

# **Indexing Requirements for Electronic Recording**

## *Westchester County, New York*

### **Package Level Requirements**

Documents enter the Office of the Westchester County Clerk as part of a package which contains one or more documents and payment for those documents. The following list contains the required information which must be provided for each package.

Submitter Information (required)

Payment Information (required)

### **Document Level Requirements**

The following is a list of all documents which can be electronically submitted to the Office of the Westchester County Clerk. The list contains the name of each document, the document abbreviation, a brief description of the document and the information required to be submitted along with the image of each document.

**Affidavit (AFF):** An affidavit is a written statement sworn to be true before someone authorized to administer an oath. This document type should be chosen for a general affidavit or an affidavit of lost assignment. It should not be chosen for a mortgage affidavit.

First Party (required)

Property (required)

Cross Reference (optional)

Document Page Count (required)

Record & Return Information (required)

**Agreement (AGR):** A legal binding document, other than a deed agreement, made between two or more parties and pertaining to real property. This document type should be chosen for agreements regarding real property, but not a specific property.

First Party (required)  
Cross Reference (optional)  
Document Page Count (required)  
Record & Return Information (required)

**Affidavit of Service (AOS):** An affidavit which sets out the manner, time and place that a particular document was served on a person. It is most commonly filed by a governmental office in connection with the appropriation of property by New York State.

First Party (required)  
Property (required)  
Document Page Count (required)  
Record & Return Information (required)

**Assignment of Lease and Rents (ALR):** An Assignment of Lease is a contract which assigns all title, right and interest in a lease to another party. An Assignment of Rents is a contract which assigns all title, right and interest in rent or other income from a property to a party and is utilized by lenders in the event of a default in the payment of a mortgage on a property.

First Party/Assignor (required)  
Second Party/Assignee (required)  
Property (required)  
Taxable Mortgage Amount (required)  
Mortgage Date (required)  
Dwelling Type (required)  
Section 255 Affidavit (required)  
Affidavit Page Count (required)  
Cross Reference (required)  
Document Page Count (required)  
Record & Return Information (required)

**Assignment of Mortgage (ASS):** An assignment is a legal document which transfers the rights and duties of one party to another party.

- First Party/Assignor (required)
- Second Party/Assignee (required)
- Property (required)
- Cross Reference (required)
- Document Page Count (required)
- Record & Return Information (required)

**Cancellation of Agreement (CAG):** A cancellation of a prior recorded agreement made between two or more parties and pertaining to real property.

- First Party (required)
- Cross Reference (required)
- Document Page Count (required)
- Record & Return Information (required)

**Cemetery Deed (CEM):** A cemetery deed is a document transferring title to a cemetery plot.

- First Party/Grantor/Transferor/Seller (required)
- Second Party/Grantee/Transferee/Buyer (required)
- Property (required)
- Cross Reference (optional)
- Document Page Count (required)
- Record & Return Information (required)

**Commitment (CMT):** A commitment for land and agriculture is recorded to confirm an agricultural assessment from the State of New York.

- First Party (required)
- Property (required)
- Document Page Count (required)
- Record & Return Information (required)

**Contract (CNT):** A written agreement between two or more parties to perform or refrain from performing certain acts which is supported by consideration. Only a contract pertaining to a specific piece of real property located within Westchester County can be presented for recording.

- First Party (required)
- Second Party (required)
- Property (required)
- Date of Conveyance (required)
- Document Date (required)
- Lien Deduction (required)
- Consideration (required)
- Sales Price (required)
- Percentage of Real Property (required)
- Form IT-2663 Required (required)
- Exemption/Tax Credits (required)
- Form TP-584 (required)
- Cross Reference (optional)
- Document Page Count (required)
- Record & Return Information (required)

**Correction Deed (SDE):** Also known as a sundry deed, this document type should be chosen when a prior recorded deed is being corrected. The deed must be signed by the same parties as the original deed and must reference the original deed.

