

# The Property Records Electronic Portal (PREP) System

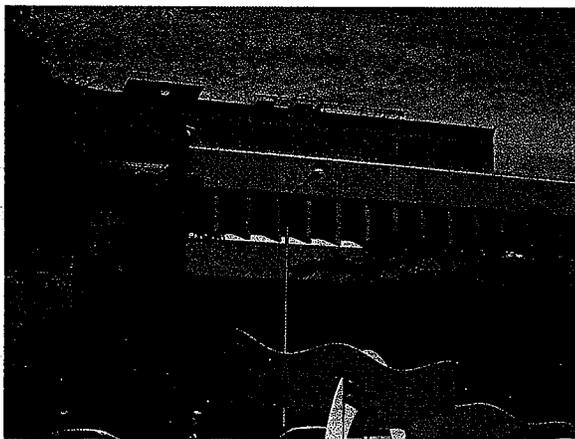
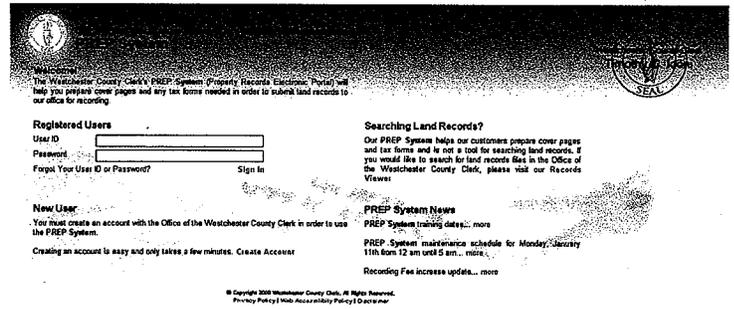
*Filing Land Records in the Office of the Westchester County Clerk*

<http://prep.westchesterclerk.com>

## PREP – The Basics

### What is the PREP System?

The Property Records Electronic Portal (PREP) System is a web-based application from which customers are required to create cover pages and tax forms for documents submitted to the Office of the Westchester County Clerk after January 1, 2010.



### Are documents now going to be eRecorded?

No. The process of eRecording is not authorized in New York State. When it is authorized, we look forward to providing the ability to eRecord in the Office of the Westchester County Clerk. However, at present, your original documents must be mailed or delivered to our office.

### Why has Westchester created the PREP System?

The PREP System was created in order to increase operational efficiency, reduce the number of rejected documents and shorten recording time for land records. It also allows our customers to track their submissions in real time. There are no additional fees associated with the use of the PREP System.

### Will I have to use the PREP System?

Yes. If you wish to present a land document for recording by our office after January 1<sup>st</sup>, it must be accompanied by cover pages and tax forms created on the internet through the PREP System.



## **What tax forms need to be created using the PREP System?**

The New York State Real Property Transfer Report (RP-5217) and the New York State Real Estate Transfer Tax Return (TP-584) must be created using the PREP System.

The Non-Resident Real Property Estimated Income Tax Payment Form (IT-2663) does not have to be created using the PREP System. However, you need to indicate in the PREP System that an IT-2663 will be submitted and print a PREP Support Paper cover page.

**As a future enhancement**, customers will have the option of creating either of the following returns using the PREP System: Mount Vernon Real Property Transfer Tax Return and Yonkers Real Property Transfer Tax Return.

## **For which documents can cover pages be created on PREP?**

Cover sheets for the following land records submissions can be created:

Affidavit	Deed	Mortgage, Correction
Agreement	Deed, Cemetery	Negative Pledge
Assignment of Lease & Rents	Deed, Correction	Notice of Appropriation
Affidavit of Service	Deed, Sherriff's	Order
Assignment	Deed, Torrens	Power of Attorney
Cancellation of Agreement	Easement	Power of Attorney, Revocation
Commitment	Homestead Exemption	Registered Agreement
Contract	Judgment	Release of Mortgaged Premises
Certificate	Lease Agreement	Release of Estate Tax
Declaration	Letters Patent	Satisfaction of Mortgage
Dedication	Mortgage Agreement	Waiver
Deed Agreement	Mortgage	Will

## **Do you need to use PREP to create cover pages for lien submissions such as Uniform Commercial Code statements?**

No. Unlike the ACRIS System used in New York City, Westchester County will not require the creation of cover pages for lien submissions such as Uniform Commercial Code statements on January 1<sup>st</sup>. However, we hope that you will use our UCC e-filing system to e-file your UCCs. For more information, visit [www.WestchesterClerk.com](http://www.WestchesterClerk.com).

# Creating Your PREP Account

Creating a PREP account will only take you a few minutes. To start:

Go to [www.prep.westchesterclerk.com](http://www.prep.westchesterclerk.com).

You will arrive at our Login Screen. Choose "Create Account" by clicking on the blue text indicated below.

**Welcome!**  
The Westchester County Clerk's PREP System (Property Records Electronic Portal) will help you prepare cover pages and any tax forms needed in order to submit land records to our office for recording.

**Registered Users**  
User ID   
Password   
Forgot Your User ID or Password? [Sign In](#)

**New User**  
You must create an account with the Office of the Westchester County Clerk in order to use the PREP System.  
Creating an account is easy and only takes a few minutes. [Create Account](#)

**Searching Land Records?**  
Our PREP System helps our customers prepare cover pages and tax forms and is not a tool for searching land records. If you would like to search for land records files in the Office of the Westchester County Clerk, please visit our Records Viewer

**PREP System News**  
[PREP System training dates... more](#)  
[PREP System maintenance schedule for Monday, January 11th from 12 am until 5 am... more](#)  
[Recording Fee increase update... more](#)

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You will arrive at the Create Account Screen where you will be asked for some basic information:

**Office of the Westchester County Clerk Making Government Easy**  
**PREP System**

To register to use the Westchester County Clerk's PREP System (Property Records Electronic Portal), please take care in entering your account information.

**Your User ID:** Choose a User ID which you will be asked to enter each time you login to PREP.

**Your Password:** Choose a password that is at least 8 characters in length and has at least one letter and at least one number.

**Security Question:** You must answer at least one security question so we can identify you if you forget your password.

**Contact e-mail:** The e-mail address you enter will be the e-mail address to which alerts will be sent.

User ID   
Password  (Your Password must be 8-12 alphanumeric characters and contain at least one letter.)  
Confirm Password   
Security Question  Please Choose One  
Security Answer   
Address 1   
Address 2   
City  State  New York  
Contact Name  First Name  MI  Last Name   
Contact Phone  Contact Fax   
Contact Email   
Confirm Email

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Please be careful when you create your account as this information will appear as your Submitter Information on the Recording & Endorsement cover pages you will eventually create.

The Office of the Westchester County Clerk: This page is part of the instrument; the County Clerk will rely on the information provided on this page for purposes of indexing this instrument. To the best of submitter's knowledge, the information contained on this Recording and Endorsement Cover Page is consistent with the information contained in the attached document.		 *492560851PAT0014*	
<b>Recording &amp; Endorsement Page</b>			
09/10/2009 10:06:00 AM			
<b>Submitter Information</b>			
Name:	Smith Jane	Phone:	(914)555-5555
Address 1:	123 Main Street	Fax:	(914)555-5551
Address 2:		Email:	jane@email.com
City/State:	White Plains NY 10601	Reference for Submitter:	Smith Power of Attorney
<b>Document Details</b>			
Control Number:	492560851	Document Type:	Power of Attorney (PAT)
Package ID:	2009091307798001000	Document Page Count:	s
		Total Page Count:	6
1st PARTY		2nd PARTY	

Once you have finished entering all of your account information, choose "Add User" and you should receive a message confirming that your account has been created:



Congratulations. Your PREP System account has been created. To get started by signing in, click [here](#).

By clicking on the link provided, you will be redirected to the Login page and should enter your User ID and Password and then choose "Sign In".

