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Introduction: What is Release LINK?

ReleaseLINK is a component of ntcLINK (Nationwide Title Clearing’s suite of online services) and is designed to simplify and enhance NTC’s lien release processing and management service for our clients.

You will access ReleaseLINK through ntcLINK via the Secure Client Access portal on the NTC website. You can find this at: www.nwtc.com and select the “Client Login” button and this will take you to: www.nwtc.com/portal. Once logged in, you will be able to enter loans (partially or fully) that are not yet downloaded to NTC’s system, and to clear exceptions that have been identified by NTC.

There is no software to download or complicated training procedures because ReleaseLINK is a simple self-service web feature with context-sensitive help that requires no updates or downloads.

While the system was designed for the convenience of our clients, it will never replace the live assistance of our Client Relations personnel. NTC is committed to your satisfaction and to providing impeccable service. We are always here to help.

There are three key functions of ReleaseLINK: 1) Data Entry/Order Entry, 2) Exception Handling and 3) Quality Control. This user manual is separated into these parts.

Part 1: Partial Order Entry & Full Order Entry: ReleaseLINK Partial Order Entry enables you to Partial Order Entry by entering only the basic information that would ordinarily be included in an initial download. NTC can then complete the data entry and release process from files or images provided. This sophisticated data entry system is designed to remove guesswork and difficulty from the process and includes online help content every step of the way.

ReleaseLINK contains a Full Order Entry option with fields and built-in prompts to enter all information necessary to prepare a recordable release that complies with the county and state requirements of its particular jurisdiction.

Part 2: Exception Handling: ReleaseLINK includes an Exception Handling Queue where you can access loans that have been found to be exceptions (missing needed data) either through NTC’s release processing or your own review. Any exception shows up right away on ReleaseLINK, as the missing information fields are clearly visible. To resolve exceptions, you simply provide the missing information on the screens provide or request NTC to obtain it for you through ReleaseLINK.

Part 3: Quality Control: This is an optional feature that allows a trusted individual at your shop with full access to QC the work of users with Restricted Data Entry Access. This is feature is unnecessary if all your users have Unrestricted Data Entry Access rights.
Release Entry Options Overview

- **Partial Order Entry**

  Partial Order Entry is used to submit release orders to NTC to finish data entry and processing. Enter only the basic information that would ordinarily be included in an initial download.

  This feature allows you to skip the routine download process through NTC’s IT Department and instead immediately submit the order right away. When entering in this feature, only the minimum fields are highlighted as required. When you submit to NTC, we complete the rest of the data entry and release process from the files or images you provide, where these are available. This is also a very convenient option for files you already know are missing information (such as the mortgage/deed of trust).
• **Full Order Entry**

Full Order Entry option includes fields and built-in prompts to enter all information necessary to prepare a recordable release that complies with the county and state requirements of its particular jurisdiction. Used to submit fully entered orders for NTC to print and record.

This allows you to input all the required data for a loan that is not already in the NTC system so the release can be printed without further data entry by NTC. The screen highlights all required fields according to state and country requirements. The ReleaseLINK system will reject and warn you of loan numbers that are already in the system under that account to avoid duplicates. NTC will take care of all remaining lien release steps including printing, signing, recording, and tracking. Although NTC provides warranty for its forms and services provided, NTC cannot assume liability for incorrect information provided by clients via ReleaseLINK using this option.

• **Release Exception Queue**

The Exception Queue is where you can access loans that have been found to be exceptions (missing needed data) either through NTC’s release processing or your own review. Any exception shows up right away on ReleaseLINK, as the missing information fields are clearly visible. To resolve exceptions, you simply provide the missing information on the screens provided or request NTC to obtain it for you.

Orders will automatically appear in your Release Exception Queue each time NTC identifies a loan with a particular exception type and more data is needed in order to prepare the release. The outstanding exceptions are listed clearly on the front page of the Exception Queue with loan numbers and exception types. There are unique page views and submission options back to NTC according to each unique type of exception and what is missing.

**Quality Control Options Overview**

The Quality Control feature is an *optional* feature to perform a quality control check on information entered by users with Restricted Data Entry Access. This feature allows you to perform a separate QC step on all work performed by those specific users prior to submitting final work to NTC. Users with Quality Control access will be able to review the data entered and authorize ordering research for exceptions on all work submitted by users with Restricted Data Entry access.

• **QC of Partial Order Entry**

Orders that have been entered through *Partial Order Entry* by Restricted Data Entry users go to this queue for approval. Orders in this queue need authorization to send to NTC for printing and recording and possibly research depending on the loan.
• **QC of Full Order Entry**

Orders that have been fully entered by Restricted Data Entry users go to this queue for OK to print and record, or for OK to order research from NTC to complete all required fields. Orders in this queue and need authorization to send to NTC for printing and recording and possibly research depending on the loan.

• **QC of Exception Processing**

Authorize now-completed exception files submitted by Restricted Data Entry users to be sent to record at NTC, or authorize research by NTC for exception files that could not be completed internally. Users with Restricted Data Entry access have completed these files either by having all missing information entered or NTC research has been selected. Files in this queue are awaiting authorization to officially submit to NTC to perform the research or submit as OK to print and record the release.

