BC OnLine

Wills Registry System
User's Guide

**Last Updated
August 3, 2017**

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Typographic Conventions

Typographic conventions are used with the following meanings:

Screen names and field names are capitalized. For example:
In the Transaction screen, move to the Search field.

Buttons and other "clickable" items appear in bold. For example:
Click **Submit**.

Required input (that you enter exactly as shown) appears in Courier font. For example:
Type: `BC OnLine`

Variable input (that you provide) appears in italic Courier font. For example:
Type your `Password`

System messages (and other screen output) appear in bold Courier font. For example:
PASSWORD CHANGE COMPLETED

Tips, Notes, Important Notes, Cautions, and Warnings appear as shown below:

Tip
A way to make your work easier.

Note
Further information about the current subject.

Important
An emphatic note about the current subject.

Caution
An important point that could prevent an inconvenience.

Warning
An important point that could prevent a financial loss, or loss of data.

Folio Tag

The Folio Tag is a 15-character field on each BC OnLine search screen. You can enter a name, number, or alphanumeric to "tag" each search you do. This tag will be printed on your BC OnLine statement. If you pass the cost of BC OnLine searches to your clients, or if your firm has multiple cost centres using the same BC OnLine account, this may help you with your office accounting.

There is no charge for using the Folio Tag. If you don't use it, the folio field on the statement will be blank.

To use the Folio tag, click the Folio field in the upper left-hand corner of the search screen, before you start a search. Type any combination of numbers or letters (up to 15).

When you do multiple transactions using the same folio tag, your statement will group these under each tag you used.

Note
The Folio field will hold the tag you type there until you either change it or delete it. The field does not clear after every search. You must type over the previous folio tag or use the space bar to blank it out each time you begin doing work for a different client. The Folio field is always blank each time you sign on to BC OnLine.

If you don't need to use folio tags, just leave the Folio field blank.

Wills Registry System Overview

The Wills Registry System lets you submit service requests to the British Columbia Vital Statistics Agency. The requests you fill in through BC OnLine replace the paper *Wills Notice* form and Application for *Search of Wills Notice* form.

Vital Statistics Agency personnel will process your online request exactly as though you had submitted a paper form over the counter. The result of your submission will be mailed to you within twenty business days.

> **Tip**
> The search and registration services are intended for the exclusive use of solicitors and notaries only. Title Search companies approved by the Vital Statistics Agency may also be granted access to Wills Registry.

Using this system, you can submit two kinds of request:

- Submitting a Will Registration Request (see page 4).
- Submitting a Will Search Request (see page 14).

Submitting a Will Registration Request

When you select **Vital Statistics** from the BC OnLine main menu, you will go to the Vital Statistics menu, which contains both Registration and Search options.

To submit a will registration request, click the **Wills Notice Registration** button, then click **Submit** to go to the Wills Registration Process screen.

The Wills Registration Process screen is similar to the paper *Wills Notice* form. The system fills in the Client Information fields at the top of the screen with information kept on file at BC OnLine.

The fee for filing a will registration (subject to change without notice) is displayed in the **CURRENT FEE** field in the middle of the screen. You can update any other fields on this screen.

Completing the Registration Process Screen

The name and address information associated with the Client Name identifies you as the person who is registering the will.

The information just below the Notice Date identifies the person whose will you are registering. You will complete the name, sex, birth date, birth city, birth province, and birth country for this person. Please see Province and State Abbreviations on page 17.

The Action areas allow you to perform *one* of the following functions for each transaction:
1. Execute a Will (see page 6)
2. Revoke a Will (see page 7)
3. Change a Will's Location (see page 8)

For details of each field, please see Registration Input Fields on page 9.

Execute a Will

- Click **Execute** in Action 1 and **Blank** in Action 2.
- Complete the date, name, and address fields in Section 1 with information about the will to be executed.
- Leave the fields in Section 2 blank.

Complete the screen, then click **Submit** to process the request. The system will check for errors, then display the screen for your review. In the review screen, all of the fields are "locked" (they cannot be edited). If you notice an error, click **Redo** to unlock the fields and make your edits, then click **Submit** to re-submit the corrected request. If the system finds an error, it displays a dialog message so you can make the required correction.

Tip

We recommend that you use your browser's Print button to print the review screen for future reference.

When the information on the review screen is correct, click **Submit** again to confirm the request. The applicable fees will be deducted from your BC OnLine account.