**Registered Users**

User ID:

Password:

[Forgot Your User ID or Password?](#)

### Searching Land Records?

Our PREP System helps our customers prepare cover pages and tax forms and is not a tool for searching land records. If you would like to search for land records files in the Office of the Westchester County Clerk, please visit our [Records Viewer](#)

You are now ready to start entering a package.

## Entering A PREP Package

Documents enter the Office of the Westchester County Clerk in “packages” or groups of related documents. Your package may consist of only one document, such as a Satisfaction of Mortgage. Or, your package may consist of many documents such as a Deed, Mortgage, Power of Attorney and tax forms all related to the same land transaction.

As soon as you login, you will arrive at your packages screen. As a new user, you will not have any packages listed on the packages screen. You will need to create a new package. To do so, choose “Create A Package” and a pop-up will appear.

The screenshot shows the 'Office of the Westchester County Clerk Making Government Easier' PREP System. The user is Jane Smith. The interface includes a navigation menu with 'My Packages | My Account', 'Logout | Help', 'Application | Rejection | Finance | Payment Processing', and 'Add Document'. A 'Create A Package' button is highlighted. A callout box points to this button with the text: 'First: Choose "Create A Package" by clicking on it.' Below the button, a text input field for 'Choose a package name' is shown. A callout box points to this field with the text: 'Second: Name your package. The name should help YOU identify your package and will not be used by our office.' Below the name field, a dropdown menu for 'Choose your document' is shown with 'Select a document type' selected. A callout box points to this dropdown with the text: 'Third: Select your document type. If you want to begin by creating your tax forms, choose the document, such as a Deed, that your tax forms are supporting.' A 'Tip' box states: 'Tip: If you want to begin by creating your tax forms, choose the document such as a Deed, that your tax forms are supporting.' A table on the left shows 'Current Package Description' and 'Package Description' for 'Smith Power of Attorney'. At the bottom, there is a copyright notice for 2009 Westchester County Clerk and a version number of 1.0.0.0.

Office of the Westchester County Clerk Making Government Easier  
PREP System

Welcome, JaneSmith

Documents enter the Westchester County Clerk's office in 'packages' or groups of related documents. Your package may consist of only one document, such as a Satisfaction of Mortgage. Or, your package may consist of many documents such as a Deed, Mortgage, Power of Attorney and tax forms all related to the same land transaction. Once you have chosen a name that will help you identify your package (such as 'Smith Closing'), you are ready to create a package. Use the blue arrows to change the order that documents within your package will be displayed. If you wish to learn the status of your package because they have been submitted, you can click on the package row and additional details about the package will be displayed.

**First:** Choose "Create A Package" by clicking on it.

**Second:** Name your package. The name should help YOU identify your package and will not be used by our office.

**Third:** Select your document type. If you want to begin by creating your tax forms, choose the document, such as a Deed, that your tax forms are supporting.

Tip: If you want to begin by creating your tax forms, choose the document such as a Deed, that your tax forms are supporting.

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Version: 1.0.0.0

Once you have chosen your package name, and selected your document type, you will enter the core PREP application.

## PREP Structure

The PREP System is structured so that you will progress through a series of screens. Each screen will collect related pieces of information. You can navigate through the PREP System one of two ways.

It is preferred that you navigate through the system using the commands in the lower right hand corner which allow you to move to either the previous or next screen. When using these buttons, the system will check to be sure that all necessary information has been entered and you are ready to proceed to the next screen. If you have not entered all required information, you will receive an error message.

< prev | next >

You can also navigate through the system by clicking on the various tabs for Party, Property, Taxes, Cross References, Fees, and Record & Return. However, if you use the tabs to navigate, **you will not receive error messages indicating that required information is missing.**



Once you have progressed through all necessary screens you will return to the packages screen where you can add another document to your package, or checkout by indicating how you will be paying for your package.

## Entering Parties in the PREP System

Once you have named your package and chosen a document type, you will land on the Party tab of the PREP System.

In PREP you must enter each party to a transaction separately. When entering parties, you will need to make the following choices:

The screenshot shows the 'Party' tab of the PREP System. At the top, it says 'Office of the Westchester County Clerk Making Government Easy PREP System'. Navigation links include 'My Packages | My Account' and 'Logout | H'. Below this, it displays 'Payment Packet: 2009091307799001000 (Test Closing)' and 'Land Document: 492560852 (Deed (DED))'. The navigation tabs are Party, Property, Taxes, Cross Reference, Fee Calculation, and Record & Return. The main form area has a header: 'Enter each party to your transaction one at a time by filling in the required fields and choosing "Add Party" to display your party details in the grid below. Choose "Copy Previous Party" to select a party previously entered as part of this package.' There is a 'Copy Previous Party' link on the right. The form fields include: Party (dropdown menu with 'Grantor/Transferor/Seller' selected), Party Type (dropdown menu with 'Individual' selected), Fiduciary Status (dropdown menu), Last Name (text input), First Name Middle Initial (text input), and Suffix (dropdown menu with 'None' selected). Below these fields, there are checkboxes for tax forms: 'RP-5217' and 'TP-584', both of which are checked. A callout box on the left asks 'What party are you entering?' and explains that party types are customized to documents, such as 'Grantor/Transferor/Seller' for deeds and 'Appointor/Appointee' for Powers of Attorney. A second callout box asks 'What party type are you entering?' and explains that users must indicate if the party is an individual, corporation, estate/trust, or other type. A third callout box asks 'Is your party acting as a fiduciary or does your party have a fiduciary acting on his or her behalf?' and explains that users can choose a fiduciary status like 'Referee' or 'Trustee' from a dropdown list. At the bottom, there is an 'Address' field with the value '123 Main Street, White Plains, NY 106'. Navigation links '< prev | next >' are at the bottom right.

Once you have made these choices, you should enter the name of your party.



**Be careful** when entering your party name as your entry will appear on the cover page, on the TP-584 if required, on the RP-5217 if required, and in the Westchester County Clerk's index. And remember, the party name must be exactly as it appears on the document you are submitting for recording.

Continue to enter party information as follows:

**Office of the Westchester County Clerk Making Government Easy**  
**PREP System**

My Packages | My Account      Logout | Help

Payment Packet: 2009091307799001000 (Test Closing)      Land Document: 492560852 (Deed)

Party      Property      Taxes      Cross Reference      Fee Calculation

Enter each party to your transaction one at a time by filling in the required fields and choosing "Add Party" below. Choose "Copy Previous Party" to select a party previously entered as part of this package.

Party: Grantor/Transferor/Seller      Party Type: Individual      Suffix: None

Last Name: \_\_\_\_\_      First Name Middle Initial: \_\_\_\_\_

The party type I am entering should appear on the following tax forms:  RP-5217       TP-584

Address 1: \_\_\_\_\_      Address 2: \_\_\_\_\_      City: \_\_\_\_\_      State: New York      Country: United States of America

SS# - - (OR) Federal EIN -       Pending Privacy Statement

**including a party on tax forms: If your document requires a TP-584 and/or a RP-5217, these boxes will be checked off. To remove a party from one of these forms, please uncheck the relevant box.**

**Saving Party Information: Once you have completed all fields, choose "Add Party" and your party details will appear in the party grid below.**

Party	Party Type	Name	Address	SS#/EIN	Actions
First Party	Individual	SMITH, JOHN	123 Main Street, White Plains, NY 10601	XXX-XX-1111	Edit   Delete

< prev | next >

If the document you are entering will never require a TP-584 or a RP-5217, address and tax identification numbers will not be collected in the PREP System. You will know this information will not be required because the fields will be grayed out as follows:

**Office of the Westchester County Clerk Making Government Easy**  
**PREP System**

My Packages | My Account      Logout | Help

Payment Packet: 2009091307798001000 (Smith Power of Attorney)      Land Document: 492560851 (Power of Attorney (PAT))

Party      Property      Taxes      Cross Reference      Fee Calculation      Record & Return

Enter each party to your transaction one at a time by filling in the required fields and choosing "Add Party" to display your party details in the grid below. Choose "Copy Previous Party" to select a party previously entered as part of this package.

