

Follow these steps when using the CSC service to submit documents for eRecording.

Selecting a Document

1. From the **360** ribbon, click the **Services** button

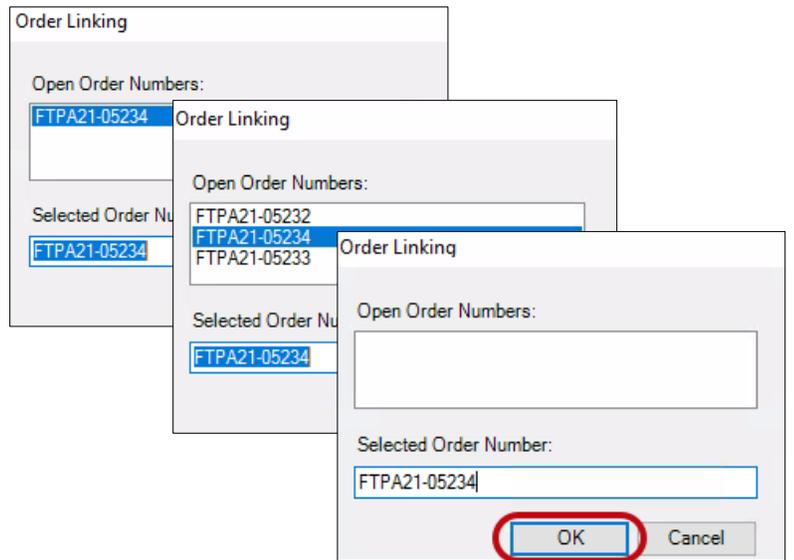


2. Expand the **Settlement Services** folder
3. Double-click the **CSC – eRecording** menu option



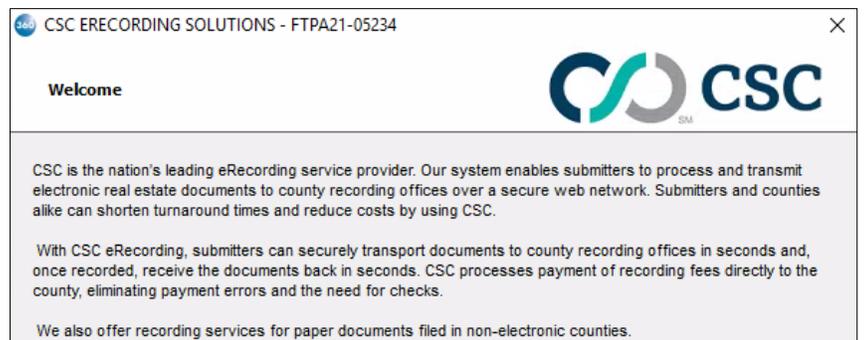
From the **Order Linking** window,

- a) If a single order is opened, only that order number is displayed
 - b) If multiple orders are opened, select the corresponding order number from the list
 - c) If no orders are opened, in the **Selected Order Number** field, enter the order number
4. Click the **OK** button



The **Welcome** window displays.

5. Click the **Next** button



- From the **CSC Login** window, enter your login credentials; click **Next**

HINT: Check the **Remember me** check box to skip the **Login** screen the next time you eRecord.

CSC populates information from your order. As you proceed through the next screens, information should be displayed but may be changed if necessary.

From the **Creating a Recording Package** window,

- Verify the proper,
 - County is displayed in the **Verify the recording location**, select if not
 - Cost Center** is displayed, select if not

- Click the **Attachment** button to select all recordable document(s) from smartView

From the **smartVIEW Documents** window,

- Click the folder (on the left) containing the document(s) you wish to record
- Check the corresponding check box for each document to be submitted; click the **OK** button

| Name | Descrip | Type | Size |
|--|---------|--------------|--------|
| <input type="checkbox"/> My Power of Attorney.pdf | | UNIDENTIFIED | 70144 |
| <input checked="" type="checkbox"/> My Deed.pdf | | UNIDENTIFIED | 123153 |
| <input checked="" type="checkbox"/> My Deed of Trust.pdf | | UNIDENTIFIED | 123153 |
| <input type="checkbox"/> My Affidavit.pdf | | UNIDENTIFIED | 182751 |
| <input type="checkbox"/> PTAX203NR.pdf | | UNIDENTIFIED | 164717 |

Do **not** include supplemental documents at this time; they are added in a later step.

