

Deeds Manual

This manual is designed to help you and your team understand the deeds system in OnePractice.



Table of Contents

Set Up	1
Deed Types and Statuses	1
Deed Packet Numbers.....	2
Deed Attachment Storage.....	4
Entering Deeds	6
Attaching a Document to a Deed	7
Changing a Deed Type	10
Transferring Deeds	11
Packet Transfer	11
Client Transfer	13
Changing a Deed Status	15
To Terminate a Deed	16
To Delete a Deed	19
Deed Reports	20

Set Up

Deed Types and Statuses

To set up the deed system in OnePractice, first set up Deed Types in the Administration tab (see Figure 1 below).

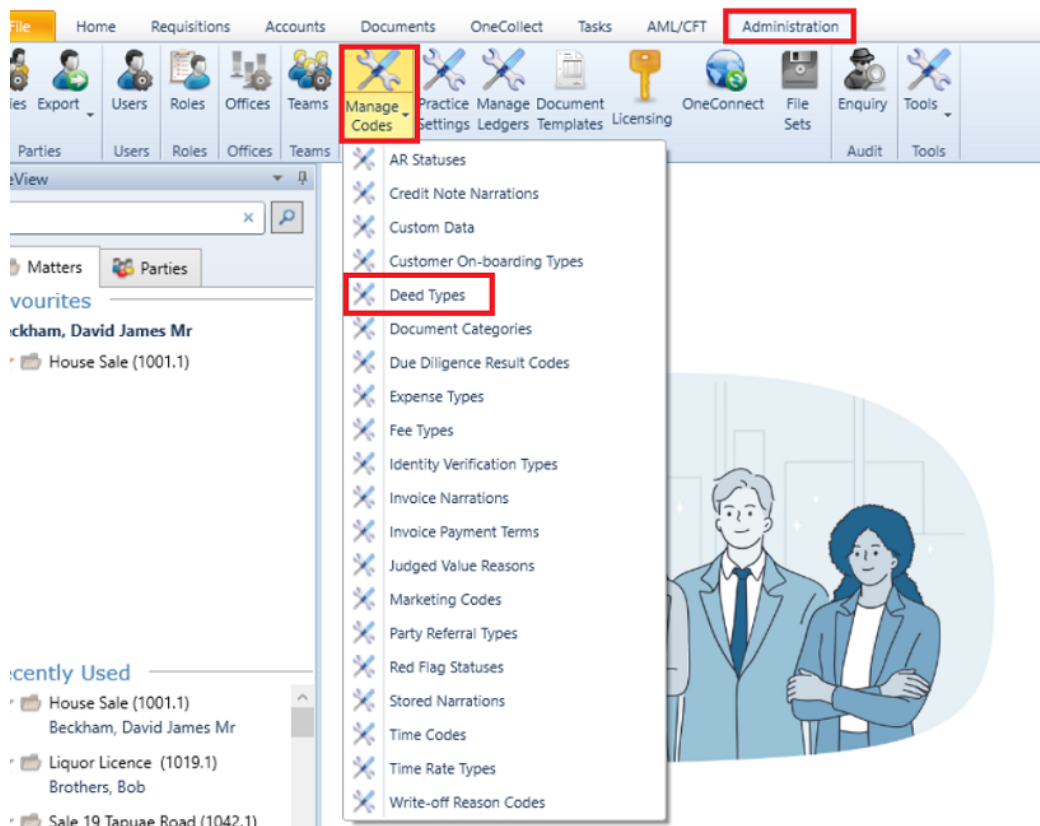


Figure 1.

Click the green plus to add in Deed Types and names (see Figure 2 below).

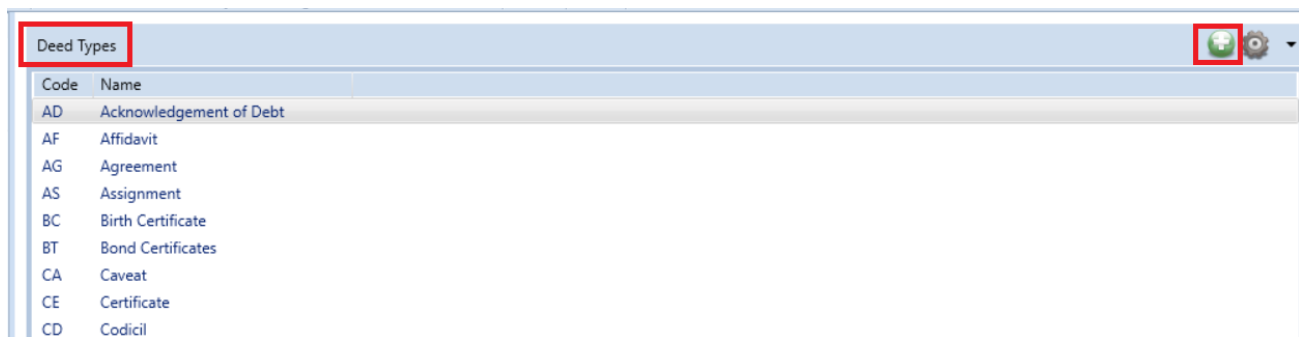


Figure 2.

