



# **Online Submission Tool: Alternate Authority**

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## Revision History

Version #	Revision Date	Summary of Changes	Pages Changed

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## **Overview**

This module will provide you with information to add or remove an alternate authority from a title or interest using the Online Submission Tool. You will also learn some of the features located under the Transfer tab.

## ***Objectives***

As a result of this module you will:

- Be able to complete an application for alternate authority for one client.
- Be able to upload authorizations and attachments and link them to applications.

## **What Is an Alternate Authority?**

An alternate authority may be identified for a title owner or interest holder who is a child, dependent adult, person with property co-decision maker, or a company in liquidation. This application may be used for either adding or removing an alternate authority. An application for alternate authority must be completed for each existing client number.

## ***Adding or Removing an Alternate Authority – The Basics***

The following provides a brief high-level description of the steps needed to add or remove an alternate authority. For detailed instructions, refer to the step-by-step instructions.

1. Create a new packet or select an existing packet
  - You may choose to add this transaction to an existing packet or create a new packet for the transaction.
2. Create new or select existing transaction
  - Select transaction type and click **Create** or **Select** from an existing transaction.
3. Enter the client number and select add or remove alternate
  - You must know the client number of the entity for which you are adding the alternate authority to or removing the alternate authority from.
  - Adding and removing alternates require separate applications.
4. Complete alternate authority details
  - Add or remove alternate authority as required.
  - Select titles(s) or interests(s).
  - Identify alternate authority to add or remove.

5. Request a title print (optional)
  - Use the **Request Title Print** function if you want to order a copy of the Title as it will appear once the transaction is registered.
  
6. Add authorizations and attachments
  - The **Manage Authorization & Attachments** area will allow you to link the necessary supporting documentation to the transaction.
  
7. Save and validate application, create summary report, and submit the packet
  - Once you are satisfied the transaction you have created is complete, it is time to validate the transaction. If all transactions in the packet have been completed and successfully validated, you are ready to create a summary report and submit the packet.

**Note:** A summary report must be created after validation and prior to submitting the packet.

**Note:** You should save your work as you go through your application.

## Step-By-Step Reference

The following provides detailed instructions that will guide you through successfully submitting your alternate authority transaction.

### Step 1: Create a New Packet or Select an Existing Packet

You may create a new packet or you may include the alternate authority in an existing packet.

The screenshot shows a window titled "Select or Create Packet" with a "Hide this section" link in the top right. Below the title bar, there are two radio buttons: "Create in a New Packet" and "Add to Existing Packet".

1. Select the **Create in a New Packet** or **Add to Existing Packet** radio button. The system will open the **Select or Create Packet** screen.

The screenshot shows the "Select or Create Packet" window with the "Create in a New Packet" radio button selected. The main area is titled "Packet Header Info" and is divided into two sections: "Packet Information" and "Account Information".

**Packet Information**

Submitting Party: Train50 10 Research Dr, Regina, Saskatchewan, Canada

Client No: 400031930 Find Packet Type: Title Processing

Client Ref. No: Packet No:

Packet Description:

**Account Information**

Account Number: 300001082

New Account Password: \*\*\*\*\*

At the bottom, there are three buttons: "Save", "Continue", and "Clear". The "Add to Existing Packet" radio button is also visible at the bottom left.

2. If the packet is to be submitted under a different client number, enter the new **Client No:** and click the **Find** link. The system will display the Name and Address of the new submitting party.
3. The account information can be changed if this packet is to be charged to a different account. Enter the **Account Number** and **Account Password** for that account.
4. Enter an optional **Packet Description** to help you identify the packet in the **Packets List**.

5. Click **Save** or **Continue**. The system will generate a packet number and refresh the screen allowing you to carry on with the transaction.

**Note:** If you entered a client reference during login, it is carried forward to this field. You can change or remove it if required. This number is for your information and is another way to distinguish this packet from others. The Client Ref. No. will appear on your ISC invoice for this packet.

**Note:** To continue working on an existing packet, select the **Add to Existing Packet** radio button. See the OLS Common Elements module for details on using this option.

## Step 2: Create New or Select Existing Transaction

At this point, the system allows you to create an alternate authority transaction or select an existing transaction to continue working on a previously created transaction.

Select or Create Transaction for Packet 200080370 Hide this section

**New Transfer Transaction:**

**Transaction Type**  Title Transfer  Transfer to Surviving Joint Tenant  Transmission  
 Mineral Commodity Split  Alternate Authority

**Select Existing Transfer Transaction:**

1. To create a new transaction, select the **Alternate Authority** radio button and click **Create**. The system will open the **Select Alternate Items** screen.

**Note:** To continue working on an existing transaction, select the transaction from the **Select Existing Interest Transaction** drop down and click **Select**. The system will open the **Select Alternate Items** screen.

### Step 3: Enter the Client Number and Select Add or Remove Alternate

New Alternate Authority Hide all sections ▾

Alternate Authority Description

Select Alternate Items Hide this section ▾

Client Number:  ⓘ

\* You can only Add or Remove Alternates in a single application. To do both, create a separate application for each.

1. Enter an optional **Alternate Authority Description**. This description will be used to identify this transaction in this packet.
2. Enter the title owner's or interest holder's client number in the **Client Number** field.
3. Click **Add Alternate** or **Remove Alternate**. The **Add Alternates** screen or the **Remove Alternates** screen will appear with a list of the client's titles and/or interests.

## Step 4: Complete Alternate Authority Details

Adding and removing alternates require separate applications.

