



ePrepare®

## Administrative Guide

### FOR ACCOUNT ADMINISTRATORS

Discover how to navigate the ePrepare application, manage user accounts, and customize settings to streamline your organization's document workflow!

MAY 2025

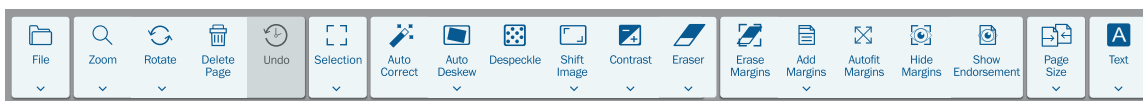


CSC offers electronic recording (eRecording) services for real estate documents, enabling clients to securely and efficiently record documents nationwide. As a pioneer in this space, we deliver both speed and reliability to support smooth real estate transactions. Our intuitive, web-based platform reduces the time between closing and recording, minimizes errors that lead to rejections, and enhances document tracking for greater operational efficiency. To learn more about our comprehensive paper and electronic recording services with coast-to-coast coverage, please visit <https://www.cscglobal.com/service/erecording>.

We're ready to talk.

📞 1 855 200 1150    @ csc-help@cscglobal.com    🖱️ [cscglobal.com](https://www.cscglobal.com)

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Welcome to **ePrepare's Administrative Guide**! Here, you'll learn how to navigate the application, manage user accounts, customize global settings, and much more.

This guide provides an essential overview of our application, showing you how individual users tailor local settings to fit their workflows, while administrators can adjust global settings to affect all users within your account. We'll also highlight key features to help you effectively manage your administrative responsibilities.

Our Support Team offers interactive [webinars](#) where they demonstrate the eRecording process and answer any questions you may have. Training is complimentary for both you and your document preparers, so be sure to register for a session today!

For general users, we offer the [ePrepare User Guide](#) to help them get familiar with the application. Additionally, a variety of user guides are available, so be sure to check the last page of this guide for a list of helpful resources.

**Questions?** Contact our Support Team. **Ready to start?** The guide begins on the next page!

## CONTENTS

3	Login to ePrepare	11	Requesting Help from CSC
4	Worklist View	12–13	County Knowledge
4	Unable to Find a Package?	14	Managing User Accounts
5	Worklist Contents	15	Viewing User Log
6	Package View	16	Adding User Accounts
7	Creating New Packages	17	User Roles
8	Document View	18	Locking   Unlocking User Profiles
9	Document Editing Toolbar	19	User Settings
10	Indexing Documents	20–22	Global Settings
11	Handling Rejection	23	Resources



<sup>1</sup>DISCLAIMER — You are solely responsible for the image content of your uploaded document, and CSC shall not be liable for any loss caused by your manipulation of any document image.

Our editing toolbar offers limited options for all counties in California and Missouri, and some counties in New Hampshire and Ohio. For more information, see page 9 of this guide.

For questions about possible legal ramifications resulting from manipulation of document images, consult with your in-house legal counsel or a qualified real estate attorney.

## DOCUMENT SCANNING BEST PRACTICES

- ✓ Prefer **letter-quality** (300 dpi) to retain detail with text and graphics.
  - ✓ Use **letter** 8.5 × 11 or **legal** 8.5 × 11 document presets.
  - ✓ Scan in **black and white** for the smallest file sizes.
  - ✓ Text must be **legible** — typically 8–12 points in size.
  - ✓ For the best results when scanning documents, we recommend installing TWAIN drivers for your printers and scanners. These drivers are specifically optimized for document scanning. While other methods may let you adjust the resolution of your scan (pixels per inch or **ppi**), doing so can create unusually large page sizes that may be rejected by the county.
- ePrepare displays the size of each page to help you manage this. If you notice any pages with non-standard sizes, you can use the **Page Size** button on the toolbar to easily resize them to standard letter or legal dimensions. **Do not reduce page sizes of larger documents such as maps or plats.**
- ✗ **Avoid using presets that automatically detect page sizes**, as these are primarily designed for scanning photographs. When used with documents, they produce non-standard page sizes (e.g., 8.14 × 10.56 inches), which is a common reason for document rejections. Please ensure that scanned pages are within ±0.25 inches of standard document size requirements.

We're ready to talk.

 1 855 200 1150    [csc-help@cscglobal.com](mailto:csc-help@cscglobal.com)    [cscglobal.com](https://cscglobal.com)

CONTINUED

## Login to ePrepare

ePrepare is our web-based, electronic document recording solution that allows document submitters (including title companies, banks, and law firms) to electronically record real estate documents with county offices across the U.S.

We offer support for Chrome and Edge, but our website works with other modern browsers using Chromium at their core. If you or your team prefer using another browser, feel free to try your favorite!

FIGURE 1 | <https://ep.erecording.com/>

**CSC**

**ePrepare**

SECURE SIGN IN

Username

Username

**SIGN IN**

[Can't access your account?](#)  
Contact eRecording Support at: [csc-help@cscglobal.com](mailto:csc-help@cscglobal.com)  
Call eRecording Support at: (855) 200-1150

**Not using ePrepare yet?**  
Call (435) 755-9837, toll free at (855) 200-1150, or email Corporation Service Company® at [eRecording@cscglobal.com](mailto:eRecording@cscglobal.com) to learn more about the nation's largest e-recording network.

[Follow us on Twitter](#)

FIGURE 2 | ePrepare Internet Browser Compatibility

BROWSERS	SUPPORTED?	LINKS
Chrome	✓ Yes	<a href="#">Google</a>
Edge	✓ Yes	<a href="#">Microsoft</a>

For the safest and most optimal experience, we recommend using the latest version of Chrome or Edge. However, other modern browsers using Chromium at their core should also work.

**General Browser Requirements:**

- ✓ JavaScript™ and cookies enabled
- ✓ Capable of 128-bit or better TLS encryption
- ✓ Pop-up blocker disabled

### Multi-Factor Authentication

Multi-Factor Authentication (MFA) provides an added layer of security during the login process. Once this ePrepare setting is enabled, users receive a unique verification code via the email address listed in their user profile each time they log in. Users are prompted to enter this code to complete the login process.

This feature will be available as a user setting on May 15, 2025. You can choose to enable MFA individually, or your local eRecording administrator may require it for all users within your organization.

### Users Can Self-Manage Password Resets

- ✓ **Click "Can't access your account?" to initiate a reset**  
All users can initiate password resets by clicking this link found on the login page. To prevent access to this link, Administrators can disable the following setting found in the Security section: **Global Allow Password Reset**.
- ✓ **Users are prompted for their username and email**  
Users are prompted to provide their username and email. Provided we find a match to what is stored in their user profile, they'll receive an email with a password reset token, valid for 24 hours.
- ✓ **One self-initiated password reset allowed in 24 hours**  
Contact our Support Team for exceptions.

### Password Requirements

- **Minimum of 9 characters**
- **At least 3 of the following:**
  - ✓ lowercase letters
  - ✓ uppercase letters
  - ✓ numbers
  - ✓ special characters
- **Not similar to your name**
- **Not similar to your username**
- **Not a recently-used password**
- **Not found in online searches**

### How to Choose a Good Passphrase

- **Be creative**  
Olympic2028PaperMedals!
- **Replace spaces**  
Stop!Hammer\$Time!
- **Use random words**  
Dolphin3Giraffe5Whale7
- **Use mixed metaphors**  
Golf-Interception!  
Robust!Confusion!  
#LowAnxietyModerateFear#  
FamilyWarMongering!!

### What to Avoid

- **Avoid famous quotes**  
FourScoreAnd7Years
- **Avoid personal facts**  
EagleBoyScout1986
- **Avoid keyboard patterns**  
Qwerty12345678
- **Avoid oversimplification**  
MyPassword1sPassword
- **Avoid social media details**  
MyDogsName1sFluffy  
#SeeMeOnOneSpace

## Worklist View

Below is an example of a typical worklist, or your document library. Documents are sent to counties in virtual envelopes called packages, which are created and managed here. Sort your worklist by package status, package details, or by clicking on a column header.

There are other customization options — and shortcuts to additional pages — to help you manage your eRecording experience. Below are some key points for navigating the worklist, so take a moment and see what Worklist View offers you!

**FIGURE 3 | ePrepare Worklist**

The screenshot shows the CSC ePrepare Worklist interface. At the top, there's a header with 'CSC ePrepare' and 'Upload Worklist'. Below this is a navigation bar with 'WORKLIST', 'REPORTS', and 'COUNTY KNOWLEDGE'. The main area displays a table of packages with columns for Package Name, Docs, Jurisdiction, Modified Date, Status, and Actions. A sidebar on the left shows package status filters: All (175), Preparing (2), Ready (1), Scheduled (0), Pending (3), Rejected (2), Recorded (167), and Flagged (0). Callouts point to various features: 'Shortcuts to popular features.' points to the top navigation bar; 'View application announcements using a variety of categories. See [Announcement Preferences](#).' points to the 'Announcements' link; 'Menu of all features.' points to the user profile dropdown; 'Shortcuts to ⚙ Settings and ? Help.' points to the settings and help icons; 'See [Search for Packages](#).' points to the search bar; 'Sort by package status.' points to the status filters; 'Page navigation.' points to the 'Page 1 of 7' indicator; 'Sort by package details.' points to the column headers; and 'Items per page.' points to the '25' dropdown.

Shortcuts to popular features.

