

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

### Selecting a Document

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

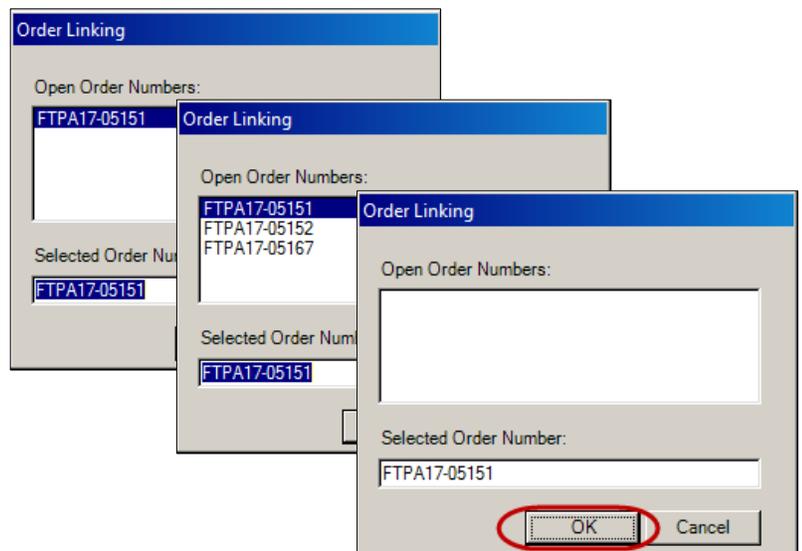


2. Expand the **Settlement Services** folder
3. Double-click the **ePN – eRecording** menu option



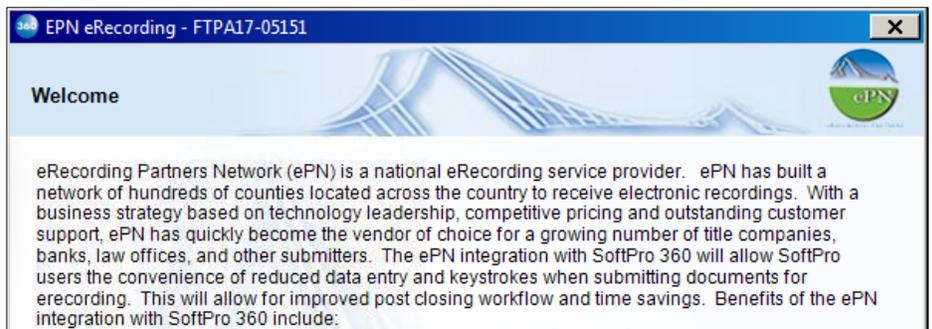
From the **Order Linking** window,

- 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

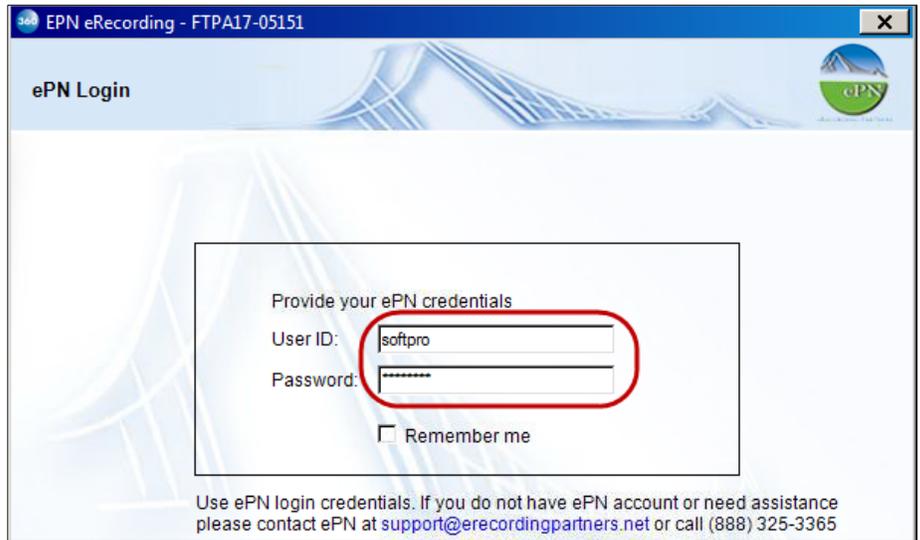


4. Click the **OK** button

5. The **Welcome** screen displays, click the **Next** button



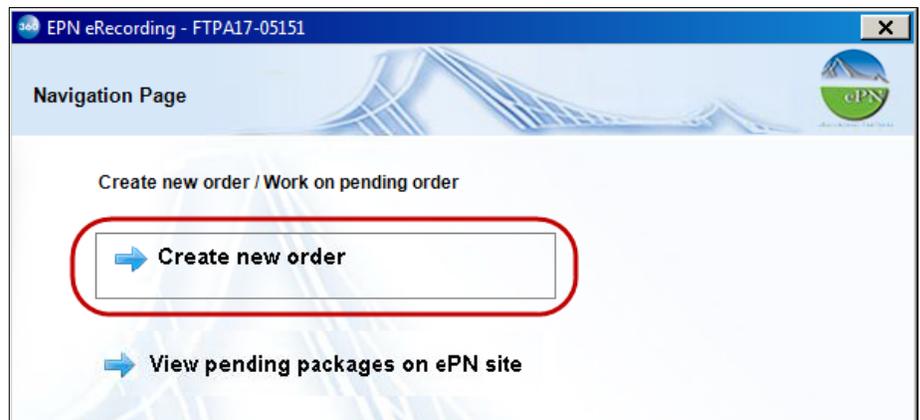
- From the **ePN Login** window, enter your login credentials; click **Next**



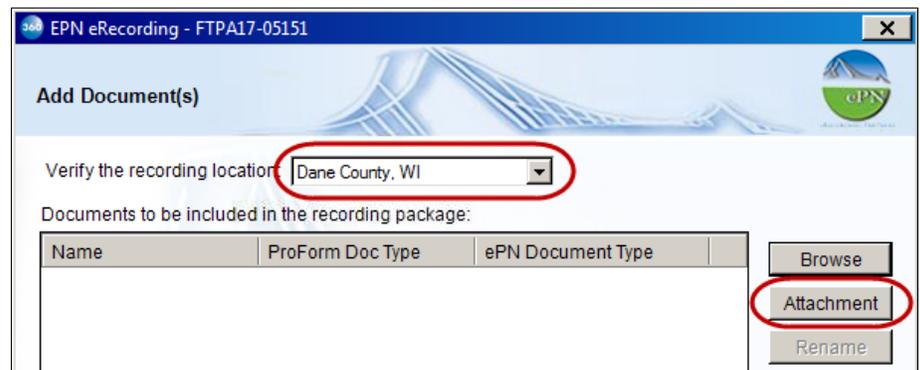
