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# eRecording Best Practices for Submitters (1st draft, Date of Issue)

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*There are still known deficiencies in format which PRIA's Style Committee will clean up following final approval.)*

PROPERTY RECORDS INDUSTRY ASSOCIATION

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## Executive Summary - Best Practices for Submitters

Electronic Recording (eRecording) has been steadily progressing throughout the United States since first being implemented in 1998. Recorders, end-user submitters, technology business partners (TBP) and Land Records Management System (LRMS) vendors have tested out multiple approaches and strategies over the years. With the wider adoption of and greater reliance upon eRecording, PRIA is frequently asked for the best practices and norms for eRecording processes. This paper sets forth the consensus that has been reached on six eRecording best practices for submitters. The term “submitters” may include “end-user submitters” and TBP. “End-user submitters” are the people and organizations who execute documents and prepare them for submission to a recording jurisdiction. A (TBP) may include an eRecording company, or any consortium of recording jurisdictions which aggregate and support the electronic recording process (portals).

These Best Practices for submitters should be considered in conjunction with the [Best Practices for Recorders](#). Working together, submitters and recorders can make the recording process more cost effective and efficient, improve the trusted public land registry, and provide other benefits such as fraud prevention and lower underwriting costs.

Six categories of best practices for submitters are presented for consideration. Further elaboration on the specifics is provided in the body of this paper. The key ideas can be summarized as follows.

Best Practice: Work with a private or public eRecording TBP. These organizations have worked in conjunction with PRIA/MISMO standards to connect with recording jurisdictions throughout the United States.

Best Practice: Manage electronic recording processes to prevent the recording of duplicate documents.

Best Practice: Align with the PRIA/MISMO technical standards and best practices, and ALTA best practices.

Best Practice: Ensure electronic documents (images) are legible, clean, properly oriented and in an approved image format. Image quality is a frequent reason for document rejections.

Best Practice: Provide exactly the information required by the recording jurisdiction. Additionally, TBP and submitters should be aware of the PRIA/MISMO data [modeling standard](#).

Best Practice: Keep any submission “package” manageable; too many documents at once can slow down the recording process.

PRIA recognizes there will naturally be differences in business practices among both submitters and recorders. To the extent possible, both submitters and recorders are encouraged to align their business processes with these recommended best practices.

Submitters should be aware of recording requirements published by recording jurisdictions and the applicable governmental organizations and state recorder associations.

Readers are encouraged to review other PRIA papers on this and related topics, links to which can be found in Appendix A of this document.

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1. **Best Practice: Working with eRecording TBPs.** An end-user submitter should work with TBPs for eRecording services and electronic access to recording jurisdictions. A TBP can also help submitters meet the jurisdictional recording requirements.

**Purpose:** To comply with regulatory and jurisdictional requirements while maximizing the benefits of eRecording services and to prevent delays in getting documents recorded.

**Procedures to meet this Best Practice:**

- Check the recorder's website for a list of authorized TBPs.
- Execute any necessary agreements with the TBP and/or Memorandum of Understanding (MOU) with the recording jurisdiction, in advance of submitting the first document.
- Understand the recording jurisdiction's business rules, state policies or terms of use.

If there is sufficient business reason, an end-user submitter may wish to integrate with the TBP, using an API, to provide significant improvements and efficiencies in processing documents for recording.

2. **Best Practice: Duplicate Recordings.** All submitters should have procedures in place to prevent duplicate recording of documents.

**Purpose:** To avoid the duplicate recording of documents.

**Procedures to meet this Best Practice:**

- Assign a unique identifier to each submission.
- Place a mark or other identifier on each document submitted so end-user submitter staff are aware that the document(s) has already been sent for recording. Document management procedures should be in place to monitor for these identifiers.
- Utilize available software or other technologies designed to flag documents which may be a potential duplicate.
- Implement a “lock” function or similar technology to prevent two processors from working on the submission of the same document.

3. **Best Practice: Align with Standards and Other Best Practices.** TBPs should align with the PRIA/MISMO and ALTA technical standards and best practices.

**Purpose:** To create efficiencies in the eRecording process and avoid delays.

**Procedures to meet this Best Practice:**

- Be aware of the services and features provided by various TBPs to determine which best aligns with the end-user submitter's document management processes.
- Observe and learn about recording requirements published by recording jurisdictions, applicable government organizations and state recorder associations.
- Be attentive to the processes for preparing documents prior to submission for recording.
- Have a process to monitor and correct rejected documents that will be re-submitted for recording.
- Explore and use new technologies which can identify errors and reduce document rejections.

