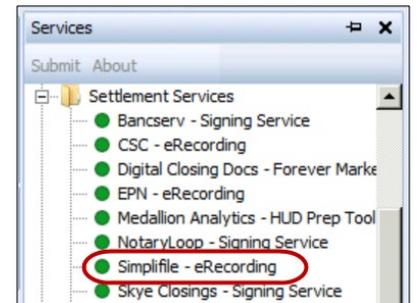Follow these steps when using the Simplifile service to submit documents for eRecording.

Selecting a Document

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

2. Expand the **Settlement Services** folder

3. Double-click the **Simplifile – 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
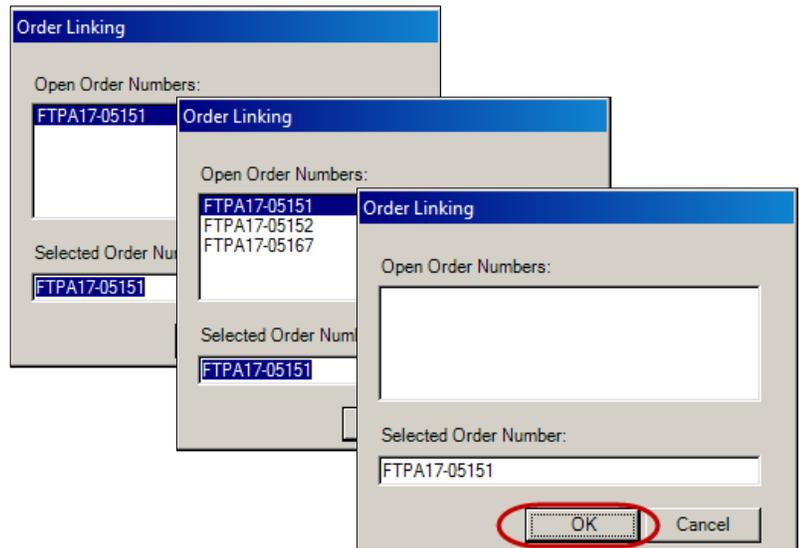
5. From the **Simplifile Login** window, enter your login credentials; click **Next**

Click the **Register New Account** link if you are not already setup.

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

6. From the **Select a County** window, verify,

    a) the County for your Property is displayed (this is the County where documents are to be recorded)

    b) your Cost Center is displayed
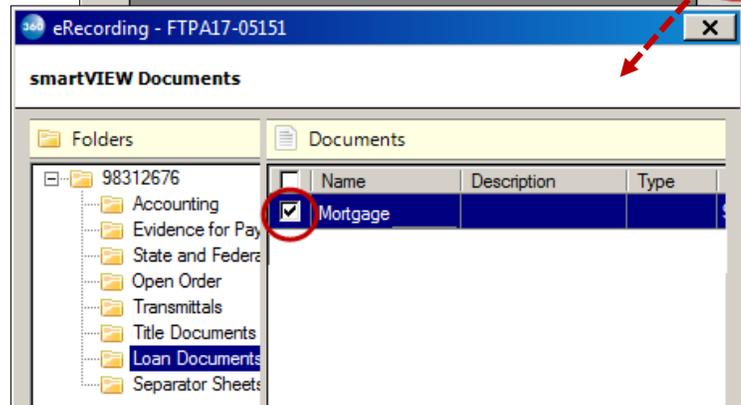
    c) Click the **Next** button

From the **Simplifile Document Delivery** window,

7. Click the **Attachment** button to select document(s) from smartVIEW
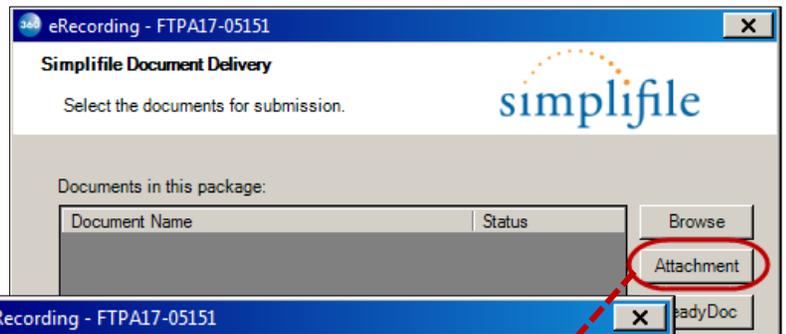
From the **smartVIEW Documents** window,

