



ePrepare®

ePREPARE Guide

<https://ep4.ingeo.com>

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The ePrepare login screen

Log in to ePrepare at <https://ep4.ingeo.com/> with your user name and password.

The screenshot shows the ePrepare login interface. On the left, a dark blue sidebar contains the CSC logo and an 'Announcements' section with several items, each with a 'May 19' date and a right-pointing arrow. Below the announcements is a 'Follow us on Twitter' button. The main content area is white and titled 'ePrepare' and 'SECURE SIGN IN'. It features a 'Username' field, a 'Password' field, and an orange 'SIGN IN' button. Below the sign-in fields are links for 'Can't access your account?' and 'Not using ePrepare yet?'. At the bottom, there is a 'Need help?' section with contact information and social media icons for Google Play and the App Store.

Callout boxes provide the following instructions:

- Login using your User name and Password**: Points to the Username and Password input fields.
- Click "SIGN IN"**: Points to the orange SIGN IN button.
- This area is where you will find announcements.**
 - Recording delays
 - County closures
 - New Counties
- Click on the arrow for previous announcements,**: Points to the right-pointing arrow in the announcement list.
- To contact submitter support.**: Points to the 'Need help?' contact information.

First Time Submitters

Our website has been tested compatible with **Internet Explorer**, **Chrome** and **Firefox**. Other internet browsers should work also, so feel free to try your favorite browser. However, please note that we presently only offer support for the three browsers specifically mentioned above.

If you use **Internet Explorer**, we offer enhanced document management features when using our optional CSC Imaging Utility. For more information about that utility, including features and installation instructions, control/click [here](#) to open the link.

The Work List Screen

The screenshot shows the Work List screen with the following callouts:

- Package
- Flagging a Package
- # of Documents in the package
- Jurisdiction (County or Town / State)
- Office (if applicable)
- Date last modified
- Work List
- Reports
- Utilities
- Help Videos
- Deleting a package
- Help
- Submit
- Check box for Selecting a Package

PACKAGE	DOCS	JURISDICTION	OFFICE	MODIFIED	STATUS
<input type="checkbox"/> ctest altalsoft	1	Tarrant County, TX	Default Office	May 14, 2015 (4:52 PM)	Ready
<input type="checkbox"/> slcs039485test Randall	0	Salt Lake County, UT	Default Office	May 14, 2015 (4:26 PM)	Empty
<input type="checkbox"/> ztampz	1	Davidson County, NC	Default Office	May 14, 2015 (4:08 PM)	Ready
<input type="checkbox"/> alam	1	Alamance, NC	Default Office	May 14, 2015 (3:09 PM)	Preparing
<input type="checkbox"/> rich23	1	Richland, SC	Default Office	May 14, 2015 (2:02 PM)	Pending - County Processing
<input type="checkbox"/> rich22	1	Richland, SC	Default Office	May 14, 2015 (2:02 PM)	Pending - County Processing
<input type="checkbox"/> dakot21	1	Dakota County MN	Default Office	May 14, 2015 (1:28 PM)	Ready - DRAFT
<input type="checkbox"/> mwdem04-594-5984	2	Harris County, TX	Default Office	May 14, 2015 (1:22 PM)	Ready - DRAFT
<input type="checkbox"/> testtesttesttest	0	Montgomery County, TX	Default Office	May 14, 2015 (1:11 PM)	Empty
<input type="checkbox"/> Kings NY	1	Kings, NY	Default Office	May 14, 2015 (1:10 PM)	Ready
<input type="checkbox"/> Image Testing_Landon	0	Tarrant County, TX	Default Office	May 14, 2015 (1:10 PM)	Empty
<input type="checkbox"/> Macomb, MI County only exempt deed	0	Macomb County, MI	Default Office	May 14, 2015 (12:05 PM)	Empty
<input type="checkbox"/> tb29	1	Tarrant County, TX	Default Office	May 14, 2015 (11:47 AM)	Ready
<input type="checkbox"/> tb27	1	Tarrant County, TX	Default Office	May 14, 2015 (11:47 AM)	Ready
<input type="checkbox"/> tb26	1	Tarrant County, TX	Default Office	May 14, 2015 (11:46 AM)	Ready
<input type="checkbox"/> tb24	1	Tarrant County, TX	Default Office	May 14, 2015 (11:46 AM)	Ready
<input type="checkbox"/> tb22	1	Tarrant County, TX	Default Office	May 14, 2015 (11:45 AM)	Ready
<input type="checkbox"/> tb21	1	Tarrant County, TX	Default Office	May 14, 2015 (11:45 AM)	Ready
<input type="checkbox"/> tb31	1	Tarrant County, TX	Default Office	May 14, 2015 (11:45 AM)	Ready
<input type="checkbox"/> tb11	1	Tarrant County, TX	Default Office	May 14, 2015 (11:44 AM)	Ready
<input type="checkbox"/> tb32	1	Tarrant County, TX	Default Office	May 14, 2015 (11:44 AM)	Ready
<input type="checkbox"/> tb33	1	Tarrant County, TX	Default Office	May 14, 2015 (11:44 AM)	Ready

Status

- Preparing (Includes: Data Entry Incomplete, Upload Image, Enter Data)
- Ready
- Pending or Pending – County Processing
- Rejected
- Recorded

The Work List Screen (cont)

The screenshot shows the 'Worklist - ePrepare' interface. At the top, there are several callout boxes pointing to specific UI elements: 'Refresh the list' points to a circular refresh icon; 'Export to Excel' points to an Excel icon; 'Include Downloaded Packages' points to a folder icon; 'Include Flagged Packages' points to a flag icon; 'Show by date ranges' points to a date range selector; 'Select which offices to include' points to a dropdown menu; and 'Select a Specific State' points to a state selection dropdown.

