

## ePrepare<sup>®</sup>

## User Guide

#### **FOR ALL USERS**

ePrepare is our web-based eRecording solution designed for fast, secure, and efficient recording of real estate documents. It streamlines the recording process, helping you reduce errors, save time, and enhance document tracking — all from one easy-to-use platform.

#### 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 recordation, 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.







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. Upload documents to our website, index required information, and submit them electronically to county offices for review and recording.

This overview offers a basic introduction to ePrepare, and we highly recommend registering 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!

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<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.

#### **➡** DOCUMENT SCANNING — BEST PRACTICES

- Prefer letter-quality (300 dpi) to retain detail with text and graphics.
- Use letter  $8.5 \times 11$  or legal  $8.5 \times 11$  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 (pixels per inch or **ppi**), doing so can create unusually large page sizes that may be rejected.
  - 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. However, please avoid resizing oversized documents such as maps or plats as this may reduce the text or content to a size that's difficult to read, causing rejections.
- 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.,  $8.14 \times 10.56$  in), a leading cause of document rejections.

We're ready to talk.





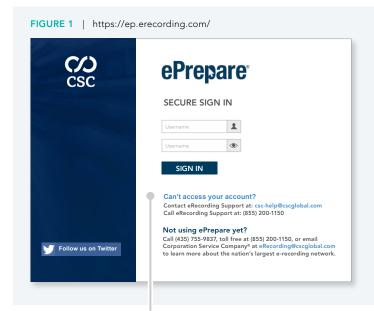




#### Login to ePrepare

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!



# FIGURE 2 | ePrepare Internet Browser Compatibility



modern browsers using Chromium at their core should also work.

#### **General Browser Requirements:**

- JavaScriptTM and cookies enabled
- ✓ Capable of 128-bit or better TLS encryption
- Popup 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 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





- · 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 Good Passphrases



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

#### Be Careful



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

| Prefilled Data

Settings 5

| Flags

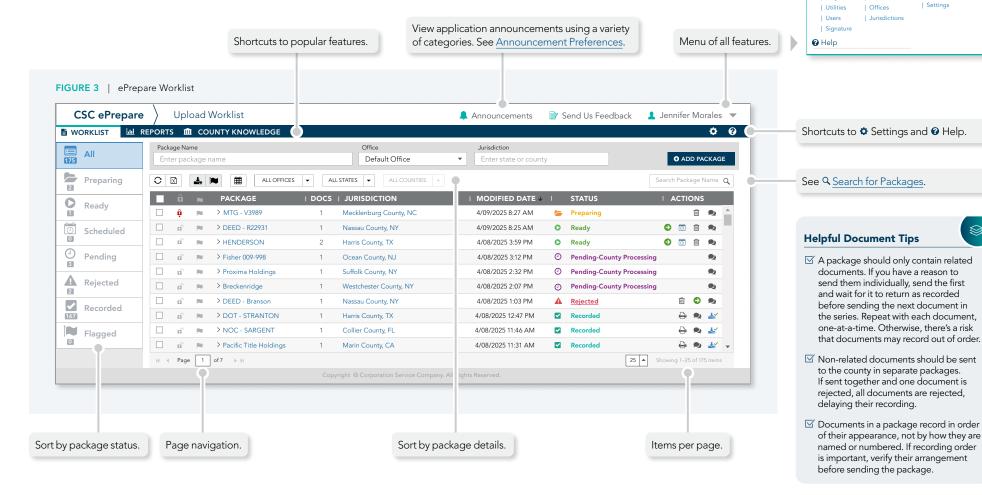
♣ Jennifer Morales 
▼

| 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

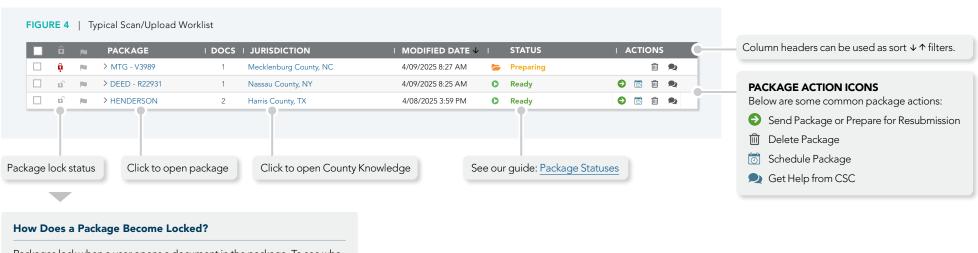


Archive Rejected Packages? is a global setting that determines whether rejected packages also adhere to the archive setting. Only administrators can manage global settings, since they affect all users.

