

IMPORTANT NOTICE ABOUT REAL PROPERTY DOCUMENT INDEXING

**Effective July 1, 2012
(except Wake County, where by January 1, 2014)
real property instrument indexing
will be according to new minimum standards**

This brochure provides a summary
of some of the features of the new rules

For details review:

the revised Minimum Standards for
Indexing Real Property Instruments

and

the local rules of this office

(available for review upon request)

AS APPEARS:

- Under the new rules names are entered into the database as they appear on the document
- Searchers get query results for names that match the characters as entered
- Also searchers can see names that match without regard to punctuation, symbols, and spaces

NAME COMPOSITION:

Several presumptions apply to the construction of names, such as:

- Human names in a document are assumed to be in the United States name convention of given names followed by surname
- Hyphenated surname (e.g., Jones-Smith) is indexed with the combined surname as it appears, without the hyphen, and with last word alone as the surname
- Suffixes (Jr., III, etc.) are placed after the last given name in the given name field
- Estate names are indexed by the human name
- Trust names are indexed as non-human names and by human name contained within

As under the prior rules, examine *the document* to determine if it is relevant to your search

SOME OF THE FUNCTIONS:

Equivalencies: Results returned that automatically associate characters with abbreviations and vice-versa

Auto-completion: Optional drop-down menu may suggest names from the record database that begin with the entered characters

Soundex: Optional function may suggest names from the record database that may be pronounced similarly to the named entered

SORT ORDER:

When names are provided in a sorted order, the order of the list is according to:

American Standard Code for Information Interchange (ASCII) order for 68 recognized letters, numbers, symbols, and marks on the standard keyboard – other characters are not recognized

In alphabetical order, nothing comes before something:

AD VIDEO
ADAM INSTRUMENT
ADAMS BILT CO

Review the minimum standards to determine the recognized characters and their precise order

Some things drafters can do to facilitate document indexing and findability:

- Clearly indicate the names of the parties to the document and their capacities as grantor or grantee (e.g., in capitals, “grantor” or “grantee” in parentheses)
- Put all names of the parties to the document in the forefront of the document (not in the middle or in attachments)
- Clearly separate from the name to be indexed any additional information about prior names, affiliates, or underlying documents
- Avoid adopting names for real estate title with symbols or unusual spacing or punctuation that will result in unfamiliar alphabetizing
- Ensure names appear consistently throughout the document and in signatures
- Use a single document title from the common document types listed in the local rules
- Clearly set out a brief description of the property for indexing reference
- When the document is related to a prior recorded instrument (e.g., as with a satisfaction), clearly show the prior document’s recording information and the names of the parties to that prior instrument and their original capacities as grantors or grantees