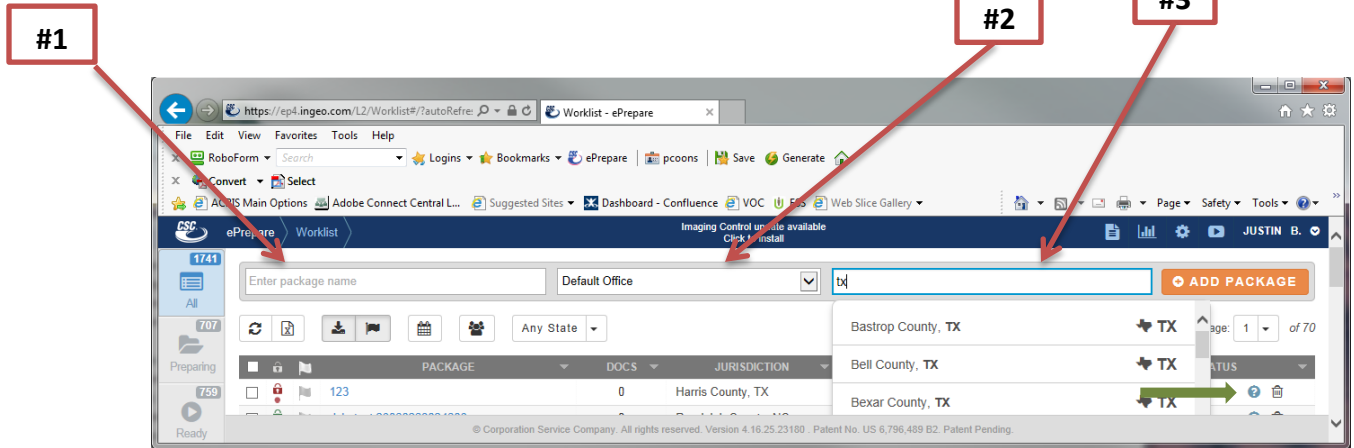
On the left side, a vertical sidebar contains a 'Filtering the Work List By Status:' section with callouts for 'Preparing', 'Ready', 'Pending', 'Rejected', 'Recorded', and 'Flagged', each pointing to a corresponding status filter icon.

The main area displays a table with the following columns: PACKAGE, DOCS, JURISDICTION, OFFICE, MODIFIED, and STATUS. The table contains multiple rows of package information, including package names like 'ctest altalsoft', 'slca039485test Randall', and 'ztampz', along with their respective document counts, jurisdictions, offices, modification dates, and current statuses (e.g., Ready, Pending, Rejected).

PACKAGE	DOCS	JURISDICTION	OFFICE	MODIFIED	STATUS
ctest altalsoft	1	Tarrant County, TX	Default Office	May 14, 2015 (4:52 PM)	Ready
slca039485test Randall	0	Salt Lake County, UT	Default Office	May 14, 2015 (4:26 PM)	Empty
ztampz	1	Davidson County, NC	Default Office	May 14, 2015 (4:08 PM)	Ready
alam	1	Alamance, NC	Default Office	May 14, 2015 (3:09 PM)	Preparing
rich23	1	Richland, SC	Default Office	May 14, 2015 (2:02 PM)	Pending - County Processing
rich22	1	Richland, SC	Default Office	May 14, 2015 (2:02 PM)	Pending - County Processing
dako21	1	Dakota County MN	Default Office	May 14, 2015 (1:28 PM)	Ready - DRAFT
mwdem04-594-5984	2	Harris County, TX	Default Office	May 14, 2015 (1:22 PM)	Ready - DRAFT
testtesttesttest	0	Montgomery County, TX	Default Office	May 14, 2015 (1:11 PM)	Empty
Kings NY	1	Kings, NY	Default Office	May 14, 2015 (1:10 PM)	Ready
ImageTesting_Landon	0	Tarrant County, TX	Default Office	May 14, 2015 (1:10 PM)	Empty
Macomb, MI County only exempt deed	0	Macomb County, MI	Default Office	May 14, 2015 (12:05 PM)	Empty
tb29	1	Tarrant County, TX	Default Office	May 14, 2015 (11:47 AM)	Ready
tb27	1	Tarrant County, TX	Default Office	May 14, 2015 (11:47 AM)	Ready
tb26	1	Tarrant County, TX	Default Office	May 14, 2015 (11:46 AM)	Ready
tb24	1	Tarrant County, TX	Default Office	May 14, 2015 (11:46 AM)	Ready
tb22	1	Tarrant County, TX	Default Office	May 14, 2015 (11:45 AM)	Ready
tb21	1	Tarrant County, TX	Default Office	May 14, 2015 (11:45 AM)	Ready
tb31	1	Tarrant County, TX	Default Office	May 14, 2015 (11:45 AM)	Ready
tb11	1	Tarrant County, TX	Default Office	May 14, 2015 (11:44 AM)	Ready
tb32	1	Tarrant County, TX	Default Office	May 14, 2015 (11:44 AM)	Ready
tb33	1	Tarrant County, TX	Default Office	May 14, 2015 (11:44 AM)	Ready


