

# Electronic Services System Coordinating Committee

## Meeting Summary

August 2, 2006

### Participants

Sue Vande Kamp, Story County Recorder  
Joyce Jensen, Cass County Recorder  
Judy Cosgrove, Webster County Recorder  
Marty Minnick, Calhoun County Recorder  
Deb Winke, Allamakee County Recorder  
Dwight Reiland, Wright County Recorder  
Marilyn Dopheide, Carroll County Recorder  
Joan McCalmant, Linn County Recorder  
Melissa Bird, Keokuk County Deputy Recorder  
Kris Colby, Winnebago County Recorder  
Deb Roberts, Floyd County Recorder  
Tena Hinkel, Monona County Recorder

Arlene Kuehl, Osceola County Recorder  
Denise Meeves, Crawford County Recorder  
Pat Sass, Black Hawk County Recorder  
Janelle Schneider, Adair County Recorder  
Sue Meyer, Clayton County Recorder  
Liz Kenison, Worth County Recorder  
Karen, Schafer, Ringgold County Recorder  
Vicki McClintic, Mills County  
Steve Erickson, ABC Virtual  
Phil Dunshee, Enterprise MidAmerica  
Lisa Sinclair, Enterprise MidAmerica

### Welcome

Joyce Jensen called the meeting to order and asked participants to review the July Meeting Summary. Sue Vande Kamp made a motion to approve the ESS Coordinating Committee July 12<sup>th</sup> Meeting Summary and Marty Minnick seconded. The motion was approved.

### ESS Committee

#### **Status of Nominations**

An Executive Board Member has communicated with District 6 Members about the process of Coordinating Committee nominations. District Members are not able to specify length of terms or successors – this is an Executive Board function.

Several attempts were made to contact all of the Recorders representing the five largest counties in Iowa: Black Hawk, Johnson, Linn, Polk and Scott, in order to secure nominations for participation on the ESS Committee representing the largest Iowa counties. Based on their communication via e-mail, the group has nominated Joan McCalmant. On behalf of the group, Kim Painter, Johnson County Recorder, has submitted a written nomination to the Executive Board for their consideration.

### Project Financial Reports

#### **Fund 823 Accounts Payable**

The Fund 823 Accounts Payable was explained. Marilyn Dopheide made a motion to approve the Fund 823 Accounts Payable. Judy Cosgrove seconded the motion and it was approved.

#### **Fund 255 Accounts Payable**

The Fund 255 Accounts Payable was reviewed and discussed. The ABC Virtual invoice for fractional DS3 hosting covers bandwidth. Bandwidth charges were initially pre-paid but are now on a month-to-month billing. Marty Minnick moved to approve the Fund 255 Accounts Payable and Joan McCalmant seconded. The motion was approved.

### **Financial Reports**

Currently, the State Treasurer's Office sends periodic spreadsheet reports to the Project Office. Soon, the Treasurer's Office will begin sending monthly reports which will provide an

end of month balance for Fund 823 and Fund 255. Because this process has not yet started no additional financial reports submitted for review. New financial reports are expected to be ready for the September meeting.

## **ILR Application Development and Installation**

### **Mapping**

Committee Members reviewed the "Document Types Definition Table" and "E-Submission Mapping Table." Recorders will be asked to discuss how to map documents to the portal during the Summer School meetings.

The "Transfer of Real Estate to Surviving Spouse" was discussed. Currently, Recorders either map this document to "Affidavit of Death" or "Affidavit - Transfer." Committee Members decided that all Recorders should map the "Transfer of Real Estate to Surviving Spouse" to the document type "Affidavit of Transfer."

### **Operating Policies**

The "Proposed Operating Policies and Procedures" were explained to the Committee Members. This document will be discussed at length during the Summer School presentation by the Project Manager. It will be recommended to the Membership that an automatic upload capability be implemented in order for submitted documents to be posted in a timely fashion. Service providers have not raised any concerns with respect to the proposed "Operating Policies and Procedures."

The "Supplemental E-Submission Policies" document was discussed by Committee Members. The document is divided into three parts; "E-Submission Recently Recorded Document Availability," "Retrieval of Information from E-Submission by the Local Systems," and "Deleting E-Submission Data."

Joan McCalmant made a motion to approve the "Supplemental E-Submission Policies." Marilyn Dopheide seconded and the motion was approved.

### **Upload Report**

An upload report for the week of July 24<sup>th</sup> was shown to Participants. It appears that some counties are deliberately not sending images to the portal.

### **E-Submission**

An e-mail from Phil Dunshee, dated July 20<sup>th</sup>, and three Allamakee County examples were used during a discussion about "Assignment of Contract" documents and how they should be labeled when mapped to the E-Submission Service.

Sue Vande Kamp made a motion to map "Assignment of Contract" documents to the category "Contract & Contract Related" on the E-Submission Service. Marty Minnick seconded and the motion was approved.

It was noted the "Contract & Contract Related" document has not yet been enabled.

### **"User Guide / Warranty Deed"**

The "Warranty Deed" document will not be enabled on the E-Submission Service before September. Committee Members read the user guide for "Warranty Deed" and discussed pages 20-24, which cover Real Estate Transfer Tax, Declaration of Value and Groundwater Hazard Statements. The first label on page 20 was changed to "Contract" and Committee Members agreed that Eminent Domain should not be on the Real Estate Tax list.

With the two noted changes, the Committee Members gave their approval to the guide.

It was noted that a user guide will be written for every document before it is enabled.

The Project Office requested examples of book and page or document reference numbers for Warranty Deeds to be used in the guide. Also, examples of Quick Claim and other deeds were requested.

## **ILR Portal Linking**

### **Reciprocal Agreement**

The external linking is complete and will be fully implemented very soon. The Committee Members were shown a draft Reciprocal Agreement with Schneider Corporation which will be presented for approval at the September meeting. Linking will be possible with every county served by Schneider Corporation.

### **Version 2.05 Modifications**

A list of portal and e-submission items slated for the 2.05 release was reviewed and discussed. Lee County will be using the E-Submission Service very soon. An E-Submission Calendar on the General Tab is being implemented. The Recorders will need to work with their local service providers to decide how the "E-Submission Notification Flag" will be displayed on their systems.

### **Version 2.06 Modifications**

The goal is to complete the 2.06 release by the end of October. This release is seriously focused on the third party interface in relation to E-Submission and payment changes. Also, there will be modifications on how information is returned to the user after their submitted document is recorded.

### **Version 2.07 Modifications**

There is a lengthy list of items for the 2.07 release. Many of the items are cosmetic changes. This release may include the county home pages.

### **Closing**

The Project Manager announced that Customer Service Manager, Terri Selberg, has resigned and will be leaving her job in late August. Julie DenOuden has been hired to take her place and will train with Terri during the month of August.

The September Coordinating Committee Meeting is scheduled for September 13<sup>th</sup> at ISAC.

The Coordinating Committee Meeting was adjourned at 3:21 p.m.