

Quick
Reference
Guide

Version 1.0
August 2020

NoticeConnect[®]
Integrations in
Estate-a-Base[®]

The NoticeConnect integration in Estate-a-Base® just got better. Not only can you post a Notice to Creditors from within Estate-a-Base, now you and your clients will benefit from the many advantages of using the Combined Registry Search from within Estate-a-Base as well. This combined functionality searches over 200,000 Wills in the Canada Will Registry and also searches for unregistered Wills by sending a Knowledge of a Will Notice to NoticeConnect's mailing list which includes law firms, law libraries, and other partners. If a Search Query matches with a registered will, the firm that registered the will is notified and given 30 days to contact you. Furthermore, a Search Certificate is emailed to you regardless of whether a matching Will is found, confirming that you took appropriate steps to look for a Will, reducing your liability.

The Combined Registry Search or publishing a Notice to Creditors provide many advantages to you and your clients:

Why search for a Will: Searching the Canada Will Registry is an important step when administering an estate to ensure that you have taken effective steps to find a Will or the most recent Will.

- **Due diligence:** Failing to properly look for a Will can result in liability. A Search Certificate from the Canada Will Registry serves as proof that you took effective steps to find all relevant documents.

Why post a Notice to Creditors: Reduce both legal liability and estate trustee liability from outstanding creditors. Publish legal notices at a fraction of the cost and to a wider geographical area compared to traditional newspaper ads. Further reduce your administrative risk profile as notices are sent directly to subscribing law offices and major credit institutions across Canada.

- **Disbursable:** Submitting a combined Registry Search or posting a Notice to Creditors costs \$170.00 each. This cost can be disbursed to the estate.
- **Time savings:** Save valuable time and eliminate duplicate data entry by using the client information already entered into Estate-a-Base.

Note: To access the latest NoticeConnect integrations, Estate-a-Base must be Version 22.2A or higher.

1. Pop Up Banner Tab B

When you access **The Deceased** topic (Tab B) in a testate record, a banner for NoticeConnect appears for a few seconds. You can either click **Learn More** to read about NoticeConnect or click **No, thanks** to close the banner. Click the  icon that appears only in this topic to make the banner reappear.



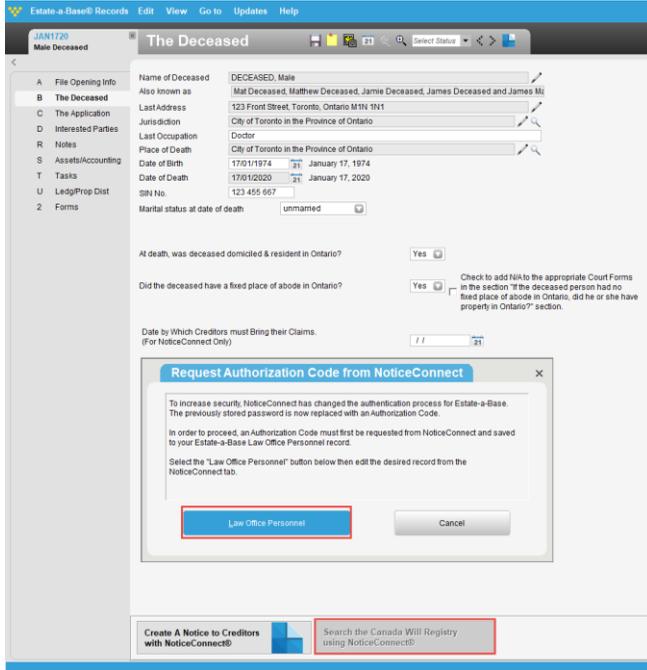
To use the integration, NoticeConnect credentials are required.

2. Creating/Updating NoticeConnect Credentials

To get started, all you need are **NoticeConnect credentials** for the lawyer and law clerk working on the estate file. To create credentials, go to [NoticeConnect.com](https://www.noticeconnect.com).

If you already have NoticeConnect credentials, simply enter those in your staff profile on the *NoticeConnect Login Info* tab. If you have already entered your Notice Connect Credentials, you will be required to request an authentication code from NoticeConnect. You can do this from Tab A by clicking on  beside the lawyer or law clerk. Select the name of the personnel with the NoticeConnect credentials and click on **Request Code**. You can also complete this step in Tab B by clicking on **Search the Canada Will Registry using NoticeConnect®** button or the **Create A Notice to Creditors with NoticeConnect®**.

The message shown below will be displayed; click the **Law Office Personnel** button.



Request Authorization Code from NoticeConnect

To increase security, NoticeConnect has changed the authentication process for Estate-a-Base. The previously stored password is now replaced with an Authorization Code.

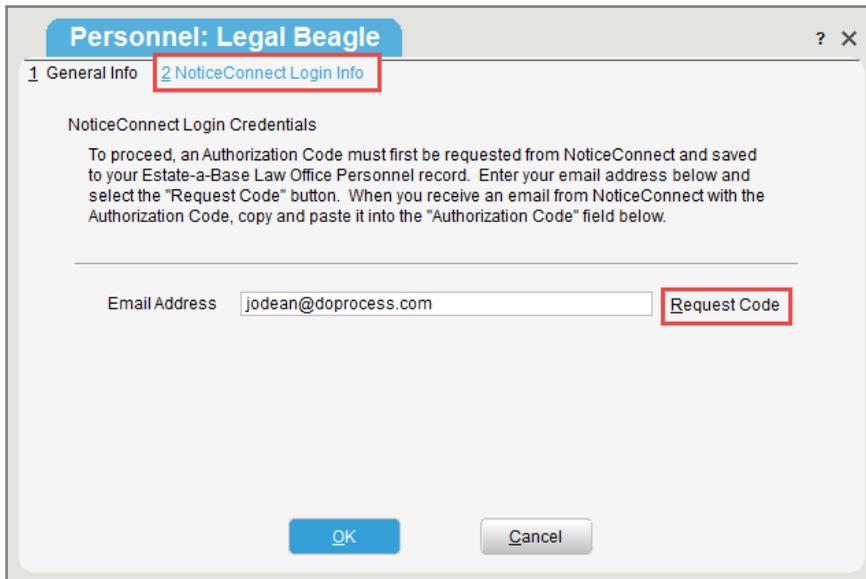
In order to proceed, an Authorization Code must first be requested from NoticeConnect and saved to your Estate-a-Base Law Office Personnel record.