Note: Submitters and Recorders are strongly encouraged to review the PRIA paper "[Best Practices: Decreasing Document Rejections](#)" published on November 20, 2019.

4. **Best Practice: Images and Documents.** Images should be submitted in a standardized format taking into consideration preservation needs. Scanned documents should be clean, without artifacts/lines, and must be fully legible and reproducible, accurately representing the original documents.

**Purpose:** To record and preserve high quality document images in the public land record systems and archives.

**Procedures to meet this Best Practice:**

- The PRIA standard page size recommendation is 8.5 inches by 11 inches or 8.5 inches by 14 inches; however, state statutes may vary. Mixed paper sizes within a submission package may be problematic for some LRMS. Surveys and plats may have a larger scale than allowed by recording provided by the eRecording TBP.
- The PRIA image resolution recommendation is 300 dpi, black and white.
- The image format should be single file, multi-page TIFF, PDF or PDF/A, as specified by the recording jurisdiction.
- PRIA recommends a minimum 10-point font; however, state statutes may vary.
- If a recording jurisdiction has a maximum file size for an image or package, that information should be monitored by the end-user submitter and/or TBP.
- End-user submitters should use software to enhance document images and incorporate digital signatures and other electronic indicia. The resulting image(s) will be of higher quality than scanned paper documents.
- End-user submitters should inspect the quality of document images after they are uploaded to an eRecording system and prior to submitting to the recording jurisdiction.
- Documents that are signed electronically should remain in an electronic format.

\*As technology evolves and more documents are signed electronically, these specifications may be subject to change.

5. **Best Practice: Document Data.** Data accompanying an electronic document submitted for recording should be accurate and provide the information required by the recording jurisdiction.

**Purpose:** To improve the accuracy of the data submitted for an efficient recording process for both submitters and recorders.

**Procedures to meet this Best Practice:**

- Check the information published by a recording jurisdiction or TBP to determine the requirements for data which should accompany an electronic document submitted for recording.
- Accurately complete and submit the required data specified by the recording jurisdiction or TBP for electronic recording. Recorders may rely on information in the electronic document image for their indexing processes. The required data may include:
  - Document Type – Recording fees and other business requirements may be determined by the document type specified.
  - Transaction Information – If applicable, other information that may be required for the calculation of recording fees, such as the transaction amount and the number of parcels being transferred.
  - A Party Name – Providing a name of one party to a transaction represented in an electronic document can help ensure that the correct electronic document is attached to the submission.
  - Submitter Contact Information – If supported by the eRecording software, submitter contact information such as name, phone number or email address may help facilitate communication between the submitter and the recorder.

6. **Best Practice: Submission Limitations.** The end-user submitter should be aware of package-size restrictions to conform to the technical requirements provided by the recording jurisdiction or the TBP.

**Purpose:** To minimize rejection of larger packages or batches and ensure timely return of recorded documents.

**Procedures to meet this Best Practice:**

- Monitor requirements, which may be found on the recorder's website, noting package size restrictions to avoid issues with either acceptance or return of documents.
- Adhere to the limitations on the number of documents submitted in a single package or batch, the number of pages in a single document, file size and file compression type.

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## Conclusion

Contributors to this paper, recorders, end-user submitters and TBPs, are well versed in the electronic recording process. The recorders collectively receive and process hundreds of thousands of documents each year. They have seen the common causes of rejections that prevent the timely recording of important documents. The TBPs provide important technology services and act as a bridge between end-user submitters and recording jurisdictions. The goal of electronic recording is to timely and accurately record documents which facilitate transactions, and to protect the interests of everyone engaged in the business of real estate.

The best practices for submitters described here address errors submitters make in the recording process. Some of the recommendations may seem obvious, but in the common experience of recorders and TBPs, these submission errors arise frequently.

Both submitters and recorders are encouraged to align their business processes and work together to achieve these goals. A critical component of any best practice is communication. More communication and deeper understanding among recorders, end-user submitters, and their TBPs will make all systems work better and faster. Implementing these recommended best practices will result in greater efficiency, reduced rejections, fewer duplicate recordings, and higher quality of permanently archived images. More communication and deeper understanding among recorders, end-user submitters, and their TBPs will make all systems work better and faster.

## Appendix A - Resources

PRIA and ALTA have previously issued several publications which can provide valuable information to augment these best practices.

[ALTA Best Practices](#)

[Best Practices: Decreasing Document Rejections](#)

[Electronic Recording Models: Time To Move Forward](#)

[eRecording Best Practices for Recorders](#)

[PRIA eRecording XML Data Standards](#)

[Real Estate Document Formatting](#)

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