

Quick
Reference
Guide

Version 1.0
April 2021

NoticeConnect[®]
Integration in
Will Builder[®]

Will Builder® is now integrated with NoticeConnect's Canada Will Registry

We're excited to announce that Will Builder is now integrated with the Canada Will Registry to make it easy for you to register your Wills.

The Canada Will Registry is a quick, effective way to ensure the Wills in your vault can be easily found by anyone administering an estate. With over 260,000 Wills and growing, searching the Canada Will Registry has become a crucial step for estate administrators.


- You register your Wills at no charge by sharing information that can be used to identify a document, but not the document itself.
- When a law office or other estate administrator searches the registry for your Will, you will be notified who is searching for it and why.
- You then decide whether to disclose the existence and location of the Will.

With this new integration, not only are you able to register new Wills from within Will Builder, you can register your entire Will vault with the click of a button!

You can learn more about the Canada Will Registry [here](#) or see [our interview](#) with NoticeConnect's founder, Patrick Hartford, when the registry was first launched.

Note: To access the latest NoticeConnect integrations, Will Builder must be on Version 23.1A or higher.

1. Pop Up Banner

When you access a new or existing record, a banner for NoticeConnect appears for a few seconds. You can either click **Learn More** to read about the Canada Will Registry or click **No, thanks** to close the banner. Click the  icon that appears only in this topic to make the banner reappear. You also have the ability to **Register all your Wills now**. See Section 4 Registering All Your Documents with the Canada Will Registry on page 9.




To access the integration, you need NoticeConnect credentials.

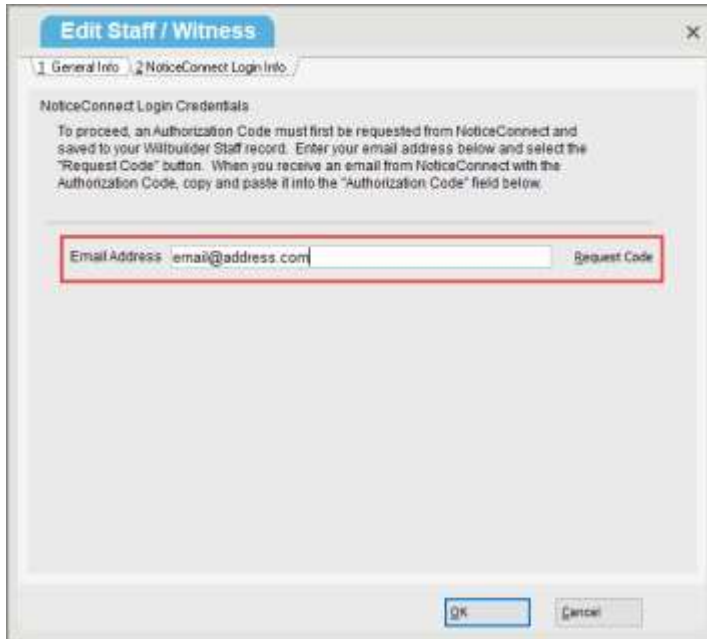
2. Creating/Updating NoticeConnect Credentials

To get started, all you need are **NoticeConnect credentials** for the lawyer.

Note: Only lawyers can have NoticeConnect credentials to register Estate Planning documents with the Canada Will Registry. To create credentials, go to [NoticeConnect.com](https://www.noticeconnect.com).

If you already have NoticeConnect credentials or have recently created credentials, you can add your NoticeConnect credentials either of the following ways:

1. Click on **Databases > 3. Staff & Witnesses**. Highlight the name of the solicitor to update and click **Edit**. Click on the **NoticeConnect Login Info** tab, enter your email address and click **Request Code**.
2. Click on  beside the Solicitor's Initials on Tab A of any record. Highlight the name of the solicitor to update and click **Edit**. Click on the **NoticeConnect Login Info** tab, enter your email address and click **Request Code**.



