

ESS

Electronic Services System – Standards Subcommittee Meeting

AGENDA **January 23, 2025** **Zoom** **10:00 A.M. to 12:00 P.M.**

Welcome and Introductions

October 17, 2024, Meeting Summary – Approval

Iowa Recording Fee and Business Process Modernization Project

- Status of Fee Policy Proposal - Recent Developments
 - 331.604

- Status of Statutory Policy Recommendations - Recent Developments
 - 558.49 (indexing requirements for conveyances)
 - 331.601A (page and transaction definitions)
 - 331.603 (ESS definition, and batch policy change to 331.605B)
 - 331.605B (ESS governance)
 - 331.606 (filing & indexing requirements – PINs, references, locations, time)
 - 331.606A (Back the Blue, ESS references)
 - 331.606B (formatting, required data, cover sheets, et al)
 - 331.612 (NEW SECTION – recording of surveys) and related updates
 - 354.18 (other surveyor statutes)

- Special Project Updates – Recent Developments
 - County Upload API Workflow
 - Data Normalization
 - Property Notification
 - Back the Blue Reform
 - Beacon Integration
 - Historic Surveys

Policies and Procedures

- Terms of Service – Active and Inactive Accounts - Application User Names

Software Development Update (Time Permitting)

- CESAPI Implementation
- Linux OS Migration

Next Regular Meetings 2025 Calendar:

Thursday, April 17
Thursday, July 17
Thursday, October 16

Standards Subcommittee Teleconference Meeting Summary October 17, 2024

Participants

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

Naomi Ellis, Marion County Recorder
Katie Carlton, Union County Recorder
Cathy Voith, Calhoun County Recorder

Other Participants

Nancy Booten, Lee County Recorder
Geraldyn Greer, Shelby County Recorder
Miranda Bills, County Recorder
Lisa Kent, Wapello County Recorder
Melissa Bahnsen, Cedar County Recorder

Jamie Stargell, County Recorder
Teresa Olson, Worth County Recorder
Stacie Herridge, Story County Recorder
Travis Case, Grundy County Recorder

Census Lo-Liyong, Iowa Land Records
Phil Dunshee, Iowa Land Records
Kristen Delany-Cole, Iowa Land Records

Lisa Long, Iowa Land Records
Samantha McMahon, Iowa Land Records
Corrie Strasser, 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 several members of the Document Formatting working group.

July Meeting Summary

The Subcommittee reviewed the July 30, 2024, meeting summary. Cathy Voith made a motion to approve the meeting summary. Jayne Schultz seconded, and the motion was approved.

Iowa Recording Fee and Business Process Modernization Project

Status of Fee Policy Proposal

The Subcommittee received an update on the status of the fee policy proposal including a review of draft amendments to Section 331.604 of the Iowa Code. The proposal included the following provisions:

1. Increasing the base recording fee from \$5 to \$10 per page.
2. Simplifying fees by eliminating the additional transactions fee, and the additional fees for Iowa Land Records and records management. The “non-standard” recording fee would also be eliminated with an amendment to 331.606B.
3. Allocating \$2 per document for recorders' technology and training.
4. Allocating \$3 per document for ESS and Iowa Land Records.
5. Allocating the remaining fee income to the county general fund.

Multiple Unrelated Transactions

Concerns had previously been expressed about possible unintended consequences for eliminating the additional transaction fee. There was speculation that some document preparers might try to take short cuts by combining different transactions into one document. Draft legislative language intended to prevent this from happening was reviewed.

Review of Stakeholder Reaction

The Subcommittee and working group received an update on the ongoing engagement with key stakeholder groups regarding the proposed recording fee and related policy adjustments.

Outreach efforts with the various key stakeholder groups were reviewed. Generally, the concepts being advanced have been openly received, and some groups have participated in more detailed discussions. While no one has said “no”, the stakeholders naturally want to see more details as the plans evolve.

Review of Advocacy Activity

An update was shared on recent advocacy efforts for the modernization and recording fee proposal, highlighting discussions with numerous recorders about their conversations with their supervisors and local stakeholders and legislators. It was noted that steps will be taken in the coming months to engage with key members of the legislative committees for Local Government and Ways and Means.

Status of Statutory Policy Recommendations

The Subcommittee received an update on the status of the modernization policy proposals including a review of draft amendments to Sections 331.605B, 331.606B, 331.606, and 558.49 of the Iowa Code. The proposal included the following provisions:

331.605B ESS Governance

The proposed legislation would consolidate all Iowa Code references to the Electronic Services System (ESS) and Iowa Land Records into section 331.605B. This is intended primarily to move current policies into one cohesive section of the Iowa Code.

The updated 331.605B would include some new policy which would authorize the establishment of a notification system, and update systems to shield certain information for the protection of certain endangered people.

331.606B (formatting, cover sheets, et al)

The proposed legislation would update document formatting requirements to reflect current practice and to provide preparers with additional flexibility. Notable changes include a change in the top margin requirement for the first page of a document, and the addition of a requirement for a minimum space for the recording stamp.

331.606 (general filing requirements)

The proposed legislation would establish a standard format for recording reference numbers, and require the indexing of parcel identification numbers, and associated references – when present in a document. Current practices, such as indexing parsed location information, would be required.

558.49 (indexing requirements for conveyances)

The proposed legislation would clarify the meaning of various terms such as date of instrument, the type of instrument, and the date and time of recording.

331.601A (definitions)

The proposed legislation would clarify the definitions of certain terms such as “page”.

331.612 (NEW SECTION – recording of surveys)

The proposed legislation would consolidate recording requirements for surveys into a new section of the Code of Iowa. The requirements would apply to all documents prepared and signed by a licensed land surveyor. Formatting requirements and requirements for the “index legend” would be detailed there.

Special Project Updates

The Subcommittee received an update on the status various projects associated with the modernization initiative.

Property Notification System

A plan has been developed to create a notification feature in the Iowa Land Records search application, allowing users to monitor property recording activity associated with names or with previously recorded documents.

Back the Blue Reform

A plan has been developed to convert the current "Back the Blue" redaction program into a "shielding" program. Access to certain records would be restricted except for certain authorized users.

Integration with GIS Systems

Plans are being developed to connect Iowa Land Records with other property information systems. Specifically, the integration would allow users of systems like Beacon to more easily access documents in the Iowa Land Records System, and conversely Iowa Land Records Users would more easily be able to access more detailed property information through the Beacon System. Similar methods could be used with other GIS systems.

Historic Surveys

The Iowa Society of Land Surveyors has expressed interest in digitizing older surveys that were not previously recorded. Iowa Land Records is developing a plan to work with surveyors to digitize unrecorded surveys and make them available online. These efforts aim to preserve historical data that may still hold value for the surveying community, particularly those dating from 1990 onward.

Data Normalization

Plans are being developed to implement a data normalization project aimed at filling gaps in indexing data to improve searchability. This could involve extracting information from other systems and filling in missing in the Iowa Land Records database. Other components of the plan would be designed to create more consistency in the processing of recording documents in Iowa's 99 counties.

It was noted that all of these topics would be on the agenda for the November 14, 2024, ESS Coordinating Committee meeting. The ESS Standards Subcommittee meeting was adjourned.

DRAFT

CURRENT

\$5 Base Recording Fee per page
 + \$1 records management (per document)
 + \$1 for an e-commerce fee to ILR (per document)
 = **\$7** for the first page

\$5 Auditor's Transfer Fee (per parcel not to exceed \$50)

\$7 Additional Transaction Fee (per each additional transaction)

\$10 Non-Standard Fee (per document & when applicable)



PROPOSED

\$10 base recording fee per page
 Cap of \$500 per document (over 50 pages)

\$5 Auditor's Transfer Fee (per parcel not to exceed \$50)



FEES TO BE REPEALED

\$1 Records Management fee (per document)
 • replaced with an allocation from the base fee

\$1 ILR/ E-Commerce fee (per document)
 • replaced with an allocation from the base fee

\$7 Additional Transaction fee (per additional transaction)

\$10 non-standard fee (per document & when applicable)



EFFECT

Base Fee Increases from \$5 to \$10
 With Fee Reform – the impact is lower

- One Page Document – Fee Increases from \$7 to \$10 → 42.8%
- Two Page Document – Fee Increases from \$12 to \$20 → 66.6%
- Three Page Document – Fee Increases from \$17 to \$30 → 76.5%
- Four Page Document – Fee Increases from \$22 to \$40 → 81.8%

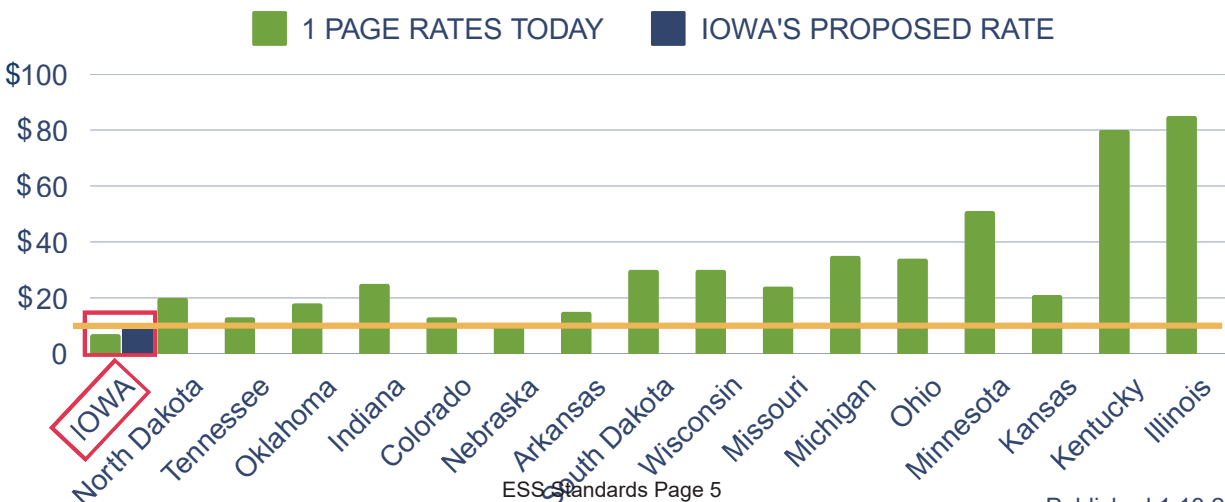
70% of total recorded documents in 2024 had three or fewer pages.

INFLATION COMPARISON

Base Fee Increases by 192%

- One Page Document – Fee Increases from \$7 to \$20.46 → 192.3%
- Two Page Document – Fee Increases from \$12 to \$35.08
- Three Page Document – Fee Increases from \$17 to \$49.70
- Four Page Document – Fee Increases from \$22 to \$64.31

IOWA RECORDING FEES COMPARED TO OTHER STATES



**TABLE OF STANDARD
RECORDING REQUIREMENTS**

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
	558.49				
	Defines the conveyance information that should be included in a recording.	The recorder must keep index records to show the following:	The recorder shall keep index records to show the following:	Updated language from "must" to "shall"	
558.49 (Intro)	Requirements for inclusion of grantor information.	1.Each grantor.			NO CHANGE
558.49 (1)	Requirements for inclusion of grantee information.	2.Each grantee.			NO CHANGE
558.49 (2)	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 (3)	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, when feasible. 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 (4)	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 deed, 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 example, is typically indexed, and therefore may be more understandable.	
558.49 (5)	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, and city, town or county, if platted.	This additional language is intended to clarify that parsed location information for a conveyance document is meant to be indexed.	NO CHANGE
558.49 (6)	Requires that the description of the property to be indexed.	7. The description of the real estate affected by the instrument.			
558.49 (7)					

**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.	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	Defines "batch basis" which is another way of describing a "bulk transfer" of records. Provides a general definition of traditional document such as a letter or contract or other legal action.	As used in this part, unless the context otherwise requires: 1. "Batch basis" 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)	Defines an "electronic document" and provides that an electronic document is the same as a physical document delivered by traditional methods.		3. "Electronic document" means a document or instrument that is received, processed, disseminated, or maintained in an electronic format. <i>The submission of an electronic document through the electronic services 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.</i>	Simply changes the name of the organization from the "county land record information system" to the electronic services system, consistent with the update to the 28E agreement in 2021.	

**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)	Provides a general definition "filing" or "submitting" which is different than the act of "recording". Defines the parties represented in a document.	4. "File or submit" means the act of delivering a document or instrument to a recording office for recording into the public records. 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 (5)					NO CHANGE
331.601A (6)	Defines "legibility" in the context of the recording standards. It is intended to ensure that archived documents including electronic images will be readable and usable.	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. Provides a general definition of recording. The first action of a "recording" is the assignment of a date and time of recording and a recording reference number.	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

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RECORDING REQUIREMENTS**

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
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.	10. Electronic Services System. The Electronic Services System is the organization formed under a chapter 28E agreement to create and implement a statewide county land record information system. The agreement is required by 2005 Iowa Acts, ch. 179, §101, as amended by 2021 Iowa Acts, ch. 126.	Establishes a definition for the Electronic Services System and clarifies that it is the governing entity for the county land record information system.	NO CHANGE
331.601A (10) NEW		NEW			
331.603					
331.603 (1)	Defines a duty or "general power" of a county recorder.	1. The recorder may administer oaths and take affirmations on matters relating to the business of the office of recorder as provided in section 63A.2.		Not related to recording or land records.	NO CHANGE
331.603 (2)	Defines a duty or authority of a county recorder.	2. Subject to the requirements of section 331.903, the recorder may appoint and remove deputies, assistants, and clerks.		Not related to recording or land records.	NO CHANGE
331.603 (3)	Authorizes a recorder to make a miniature reproduction of a recorded instrument. It also provides for indexing cross references between related documents, often referred to as "associated references".	3. The recorder may reproduce in miniature on a durable medium any instrument to be recorded. When a recorded instrument involves a release, assignment, or other subsequent reference to an original document, the separate instrument filed acknowledging the release, assignment, or other subsequent reference shall be reproduced. In lieu of marginal entries, the recorder shall cross-reference the release, assignment, or other subsequent reference with the record of the original document. When an official record is produced in miniature, a security copy shall be reproduced at the same time and kept outside of the courthouse.			NO CHANGE
331.603 (4)	Authorizes a recorder to maintained a combined indexed record.	4. The recorder may, in lieu of maintaining separate index books, prepare and maintain a combined index record or system which shall contain the same data and information as required to be kept in the separate index books.			NO CHANGE

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Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.603 (5a)	Sets parameters regarding the transfer of records on a batch basis.	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.	5. a. 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.	No change in policy is recommended, but the provisions relating to the county land record information system are moved to a different section of the code, 331.605B.	Relocate provisions relating to the electronic services system to 331.605B
331.603 (5b)	Requires that records transferred by a county under an agreement must not include personally identifiable information.	b. Electronic documents and records made available under this subsection shall not include personally identifiable information and shall be subjected to a redaction process prior to the transfer of the electronic documents or records to another person pursuant to an agreement under paragraph "a".			NO CHANGE
331.604 (1)	Establishes a base recording fee and requires a recording fee for each additional transaction	1. Except as otherwise provided by state law, subsection 4, or section 331.605, the recorder shall collect a fee of five dollars for each page or fraction of a page of an instrument which is filed or recorded in the recorder's office. If a page or fraction of a page contains more than one transaction, the recorder shall collect the fee for each transaction.	Except as otherwise provided by state law, subsection 6, 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. The maximum recording fee for documents with fifty or more pages is \$500.00.	Increases the base recording fee, eliminates the fee for additional transactions, and establishes a \$500.00 cap on the recording fee per document.	
	331.604				

**TABLE OF STANDARD
RECORDING REQUIREMENTS**

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.604 (2a)	Establishes an additional \$1 recording fee for preserving and maintaining public records. This is often referred to as the "records management" fee and fund.	2. a. The recorder shall also collect a fee of one dollar for each recorded transaction for which a fee is paid pursuant to subsection 1 to be used exclusively for the purpose of preserving and maintaining public records. The treasurer, on behalf of the recorder, shall establish and maintain a county recorder's records management fund into which all moneys collected pursuant to this subsection shall be deposited. Interest earned on moneys deposited in the fund shall be credited to the county recorder's records management fund. The recorder shall use the moneys deposited in the fund to produce and maintain public records that meet archival standards, and to enhance the technological storage, retrieval, and transmission capabilities related to archival quality records. The recorder may cooperate with other entities, boards, and agencies to establish methods of records management, and participate in other joint ventures which further the purposes of this subsection.	See below for the proposed modification to Section 2.		
331.604 (2b)	This section and the subsequent paragraphs specifies the authorized uses for the records management fee.	b. Fees collected pursuant to this subsection shall be used to accomplish the following purposes:	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.	Allocates \$2.00 from the base recording fee for each document to a recorder's technology advancement fund. Replaces the additional \$1.00 fee for records management.	
331.604 (2b1)	Authorized Use	(1) Preserve and maintain public records.	a. Maintaining and improving equipment, software and systems associated with recording and other duties administered by the office of the county recorder.	Authorizes that the technology funds may be used for technology and equipment used for recording and other duties.	
331.604 (2b2)	Authorized Use	(2) Assist counties in reducing record preservation costs.	b. Preserving and maintaining physical and electronic documents and instruments archived by the county recorder.	Authorizes that funds may be used for records preservation.	
331.604 (2b3)	Authorized Use	(3) Encourage and foster maximum access to public records maintained by county recorders at locations throughout the state.	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.	Authorizes that funds may be used for converting physical documents to electronic documents.	
331.604 (2b4)	Authorized Use	(4) Establish plans for anticipated and possible future needs, including the handling and preservation of vital statistics.	d. Participating in education and training for the purpose of advancing technology and improving the services provided by the office of the county recorder	Authorizes that funds may be used for education and training.	

