

PEXA Training Webinar

Completing a Survivorship and Transmission Application

9 October 2018

Trainer: Nichola Baker and Nancy Madafferi

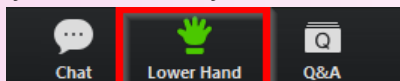
The webinar will commence shortly.



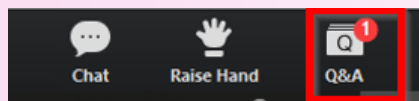
Welcome to our VIC Survivorship and Transmission Zoom Webinar

Due to the number of attendees in this webinar you will remain on mute for the duration of this session

Raise your hand if you can hear me



Use the Q & A if you have a question



Please input your question...

Send Anonymously Send

What's on the program today?

- Complete a Survivorship Application (ASP)
- Complete a Transmission (APR)
- PEXA Community and Help

Important note!

- This webinar assumes you have basic understanding of PEXA, Workspaces and the PEXA Dashboard and focuses on the Proprietor on Title role.
- Due to the large number of registrants, it is important we stick to this topic.

PEXA Survivorship

Important Notes!

Currently, the following scenarios are supported:

- Standalone Survivorship
- Survivorship with Discharge
- Survivorship with Caveat.

Please note:

- If the Survivorship Application is required for a Transfer, you will need to complete a standalone Survivorship Application prior to opening the Transfer Workspace.
- If you have created the Transfer workspace first, remember to complete an **Information Resupply** on the Land Titles screen of the Transfer Workspace once the Survivorship is registered.

NOTE: Joint tenancies comprising an **organisation are currently out of scope**. This functionality will be included in future releases.

Scenario

- We are **Kakadu Property Law**.
 - Margaret and Maxwell Black are the existing Proprietors on Title.
 - Sadly, Maxwell has passed away.
 - Margaret has instructed Kakadu to complete a Survivorship Application to remove Maxwell's name from the title.
 - Margaret has instructed for a paper title to be returned.
-
- **Land Title 90051/950**

Lodge a Survivorship

- 1 Create a Workspace as Proprietor on Title
- 2 Review the Land Title Details
- 3 Represent the surviving party and confirm the deceased party
- 4 Create the Survivorship document
- 5 Create, sign and lodge the Nomination
- 6 Edit the Lodgement instructions and View, Sign and Lodge the documents.

Transmission Applications (APR)

VIC: 90031/950

Important Notes!

Currently, the following scenarios are supported:

- Standalone Transmission
- Transmission with Discharge
- Transmission with Caveat.

Please note:

- If the Transmission Application is required for a Transfer, you will need to complete a standalone Transmission Application prior to opening the Transfer Workspace.
- If you have created the Transfer workspace first, remember to complete an **Information Resupply** on the Transfer Workspace once the Transmission is registered.

Scenario

- We are **Kakadu Property Law**.
 - Archie Thomas and Mia Thomas (tenants in common) are the existing Proprietors on Title.
 - Sadly, Archie has passed away.
 - Eddie Executor has instructed Kakadu to complete a Transmission Application to remove Archie's name from the title.
 - Eddie has instructed for a paper title to be returned.
-
- **Land Title 90031/950**

Lodge a Transmission

- 1 Create a Workspace as Incoming Proprietor
- 2 Review the Land Title Details
- 3 Create the Executor party and confirm the deceased party
- 4 Create the Transmission document
- 5 Add role of CT Controller and create, sign and lodge the Nomination
- 6 View, Sign and Lodge the Transmission document

Help Cards – available at community.pexa.com.au

Survivorship Applications (VIC)

Quick Reference Guide

1. Create a new Workspace


Click **Create New Workspace** and the following details:

- Select your Jurisdiction
- Role = **Proprietor on Title**
- Land Title(s) and **Validate**
- Subscriber Workspace Reference
- Financial Settlement? = **No**
- Request Land Title Data = **Now**
- Workgroup
- Click **Save**.


2. Review Land Titles

- Navigate to the **Land Titles** screen
- Review the land title details returned from the Land Registry.

3. Confirm Deceased Proprietor

- Navigate to the **Participants Screen**
- Locate the Deceased party in the **Proprietor on Title** role
- Use the action cog  to select **Edit Party** to display the Party screen
- Select **The Party is Deceased**
- Click **Save**.

4. Represent Surviving Proprietor

- On the **Participants** screen locate the surviving Proprietor on Title
- Use the action cog  to select **Edit Party** to display the Party screen
- Select **I Represent this Party**
- Complete outstanding details
- Click **Save**.

Note: If there is a mortgage registered on title, you will need to invite in them in as CT Controller.

5. Create Survivorship Document

- Navigate to the **Documents** screen
- Click **Create Document**
- Complete Survivorship Document
- **Note:** If there is more than one Joint Tenancy, select the relevant option from the drop down box
- Click **Save**.

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Transmission Applications (VIC)

Quick Reference Guide

1. Create a new Workspace

Click **Create New Workspace** and the following details:

- Select your Jurisdiction
- Role = **Incoming Proprietor**
- Land Title(s) and **Validate**
- Subscriber Workspace Reference
- Financial Settlement? = **No**
- Request Land Title Data = **Now**
- Workgroup
- Click **Save**.

2. Review Land Titles

- Navigate to the **Land Titles** screen
- Review the land title details returned from the Land Registry.

3. Create Executor/Administrator

- On the **Participants** screen click **Create Party**
- Select **I Represent this Party**
- Complete details including **Party Capacity** and click **Save**.

Note: If there is a mortgage registered on title, you will need to invite in them in as CT Controller.

4. Create Transmission

- Navigate to the **Documents** screen
- Click **Create Document**
- Complete **Transmission Document**
Note: **Primary Deceased** refers to the Proprietor who passed away most recently.
- Click **Save**.

5. Change Roles (if applicable)

If you are in control of the certificate of title, you will need to complete a Nomination

- Navigate to **Workspace Settings**
- Select **Role Settings > Edit**
- Add in the role of **CT Controller** and select **Add Role**
- Click **Save**.

6. Create Nomination

- Navigate to the **Documents** screen
- Click **Create Document** > **Nomination**
 - Where are you authorising this title to be used? = **this PEXA Workspace**
 - Is the title currently paper? **Yes/No**
 - Do you wish to retain eCT control of the title after the transaction?
 - Select **Yes** if you wish to receive an electronic title

Get PEXA Certified

Everything you need to learn to use PEXA is in one place: **PEXA Certified**
By completing this program, you'll join the e-Conveyancing experts.

Your Pathway to PEXA Certification

Getting Business Ready

- › Update your contracts, precedents & client engagement letter
- › Decide how you will manage client VOI
- › Download your Client Authorisation Form
- › Incorporate the PEXA fee into your fee structure
- › Understand your compliance obligations



System Set Up

- › Install and test your Digital Certificate(s)
- › Finalise your Subscriber Profile set up
- › Set up your Trust Account
- › Set up your signing permissions
- › Set up SettleMe



Transacting in PEXA

- › Understand what transactions you can complete with PEXA
- › Complete transactions without Financial Settlement eg. Caveats
- › Understand the Transfer Guidelines
- › Understand the differences between transacting in PEXA vs. paper
- › Learn and complete transfer transactions



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