Quick

Reference

Guide

Version 3.0

May 2021

Brief Convey™ v10.7

LTSA Web Forms

User Guide

Brief Convey™ v10.7 and LTSA Web Forms User Guide

Web Filing is the next generation of the LTSA's secure and reliable electronic filing system and the introduction of Web Filing Forms is one of several steps towards streamlining land title submissions. The first phase of Web Filing **was introduced in mid-February 2020** with the release of a selection of Web Filing Forms.

This Guide addresses only the features and functionalities available in Brief Convey in relation to creating Web Filing Forms. It is strongly recommended that you familiarize yourself with the LTSA Web Filing service.

Contents

Glossary of Terms

"Package" – LTSA requires that a Package be created before any Web Filing Forms can be created. The Web Filing Forms are then held within the Package

"Application" – The generic term used to describe the Web Filing Forms

"Web Filing Form" – The document created at myLTSA that replaces the EFS PDF Forms previously used for electronic filing

Overview

The LTSA Web Forms tab in Brief Convey makes it quick and easy to create Packages and Applications and submit them to myLTSA in order to create the Web Filing Forms, saving you time by eliminating the need to rekey data.

This guide will show you how you can do the following using the LTSA Web Forms tab in Brief Convey and our integration with myLTSA Web Filing:

- Create Packages and Applications at myLTSA in a single step
- Add Applications to existing Packages created through Brief Convey at myLTSA
- Update an existing Package created through Brief Convey at myLTSA
- Delete an existing Package and all associated Applications in Brief Convey and at myLTSA in a single step
- Quickly jump to myLTSA to finalize, print, true up, and digitally sign Web Filing Forms

The LTSA Web Forms tab
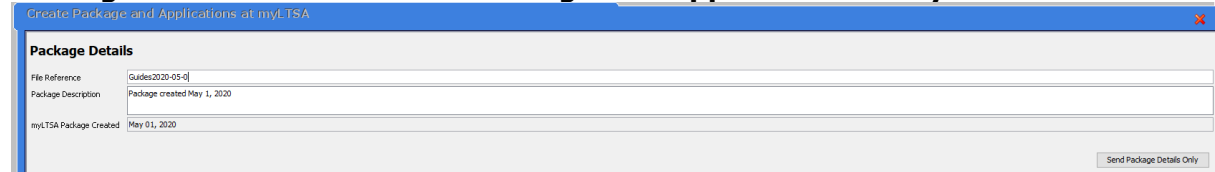
On the **LTSA Web Forms** tab you will see a grid labelled **Packages** with two columns, one labelled **File Reference** and the other labelled **Package Description**.

Use the **New** button to open the **Create Package and Applications at myLTSA** page and begin the process of creating Packages and Applications.
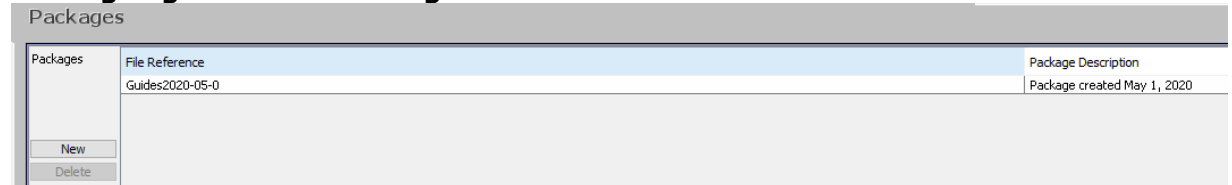
The Package Details Section

FIELDS & BUTTONS	FUNCTIONS
File Reference	Auto-populates with maximum 15 characters Mandatory and editable Data will be sent to myLTSA
Package Description	Population is optional Maximum 120 characters Describes Package for ease of reference Data will be sent to myLTSA
myLTSA Package Created	Auto-populates Read-only reference Date Package originally created at myLTSA
Send Package Details Only	Creates Package at myLTSA Sends data from *File Reference* and *Package Description* Auto-populates *myLTSA Package Created* Details of the *File Reference* and *Package Description* populate the Packages grid