8. Click the folder (on the left) containing the document(s) you wish to record

9. Check the corresponding check box for each document to be submitted; click the **OK** button

10. Identify the type of document

    a) Select the corresponding County document type

    b) Select the corresponding SoftPro Select document type; 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
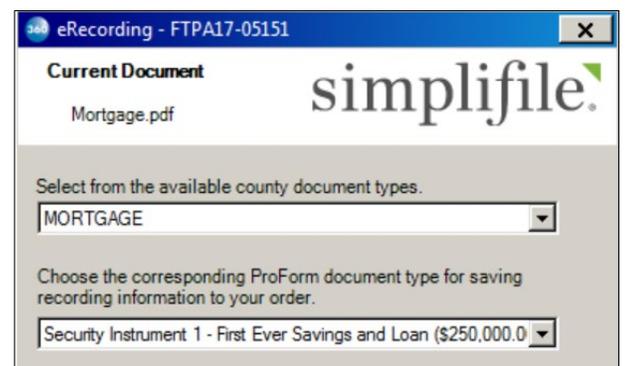
11. Verify the **Consideration**; click **Next**
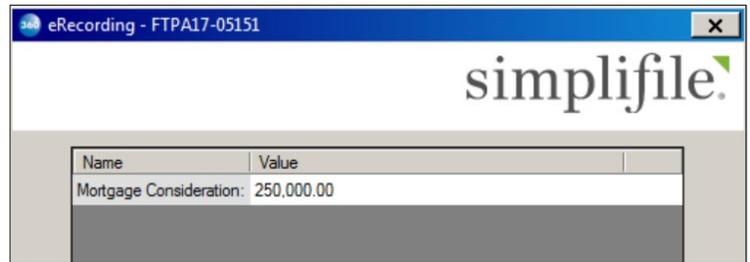
12. Check the check box for the applicable **Grantors / Grantees** for the corresponding document
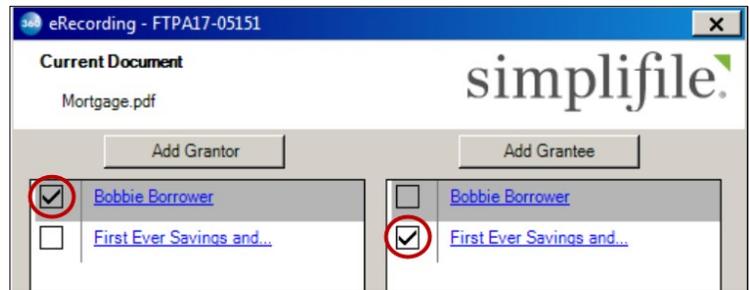
NOTE: Simplifile populates **all** Buyer, Seller and Lender names entered in the order. You may also add additional names for **Grantors** and/or **Grantees**.

1. Click the **Add Grantor** or **Add Grantee** button

2. Enter the applicable information; click the **Save** button

The check box for the additional **Grantors/Grantees** is checked by default. You may check other **Grantors/Grantees** if needed.
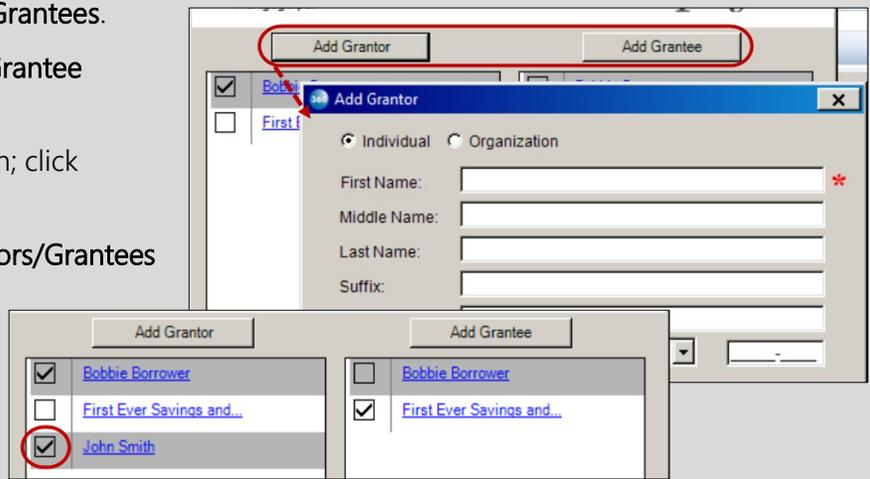

13. Click the **Next** button

Adding Helper Documents (if required)

The County may require additional document(s) (i.e., Transfer Declaration, etc.) to be submitted with your document. If so, the **Helper Documents** window is be displayed.

