

**Standards Subcommittee
Teleconference Meeting Summary
April 23, 2024**

Participants

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

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

Other Participants

Ann Ditsworth, Dickinson County Recorder
Nancy Booten, Lee County Recorder
ReNae Arnold, Dallas County Recorder
Erin Canfield, Boone County Recorder
Miranda Bills, Audubon County Recorder
Deb McDonald, Green County Recorder

Lisa Kent, Wapello County Recorder
Sue Meyer, Clayton County Recorder
Travis Case, Grundy County Recorder
Karol Kennedy, Dubuque County Recorder
Stacie Herridge, Story County Recorder
Cathy Voith, Calhoun County Recorder

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

Lisa Long, 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 other members of the Document Formatting working group.

October Meeting Summary

The Subcommittee reviewed the January 23, 2024, meeting summary. Carolyn Siebrecht made a motion to approve the meeting summary. Ashten Wittrock seconded, and the motion was approved.

Iowa Recording Fee and Business Process Modernization Project

Project Charter

The Standards Subcommittee received a summary of the ongoing discussion on potential changes to recording fees as part of the recording and business process modernization project, initiated by the Iowa Country Recorders Association. It was noted that joint recorder/stakeholder meetings had been held with Surveyors, Auditors and Iowa Land Title Association.

Modernization Preliminary Survey Results

The Standards Subcommittee and the document formatting working group discussed the preliminary results of the modernization survey. The report highlighted results with high ratings for proposals considered "Very Important." As of the meeting date, the most responses were received from the following stakeholder groups: law firms, abstractors, and surveyors. The final survey results will be shared the committees, working groups and stakeholders.

Consideration of Statutory Policy Recommendations

The Subcommittee was presented with a memo from the Project Manager which summarized the review of document formatting and document content requirements, and several other related policies. The memo also included the recommendations of the Project Manager. The following is a review of the primary points of discussion.

Font Size Requirements

A question was raised about a possible contradiction between the new policy specifying a minimum 10-point font size and other parts of the policy mentioning an 8-point font size. It was

clarified that the current policy has been amended to specify a 10-point font across the board, except for surveyor documents which can use an 8-point font size (which is consistent with current policy). The primary change in policy is the removal of references to 8-point type for pre-printed text.

Parcel Identification Numbers

The Subcommittee discussed the recommendation to require the indexing of parcel identification numbers (PINs) going forward. The following points about the recommendation were clarified.

- The requirement would be day-forward and not applicable to previously recorded conveyance documents.
- Preparers and submitters would be required to include the current parcel identification numbers in the documents, as applicable.
- Recorders would be required to index the parcel identification numbers present in documents submitted for recording.
- Recorders would NOT be required to update parcel identification numbers in antecedent, previously recorded documents.
- When new parcel identification numbers are assigned by the county (such as in the case of a subdivision or a consolidation), the county would be expected to provide the updated information to the recorder (in some manner).
- Recorders would be required to ADD the new information to the index of the recently recorded conveyance document. No changes to the previously indexed PIN information would be expected.
- The additional of the new information would be required “as soon as practicable.”

Generally, the Subcommittee and working group endorsed taking steps to require the indexing of parcel identification numbers going forward. It was noted that further work would be required to clarify the definition and type of the parcel identification number so that it is consistently used by all counties and offices. The Subcommittee also identified the need to verify that local service providers could comply with the requirements for the parcel identification numbers and additional parcel identifiers.

Platted Land Indexing

Participants discussed the possibility of indexing data elements typically associated with unplatted land with documents for platted land. This would be day-forward only. The idea originated from discussions with surveyors who have expressed a desire to search for records using a combination of platted and unplatted data elements. It was noted that ILR data schema already has “section” as a data element in platted land. The question was whether this could be leveraged without requiring much development work.

The Subcommittee and working group believed that this idea would be more successful if it included township and range, not just the section data. The consensus was to retain the concept in the plan for further discussion but review it further with the surveyors before finalizing anything.