Package Details on the Create Package and Applications at myLTSA screen

Packages grid on the Packages screen
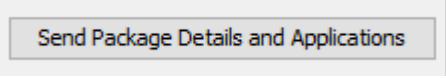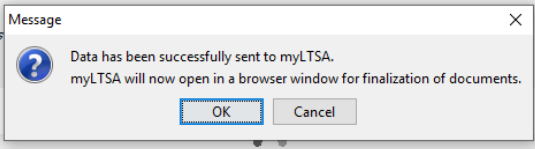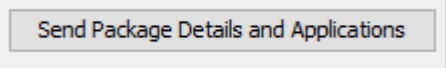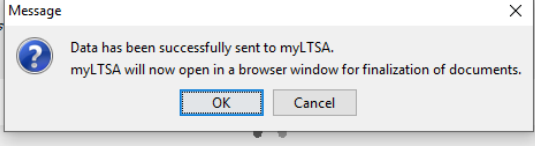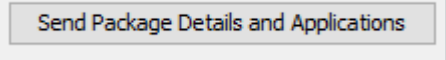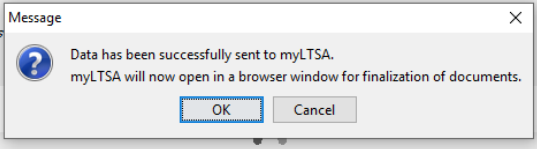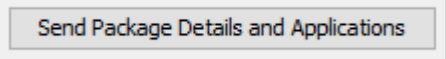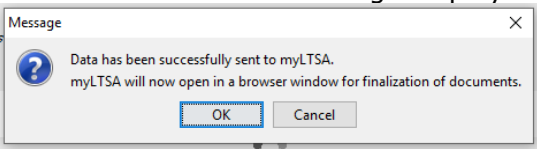
Use the **Delete** button on the Packages screen to delete existing Packages. Deleting a package from the grid will delete the package ***and the applications within it*** from both your Brief Convey file and from myLTSA.
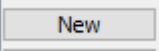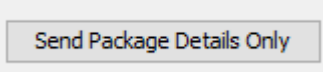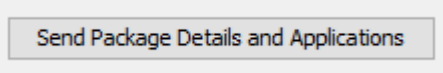
The Applications Section

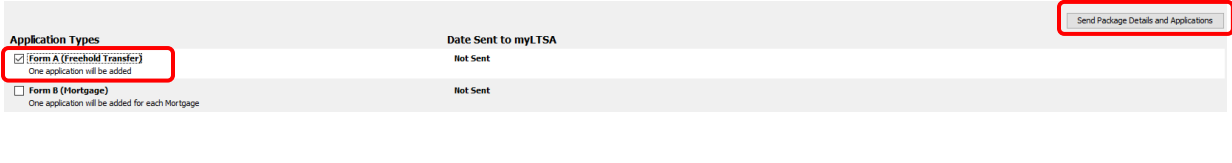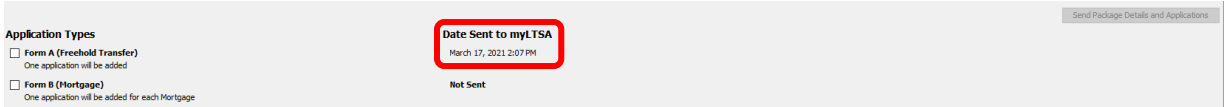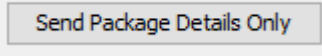| FIELDS & BUTTONS	FUNCTIONS
Application Types	List of available Applications to send to myLTSA dependent on the file type: Purchase Files – Form A (Freehold Transfer); Form B (Mortgage); PTT Return; Form C (Release); Form C (Charge); Form 17 (Cancellation of Charge, Notation or Filing); Form 17 (Charge, Notation or Filing); Form 17 (Fee Simple) Borrower (Mortgage only) Files – Form B (Mortgage); Form C (Release); Form 17 (Cancellation of Charge, Notation or Filing); Form 17 (Charge, Notation or Filing); Form 17 (Fee Simple) Sale Files – Form C (Release); Form 17 (Cancellation of Charge, Notation or Filing); Form 17 (Charge, Notation or Filing); Form 17 (Fee Simple)
Date Sent to myLTSA	Auto-populates Read-only reference Date Application(s) sent to myLTSA Updates each time Application(s) are sent
Send Package Details and Applications	Inactive by default Activated by selecting Application from Application Types list Creates or updates Package at myLTSA Adds Application(s) to Package at myLTSA

Selecting and sending Application(s)