- First Party/Grantor/Transferor/Seller (required)
- Second Party/Grantee/Transferee/Buyer (required)
- Property (required)
- Date of Conveyance (required)
- Document Date (required)
- Lien Deduction (required)
- Consideration (required)
- Sales Price (required)
- Percentage of Real Property (required)

Form IT-2663 Required (required)  
Exemption/Tax Credits (required)  
Form TP-584 (required)  
Form RP-5217 (required)  
Cross Reference (required)  
Document Page Count (required)  
Record & Return Information (required)

**Correction Mortgage (SMT):** Also known as a sundry mortgage, this document type should be chosen when a prior recorded mortgage is being corrected. The mortgage must be signed by the same parties as the original mortgage and must reference the original mortgage.

First Party/Mortgagor/Borrower (required)  
Second Party/Mortgagee/Lender (required)  
Property (required)  
Taxable Mortgage Amount (required)  
Mortgage Date (required)  
Dwelling Type (required)  
Mortgage Tax Exemption Affidavit (optional)  
Affidavit Page Count (required if affidavit)  
Cross Reference (required)  
Document Page Count (required)  
Record & Return Information (required)

**Certificate (CTF):** A certificate pertaining to real property such as a certificate of zoning lot act specifying the type of use to which property may be put in a specific area or a certificate issued by the Veteran Administration to someone who qualifies for a Veteran Administration Loan.

First Party (required)  
Second Party (optional)  
Property (required)  
Cross Reference (optional)  
Document Page Count (required)  
Record & Return Information (required)

**Declaration (DLR):** A legal document which creates a condominium and includes a description of the property, the uses to which is it restricted, a description of individual ownership units, common elements and procedures for amending the declaration.

- First Party (required)
- Second Party (required)
- Property (required)
- Date of Conveyance (required if TP-584 required)
- Document Date (required if TP-584 required)
- Lien Deduction (required if TP-584 required)
- Consideration (required if TP-584 required)
- Sales Price (required if TP-584 required)
- Percentage of Real Property (required if TP-584 required)
- Form IT-2663 Required (required if TP-584 required)
- Exemption/Tax Credits (required if TP-584 required)
- Form TP-584 (optional)\*
- Cross Reference (optional)
- Document Page Count (required)
- Record & Return Information (required)

\*A TP-584 will be required when recording a declaration in which there are first and second parties.

**Dedication (DCN):** An agreement in which the ownership of streets or roads is conveyed to a municipality.

- First Party (required)
- Second Party (required)
- Property (required)
- Date of Conveyance (required)
- Document Date (required)
- Lien Deduction (required)
- Consideration (required)
- Sales Price (required)

Percentage of Real Property (required)  
Form IT-2663 Required (required)  
Exemption/Tax Credits (required)  
Form TP-584 (required)  
Cross Reference (optional)  
Document Page Count (required)  
Record & Return Information (required)

**Deed (DED):** Written document by which an interest in property is transferred from one party to another. This document type should be chosen for a bargain and sale deed, an administrator's deed, an executor's deed or a quit claim deed.

First Party/Grantor/Transferor/Seller (required)  
Second Party/Grantee/Transferee/Buyer (required)  
Property (required)  
Date of Conveyance (required)  
Document Date (required)  
Lien Deduction (required)  
Consideration (required)  
Sales Price (required)  
Percentage of Real Property (required)  
Form IT-2663 Required (required)  
Exemption/Tax Credits (required)  
Form TP-584 (required)  
Form RP-5217 (required)  
Cross Reference (optional)  
Document Page Count (required)  
Record & Return Information (required)

**Deed Agreement (DAG):** An agreement referring to a specific parcel of real property, such as a boundary line agreement.

- First Party (required)
- Second Party (required)
- Property (required)
- Date of Conveyance (required)
- Document Date (required)
- Lien Deduction (required)
- Consideration (required)
- Sales Price (required)
- Percentage of Real Property (required)
- Form IT-2663 Required (required)
- Exemption/Tax Credits (required)
- Form TP-584 (required)
- Cross Reference (optional)
- Document Page Count (required)
- Record & Return Information (required)

**Easement (EAS):** An easement allows another party the right to use land for a specific purpose. The most common easements are those granted to a public utility or telephone company to run lines over or under private property. An easement could also grant access to a common driveway or the right to cross an adjacent property.