The **Select the Document Type** window displays for each document selected. The document name is shown below the caption.

11. Identify the type of document
 - a) Select the corresponding County document type
 - b) Select the corresponding SoftPro Select document type; select **Other** if the appropriate option is not available

Once the document is recorded the data is then written to the applicable screen in SoftPro Select for the current document.

- c) Click the **Next** button

If the County requires indexing, the **Indexing Information** window displays with the **Grantor** and **Grantee** information populated from your SoftPro order (if available) for that document.

NOTE: **Grantor** and **Grantee** information can be,

- > manually entered in the corresponding fields

-Or-

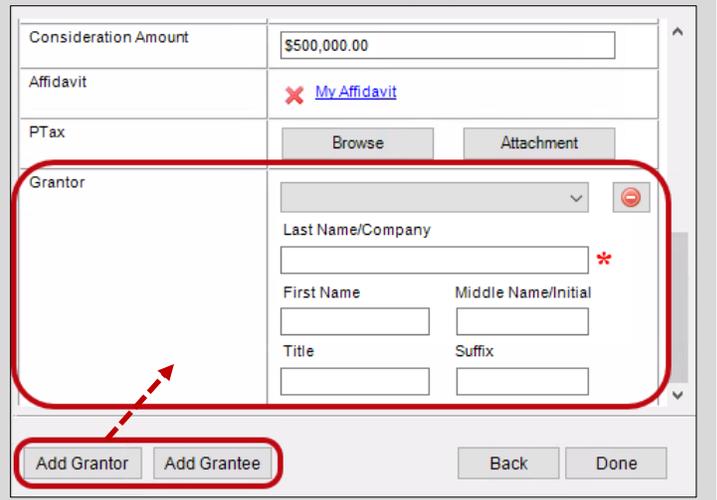
- > selected from the **Grantor / Grantee** drop-downs; this information pulls form your SoftPro order

A field with a **red** asterisk * indicates it is a required field. You cannot proceed until an entry is selected or information is entered.

NOTE: If you wish to enter additional Grantors and/or Grantees, click the **Add Grantor** (or **Add Grantee**) button; the additional fields appear below the consideration field.

These fields require a name be entered as denoted by a red asterisk .

You may delete the additional Grantor/Grantee by clicking the Cancel  icon.

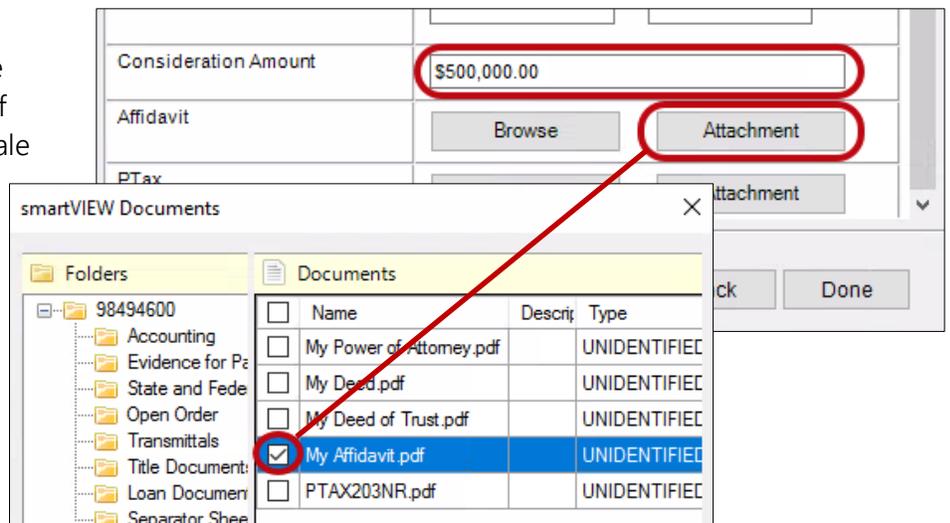


The screenshot shows a form with the following fields: Consideration Amount (\$500,000.00), Affidavit (My Affidavit with a red X), and PTax (Browse, Attachment). Below these is a Grantor section with a dropdown menu, a red minus icon, and input fields for Last Name/Company (with a red asterisk), First Name, Middle Name/Initial, Title, and Suffix. At the bottom are buttons for Add Grantor, Add Grantee, Back, and Done.