Select the "Law Office Personnel" button below then edit the desired record from the NoticeConnect tab.

Law Office Personnel Cancel

Create A Notice to Creditors with NoticeConnect Search the Canada Will Registry using NoticeConnect

Highlight the name of the personnel to update, click on the **NoticeConnect Login Info** tab, enter your email address, and click **Request Code**.



Personnel: Legal Beagle ? X

1 General Info **2 NoticeConnect Login Info**

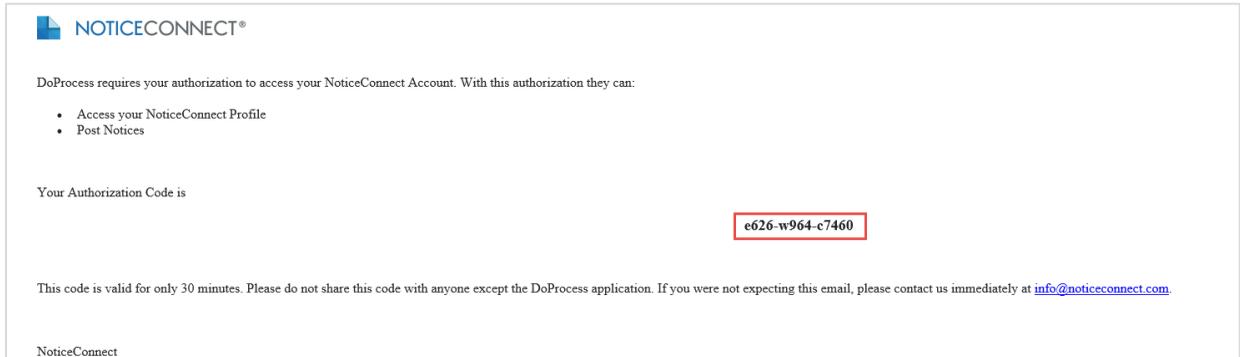
NoticeConnect Login Credentials

To proceed, an Authorization Code must first be requested from NoticeConnect and saved to your Estate-a-Base Law Office Personnel 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.

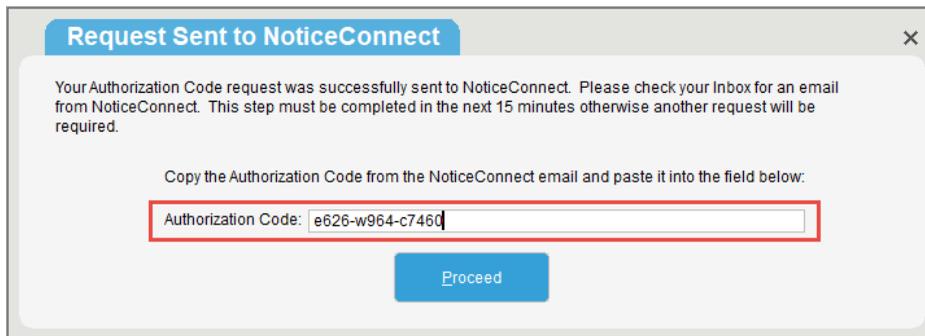
Email Address **Request Code**

OK Cancel

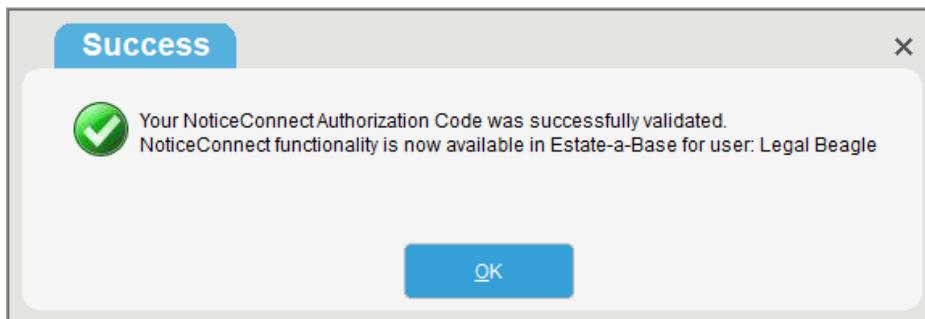
An email will be sent to you from NoticeConnect with your authentication code. This authentication code is only useable for 30 minutes. Copy the **authentication code** from the email.



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



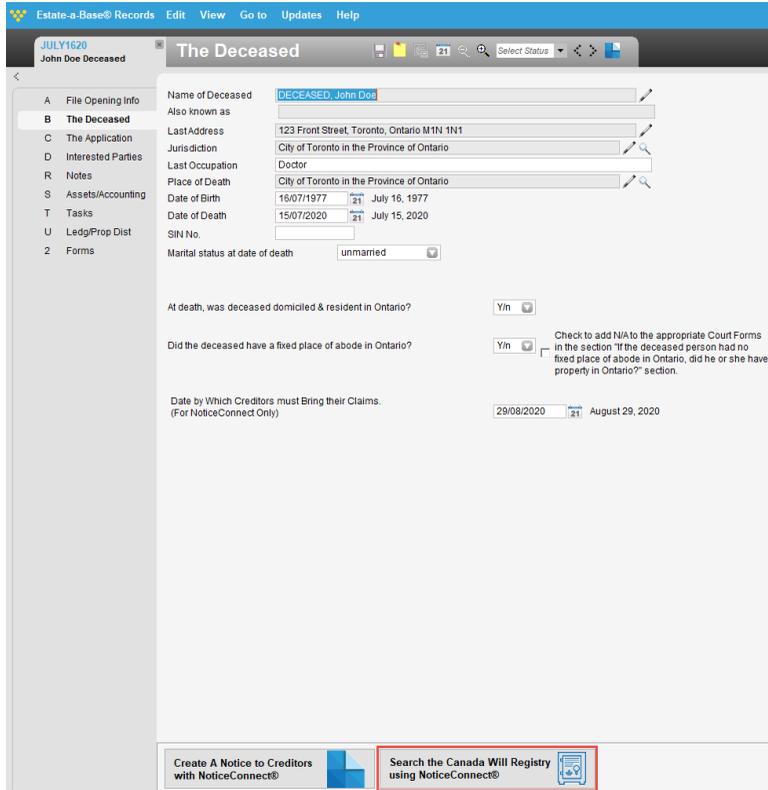
You will be presented with a **Success** screen.