	Send Package Details and Applications
Application Types	**Date Sent to myLTSA**
☑ **Form A (Freehold Transfer)** One application will be added	Not Sent
☐ **Form B (Mortgage)** One application will be added for each Mortgage	Not Sent

Package Details and Application(s) have been sent

	Send Package Details and Applications
Application Types	**Date Sent to myLTSA**
☐ **Form A (Freehold Transfer)** One application will be added	March 17, 2021 2:07 PM
☐ **Form B (Mortgage)** One application will be added for each Mortgage	Not Sent

Creating Packages and Applications

HOW DO I	AT THE LTSA WEB FORMS TAB	AND THEN WHAT?
Create a Package only at myLTSA	Select Send Package Details Only Send Package Details Only	The Package is created in Brief Convey and at myLTSA. The Package will appear on the myLTSA View All Packages page
Add Application(s) to the Package I just created and view my Package and Applications at myLTSA	Select the Application(s) from the Application Types list and *Send Package Details and Applications* Send Package Details and Applications Select *OK* on the message displayed Message ✕ ❓ Data has been successfully sent to myLTSA. myLTSA will now open in a browser window for finalization of documents. OK Cancel	**If you are logged into your myLTSA account outside of Brief Convey:** myLTSA will open on the Applications page in the Package created through Brief Convey **If you are not logged in to myLTSA:** myLTSA will open at the login page. Enter your login credentials to be moved to the Applications page in the Package created through Brief Convey
Add Application(s) to the Package I just created without myLTSA opening	Select the Application(s) from the Application Types list and select *Send Package Details and Applications* Send Package Details and Applications Select *Cancel* on the message displayed Message ✕ ❓ Data has been successfully sent to myLTSA. myLTSA will now open in a browser window for finalization of documents. OK Cancel	The Applications(s) have been added to the Package at myLTSA

HOW DO I	AT THE LTSA WEB FORMS TAB	AND THEN WHAT?
Create a Package and add Applications to it at myLTSA and then view them at myLTSA	Add a Package Description if you wish; select the Application from the Application Types list and select *Send Package Details and Applications* Send Package Details and Applications Select *OK* on the message displayed Message × Data has been successfully sent to myLTSA. myLTSA will now open in a browser window for finalization of documents. OK Cancel	**If you are logged into your myLTSA account outside of Brief Convey:** myLTSA will open on the Applications page in the Package created through Brief Convey **If you are not logged in to myLTSA:** myLTSA will open at the login page. Enter your login credentials to be moved to the Applications page in the Package created through Brief Convey
Create and add Applications to a Package at myLTSA without myLTSA opening	Add a Package Description if you wish; select the Application from the Application Types list and select *Send Package Details and Applications* Send Package Details and Applications Select *Cancel* on the message displayed Message × Data has been successfully sent to myLTSA. myLTSA will now open in a browser window for finalization of documents. OK Cancel	The Package has been created and the Applications(s) added to it at myLTSA

HOW DO I	AT THE LTSA WEB FORMS TAB	AND THEN WHAT?
Create additional Packages	On the Packages screen, select *New* New enter a Package Description (optional) and: ❖ To create a new Package in your file and at myLTSA, click the *Send Package Details Only* button Send Package Details Only ❖ To create a new Package **and** Applications at myLTSA, select the Application from the Application Types list and select *Send Package Details and Applications* Send Package Details and Applications	The result will be one of those set out above, dependent on which of the methods described to the left you select for creation of the additional package

The Web Filing Form

Once your Package with included Applications, and you, arrive at myLTSA, you can proceed with completing the Web Filing Form.

Populating the Web Filing Forms

The majority of the data required for completion of each Web Filing Form will be entered into your Brief Convey file and, in most instances, manual entry of data after the Web Filing Form has been produced will be very minimal. The exception to this rule is the PTT Form, which will require careful review and entry of data that is not in Brief Convey. The tables below set out the sections of each Web Filing Form that are populated with data from your Brief Convey file, and the data that populates them. The PTT Form table also contains additional important information on the functions of the form.

