



TitleFlex
by Data Trace

USING THE TITLE CHAIN AND LIEN REPORT

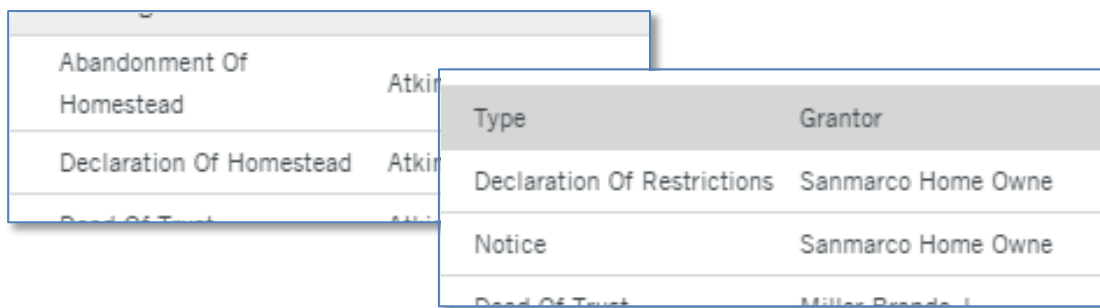
Rev. 201704

Overview

This Guide will cover how to use the Title Chain and Lien report. This report takes advantage of the historical depth of First American Title Plants to provide users with additional research ability for hard-to-find documents.

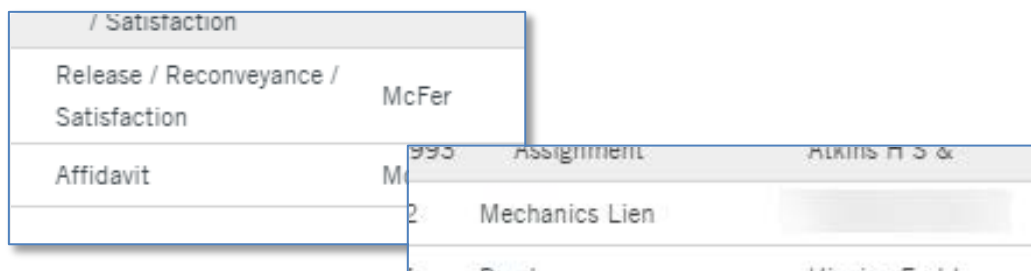
This report is unique among the reports in that its data source is from First American Title Plants. Consequently, while the historical depth of data will be exceptionally deep, you should also keep in mind the geo-coverage involved. To determine if the Title Chain and Lien Report is available in a given county, go to the Help menu in DataTree and click Geo-Coverage. Select the state and county to view which reports are available in that county.

The Title Chain and Lien Report will include deeds, mortgages, liens, releases, HOA notices, affidavits, Mechanic's Liens, and other Notices.



The image shows a screenshot of a document list table. A pop-up window is overlaid on the table, displaying a filtered view of the data. The table has two columns: 'Type' and 'Grantor'.

Type	Grantor
Declaration Of Restrictions	Sanmarco Home Owne
Notice	Sanmarco Home Owne
Deed Of Trust	Miller Brands I



The image shows a screenshot of a document list table. A pop-up window is overlaid on the table, displaying a filtered view of the data. The table has two columns: 'Type' and 'Grantor'.

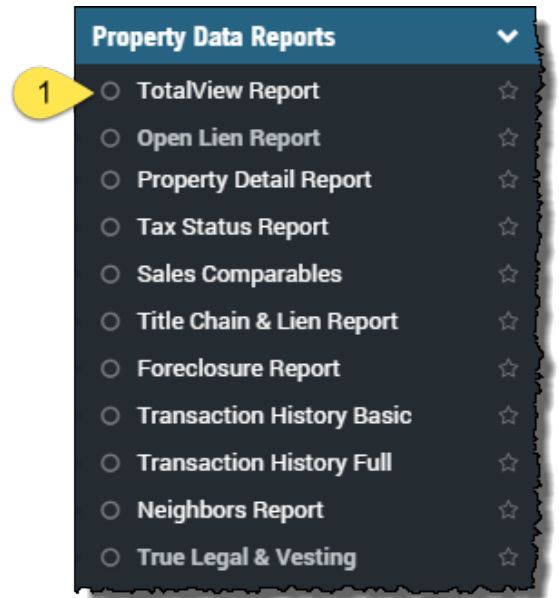
Type	Grantor
Release / Reconveyance / Satisfaction	McFer
Affidavit	M
Mechanics Lien	ATKINS H S &

NOTE: When using this report, please remember that this is an uninsured title chain.