Edit Staff / Witness

General Info | NoticeConnect Login Info

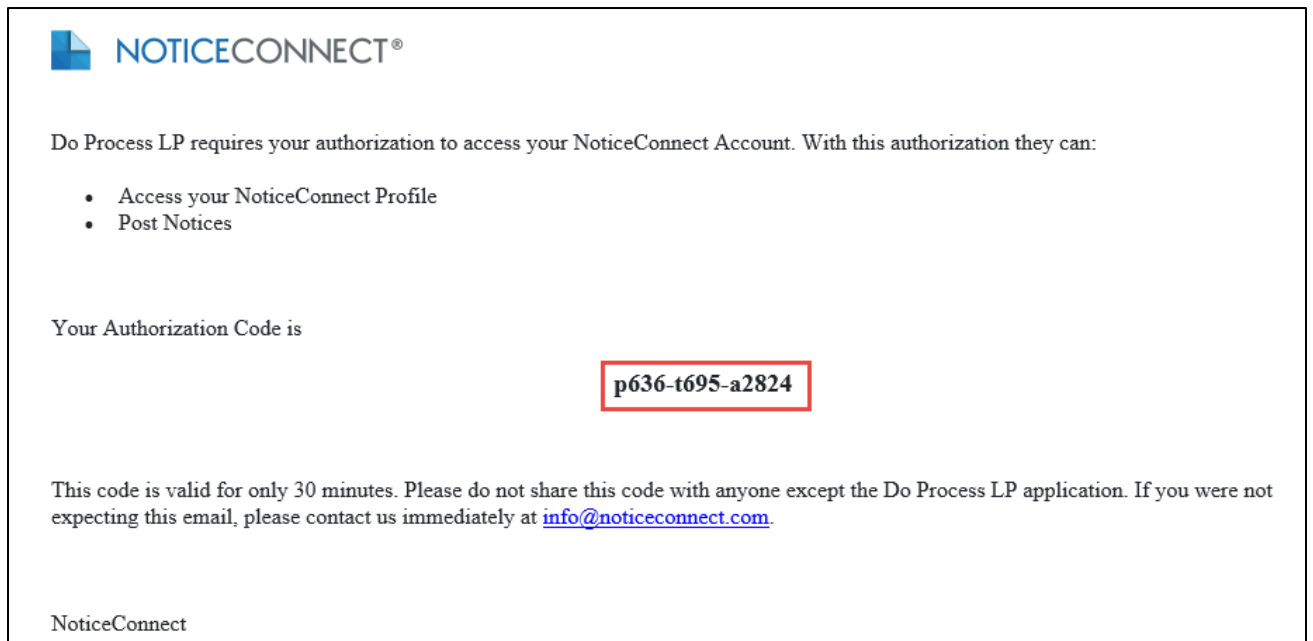
NoticeConnect Login Credentials


To proceed, an Authorization Code must first be requested from NoticeConnect and saved to your Willbuilder Staff record. Enter your email address below and select the "Request Code" button. When you receive an email from NoticeConnect with the Authorization Code, copy and paste it into the "Authorization Code" field below.

Email Address: Request Code

OK Cancel

An email will be sent to you from NoticeConnect with your authentication code. This authentication code is only useable for 30 minutes. Copy the **authentication code** from the email.



 **NOTICECONNECT®**

Do Process LP requires your authorization to access your NoticeConnect Account. With this authorization they can:

- Access your NoticeConnect Profile
- Post Notices

Your Authorization Code is

p636-t695-a2824

This code is valid for only 30 minutes. Please do not share this code with anyone except the Do Process LP application. If you were not expecting this email, please contact us immediately at info@noticeconnect.com.

NoticeConnect

Paste the code into the **Authorization Code** field on the Request Sent to NoticeConnect box. Click **Proceed**.



Request Sent to NoticeConnect

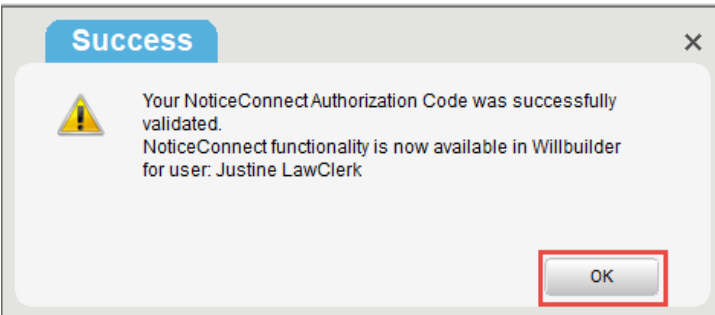
Your Authorization Code request was successfully sent to NoticeConnect. Please check your inbox for an email from NoticeConnect. This step must be completed in the next 15 minutes otherwise another request will be required.