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RECORDING REQUIREMENTS**

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.604 (2) unnumbered paragraph	NEW Requires the county land record information system to be a statewide system with the participation of every county and to implement the policies established by the governing board.	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.	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.	Similar to the current 331.604 (2a), the language describes the management of the technology fund by the county.	
331.604 (3a)				No change in policy is recommended, but the provisions relating to the county land record information system are moved to a different section of the code; 331.605B.	Relocated to 331.605B. Reference to the county land record information system are changed to be the Electronic Services System.
331.604 (3b1)	Establishes an additional \$1 recording fee for the county land record information system (electronic services system or ESS).	b. (1) The recorder shall also collect a fee of one dollar for each recorded transaction, regardless of the number of pages, for which a fee is paid pursuant to subsection 1 to be used for the following purposes:	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 funds 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.	Allocates \$3.00 from the base recording fee for each document to an electronic services system fund. Replaces the additional \$1.00 fee for the county land record information system. Similar to the current 331.604 (3c), the language describes the management of the technology fund by the county.	Reference to the county land record information system are changed to be the Electronic Services System. Consolidation of governance language for the Electronic Services System. Relocated to 331.605B.
331.604 (3b1a)	A defined ESS authority	(a) Establishing and implementing standards for recording, processing, and archiving electronic documents and records.	See 331.604 (3) above.		Consolidation of governance language for the Electronic Services System. Relocated to 331.605B.
331.604 (3b1b)	A defined ESS authority	(b) Maintaining the statewide internet site and the county land record information system.	See 331.604 (3) above.		Consolidation of governance language for the Electronic Services System. Relocated to 331.605B.
331.604 (3b1c)	A defined ESS authority	(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.	See 331.604 (3) above.		Consolidation of governance language for the Electronic Services System. Relocated to 331.605B.

**TABLE OF STANDARD
RECORDING REQUIREMENTS**

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.604 (3b1d)	A defined ESS authority At one time the fee was set higher to providing funding for redaction activity. The fee was maintained at a lower level for surveys as those documents did not contain PII.	(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.	See 331.604 (3) above.		Consolidation of governance language for the Electronic Services System. Relocated to 331.605B.
331.604 (3b2)	When initially established, there was some thought that the authorized fees would be more than necessary. This did not happen.	(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.	Repeal	This is an artifact of prior legislation and is no longer applicable.	
331.604 (3b3)		(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.	Repeal	This is an artifact of prior legislation and is no longer applicable.	
331.604 (3c)	Created a local county fund to manage the \$1.00 fee for the county land record information system.	c. The county treasurer, on behalf of the recorder, shall establish and maintain a county recorder's electronic transaction fund into which all moneys collected pursuant to paragraph "b" shall be deposited. Interest earned on moneys deposited in this fund shall be computed based on the average monthly balance in the fund and shall be credited to the county recorder's electronic transaction fund.	Incorporated with 331.604 (3) above.		

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RECORDING REQUIREMENTS**

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.604 (3d)	Created a fund in the state treasurer's office to manage the \$1.00 fee for the county land record information system. Counties transfer the funds under 331.604 (3c) monthly to the state treasurer's fund.	d. The local government electronic transaction fund is established in the office of the treasurer of state under the control of the treasurer of state. Moneys deposited into the fund are not subject to section 8.33. Notwithstanding section 12C.7, interest or earnings on moneys in the local government electronic transaction fund shall be credited to the fund. Moneys in the local government electronic transaction fund are not subject to transfer, appropriation, or reversion to any other fund, or any other use except as provided in this subsection. On a monthly basis, the county treasurer shall pay the fees deposited into the county recorder's electronic transaction fund to the treasurer of state for deposit into the local government electronic transaction fund. Moneys credited to the local government electronic transaction fund are appropriated to the treasurer of state for the payment of claims approved by the governing board of the county land record information system.	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.	Funds allocated under the new 331.604 (3) would be transferred monthly from the county directly to the Electronic Services System.	
331.604 (3d) cont.	A defined ESS authority	Except as otherwise provided in this subsection, expenditures from the fund shall be 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.	None	Authorized uses would be specified in a revised 331.605B	
331.604 (3e)	Requires that information be maintained for review by county auditors and the state auditor	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.	5. The county recorder or the electronic services 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 purpose of determining the amount of the allocations and the uses for which such allocations are expended.	The requirement for funds allocated under either 331.604 (2) or 331.604 (3) to subject to review by state auditor are retained.	

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Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.604 (3f)	Allows for the 28E agreement for the electronic services system to be amended.	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.		No change in policy is recommended, but the provisions relating to the county land record information system would be moved to a different section of the code, 331.605B.	
331.604 (3g1)	Establishes the "Back the Blue" information redaction program and defines eligible participants.	g. (1) Upon request by 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, the county assessor or the county assessor's staff, or the county recorder or the county recorder's staff, shall redact the requestor's name contained in electronic documents that are displayed for public access through an internet site. (2) Upon request by a former peace officer, as defined in section 801.4, or a former civilian employee of a law enforcement agency, the county assessor or the county assessor's staff, or the county recorder or the county recorder's staff, may redact, upon the presentation of evidence that a compelling safety interest is served by doing so, the requestor's name contained in electronic documents that are displayed for public access through an internet site.		Provisions relating to the redaction of certain information from peace officer records would be moved to 331.606A.	
331.604 (3g2)	Establishes the "Back the Blue" information redaction program and defines eligible participants. Excludes certain positions from participating in the program.	(3) This paragraph does not apply to a requestor holding or seeking public office.		Provisions relating to the redaction of certain information from peace officer records would be moved to 331.606A.	
331.604 (3g3)	Requires county assessors and recorders to set up a process to implement the program.	(4) The county assessor and the county recorder shall implement and maintain a process to facilitate requests pursuant to this paragraph.		Provisions relating to the redaction of certain information from peace officer records would be moved to 331.606A.	

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331.604 (3g5)	Specifies that the service would be provided at no cost to the participant.	(5) A fee shall not be charged for the administration of this paragraph.		Provisions relating to the redaction of certain information from peace officer records would be moved to 331.606A.	
331.604 (4)	Specifies that a county would not be required to pay a recording fee for filing documents with the recorder except for specific purposes.	4. 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.	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	NO CHANGE except renumbering the section to be 331.604 (6)	
Session Law					
Session Law 1	NEW		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 transition may be implemented by changing the name of the county recorder's records management fund to be the recorder's technology advancement fund.	Provides for the transition of any remaining balance to the new county technology fund upon the effective date of the act.	
Session Law 2	NEW		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 transition 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.	Provides for the transition of any remaining balance to the new county electronic services system fund.	Going forward, these funds would be remitted from the county to the electronic services system.
Session Law 3	NEW		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.	Provides for the preservation of any remaining balance in the transaction fund (Fund 255) in the until it is exhausted by the electronic services system.	The electronic services system could continue to be authorized to access the fund until all moneys are expended.
331.605B					
	331.605B (1) RESTRUCTURED - NEW		331.605B (1) The Electronic Services System, as defined in Section 331.601A, shall develop, operate and maintain a statewide county land record information system and internet site for the following purposes.	Consolidates purposes currently found in 331.604(3b), 331.604(3d) and 331.605B	
	NEW		a. Provide statewide online access to recorded public documents and instruments	331.604(3b-1b), 331.604(3d) and 331.605B(2)	
	NEW		b. Enable statewide electronic filing for recording documents and instruments	331.604(3b-1b), 331.604(3d) and 331.605B(2)	
	NEW		c. Receive authorized payments for services provided	331.605B(2)	

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	NEW		d. Implement security and redaction systems to protect users and Iowa citizens	331.604(3b-1d) and 331.605B(2)	
	NEW		e. Integrate with other appropriate relational property information systems	331.604(3b-1c) and 331.604(3d)	
	NEW		f. Establish business and technology standards for processing, recording, indexing and archiving documents and instruments and standards for county land record management systems in Iowa and the electronic services system	331.604(3b-1a)	
	NEW		g. Operate a system capable of notifying users of transactional activity associated with their property, name or other public services	NEW	
			331.605B (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 1.	The language here is taken from the first several sentences of the current version of 331.605B(2).	
331.605B (2)	RESTRUCTURED		331.605B (3) 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.	The language here is taken from the current version of 331.604(3a) and 331.604(3f).	
331.605B (3)	RESTRUCTURED		331.605B (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.	The language here is taken from the current version of 331.603(5a).	

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331.605B (5)	RESTRUCTURED		331.605B (5) Limitation of liability. The electronic services system is a unit of local government for purposes of chapter 670, relating to tort liability of governmental subdivisions. However, persons who have contracted with the governing board of the Electronic Services System to carry out the duties of the board are not employees for purposes of chapter 670, relating to tort liability of governmental subdivisions.	The language here is taken from the current version of 331.606A(7).	
331.605B (1)	This language was originally created to insure that funds authorized under 331.604 would be subject to 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.	PROPOSE RESTRUCTURED LANGUAGE ABOVE		

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331.605B (2)	<p>This language was originally created to ensure that online access to records would not require and access fee, and to ensure that any fees for land records management service would require statutory authorization. This was clarified further in 2021 when the legislature authorized the \$3.00 electronic recording service.</p>	<p>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.</p>	<p>PROPOSE RESTRUCTURED LANGUAGE ABOVE</p>		

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331.606			331.606 General indexing requirements. 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 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 no more than eight digits, and the county two-digit numeric number and the four-digit year shall precede 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 (1)	Generally this section of the Code is intended to define the indexing requirements in local county land records managemeth 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.	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.	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 paragraph	NEW		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, and the name of the applicable city, town or county. 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 electronic services system.	Language 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.	
331.606 new paragraph	NEW				
331.606 new paragraph	NEW		When present in a document or instrument submitted for recording, parcel identification numbers shall be indexed.	Language is added to clarify that parcel identification numbers shall be indexed.	

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331.606 new paragraph	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 allowed unless it is to correct an error. Language is added to include the exact time of recording. Recording times going forward would be required to be accurate to the second in all recording jurisdictions. The standard practice is to index the recording time, not the time of filing, and therefore a terminology change is suggested.	
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 document or instrument which shall be accurate to the second.		
331.606 (3)	Provides guidance on the disposition of records relating to the sale of weapons.	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)	Provides the recorder instruction on the archiving of records, and specifies that original or unaltered documents may be viewed in the office of the county recorder.				NO CHANGE
331.606A					
331.606A (1a)	Defines Personally identifiable information. PII	1. Definitions. a. "Personally identifiable information" means one or more of the following specific unique identifiers when combined with an individual's name: (1) Social security number. (2) Checking, savings, or share account number, credit, debit, or charge card number.			NO CHANGE
331.606A (1b)	Defines the "Preparer" of a document in the context of submitting for recording.	b. "Preparer" means the person or entity who creates, drafts, edits, revises, or last changes the documents that are recorded with the recorder.			NO CHANGE
331.606A (1c)	Defines redaction.	c. "Redact" or "redaction" means the process of permanently removing all or a portion of personally identifiable information from documents.			NO CHANGE

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Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.606A (2)	Prohibits preparers from including PII in documents submitted for recording.	2. Inclusion of personally identifiable information. The preparer of a document shall not include an individual's personally identifiable information in a document that is prepared and presented for recording in the office of the recorder. This subsection shall not apply to documents that were executed by an individual prior to July 1, 2007.			NO CHANGE
331.606A (3)	Requires the redaction of personally identifiable information as defined in subsection 1a.	3. Redaction from electronic documents. Personally identifiable information that is contained in electronic documents that are displayed for public access on an internet site, or which are transferred to any person, shall be redacted prior to displaying or transferring the documents. Each recorder that displays electronic documents and the county land record information system that displays electronic documents on behalf of a county shall implement a system for redacting personally identifiable information. The recorder and the governing board of the county land record information system shall establish a procedure by which individuals may request that personally identifiable information contained in an electronic document displayed on an internet site be redacted, at no fee to the requesting individual. The requirements of this subsection shall be fully implemented not later than December 31, 2011.	3. Redaction from electronic documents. Personally identifiable information that is contained in electronic documents that are displayed for public access on an internet site, or which are transferred to any person, shall be redacted prior to displaying or transferring the documents. Each recorder that displays electronic documents and the electronic services system that displays electronic documents on behalf of a county shall implement a system for redacting personally identifiable information. The recorder and the governing board of the electronic services system shall establish a procedure by which individuals may request that personally identifiable information contained in an electronic document displayed on an internet site be redacted, at no fee to the requesting individual.	Updates references to the electronic services system and removes an out-of-date artifact from prior legislation.	
331.606A (4)	Prohibits a redaction service provider from selling or transferring records they receive for processing.	4. Dissemination of documents. Persons who have contracted with a county recorder or the governing board of the county land record information system to redact personally identifiable information from electronic documents pursuant to subsection 3 shall not sell, transfer, or otherwise disseminate the electronic documents in an unaltered or redacted form, except as provided for in the contract.	4. Dissemination of documents. Persons who have contracted with a county recorder or the governing board of the electronic services system to redact personally identifiable information from electronic documents pursuant to subsection 3 shall not sell, transfer, or otherwise disseminate the electronic documents in an unaltered or redacted form, except as provided for in the contract.	Updates a reference to the electronic services system.	

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331.606A (5)	Places liability on the preparer of documents which include PII	5. Liability of preparer. A preparer who, in violation of subsection 2, enters personally identifiable information in a document that is prepared and presented for recording is liable to the individual whose personally identifiable information appears in the recorded public document for actual damages of up to five hundred dollars for each act of recording.			NO CHANGE
331.606A (6a)	Exempts certain documents from the PII prohibition.	6. Applicability. a. Subsection 2 shall not apply to a preparer of a state or federal tax lien or release, a military separation or discharge record, or a death certificate that is prepared for recording in the office of county recorder.			NO CHANGE
331.606A (6b)	Exempts certain documents from the redaction requirements.	b. Subsection 3 shall not apply to a military separation or discharge record, a birth record, a death certificate, or marriage certificate unless such record or certificate is incorporated within another document or instrument that is recorded and displayed for public access on an internet site.			NO CHANGE
331.606A (6c)	Prohibits public access to certain records on an internet site and other channels of communication.	c. If a military separation or discharge record or a death certificate is recorded in the office of the county recorder, the military separation or discharge record or the death certificate shall not be displayed for public access on an internet site, public access terminal or other medium, or be transferred to any person.			NO CHANGE
331.606A (7)	Limits the liability of the county land records information in a manner similar to other governmental subdivisions.	7. Limitation of liability. The county land record information system is a unit of local government for purposes of chapter 670, relating to tort liability of governmental subdivisions. However, persons who have contracted with the governing board of the county land record information system to carry out the duties of the board are not employees for purposes of chapter 670, relating to tort liability of governmental subdivisions.	Repeal		Consolidation of governance language for the Electronic Services System. Relocated to 331.605B (5).

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331.606A	NEW		<p>NEW SUBSECTION . Upon request by 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, the county assessor or the county assessor's staff, or the county recorder or the county recorder's staff, shall redact the requestor's name contained in electronic documents that are displayed for public access through an internet site. Upon request by a former peace officer, as defined in section 801.4, or a former civilian employee of a law enforcement agency, the county assessor or the county assessor's staff, or the county recorder or the county recorder's staff, may redact, upon the presentation of evidence that a compelling safety interest is served by doing so, the requestor's name contained in electronic documents that are displayed for public access through an internet site. This paragraph does not apply to a requestor holding or seeking public office. The county assessor and the county recorder shall implement and maintain a process to facilitate requests pursuant to this paragraph. A fee shall not be charged for the administration of this paragraph.</p>		NO CHANGE Relocated from 331.604 (3g)
		331.606B	<p>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.</p> <p>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.</p>	<p>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."</p>	
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:			

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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.	Requirements for documents prepared by licensed surveyors would be moved to a different section of the Code (331.612). [There has been some discussion of
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.	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.	

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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 in a physical form 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."	
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 marging	f. The first page of each document or instrument, other than 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.	Changes 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.	

**TABLE OF STANDARD
RECORDING REQUIREMENTS**

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
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. 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.	
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:	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. Requires a return address on the first page for the purposes of returning a document if its declined or needs more information.	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)		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

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RECORDING REQUIREMENTS**

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.606B (2d)	Requires the title of the document to be displayed on the first page.	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 grantors' details.	e. All grantors' names.			NO CHANGE
331.606B (2f)	Requirements for inclusion of grantees' details.	f. All grantees' names.			NO CHANGE
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
331.606B (2h)	A requirement to include the legal description of a property, if required. Such requirements are elsewhere in the Code, it is presumed.	h. The legal description of the property and parcel identification number, if required.			NO CHANGE
331.606B (2i)	The purpose of this section appears to be present a related document or instrument reference number, a.k.a. an associated reference.	i. A document or instrument number for statutory requirements, if applicable.	i. A recording reference number of an associated, recorded document or instrument, if applicable.	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 take 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. 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 an 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	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.		

**TABLE OF STANDARD
RECORDING REQUIREMENTS**

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
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.	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.	
331.606B (3a) new	NEW	NEW lettered paragraph.	a. As a cover sheet or page accompanying a document or instrument in a format approved by the electronic services system. A cover sheet shall be recorded contemporaneously as an additional first page to the document or instrument and shall conform to Section 31.606B, subsection 1. b. 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 electronic services system".	
331.606B (3c) new	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.	
331.606B (4a)	Proposed Repeal	4. a. 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. b. 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.			Relocated to 331.612 (3f)
331.606B (4b)	Proposed Repeal				Relocated to 331.612 (3g)

**TABLE OF STANDARD
RECORDING REQUIREMENTS**

Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.606B (4) 331.606B (5) Exempt	NEW		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.	While the "additional transaction fee" would be repealed, this language is intended to discourage document preparers from combining unrelated transactions in the same document.	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 electronic services system is declined for recording by a recorder, the recorder shall notify the submitter of the reason for the action to decline the document.	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)	
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. 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.	Whenever practicable, the recorder shall also advise the preparer or submitter of any actions necessary to correct the document or instrument. 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.		
331.606B (7a)	Provides that documents which do not conform to specified standards that they may be accepted for recording with the payment of an additional recording fee of \$10.00.		Repealed	Subsection 7a is recommended for repeal in conjunction with the fee modernization proposal to simplify the calculation of recording fees.	