Form A (Freehold Transfer)	
Section of Web Filing Form	**Data from Brief Convey File**
Applicant	Your firm particulars
Description of Land	Parcel ID and Legal Description of **all** properties in your file
Transferor	<u>Individual Vendors</u> Name(s) <u>Corporate Vendors</u> Name(s), incorporation number(s)
Transferee	<u>Individual Purchasers</u> Name(s), occupation(s), address(es) Tenancy Fractional Interest <u>Corporate Purchasers</u> Name(s), incorporation number(s), address(es) Fractional Interest
Transfer Details	Transaction Type, ie. Fee Simple Sale Price $ Consideration $ Consideration Note
Execution	Name(s) of Individual/Corporate Vendors
Note: If your file has multiple properties in it, only one Form A (Freehold Transfer) will be created at myLTSA and will contain **all** PIDs and Legal Descriptions. If the Sale Price $ and/or Consideration $ fields are completed on each property, when the Update and Default buttons are selected, the values will be added together and the total will populate the Form A (Freehold Transfer) at myLTSA. Recommended best practice is to enter the total purchase price on the first property.	

Form B (Mortgage)

Section of Web Filing Form	Data from Brief Convey File
Applicant	Your firm particulars
Description of Land	Parcel ID and Legal Description of **all** properties in your file
Borrower (Mortgagor)	Individual Purchasers or Borrowers Name(s), occupation(s), address(es) Tenancy Fractional Interest Corporate Purchasers or Borrowers Name(s), incorporation number(s), address(es) Fractional Interest
Lender (Mortgagee)	Name, incorporation number and address of Lender(s)
Payment Provisions	All relevant data entered on the Form B Details screen will populate the related sections of the Web Filing Form, with the exception of the Guarantor name(s), which will populate from data entered on the New Mortgage screen.
Interest Mortgaged and Floating/Security Details	
Mortgage Terms	
Execution	Matter Details Lawyer/Notary name with firm details Individual Purchasers or Borrowers Name(s) Corporate Purchasers or Borrowers Name(s)
Part 2 or Informational Document	Property/New Mortgage Use the **Print Schedule** button located directly to the right of the Mortgage Product field to generate a standalone schedule for the Mortgage product selected. If the mortgage product has no associated schedule, the **Print Schedule** button will be greyed out. Hover over the button to see the tool tip "Mortgage product has no schedule". Once generated the schedule will be available on the Documents tab. It can be added to this section of the Form B (Mortgage) by dragging and dropping it from the Documents tab, or by saving to your local system and using the Choose PDF Files function.
Note: If your file has multiple mortgages in it, individual Form B (Mortgage) applications are created at myLTSA populated with the data relative to that mortgage.	

PTT Return

± indicates that this section of the application at myLTSA contains additional important information or direction.

Section of Web Filing Form	Data from Brief Convey File
±Transferees *Each Transferee, whether created through Brief Convey or manually on the PTT Form itself, becomes a subtopic under the Transferees topic. The information initially displayed is dependent on whether the Transferee is an individual or a corporation. Only the Transferee name can be changed. If additional information requires changing, the Transferee must be deleted and recreated. Selecting a transferee subtopic displays the fields where additional information has been populated from Brief Convey or can be entered manually.*	<u>Contacts</u> People or Corporation <u>Individual Purchasers</u> Name and address details, Residency, Exemption Claimed, % Interest Acquired, Social Insurance Number, Birth Date, Previous Address for Last Two Years for 1st Time Buyer <u>Corporate Purchasers</u> Name and address details, Exemption Claimed, % Interest Acquired The fields for the Previous Address for Last Two Years are only visible on the application at myLTSA if a first time home buyer exemption is being claimed. There is additional information required by the Minister of Finance for each Transferee that must be manually completed in this section as the data is not in Brief Convey.
±Contact Info	The fields in this section must be completed manually, if applicable, as the data is not in Brief Convey
Transferors	<u>Contacts</u> People or Corporation <u>Individual Vendors</u> Name and address details <u>Corporate Vendors</u> Name and address details There is additional information required by the Minister of Finance for each Transferor that must be manually completed in this section as the data is not in Brief Convey.