ePN populates information from your order. As you proceed through the next screens, information should be displayed but may be changed if necessary.

From the **Navigation Page** window,

- Click the **Create new order** option

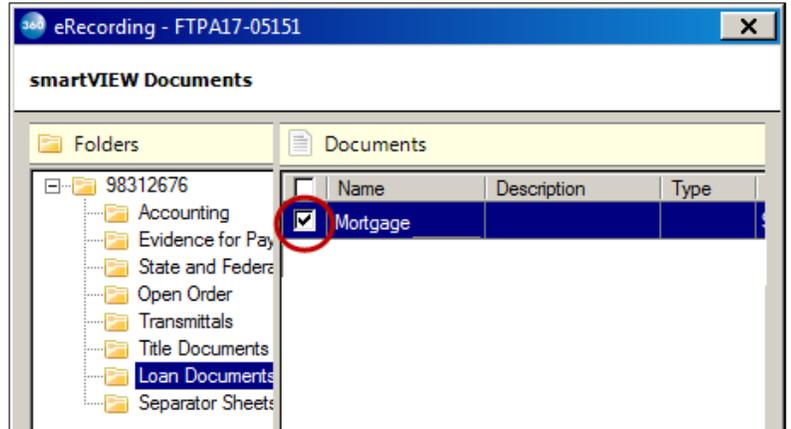


- Verify the proper County is displayed in the **Verify the recording location**; if not select
- Click the **Attachment** button to select the document(s) from smartVIEW

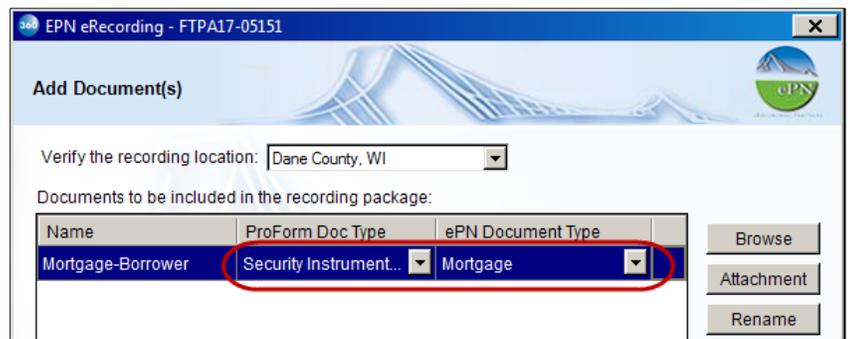


From the **smartVIEW Documents** window,

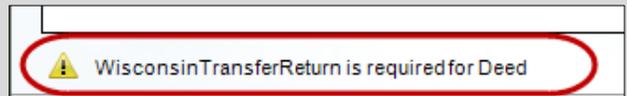
10. Click the folder (on the left) containing the document(s) you wish to record
11. Check the corresponding check box for the appropriate document; click the **OK** button