The Quality Control feature is unnecessary if all users have Unrestricted Data Entry access.

NOTE: Users with Restricted Data Entry permission level will not have the authority to order research from NTC or officially submit any orders through ReleaseLINK.

**User Access Levels**

All ReleaseLINK log-ins, passwords and access rights for individual users are created and managed by a designated administrator at your shop (or with the help of your NTC Account Manager). This enables your key managers to administer all processes and restrict employee access or outside service companies that only need limited access. The User Management functions in ntcLINK provide flexible management of these very important information security and data integrity safeguards.

When a user is created or managed by the User Manager at your shop, they can assign specific rights to perform different functions within ReleaseLINK. This allows you to grant access to individuals based on the authority you want to give them.

These are the user rights that are assigned to each individual user of the system:

1. **Restricted Data Entry** (Required to submit entered orders to QC Queue)
2. **Unrestricted Data Entry** (Unrestricted access to enter & submit orders to NTC)
3. **Quality Control Only** (Review & submit orders to NTC from QC Queue)
4. **Full Access Data Entry & Quality Control** (Unrestricted access to enter, QC & submit orders to NTC)
IMPORTANT NOTE: The Quality Control feature is optional. Granting all users *Unrestricted Data Entry Access* will completely avoid the need for the Quality Control Feature. If you need assistance granting user permissions, please contact your Account Manager.

**Menu Screens**

As described above, depending on the access granted to each user the main entry screens appear different according to the type of user. The following samples explain each type in more detail.

In addition to different menu screens, a clear difference in all User Access levels appears on the final screens when orders are being saved and submitted to NTC. Each user level will see different options depending on the level of access granted. Throughout this manual samples of these differences will be shown.

**Type 1: Restricted Data Entry** (User is required to submit entered orders to QC Queue). This user can perform data entry features but cannot officially submit final work to NTC. All menu options to submit orders to NTC are replaced with options to submit to QC queue instead. A separate user with QC permission must review their work before it is officially submitted to NTC.

This is a sample of the menu for this user type.
Type 2: Unrestricted Data Entry (User has unrestricted access to enter and submit orders directly to NTC). This user has full access to perform data entry and submit orders directly to NTC without a QC check. This user does not have access the QC queue to review orders entered by other users.

Type 3: Quality Control Only (User can review and submit orders to NTC from QC Queue). This user has permission rights to view orders entered by users with Restricted Data Entry permission and officially submit work to NTC. This user has access to the Quality Control queue only and cannot enter additional or new orders.
**Type 4: Full Access Data Entry & Quality Control** (User has unrestricted access to enter, QC and submit orders to NTC). This user has full access to perform unrestricted data entry and submit orders directly to NTC without a QC check. This user can also access the QC queue to view orders entered by users with Restricted Data Entry permission and officially submit work to NTC.

This is a sample of the menu for this user type:

![Menu for Type 4 user type](image)

**Import Orders**

ReleaseLINK has the ability for users to import an Excel spreadsheet data file to submit new orders into ReleaseLINK. Select the Import Orders icon from the ReleaseLINK main menu screen.

![Import Orders icon](image)

A new window will open with an option for you to select the type of service you need for the files you are importing. When you import a file into ReleaseLINK you are not submitting officially to NTC yet, you are placing those orders either in the Full Entry queue or the Partial Order Entry queue within ReleaseLINK according to the option you want.
Select if you are uploading the spreadsheet for Full Order Entry or Partial Order Entry.

Click the **Helpful Information for Using this Feature Button** to expand the view for additional instructions and help. Clicking the button a second time will return it to the normal view.
The columns of the Excel spreadsheet must be formatted in a particular order for it to import correctly. There are also minimum field requirements.

Click the hyperlink that says: **2. Download and save the template onto your computer.** This will open an Excel spreadsheet template. Save this to your computer for future use.

For successful imports, you must ensure that all fields are populated and in the same order as the template provided.

Then back in ReleaseLINK, after you select the appropriate file type, **Browse** for the file you want and then click the **Import** button. Orders submitted this way will automatically appear in ReleaseLINK in the appropriate entry queue you selected.
If the Import process is successful, you will get a confirmation that a certain number of records have been successfully imported into ReleaseLINK.

The system will import the files in the order they are listed on the spreadsheet. If there was an improperly formatted field or an empty mandatory field an error will display on your screen indicating the problem and which loan. The system will import all other loans that were in an acceptable format. The system will not import duplicate loans based on loan number match. If you attempt to upload a loan that is already in the system it will display an error and skip that loan.

Unlock Loan

When a loan is mid-entry in the ReleaseLINK system it is automatically locked from being edited inadvertently by another user. It can happen that a loan freezes in this locked state. You now have the ability to unlock a loan in this state in a special queue.

To unlock a loan select the Unlock Loan icon from the main menu. Only users with Unrestricted Access will have this option appear on their screen.
A new window will open displaying all the loans that are currently locked within the system. You can search the loan number to find it. The icon on the left indicates whether it is locked. To unlock the loan click the word “Unlock” on the right of the loan you wish to unlock.