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Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.606B (7b)	Provides that documents which do not conform to specified standards that they shall not be accepted for recording.	b. 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 recommended 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.	
	331.612 Recording of Surveys		As used in this part, unless the context otherwise requires:		
331.612 (1a)	NEW		Parcel Identification Number means an existing permanent real estate index number with related tax maps as provided in 441.29, subsection 2	New section 331.612 (4c) would require a PIN in the index legend. This defines the PIN for surveys to be associated with the the definition in 441.29.	
331.612 (1b)	NEW		Additional Parcel Identifier means a parcel letter or number designation approved by the auditor as per section 354.4 subsection 1 (a) and section 558.63. i. Subdivision plats, acquisition plats, and retracement plats of survey shall reference the existing Auditor's parcel designation as per section 354.4 subsection 1 (a) ii. A plat of survey shall reference the approved Auditor's parcel designation as per section 354.4 subsection 1 (a)	New section 331.612 (4b) would require an additional parcel identifier in the index legend, if applicable.	
331.612 (2)	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.	This subsection is intended to clarify the formatting standards for non-survey documents, as specified in 331.606B, do not apply to survey documents.	
331.612 (3)	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.	This paragraph introduces the formatting requirements for survey documents.	
331.612 (3a)	NEW		Contain text in a legible font of at least eight-point in size.	Maintains the eight-point font standard in this new section.	There is a possible amendment to remove a reference to surveys in 331.606B(1b)
331.612 (3b)	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.	There is a possible amendment to remove a reference to surveys in 331.606B(1c)

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Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.612 (3c)	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.	Aligns with the updated 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 large scale standard in the Iowa Code.	Related to revised definition for "page" in 331.601A (7)
331.612 (3e)	NEW		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.	Aligns with current ESS policy and for the first time establishes the scale standard in the Iowa Code for electronic documents.	Related to revised definition for "page" in 331.601A (7)
331.612 (3f)	NEW		Provide an Index Legend which includes information required for indexing and recording by the county recorder as specified in section 4.	No change in policy requiring an index legend, but applies it to all survey documents. Consolidates survey document standards in one primary Code section.	Replaces 331.606B(4a)
331.612 (3g)	NEW		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 electronic services system.	No change in policy requiring a space for the recording stamp, but applies it to all survey documents. Consolidates survey document standards in one primary Code section.	Replaces 331.606B(4b)
331.612 (4)	NEW		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	This paragraph introduces the content requirements for an index legend in all survey documents. Consolidates survey document standards in one primary Code section.	Replaces 355.6A (4c)
331.612 (4a)	NEW		County Name	Establishes the element as a standard component of the index legend for any survey type.	There is a possible amendment to remove a reference to surveys in 331.606B(2).
331.612 (4b)	NEW		Parsed location description. If not platted: Additional Parcel Identifier, if applicable, and Section, Township, Range, Quarter Section. The quarter quarter section is optional. If platted: Additional Parcel Identifier, if applicable, and Lot/Unit, Block, Subdivision Name (without abbreviation), Town/City/County as applicable, Section, Township and Range.	Incorporates section, township, range data elements into indexing for platted land, and adds the "additional parcel identifier" if applicable.	Replaces 355.6A (4c), Related to 355.6A (4b)

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Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
331.612 (4c)	NEW		The current Parcel Identification Number	Incorporates PIN information into indexing surveys.	Replaces 355.6A (4c). Related to the new 331.612 (1a).
331.612 (4d)	NEW		Proprietor: Name (if applicable and if multiple proprietors – only one is required)	Establishes the element as a standard component of the index legend for any survey type.	Replaces 355.6A (4c)
331.612 (4e)	NEW		Requested By: Name	Establishes the element as a standard component of the index legend for any survey type.	Replaces 355.6A (4c)
331.612 (4f)	NEW		Any known Associated Reference to a previously recorded survey document for the property	Clarifies that associated references to previously recorded surveys, if known.	Replaces 355.6A (4c)
331.612 (4g)	NEW		The surveyor's name, mailing address, and phone number or email address	Establishes the element as a standard component of the index legend for any survey type.	Replaces 355.6A (4c)
331.612 (4h)	NEW		Information necessary for the county recorder to return the survey document	Establishes the element as a standard component of the index legend for any survey type.	Replaces 355.6A (4c)
331.612 (4i)	NEW		Additional information if the survey document is a monument preservation certificate including the following: 1. The name of the government entity or other organization under which the surveyor provided the professional service 2. 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)
	354.18				
	Recording a plat of survey and filing in the office of the county auditor and assess ensures that the information is in the public record. This includes a "replat" which supersedes any original plat.	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.			
354.18 (1)					NO CHANGE

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Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
354.18 (2)	Before being placed in the public record, a plat must of the necessary approvals from other government offices.	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.	2. 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 physical or electronic copy of the plat from which legible copies can be made. The recorder may specify the material and the size of a physical 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 accept a plat as an electronic document with a page size as defined in 331.601A, subsection 7 and submitted through the electronic services system. The recorder shall not record a subdivision plat that violates this chapter.	Maintains the current standard for the smallest size of a plat, but references the large scales described in the updated in the definition of a "page" in 331.601A (7). This allows pages "up to twenty-four by thirty-six inches.	
	355.6A				
355.6A (4a)	Ensures that monument preservation certificates are timely filed.	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 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.	a. The monument preservation certificate shall be filed with the county recorder pursuant to section 331.612, subsection 4i, no later than thirty days after the certificate is signed by the surveyor b. The county recorder shall index the monument preservation certificate according to the township, range, section number, and quarter section in 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.	Removes an incorrect reference to 331.606B(5) and inserts a new reference to 331.612, subsection 4i.	
355.6A (4b)	Specifies the data elements required to be indexed for monument preservation certificates.			Makes a minor editorial change by removing the word "within". The requirements align with the requirements specified in the new 331.612 (4b).	

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Current Code Section	Current Purpose	Current Language	Proposed New Language	Summary and Purpose of Proposed Change	Notes
355.6A (4c)	Proposed Repeal	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.		Updated index legend requirements are specified in the new, consolidated requirements relating to surveys in the proposed 331.612.	See the proposed new section 331.612(4)
	355.10				
355.10 (1)	Ensures that plats are timely filed.	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. To retrace an existing recorded description of a parcel or tract of land.		Provided for reference only.	NO CHANGE
355.10 (2)	Specifies requirements for plats. Exempts subdivision plats from the thirty day requirement.	2. The plat and description shall show distinctly what piece of land was surveyed, the surveyor, and the date of the survey.		Provided for reference only.	NO CHANGE
355.10 (3)		3. The thirty-day requirement shall not apply to subdivision plats.		Provided for reference only.	NO CHANGE
	355.12				
355.12	Specifies general indexing requirements for surveys and corner certificates.	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.		Provided for reference only. The requirements align with the requirements specified in the new 331.612 (4b).	NO CHANGE

AN ACT TO MODERNIZE IOWA RECORDING POLICIES AND PRACTICES.

Section 1. Section 558.49, Code 2024, is amended to read as follows:

558.49 Index records.

The recorder ~~must~~ shall keep index records to show the following:

1. Each grantor.
2. Each grantee.
3. The date and time when the instrument was ~~filed with~~ recorded by the recorder.
4. The date ~~of the~~ on which the document or instrument was executed by the parties, when feasible. If there is a variance in the date of execution by the parties, the most recent date shall be indexed.
5. The nature of the instrument, as indicated by the title or type of the document or instrument.
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, and city, town or county, if platted.
8. Any recording reference number of an associated, recorded document or instrument, when present on a document submitted for recording.
9. The parcel identification number, when present on a document submitted for recording.

Section 2. Section 331.601A, subsection 3, Code 2024, is amended to read as follows:

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~~ electronic services 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.

Section 3. Section 331.601A, subsection 7, Code 2024, is amended to read as follows:

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 eight and one-half inches by fourteen inches, eleven inches by seventeen inches or up to twenty-four inches by thirty-six inches.

Section 4. Section 331.601A, Code 2024, is amended by inserting the following new numbered subsection:

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

Section 5. Section 331.603, subsection 5a, Code 2024, is amended to read as follows:

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.~~

Section 6. Section 331.604, Code 2024, 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 6, 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. The maximum recording fee for documents with fifty or more pages is \$500.00.
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 of 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 funds 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 money 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 Electronic Services 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 purpose 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.

Section 7. Transfer of Funds.

1. 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 transition may be implemented by changing the name of the county recorder's records management fund to be the recorder's technology advancement fund.
2. 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 transition 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.
3. 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.

Section 8. Section 331.605B, Code 2024, is amended by striking the section in its entirety and inserting in lieu thereof the following:

331.605B Electronic Services System

1. The Electronic Services System, as defined in Section 331.601A, shall develop, operate and maintain a statewide county land record information system and internet site for the following purposes.

- a. Provide statewide online access to recorded public documents and instruments
- b. Enable statewide 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. Integrate with other appropriate relational property information systems
- f. Establish business and technology standards for processing, recording, indexing and archiving documents and instruments and standards for county land record management systems in Iowa and the Electronic Services System
- g. Operate a system capable of notifying users of transactional activity associated with their property, name or other public services

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 a 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 1.

3. 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.

4. The governing board of the Electronic Services System shall not enter into an agreement to provide access to electronic documents or records on a batch basis.

5. Limitation of liability. The electronic services system is a unit of local government for purposes of chapter 670, relating to tort liability of governmental subdivisions. However, persons who have contracted with the governing board of the Electronic Services System to carry out the duties of the board are not employees for purposes of chapter 670, relating to tort liability of governmental subdivisions.

Section 9. Section 331.606, subsection 1, Code 2024, is amended to read as follows:

331.606 General filing indexing requirements.

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 filing 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 numbering assigning reference numbers to the documents or instruments, the recorder shall ~~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.~~ Reference numbers shall not include letters or special characters. Reference numbers shall include no more than eight digits, and the county two-digit numeric number and the four-digit year shall precede each reference. In addition to the standard reference number, the recorder may also assign a book and page reference to a document or instrument.

Section 10. Section 331.606, Code 2024, is amended to by inserting the following numbered paragraphs following subsection 1:

NEW ENUMERATED PARAGRAPH __. 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.

NEW ENUMERATED PARAGRAPH __. 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, and the name of the applicable city, town or county. 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, when present on a document it shall be indexed as an additional parcel identifier as specified by the electronic services system.

NEW ENUMERATED PARAGRAPH __. When present in a document or instrument submitted for recording a parcel identification number shall be indexed.

NEW ENUMERATED PARAGRAPH __. 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.

Section 11. Section 331.606, subsection 2, Code 2024, is amended to read as follows:

2. The recorder shall also note in the index the exact time of the filing recording of each document or instrument which shall be accurate to the second.

Section 12. Section 331.606A, subsections 3 and 4, Code 2024, is amended to read as follows:

3. Redaction from electronic documents. Personally identifiable information that is contained in electronic documents that are displayed for public access on an internet site, or which are transferred to any person, shall be redacted prior to displaying or transferring the documents. Each recorder that displays electronic documents and the ~~county land record information~~ electronic services system that displays electronic documents on behalf of a county shall implement a system for redacting personally identifiable information. The recorder and the governing board of the ~~county land record information~~ electronic services system shall establish a procedure by which individuals may request that personally identifiable information contained in an electronic document displayed on an internet site be redacted, at no fee to the requesting individual. ~~The requirements of this subsection shall be fully implemented not later than December 31, 2011.~~

4. Dissemination of documents. Persons who have contracted with a county recorder or the governing board of the ~~county land record information~~ electronic services system to redact personally identifiable information from electronic documents pursuant to subsection 3 shall not sell, transfer, or otherwise disseminate the electronic documents in an unaltered or redacted form, except as provided for in the contract.

Section 13. Section 331.606A, subsection 7, Code 2024, is amended by striking the subsection:

Section 14. Section 331.606A, Code 2024, is amended by inserting the following new subsection:

NEW SUBSECTION . Upon request by 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, the county assessor or the county assessor's staff, or the county recorder or the county recorder's staff, shall redact the requestor's name contained in electronic documents that are displayed for public access through an internet site.

Upon request by a former peace officer, as defined in section 801.4, or a former civilian employee of a law enforcement agency, the county assessor or the county assessor's staff, or the county recorder or the county recorder's staff, may redact, upon the presentation of evidence that a compelling safety interest is served by doing so, the requestor's name contained in electronic documents that are displayed for public access through an internet site.

This paragraph does not apply to a requestor holding or seeking public office.

The county assessor and the county recorder shall implement and maintain a process to facilitate requests pursuant to this paragraph.

A fee shall not be charged for the administration of this paragraph.

Section 15. Section 331.606B, subsection 1, Code 2024, is amended to read as follows:

331.606B Document or document formatting standards.

- ~~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:~~

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.

- ~~a. Each document or instrument shall consist of one or more individual pages not permanently bound or in a continuous form. For the purposes of this section, continuous form shall mean individual one-sided pages. The A document or instrument in a physical form shall not be permanently bound, have any attachment stapled, taped, or otherwise affixed to any page except as necessary to comply with statutory requirements, 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 stapled 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.~~
- ~~b. All preprinted text shall be in a legible font of at least eight ten point in size and no more than twenty sixteen 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. 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.~~
- ~~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 an exact typewritten or printed copy that meets the type size requirements of paragraph "b" and which shall be recorded contemporaneously as additional pages of the document or instrument.~~

- d. Each document or instrument ~~in a physical form, other than a plat or survey or a drawing related to a plat or survey,~~ shall be on standard white paper of ~~not less than twenty-pound weight~~ without watermarks or other visible ~~inclusions~~ markings. All text within the document or instrument shall be of sufficient ~~color and clarity~~ legibility to ensure that the text is readable when reproduced from the record.
- 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~~ clear and discernable 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.
- 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~~ 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, which shall be reserved for the recorder's use. 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.
- 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.

Section 16. Section 331.606B, subsection 2, Code 2024, is amended to read as follows:

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 or on a cover sheet or page as described in subsection 3.~~
 - a. The name, address, and either the telephone number or email address of the individual who prepared the document.
 - b. For any instrument of conveyance, the name of the taxpayer and a complete mailing address.
 - c. A return address.
 - d. The title or type of the document or instrument.
 - e. All grantors' names.
 - f. All grantees' names.
 - g. Any address required by statute.
 - h. The legal description of the property and parcel identification number, if required.
 - i. ~~A document or instrument number for statutory requirements~~ The recording reference number of an associated, recorded document or instrument, if applicable.

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.

Section 17. Section 331.606B, subsection 3, Code 2024, is amended to read as follows:

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 also be provided in one of the following forms.~~
 - a. As a cover sheet or page accompanying a document or instrument in a format approved by the electronic services system. A cover sheet shall be recorded contemporaneously as an additional first page to the document or instrument and shall conform to Section 331.606B, Section 1.
 - b. 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.

Section 18. Section 331.606B, subsection 4, Code 2024, is amended by striking the section and inserting in lieu thereof the following:

4. 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.

Section 19. Section 331.606B, subsection 6, Code 2024, is amended to read as follows:

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. 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 electronic services 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.

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.

Section 20. Section 331.606B, subsection 7, Code 2024, is repealed.

**Section 21. NEW SECTION 331.612 (tentative) Recording of Surveys:
331.612 Recording of Surveys**

1. As used in this part, unless the context otherwise requires:
 - a. 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.
 - b. 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.
2. 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.
3. Formatting Surveys for Recording. Any survey document or instrument which is submitted to a county for recording as described in this section shall conform to the following requirements.
 - a. Contain text in a legible font of at least eight-point in size.
 - b. Provide font colors, signatures and drawings which have sufficient weight, contrast and darkness to be reproducible.
 - c. 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.
 - d. 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.

- e. Electronic documents submitted to a county for recording through the electronic services system shall have a dimension which is no greater than twenty-four inches by thirty-six inches.
 - f. Provide an Index Legend which includes information required for indexing and recording by the county recorder as specified in section 4.
 - g. 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 electronic services system.
4. 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.
- a. County Name
 - b. 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
 - c. The current Parcel Identification Number
 - d. Proprietor: Name (if applicable and if multiple proprietors – only one is required)
 - e. Requested By: Name
 - f. Any known Associated Reference to a previously recorded survey document for the property
 - g. The surveyor's name, mailing address, and phone number or email address
 - h. Information necessary for the county recorder to return the survey document
 - i. Additional information, if the survey document is a monument preservation certificate, includes the following
 - 1. The name of the government entity or other organization under which the surveyor provided the professional service
 - 2. The name of the government entity or other organization requesting the monument preservation certification as provided in 355.6A

Section 22. Section 354.18, Subsection 2 is amended to read as follows:

2. 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 physical or electronic copy of the plat from which legible copies can be made. The recorder may specify the material and the size of ~~the~~ a physical 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 accept a plat as an electronic document with a page size as defined in 331.601A, subsection 7 and submitted through the electronic services system. The recorder shall not record a subdivision plat that violates this chapter.

Section 23. Sections 355.6A, Subsections 4a and 4b are amended to read as follows:

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

Section 24. Section 355.6A. Subsection 4c, Code 2024, is repealed.

Section 25. Section 355.12, Code 2024 is amended to read as follows:

355.12 Indexing of survey documents by recorder.

The recorder shall index survey documents and United States public land corner certificates pursuant to section 331.612 (4b) 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

Section 26. EFFECTIVE DATE.

1. The provisions of Section 9. Section 331.606, subsection 1, Code 2024, relating to the requirements for recording reference numbers shall be effective January 1, 2026.

(END)

Approved DRAFT by the Iowa County Recorders Association Executive Board and the Electronic Services System Coordinating Committee

November 26, 2024.

UNOFFICIAL
APPROVED DRAFT

AN ACT TO MODERNIZE IOWA RECORDING POLICIES AND PRACTICES

EXPLANATION

GENERAL – The bill updates and expands indexing and recording requirements for conveyance and other documents, updates the formatting and content requirements for documents submitted for recording, provides for the ongoing governance of the Electronic Services System, the 28E organization which hosts the Iowa Land Records website and applications, modifies and simplifies the fees charged for recording services, and establishes updated requirements for the recording of surveys and related documents.

BILL'S PROVISIONS – INDEXING OF CONVEYANCE DOCUMENTS. Section 1 clarifies that the indexes shall include certain information about recorded conveyance documents. It provides that the date and time assigned to a document is the time of recording (not the time of filing) and it clarifies that a “date of instrument” means the date on which a document is executed by the parties and the date to be indexed would be the most recent date. It clarifies that the “nature of the instrument is the title or type of the document. It clarifies that the information to be indexed about the description of the real estate should be the “parsed” location information as indicated by terms such as section, township, range or lot, block and subdivision name. It specifies that associated document references and parcel identification numbers are to be indexed if the information is present on a document.

BILL'S PROVISIONS – DEFINITIONS. Sections 2, 3 and 4 update definitions in 331.601A to clarify the use of the term electronic services system and to include larger scale survey documents in the definition of a page.

BILL'S PROVISIONS – GENERAL POWERS. Section 5 removes a reference concerning the county land record information and providing access to documents on a batch basis, but Section 8 moves the policy to an updated Section 331.605B. The effect of the amendment maintains current policy by prohibiting the Electronic Services System from providing access to documents on a batch basis.

BILL'S PROVISIONS – RECORDING FEES. Section 6 increases the base recording fee from \$5.00 per page to \$10.00 per page and eliminates the fee for additional transactions. A cap on the recording fee in the amount of \$500.00 per document would be established. It modifies the funding for maintaining and preserving records and for the county land information system by discontinuing the additional one dollar recording fees and instead allocates funds from the base recording fee for these purposes. The effect is to simplify the calculation of recording fees and to provide the resources needed for technology and operations and projects through the Iowa Land Records system. Specifically, the revised section allocates \$2.00 from the base recording fee for each document to a recorder's technology advancement fund and replaces the additional \$1.00 fee for records management. It authorizes the technology funds for technology and equipment used for recording and other duties, records preservation, converting physical documents to electronic documents, and for education and training. Similar to the current 331.604 (2a), the new section describes the management of the technology fund by the county.