Scroll down and click the green plus to add a Deed Status (see Figure 3 below).



Figure 3.

Deed Packet Numbers

To set the Deed packet number generation select Practice Settings from the Administration tab and click the grey cog as shown in Figure 4 below.

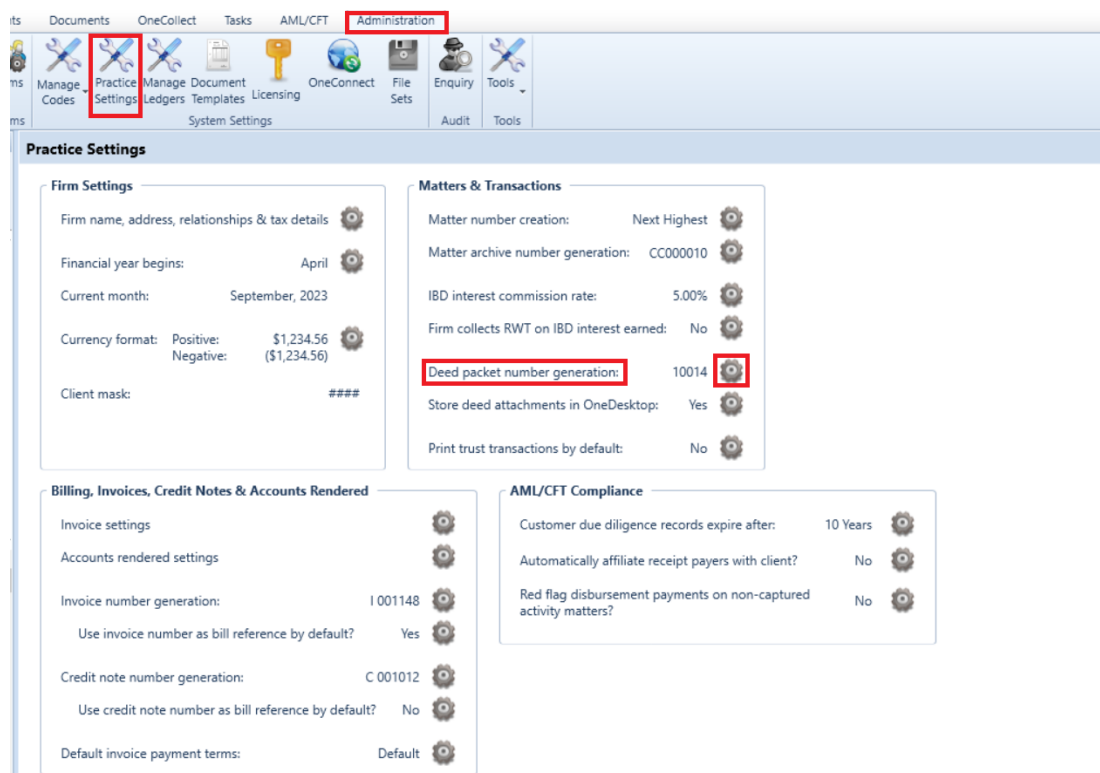


Figure 4.

Choose User defined, Client number or Incrementing numbers. If incrementing, choose that option and click 'Configure' (see Figure 5 below).

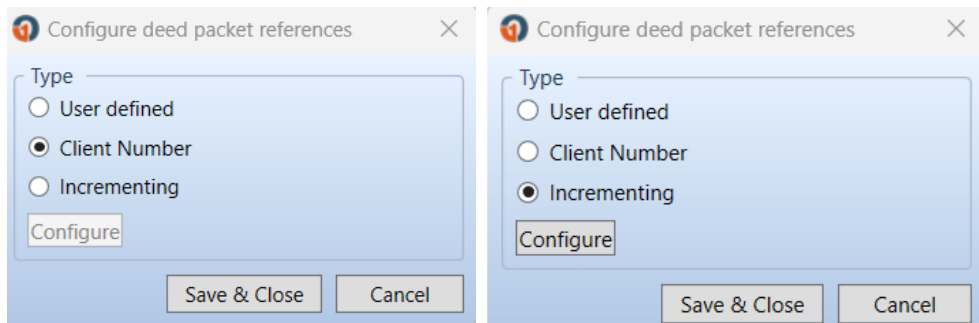


Figure 5.

The Configure deed packet references screen will appear as shown in Figure 6 below.