If this window is not displayed, skip to **Step 16**; otherwise continue on to **Step 14**.

14. Click the **Attachment** button to select the document(s) from smartVIEW

15. Click the **Next** button
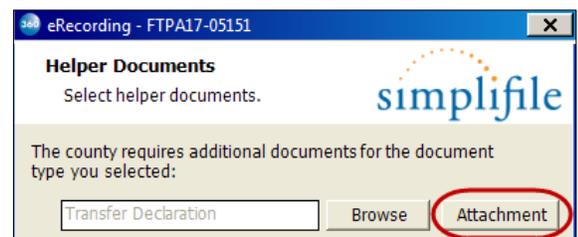
Changing/Adding/Removing Documents

The **Simplifile Document Delivery** window allows you to make changes, add or remove document(s), etc.

〉 Click the **Attachment** button to add additional documents; repeat **Steps 8-13** above

〉 Click the **Modify** or **Rename** button to change the existing document; repeat **Steps 10-13** above

16. Click the **Next** button if no changes, or you've completed the necessary changes
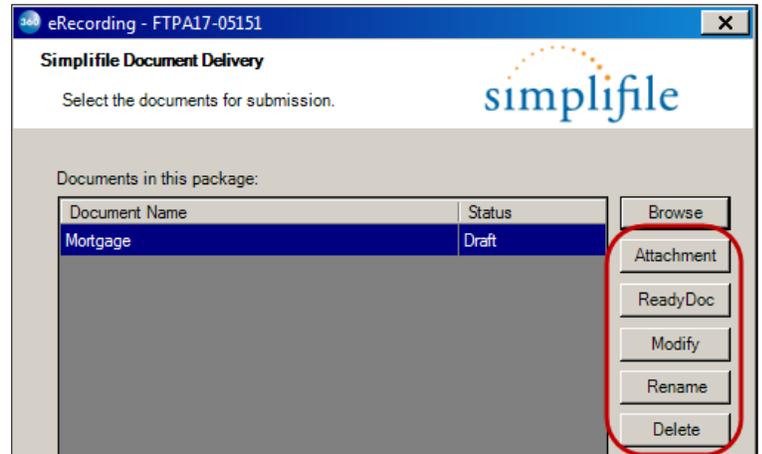
Submitting the Document(s)

From the **Ready to Submit** window,

17. Check the check box if you would like to receive an email notification when the recorded package is READY; verify the email address

18. Verify the radio button for **Review the document package on Simplifile's website** is selected; if not, select
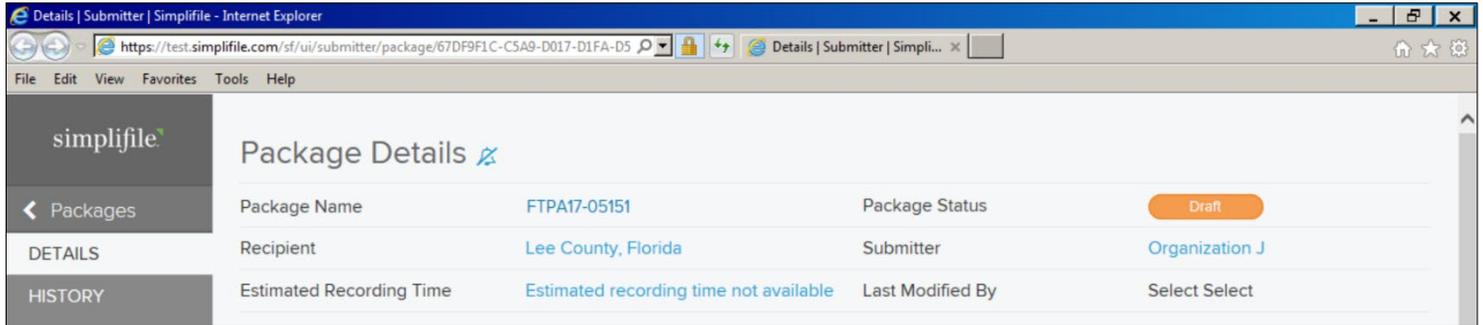
19. Click the **Submit** button