Party: Appointor      Party Type: Individual      Fiduciary Status: None

Last Name: \_\_\_\_\_      First Name Middle Initial: \_\_\_\_\_      Suffix: None

The party type I am entering should appear on the following tax forms:  RP-5217       TP-584

Address 1: \_\_\_\_\_      Address 2: \_\_\_\_\_      City: \_\_\_\_\_      State: \_\_\_\_\_      Zip: \_\_\_\_\_

Country: \_\_\_\_\_

SS# - - (OR) Federal EIN -       Pending Privacy Statement

Party	Party Type	Name	Address	SS#/EIN	Actions
First Party	Individual	SMITH, JANE	_____	_____	Edit   Delete
Second Party	Individual	SMITH, JOHN	_____	_____	Edit   Delete

Use "Copy Previous Party" to save time entering parties with similar details.

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PREP System**

Payment Packet: 2009091307799001000 (Test Closing) Land Document: 492560852 (Deed)

Party | Property | Taxes | Cross Reference | Fee Calculation

Enter each party to your transaction one at a time by filling in the required fields and choosing "Add Party" to display your party details in the grid below. Choose "Copy Previous Party" to select a party previously entered as part of this package.

Party: Grantor/Transferor/Seller Party Type: Individual Fiduciary Status: [ ]

Last Name: [ ]

The party type I am entering: [ ]

Address 1: [ ]

City: [ ]

Country: United States

SS#: [ ] - [ ]

PREP - Copy Previous Party

To copy previous party information, click on "Copy" in the Action column

Name	Address	Action
SMITH, JOHN	123 Main Street , White Plains, NY 10601	Copy
SMITH, JANE	123 Main Street , White Plains, NY 10601	Copy

Add Party

Actions
1 Edit   Delete
2 Edit   Delete

< prev | next >

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Version: 1.0.0.0

Note that the party details will appear in the relevant fields so that you can edit them before choosing "Add Party".

Once you have entered all of the relevant parties listed on your document, please choose next. If you have not entered a required party (for instance you entered a Grantor for a deed, but not a Grantee) or you have not entered a required piece of information, such as tax identification number, you will receive an error message alerting you that a required piece of information is missing. For example:

PREP

The following fields are required for this document

- City
- Zip
- SSN

Once you have entered all required information, click on "Add Party" to add the party to your grid and then click on "next" to move to the Property Screen.

# Entering Property in the PREP System

You must enter each separate tax parcel impacted by your submission as follows:

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**PREP System**

Payment Packet: 2009091307799001000 (Test Closing) Land Document: 492560852 (Deed (DED))

Party Property Taxes Cross Reference Fee Calculation Record & Return

Enter each property affected by your transaction one at a time by filling in the required fields and then choosing "Add Property". Choose "Copy Previous Property" to select a property previously entered as part of this package.

Section-Block-Lot  -  -  (OR) Tax Map Identification #

Street Number  Street Name

City/Town  Village  Zip

Copy Previous Address

Add Property

Tax Map Identifier	Street Address	City/Town	Village	Zip	Action
1 - 234 - 5	123 Main Street	White Plains		1060	

**First:** Enter either a Section Block and Lot OR a Tax Designation which is not in Section Block and Lot form.

**Second:** Enter the street number and the street name. If there is no street number, enter "None".

**Third:** Choose the City or Town from a dropdown, the village if necessary, and the zip code when required.

**Fourth:** Choose "Add Property" once all required fields have been completed.

Just as you could copy a party, you can also copy a property by choosing "Copy Previous Address" in the upper right hand corner:

**Office of the Westchester County Clerk Making Government Easy**  
**PREP System**

Payment Packet: 2009091307799001000 (Test Closing) Land Document: 492560852 (Deed (DED))

Party Property Taxes Cross Reference Fee Calculation Record & Return

Enter each property affected by your transaction one at a time by filling in the required fields and then choosing "Add Property". Choose "Copy Previous Property" to select a property previously entered as part of this package.

Section-Block-Lot  -  -  (OR) Tax Map Identification #

Copy Previous Address



Be careful when entering property details. The property details you enter will appear on the cover page, on the TP-584 if required, on the RP-5217 if required, and the town will appear in the Westchester County Clerk's index. And remember, the property details must be entered as they appear on the document you are submitting for recording.

Once you have entered all of your properties, choose "next" to navigate to the Taxes tab.

# Entering Tax Form Details

On the "Taxes" screen, PREP will ask you for some details necessary in order to calculate any transfer taxes due in connection with the conveyance you will submit for recording.

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PREP System

My Packages | My Account      Logout | Help

**First:** Enter the date of the document, such as a Deed, that you will be presenting for recording.

**Second:** Enter the conveyance amount, any lien deduction and then the % of residential real property as it will appear on your tax forms.

**Third:** If you are going to be claiming an exemption on Schedule B, C, E, F or G of your TP-584, you need to select the exemption from the drop down provided by clicking on it.

Document Date: 9/22/2009      Conveyance Amount: \$1,250,000.00      Lien Deduction:

% of Residential Real Property: 100.00 %      Exemptions/Tax Credits: Select an Exemption

Please select check box if any of the transferor/seller(s) are non-residents of New York State and do not qualify for an exemption under the Tax Law section 663(c)

**Fourth:** Be sure to check the box if a Form IT-2663 is required.

**Fifth:** Choose "Calculate Taxes".

Calculate Taxes

Once you have chosen "Calculate Taxes" the transfer taxes due will appear in the lower left hand corner of the screen:

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PREP System

My Packages | My Account      Logout | Help

Payment Packet: 2009091307799001002 (Test Closing)      Land Document: 492560852 (Deed (DED))

Party      Property      Taxes      Cross Reference      Fee Calculation      Record & Return

Your document must be supported by the tax forms listed below. To create these tax forms, please fill in the requested information, including exemptions, and choose "Calculate Taxes". Once your taxes have been calculated, choose "Create" in the Actions column to the right of the tax form. Be sure to save your tax form before closing it by scrolling down to the very bottom of the form and choose the "Save" button.

Document Date: 9/22/2009      Conveyance Amount: \$1,250,000.00      Lien Deduction: \$0.00

% of Residential Real Property: 100.00 %      Exemptions/Tax Credits: Select an Exemption

Please select check box if any of the transferor/seller(s) are non-residents of New York State and do not qualify for an exemption under the Tax Law section 663(c)

Calculate Taxes

Tax Form(s)	Status	Actions
RP-5217 Real Estate Transfer Tax Report	Saved	Edit   Delete   Print
TP-584 Combined Real Estate Transfer Tax Return	Saved	Edit   Delete   Print

Type	Taxable Consideration	Tax Due	Credit Claimed	Total Tax Due
Transfer Tax	\$ 1,250,000.00	\$ 5,000.00	\$ .00	\$ 5,000.00
Mansion Tax	\$ 1,250,000.00	\$ 12,500.00	\$ .00	\$ 12,500.00
<b>Total</b>		<b>\$ 17,500.00</b>	<b>\$ .00</b>	<b>\$ 17,500.00</b>

< prev | next >

# Completing Your Tax Forms

You are now ready to finalize your RP-5217 and your TP-584.



Be careful. You should not begin creating your tax forms unless you have all of the information necessary to complete them. The PREP System will not allow you to save your tax forms unless all required fields have been completed.

When you are ready to complete your tax forms, begin by clicking on "Create" in the Actions column next to the return you would like to complete first. The return will appear as a pop-up. You may wish to choose "Highlight Fields" in your pop-up so that fields to be completed will be highlighted:

INSTRUCTIONS: <http://www.orps.state.ny.us> or PHONE (518) 473-9791

**REAL PROPERTY TRANSFER REPORT**

STATE OF NEW YORK  
STATE BOARD OF REAL PROPERTY SERVICES

**RP - 5217**  
RP-5217 Rev 1/29/09

**PROPERTY INFORMATION**

1. Property Location: 123 Main Street, White Plains, 10601

2. Buyer Name: SMITH, JANE

Complete all required fields by clicking in the field and then entering information. Once you have completed the return, be sure to choose the "Save" button at the bottom of the return.

