

ESS

Electronic Services System – Standards Subcommittee Meeting

AGENDA **October 17, 2024** **Zoom** **9:00 A.M. to 12:00 P.M.**

Welcome and Introductions

July 30, 2024, Meeting Summary – Approval

Iowa Recording Fee and Business Process Modernization Project

- Status of Fee Policy Proposal
 - 331.604
 - Multiple Transactions
 - Review of Stakeholder Reaction
 - Review of Advocacy Activities
- Status of Statutory Policy Recommendations
 - 331.605B (ESS governance)
 - 331.606B (formatting, required data, cover sheets, et al)
 - 331.606 (filing & indexing requirements – PINs, references, locations, time)
 - 558.49 (indexing requirements for conveyances)
 - 331.601A (page and transaction definitions)
 - 331.612 (NEW SECTION – recording of surveys) and related updates
- Special Project Updates
 - Property Notification
 - Back the Blue Reform
 - Beacon Integration
 - Historic Surveys
 - Data Normalization & County Upload API Options

Software Development Update (Time Permitting)

- CESAPI Implementation
- Linux OS Migration

Next Regular Meetings
2025 Calendar: To Be Determined

Standards Subcommittee Virtual Meeting Summary July 30, 2024

Participants

Jayne Schultz, Winneshiek County Recorder
Carolyn Siebrecht, Linn County Recorder
Ashten Wittrock, Carroll County Recorder
Cathy Voith, Calhoun County Recorder

Jolynn Goodchild, Plymouth County Recorder
Katie Carlton, Union County Recorder
Naomi Ellis, Marion County Recorder

Other Participants

Nancy Booten, Lee County Recorder
ReNae Arnold, Dallas County Recorder
Erin Canfield, Boone County Recorder
Deb McDonald, Green County Recorder
Lisa Kent, Wapello County Recorder

Sue Meyer, Clayton County Recorder
Teresa Olson, Worth County Recorder
Stacie Herridge, Story County Recorder

Census Lo-Liyong, Iowa Land Records
Phil Dunshee, Iowa Land Records

Lisa Long, Iowa Land Records
Samantha McMahon, Iowa Land Records

Welcome

A meeting of the ESS Standards Subcommittee was held via web conference. The participants included the regular ESS Standards Subcommittee members and other members of the Document Formatting working group.

April Meeting Summary

The Subcommittee reviewed the April 23, 2024, meeting summary. Carolyn Siebrecht made a motion to approve the meeting summary. Jayne Schultz seconded, and the motion was approved.

Iowa Recording Fee and Business Process Modernization Project

The meeting agenda was structured to provide the Subcommittee and working group with an update on all aspects of the modernization initiative.

Project Charter

The participants received a summary of the ongoing discussion on potential changes to recording fees as part of the recording and business process modernization project. Currently, stakeholder groups, including associations such as the Iowa Bankers Association, Iowa State Bar Association, and others, are being engaged to gather input and feedback on proposed ideas and policy changes. Meetings are being held with the various stakeholders to review the proposed changes, and discussions are ongoing with the goal of finalizing positions prior to the legislative session.

Modernization Preliminary Survey Results

Subcommittee and working group members received an overview of a stakeholder modernization survey. Surveys have been distributed to e-submission and search customers to understand their perspectives, and the results are being analyzed. The team has also been following up on customer support issues identified through the open-ended survey responses. The survey report highlighted results with high ratings for proposals considered 'Very Important'. Many responses were received from law firms, abstractors, surveyors and others. The survey also showed broad support for the modernization project including a reasonable fee increase associated with system improvements.

Fee Policy Working Group

The project charter was streamlined to identify specific activities that will be considered as part of the modernization process. Following the ISAC Summer School, further discussions were held with the

executive board and the fee policy working group that resulted in an updated fee proposal. Concern was raised about eliminating additional transaction fees, the subcommittee will explore this issue and consider language to prevent the inclusion of multiple unrelated transactions in one document.

Fee Policy Modification

Following the summer conference, the Fee Policy Working Group and the Iowa County Recorder Association's Executive Board met to address concerns and differing opinions on the fee policy proposal. Modifications were made to the allocation of resources for ESS and Iowa Land Records, and the updated plan has been circulated to the membership for input. A vote on the revised proposal was expected at the ISAC conference in August.

Stakeholder Communication

It was reported that communication with the key stakeholder groups was underway. This included the Iowa Bankers Association, Iowa Land Title Association, Iowa State Bar Association, the Iowa Realtors Association, the Society of Land Surveyors of Iowa, and the Iowa Credit Union League. The ESS and ICRA lobbying teams plan to work with recorders to engage with individual legislators who serve on the Local Government committees and the Ways and Means committees.

Consideration of Statutory Policy Recommendations

A discussion was held on the document formatting standards and related policies required for the modernization project, including proposed amendments to Chapter 331 of the Iowa Code. A May 30, 2024, memo addressed to the ESS Coordinating Committee was presented to the participants for review and discussion. The memo, prepared by the ILR Project Manager, made recommendations for policy changes for document formatting in section 331.606B, indexing requirements in sections 331.606 and 558.49, and the modification of certain definitions in section 331.601A. The memo was accompanied by specific suggested legislative language. The content generally reflected many meetings and conversations of the Subcommittee and working group members that started in February 2023. It was noted that changes and refinements should be expected as the draft content is vetted with the various stakeholder groups.

The following is a summary of the more substantive recommendations.

- Modifies the minimum type size to 10 point and removes exceptions for pre-printed text.
- Modifies the required space for the top margin of the first page to require sufficient space for the recording stamp.
- Requires that parsed location information be provided on the first page.
- Clarifies language requiring parcel identification numbers on the first page.
- Clarifies language to require associated references when applicable.
- Codifies the use of cover pages when submitting documents for recording.
- Creates a new section of the Code with recording requirements for surveys and similar documents.
- Clarifies the authority of recorders to decline the recording of documents when an issue prevents the recorder from fulfilling their duty to record.
- Requires indexing with parsed location information, associated references and parcel identification numbers.

Pending Legislative Drafting

The Subcommittee and working group members were advised of plans for drafting the necessary statutes concerning recording fees and ESS (the county land record information system) authorization. It is expected that section 331.604 will need to be rewritten in its entirety, and that section 331.605B will also require several updates. The fee policy legislation would include increasing the current base recording fee from \$5 to \$10. The records management fee would be restructured to allocate funds from the revised base recording fee. Funds would also be allocated from the base recording fee to support ESS and Iowa Land Records.

The goal of the ESS authorization legislation would be to create coherent section that clearly outlines the mission and purpose of the ESS. This new section would replace the fragmented references currently scattered in different sections of the Iowa Code. No substantive policy changes are intended with these revisions.

Auditor Transfer Fees

No formal recommendations were made with respect to the Auditor's Transfer Fee.

Achievable Modernization Project Initiatives

Participants received an update on several project initiatives that are included in the modernization initiative.

Property Notification

The Project Manager presented plans for a property notification system, which will allow individuals and organizations to monitor specific property records and receive alerts based on predefined criteria such as names or document reference numbers. Built on the existing Iowa Land Records (ILR) search application, this system will introduce a "notification user" class, enabling users to sign up for notifications without using the full search platform.

Key features include:

- Users can receive notifications via email when documents matching their criteria are recorded. An authenticator service or SMS could be added if resources permit.
- Financial institutions and organizations could monitor business-related records, such as mortgage satisfactions.
- The wildcard search option could help capture variations or misspellings in names.

The system's business rules, including potential restrictions on monitoring certain names, are still being developed, and stakeholder feedback will help shape the final design. If legislative support is secured early enough, the project could start in early 2025; otherwise, it may begin later that year.

Back the Blue Reform

The current Back the Blue program could be improved and transformed into a "shielding" system. This would limit public access to entire documents rather than just redacted names. Access to these shielded documents would be restricted to specific users based on their professional roles, such as title agents or certain legal professionals. These users would need to be registered with the Iowa Land Records system and have the necessary permissions. This approach is being discussed with key stakeholders including the Iowa State Bar Association, the Iowa Land Title Association and Iowa Title Guarantee.

Historic Surveys

The Iowa Society of Land Surveyors has expressed interest in digitizing and preserving important but unrecorded documents, such as historic surveys. These documents, often sitting in private collections, are unrecorded, but hold professional and historic value. Iowa Land Records is currently in discussions with the surveyors to assist with making these records available online.

Property Information Integration

ESS and Iowa Land Records are currently engaged in planning with Schneider Corporation (Beacon) to establish an updated system integration. The updated system would be intended to enhance user access to information by registered users.

Software Development Update

The Subcommittee received a report on the status of redaction services. The team is working with CSI, the current redaction provider, to re-establish services on a new and secure platform. Testing is underway to ensure that the platform meets security standards. Once the platform is confirmed to be secure, the regular redaction process will resume. In the meantime, ESS will continue with the internal redaction process.

1. Section 331.604 is amended by striking the section in its entirety and inserting in lieu thereof the following.

331.604 Recording and filing fees.

1. Except as otherwise provided by state law, subsection 5, or section 331.605, the recorder shall collect a fee of ten dollars for each page or fraction of a page of a document or instrument which is recorded in the recorder's office.
2. From the total fee paid for the recording of a document or instrument, two dollars shall be allocated to a recorder's technology advancement fund as described herein. The recorder's technology advancement fund may be used for the following purposes.
 - a. Maintaining and improving equipment, software and systems associated with recording and other duties administered by the office of the county recorder.
 - b. Preserving and maintaining physical and electronic documents and instruments archived by the county recorder.
 - c. Converting physical documents to electronic documents and providing that those documents are indexed as required in sections 331.606 and 558.49. When converting physical documents to electronic documents, if it is not feasible to conform to standards for digitizing and indexing the documents separately, then funds may be used to digitize the records.
 - d. Participating in education and training for the purpose of advancing technology and improving the services provided by the office of the county recorder.

The county treasurer, on behalf of the recorder, shall establish and maintain a recorder's technology advancement fund into which all money allocated pursuant to this subsection shall be deposited. Interest earned on money deposited in the fund shall be credited to the recorder's technology advancement fund. The recorder may collaborate with other entities, boards, and agencies to advance the use of technology for the delivery services consistent with standards established for those services.

3. From the total fee paid for the recording of a document or instrument, three dollars shall be allocated to the electronic services system as described herein. The amount allocated may be used for the purposes described in Section 331.605B.

The county treasurer, on behalf of the recorder, shall establish and maintain a recorder's electronic services system fund into which all moneys allocated pursuant to this subsection shall be deposited. Interest earned on money deposited in this fund shall be computed based on the average monthly balance in the fund and shall be credited to the recorder's electronic services system fund.

4. On a monthly basis, the county treasurer shall transfer the funds deposited into the county recorder's electronic services system fund to a financial account designated by the electronic services system, a government entity established under chapter 28E. Moneys expended by the electronic services system shall be for the purposes specified in Section 331.605B, and to pay the ongoing costs of operating the electronic services system.
 5. The county recorder or the county land record information system shall make available any information required by the county auditor or auditor of state, as applicable, concerning the allocations made under subsections 2 and 3 for the purposes of determining the amount of the allocations and the uses for which such allocations are expended.
 6. A county shall not be required to pay a fee to the recorder for filing or recording instruments. However, a county treasurer is required to pay recording fees pursuant to sections 437A.11 and 437B.7.
2. Session Law Action. Any funds in a county recorder's records management fund as of June 30, 2025 shall be transferred to the recorder's technology advancement fund. Alternatively, this change may be implemented by changing the name of the county recorder's records management fund to be the recorder's technology advancement fund.
 3. Session Law Action. Any funds in a county recorder's electronic transaction fund as of June 30, 2025, shall be transferred to the county recorder's electronic services system fund. Alternatively, this change may be implemented by changing the name of the county recorder's electronic transaction fund to be the county recorder's electronic services system fund.
 4. Session Law Action. Any funds in the local government electronic transaction fund as of June 30, 2025 shall be retained in the fund for the purposes specified in Section 331.605B until the remaining funds are exhausted.

Note: Section 331.605B is intended to be a reference to what would be a newly created section in Chapter 331 restating and restructuring the electronic services system. This would include moving the current 331.604 (3f) (28E).

Note: With the suggested repeal of 331.604 (3g), the intent is to create an entirely new "back the blue" section with a different statutory reference number.

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.606B (2?)	NEW	NEW numbered subsection.	A document or instrument which executes a transaction for the conveyance or assignment of property , the provision of financing, or the release of a legal or financial obligation, shall be applicable only to the parties participating in the same transaction, and shall not be applicable to multiple parties participating in different transactions.	It is possible that current statutes which provide for a recording fee for "additional transactions" may be repealed. This would mean that a document making assignments concerning multiple parcels would no longer be charged more than a base recording fee (even in cases where such documents might require significantly more time to process and index). Multiple transaction filings could result in unintended consequences and dramatically increase the risk of being missed by abstractors, abstract attorneys, lenders and property owners; creating unnecessary risks for error and potential liability in real estate transactions. It is a best practice to address different transactions in separate documents or instruments. Multiple transactions involving different parties should not be incorporated in the same document or instrument.	

Joint Recorders and ILTA Meeting

Summary Web Conference

April 4, 2024 – 2:00 PM

Representatives of the Iowa County Recorders Association, the Electronic Services System (Iowa Land Records) and the Iowa Land Title Association met via web conference.

Participants included: Jan Gemar, Executive Director, ILTA; Sally Hertel, Mitchell County Abstract Company; Dallas Brown, Cornell Abstract Co.; Nancy Booten, President, ICRA and Lee County Recorder; Stacie Herridge, Story County Recorder; and Megan Clyman, Davis County Recorder

Other participants included: Dillon Malone, Iowa Title Guaranty Director; Mike St. Clair, ILTA; Nick Lanning, ESS; Bob Rafferty, ESS; Phil Dunshee, ESS; and Census Lo-Liyong, ICRA & ESS

In advance of the meeting documents were provided to ILTA for review including an “Abstract of Recording Modernization Initiatives” dated 031124, and a recently adopted policy change relating to Associated References. ILTA had also been referred to the February 2024 ESS packet to reference other policy materials.

On April 2, Jan and ILTA had kindly marked up and returned copies of the “Abstract” and “Associated Reference” policy to help facilitate conversation at the planned meeting, and on the morning of April 4 Phil returned information about the questions and comments received from ILTA. From the discussion it appeared that the exchange of questions, comments and answers was helpful to everyone. These documents are attached for reference.

The meeting focused on the topics which required additional clarification. A summary of the main topics and comments follows.

Associated References. ILTA sought further clarification about the definition and use of associated references. Associated references are existing data elements in recorder indexes which are used to tie associated documents together: mortgages with satisfactions; liens with releases; deeds with related documents such as groundwater hazard statements or the previous deed for the same property; or recorded documents which are corrected or re-recorded. The intent of this initiative would be to expand the usage and consistency of associated references to help users access documents that are related to each other.

ILTA pointed out that parties in such documents can change overtime and possibly there could be reassignments from one party to another, and therefore, while helpful, might not give abstractors everything they need for their research. This insight into the needs of abstractors was helpful to recorders and may be explored further.

Parcel Identification Numbers. ILTA sought further clarification about how Parcel Identification Numbers would be indexed, noting that PINs can change when parcels are subdivided or consolidated. The purpose of the indexing PINs was clarified. Indexing PINs would expand the possibility of tying property information systems together to create greater ease of access to property information, and to simply make it possible to search for documents using a PIN.

It was noted that in many cases the PINs would not change with a conveyance, but if it did, it would be possible to index those changes. The intent is to index records with the correct information in the general time frame of the transaction, but not to update all records whenever a conveyance document is recorded.

Indexing Notary Information. ILTA sought further clarification about the Modernization to index notary information. It was explained that some property fraud activity may be associated with fraudulent notarization. By indexing notary information, it could be possible to document and track notary activities and to monitor other transactions when fraud is discovered. Generally, ILTA expressed the thought that notary information best be left to the Secretary of State. ILTA representatives wondered whether the work and investment required of recorders would be justified and suggested that a property notification system (also described in the Abstract) might be a better use of resources. Dillon Malone from ITG echoed this sentiment. Appreciation was expressed to ILTA for sharing this perspective.

Digitizing Historic Surveys. Participants discussed the Abstract topic relating to digitizing and creating a database of older surveys and plates. This is a project being discussed with the Society of Land Surveyors of Iowa. One of the key insights gained from the discussion with ILTA was that effort may have value to surveyors but might not be of much use to abstractors if those older records are not actually recorded.