IMPORTANT: Reviewing the documents is required and allows you to avoid,

〉 potential rejection fees because of not being in recordable format

〉 CRRAR reporting errors

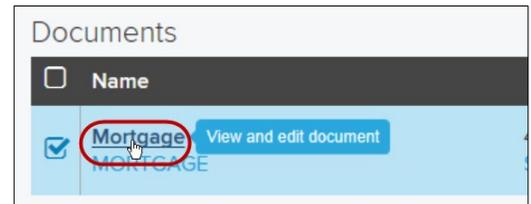20. From the **Package Delivery Complete** window, click the **Review** button
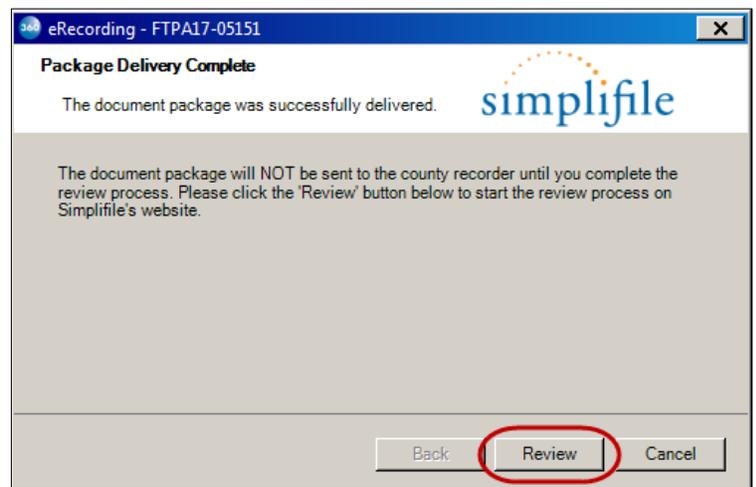
The Simplifile screen is then opened in your Browser.

Reviewing the Document

21. In the **Name** field, click the name of your document to view your document

> NOTE: The Type of document appears below the Name of the document. This link allows you to change the type of document being recorded. Be sure to click the correct link.

22. Verify the document meets the County recording standards

    a) Document fits within the blue lines on all sides shown in the review window

    b) Grantors names are correct

    c) Grantees names are correct

    d) Consideration (if applicable) is correct

NOTE: Click the **red** **View County Requirements** more/less bar to view a short list of their requirements. This is not an all-inclusive list. Refer to the County's website for all recording requirements.

23. Check the **This document is recordable** check box when your review is complete

24. Click the **Done** button

25. Click the **Submit** button to submit the document for recording

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

Updating a Submission

A Status of **Updated** indicates that Simplifile requires additional information before documents may be recorded. If you see this,

1. Highlight the entry in the **360 Queue**
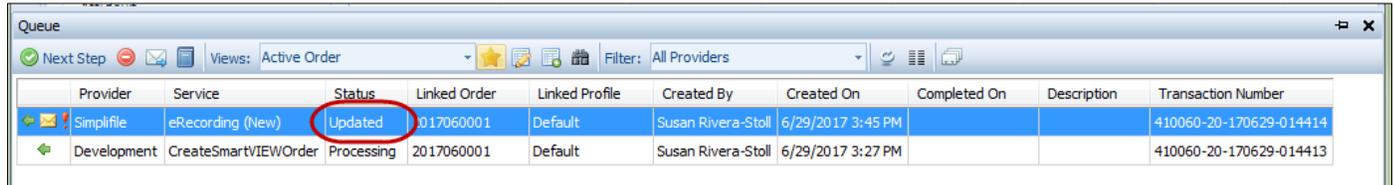
2. Click the **Log** icon to determine what is needed