View application announcements using a variety of categories. See [Announcement Preferences](#).

Menu of all features.

Shortcuts to ⚙ Settings and ? Help.

See [Search for Packages](#).

Sort by package status.

Page navigation.

Sort by package details.

Items per page.

**Helpful Document Tips**

- ✓ A package should only contain related documents. If you have a reason to send them individually, send the first and wait for it to return as recorded before sending the next document in the series. Repeat with each document, one-at-a-time. Otherwise, there's a risk that documents may record out of order.
- ✓ Non-related documents should be sent to the county in separate packages. If sent together and one document is rejected, all documents are rejected, delaying their recording.
- ✓ Documents in a package record in order of their appearance, not by how they are named or numbered. If recording order is important, verify their arrangement

## Unable to Find a Package?

An ePrepare setting called **Days to Wait Before Archiving Documents** (page 20) determines how many days recorded or rejected<sup>1</sup> packages appear on your worklist. The default is 30 days and it improves the responsiveness of very large worklists. If you can't find a package, it

may lie outside of this visibility window. Try increasing the value of the setting, or search for the package name directly. If someone inadvertently deletes a package, contact us — we can restore it for you.

### Related Setting

<sup>1</sup> **Archive Rejected Packages?** is a global setting that determines whether rejected packages also adhere to the archive setting. Only administrators can manage global

## Worklist Contents

Below is an example of a typical worklist, or your document library. Documents are sent to counties in virtual envelopes called packages, which are created and managed here. Sort your worklist by package status or details, and click on a column header to use it as a sort filter.

There are other customization options — and shortcuts to additional pages — to help you manage your eRecording experience. Below are some key points for navigating the worklist, so take a moment and see what Worklist View offers you and your eRecording team!

FIGURE 4 | Typical Scan/Upload Worklist

	PACKAGE	DOCS	JURISDICTION	MODIFIED DATE	STATUS	ACTIONS
	> MTG - V3989	1	Mecklenburg County, NC	10/01/2024 8:27 AM	Preparing	
	> DEED - R22931	1	Nassau County, NY	10/01/2024 8:25 AM	Ready	
	> HENDERSON	2	Harris County, TX	9/30/2024 3:59 PM	Ready	

Column headers can be used as sort ↓ ↑ filters.

### PACKAGE ACTION ICONS

Below are some common package actions:

- Send Package or Prepare for Resubmission
- Delete Package
- Schedule Package
- Get Help from CSC

Package lock status.

Click to open package.

Click to open County Knowledge.

See our guide: [Package Statuses](#).

### How Does a Package Become Locked?

Packages lock when a user opens a document in the package. To see who locked it, hover your mouse cursor over the lock icon:

Unlocked  
 Locked by you  
 Locked by another user

Locked by:  
Alan Moore  
 Locked by You

In addition, if a user closes their browser while the document is open, this is known as a "forced lockout" and the package remains locked until one of the following occurs:

### How To Unlock a Package Locked By Me?

- If the package is open, close all open documents, or —
- From the worklist, click the green lock icon and then click UNLOCK from the dialog box:

Unlock package

Unlock this package?

Please confirm that you wish to unlock this package

CANCEL

UNLOCK

OR

### How To Unlock a Package Locked By Someone Else?

Administrators can unlock packages locked by anyone else. From the worklist, click on the red lock icon and then click UNLOCK from the dialog box:

Unlock package

Unlock this package?

Please confirm that you wish to unlock this package

CANCEL

UNLOCK

## Package View

To open a package from your worklist, click on the package's name. Package View appears (below) and displays the package contents. The fees shown here are our estimates, based on the document type, number of pages in each document, and completed indexing.

If the estimate is significantly different than your expectations, first double-check the documents and your indexing. If you are unable to resolve the discrepancy, call or chat with our Support Team before you send the package. Below are some highlights of Package View:

**FIGURE 5 | Package View**

**CSC ePrepare** Package

Announcements Send Us Feedback Jennifer Morales

WORKLIST REPORTS COUNTY KNOWLEDGE

Package name. D500-0001

Office: Default Office

edit name | set as draft | email notifications

Franklin County, NC change

Ready

Average Turnaround Time: Same Day

Total Estimated Fees: \$874.00

SEND PACKAGE → ADD A DOC

Specify who is notified when the package returns.

Schedule Delivery Tue Oct 15, 2024 11:00 AM SCHEDULE

Send me an email when this package is sent. ☐

Scheduled time is approximate; actual transmission may be delayed up to an hour.

Send me an email notification when: ☐ Rejected ☐ Recorded

Created: Jennifer Morales 10/10/2024 1:50 PM | Last Modified: Jennifer Morales 10/10/2024 2:03 PM

	NAME/NUMBER	DOCUMENT TYPE	LAST MODIFIED	STATUS	PAGES	RECORDATION ORDER	ESTIMATED FEES	DELETE
<input type="checkbox"/>	<a href="#">Document 1</a>	Deed Has Attorney Statement	10/10/2024 2:03 PM	Ready to Send	2		\$64.00	
<input type="checkbox"/>	<a href="#">Document 2</a>	Deed of Trust	10/10/2024 2:03 PM	Ready to Send	16		\$810.00	

Flag GO DELETE PACKAGE NC JUDGMENT SEARCH

Show Audit History Report

DOCUMENT	ACTION	DETAILS	TIME	USER
<a href="#">Document 2</a>	Document Uploaded	Image Upload Successful	10/10/2024 2:03 PM	jmorales559198
<a href="#">Document 2</a>	Document Type Changed	Document Type has been changed to DeedofTrust	10/10/2024 2:03 PM	jmorales559198
<a href="#">Document 2</a>	Indexing Changed	Document indexing was changed	10/10/2024 2:03 PM	jmorales559198
<a href="#">Document 1</a>	Document Uploaded	Image Upload Successful	10/10/2024 1:50 PM	jmorales559198
<a href="#">Document 1</a>	Indexing Changed	Document indexing was changed	10/10/2024 1:50 PM	jmorales559198
<a href="#">Document 1</a>	Document Type Changed	Document Type was changed to DeedHasAttorneyStatement	10/10/2024 1:50 PM	jmorales559198
<a href="#">Document 2</a>	Document Added	Document Created	10/10/2024 1:50 PM	jmorales559198
<a href="#">Document 2</a>	Document Added	Document Created	10/10/2024 1:50 PM	jmorales559198
<a href="#">Document 1</a>	Binder Added	Document Created	10/10/2024 1:50 PM	jmorales559198

Click a document name to open it and make changes.

Delete the package.

Documents record in the order they appear. To change recordation order, **click + drag** a document's order icon up or down in the list.

Add a document to the package.

See our [Scheduled Send](#) guide.

Delete a document.

Click to see Audit History Report.

The Audit History Report shows a timeline for each document and any rejections previously received.

ePrepare can notify you when a package returns and you can automate this feature using the Notifications options found on your Settings page.



## Creating New Packages

Drag and drop a document (or a folder of related documents) onto your worklist. This is the preferred method, and offers the fastest results when using ePrepare's ability to predict document-types:

### Method #1 — Drag and Drop a Document or Document Folder

All documents must be in .PDF or .TIF format.

1. From File Explorer, drag and drop a single document or a folder of related documents ...
2. ... onto your main worklist area ...
3. From the *Create Package* dialog, enter the package name, choose an optional office, and enter a valid county ...
4. Click **ADD PACKAGE**.

— OR —

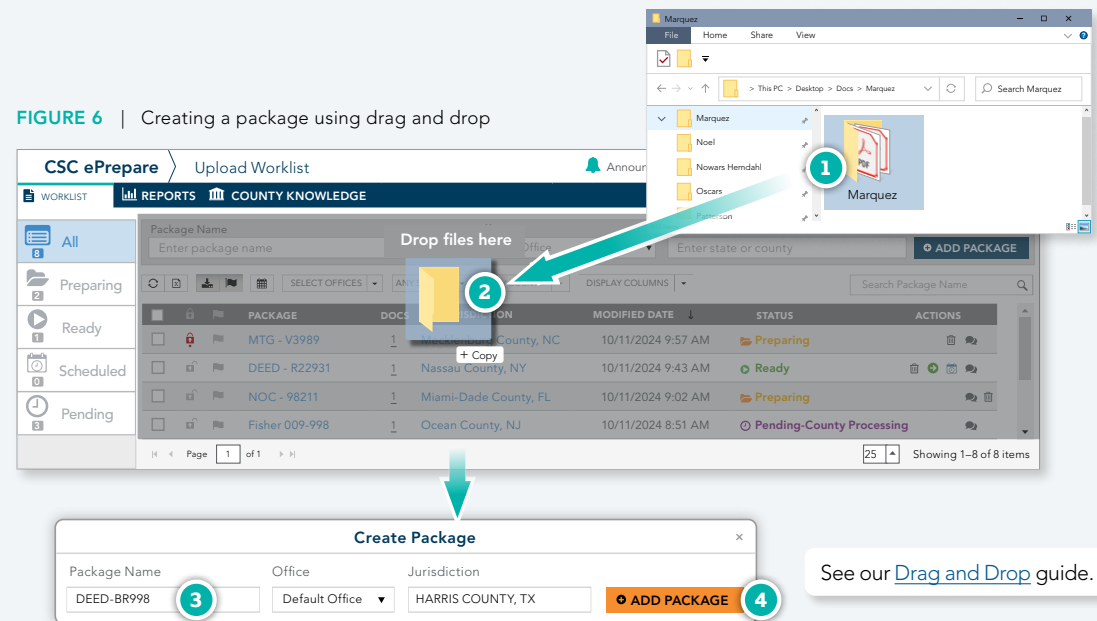
### Method #2 — Manually Enter Package Name and Destination

All documents must be in .PDF or .TIF format.