- Use the scroll bar to view the **Consideration Amount**, field name varies depending upon the type of document (i.e., Loan Amount or Sale Price)

If supplemental documents are required,

- Click the **Attachment** button to select from smartVIEW



The screenshot shows a 'smartVIEW Documents' dialog box with a tree view on the left and a table on the right. The table has columns for Name, Description, and Type. 'My Affidavit.pdf' is selected in the table. In the background, the 'Attachment' button from the previous screenshot is circled in red.

| Name | Descrip | Type |
|--|---------|--------------|
| <input type="checkbox"/> My Power of Attorney.pdf | | UNIDENTIFIED |
| <input type="checkbox"/> My Deed.pdf | | UNIDENTIFIED |
| <input type="checkbox"/> My Deed of Trust.pdf | | UNIDENTIFIED |
| <input checked="" type="checkbox"/> My Affidavit.pdf | | UNIDENTIFIED |
| <input type="checkbox"/> PTAX203NR.pdf | | UNIDENTIFIED |

Click the **Remove**  icon to remove the attachment, if needed.

- Click **Done** when all required information has been entered/verified



The screenshot shows the recording form with the Affidavit field containing 'My Affidavit' and a red X icon. The Done button at the bottom right is circled in red.

Changing/Adding/Removing Documents

You are returned to the **Creating a Recording Package** window. From this screen, you may use the,

- > **Attachment** button to continue adding documents
- > **Modify** button to change the type of document (refer to Step 12 above)
- > **Rename** button to change the name of the document highlighted
- > **Delete** button to remove the selected document completely
- > **Email Notifications** link to send an email when a package is in **Ready** status in the **360 Queue**

If you wish to send email notifications,

- a. Click the **Email Notifications** link

The **Email Notifications** window shows the,

- > Escrow Officer, Escrow Assistant and Title Officer if they have been selected in the SoftPro order
 - > Person submitting the order
 - > A freeform text box to enter an additional email address, if needed
- b. Check the corresponding check box for each recipient to receive the notification
 - c. Click the **OK** button to close

15. Click the **Submit** button once all changes have been made. The document(s) is/are submitted to CSC.

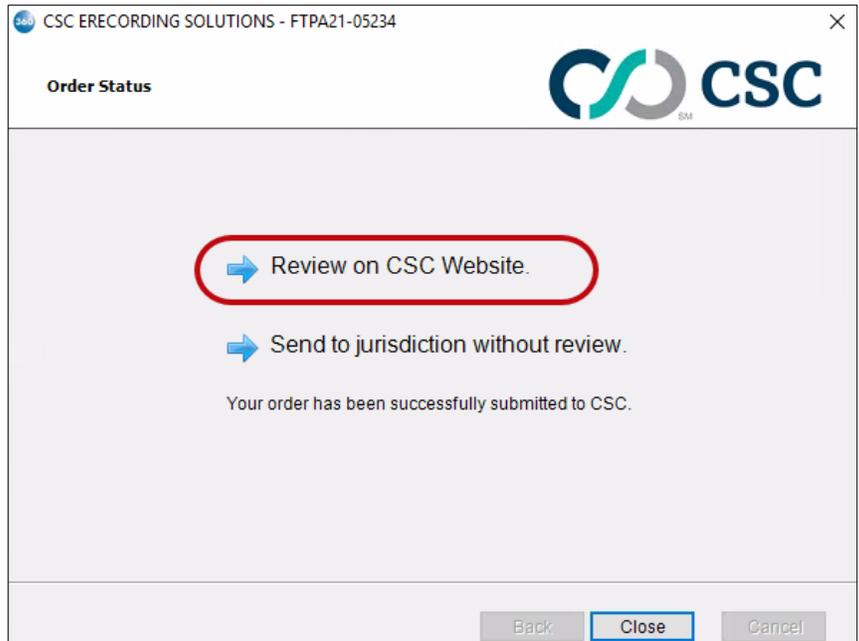
Once the package has been submitted to CSC, the **Order Status** window displays allowing you to review the package.