References to Adjacent Property. In the context of building associated references between documents, ILTA suggested that it might be helpful to them if somehow location and recording information about neighboring properties could be indexed with a survey document. Specifically, when a survey document references, in the real estate description, another document or name of adjacent property owners, the surveyor could include the recording information for that document. Instead of the description stating i.e. "to the Northeast corner of property owned by Joe Smith" it could recite "to the Northeast Corner of property owned by Joe Smith in document no. 2024-1111." This insight into the needs of abstractors was helpful to recorders and may be explored further. It is unclear whether adjacent property information is a data element in the recorder's index or in Iowa Land Records. This is a topic that can be shared and discussed with the ICRA/SLSI working group.

The group discussed ICRA plans for seeking a recording fee increase, which hasn't changed since 1985. Jan, Sally and Dallas indicated that would be an issue considered by their Board. Generally, ILTA had questions about the overall cost of the various "Modernization" initiatives.

All participants expressed appreciation for the communication and for the improved relations in recent years. All hoped for this to continue.

Further updates will be provided as planning proceeds.

Time of Recording – Filed v. Recorded

There was a consensus that the term should be updated to use “recorded”.

Affected Code sections are:

558.49 (3)

The date and time when the instrument is ~~filed with~~ recorded by the recorder.

331.606 (1)

1. In addition to other requirements specified by law, the recorder shall note in the county system the date of ~~filing~~ recording of each instrument, the number and character of the instrument, and the name of each grantor and grantee named in the instrument. In numbering the instruments, the recorder may start with the number one immediately following the date of annual settlement with the board and continue to number them consecutively until the next annual settlement with the board or the recorder may start with number one on the first working day of the calendar year and continue to number the instruments consecutively until the last working day of the calendar year.

Note: This is to highlight only the change in the term from “filing” to “recording”. In a full amendment this section would be rewritten to establish a new standard format for reference numbers.

331.606 (2)

The recorder shall also note in the index the exact time of the ~~filing~~ recording of each instrument.

Accuracy of Recording Time

The question was asked about whether the standard for recording time accuracy should be to the second or millisecond. Participants wished to consider the option and review again at a future discussion.

331.606 (2)

The recorder shall also note in the index the exact time of the ~~filing~~ recording of each instrument which shall be accurate to the ~~second.~~ (millisecond?)

Date of Instrument

There was a consensus that the suggested date of instrument language be accepted.

558.49 (4)

The date on which the document or instrument was executed by the parties, to the extent practicable. If there is a variance in the date of execution by the parties, the most recent date shall be indexed.

Multiple Transaction Requirements (NEW)

The question was asked about whether some guidelines or guardrails should be established for documents which might reference multiple transactions concerning unrelated parties. Keeping in mind that recorders index references to related documents, such references pointing to multiple different transactions could be confusing and time consuming for a researcher. A best practice might be as follows.

- A release of a mortgage or mortgages (satisfaction) should relate only to a mortgage or mortgages with the same borrower(s).
- A release of a state or federal tax lien or liens should relate only to a lien or liens against the same party.
- A satisfaction of lien should relate only to a lien or liens against the same party.

- An assignment of a mortgage or mortgages should relate only to an assignment of a mortgage or mortgages with the same borrower(s)

Generally, the group was asked to consider whether multiple transactions involving different parties should be controlled and not be incorporated in the same document or instrument. The initial draft suggested language was as follows.

331.606B(?)

A document or instrument which executes a transaction for the conveyance or assignment of property, the provision of financing, or the release of a legal or financial obligation, shall be applicable only to the parties participating in the same transaction and shall not be applicable to multiple parties participating in different transactions.

Participants wished to consider the topic and review again at a future discussion.

Cover Sheet Content

The question was asked about whether a policy should be established to prevent the inclusion of language with "legal effect" in a cover sheet.

The group had previously considered the addition of language to 331.606B (3d) (NEW)

d. An attestation statement, or any information intended to have legal effect shall not be included on the cover sheet.

Two concepts were advanced for discussion.

1. Insert language into the groundwater hazard statute

Possible amendment.

Amend Section 558.69, subsection 8a as follows.

8. a. If there are no conditions present, as described in subsection 1, then a groundwater hazard statement shall not be submitted. In lieu of the submission of a groundwater hazard statement, any deed, instrument, or writing by which any real property in this state shall be granted, assigned, transferred, or otherwise conveyed shall include on the first page of the deed, instrument, or writing the following statement:

There is no known private burial site, well, solid waste disposal site, underground storage tank, hazardous waste, or private sewage disposal system on the property as described in Iowa Code section 558.69, and therefore the transaction is exempt from the requirement to submit a groundwater hazard statement.

The statement shall not be provided on a cover sheet or page attached to a document or instrument.

2. Add language to cover sheet section indicating that it should only be used for recorder's indexing information.

Possible amendment.

Amend Section 331.606B, subsection 3b, as follows.

3. The information specified in 331.606B, Section 2 may be provided in one of the following forms.

- a. As a part of the first page of a document or instrument and presenting the data elements separately from the main body and in an identifiable form such as table or grid.
- b. As a cover sheet or page accompanying a document or instrument in a format approved by the county land record information system. A cover sheet is not a part of the body of a document or instrument, but it shall be recorded contemporaneously as an additional first page to the document or instrument and shall conform to Section 331.606B, Section 1.
- c. If insufficient space exists on the first page or a cover sheet for all of the information described in subsection 2, the page reference of the document or instrument where the information is located shall be noted on the first page or coversheet.

Note: This revision coincides with previously reviewed language which clarifies that “in the event that information presented under this subsection [the “grid or table” described in the updated 331.606B(2)] is in conflict with the body of a document or instrument, the information contained in the body of the document or instrument shall control”

Participants wished to consider these options and review again at a future discussion.

There was consensus that the option for a cover sheet should be retained for those circumstances when the first page could not accommodate the required information.

Recording Reference Numbers

331.606 (1)

The idea of creating a uniform, standard format for recording reference numbers was introduced for discussion. Interest in having a standard format was expressed, but the participants wished to consider these options and review again at a future discussion.

Recording Fees

Revised 331.604

A draft amendment to Section 331.604, providing for the reform of recording fees, was described to the group. Participants reviewed the suggested changes, and acknowledged that it would need to be reviewed further at a future discussion.

September 23, 2024

To: Board of Supervisors – Iowa Counties

From: Nancy Booten, Lee County Recorder and
Iowa County Records Association President

Lisa Kent, Wapello County Recorder
Chair, Electronic Services System



IOWA LAND RECORDS

Re: Recording Fee Revenue and Modernization Project

Recent history has shown that in just a few years inflation can erode the purchasing power of static income. A portion of the funding which supports the recording function in Iowa counties is the recording fee, but for most counties a significant portion of recording operations are funded by county supervisors through the county general fund. Over time, the proportion of funding from the county general fund has likely grown, because it has been nearly 40 years since recording fees have been updated.

The Iowa County Records Association (ICRA) and the Electronic Services System (ESS), in collaboration with the Iowa State Association of Counties (ISAC), will be advancing a legislative proposal to update recording fees. The base recording fee would increase from \$5.00 per page to \$10.00 per page. This would be accompanied by changes to simplify the overall recording fee by eliminating several add-on fees. For example, the so-called “additional transaction fee” would be repealed. Two of the current add-on fees would be converted to be “allocations” from the base fee. No action is suggested with respect to the auditor’s transfer fee although it is possible that stakeholders and policy makers may wish to review it. See the attached handout for further information.

Bottom Line for County Budgets

Funding for the county general fund will be increased. The net effect will depend on the overall level of recording activity and the number of pages in each document. Statewide, the average number of pages per document is 4.5. A conservative assumption might be to use an average of 4 pages per document. Based on these assumptions, and when compared to reported recording fee income in calendar year 2023, income to the county general fund could be expected to increase in a range from 56% to 79%. This is relevant, because additional property tax reforms will likely be explored; putting pressure on local government budgets while the cost of providing essential services continues to rise. The attached Fee Proposal Summary estimates the amount of net income increase for each county.

The fee policy change will be accompanied by several reforms to the recording process that will benefit both customers and recorders. Additionally, the fee policy change would provide resources to sustain and improve the Iowa Land Records system and create new services for our constituents such as a property notification system. Other initiatives include the following:

- Updating document formatting requirements
- Re-establishing an integration agreement with the Beacon system
- Reforming the "Back the Blue" program for greater effectiveness

In August, the ICRA convened for their annual meeting and voted 70:1 in support of the recording fee and modernization policy. We respectfully request the support of the Iowa State Association of County Supervisors and each county Board of Supervisors for this initiative. If you have any questions, we would be happy to answer them or arrange a briefing at your convenience.

Attachments: Fee Policy Handout
Fee Proposal Summary (table of projected net income increase)

For more information please contact:

Stacie Herridge, ICRA Legislative Liaison - sherridge@storycountyiowa.gov
Megan Clyman, ICRA Legislative Liaison - recorder@daviscountyiowa.org
Census Lo-Liyong, ESS Policy Coordinator - clo-liyong@clris.com

MODERNIZATION PROPOSAL

Recording fees help cover the costs of recording real estate transactions and the necessary technology and security. Iowa's recording fees haven't been updated since 1985, and inflation has increased local recording and ILR service costs. ILR was one of the first statewide land record systems in the country and continues to offer free access to over 23 million records, with the Iowa County Recorders Association (ICRA) playing a central role in its operation and success.

Policies would be modernized to reflect current and future industry practices. Proposed reforms, supported by ICRA, aim to ensure that modernization in recording services benefits the real estate industry, as described in the Benefits of Modernization section.

SIMPLIFY FEES TO \$10/ PAGE

The proposal suggests increasing the recording fee to **\$10.00 per page** (up from the current \$5.00 per page plus fees), which is well **below the \$14.75 inflation-adjusted rate for 2024**. Additionally, several “add-on” recording fees would be eliminated.

CONTACT

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BENEFITS OF MODERNIZATION



TECHNOLOGY & TRAINING IN COUNTY OFFICES



BETTER STANDARDS FOR DOCUMENT PREPARATION

- Standard 10 point font
- Updated formatting & indexing standards
- More data consistency



IMPLEMENTING KEY PROJECTS FOR NEW & BETTER SERVICES

- Establishing a statewide property notification system
- Indexing more data (Parcel Identification Numbers & associated references)
- Accessing more property information in other online systems
- Filling gaps in property location information
- Improving search tools
- Increasing online access to historic surveys and plats
- Improving Back the Blue information shielding

FIRST FEE INCREASE IN 40 YEARS

IOWA COUNTY RECORDERS ASSOCIATION
IOWA LAND RECORDS

SIMPLIFY RECORDING FEES

Recording fees would be simplified to rounded numbers for recording services while reducing the overall net fee increase. Calculating recording fees would be more predictable and understandable.

REMOVE \$1 Records Management Fee. REMOVE \$1 Electronic Transaction Fee.

- **REPEAL:** Additional Transaction Fee (\$7.00 per transaction) for multi-transaction documents with reasonable limits
- **REPEAL:** Non-Standard Recording Fee (\$10.00)

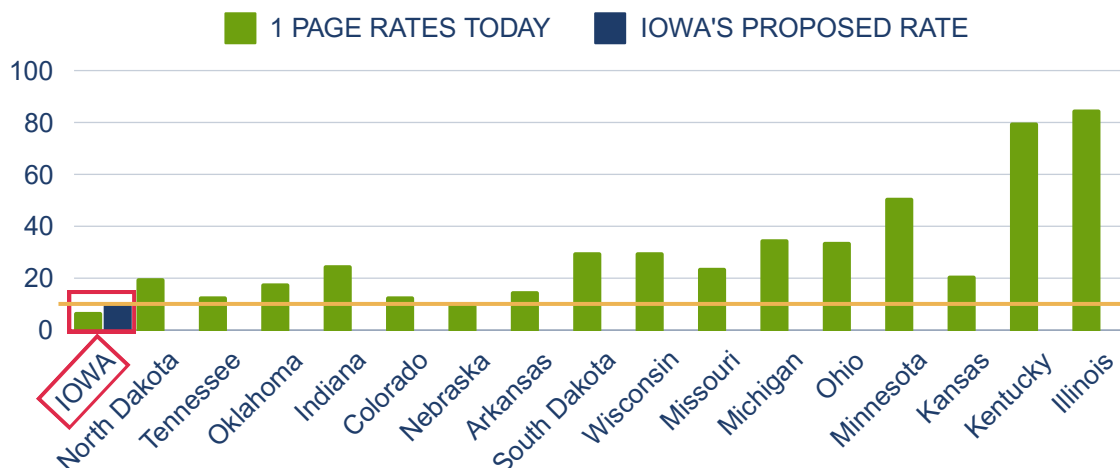
PER DOCUMENT FUNDING ALLOCATION

- **\$2** allocated to “Recording Technology Fund” for Recorder’s Office tech needs
- **\$3** allocated to ILR operations and projects
- Remaining recording fee income goes to the County General Fund

	CURRENT	PROPOSED	INFLATION
1 PAGE	\$7	\$10	\$20.44
4 PAGES	\$22	\$40	\$64.24

NOTE: The example of 4 pages was selected for representation because it is roughly the average number of pages recorded per document in Iowa counties. The service fee of \$3.00 per document for E-Submission (e-filing) would remain unchanged and would not be increased. The proposal does not address fee policy relating to real estate transfer taxes or the auditor’s transfer fee.

IOWA RECORDING FEES COMPARED TO OTHER STATES



SURVEY ASKED USERS ABOUT MODERNIZATION & FEE INCREASE

“Would you be willing to support a reasonable increase in the recording fee, if it is less than the inflation amount since 1985?”

**79%
YES**

Recording Fee Adjustment From \$5 Per Page To \$10 Per Page

Co #	County Name	Estimated County General Fund Increase	Estimated County General Fund Increase
		4 Page Average	4.5 Page Average
1	ADAIR	\$22,767	\$29,957
2	ADAMS	\$12,205	\$16,975
3	ALLAMAKEE	\$41,209	\$54,259
4	APPANOOSE	\$40,040	\$53,470
5	AUDUBON	\$21,180	\$27,300
6	BENTON	\$54,692	\$76,982
7	BLACK HAWK	\$196,202	\$279,292
8	BOONE	\$55,238	\$76,148
9	BREMER	\$51,302	\$69,552
10	BUCHANAN	\$51,460	\$69,510
11	BUENA VISTA	\$39,926	\$54,446
12	BUTLER	\$9,955	\$22,575
13	CALHOUN	\$34,211	\$44,951
14	CARROLL	\$43,637	\$58,117
15	CASS	\$33,631	\$43,941
16	CEDAR	\$47,151	\$63,441
17	CERRO GORDO	\$85,640	\$119,300
18	CHEROKEE	\$28,866	\$40,226
19	CHICKASAW	\$28,469	\$39,689
20	CLARKE	\$23,501	\$31,921
21	CLAY	\$34,396	\$48,976
22	CLAYTON	\$57,828	\$74,478
23	CLINTON	\$62,015	\$95,495
24	CRAWFORD	\$35,765	\$47,275
25	DALLAS	\$186,638	\$279,418
26	DAVIS	\$24,800	\$32,520
27	DECATUR	\$23,361	\$31,201
28	DELAWARE	\$47,181	\$63,411
29	DES MOINES	\$70,379	\$97,119
30	DICKINSON	\$65,747	\$95,207
31	DUBUQUE	\$156,044	\$216,574
32	EMMET	\$22,469	\$30,319
33	FAYETTE	\$48,123	\$64,483
34	FLOYD	\$34,162	\$46,782
35	FRANKLIN	\$31,781	\$41,611
36	FREMONT	\$17,496	\$24,536
37	GREENE	\$32,718	\$43,088
38	GRUNDY	\$34,304	\$46,064
39	GUTHRIE	\$43,743	\$57,323
40	HAMILTON	\$36,324	\$49,374
41	HANCOCK	\$30,970	\$42,080
42	HARDIN	\$43,253	\$58,783
43	HARRISON	\$40,325	\$54,155
44	HENRY	\$39,129	\$52,859
45	HOWARD	\$30,145	\$39,935