The revised section also allocates \$3.00 from the base recording fee for each document to a recorder's electronic services system fund and replaces the additional \$1.00 fee for the county land record information system. Similar to the current 331.604 (3c), the language describes the management of the recorder's electronic services system fund by the county. Funds are to be transferred to the Electronic Services System on a monthly basis.

Both funds are subject to audit. Policies relating to participation in the Electronic Services System and the purposes of the system are moved from 331.604 to an updated Section 331.605B. Policies relating to the redaction of information about law enforcement officers are moved from 331.604 to 331.606A.

BILL'S PROVISIONS – TRANSFER OF FUNDS. Section 7 makes provision for making the transition from the supplemental fees to the allocations, and the transition from the existing funds to the new funds.

BILL'S PROVISIONS – GOVERNANCE OF THE ELECTRONIC SERVICES SYSTEM. Several policies concerning the Electronic Services System may currently be found in different sections of the Iowa Code. Section 8 proposes to consolidate those subjects into a common section of the Iowa Code; specifically, section 331.605B. The general intent is to craft a coherent governance section without fundamentally changing the current policies. Section 331.605B, subsection 1 enumerates the purpose and authorizations for the electronic services system, and the purpose areas are drawn from the pre-existing purposes in sections 331.604(3b-1 a-d), 331.604(3d) and 331.605B(2). New language authorizing the creation of a notification system has been added.

Section 331.605B, subsection 2 relating to statutorily authorized fees, is drawn from the current version of Section 331.605B, subsection 2. Section 331.605B, subsection 3 relating to amendments to the Electronic Services System 28E agreement, is taken from the current version of sections 331.604(3a) and 331.604(3f). Section 331.605B, subsection 4 relating to the prohibition of batch basis records transfers is taken from the current version of Section 331.603, subsection 5a. Section 331.605B, subsection 5 relating to the limitation of liability is drawn from the current version of 331.606A, subsection 7.

BILL'S PROVISIONS – GENERAL INDEXING REQUIREMENTS. General recording and indexing requirements are also specified in both Section 558.49 and Section 331.606B, subsection 2, and the amendments included here are intended to bring all requirements into alignment. Section 9 updates terminology with respect to the date of recording, and the type or title of a document. County recording systems are currently referred to as county land records management systems and this reference is added. A standard reference numbering system is established for all Iowa counties which would include a county's two-digit number, the four digit year, and a sequential number beginning with the number 1 starting on the first working day of the calendar year. Note: Section 26 provides that the effective date of Section 9 would be January 1, 2026.

BILL'S PROVISIONS – CODIFIED INDEXING REQUIREMENTS. Current accepted recording practices include the indexing of associated references, and parsed legal descriptions, Section 10 codifies these as required data elements to be indexed. The indexing of parcel identification numbers has been identified as a valuable data connector with other land record information systems, and Section 10 adds a requirement to index the parcel information and any additional parcel identifier when it is present on the document. It also clarifies that parcel identification numbers are historical in nature, and previously recorded indexes for antecedent documents should not be updated when a parcel number is subsequently changed for any reason.

BILL'S PROVISIONS – TIME OF RECORDING. Section 11 clarifies that it is the time of recording that is important when recording, not the time when it is delivered to the recorder. It also establishes that the recording time should be accurate to the second in all counties.

BILL'S PROVISIONS – REDACTION OF PERSONALLY IDENTIFIABLE INFORMATION. Section 12 clarifies that the electronic services system is responsible for the redaction of PII as described in Section 331.606A, subsections 3 and 4.

BILL'S PROVISIONS – LIMITATION OF LIABILITY. Section 13 repeals Section 331.606A, subsection 7, because it is being relocated to Section 331.605B, subsection 5. See BILL'S PROVISIONS – GOVERNANCE OF THE ELECTRONIC SERVICES SYSTEM.

BILL'S PROVISIONS – BACK THE BLUE REDACTION. Section 14 transfers the Back the Blue redaction program from 331.604, subsection 3g, to a new subsection to 331.606A. The transferred language makes no change in current policy.

BILL'S PROVISIONS – DOCUMENT FORMATTING STANDARDS. Section 15 updates requirements in Section 331.606B, subsection 1 for formatting documents submitted for recording to align with current and best practices. 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." A distinction is made between the requirements for physical documents compared to electronic documents. Archaic terms such as "typewritten" are removed. The updates provide document preparers with greater flexibility by requiring a minimum stamp area instead of a full three-inch margin at the top of the first page. More emphasis is given to legibility. An update is made to allow for the recording of documents submitted with personally identifiable information provided that a process is implemented to redact it before posting it on a website.

BILL'S PROVISIONS – REQUIRED CONTENT. Section 16 updates requirements Section 331.606B, subsection 2 for that preparers must provide recorders for indexing. Clarification of terms for document type and associated references is added. A technical change is made to remove a reference to a three-inch margin and to add a reference to the use of a cover sheet which is common practice. Changes which may facilitate better communication between recorders and submitters include the addition of providing an email address for the preparer, and the option to include contact information for a person best able to address document issues (other than the preparer).

BILL'S PROVISIONS – CONTENT OPTIONS. Section 17 is an updated Section 331.606B, subsection 3 and it further describes the option to use a cover sheet to provide the required information referenced in 331.606B, subsection 2, and the option to include a page number reference if necessary. Both options reflect current submission and recording practices.

BILL'S PROVISIONS – UNRELATED TRANSACTIONS. Section 18 seeks to clarify in Section 331.606B, subsection 4 that while there would no longer be an extra fee for “additional transactions”, preparers should be discouraged from combining unrelated transactions into a single document submitted for recording. Current language relating to formatting requirements for surveys are moved to a new section of the Iowa Code as described in Section 21.

BILL'S PROVISIONS – DECLINE REASONS. Section 19 in an updated Section 331.606B, subsection 6 clarifies that a declined physical document is to be returned to the preparer while a submitter of a declined electronic document may simply be informed (through the Iowa Land Records E-Submission service) that a correction is needed. This reflects current practice. The update also requires that fee changes for electronic documents must also be explained to a submitter. This is also a reflection of current practice.

BILL'S PROVISIONS – NONSTANDARD FEE REPEAL. Section 20 would repeal Section 331.606B, subsection 7a and discontinue the nonstandard recording fee of ten dollars when a nonconforming document is recorded. This will simplify the calculation of recording fees. Nonconforming documents must be corrected. subsection 7b would also be repealed as the revised introduction to 331.606B(1) provides clear authority for the recorders to decline documents which do not conform to the updated standards.

BILL'S PROVISIONS – SURVEY RECORDING STANDARDS. Section 21 would consolidate and update document formatting and recording standards for surveys, corner certificates, monument preservation certificates and other documents prepared by a licensed land surveyor. A new Code section is proposed. It establishes formatting requirements for any survey document submitted for recording, clarifies the requirements for the use of an “index legend” to provide recorders with the necessary information for indexing, and defines the terms “parcel identification number” and “additional parcel identifier” which may be included in some survey documents.

BILL'S PROVISIONS – SURVEY SIZE STANDARDS. Section 22 would update Section 354.18, subsection 2. Current practices are that all counties be able to scan physical documents with dimensions of up to 11 inches by seventeen inches. Electronic survey documents are accepted through the Electronic Services System with a dimension of up the twenty-four inches by thirty-six inches. The suggested change would align this section of the Code with current practices.

BILL'S PROVISIONS – REFERENCE UPDATES. Section 23 would update Section 355.6A, subsections 4a and 4b. The change to subsection 4a removes an incorrect and unnecessary Code reference. The change to subsection 4b is editorial and not substantive.

BILL'S PROVISIONS – SURVEY INDEX LEGEND. Section 24 would repeal Section 355.6A, subsection 4c relating to the “index legend.” This subject is addressed in the new Code section referenced in Section 21.

BILL'S PROVISIONS – INDEXING SURVEYS. Section 25 would update Section 355.12 relating to indexing surveys and corner certificates. The update would align the indexing requirements with the suggested new Section 331.612, subsection 4b which is referenced in Section 21.

BILL'S PROVISIONS – EFFECTIVE DATE. Section 26 provides that the effective date of requirements for recording reference numbers are to be effective and implemented as of January 1, 2026.

Approved DRAFT by the Iowa County Recorders Association Executive Board and the Electronic Services System Coordinating Committee

November 26, 2024.

**Section 21. NEW SECTION 331.612 (tentative) Recording of Surveys:
331.612 Recording of Surveys**

1. As used in this part, unless the context otherwise requires:
 - a. Parcel Identification Number means an existing permanent real estate index number with related tax maps as provided in 441.29, subsection 2
 - b. Additional Parcel Identifier means a parcel letter or number designation approved by the auditor as per section 354.4 subsection 1 (a) and section 558.63
 - i. Subdivision plats, acquisition plats, and retracement plats of survey shall reference the existing Auditor's parcel designation as per section 354.4 subsection 1 (a)
 - ii. A plat of survey shall reference the approved Auditor's parcel designation as per section 354.4 subsection 1 (a)
2. 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.
3. Formatting Surveys for Recording. Any survey document or instrument which is submitted to a county for recording as described in this section shall conform to the following requirements.
 - a. Contain text in a legible font of at least eight-point in size.
 - b. Provide font colors, signatures and drawings which have sufficient weight, contrast and darkness to be reproducible.
 - c. 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.
 - d. 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.
 - e. Electronic documents submitted to a county for recording through the electronic services system shall have a dimension which is no greater than twenty-four inches by thirty-six inches.
 - f. Provide an Index Legend which includes information required for indexing and recording by the county recorder as specified in section 4.
 - g. 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 electronic services system.

4. 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.
- a. County Name
 - b. Parsed location description:
 - If not platted: Additional Parcel Identifier, if applicable, and Section, Township, Range, Quarter Section. The quarter quarter section is optional.
 - If platted: Additional Parcel Identifier, if applicable, and Lot/Unit, Block, Subdivision Name (without abbreviation), Town/City/County as applicable, Section, Township and Range
 - c. The current Parcel Identification Number
 - d. Proprietor: Name (if applicable and if multiple proprietors – only one is required)
 - e. Requested By: Name
 - f. Any known Associated Reference to a previously recorded survey document for the property
 - g. The surveyor's name, mailing address, and phone number or email address
 - h. Information necessary for the county recorder to return the survey document
 - i. Additional information, if the survey document is a monument preservation certificate, includes the following
 - 1. The name of the government entity or other organization under which the surveyor provided the professional service
 - 2. The name of the government entity or other organization requesting the monument preservation certification as provided in 355.6A

Note: this editorial changes to Section was previously discussed and approved by the working group and will need to be incorporated within the study bill.

Note: These proposed changes to Section 21 are intended to clarify the definitions of Parcel Identification Number and Additional Parcel Identifier. The joint ICRA/SLSI working group is asked to provide a final review before submitting to the Legislative Services Agency.

Section 23. Sections 355.6A, Subsections 4a and 4b are amended to read as follows:

- a. The monument preservation certificate shall be filed with the county recorder pursuant to ~~section 331.606B, subsection 5~~ 331.612, subsection 4i, no later than thirty days after the certificate is signed by the surveyor.
- b. The county recorder shall index the monument preservation certificate according to the township, range, section number, and quarter section ~~or in~~ in which the monument is located ~~within~~. If the monument is located within an official plat, the county recorder shall also index the certificate alphabetically by the official plat name

Note: This editorial change to Section 23 was previously discussed and approved by the working group and will need to be incorporated within the study bill.

CUAPI

Uploading/Transferring of Documents to Iowa Land Records

Policies adopted by the governing board of the Electronic Services System/Iowa Land Records (ILR), the ESS Coordinating Committee, provide that counties are required to transfer to ILR “all recorded document information which is archived in electronic format. The required information includes both index data and unaltered document images. The policy also requires updated index information to be transferred to ILR. Index updates include error corrections, parsed data elements which were previously combined within a data element (such as a legal description), associated references between previously recorded documents and newly recorded documents.

Newly recorded documents are required to be transferred to ILR “not later than three business days after the time of recording by a county.” Older records that have been digitized and indexed in an electronic format are to be transferred “within a period of ninety days following the addition of the information to the electronic index or image archive.” See ESS Policies and Procedures, sections 4.5 and 4.6.

Iowa Law requires that all documents posted on a public website be subjected to a process to redact personally identifiable information (PII). The redaction process is a combination of scanning digital records with optical character recognition tools and human inspection of any document which may contain a defined PII artifact. Depending upon the volume of records, this process can require between 1 and 3 business days.

ESS and Iowa Land Records are considering modifications to the transfer policies to reflect two practical realities.

1. ILR users and county recorder constituents seek access to records as soon as possible, and
2. Normal processes for full indexing and any quality control inspection can commonly require more than 3 business days.

For these reason ESS and ILR are considering changes in policy to more closely align with common practices so that recording, transfer and redaction processes can be timelier and consistently implemented. The policy would allow for a partial transfer of a document image and a subset of the recording index data after an initial recording is completed. A full transfer of all index data would be required within a period of 30 calendar days following the recording date. Certain defined index updates would also be permitted after the 30-day period, but any desired updates outside of the approved definition would require approval and enabling by the ESS/ILR customer support team.

Initial Uploading/Transferring of Documents to Iowa Land Records

Generally, a document is officially recorded when it is assigned a recording reference number, and a date and time of recording. During this initial phase of the recording process, the data indexed may be limited to a few required elements. A recorded document would be considered sufficiently “complete” for initial transfer to ILR when the document image was archived by the county’s local land record information system (LRMS) and accompanied by the following index information: document type, e.g., deed, the official recording index reference number, the official recording date and time, a required unique code value assigned by the county’s LRMS (to

ensure that it isn't confused with any other document), and the name of at least one party (grantor or grantee) to the document/transaction (first and last name of a person OR an full name/organization name). An indicator to specify whether the party is a person or organization is required. Document types must be mapped from the county's document type list to the standard Iowa Land Records document types specified in sections 3.5 and 3.6 of the ESS Policies and Procedures.

In this initial step a county would have the option to index one or all of the parties in a document or transaction. Counties which also use book and page references could also provide that information.

This small set of data is all that is required for Iowa Land Records to perform the redaction process and then post the record online for user access. Again, current policy provides that newly recorded documents are to be transferred to ILR "not later than three business days after the time of recording by a county." Further, ESS policy encourages counties to programmatically transfer the minimum required data elements as soon as a document is considered minimally complete. Section 4.6 of the ESS Policies and Procedures provides that "if feasible, a scheduled automatic transfer of Forward File records shall be enabled with the consent of a County Recorder."

The following is a list of the minimum required data elements and where they can be found in the ILR data schemas. A transfer would not be accepted and return an error message if an initial transfer was not "complete."

Only party names and the person indicator can have multiple entries in the "minimum" data set. Other required elements must be singular for each recorded document.

Note: ESS policy may be updated to more clearly reflect that the transfer of minimum data is required within the 3-day period after recording.

Minimum Required Data Elements – Initial Upload

Common Data Title	Multiple Entries Permitted ?	Schema	Schema Data Element
County Name*	N	PRIA Document	countyOFRecordationName
ILR Document* Type	N	PRIA Document	type
ILR Document Type Other*	N	PRIA Document	typeOtherDescription
Reference Number*	N	PRIA Document	number
Book (if applicable)+	N	PRIA Document	bookNumber
Page (if applicable)+	N	PRIA Document	pageNumber

Unique Code Value (LRMS System)*	N	PRIA Document	code
One Grantor or Grantee First Name and**	Y	PRIA Document:Grantor Grantee	grantor:firstName or grantee:firstName
One Grantor or Grantee Last Name** - OR	Y	PRIA Document:Grantor Grantee	grantor:lastName or grantee:lastName
Person Indicator**	Y	PRIA Document:Grantor Grantee	nonPersonEntityIndicator
One Grantor/Grantee Full Name or Organization Name (as applicable)**	Y	PRIA Document:Grantor Grantee	unparsedName
Recording Date/Time*	N	PRIA Document	recordingDate
Embedded PDF Image*	N	PRIA Document or Embedded File	embeddedFile:documentencodingType: B64
Number of Image Pages*	N	PRIA Document or Embedded File	numberOfPages

* Required and Validated

+ For some counties this would be initially required because they may not yet use a reference number. The presence of either a reference number or book/page would be required and validated. If the state policy is changed to require the use of a standard reference number, the book/page data elements would become optional

** The presence of either one first name/last name with a person indicator OR one organization/full name with a person indicator would be required and validated.

Full Uploading/Transferring of Documents to Iowa Land Records

If a county completes their business processes to fully record and index a document within three business days, then all information can be transmitted to Iowa Land Records in the initial upload/transfer. However, it is not uncommon for a county to perform indexing, data verification and error checking and correction during a period immediately following the initial recording action. There are many data elements that counties are required to transfer to Iowa Land Records, but they aren't all in the list of "minimum requirements" for the initial transfer. These other data elements can be sent to ILR as an update to a document which has already been transferred to ILR.

The key data element used to identify a document "update" is the required Unique Code Value assigned by the local LRMS. The ILR county upload API (CUAPI) provides the means to update the database by appending additional data elements.

Data elements that were included in an initial upload do not need to be changed, and generally they shouldn't be unless there was a data error made in the initial upload. There are some data elements that cannot be updated including the following.

Unique Code Value (LRMS System)*
Embedded PDF Image*
Number of Image Pages*
County Name*

For an "update" transfer, grantor/grantee names, recording date/time, reference numbers including book/page, ILR Document Type and ILR Document Type Other can be modified or appended.

The CUAPI includes a new constraint that provides counties with up to 30 calendar days following the initial recording date to initially upload, modify a document record, or to append information in the ILR database. The CUAPI is structured to prevent the transfer of records to ILR which were recorded 30 or more days prior to an attempted transmission. At the end of the thirty-day period, the index information will be "locked" and editing would be restricted. A county and their local LRMS provider will need to contact Iowa Land Records to request permission to transfer or update records to ILR. This constraint has been established to facilitate communication between the county, ILR and the LRMS provider about uploading older records to ILR and about modifications required to correct errors in the data. This policy is also intended to protect the integrity of the ILR database.

In addition to the "minimum" initial data elements, the following data elements are required for a document to be considered "fully complete" and they must be transferred to Iowa Land Records either in an initial upload or in a subsequent update within the 30 day period following the recording date. Note that there is a difference between requiring the transfer of certain data in a county LRMS system, and the validation of the presence of the information during the transfer. It is understood, for example, that not all recorded documents will contain property location information.