3. Click **OK** to close the **Log**

4. Double-click the entry that requires updating

5. Log in to Simplifile

6. The program opens to the **Simplifile Document Delivery** window; continue the process from **Step 13** above to make corrections and resubmit


Cancelling a Submission

As long as a submission displays the **Status** as **In Progress**, you may cancel the submission. From the **360 Queue**,

1. Highlight the submission you wish to cancel

2. Click the **Cancel** icon

3. From the **Cancel** window, check the **I Agree** check box; this cancels the submission in SoftPro **and** with Simplifile; click the **Next** button
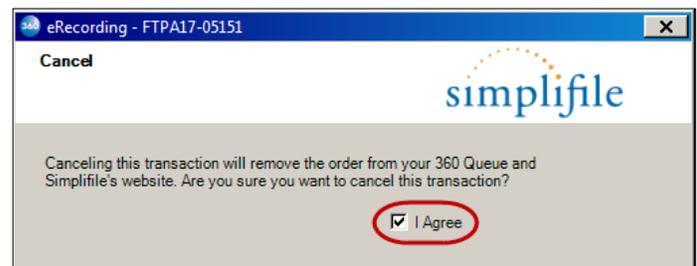
4. Click **Finish** to confirm cancellation

A confirmation email is sent from Simplifile that the submission has been cancelled. The **Status** of the submission is then changed to **Canceled** in the **360 Queue**.
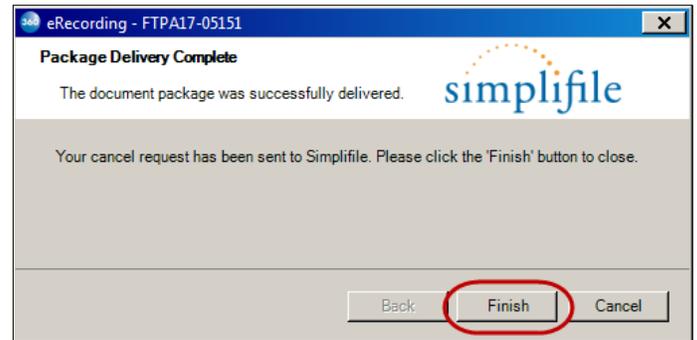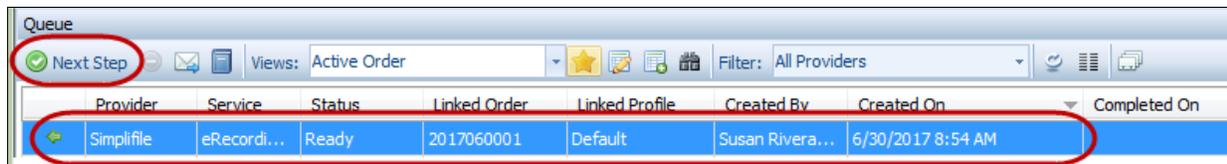

Reviewing and Accepting the Recorded Transaction

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

To review and accept the information in SoftPro Select,

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

〉 From the **Groups** section click the document type on the left (e.g., Deed, Mortgage, etc. – this varies depending upon the type of document submitted)

〉 The information to be written to SoftPro Select is displayed to the right; this includes the,

〉 Recording Fees for that document

〉 Recording Data for that document

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

⟩ 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 Simplifile and overwrites the **Current Value** data.