Recording Fee Adjustment From \$5 Per Page To \$10 Per Page

Co #	County Name	Estimated County	Estimated County
		General Fund Increase 4 Page Average	General Fund Increase 4.5 Page Average
46	HUMBOLDT	\$21,325	\$30,935
47	IDA	\$19,014	\$25,474
48	IOWA	\$41,847	\$55,357
49	JACKSON	\$43,967	\$59,687
50	JASPER	\$82,470	\$113,330
51	JEFFERSON	\$41,899	\$55,599
52	JOHNSON	\$208,476	\$299,916
53	JONES	\$48,106	\$63,466
54	KEOKUK	\$30,376	\$40,086
55	KOSSUTH	\$19,326	\$34,356
56	LEE	\$56,678	\$77,568
57	LINN	\$398,139	\$555,039
58	LOUISA	\$21,160	\$29,290
59	LUCAS	\$24,154	\$32,234
60	LYON	\$41,195	\$54,265
61	MADISON	\$39,877	\$55,637
62	MAHASKA	\$43,319	\$58,759
63	MARION	\$73,985	\$100,745
64	MARSHALL	\$73,282	\$98,512
65	MILLS	\$22,703	\$36,213
66	MITCHELL	\$27,602	\$37,182
67	MONONA	\$23,914	\$31,674
68	MONROE	\$20,625	\$27,575
69	MONTGOMERY	\$17,128	\$26,018
70	MUSCATINE	\$58,950	\$86,840
71	O'BRIEN	\$35,411	\$49,521
72	OSCEOLA	\$21,754	\$29,154
73	PAGE	\$34,255	\$45,925
74	PALO ALTO	\$16,160	\$26,270
75	PLYMOUTH	\$55,088	\$76,528
76	POCAHONTAS	\$29,523	\$38,363
77	POLK	\$778,971	\$1,115,981
78	POTTAWATTAMIE	\$133,919	\$193,299
79	POWESHIEK	\$45,492	\$60,792
80	RINGGOLD	\$22,248	\$29,288
81	SAC	\$33,667	\$43,437
82	SCOTT	\$249,709	\$362,659
83	SHELBY	\$31,756	\$42,026
84	SIOUX	\$71,003	\$100,453
85	STORY	\$120,333	\$166,073
86	TAMA	\$42,768	\$56,898
87	TAYLOR	\$19,941	\$26,961
88	UNION	\$33,508	\$44,218
89	VAN BUREN	\$25,379	\$32,639
90	WAPELLO	\$59,657	\$82,257

Recording Fee Adjustment From \$5 Per Page To \$10 Per Page

Co #	County Name	Estimated County General Fund Increase	Estimated County General Fund Increase
		4 Page Average	4.5 Page Average
91	WARREN	\$96,298	\$143,308
92	WASHINGTON	\$58,872	\$78,512
93	WAYNE	\$4,114	\$11,884
94	WEBSTER	\$68,583	\$93,383
95	WINNEBAGO	\$21,809	\$30,029
96	WINNESHIEK	\$37,155	\$52,415
97	WOODBURY	\$136,538	\$197,168
98	WORTH	\$14,217	\$20,627
99	WRIGHT	\$36,727	\$49,457
Total Increase		\$6,004,750	\$8,390,400
% Increase (2023)		56%	79%

With the proposed revisions to 331.604 concerning base recording fees it became apparent that over the years the statutes relating to various policy issues had become disorganized. For example, policies relating to the county land record information system (Electronic Services System) can be found in different sections of Chapter 331. It is suggested that most of the statutes relating to the Electronic Services system be consolidated into one section – 331.605B. The following are suggested amendments to effect this change. The intent is to simply reconfigure and implement current policies – a “Code Cleanup”. No actual policy changes are recommended.

1. Amend section 331.601A, Definitions, by inserting the following numbered paragraph.

10. Electronic Services System. The Electronic Services System is the organization formed under a chapter 28E agreement to create and implement a county land record information system. The agreement is required by 2005 Iowa Acts, ch. 179, §101, as amended by 2021 Iowa Acts, ch. 126.

2. Amend section 331.603, subsection 5a, is amended to read as follows.

331.603 (5a)

5. a. ~~The governing board of the county land record information system shall not enter into an agreement to provide access to electronic documents or records on a batch basis.~~ The county recorder may collect reasonable fees for access to electronic documents and records pursuant to an agreement. The fees shall not exceed the actual cost of providing access to the electronic documents and records. “Actual cost” means only those expenses directly attributable to providing access to electronic documents and records. “Actual cost” shall not include costs such as employment benefits, depreciation, maintenance, electricity, or insurance associated with the administration of the office of the county recorder ~~or the county land record information system.~~

3. Amend section 331.605B by striking the section in its entirety and inserting in lieu thereof the following.

331.605B Electronic Services System

1. The Electronic Services System agreement may be amended by a vote of the boards of supervisors on behalf of the respective county recorders, pursuant to the terms of the agreement, to provide for the ongoing implementation of the Electronic Services System. Each county shall participate in the Electronic Services System and shall comply with the policies and procedures established by the governing board of the Electronic Services System.

2. The governing board of the Electronic Services System shall collect only statutorily authorized fees for land records management, and shall not collect a fee for viewing, accessing, or printing documents in the county land record information system unless specifically authorized by statute. The governing board may collect a fee of not more than three dollars per recorded document for using the system to process electronic documents for recording. An additional service charge may be added for credit or debit card payments. Fees collected for the processing of electronic documents for recording may be used for the purposes specified in subsection 3.

3. The Electronic Services System shall develop, operate and maintain a statewide county land record information system and internet site for the following purposes.

- a. Provide online access to recorded public documents and instruments
- b. Enable electronic filing for recording documents and instruments
- c. Receive authorized payments for services provided
- d. Implement security and redaction systems to protect users and Iowa citizens
- e. Shield information for the protection of qualified persons who may be endangered
- f. Integrate with other appropriate relational property information systems
- g. Establish business and technology standards for processing, recording, indexing and archiving documents and instruments
- h. Operate a system capable of notifying users of transactional activity associated with their property or engagement with other public services
- i. Other purposes authorized by statute

4. The governing board of the county land record information system shall not enter into an agreement to provide access to electronic documents or records on a batch basis.

DRAFT

STATEWIDE SYSTEM REQUIRED

331.604 (3. a.) Each county shall participate in the county land record information system and shall comply with the policies and procedures established by the governing board of the county land record information system.

AUTHORIZED ACTIVITIES

331.604 (3.b.1 a-d)

- (a) Establishing and implementing standards for recording, processing, and archiving electronic documents and records.
- (b) Maintaining the statewide internet site and the county land record information system.
- (c) Integrating information contained in documents and records maintained by the recorder and other land record information from other sources with the county land record information system.
- (d) Implementing and maintaining a process for redacting personally identifiable information contained in electronic documents that are displayed for public access through an internet site or that are transferred to another person.

331.604 (3.d) ... relevant excerpt

for the purpose of planning and implementing electronic recording and electronic transactions in each county, developing county and statewide internet sites to provide electronic access to records and information, and to pay the ongoing costs of integrating and maintaining the statewide internet site.

331.605B (2) ... relevant excerpt

Fees collected for the processing of electronic documents for recording may be used for the purposes specified in section 331.604 and for the purposes of *development, operation, and maintenance of the county land record information system and internet sites, systems for electronic filing for recording, associated payment systems, security systems, the land records databases, methods for searching the databases, processes for the redaction of personally identifiable information posted for public online access, and processes for the integration of land records information with other property information systems.*

AUTHORIZATION TO AMEND 28E AGREEMENT

331.604 (3.f)

f. The county land record information system agreement may be amended by a vote of the boards of supervisors on behalf of the respective county recorders, pursuant to the terms of the agreement, to provide for the ongoing implementation of the county land record information system. As used in this paragraph, "*county land record information system agreement*" means the agreement entered under chapter 28E between the counties as required by 2005 Iowa Acts, ch. 179, §101, as amended by 2021 Iowa Acts, ch. 126.

PROHIBITION OF ESS BATCH BASIS ACCESS

331.603 (5a)

5. a. ~~The governing board of the county land record information system shall not enter into an agreement to provide access to electronic documents or records on a batch basis.~~ The county recorder may collect reasonable fees for access to electronic documents and records pursuant to an agreement. The fees shall not exceed the actual cost of providing access to the electronic documents and records. "Actual cost" means only those expenses directly attributable to providing access to electronic documents and records. "Actual cost" shall not include costs such as employment benefits, depreciation, maintenance, electricity, or insurance associated with the administration of the office of the county recorder ~~or the county land record information system.~~

PROHIBITION OF FEES FOR SEARCHING LAND RECORDS & AUTHORIZATION FOR E-SUBMISSION SERVICE FEE

331.605B (2)

2. A recorder or the governing board of the county land record information system shall collect only statutorily authorized fees for land records management. The governing board of the county land record information system shall not collect a fee for viewing, accessing, or printing documents in the county land record information system unless specifically authorized by statute. The governing board of the county land record information system may collect a fee of not more than three dollars per recorded document for using the system to process electronic documents for recording. An additional service charge may be added for credit or debit card payments. Fees collected for the processing of electronic documents for recording may be used for the purposes specified in section 331.604 and for the purposes of development, operation, and maintenance of the county land record information system and internet sites, systems for electronic filing for recording, associated payment systems, security systems, the land records databases, methods for searching the databases, processes for the redaction of personally identifiable information posted for public online access, and processes for the integration of land records information with other property information systems.

Note: The provisions of the current 331.605B (1) are addressed in the proposed amendment to 331.604 (5).

331.605B Fees collected — audit.

1. The recorder shall make available any information required by the county or state auditor concerning the fees collected under section 331.604, subsection 2, for the purposes of determining the amount of fees collected and the uses for which such fees are expended.

Note: The provisions of 331.604 (3.b.2) are no longer relevant, because the \$1.00 fee has been universally applied to all documents since 2011. Further, this additional fee is being repealed altogether.

(2) The fee collected by the recorder under this subsection for recording a plat of survey is one dollar, regardless of the number of pages. For purposes of this subparagraph, “*plat of survey*” means the same as defined in section 355.1, subsection 9.

Note: The provisions of 331.604 (3.b.3) are no longer relevant, because this \$1.00 fee is being repealed altogether. The overall proposal provides an increase in funding for the county land record information system and retains the E-Submission fee at \$3.00 as currently specified in 331.605B.

(3) Fees collected in excess of the amount needed for the purposes specified in this subsection shall be used by the county land record information system to reduce or eliminate service fees for electronic submission of documents and instruments.

Note: The provisions of the current 331.604 (3.e) are addressed in the proposed amendment to 331.604 (5)

e. The recorder shall make available any information required by the county auditor or auditor of state concerning the fees collected under this subsection for the purposes of determining the amount of fees collected and the uses for which such fees are expended.

TABLE OF STANDARD
RECORDING REQUIREMENTS

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.606B					
331.606B (1) Intro	Establishes authority of recorder to decline a document	1. Except as otherwise provided in subsection 7, the county recorder shall refuse any document or instrument presented for recording that does not meet the following requirements:	1. The purpose of document or document formatting standards is to ensure that the documents and associated images are legible and contain the necessary information for the county recorder to perform their duty to create a permanent, unaltered archive and to index information that is accessible and searchable by the citizens of Iowa and by commercial and government organizations. If the content of a document or instrument does not conform to the requirements of this section, or if the form of a document or instrument prevents or inhibits the county recorder from performing their duty, the county recorder may decline to record a document or instrument. The standards may relate to the physical processing or handling of a paper document, the processing of an electronic document, or the content of a document, and they are enumerated as follows.	The new language is intended to provide clarity about the reasons why a document may be declined, to provide clear authority for a recorder to decline a document when certain conditions are not met, and to shift from the directive of "shall refuse" to a more flexible posture - "may decline."	
331.606B (1a)	Provides direction to document preparers concerning the prohibition of binding, stapling and affixing material to a page. The section primarily relates to "physical" documents.	a. Each document or instrument shall consist of one or more individual pages not permanently bound or in a continuous form. The document or instrument shall not have any attachment stapled or otherwise affixed to any page except as necessary to comply with statutory requirements. However, the individual pages of a document or instrument may be stapled together for presentation for recording. A label that is firmly attached with a bar code or return address may be accepted for recording.	a. Each document or instrument shall consist of one or more individual pages in a continuous form. For the purposes of this section, continuous form shall mean individual one-sided pages. A document or instrument in a physical form shall not be permanently bound, have any attachment stapled, taped, or otherwise affixed to any page or contain text or graphics on the back side of a page. However, the individual pages of a document or instrument in a physical form may be clipped together for presentation for recording. A label that is firmly attached to a document or instrument in a physical form with a bar code or return address may be accepted for recording.	The intent of the change is to clarify the meaning of "continuous form" to be one-sided pages, and to clarify that the prohibition of certain practices (binding, stapling, taping or affixing) apply to physical documents (not electronic documents). It also clarifies that physical documents may be "clipped" together for presentation to the recorder. Labels would also continue to be permitted for physical documents.	

TABLE OF STANDARD RECORDING REQUIREMENTS

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.606B (1b)	The primary purpose is to ensure legibility by requiring a minimum font size (12 point) with exceptions for "preprinted text" and surveys.	b. All preprinted text shall be at least eight point in size and no more than twenty characters and spaces per inch. All other text typed or computer generated, including but not limited to all names of parties to an agreement, shall be at least ten point in size and no more than sixteen characters and spaces per inch. If a document or instrument, other than a plat or survey or a drawing related to a plat or survey, presented for recording contains type smaller than eight point type for the preprinted text and ten point type for all other text, the document or instrument shall be accompanied by an exact typewritten or printed copy that meets the requirements of this section.	b. All text shall be in a legible font of at least ten point in size. However, a plat or survey or a drawing related to a plat or survey may contain text in a legible font of at least eight point in size.	The intent is to simply make the minimum font size be 10 point. Surveys could continue to include legible text of at least 8 point. Exceptions for preprinted text and references to characters per inch are removed. These changes should provide more flexibility in the preparation of documents. Text must still be legible.	Requirements for documents prepared by licensed surveyors may be moved to a different section of the Code. There has been some discussion of encouraging preparers to use fonts that are "sans serif" to enhance legibility, but no requirement is suggested. Preparers should be equally interested in legibility, and could opt to use a font which is 11 point or larger.
331.606B (1c)	The is primary purpose of this section is to ensure legibility. If some portion is illegible, the text should be accompanied by a legible copy of the text. This primarily related to documents in physical form, but in some situations could apply to electronic documents.	c. Each document shall be of sufficient legibility to produce a clear reproduction. If a document or instrument, other than a plat or survey or a drawing related to a plat or survey, is not sufficiently legible to produce a clear reproduction, the document or instrument shall be accompanied by an exact typewritten or printed copy that meets the type size requirements of paragraph "b" and shall be recorded contemporaneously as additional pages of the document or instrument.	c. Each document shall be of sufficient legibility to produce a clear reproduction. If all or a portion of a document or instrument, other than a plat or survey or a drawing related to a plat or survey, is not sufficiently legible to produce a clear reproduction, the illegible portion of the document or instrument shall be accompanied by a legible copy as an attachment that meets the type size requirements of paragraph "b" which shall be recorded contemporaneously as additional pages of the document or instrument.	Clarifies that if all or a portion of a document is illegible then a legible copy of the text should be provided as an attachment. The revision also removes the archaic reference to "typewritten" copy.	
331.606B (1d)	The primary purposes of this section are to ensure legibility and to make sure that information in physical form on in a form suitable for processing through copiers and scanners.	d. Each document or instrument, other than a plat or survey or a drawing related to a plat or survey, shall be on white paper of not less than twenty-pound weight without watermarks or other visible inclusions. All text within the document or instrument shall be of sufficient color and clarity to ensure that the text is readable when reproduced from the record.	d.Each document or instrument shall be on standard white paper without watermarks or other visible markings. All text within the document or instrument shall be of sufficient legibility to ensure that the text is readable when reproduced from the record.	Clarifies language concerning standard white paper, replaces the word "inclusions" with the term "markings" and substitutes the word "legibility" for the phrase "color and clarity."	