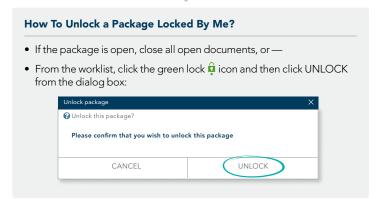
#### **Worklist Contents**

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 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 Someone Else?

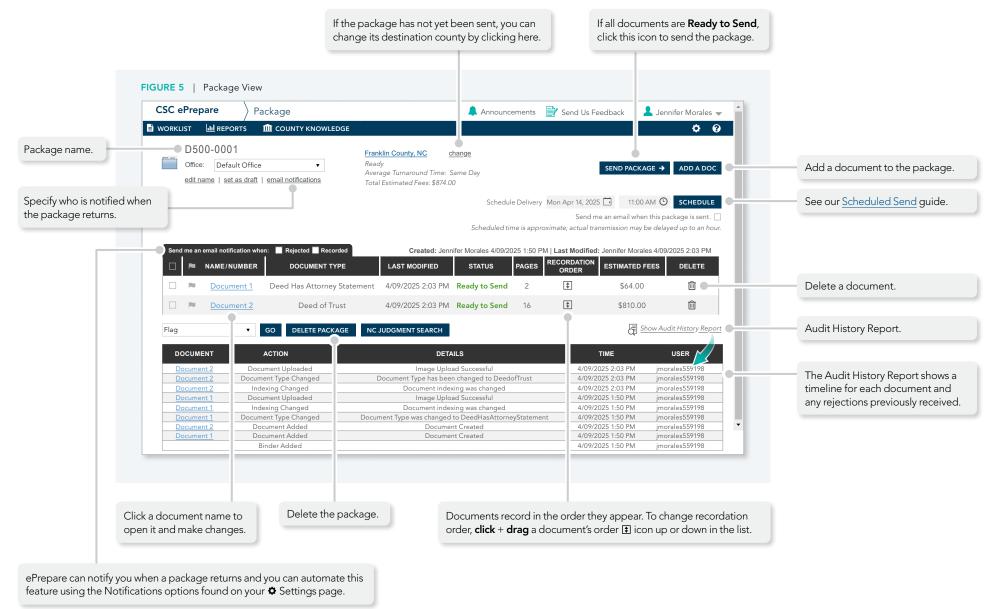
OR

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

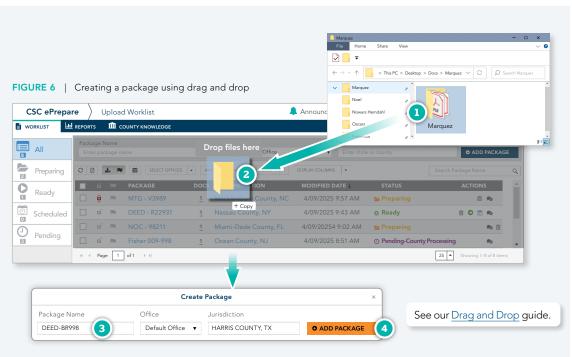
— OR —

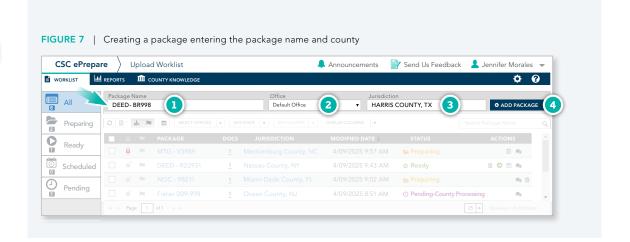
#### METHOD #2 — Manually Enter Package Name and Destination

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:

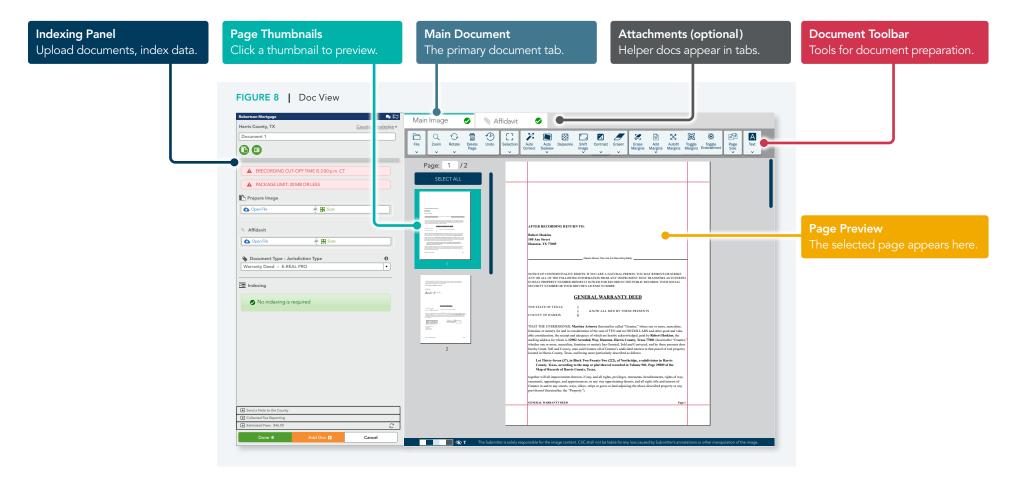
- 1. Enter a package name ...
- 2. Enter an optional office ...
- 3. Enter an valid county ...
- 4. Click ADD PACKAGE





#### **Document View**

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:



# 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.

**Document Preparation Includes Several Steps** 

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

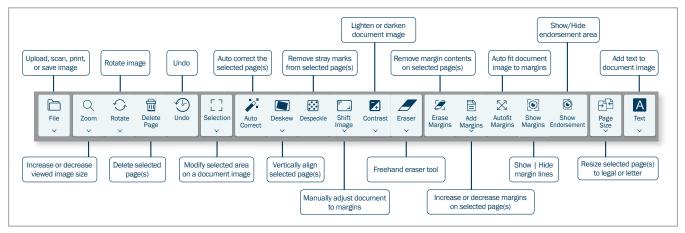
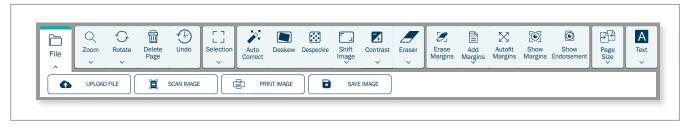