**CERTIFICATION**

I Certify that all of the items of information entered on this form are true and correct (to the best of my knowledge and belief) and I understand that the making of any willful false statement of material fact herein subject me to the provisions of the penal law relative to the making and filing of false instruments.

**BUYER**

BUYER SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_  
STREET NUMBER \_\_\_\_\_ STREET NAME \_\_\_\_\_  
CITY OR TOWN \_\_\_\_\_ STATE \_\_\_\_\_ ZIP CODE \_\_\_\_\_

**BUYER'S ATTORNEY**

LAST NAME \_\_\_\_\_ FIRST NAME \_\_\_\_\_  
AREA CODE \_\_\_\_\_ TELEPHONE NUMBER (Ex: 0000000) \_\_\_\_\_

**SELLER**

SELLER SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

Once a return has been saved, the user will have the option to Edit, Delete or Print the return:

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**PREP System**

My Packages | My Account Logout | Help

Payment Packet: 2009091307799001002 (Test Closing) Land Document: 492560852 (Deed (DED))

Party Property Taxes Cross Reference Fee Calculation Record & Return

Your document must be supported by the tax forms listed below. To create these tax forms, please fill in the requested information, including exemptions, and choose "Calculate Taxes". Once your taxes have been calculated, choose "Create" in the Actions column to the right of the tax form. Be sure to save your tax form before closing it by scrolling down to the very bottom of the form and choose the "Save" button.

Document Date: 9/22/2009 Conveyance Amount: \$1,250,000.00 Lien Deduction: \$0.00  
 % of Residential Real Property: 100.00 % Exemptions/Tax Credits: Select an Exemption

Please select check box if any of the transferor/seller(s) are non-residents of New York State and do not qualify for an exemption under the Tax Law section 663(c)

Tax Form(s)	Status	Actions
RP-5217 Real Estate Transfer Tax Report	Saved	Edit   Delete   Print
TP-584 Combined Real Estate Transfer Tax Return	Saved	Edit   Delete   Print

If you choose to print the return, please note that it will print with a PREP Support Paper cover page which must accompany the return when it is submitted to our office.

The Office of the Westchester County Clerk: This page is part of the instrument; the County Clerk will rely on the information provided on this page for purposes of indexing this instrument. To the best of submitter's knowledge, the information contained on this Recording and Endorsement Cover Page is consistent with the information contained in the attached document.

  
\*492560853RPD0016\*

**Supporting Document Cover Page**

**Submitter Information**

Name: Smith Jane Phone: (914)555-5555  
 Address 1: 123 Main Street Fax: (914)555-5551  
 Address 2: Email: jane@email.com  
 City/State/Zip: White Plains NY 10601 Reference for Submitter: Test Closing

**Parent Document Details**

Control Number: 492560852 Document Type: Deed (DED)  
 Package ID: 2009091307799001002

**Supporting Document Information**

Supporting Document Type: RP-5217

If you are only creating your tax forms for your closing at this point, choose "Logout" in the upper right hand corner to complete your PREP session.

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**PREP System**

My Packages | My Account Logout | Help

Payment Packet: 2009091307799001000 (Test Closing) Land Document: 492560852 (Deed (DED))

Party Property Taxes Cross Reference Fee Calculation Record & Return

# Return to PREP to Create a Cover Page for a Deed

After your documents have been executed, you can return to PREP to create the cover page for your Deed. To begin, login to PREP. Then review your package grid to find the package you wish to work on. Double click on the package to reveal the details.

Current Package Description	Package Id	Status	Actions	
Test Closing	200909		Add Doc   Pay   Submit   View Letter	
▲ ▼ Deed (DED) #492560852			Edit   Delete   Print Draft	
RP-5217 #492560853			Print	
TP-584 #492560854			Print	
Package Description	Package Id	Status	Created By	Created
Smith Power of Attorney	2009091307798001000	Pending	JaneSmith	09/13/2009
Test Closing	2009091307799001000	Pending	JaneSmith	09/13/2009

**First:** Double click on the package you want to work on.

**Second:** Once your package details appear, choose "Edit".

Once you have chosen, "Edit" you will be returned to the Party Screen. If you have no cross references, you can choose the Fee Calculation Tab by clicking on it:



**Office of the Westchester County Clerk Making Government Easy  
PREP System**

My Packages | My Account Logout | Help

Payment Packet: 2009091307799001000 (Test Closing)    Land Document: 492560852 (Deed (DED))

Party   Property   Taxes   Cross Reference   Fee Calculation   Record & Return

*Please enter the number of pages for your document and then choose "Calculate Fees" to view the breakdown of fees payable to record your document. If your document is exempt from all fees, please place a checkmark in the proper box before choosing "Calculate Fees".*

Document Page Count      This document is exempt from all fees

Fee Type Description	Amount
Statutory Recording Fee	\$40.00
Page Fee	\$30.00
Cross-Reference Fee	\$0.00
Mortgage Affidavit Filing Fee	\$0.00
RP-5217 Filing Fee	\$125.00
TP-584 Filing Fee	\$5.00
<b>Total</b>	<b>\$200.00</b>

**First:** Count the number of pages in the document you are submitting and enter that number in this box.

**Second:** Choose "Calculate Fees" and the breakdown of your fees will appear in the grid below.

Choose "next" to move to the Record & Return tab where you can enter the name and address indicated for Record & Return on your document:

**Returnee Address**

Name	<input type="text" value="John Jones, Esq."/>
Address 1	<input type="text" value="500 Main Street"/>
Address 2	<input type="text"/>
City	<input type="text" value="White Plains"/>
State	<input type="text" value="New York"/> <input checked="" type="checkbox"/>
Zip Code	<input type="text" value="10601"/>
Attn:	<input type="text"/>

If you are entering an address that you think you might need to enter again, please be sure to check off "Save to Address Book" so that this address is saved for the future.

Or, if you know you have an address in your address book you should:

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Payment Packet: 2009091307799001000 (Test Closing)      Land Document: 492560852 (Deed (DED))

Party      Property      Taxes      Cross Reference      Fee Calculation      Record & Return

Once your document has been recorded, you will be prompted to enter an address indicated as the "Record & Return" address on the document. Please enter that address below. Use your Address Book to locate an address previously entered.

If you would prefer to pick an address from your Address Book, please still enter the address indicated on the document, but be sure to check the box indicating that you will pick up your document from the office.

Open Address Book

Returnee Address

Name: John Jones  
Address 1: 500 Main Street  
Address 2:  
City: White Plains  
State: New York  
Zip Code: 10601  
Attrn:

Save to Address Book       Pick up

**Address Book**

Please select a Record & Return address from the list below. To permanently remove an address from your book, choose "Remove".

Company Name	Address	Actions
Jane Smith	123 Main Street, White Plains, NY 10601	Select   Remove
John Jones, Esq.	500 Main Street, White Plains, NY 10601	Select   Remove

< prev | finish >

Then click "Finish" and you will return to your packages screen. Choose "Print" to print the cover page for your Deed.

Current Package Description	Package Id	Status	Actions
Test Closing	2009091307799001000	Pending	Add Doc   Pay   Submit   View Letter
▲ ▼ Deed (DED) #492560852		Pending	Edit   Delete   <b>Print</b>
RP-5217 #492560853		Pending	Print
TP-584 #492560854		Pending	Print

If you are going to add another document, such as a Mortgage, to your package, you should choose "Add Doc" from this same screen. A pop-up will appear and you can choose your next document.

Current Package Description	Package Id	Status	Actions
Test Closing	2009091307799001000	Pending	<b>Add Doc</b>   Pay   Submit   View Letter
▲ ▼ Deed (DED) #492560852		Pending	Edit   Delete   Print
RP-5217 #492560853		Pending	Print
TP-584 #492560854		Pending	Print

If you do not have another document, you will want to choose "Pay". Payments will be discussed later in this outline.