Fully Required Data Elements – Completed Index Information
(Within 30 Days from the Recording Date)

Common Data Title (All Initial Required Data Elements) and ...	Multiple Entries Permitted ?	Schema	Schema Data Element
@ Remaining Grantor or Grantee First Names and	Y	PRIA Document:Grantor Grantee	grantor:firstName or grantee:firstName
@ Remaining Grantor or Grantee Last Names - OR	Y	PRIA Document:Grantor Grantee	grantor:lastName or grantee:lastName
@ All Grantor/Grantee Middle Names	Y	PRIA Document:Grantor Grantee	middleName
@ All Grantor/Grantee Unparsed Full Names	Y	PRIA Document:Grantor Grantee	unparsedName
@ All Grantor/Grantee Organization Names (as applicable)	Y	PRIA Document:Grantor Grantee	unparsedName
@ All Person Indicators	Y	PRIA Document	nonPersonEntityIndicator
@ Associated Reference Code to previously recorded documents	Y	PRIA Document:Associat ed Document	code
@ Associated Reference Document Type	Y	PRIA Document:Associat ed Document	type
@ Associated Reference Document Type Other	Y	PRIA Document:Associat ed Document	typeOtherDescription
*County Name	N	PRIA Document:Associat ed Document	countyOfRecordationName

@ All Applicable Parcel Identification Numbers	Y	Parcel Identification Number	numberIdentifier
@ All Applicable Parcel Identification Numbers	Y	Parcel Type Identifier	TypeIdentifier:ParcelIdentificationNumber
@ All applicable Additional Parcel Identifiers	Y	Platted Land	additionalParcelIdentifier
@ County Long Legal Description(s)	Y	Legal Description	textDescription
@ All Applicable Parsed Locations – Section Identifier	Y	UnPlatted Land	sectionIdentifier
@ All Applicable Parsed Locations – Township Identifier	Y	UnPlatted Land	propertyTownshipIdentifier
@ All Applicable Parsed Locations – Range Identifier	Y	UnPlatted Land	quarterSectionIdentifier
@ All Applicable Parsed Locations – Quarter Section Identifier	Y	UnPlatted Land	quarterSectionIdentifier
@ All Applicable Parsed Locations – Lot or Unit	Y	Platted Land	propertyLotIdentifier
@ All Applicable Parsed Locations – Block	Y	Platted Land	propertyBlockIdentifier
@ All Applicable Parsed Locations – Subdivision Name	Y	Platted Land	propertySubdivisionIdentifier
@ All Applicable City/Town/County Name(s)	Y (if properties overlap)	Platted Land	propertyCityTownIdentifier

	jurisdiction s)		
@ All Applicable Metes and Bounds Descriptions	Y	UnPlatted Land	metesAndBoundsRemainingText
*Instrument Date	N	PRIA Document	instrumentDate

@ Required if present in LRMS

* Required and Validated

Other Required Data Elements If Present – Completed Index Information
(Within 30 Days From Recording Date)

Common Data Title (All Required Data Elements) and ...	Multiple Entries Permitted?	Schema	Schema Data Element
@ Parsed Location – Quarter-Quarter Section Identifier	Y	UnPlatted Land	quarterQuarterSectionIdentifier
@ All Applicable Street Addresses (if present - unparsed)	Y	Property	streetAddress
@ All Applicable Street Addresses (if present - unparsed)	Y	Property	streetAddress2
Redaction Page?			
@ Local Redaction Coordinates (if present)	Y	Redaction Coordinates	Height
@ Local Redaction Coordinates (if present)	Y	Redaction Coordinates	width
@ Local Redaction Coordinates (if present)	Y	Redaction Coordinates	x
@ Local Redaction Coordinates (if present)	Y	Redaction Coordinates	y
Annotation Page?			
@ Local Notes Coordinates (if present)	Y	Notes Coordinates	Height

@ Local Notes Coordinates (if present)	Y	Notes Coordinates	width
@ Local Notes Coordinates (if present)	Y	Notes Coordinates	x
@ Local Notes Coordinates (if present)	Y	Notes Coordinates	y

@ Required if present in LRMS

* Required and Validated

<https://staging.iowalandrecords.org/search/services/county/swagger-ui/index.html>

DRAFT

Full Uploading/Transferring of Back File Documents to ILR

Counties may from time to time engage in projects to scan and electronically index older records. When the “back scanning” projects are completed, the transfer of records to Iowa Land Records is required within a period of ninety days. See ESS Policies and Procedures, section 4.5.

By definition, older or “back file” documents which are archived and indexed were not transferred to Iowa Land records within 30 calendar days. A county and their local LRMS provider will need to contact Iowa Land Records to request permission to transfer or update older records.

Prior to enabling the transfer of older records, a county and the local LRMS provider will be asked to provide a summary of the records to be transferred along with a csv table listing the documents to be transferred. This will permit the review of records for the purpose of avoiding the creation of record duplicates and redundant redaction, and to ensure that index data is appropriately mapped, e.g., document types. The following summary information is required.

- County Name
- The date range of the back file documents to be transferred
- Documentation and/or verification of the conformity of the index information to statutory and ESS standards such as the presence of parsed names, parsed location descriptions.
- Any history of locally applied redactions and verification that document images are unaltered except for the recording stamp or other indicia which may have been added by the recorder’s office
- Any history of locally applied image annotations
- Verification that images conform to encoding and related standards established by ESS

The csv table listing the documents to be transferred shall include the following information.

- Unique Code Value (LRMS System)
- Recording Reference Number (if present)
- Book Reference (if present)
- Page Reference (if present)
- Date/Time of Recording
- The assigned county document type
- The proposed and mapped ILR document type
- Indicator of redaction (if applicable)
- Indicator of annotation (if applicable)

Subject to the approval of an ESS administrator and technical staff, a county and local LRMS will be permitted to transfer the specified records to ILR through the CUAPI. [Note: an ESS ADMIN interface should be created to enable action to authorize the transfer of any back file records. This could be as simple as specifying a date range or more complex such as uploading a CSV file with a list of permitted code values.]

Uploading/Transferring Index Error Corrections

Counties may from time to time discover an indexing error in the local LRMS. Naturally, counties would correct any errors in the local system, and those corrections should be transmitted to Iowa Land Records. If the error correction is made local within the thirty-day period following the date of recording, then the update should be transferred automatically and programmatically to the Iowa Land Records System. Alternatively, methods established by the LRMS could permit the county to manually initiate the transfer of corrected index information to ILR. Timely corrections would be permitted through the CUAPI.

Index error corrections for documents which were recorded more than thirty days prior to the correction date can be made in the county LRMS at any time. However, the CUAPI will not automatically archive an index update such as the spelling correction of a party name, or an adjustment in a parsed location data element. Permission must be granted. It is generally assumed that after 30 days, the need for error corrections will be infrequent. However, there is no data or information available to support this assumption.

It is proposed that the CUAPI be configured to receive updates to older indexes using the following workflow.

- County makes indexing error correction
- The error correction is included in the normal flow of index updates transmitted by a county
- The update for the record is declined by the CUAPI, because the date of the transmittal is more than thirty days greater than the recording date of the indexed document.
- CUAPI captures the information being changed by the transfer.
- In ADMIN2, an interface is created to present the proposed change to an ESS administrator. [This could either be in application management or search management] The interface would present a table of pending index updates. The table displays the following information. County Name, Recording Reference, (Book/Page if applicable), date of recording, date of update/correction, the current data element value, and the proposed data element value. An action button is included to open a correction detail page.
- The correction detail page includes a link to the ILR search application which would display the index details. The correction detail page also includes action buttons to approve or decline the requested change. A text box is provided to allow the admin user to enter a custom message to the designated email in the recorder's office.
- If approved, the correction would be accepted and persisted to the database – with a standard approval message and any custom message (not required) added by the ILR admin user.
- If declined, the correction would NOT be accepted by the system. The ILR admin user would be required to enter a message in the text box, explaining the reason why the change was not accepted. [There could also be a menu of standard decline reasons to be selected.] The message would be returned via the API, AND an email to the recorder's office and the support email for the LRMS service provider. A log of correction actions (approved and declined) would be maintained for reporting purposes.

Uploading/Transferring Corrected Images

Counties are required to transfer to ILR all recorded document information which is archived in an electronic format. This includes document images which must be transferred in an original unaltered form. As provided in sections 3.11 (3) of the ESS Policies and Procedures, images may be replaced “provided that the replacement image does not obscure or alter the content or meaning of the original document” and provided that the image replacement is for one of the following purposes.”

- a. The image associated with the original document is incorrect, such as when the image does not match the associated recording information for a document, or
- b. The image associated with the original document is corrupt, such as when a scanned image is of poor quality or illegible when compared with the original document, or
- c. The image associated with the original document is incomplete, such as when pages are missing from the electronic document when compared with the original document.
- d. The image associated with the original document unintentionally alters the content or meaning of the original document, such as when a recording stamp is placed in a location which obscures a portion of the original document.

These requirements apply to the county LRMS system. Further, there is no thirty-day period following the date of recording within which an image can be replaced for any reason. When a county discovers an error with a document image, the image can be replaced locally only for the reasons specified.

When a county replaces an image as authorized, it should be transferred to Iowa Land Records. In this case the procedure requires that the county notify ILR by email or phone of the need for an image replacement. The county provides ILR with the appropriate reference number of the document and the reason for the image replacement.

If approved, an ILR admin user will use the Document Admin interface in Search Management to mark the document for image replacement. The county is then instructed to transfer a new image through the CUAPI. A log should be maintained to document the date and reason for the replacement.

Uploading/Transferring Appended Index Information

As noted previously, one of the purposes of the thirty-day window of time for updating indexing information and transferring it from a county to Iowa Land Records is to preserve the integrity of the ILR database. Once a document is recorded and fully indexed, it should never change. An exception is when an error is made with respect to either the index information or the document image and then discovered at a later date. This should be a rare and unusual event, as most errors are caught in the thirty-day period immediately following the initial act of recording.

Another exception is the creation of new information that, if appended to the recording index, the value of the index information would be enhanced. There are two applicable use cases.

Associated References. County LRMS should provide bilateral references between associated documents. An association between two documents means they are related to each other. Examples include a mortgage release (or modification) and the original mortgage. The index information for each document should include a reference to the other document, even when they are recorded years apart. Because a mortgage document would have been recorded prior to the release, any reference to the release indexed in the county LRMS which is added to the index information for the mortgage could not be uploaded to ILR. Therefore an exception to the thirty-day limit is needed to allow for an associated reference to be appended an antecedent document.

The Iowa Land Records schema used the Unique Code Value (LRMS System) as the associated reference. Using the example of a mortgage and release, when a Satisfaction of Mortgage is recorded, the Unique Code Value of the Satisfaction would be appended as the associated reference in the mortgage index information.

Note that the API would allow only for the addition of the new information, and deletions or modifications to information in the antecedent documents would not be permitted.

Newly Created Parcel Identification Numbers. When a property is subdivided or when a parcel of land is combined with another parcel, another county official may create a new parcel identification number for the new created parcel. The new parcel numbers may not be known to the recorder at the time of recording, but it may become known at a later date. If it becomes known during the thirty day period following the recording of the document, it can easily be added to the county LRMS index and transferred to Iowa Land Records.

If the new parcel identification number is not known under after the closure of the thirty-day window, it may be added to the LRMS index, but it couldn't be transferred to ILR. The exception in the CUAPI would be to allow the new number to be appended after the thirty-day period. Again, the API would not allow only for the deletion or modification of the existing indexed parcel identification number, as that information retains its historical value.

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.

Reverse Data Transfer from ILR to the County LRMS

Efforts to fill gaps in data are expected to be implemented in the future. Examples include the parsing of location information in the ILR database. An example is the presence of unparsed section, township and range information which had been transferred from a county to Iowa Land Records. ILR would separate the information in their respective fields to enhance options for searching by the parsed data elements. This action would improve the Iowa Land Records system but the county LRMS system would remain as it was – without information in the individual elements.

It is proposed that the CUAPI be modified to allow a county to make a call to the CUAPI to transfer ILR information to the County LRMS index. This would build upon an existing feature

which permits a county LRMS to retrieve redacted images and redaction coordinate information from ILR. This feature would only be available to counties and not to external third parties.

A user interface in ADMIN would be created to enable a reverse data transfer to a county within a specified date range and filtered by other criteria including the specified data elements or specific document IDs).

This same method could be used as a disaster recovery tool for a county if it was ever needed.

DRAFT

DATA ELEMENTS

December 30, 2024

To: ESS/ILR Service Providers
County Land Record Management Systems

From: Phil Dunshee, ILR Project Manager
Merna Addison, ILR Development Team

Re: Data Element Examples

We hope everyone has had a great holiday season!

In the last written quarterly update back on October 30 we included a description of data elements that each county should be transferring to Iowa Land Records (if present in the county system). These include:

- **Instrument Date.** Generally, this is the date on which parties execute a document. Current Iowa law requires that this information be indexed by the recorder if the document conveys property. In the upcoming legislative session, an amendment will be presented to clarify this requirement and to address the date that should be indexed if the parties don't execute the document on the same day. It is proposed that if there is a variance in the date of execution by the parties, the most recent date is to be indexed.

In the ILR structure, this data element can be found in the **PRIA Document** schema. See `PRIA Document:instrumentDate`.

- **Parcel Identification Numbers.** Parcel ID numbers (PINs) are usually associated with conveyance documents (parcels are being transferred) but may also be associated with survey or survey related documents. For now, we are focused primarily on the parcel identification numbers assigned by the county assessor.

In the ILR structure, PIN data elements can be found in the **Parcel Identification** schema. There are four data elements: `description`, `numberIdentifier`, `sequenceIdentifier`, and `typeIdentifier`. The key data elements we are looking for are the "numberIdentifier" (the actual PIN assigned by the assessor), and the `typeIdentifier` (in this case select the type `ParcelIdentificationNumber`). The type is important so that the number can be distinguished from the other types, most notably the `TaxMapIdentifier` and the `TaxParcelIdentifier`. [The fourth identifier is the "TorrensCertificateIdentifier" which is not applicable in the State of Iowa.]

The `sequenceIdentifier` can be used to help distinguish between the different PIN numbers, as the ILR structure allows for a document and a parcel to have more than one PIN number. The `sequenceIdentifier` is not required. Also, the "description" data element is not required.

IMPORTANT NOTE: The `numberIdentifier` allows for a maxlength of 32 characters, which should easily accommodate any county's PIN standard. The data element for an "assessorsParcelIdentifier" found in the **"Property"** schema should **NOT** be used, because this data element only allows for a maxlength of 16 characters. ILR is prepared to assist any county if they have previously mapped their PIN information to the `assessorsParcelIdentifier`.

All counties and service providers should be set up to transfer the `numberIdentifier` and the appropriate `typeIdentifier` to ILR through the **Parcel Identification** schema. Again, the type "ParcelIdentificationNumber" should be used. In the future, ILR will provide further clarification about the appropriate use of either the `TaxMapIdentifier` or the `TaxParcelIdentifier`

In the upcoming legislative session, an amendment will be presented to clarify the indexing requirements for PIN data, and all county land record management systems should be set up to index a parcel identification number and type for any document relating to property when applicable.

- **Additional Parcel Identifier.** Counties may index what is known as an Additional Parcel Identifier. As with parcel identification numbers, additional parcel identifiers are usually associated with conveyance documents (parcels are being transferred) but may also be associated with survey or survey related documents. The content and form of this data element may vary from county to county. Some may reference a capitol letter like parcel "A" or perhaps a character string of numbers separated by a hyphen. It is expected that county recorders will have further discussions about this topic. In whatever form it may take, if it exists in the county land record management system, it should be transferred to Iowa Land Records.

In the ILR structure, additional parcel information can be found in the ***Platted Land*** schema. There are two relevant data elements: additionalParcelIdentifier, and additionalParcelDescription. The additionalParcelDescription is not required.

In the upcoming legislative session, an amendment will be presented to clarify the indexing requirements for additional parcel identifiers. In the future, indexing of additional parcel identifiers may be legally required, if present on a document.

These three data elements remain as the primary items of interest. We will discuss the appropriate mapping of these data elements for CUAPI (both SOAP XML and REST JSON) in upcoming meetings.

To assist with planning for any needed changes in service provider integrations with the ILR county upload API (CUAPI), illustrations of the published schemas for CUAPI are provided below. Examples of the data in both the current XML and the new JSON structures are also provided.

This will be a topic of discussion at the next quarterly meeting on January 23 (2PM), and we are looking to schedule some one-on-one meetings sometime during the week of January 30.

Please share your observations and questions with us. Thanks, and have a Happy New Year!

ILR County Upload API Swagger Documentation Screen Shots

Go to the swagger pages for the CUAPI

(<https://staging.iowalandrecords.org/search/services/county/swagger-ui/index.html>)

IOWA LAND RECORDS

County Upload Rest API 1.0.0 OAS3

</search/services/county/v3/api-docs>

Additional documentation available [here](#)

Contact support@clris.com

Servers

<https://staging.iowalandrecords.org/search/services/county> - Generated server url

portal-rest-api-controller

- POST** `/api/archive` Archive document.
- GET** `/api/archiveStatus` Returns archive status for document(s).
- GET** `/api/auditDocumentInformation` Audit Document Information
- GET** `/api/downloadDoc/` Download document.
- GET** `/api/downloadRedactedDoc/` Download redacted document.

SWAGGER LANDING PAGE

Scroll down to the “Schemas” section

GET /api/findCheckedNoRedaction Returns a list of documents that have been checked for redaction but no redactions made.

GET /api/readyForRedactionDownload Returns a list of documents that were redacted and are ready for download.

Schemas

Alias >

Annotation >

SWAGGER CUAPI SCHEMA SECTION

Scroll further to find the PRIA Document, Parcel Identification and Platted Land data schemas.