12. Identify the type of document
  - a) Select the corresponding **ProForm Doc Type**; once the document is recorded the data is then written to the applicable screen in SoftPro Select for the current document
  - b) Select the corresponding **ePN Document Type**

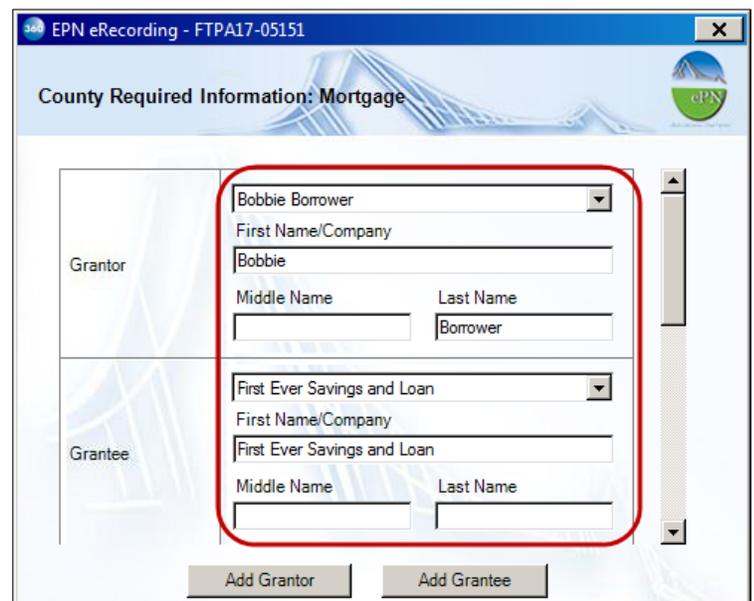


NOTE: If the document being submitted requires supporting documentation, a message is displayed at the bottom of the screen.



The **County Required Information** window is immediately displayed.

13. Select/enter the **Grantor**
  - a) Select from the drop-down menu; this information is pulled from SoftPro Select
  - OR-
  - b) Manually enter the information
14. Select/enter the **Grantee**
  - a) Select from the drop-down menu; this information is pulled from SoftPro Select
  - OR-
  - b) Manually enter the information



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

Enter the corresponding information for the additional **Grantor/Grantee**.

If nothing is entered, these fields disappear once the Package is Saved.

15. Scroll down to verify the,
  - a) **Execution Date**
  - b) **Property** information
  - c) **Recording Fees**
16. Click **Save** when all applicable information has been entered/verified

17. Click the **Submit to ePN** button
18. From the **Review Submission** window, select the **Review on ePN Website** option

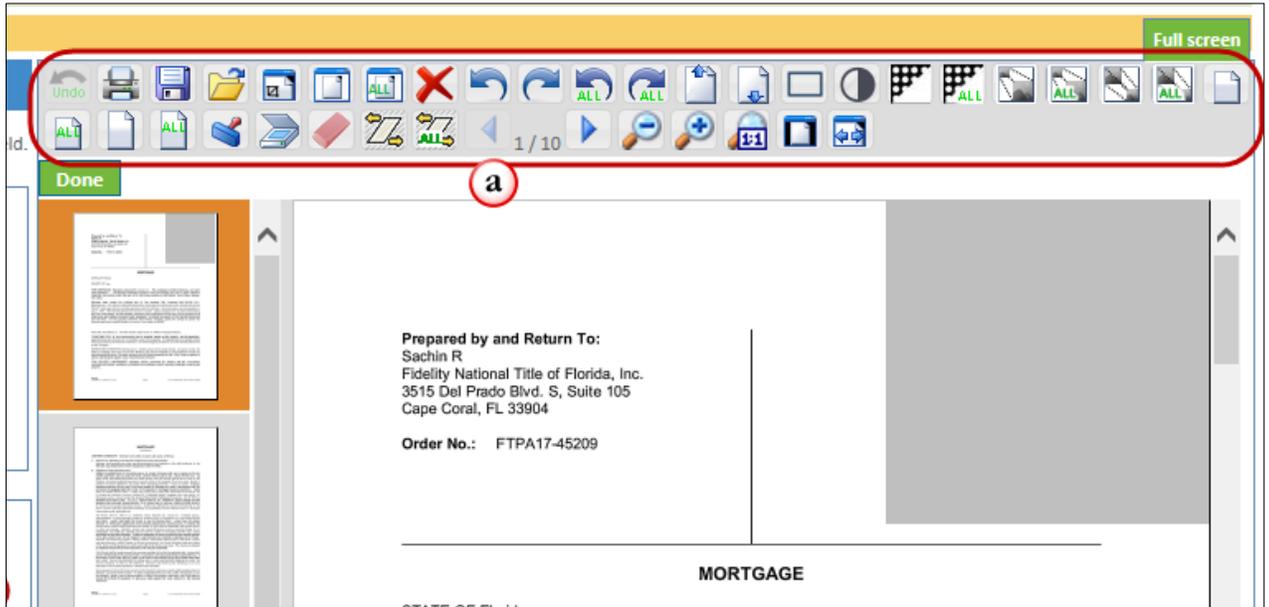
### Adding Additional Information (if required)