TABLE OF STANDARD RECORDING REQUIREMENTS

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.606B (1e)	To standardize and ensure the legibility of signatures on official documents or instruments, when these documents are reproduced.	e. All signatures on a document or instrument shall be in black or dark blue ink and of sufficient color and clarity to ensure that the signatures are readable when the document or instrument is reproduced from the record. The corresponding name shall be typed, printed, or stamped beneath the original signature. The typing or printing of a name or the application of an embossed or inked stamp shall not cover or otherwise materially interfere with any part of the document or instrument except where provided by law. Failure to print or type signatures as provided in this paragraph does not invalidate the document or instrument.	e. All signatures on a document or instrument shall be in black or dark blue ink and of sufficient color and clarity to ensure that the signatures are clear and discernable when the document or instrument is reproduced from the record. The corresponding name shall be printed, or stamped beneath the original signature. The printing of a name or the application of an embossed or inked stamp shall not cover or otherwise materially interfere with any part of the document or instrument except where provided by law. Failure to print signatures as provided in this paragraph does not invalidate the document or instrument.	Removed archaic references to “type” and changed the requirement for signatures from “readable” to “clear and discernable.”	
331.606B (1f)	The purpose of this section has been to provide sufficient space for the recording information or stamp anywhere in the top 3 inch margin	f. The first page of each document or instrument, other than a plat or survey or a drawing related to a plat or survey, shall have a top margin of at least three inches of vertical space from left to right which shall be reserved for the recorder’s use. All other margins on the document or instrument shall be a minimum of three-fourths of one inch. Nonessential information including but not limited to form numbers, page numbers, or customer notations may be placed in a margin except the top margin. The recorder shall not incur any liability for not showing a seal or information that extends beyond the margin of the permanent archival record.	f. The first page of each document or instrument, other than a plat or survey or a drawing related to a plat or survey, shall have a top margin of at least one-half inch of vertical space from left to right, and with a blank rectangular space at the top of the first page which shall be three and three-fourth inches in width and two and one-half inches in height reserved and delineated for the county recorder’s use, unless the document is accompanied by a cover sheet . The stamp area shall be adjacent to the top margin. All other margins on the document or instrument shall be a minimum of three-fourths of one inch. Nonessential information including but not limited to form numbers, page numbers, or customer notations may be placed in a margin except the top margin. The recorder shall not incur any liability for not showing a seal or information that extends beyond the margin of the permanent archival record.	Change the requirement for the top margin of the first page to provide more flexibility in the use of the space. The change would simply require a “blank rectangular space at the top of the first page which would be three and three-fourth inches in width and two and one-half inches in height. The actual top margin requirement would be changed to one-half inch. Some systems such as docuSign place information in the top three inches. This does not appear to hinder the recording process and therefore should be allowed. Submitters may continue to provide the full three inch margin if desired.	
331.606B (1g)	Section 331.606A, subsection 2 prohibits preparers from including an individual’s personally identifiable information in a document that is prepared and presented for recording.	g. Each document or instrument presented for recording shall meet the requirements of section 331.606A, subsection 2.	g. Each document or instrument presented for recording shall meet the requirements of section 331.606A, subsection 2. However, a document which includes personally identifiable information shall be recorded provided that the document is subjected to a redaction process as specified in Section 331.606A, subsection 3.	While infrequent, documents submitted for recording sometimes include personally identifiable information (PII). However, because documents are systematically checked for PII and redacted when necessary, the current accept practice is to record the documents and then redact prior to posting them online for public access. This change would allow that practice to continue.	

TABLE OF STANDARD RECORDING REQUIREMENTS

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.606B (2) Intro	The current introductory paragraph to subsection 2 simply introduces the required information on the first page of a document. It also references the three inch top margin.	2. Each document or instrument, other than a plat or survey or a drawing related to a plat or survey, that is presented for recording shall contain the following information on the first page below the three-inch margin:	Each document or instrument, other than a plat or survey or a drawing related to a plat or survey, that is presented for recording shall contain the following information on the first page or on a cover sheet or page as described in subsection 3:	Code section 331.606B, subsection 2 requires certain information to be provided to ensure that the recorder has the information they need to index a document and otherwise perform their recording duties. The current Iowa Code is mostly silent on the use of cover pages, and this revision clarifies their suitability for use. The amendment also removes a reference to the three inch top margin, which would be modified in the revision to 331.606B (1f). Recorders had a discussion about whether to retain this requirement, as customer contact information is included in the interface for E-Submission. Paper documents continue to be submitted for recorded and it has been retained. However, recorders wish to provide preparers with the option to provide an email address.	
331.606B (2a)	This letter paragraph is intended to ensure that the record has the contact information for the preparer of the document Current law provides that users should have be able to observe the name and mailing address of the taxpayer for conveyance instruments.	a. The name, address, and telephone number of the individual who prepared the document.	a. The name, address, and either the telephone number or email address of the individual who prepared the document.		
331.606B (2b)	Requires a return address on the first page for the purposes of returning a document if its declined or needs more information.	b. For any instrument of conveyance, the name of the taxpayer and a complete mailing address.		Simply a question about whether any adjustment is requested by the preparer community.	NO CHANGE
331.606B (2c)		c. A return address.		Documents which are electronically submitted are not returned. Submitters are simply notified. But the return address is retained as many preparers continue to submit physical documents.	NO CHANGE
331.606B (2d)	Requires the title of the document to be displayed on the first page. Requirements for inclusion of grantors' details.	d. The title of the document or instrument.	d. The title or type of the document or instrument.	For clarity, the term "type" is added. The term "document type" is more commonly used in the property industry today. This is simply to reference the use of both terms.	
331.606B (2e)	Requirements for inclusion of grantees' details.	e. All grantors' names.			NO CHANGE
331.606B (2f)		f. All grantees' names.			NO CHANGE

TABLE OF STANDARD
RECORDING REQUIREMENTS

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.606B (2g)	Requirements for inclusion of grantors' details.	g. Any address required by statute.		Simply a question about whether any adjustment is requested by the preparer community.	NO CHANGE
	A requirement to include the legal description of a property, if required. Such requirements are elsewhere in the Code, it is presumed.			A weakness in the land records database is the inconsistent presence of this information – which is the basis for indexing and searching by location. Specifying more clearly the requirement for this “parsed” information, in addition to the full legal description can aid the indexing process and improve the utility of search tools. The requirement for a “parcel identification numbe is retained, but moved to a separate lettered paragraph. Can the parsed location information be included on the first page (or a cover page), while a "full" legal description can follow or be placed elsewhere in the document?	
331.606B (2h)		h. The legal description of the property and parcel identification number, if required.	h.The legal description of the property, if required. When a legal description is required, the parsed location information shall also be provided including the quarter section, section, township, and range, or the lot, block, subdivision name, section, township, range, and city, town or county as applicable.		
	The purpose of this section appears to be present a related document or instrument reference number, a.k.a. an associated reference.			Iowa Land Records and county recorders are placing greater emphasis on linkages between associated references. This utility appears to be popular among users. In order to tak full advantage, it is important that document preparers include this information in the documents submitted for recording. It is unclear what any other statutory requirements there may be.	
331.606B (2i)		i. A document or instrument number for statutory requirements, if applicable.	i. A recording reference number of an associated, recorded document or instrument as required by the county land record information system, or for other statutory requirements, as applicable.		
	Section 331.606B (2h) reference parcel identification numbers would be relocated for clarity. The purpose of it being in the current statute appears to be to ensure that the information is indexed and searchable.			The language here is intended to clarify that the parcel identification number should be provided in the document if it is related to property, i.e., if it is "applicable". Also, the parcel identification number should be the number for the parcel(s) at the time of recording. Iowa Land Records intends for the PIN to be used for historical reference. This change could increae the use of parcel identification numbers. Going forward, a challenge will be that county PIN formats vary.	
331.606B (2j)		NEW lettered paragraph.	j.The current parcel identification numbers, as applicable.		

TABLE OF STANDARD RECORDING REQUIREMENTS

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.606B (2) new		NEW unnumbered paragraph.	A document or instrument may also contain the contact information of the person who is best able to address any issue affecting the recordability of the document or instrument. The information specified in this section is for the purpose of providing the information necessary for recording and indexing a document or instrument and to facilitate public access to information. Document information necessary to execute a transaction or to have legal effect shall be included in a document as determined by the parties in accordance with established legal standards.	In addition to the preparer and return address information, organizations would be encouraged to provide contact information for the person who is best able to address any issue affecting the recordability of the document or instrument. In this version, it is presented as option in a concluding, unlettered paragraph. Iowa Land Records and county recorders seek to improve communications in the recording process.	
331.606B (2) new		NEW unnumbered paragraph.		The intent here is to clarify that the information specified in Subsection 2 is for the purpose of facilitating the indexing of recording information and any information intended to have legal effect is up to the parties. If there are suggested edits they would be welcomed. This revision and the new lettered paragraphs are intended to specify the different ways that the information can be provided: on the first page, included in a cover page, or included on another page provided that a page reference is present on the first page. This new language further clarifies that a cover page is acceptable. Not included is the concept of an "Index Legend". That could be added if there is interest.	
331.606B (3) Intro	The intent of this section in the current Code is to clarify that if there is insufficient space on the first page for any required information, a simple page reference can be noted on the first page.	3. If insufficient space exists on the first page for all of the information described in subsection 2, the page reference of the document or instrument where the information is located shall be noted on the first page.	The information specified in 331.606B, Section 2 may be provided in one of the following forms. a. As a part of the first page of a document or instrument.	Restates that the information can be included on the first page.	
331.606B (3a) new		NEW lettered paragraph.	b. As a cover sheet or page accompanying a document or instrument in a format approved by the county land record information system. A cover sheet shall be recorded contemporaneously as an additional first page to the document or instrument. A cover sheet shall conform to Section 31.606B, subsection 1. c. If insufficient space exists on the first page or a cover sheet for all of the information described in subsection 2, the page reference of the document or instrument where the information is located shall be noted on the first page or cover sheet.	More explicitly authorizes the use of a cover sheet which must conform to the formatting requirements in 331.606B, subsection 1. See also the current language in 331.606B (4b) for a reference to "a cover sheet approved by the governing board of the county land record information system".	
331.606B (3b) new		NEW lettered paragraph.			
331.606B (3c) new		NEW lettered paragraph.		Continue to authorize the use of a page reference if insufficient space exists for all the information described in subsection 2.	

TABLE OF STANDARD
RECORDING REQUIREMENTS

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.606B (3d) new		NEW lettered paragraph.	d. An attestation statement, or any information intended to have legal effect shall not be included on the cover sheet.	This is intended to clarify that a cover sheet should not include information intended to have a legal effect. In part, this is because a cover sheet, used primarily for the recording process, may not be present when a document is executed. If there are suggested edits they would be welcomed.	Requirements for documents prepared by licensed surveyors may be moved to a different section of the Code.
331.606B (4a)	Proposed Repeal				Requirements for documents prepared by licensed surveyors may be moved to a different section of the Code.
331.606B (4b)	Proposed Repeal				
331.606B (5) Exempt					NO CHANGE
			A physical document or instrument declined for recording by a recorder shall be returned to the submitter or preparer accompanied by an explanation of the reason for the action to decline the document. When an electronic document or instrument submitted through the county land record information system is declined for recording by a recorder, the recorder shall notify the submitter of the reason for the action to decline the document.		
			Whenever practicable, the recorder shall also advise the preparer or submitter of any actions necessary to correct the document or instrument.		
331.606B (6)	Requires that a rejected document or instrument be returned to the preparer with an explanation of the reason for rejection.	6. A document or instrument rejected for recording by a recorder shall be returned to the preparer or presenter accompanied by an explanation of the reason for rejection.	When a recording fee for an electronic document is adjusted to correct an error in the calculation of a fee, the submitter shall be notified of the reason and basis for adjusting the recording fee.	Language is proposed to indicate that when a physical document is declined by a recorder, it should be returned to the submitter or preparer. However, when an electronic document is declined by a recorder, the submitter or preparer should simply be "notified." This is in keeping with current practice. Language is added to encourage communication on error corrections and fee changes. In lieu of the term "rejection", the term "declined" is substituted - consistent with the modifications made to the introduction to 331.606B(1)	

TABLE OF STANDARD
RECORDING REQUIREMENTS

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.606B (7a)		7. a. On and after July 1, 2005, a document or instrument that does not conform to the format standards specified in subsections 1 through 3 shall not be accepted for recording except upon payment of an additional recording fee of ten dollars per document or instrument. The requirement applies only to documents or instruments dated on or after July 1, 2005, and does not apply to those documents or instruments specifically exempted in subsection 5.	Repealed	Subsection 7a is recommended for repeal in conjunction with the fee modernization proposal to simplify the calculation of recording fees.	
331.606B (7b)		5. On and after July 1, 2009, a document or instrument that does not conform to the format standards specified in subsection 1, paragraphs "c" and "e", or subsection 2, paragraph "b", shall not be accepted for recording. This paragraph applies only to documents or instruments dated on or after July 1, 2009, and does not apply to those documents or instruments specifically exempted in subsection 5.	Repealed	Subjection 7b is unrecommended for repeal as the revised introduction to 331.606B(1) provides clear authority for the recorders to decline documents which do not conform to the revised standards. It is possible that current statutes which provide for a recording fee for "additional transactions" may be repealed. This would mean that a document making assignments concerning multiple parcels would no longer be charged more than a base recording fee. However, for certain transactions, such as mortgage releases, it is a best practice to address those transactions in in separate documents or instruments. Multiple transactions involving different parties should not be incorporated in the same document or instrument.	
331.606B ()		NEW numbered subsection.	A document or instrument which executes a transaction for the conveyance of property , the provision of financing, or the release of a legal or financial obligation, shall be applicable only to the parties participating in the same transaction, and shall not be applicable to multiple parties participating in different transactions.		
331.606					

TABLE OF STANDARD RECORDING REQUIREMENTS

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.606 (1)	Generally this section of the Code is intended to define the indexing requirements in local county land records managemetn systems.	1. In addition to other requirements specified by law, the recorder shall note in the county system the date of filing of each instrument, the number and character of the instrument, and the name of each grantor and grantee named in the instrument. In numbering the instruments, the recorder may start with the number one immediately following the date of annual settlement with the board and continue to number them consecutively until the next annual settlement with the board or the recorder may start with number one on the first working day of the calendar year and continue to number the instruments consecutively until the last working day of the calendar year.	1. In addition to the information specified in section 331.606B(2), section 558.49 and other requirements specified by law, the recorder shall note in the county land records management system the date of recording of each instrument, the number, type or title, and character of the instrument, and the name of each grantor and grantee named in the instrument. In assigning reference numbers to the documents or instruments, the recorder shall start with number one on the first working day of the calendar year and continue to number the instruments consecutively until the last working day of the calendar year. Reference numbers shall not include letters or special characters. Reference numbers shall include the county two-digit numeric prefix and the four-digit year preceding each reference. In addition to the standard reference number, the recorder may also assign a book and page reference to a document or instrument.	The proposed language is intended to align the requirements for indexing in 331.606, subsection 1 with the requirements of sections 331.606B(2) and 558.49. Some terminology is modified to align with current practices. A common standard for reference numbers is also established while allowing for the continued use of book and page references.	
331.606 new unnumbered 1		NEW	When present in a document, associated recording references shall be indexed with the recorded document and with any referenced antecedent documents. References shall also be indexed for concurrently recorded associated documents. When a recorded document includes a legal description, parsed location information shall be indexed. For platted land, the indexed location information shall include the lot, block, subdivision name, the name of the applicable city, town or county, and section, township and range numbers. For land which is not platted, the indexed location information shall include the section, township, range and quarter section. Indexing of a quarter quarter section is recommended but not required. If a county department uses an additional parcel identifier such as a capitalized alphabetic character, or a character string of numbers separated by a hyphen, it shall be indexed as an additional parcel identifier as specified by the county land record information system.	Language is added to clarify that associated references, when present, shall be indexed. More consistent indexing of associated references will improve the utility and searchability of the index information.	
331.606 new unnumbered 2		NEW		Lanuage is added to clarify that parsed location information shall be indexed. More consistent indexing of parsed location information will improve the utility and searchability of the index information. Further, the language defines the meaning of an "additional parcel identifier" and provides direction on how it should be indexed.	