PRIA Request >

PRIA Response >

Package >

Parcel Identification ▾ {
 description string
 maxLength: 256
 minLength: 0
 numberIdentifier string
 maxLength: 32
 minLength: 0
 sequenceIdentifier string
 typeIdentifier string
 pattern: ParcelIdentificationNumber|TaxMapIdentifier|TaxParcelIdentifier|TorrensCertificateIdentifier/
 Enum:
 > Array [4]
}

Parsed Street Address >

PARCEL IDENTIFICATION SCHEMA FOR numberIdentifier and typeIdentifier

```

PRIA Document ▾ {
  associatedDocument > [...]
  bookNumber > [...]
  bookType > [...]
  bookTypeOtherDescription > [...]
  code* > [...]
  consideration > [...]
  countyOfRecordationName* > [...]
  documentTitle > [...]
  embeddedFile > [...]
  execution Execution > {...}
  grantee > [...]
  grantor > [...]
  instrumentDate string
  pattern: ((1|2)\d{3}(0|1)\d{3})(:\d{2}:\d{2}:\d{2})?
  example: yyyyMMdd:HH:mm:ss:SSS or yyyyMMdd
  instrumentNumber > [...]
  mersminNumber > [...]
  mortgageConsideration Mortgage Consideration † > {...}
  nonRecordableIndicator > [...]
  notary > [...]
  number > [...]
  officeOfRecordationName > [...]
  pageNumber > [...]
  parties Parties > {...}
  priaSignature > [...]
  priaVersion > [...]
  property > [...]
  recordingDate > [...]
  recordingEndorsement Recording Endorsement † > {...}
  recordingJurisdictionName > [...]
  sequenceIdentifier > [...]
  stateOfRecordationName > [...]
  type* > [...]
  typeOtherDescription > [...]
  volumeNumber > [...]
}

```

PRIA DOCUMENT SCHEMA FOR instrumentDate

Parsed Street Address >

Parties >

Payment † >

```
Platted Land {
  additionalParcelDescription string
                             maxLength: 256
                             minLength: 0
  additionalParcelIdentifier string
                             maxLength: 32
                             minLength: 0
  appurtenanceDescription   > [...]
  appurtenanceIdentifier    > [...]
  buildingNumberIdentifier  > [...]
  platBookIdentifier        > [...]
  platCodeValue             > [...]
  platInstrumentNumber      > [...]
  platPageIdentifier        > [...]
  propertyBlockIdentifier   > [...]
  propertyCityTownIdentifier > [...]
  propertyLotIdentifier     > [...]
  propertySectionIdentifier > [...]
  propertySubdivisionIdentifier > [...]
  propertyTractIdentifier   > [...]
  sequenceIdentifier        > [...]
  type                     > [...]
  unitNumberIdentifier      > [...]
}
```

PLATTED LAND SCHEMA FOR additionalParcelIdentifier

INSTRUMENT DATE, PARCEL IDENTIFICATION NUMBER AND ADDITIONAL PARCEL IDENTIFIER XML EXAMPLE

```

<REQUEST_GROUP>
  <REQUESTING_PARTY/>
  <RECEIVING_PARTY_Name="CLRIS Portal"/>
  <SUBMITTING_PARTY_Name="Recorder's Office" _StreetAddress="55th St" _City="Sandyville" _State="IA" LoginAccountIdentifier="Rec" LoginAccountPassword="Rec">
    <CONTACT_DETAIL_Name="Sandie">
      <CONTACT_POINT_PreferenceIndicator="Y" _RoleType="Work" _Type="Phone" _Value="555-555-5555"/>
    </CONTACT_DETAIL>
  </SUBMITTING_PARTY>
  <REQUEST RequestDatetime="20240107:11:26:34">
    <KEY_Name="Originating Software" _Value="Document Maker"/>
    <KEY_Name="Originating Software Version Number" _Value="1.3.1"/>
    <KEY_Name="Authentication String" _Value="None"/>
    <KEY_Name="Submitting County" _Value="Jasper"/>
    <KEY_Name="UniqueCountyRequestID" _Value="123431452451234"/>
    <KEY_Name="CountyDocumentType" _Value="MORTGAGE"/>
    <PRIA_REQUEST_Type="Other" _TypeOtherDescription="ArchiveRecordedDocument" _NonRelatedDocumentsIndicator="N" SequenceIdentifier="1">
      <PACKAGE>
        <PRIA_DOCUMENT_Number="2024-2286" _Type="Mortgage" _BookNumber="" _InstrumentNumber="2024-2286" _OfficeOfRecordationName="Recorder" _PageNumber=""
        _RecordingDate="20240107:11:21:36:000" _CountyOfRecordationName="Jasper" _Code="8017868" _InstrumentDate="20240107">
          <GRANTOR_UnparsedName="SMITH,BOB A" _LastName="SMITH" _FirstName="BOB" _MiddleName="A" _NonPersonEntityIndicator="N"/>
          <GRANTOR_UnparsedName="SMITH,SUZY A" _LastName="SMITH" _FirstName="SUZY" _MiddleName="A" _NonPersonEntityIndicator="N"/>
          <GRANTEE_UnparsedName="CREDIT UNION" _LastName="" _FirstName="" _MiddleName="" _NonPersonEntityIndicator="Y"/>
          <PROPERTY_SequenceIdentifier="1">
            <_LEGAL_DESCRIPTION_TextDescription="BEGINNING at the northeast lot corner; thence S16 42 22 E, 100.00 feet; thence S33 14 40 W, 145.92 feet;
            thence S89 13 29 W, 156.01 feet; thence N16 42 22 W, 223.14 feet; thence 210.49 feet along a curve to the left having a radius of 542 feet to the POINT OF BEGINNING" _Type="MetesAndBounds">
              <_PARCEL_IDENTIFICATION_TypeIdentifier="ParcelIdentificationNumber" _NumberIdentifier="80-13051-2800-5" _Description="Lot 5"
              SequenceIdentifier="1"/>
            <PLATTED_LAND_AdditionalParcelIdentifier="W 130' OF THE S 1/2" _Type="Subdivision" PropertyCityTownIdentifier="Sandyville"
            PropertyLotIdentifier="5" PropertyBlockIdentifier="" PropertySubdivisionIdentifier="COUNTRY CLUB ADDITION"/>
            <_LEGAL_DESCRIPTION/>
          </PROPERTY>
          <PROPERTY_SequenceIdentifier="2">
            <_LEGAL_DESCRIPTION_TextDescription="BEGINNING at the northeast lot corner; thence S16 42 22 E, 200.00 feet; thence S33 14 40 W, 195.92 feet;
            thence S89 13 29 W, 186.01 feet; thence N16 42 22 W, 323.14 feet; thence 410.49 feet along a curve to the left having a radius of 642 feet to the POINT OF BEGINNING" _Type="MetesAndBounds">
              <_PARCEL_IDENTIFICATION_TypeIdentifier="ParcelIdentificationNumber" _NumberIdentifier="80-13051-2800-6" _Description="Lot 6"
              SequenceIdentifier="1"/>
            <PLATTED_LAND_AdditionalParcelIdentifier="E 130' OF THE N 1/2" _Type="Subdivision" PropertyCityTownIdentifier="Sandyville"
            PropertyLotIdentifier="6" PropertyBlockIdentifier="" PropertySubdivisionIdentifier="COUNTRY CLUB ADDITION"/>
          </PROPERTY>
        </PRIA_DOCUMENT>
      </PACKAGE>
    </PRIA_REQUEST>
  </REQUEST>
</REQUEST_GROUP>

```

```

                <UNPLATTED_LAND_MetesAndBoundsRemainingText="S96AC EXC PARCELS A/C" _QuarterQuarterSectionIdentifier="NE"
_QarterSectionIdentifier="W2" _SequencelIdentifier="1" _SectionIdentifier="35" _Type="GovernmentSurvey" PropertyRangeldentifier="43" PropertyTownshipIdentifier="100"/>
            </LEGAL_DESCRIPTION>
        </PROPERTY>
        <PARTIES>
            <_RETURN_TO_PARTY_UnparsedName="ESS Upload Service">
                <NON_PERSON_ENTITY_DETAIL/>
                <CONTACT_DETAIL/>
            </_RETURN_TO_PARTY>
            <_PREPARED_BY_PARTY_StreetAddress="PO BOX 434 1st Street" _UnparsedName="Sandyville Credit Union">
                <NON_PERSON_ENTITY_DETAIL/>
                <CONTACT_DETAIL/>
            </_PREPARED_BY_PARTY>
        </PARTIES>
        <EXECUTION/>
        <RECORDING_ENDORSEMENT_TotalRealEstateValue="70000.00">
            <VOLUME_PAGE/>
        </RECORDING_ENDORSEMENT>
        <EMBEDDED_FILE_EncodingType="B64Encode" _MIMEType="TIFF" _Name="Mortgage.tif" _NumberOfPages="6" _SequencelIdentifier="1" _Type="TiffMaker"
_Version="6.0">
            <DOCUMENT/>
            </EMBEDDED_FILE>
        </PRIA_DOCUMENT>
    </PACKAGE>
</PRIA_REQUEST>
</REQUEST>
</REQUEST_GROUP>

```

**INSTRUMENT DATE, PARCEL IDENTIFICATION NUMBER AND
ADDITIONAL PARCEL IDENTIFIER JSON EXAMPLE**

```
{
  "request": {
    "receivingParty": {
      "name": "CLRIS Portal"
    },
    "submittingParty": {
      "name": "Recorder's Office",
      "streetAddress": "55th St",
      "city": "Sandyville",
      "state": "IA",
      "loginAccountIdentifier": "Rec",
      "contactDetail": {
        "name": "Sandie",
        "contactPoint": {
          "preferenceIndicator": "Y",
          "roleType": "Work",
          "type": "Phone",
          "value": "555-555-5555"
        }
      }
    }
  },
  "requestDatetime": "20240107:11:26:34",
  "key": [
    {
      "name": "UniqueCountyRequestID",
      "value": "123431452451234"
    },
    {
      "name": "CountyDocumentType",
      "value": "MORTGAGE"
    }
  ],
  "priaRequest": {
    "type": "Other",
    "typeOtherDescription": "ArchiveRecordedDocument",
    "nonRelatedDocumentsIndicator": "N",
    "sequenceIdentifier": "1",
    "package": {
      "priaDocument": {
        "number": "2024-2286",
        "type": "Mortgage",
        "instrumentNumber": "2024-2286",
        "officeOfRecordationName": "Recorder",
        "recordingDate": "20240107:11:21:36:000",
        "countyOfRecordationName": "Jasper",
        "code": "8017868",
        "instrumentDate": "20240107"
      },
      "grantor": [
        {
          "unparsedName": "SMITH,BOB A",
          "lastName": "SMITH",
          "firstName": "BOB",
          "middleName": "A",
          "nonPersonEntityIndicator": "N"
        },
        {
          "unparsedName": "SMITH,SUZY A",
          "lastName": "SMITH",
          "firstName": "SUZY",
          "middleName": "A",
          "nonPersonEntityIndicator": "N"
        }
      ],
      "grantee": [
        {
          "unparsedName": "CREDIT UNION",
          "nonPersonEntityIndicator": "Y"
        }
      ],
      "property": [
        {
          "sequenceIdentifier": "1",
          "county": "Jasper",
          "legalDescription": {
```

"textDescription": "BEGINNING at the northeast lot corner; thence S16 42 22 E, 100.00 feet; thence S33 14 40 W, 145.92 feet; thence S89 13 29 W, 156.01 feet; thence N16 42 22 W, 223.14 feet; thence 210.49 feet along a curve to the left having a radius of 542 feet to the POINT OF BEGINNING",

"type": "MetesAndBounds",

"parcelIdentification": [

{

"typeIdentifier": "ParcelIdentificationNumber",

"numberIdentifier": "80-13051-2800-5",

"description": "Lot 5",

"sequenceIdentifier": "1"

}

],

"plattedLand": [

{

"additionalParcelIdentifier": "W 130' OF THE S 1/2",

"type": "Subdivision",

"propertyCityTownIdentifier": "Sandyville",

"propertyLotIdentifier": "5",

"propertySubdivisionIdentifier": "COUNTRY CLUB ADDITION",

}

]

},

{

"sequenceIdentifier": "2",

"county": "Jasper",

"legalDescription": {

"textDescription": "BEGINNING at the northeast lot corner; thence S16 42 22 E, 200.00 feet; thence S33 14 40 W, 195.92 feet; thence S89 13 29 W, 186.01 feet; thence N16 42 22 W, 323.14 feet; thence 410.49 feet along a curve to the left having a radius of 642 feet to the POINT OF BEGINNING",

"type": "MetesAndBounds",

"parcelIdentification": [

{

"typeIdentifier": "ParcelIdentificationNumber",

"numberIdentifier": "80-13051-2800-6",

"description": "Lot 6",

"sequenceIdentifier": "1"

}

],

"plattedLand": [

{

"additionalParcelIdentifier": "E 130' OF THE N 1/2",

"type": "Subdivision",

"propertyCityTownIdentifier": "Sandyville",

"propertyLotIdentifier": "6",

"propertySubdivisionIdentifier": "COUNTRY CLUB ADDITION"

}

],

"unplattedLand": [

{

"metesAndBoundsRemainingText": "S96AC EXC PARCELS A/C",

"quarterQuarterSectionIdentifier": "NE",

"quarterSectionIdentifier": "W2",

"sequenceIdentifier": "1",

"sectionIdentifier": "35",

"type": "GovernmentSurvey",

"propertyRangeIdentifier": "43",

"propertyTownshipIdentifier": "100"

}

]

},

"parties": {

"returnToParty": [

{

"unparsedName": "ESS Upload Service"

}

],

"preparedByParty": [

{

"streetAddress": "PO BOX 434 1st Street",

"unparsedName": "Sandyville Credit Union"

}

]

},

```
"recordingEndorsement": {
  "totalRealEstateValue": "70000"
},
"embeddedFile": [
  {
    "encodingType": "B64Encode",
    "mimeType": "TIFF",
    "name": "Mortgage.tif",
    "numberOfPages": "6",
    "sequenceIdentifier": "1",
    "type": "TiffMaker",
    "version": "6"
  }
]
}
}
}
}
```

NOTIFICATION SERVICES

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	XYZ Contracting	082121	Jasper	Mortgage	
Name 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

BACK THE BLUE

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. Notwithstanding the foregoing, an Eligible Professional shall be authorized to disclose any shielded information when such disclosure is done for a legitimate business purpose including, but not limited to, the provision of services related to a real estate transaction.

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

HISTORIC UNRECORDED SURVEYS

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.

USER ACCOUNTS AND USER NAMES

Chapter 7

Terms of Service and Privacy Policies

ESS – 7.1 Definitions.

(Iowa Code Section 331.604, 3(a))

As used in this Chapter:

Abandoned Documents – Any number of associated E-Submission documents within an E-Submission group which have not been submitted or completed within 30 days after the creation of the E-Submission group.

ESS Central Authentication Service - An enterprise single sign-on authentication and authorization platform used by the Electronic Services System (ESS) to enable authorized users to log in and access services and information provided by ESS such as the Search and E-Submission applications.

Internet Protocol Address (IP address) – A numerical label assigned to each device (e.g., computer, printer) participating in a computer network that uses the Internet Protocol for communication.

Iowa Land Records Search Application – The county land record information website for searching and retrieving information about recorded documents and related services. The website address is <https://iowalandrecords.org> or <https://iowalandrecords.org/cas/login>.

Iowa Land Records E-Submission Service – The county land record information website for submitting documents to Iowa counties for recording. The website address is <https://iowalandrecords.org> or <https://iowalandrecords.org/cas/login>.

Site Administrator – The Electronic Services System Project Manager, or a designated employee of the Electronic Services System.

User In Good Standing – An organization, an organization user or a registered individual user who is in compliance with the ESS Terms of Service and who has not or is not likely to be engaged in activities which are prohibited by these Terms of Service including but not limited to the activities enumerated in Section 7.8 (2)

Section 7.1 revised 10.10.12.

Section 7.1 revised 11.14.12.

Section 7.1 revised 8.10.21.

Section 7.1 revised 5.9.23.

Section 7.1 revised 8.8.23.

ESS – 7.2 Authority and Purpose.

(Iowa Code Section 331.604, 3(a))

7.2(1) The Electronic Services System (ESS) is required to implement electronic recording in each county, and to maintain a statewide internet website to provide electronic access to records and information. In order to ensure the successful operation of the county land record information system and to fulfill the requirements of Iowa law concerning the handling of personally identifiable information, it is necessary to establish and publish appropriate Terms of Service and Privacy policies as authorized under Iowa Code Section 22.2, subsection 4a. These policies apply to all persons and organizations that access information or engage in electronic recording activities at websites published by the Electronic Services System and the county land record information system.

ESS – 7.3 Iowa Land Records Search Application Terms of Service.

(Iowa Code Section 331.604, 3(a))

Terms of Service - Disclaimer

The information contained herein is provided as a service to the public for informational purposes only and no representation is made as to its accuracy or fitness for any particular purpose. The Iowa Land Records system, also known as the County Land Record Information System, is not intended to replace a search of the official records maintained in the office of the County Recorder. The Electronic Services System and its agents hereby disclaim any and all liability from or related to the use of the information contained in the Iowa Land Records system, or the County Land Record Information System. Under Iowa law, the Electronic Services System is the sole owner of its compiled and developed information. None of the content or information contained on this website or any part thereof, including any information, products and/or software related to the materials, may be compiled, bundled, grouped, reproduced, shared, transmitted, transcribed, stored in a retrieval system, or translated into any language in any form by any means without the express written permission of the Electronic Services System. Organizations and users of this website are granted a limited license to access the content or information made available on this website. No organization or user or any other party is permitted to sell, share, transfer, loan, license or market the materials or to engage in any similar transaction related to the materials contained on this website to any extent under any circumstances. The Electronic Services System provides any and all materials and other information and/or software distributed on this website “as is” without warranty of any kind, either express or implied, including but not limited to, the implied warranties or conditions of merchantability or fitness for a particular purpose. In no event shall the Electronic Services System be liable for any loss of profits, lost business, loss of use of data, interruption of business, or for indirect, special, incidental, or consequential damages of any kind. The Electronic Services System may revise the Terms of Service of its website from time to time without notices other than posting on its website.

The performance of this website and all information contained on, downloaded or accessed from this website are provided on an "as is" basis, without warranties of any kind whatsoever, including any implied warranties or warranties of merchantability, fitness for a particular purpose or non-infringement of the rights of third parties. The Electronic Services System shall be not responsible for any problems or technical malfunction of any communications network or lines, computer online systems, servers, Internet access providers, computer equipment, software, or any combination thereof including any injury or damage to an organization or user or any other person's computer as a result of using this website.

As a registered organization or user or unregistered user of <https://iowalandrecords.org> and related extensions, an organization or user acknowledges and agrees that any reliance on or use by the organization or user of any information available on this website shall be entirely at their own risk. In no event shall the Electronic Services System nor any of its service providers be liable for any direct, indirect, consequential or exemplary damages arising from the use or the performance of this website, even if the Electronic Services System or such provider has been advised of the possibility of such damages.

Each registered organization shall ensure that the users who are accessing the website, through user accounts managed by the organization, conform to these Terms of Service.