You may also enter the package name and destination directly onto the worklist, but this method for creating packages is a little slower when used with ePrepare's ability to predict document-types:

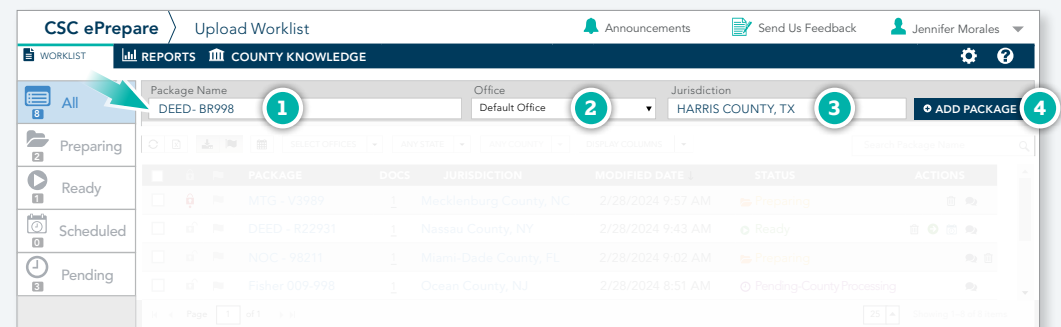
1. Enter a package name ...
2. Enter an optional office ...
3. Enter an valid county ...
4. Click **ADD PACKAGE**.

FIGURE 6 | Creating a package using drag and drop



See our [Drag and Drop](#) guide.

FIGURE 7 | Creating a package entering the package name and county



## Document View

Document View is where documents are prepared for submission. This is where you upload, edit, or replace document images. And it is where helper documents are added and indexing is done. It appears when you click on a document name to open it. Below are some highlights:

The screenshot shows the Document View interface with several callouts:

- Indexing Panel** (dark blue): Upload documents, index data.
- Page Thumbnails** (teal): Click a thumbnail to preview.
- Main Document** (dark blue): The primary document tab.
- Attachments (optional)** (dark grey): Helper docs appear in tabs.
- Document Toolbar** (red): Tools for document preparation.
- Page Preview** (orange): The selected page appears here.

The interface includes a sidebar with document details (Robertson Mortgage, Harris County, TX), a main document area with a toolbar and a large preview of the selected page (Page 1 of 2), and a bottom section for document preparation (Indexing, Document Type, etc.).

### Document Preparation Includes Several Steps

- ✓ **Optimization** — removal of scanning artifacts and image enhancement. A few counties do not permit this and insist that uploaded images match their paper counterparts exactly. In these situations, the document toolbar may offer limited functionality.
- ✓ **Managing Helper Documents** — required attachments like tax forms, cover pages, etc.
- ✓ **Indexing** — Some counties require indexing of party names, consideration or loan amounts, document references, etc. This data may be used to calculate recording fees and to facilitate public searches for land records on county websites. Recording fees are often calculated on indexed information, so be accurate!



## Document Editing Toolbar

Our document editing toolbar is automatically available in any internet browser, and it appears during document preparation. Some buttons expand to display additional options, and a widget at the bottom of the document preparation window offers several color

variations, including icon- and text-only versions. A small number of counties do not permit changes to uploaded documents, including image enhancements — so in these situations, the toolbar may offer limited functionality. We offer additional information below:

FIGURE 9 | The default document editing toolbar

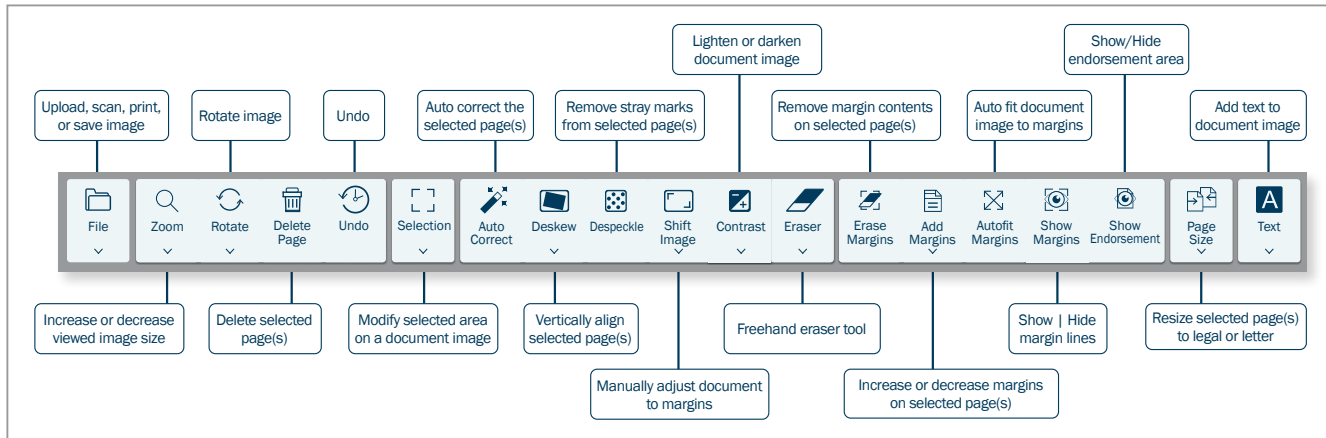
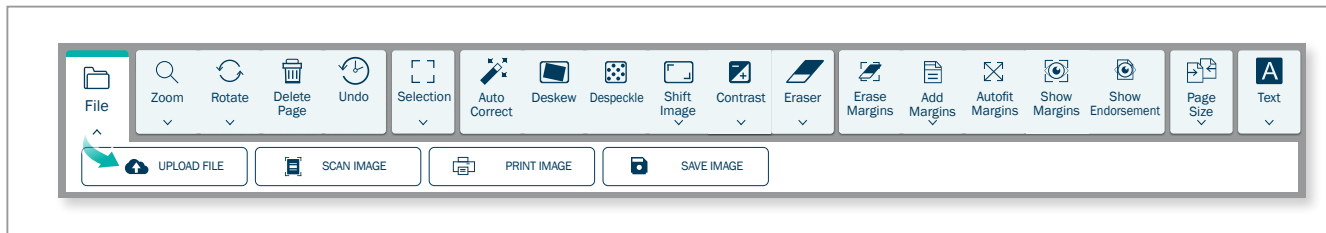


FIGURE 10 | Some toolbar buttons expand to offer applicable options



### Important Notice About Manipulating Scanned Document Images

Some counties have expressed concerns about the potential use of editing tools to modify scanned documents improperly. They emphasize that eRecording submissions should exactly match the paper originals in every detail.

As an eRecording vendor, CSC understands that county recorders are the final authority in determining what is acceptable for recording. In response to these concerns, we have proactively disabled certain editing toolbar functionalities for some counties in Ohio and New Hampshire, as well as for all counties in California and Missouri.

When submitting documents to these counties, CSC kindly requests that our customers refrain from using their own tools to alter scanned document images. Counties reserve the right to temporarily or permanently suspend your organization's ability to submit documents if they suspect any violations.

For guidance on the legal implications of modifying scanned images, please consult with your in-house legal team

### Affected Counties

- **California**  
All Counties
- **Missouri**  
All Counties
- **New Hampshire**  
Rockingham County
- **Ohio**  
Defiance County    Paulding County  
Fulton County       Williams County  
Henry County       Wyandot County  
Mercer County

## Indexing Documents

Indexing requirements are determined by the county or their software provider. The data may be posted on the county's website to facilitate online searches for recorded documents.

The contents of the indexing panel may change, depending on the selected document-type and how you respond to some questions, and a general example is shown below:

FIGURE 11 | Indexing

**Robertson Mortgage**

Miami-Dade County, FL [County Knowledge](#)

Document 1

**FL STATUTE 695.26 (click here)**

**Prepare Image**

[Open File](#) or [Scan](#)

**Document Type - Jurisdiction Type**

Mortgage - MOR [Accept Suggestion](#)

**Indexing**

**Borrower**

☐ Person ☐ Company [Add](#)

☒ Robertson, Belle [x](#)

**Lender**

☐ Person ☐ Company [Add](#)

☒ Palm Grove Bank [x](#)

**Loan Amount**  ☒

Do you want a Borrower Notification Letter?