About the Entry Queues (Partial Order Entry or Full Order Entry)

When you select either Partial Order Entry or Full Order Entry, you will first see the screen below. You may elect to either Enter New Order or select Edit to open an order that was previously imported into ReleaseLINK or entered earlier.
As long as a loan is in the ReleaseLINK system, it cannot be modified in NTC’s lien release system, which is a separate database. When you place an order or OK a release to print, that loan leaves ReleaseLINK and is submitted to the NTC system. Any changes made to the loan while it is “with NTC” are entirely the responsibility of NTC personnel.

The list of loans that appears here are all loans that are currently in progress and have not been officially submitted to NTC. Once officially submitted to NTC, they will no longer be found in any ReleaseLINK queue.

You can search this list by loan number or status or filter the loan list by any of the headings.

- **Entry Queue Columns:**

  **Status** - The status in the order entry list will be one of the following two:

  **Entry in Progress**: This is an order you or another user started and have not yet submitted to NTC. By clicking *Edit* you can resume your work.

  **Order QC Fail**: This is a Quality Control status indicating an order that was entered into ReleaseLINK by a user with Restricted Data Entry failed the quality control check. Only one of your users with Full Access or QC permission can assign this status, this is not an NTC status or review. When *Edit* is clicked, the order entry screen will open and the reason for failure will appear near the top.

  **Status Date**: You can easily see the date of the last status to track progress within the ReleaseLINK system.

  **Input By** - This shows the username of the individual that input the order into ReleaseLINK. It
easily distinguishes between your staff and NTC entered loans.

**OOC Date:** You can easily see the date the file will go Out of Compliance (“OOC”) to state and county laws. Clicking this field name will sort the list by compliance date so that you can easily work according to priority.

**Delete:** You can delete a loan from any queue by selecting the delete button. A warning message will appear confirming you want to delete the loan before it is deleted.

**Search Tool:** You can search by loan number by typing the loan number in the box and clicking the *Search* button. You can also filter the list by status you have to choices, *Order Entered* or *Order Failed*. Order Entered means it has been partly entered, awaiting completion. Order Failed means it has been returned by the QC person to have inputting errors fixed. After searching for a specific loan, this field can be reset by deleting the loan number in the field and clicking search again, the full loan queue will reappear. Or, if you wish to search for another loan, just enter the new loan number and click search again.

- **Export to Excel:**

You can export the list of loans in this queue by clicking the Export to Excel button. It will open up an excel spreadsheet with the list of loans in that particular queue.

- **Loan Count:**

The total number of loans in the queue is clearly listed under the Export to Excel button on the upper right side of the screen.

**Entering New Orders**

After selecting *Enter New Order* or to *Edit* an order previously started, you will be brought to the order placement screens. The required fields for that type of order will be highlighted in orange. Only minimal fields are needed for *Partial Order Entry* and additional fields are needed for *Full Order Entry*. These screens look the same only the highlighted required fields will change.
A single red asterisk (*) shows the minimum amount of information ReleaseLINK needs in order for you to be able to save a loan in the system (such as if you need to save and return later to finish). Double red asterisks (**) indicated when a required field has been missed.

Navigation is done with the “Tab” key or by mouse clicks (you may experience unexpected results when using the “Enter” key).

Partial Order Entry

Easily Enter Minimal Fields to Place Your Order

Partial Order Entry is used to submit release orders to NTC to finish data entry and processing. Enter only the basic information that would ordinarily be included in an initial download.

This feature allows you to skip the routine download process through NTC’s IT Department and instead immediately submit the order right away. When you submit to NTC, we complete the rest of the data entry and release process from the files or images you provide, where these are
NOTE: All detailed instructions on order entry are listed under the Full Entry Order section of this manual.

Remaining Information Needed to Complete the Order

Since this is Partial Order Entry, NTC will need to be supplied with all additional information to complete the data entry and prepare the release. You have two options on what you can supply to NTC.

First Option: Send NTC the File or Image to Complete the Order

You may opt to enter only the minimal fields required to place an order and have NTC complete the data entry process. In this case you must concurrently provide NTC with a file or image to complete the data entry. You can upload an image within ReleaseLINK, (see the Full Order Entry section for details) or follow the existing procedures for your account for mailing files to NTC.
Second Option: Order with Authorization for NTC to Research

Enter all the information you have available, but if you are missing mandatory fields you can instruct NTC to research the county records to locate missing information. Click the **Order NTC Research** button shown here:

![Order NTC Research button](image)

When selected it changes to **NTC Research Authorized** as shown here:

![NTC Research Authorized](image)

To deselect research, click the button again and it will return to the original setting.

This is a very convenient option for files where you are already aware that you are missing the mortgage/deed of trust, assignment or other key information. You can easily enter the limited information you have and instruct NTC to research and complete the release process immediately. With this option, a file or image is not required, but you are encouraged to send what you have.

**Partial Order Entry: Submitting Your Final Work**

When you have finished with entry of at least the minimum required fields, click the **DONE** button.