An organization or user at <https://iowalandrecords.org> shall maintain accurate user account information concerning their identity including a first and last name, organization name, role, mailing address, e-mail address and telephone number.

Organizations and user accounts and their associated IP addresses which are deemed to be a fictitious identity or impersonation, or created to circumvent these Terms of Service may be temporarily or permanently blocked and/or blacklisted.

If the organization or user account information is not maintained or if the information is inaccurate, or if organization or user account is deemed inactive by a Site Administrator, the user account(s) will be deactivated and will no longer be permitted to access information posted at <https://iowalandrecords.org>.

As a registered organization or user of the Iowa Land Records system at <https://iowalandrecords.org>, the organization or user acknowledges and agrees that e-mail is an acceptable means of communication, and the organization or user agrees to accept and whitelist e-mails from either iowalandrecords.org or clris.com and shall not block e-mails originating from these sources. Newsletters and service announcements are delivered through a recognized third-party service provider - mailchimp.com, and communications from this source shall also be accepted.

If an organization or user wishes to participate in a web conference or other event hosted by the Iowa Land Records system, the organization or user shall provide accurate information concerning their identity including but not limited to the organization name or first and last name. If the information is not accurate or if the information is incomplete (such as providing a first name only), then the organization or user will not be permitted to have access to the conference or event.

The Iowa Land Records newsletter and other communications distributed by e-mail will comply with the requirements of the CAN-SPAM Act, and the organization or user may submit a request to "opt-out" of the e-mail distribution list. However, if the organization or user submits an opt-out request to Iowa Land Records concerning any newsletter, service announcement or other communication distributed via e-mail, or if we are unable to communicate with the organization or user via e-mail for any reason, the organization and user account(s) will be **deactivated**, and the organization or user will no longer be permitted to access information posted at <https://iowalandrecords.org>. If the organization or user has a question or comment about this policy, please send an inquiry by email to support@clris.com.

No Unlawful or Prohibited Use

As a condition of the use of the iowalandrecords.org and related extensions (websites), an organization or user will not use the website for any purpose that is unlawful or prohibited by these terms, conditions, and notices. An organization or user may not use the website in any manner that could damage, disable, overburden, or impair any Electronic Services System server, or the network(s) connected to any Electronic Services System server, or interfere with any other party's use and enjoyment of the website. The maximum number of document images which may be viewed or downloaded by an organization user shall not exceed 120 documents per day, except when authorized by a Site Administrator. This limitation will be programmatically enforced. Permission to view more than 120 documents per day per organization user may be granted to organization users in good standing on a case-by-case basis. Such permission may be denied or revoked by a Site Administrator as provided in Section 7.8(2).

The maximum number of document images which may be viewed or downloaded by a registered individual user shall not exceed 10 documents per day, except when authorized by a Site Administrator. This limitation will be programmatically enforced. Permission to view more than 10 documents per day per registered individual user may be granted to registered users in good standing on a case-by-case basis. Such permission may be denied or revoked by a Site Administrator for any reason as provided in Section 7.8(2).

Organization or user accounts and their associated IP addresses, which are deemed to be created to circumvent the daily document image limitations may be temporarily or permanently blocked and/or blacklisted.

An organization or user may not attempt to gain unauthorized access to the website, other accounts, computer systems or networks connected to any Electronic Services System server or to any of the services or information provided, through hacking, password mining, artificial intelligence (AI) or any other means. An organization or user may not obtain or attempt to obtain any content or information through any means not intentionally made available through the website.

Access to the website through an IP address located outside of the United States is prohibited except when authorized by a Site Administrator. Permission for access through foreign IP addresses may be granted to a User In Good Standing on a case-by-case basis. Such permission may be revoked by a Site Administrator.

Organization or user accounts and their associated IP addresses which are deemed to be created to circumvent the foreign access prohibition may be temporarily or permanently blocked and/or blacklisted.

Illegal and/or unauthorized uses of the website, including, but not limited to, unauthorized framing of or linking to the website, or unauthorized use of any robot, spider or other automated device on the website, will be investigated and appropriate legal action will be taken, including without limitation civil, criminal and injunctive redress.

Organization or user accounts and their associated IP addresses which are deemed to be created to circumvent the policies prohibiting illegal or unauthorized uses may be temporarily or permanently blocked and/or blacklisted.

If an organization or user violates these Terms of Service, the Electronic Services System may bar the organization or user from future use of the website and/or take appropriate legal action. The laws of the State of Iowa shall govern and determine all matters arising out of or in connection with the Terms of Service. Any and all litigation or actions commenced in connection with this agreement, including after expiration or termination of this agreement, shall be brought in Des Moines, Iowa, in Polk County District Court for the State of Iowa, if jurisdiction is proper. However, if jurisdiction is not proper in the Iowa District Court, Polk County, but is proper only in a United States District Court, the matter shall be commenced in the United States District Court for the Southern District of Iowa.

Historical Index and Images

The Iowa Land Record indexes have been replicated from the official indexes in each county. The Iowa Land Record images have been replicated from the official image systems in each county. In some cases, the indexes and images have been modified to comply with standards established by the Electronic Services System including standards for document types, a standard format for party names,

standards for other indexed information, and a standard document image format. The County Recorder indexes and images are the official indexes and images in any and all cases where there is an inconsistency.

As provided in Section 331.606A (Iowa Code), Iowa Land Records and the Electronic Services System have implemented a system for redacting personally identifiable information from document images. "Personally identifiable information" means one or more of the following specific unique identifiers when combined with an individual's name:

- (1) Social security number.
- (2) Checking, savings, or share account number, credit, debit, or charge card number.

Driver license information is also being redacted from document images.

Every reasonable measure is taken to redact personally identifiable information from document images before they are posted for public access through Iowa Land Records. However, no redaction system has been shown to be completely accurate. Because it is possible that some personally identifiable information may be unintentionally visible in a document image, all users of the website have the responsibility to help protect the privacy of persons whose records may be displayed.

Any personally identifiable information which may be found on any image posted on this website is considered to be confidential. In the event that an organization or user discovers any personally identifiable information posted on the Iowa Land Records system, as a condition for being an authorized organization or user of the website, the organization or user has the responsibility to immediately notify Iowa Land Records so that the information can be restricted or redacted. Additionally, each organization or user of the website is expressly prohibited from distributing, sharing, or publicizing any personally identifiable information which may be found. Personally identifiable information may be reported by using the "Error" button located on a search results page on the website, or by sending a message to support@clris.com."

Products

Any product mentioned on this website is mentioned for identification purposes only. Product names appearing in any content or information on the website may or may not be registered trademarks or copyrights of their respective companies.

Links to External Sites

Iowa Land Records includes links to websites not under the control of the Electronic Services System. The Electronic Services System does not have control of these other websites and is not responsible for the contents of any website outside of the iowalandrecords.org domain, any domain contained in a

linked website, or any changes or updates to such websites. The Electronic Services System provides these links only as a convenience and is not an endorsement by the Electronic Services System.

The Iowa Land Records website is configured to operate with various web browsers including Microsoft Edge, Firefox and Google Chrome. Users should send an inquiry by email to support@clris.com concerning any compatibility issues with web browsers. Internet Explorer is not recommended. Users are advised to install the most recent updates to Adobe Acrobat Reader.

Copyright Notice

Copyright © [date] Electronic Services System, 8711 Windsor Parkway Suite 2, Johnston, IA 50131.

Any and all rights not expressly granted herein are reserved in their entirety. If an organization or user has a question or comment concerning this website, send an inquiry by email to support@clris.com.

Section 7.3 revised 10.10.12.

Section 7.3 revised 4.10.13.

Section 7.3 revised 11.8.18.

Section 7.3 revised 8.10.21.

Section 7.3 revised 5.9.23.

Section 7.3 revised 8.8.23.

ESS – 7.4 Iowa Land Records Search Application Privacy Policy.

(Iowa Code Section 331.604, 3(a))

Privacy Notice

Iowa Land Records understands issues concerning the handling of information about authorized organizations and users. This notice describes our privacy policy. By visiting Iowa Land Records (iowalandrecords.org or related websites), the organization and user are accepting the practices described in this Privacy Notice.

What Personal Information About Registered Organizations and Users and Does Iowa Land Records Gather?

The information we learn from organizations and users helps us personalize and continually improve the experience of using Iowa Land Records. Here are the types of information we gather.

- **Information Given To Us:** We receive and store any information entered on the website or given to us in any other way. The information is provided when the organization registers and sets up user accounts. An organization may choose not to provide certain information, but then the organization and user might not be able to take advantage of many features of the website. We use the information that is provided for such purposes as responding to requests, customizing future services, communicating, and generally monitoring the use of the website and system. Examples of the information we collect and analyze include the Internet Protocol (IP) address used to connect a computer to the Internet; login; e-mail address; password; computer and connection information such as browser type and version, operating system, and platform. During some visits we may use software tools such as JavaScript to measure and collect session information, including information about search activities.
- **Automatic Information:** We receive and store certain types of information whenever an organization or user interacts with us. For example, like many websites, we use "cookies," and we obtain certain types of information when a Web browser accesses Iowa Land Records.
- **E-mail Communications:** To help us make e-mails more useful and interesting, we often receive a confirmation when an organization or user opens an e-mail from Iowa Land Records if a computer supports such capabilities.
- **Information from Other Sources:** We might receive information about an organization or user from other sources and add it to our account information. Examples of information we receive from other sources include updated delivery and address information from our carriers or

other third parties which we use to correct our records, or credit history information from credit bureaus, which we may use to help prevent and detect fraud.

Does Iowa Land Records Share the Information It Receives?

Information about our registered organizations or users is important to us, and we are not in the business of selling it to others. We share organization or user information only as described below.

- **Agents:** We employ other companies, organizations and individuals to perform functions on our behalf. Examples include fulfilling orders, delivering packages, sending postal mail and e-mail, removing repetitive information from customer lists, analyzing data, processing credit/debit card payments, and providing customer service. They have access to customer and user information needed to perform their functions, but may not use it for other purposes.
- **Protection of Iowa Land Records and Others:** We release account and other organization and user information when we believe release is appropriate to comply with the law; enforce or apply our Terms of Service and other agreements; or protect the rights, property, or safety of Iowa Land Records, our users, or others. This includes exchanging information with other companies and organizations for fraud protection and credit risk reduction. This does not include selling, renting, sharing, or otherwise disclosing personally identifiable information from customers or users for commercial purposes in violation of the commitments set forth in this Privacy Notice.
- **With Consent:** Other than as set out above, the organization or user will receive notice when information about the organization or user might go to third parties, and the organization or user will have an opportunity to choose not to share the information.

How Secure Is Information About Organizations or Users?

We work to protect the security of organization or user information. It is important for organizations or users to protect against unauthorized access to an organization's or user's password and computer. Be sure to sign off when finished using a shared computer.

Which Information Can We Access?

Iowa Land Records gives organizations or users access to a range of information about their account and the interactions with Iowa Land Records for the limited purpose of viewing and, in certain cases, updating that information.

What Choices Do We Have?

As discussed above, organizations or users can always choose not to provide information, even though it might be needed to take advantage of some Iowa Land Records features. An organization or user can add or update certain information about their account. When account information is updated, we may keep a copy of the prior version for our records.

Terms of Service, Notices, and Revisions

If an organization or user chooses to visit Iowa Land Records, the visit and any dispute over privacy is subject to this Notice and our Terms of Service, including limitations on damages, arbitration of disputes, and application of the laws of the State of Iowa. If an organization or user has any concern about privacy at Iowa Land Records, please contact us with a thorough description, and we will try to resolve it.

Our activities and services change constantly, and our Privacy Notice and the Terms of Service will change also. We may e-mail periodic reminders of our notices and conditions, but an organization or user should check the website frequently to see recent changes. Unless stated otherwise, our current Privacy Notice applies to all information that we have about an organization, user or account. We stand behind the promises we make, however, and will never materially change our policies and practices to make them less protective of customer information collected in the past without the consent of affected customers.

Privacy Policy Scope

This Privacy Notice addresses the handling of information about registered organizations and users and customers of the Iowa Land Records Search Application (iowalandrecords.org and related websites). These policies do not address privacy issues concerning personally identifiable information which may be embedded within document images. See Section 331.606A (Iowa Code). Policies relating to personally identifiable information are incorporated within the Terms of Service.

Section 7.4 revised 11.8.18.
Section 7.4 revised 5.9.23.

ESS – 7.5 Iowa Land Records E-Submission Service Terms of Service.

(Iowa Code Section 331.604, 3(a))

Terms of Service

Each registered organization and user represents and warrants that they agree that the user identification and authentication procedures implemented by the Iowa Land Records Electronic Submission Service, i.e., a user ID and password, is a valid electronic signature under Section 554D.103 of the Iowa Code, and that it is legally recognized as a signature under Section 554D.108.

Each registered organization and user agrees that submission of a document through the Iowa Land Records Electronic Submission Service is equivalent to delivery of a physical document through the U.S. mail, courier service or over-the-counter at designated offices in each county or jurisdiction. Organizations and users agree that a County Recorder or other designee may correct any index information submitted which may be in error or which may require clarification. Organizations and users agree that the Iowa Land Records E-Submission Service or a Site Administrator may modify the format or scale of a scanned or rendered electronic document, without altering the content of the electronic document, in order to conform to standards established by the Electronic Services System. Organizations and users agree that a County Recorder or a Site Administrator may delete or otherwise remove Abandoned Documents from the Iowa Land Records Electronic Submission Service.

Organizations and users agree that they are responsible for assuring that documents submitted through the Iowa Land Records Electronic Submission Service are valid and comply with all legal requirements and requirements for recording. Organizations and users agree that electronic documents submitted through the Iowa Land Records Electronic Submission Service have been properly executed by the parties and represent the agreement of the parties.

Organizations and users accept and agree to make payment of due and proper recording and related online service fees through the payment services system specified by the Iowa Land Records Electronic Submission Service, and further agree that the Iowa Land Records Electronic Submission Service may suspend services for failure to make payment or to maintain current payment information as required.

A registered organization or user, when acting as a Surveyor Company or Surveyor as defined in Section 3.1, shall comply with the minimum standards for property surveys as described in Section 193C, Chapter 11 of the Iowa Administrative Code, and with the code of professional conduct as described in Section 193C, Chapter 8 of the Iowa Administrative Code. A Surveyor Company or Surveyor shall, when submitting corner certificates or surveys and plats as electronic documents for recording, comply with the requirements for surveys and

plats as specified in Section 3.13 (6-7) of the ESS Policies and Procedures, and with the electronic document formatting requirements specified in Section 5.4 of the ESS Policies and Procedures. Additionally, a registered organization or user acting as a Surveyor Company or Surveyor shall ensure that any survey or plat has been reviewed and approved by any city or county jurisdiction, when such review and approval is required, prior to submitting the survey or plat through the Iowa Land Records E-Submission Service.

Each participating county and county recorder represents and warrants that they agree that the user identification and authentication procedures implemented by the Iowa Land Records Electronic Submission Service, i.e., a user ID and password, is a valid electronic signature under Section 554D.103 of the Iowa Code, and that it is legally recognized as a signature under Section 554D.108. Each participating county and county recorder agrees that submission of a document through the Iowa Land Records Electronic Submission Service is equivalent to delivery of a document through the U.S. mail, courier service or over-the-counter at designated offices in each county or jurisdiction.

The Electronic Services System provides any and all materials and other information and/or software distributed on this website "as is" without warranty of any kind, either express or implied, including but not limited to, the implied warranties or conditions of merchantability or fitness for a particular purpose. In no event shall the Electronic Services System be liable for any loss of profits, lost business, loss of use of data, interruption of business, or for indirect, special, incidental, or consequential damages of any kind. The Electronic Services System may revise the Terms of Service of its website from time to time without notice other than posting on its website. The performance of this website and all information contained on, downloaded or accessed from this website are provided on an "as is" basis, without warranties of any kind whatsoever, including any implied warranties or warranties of merchantability, fitness for a particular purpose or non-infringement of the rights of third parties. The Electronic Services System shall be not responsible for any problems or technical malfunction of any communications network or lines, computer online systems, servers, Internet access providers, computer equipment, software, or any combination thereof including any injury or damage to an organization or user or any other person's computer as a result of using this website.

As a registered user of the Iowa Land Records E-Submission Service at <https://iowalandrecords.org>, an organization or user acknowledges and agrees that any reliance on or use of any information available on this website shall be entirely at the organization's or the user's own risk. In no event shall the Electronic Services System nor any of its service providers be liable for any direct, indirect, consequential or exemplary damages arising from the use or the performance of this website, even if the Electronic Services System or such provider has been advised of the possibility of such damages.

No Unlawful or Prohibited Use

As a condition of the use of the Iowa Land Records E-Submission Service, an organization or user will not use the Service for any purpose that is unlawful or prohibited by these terms, conditions, and notices. An organization or user may not use the Iowa Land Records E-Submission Service in any manner that could damage, disable, overburden, or impair any Electronic Services System server, or the network(s) connected to any Electronic Services System server, or interfere with any other party's use and enjoyment of any Services.

An organization or user may not attempt to gain unauthorized access to any services, other accounts, computer systems or networks connected to any Electronic Services System server or to any of the Services, through hacking, password mining or any other means. An organization or user may not obtain or attempt to obtain any materials or information through any means not intentionally made available through the services. Illegal and/or unauthorized uses of the website, including, but not limited to, unauthorized framing of or linking to the website, or unauthorized use of any robot, spider or other automated device on the website, will be investigated and appropriate legal action will be taken, including without limitation civil, criminal and injunctive redress. If an organization or user violates these Terms of Service, the Electronic Services System may terminate the organization's or user's use of the website, bar the organization or user from future use of the website and/or take appropriate legal action against the organization or user. The laws of the State of Iowa shall govern and determine all matters arising out of or in connection with the Terms of Service. Any and all litigation or actions commenced in connection with this Agreement, including after expiration or termination of this Agreement, shall be brought in Des Moines, Iowa, in Polk County District Court for the State of Iowa, if jurisdiction is proper. However, if jurisdiction is not proper in the Iowa District Court, Polk County, but is proper only in a United States District Court, the matter shall be commenced in the United States District Court for the Southern District of Iowa.

Products

Any product mentioned on this website is mentioned for identification purposes only. Product names appearing in this material may or may not be registered trademarks or copyrights of their respective companies.

Links to External Sites

Iowa Land Records includes links to websites not under the control of the Electronic Services System. The Electronic Services System does not have control of these other websites and is not responsible for the contents of any website outside of the Iowa Land Records E-Submission Service (iowalandrecords.org) or any domain contained in a linked website, or any changes or updates to such websites. The Electronic Services System provides

these links only as a convenience and is not an endorsement by the Electronic Services System.

