August 24, 2020

UPGRADE NOTICE

Improved Integration with NoticeConnect®

DoProcess is pleased to announce an improvement to the NoticeConnect integration in Estate-a-Base Version 22.2A. In addition to posting a Notice to Creditors in the application, you can now use the Combined Registry Search.

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 offices, law libraries, and other partners.

For more details and instructions on using this innovative feature, refer to the Quick Reference Guide.

New Document for "Ack & Dir - Notice to Creditors" Task

In a previous release, we provided a new task named "Ack & Dir – Notice to Creditors". We have added a new document for this task. The Executor acknowledges that he/she has instructed the lawyer not to search for a Will in the Canada Will Registry and to proceed without a search. See **Importing Documents** for instructions.

Updated Undertaking Document

The document **undertkg.utg**, an undertaking of Estate Trustees re probate fees, has been updated with the following change to the third paragraph – see **Importing Documents** for instructions:

> I hereby undertake to file a sworn statement of the actual total value of the estate with the Superior Court of Justice at <jurisdiction of court> within six months and I further undertake to pay any additional Estate Administration Tax owing, if any.

Importing Documents

Following are directions for importing the documents nosearch.et and undertkg.utg once you have upgraded to Version 22.2A:

1. Recommended: Make a backup of the existing Master folder (located at **C:\EST8BASE\MASTERS**, where **C** may be replaced by the letter for another drive).

2. Log in as a regular user.

3. Click **Updates > Import selected master documents from DPS_MAST.ZIP**.

4. Double-click **nosearch.et** and **undertkg.utg** > click **Proceed (F2)** > confirm the import.

Continue to the next step for **nosearch.et**, which you must assign to the task.

5. Open a record > add an **Ack & Dir - Notice to Creditor** task > click **0/1 Documents** in the Doc't Prod'n column > in the **Document Production** box, click **Master Documents** > in the next available field of the Master Document Name column, click 🔍 > select **nosearch.et** > enter a description > click **OK**.

6. Generate the document. The next time you open this task the new document will be included.

Updated Court Form

We have continued to make improvements to the Court Forms in Microsoft Word.

Form 74.6 Affidavit of Service of Notice has been updated to support the Attention field and Corporations. Once you upgrade **Estate-a-Base**, this revised form will automatically be available.

Need Help Upgrading?

All users must log out of **Estate-a-Base** before 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.