- First Party/Grantor and/or Grantee (required)
- Second Party/Grantee and/or Grantor (required)
- Property (required)
- Date of Conveyance (required)
- Document Date (required)
- Lien Deduction (required)
- Consideration (required)
- Sales Price (required)
- Percentage of Real Property (required)
- Form IT-2663 Required (required)

Exemption/Tax Credits (required)  
Form TP-584 (required)  
Cross Reference (optional)  
Document Page Count (required)  
Record & Return Information (required)

**Judgment (JDG):** A judgment is a final decree from a court on the respective rights and claims of the parties to an action. A certified copy of the judgment must be presented for filing.

First Party/Party to Judgment (required)  
Property (optional)  
Cross Reference (optional)  
Document Page Count (required)  
Record & Return Information (required)

**Lease Agreement (LAG):** Use this document type to record a lease or any document which refers to a recorded lease such as an assignment of lease or a termination of lease.

First Party (required)  
Second Party (required)  
Property (required)  
Date of Conveyance (required if TP-584 required)  
Document Date (required if TP-584 required)  
Lien Deduction (required if TP-584 required)  
Consideration (required if TP-584 required)  
Sales Price (required if TP-584 required)  
Percentage of Real Property (required if TP-584 required)  
Form IT-2663 Required (required if TP-584 required)  
Exemption/Tax Credits (required if TP-584 required)  
Form TP-584 (optional)\*  
Cross Reference (optional)  
Document Page Count (required)  
Record & Return Information (required)

\*A Lease Agreement, Assignment of Lease or a Termination of Lease requires a supporting TP-584.

**Letters of Patent (LOP):** A document issued by a government to grant a right or convey a title to an individual or organization.

- First Party/Grantor/Transferor/Seller (required)
- Second Party/Grantee/Transferee/Buyer (required)
- Property (required)
- Date of Conveyance (required)
- Document Date (required)
- Lien Deduction (required)
- Consideration (required)
- Sales Price (required)
- Percentage of Real Property (required)
- Form IT-2663 Required (required)
- Exemption/Tax Credits (required)
- Form TP-584 (required)
- Form RP-5217 (required)
- Cross Reference (optional)
- Document Page Count (required)
- Record & Return Information (required)

**Mortgage (MTG):** A mortgage is a written instrument which creates a lien on real property as security for the payment of a debt.

- First Party/Mortgagor/Borrower (required)
- Second Party/Mortgagee/Lender (required)
- Property (required)
- Taxable Mortgage Amount (required)
- Mortgage Date (required)
- Dwelling Type (required)
- Mortgage Tax Exemption Affidavit (optional)
- Affidavit Page Count (required if affidavit)
- Cross Reference (optional)

Document Page Count (required)  
Record & Return Information (required)

**Mortgage Agreement (MAG):** A mortgage agreement refers to a mortgage, such as a subordination or assumption agreement, but does not trigger the imposition of mortgage tax.

First Party/1<sup>st</sup> Mortgagee/Lender (required)  
Second Party/2<sup>nd</sup> Mortgagee/Lender (required)  
Property (required)  
Cross Reference (required)  
Document Page Count (required)  
Record & Return Information (required)

**Mortgage Tax Payment Only (MTP):** This document type should be chosen in very limited circumstances such as when mortgage tax only is being paid because the underlying document triggering the imposition of mortgage tax is not recordable.

First Party/Mortgagor/Borrower (required)  
Second Party/Mortgagee/Lender (required)  
Property (required)  
Taxable Mortgage Amount (required)  
Mortgage Date (required)  
Dwelling Type (required)  
Mortgage Tax Exemption Affidavit (optional)  
Affidavit Page Count (required if affidavit)  
Cross Reference (optional)  
Document Page Count (required)  
Record & Return Information (required)

**Negative Pledge Agreement (NPL):** A negative pledge is an agreement, covenant or promise made by a borrower of funds that the borrower will not sell, transfer, convey or otherwise encumber all, or a portion of, the borrower's real property.

