



December 18th, 2015

UPGRADE NOTICE

Estate-a-Base® Version 17.4A is now available for upgrade. This release includes the amended Court Forms from the Ministry of the Attorney General, additional functionality to the Estate Information Return form and some valuable enhancements.

Amended and New Court Forms Now Available

We are pleased to announce that the amended (and new) Court Forms recently released by the Ministry of the Attorney General are now available in **Estate-a-Base** (refer to <http://www.ontariocourtforms.on.ca/english/civil> for a list of these forms).

Following is the list of forms that have been updated in Estate-a-Base:

- Form 74.7 - Notice of an Application for a Certificate of Appointment of Estate Trustee with a Will
- Form 74.13 - Certificate of Appointment of Estate Trustee with a Will
- Form 74.13.1 - Certificate of Appointment of Estate Trustee with a Will Limited to the Assets Referred to in the Will
- Form 74.23 - Certificate of Appointment of Succeeding Estate Trustee with a Will
- Form 74.23.1 - Certificate of Appointment of Succeeding Estate Trustee With a Will Limited to the Assets Referred to in the Will
- Form 74.28 - Confirmation by Resealing of Appointment of Estate Trustee

Following is the list of new forms we have added to Estate-a-Base:

- Form 74.12.1 - Consent to Applicant's Appointment as Estate Trustee With a Will Limited to the Assets Referred to in the Will
- Form 74.45.1 - Request for Further Notice in Passing of Accounts
- Form 74.49.4 - Reply to Notice of Objection to Accounts

Updates to the Estate Information Return (EIR) Form

In the Estate Information Return form, it is now possible to automatically insert the updated Probate value if the Probate amount was changed from when the Application was made.

- To support this feature, two new fields have been added to The Application topic. If you select "Yes" for "Have Probate Fees been paid with the Application?" then the original "Probate fees" field will be locked down and will indicate the total amount of deposit paid with the application for estate certificate (line 11 in the EIR form). The new "Probate fees after Application for Probate" field appears and displays the updated probate value still to be paid for the estate.
- The difference between these two values will appear in the EIR form in the "Net Amount of Tax Owning (or Refund)" field.
- If "No" is selected in the "Have Probate Fees been paid with the Application?" field, then you can make changes in the amounts for any assets and the Probate fee amounts will change accordingly.

EIR Appearance in Calendar – The calendar on the Home page now displays the due date for the Estate Information Return, as entered in the new field in The Application topic. Open the record with the matching EIR date by clicking on the "E" icon in the calendar and selecting the required record.

Life Insurance Policy – In the Estate Information Return form, the Life Insurance policy is populated in Section H as "other".

General Enhancements

Enhanced Compatibility – Estate-a-Base is compatible with Microsoft® Windows® 10 and Corel® WordPerfect® X7.

Update to Jurisdictions Database – The Regional Municipality of Halton has been added to the Jurisdictions database.

Change to Capital Receipt – A Capital Receipt with Realize Accruals Only option will now accept \$0.00 as a value when it is entered in the Revenue Interest field.

Probate Intake Form – Access a Word version of a Probate Intake Form from the **Go to** menu. Print the form and fill it in with estate-related information.

- To access the document, you must first upgrade to version 17.4A and then import the document, as follows:
 - Click **Updates > Import selected master documents from DPS_MAST.ZIP**.
 - In the **Import Selected Master Documents** box, click **\$INCLUDE\$**
 - Double-click **probatequestionnaire.doc** to tag it.
 - Click **Proceed [F2]** and confirm the import.

Need Help Upgrading?

All users must log out of **Estate-a-Base** during the upgrade. Then the Default user goes to **Configuration > Live Upgrade > [Check for Update]** and follows the installation directions. If you require further assistance, contact Customer Service at 1.866.367.7648 or inquiries@doprocess.com.