# Creating A Mortgage Cover Page

To create a cover page for a mortgage, you will need to Create a Package with a mortgage. Or if you are adding a mortgage to an already existing package, you will need to choose "Add Doc" from the package grid and then choose Mortgage from the document type drop down.

You will then begin on the Party Screen:

After you enter all parties to the Mortgage, choose "next" to proceed to the Property Screen.

Once you have entered your property details, choose "next" to proceed to the Taxes Screen:

If you are claiming an exemption from mortgage tax, you will need to choose the affidavit you will be presenting in support of your exemption request from a drop down list. After choosing an affidavit a pop-up will appear.

The mortgage tax exemption pop-ups sometimes only require you to enter the number of pages for your affidavit and then choose "Add Exemption":

**252 Affidavit for Government Institutions or Reverse Mortgages**

If you are claiming a 100% exemption based upon the fact that the mortgagor is a government institution or because the mortgage being recorded is a reverse mortgage (NYS Tax Law § 252), please enter the number of pages of your Section 252 Affidavit and then choose Add Exemption.

Affidavit Page Count

Cancel | Add Exemption

Other times, you will be asked to enter amounts from your affidavit:

**339 Affidavit for First Sale of an Individual Condominium Unit**

Use Form 339ee to claim an exemption for the first sale of an individual condo unit. Begin by entering the number of pages of your Section 339ee Affidavit.

Affidavit Page Count

Please enter the reduced amount of your mortgage tax as calculated on your Section 339ee Affidavit and then choose "Add Exemption".

Basic	<input type="text" value="\$3,750.00"/>	Westchester	<input type="text" value="\$1,875.00"/>
Additional	<input type="text" value="\$2,220.00"/>	MTA	<input type="text" value="\$1,875.00"/>
Special	<input type="text" value="\$0.00"/>	Yonkers	<input type="text" value="\$0.00"/>

Cancel | Add Exemption

Be sure to choose "Add Exemption" so that your exemption appears in the grid and is reflected in the tax breakdown:

Exemption Affidavit(s)	Affidavit Page Count		Actions	
252 Affidavit for Government Institutions or Reverse Mortgages	1		Edit   Delete	

Tax Type	Basic	Westchester	Additional	MTA	Special	Yonkers	NYC	Total
Base Tax	\$3,750.00	\$1,875.00	\$2,220.00	\$1,875.00	\$0.00	\$0.00	\$0.00	\$9,720.00
Affidavit 252	-\$3,750.00	-\$1,875.00	-\$2,220.00	-\$1,875.00	\$0.00	\$0.00	\$0.00	-\$9,720.00
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Once you have entered any exemptions, choose "next" to proceed to the cross-reference screen.

If you do not have any cross-references, please choose "next" to proceed to the Fee Calculation Screen where you will enter the page count for your mortgage.

After you have calculated fees, choose "next" to enter your Record & Return address and finish entering data for this document.

# Creating a Payment Cover Page

Once you have created all of your cover pages, you should return to the Packages Screen as it is time to enter your payment details. To begin, choose "Pay" from the Actions menu to the right of your Package name.

Current Package Description	Package Id	Status	Actions
Test Closing	2009091307799001000	Pending	Add Document   <b>Pay</b>   Submit   View Letter
▲ ▼ Deed (DED) #492560852		Pending	Delete   Print
RP-5217 #492560853		Pending	Print
TP-584 #492560854		Pending	Print
▲ ▼ Mortgage (MTG) #492560855		Pending	Edit   Delete   Print
252 Affidavit for Government Institutions or Reverse Mortgages #492560856		Pending	Print
▲ ▼ Power of Attorney (PAT) #492570858		Pending	Edit   Delete   Print

Once you have clicked on "Pay", you will be directed to the PREP payment screen.



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[My Packages](#) | [My Account](#) | [Logout](#) | [Help](#)

Payment Packet: 2009091307799001000 (Test Closing)

*A payment cover page must accompany your payment to the Westchester County Clerk. To create this payment cover page, please enter your payment information and then choose Add Payment so that your payment details appear in the grid below.*

*If you are paying recording fees with a credit card, you will need to choose Process from the payment grid in order to process your credit card payment online.*

*If you are not using credit card, choose Print Payment Cover Page once all your payments have been entered.*

Document	Fees	Mortgage Taxes	Transfer Taxes	Total
Deed (DED) (492560852)	\$200.00	\$0.00	\$17,500.00	\$17,700.00
Mortgage (MTG) (492560855)	\$200.00	\$0.00	\$0.00	\$200.00
Power of Attorney (PAT) (492570858)	\$70.00	\$0.00	\$0.00	\$70.00
Total Amount	\$470.00	\$0.00	\$17,500.00	\$17,970.00
Total Amount Due	\$470.00	\$0.00	\$17,500.00	\$17,970.00

**First:** Review your receipt which shows a breakdown of the amounts due for each document in your package.

Payment Type:  Purpose:

**Second:** Choose the type of payment you will be making such as cash, check, ACH debit or credit card.

**Third:** Choose the payment purpose - fees, mortgage taxes or transfer taxes. Each must still be paid separately.

**Fourth:** Once you have filled in all required fields, choose "Add Payment" and your payment details will appear in the payment grid.

Print Payment Cover Page Draft | Return to Your Package Details



**Remember:** Fees, Mortgage Taxes and Transfer Taxes must each be paid separately in the Office of the Westchester County Clerk. If you submit a combined payment to our office, your payment will be rejected.

Once you have entered all of your payment details and they appear in the payment grid, choose "Print Payment Cover Page".

Payment Type	Payment Purpose	Total	Entry Status	Actions
Check #1234	Fees	\$470.00	Pending	Edit   Delete   Process
Check #485489252	Transfer Taxes	\$17,500.00	Pending	Edit   Delete   Process

[Print Payment Cover Page](#) | [Return to Your Package Details](#)

Your Payment Cover Page provides a summary of all of your payment details:

 <p>Office of the Westchester County Clerk</p>	 *20080919079940010011*
---	--

**Payment Cover Page**

**Submitter Information**

Name: Jane Smith Address 1: 123 Main Street Address 2: City/State/Zip: White Plains NY 10601	Phone: (914)555-5555 Fax: (914)555-5551 Email: jane@email.com Reference for Submitter: Test Closing 2
---	--

**Payment Due**

ControlNum	DocType	Fees	TransferTax	MortgageTax	Total
492620930	Deed (DED)	\$200.00	\$17,500.00	\$0.00	\$17,700.00
492620933	Mortgage (MTG)	\$195.00	\$0.00	\$9,720.00	\$9,915.00
492620934	Power of Attorney (PAT)	\$70.00	\$0.00	\$0.00	\$70.00
<b>Total Due :</b>					<b>\$27,685.00</b>

**Payment Details**

Payment Type	Payment Purpose	Entry Status	Total
Fees	Check # 1234	Pending	\$465.00
Mortgage Taxes	Check # 1235	Pending	\$9,720.00
Transfer Taxes	Cash	Pending	\$17,500.00
<b>Total Amount :</b>			<b>\$27,685.00</b>

You are able to pay fees only by credit card (American Express, MasterCard or Visa). To do so, indicate credit card as your payment type. Once your payment details appear in the grid, choose "Process":

Payment Type	Payment Purpose	Total	Entry Status	Actions
Check #485489252	Transfer Taxes	\$17,500.00	Pending	Edit   Delete   Process
Card# NOT YET PROVIDED	Fees	\$470.00	Pending	Edit   Delete   <b>Process</b>

You will be redirected to the Credit Card Payment Processing screen where previously entered information will pre-fill fields and you must complete the remaining fields:



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[My Packages](#) | [My Account](#)

[Logout](#) | [Help](#)  
[Return to Payments](#)

Payment Packet: 226654 (Test Closing)

Please complete the following fields and then choose Process Credit Card. Your credit card will be immediately processed.