Copy the Authorization Code from the NoticeConnect email and paste it into the field below:


Authorization Code: p536-8995-a2824

Proceed

You will be presented with a **Success** screen. Click **OK**.



Success

 Your NoticeConnect Authorization Code was successfully validated.
NoticeConnect functionality is now available in Willbuilder for user: Justine LawClerk

OK

You are now able to register your Wills and Powers of Attorney with the Canada Will Registry.

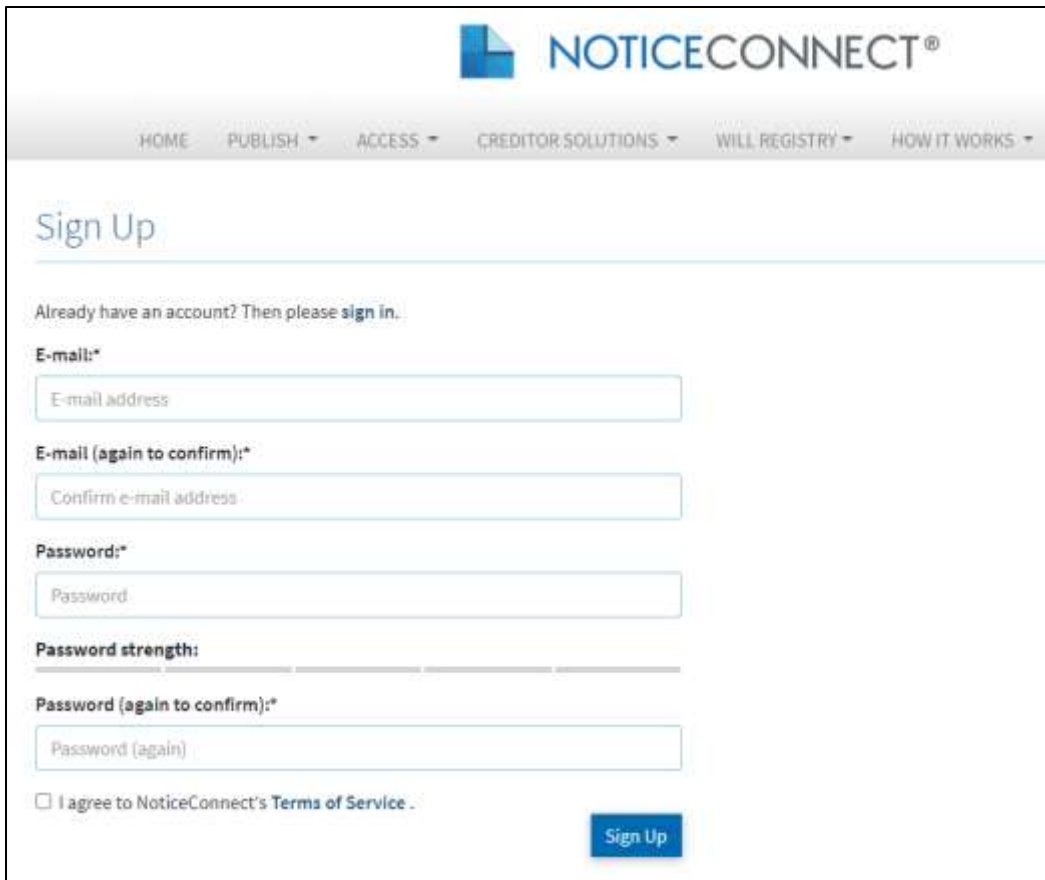
If you have not set up your NoticeConnect credentials and have requested a code from NoticeConnect, you will receive an **Error 400 – Communicating with NoticeConnect** asking if you set up your account at the NoticeConnect website. You can click **Sign Up** which will take you to the NoticeConnect Sign Up page where you can create credentials.