16. Click the **Review on CSC website**; this opens the CSC website in your default browser (Internet Explorer)

NOTE: You can also review the package directly on the CSC website using Chrome.

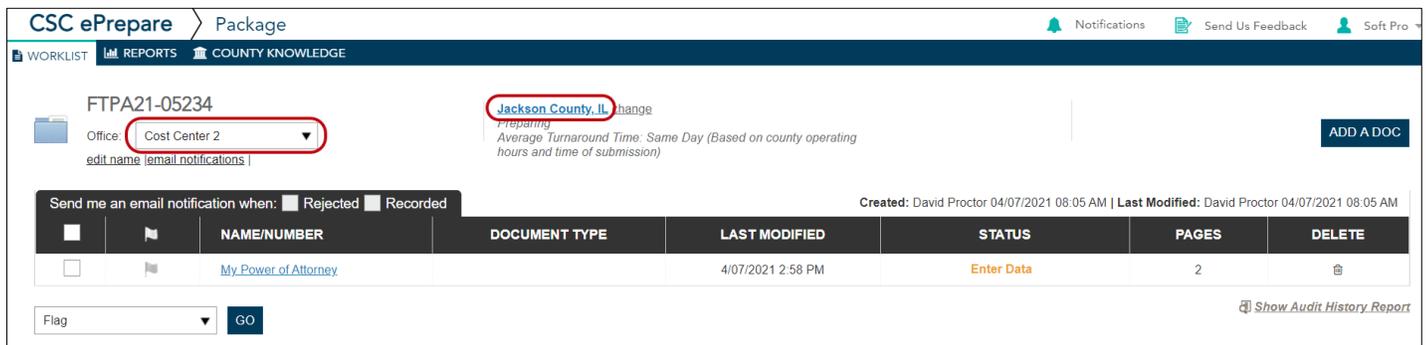
1. Click the **Close** button
2. Open Chrome and navigate to the CSC website

Using Chrome allows for a more seamless interface.



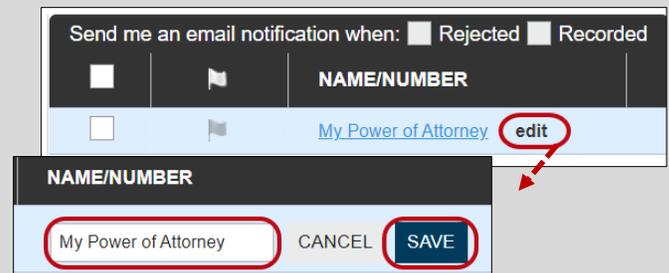
Reviewing the Document

1. Verify the,
 - a) Office
 - b) County



To edit the document name,

1. In the **Name/Number** field, hover over the document name
2. Click the **edit** link
3. Make the necessary changes, click **Save** button

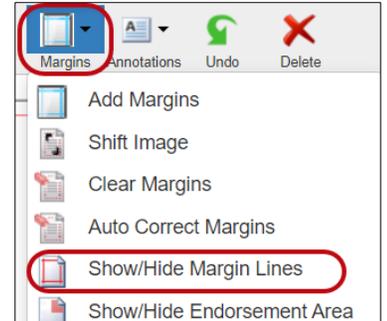


2. In the **Name/Number** field, click the document name link



3. Verify the document meets the County recording standards

a) Document fits within the red lines on all sides shown in the review window; click the **Margins>Show/Hide Margins** option to display the margins