First Party (required)  
Second Party (required)  
Property (optional)  
Cross Reference (optional)  
Document Page Count (required)  
Record & Return Information (required)

**Notice of Appropriation (NOA):** A document filed by the State of New York to set aside property for public use.

First Party/Grantor/Transferor/Seller (required)  
Second Party/Grantee/Transferee/Buyer (required)  
Property (required)  
Date of Conveyance (required)  
Document Date (required)  
Lien Deduction (required)  
Consideration (required)  
Sales Price (required)  
Percentage of Real Property (required)  
Form IT-2663 Required (required)  
Exemption/Tax Credits (required)  
Form TP-584 (required)  
Cross Reference (optional)  
Document Page Count (required)  
Record & Return Information (required)

**Order (ODR):** An official proclamation by a judge, or panel of judges, that defines the legal relationships between the parties before the court and requires or authorizes the carrying out steps by one or more of the parties. An order presented for recording must be certified.

First Party (required)  
Cross Reference (optional)  
Document Page Count (required)  
Record & Return Information (required)

**Power of Attorney (PAT):** A legal instrument used to delegate legal authority to another.

- First Party/Appointor (required)
- Second Party/Appointee (required)
- Document Page Count (required)
- Record & Return Information (required)

**Registered Agreement (RAG):** An agreement which refers to a mortgage, such as a consolidation, extension, modification or spreader agreement, and which will trigger the imposition of tax.

- First Party/Mortgagor (required)
- Second Party/Mortgagee (required)
- Property (required)
- Taxable Mortgage Amount (required)
- Mortgage Date (required)
- Dwelling Type (required)
- Mortgage Tax Exemption Affidavit (required)
- Affidavit Page Count (required)
- Cross Reference (required)
- Document Page Count (required)
- Record & Return Information (required)

**Release of Lien of Estate Tax by New York State (ROT):** A New York State Release of Lien of Estate Tax (ET-117) indicates that there is no state tax lien on the real property of a decedent. It must be obtained from the New York State Department of Taxation and Finance and must contain a raised seal and proper signature.

- First Party/Decedent (required)
- Second Party/Taxing Authority (required)
- Property (required)
- Document Page Count (required)
- Record & Return Information (required)

**Partial Release of Mortgaged Premises (RLS):** A document which releases a lien against a mortgaged premises.

- First Party/Mortgagee/Lender (required)
- Second Party/Mortgagor/Borrower (required)
- Property (required)
- Cross Reference (required)
- Document Page Count (required)
- Record & Return Information (required)

**Revocation of Power of Attorney (RPA):** A legal instrument used to terminate the authority granted in a recorded Power of Attorney.

- First Party/Appointor (required)
- Second Party/Appointee (required)
- Cross Reference (required)
- Document Page Count (required)
- Record & Return Information (required)

**Satisfaction of Mortgage (STM):** A satisfaction or discharge of mortgage is a document releasing a mortgage lien and indicating that the mortgage amount has been paid in full.

- First Party/Original Mortgagor (required)
- Second Party/Original Mortgagee (required)
- Cross Reference (required)
- Satisfaction References (required)
- Document Page Count (required)
- Record & Return Information (required)

**Sheriff's Deed (SFD):** A deed in which the Westchester County Sheriff acts on behalf of the grantor.

- First Party/Grantor/Transferor/Seller (required)
- Second Party/Grantee/Transferee/Buyer (required)

Property (required)  
Date of Conveyance (required)  
Document Date (required)  
Lien Deduction (required)  
Consideration (required)  
Sales Price (required)  
Percentage of Real Property (required)  
Form IT-2663 Required (required)  
Exemption/Tax Credits (required)  
Form TP-584 (required)  
Form RP-5217 (required)  
Cross Reference (optional)  
Document Page Count (required)  
Record & Return Information (required)

**Statement Identifying Property (SIR):** This document should be chosen when recording a Statement Identifying Real Property pursuant to Mental Hygiene Law (Article 81).

First Party/Grantor (required)  
Second Party/Grantee (required)  
Property (optional)  
Cross Reference (optional)  
Document Page Count (required)  
Record & Return Information (required)

**Waiver (WAV):** A waiver is a legal agreement waiving a claim, right or privilege with respect to real property.

First Party (required)  
Property (optional)  
Cross Reference (optional)  
Document Page Count (required)  
Record & Return Information (required)

**Will (WLL):** A Last Will & Testament which has been certified by the Surrogate's Court and contains a specific reference to real property within Westchester County.

First Party/Testator (required)

Document Page Count (required)

Record & Return Information (required)