Error 400 - Communicating with NoticeConnect

Did you set up your account at the NoticeConnect website? If not, click the Sign Up button to create your NoticeConnect account and then repeat the Authorization process.

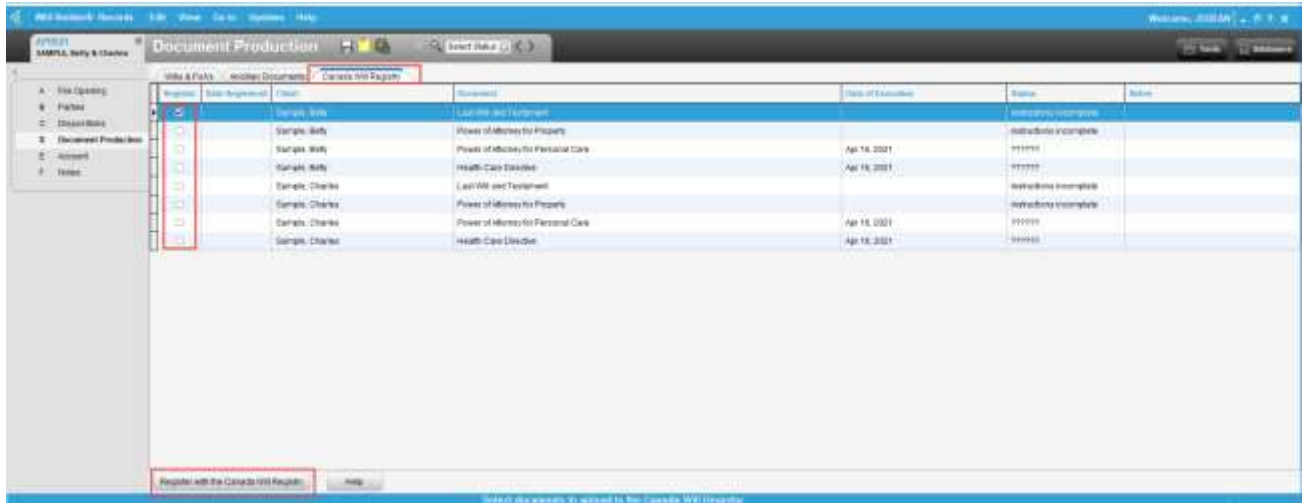
Sign Up Cancel



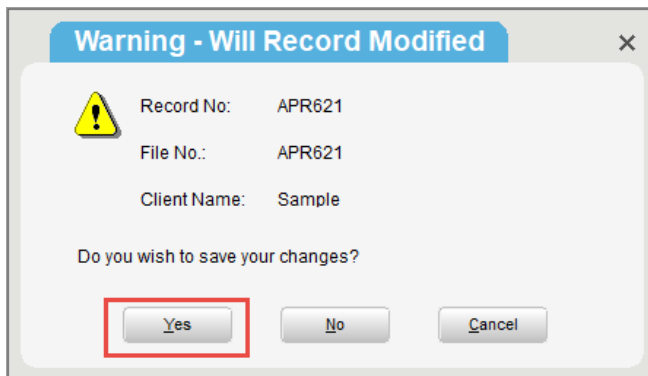
The screenshot shows the NoticeConnect website's sign-up page. At the top, the NoticeConnect logo is displayed. Below the logo is a navigation menu with links for HOME, PUBLISH, ACCESS, CREDITOR SOLUTIONS, WILL REGISTRY, and HOW IT WORKS. The main heading is "Sign Up". Below the heading, there is a link for users who already have an account. The form includes fields for E-mail, E-mail (again to confirm), Password, Password strength, and Password (again to confirm). There is also a checkbox for agreeing to the Terms of Service and a "Sign Up" button.

3. Registering Wills with the Canada Will Registry from within a Record

On Tab D of any record, there is now a **Canada Will Registry** tab. When you click on this tab, you have the option to register Wills, Powers of Attorney for Property/Personal Care and Health Care Directives. In the **Register** column, check the box beside any document that you would like to register with the Canada Will Registry.









Click **Register with the Canada Will Registry**. If you have made changes to your record without saving, a **Warning – Will Record Modified** will appear. Click **Yes** to save your changes.