Ordering the Title Chain and Lien Report

The Title Chain and Lien Report is part of the Property Reports section in Available Reports (1).

If the report is unavailable for that county, the report will display a red exclamation point instead of the open circle.



When ordered, this report will ask for additional information to help locate liens on the owner or property. (1) Note that there are three Name Match options.

The dialog box will display the starting date (2) for the plant search (the historical depth).

You can modify the (3) First and Second party names, if required.

A screenshot of a dialog box titled "ADDITIONAL REPORT OPTIONS". The dialog contains a section for "ADDITIONAL REPORT CRITERIA" with the following fields and callouts:

- NAME MATCH**: A dropdown menu with "EXACT" selected. Callout "1" points to this field.
- START DATE FOR (CONTRA COSTA, CA)**: A text input field containing "12/02/1974". Callout "2" points to this field.
- FIRST PARTY**: A section with three input fields: "FIRST NAME" (containing "BRENDA"), "MIDDLE NAME" (containing "MILLER"), and "LAST NAME" (containing "MILLER"). Callout "3" points to the "FIRST NAME" field.
- SECOND PARTY**: A section with three empty input fields: "FIRST NAME", "MIDDLE NAME", and "LAST NAME". Callout "3" points to the "FIRST NAME" field.
- SEARCH DATES**: A section with two input fields: "FROM" (containing "12/02/1974") and "TO" (containing "04/20/2016").

At the bottom of the dialog, there is a blue bar with the text: "NOTE: Please be aware that the Title Chain and Lien Report may take a longer time to process." Below this bar are two buttons: "CANCEL" and "ORDER".

Name Match Information:

Search results are phonetically based matches. Exact is the default match setting.

There are three settings available:

- Exact: 99% match
- Standard: 75% match
- Broad: 50% match

Search results will vary by county. After running the report, you can modify the match criteria by clicking the Change Criteria button on the report header.

Report Layout

The report contains two sections: The Title Chain and the Liens, Judgments and Bankruptcies sections.

Title Chain:

The top half of the report includes the title chain. Documents are displayed in date descending order.

Title Chain & Lien Report							Save	Print	Email	Notes	Links	Actions
1308-Carya DE Eps, Redinas, Walnut Creek, CA 94594							APN: 140-361-042-9					
Search Start Date: 12/02/1974 Start Date: 12/02/1974							CHANGE CRITERIA					
Search End Date: 03/13/2017 End Date: 03/13/2017							County Data as of: 03/01/17					
<input type="checkbox"/>	Date	Type	Grantor	Grantee	Document #	Doc Ref.						
<input type="checkbox"/>	07/11/2013	Declaration Of Restrictions	Sanmarco Home Owne		2013.174528							
<input type="checkbox"/>	02/02/2012	Notice	Sanmarco Home Owne		2012.24788							
<input type="checkbox"/>	08/09/2007	Deed Of Trust	Miller Brenden	World Savings Bank	2007.229655	303424						
<input type="checkbox"/>	^ 10/30/2007	Modification, Agreement	Miller Brenden	World Savings Bank	2007.303424							
<input type="checkbox"/>	03/27/2007	Deed Of Trust	Miller Brenden	World Savings Bank	2007.88239							
<input type="checkbox"/>	08/18/2004	Declaration Of Restrictions	Sanmarco Home Owne		2004.320091							
<input type="checkbox"/>	10/01/2001	Deed Of Trust	Miller Brenden	Citifinancial Serv	2001.294499	120089						
<input type="checkbox"/>	^ 04/24/2007	Reconveyance			2007.120090							
<input type="checkbox"/>	^ 04/24/2007	Substitution Of Trustee			2007.120089							
<input type="checkbox"/>	04/19/2001	Declaration Of Restrictions	Sanmarco Home Owne		2001.99165							
<input type="checkbox"/>	07/24/2000	Deed Of Trust	Miller Brenden	World Savings Bank	2000.154906	109147						
<input type="checkbox"/>	^ 04/13/2007	Reconveyance			2007.109147							

Order documents from the report by selecting the checkbox next to the desired document and clicking the Order button.