Within twenty business days you will receive a **Wills Notice - Receipt Acknowledgement** in the mail, confirming details of the will you registered.

You can click the **Redo** button in the BC OnLine button bar to return to edit mode and make any necessary edits.

Note

During initial data entry (before you click **Submit**), you can use the **Reset** button to clear all of the input fields.

Revoke a Will

- Click **Revoke** in Action 1 and **Blank** in Action 2.
- Complete the date, name, and address fields in Section 1 with information about the will to be revoked.
- Leave the fields in Section 2 blank.

Complete the screen, then click **Submit** to process the request. The system will check for errors, then display the screen for your review. In the review screen, all of the fields are "locked" (they cannot be edited). If you notice an error, click **Redo** to unlock the fields and make your edits, then click **Submit** to re-submit the corrected request. If the system finds an error, it displays a dialog message so you can make the required correction.

Tip

We recommend that you use your browser's Print button to print the review screen for future reference.

When the information on the review screen is correct, click **Submit** again to confirm the request. The applicable fees will be deducted from your BC OnLine account.

Within twenty business days you will receive a **Wills Notice - Receipt Acknowledgement** in the mail, confirming details of the will you revoked.

You can click the **Redo** button in the BC OnLine button bar to return to edit mode and make any necessary edits.

Note

During initial data entry (before you click **Submit**), you can use the **Reset** button to clear all of the input fields.

Change a Will's Location

- Click **Change From** in Action 1 and **Change To** in Action 2.
- Complete the date, name, and address fields in Section 1 with information regarding the **current** location of the will.
- Complete the date, name, and address fields in Section 2 with information regarding the **new** location of the will.

Complete the screen, then click **Submit** to process the request. The system will check for errors, then display the screen for your review. In the review screen, all of the fields are "locked" (they cannot be edited). If you notice an error, click **Redo** to unlock the fields and make your edits, then click **Submit** to re-submit the corrected request. If the system finds an error, it displays a dialog message so you can make the required correction.

Tip
We recommend that you use your browser's Print button to print the review screen for future reference.

When the information on the review screen is correct, click **Submit** again to confirm the request. The applicable fees will be deducted from your BC OnLine account.

Within twenty business days you will receive a **Wills Notice - Receipt Acknowledgement** in the mail, confirming details of the will's new location.

You can click the **Redo** button in the BC OnLine button bar to return to edit mode and make any necessary edits.

Note
During initial data entry (before you click **Submit**), you can use the **Reset** button to clear all of the input fields.

Registration Input Fields

`Client Name` (required)
Your BC OnLine account name. You may change this to something more appropriate if you wish.

`Street` (required)
The first line of your address as recorded by BC OnLine. You may change this to something more appropriate if you wish.

`City` (required)
Your city as recorded by BC OnLine. You may change this to something more appropriate if you wish.

`Province` (required)
Your province as recorded by BC OnLine. You may change this to something more appropriate if you wish. Please see Province and State Abbreviations on page 17.

`Country` (required)
Your country as recorded by BC OnLine. You may change this to something more appropriate if you wish.

`Postal Code` (required)
Your postal code as recorded by BC OnLine. You may change this to something more appropriate if you wish. For Canadian addresses, use the format *ananan* without a space or dash (e.g., `V8X4S8`).

`Work No.` (optional)
Your telephone number as recorded by BC OnLine. This must be numeric, in the format *nnnnnnnnnn* without spaces or dashes (e.g., `2501234567`).

`Fax No.` (optional)
Your fax number as recorded by BC OnLine. This field must be numeric, in the format *nnnnnnnnnn* without spaces or dashes (e.g., `2502345678`).

`File Reference` (optional)
You can use this field to specify a file reference identifying this wills notice for your office's filing system. Both numbers and names are permitted (e.g., `#97-123-DEAU`)

`Notice Date` (required)
This field is automatically set to the current date. This is the date of the completion of this will registration, in the format *dd mmm yyyy* (e.g., `24 JAN 1997`). These three date fields automatically default to the current date, but you can overwrite with a prior date if necessary.

> **Note**
> If this date is more than six months old, the system will generate a warning message before accepting the registration.

`Given Name` (required)
All given names of the person whose will is being registered.

`Last Name` (required)
The last name of the person whose will is being registered.

`Birth Date` (required)
The birth date of the person whose will is being registered, in the format *dd mmm yyyy* (e.g., `15 MAR 1932`).