TABLE OF STANDARD
RECORDING REQUIREMENTS

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.606 new unnumbered 3		NEW	When present in a document or instrument submitted for recording, parcel identification numbers shall be indexed. If a parcel identification number is modified by the county, such as for a subdivision or a consolidation of a parcel, the county auditor shall timely provide any updated parcel identification number information to the recorder which shall be added to the index of the applicable recently recorded document as soon as practicable.	Language is added to clarify that parcel identification numbers shall be indexed. Further, if a parcel identification number is modified by a county, the modified information must be provided to the county recorder so that it can be added to the index.	
331.606 new unnumbered 4		NEW	The parcel identification number index information for previously recorded antecedent documents shall not be modified unless it is for the purpose of correcting an error.	This new paragraph clarifies that updating the index for previously recorded documents would not be required unless it is to correct an error.	
331.606 (2)	Requires that the time of filing to be included in the index.	2. The recorder shall also note in the index the exact time of the filing of each instrument.	2. The recorder shall also note in the index the exact time of the recording of each instrument which shall be accurate to the second.	Language is added to include the exact time of filing. Recording times going forward would be required to accurate to the second in all recording jurisdictions. Accuracy to the millisecond would optional. The standard practice is to index the recording time, not the time of filing, and therefor a terminology change is suggested.	
331.606 (3)		3. The county recorder may give the county sheriff the records filed under this chapter pertaining to the sale and registration of weapons or may dispose of those records if the sheriff does not wish to receive the records. 4. The recorder shall permanently archive an unaltered version of each recorded document or instrument. A document or instrument may be archived in its original format, as an electronic document, or in another format suitable for preserving information in the document or instrument. A person may view and copy an original or unaltered document or instrument in the office of the recorder.			NO CHANGE
331.606 (4)					NO CHANGE
558.49	Defines the conveyance information that should be included in a recording.				
558.49 (Intro)		The recorder must shall keep index records to show the following:			NO CHANGE

TABLE OF STANDARD RECORDING REQUIREMENTS

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
558.49 (1)	Requirements for inclusion of grantor information.	1.Each grantor.			NO CHANGE
558.49 (2)	Requirements for inclusion of grantee information.	2.Each grantee.			NO CHANGE
558.49 (3)	Requires that the time of filing is included in the index.	3. The date and time when the instrument was filed with the recorder.	3.The date and time when the instrument was recorded by the recorder.	The standard practice is to index the recording time, not the time of filing, and therefor a terminology change is suggested.	
558.49 (4)	Requires that the time of execution be indexed.	4. The date of the instrument.	4. The date on which the document or instrument was executed by the parties, to the extent practicable. If there is a variance in the date of execution by the parties, the most recent date shall be indexed.	Language is suggested to clarify the meaning of "date of instrument", and also to clarify which date should be indexed, if not the same.	
558.49 (5)	Requires that the "nature" of document is included in the index.	5. The nature of the instrument.	5. The nature of the instrument, as indicated by the title or type of the document or instrument.	The phrase "nature of the instrument" may be intended to mean the action of the instrument, often represented by its "title" or "type". Examples are dee, mortgage, power of attorney, etc. The new language here is to clarify this by referencing the terms "title" or "type" along with the phrase "nature of the instrument." Document type, for exampled, is typically indexed, and therefore may be more understandable.	
558.49 (6)	Requires the inclusion of the document reference number for a recording to be indexed.	6. The document reference number where the record of the instrument may be found.	7. The parsed description of the real estate affected by the document or instrument, as indicated by the location information including the quarter section, section, township, and range, or the lot, block, subdivision name, section, township, range, and city, town or county, if platted.	This addition language is intended to clarify parsed location information for conveyance document is meant to be indexed.	NO CHANGE
558.49 (7)	Requires that the description of the property to be indexed.	7. The description of the real estate affected by the instrument.			

TABLE OF STANDARD
RECORDING REQUIREMENTS

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
558.49 (8) NEW		NEW	8. Any recording reference number of an associated, recorded document or instrument, when present on a document submitted for recording.	It is proposed that section 558.49 be amended to add associated references to the list of elements required in the recorders index for conveyance documents. More consistent indexing of associated references, including references between succeeding conveyance documents, will improve the utility and searchability of the index information.	
558.49 (9) NEW		NEW	9. The parcel identification number, when present on a document submitted for recording. Updated parcel identification number information shall be added to the index of any recently recorded conveyance document.	It is proposed that section 558.49 be amended to add parcel identification numbers to the list of elements required in the recorders index for conveyance documents. More consistent indexing of parcel identification numbers will improve the utility and searchability of the index information.	
	331.601A	As used in this part, unless the context otherwise requires: 1. "Batchbasis" means the delivery of an accumulation of electronic documents or records recorded or maintained by the county recorder. 2. "Document" or "instrument" means a writing or drawing presented to the recorder for recording, consisting of one or more pages of text and attachments. 3. "Electronic document" means a document or instrument that is received, processed, disseminated, or maintained in an electronic format. The submission of an electronic document through the county land record information system electronic submission service shall be equivalent to delivery of a document through the United States postal service or by personal delivery at designated offices in each county. Persons who submit electronic documents for recording are responsible for ensuring that the electronic documents comply with all requirements for recording.			
331.601A (1)					NO CHANGE
331.601A (2)					NO CHANGE
331.601A (3)					NO CHANGE. Note: The last two sentences of this section may be relocated to a new section of the Code relating to the Electronic Services System or county land record information system

TABLE OF STANDARD RECORDING REQUIREMENTS

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.601A (4)		4. "File or submit" means the act of delivering a document or instrument to a recording office for recording into the public records.			NO CHANGE
331.601A (5)		5. "Grantor and grantee" means the names of the transferor and transferee in the transaction used to create the recording index.			NO CHANGE
331.601A (6)		6. "Legible" means capable of being read or deciphered without magnification regardless of the recording process.			NO CHANGE
331.601A (7)	The county recorder statutes in chapter 331 include several references to "pages" including 331.604 (basis for recording fees), and 331.606B (formatting of pages, and the "first page" recording information). The current law focuses on traditional letter or legal sized documents.	7. "Page" means a writing, printing, or drawing, other than a plat or survey or a drawing related to a plat or survey, occurring on one side only and covering all or part of such side, and not larger than eight and one-half inches in width and fourteen inches in length.	7. "Page" means a writing, printing, or drawing, other than a plat or survey or a drawing related to a plat or survey, occurring on one side only and covering all or part of such side, and not larger than eight and one-half inches in width and fourteen inches in length. For the purposes of a plat of survey or a drawing related to a plat of survey, "Page" also means a writing, printing, or drawing occurring on one side only and covering all or part of such side, and with dimensions of eleven inches by seventeen inches or up to twenty-four inches by thirty-six inches.	Additional language is inserted to clarify the definition of a page in the context of land surveys which commonly have larger dimensions.	
331.601A (8)		8. "Record" means a process whether by manual, mechanical, electronic, optical, magnetic, microfilm, or other methods of storage, after filing or submission, to incorporate a document or instrument into the public record.			NO CHANGE
331.601A (9)	Defines "transaction" as a specific legal action documented.	9. "Transaction" means a specific legal action in the form of or evidenced by one of the following: a. A title or caption including but not limited to a deed, deed of trust, mortgage, or power of attorney. b. A subsequent reference to an original document or instrument including but not limited to an assignment or release or satisfaction of mortgage.	9. "Transaction" means a specific legal action in the form of or evidenced by one of the following: a. A title or caption including but not limited to a deed, deed of trust, mortgage, or power of attorney representing an action such as the conveyance of property, the provision of financing, or the power to act on behalf of another person. b. A subsequent action reference referring to an original action as represented by a document or instrument including but not limited to an assignment or release or satisfaction of mortgage. A simple reference to a previous action which itself takes no subsequent action is not a transaction.	In the context of the laws concerning county recorders, the term transaction is primarily used in the calculation of recording fees. A recording fee is to be charged for each "additional" transaction included in a recording document. Sometimes a reference is misinterpreted as a transaction in the calculation of the recording fee. The suggested amendment would clarify the meaning and presumably make the recording fees more consistent. Note: it is possible that the additional transaction fee may be REPEALED.	

Modification Likely - ISBA

Survey Recording
Requirments
(DRAFT)

Current or Proposed Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.612(1) Recording of Surveys			As used in this part, unless the context otherwise requires: Parcel Identification Number means the unique identification number designated to each piece of real estate as recorded in the book of plats under section 558.63.	New section 331.612 (4c) would require a PIN in the index legend	
331.612 (1a)		NEW	Additional Parcel Identifier means a capitalized alphabetic character, or a character string of numbers separated by a hyphen used to identify a proposed separate piece of real estate represented on a plat or survey or a drawing related to a plat or survey.	New section 331.612 (4b) would require an additional parcel identifier, if applicable, in the index legend	
331.612 (1b)		NEW	Documents and Instruments. Notwithstanding the document formatting standards specified in Section 331.606B, this section shall apply to each document or certificate prepared and signed by a licensed professional land surveyor which is submitted for recording.	Current statute specifies which document types the formatting requirements apply to. This modification would apply the requirements to any document prepared by a licensed surveyor.	
331.612 (2)		NEW	Formatting Surveys for Recording. Any survey document which is submitted to a county for recording as described in this section shall conform to the following requirements.	Current statute specifies which document types the formatting requirements apply to. This modification would apply the requirements to any document prepared by a licensed surveyor.	
331.612 (3)		NEW	Contain text in a legible font of at least eight-point in size.	Maintains eight-point font standard in this new section.	Possible amendment to 331.606B(1b)
331.612 (3a)		NEW	Provide font colors, signatures and drawings which have sufficient weight, contrast and darkness to be reproducible.	Aligns with the updated 331.606B(1b, 1c, and 1e), and adds a reference to weight, contrast and darkness to ensure legibility.	Possible amendment to 331.606B(1c)
331.612 (3b)		NEW	Physical documents submitted to a county for recording shall be on standard white paper without watermarks or other visible markings and shall have a dimension which is no greater than eleven by seventeen inches.		
331.612 (3c)		NEW		Aligns with the updated 331.606B(1d)	Possible amendment to 331.606B(1d)
331.612 (3d)		NEW	Notwithstanding the dimensions specified for physical documents in this section, a physical document with a dimension of up to twenty-four inches by thirty-six inches may be submitted to the county if the county is able to scan or digitize the document while maintaining the original scale and quality of the document as specified in paragraphs a through c in this section.	Aligns with current ESS policy and for the first time establishes the standard in the Iowa Code.	Related to revised 331.601A (7)

Survey Recording Requirements

(DRAFT)

Electronic documents submitted to a county for recording through the county land record information system shall have a dimension which is no greater than twenty-four inches by thirty-six inches. Provide an Index Legend which includes information required for indexing and recording by the county recorder as specified in section 4. Provide a blank rectangular space three and three-fourth inches in width and two and one-half inches in height reserved and delineated for the county recorder's use, unless the document is accompanied by a cover sheet approved by the governing board of the county land record information system. Index Legend Content. An Index Legend shall be presented as a compact table or grid with lines and a reasonable separation of the data elements. For all survey documents the following data elements are required in the index legend

County Name
Parsed location description. If not platted: Section, Township, Range, Quarter Section, and Additional Parcel Identifier if applicable. The quarter quarter section is optional. if platted: Lot/Unit, Block, Subdivision Name (without abbreviation), Town/City/County as applicable, Section, Township and Range, and Additional Parcel Identifier, if applicable.

The current Parcel Identification Number

Proprietor: Name (if applicable and if multiple proprietors – only one is required)

Requested By: Name
Any known Associated Reference to a previously recorded survey document for the property

The surveyor's name, mailing address, and phone number or email address

Information necessary for the county recorder to return the survey document

Aligns with current ESS policy and for the first time establishes the standard in the Iowa Code.

Consolidates survey document standards in one primary Code section.

Consolidates survey document standards in one primary Code section.

Consolidates survey document standards in one primary Code section.
Establishes the element as a standard component of the index legend for any survey type.

Incorporates section, township, range data elements into indexing for platted land, and adds the "additional parcel identifier" Incorporates PIN information into indexing surveys.

Establishes the element as a standard component of the index legend for any survey type.

Establishes the element as a standard component of the index legend for any survey type.

Clarifies that associated references to previously recorded surveys, if known. Establishes the element as a standard component of the index legend for any survey type.

Establishes the element as a standard component of the index legend for any survey type.

Related to revised 331.601A (7)

Replaces 331.606B(4a)

Replaces 331.606B(4b)

Replaces 355.6A (4c)

Possible amendment to 331.606B(2)

Replaces 355.6A (4c),
Related to 355.6A (4b)

Replaces 355.6A (4c)

Replaces 355.6A (4c)

Replaces 355.6A (4c)

Replaces 355.6A (4c)

Replaces 355.6A (4c)

Replaces 355.6A (4c)

Survey Recording
Requirments

(DRAFT)

Additional information if the survey document is a monument preservation certificate including the following: The name of the government entity or other organization under which the surveyor provided the professional service, and the name of the government entity or other organization requesting the monument preservation certification as provided in 355.6A

Integrates information specific to monument preservation certificates into the overall requirements, when applicable

Replaces 355.6A (4c)

331.612 (4i)

NEW

4. a. The monument preservation certificate shall be filed with the county recorder pursuant to section 331.606B, subsection 5, no later than thirty days after the certificate is signed by the surveyor

355.6A (4a)

b. The county recorder shall index the monument preservation certificate according to the township, range, section number, and quarter section on which the monument is located within. If the monument is located within an official plat, the county recorder shall index the certificate alphabetically by the official plat name.

355.6A (4b)

The index legend affixed to such certificate shall include the following information: (1) The surveyor's name, mailing address, and other contact information. (2) The name of the governmental entity or other organization under which the surveyor provided the professional service. (3) The aliquot part or parts of the United States public land survey system or portion of official plat that the monument is located within. (4) The name of the governmental entity or other organization requesting the monument preservation certificate pursuant to this section. (5) Information necessary for the county recorder to return the certificate.

355.6A (4c)
355.10

Proposed Repeal

4. a. The monument preservation certificate shall be filed with the county recorder no later than thirty days after the certificate is signed by the surveyor

Removes an incorrect reference to 331.606B(5).

b. The county recorder shall index the monument preservation certificate according to the township, range, section number, and quarter section on which the monument is located. If the monument is located within an official plat, the county recorder shall also index the certificate alphabetically by the official plat name.

Makes a minor editorial change by removing the word "within".

See the proposed new section 331.612(4)

**Survey Recording
Requirments
(DRAFT)**

355.10 (1)	1. The surveyor shall record a plat and description with the county recorder no later than thirty days after signature on the plat by the surveyor if the survey was made for one of the following purposes: a. To correct boundaries and descriptions of land. b. For the division of land. c. Toretrace an existing recorded description of a parcel or tract of land.	NO CHANGE
355.10 (2)	2. The plat and description shall show distinctly what piece of land was surveyed, the surveyor, and the date of the survey.	NO CHANGE
355.10 (3)	3. The thirty-day requirement shall not apply to subdivision plats.	NO CHANGE
355.12	The recorder shall index survey documents and United States public land corner certificates by township, range, and section number. If the survey is in a recorded subdivision, the recorder shall also index the document alphabetically by subdivision name. 1. A plat of survey prepared pursuant to this chapter and a subdivision plat, with attachments, shall be recorded in the office of the county recorder, and an exact copy of the plat shall be filed in the offices of the county auditor and assessor. A replat of any part of an official plat pursuant to section 354.25, or a recorded subdivision plat of any part of an existing official plat shall supersede that part of the original official plat, including unused public utility easements.	NO CHANGE
354.18 (1)		NO CHANGE

Survey Recording
Requirments
(DRAFT)

The recorder shall examine each plat of survey and subdivision plat to determine whether the plat is clearly legible and whether the approval by the applicable governing body and the other attachments required by this chapter are presented with the plat. The recorder shall also keep a reproducible copy of the plat from which legible copies can be made. The recorder may specify the material and the size of the plat, not less than eight and one-half inches by eleven inches, that will be accepted for recording in order to comply with this section. The recorder shall not record a subdivision plat that violates this chapter.

May need further review concerning the dimension of the document.

Each document or certificate prepared by a licensed professional land surveyor and presented for recording, including a plat of survey or a drawing related to a plat of survey, shall contain an index legend. However, this requirement shall not apply to a United States public land survey corner certificate described in section 355.11.

See new section 331.612 (3f)

Each document or certificate prepared by a licensed professional land surveyor and presented for recording, including a plat of survey or a drawing related to a plat of survey, shall include a blank rectangular space three and three-fourth inches in width and two and one-half inches in height reserved and delineated for the county recorder's use, unless the document is attached to a cover sheet approved by the governing board of the county land record information system.

See new section 331.612 (3g)

Service Summary: Individuals or companies would have access to a notification service which will inform them of actions relating to property located in the State of Iowa. Property notifications would be based on either a name of a party (person or company) or a specific document recorded in an Iowa county.

- **Name Notification Service.** A user would enter a name(s) into an interface. The name could be a person or a company/organization. An email notification would be sent to the user if a document was recorded in any county in the State of Iowa which had a party name matching the name(s) provided by the user. The notification would include the following information: county name, recording date, recording reference number document type.
- **Associated Document Service.** A user would enter a reference number and date of recording for a particular document (such as a deed) recorded in an Iowa county. An email notification would be sent to the user if any subsequent document which has an associated reference to the specified document is recorded by the county.

Central Authentication System (CAS): ESS administers a central authentication system to manage the users of any ESS service. Users of the Notification System will be required to register with ESS CAS, and they will be required to have a user ID and password. Users of the Iowa Land Records search system will be automatically eligible to participate in the notification system. Organizations will also be able to access the notification system, and their users may be granted access to the notification system as well – subject to the approval of their organization's administrators.

Individual User Workflow: An individual who is not already a registered user will be directed to the Individual Application at <https://iowalandrecords.org/ess-individual-search-application>. The application form will include a checkbox under the "Application Authorization Request" which would read "I request authorization to access the Iowa Land Records Notification System." This would be in addition to the checkbox which reads "I request authorization to access the Iowa Land Records Individual Search Service"

An individual user would log in to the CAS system and if set up for participation in the notification service, they would be presented with a welcoming landing page with an option to set up notifications by either name or document. The user would be asked to select the notification type (name or document).