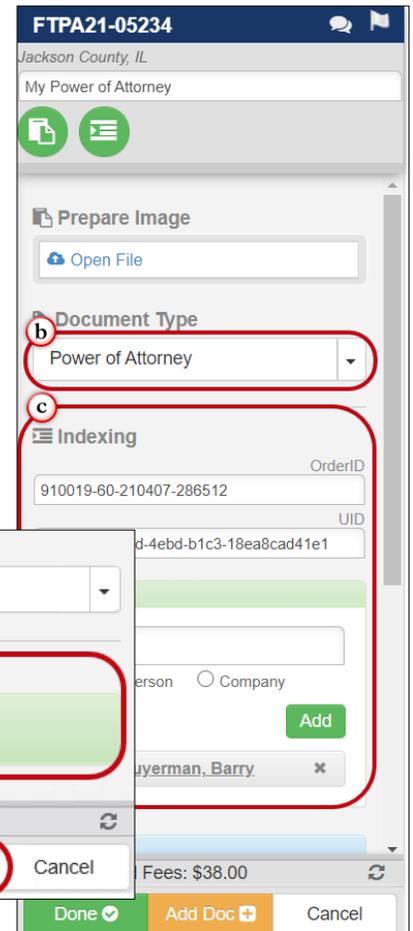
b) **Document Type** is correct

c) **Indexing**, if required; a message is displayed if no indexing is required

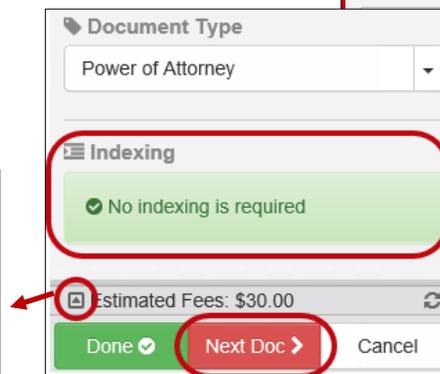
- i. **Grantors** names are correct
- ii. **Grantees** names are correct
- iii. **Consideration** (if applicable) is correct

d) Click the **Next Doc** button to review the next document

4. Verify **Estimated Fees** are correct; click the **Estimated Fees** icon to review the breakdown

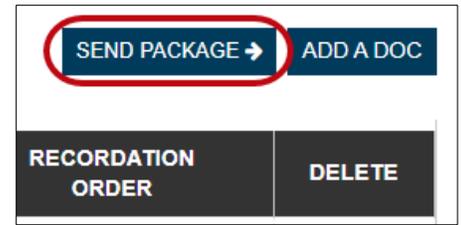


| Estimated Fees | |
|-------------------------------|---------|
| Jurisdiction Fees: | |
| Recording Fee ⓘ | \$38.00 |
| Additional Pages Fee ⓘ | \$0.00 |
| Estimated Total: \$38.00 | |
| Service Fees: | |
| CSC Service Fee ⓘ | \$1.00 |
| Total: \$1.00 | |
| Estimated Fees Total: \$39.00 | |



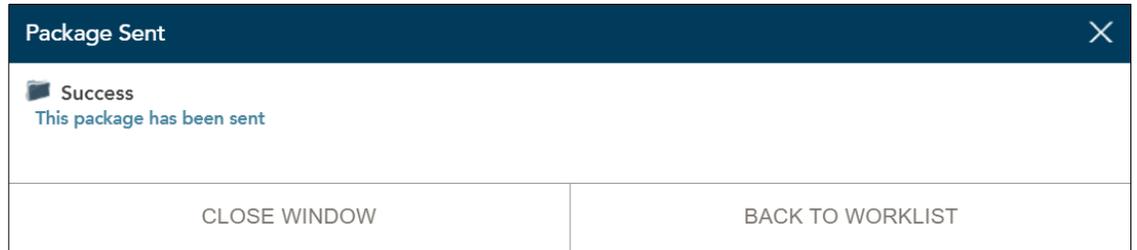
5. Click the **Done** button when you are ready to submit

6. Click **Send Package** button to submit the document for recording



The **Package Sent** window displays that the package has been sent.