You are now able to complete a combined search of the Canada Will Registry and Create a Notice to Creditors with NoticeConnect with a few simple clicks.

3. Creating a Search of the Canada Will Registry

Click on the **Search the Canada Will Registry using NoticeConnect®** button in Tab B.



Estate-a-Base® Records Edit View Go to Updates Help

JULY1620
John Doe Deceased

The Deceased

Name of Deceased: DECEASED, John Doe

Also known as: [Empty]

Last Address: 123 Front Street, Toronto, Ontario M1N 1N1

Jurisdiction: City of Toronto in the Province of Ontario

Last Occupation: Doctor

Place of Death: City of Toronto in the Province of Ontario

Date of Birth: 15/07/1977 July 16, 1977

Date of Death: 15/07/2020 July 15, 2020

SIN No.: [Empty]

Marital status at date of death: unmarried

At death, was deceased domiciled & resident in Ontario? Ym

Did the deceased have a fixed place of abode in Ontario? Ym Check to add N/A to the appropriate Court Forms in the section "If the deceased person had no fixed place of abode in Ontario, did he or she have property in Ontario?" section.

Date by Which Creditors must Bring their Claims. (For NoticeConnect Only): 29/08/2020 August 29, 2020

Create A Notice to Creditors with NoticeConnect®

Search the Canada Will Registry using NoticeConnect®

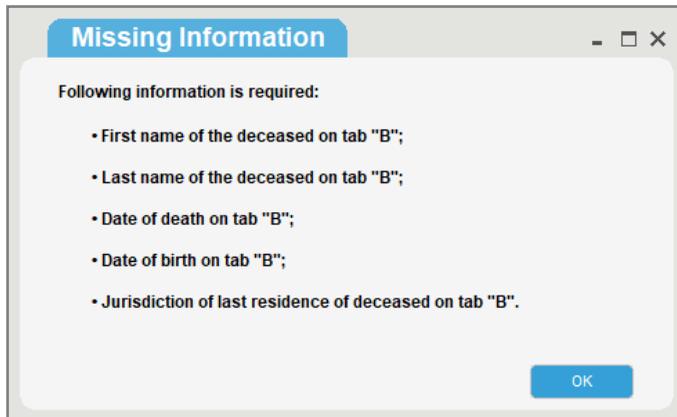
a. Required Fields for Search the Canada Will Registry using NoticeConnect

The following information will be passed to NoticeConnect from the Estate-a-Base fields:

- First name of the deceased on Tab B
- Last name of the deceased on Tab B
- Date of death on Tab B
- Date of birth on Tab B
- Jurisdiction of last residence of deceased on Tab B

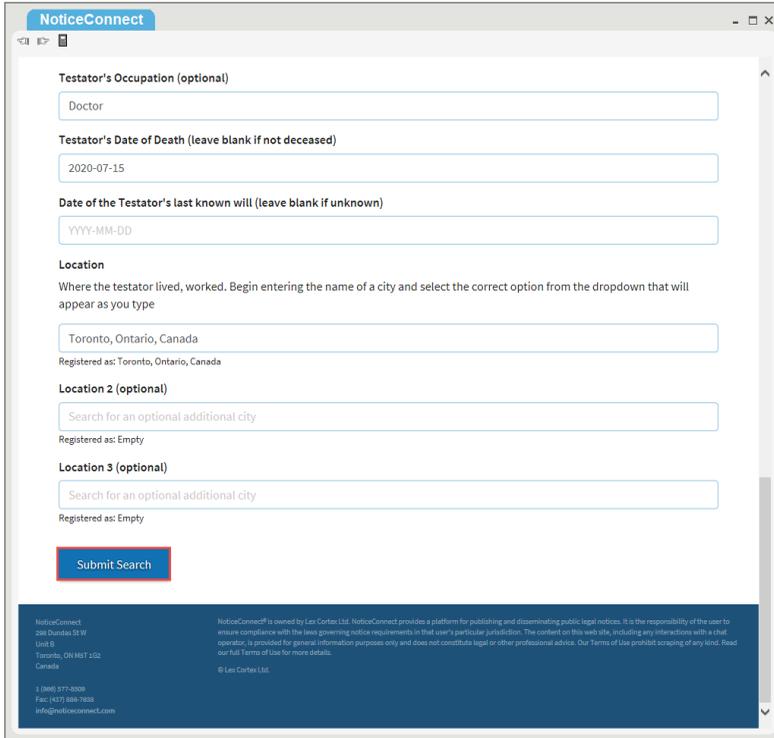
b. Missing Fields

Should any of the above information be missing from Tab B, you will be presented with a **Missing Information** box which will indicate which fields are missing. Click **OK** and proceed to the appropriate field to enter the information.



Once all the information has been entered, you will be able to proceed with the Combined Search of the Canada Will Register and posting a Knowledge of a Will notice by clicking on the **Search the Canada Will Registry using NoticeConnect®** button. The embedded window (see below) will appear showing all information passed from the associated Estate-a-Base field to the NoticeConnect field. At this point you are able to edit the data in the NoticeConnect fields.