Credit Card Details	Fees	Status
Card #: NOT YET PROVIDED	\$470.00	Pending

First Name:

Company:

Address:

City:

E-Mail:

Credit Card:

Card Number:

Exp. Date:

Amount: \$470.00

Middle Name:

Last Name:

State:

Phone:

CVV Number:  *What is this?*

Zip Code:

Fax:

**First:** Fill in all required fields.

**Second:** Choose "Process Credit Card".

[Process Credit Card](#)

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Version: 1.0.0.0



**Warning:** Your credit card will be processed immediately. If you do not want your credit card processed until you are ready to submit the documents, please wait until just before you submit the documents to process this credit card payment.

Once you have printed your Payment Cover Page, you should return to your package details by clicking on "Return to Package Details" below the payment grid.

Payment Type	Payment Purpose	Total	Entry Status	Actions
Check #485489252	Transfer Taxes	\$17,500.00	Pending	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Process</a>
Card #*****0002	Fees	\$470.00	Paid	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Process</a>

[Print Payment Cover Page](#)    [Return to Your Package Details](#)

You are now ready to submit your package to the Office of the Westchester County Clerk.

# Submitting A Package to the Office of the Westchester County Clerk

Before you log out of PREP, you will need to tell us that we should be expecting your package in our office. To do this, you need to “Submit” your package. You will not be able to submit your package until you have done three things:

- You have completed all required fields for your cover pages and any required tax forms; and
- You have printed all of your cover pages and any required tax forms; and
- You have printed your Payment Cover Page.

The “Submit” button will remain grey until these three items have been completed. Upon completion, the “Submit” button will become an active blue link and you can click on it to submit your package:

Current Package Description	Package Id	Status	Actions
Test Closing	2009091307799001002	Pending	Add Doc   <b>Submit</b>   Withdraw
▲ ▼ Deed (DED) #492560852		Pending	Edit   Delete   Print
RP-5217 #492560853		Pending	Print
TP-584 #492560854		Pending	Print
▲ ▼ Mortgage (MTG) #492560855		Pending	Edit   Delete   Print
252 Affidavit for Government Institutions or Reverse Mortgages #492560856		Pending	Print
▲ ▼ Power of Attorney (PAT) #492570858		Pending	Edit   Delete   Print

Once you have chosen submit, you will be warned that the package will be removed from your active packages screen. Once you say “OK” this package will not longer be listed in the current packages grid. You can, however, choose “View Submitted Packages” to check on its status.



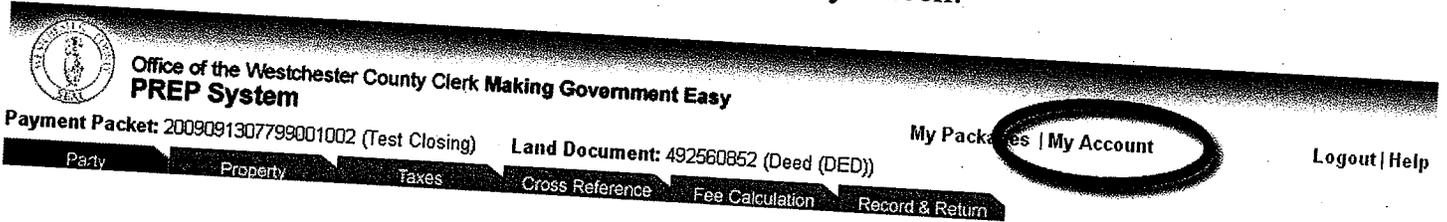
**Warning:** We cannot and will not begin processing your papers until we have received them in our office. You must mail or deliver your submissions along with the correct cover pages, supporting papers and necessary payments to the Office of the Westchester County Clerk.



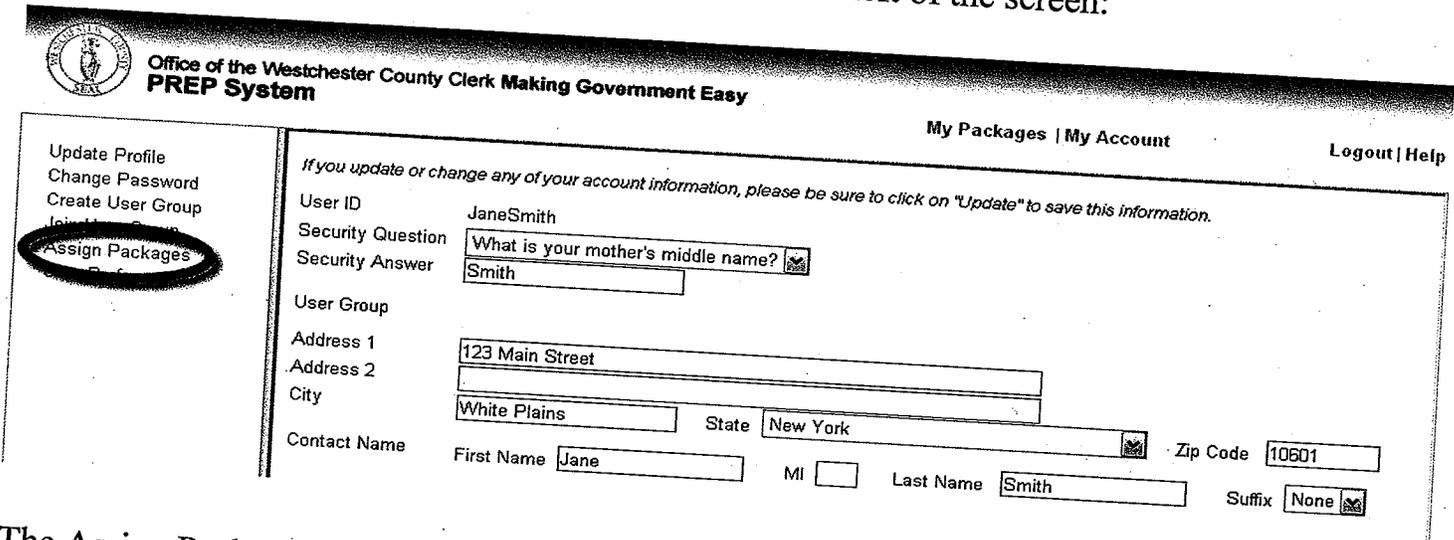
**Note:** We will no longer accept submissions that contain staples. Your documents must be placed in order and secured with a clip, not a staple. Documents containing staples will be rejected.

