

## ePrepare<sup>®</sup>

## User Guide

#### **FOR ALL USERS**

An introduction to ePrepare, our web-based eRecording solution for recording real estate documents!

#### APRIL 2025



CSC® provides a secure electronic document recording (eRecording) solution that allows document submitters, including title companies, banks, and law firms, to electronically record real estate documents with county offices throughout the U.S. Our system bridges the gap between submitters and county offices, and enables easier document creation on the submitter side and faster recordation, indexing, and acknowledgment on the recorder side. CSC was first to market with an eRecording solution, and our services remain the benchmark for speed, efficiency, and security. For more on how CSC can improve the way you work, visit erecording.com.

We're ready to talk.







Welcome to **ePrepare's User Guide!** This guide provides helpful tips for navigating our secure, web-based eRecording solution for real estate documents.

Our platform streamlines the process of preparing and submitting documents to the county. With ease you can upload your documents, index them with the required information, and submit them electronically for review and recording.

This overview offers a basic introduction to ePrepare, and we highly recommend <u>registering</u> for a complimentary training session. Each week, our Support Team hosts live webinars where we walk you through the eRecording process and address any questions you may have. Sign up for a session today and learn how ePrepare can simplify and enhance your document recording experience!

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

CONTE	ENTS		
3	Login to ePrepare	9	Document Editing Toolbar
4	Worklist View	10	Indexing Documents
4	Unable to Find a Package?	11	Handling Rejection
5	Worklist Contents	11	Requesting Help from CSC
6	Package View	12-13	County Knowledge
7	Creating New Packages	14	User Settings
8	Document View	15	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 some counties in Ohio and New Hampshire, and all counties in California and Missouri. 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.

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#### **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.
- Install TWAIN drivers for your printers and scanners, as they are specifically designed for document scanning. Other scanning methods may allow you to adjust document resolution (pixels per inch, or ppi), but this can result in abnormally large page sizes, potentially leading to rejections.

ePrepare displays the size of each page, and the document toolbar includes a **Page Size** button that allows you to easily resize selected pages to letter or legal size. However, please avoid resizing documents with large dimensions, such as maps or plats, as doing so may cause text and other content to become too small to be legible.

Avoid presets that automatically detect page sizes, as they are best suited for scanning photographs. When used with documents, this kind of preset often creates non-standard page sizes (e.g., 8.14 × 10.56 in), a leading cause of document rejections.

We're ready to talk.



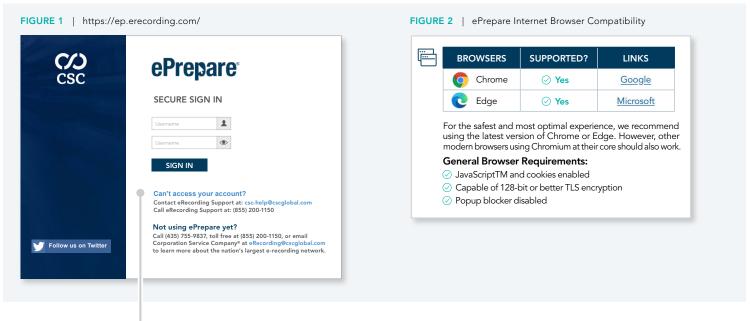




#### Login to ePrepare

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 prefer using another browser, feel free to try your favorite!



#### You Can Self-Manage Password Resets

- You can initiate a password reset by clicking this link found on the login page: Can't access your account? Your administrator can prohibit access to this link by enabling a global security setting in ePrepare.
- ☑ You are prompted to provide your username and email.

  As long as the information matches what is found in your ePrepare user profile, you'll receive an email with a password reset token, valid for 24 hours.
- Only one self-initated password reset is allowed within 24 hours. Contact our Support Team for exceptions.