**Collected Fee Reporting**

**Estimated Fees:** \$ 1,723.58

[Save](#) [Add Doc](#) [Cancel](#)

**Document Type - Jurisdiction Type**

Mortgage - MOR [Accept Suggestion](#)

**Lender**

☐ Person ☐ Company [Add](#)

☒ Palm Grove Bank [x](#)

Grantor First Name

Grantor Middle Name/Initial

Grantor Last Name/Company

Grantor Suffix

Grantor Title

**Estimated Fees**

**Jurisdiction Fees:**

Documentary Stamp Fee	\$1,032.50
Intangible Tax	\$590.00
First Page Fee	\$10.00
Additional Page Fee	\$51.00
Indexing Fee	\$0.00
<b>Estimated Total:</b>	<b>\$1,683.50</b>

**Service Fees:**

Sales Tax	\$0.08
CSC Service Fee	\$40.00
<b>Total:</b>	<b>\$40.08</b>



**Estimated Fees Total:** \$1,723.58

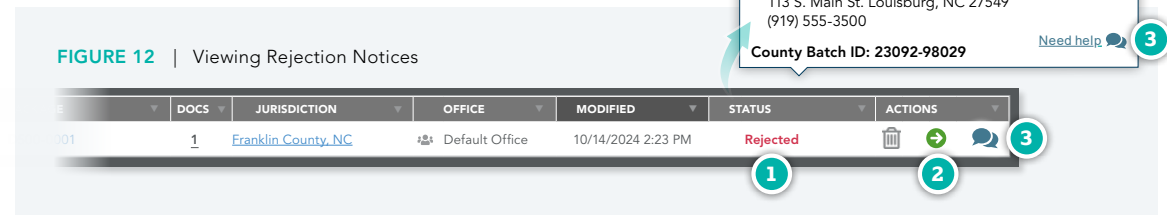
**Callouts:**

- You can accept default document names or change them for your convenience, but counties do not see this information.
- Upload a document image saved to your computer or scan one directly. If you are replacing an existing image, options are:
  - Overwrite existing image
  - Insert at beginning
  - Insert at current page
  - Add to end
- Additional options may appear if you or your organization has added optional [Customer Reference Fields](#).
- Enter one name at a time or choose one from the drop-down list, then click [Add](#).
- This name has been added to indexing. To remove it, click the [x](#) icon.
- Counties may use your document type and indexing when calculating recording fees and taxes for this document.
- Buttons are context-aware and options may change depending on the status of document preparation.
- Clicking County Knowledge opens a new pane with details for this jurisdiction.
- Notifications for this county appear here with helpful information. Click to view it.
- Based on a quick analysis of your document image, we are highly confident your document is a Mortgage.
- ePrepare can suggest a document-type based on content, but your administrator can disable this feature, if desired.
- Click on a name to expand its component name fields. Any changes will be updated when the document is saved.
- Click the [i](#) icon and a pop-up appears showing a fee breakdown. If our estimates significantly differ from your expectations, first verify your indexing for errors. If none are found, contact us before sending the package to the county. Our estimates are typically quite accurate.
- Service Fees apply but your administrator controls whether they are viewable.

## Handling Rejection

Rejections occur for a variety of reasons. Typically, an explanation is included when the package is returned to you. Once you understand the reason for the rejection, prepare the package for resubmission, make any needed corrections, and then successfully resubmit it.

1. Locate the rejected package on your worklist and click the status **Rejected** to view the rejection message ...
2. Click the  **Prepare for Resubmission** icon. The package opens, allowing you an opportunity to make corrections before resubmitting the package ...
3. Or click the  **Chat** icon to ask us for assistance. Choose from one of the three options illustrated below.



## Requesting Help From CSC

If you want our assistance with the rejection, there are three options:

Chat with us. You may not see this option if your administrator disables this option for security reasons.

For urgent matters, please call us.

Email us and we'll reply as soon as possible ... during business hours, typically within 10–60 minutes.

1. If you choose **email**, please choose a **main category** and a **sub-category** (if one appears) to help us route your question to the appropriate support team member ...
2. Let us know how we can help you ...
3. Check here if our Paper Fulfillment Team is involved ...
4. Send us your email by clicking **SEND**.

**FIGURE 13 | Getting Help with Rejections**

Get Help With "M500-0001"

**Fill out and submit this form to receive help with ePrepare**  
For Common Questions, please see the submitter guides [HERE](#)

**Three Options:**

**Chat with someone now:**

**Or talk with someone now:**  
ePrepare Support: 855-200-1150 Option 2

**Or email our support team:**  
To help us more quickly assist you, please select the category that best describes the nature of your request:

1 Please make a selection

2 What do you need help with? (be specific with at least 25 characters)

Which doc(s) are you experiencing trouble with?  
Document 1 (Deed of Trust)

3 ☐ My package is being sent to CSC for paper fulfillment


Email Address  
jennifer.morales@companydomain.com

CANCEL SEND 4

## County Knowledge


ePrepare offers a county knowledge page offering information about each available county in our eRecording network. You may search by county name or by state abbreviation, as illustrated below:

### Searching by County Name

1. From the shortcuts bar, click  **COUNTY KNOWLEDGE ...**
2. Begin typing a county name. For this example, we'll type "wak" ...
3. Select a county from the matching pop-up list.

or

### Searching by State Abbreviation

1. From the shortcuts bar, click  **COUNTY KNOWLEDGE ...**
2. Type a comma, a space, and a valid state abbreviation. For this example, we'll type ", NC" and then wait for a moment for the search matches to appear ...
3. Select a county from the matching pop-up list.

#### SEARCH RESULT



An example appears on the next page.

FIGURE 14 | Searching County Knowledge by County

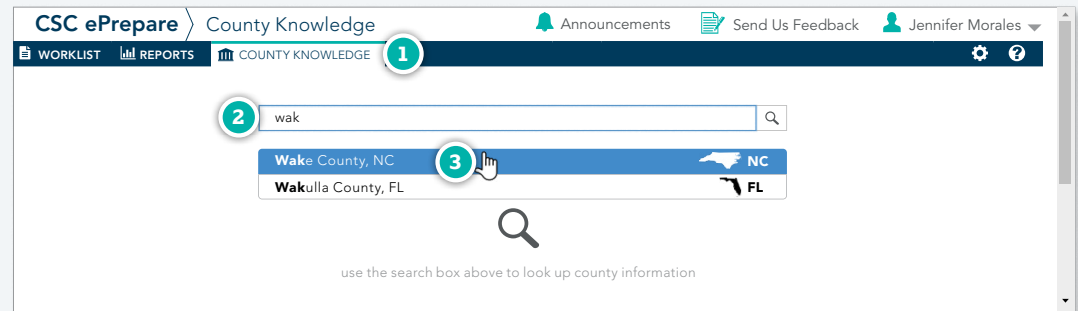
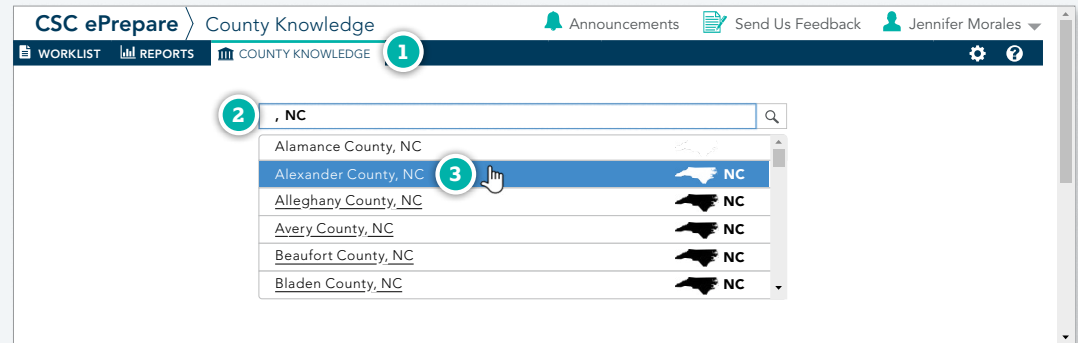


FIGURE 15 | Searching County Knowledge by State



**Example**

Here is an example of a search result.

View county contact information and if pre-authorization is required for submissions.

See pending packages for your organization and the recent average recording time.

View your organization's pending packages for this specific county, if any.

View notes created by your organization.

FIGURE 16 | Wake County NC example

CSC ePrepare

County Knowledge

Announcements

Send Us Feedback

Jennifer Morales

WORKLIST

REPORTS

COUNTY KNOWLEDGE

Wake County, NC

Wake County, NC

Wake County Justice Center 300 S. Salisbury St., Ste 1700 Raleigh, NC 27601

(919) 856-5460

rodinfo@wakegov.com

http://www.wakegov.com/rod/Pages/default.aspx

Mon-Fri 8:30 a.m.-4:45 p.m. ET • PROCESSING HOURS MAY VARY

Submitter Authorization Required: Yes

Status: Unverified

View Authorization

JUDGMENT SEARCH

Jurisdiction Notes

0

total notes 0

view all notes

Compliance Time: 30 days

ADD A NOTE

Recording Queue

0

documents in queue

View Details

Average Recording Time

< 1

Same day based on county operating hours and time of submission

View Details

Document Types

188

available documents

View Details

Recording Queue

Package Name	Docs	County	Status	Date Created	Date Modified	Estimated Date
The queue is clear of documents at this time						

Organization Notes on Jurisdiction

ADD A NOTE

Subject	Last Updated	Author	Category	Estimated Date
No notes for this jurisdiction				

Accepted Documents

Document Name	Type
Addendum	Scan/Upload
Affidavit	Scan/Upload
Affidavit of Adverse Possess	Scan/Upload
Affidavit of Affixation	Scan/Upload
Affidavit of Corr Transfer Tax	Scan/Upload
Affidavit of Heirship	Scan/Upload
Affidavit of Merger	Scan/Upload

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See if your organization created any notes for this county and view compliance time.

View the number of document-types available for this county.

Add a new note for this county.

View a list of available document-types.

## Managing User Accounts

User profiles are created and managed from ePrepare's Users page. To open this page, follow the illustrated steps below:

### Who Can Manage User Profiles?

Any user assigned the **Organization Admin** or **Access Admin** user role.