Copyright Notice

Copyright [date] Electronic Services System, 8711 Windsor Parkway Suite 2, Johnston, IA 50131.

For more information send an inquiry by email to support@clris.com. Any and all rights not expressly granted herein are reserved in their entirety. Contact support@clris.com if there are any questions or problems with this website.

Section 7.5 revised 10.10.12.
Section 7.5 revised 11.14.12.
Section 7.5 revised 8.9.16.
Section 7.5 revised 11.8.18.
Section 7.5 revised 8.10.21.
Section 7.5 revised 5.9.23.
Section 7.5 revised 11.9.23.

ESS – 7.6 Iowa Land Records E-Submission Service Privacy Policy.

(Iowa Code Section 331.604, 3(a))

Privacy Notice

This notice describes our privacy policy. By using the Iowa Land Records E-Submission Service, the organization or user accepts the practices described in this Privacy Notice.

What Personal Information About Customers Does the Iowa Land Records E-Submission Service Gather? The information we learn from customers helps us personalize and continually improve services. Here are the types of information we gather.

- **Information Given To ESS:** We receive and store any information entered on our website or given to us in any other way. An organization or user can choose not to provide certain information, but then the organization or user might not be able to take advantage of some system features. We use the provided information for such purposes as responding to requests, customizing future services, and communications.
- **Automatic Information:** We receive and store certain types of information whenever there is an interaction with ESS systems. For example, like many websites, ESS may use "cookies," and we can obtain certain types of information when a web browser accesses the Iowa Land Records E-Submission Service.
- **E-mail Communications:** To help make e-mails more useful and interesting, ESS may receive a confirmation when an e-mail from the Iowa Land Records E-Submission Service is opened.
- **Information from Other Sources:** ESS may receive information about an organization or user from other sources and add it to our account information.

Does Iowa Land Records Share the Information It Receives? Information about our customers is important to us, and we are not in the business of selling it to others. We share customer information only as described below.

- **Agents:** We employ other companies and individuals to perform functions on our behalf. Examples include fulfilling orders, delivering packages, sending postal mail and e-mail, removing repetitive information from customer lists, analyzing data, processing credit card payments, and providing customer service. They have access to personal information needed to perform their functions, but may not use it for other purposes.

- Protection of the Iowa Land Records E-Submission Service and Others: We release account and other personal information when we believe release is appropriate to comply with the law; enforce or apply our Terms of Service and other agreements; or protect the rights, property, or safety of the Iowa Land Records E-Submission Service, our users, or others. This includes exchanging information with other companies and organizations for fraud protection and credit risk reduction. This does not include selling, renting, sharing, or otherwise disclosing personally identifiable information from customers for commercial purposes in violation of the commitments set forth in this Privacy Notice.
- With Consent: Other than as set out above, an organization or user will receive notice when information might go to third parties, and there will be an opportunity to choose not to share the information.

How Secure Is Information? We work to protect the security of information during transmission by using Secure Sockets Layer (SSL) software, which encrypts information. We reveal only the last four digits of credit card numbers when confirming account activity. Of course, we transmit the entire credit card number to the appropriate credit card company during order processing. It is important for an organization or user to protect against unauthorized access to password information and devices. Be sure to sign off when finished using a shared computer.

Which Information Can Be Accessed? The Iowa Land Records E-Submission Service gives access to a broad range of information about an organization's or user's account and their interactions with the Iowa Land Records E-Submission Service for the limited purpose of viewing and, in certain cases, updating their information.

What Choices Are There? As discussed above, an organization or user can always choose not to provide information, even though it might be needed to take advantage of some of the Iowa Land Records E-Submission Service features. Certain information about an account can be updated by the organization or user. When information is updated, we may keep a copy of the prior version for our records.

Terms of Service, Notices, and Revisions. If an organization or user chooses to use the Iowa Land Records E-Submission Service, any activity and any dispute over privacy is subject to this Notice and our Terms of Service, including limitations on damages, arbitration of disputes, and application of the law of the State of Iowa. If there are any concerns about privacy at the Iowa Land Records E-Submission Service, please contact us with a thorough description, and we will try to resolve it.

Our activities and services change constantly, and our Privacy Notice and the Terms of Service will change also. We may e-mail periodic reminders of our notices and conditions, but organizations and users should check our website frequently to see recent changes. Unless stated otherwise, our current Privacy Notice applies to all information that we have about organizations and users and their accounts. We stand behind the promises we make, however, and will never materially change our policies and practices to make them less protective of customer information collected in the past without the consent of affected customers.

Information Given To ESS. Most such information is provided when registering, setting up a payment account, or communicating with customer service. For example, an organization or user may provide information when communicating with us by phone or e-mail, or when a questionnaire is completed. As a result of those actions, information such as a name, address, and phone number, credit card information, e-mail addresses and other information may be given to ESS.

Automatic Information. Examples of the information we collect and analyze include the Internet protocol (IP) address used to connect a computer to the Internet; login; e-mail address; password; computer and connection information such as browser type and version, operating system, and platform; and account history. During some visits we may use software tools such as JavaScript to measure and collect session information, including transaction activities.

Information from Other Sources. Examples of information we receive from other sources include updated delivery and address information from our carriers or other third parties, which we use to correct our records; account information, purchase information, and credit history information from credit bureaus, which we use to help prevent and detect fraud and to offer certain credit or financial services to some customers.

Information That Can Be Accessed By Organizations and Users. Examples of information that can be accessed easily at the Iowa Land Records E-Submission Service include up-to-date information regarding recent account activity; and personally identifiable information (including name, e-mail, password; payment settings (including credit card information and account balances).

Section 7.6 revised 11.8.18.

Section 7.6 revised 5.9.23.

ESS – 7.7 Iowa Land Records Application Procedures

(Iowa Code Section 331.604, 3(a))

7.7 (1) The purpose of this policy is to clarify the process for determining whether to grant an organization and user access to the Iowa Land Records Search application or the Iowa Land Records E-Submission service. As provided in Sections 7.3 and 7.5, an organization or user must be registered with the Electronic Services System and Iowa Land Records. Registration is conducted through an application form for organizations (<https://iowalandrecords.org/ess-business-application/>) or individuals (<https://iowalandrecords.org/ess-individual-search-application/>).

7.7 (2) When applying for access to the Iowa Land Records Search application or the Iowa Land Records E-Submission Service, organizations are required to provide accurate user account information concerning their identity including a first and last name, organization name, mailing address, e-mail address and telephone number. When possible, an organization web address and an organization's official business registration identification or Trade Name is requested. The use of false or fictitious information is prohibited. Organizations are required to explicitly request access to the service by marking the designated choices on the application form. They are required to explicitly agree and certify that the information submitted is complete and accurate, and they are required to explicitly acknowledge and accept the Electronic Services System Terms of Service.

7.7 (3) The Electronic Services System including its officials, employees and contractors reserves the right to verify and validate the information provided by an organization or user on the application form. Verification may include a review of government issued identification documents such as a passport or a REAL ID (<https://www.dhs.gov/real-id>). Further, the Electronic Services System reserves the right to conduct a review of the background of an organization to determine whether the applicant has or may be likely to engage in activities which are prohibited by these Terms of Service.

7.7 (4) The Electronic Services System reserves the right to decline any application and to deny access to an applicant for any of the following reasons.

- a) The applicant has submitted false, fictitious, or misleading information in an application for access
- b) The business registration information or Trade Name information is false, incomplete or inaccurate
- c) ESS is unable to authenticate the identity an organization or individual
- d) ESS believes that the applicant has or may engage in false, fraudulent, illegal or unauthorized activity based on their background and history including but not limited to their use of a legacy application such as <https://iowalandrecords.org/portal>

- e) ESS determines that the applicant is or is likely to be engaged in prohibited activity such as the commercial use of any content or information made available through the ESS website and services. Prohibited activities include selling, sharing, transferring or marketing the content or information provided through ESS website and services, or engaging in any similar service or transaction related to the materials provided through ESS website and services to any extent under any circumstances

7.7 (5) If the Electronic Services System declines an application and denies access to Iowa Land Records Search application or the Iowa Land Records E-Submission service, notice shall be provided to the requested organization administrator or individual user via email. Such notice will be provided within seven business days following a decision and the notice will specify the reasons for denying access. An applicant may appeal a decision to decline an application and deny access. An appeal shall be submitted via email to support@clris.com. An appeal will be directed to a designated ESS Site Administrator, who shall determine whether access to Iowa Land Records services will be granted or denied.

Section 7.7 adopted 8.8.23.
Section 7.7 revised 11.9.23.

ESS – 7.8 Iowa Land Records Access Revocation Procedures

(Iowa Code Section 331.604, 3(a))

7.8 (1) The purpose of this policy is to clarify the process for **revoking an organization's or a user's access** to the Iowa Land Records Search application or the Iowa Land Records E-Submission service. As provided in Sections 7.3, 7.5 and 7.7, a registered organization and user is required to comply with the Iowa Land Records Terms of Service. Through various means, the Electronic Services System including its officials, employees and contractors will regularly monitor the activities of registered organizations and users to ensure compliance with the ESS Terms of Service. **Registered organizations and users who do not comply with the ESS Terms of Service may have their access privileges revoked.** The basis for revoking an organization's or user's access to ESS services, the likely actions for revoking access, and the process for appealing a decision to revoke access is described in this section.

7.8 (2) Iowa Land Records Terms of Service describes several reasons for **revoking an organization's or a user's access** to the Iowa Land Records Search application or the Iowa Land Records E-Submission service or other services. These reasons include but are not limited to the following.

- a) Creation of multiple [user accounts] logins for the purpose of circumventing the daily search limit

- b) Failure to maintain current and accurate information about the organization
- c) Failure to maintain current and accurate information about each organization user
- d) Failure to maintain current and accurate information for an individual user
- e) Failure to pay required fees for E-Submission services or failure to pay other authorized fees
- f) Provision of an email address for an organization administrator or user that bounces or is rejected by an email service or host
- g) Failure to whitelist emails originating from iowalandrecords.org, clris.com or mailchimp.com (in service to ESS and Iowa Land Records)
- h) Provision of a disconnected or unresponsive telephone number
- i) Usage of an IP address located outside the United States
- j) Usage of an IP address with a documented history of supporting phishing, scams, or illegal activities, or which is identified as a proxy server for devices located outside of the United States
- k) Involvement in the development, use, and deployment of ransomware, as deemed illegal under Chapter 715 Code 2023 of Iowa
- l) Usage of information or services or a pattern of behavior contrary to the published Terms of Service, such as reselling ESS data or services
- m) Usage of information or services to conduct illegal activity, or a pattern of behavior which indicates illegal activity

7.8 (3) As a condition of using the Iowa Land Records Search application or the Iowa Land Records E-Submission service, registered organizations and registered users are required to comply with the Electronic Services System and Iowa Land Records Terms of Service as described in this Chapter (Sections 7.3, 7.5 and 7.7). Violations of the Terms of Service may result in revocation of access through various means and the deactivation of accounts.

7.8 (4) Iowa Land Records reserves the right to enforce compliance and take appropriate action in response to violations. The enforcement actions may include, but are not limited to:

- a) Warning and notification to the organization or user
- b) Blacklisting the accounts of an organization's users or the accounts of individual users
- c) Temporary deactivation of an organization's account or a user's account and restricting access to the Iowa Land Records Search application, the Iowa Land Records E-Submission service, or other services

- d) Permanent deactivation of the organization's account or an individual user's account
- e) Blocking an IP address or range of IP addresses associated with an organization or user
- f) Legal action

7.8 (5) If the Electronic Services System takes action to enforce compliance as described in Section 7.5(4), notice shall be provided to the primary organization administrator or individual user via email. Such notice will be provided within seven business days following an action and the notice will specify the reasons for enforcement. An organization or individual user may appeal a decision to enforce compliance. An appeal shall be submitted via email to support@clris.com. An appeal will be directed to a designated ESS Site Administrator, who shall determine whether access to Iowa Land Records services will be continued or revoked.

Section 7.8 adopted 8.8.23.
Section 7.8 adopted 11.9.23.

ESS – 7.9 Temporary Adjustment To Document Image View Limits

(Iowa Code Section 331.604, 3(a))

7.9 (1) Section 7.3 specifies that the maximum number of document images which may be viewed or downloaded by an organization user shall not exceed 120 documents per day, except when authorized by a Site Administrator. This limitation is programmatically enforced. Permission to view more than 120 documents per day per organization user may be granted to organizations and organization users who are in good standing on a case-by-case basis. Such permission may be denied or revoked by a Site Administrator as provided in Section 7.8(2).

Section 7.3 specifies that the maximum number of document images which may be viewed or downloaded by a registered individual user shall not exceed 10 documents per day, except when authorized by a Site Administrator. This limitation is programmatically enforced. Permission to view more than 10 documents per day per registered individual user may be granted to users who are in good standing on a case-by-case basis. Such permission may be denied or revoked by a Site Administrator as provided in Section 7.8(2).

The purpose of the limitation is to ensure that the Iowa Land Records Search application is structured to serve the needs of real estate professionals as they perform their various functions. Iowa Land Records is not intended to serve as a conduit for facilitating the aggregation of data for private commercial use or for resale. The purpose of this policy is to specify the conditions when an organization user may be granted authorization to temporarily exceed the standard limitation on the number of documents which may be viewed in a day.

7.9 (2) As provided in Section 7.9 (1), organizations, organization users and registered individual users may request permission to temporarily exceed the applicable daily document image view limitation. Requests shall be submitted via email to ESS and Iowa Land Records at support@clris.com . A request shall specify the purpose for the temporary authorization, the desired number of document views per day, the number of users who would be exceeding the standard limit (if applicable), and the desired duration of the temporary authorization.

7.9 (3) The granting of temporary and limited permission to exceed the daily document image view limitation is subject to the following conditions:

- a) The duration of a temporary authorization to exceed the daily document image view limitation shall not be greater than 10 business days.
- b) The maximum number of organization users who may be granted temporary authorization to exceed the daily document image view limitation is five users.
- c) Organizations and individual users must be in good standing.
- d) Preference shall be given to organizations and individual users located in the State of Iowa which can demonstrate a legitimate professional need, such as research, for temporarily viewing a higher number of document images.
- e) Authorization to temporarily exceed the standard limitation on the number of documents which may be viewed in a day shall not be granted to organizations seeking to populate a database for any reason. Organizations seeking bulk data are required to seek it from individual Iowa counties who are authorized by law to transfer data and images in batch format.
- f) Authorization to temporarily exceed the standard limitation on the number of documents which may be viewed in a day shall not be granted to organizations providing a commercial product such as a private or public online searchable database, or to acquire documents for resale through any method or in any form. Such uses of ESS and Iowa Land Records are prohibited.
- g) Organizations and users authorized to temporarily exceed the standard limitation on the number of document images viewed shall otherwise comply with the Terms of Service and all applicable laws, regulations, and policies.
- h) ESS and Iowa Land Records reserve the right to monitor and audit the activities of organizations and their users who have been granted permission to temporarily exceed the daily document image viewing limitation.
- i) ESS and Iowa Land Records reserve the right to terminate an authorization to temporarily exceed the daily document image viewing limitation as provided in Section 7.8(2).

7.9 (4) Iowa Land Records shall maintain a record of organizations and organization users who have been granted authorization to temporarily exceed the daily document image view limitation, including the justification for granting such authorization. Iowa Land Records shall establish a mechanism for users to report any misuse of this policy.

Section 7.9 adopted 8.8.23.

Section 7.9 revised 11.9.23.

ESS – 7.10 ESS Central Authentication Service

(Iowa Code Section 331.604, 3(a))

7.10 (1) Authorized users of the Iowa Land Records Search Application or the Iowa Land Records E-Submission Service will be assigned a unique user identification for the purposes of logging in to the ESS Central Authentication Service. Access to applications and functions are based on permissions granted by either ESS Administrators or in certain cases organization administrators. Authorized users will be required to comply with specified requirements for user identifications (user IDs) and passwords.

The Electronic Services System reserves the right to deactivate the account of an organization or a user who is determined to be inactive. Inactivity is based on the period of time between actions to log in to the ESS Central Authentication Service. The period of time will be specified by ESS and will be based on commonly accepted security standards. Organizations and users who are deactivated may request reactivation provided the user or users are considered to be a User In Good Standing.

Section 7.10 adopted 8.8.23

POSSIBLE ADDITION TO SECTION 7.10 OF THE ESS TERMS OF SERVICE POLICY

This reflects the current configuration and practice with the ESS Central Authentication Service (CAS).

No action is requested at this time, but may be addressed at the next meetings of the ESS Standards Subcommittee.

Amend Section 7.10, ESS Central Authentication Service by inserting the following new subsection.

7.10 (2) An authorized user of the ESS Central Authentication Service and any associated applications is required to select an available username (ID) for the purposes of identification and login functions. ESS usernames are solely owned by ESS, and any username, when selected by an authorized user, is granted with the permission of ESS. An authorized user has no right to a particular username. All users are required to remain active and log in at least once within 120 calendar days since the previous login. A user will automatically be deactivated if this periodic login requirement is not fulfilled.

If a user access privilege is revoked as provided in section 7.8 of the ESS Policies and Procedures, or if a user is deactivated due to inactivity or for any other reason, then the privilege to be identified with a particular username is terminated. If user access to the ESS Central Authentication system and the associated applications is reinstated, then a user may request the use of the previously assigned username, if it has not been assigned to another user.

POSSIBLE ADDITION TO SECTION 331.601A - DEFINITIONS

The draft legislation presented to the general assembly includes an addition to Section 331.601A which provides a definition for the Electronic Services System (ESS). See Section 4 of the proposed bill draft. As noted in the bill's explanation, the purpose of adding the definition is to "to clarify the use of the term electronic services system" as the governing entity for the county land record information system.

Recently the full draft of the legislation was reviewed with ESS legal counsel (Brick Gentry P.C.). Based on that discussion it is suggested that a companion definition for a county land record management system also be added. In the context of describing the duties and responsibilities of ESS, providing a definition for the county recording systems provides clarity to the other very important part of what is generally known as the county land record information system.

No action is requested at this time, but a suggested definition has been drafted for consideration as other amendments to the draft legislation are reviewed through the legislative process.

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

11. County Land Record Management System. A County Land Record Management System is the physical or hosted system maintained or licensed by each county for recording documents, assigning recording reference numbers, specifying recording times, maintaining the database and index of records, and archiving physical and electronic documents and generally providing recording services as required in chapter 331, subchapter V, Part 3 and section 558.49.