Once your record has been saved, the **Register Documents with The Canada Will Registry** window will appear with the message. By clicking on **Proceed**, you agree to register your estate planning documents for free with the Canada Will Registry. Click **Proceed**.



When all selected documents have been successfully registered, the NoticeConnect icon  will appear beside the date in the Date Registered column for each applicable document.

Register	Date Registered	Client	Document
<input checked="" type="checkbox"/>	Apr 06, 2021 	Sample, Betty	Last Will and Testament
<input checked="" type="checkbox"/>	Apr 06, 2021 	Sample, Betty	Power of Attorney for Property
<input checked="" type="checkbox"/>	Apr 06, 2021 	Sample, Betty	Power of Attorney for Personal Care
<input checked="" type="checkbox"/>	Apr 06, 2021 	Sample, Betty	Health Care Directive
<input checked="" type="checkbox"/>	Apr 06, 2021 	Sample, Charles	Last Will and Testament
<input checked="" type="checkbox"/>	Apr 06, 2021 	Sample, Charles	Power of Attorney for Property
<input checked="" type="checkbox"/>	Apr 06, 2021 	Sample, Charles	Power of Attorney for Personal Care
<input checked="" type="checkbox"/>	Apr 06, 2021 	Sample, Charles	Health Care Directive

When you click on any one of the NoticeConnect icons , the **Canada Will Registry – Upload Details** screen will appear outlining the details of your registration.

Canada Will Registry - Upload Details

NoticeConnect ID: r576-1430-n0000
 Uploaded On: Apr 06, 2021
 Name: Betty Sample
 Birth Date:
 Address: 123 WillBuilder Drive, Toronto, Ontario M4M 4M4
 Name of Spouse: Charles Sample
 Executors: Charles Sample, John Robert Sample
 Document Type: Other
 Date of Execution:
 Storage Location: in our Wills vault
 Notes:
 Prepared By: Jodean Hendie

Upon successful registration you will receive a confirmation email from NoticeConnect.



Required Fields for Registering Wills with the Canada Will Registry using NoticeConnect

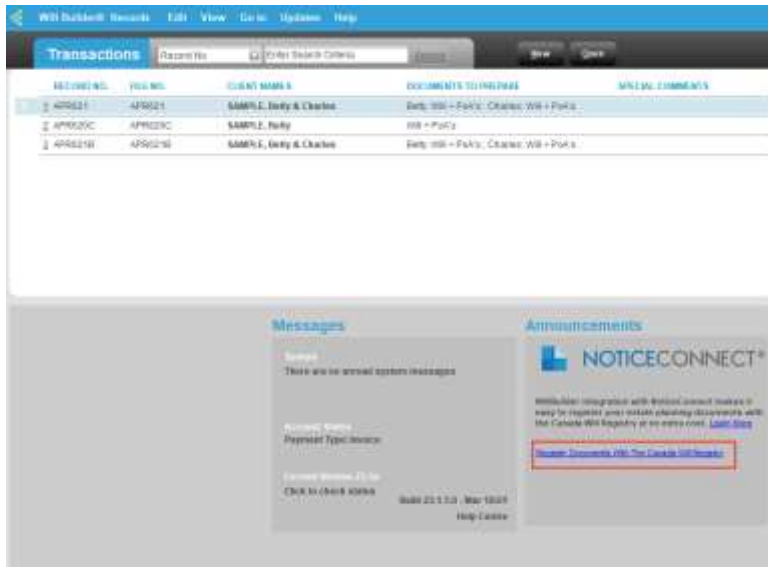
The following information will be passed to NoticeConnect from Will Builder fields:

- Record No. – Tab A
- Client(s) name – Add/Select client > Edit Client
- Testator date of birth – Add/Select Client > Edit Client
- Testators address – Add/Select client > Edit Client
- Type of document i.e. Will or POA – Tab D > Canada Will Registry
- Date of execution of document – Tab A
- Where document is stored – Tab A
- Executors (Exor) – Tab B
- Testator Spouse, if any – Add/Select client > Edit Client