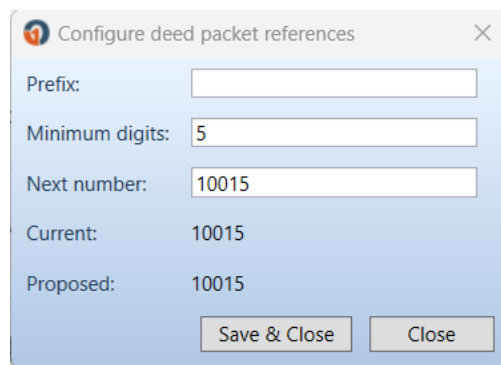


Figure 6.

Deed Attachment Storage

Whilst in Practice Settings under the Administration tab select 'Store deed attachments in OneDesktop' (see Figure 7 below).

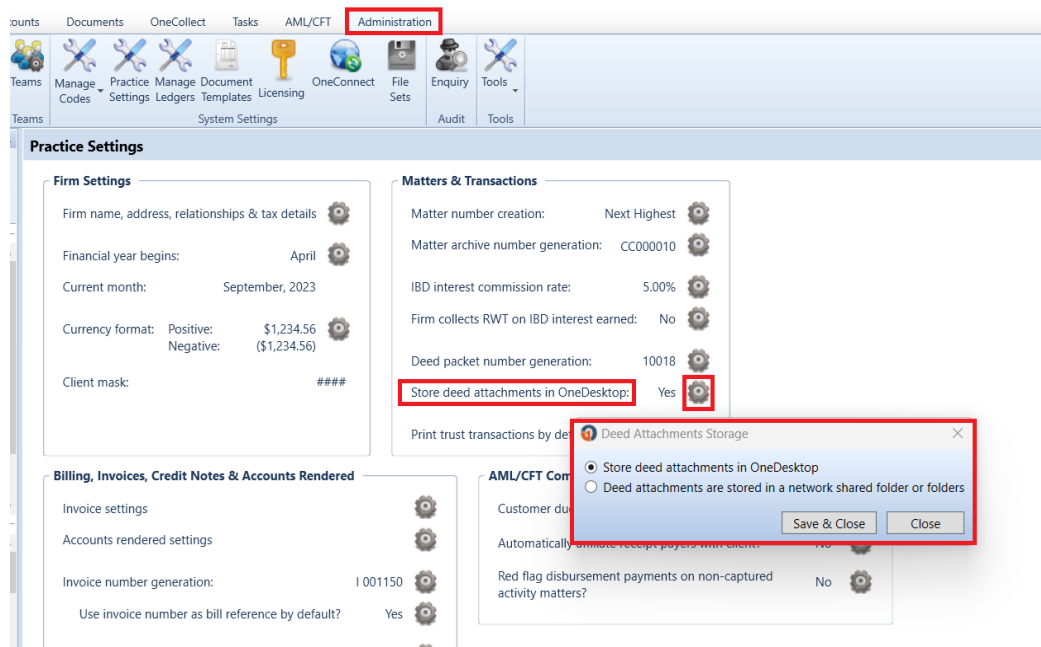


Figure 7.

When set to 'Store deed attachments in OneDesktop' a deeds folder will be visible in the Documents tab which contains the attached deeds. When a scanned deed is attached to a deeds record, this will be given a document ID and the packet number is displayed (see Figures 8-10 below).