1. Login to ePrepare. In the upper-right corner, hover the mouse cursor over your name ...
2. When the user menu appears, click **Users** or **User Info** ...
3. For security purposes, enter your ePrepare login password when prompted ...
4. Click **AUTHENTICATE** ...

FIGURE 17 | Opening the Users Page

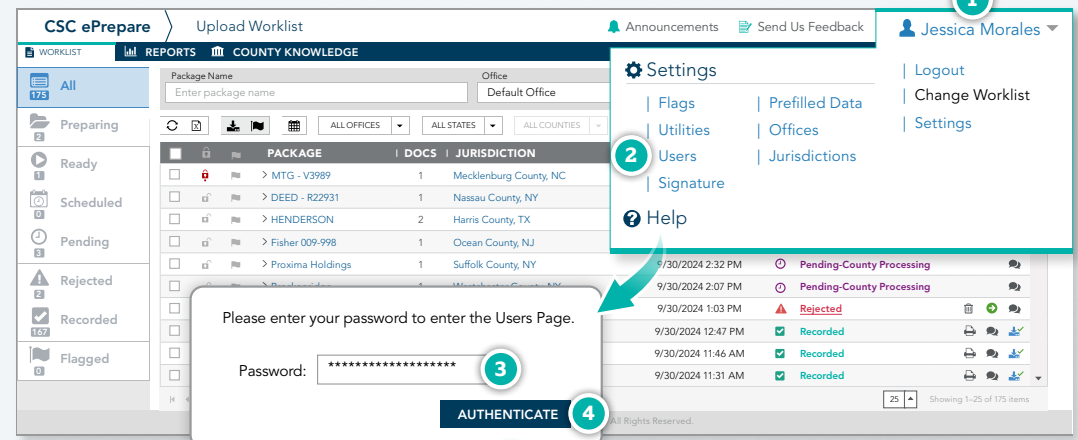
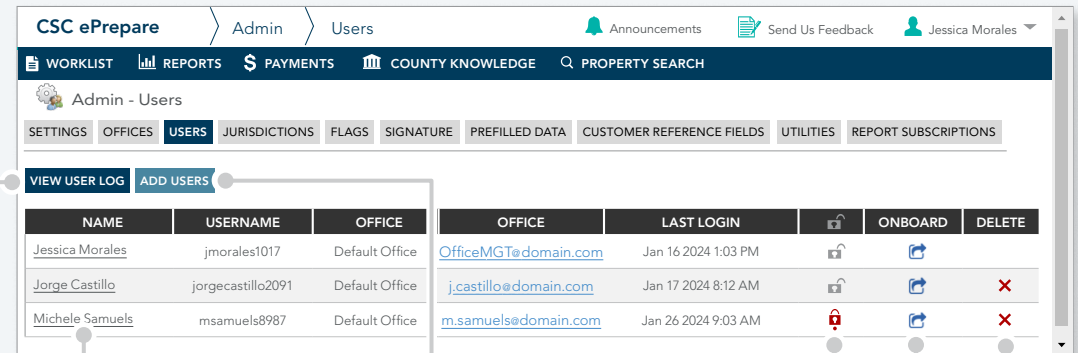


FIGURE 18 | User Profiles Page



### Administrator Accounts are Protected

Each eRecording account must have at least one administrator profile. If your eRecording account has only one administrator, you cannot delete it without first creating a secondary administrator profile to take its place.

To delete an administrator profile, click on the user's name to open the profile, remove the **Admin** and **Notary** roles, then save the changes. You can then delete the profile by clicking the new delete **X** icon.

Click a name to open their profile.

Click to add a new profile.

Click to lock/unlock.

Click **X** delete it.

Click to view the user log, which displays a helpful summary for each user profile.

Click to email them their username and a password reset token, valid for 24 hours.

# Viewing User Log

The User Log displays helpful statistics for all of your user profiles, such as lock status, last login and password change, and assigned roles.

## To See How to Open This Page —

Review page 14 of this guide.

1. From the *Users* page, click **VIEW USER LOG** ...

## The User Log Shows Helpful Information

The User Log displays helpful statistics for each user and the table can be exported to Excel format. You may find it useful when comparing roles for unintentional discrepancies. For example, both Jorge and Michele are supposed to have identical roles, but Michele is missing the **Send** role.

2. Click the  download icon to export the table to Excel.

FIGURE 19 | User Profiles Page

CSC ePrepare

Admin > Users

AnnouncementsSend Us FeedbackJessica Morales

WORKLISTREPORTSPAYMENTS COUNTY KNOWLEDGEPROPERTY SEARCH

Admin - Users

SETTINGS OFFICES **USERS** JURISDICTIONS FLAGS SIGNATURE PREFILLED DATA CUSTOMER REFERENCE FIELDS UTILITIES REPORT SUBSCRIPTIONS

1VIEW USER LOGADD USERS

NAME	USERNAME	OFFICE	OFFICE	LAST LOGIN		ONBOARD	DELETE
Jessica Morales	jmorales1017	Default Office	<a href="#">OfficeMGT@domain.com</a>	Jan 16 2024 1:03 PM			
Jorge Castillo	jorgecastillo2091	Default Office	<a href="#">j.castillo@domain.com</a>	Jan 17 2024 8:12 AM			✗
Michele Samuels	msamuels8987	Default Office	<a href="#">m.samuels@domain.com</a>	Jan 26 2024 9:03 AM			✗

FIGURE 20 | The User Log

VIEW USER LOGADD USERS

2

NAME	USERNAME	STATUS	LAST LOGIN	LAST PASSWORD CHANGE	ROLES
Jessica Morales	jmorales1071		Feb 14 2024 2:41 PM	Jan 16 2024 1:17 PM	Organization Admin, Enter Data, Sign, Notarize, Send, View Returned Items, Signer Manager, County Manager, Accounting, Approve Templates, Real Estate Searches, Account Admin, Access Admin, View Reports
Jorge Castillo	jorgecastillo2091		Feb 14 2024 8:12 AM	Jan 17 2024 9:01 AM	Enter Data, Sign, Notarize, Send, View Returned Items
Michele Samuels	msamuels8987		Feb 14 2024 9:03 AM	Jan 17 2024 9:51 AM	Enter Data, Sign, Notarize, View Returned Items



## Adding User Accounts

The following steps illustrate how to add user profiles to your account:

### To See How to Open This Page —

Review page 14 of this guide.


### Choose Complex Usernames

Username must be unique and complex variations are more secure. For instance, if Andy's employee number is 4021, use a complex variation like **asargeant4021**. Avoid simple variations like **asargeant**.

1. From the *Users* page click **ADD USERS** ...
2. When the *Add a User* dialog appears, enter a username, and the user's first name, last name, and email address ...
3. Assign an optional office, if you use this feature ...
4. Optionally, add the user's title and address information ...
5. Select at least one role (if you select **Organization Admin**, then all roles will be selected for you) ...
6. To create the profile and onboard it, click **ADD USER**.

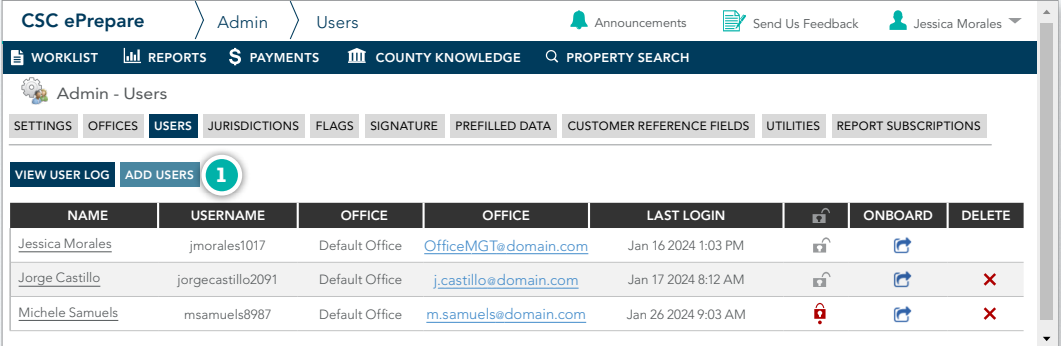
### Onboarding is Automatic

ePrepare will automatically email new users with their username and a link to create their login password, valid for 24 hours, as shown in Figure 23.

If the user's password link expires before they are able to use it, just open the Users Page and click the user's Onboard  icon to send them a new onboarding email, valid for another 24 hours.

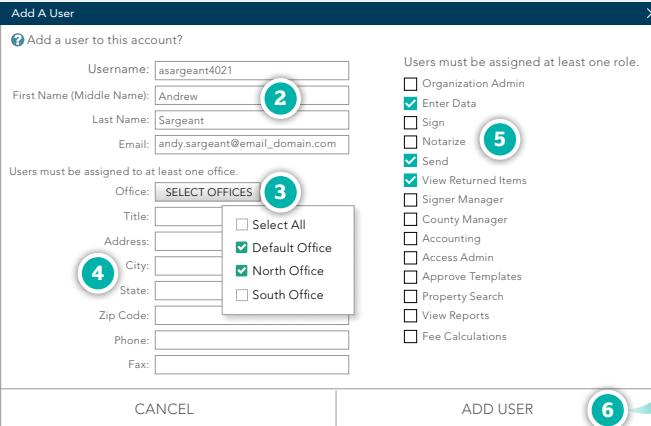
Onboarding emails do not invalidate current passwords nor force a user to action — users are free to ignore this email.