Creating Packages

1. Enter a package name
2. Choose your office (if applicable)
3. Start to type in the State initials or County name



TIP: Using a unique package name is helpful in searching for the package


TIP: From the Admin Tab you can set a default County and State

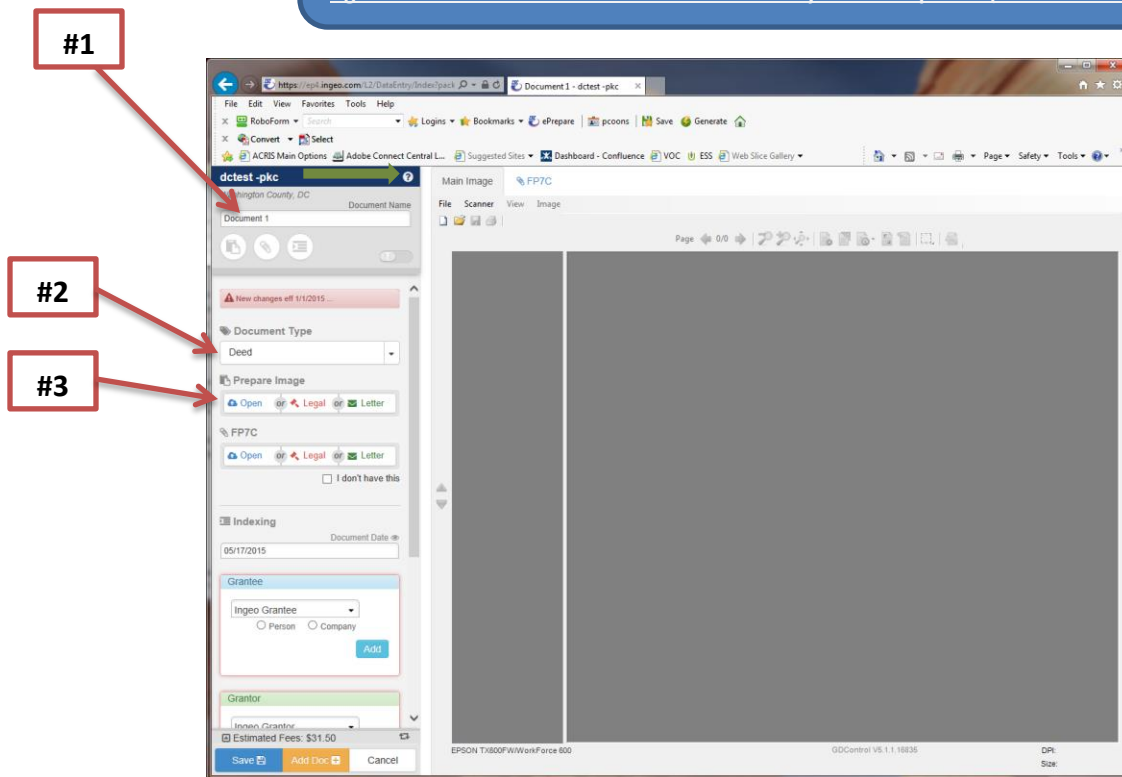
TIP: You can also email a help ticket to us from the work list by clicking on the  and entering in your question (See green arrow above).

4. Click **ADD PACKAGE**

This will bring you to a screen where you will upload, prepare and index your document.

1. On the left side of the screen, enter a document name (if applicable or use the default "Document 1") (#1)
2. Select your document type from the dropdown list (#2)

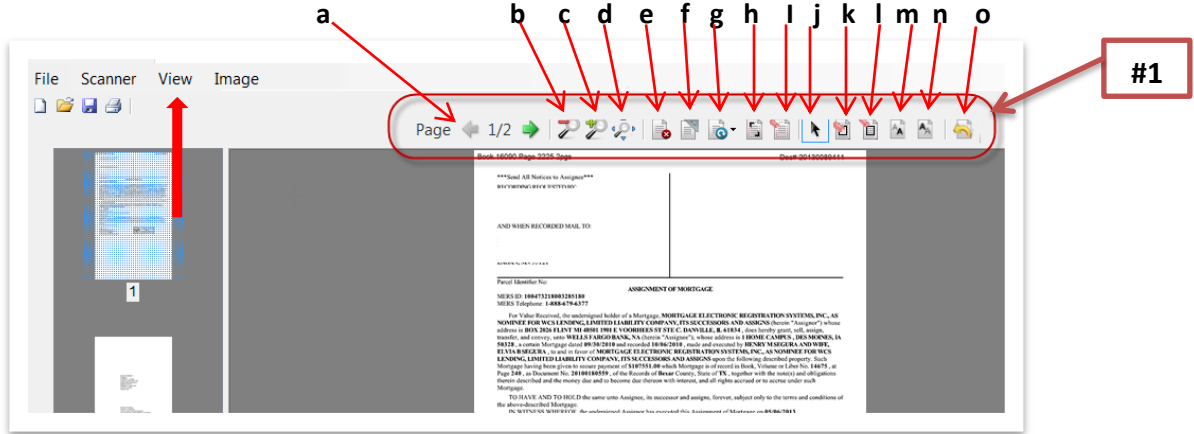
TIP: If the document type you have does not appear in the dropdown or you would like further clarification on what to select, please email csc-help@cscinfo.com OR call 855-200-1150 Press 2 OR you can click on the  on the right side of the work list to send a ticket directly to the help desk (see red arrow below).



3. Upload the document from your PC or scan it in from your scanner (#3).

4.