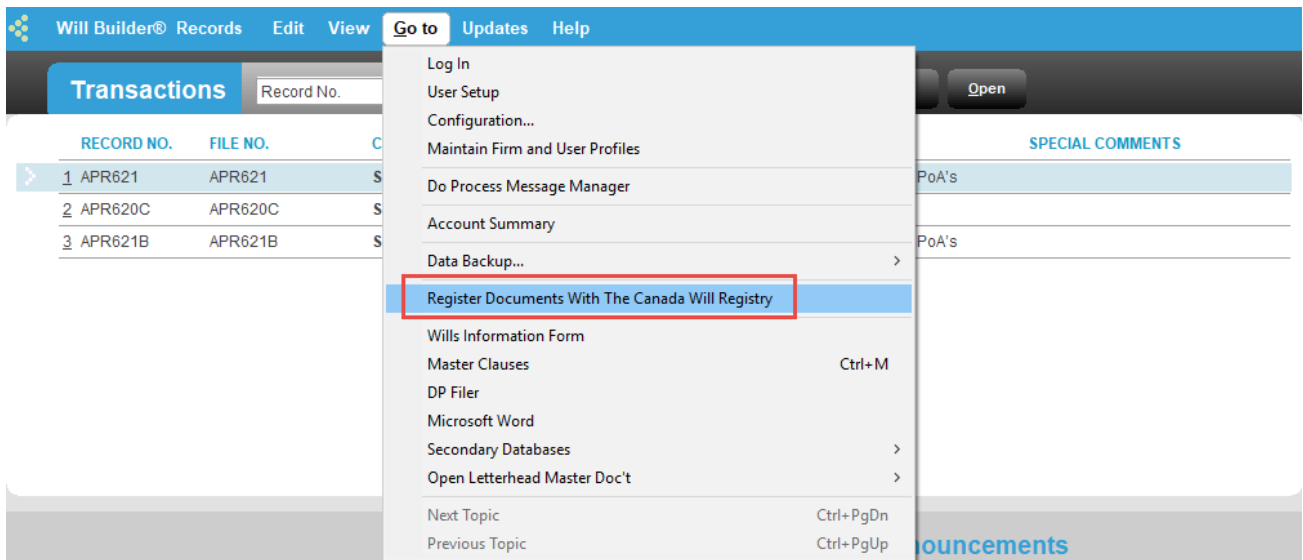
4. Registering All Your Documents with the Canada Will Registry

There are several places in Will Builder where you can register all your documents with the Canada Will Registry:

Option 1: Click on **Register Documents With The Canada Will Registry** in the **Announcements** section on the home page:



Option 2: Click **Go to > Register Documents With The Canada Will Registry**.



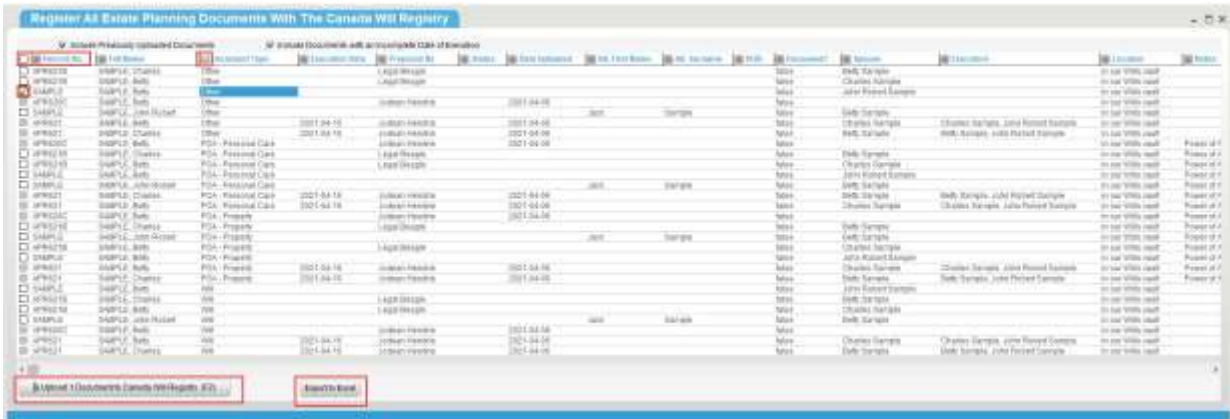
Option 3: Click **Register all your Wills now** button on the banner in Tab A.