## Password Requirements



- · William Of 7 Characters
- At least 3 of the following:
- lowercase letters
- uppercase letters
- numbersspecial 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



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

#### Cautions About Common Practices



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

Settings 5

| Flags

| Prefilled Data

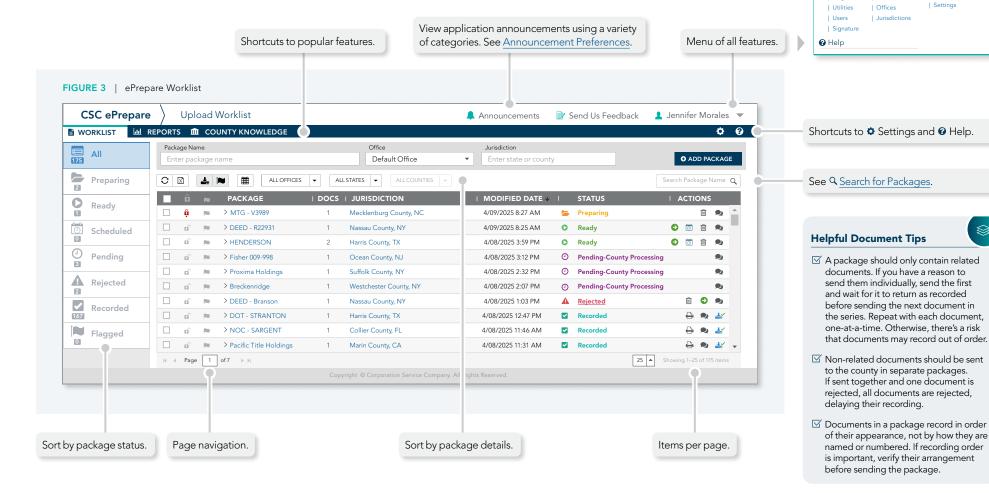
♣ Jennifer Morales

| Change Worklist

#### **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!



#### Unable to Find a Package?

There is a setting called **Days to Wait Before Archiving Documents** (page 14) which determines how many days recorded or rejected 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**

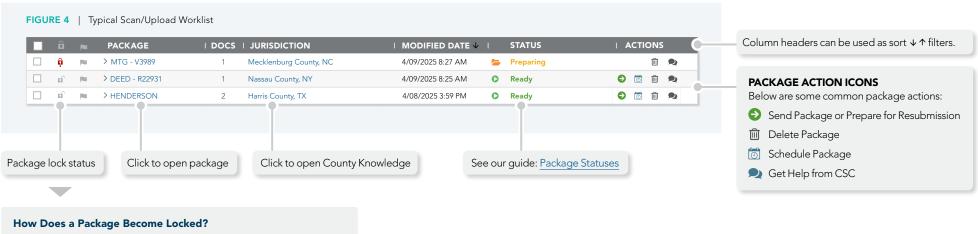


Archive Rejected Packages? is a global setting that determines whether rejected packages also adhere to the archive setting. Only administrators can manage global settings, since they affect all users.

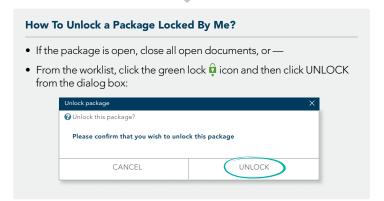
#### **Worklist Contents**

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!



## 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 Locked by: Locked by: Alan Moore Locked by You in Locked by another user



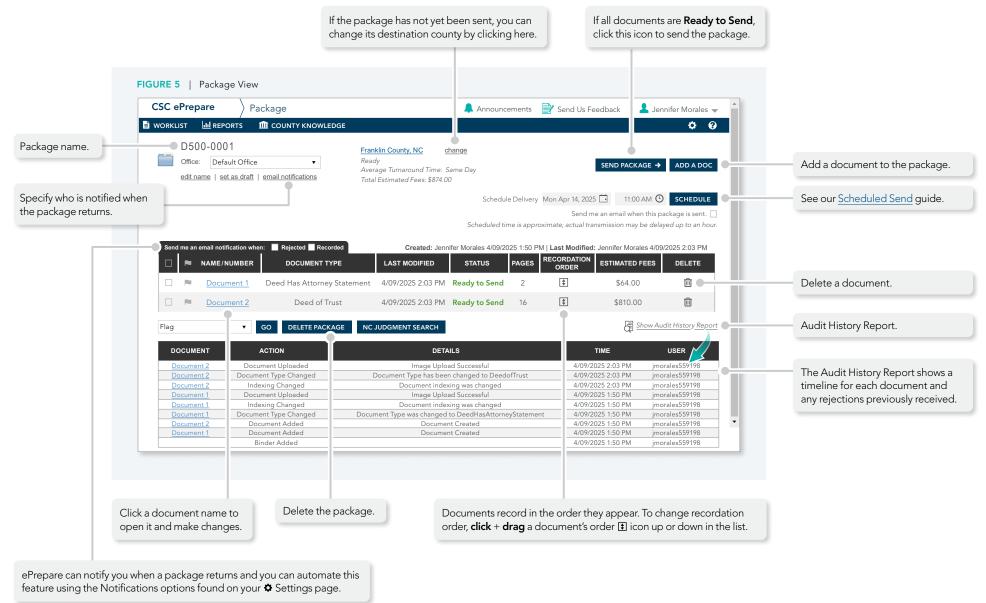
#### How To Unlock a Package Locked By Someone Else?