FIGURE 21 | User Profiles Page



NAME	USERNAME	OFFICE	OFFICE	LAST LOGIN		ONBOARD	DELETE
Jessica Morales	jmorales1017	Default Office	OfficeMGT@domain.com	Jan 16 2024 1:03 PM			
Jorge Castillo	jorgecastillo2091	Default Office	j.castillo@domain.com	Jan 17 2024 8:12 AM			✗
Michele Samuels	msamuels8987	Default Office	m.samuels@domain.com	Jan 26 2024 9:03 AM			✗

FIGURE 22 | Adding a User



Add A User

Add a user to this account?

Username: asargeant4021

First Name (Middle Name): Andrew

Last Name: Sargeant

Email: andy.sargeant@email\_domain.com

Users must be assigned to at least one office.

Office: SELECT OFFICES

Title:

Address:

City:

State:

Zip Code:

Phone:

Fax:

Users must be assigned at least one role.

☐ Organization Admin

☒ Enter Data

☐ Sign

☐ Notarize

☒ Send

☒ View Returned Items

☐ Signer Manager

☐ County Manager

☐ Accounting

☐ Access Admin

☐ Approve Templates

☐ Property Search

☐ View Reports

☐ Fee Calculations

☐ Select All

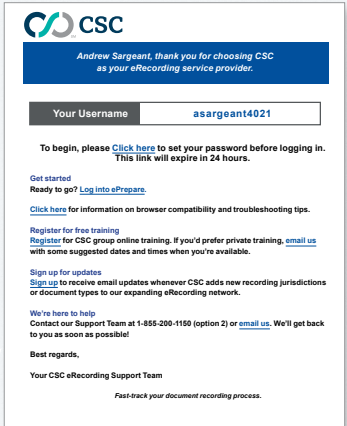
☒ Default Office

☒ North Office

☐ South Office

CANCEL ADD USER

FIGURE 23 | Onboard Email Example



CSC

Andrew Sargeant, thank you for choosing CSC as your eRecording service provider.

Your Username: asargeant4021

To begin, please [Click here](#) to set your password before logging in. This link will expire in 24 hours.

Get started

Ready to go? [Log into ePrepare](#).

[Click here](#) for information on browser compatibility and troubleshooting tips.

Register for free training

Register for CSC group online training. If you'd prefer private training, [email us](#) with some suggested dates and times when you're available.

Sign up for updates

[Sign up](#) to receive email updates whenever CSC adds new recording jurisdictions or document types to our expanding eRecording network.

We're here to help

Contact our Support Team at 1-855-200-1150 (option 2) or [email us](#). We'll get back to you as soon as possible!

Best regards,



Your CSC eRecording Support Team

Fast-track your document recording process.

## User Roles

Each user profile must have at least one role associated with the profile. Roles define the abilities of each user. Assign as many roles as needed and ignore any that do not apply to your workflow or organization.



FIGURE 23 | ePrepare's User Roles

User Role	Description	Notes
Organization Admin	Automatically selects all roles.	The <b>Sign</b> and <b>Notarize</b> roles appear but must be manually selected, if they are needed.
Enter Data	Permits indexing data for documents.	Counties often use this data to calculate recording fees, applicable transfer or stamp taxes, etc.
Sign	Permits digitally signing applicable documents.	Requires a CSC digital signature file. For more information, see <a href="#">Digitized Signature Form</a> .
Notarize	Permits digitally notarizing applicable documents.	Requires a CSC digital signature file. For more information, see <a href="#">Digitized Signature Form</a> .
Send	Permits sending packages to a county.	Sending a package implies your organization's consent to pay any recording fees and applicable taxes.
View Returned Items	Permits viewing returned packages.	This includes both rejected and recorded documents.
Signer Manager	Permits managing digital document signers and notaries.	
County Manager	Permits viewing ePrepare's Jurisdictions page.	For more information, see <a href="#">Managing Jurisdictions</a> and <a href="#">CSC County Authorization Guide</a> .
Accounting	Permits access to your CSC eRecording financial reports.	Click the  <b>Reports</b> virtual tab found on the shortcuts bar to view a list of available reports.
Access Admin	Permits managing user profiles for your organization.	For more information, see this guide.
Approve Templates	Permits approving L3 templates for your organization.	This feature applies to submitters who prepare virtual document images rendered from data sources.
Property Search	Permits real estate searches for your organization.	This is a fee-based service. For more information, see <a href="#">Property Search</a> .
View Reports	Permits viewing available reports for your organization.	Click the  <b>Reports</b> virtual tab found on the shortcuts bar to view a list of available reports.
Fee Calculations	Permits access to a county fee calculator service.	This is a fee-based service. For more information, see <a href="#">Calculator</a> .

## Locking | Unlocking User Profiles

Administrators can lock any user profile, preventing the user access to ePrepare. For additional information, review the material below:



### Locking User Profiles

From ePrepare's *Users* page, administrators can lock a user profile by clicking the profile's lock icon, changing it from  to .

**WHEN TO LOCK** • Consider locking user profiles for short-term absences such as maternity or short-term medical leave and notify the user.

**WHEN TO DELETE** • Consider deleting profiles that are no longer used.

### Unlocking User Profiles

From ePrepare's *Users* page, unlock a user profile by clicking the profile's lock icon, changing it from  to .

If you encounter problems, contact our Support Team at 1-855-200-1150 x2 or email [csc-help@cscglobal.com](mailto:csc-help@cscglobal.com). To expedite your request, be prepared to provide us with:

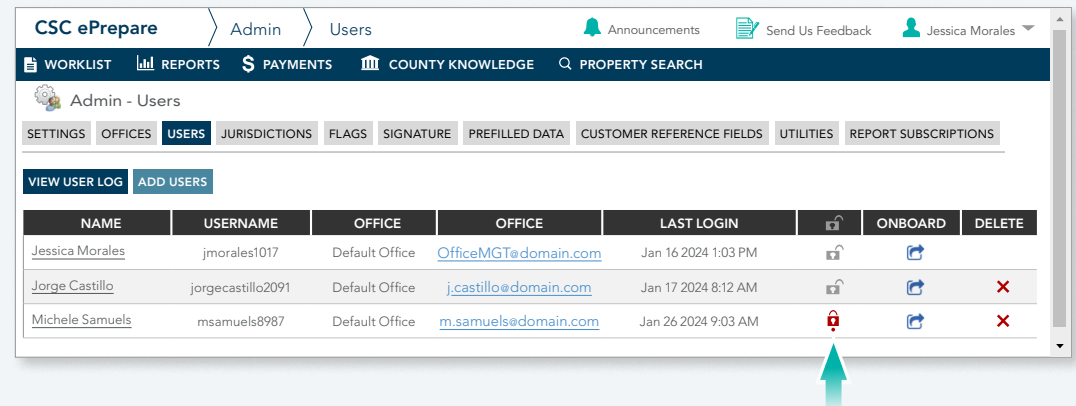
- Your ePrepare account name
- Your administrator username
- The username of the account to be unlocked

When emailing us, please use the email account found in your user profile.

### Profiles Lock Automatically After 6 Failed Login Attempts

- User profiles become locked after six consecutive unsuccessful login attempts, and then must be manually unlocked by an administrator.
- Locked accounts cannot be unlocked by the user resetting their login password, nor by an administrator sending a password reset token via an Onboarding email.
- To thwart possible attempts by third parties phishing for account names or passwords, our website discloses minimal information for failed login attempts, whenever feasible.

FIGURE 24 | Opening the Users Page



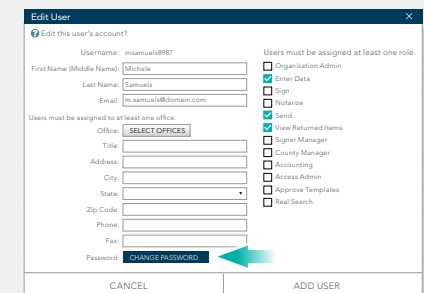
### Administrators Can Request or Force Password Changes

#### Requesting Password Changes

Open the user's profile and click **CHANGE PASSWORD**. An email is sent to the user with a password reset token, valid for 24 hours. This does not invalidate the current password so users are free to ignore these requests.

#### Forcing Password Changes

Password changes can be forced but only at specified intervals. On your *Settings* page, scroll to the *Security* section and find "Password Expiration" (select 30, 45, or 90 days — see page 21).




## User Settings

Each user customizes ePrepare through application settings. To open this page, follow the steps below:

User settings are local policies and affect only each individual user.

Figure 26 shows what a non-administrator sees for available settings.

1. Click the **Settings** icon in the upper-right corner ...
2. Use the scrollbar or the mouse wheel (if available) to scroll up or down the settings list ...
3. If a section is collapsed and the contents are not visible, click the  divider bar to expand its contents ...
4. To confirm any changes, click **SAVE CHANGES**.