5. Make any adjustments to the image using the imaging utility (see below description for each icon). (#1).

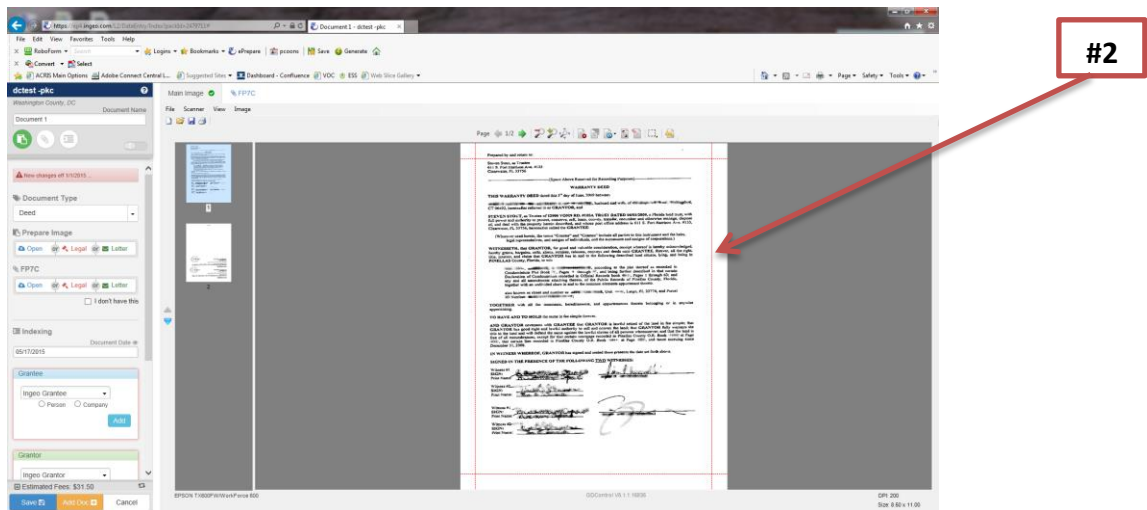


- a – move from page to page
- b – zoom out
- c – zoom in
- d – fit to screen
- e – delete page

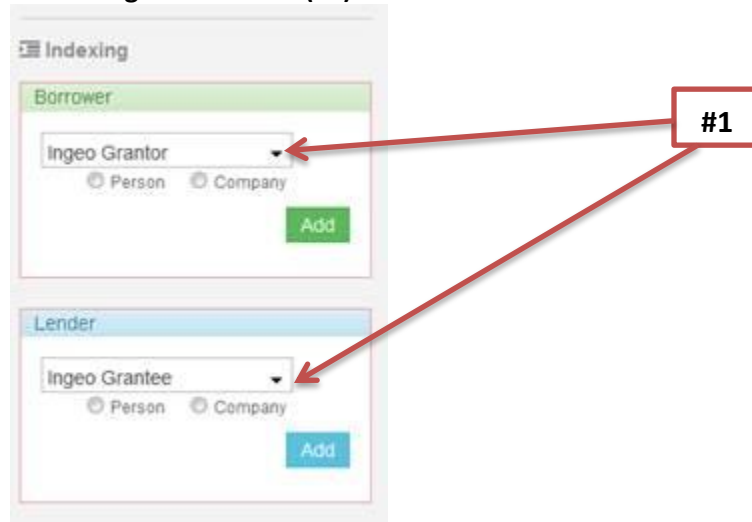
- f – deskew
- g – rotate
- h – adjust document to margins
- l – clear margins
- j – area selection tool

- k – erase inside current selection
- l – erase outside current selection
- m – darken inside current selection
- n – lighten inside current selection
- o – undo

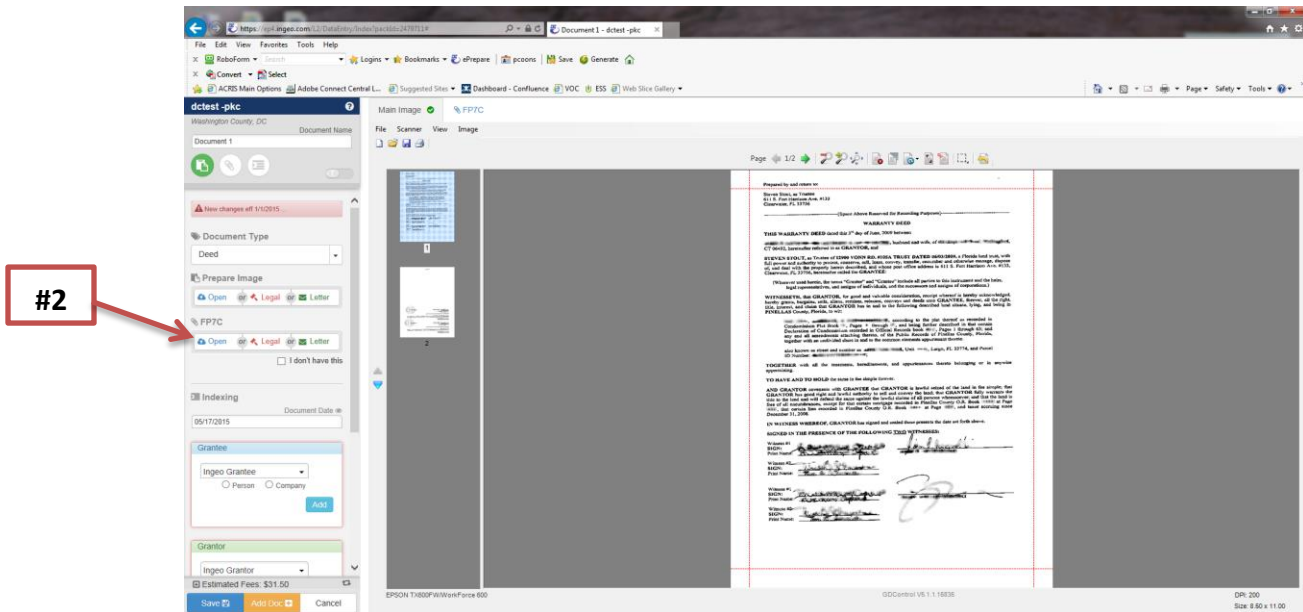
TIP: Click on View (see above red arrow) click Margin Lines. This will show your margin guidelines. (#2)