A new screen will appear with your options. The options will vary depending on whether the user has Unrestricted Data Entry Access or Restricted Data Entry Access.
Users with Unrestricted Data Entry access will see these options:

These options are defined as follows:

- **Order Research from NTC** is an option that will be available only if the Order NTC Research button had been selected and changed to NTC Research Authorized on the Order Entry screen.

- **Place the order with NTC** will officially submit the order to NTC to process the release as per your contract.

- **Save my work, I’ll be back to finish** will save your work in progress without moving it out of your queue. Use this if you are waiting for more information that you will input at a later date.

- **Exit without saving** will discard all changes made since the last save.

WARNING: Selecting **Back to Queue** at this point will discard all your entries and not save.

Users with Restricted Data Entry access will see these options:
These options are defined as follows:

- **Submit to QC Queue** is the option to finish your data entry and submit it for your internal Quality Control check before it is submitted to NTC.

- **Save my work, I'll be back to finish** will save what information you have entered and allow you to return to it later without submitting it for QC.

- **Exit without saving** discards all changes since the last save.

**WARNING:** Selecting **Back to Queue** at this point will discard all your entries and not save.

**Full Order Entry**

When you perform **Full Order Entry**, there are additional fields and tabs that will require data entry. Highlighted fields and alerts will prompt you for the needed information.
Order Entry Tab

The Order Entry tab is the main data entry screen. The highlighted fields are your primary guides as to what is required for a release in a selected state and recording jurisdiction. A few fields are specific to certain states or even one or more counties. Any fields that are not required by the recording jurisdiction will not be highlighted, but they will remain on the screen.

A single red asterisk (*) shows the minimum amount of information ReleaseLINK needs in order for you to be able to save a loan in the system (such as if you need to save and return later to finish). Double red asterisks (**) indicated when a required field has been missed.

The Order Entry screen has the controls to return to the queue, save your work, submit orders, upload images and assign priority while other tabs do not. When you select any of the tabs across the top, warning messages will appear if field required to save are not filled out.

Each field includes a “tool tip” 🍀 - a clickable icon to the left of the field name that opens a text box explaining why the field is there and when you should use it. These field definitions can also be found by clicking the “Help Files” button at the top of the page.

Special Requirements at a Glance

If the file you are entering is for a jurisdiction that has unusual or special requirements a hyperlink will appear at the top of the entry screen that the user can click on to open a window to view additional details.
Order with Authorization for NTC to Research

Enter all the information you have available, but if you are missing mandatory fields you can instruct NTC to research the county records to locate missing information. Click the Order NTC Research button shown here:

When selected it changes to NTC Research Authorized, as shown here:

To deselect research, click the button again and it will return to the original setting.

FAQ

The FAQ button has frequently asked questions and additional information. When you click the FAQ button a window pops open with additional information for help with fields on the screen.
Feedback

If you have special instructions or details to send NTC along with that order, you can click the Feedback button to open an email message that will be sent to your Account Manager at NTC.

The message will automatically be sent to the appropriate Account Manager and include the loan number for reference without you having to type it. Just enter your message and hit send.

Example of feedback message:
Signoff

There is a special field setup for signoffs to address how the lien release should be properly printed with the appropriate and complete legal entity name.

Clicking the field will open a box for you to select the appropriate signoff. This list is pre-filled with all the signoffs that were originally setup and specific to your account. You can use the search tool to find a lender on the list or scroll bar. To select a signoff, click the code on the left.

If the appropriate signoff is not on the dropdown, you can request it to be added by checking the **Lender of record is not listed but should be** box (only available on Full Order Entry.)
This will open a window for you to enter the signoff verbiage and send it to NTC.

You can also select whether that signoff is applicable to this particular order or for others with the same lender of record. Type the regular company name into the “Lender of Record” field as the shortcut name for that signoff. Enter the full legal signoff wording into the “Signoff Wording” field.

**Lender of Record Example:** FEDERAL NATIONAL MORTGAGE ASSOCIATION.

**Signoff Wording Example:** FEDERAL NATIONAL MORTGAGE ASSOCIATION BY YOUR BANK ITS ATTORNEY-IN-FACT
This message will be sent to the NTC Signoff Manager to setup the new lender for your account. This process will take approximately 24 hours. You may be contacted to resolve any questions. You will need to **Save** your order and return to it at a later time to finish the order once the signoff has been setup. If the signoff does not appear on the list within 24 hours please contact your account manager.

### Assign Order Priority

You can assign a priority when submitting a loan to NTC under either the Partial Order Entry or Full Order Entry features. You can assign either Standard or Rush processing. Rush orders will be completed within 24-48 hours. There is an additional $7.50 charge per order for rush requests, unless otherwise specified in your contract. Rush processing is not available on exception files.

### Special Handling Instructions

When you type a note in the **Special Handling Instructions** field during order entry you can relay key information to NTC regarding that file and provide more details when submitting rush orders or special instructions.
Client ReleaseLINK Note

When you type a note in the Client ReleaseLINK Note field it stays within the ReleaseLINK system and is not sent to NTC. This note field is for the client’s own internal use to relay information to a co-worker, Quality Control staff or for their own reference.