OR

Only administrators can unlock packages locked by someone else. Contact your administrator or ask the person who locked it for help. 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 this view:



#### **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

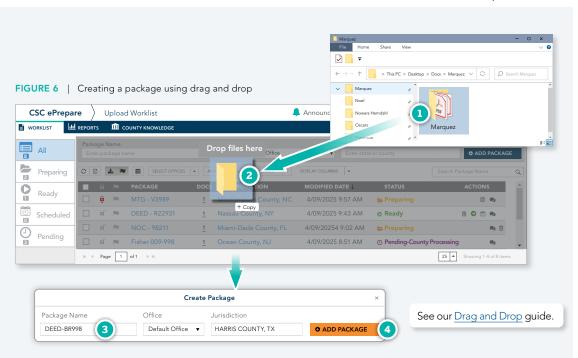
— OR —

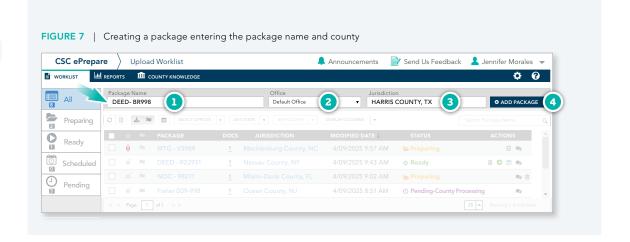
#### METHOD #2 — Manually Enter Package Name and Destination

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

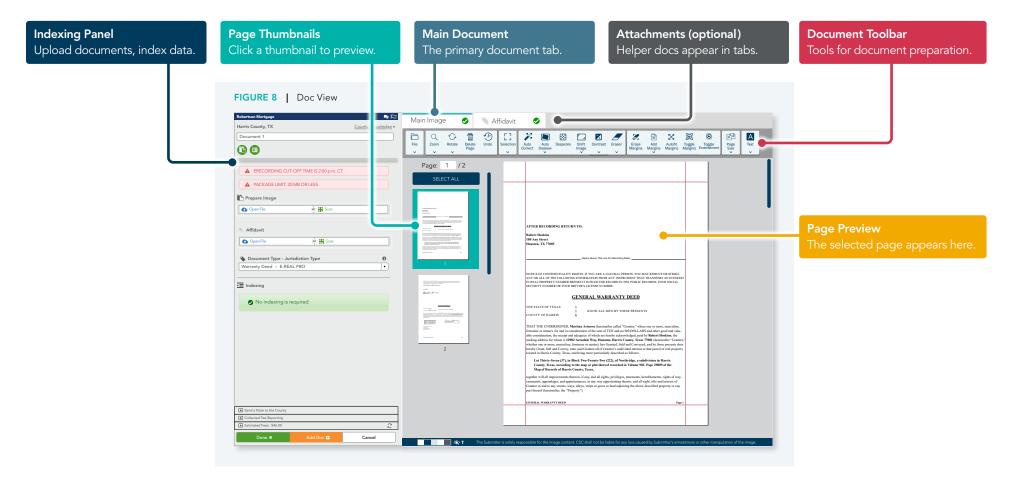
You may also enter the package name and destination directly onto the worklist, but this method for creating packages is a little slower when used with ePrepare's ability to predict document-types:

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





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:



#### **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

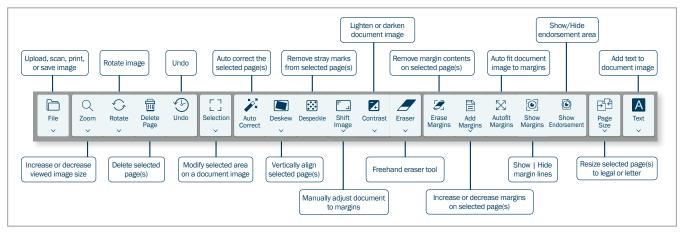


FIGURE 10 | Some toolbar buttons expand to offer additional options



#### **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.

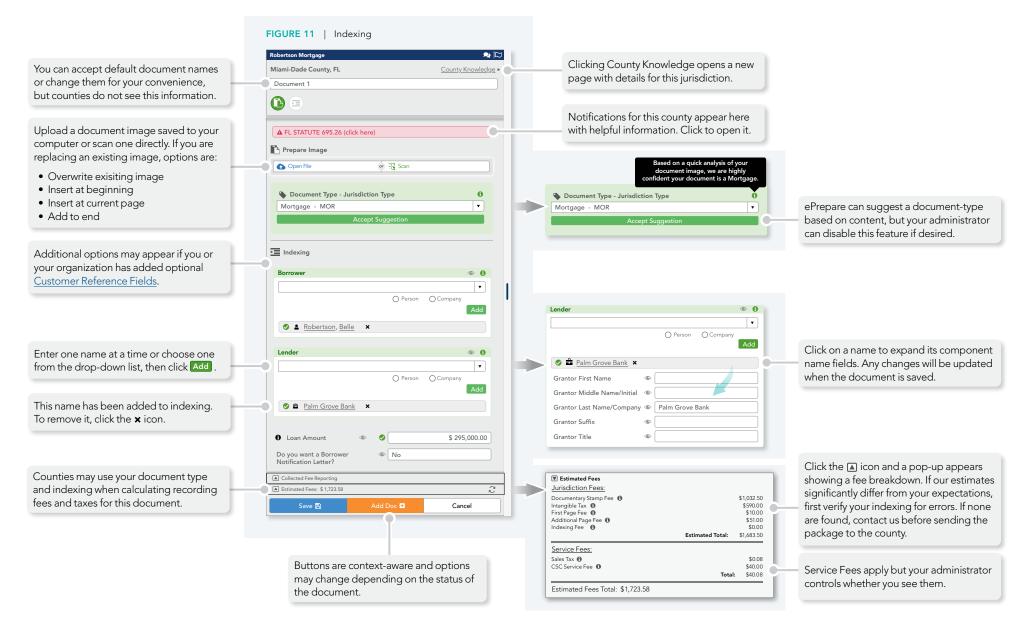
For guidance on the legal implications of modifying scanned images, please consult with your in-house legal team or a qualified real estate attorney.

# California All Counties Missouri All Counties New Hampshire Rockingham County Ohio Defiance County Fulton County AS OF DECEMBER 6, 2024 — SUBJECT TO CHANGE

#### **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.

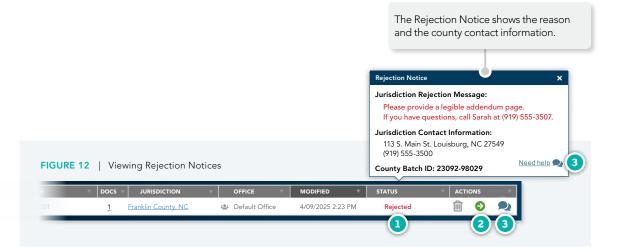
The contents of the indexing panel may change, depending on the selected document-type and how you respond to some questions, and a general example is shown below:



#### **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 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 **\textstyle Chat** icon to ask us for assistance. Choose from one of the three options illustrated below.