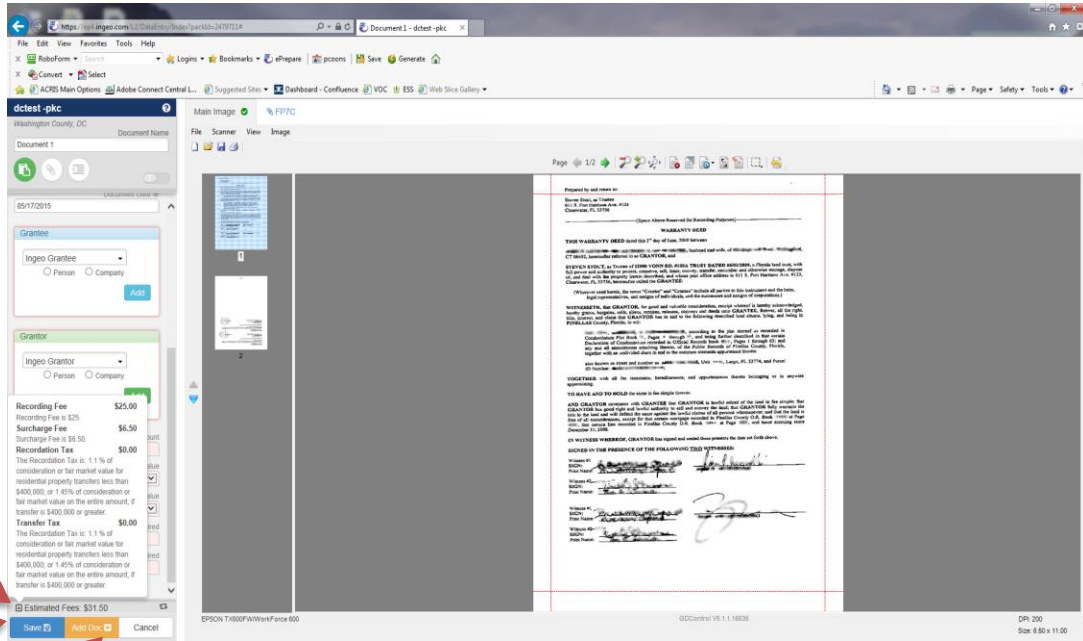
6. Enter Indexing information (#1)



7. If a document requires tax forms or a helper document be attached, upload by clicking open in the section related to that document. (#2)



8. Review estimated fees (the fees are estimates ONLY, they are not from the county). (#1)



#1

#3

#2

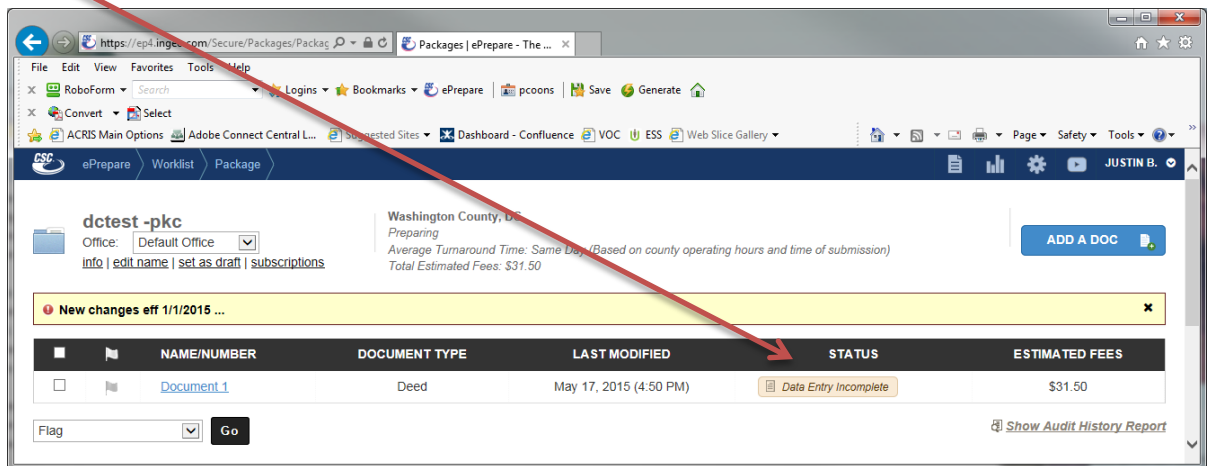
9. Click on Add Doc if have another document to add to the package. (#2)

OR

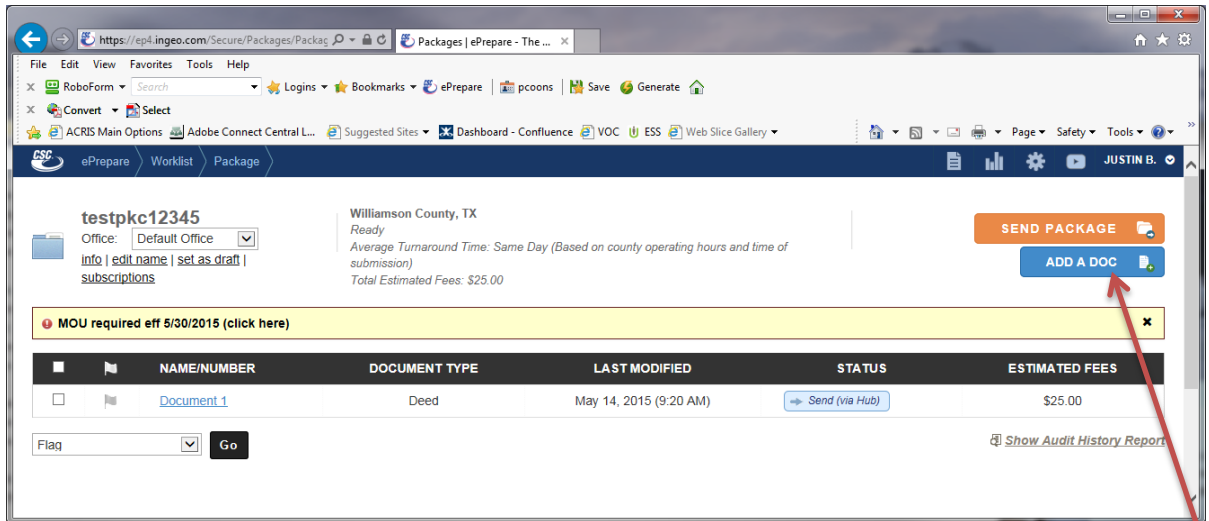
10. Click on Save if your package is complete. (#3)

This will bring you to a screen where you will send your package for recording or if you have not completed everything required to record this document, the status will show Date Entry Incomplete (#4). Which means you would go back into the document to find what is missing.

