

2025901000—Recorder-Equipment/Automation

General Government

Steve J. Bestolarides, Assessor-Recorder-County Clerk

Special Revenue Fund	2017-2018 Actual	2018-2019 Adjusted	2019-2020 Requested	2019-2020 Recommended	Increase/ (Decrease)
Expenditures					
Services & Supplies	\$271,235	\$1,296,300	\$1,108,800	\$1,108,800	(\$187,500)
Fixed Assets	0	112,000	0	0	(112,000)
Operating Transfers Out	439,068	854,000	1,208,500	1,208,500	354,500
Total Appropriations	\$710,303	\$2,262,300	\$2,317,300	\$2,317,300	\$55,000
Earned Revenues By Source					
Interest/Rents	\$63,939	\$20,000	\$75,000	\$75,000	\$55,000
Charges For Services	906,028	980,000	980,000	980,000	0
Operating Transfers In	185,919	1,262,300	1,262,300	1,262,300	0
Total Revenues	\$1,155,886	\$2,262,300	\$2,317,300	\$2,317,300	\$55,000
Net County Cost	(\$445,583)	\$0	\$0	\$0	\$0

Purpose

The Recorder's Modernization Fund is established by Government Code Section 27361(c) and can be used "solely to support, maintain, improve, and provide for the full operation for modernized creation, retention, and retrieval of information in each county's system of recorded documents."

This budget centralizes special purpose revenues and expenditures for the ongoing support, maintenance, and improvement of the Recorder's micrographics and data automation.

Major Budget Changes

Services & Supplies

- \$12,500 Increase in professional services.
- (\$200,000) Decrease in professional and special services reflecting indexing project completion.

Operating Transfers Out

- \$354,500 Increase in transfers to Assessor-Recorder-County Clerk budget for automation projects.

Revenues

- \$55,000 Increase in interest income.

Program Discussion

The 2019-2020 recommended Recorder-Equipment Automation/Modernization budget totals \$2,317,300, which is an increase of \$55,000 from the 2018-2019 adjusted budget. The increase is primarily due to the replacement server system supporting the Eagle Recorders System, design and implementation of a new website, and grantor/grantee indexing project costs. The digitization of historical documents and maps continues to be of great importance to the Department. Their preservation is necessary, as they are currently held in original form and their safety may be at risk.

As of March 31, 2019, the Recorder's Modernization Fund (#20037) balance was \$5,998,544. Annual revenue averages \$750,000, and an additional \$854,000 is anticipated to be expensed by June 30, 2019. The 2019-2020 budget includes a transfer of \$1,208,500 from the Fund to the Assessor-Recorder-County Clerk budget to support maintenance and management of equipment/automation efforts. This represents an increase of \$354,500 from 2018-2019.

In 2019-2020, the Recorder-County Clerk intends to:

- **Develop Desktop Procedures** – Similar to the desktop procedures developed for Assessor-Recorder-County Clerk Megabyte users, desktop procedures will be

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developed for all Recorder functions to assist with new employee training and cross-training of existing staff.

- **Design & Develop an Updated Website** – The Department will redesign the Assessor-Recorder-County Clerk’s website by focusing on a web strategy with the primary goal of improving the customer experience, “on-line versus in-line.” The intent is to improve public access to a variety of information currently provided by staff. This may include video instructions, live-chat with employees, enhanced business filings, and easier access to essential forms.
- **Index Grantor/Grantee Names for Historical Documents** – Indexing grantor/grantee names provides an index for historical documents recorded into the Eagle Recorder System in 2017. The project involves over 500,000 documents. Estimated completion date is September 2019.
- **Digitize & Index Historical Books (Date of Recording, Instrument/Document Number, Book & Page, Grantor/Grantee) & Historical Maps (Years: 1800 to 2000)** – These projects will improve customer service, enable quicker searching capabilities and enhance operations. Information will be stored electronically in the event of a disaster, while preserving the quality of the original documents.
- **Continue Recording Documents Electronically** – The electronic deed recording system is fully functional. All local title companies that record documents in San Joaquin County are processing them using the CeRTNA system. There are approximately 800 submitters that use nine authorized agents to submit their documents electronically, which includes the Treasurer-Tax Collector’s Office. The Recorder’s Office currently records approximately 58% of the daily documents electronically, an increase of 4% over last year. Project development and ongoing support costs are funded by a recording surcharge designated for electronic recording systems. As of March 31, 2019, the Electronic Recording Delivery System Fund (#10227) balance was \$529,142. Annual revenue averages \$140,000, and an additional \$153,600 is anticipated to be expensed by June 30, 2019. The recommended Assessor-Recorder-County Clerk budget includes \$53,800 from the fund primarily for ongoing maintenance and licensing fees.
- **Vital Records** – Vital records projects and upgrades are funded by vital record copying fees. As of March 31, 2019, the Recorder’s Vital and Health Statistics Fund (#12020) balance was \$302,014. Annual revenue averages \$60,000, and no additional funds are anticipated to be expensed by June 30, 2019. The recommended budget includes a \$60,000 transfer to Public Health Services to maintain and update its vital records database.