Note: Data entered in the NoticeConnect embedded window will not pass back to the appropriate fields in Estate-a-Base. To keep the information accurate in both programs, it is recommended that you make any changes in the Estate-a-Base field and submit your search to NoticeConnect again.



c. Submit Search

When you are ready to submit your search, click on the **Submit Search** button. You will be presented with the **Is all the information you entered correct?** screen. This screen provides a warning to make sure all the information that you entered is correct. You will not be able to make changes after you submit the search. If you are required to make changes before the search, click on the **Continue Editing** button where you will be taken back to the previous screen. If you are happy with the information you have entered, click the **Confirm Submit** button. When you click the **Confirm Submit** button, you are also agreeing to NoticeConnect's Terms of Service.

Is all the information you entered correct?

Please make sure all the information you entered is correct. You will NOT be able to change these details afterwards. To make changes, please click "Continue Editing". If you are finished please click "Confirm Submit".

By clicking "Confirm Submit", you agree to the [Terms of Service](#).

How Our Service Works

*Your Search terms will be matched against registered wills and we will email you a Search Certificate for your records immediately upon payment. You will not see the direct results of your search. If someone has a matching will, they will contact you directly before **2020-08-29**.*

Consent to Share Information

Your search terms and contact information will be shared with a NoticeConnect user that has registered a matching will, so that they may contact you.

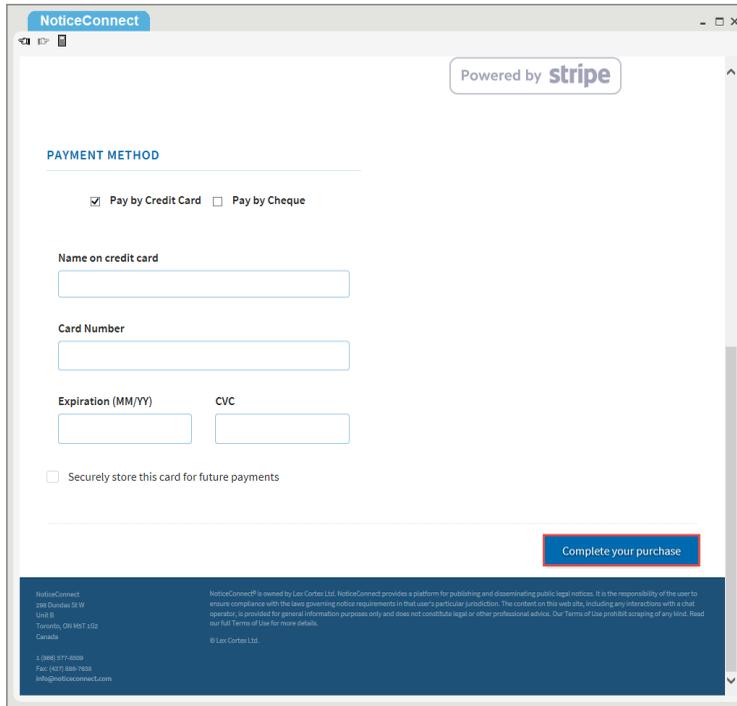
Knowledge of a Will Notice

To search for unregistered wills, we will publish a notice on our website and share it with our mailing list, law associations, and other partners. Your name and contact information will be included in this notice.

[Continue Editing](#) [Confirm Submit](#)

d. Payment Method

After you have clicked **Confirm Submit**, you will be presented with the NoticeConnect **Payment Method** page where you can pay by cheque or credit card. After you choose your payment method, click **Complete Your Purchase**.



NoticeConnect
Powered by stripe

PAYMENT METHOD

Pay by Credit Card Pay by Cheque

Name on credit card

Card Number

Expiration (MM/YY) CVC

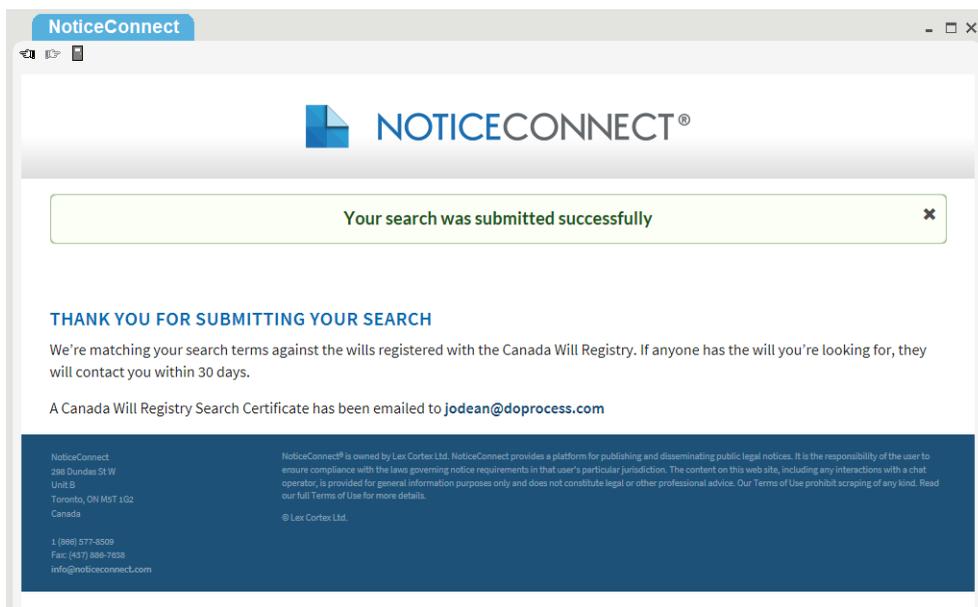
Securely store this card for future payments

[Complete your purchase](#)

NoticeConnect
290 Dundas St W
Unit B
Toronto, ON M5T 1G2
Canada
1 (888) 577-8509
Fax: (437) 886-7838
info@noticeconnect.com

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Once you have completed your purchase you will be presented with the screen below indicating that **Your Search was submitted successfully** and you will receive a receipt by email from NoticeConnect.