PTT Return

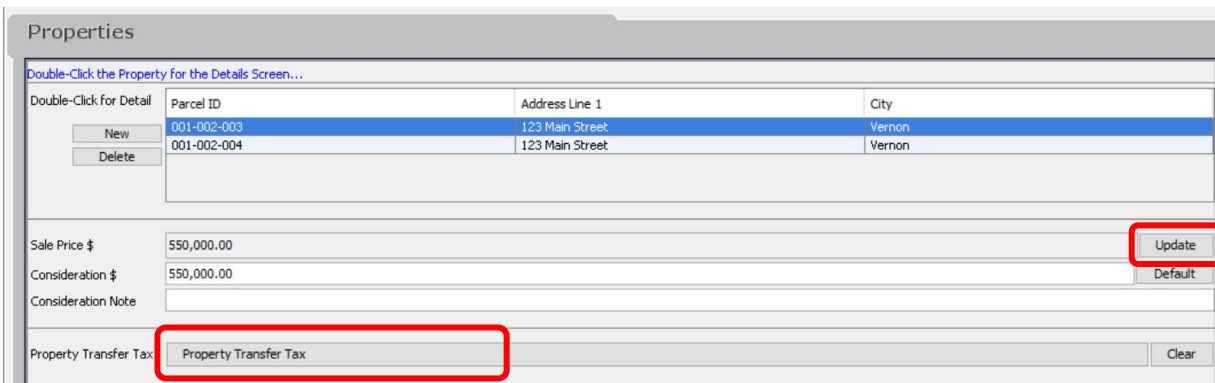|	
PTT Return **±** indicates that this section of the application at myLTSA contains additional important information or direction.	
Property Description *Use the Edit function in the Description of Land field in this section to select the appropriate Municipality and Regional District from the list provided. This is required information.*	File Matter or Transaction Completion Date Transaction Contract of Purchase and Sale Date Properties/Property Transfer Tax Transfer of i.e. Land with Improvements or Vacant Land Property Type Transaction Type, i.e. Fee Simple % Interest Acquired Property Civic address of property PID and Legal Description There is additional information required by the Minister of Finance which must be manually completed in this section as the data is not in Brief Convey.
±Terms **Brief Convey subtracts the data in the Mortgage Proceeds for Auth. To Pay field from the Sale Price $ field and populates the Funds (Cash) field in this section with the result*	Properties *Sale Price $ *less* Mortgage Proceeds for Auth. To Pay Consideration $ Consideration Note Property/New Mortgage/Form B Details _Mortgage Proceeds for Auth. To Pay Lender There is additional information required by the Minister of Finance which must be manually completed in this section as the data is not in Brief Convey.
±Allocation of Gross Purchase Price	This section is only visible under specific circumstances and must be completed manually as the data is not in Brief Convey
±Additional Info	The fields visible in this section are dependent on whether or not an exemption is being claimed and must be completed manually, if applicable, as the data is not in Brief Convey

PTT Return

± indicates that this section of the application at myLTSA contains additional important information or direction.

±Property Value Info	Properties Sale Price $ There is additional information required by the Minister of Finance which must be manually completed in this section as the data is not in Brief Convey.
Tax Calculation	The fields visible in this section are dependent on whether or not an exemption is being claimed and must be completed manually as the data is not in Brief Convey All dollar amounts in this section are auto-calculated by the form and no calculated amounts from Brief Convey populate this section
Funds Transfer Info	Settings/Company LTO Client # PTT Account Name
First Time Home Buyers	Purchasers/Individual/1st Time Buyer First Time Buyer checkbox This section is only visible on the form for each Transferee where the First Time Buyer checkbox has been selected in the file. It must be completed manually as the data is not found in Brief Convey
±Certification	Names of each Purchaser in the file

PTT Return

± indicates that this section of the application at myLTSA contains additional important information or direction.

Note: If your file has multiple properties in it, only one PTT Form will be created at myLTSA. The civic address from the *first* property entered in the file and *all* PIDs and Legal Descriptions will populate the form. Recommended best practice is:

- Enter all relevant property data, **EXCEPT** the Property Transfer Tax (Only if >1 Property) on each property
- Return to the main Properties screen and Update the data in the Sale Price $ field
- Use the Property Transfer Tax link to complete any data relevant to the Property Transfer Tax.

Form C (Release)

Section of Web Filing Form	Data from Brief Convey File
Applicant	Your firm particulars
Charge, Lien or Interest	Encumbrance Detail and Charge Number
Description of Land	Parcel ID and Legal Description of *all* properties in your file
Transferor	Name and incorporation number, if applicable of the Registered Owner of the encumbrance
Execution	Name of the Registered Owner of the encumbrance

Note: A Form C (Release) will be created at myLTSA for **each** encumbrance set to Remove in your Brief Convey file. If you have multiple properties with the same charge on each of them, one Form C (Release) will be created for each charge and will include *all* properties.