<input type="checkbox"/>	^ 10/01/1985	Assignment			1985.141709
<input type="checkbox"/>	07/10/1985	Deed	Bank America	View Document	1985.89690
<input type="checkbox"/>	02/23/1982	Deed	View Document	Bank America Natl	1982.19307
<input type="button" value="ORDER"/>					

You may notice that some of the documents are highlighted in gray and indented, as shown here.

<input type="checkbox"/>	02/02/2012	Notice	Sanmarco Home Owne		2012.24788
<input type="checkbox"/>	08/09/2007	Deed Of Trust	View Document	World Savings Bank	2007.229655 303424
<input checked="" type="checkbox"/>	^ 10/30/2007	Modification, Agreement	View Document	World Savings Bank	2007.303424
<input type="checkbox"/>	03/27/2007	Deed Of Trust	View Document	World Savings Bank	2007.88239
<input type="checkbox"/>	08/18/2004	Declaration Of Restrictions	Sanmarco Home Owne		2004.320091
<input type="checkbox"/>	10/01/2001	Deed Of Trust	View Document	Citifinancial Serv	2001.294499 120089
<input type="checkbox"/>	^ 04/24/2007	Reconveyance			2007.120090
<input type="checkbox"/>	^ 04/24/2007	Substitution Of Trustee			2007.120089
<input type="checkbox"/>	04/18/2001	Declaration Of Restrictions	Sanmarco Home Owne		2001.99165

The indented documents (which also include a ^) modify the document above them. As an example, the Modification Agreement (1) shown above, modifies the Deed of Trust direction above it.

Likewise, the Reconveyance and Substitution of Trustee (2) modify the Deed of Trust directly above them.

Liens, Filings, and Judgments

The lower half of the report includes other documents that might apply to the owner or property. Order documents by selecting the checkbox next to the desired document and clicking the Order button at the end of the section.

Liens, Filings & Judgments					
1800 Colts DE, 166 Vectors, Walnut Creek, CA 94598					
Search Start Date:	12/02/1974	Name(s) Searched:	Miller, Brenda, Miller Trust		
Search End Date:	04/20/2016	Match:	Exact		
<input type="checkbox"/>	Date	Type	Subject Name	Document #	Doc Ref.
<input type="checkbox"/>	09/17/2015	Certificate	Miller Trust	2015.193270	
<input type="checkbox"/>	08/12/2015	Certificate	Miller Trust	2015.167838	
<input type="checkbox"/>	06/01/2015	Declaration	Miller Trust	2015.110351	
<input type="checkbox"/>	04/22/2015	Certificate	Miller Trust	2015.76761	
<input type="checkbox"/>	04/16/2015	Certificate	Miller Trust	2015.72207	
<input type="checkbox"/>					

The sort order is date descending.

As with the Title Chain section at the top, indented documents modify the document directly above them.

<input type="checkbox"/>	10/08/2004	Declaration	Miller Trust	2004.388784	
<input type="checkbox"/>	09/17/2004	Deed Of Trust	Miller Trust	2004.360166	230923
<input type="checkbox"/>	^ 09/30/2009	Assignment	Miller Trust	2009.230923	
<input type="checkbox"/>	09/17/2004	Deed Of Trust	Miller Trust	2004.360167	
<input type="checkbox"/>	01/13/2004	Reconveyance	Miller Trust	2004.12735	
<input type="checkbox"/>	12/02/2003	Certificate Of Delinquency Of Personal Property Tax	Miller Trust	2003.584810	120558
<input type="checkbox"/>	^ 04/07/2004	Release	Miller Trust	2004.120558	
<input type="checkbox"/>	11/13/2002	Certificate Of Delinquency Of Personal Property Tax	Miller Trust	2002.426034	120557
<input type="checkbox"/>	^ 04/07/2004	Release	Miller Trust	2004.120557	
<input type="checkbox"/>	09/10/2002	Certificate	Miller Trust	2002.319326	