Note

If the birth date indicates that the person whose will is being registered is less than 16 years old, or more than 90 years old the system will generate a warning message before accepting the registration.

`Sex` (required)
The gender of the person whose will is being registered. Click either **Male** or **Female**.

`Type` (required)
Click the **W** button if the document being registered is a will, or the **C** button if it is a codicil.

`City` (required)
The city where the person was born.

`Province` (required if the person was born in Canada or United States, leave blank if the person was born elsewhere)
The province or state where the person was born. Please see Province and State Abbreviations on page 17.

`Country` (required)
The country where the person was born.

Action Fields

Action 1 (required)
Click **Execute** to execute an initial filing, **Change** to change the location of an existing will, or **Revoke** to revoke an existing will. See Section 1 on page 12 for details.

Action 2 (required if Action 1 is Change, optional if Action 1 is Execute)
Click **Change** to change the location of an existing will, or **Revoke** to revoke an existing will. See Section 2 on page 13 for details.

Section 1

Date (required)

The date the will was executed. This date must be in the format *dd mmm yyyy* (e.g., 24 JAN 1996).

> **Note**
>
> If this date is more than six months old, the system will generate a warning message before accepting the registration.

Name of Place (required)

The name of the firm, institution, trust company, etc. that holds the will.

Street (required)

The street address of the firm listed in the Section 1 Name field above.

City (required)

The city where the firm in the Section 1 Name field is located.

Prov (required)

The province where the firm in the Section 1 Name field is located. Please see Province and State Abbreviations on page 17.

Country (required)

The country where the firm in the Section 1 Name field is located.

Code (required)

The postal code of the firm listed in the Section 1 Name field. For Canadian addresses, use the format *ananan* without a space or dash (e.g., V8X4S8).

Section 2

Complete the following fields if you are requesting a change of location. Section 2 will state the new location of the will.

`Date` (required if Action 1 is Change From)
The date the will was executed.

`Name` (required if Action 1 is Change From)
The name of the firm, institution, trust company, etc. that holds the will.

`Street` (required if Action 1 is Change From)
The street address of the firm in the Section 2 Name field.

`Code` (required if Action 1 is Change From)
The postal code of the firm in the Section 2 Name field.

`City` (required if Action 1 is Change From)
The city where the firm in the Section 2 Name field is located.

`Province` (required if Action 1 is Change From)
The province where the firm in the Section 2 Name field is located. Please see Province and State Abbreviations on page 17.

`Country` (required if Action 1 is Change From)
The country where the firm in the Section 2 Name field is located.

Submitting a Will Search Request

When you select **Vital Statistics** from the BC OnLine main menu, you will go to the Vital Statistics menu, which contains both Registration and Search options.

To search for a will registration, click the **Wills Registry Search** button, then click **Submit** to go to the Wills Search Process screen.

The Wills Search Process screen is similar to the paper *Application for Search of Wills Notice* form. The system fills in the Client Information fields at the top of the screen with information kept on file at BC OnLine.

Please note that there is an additional charge (subject to change without notice) for searching an alias to the current surname. The charges for searching the current name and for searching each alias are displayed at the right of the screen.

Completing the Search Process Screen

The name and address information associated with the Client First Name identifies you as the requester of the search. This information must be completed correctly so the results can be mailed back to you without delay.

The death date, deceased birth date and current surname and given name information identify the deceased whose will you are searching. Completing this information correctly will allow Ministry personnel to quickly locate the wills notice in question.

If you believe the deceased may have a will registered under another name (such as a maiden name or a change of name) you can complete up to three alias names. There is an additional fee for each alias name you complete.

For details of each field, please see Explanation of Search Input Fields on page 15.

Complete the screen, then click **Submit** to process the request. The system will check for errors, then display the screen for your review. In the review screen, all of the fields are "locked" (they cannot be edited).

Tip
We recommend that you use your browser's Print button to print the review screen for future reference.

If the system finds an error, it displays a dialog message so you can make the required correction. To correct an error, click **Redo** to unlock the fields and make your edits, then click **Submit** to re-submit the corrected request.

When the information on the review screen is correct, click **Submit** again to confirm the request. The applicable fees will be deducted from your BC OnLine account.

Within twenty business days you will receive a **Wills Search Result Confirmation** in the mail, confirming details of the search.

Explanation of Search Input Fields

`Client Name` (required) Your BC OnLine account name. You may change this to something more appropriate if you wish.