Form C (Charge)

Section of Web Filing Form	Data from Brief Convey File
Applicant	Your firm particulars
Description of Land	Parcel ID and Legal Description of **all** properties in your file
Transferee	<u>Individual Purchaser(s)</u> Name(s), occupation(s), address(es) Tenancy (purchase/borrower file) Fractional Interest (purchase/borrower files) <u>Corporate Purchaser(s)</u> Name(s), incorporation number(s), address(es) Fractional Interest (purchase/borrower files)
Execution	Name of the Purchaser(s)

Note: If your file has multiple properties in it, only one Form C (Charge) will be created at myLTSA and will contain **all** PIDs and Legal Descriptions.

Form 17 (Cancellation of Charge, Notation or Filing)

Section of Web Filing Form	Data from Brief Convey File
Applicant	Your firm particulars
Description of Land	Parcel ID and Legal Description of **all** properties in your file

Note: If your file has multiple properties in it, only one Form 17 (Cancellation of Charge, Notation or Filing) will be created at myLTSA and will contain **all** PIDs and Legal Descriptions.

Form 17 (Charge, Notation or Filing)

Section of Web Filing Form	Data from Brief Convey File
Applicant	Your firm particulars
Description of Land	Parcel ID and Legal Description of **all** properties in your file
Transferee	Individual Purchaser(s) Name(s), occupation(s), address(es) Tenancy (purchase/borrower file) Fractional Interest (purchase/borrower files) Corporate Purchaser(s) Name(s), incorporation number(s), address(es) Fractional Interest (purchase/borrower files)
Note: If your file has multiple properties in it, only one Form 17 (Charge, Notation or Filing) will be created at myLTSA and will contain **all** PIDs and Legal Descriptions.	

Form 17 (Fee Simple)

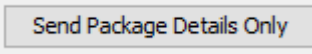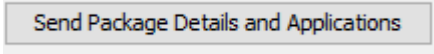| Section of Web Filing Form	Data from Brief Convey File
Applicant	Your firm particulars
Description of Land	Parcel ID and Legal Description of **all** properties in your file
Transferee	Individual Purchaser(s) Name(s), occupation(s), address(es) Tenancy (purchase/borrower file) Fractional Interest (all file types) Corporate Purchaser(s) Name(s), incorporation number(s), address(es) Fractional Interest (all file types)
Fee Simple Details	Consideration $ (purchase file) Sale Price $ (purchase file)
Note: If your file has multiple properties in it, only one Form 17 (Fee Simple) will be created at myLTSA and will contain **all** PIDs and Legal Descriptions. In a purchase file, if the Sale Price $ and/or Consideration $ fields are completed on each property, when the Update and Default buttons are selected, the values will be added together and the total will populate the Form 17 (Fee Simple) at myLTSA. Recommended best practice is to enter the total purchase price on the first property.	

Completing the Web Filing Form

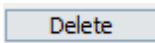| QUESTIONS	ANSWERS
How do I complete the Web Filing Form?	Move through the sections on the left side of the page to ensure all necessary data is completed and accurate. **Note:** Any changes made here will not be sent back to your Brief Convey file
Once I've completed the Web Filing Form, what can I do with it?	The completed Web Filing Form can be downloaded from myLTSA as a non-editable PDF file and: ❖ printed for signature by the appropriate party(s); and/or ❖ saved to a local folder; and/or ❖ once saved to a local folder, copied to your Brief Convey file **Note:** Depending on your browser settings and version of Adobe or other PDF reader, you may be required to save the PDF file locally before you are able to print it
If the Web Filing Form downloads as a non-editable PDF, how do I true it up and affix a digital signature in preparation for submitting it for registration?	Truing up the document and affixing a digital signature in preparation for registration must be done on the Application itself at myLTSA Try using our new myLTSA option from the Web Sites button for quick access to myLTSA

Working with Packages and Applications

After creating your Package(s) and Application(s) in Brief Convey, you are able to work with them as set out below.