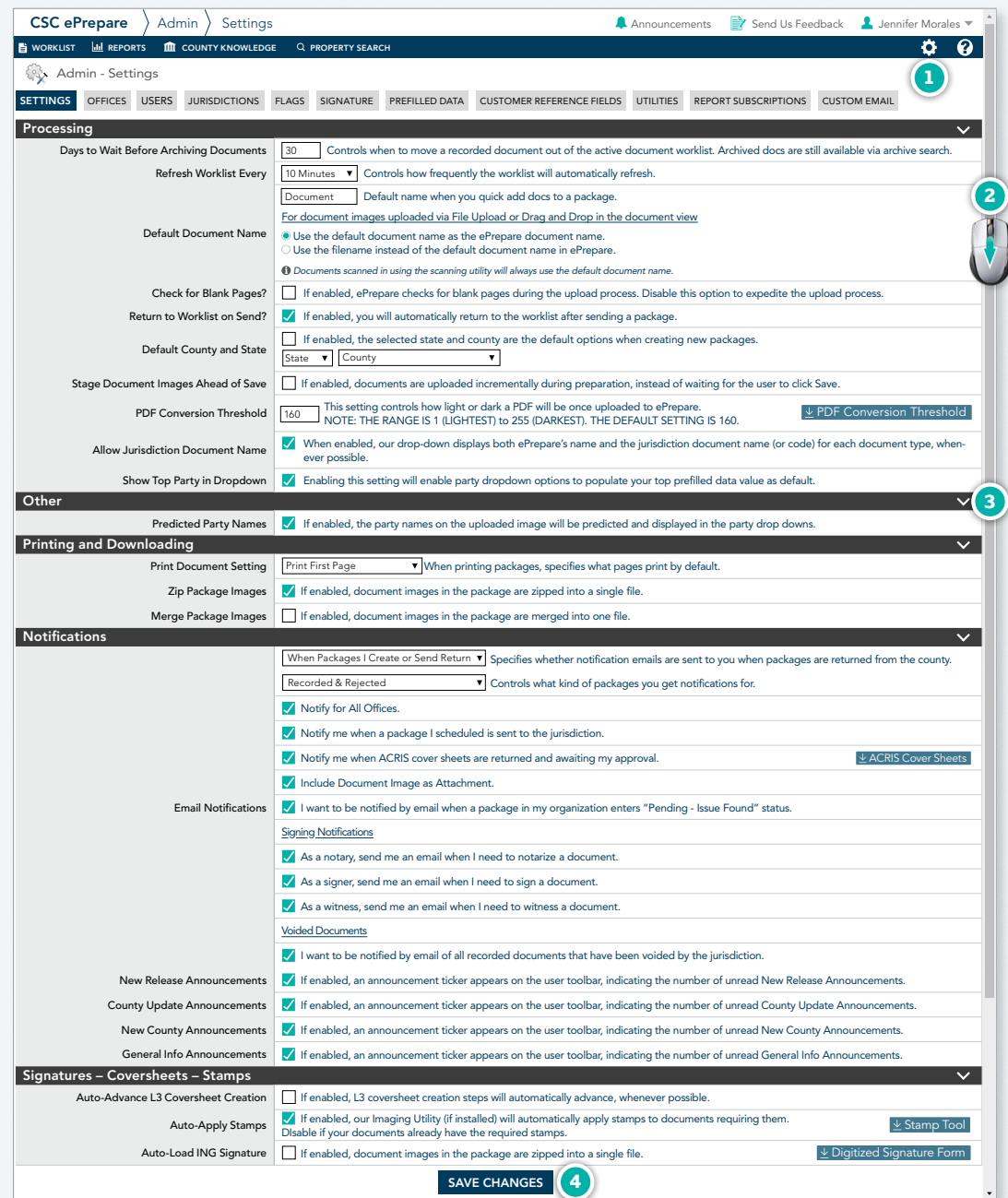
### User Settings

These are local policies and affect only the individual user.

### Settings Are Subject To Change

While we make every effort to keep this guide up-to-date, available settings are subject to change. Settings may also vary, depending on the specific configurations and requested features applied to your account.

FIGURE 25 | ePrepare User Settings




## Global Settings

Administrators also customize ePrepare through application settings. To open this page, follow the illustrated steps below.

Administrators have their own user settings, which are local policies that affect only the individual administrator.

Administrators also see **Global** settings, which are global policies that affect all users on the account, including other administrators.

Figure 27 shows what an administrator sees for available settings.

1. Click the **Settings** icon in the upper-right corner ...
2. Use the scrollbar or the mouse wheel (if available) to scroll up or down the settings list ...
3. If a section is collapsed and the contents are not visible, click the  divider bar to expand its contents ...
4. To confirm any changes, click **SAVE CHANGES**.

### User Settings

Account administrators have the same user settings as everyone else. These are considered local policies that affect only the individual user.

### Global Settings

Account administrators also see **Global** settings. These are considered global policies which affect all users, including other administrators.

For your convenience, global settings are **highlighted** at right.

### Settings Are Subject To Change

While we make every effort to keep this guide up-to-date, available settings are subject to change. Settings may also vary, depending on the specific configurations and requested features applied to your ePrepare account.

FIGURE 26 | ePrepare Administrator Settings (user and global)



**CSC ePrepare** Admin - Settings

Announcements Send Us Feedback Jennifer Morales

WORKLIST REPORTS COUNTY KNOWLEDGE PROPERTY SEARCH

Admin - Settings

SETTINGS OFFICES USERS JURISDICTIONS FLAGS SIGNATURE PREFILLED DATA CUSTOMER REFERENCE FIELDS UTILITIES REPORT SUBSCRIPTIONS CUSTOM EMAIL

**Processing**

**Global** Default File Return Format PDF Controls the default file format for saving recorded documents.

Days to Wait Before Archiving Documents 180 Controls when to move a recorded document out of the active document worklist. Archived docs are still available via archive search.

Refresh Worklist Every 10 Minutes Controls how frequently the worklist will automatically refresh.

Document Default name when you quick add docs to a package.  
For document images uploaded via File Upload or Drag and Drop in the document view

Use the default document name as the ePrepare document name.  
Use the filename instead of the default document name in ePrepare.  
Documents scanned in using the scanning utility will always use the default document name.

**Global** Require Unique Package Names? ☒ If enabled, each package must be uniquely named.

Check for Blank Pages? ☐ If enabled, ePrepare checks for blank pages during the upload process. Disable this option to expedite the upload process.

**Global** Archive Rejected Packages? ☒ If enabled, rejected packages will drop off the worklist after the specified "Archive Document" interval.

Return to Worklist on Send? ☒ If enabled, you will automatically return to the worklist after sending a package.

**Global** Allow Draft Status ☒ If enabled, the package can be set to a "Draft" step.

**Global** Default Draft Status ☐ NOTE: ALLOW DRAFT STATUS MUST BE ENABLED FOR THIS SETTING TO TAKE EFFECT  
If enabled, new packages are defaulted to a "Draft" step, allowing the package to be reviewed.

Default County and State  State  County

**Global** Allow Area Selection Tool? ☒ If enabled, the Area Selection Tool is available to modify the document.

**Global** Confirm Sending Packages from Worklist? ☒ If enabled, documents sent from the worklist require confirmation.

Stage Document Images Ahead of Save ☐ If enabled, documents are uploaded incrementally during preparation, instead of waiting for the user to click Save.

PDF Conversion Threshold 160 This setting controls how light or dark a PDF will be once uploaded to ePrepare. NOTE: THE RANGE IS 1 (LIGHTEST) TO 255 (DARKEST). THE DEFAULT SETTING IS 160. PDF Conversion Threshold

**Global** Tax Threshold Amount 5000 Document tax over this amount requires user confirmation. To disable this setting, enter 0.

**Global** Low Balance / Low Credit Limit 0.00 Subscribed users are notified via email when: (a) the balance of a draw-down account falls below this amount, (b) the available credit limit assigned to an ACH account falls below this amount. e.g., If this setting is \$500 and your credit limit is \$5,000, you will receive an email notification when you have \$4,500 or more in recordings.

**Global** Show Compliance Date on Worklist ☒ If enabled, a "Compliance" column will be displayed on the Entry, Sign, and Notarize worklists.

**Global** Scheduled Send ☒ If enabled, users may schedule packages to be sent at a future date/time. If desired, specify default settings below:  
Please set your default days out and time:  
Business Days Out: 3 Time: 11:00 AM

**Global** Collected Fees vs Actual Fees Tracking ☒ If enabled, allows you to track and report on the recording fees collected from your customer compared to the actual recording fees charged by the county.

**Global** NC Courts Search To access the North Carolina Administrative Office of Courts lookup system for judgments and rulings from ePrepare, enter a valid NCAOC username and password:  
Username: jenmoralesdomain Password: \*\*\*\*\*

**Global** Require Payoff Date ☒ If enabled, a "Compliance" column will be displayed on the Entry, Sign, and Notarize worklists.

**Global** Required loan number ☒ If enabled, a "Compliance" column will be displayed on the Entry, Sign, and Notarize worklists.

Allow Jurisdiction Document Name ☒ When enabled, our drop-down displays both ePrepare's name and the jurisdiction document name (or code) for each document type, whenever possible.

**Global** Digital and Upload Docs in same package? ☒ If enabled, users can create both Digital and Upload documents within the same package. A Digital or Upload (Scanned Executed Image) document selector will appear on the data entry panel during document creation.

Show Top Party in Dropdown ☒ Enabling this setting will enable party dropdown options to populate your top prefilled data value as default.

**Other**

**Global** Predict Doc Types ☒ If enabled, ePrepare suggests a document type for uploaded documents.

**Global** Monthly Invoice ATTN Name ☒ Specifies an ATTN name to appear on invoices.

Predicted Party Names ☒ If enabled, the party names on the uploaded image will be predicted and displayed in the party drop downs.