#### **Requesting Help From CSC**

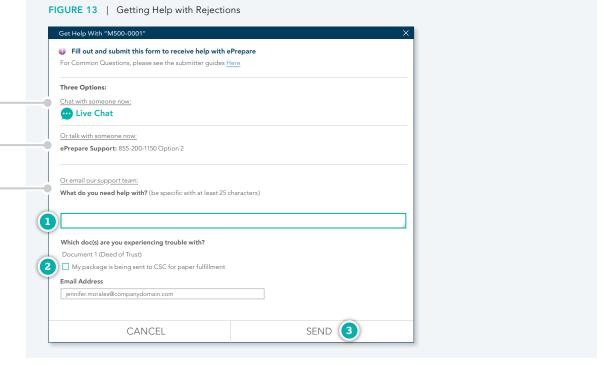
If you want our assistance with the rejection, there are three options:

Chat with a member of our Support Team. Your administrator can disable this option if your organization does not allow chat communications.

For urgent matters, please call us.

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

- **1.** If you choose the **email option** for assistance, please let us know what you need help with ...
- **2.** If you are sending the package to CSC for paper fulfillment be sure to check the appropriate box ...
- **3.** To send us your email request, click **SEND**.



12

#### **County Knowledge**

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

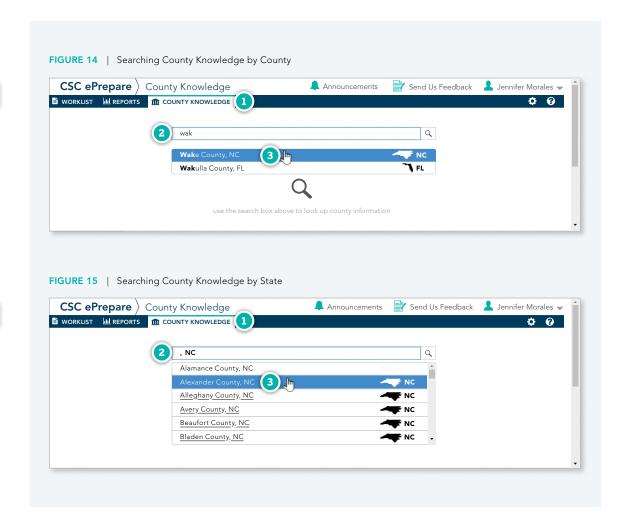
#### **SEARCHING BY COUNTY NAME**

- 1. From the shortcuts bar, click **(m)** 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.

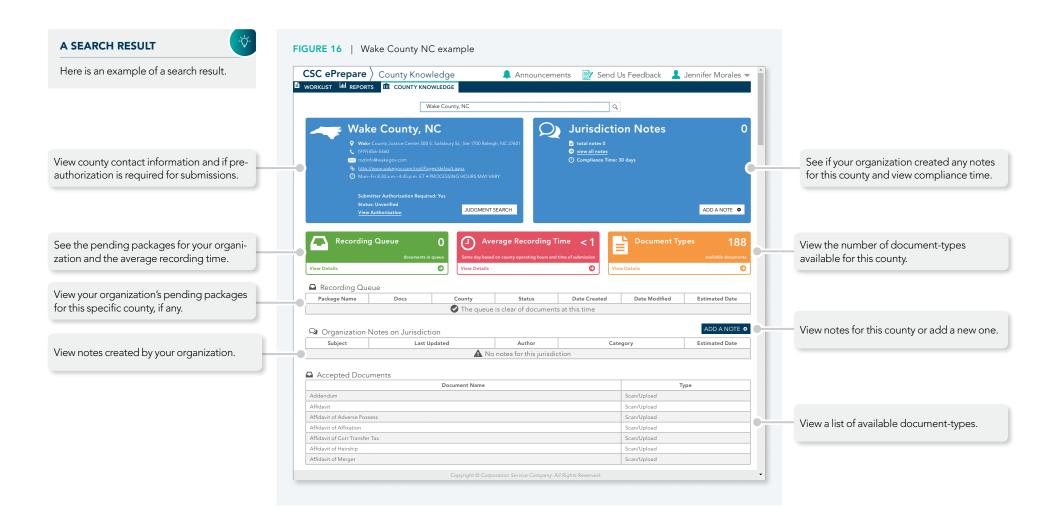
or

#### **SEARCHING BY STATE NAME**

- 1. From the shortcuts bar, click **(m)** 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.







