Other' is selected, a text field will appear which will allow the user to enter desired text.

Wisconsin

ASMT-RENT-WI (Assignment of Leases and Rents) (WI)

SUB-RESB-WI (Real Estate Lien Subordination Agreement) (WI)

These forms have been updated due to WI SB 131 which amends Wis. Stat. § 706.05 (2m)(a) to now require "...any document submitted for recording or filing that is to be indexed in the real estate records, any document submitted for recording or filing that modifies an original mortgage or land contract and any subordination agreement submitted for recording or filing shall contain the full legal description of the property to which it relates if the document or subordination agreement is intended to relate to a particular parcel of land. The legal description may be included on the document or may be attached to the document. Any such document shall also contain the document number of any original mortgage or land contract that the document affects and, if given on the original mortgage or land contract, the volume and page numbers of the original mortgage or land contract."

A Background section has been added to both forms that includes:

- the prior Security Instrument agreement date
- date and county where the prior Security Instrument was recorded
- document, volume, and page numbers where the prior Security Instrument was recorded
- county, street address and city where the property is located

In addition, the acknowledgment sections on the forms have been slightly modified.

Wyoming

EFS-1-LAZ-WY (Effective Financing Statement) (WY)

The EFS-1-LAZ-WY has been revised to match the model form with a revision date of May 2018. Changes include:

- The name Ed Murray and the Fax number were removed from the Wyoming Secretary of State areas.
- The form now requires the last 4-digits of the SSN or EIN instead of the entire number.

- Signatures for authorization, or authentication, for the Debtor and the Secured party in Sections 2 through 4 and Sections 7 through 9, were removed.
- An additional line was added to the Additional Farm Products section, Section 10.
- The Instructions were completely rewritten and reformatted.

EFS-3-LAZ-WY (Effective Financing Statement Amendment) (WY)

The EFS-3-LAZ-WY has been revised to match the model form with a revision date of May 2018. Changes include:

- The name Ed Murray and the Fax number were removed from the Wyoming Secretary of State areas.
- Signature instructions were removed from fields in Section 3.
- The form now requires the last 4-digits of the SSN or EIN instead of the entire number.
- Signatures for authorization, or authentication, for the Debtor and the Secured party in Sections 4 through 6 and Sections 9 through 12, were removed.
- Additional lines were added to the Updated Farm Product Information and Additional Farm Products sections, Sections 7 and 13.
- Checkboxes for Proceeds Covered and Products Covered were removed.
- The 'Pay Proceeds to Debtor and Secured Party unless otherwise checked' section was removed.
- The Instructions were completely rewritten and reformatted.

Additional Resources

ARTA Lending Application Training

Online Training

Visit <http://www.WoltersKluwerFS.com/Support/> to access a description of free online training sessions on ARTA Lending topics. After logging in, select ARTA Lending from the Products list, then Training. Current topics include:

- Introduction to ARTA Lending
- ARTA Lending - Flood Interface
- ARTA Lending - Application and Credit Bureau Modules
- ARTA Lending - Credit Bureau Module
- ARTA Lending - HMDA
- ARTA Lending - ATR and QM
- ARTA Lending and the Military Lending Act (MLA)

To access the Training site directly, click <http://Training.WoltersKluwerFS.com/>.

Handouts and Guides

Visit <http://www.WoltersKluwerFS.com/Support/> to access ARTA Lending supporting documentation. After logging in, select the Documentation tab and ARTA Lending. You will find the latest release notes, guides, and handouts for ARTA Lending.

Compliance Resources

Visit Compliance Headquarters™ at <http://www.WoltersKluwerFS.com/Insights/home.aspx> for the latest news, podcasts, articles, and video on compliance issues and regulations.

Upgrade Information

For information on upgrading your system, contact your hardware vendor or log on to <http://www.microsoft.com/en-us/>. For other questions, call SupportLine at 1.800.274.2711, Ext. 1124021 or visit our web site at <http://www.WoltersKluwerFS.com/Support/>.

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To ensure you receive this e-mail as well as future communications, make sure to add @wolterskluwer.com and @wolterskluwerfs.com to your safe senders list.

How to Contact Wolters Kluwer Support

Note: There may be situations where you provide or are asked to provide data to Wolters Kluwer for assistance in troubleshooting, implementation, or the delivery of professional services. When doing so, do not provide actual live data of your customers. Provide sample, fake data that is representative of the issue you are experiencing.

Web Site or E-Mail

Visit our Solutions Support web site at <http://www.WoltersKluwerFS.com/Support/> for documentation, downloads, frequently asked questions, training, support information, and submitting issues by e-mail.

You can also send an email to artalendingsup@wolterskluwer.com.

Phone: 1.800.274.2711

Our SupportLine technicians are available to take your calls Monday through Friday, 7 A.M. to 7 P.M. Central Time. Voice mail operates continually, allowing you to leave a message after business hours and on weekends. Technical calls will be returned Monday through Friday between 8 A.M. and 5 P.M. Central Time.

For all your ARTA Lending questions, use the following extension:

- ARTA Lending Ext. 1124021

To help us handle your questions as quickly as possible, have the following items available when you call:

- Product name and version number
- Customer number
- Operating system and version number

Fax 1.800.860.3595

Our fax number is listed above. Include Attention: SupportLine in the fax.

Write

If you prefer, write a letter detailing your question and send it to:

SupportLine
Wolters Kluwer
P.O. Box 1457
St. Cloud, MN 56302

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