**Global** Restrict Reports ☒ Allows the organization admin to restrict the reports section to users assigned to the Report role.

**Global** Show Fee Breakdown ☒ When enabled, a breakdown of jurisdiction and CSC fees will be available to view on recorded packages and documents.

**SAVE CHANGES**

FIGURE 26 | ePrepare Administrator Settings (user and global) | CONTINUED

**CSC ePrepare** Admin Settings

WORKLIST | REPORTS | COUNTY KNOWLEDGE | PROPERTY SEARCH

Announcements | Send Us Feedback | Jennifer Morales

Admin - Settings

SETTINGS | OFFICES | USERS | JURISDICTIONS | FLAGS | SIGNATURE | PREFILLED DATA | CUSTOMER REFERENCE FIELDS | UTILITIES | REPORT SUBSCRIPTIONS | CUSTOM EMAIL

**Other**

- Predict Doc Types** ☒ If enabled, ePrepare suggests a document type for uploaded documents.
- Monthly Invoice ATTN Name** ☒ Specifies an ATTN name to appear on invoices.
- Predicted Party Names** ☒ If enabled, the party names on the uploaded image will be predicted and displayed in the party drop downs.
- Restrict Reports** ☒ Allows the organization admin to restrict the reports section to users assigned to the Report role.
- Show Fee Breakdown** ☒ When enabled, a breakdown of jurisdiction and CSC fees will be available to view on recorded packages and documents.

**Printing and Downloading**

- Print Document Setting** Print First Page When printing packages, specifies what pages print by default.
- Mark Printed Documents as Downloaded** ☒ If enabled, printed documents are marked as downloaded.
- Zip Package Images** ☒ If enabled, document images in the package are zipped into a single file.
- Merge Package Images** ☐ If enabled, document images in the package are merged into one file.

**Security**

- Inactive Timeout** 60 min Specifies the amount of inactivity allowed before users are automatically logged out of ePrepare.
- Print Document Setting** Never Specifies when user passwords expire and need to be changed.
- Allow Password Reset** ☒ If enabled, users may reset their login password via the "Can't access your account?" link found on the login screen.
- Absolute Timeout** ☐ If enabled, users are logged out after the amount of time specified in Inactive Timeout, even if they are active.
- Allow Concurrent User Sessions** ☐ If enabled, multiple users will be able to sign in to a single user account simultaneously.
- Multi-Factor Authentication** ☒ If enabled, multi-factor authentication (MFA) will send a code to your email for you to enter and is required to complete the login process.
- Multi-Factor Authentication Organization Wide** ☐ If enabled, this setting will require multi-factor authentication (MFA) for all users in your organization, sending a code to each user's email to complete login. NOTE: When enabled, this overrides individual user MFA settings.

**Notifications**

- Notification of Downloaded MOU** ☐ If enabled, administrators will receive an email when any user successfully downloads an MOU from the Jurisdictions page.
- When Packages I Create or Send Return** Recorded & Rejected Specifies whether notification emails are sent to you when packages are returned from the county.
- Notify for All Offices** ☒
- Notify me when a package I scheduled is sent to the jurisdiction.** ☒
- Notify me when ACRIS cover sheets are returned and awaiting my approval.** ☒ [ACRIS Cover Sheets](#)
- Include Document Image as Attachment.** ☒
- Email Notifications** ☒ I want to be notified by email when a package in my organization enters "Pending - Issue Found" status.
- Signing Notifications**
  - ☒ As a notary, send me an email when I need to notarize a document.
  - ☒ As a signer, send me an email when I need to sign a document.
  - ☒ As a witness, send me an email when I need to witness a document.
- Voiced Documents**
  - ☒ I want to be notified by email of all recorded documents that have been voided by the jurisdiction.
- New Release Announcements** ☒ If enabled, an announcement ticker appears on the user toolbar, indicating the number of unread New Release Announcements.
- County Update Announcements** ☒ If enabled, an announcement ticker appears on the user toolbar, indicating the number of unread County Update Announcements.
- New County Announcements** ☒ If enabled, an announcement ticker appears on the user toolbar, indicating the number of unread New County Announcements.
- General Info Announcements** ☒ If enabled, an announcement ticker appears on the user toolbar, indicating the number of unread General Info Announcements.

**Signatures – Coversheets – Stamps**

- Auto-Advance L3 Coversheet Creation** ☐ If enabled, L3 coversheet creation steps will automatically advance, whenever possible.
- Auto-Apply Stamps** ☒ If enabled, our Imaging Utility (if installed) will automatically apply stamps to documents requiring them. Disable if your documents already have the required stamps. [Stamp Tool](#)
- Auto-Load ING Signature** ☐ If enabled, document images in the package are zipped into a single file. [Digitized Signature Form](#)
- Enable ACRIS Cover Sheet Preview** ☒ If enabled, ACRIS cover sheets will be returned for review and approval when attempting to send packages to the New York Boroughs.

**SAVE CHANGES**

FIGURE 26 | ePrepare Administrator Settings (user and global) | CONTINUED

CSC ePrepare

Admin > Settings

AnnouncementsSend Us FeedbackJennifer Morales

WORKLISTREPORTSCOUNTY KNOWLEDGEPROPERTY SEARCH

Admin - Settings

SETTINGS OFFICESUSERSJURISDICTIONSFLAGS SIGNATURE PREFILLED DATA CUSTOMER REFERENCE FIELDS UTILITIES REPORT SUBSCRIPTIONS CUSTOM EMAIL

Signatures – Coversheets – Stamps

Auto-Advance L3 Coversheet Creation

☐ If enabled, L3 coversheet creation steps will automatically advance, whenever possible.

Auto-Apply Stamps

☒ If enabled, our Imaging Utility (if installed) will automatically apply stamps to documents requiring them.  
Disable if your documents already have the required stamps.

Stamp Tool

Auto-Load ING Signature

☐ If enabled, document images in the package are zipped into a single file.

Digitized Signature Form

Global Enable ACRIS Cover Sheet Preview

☒ If enabled, ACRIS cover sheets will be returned for review and approval when attempting to send packages to the New York Boroughs.

Requesting Party

Company

Company Name

Address

555 Labrea

☐ Has P.O. Box

City

State

Zip

555 LabreaFL78294

Global Company Information

Legal Name

Company Name

Email

help@domain.com

Phone

(855) 555-5555

☒ If enabled, your Requesting Party will be used as the default company indexed for jurisdictional use as the Requesting Party. These default values will be overwritten by either populating them in a prefilled data template or by changing them manually in data entry.

SAVE CHANGES

 **Congratulations — This concludes our guide!**  
If you have any questions, please contact us:

 1 855 200 1150       [csc-help@cscglobal.com](mailto:csc-help@cscglobal.com)



PDF Feature Guides

Announcement Preferences

Borrower Notification Letters

Calculator ⓘ

Certified Copies ⓘ

Changing Jurisdictions

Correction Requests

Custom Email Notifications ⓘ

Customer Reference Fields

Data Extraction ⓘ

Design Custom Reports ⓘ

Doc Type Recognition

Drag and Drop

Dynamic Worklist

eChecks ⓘ

Fill Ins

Flags

Hawaii Fill Ins

Indexing Names

Jurisdiction Document Names

Managing Jurisdictions ⓘ

Master Accounts ⓘ

Multi-Titled Documents

North Carolina Judgment Search ⓘ

Notes

Office Management ⓘ

Onboarding ⓘ

Prefilled Data

Property Search ⓘ

Report Subscriptions ⓘ

Reporting Hub ⓘ

Resizable Indexing Panel

Scanning Photo IDs

Scheduled Send

Search for Packages

Self-Manage ACH Information ⓘ

Voided Packages

ⓘ This feature may be available to administrators or users with the appropriate roles. Please note that some features may require an activation fee or incur recurring charges. For complete details, refer to the applicable user guide.



PDF Document Editing Guides

Add Margins Tool

Auto Correct Tool

Auto Deskew Tool

Eraser Tool

Modifying Pages

Page Size Tool

PDF Conversion Threshold

Scanning Documents to ePrepare

Selection Tool

Shift Image Tool

Stamp Tool

Text Tool

PDF Troubleshooting Guides

Adding CSC as a Trusted Website

Clearing Cache and Cookies

Counties Prohibiting Document

ePrepare Package Statuses

Quickstart Toolbar Guide

Removing Headers and Footers


Troubleshooting Page Sizes

Troubleshooting Tips for ePrepare

PDF Supplemental Guides

Excel files are saved to your workstation's Downloads folder.

Active County List

Active County List (Excel format) 

CeRTNA | SECURE Document


ePrepare User Guide for Contractors

County Authorization Guide ⓘ

ePrepare Administrative User Guide ⓘ

ePrepare User Guide

Important Information for New Users

 Website Resources

Beginner's eRecording Guide

Register for ePrepare Training

Remote Online Notarization

Reset ePrepare password

U.S. State Holidays

California **SECURE** Portal Holidays

CSC provides electronic recording (eRecording) services for real estate documents, enabling clients to securely and efficiently record documents across the country. As a pioneer in the industry, we're committed to deliver the speed and reliability needed to support seamless real estate transactions. To support your success, we offer a comprehensive library of user guides for self-paced learning, along with interactive webinars hosted by our knowledgeable Support Team to answer your questions in real time. To learn more about our services, please visit <https://www.cscglobal.com/service/erecording>.

We're ready to talk.

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