NoticeConnect

 **NOTICECONNECT®**

Your search was submitted successfully

THANK YOU FOR SUBMITTING YOUR SEARCH

We're matching your search terms against the wills registered with the Canada Will Registry. If anyone has the will you're looking for, they will contact you within 30 days.

A Canada Will Registry Search Certificate has been emailed to jodean@doprocess.com

NoticeConnect
290 Dundas St W
Unit B
Toronto, ON M5T 1G2
Canada
1 (888) 577-8509
Fax: (437) 886-7838
info@noticeconnect.com

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e. Search Certificate

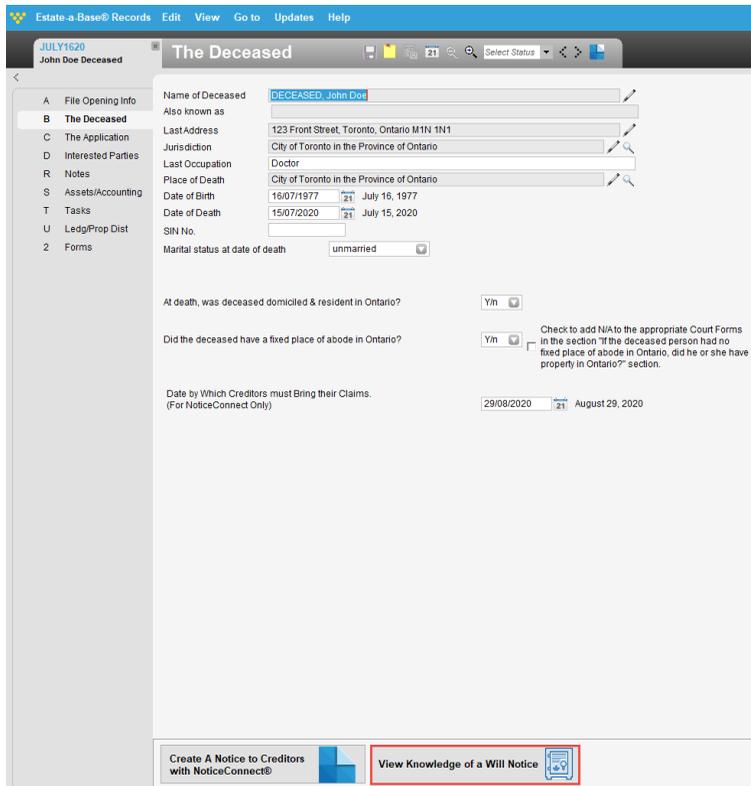
You will also receive a Search Certificate from NoticeConnect by email. Retain this receipt in your file as proof that you have taken the necessary steps to locate a Will.

Note: If a Search Query finds a firm with a matching Will, the representatives have 30 days to contact you.

Canada Will Registry		NOTICECONNECT®	
		298 Dundas St. W. Unit B, Toronto, ON M5T 1G2 NoticeConnect.com info@NoticeConnect.com 1-866-577-8509	
Search Certificate			
Summary			
Date:	July 30, 2020		
Time:	17:43 UTC		
Search No.:	M606-Q836-Y3000		
User:	DoProcess		
Search Details			
Searched Name:	John Doe Deceased		
Alternate First Name:	-		
Alternate Surname:	-		
Date Of Birth:	July 16, 1977		
Date Of Death:	July 15, 2020		
Searcher's Relationship To The Testator:	John Testator		
Contact Person:	Legal Beagle		
Contact information:	Legal Beagle 123 Front Street Toronto, Ontario M1N 1N1 Phone: Ext. 34 Email: inquiries@doprocess.com		
Search Type:	Combined Registry Search (Checks Canada Will Registry And Publishes Knowledge Of A Will Notice)		
NOTES			
Anyone with a matching will has been instructed to disclose it by August 29, 2020.			
The Canada Will Registry has 100,000 registered wills.			

f. View Knowledge of a Will Notice

Your Search of the Canada Will Registry and search for unregistered Wills by posting a Knowledge of a Will notice have now been completed. You can view the Knowledge of a Will Notice at any time by clicking on the **View Knowledge of a Will Notice** button on Tab B.



Estate > Base® Records Edit View Go to Updates Help

JULY1620
John Doe Deceased

The Deceased Select Status

A File Opening Info
B The Deceased
C The Application
D Interested Parties
R Notes
S Assets/Accounting
T Tasks
U LedgProp Dist
2 Forms

Name of Deceased DECEASED, John Doe
Also known as
Last Address 123 Front Street, Toronto, Ontario M1N 1N1
Jurisdiction City of Toronto in the Province of Ontario
Last Occupation Doctor
Place of Death City of Toronto in the Province of Ontario
Date of Birth 15/07/1977 July 16, 1977
Date of Death 15/07/2020 July 15, 2020
SIN No.
Marital status at date of death unmarried