`Role` (required)
Click the **S** button for Solicitor or the **N** button for Notary.

`Street` (required)
The first line of your address as recorded by BC OnLine. You may change this to something more appropriate if you wish.

`City` (required)
Your city as recorded by BC OnLine. You may change this to something more appropriate if you wish.

`Prov` (required)
Your province as recorded by BC OnLine. You may change this to something more appropriate if you wish. Please see Province and State Abbreviations on page 17.

`Country` (required)
Your country as recorded by BC OnLine. You may change this to something more appropriate if you wish.

`Postal Code` (required)
Your postal code as recorded by BC OnLine. You may change this to something more appropriate if you wish. For Canadian addresses, use the format *ananan* without a space or dash (e.g., V8X4S8).

`Work No.` (optional)
Your telephone number as recorded by BC OnLine. This must be numeric, in the format *nnnnnnnnnn* without spaces or dashes (e.g., 2503874750).

`Fax No.` (optional)
Your fax number as recorded by BC OnLine. This field must be numeric, in the format *nnnnnnnnnn* without spaces or dashes (e.g., 2503874750).

`File Reference` (optional)
You can use this field to specify a file reference identifying this wills notice for your office's filing system. Both numbers and names are permitted (e.g., #97-123-DEAU)

`Living Will Search` (optional)
If the search is for a person who is deceased, leave the **No** button clicked and complete the Death Date, City, Province, and Country fields. If the search is for a person who is still alive, click the **Yes** button and do not complete the death information.

`Death Date` (required if Living Will Search is No, or leave blank if Living Will Search is Yes)
The date the person was deceased, in the format *dd mmm yyyy* (e.g., 26 JAN 1996).

`City` (required if Living Will Search is No, or leave blank if Living Will Search is Yes)
The city where the death occurred.

Province (required if Living Will Search is No, or leave blank if Living Will Search is Yes)
The province where the death occurred. Please see Province and State Abbreviations on page 17.

Country (required if Living Will Search is No, or leave blank if Living Will Search is Yes)
The country where the death occurred.

Deceased Birth Date (required)
The birth date of the deceased, in the format *dd mmm yyyy* (e.g., 15 MAR 1932)

City (required)
The city where the birth certificate was issued.

Prov (required if the person was born in Canada or United States, leave blank if the person was born elsewhere)
The province or state where the person was born. Please see Province and State Abbreviations on page 17.

Country (required)
The country where the birth certificate was issued.

Name and Alias Fields

Current Surname (required)
The surname of the deceased.

Given Name (required)
All given names of the deceased.

The Search Process screen allows for up to three aliases for the current surname. For each alias surname and alias given name you complete, there is an additional search fee which displays to the far right. The Alias fields are optional.

Tip
You must complete the Current Surname and Given Name fields before completing any Alias names. When completing Alias names, include all legal names this person used (e.g., maiden names, married names, etc.).

Province and State Abbreviations

Canada

Alberta	AB
British Columbia	BC
Manitoba	MB
New Brunswick	NB
Newfoundland and Labrador	NL
Northwest Territories	NT
Nova Scotia	NS
Nunavut	NU
Ontario	ON
Prince Edward Island	PE
Québec	QC
Saskatchewan	SK
Yukon Territory	YT
Unknown Canadian Province	UP

United States

Alabama	AL		Montana	MT
Alaska	AK		Nebraska	NE
Arizona	AZ		Nevada	NV
Arkansas	AR		New Hampshire	NH
California	CA		New Jersey	NJ
Colorado	CO		New Mexico	NM
Delaware	DE		North Carolina	NC
District of Columbia	DC		North Dakota	ND
Florida	FL		Ohio	OH
Georgia	GA		Oklahoma	OK
Hawaii	HI		Oregon	OR
Idaho	ID		Pennsylvania	PA
Illinois	IL		Rhode Island	RI
Indiana	IN		South Carolina	SC
Iowa	IA		South Dakota	SD
Kansas	KS		Tennessee	TN
Kentucky	KY		Texas	TX
Louisiana	LA		Utah	UT
Maine	ME		Vermont	VT
Maryland	MD		Virginia	VA
Massachusetts	MA		Washington	WA
Michigan	MI		West Virginia	WV
Minnesota	MN		Wisconsin	WI
Mississippi	MS		Wyoming	WY
Missouri	MO		Unknown U.S. State	US

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