7. Click the **Close Window** button



IMPORTANT: If using the **Review on CSC Website** button to view in Internet Explorer, be sure to click the **Close** icon (upper right hand corner) to close the Internet Explorer window. If the window is not closed, subsequent recordings open new tabs and can cause memory issues if too many tabs are open at one time.

In SoftPro Select, the recording is displayed in the **360 Queue** with a **Status** of **In Progress**.

| Provider | Service | Status | Linked Order | Linked Profile | Created By | Created On | Completed On | Description |
|----------|------------|-------------|--------------|-------------------|------------|-------------------|--------------|--------------------------------|
| CSC | eRecording | In Progress | FTPA21-05234 | Default\P\FL\O... | Melody | 3/31/2021 2:49 PM | | Abandonment, Deed, DeedofTrust |

Utilizing Automation to Accept the Recorded Transaction

Once the documents are recorded, the **360 Queue** displays the **Status** as **Ready**. Operations utilizing the automation process to accept **Ready** transactions do not need to do anything further.

| Provider | Service | Status | Linked Order | Linked Profile | Created By | Created On | Transaction Number |
|----------|------------|--------|--------------|-------------------|------------|-------------------|-------------------------|
| CSC | eRecording | Ready | FTPA21-05234 | Default\P\FL\O... | Melody | 3/31/2021 2:49 PM | 910019-60-210331-286068 |

The automation process,

- > accepts the recording data into the order
- > uploads the recorded documents to smartView
- > updates the **Status** to **Completed** in **SoftPro**

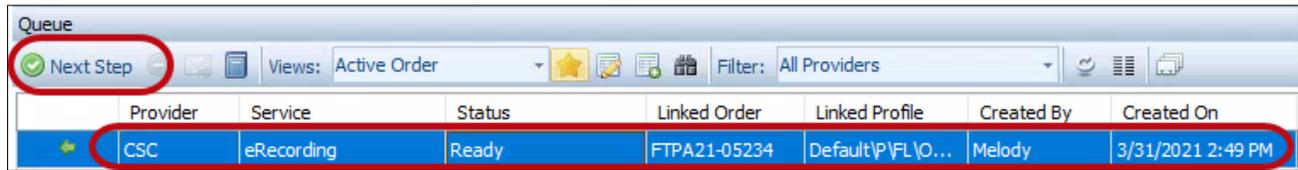
Reviewing and Accepting the Recorded Transaction when Automation NOT Utilized

Once the documents have been recorded, the **Status** is displayed as **Ready** in the **360 Queue**.

| Queue | Provider | Service | Status | Linked Order | Linked Profile | Created By | Created On | Transaction Number |
|-------|----------|------------|--------|--------------|------------------|------------|-------------------|-------------------------|
| | CSC | eRecording | Ready | FTPA21-05234 | Default\P\F\O... | Melody | 3/31/2021 2:49 PM | 910019-60-210331-286068 |

To review and accept the recording data in to SoftPro Select,

1. Highlight the entry and click the **Next Step** button (or double-click the entry)



The **Review** window shows the recorded documents and the corresponding information for each.

Groups shows recording data and charges

Notes shows notes corresponding to each document

Documents shows recorded documents

Review - FTPA21-05234

Select All | Select None | Field Codes

| Groups | Name | Current Value | New Value |
|----------------------|---|-----------------------|---------------------|
| All | <input checked="" type="checkbox"/> Recorded Date | 3/31/2021 3:17:42 ... | 2021-03-31 15:17:42 |
| My Power of Attorney | <input checked="" type="checkbox"/> Book Number | 123 | 123 |
| My Deed | <input checked="" type="checkbox"/> Book Number Label | Book Number | Book Number |
| My Deed of Trust | <input checked="" type="checkbox"/> Page Number | 456 | 456 |
| Recording Fee | <input checked="" type="checkbox"/> Page Number Label | Page Number | Page Number |

Notes

- Power of Attorney 1 Recording Fee : \$40.00, Power of Attorney 1 Submission Fee : \$1.00, Power of Attorney 1 Total : \$41.00
- Deed 1 Recording Fee : \$40.00, Deed 1 Submission Fee : \$1.00, Deed 1 Total : \$41.00
- Deed of Trust 1 Recording Fee : \$40.00, Deed of Trust 1 Submission Fee : \$1.00, Deed of Trust 1 Total :

