# PARTNERSHIP GUIDE

## for County Auditors & Recording Managers

# SECTIONS

# APPENDICES

# What's a Transfer Partnership?

## SUMMARY

We offer a centralized repository and website for preserving and providing managed public access to county recordings!

What does it look like to be one of our Transferring Partners? Each month, you'll upload your new recordings to the Digital Archives. Website users can search for, view, and order copies of the documents. While access to the indexing is a standard feature, you decide whether images of the original documents are viewable on our website or not.

## OUR JOB

- Preserve copies of your recordings
- Manage public access per your instructions.
- Train you to use our simple tools.
- Forward orders for certified copies received through our e-commerce system; collect your fees and disburse them to you quarterly.
- Manage your User accounts.
- Provide a Partner Portal dashboard.
- Give you excellent customer service!

## YOUR JOB

- Run a monthly extract of new images and indexing from your recording system and transfer using our upload tool, Archive This.
- Certify and mail copies of documents to customers who order through our website.

## SUMMARY

Those interested in becoming transferring partners should request a consultation. This meeting allows us to introduce ourselves, clarify items in this Partnership Guide, and ask/answer questions. It also prepares you to determine when to commit to an onboarding project (see Appendix A).

*There is no obligation to proceed with a Partnership after the consultation. We've had counties wait years before being ready to make the commitment.*

## YOUR JOB

- Ask and answer questions during the consultation

## OUR JOB

- Schedule a Teams consultation.
- Ask and answer questions during the consultation

# SUMMARY

Transferring your recordings monthly and fulfilling certified copy orders will become routine, but first you'll work with an archivist and a DA developer for an 8-week onboarding project.

*See Appendix A for the onboarding project schedule.*

# YOUR JOB

- Commit to and participate in an 8-week onboarding project.

# OUR JOB

- Commit to and participate in an 8-week onboarding project.

## SUMMARY

During the onboarding project, we program your Doc Codes into our system along with your choices for online access of the records (access is at the Doc Code level) and which DA series to assign each Doc Code to. See Appendix B for a sample Doc Code spreadsheet and more details on the choices you must make.

## OUR JOB

- Load your Doc Codes and access/series choices into our system.

## YOUR JOB

- Decide which of your Doc Codes will be transferred to the DA system.
- Complete the Doc Code spreadsheet.
- After becoming a transferring partner, submit new Doc Codes using the link in the Partner Portal dashboard.

# Fullfilling Certified Copy Orders

## Summary

Website users can order certified copies of your recordings through our website. We set the pricing at the current fee defined in RCW 36.18.010. Note: Pricing is set at the DA category level, and not at the Doc Code level.

We take online orders from addresses within the continental U.S. only. All out of country requesters are directed to your office.

## Our Job

- Provide you with certified copy orders that must be fulfilled.
- Collect the fees for the orders.
- Disburse your accrued fees after the end of each fiscal quarter (done by Secretary of State's Fiscal department).

## Your Job

- Certify and mail documents that are ordered through our website.
- Click the "Fulfilled" link in the email so we know your part is done.

# Archive This: Our Transfer Tool

## SUMMARY

You'll transfer your recordings using our upload tool, *Archive This*. We validate and fingerprint the files in the process. We train you to use *Archive This*, which features screens customized for your recording system.

## YOUR JOB

- Use (and do not share) your individual username and password for *Archive This*.
- Queue up each extract and upload the batches.
- Correct any errors that occur in the transfer process.
- Manage the ingestion reports we send you, following the retention schedule (GS2010-021)

## OUR JOB

- Validate and fingerprint each incoming file.
- Preserve your recordings in the DA system.
- Send you two ingestion reports per batch—one telling you the files are queued for preservation, and one telling you when the transfer is complete.
- Back up your records.

## SUMMARY

While most of the records you transfer to the DA are searchable and viewable on our website, you'll want access to ALL records you've transferred. *Web Admin* allows you to view all transferred recordings and to edit indexing, if needed.

## OUR JOB

- Assist with indexing corrections, if needed.
- Update Users' permissions in a timely manner

## YOUR JOB

- Manage your users' permissions with security in mind. Those with permissions to "read" and to "write" in *Web Admin* have access to all of your transferred recordings.
- Update indexing for previously transferred recordings when you make changes in your own recording system.

# The Partner Portal: Our Dashboard Tool

## SUMMARY

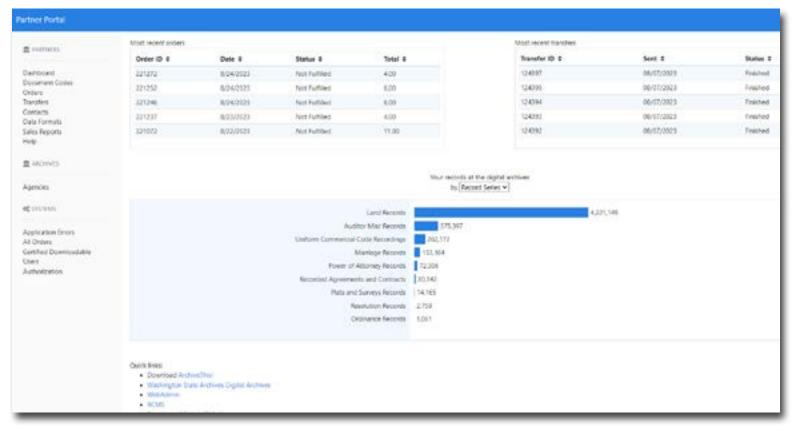The *Partner Portal* is a dashboard from which you can access the information described on the following page.