At death, was deceased domiciled & resident in Ontario? Y/n

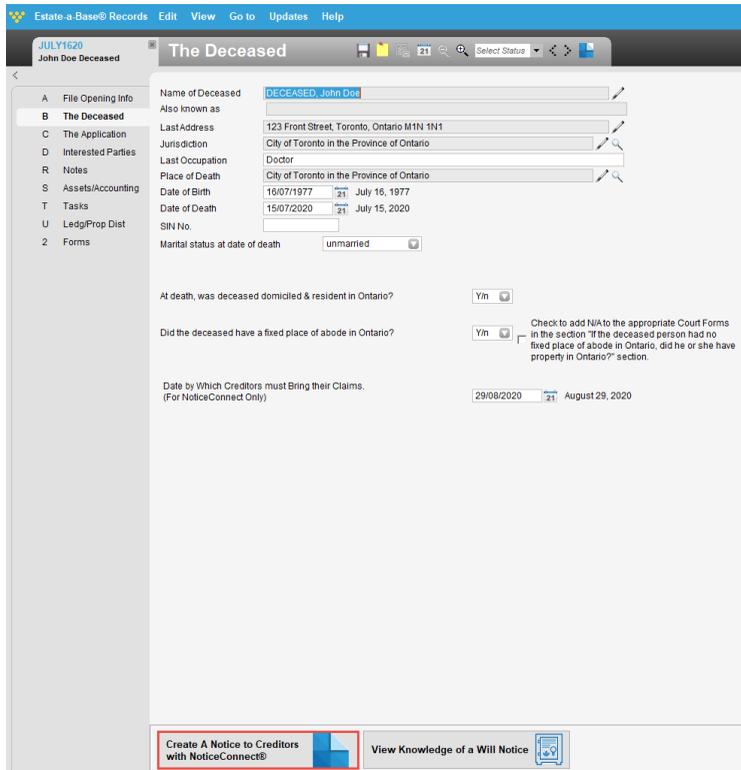
Did the deceased have a fixed place of abode in Ontario? Y/n
Check to add N/A to the appropriate Court Forms in the section "If the deceased person had no fixed place of abode in Ontario, did he or she have property in Ontario?" section.

Date by Which Creditors must Bring their Claims.
(For NoticeConnect Only) 29/08/2020 August 29, 2020

Create A Notice to Creditors with NoticeConnect®  **View Knowledge of a Will Notice** 

4. Create A Notice to Creditors

To create a Notice to Creditors, simply click the **Create A Notice to Creditors with NoticeConnect®** button on **Tab B**.



All data will pass from Estate-a-Base to NoticeConnect.

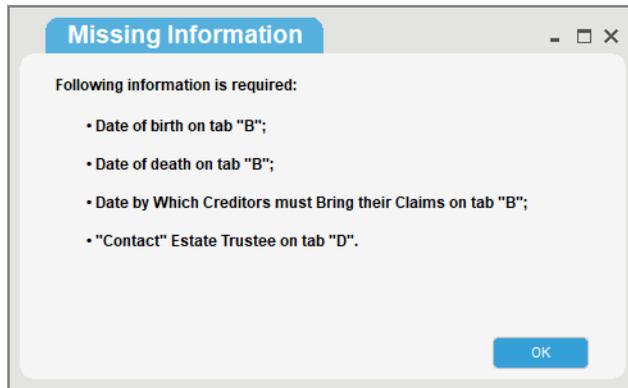
a. Mandatory Fields for Notice to Creditors

The following fields in Tabs B and D must be completed to post a Notice to Creditors:

- Name of Deceased on Tab B
- Date of Death on Tab B
- Jurisdiction on Tab B
- Date by Which Creditors must Bring their Claims on Tab B
- In the **Interested Parties** topic (Tab D), add an Estate Trustee and include the address, jurisdiction, telephone, email address and **Is Contact?** details for this party.

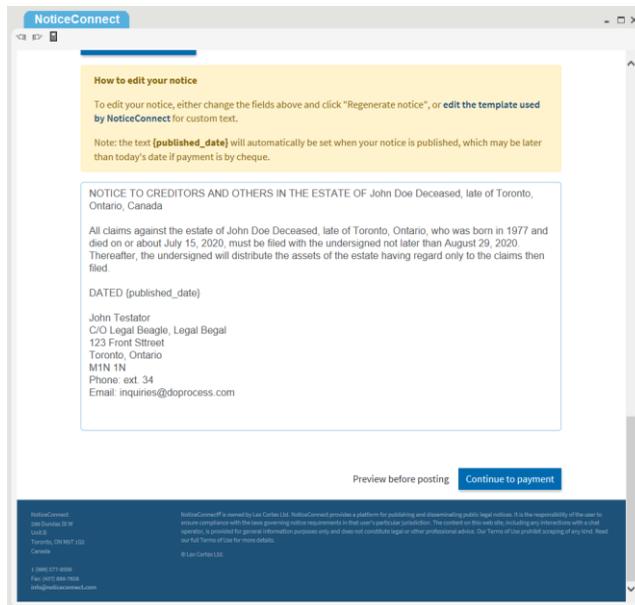
b. Missing Data

Should any of the above information be missing from Tab B, you will be presented with a **Missing information** window which will indicate which fields are missing. Click **OK** and proceed to the appropriate fields to enter the information.



Once you have clicked on the **Create A Notice to Creditors with NoticeConnect®** button you will be presented with the following confirmation screen. You are able to edit the notice from this screen or Continue to Payment if you are satisfied with the data.

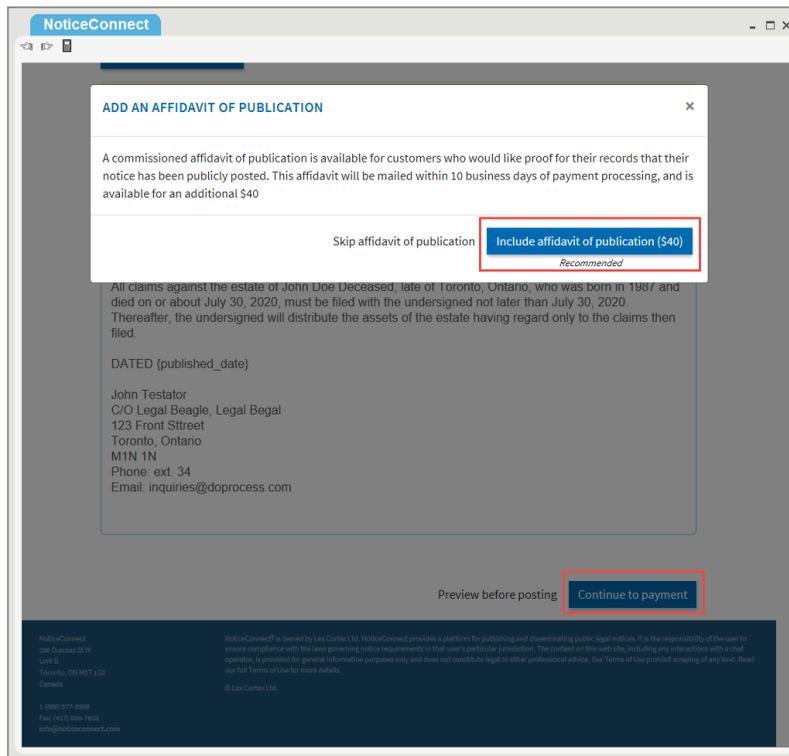
Note: Any changes made to fields in the NoticeConnect window **will not appear** in the Estate-a-Base record.



c. Continue to payment

You will have the option of adding a commissioned affidavit of publication for an extra \$40 before proceeding to checkout. If you select this option, the affidavit will be mailed out by NoticeConnect within 10 business days of your order. Alternatively, you can skip this option and go to checkout.