- › If additional information is required, it is displayed to the right of the document information.
  1. Click the link to enter the required information
  2. Click the **Save** button to proceed to the **Package** screen and review your document(s)

- › If no additional information is needed, the document list with the document details and edit sections are displayed

### Reviewing the Document

1. Verify the document information
  - a) Use the toolbar **Edit** icons to adjust the document as needed (i.e., rotating, erasing stray lines, moving the document to maintain the required margins, etc.)



- b) **Document Image** verify the **Document Type** and **No. of Pages Uploaded**
- c) **Organization Information** displays the recording fee allocation

If recording,

- i. one document, click the **Assign All Charges to this Document** button to assign the total recording fee to the current document
- ii. multiple documents, in the **Doc Amt** field, enter the applicable recording fee for the current document; the **Remaining Amt** decreases as you allocate fees to each document
- iii. Click the **Save** button to save the allocation; use the **Reset** button to re-enter all allocations

**WIP Document**

**DOCUMENT SUMMARY**

4 Save \* Indicates required field.

**Document Image** b

Document: 1 of 1

Document Type:\* Mortgage

Document Image: Mortgage

No. of Pages Uploaded 10

**Organization Information** c

Collected Fees List	CD Amt	Remaining Amt	Doc Amt
Recording Fees	150.00	150.00 >	150.00
Fee Total	150.00	150.00	0.00
Tax Total	0.00	0.00	0.00

**Assign All Charges to this Document**

Cancel Save Reset

- d) Parties – the Grantors/Grantees selected earlier (Steps 13-14) appear at the bottom
  - i. only enter information if you need to add new parties to the transaction
  - ii. if you need to change/correct an existing party, click the edit  icon to the right of their information

**ADDITIONAL INFORMATION**

**Parties** d

Please Note: If entering a business, put the company name in the First Name field and leave the Middle and Last Name fields blank.

Party Type: \*  
Please select..

First/Business Name: \*  
Middle Name: Last Name: Name Suffix:

Type	First Name	Middle Name	Last Name	Name Suffix	Action
Grantee	First Ever Sa				
Grantor	Bobbie		Borrower		

2. Click the **Submit this Package** button when you've completed your review

[<< Home](#)

**Edit WIP Package**

1. Choose Jurisdiction 2. Add Document 3. Review 4. Submit

Jurisdiction: Dane County, WI Reference Value: 2017060002 [Edit](#)

Status	Document Type	Pg. Count	Order	Action	Move	Has Image
	Mortgage	10	1			

3. At the confirmation message, click **OK** to complete the submission

**Confirmation Message** ✕

Once submitted, a package cannot be retracted. Are you sure you want to submit this Package?

**Dane County, WI - 2017060002**

Document Type	Page Count	Order
Mortgage	10	1

You are returned to the ePN Main page. The package submitted appears in the **Processing Status** tab with a **Status of Processing at County**.

Work in Progress (WIP) | Returned | **Processing Status**

**Search criteria**

Please choose the search criteria.

Submit Start Date:  Submit End Date:  State:  Jurisdiction:  User:  Reference Value:

Email a copy to me:

**Search** **Reset**

Id	Reference Value	State	Jurisdiction	Submitted Date	Docs	<b>Status</b>
757246	2017060002	WI	Dane	6/30/2017	1	Processing at County

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

Queue

Views: Active Order Filter: EPN

Provider	Service	<b>Status</b>	Linked Order	Linked Profile	Created By	Created On	Comple
EPN	eRecording	In Progress	FTPA17-05151	Default\P\FL\OAC\TPA\FT\17-FNT Cape Coral	Susan Rivera-Stoll	6/26/2017 10:47...	