If the user selected notification by name, the user would be asked to enter a person's last name/first name or an organization's name. Search conventions used by ESS and Iowa Land Records would apply. This means that the user would be instructed to enter a character string showing what the last name and then first name "starts with" or alternatively, showing what the organization name "starts with". A search "wild card" would be enabled and the user would be encouraged to enter the wild card (the asterisk "*") character at the end of the character string. Behind the scenes the system would search for documents which match the name(s) entered on documents recorded after setting up the notification rules.

If the user selected notification by document, the user would be asked to enter the county name, the recording reference number and the date on which the document referenced document was recorded. The reference number (or book and page) must match exactly, and no “wild card” will be allowed.

Individual Search Users: Individuals who are registered users of the Iowa Land Records search application could be enabled for the notification service at the time of their initial registration, or the service could be added at a later time by adding the notification “permission” to their registration. This would be handled through CAS user management functions. Registered Search users could easily search for the document. A function could be added to the search results to “copy” the information for use in the notification system, or to “mark” a record for monitoring. As noted previously, once “marked”, the user would receive an email notification when any subsequent document which has an associated reference to the specified document is recorded by the county.

Organization Users: ESS provides search and e-filing services to organizations with professional responsibilities in the real estate industry. Administrators for those organizations may choose to enable their organizations to participate in the notification system to monitor recording activity associated with names or with certain documents. Those administrators may also grant permissions to their employees to access the notification system. However, an organization’s users would not be permitted to use the service for personal reasons. In this situation, the users would be expected to use the notification system for only business purposes such as monitoring when a satisfaction of mortgage is recorded for a specified mortgage. For personal use they could set up an individual user account.

Usage Requirements: ESS implements various rules and requirements to ensure that services are not abused. For example, individual search users have certain limits on how many document images can be viewed in one day. The limitations presume that an individual might want to look up their own records but have no need to view hundreds of records each day. Similarly, it is presumed that an individual notification system user would wish to monitor their own records or the records of a close family member.

On the other hand, an organization user who is responsible for many different transactions might have a greater need for monitoring more records - perhaps for a shorter period of time.

For these reasons the following usage requirements might be applied.

- Individual notification users would be limited to no more than nine notification profiles.
- Users would be encouraged to choose their notification criteria carefully in order to maximize the utility of the system. For example, a profile searching for a name using a wild card might be more useful than a singular spelling of a name.
- Users would also be encouraged to use the regular search tools to look up other information of interest.
- Notification profiles could be modified at any time by an individual user, including extending the expiration date – but for no more than four years.
- Notification profiles would, by default, be set to remain active for four years.

- Users with notification profiles approaching the expiration date would be sent a reminder email 30 days prior with instructions on how to renew.
- Individual users should be aware CAS accounts are automatically deactivated if they do not log in at least once every 120 days. Accounts can be reactivated by contacting support@clris.com.
- Notifications will remain active even when a user account has been deactivated.
- Notifications will be purged if a user remains inactive for a period of four years.
- Individual users are responsible for maintaining their user email addresses to ensure that communications are successful.
- Organization administrators would be authorized to enable users to access the notification service.
- The number of allowed notification profiles for organization notification users could be increased if there was sufficient interest or need.
- Notification profiles could be modified at any time by the authorized organization user.
- Notification profiles for organization users would be set to remain active for up to one month. (This could be increased if there was sufficient interest or need) However, the duration could be extended for additional one-month periods
- Organization user CAS accounts are also automatically deactivated if they do not log in at least once every 120 days. Accounts can be reactivated by contacting support@clris.com.
- Notifications will remain active even when a user account has been deactivated.
- Organization administrators and users are responsible for maintaining their user email addresses to ensure that communications are successful.

All users are required to comply with the ESS terms of service, and accounts may be deactivated if users do not comply with the requirements and terms.

Accessing Notification Information: As noted in the Service Summary (introduction), notification information would be provided via email. For individual users, a matching name notification would provide the Notification Type, Notification Element, Recording Date, County, and Document Type of the newly recorded document(s). If there were multiple documents the email should include a table showing each.

A matching associated reference in a county would also result in an email with the Notification Type, Notification Element, Recording Date, County, and Document Type of the newly recorded document(s)

In both cases users would be instructed to contact the county recorder for more information, or to use the search application.

For organization users who have permission to use the Search application, notification would also be provided via email. The user would be prompted to log into CAS if not already logged in.

Interface Description: In the left navigation bar of the ILR Search application, under the display of “Saved Searches”, a label (while on blue background) with the word “Notifications” would be displayed. The label would be an active link, and selection of the link would display a new “Notifications” page similar in format to the current “Name Search” page.

At the top of the page, under the menu bar, the label “Notifications” would be displayed. Underneath the Notifications label, the following choices would be displayed as radio buttons:

- ILR Notification by Person Name
- ILR Notification by Organization Name
- ILR Notification by Document Reference

Selection of the ILR Notification by Person Name would result in the display of the following form fields.

Last Name
First Name
Counties
Date

Selection of the ILR Notification by Organization Name would result in the display of the following form fields.

Organization Name
Counties
Date

Selection of the ILR Notification by Document Reference would result in the display of the following radio button options

- Book/Page Reference
- Reference Number

Selection of the ILR Notification by Book/Page Reference would result in the display of the following form fields.

County
Book
Page
Recording Date

Selection of the ILR Notification by Reference Number would result in the display of the following form fields.

County
Reference Number
Recording Date

A “Create Notification” button would be displayed.

Selection of the Create Notification button would result in the display of a form field with the label of “Notification Name” – accompanied by a “Save” button. (A user could choose not to save by clicking outside of the form field area or by pressing the “esc” button on the keyboard.

Note: The wild card (*) option would be operational for both first and last name, and also for organization name. Users

Note: Up to five individual counties could be selected (same parameters as for the ILR name search). Users would be advised to select counties in which relevant property or business activity is located.

Note: For name notifications, the default date would be the current date, and the selection of a past date would not be permitted. The intent of the name notification system is to be forward looking. If a NEW document is recorded matching the specified criteria, a notification would be issued. Users would be permitted to modify the date to a new current date which would have the effect of extending the notification period.

Note: for reference notifications, the date entered must be the exact date recording for the document or instrument. The intent of the name notification system is to be forward looking. If a NEW document is with an associated reference recorded pointing to the identified document, a notification would be issued.

Note: Users who do not log in to the ILR search/notification application within a 120 day period are automatically deactivated for security reasons. The user may request reactivation by contacting support at support@clris.com.

Note: For the initial application notifications will be delivered via email. Resources permitting, an SMS notification may be added to the notification system.

As with saved searches, an individual user would be allowed up to nine separate notification options. Users would be encouraged to enter the wild card (the asterisk “*”) character at the end of a name character string to ensure that recordings using alternate spellings are captured. Similar to saved searches, a “See all” link will be displayed to show all saved notifications.

Customer Dashboard: In the left navigation bar of the ILR Search application, under the display of “Saved Searches” and “Notifications” the label “Dashboard” would be displayed. The label would be an active link, and selection of the link would display a new “Dashboard” page. The dashboard would include a widget showing the most recent notifications. The notifications would be displayed in a table format with the following column headings.

Notification Type	Notification Element	Recording Date	County	Document Type	
Person Name	Smith, John	082224	Linn	Deed	
Organization					
Name	XYZ Contracting	082121	Jasper	Mortgage	
Reference	77202400001234	081924	Polk	Lien Release	

Note: Column headings could be enabled for sorting.

Note: Data elements could be filtered.

Note: Dash board could include a link to the recorders directory

Purpose: Limit public access to records associated with a specific party or parties. Limitations would apply to both search results and entire documents. Redaction of names would no longer be a part of the process. This method is generally referred to as “information shielding”.

Process: Eligibility for participation could be similar to the current law:

Individual Qualified for “Information Shielding” means one of the following:

- i. a peace officer, as defined in section 801.4, civilian employee of a law enforcement agency, or state or federal judicial officer or state or federal prosecutor
- ii. a former peace officer, as defined in section 801.4, or a former civilian employee of a law enforcement agency who presents evidence that there is a compelling safety interest

[Note: Potentially it could also include victims of domestic violence or abuse confirmed by an official court officer. Iowa Safe at Home participants possibly could be eligible. Options are being reviewed.]

An application and review process like the current system would be implemented.

Record shielding would be temporary and not perpetual. Four years is the current limit. However, shielding could be extended with justification.

Authorized Access to Shielded Information: Land Title/Loan Process Exceptions: In order to prevent unintended consequences associated with loan applications and verification of title, access to online records would be granted to individuals with authorization. Certain registered users could be authorized to have general access to any record based on their professional responsibilities. Examples of a professional who would be bound by their Code of Ethics and Iowa law might include:

- A licensed member of the Iowa Bar
- A participating attorney, abstractor, closer or associated personnel who are authorized to provide services on behalf of Iowa Title Guaranty

Professionals granted permission by their designated organization would be required to do the following.

- Be a registered user of the ILR Search application
- Complete a training webinar hosted by ILR and a partner organization (like the Law Enforcement Academy or a similar entity)
- Sign a agreement to maintain the confidentiality of any individual record flagged as “shielded” by ILR

A professional who is not in one of the designated occupations (such as a bank loan officer or underwriter) may be temporarily authorized to view shielded records with the written permission of the applicant (shielded person(s)).

Example: Iowa Land Records User Management: Permission to access shielded information will be added to the ILR User Management system. Professionals would be required to be registered Iowa Land Records search users and acknowledge their ethical responsibilities and to maintain the confidentiality of information accessed through the system.

A setting, administered by the ILR team, would be added to records indicating whether records are shielded from search results and image viewing unless viewed by a user with permission.

Applicable Systems: The requirement for limiting public access to shielded information would apply to electronic documents or web pages which contain information about a Qualified Individual through a public internet site including public or private websites hosted by a county or land records management systems working in service to an Iowa county or counties. This would include Iowa Land Records and other land record information websites which provide access to county information with the permission of the county.

Option: Add a pop-up message when any “protected” document is viewed by an authorized user.

Option: Require MFA for permissioned users

DRAFT

1. Section 331.606A (1) is amended by inserting the following new definitions

d. "Information Shielding" means restricting access to a document or information associated with a Qualified Individual which is posted through an internet site. The purpose of information shielding is to protect the safety of a qualified individual.

e. "Qualified Individual" means one of the following.

- i. a peace officer, as defined in section 801.4, civilian employee of a law enforcement agency, or state or federal judicial officer or state or federal prosecutor
- ii. a former peace officer, as defined in section 801.4, or a former civilian employee of a law enforcement agency who presents evidence that there is a compelling safety interest
- iii. victims of domestic violence or abuse confirmed by an official Iowa court officer

Notwithstanding the meanings described in this section, a person holding or seeking public office is not a qualified individual.

f. "Eligible Professionals" means one of the following.

- i. A participating attorney, abstractor, closer or associated personnel who are authorized to provide services on behalf of Iowa Title Guaranty
- ii. A licensed member of the Iowa Bar

2. Section 331.606A is amended by inserting the following new numbered paragraph.

7. Upon request by a Qualified Individual as defined in this section, a county official shall implement an information shielding process to restrict public access to electronic documents or web pages which contain information about the Qualified Individual through a public county internet site including public or private websites hosted by land records management systems in service to Iowa counties.

County officials shall implement and maintain a process to facilitate requests for information shielding. Information shielding processes may include provisions which would permit Eligible Professionals to access shielded information.

Access to shielded information may also be granted to other professionals with the written permission of the qualified individual.

Eligible Professionals and others who are granted access to shielded information must agree to maintain the confidentiality of the qualified individual and receive training with respect to the handling of confidential information.

A fee shall not be charged to a person requesting information shielding participation.

Purpose: Beginning in 2012 Iowa Land Records and the Schneider Corporation (Beacon) had a reciprocal agreement that permitted Beacon users to access copies of conveyance documents if they also had an Iowa Land Records (ILR) account. The systems were connected through an application programming interface (API) and its functions were rudimentary and not fully developed. The connection between systems was severed when ILR implemented an updated land record search application in 2023.

It is proposed that an updated and enhanced integration be implemented that would enable a user to search the Beacon system and then link directly to (and view) the applicable conveyance document from the Iowa Land Records system. Conversely, a user could search and find a conveyance document for a property through the Iowa Land Records search application and then be able to link directly to (and view) the applicable property information from the Beacon system. This reciprocal system access would provide a substantial benefit to property information searchers.

There are three salient elements of an integration between these and other geographic information systems.

1. Authorization to access the function of reciprocal data access.
2. The shared data elements (the relational data) used to tie the data in the two systems together.
3. The application programming interface (API) used to manage the access and display of information within the two systems.

ACCESS AUTHORIZATION

Iowa Land Records has established an updated organization and user management system, a central authentication system which in some cases requires multi-factor authentication. Registration with Iowa Land Records for either E-Submission or Search services requires organizations and users to apply for permission to access the systems. Applications are reviewed to verify authenticity. Organizations are required to manage their own users, and users are required to follow Terms of Service rules to ensure that services are appropriately accessed and used. Unlike previous applications, there is no self-registration system. These user management policies and procedures provide a higher degree of confidence that users are authentic and will use ILR services appropriately and responsibly.

It is proposed that access to these reciprocal services be provided through the ILR user management system. When an authorized user of the ILR search application logs in to the ILR central authentication system, the function of linking to Beacon property information associated with a recorded conveyance document would be enabled.

It is also proposed that any user desiring to use these reciprocal services through the Beacon system would log in to Beacon through the ILR central authentication system. Beacon would provide users with the ability to log into their system in a manner similar to log in options which are currently provided to Google and ArcGIS users. See Illustration 1. Once logged in to Beacon using this method, a user would be able to search Iowa properties through the Beacon system, and from a property summary page they would be able to link to the appropriate conveyance documents (deeds, contracts) from the Iowa Land Records System.



Log In

Account Log In

A login form titled "Account Log In". It contains an "Email" field with the placeholder "user@email.com", a "Password" field, a "Remember me" checkbox, and a "Forgot your password?" link. A blue "Log in" button is at the bottom of the form. Below the form is a separator "— or —" and two social login buttons: "Sign in with ArcGIS Online" and "Sign in with Google".

Email

user@email.com

Password

☐ Remember me [Forgot your password?](#)

Log in

— or —

Sign in with ArcGIS Online

Sign in with Google

Illustration 1 – Beacon Login Options

RELATIONAL DATA

Iowa Land Records is moving toward the use of parcel identification numbers as one of the methods for searching property information. Nationally, the Property Records Industry Association (PRIA) has documented that the parcel identification number (PIN) is a key data point for integration among different property information systems (geographic information systems, and systems managed by other offices including auditors and assessors). See: Parcel Identification Numbers – Frequently Asked Questions – PRIA – June 21, 2023; and GIS and Land Records FAQs – PRIA – April, 2024; and GIS and Land Records Integration – PRIA – May, 2021.

It is proposed that parcel identification numbers be used as the key relational data point that would be used to tie property information together. This approach would not only be useful for this particular initiative, but it could also open the door for similar integrations with other systems in the future.

It should be noted that Iowa counties do not have a consistent standard for formatting the content of parcel identification numbers. It will be necessary to reconcile these differences. In some respects, integration efforts may vary from county to county.

APPLICATION PROGRAMMING INTERFACE (API)

Iowa Land Records and Beacon propose to collaborate on the development of an API which will be used to facilitate communication between systems. This will manage the operation of some of the core functions such as the following.

- Making a call from Beacon to ILR to access information in the appropriate property record through the ILR search application. From this point the user could be able to examine the recording information details and open the conveyance document image.
- Making a call from ILR to Beacon to open the access information from the property summary page through the Beacon application. From this point the user could be able to access the posted photos, drawings, valuation and tax information and more.

PROJECT OUTLINE

The Beacon system provides access to property information for more than 85 jurisdictions in the State of Iowa. Implementation will need to be conducted on a county-by-county basis, and it will take time. In part this will be due to the variance in PIN formats and the need to reconcile the data for each individual county.

The project plan includes five primary sets of activity.

- Creating the integrated user login structure
- Developing the APIs which would be used by both systems to manage the exchange of information
- Creating a process to populate and align the parcel identification numbers in each system
- Defining the user experience in both systems
- Systematically implement the integration in each applicable county or jurisdiction

Login Structure

Schneider Corporation will develop a login interface in the Beacon application. A new button will be displayed on the account login page which reads "Sign in with Iowa Land Records" accompanied by the ILR logo. Selection of the button will open a page inviting the user to log in to the Iowa Land Records central authentication system. A login form will be presented, asking for a username and password. These form fields will be accompanied by a button to initiate the Login process.