No matter which option you choose, click on the **Continue to Payment** to proceed.



ADD AN AFFIDAVIT OF PUBLICATION

A commissioned affidavit of publication is available for customers who would like proof for their records that their notice has been publicly posted. This affidavit will be mailed within 10 business days of payment processing, and is available for an additional \$40

Skip affidavit of publication **Include affidavit of publication (\$40)**
Recommended

All claims against the estate of John Doe Deceased, late of Toronto, Ontario, who was born in 1987 and died on or about July 30, 2020, must be filed with the undersigned not later than July 30, 2020. Thereafter, the undersigned will distribute the assets of the estate having regard only to the claims then filed.

DATED (published_date)

John Testator
C/O Legal Beagle, Legal Begal
123 Front Street
Toronto, Ontario
M1N 1N
Phone: ext. 34
Email: inquiries@doprocess.com

Preview before posting **Continue to payment**

NoticeConnect
240 Dundas St W
5th Fl
Toronto, ON M5T 1G2
Canada
1 (800) 377-8029
Tel: (416) 593-7102
info@noticeconnect.com

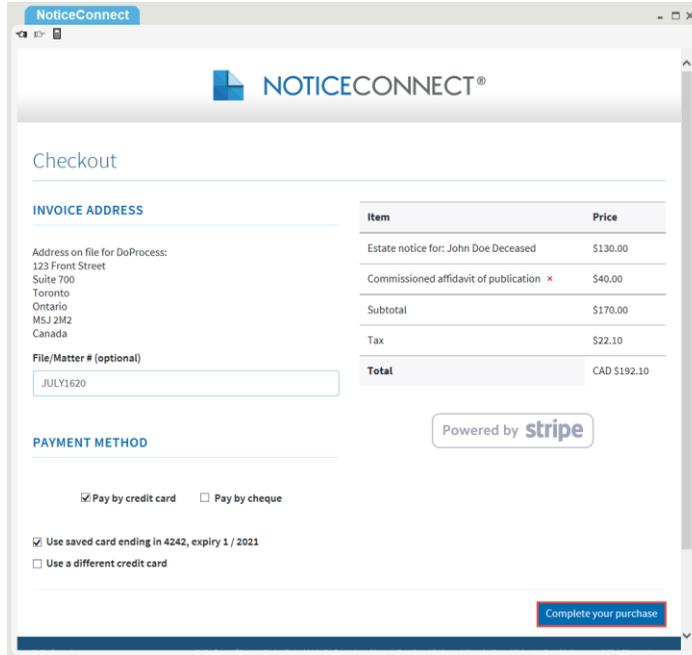
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d. Checkout and Payment Method

In the **Checkout** screen, you will see the charge for the notice and affidavit of publication (if requested). You will also have the option to pay by credit card or by cheque.

If you choose to pay by credit card, you can either use one saved previously or use a different credit card.

If you choose to pay by cheque, your notice will be posted when the payment clears.



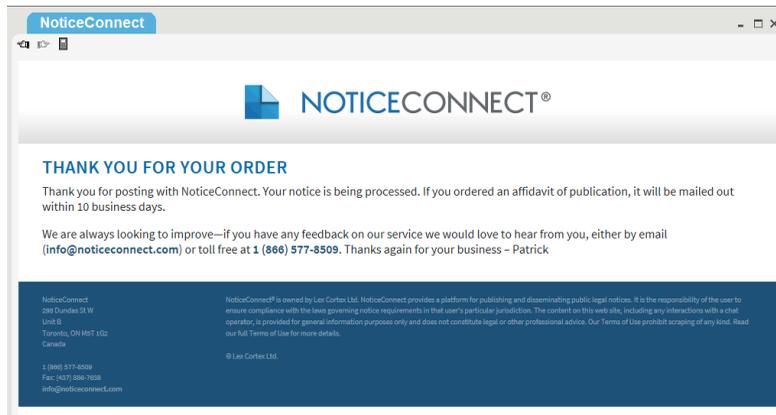
The screenshot shows the NoticeConnect checkout interface. It includes an invoice address, a table of items with prices, a payment method section with radio buttons for credit card and cheque, and a 'Complete your purchase' button.

Item	Price
Estate notice for: John Doe Deceased	\$130.00
Commissioned affidavit of publication *	\$40.00
Subtotal	\$170.00
Tax	\$22.10
Total	CAD \$192.10

e. Complete your purchase

Once you choose the payment method, click **Complete your purchase**. A **Thank you** message appears in the NoticeConnect window. The message varies slightly depending on whether you paid by cheque or credit card.

Credit Card Thank You Message



The screenshot shows the 'THANK YOU FOR YOUR ORDER' message. It includes a thank you note, contact information for feedback, and a footer with company details and a disclaimer.