Upload an Image

When you enter an order under Place and Order for NTC to Process or Full Entry or Exception Queue, you have the option to upload an image that corresponds to the order.

Browse for the file on your computer and select Upload Image. Acceptable file types are either PDF or TIFF files. When it has successfully uploaded details will display on the screen. You can add additional images and delete as needed.
Entering Required Information in the Tabs

The seven tabs across the top of the form are designed to follow the sequence of paging through a mortgage. Following are descriptions of each tab and entry instructions.

Alerts in Red

In addition to the highlighted fields, you may find an alert for required fields that are not on the first page of the order entry form. A statement in red appears at the top of the page such as “Mailing Address,” “Legal Description Required” or “Assignment Chain/CEMA Required,” sometimes more than one. Note: The alert will continue to display even after you have input the data.

In the event that the alert “Assignment Chain/CEMA Required” appears and the loan was never assigned to another entity and therefore it is accurately in the name of the original beneficiary, you can ignore this requirement it will not prevent you from continuing.

Mailing Address Tab

This is a required field in certain states such as California, Kentucky and Georgia. If this field is required for the state, an alert will appear at the top of the screen. Remember to click SAVE before you go to the next screen.

If left blank, the borrower name and property address will be used as the mailing address by default.
Re-Recording Information Tab

If the mortgage has been recorded more than once, you would enter the additional recording information here. Remember to click **SAVE** before you go to the next screen.

Note: The first section of this page is read-only and displays information previously entered by NTC, if any. This area does not apply in order entry.
Legal Description Tab

This is a required field in some jurisdictions. An alert will appear on the order entry screen if this field is required. A full legal description can be entered here or if prefer, you can upload an image instead. The browse options will be grayed out until you check the See Attachment A.
box. Then Browse for and attach the appropriate file. Acceptable formats are TIFF and PDF files. Counties will reject illegible attachments, so if it’s borderline, please type in the legal description regardless of length. Click Upload Image.

When you click Upload Image it will appear on your screen along with details on the user that uploaded it and the date. You can click the Image and open to view it. This is very helpful when reviewing other users work.
Agent Information Tab

Agent information should be input only if your account was previously set up for mailing of documents to agents in selected states. If in doubt, please contact your Account Manager. Remember to click SAVE before you go to the next screen.

Assignment Chain/CEMA Tab

Some jurisdictions (including most of New York and Pennsylvania) require any assignments to be recited on releases. New York also requires the recital of CEMA’s (Consolidation, Extension and Modification Agreements). ReleaseLINK provides a detailed entry form for each document in an assignment chain or CEMA chain. This is only applicable if the loan has been assigned to another entity after origination. Click the Add button and fill in each field.
Add your data in chronological order and assign each document a sequence number. You must enter these in the precise order, as in 1, 2, 3, etc. This number is very important because if there is a numerical gap it may cause a county reject due to it appearing that there is a missing document. If you make a numbering mistake you will have to manually renumber all the documents to display the appropriate chain, so be cautious to enter them correctly.

As you enter each document in the chain click **Save** and this will return you to the Assignment Chain tab.
If you need to enter additional documents in the chain click **Add** and repeat the process until all are entered. If you need to make a change, select the assignment from the list and click **Edit** or **Delete**.

Once you have entered one or more assignments, you can select **Preview Chain** to see how the sequence will be printed.
Original Download Information Tab

This is a read-only display of information you sent NTC in the original download, if applicable. This screen will be blank for orders you are placing through ReleaseLINK, but will contain information for loans that went to your Exception Queue from NTC.

Full Order Entry: Submitting Your Final Work

When you have finished entering the various required information, return to the Order Entry screen and click the DONE button either in the upper right portion or at the bottom.
A new screen will appear with your options. The options will vary depending on whether the user has Unrestricted Data Entry Access or Restricted Data Entry Access.

**Users with Unrestricted Data Entry access will see these options:**

![Choose Action](image)

These options are defined as follows:

- **OK to Print and Record** is the option to fully submit your work to NTC to print the release and submit for recording to the county. *Note: This option will be grayed out and unavailable if there are empty required fields and “NTC Research Authorized” is not selected.*

- **Order Research from NTC** is an option that will be available only if the Order NTC Research button had been selected and changed to NTC Research Authorized on the Order Entry screen.

- **Save my work, I’ll be back to finish** will save your latest changes and leave the loan in the same queue.

- **Exit without saving** will discard your changes.

**WARNING:** Selecting **Back to Queue** at this point will discard all your entries and not save.
Users with Restricted Data Entry access will see these options:

These options are defined as follows:

- **Submit to QC Queue** is the option to finish your data entry and submit it for your own separate Quality Control check before it is submitted to NTC.

- **Save my work, I'll be back to finish** will save what information you have entered and allow you to return to it later without officially submitting it to NTC.

- **Exit without saving** will let you exit without saving and is provided in case you wish to discard your entries.