#4

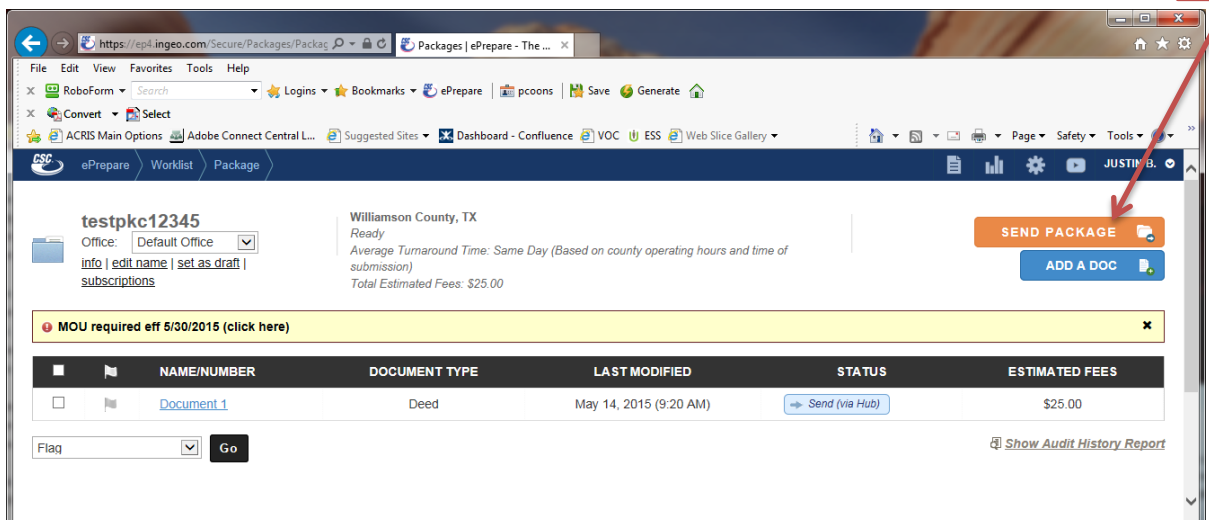


If at this point you remember you have another document to add click on Add A Doc (#1) and repeat the uploading and indexing step.



#1

11. If everything is complete you will click on the **SEND PACKAGE** (#2) and your package is on its way to the county.



#2

On the main work list, you can track the status of your packages.

Recorded Packages

- ❖ Status will reflect “Recorded” (#1)
- ❖ You can print (#2) or download (#3) from the work list

The screenshot displays the CSC ePrepare Worklist interface. At the top, there is a search bar and filters for 'Default Office' and 'Tarrant County, TX'. Below this is a table with columns: PACKAGE, DOCS, JURISDICTION, OFFICE, MODIFIED, and STATUS. The table lists several packages, all of which have a 'Recorded' status. Red boxes labeled #1, #2, and #3 are positioned above the table. Red arrows point from these boxes to the 'Recorded' status, the print icon, and the download icon in the first row of the table.

PACKAGE	DOCS	JURISDICTION	OFFICE	MODIFIED	STATUS
cco1	1	Conejos County, CO	Default Office	Mar 20, 2015 (1:09 PM)	Recorded
Kenny 03192015_1139	1	Conejos County, CO	Default Office	Mar 19, 2015 (1:40 PM)	Recorded
erie212_10	1	Erie County, NY	Default Office	Feb 27, 2015 (12:26 PM)	Recorded
erie212_9	1	Erie County, NY	Default Office	Feb 27, 2015 (12:26 PM)	Recorded
erie212_8	1	Erie County, NY	Default Office	Feb 27, 2015 (12:26 PM)	Recorded
erie212_7	1	Erie County, NY	Default Office	Feb 27, 2015 (12:26 PM)	Recorded
erie212_6	1	Erie County, NY	Default Office	Feb 27, 2015 (12:26 PM)	Recorded
erie212_5	1	Erie County, NY	Default Office	Feb 27, 2015 (12:26 PM)	Recorded
erie212_4	1	Erie County, NY	Default Office	Feb 27, 2015 (12:26 PM)	Recorded
erie212_2	1	Erie County, NY	Default Office	Feb 27, 2015 (12:26 PM)	Recorded
erie212_1	1	Erie County, NY	Default Office	Feb 27, 2015 (12:26 PM)	Recorded
erie212_1	1	Erie County, NY	Default Office	Feb 27, 2015 (12:22 PM)	Recorded

- ❖ You can also go directly into the package to print or download.
- ❖ Click on the package name. This will open the below screen where you can download (as a pdf or tif format) or print

The screenshot displays the CSC eRecording web application interface. At the top, there is a navigation bar with 'ePrepare', 'Worklist', and 'Package' tabs. Below this, the package details for 'Kenny 03192015_1139' are shown, including the division 'Conejos County, CO', office 'Default Office', and a total fee of '\$11.00'. There are buttons for 'INVOICE' and 'DOWNLOAD PACKAGE'. A table below lists the package contents:

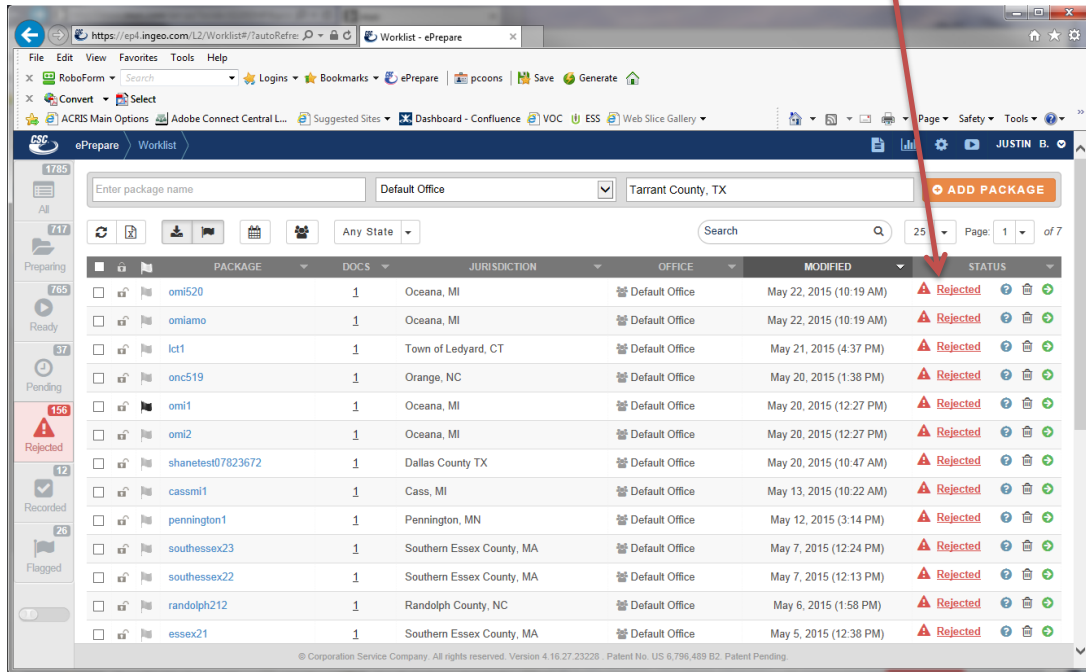
NAME/NUMBER	DOCUMENT TYPE	LAST MODIFIED	STATUS	RECORDATION INFO	FEES	DOWNLOAD
Document 1	Assignment	Mar 19, 2015 (1:40 PM)	Recorded	E20150319148 B P	\$11.00	

At the bottom of the page, there is a footer with the CSC logo and copyright information: '© Corporation Service Company. All rights reserved. Version 4.16.27.23228. Patent No. US 6,796,489 B2. Patent Pending.'

Rejected Packages

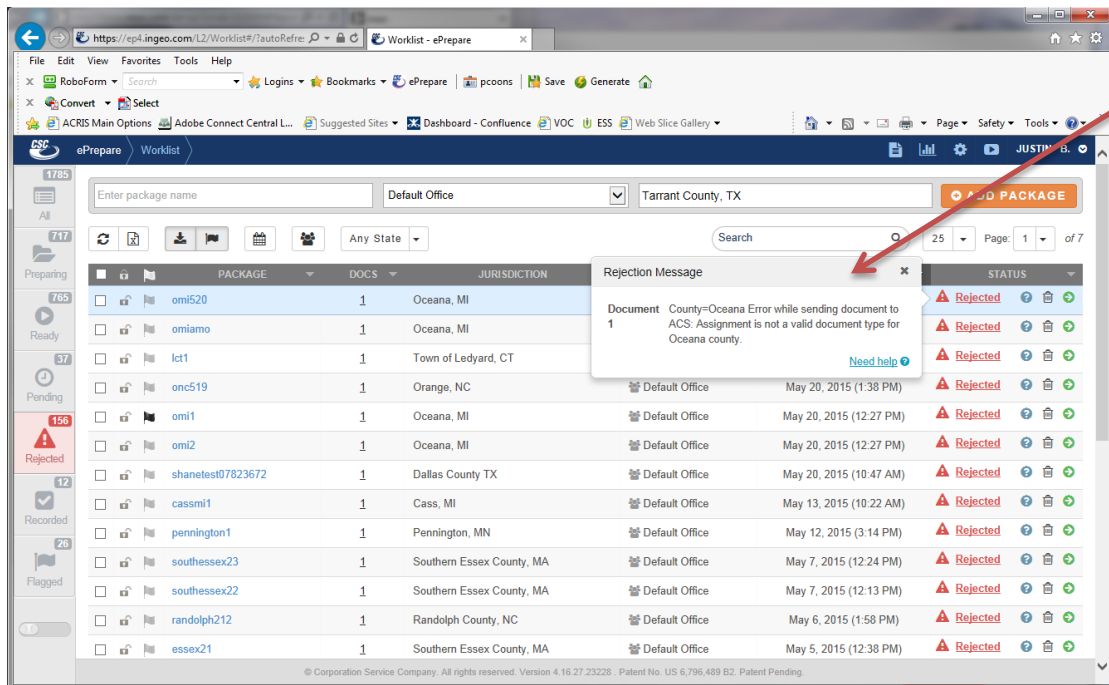
❖ Status will reflect “Rejected” (#1)