If you wish to view the recorded document(s), in the **Documents** section,

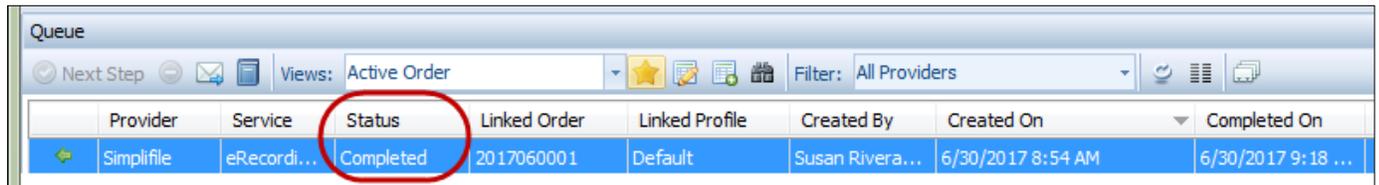⟩ In the **View** column, double-click the pdf 📄 icon to open the document
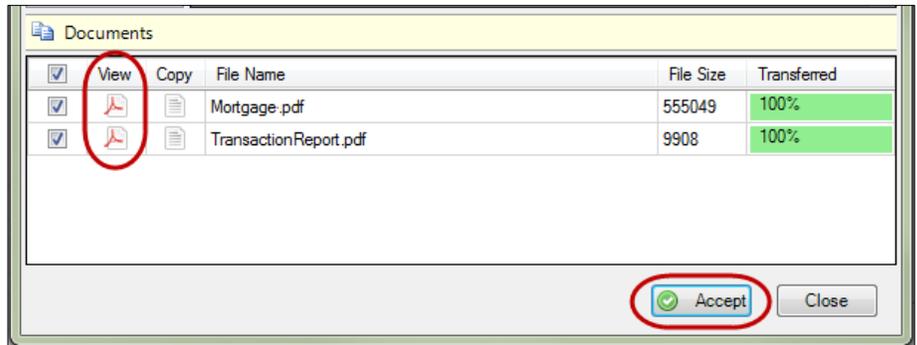

To upload information to SoftPro Select,

⟩ 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
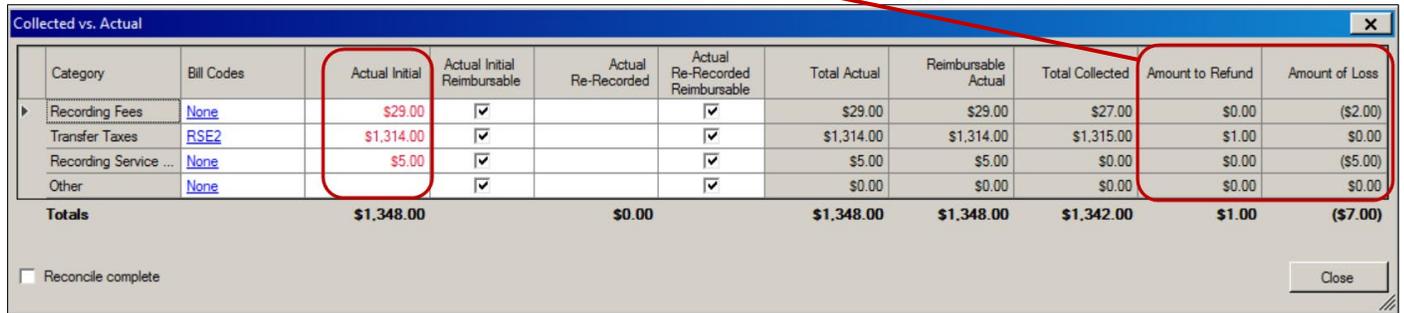
⟩ **Status** is set to **Completed** in the 360 Queue

⟩ Recording data (from Simplifile) is written to the corresponding fields for the document on the applicable screen (i.e., Deed, Security Instruments, etc.)
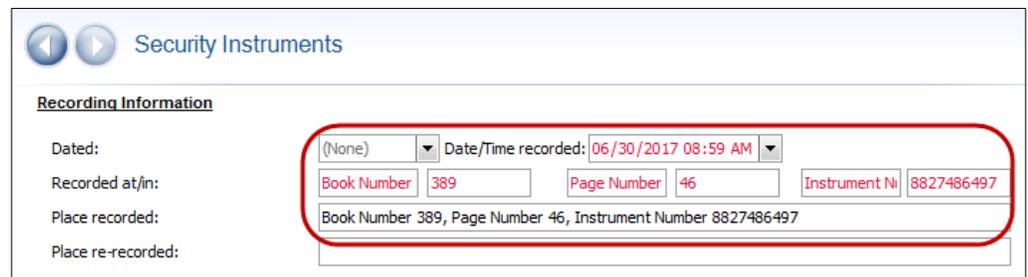
〉 Actual recording fees are written to the **Collected vs. Actual** screen in SoftPro Select; refer to your State's Recording Charges job aid if an overage/shortage exists

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
Totals		$1,348.00		$0.00		$1,348.00	$1,348.00	$1,342.00	$1.00	($7.00)

☐ Reconcile complete   Close

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