Update or Change

I WANT TO	AT THE LTSA WEB FORMS TAB . .	AND THEN WHAT?
Make a change to an existing Package	Make your changes to the data in the *File Reference* and/or *Package Description* fields and update the Package by clicking the *Send Package Details Only* button to update the Package in your Brief Convey file and at myLTSA Send Package Details Only	The Package will be updated in your Brief Convey file and at myLTSA
Make a change to an existing Application	If data relevant to an existing Application changes in your Brief Convey file, select the relevant Application from the Application Types list and use the *Send Package Details and Applications* button to create new Application(s) at myLTSA Send Package Details and Applications	The result will be the creation of a new Application in the existing Package at myLTSA incorporating the changes from your Brief Convey file Applications that are no longer required can be deleted at myLTSA Once an Application has been sent to myLTSA it cannot be modified through Brief Convey

Delete

I WANT TO	AT THE LTSA WEB FORMS TAB . .	AND THEN WHAT?
Delete a Package from my Brief Convey file	Select the Package you wish to delete from the grid on the Packages screen and select *Delete* Delete	The Package and all Applications within it will be removed from your Brief Convey file and from myLTSA
Delete an Application from Brief Convey that I sent to myLTSA	Deleting an Application without deleting the Package cannot be done in Brief Convey, it must be done at myLTSA	N/A

Easy Access to myLTSA

From Brief Convey, you can easily navigate to myLTSA from the Web Sites icon by selecting the myLTSA option from the dropdown list. The Web Sites icon is located at the top of the Brief Convey file matter window.
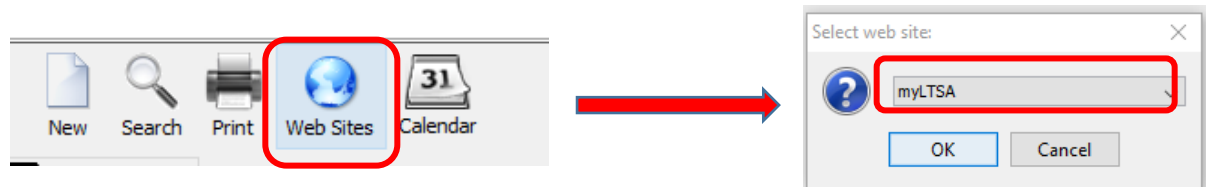
If you are currently logged in to myLTSA and your Brief Convey file contains	
One Package	You will land on the myLTSA Applications page in the Package
Multiple Packages	You will land on the myLTSA Applications page in the Package that is displayed first in the list of packages on the LTSA Web Forms tab
No Packages	You will land on the myLTSA Home Page

If you are not currently logged in to myLTSA and your Brief Convey file contains	
One Package	You will land on the myLTSA login page. Enter your login credentials to be taken to the myLTSA Applications page in the Package
Multiple Packages	You will land on the myLTSA login page. Enter your login credentials to be taken to the myLTSA Applications page in the Package that is displayed first in the list of packages on the LTSA Web Forms tab
No Packages	You will land on the myLTSA login page

FAQs

QUESTIONS	ANSWERS
Why would I want to go to myLTSA after I choose to Send Package Details and Applications through my file in Brief Convey?	Package management and completion of any additional data in the Web Filing Form is done at myLTSA. When using the Web Filing Forms feature, no documents are created on your local system. Instead, a Web Filing Form is created for each Application at myLTSA The Web Filing Form at myLTSA can be downloaded and printed for signing, as well as saved to a local folder and copied to your Brief Convey file **Note:** Depending on your browser settings and version of Adobe or other PDF reader, you may be required to save the PDF file locally before you are able to print it
Why is my Package still in my Brief Convey file after I deleted it at myLTSA?	Deleting a Package at myLTSA that was created through Brief Convey will not delete the package from Brief Convey
If I change data in an Application at myLTSA that was created through Brief Convey, will it change the related data in my Brief Convey file?	No, data does not flow from myLTSA back to Brief Convey. If you require the same change to the data in your Brief Convey file, you will have to make the change in Brief Convey
Can I submit Web Filing Forms for registration through Brief Convey's e-filing feature?	Yes, you can. Once the form has been trued up and digitally signed at myLTSA, it can be downloaded and saved to a local folder and then copied to your Brief Convey file in preparation for submitting it for registration **NOTE:** When saving the web filing form for this purpose, the name must include a variation of "efile", i.e. Efile or EFILE or E-file or E-File or E-FILE

Support

For support using the Web Forms features in Brief Convey please contact DoProcess Customer Support at 1.866.367.7648 or inquiries@doprocess.com.

For support using the LTSA Web Filing features, please contact LTSA Customer Service at 604.630.9630 or 1.877.577.5872 or customerservice@ltsa.ca.

For additional information about LTSA Web Filing, click https://help.ltsa.ca/myLTSA-enterprise/electronic-filing/web-filing.