Some users, if they have ILR administrative or payment privileges, will be asked to authenticate using multi-factor authentication.

Authentication of a Beacon user through the ILR system grants the following privileges to the user.

1. Authorization to perform a Local government GIS for the web search.
[Note: describe here any Beacon search privileges beyond the privileges granted to a user who is not logged in, if applicable.]
2. Authorization to purchase a subscription for access to any information which may be restricted by a specific county.
3. Authorization to directly link to and view a conveyance document and applicable document index information from the Iowa Land Records system which is associated with a specific Iowa property or parcel report displayed on the Beacon system.

Note: The system would not be designed to allow a user to switch back and forth between the ILR and Beacon systems in the same browser session. Want to view ILR information while searching in Beacon? Yes. Want to view Beacon information while searching ILR? Yes. Want to search in both systems interchangeably? No. Only one user session permitted per login.

Links to the respective websites will be provided so that a user can switch between systems, but only one of the systems will be the primary search application at any given time. Any session parameters will be determined by the primary system being used. For example, an Iowa Land Records user will be timed out after 20 minutes of inactivity.

API Development

The API(s) developed by Schneider and the Electronic Services System (ESS) would primarily be intended to grant authorized users with access to the online information systems known as Beacon (Schneider) and Iowa Land Records (ESS).

It is proposed that the integration between systems be developed on the OAuth 2.0 platform. See: <https://oauth.net/2/>. Generally, this would permit Beacon to display individual conveyance document images and selected other recording information on its web pages to authenticated ESS users. In turn, ESS and Iowa Land Records would be permitted to display selected data from Beacon property pages on its website. Examples of the expected workflow follow.

- **Beacon User Login Through ESS CAS.** Users who choose to log in via the Beacon website would be presented with a button labeled “Sign in with Iowa Land Records.” A form would be displayed asking the user to enter their ESS CAS username and password. Upon entering the required information, and then selecting “Sign In”, the Beacon system would make a call to the ESS central authentication system (CAS) to check the user’s credentials. If the user is registered as a standard search user with Iowa Land Records, the ILR system would return a reply indicating that the user was authorized, and the Beacon system would complete the login and provide access to the Beacon website. The Beacon system would be permitted to display to the user specified document images and index information based on the county and parcel number associated with the property.

- If the user logging in to Beacon is registered as an administrative or accounting user with Iowa Land Records, the ILR system would return a reply indicating that an authentication code would be required to complete the login.

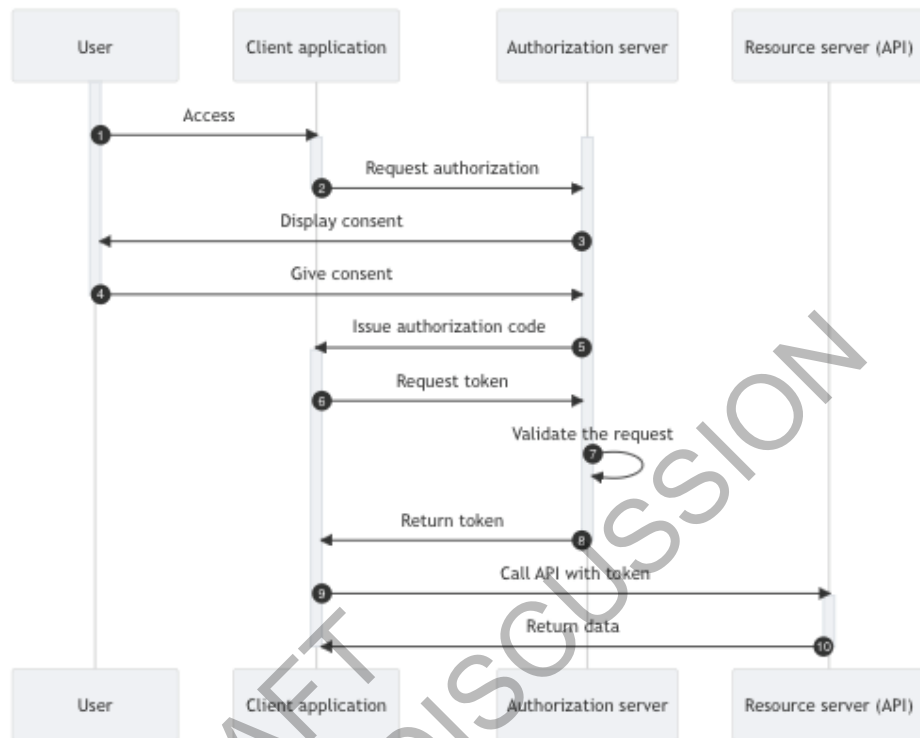


Illustration of OAuth 2.0 Authentication

- **Iowa Land Records User Login Through ESS CAS.** Users who choose to log in to Iowa Land Records would be required to enter a username and password. Upon entering the required information, and then selecting “Sign In”, the Iowa Land Records central authenticational system (CAS) would be checked. If the user is registered, access would be granted, permitting the user to search the ILR database. When locating a property record, ILR would be permitted to access and display property information from the Beacon system based on the county and parcel number associated with the property. Note: Further review of processes for accessing any protected Beacon data is needed.
- **Beacon User Login Through Beacon Authentication.** Users who choose to log in to Beacon through the native Beacon login, or the ArcGIS or Google login processes would not be granted access to Iowa Land Records protected data. If a user were to request the display of ILR data, it is presumed that the user would be prompted to login to ESS CAS.

Data Population and Alignment

It is anticipated that Schneider and ESS will use the parcel identification number as a common data element for aligning property information in their respective systems. Further, it is likely that a parcel identification number may be associated with one or more conveyance or other documents. Conversely, while multiple ILR documents may reference the same parcel identification number (PIN), it is expected that they would all point to the same (current) property or parcel summary page.

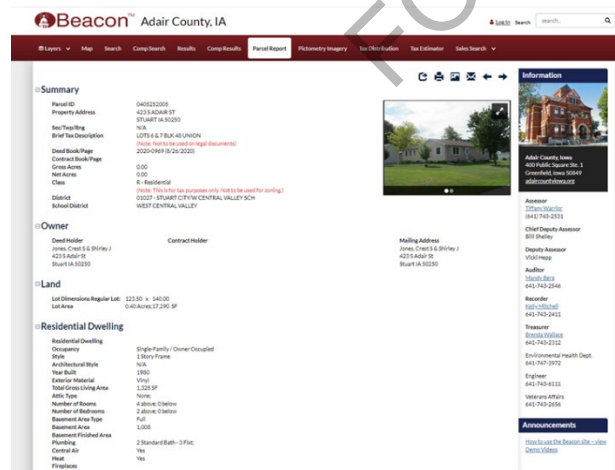
Historically, Beacon has utilized recording reference information to identify documents in Iowa Land Records. However, all Iowa county recorders have not consistently indexed parcel identification number information.

Beacon and Iowa Land Records contemplate a process to compare their respective records and verify that the recording and parcel identification references are aligned, accurate and formatted such that the information can be reliably used as relational data elements. As needed, Beacon and Iowa Land Records will share information for the purposes of filling gaps in data. For example, conveyance documents in Iowa Land Records which do not have parcel identification information will need to have PIN information added to the appropriate records in the ILR database. ESS and ILR are hopeful that Schneider Corporation can assist in filling these gaps.

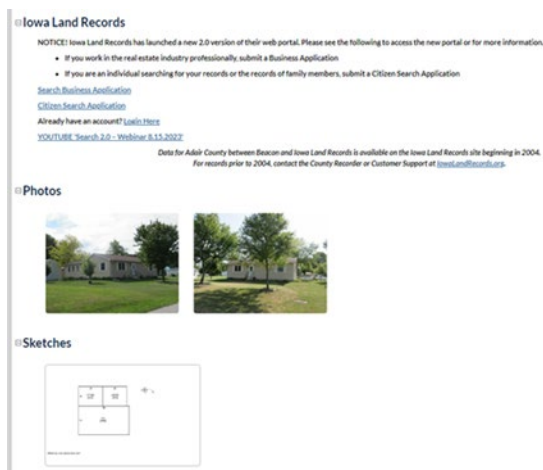
Expected User Experiences

User Searches Beacon. Users who choose to search for property information on the Beacon website would be presented with a view of a standard Parcel Report. See Illustrations. If the user has logged in through ESS CAS, they might be presented with information associated with multiple documents associated with the parcel. The Beacon system would determine how this information will be displayed. [To be fleshed out by Beacon.]

A possible user experience might be to display information about each document such as document type and date of recording and an image icon which could initiate the display of the document image. [To be fleshed out by Beacon.]



Beacon Parcel Report



Beacon Parcel Report cont.

Iowa Land Records

NOTICE! Iowa Land Records has launched a new 2.0 version of their web portal. Please see the following to access the new portal or for more information.

- If you work in the real estate industry professionally, submit a Business Application
- If you are an individual searching for your records or the records of family members, submit a Citizen Search Application

[Search Business Application](#)

[Citizen Search Application](#)

Already have an account? [Login Here](#)

[YOUTUBE Search 2.0 - Webinar 8.15.2022](#)

Links to Iowa Land Records

User Searches Iowa Land Records. Users who choose to search for property information using the Iowa Land Records website would be presented with initial search results based on the type of search performed (name, reference number, location, document type, county name, or advanced). Using OAuth 2.0 protocols, Iowa Land Records would display selected information from the associated Beacon Parcel Report. This would likely be presented as a part of the Index Details page (see illustration), although some information could be displayed on a separate page to be determined.

IOWA LAND RECORDS
 Start a New Search
 Name Search
 Reference Search
 Location Search
 Document Type Search
 County Search
 Advanced Search
 Saved Searches
 Phil Search
 Created On: 09/09/2024
 See all

Search ESS Admin Profile Logout
 Document View ← Back
 Summary Information [Download PDF](#)
 Document Type: Warranty Deed
 Recorded Date: 09/17/2024 01:37 PM
 County: Adair
 Reference Number: 2024-1045
 Book and Page:
 Instrument Number:

Grantors		Grantees	
Name	Party Type	Name	Party Type
PAULEY CRAIG E	Person	PAULEY CRAIG E	Person
		PAULEY CRAIG E	Person

 Associated Documents
 No associated documents were found.
 Properties
 Parcel Id:
 01-0410200003
 County Location Abbreviation: Parcel: 01-0410200003
 Legal Description: Parcel: 01-0410200003

Index Details

Browser or Session Configuration. Because information is being accessed using the OAuth 2.0 protocols, both Beacon and Iowa Land Records will be displaying information in their respective web pages. There would be no embedded webpages or pop-ups. Website session parameters would be solely controlled by the respective systems. ILR CAS users are automatically logged out after 20 minutes of inactivity, and that would continue to be applicable. Users of the Beacon system would follow those standards. As development plans are prepared, the Beacon and ILR teams are expected to review policies concerning any time limits associated with OAuth 2.0 tokens.

Terms of Service. Beacon and Iowa each publish their own Terms of Service and privacy policies. Those policies will continue to be applicable. For example, Iowa Land Records limits organization users to 120 image views per day, and individual users are limited to 10 image views per day. Those requirements would continue to be enforced, even if a user is viewing images through the Beacon website.

Implementation

This project is a voluntary collaborative effort of ESS and Schneider Corporation. It is anticipated that an updated written agreement will be developed to establish more detailed terms of the collaboration. Such an agreement might address topics which include but are not limited to the following.

- The general terms associated with the operation of the OAuth 2.0 API and associated arrangements.
- The obligation of the organizations to be responsible for the cost of changes to their respective systems.
- The possible shared responsibilities for the development of the OAuth 2.0 API.
- The specification of the data which may be shared and the permissions for the use of shared data. The shared use of parcel identification information will be a key to success.
- Expectations for mutual attribution for the collaboration and any information shared by the parties
- Other details that should be reviewed and documented to ensure the success of the project.

Data of Interest to Iowa Land Records

Parcel identification numbers are of greatest interest as this will tie the information together and could be enabled as a searchable element in ILR. Other information of interest which could be displayed for property documents includes the street address, property classification (residential, commercial, agricultural), most recent sale date, most recent sale amount, assessed, taxable and taxes due value (most recent year?), or brief tax description(?). [Subject to discussion.]

Data of Interest to Beacon

Images of conveyance documents is believed to be at the top of the wish list. Data elements might include grantor names, parsed location information, and associated references. [To be fleshed out by Beacon.]

Pilot Counties

It is anticipated that as the login structure and API development is undertaken, work may begin on the alignment of data to ensure that the calls made between the respective systems are successful. This includes the alignment of parcel identification numbers. Several pilot counties may be selected to explore the feasibility of establishing required PIN formats. The selection of pilot counties may be influenced by several factors including the following:

Population: Smaller population counties may be selected to prove concepts due to smaller sized data sets. It will be easier to implement a project with thousands of records when compared with jurisdictions that have hundreds of thousands of records. A larger population county may be better positioned to demonstrate the benefits of the project to the real estate industry.

Service Provider Experience. Iowa county recorders are primarily served by one of four technology service providers who offer software for land record management systems. There may be benefits to engaging each of these service providers in a pilot project to identify and resolve any issues that may be specific to their respective systems. This could then ease subsequent implementation in the other counties served by those providers.

Geographic Representation. The ninety-nine counties are divided into six geographic districts. Conducting a pilot program in each of the districts may also prove to be helpful in training and acclimating counties and their service providers in the implementation of new processes that may be required.

Engaging Early Adopters. Iowa county recorders do not have a long history of indexing parcel identification numbers as a part of recording information. There are about a half-dozen counties which are actively indexing PIN information, and in a few cases the format matches the Beacon format – enabling the search and retrieval of information from both the Beacon and the ILR systems. Including counties with compatible data will accelerate efforts to prove the concept and encourage other jurisdictions to follow suit.

Below is a table of Iowa counties representing the different geographic districts, service providers and population sizes. The PIN format displayed in the Beacon system is noted, and where present the PIN format found in the Iowa Land Records system is also displayed. Participation in a pilot project by a county would be voluntary. No counties have been contacted or selected at this time.

County	Service Provider	District	Population	Beacon?	PIN Format	ILR PIN	Notes
Grundy	Tyler	1	12336	Y	861730401018	N	
Story	Tyler	1	98106	Y	1106435485	N	Started Indexing PIN 1/24, not yet transferred to ILR
Worth	Tyler	2	7450	Y	03-21-400-001	321400001	Beacon requires a leading zero
Wright	Solutions	2	12978	Y	1036200004	N	
Sac	Tyler	3	9829	Y	810210100006	N	
Woodbury	Tyler	3	105102	Y	864227182012	864227182012	Successful Beacon search; w and d but not q
Adair	Tyler	4	7439	Y	932452014	01-0932452014	Successful Beacon search without prefix 01-
Audubon	Fidlar	4	5657	Y	05-11-23-440-450	N	
Cass	Cott	4	13158	Y	190001011003002	N	
Davis	Tyler	5	9066	Y	11071230	N	
Louisa	Tyler	5	10891	Y	1230166004	12-30-166-004	Successful Beacon search without hyphens
Delaware	Solutions	6	17508	Y	320330001150	N	
Dubuque	Cott	6	98687	Y	1026481013	1026481013	Successful Beacon search
Johnson	Cott	6	151833	Y	1017302033	1017302033	Successful Beacon search

Note: w=warranty deed, d=deed, q=quit claim deed

Information Shielding

The State of Iowa currently has a policy to allow for the redaction of certain information from the public record in order to protect certain classes of public servants including law enforcement and judicial officers. It is possible that this policy may be expanded to become an information shielding program which will require the restriction of access to information about qualified program participants. If this expanded policy is adopted, Iowa Land Records will be required to shield records, and so will other county offices (and their service providers). This possibility is noted here to ensure that any shielding activities are coordinated between Iowa Land Records and its program partners.

External Data

As noted in the discussion of parcel identification numbers ESS and ILR are exploring an integration with Schneider Corporation (Beacon) about the possibility of importing PIN information into the ILR database for selected counties. But there is other data in the Beacon system that may need to be mapped to the ILR system. The following is a brief description of each.

Generally, decisions about storing information from the Beacon system in Iowa Land Records have not been made, and in most cases, there may be no need to archive Beacon data in ILR systems. The information below is only intended for reference as the planning process for the integration continues.

Property Street Address

The Beacon system contains property address information including the street address, city, state and zip code. The abbreviated location information (section, township, range, quarter section or lot, block, subdivision) is also displayed but would not need to be replicated in Iowa Land Records. There appears to be a distinction made between the property address and the owner's address. Property address seems to be the relevant data element for display in Iowa Land Records.