No matter which option you choose, the **Register All Estate Planning Documents With The Canada Will Registry box** will appear with a list of all of your records and document types.

From this list you can do the following:

- To register your entire Will Vault including Powers of Attorney etc., check the box beside Record No.
- To register individual documents, check the box beside each document.
- To include previously uploaded documents in the list, check the box beside **Include Previously Uploaded Documents**. Uncheck the box if you do not want these documents uploaded.
- To include documents with an incomplete date of execution, check the box **Include Documents with an Incomplete Date of Execution**. Uncheck the box if you do not want these documents uploaded.
- You are also able to filter any column by clicking ▲ or ▼.
- To create a list of the items registered with the Canada Will Registry, click **Export to Excel**.

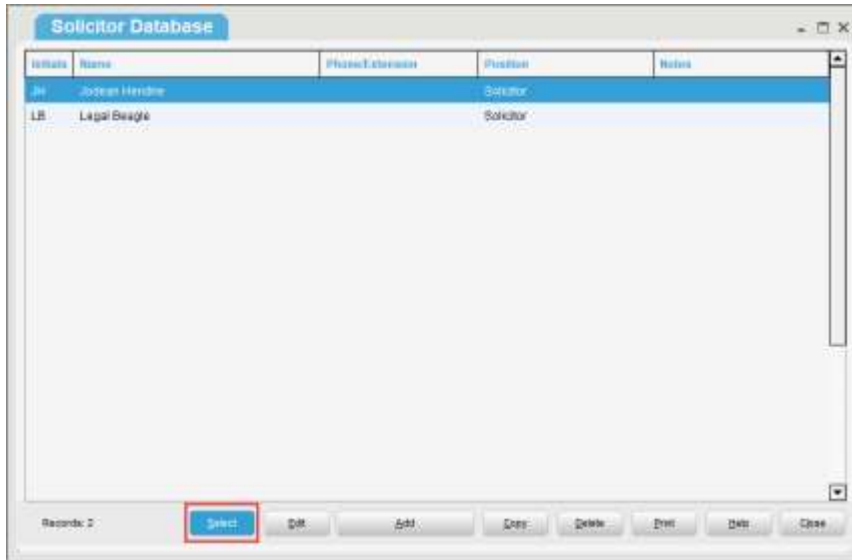


Once you have checked the documents to be registered, click **Upload Documents to Canada Will Registry** or **F2** on your keyboard.

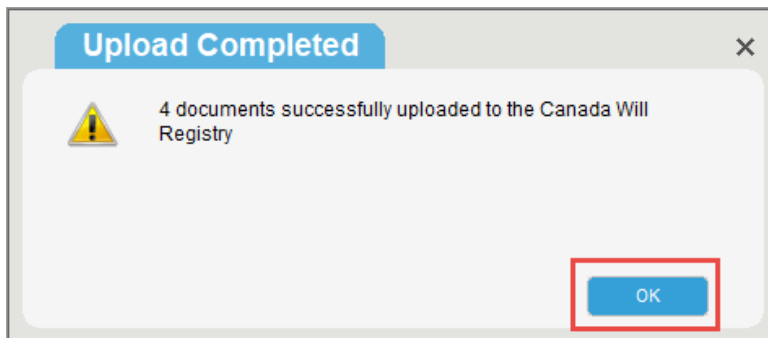
The **Select NoticeConnect User** window will appear. Click **Solicitors Database**.



The **Solicitor Database** window will appear. Highlight the solicitor with NoticeConnect credentials and click **Select**.



The **Upload Complete** window will appear indicating the number of documents successfully uploaded to the Canada Will Registry. Click **OK**.



Upon successful registration you will receive a confirmation email from NoticeConnect.



5. NoticeConnect Will Vault

You are able to view your registered documents by logging into **NoticeConnect**. To do so, select **My Will Vault** on the **Will Registry** tab, or click **My Will Vault** in the confirmation email received from **NoticeConnect**. You are now able to see all your registered documents, apply search filters, transfer records, and delete records. To learn more about the Canada Will Registry, click [here](#).