THANK YOU FOR YOUR ORDER

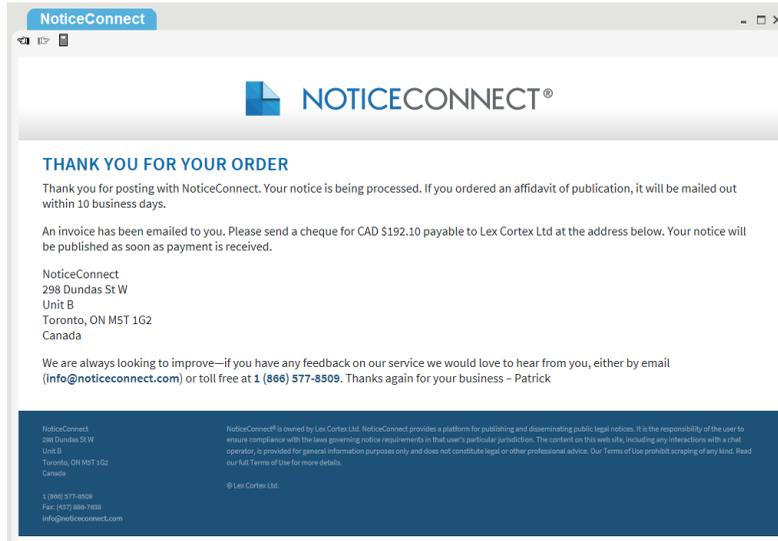
Thank you for posting with NoticeConnect. Your notice is being processed. If you ordered an affidavit of publication, it will be mailed out within 10 business days.

We are always looking to improve—if you have any feedback on our service we would love to hear from you, either by email (info@noticeconnect.com) or toll free at 1 (866) 577-8509. Thanks again for your business - Patrick

NoticeConnect
288 Dundas St W
10th Fl
Toronto, ON M5T 1G2
Canada
1 (866) 577-8509
Fax: (416) 566-7658
info@noticeconnect.com

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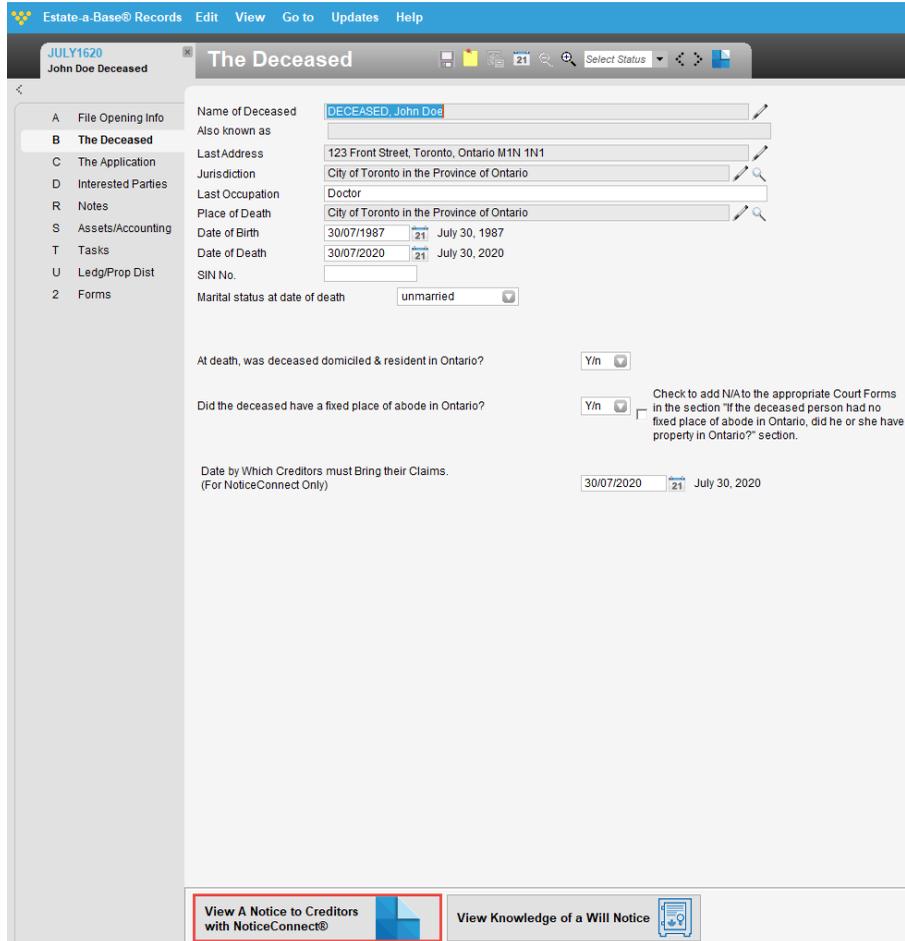
Cheque Thank You Message



NoticeConnect will email a receipt to you (if you paid by credit card) or an invoice (if you paid by cheque). The receipt includes a link to the notice.

f. View your Notice to Creditors

You can view your notice any time by clicking on **View a Notice to Creditors with NoticeConnect®** on Tab B.



Estate-a-Base® Records Edit View Go to Updates Help

JULY1620
John Doe Deceased

The Deceased

Name of Deceased: **DECEASED, John Doe**

Also known as: [Empty]

Last Address: **123 Front Street, Toronto, Ontario M1N 1N1**

Jurisdiction: **City of Toronto in the Province of Ontario**

Last Occupation: **Doctor**

Place of Death: **City of Toronto in the Province of Ontario**

Date of Birth: **30/07/1987** July 30, 1987

Date of Death: **30/07/2020** July 30, 2020

SIN No.: [Empty]

Marital status at date of death: **unmarried**

At death, was deceased domiciled & resident in Ontario? **Y/n**

Did the deceased have a fixed place of abode in Ontario? **Y/n**

Check to add N/A to the appropriate Court Forms in the section "If the deceased person had no fixed place of abode in Ontario, did he or she have property in Ontario?" section.

Date by Which Creditors must Bring their Claims. (For NoticeConnect Only) **30/07/2020** July 30, 2020

View A Notice to Creditors with NoticeConnect®

View Knowledge of a Will Notice

Once the notices are posted (which is immediate for credit card payments), you will be able to see them on the main NoticeConnect web page in the [RECENT NOTICES](#) section.