FIGURE 10 | Some toolbar buttons expand to offer additional options

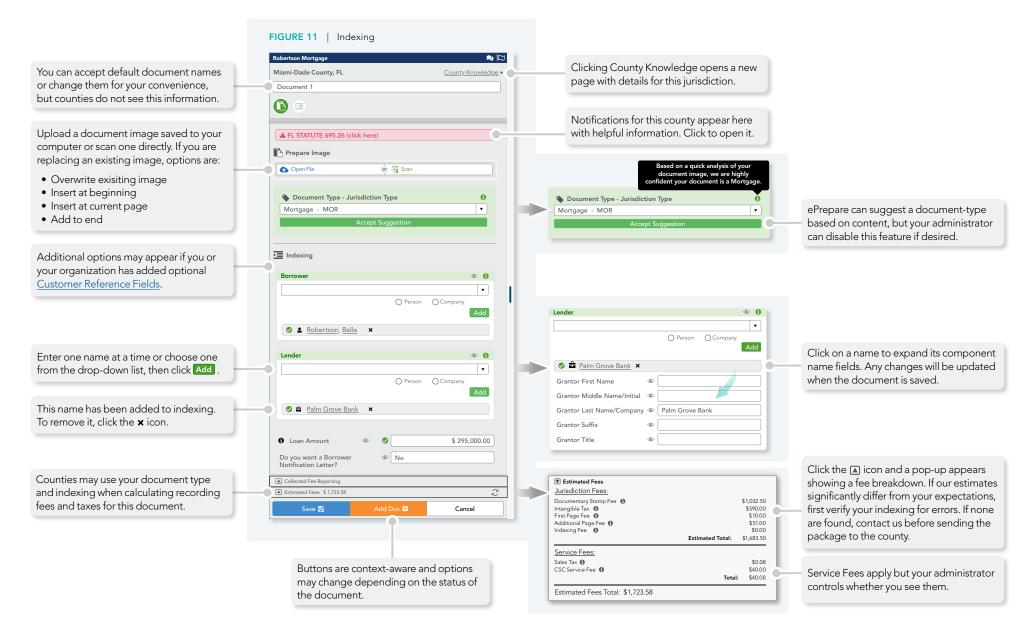




#### **Indexing Documents**

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.

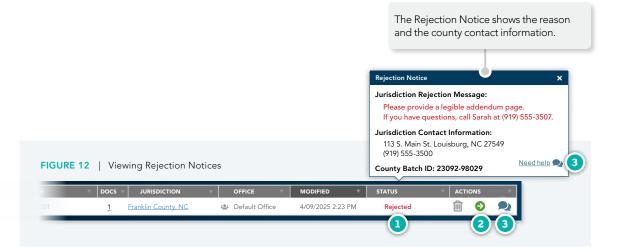
The contents of the indexing panel may change, depending on the selected document-type and how you respond to some questions, and a general example is shown below:



#### **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

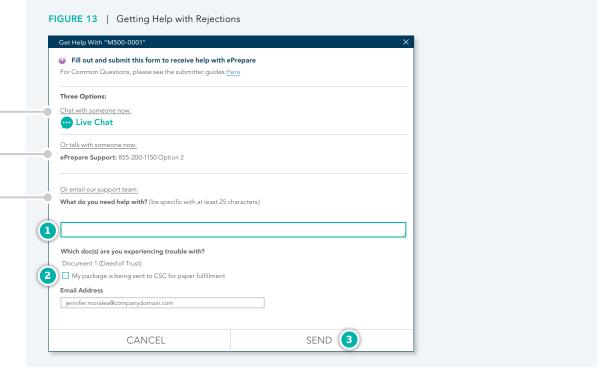
If you want our assistance with the rejection, there are three options:

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**.



#### **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:

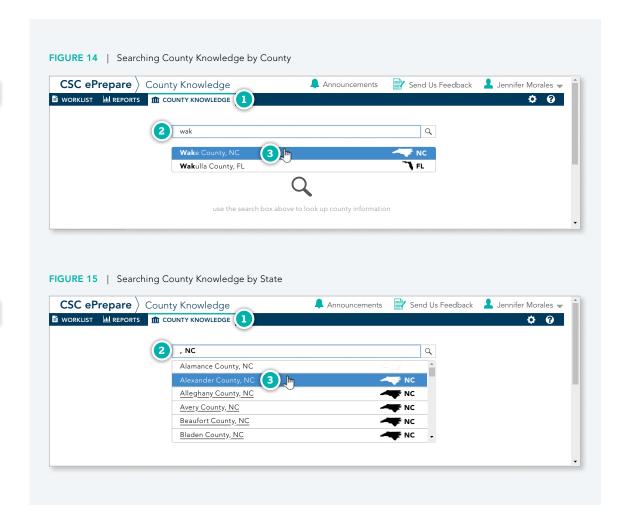
#### SEARCHING BY COUNTY NAME

- 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.