WARNING: Selecting **Back to Queue** at this point will discard all your entries and not save.

### Exception Queue

#### Exception Queue Features

Orders will appear in your **Release Exception Queue** each time NTC identifies a loan with a particular exception type and more data is needed in order to prepare the release. The Exception Queue list has the loan number, the exception type and other general data.

All orders placed by NTC into your ReleaseLINK Exception Queue are locked in the main NTC system so that NTC personnel may not change loan data while they are assigned to you. All changes are tracked so that accountability can be readily determined.

Loans appearing in this queue have been data entered by NTC. Select **Edit** to view the details. You will see an exception description just below the tabs, as shown below.

You may search for a loan by the loan number, the status or by exception type. In addition you may filter the loan list by any of the headings. You can also easily export this list to Excel.
Loans marked with a red asterisk (*) indicate that the loan has been in the exception queue previously and NTC is returning it for further exception handling.
Exception Queue Columns:

**Status** - The status in the order entry list will be one of the following two:

**Entry in Progress**: This is an order you or another user started and have not yet submitted to NTC. By clicking *Edit* you can resume your work.

**Order QC Fail**: This is a Quality Control status indicating an order that was entered into ReleaseLINK by a user with Restricted Data Entry failed the quality control check. Only one of your users with Full Access or QC permission can assign this status, this is not an NTC status or review. When *Edit* is clicked, the order entry screen will open and the reason for failure will appear near the top.

**Delete**: You can delete a loan from any queue by selecting the delete button. A warning message will appear confirming you want to delete the loan before it is deleted.

**OOC**: You can easily see the date the file will go out of compliance to state and county laws.

**Status Date**: You can easily see the date of the last status to track progress within the ReleaseLINK system.

**Exception Type**: This displays the exception for that particular loan.

**Return to NTC**: You can also return the file to NTC with a note explaining why. This is useful if you already sent a document or file in the mail to clear and exception and no further action on your part is needed, or other such circumstances.

- **Search Tool**:

You can search by loan number by typing the loan number in the box and clicking the *Search* button. You can also filter the list by status you have to choices, *Order Entered* or *Order*.
**Failed.** Order Entered means it has been partly entered, awaiting completion. Order Failed means it has been returned by the QC person to have inputting errors fixed. After searching for a specific loan or applying a filter, the queue can be reset by clicking the **Clear Filter** button. Or, if you wish to search for another loan, just enter the new loan number and click search again.

- **Export to Excel:**

You can export the list of loans in this queue by clicking the Export to Excel button. It will open up an excel spreadsheet with the list of loans in that particular queue.

- **Loan Count:**

The total number of loans in the queue is clearly listed under the Export to Excel button on the upper right side of the screen.

- **Exception Categories**

There are filters to be able to view at a glance categories of exceptions, such as: Chain of Title Exceptions, Data Discrepancy, Exceptions Requiring Research, Incomplete Initial Order or No File/No Image. This is helpful to sort and handle similarly related types of exceptions at once.

- **Exception Types**

There is an extensive list of exception types based on the specific information that is missing. Such as loans missing: Recording Info and Legal, Legal and PIN, Assignment, etc. You can sort and filter only by a specific exception type. You can also customize your account so that only
have certain types of exceptions are visible on ReleaseLINK. This is helpful if you have auto-research enabled on certain types of exceptions.

Clearing Exceptions by Type

When you select *Edit* on a loan listed in the queue it opens a unique window specific to each exception type. The window displays what is missing and gives you a tool to clear that specific type of exception as well as choices to submit that type of exception back to NTC according to that specific exception. Each type of exception can vary widely on what is needed to clear it, as well as what type of research options may be necessary to resolve it.

Exception-Specific Screens

Some types of exceptions will display a custom screen unique to clear that particular type of exception and custom submit to NTC options according to what is needed to complete the
release. This will be for exceptions such as missing assignments, un-recordable assignment found in the file, missing property address, data discrepancy between original loan download and file, no image or file, missing chain of title and more.

Examples of some of the Exception-Specific Screens:
• **Missing Assignment Exceptions**

If the lender of record doesn’t match the assignment chain or signoffs provided to NTC it will appear as a Missing Assignment Exception. If there is a break in the assignment chain this can be resolved by supplying the assignment to NTC, having NTC research it, request a missing intervening assignment service, or have NTC prepare a new assignment. You can also upload an image of the missing assignment directly to cure the exception.

However, it may also be that your company does have authority to sign and NTC simply needs the appropriate sign-off language for that lender name. To resolve this select the “*Use the following signoff block*” option.

After you select *Use the following signoff block* option, you will be presented with a new screen to select the existing signoff language originally setup for your account. You can click the field to see a list of available options.
As in Full Order Entry if the appropriate signoff is not on the dropdown, you can request it to be added by checking the **Lender of record is not listed but should be** box (only available on Full Order Entry.)

This will open a window for you to enter the signoff verbiage and send it to NTC.
You can also select whether that signoff is applicable to this particular order or for others with the same lender of record. Type the regular company name into the “Lender of Record” field as the shortcut name for that signoff. Enter the full legal signoff wording into the “Signoff Wording” field.