Documents

| View | Copy | File Name | File Size | Transferred |
|-------------------------------------|------|-----------------------------------|-----------|-------------|
| <input checked="" type="checkbox"/> | | My Power of Attorney_Recorded.pdf | 4777 | 100% |
| <input checked="" type="checkbox"/> | | My Deed_Recorded.pdf | 41911 | 100% |
| <input checked="" type="checkbox"/> | | My Deed of Trust_Recorded.pdf | 41911 | 100% |

SmartView Folder: [98494600](#)

2. Click the **SmartView Folder** link to select and upload the recorded documents and invoice to a specific folder in smartView
3. Click the **OK** button to return to the **Review** window
4. Click the **Accept** button

Browse Folder

Please select the desired folder

- 98494600
 - Accounting
 - Evidence for Payments through Escrow
 - State and Federal Tax Documents
 - Open Order
 - Transmittals
 - Title Documents**
 - Loan Documents
 - Separator Sheets

SmartView Folder: [Title Documents](#)

Accept | Close

Accepted Data and Documents

Once the transaction is accepted utilizing automation or manually by the operation the,

- › **Status** is set to **Completed** in the **360 Queue**

| Provider | Service | Status | Linked Order | Linked Profile | Created By | Created On | Completed On |
|----------|------------|-----------|--------------|----------------|--------------------|-------------------|-------------------|
| CSC | eRecording | Completed | 2017070003 | Default | Susan Rivera-Stoll | 6/30/2017 2:57 PM | 6/30/2017 4:36 PM |

- › **Notes** screen updates with recording charges shown per document; **Last Modified** shows an individual's name if accepted manually and *Automation* if accepted via the automation process.

| Type | Linked From | Created | Last Modified | Note |
|------|-------------|-----------------|--------------------|---|
| | | 04/09/2021 0... | Susan Rivera-Stoll | Deed of Trust 1 Recording Fee : \$40.00 Deed of Trust 1 Submission Fee : \$1.00 Deed of Trust 1 Total : \$41.00 |
| | | 04/09/2021 0... | Susan Rivera-Stoll | Deed 1 Recording Fee : \$40.00 Deed 1 Submission Fee : \$1.00 Deed 1 Total : \$41.00 |

- › Recording data (from CSC) is written to the corresponding fields for the document on the applicable screen, (i.e., Deed, Security Instrument, etc.)

Loan: 1 Allstate Funding Corporation (\$475,000.00)

Recording Information

Dated: (None) Date/Time recorded: 03/31/2021 03:17 PM

Recorded at/in: Book Number 123 Page Number 456 Instrument Ni 171813

Place recorded: Book Number 123, Page Number 456, Instrument Number 171813

- › Actual recording fees are written to the **Collected vs. Actual** screen in SoftPro Select; recording reports can be run to determine overages or shortages.

| Category | Bill Codes | Actual Initial | Actual Initial Reimbursable | Actual Re-Recorded | Actual Re-Recorded Reimbursable | Total Actual | Reimbursable Actual | Total Collected | Amount to Refund | Amount of Loss |
|---------------------------|------------|-----------------|-------------------------------------|--------------------|-------------------------------------|-----------------|---------------------|-----------------|------------------|-----------------|
| Recording Fees | RCF | \$120.00 | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> | \$120.00 | \$120.00 | \$118.00 | \$0.00 | (\$2.00) |
| Transfer Taxes | None | | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Recording Service Charges | RES | \$3.00 | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> | \$3.00 | \$3.00 | \$3.00 | \$0.00 | \$0.00 |
| Other | None | | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Totals | | \$123.00 | | | \$0.00 | \$123.00 | \$123.00 | \$121.00 | \$0.00 | (\$2.00) |

Reconcile complete Close

> Recorded documents and CSC invoice are available in the smartView folder.



> If you selected an Email Notification during the submission process, the recipient selected receives an email with a breakdown of the charges.

