Recording Information

The Recording Information screen details what documents have been logged with the local recording office. Some of this information is necessary for certain documents, most notably the policies and commitment.

The list of **Known Types of Documents** shows all the different types of documents that you can choose to record for the file. Not all will apply to each file and the list can be added to if new types are needed. Clicking on a document will provide up to two options. The first option, **Create Manual Recording**, will appear. Clicking this button allows you to manually enter information regarding the selected type of document. If you have a Simplifile account and have entered your information in the E-Closing Connect screen to activate the integration, a second button marked **Create Simplifile Recording** will appear. This allows you to select the information you wish to send to Simplifile, including sending them documents. Once Simplifile has finished processing, the information will automatically pull through into the file.

If clicking on the **Create Manual Recording** button, a new screen will appear. This screen is where you can enter information about the document that has been recorded. Simply match the information you have on hand from the recording and enter it in the corresponding fields.

Certain types of recording documents will pull information to your policies. The Loan Policy will look at the **Mortgage** record. If this document is not selected, the system will instead look for a **Deed of Trust**. The Owner's Policy will look at the **Deed** record first. If this document is not selected, the system will look at the last four letters of the document name. If they are "deed," the policy will pull that entry's information.

FAQ

"The document type I want to record does not appear on the list. How do I add a new one?"

If you need to enter a new item on the list there is a field labeled **Enter A New Document Type Here**. Enter the name of the document as you wish it to appear, then hit Tab on your Keyboard. The button to create the recording will appear. Clicking this button will create the item and allow you to enter information as you would with any other recording document.

"I added a document to the list, but don't plan to use it ever again. How do I delete it?"

To have an item deleted from the list of **Known Types of Documents**, you would need to reach out our Support team so that we can delete the item from the server. However, please bear in mind that deleting the item will remove it and any created recordings from any file that has used it in the past.

"Is there somewhere I can look at the status of multiple Simplifile recordings? I have a couple of files I'm trying to keep an eye on."

Yes, as a matter of fact there is. On the Whiteboard there is a Simplifile logo at the top of your screen. If you click on that it will take you to a screen that shows you your recent Simplifile items and their status.