If needed the ILR schema includes data elements related to property address under Parsed Street Address. Data elements include but are not limited to houseNumber, ruralRoute, streetName,

The ILR schema also includes the following data elements under Property: city, county, streetaddress and streetaddress2, state and postal code

Property Classification

The Beacon system contains property classification information about the primary nature or use for the property, such as residential, commercial, agricultural, etc.. Comparable data elements are not observed in the Iowa Land Records schema.

Most Recent Sale Date and Sale Amount

For some counties and properties, the Beacon system includes information about the most recent date the property was sold, and the amount of the sale. The date of the sale would generally be associated with the execution of a deed or a contract, and the sale amount would generally be aligned with the sale consideration amount in the deed or contract. This information has not been typically indexed by recorders and would be of interest to Iowa Land Records users.

Comparable data elements in the Iowa Land Records schema would be the amount, description and type under Consideration (SalePrice), and instrumentDate in the PRIA Document portion of the schema.

Most Recent Assessed Value

The Beacon system displays assessed valuations for properties including the current calendar year and several previous years. The valuation amounts are broken down into the categories of land, building and dwelling. For Iowa Land Records, the most relevant piece of valuation information would simply be the net assessed value for the most recent calendar year. The

display would be the Year and the Net Assessed Value. Comparable data elements are not observed in the Iowa Land Records schema.

Most Recent Taxable Value

The Beacon system displays taxable valuations for properties including the prior calendar year and several other previous years. The valuation amounts are broken down into the categories of land, building and dwelling and specifies the various exemptions and credits. For Iowa Land Records, the most relevant piece of valuation information would simply be the net taxable value for the most recent calendar year. The display would be the Year and the Net Taxable Value. Comparable data elements are not observed in the Iowa Land Records schema.

Most Recent Taxes Due Value

The Beacon system displays recent “taxes due” for properties including the prior calendar year and several other previous years. The tax amount shows the gross taxes due and the effect of various credits. For Iowa Land Records, the most relevant piece of tax information would simply be the net taxes due for the most recent calendar year. The display would be the Year and the Net Taxes Due. Comparable data elements are not observed in the Iowa Land Records schema.

Brief Tax Description

The Beacon system displays a “Brief Tax Description” in the Summary portion of a Parcel Report for a property. This is like what we might describe as the “County Location Abbreviation” in View Index Data displayed in the ILR Search application. Here is an example of a Beacon Brief Tax Description for a property: 12 69 13 E 1/4 SW NE . Here is how the abbreviation appears in the ILR Search application: County Location Abbreviation: 69 13 12 . There may be some benefit in displaying the information stacked in the View Index Data with the label Beacon Tax Description.

Generally, the purpose of displaying information from the Beacon results is to provide the user with supplemental information not related directly to the recording, and to guide users to the Beacon system for more details, and vice versa.

Project Purpose. To assemble unrecorded Iowa surveys and railroad strip maps dating back to 1990, to digitize and preserve them in PDF format, and to document information necessary to create a searchable database of the historic records. Qualified unrecorded surveys or railroad drawings must be signed and dated by a professional land surveyor. Once digitized and indexed, load the records into a searchable database in collaboration with Iowa Land Records.

Task 1 – Digitization. Retrieve or borrow the records in their current form (paper or electronic). Paper records would be scanned and digitized in PDF format with a resolution between 300 and 600 DPI, sufficient to produce a high quality and legible image. File sizes should be no greater than 1 MB and generally in the range of 100-300 KB.

It is anticipated that digitization would be performed voluntarily by surveyors and uploaded to a shared drive hosted by Iowa Land Records and shared with the Society of Land Surveyors of Iowa (SLSI).

Task 2 – File Names. Digitized Images, when created, would be expected to follow a standard naming convention for the electronic document files. It is suggested that the naming convention be a name (such as a surveyor name and a five digit sequential number). To the extent practicable, the files should follow a chronological order with the oldest record having the first sequence number. The name would not necessarily be a full name, but rather a recognizable but unique surname or primary company name.

Task 3 – Basic Indexing. For each set of digitized images, an index file should be created with basic information about each document. This should be a xlsx or csv file which contains the following information about each file (PDF).

File Name – the name assigned to each digitized image in Task 2

County Name

Surveyor First Name

Surveyor Last Name

Surveyor/Engineering Firm Company Name

Requesting Company Name: (if applicable) (Railroad Name?)

Document Type: (Survey and Plats OR Railroad Map)

Date of Survey: (typically, date of surveyors signature)

Section (numeric only?)

Township (numeric only?)

Range (numeric only?)

Lot

Block

Subdivision Name (no abbreviation)

City/Town/County Name (no abbreviation)

Parcel Identification Number (if present)

Additional Parcel Identifier (if present)

Task 4 – Import Into ILR Database.

Task 5 – Determine Design and Content of Indicia.

Create “Not Recorded” indicia or watermark and affix indicia to image (First Page or all pages?)

Task 6 – Define Search Method. Determine and create method of searching for unrecorded surveys or railroad strips.

Workflow Example 1 – Data Images incorporated with ILR land record database and a data element is created to designate that the record is “unrecorded”

User logs into Search

User accesses any one of the search options and performs a search

Unrecorded Symbol Displayed

If an unrecorded survey or railroad strip appears in the results, the initial search results will show a symbol in the area with other symbols (show index, download pdf, report issue and associated reference) indicating that it is not recorded.

Unrecorded Indicia Displayed

The image will display an indicia indicating that it is unrecorded.

Workflow Example 2 – Data Images into a separate “unrecorded” ILR land record database and parallel search tools are created.

User logs into Search

User Interface modified to include a selection whether a user wishes to search recorded documents or unrecorded documents. Recorded documents are selected by default

User selects the unrecorded documents option (probably a radio button)

Search tools all operate the same as for recorded documents

User accesses any one of the search options and performs a search

Unrecorded Message is Displayed

A message appears adjacent to the “showing page” information which states something like “Notice: Records Displayed Here Not Recorded”

Unrecorded Indicia Displayed

The image will display an indicia indicating that it is unrecorded.

February 15, 2024

To: ESS Coordinating Committee

From: Phil Dunshee, ILR Project Manager

Re: ILR Data Completeness and Normalization Initiative

When development work on the updated ILR search application started two summers ago, we examined the frequency of search types to make sure we were putting emphasis on the types that were most frequently used. Names searches were at the top of this list. Location searches were the least used. One of the likely reasons is that searching based on location (legal description information) is more difficult due to the variability of indexing practices among counties. A significant amount of location information is unparsed and is often in a freeform text description field. For this reason, we looked to the future and built the location search on the “best practice” of using parsed location information (section, township, range, quarter section (un-platted) and lot, block, subdivision name and city/town (platted)). For the same reasons we did not include a search using parcel identification number at this time (it can be added later when it is more useful).

As we have moved forward with the new search application and as steps have been taken to retire the legacy application, we have observed that some users learned how to use the summary text description field to search for records in counties with little, if any, parsed location information to search. In the absence of a method to enable a successful parsed location search in some counties, we have permitted some organizations, including the Department of Transportation, to temporarily continue to use the legacy search application. But we need to fully retire the legacy application.

We believe the best approach to resolving this issue is to modify the ILR database wherever possible to “fill in” the missing parsed location information. There appear to be two feasible approaches to doing this. The first is to observe the freeform text location information in applicable counties and to extract the parsed information and place it in the correct data elements in the ILR system. A second approach would be to work with partner organizations who have already extracted the information for their own purposes, and, with their permission, copy and insert it into the ILR database. Either (or both) approaches would make parsed location searches possible. The document summarizing possible ICRA-ESS Modernization Initiatives includes the following project description.

“Normalize” County Location and PIN Information; Iowa Land Records provides access to more than 23 million records. However, the formatting of certain data may not be consistent across all counties, making searching more difficult. For example, in prior years counties may not have parsed location information such as section, township and range into separate fields. A special project to fill in and “normalize” the electronically indexed data is proposed. A primary focus would be on the following data elements: section, township, range, quarter section, and lot, block, subdivision, city/town and the applicable parcel identification number(s).

“Normalization” can also include changes to the format of numeric data to create more consistency, such as establishing common rules for the use of leading zeros (or not), and document type mapping. All of these changes would be made in the ESS/ILR database – NOT local indexing systems.

Making these changes is a substantive, nontrivial project and therefore it is included in the list of possible “Modernization” initiatives. More resources will be needed to make it happen. The following is a description of the primary steps for implementation.

Data Analysis

The indexing data for each county in the ILR system would be analyzed to identify missing data or data in a format that deviates from established standards. This review would be coordinated with each county recorder and their local LRMS service provider.

The data review would also examine any data the county may have not yet transferred to ILR for whatever reason. This might include parcel identification numbers, and other requested data elements, or perhaps index data and images from prior years.

Data Review and Modification

Where present, either in the county system or within Iowa Land Records, unparsed data or missing county data would be isolated, extracted, parsed or re-formatted – whatever was necessary – to make it complete and formatted to established standards. At this stage, no changes to the ILR database have yet been made. The “normalized” data would be reviewed with the county recorder and their local LRMS service provider.

Data Insertion

Once reviewed and verified, the data would be inserted into the appropriate elements of the ILR system. Test searches would be performed to verify that systems were working, and that data was being displayed correctly.

Option for County Updates

Given the investment that would have been made in the “normalization” and parsing of the data elements, it seems appropriate to provide each county with the option to insert the updated information into their local indexing systems. We envision this being a function of the updated County Upload API (CUAPI) which we hope to move into production in 2025. Generally, if authorized or directed by the county, the local LRMS service provider would make a “call” to receive the updated data from ILR. In doing so that county indexing data could also be enhanced. This would be OPTIONAL for the county.

Time Line

Updates to the CUAPI to enable the new transfer functions could be completed by December, 2024 and the process of working with each county would require an effort that would extend from July, 2025 through December, 2026.

Updated County Error Correction Process

In the normal course of business, county recorders may identify indexing errors, e.g., spelling, that need to be corrected. County recorders sometimes append new information to an older electronic index record, such as an associated reference to a related and recently recorded document. It is suggested that these updates be received by ILR through the CUAPI, and then placed in a queue for review by a member of the ILR customer support team. Routine updates would be quickly approved, but the updated process would provide a “failsafe” against erroneous or unintentional changes in data. This control would be applied well after the normal time required for a county to complete indexing, such as 30 days following the recording date.

Priority ILR Steps

While a systematic county by county process will take time and resources to implement, in the near term the ILR team would focus on counties with limited parsed location information. This action is needed to facilitate needed location searches that will allow for the full retirement of the legacy search application. Additionally, it would be appropriate to update ESS policies – primarily with respect to Chapter 2 of the ESS Policies and Procedures. These topics will be addressed in upcoming meetings of the ESS Standards Subcommittee.

Requested Action: No action is requested. Comments and guidance from the ESS Coordinating Committee are desired at this time.

The Electronic Services System and Iowa Land Records have developed a new Application Programming Interface (API) to facilitate the transfer of recorded document index information and images from county systems to the Iowa Land Records database. The published target date for implementation of the new County Upload API (CUAPI) is March 31, 2025.

The purpose of the new CUAPI is to move away from an outdated local client messenger (LCM) system, simplify the API using JSON, provide more control to local service providers in the handling of messages and data transfers, and to provide a current and reliable structure for exchanging information.

The implementation of the new CUAPI also provides an opportunity to clarify the business requirements for the information upload process including requirements to maintain the integrity of data after it has been transferred to ILR, to define the data elements that are required to be transferred, and to establish procedures for correcting data errors and appending new data to a record. The following is a description of these requirements.

County Upload Timeline

Current policy, Section 4.6 Time of Transfer – Forward File Records, provides that each county shall transfer to the county land record information system a “forward file” document not later than three business days after the time of recording. The policy also requires that, if feasible, a scheduled automatic transfer of the records be enabled. Only the transfer of a minimal amount of recording information (the document image, recording reference number (s), date and time of recording, document type and one or more party names) is expected. This minimal amount of information is required so that Iowa Land Records can submit the recorded document for PII review and redaction processing as soon as possible. As a practical matter, it is common for some counties to take longer to proof a document and the associated indexing, and then to upload the updated information at a later point in time. The current process has no time limit.

Going forward, to protect the integrity of the record and to prevent either unintentional or malicious changes or deletions to the ILR database base, it is proposed that several safeguards be implemented.

Document Complete Status Within 30 Calendar Days

Iowa counties should be provided a reasonable period to complete the indexing of a record and to perform any proofing procedures to ensure completeness and quality of both data and the images. It is proposed that recorders be required to complete data entry and the proofing of a document’s indexing information within thirty calendar days following the recording date of the document. At the end of the thirty-day period, the index information would be “locked” and editing would be restricted. A county wishing to edit a recording after the thirty-day period would be asked to communicate with the ILR customer service team concerning any need to update or correct index information. Once reviewed, an ILR admin user would flip a flag at <https://iowalandrecords.org/essadmin/search/documents> (Search Management : Document Admin) to allow an Index Update.

Workflow. An attempt to update a record after the 30-day period should result in a failure message returned through the API. Additionally, an email should be generated to the county recorder (or an alias recorder support email), indicating that an attempt to update a record(s) failed, with instructions to contact support@clris.com. A similar message would be generated for the support team – possibly through the Search Management : Document Issues interface.

For individual records, a possible workflow is to have the recorder report a document error (or a new option called Update Request) through the search “Report Issue With Document” function. If multiple documents have an indexing error, recorders would be instructed to provide the ILR support team with a list noting the document identifier, date of recording, and the nature of the error. Action to review and approve or deny requests could be coordinated through the existing Search Management: Document Issues workflow

An enhanced version of this procedure might be to provide method for the recorder to submit a edit or correction and have the ILR system store it pending review and acceptance by a member of the ILR support team. Once approved the change would be made in the ILR system, and no further action would be required by the county or recorder. If there were questions, a member of the ILR support team would contact the county recorder. review and approve or deny requests within the Search Management: Document Issues workflow.

An action to “unlock” a record for editing should expire within a short period of time. The record should not “lock” automatically after an update is made to allow for follow-up error correction. There should be no restriction on future “unlock” actions on a particular document, but the expectation is that a corrected record should never need to be touched again.

Further design planning is needed to determine the final workflow for development.

Note: ILR has for many years followed the practice of “locking” document images after they have completed the PII redaction process. Images may only be replaced with the permission of an ILR administrator, and policies have been adopted concerning the alteration or restamping of images. See ESS Policies and Procedures, Section 3.11.

Appending Indexing Information

Some index information may be created after the completion of the standard thirty-day indexing period. For this reason, appending certain indexing information to an existing document would be permitted. Examples of allowed additions to a document indexing record include the following.

Associated References. Iowa Land Records policy requires that associated references be indexed as a Bilateral Reference. This means that when certain documents are recorded, an associated reference to the most recent antecedent must be added to the index of the newly recorded document. This can be done during the thirty-day indexing period, because it is a recently recorded document. A reference to the newly recorded document must also be added to the antecedent document that was likely recorded in an earlier time frame, and beyond the thirty-day indexing period. The following associated reference cases would be applicable.

- Associated reference to a recently recorded deed, appended to the previous deed index
- Associated reference to a mortgage release, appended to the previous mortgage index
- Associated reference to a tax lien release, appended to the associated tax lien index

- Associated reference to a corrective or re-recorded document, appended to the original document index, if recorded more than thirty calendar days apart
- Associated reference to a survey document, appended to a previous survey document index, if recorded more than thirty calendar days apart - also applicable to a corner certificate, monument preservation certificate, or easement

This would not be applicable to associated but contemporaneously recorded documents such as a deed and a groundwater hazard statement. In this case both associated references should be indexed within the thirty-day period.

Newly Created Parcel Identification Numbers. Newly created parcel numbers may not always be known to the recorder at the time of recording. Generally, recorders should be notified of new parcel numbers, which should be added to the index of a recently recorded conveyance document, when applicable. However, in some cases notification may occur after the thirty-day indexing window. New parcel numbers and new additional parcel information may be appended to a record. Editing or deleting existing parcel identification numbers or additional parcel identifiers would not be permitted except with the permission of an ILR administrator. See the section on Existing Data Elements for more information.

No other condition is permitted for new information to be appended to an index. An edit or correction to an index must occur within the thirty-day period or be enabled by an ILR administrator.

DRAFT

County Upload Requirements and Related Policy

Reverse Data Upload

It is suggested that a method be created in the County Upload API which would enable a county, with ILR permission, to retrieve normalized data and insert it into their system. For example, if a county had not historically indexed parsed location information, they would be able to enhance their records by retrieving the information from ILR. Some type of review process with the county would likely be required, and controls on what data could be retrieved (such as date range, or specific document IDs) would be needed.

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