# Assigning Your Package

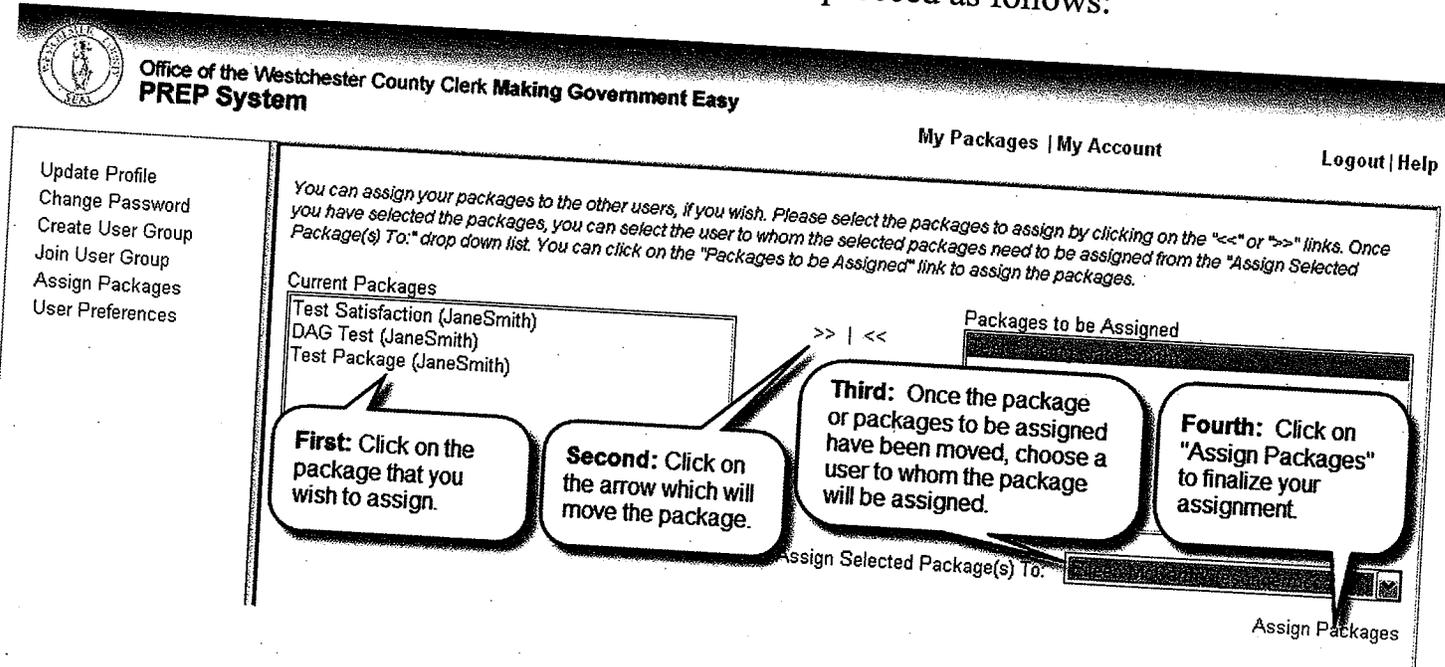
If you have started creating a package but would like another PREP user, such as a title company, to complete and submit your package, you can assign your package to another PREP user. To do so, click on "My Account" at the top of any screen:



Then choose "Assign Packages" from the menu on the left of the screen:



The Assign Packages Screen will appear and you can proceed as follows:





**Warning:** Once you have assigned a package, **you will no longer be able to view the package.** If you need the package back for any reason, you will need to contact the user you have assigned it to and request that he or she assign it back to you.

Once you have successfully assigned your package, you will receive an Assignment Confirmation which you should print out or save:



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**PREP System**

### Assignment Confirmation

Package Name: DAG Test  
Assigned By: JaneSmith (Jane Smith 1)  
Assigned To: esongermccarthy (Eileen S McCarthy 1)  
Date: 9/19/2009  
Time: 4:39 PM  
Documents: Deed Agreement (DAG)#492610911



**Why would you need the Assignment Confirmation?** In some situations, title companies will need access to the PREP package created by a Seller's attorney in order to submit the returns and closing documents for recording. We will remain open to feedback from the bar and the title industry as to whether this Assignment Confirmation will meet the needs of the bar and the title industry.

## A View of PREP from the County Clerk's Office

With the launch of the PREP System, the way we handle your papers in our office is going to change. We hope that providing you with an understanding of how we review your documents will help you to avoid rejection of your submission.

### PREP Intake

The first employees to review your submission are our intake staffers. They are going to review both your documents and your payments. They are performing a careful but limited review before sending your documents off to be scanned and your payments off to be processed by our Finance Unit.



The PREP Intake Staffer will review your payment to be sure:

- The details listed on your Payment Cover Page match the payment submitted

For example, if you have indicated you are submitting a bank, certified or official check, the intake staffer will be sure that your check is in fact a bank, certified or official check.

- All payments have been submitted
- Your check is made payable to our office
- Your check is not stale-dated
- Your check is signed
- If you have indicated a cash payment, a receipt indicating the correct amount is attached



**Tip:** Payments via ACH debit or credit card do not require review and are therefore a preferred payment method. Consider setting up an ACH account and giving it a try. We think once you have made an ACH payment, you will see the benefits.



The PREP Intake staffer will review your documents to be sure:

- All required parties have signed the document
- All signatures are original
- Acknowledgements are in proper form
- Notary Information is complete
- There are no cross-outs on your tax forms
- Any required seals are present
- Required support papers have been submitted
- The document is suitable for scanning
- All staples have been removed

### What happens if there is a problem at the Intake stage?

Our goal is to move your documents forward if they pass intake. So even if your money is not in order, we will begin processing your documents. Our intake staffers will route your money and documents as follows:



\$ to Finance  
Docs to Scanning



\$ and Docs Returned to Submitter



\$ and Docs Returned to Submitter



\$ Returned to Submitter  
Docs to Scanning

# PREP Scanning

If your documents are accepted at Intake, they will move from Intake to Scanning. We scan all land records in our office so the move from Intake to Scanning should occur within a few hours.

Please be sure that the documents you submit to our office are suitable for scanning. We always make our best efforts to move the process forward, but if your documents are illegible, we will not forward them to scanning.

# PREP Examination

A full review of your land records package takes place in examination. Our examiners will be reviewing both the imaged document you have submitted and the details you have entered into the PREP System:

**PREP Examination** My Packages [Logout](#) | [Help](#)

Get Next (OR) Search in Queues

Payment Packet Details	Status	Actions
2009091007763001001 (339 ee TEST)	Pending	Letter   Finalize   Close
<b>Deed (DED) #492530836</b>	<b>Pending</b>	View
RP-5217 #492530836	Pending	View
TP-584 #492530837	Pending	View
Power of Attorney (PAT) #492530839	Pending	View
Mortgage (MTG) #492530840	Pending	View
339 Affidavit for First Sale of an Individual Condomini	Pending	View

**Deed (DED) #492530836**

Prev | Next

- Document Date
  - 8/3/2009
- Parties
  - 1ST : HARBOUR LANE ASSOCIATES LLC / None (Corporation)
  - 2ND : MCNAMARA, JAMES / None
- Required Elements
  - Signature(s)
  - Acknowledgment in proper form
  - TP-584
  - RP-5217
  - Notary Verification
- Properties
  - New Rochelle 2-490-12
- Amounts
  - Conveyance Amount: \$351,400.00
- Cross References
- Supplemental Documents

510903534

ST  
NMO

DEED

THIS INSTRUMENT made the 3rd day of August, 2009  
 BETWEEN HARBOUR LANE ASSOCIATES, LLC, a New York Limited Liability Company, having its principal place of business at 6 Chester Avenue, White Plains, New York 10601, Grantor,  
 And  
 JAMES McNAMARA, residing at 1615 Edison Avenue, Bronx, New York 10461, Grantee

WITNESSETH, that the Grantor, in consideration of Ten Dollars and other valuable consideration paid by the Grantee, does hereby grant and release unto the Grantee, the heirs or successors and assigns of the Grantee forever,

The Unit designated as Unit No. 2B (hereinafter called "The Unit") in the Building situate at 2 Harbor Lane, City of New Rochelle, County of Westchester and State of New York, designated and described as Unit No. 2B in the Declaration and any amendments thereto establishing HARBOR VIEW CONDOMINIUM I, (hereinafter called the "Property"), made by the Grantor under the Condominium Act of the State of New York (Article 9-B of the Real Property Law of the State of New York), dated July 27, 2007, and recorded in the Office of the Westchester County Clerk, Division of Land Records, on the 11th day of February, 2008, in Control No. 480360208, (hereinafter called the "Declaration") and designated as Section 2, Block 490, Lot 1002 on the tax map of the Town of Mount Pleasant, New York and on the Floor Plans of the Building, certified by Salvatore F. Vasi, A.I.A., Licensed Architect, on the 31<sup>st</sup> day of May, 2007, and filed simultaneously with the Declaration.

BEING AND INTENDED TO BE a portion of the same premises conveyed by Marjo Realty Corp., dated 6/23/04 and recorded 12/27/04 in Control No. 442670355.

The land area of the property is described as follows:

ALL that certain plot, piece or parcel of land, with the buildings and improvements thereon



**Warning:** Any document with a substantive recording defect has been and will continue to be rejected. However, incorrectly entering a document in the PREP System can also lead to your document being rejected so please be careful when entering information into the PREP System.