#1

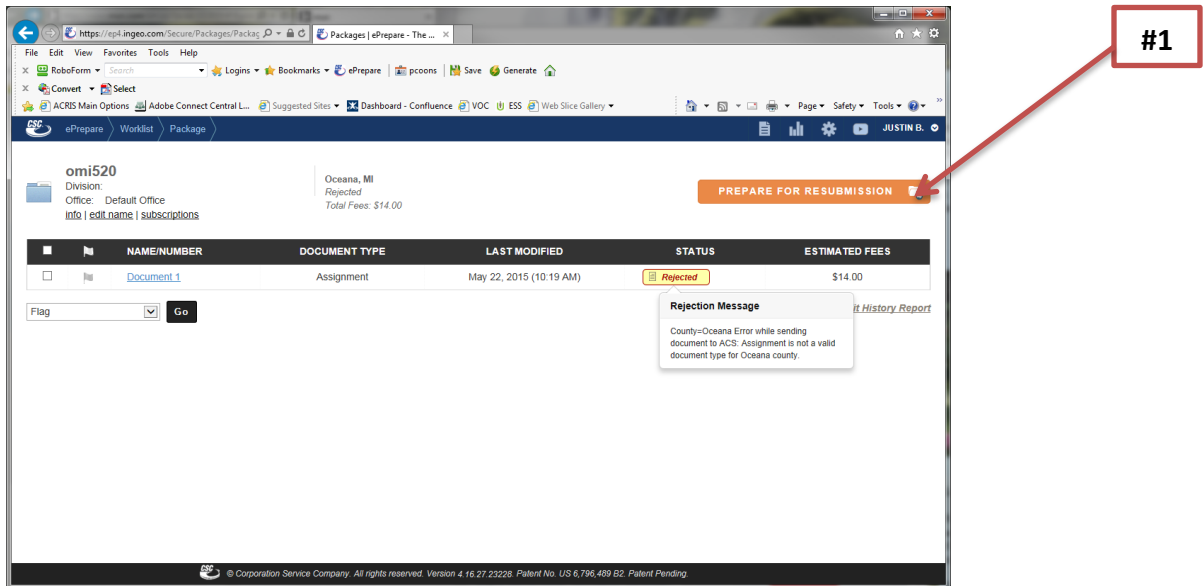


❖ When you click on the status “Rejected” the rejection reason will appear (#2)

#2

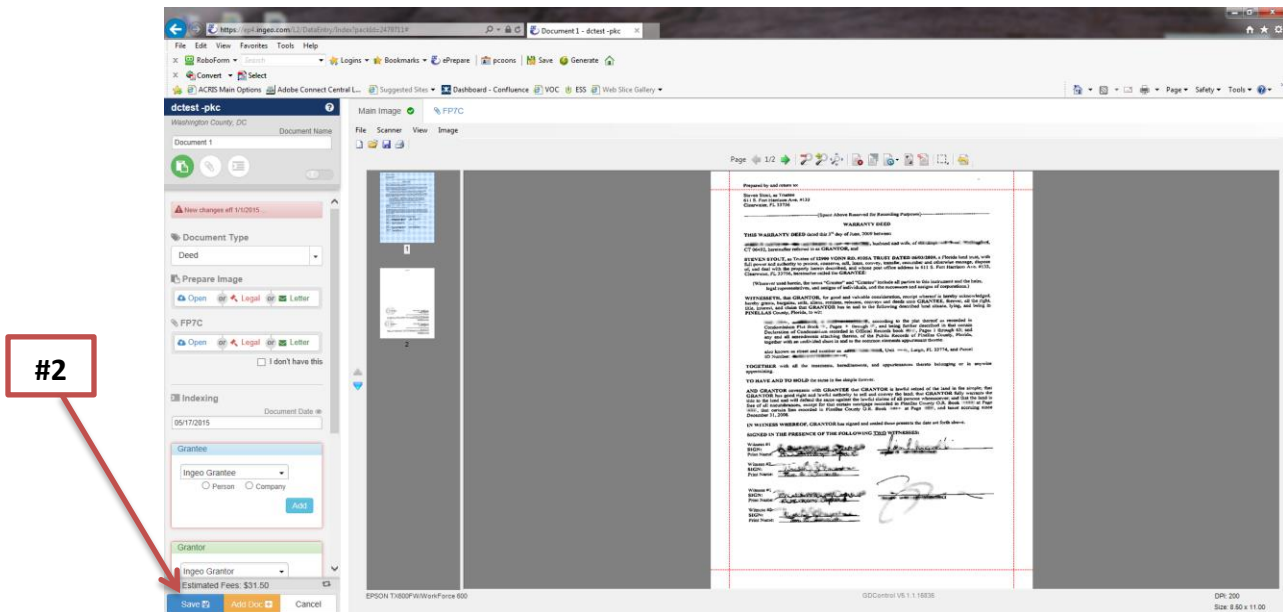


- ❖ When you click on the package name you will open the below screen
- ❖ Again, when you click on the status “Rejected” the rejection reason will appear
- ❖ Click on the “PREPARE FOR RESUBMISSION” (#1) button
- ❖ You then click on the relevant document name, to open the document and make the required corrections.



The screenshot shows the ePrepare interface for a package named 'omi520'. The package status is 'Rejected' with an estimated fee of \$14.00. A table below shows a document named 'Document 1' with status 'Rejected' and estimated fees of \$14.00. A red arrow points to the 'PREPARE FOR RESUBMISSION' button, which is labeled '#1' in a red box. A 'Rejection Message' pop-up is visible, stating: 'County=Oceana Error while sending document to ACS: Assignment is not a valid document type for Oceana county.'

- ❖ Once all corrections are made, click the **Save/Done** button and send the package (#2).



The screenshot shows the ePrepare interface for a document named 'Document 1 - dctest-pkc'. The document is a deed, and the 'Save/Done' button is highlighted in blue. A red arrow points to the 'Save/Done' button, which is labeled '#2' in a red box. The document is a deed, and the 'Save/Done' button is highlighted in blue.