**Lender of Record Example:** FEDERAL NATIONAL MORTGAGE ASSOCIATION.

**Signoff Wording Example:** FEDERAL NATIONAL MORTGAGE ASSOCIATION BY YOUR BANK ITS ATTORNEY-IN-FACT

This message will be sent to the NTC Signoff Manager to setup the new lender for your account. This process will take approximately 24 hours. You may be contacted to resolve any questions. You will need to **Save** your order and return to it at a later time to finish the order once the signoff has been setup. If the signoff does not appear on the list within 24 hours please contact your account manager.

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**Exception Handling Feedback**

If you have special instructions or details to send NTC along with that exception, you can click the **Feedback** button to open an email message that will be sent to your Account Manager at NTC. The message will automatically be sent to the appropriate Account Manager and include the loan number for reference without you having to type it. Just enter your message and hit send.
Example of feedback message:

![Property Address](image)

**Clearing Exceptions Using the Order Entry Screen**

Some types of exceptions will return you to a screen that looks similar to the Order Entry Screen used for Full Entry or Place Order to NTC. This is for missing items that can be easily cleared just by entering the missing information. These types of exceptions may be items like missing Recording Information, Legal Descriptions, PIN, etc. In this case the *Exception Description* field will clearly display what information is missing. There will be one or more blank required fields corresponding to the exception type.
View Original Download Information

When clearing an exception from the Order Entry view, you can click the **Original Download Information** tab if you need to review the information NTC was originally provided about the loan.
Important Note: Restricted Access Users & Clearing Exceptions

Users that have been given Restricted Access will have limited capability to resolve exceptions. All exception-specific screens will be prevented from submitting to NTC. This is due to these exceptions requiring a final decision, incurring costs, etc, therefore Restricted Users will only be allowed to submit the exception to the QC queue. As shown below.

However, Restricted Access users can resolve certain types of exceptions that are resolved using the Order Entry Screen and submit it to the QC Queue. As shown below.
Uploading an Image to Clear an Exception

For certain exception types you now have the option of uploading an image that will handle the missing data and allow the loan to be processed by NTC.

*Browse* for the file on your computer and select *Upload Image*. Acceptable file types are either PDF or TIFF files. When it has successfully uploaded details will display on the screen. You can add additional images and delete as needed.

Then select the appropriate action, if an image has been uploaded, select the “Image Uploaded, NTC to complete entry” option.

Sending a Physical File to NTC to Clear an Exception

If you have a physical file (hard copy) that you wish to send to NTC to clear an exception, check the “Physical file being shipped to NTC” option and mail the documents to NTC. NTC will
anticipate the arrival of the needed document(s) and complete the loan processing as soon as received.

**Example of multiple options to clear an exception:**

Order NTC Research to Clear the Exception

You also have the convenient option to **Order NTC Research** to clear the exception if you cannot readily obtain the required information. This button is located at the top of the form, just above the exception description, as shown below:
Submitting Work to NTC from Exception Queue

There are different methods of submitting your work to NTC based on the unique exception. It will either be submitted from the Exception-Specific screen or the Order Entry screen.

Submitting Word from Exception-Specific Screens

Users with Restricted Access will have limited options to clear exceptions and return to NTC. They will not be permitted to submit to NTC without a QC check. They will see options such as this instead.

Users with Unrestricted Access are permitted to select the appropriate option to clear the exception and immediately submit it to NTC without a QC check by clicking **DONE**.
Submitting Your Work from Order Entry Screens

For exceptions cleared using the Order Entry screens, once you have finished reviewing the exception and providing the missing information or ordering NTC research, click **DONE**. If you only reviewed the exception and did not enter or select any option, you may return to the queue by selecting **Back to Queue**.

**IMPORTANT NOTE:** Any information or options you entered WILL NOT be saved if you select **Back to Queue** without clicking **DONE**.
After you click **DONE** a new screen will appear with your options. The options will vary depending on whether the user has Unrestricted Data Entry Access or Restricted Data Entry Access.

**Users with Unrestricted Data Entry access will see these options:**

These options are defined as follows:

- **OK to Print and Record** is the option to fully submit your work to NTC to print the release and submit for recording to the county.

- **Order Research from NTC** is an option that will be available only if the “Order with NTC Research to Clear Exception” box has been checked earlier.

- **Save my work, I’ll be back to finish** allows you to save changes and keep the loan in your queue.

- **Exit without saving** will discard your changes.

WARNING: Selecting **Back to Queue** at this point will discard all your entries and not save.
Users with Restricted Data Entry access will see these options:

- **Submit to QC Queue** is the option to finish your data entry and submit it for your own separate Quality Control check before it is submitted to NTC.
- **Save my work, I’ll be back to finish** will save what information you have entered and allow you to return to it later without officially submitting it to NTC.
- **Exit without saving** will let you exit without saving and is provided in case you wish to discard your entries.

**Quality Control**

**Quality Control of Order Entry**

The Quality Control feature allows you to perform a separate QC step on all work performed by specific users with Restricted Data Entry Access prior to submitting final work to NTC. Users with Quality Control access will be able to review the data entered and authorize ordering research for exceptions on all work submitted by users with Restricted Data Entry access.