## PREP Rejection Supervisor

We are mindful that nothing frustrates our land records customers more than multiple rejections of the same documents. As a result, all of our post-intake rejections will be reviewed by a rejection supervisor to be sure that:

- The rejection reason chosen by our examiner is correct.
- The rejection reason is conveyed clearly to the customer.
- Multiple reasons for rejection, if applicable, are listed.

## PREP Financial Reconciliation

Unlike our current procedure where your entire package will be rejected if your payment is incorrect, PREP payments by cash, check and credit card are initially processed without regard to correctness. They are simply recorded and deposited.

Once your package has passed through Intake, Scanning and Examination, the PREP System will indicate to our Finance staff that your package falls into one of three categories:

- ✓ **Proper Payment Made:** Your documents will be recorded and returned.
- ⬆ **Overpayment:** Your documents will be recorded and returned. You can apply for a refund.
- ✗ **Underpayment:** Your documents will be accepted, but not recorded and will be held pending receipt of the additional payment due.



**Remember:** If you pay by ACH, underpayments and overpayments are never an issue. Your payment will not be processed until the end of our review when we know exactly what the fees and taxes will be.

Further, if only your payment is problematic, only your payment will be returned to you. We will hold your documents until proper payment is submitted. Once your payment is processed, your documents will be recorded and returned as requested.



**Warning:** Our office is willing to hold “accepted” documents as we do not want to re-examine re-submitted documents as this is inefficient. However, we cannot hold documents indefinitely. Therefore “accepted” documents which are left in our office for more than 30 days will be rejected and will need to be resubmitted.

## PREP Package Status and Trouble-Shooting

It is important to our office that you can quickly, easily and accurately see the status of any PREP Package. You will be able to see in real time whether your package is in Intake, Scanning or Examination. You will also be able to view rejection reasons as soon as they are issued. We hope that you will use features of the PREP System to track your package through the recording process and we hope that alerting you quickly to rejections will help to speed up overall recording time when a document needs to be re-submitted to our office.

## Viewing the Status of Submitted Packages

To view the status of a package, choose “View Submitted Packages” from your Packages Screen:



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[My Packages](#) | [My Account](#) | [Logout](#) | [Help](#)

**Welcome, JaneSmith**

Documents enter the Westchester County Clerk's office in 'packages' or groups of related documents. Your package may consist of only one document, such as a Satisfaction of Mortgage. Or, your package may consist of many documents such as a Deed, Mortgage, Power of Attorney and tax forms all related to the same land transaction. Once you have chosen a name that will help you identify your package (such as 'Smith Closing'), you are ready to... **Create A Package**

Use the blue arrows to change the status of that documents within your package. All be displayed. If you wish to learn the status of packages which are no longer pending because they have been submitted, you can **View Submitted Packages**

The grid below lists all of the pending packages created by you or any other member of your user group. To view additional details about a package, double click on the package row and additional details about your package will be displayed at the top of the grid.

Current Package Description	Package Id	Status	Actions	
No package is currently selected by the user.			Add Doc   Pay   Submit   View Letter	
Package Description	Package Id	Status	Created By	Created
Test Closing	2009091307799001002	Pending	JaneSmith	09/13/2009
Test Satisfaction	2009091307800001000	Pending	JaneSmith	09/13/2009
Test Package	2009091907991001000	Pending	JaneSmith	09/19/2009
Test Judgment 2	2009091907993001001	Pending	JaneSmith	09/19/2009
Test Closing 2	2009091907994001001	Pending	JaneSmith	09/19/2009

You will then see a grid similar to this Packages Grid:



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**PREP System**

[My Packages](#) | [My Account](#) | [Logout](#) | [Help](#)

The grid below lists all of the submitted packages created by you or any other member of your user group. To view additional details about a submitted package, double click on the package row and additional details about your package will be displayed at the top of the grid.

To search for a submitted package, please fill in one of the following fields and click "Search".

Package Description  (OR) Package ID

(OR) Date Created between  and  Clear | Search

Search for a package by description, package ID or date range.

Current Package	Package Key	Created	Actions
Test Judgment	2009091907992001001	9/19/2009	Print
Judgment, Certified Copy (JDG) #492620928			Print
Package Description	Package Key	Created	Status
Jane Smith POA	2009091807983001001	09/18/2009	Intake
<b>Test Judgment</b>	<b>2009091907992001001</b>	<b>09/19/2009</b>	<b>Scanning</b>
Test 3	2009091907995001001	09/19/2009	Intake

Once you have located your package, you can see where in our workflow it is.

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You will not see rejected packages in this grid as rejected packages are returned to your active packages grid for action.

## Viewing Rejection Letters

A rejected package will return to your current packages grid upon final rejection by our staff:



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[My Packages](#) | [My Account](#) | [Logout](#) | [Help](#)

**Welcome, JaneSmith**

Documents enter the Westchester County Clerk's office in 'packages' or groups of related documents. Your package may consist of only one document, such as a Satisfaction of Mortgage. Or, your package may consist of many documents such as a Deed, Mortgage, Power of Attorney and tax forms all related to the same land transaction.

Once you have chosen a name that will help you identify your package (such as 'Smith Closing'), you are ready to... **Create A Package**

Use the blue arrows to change the order that documents within your package will be displayed. If you wish to learn the status of packages which are no longer pending because they have been submitted, you can **View Submitted Packages**

The grid below lists all of the pending packages created by you or any other member of your user group. To view additional details about a package, double click on the package row and additional details about your package will be displayed at the top of the grid.

Current Package Description	Package Id	Status	Actions	
No package is currently selected by the user.			Add Doc   Pay   Submit   View Letter	
Package Description	Package Id	Status	Created By	Created
Test Closing	2009091307799001002	Pending	JaneSmith	09/13/2009
Test Satisfaction	2009091307800001000	Pending	JaneSmith	09/13/2009
Test Package	2009091907991001000	Pending	JaneSmith	09/19/2009
Test Judgment 2	2009091907993001001	Pending	JaneSmith	09/19/2009
Test Closing 2	2009091907994001001	Pending	JaneSmith	09/19/2009
Test 3	2009091907995001001	Rejected	JaneSmith	09/19/2009

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Version: 1.0.0.0

If you click on the package description to expand the details and then choose "View" you will be able to view the rejection letter which will be mailed to you:

Current Package Description	Package Id	Status	Action
Test 3	2009091907995001001	Rejected	Add Doc   Pay   Submit   <b>View Letter</b>
Power of Attorney (PAT) #492620938		Rejected	Edit   Delete

The rejection letter will list a specific reason or reasons for the rejection of your document or payment. We hope that being able to view it as soon as it is issued will help improve recording times.

## PREP E-mail Alerts

The PREP System will provide you with e-mail alerts about your package:

- Notification of Rejection or Payment Issues including:
  - Document Rejection
  - Payment Rejection
  - Underpayment of fees or taxes
- Notification that your package has been recorded

E-mail alerts will be sent to the e-mail address on file for the user who submitted the document.

## Resubmitting Rejected Documents

Once a rejected package has been returned to your active packages grid, you can treat it like you would any current package:

- Correct either the document itself or the information entered into PREP
- Reprint the necessary cover pages
- Submit your document through PREP
- Deliver your package to our office

## **Correcting Underpayments**

If you have underpaid for your package, we will not be able to record your documents until you have submitted the remaining amount due. Once we have confirmed that you have underpaid, the package will be returned to your active packages grid. Please enter the details for your payment due, print your Payment Cover Page, submit your package and forward your Payment Cover Page and payment to our office.

## **Refunding Overpayments**

If you have overpaid for your package, we will record your documents and alert you that you have overpaid. You will be able to submit a request for a refund of your overpayment. If this request has not been received within thirty days, the overpayment will be turned over to the county.

## **Questions or Concerns about PREP?**

Let us know:

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