Electronic Recording Issue

Participants reviewed proposed changes to 331.606B, subsection 6. Concern was expressed about language which would require recorders to notify submitters of the reasons for making a fee change with respect to electronic documents. It was noted that the E-Submission system provided these notifications to the submitters, and that the communication was initiated by the Iowa Land Records system and not the county recorder’s office. It was agreed that an edit would be made to the language which would clarify this.

Preparer Information

The Subcommittee and working group expressed a desire to require that preparers provide either their phone number or an email address in documents submitted for recording. This would be included in Subsection 2 of 331.606B, paragraph a. The lettered paragraph would read as follows:

- a. The name, address and either the telephone number or email address of the individual who prepared the document.

Plat of Survey Dimension

The Subcommittee and working group reviewed the proposed amendment to 331.606A (7) which added to the definition of "Page" a plat or survey with dimensions of eleven inches by seventeen inches or up to twenty-four inches by thirty-six inches. The discussion confirmed that the larger dimensions were limited to surveys and plats.

Index Legend and Other Index Information

During previous meetings the draft legislation included provisions relating to Index Legends and their potential use beyond surveys, plats, and related documents. It was noted that the Index Legend provisions had been removed from the latest version of the draft legislation, because the idea didn't seem to have gained much traction with the stakeholder groups. It could be revisited if stakeholders show more interest going forward.

For similar reasons, ideas for indexing additional information such as notaries and notary commission numbers, or references to information in external systems such as MERS have not been included in the draft legislation. This could also be given further consideration in the future if there is sufficient interest.

Authorization To Decline

The Subcommittee and working group were asked to review the proposed new introductory paragraph to Section 331.606B (1) concerning the authority to decline recording a document if it does not conform to the statutory requirements for document formatting and content, or if the form of a document or instrument prevents or inhibits the county recorder from performing their duty. The participants considered whether the term "may" or "shall" should be used in this introduction. After discussion, it was agreed that the term "may" would be used in this paragraph, given that all of the referenced requirements specified in 331.606B.

OTHER UPDATES

ILTA Discussion

The Subcommittee and working group received an update concerning recent conversations with representatives of the Iowa Land Title Association. A summary of a meeting held on April 4, 2024, and a Q&A document was shared.

ILR Data Normalization

The Subcommittee and working group received an update on the topic of Data Normalization, referencing a memo that had been distributed on February 15, 2024. It explained that "normalization" would primarily affect the ILR database without impacting recorder systems. The goal is to standardize all data within the ILR system to make it more complete and consistent. Counties would potentially have the option to integrate this updated data into their local indexing systems.

Chapter 3 – Parcel Identification Numbers

For reference, an earlier draft of a proposed amendment to chapter 3 of the ESS policies and procedures was shared. This is a draft policy concerning parcel identification numbers that was considered in prior meetings. However, it is not being advanced currently. Further action would be dependent on the outcome of the legislation discussed earlier in the meeting.

Achievable Modernization Project Initiatives

The Subcommittee and working group received an update on the possible modernization ideas that seem to be gaining the most interest from stakeholders and policy makers. The following ideas are included.

- A recording alert and notification system.
- Reconnecting ILR with the Beacon property information system.
- Revisions to the "Back the Blue" policy to shield court officer personnel.
- Data Normalization.
- Providing online access to Historical Surveys and Plats.
- Updating the External Submitter API.
- Create a Multi-Jurisdiction Plat Approval Process.
- Internalizing PII Redaction Processes.
- Enhancing the Two-Factor Authentication login process.

It was noted that the "Abstract of Modernization Ideas" has help stimulate conversation among stakeholders and policy makers, even though some of the ideas may not be implemented.

Software Development Update

- The ILR has successfully migrated to a cloud system.
- Enhancements to the recorder E-Submission search functions are in development.
- Ongoing software development and implementation efforts are focused on the E-Submission API and the county upload API.

Next Regular Meetings

Tuesday, July 23 - 10 AM to Noon

Thursday, October 17 - 1 to 3 PM