This feature limits the rights of your Restricted Data Entry users by requiring a final pass by authorized personnel to submit final work to NTC. When users are setup with Restricted Data Entry access all the data entry they perform in ReleaseLINK must go through the QC queue before submitting to NTC.

**IMPORTANT NOTE:** This feature is OPTIONAL. Granting users *Unrestricted Data Entry Access* will completely avoid the need for this Quality Control Feature. If you need assistance granting user permissions, please contact your Account Manager.
QC of Partial Order Entry

Selecting this option will bring you to a queue of loans that had previously been entered by users with Restricted Data Entry access with the option *Partial Order Entry* and therefore entered with minimal information. Files in this queue are awaiting a review before they are officially submitted to NTC to complete the order.

If the order failed the QC, it moves from this queue back to the *Partial Order Entry* queue to be resolved. If the order passes QC, it will be submitted to NTC and leave the ReleaseLINK queue system altogether.

To proceed with the Quality Control check, select *Edit* on the loan you wish to review. This will bring you to the following screen. This is the same screen used by the data enterer. You can see at a glance that the data enterer authorized NTC research and all entries made. Click the *DONE* button when you have reviewed the information. Please refer to the *Submitting Your Work* section in this manual on how to proceed after you select *DONE*. 
QC of Full Order Entry

Selecting this option will bring you to a queue of loans that have previously been entered by users with Restricted Data Entry access with the option Full Order Entry and therefore are considered complete (or entered with the option to order research from NTC). Files in this queue are awaiting a review before they are officially submitted to NTC.

If the order failed the QC, it moves from this queue back to the Full Order Entry queue to be resolved. If the order passes QC, it will be submitted to NTC and leave the ReleaseLINK queue system altogether.
To proceed with this Quality Control check, select **Edit** on the loan you wish to review. This will bring you to the following screen. This is the same screen used by the data enterer. You can see at a glance that the data enterer authorized NTC research and all entries made.

Click the **DONE** button when you have reviewed the information. Please refer to the *Submitting Your Work* section in this manual on how to proceed after you select **DONE**.

**QC of Exception Handling**

Selecting this option will bring you to a queue of loans that have previously been marked as exceptions from the NTC data entry process and completed by users with Restricted Data Entry access. Files in this queue are awaiting approval to submit to NTC for printing or research.

If the order failed the QC, it moves from this queue back to the **Release Exception Queue** to be resolved. If the order passes QC, it will be submitted to NTC and leave the ReleaseLINK queue system altogether.

To proceed with this Quality Control check, click **Edit** on the loan you wish to review. This quality control feature allows you to view the information that has been entered into the system and verify its accuracy and completeness.
This will bring you to a screen similar to the Order Entry Tab. Here you can review the data entered and verify the exception has been handled. You can clearly see the exception listed at the top. As you will see the screen remains the same as in order entry, you are simply reviewing what was previously entered.

In this example, you can see that the exception was that the order was missing a Legal Description.
Go to the Legal Description tab to see what was previously entered.

Click the **DONE** button when finished. Please refer to the *Submitting Your Work* section in this manual on how to proceed after you select **DONE**.

**QC: Submitting Your Work**

After you have reviewed the loan from any of the three quality control options explained earlier and have clicked **DONE**, you will be presented with these “submit” options for that loan:
These options are defined as follows:

- **OK to Print and Record** is the option to fully submit your work to NTC to print the release and submit for recording to the county. *Note: This option will be grayed out and unavailable if the request is to “Order research from NTC.”*

- **Order Research from NTC** is an option that will be available only if the “Order with NTC Research to Clear Exception” box had been checked earlier.

- **Save my work, I’ll be back to finish** will save your changes and keep the loan in the QC queue.

- **Exit without saving** will discard your changes.

- **QC Fail** is the selection that will allow you to fail the quality control check if something was missed or incorrect. The loan will be sent back to the appropriate entry queue with a status of Order QC Fail with an optional Fail Reason to tell the data enterer what to correct.

**Important Note:** Release orders that are submitted as OK to Print and Record through ReleaseLINK do not go back to NTC’s Quality Control department. The printed release will be checked over for general acceptability for recording but not for the accuracy of data entered through ReleaseLINK, for which NTC assumes no liability.

**QC Fail**

When the QC finds an error in an order that they check, the QC selects QC Fail and then has the option of adding text in the Fail Reason field to explain to the original Data Enterer what needs to be done to handle the reason for QC failure.
The Data Enterer will then see the order back into the original queue (Place Order Queue, Full Entry Queue or Exception Queue) and they then have the ability to correct the issue and then re-submit the order back to the QC for re-examining and passing.

To handle the QC fail, the Data Enterer clicks **EDIT** and then at the top left of the screen, there is a field **QC Failure Reason** that contains the comments entered by the QC as to why the order was failed. This facility gives the Data Enterer a clear explanation regarding what needs to be corrected before the order is re-submitted for QC again.