### Reviewing and Accepting the Recorded Transaction

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

Queue

Views: Active Order Filter: EPN

Provider	Service	<b>Status</b>	Linked Order	Linked Profile	Created By	Created On	Completed On	Description	Transaction Number
EPN	eRecording	Ready	2017060002	Default	Susan Rivera-Stoll	6/30/2017 2:57 PM			410060-30-170630-033...

To review and accept the information in to SoftPro Select,

- › In the **360 Queue**, double-click the entry (or highlight and click the **Next Step** button)

Queue

**Next Step** Views: Active Order Filter: EPN

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On
EPN	eRecording	Ready	2017060002	Default	Susan Rivera-Stoll	6/30/2017 2:57 PM	

- › From the **Groups** section, click the document type (e.g., Deed, Mortgage, etc. – this varies depending upon the type of document(s) submitted)
- › The information for that document to be written to SoftPro Select is displayed to the right; this includes the,
  - › Recording Fees
  - › Recording Data

Review - 2017060002

Select All | Select None | Field Codes

Groups	Data	Current Value	New Value
All	<input checked="" type="checkbox"/> Name		
Mortgage-Wisconsin Recording Fee	<input checked="" type="checkbox"/> Recorded Date	6/30/2017 8:59:06 AM	06/30/2017 03:22:00 PM
	<input checked="" type="checkbox"/> Book Number	389	15837
	<input checked="" type="checkbox"/> Book Number Label	Book Number	Book Number
	<input checked="" type="checkbox"/> Page Number	46	1344
	<input checked="" type="checkbox"/> Page Number Label	Page Number	Page Number
	<input checked="" type="checkbox"/> Instrument Number	8827486497	33342494554046

Documents

If more than one document is recorded, click the **Recording Fee** option to see all fees.

Groups	Data	Name	Current Value	New Value
All	<input checked="" type="checkbox"/>	Recording Fee	0	86.50
Mortgage-Florida.pdf	<input checked="" type="checkbox"/>	Transfer Tax	0	1375.00
	<input checked="" type="checkbox"/>	Submission Fee	0	5.00

- › Uncheck any data you do not wish to be written to SoftPro

**NOTE:** **Current Value** is data that already exists in the corresponding fields in SoftPro Select. The **Replacement Value** is new data coming from ePN and overwrites the **Current Value** data.

If you wish to view the recorded documents, in the **Documents** section,

- › In the **View** column, double-click the pdf icon to open the document

View	Copy	File Name	File Size	Transferred
		Mortgage-Wisconsin_Recorded.pdf	723547	100%

To upload the information to SoftPro Select,

- › Click the **Accept** button
- › When prompted, click the **Yes** button to accept the data and recorded documents; **No** returns you to the Review screen
- › When the confirmation message is displayed, click **OK**

Once accepted, the

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

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On
EPN	eRecording	Completed	2017060002	Default	Susan Rivera-Stoll	6/30/2017 2:57 PM	6/30/2017 4:36 PM

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

**Security Instruments**

Borrower: [Dropdown] Borrower: [Dropdown]

**Recording Information**

Dated: (None) Date/Time recorded: 06/30/2017 03:22 PM

Recorded at/in: Book Number 15837 Page Number 1344 Instrument N# 33342494554

Place recorded: Book Number 15837, Page Number 1344, Instrument Number 33342494554046

- › Actual recording fees are written to the **Collected vs. Actual** screen in SoftPro Select; refer to your State's Recording Charges job aid if an overage/shortage exists

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	None	\$29.00	✓		✓	\$29.00	\$29.00	\$27.00	\$0.00	(\$2.00)
Transfer Taxes	RSE2	\$1,314.00	✓		✓	\$1,314.00	\$1,314.00	\$1,315.00	\$1.00	\$0.00
Recording Service ...	None	\$5.00	✓		✓	\$5.00	\$5.00	\$0.00	\$0.00	(\$5.00)
Other	None		✓		✓	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals</b>		<b>\$1,348.00</b>		<b>\$0.00</b>		<b>\$1,348.00</b>	<b>\$1,348.00</b>	<b>\$1,342.00</b>	<b>\$1.00</b>	<b>(\$7.00)</b>

Reconcile complete Close

- › Depending upon your operation's automation process, recorded documents are available via the **Attachments** screen or **smartVIEW**