13

#### **User Settings**

Users customize ePrepare through the application's **Settings** page. The settings shown here are considered local policies and only affect the individual user.

- 1. Login to ePrepare and click the Settings icon in the upper-right corner ...
- **2.** To view additional settings, use the scrollbar or the wheel on your mouse, if available ...
- **3.** If a section is collapsed and the contents are not visible, click the divider bar to expand its contents.
- 4. To confirm any updates, click SAVE CHANGES

#### **USER SETTINGS**



These are considered local policies and are managed by each 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.

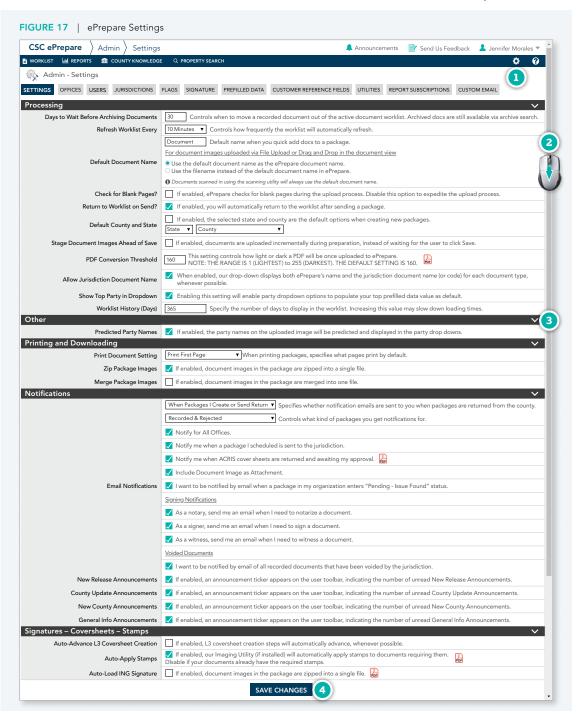
#### **THERE ARE ALSO GLOBAL SETTINGS**



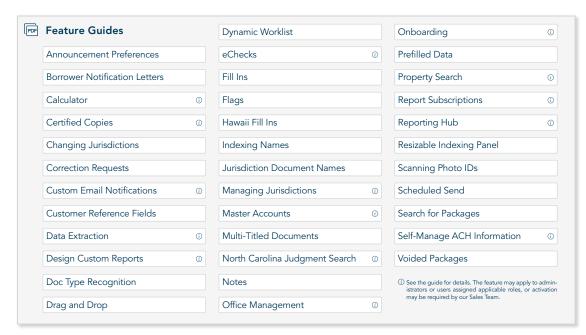




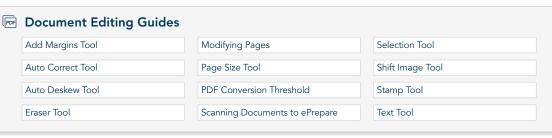
a csc-help@cscglobal.com



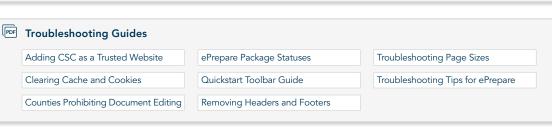








PDF	Supplemental Guides  * Excel files are saved to your Downloads folder	County Authorization Guide ①
	Active County List	ePrepare Administrative User Guide ①
	Active County List (Excel format)*	ePrepare User Guide
	CeRTNA   SECURE Document Queues	Important Information (New Users)
	ePrepare User Guide for Contractors	User Request Form ①



Beginner's eRecording Guide	Reset ePrepare password
Register for ePrepare Training	U.S. State Holidays
Remote Online Notarization	SEC®RE California Portal Holidays

CSC provides electronic recording (eRecording) Real Estate services, allowing clients to quickly and

securely record documents across the U.S. First to the market with this solution, we provide speed and security for real estate transactions. Our web-based application shortens time between closing and recordation, eliminates errors that cause rejections, and improves document tracking for more efficiency.

We're ready to talk.

To learn more about our paper and electronic county recording for seamless coast-to-coast coverage,