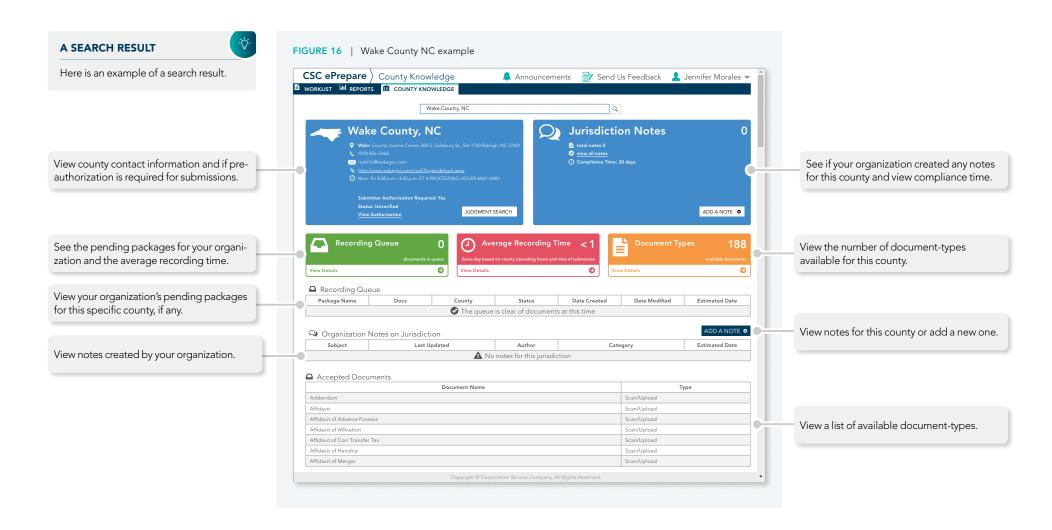
or

#### **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.







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#### **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 ePrepare account.

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

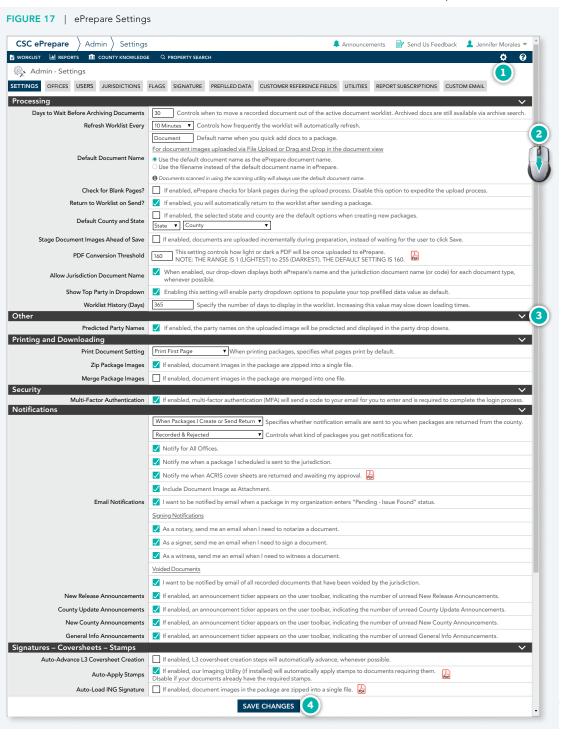


While account administrators also have their own individual user settings, they also control Global settings which affect all users on the account. For details, see <a href="Mailto:eproperties.">ePrepare Administrator Guide</a>.

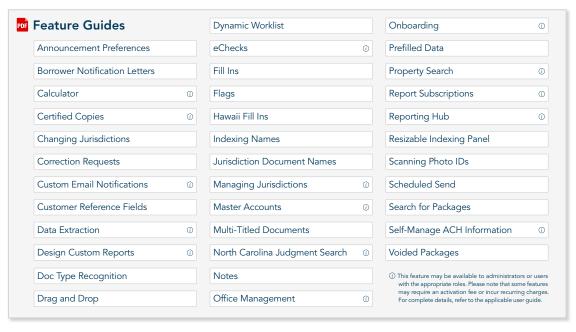
# Congratulations — This concludes our guide! If you have any questions, please contact us:

1 855 200 1150

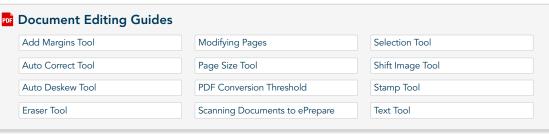
a csc-help@cscglobal.com



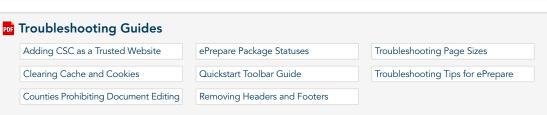














CSC provides electronic recording (eRecording) services for real estate documents, enabling clients to securely and efficiently record documents across the country. As a pioneer in the industry, we're committed to deliver the speed and reliability needed to support seamless real estate transactions. 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.

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