


Create a new Workspace

Click  and the following details:

- Select your Jurisdiction = **NSW**
- Role = **Incoming Proprietor**
- Land Title(s) and **Validate**
- Subscriber Workspace Reference
- Financial Settlement? = **Yes**
- Transfer? = **Yes**
- Request Land Title Data = **Now**
- Workgroup
- Click .


Review Land Titles

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

Mark Proprietor as Deceased


- Navigate to the **Participants** screen
- Locate the deceased proprietor/s
- For each deceased proprietor, select

 > **Edit Party**

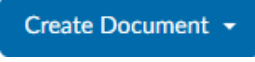

- Select **The Proprietor is Deceased** and enter **Details of Death**.
- Click .

Create Beneficiary



- On the **Participants** screen click **Create Party**
- Select **I Represent this Party**

- Complete details including **Party Capacity** and click .

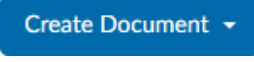

Create Transmission Direct to Beneficiary

- Navigate to the **Documents** screen
- Click  > **Transmission Direct to Beneficiary**
- Complete Applicant and Tenancy Details
- Complete Grantee Details (e.g. Executor/Administrator)
- Confirm you hold written consent from the Executor/Administrator
- **Note: Primary Deceased** refers to the Proprietor who passed away most recently
- Enter the **Evidence Details**
- Click .

Edit Notice of Sale

- Click  > **Edit the Notice of Sale**.
- Complete the outstanding details and click .

Create CoRD Consent

- Click  > **Consent**
- Complete the details and click .



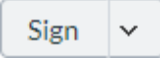
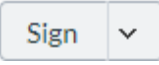
Note: If there is a mortgage registered on title, you will need to invite in the **Consentor** to complete the **Consent**. This is completed via the **Participants** screen.

Complete Stamp Duty Assessment

- Navigate to **Stamp Duty** screen
- Note the Lodgement Case ID
- Assess Stamp Duty in EDR and obtain Duties Assessment Number (DAN)
- Once assessed, navigate to the Stamp Duty screen in PEXA and select **Enter Duty**

Information > enter the DAN and click .




Edit Lodgement Instructions, View and Sign all documents

- Click  > Lodgement Instructions > **Edit**
- Review and complete any outstanding details and click 
- Click down arrow  > **Transmission, Notice of Sale, Consent** > **View**
- Click  > **Transmission** > **Sign**

Financial Settlement

- Navigate to the Settlement Screen
- Add Destination and Source line items as applicable

For Source Funds:

- Click  > **Verify Funds**
- Click  > **Authorise Funds** to authorise the Trust Account payment
- Click  > **Sign** > **Financial Settlement Schedule.**

Monitor the Workspace

Check that:

- All documents are signed, and lodgement verification is successful
- Financial settlement is correct and balanced and signed.
- Review your Workspace and monitor any changes to the Workspace via the Workspace Summary screen.

Note: The Workspace must be in a **Ready** status for settlement to commence

For more information visit:
community.pexa.com.au