## YOUR JOB

- Notify the archivist if you have a departing or a new staff member.
- Keep your information current in the *Partner Portal* account for your agency.

## OUR JOB

- Manage User accounts.
- Approve new Doc Code submissions.
- Respond to your "Help" emails.

# The Partner Portal: Our Dashboard Tool



What you will see when you login to the *Partner Portal* Dashboard

**DOCUMENT CODES** see existing doc codes in our system and add new ones

**TRANSFERS** a list of your recent transfers to the DA

**SALES REPORTS** a sales report of copy fees collected by Archives on your behalf

**HELP** need help? Send us a request through this screen

**ORDERS** fulfilled and unfulfilled copy orders

**DATA FORMATS** a guide to data format for exporting. Helpful for your IT personnel

**CONTACTS** a list of who in your office has which roles with DA notifications. And you can add or delete contacts

# When Changes Happen

## SUMMARY

Changes happen, and you will need to take action with the following:

- migrating to a different recording system
- changing your financial institution
- adding or removing staff User accounts.

**See Your Job sections for actions to take for each of these scenarios!**

## STAFF TURNOVER IN YOUR OFFICE

- Contact us at partnersupport@sos.wa.gov (or use the Help link in the *Partner Portal* dashboard) to add or delete User accounts
- Request training for new Users if you are not prepared to do so yourself.

## YOUR JOBS

## CHANGING FINANCIAL INSTITUTIONS

- Download an authorization form from OFM **here** to modify your existing Direct Deposit arrangements. Send the completed form to **payeeforms@ofm.wa.gov**.

## MIGRATING TO A DIFFERENT RECORDING SYSTEM

- Inform us in a timely manner so that we can plan for the change. Changing recording systems requires you to go through an onboarding project again.

## SUMMARY

Your recordings can be searched using a name search or a detailed search within each series. Scanned images of the original documents can be viewed (if you choose) and ordered online. If you allow online viewing of images, we can watermark them "Unofficial."

The title page within each of your series contains useful information for the public, such as which Doc Codes are found in which series, and a histogram that visually diagrams the number of records preserved by recording year.

## OUR JOB

- Manage your records in our system so they show up correctly online.
- Run a program that helps filter private information (100% accuracy **not** guaranteed).

## YOUR JOB

- Edit (in *Web Admin*) or re-transfer recordings (using same recording number), as needed.
- Review the histogram on each of your title pages to identify and fill gaps in your transfers.

# Appendix A
## Schedule for the onboarding project

Onboarding a new transferring Recording department is an 8-week project that requires commitment from you, your staff, your IT person, and possibly your vendor. Once started, if you cannot adhere to the schedule, we'll ask you to move to the end of the queue to give others the opportunity. The first step in becoming a transferring partner is to participate in a consultation with us. Your readiness to start an onboarding project should be determined after the consultation. Project start dates are moving targets, so check with us for the next available opening.

Here is a schedule for steps in the onboarding project:

## WEEKS 1-2:

- Agency works with DA archivist to complete paperwork (TA and TIP), user accounts, and Document Codes
- DA developer answers agency IT questions about extract requirements provided during consultation

## WEEKS 2-5:

- Agency IT creates export program and conducts test transfers with DA developer

## WEEKS 5/6:

- DA archivist trains agency on *Archive This*, *Web Admin*, and *Partner Portal* dashboard
- DA ships hard drive to agency

## WEEKS 6/7:

- Agency exports records onto hard drive (using *Archive This* program)

## WEEKS 7/8:

- Agency returns hard drive to DA
- DA uploads files and QCs transfer with agency

# APPENDIX B
## DOCUMENT CODES

Sample of rows from a Doc Code spreadsheet:

| Doc Code | Title | DA Record Category | Show Index Online? | Show Image Online? | Grantor Description | Grantee Description |
|---|---|---|---|---|---|---|
| APPT | Appointment | Auditor Misc Records | Yes | Yes | Beneficiary | New Trustee |
| MARR_APP | Marriage Application | Marriage Records | Yes | No | Person A | Person B |
| PTREL | Partial Release | Land Records | Yes | Yes | Beneficiary | Borrower |
| VET | Veteran Disclosure Discharge Papers | Military Records | No | No | Signature | Veteran |

List of DA Record Categories (for Column C):

- Auditor Misc Records
- Land Records
- Marriage Records
- Military Records
- Minutes and Meeting Records
- Ordinance Records
- Plats and Surveys Records
- Power of Attorney Records
- Professional License Records
- Recorded Agreements and Contracts
- Resolution Records
- Uniform Commercial Code Recordings