### *Adding an Alternate Authority*

The image shows two screenshots of a web application. The top screenshot is titled 'Add Alternates' and shows a 'Titles for: Kasdorf, Justin' section with a 'Select All' button and a 'Print List' button. Below this is a table with two columns: 'Title No.' and 'View Parcel Information'. The first row contains the values '200021713' and '100888195' respectively, with a checkbox to its left. Below the table is an 'Interests for:' section with a table with four columns: 'Interest No.', 'Interest Register No.', 'Interest Type', and 'View Title Information'. At the bottom of this section is an 'Alternate Type:' dropdown menu set to 'Not Applicable'. The bottom screenshot is titled 'New Alternates' and shows an 'Alternate: 1' section. It features a large empty box with the text 'No client selected' and a 'Selection Change Options' panel on the right. This panel includes buttons for 'Create New', 'Select from Packet', and 'Search for Client', each with a help icon. Below these is a 'Quick Selection by Client Number' section with a 'Client Number:' input field and a 'Quick Add' button. A 'Delete Alternate' button is located at the bottom right of the 'New Alternates' section.

1. Click the check box to the left of the title(s) or interest(s) you wish to add the alternate authority to.
2. Select the Alternate Type from the drop down.
3. Specify the alternate authority.

**Note:** If there is more than one alternate authority, click **Add Alternate**.

## ***Removing an Alternate Authority***

Remove Alternates Hide this section ▾

**Titles for:** Smith, Carlee Anna

Select All Print List

Title No.	View Parcel Information	Existing Alternates
200002600	100873593	<input type="checkbox"/> Public Trustee

**Interests for:**

Interest No.	Interest Register No.	Interest Type	View Title Information	Existing Alternates
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1. Click the check box to the left of the existing alternate(s) you wish to remove.

### **Step 5: Request a Title Print (optional)**

If you request title prints for this transaction, you will receive and be charged for each title print for every title affected by the interest register number. See the OLS **Common Elements** module for details on completing this step.

### **Step 6: Add Authorizations and Attachments**

Authorizations and attachments are documents that form part of the packet and are added to the packet prior to submission. The OLS tool has the ability to upload documents as well as store and retrieve documents for future use.

See the OLS **Common Elements** module for details on completing this step.

## Step 7: Save and Validate Application, Create Summary Report, and Submit Packet

### *Validate Application*

You should **Validate** your application when you are satisfied that all required elements are correct. If errors are encountered during the validation, a pop-up message box will be displayed and the screen will be repositioned to the **Validation Errors** section.

**Note:** If you have multiple applications in your packet, validate each application prior to submitting the packet.

Each transaction type has a specific number of applications that will determine whether a packet will be validated online. Generally, application validation will take a couple of minutes, however it could take longer for packets with a very large number of applications, setups, or interests affecting a large number of titles.

**Note:** If you exceed the maximum number of applications within your packet or if your transaction contains more than the system allotted attached items, validation will take place off-line. The maximum number of items in an OLS application group before validation is done offline is:

<i>Application Type</i>	<i>Maximum</i>	<i>Item Type</i>
Title Transfer	15	Applications
Transform	100	Applications
Interest Registration	100	Interests
Interest Discharge	15	Interests
Transmission	15	Titles
Surviving Joint Tenant	15	Titles
Alternate Authority	15	Titles/Interests
Commodity Split	100	Applications
Interest Assignment	100	New Shares
Interest Amendment	100	New Interests
Judgment Registration	101	Interests

When offline, the OLS system performs an automated check of the assembly of each application within the packet to ensure that all requirements of ISC's business rules are met. Once the offline validation has been completed, notification of a successful or of a failure of offline validation will be sent to the user's notifications field on the OLS homepage and the packet will be returned to "Draft" status.

Generally, the validation process will take a couple of minutes, however it could take longer for transactions with a very large number of applications, setups or interests affecting a large number of titles. The packet status will change to "Being Validated" while validation is being performed. You will not be able to open or work on the packet until the offline validation has completed.

### ***Create Summary Report***

For this application, create the summary report from within this application. For a multi-application packet, click **View Packet Content** to create the full summary report for all applications within the packet.

### ***Submit Packet***



1. Click **Submit Packet**. The system will display the following confirmation screen. This page contains information from the packet header and an estimate of the fees for this packet.

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This packet will be submitted for data validation. You will be notified on the OLS Home page if there are any validation errors, otherwise the packet will be submitted to the queue for processing.

**Packet Header Info**

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Packet Information		Account Information
Submitting Party: Train50	10 Research Dr, Regina, Saskatchewan, Canada	Account Number: <input type="text" value="800001082"/>
Client No: 400031930	Packet Type: Title Processing	
Client Ref. No:	Packet No: 200080268	
Packet Description:		
Status: Draft	Expiry Date: 11-Jan-2013	

**Packet Confirmation Date:**  
This information is being provided for information purposes only. The date may not reflect the actual date of submission, because submission does not occur until you have continued submission of this packet by clicking on the  button.

Confirmation Date: Thursday, July 12, 2012 2:13:06 PM

**Estimated Fees:**  
(Note - Final cost will be determined at registration, this is an estimate only.)

Total estimated fees for the packet are: \$50.00

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Continue submission of this packet?

2. Once you have verified the accuracy of the information, click **OK** to submit the packet. The system takes you to the **All Packets** view of the Packet Management tab. The packet status will change from "Draft" to "Pending Submit."

**Note:** If you need a copy of this confirmation report, you may print it from here.

**Note:** Clicking **Cancel** only cancels submission of the packet.

## Notables

- Adding and removing alternates require separate applications.
- If there is more than one alternate authority, click **Add Alternate**.
- A summary report must be created after validation and prior to submitting the packet.