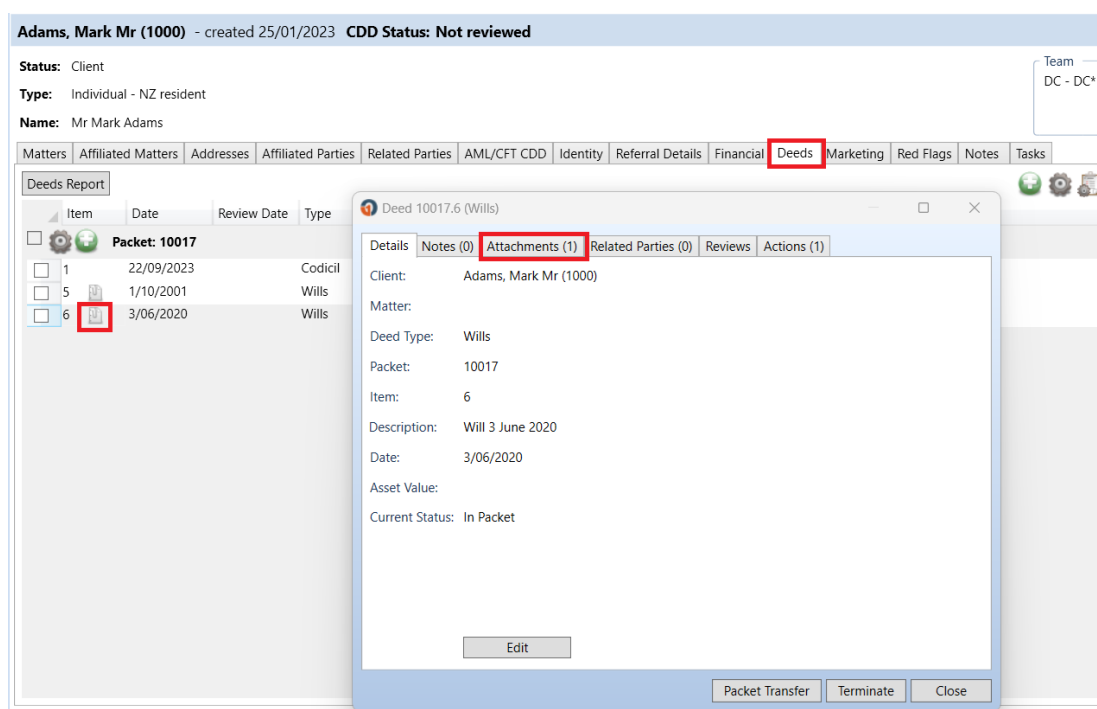


Figure 8.

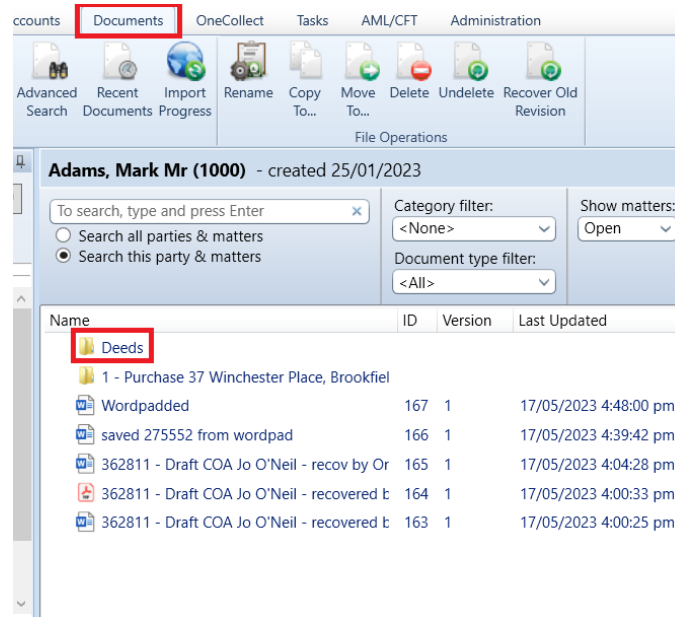


Figure 9.

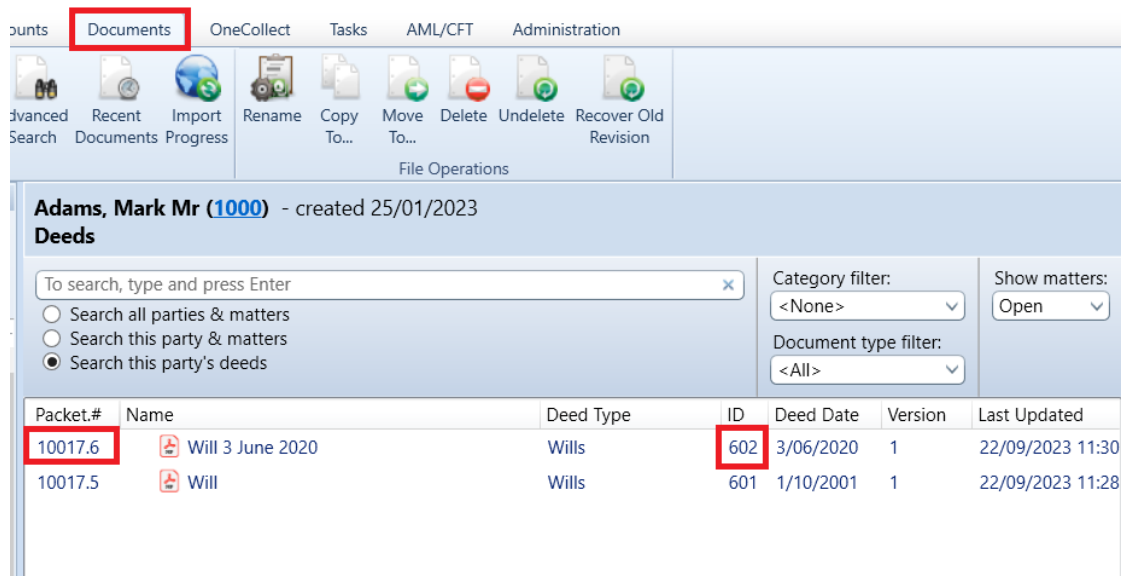


Figure 10.

Entering Deeds

Select the client and then the Deeds tab. Select the Green plus button and enter the deed information (see Figure 11 below).

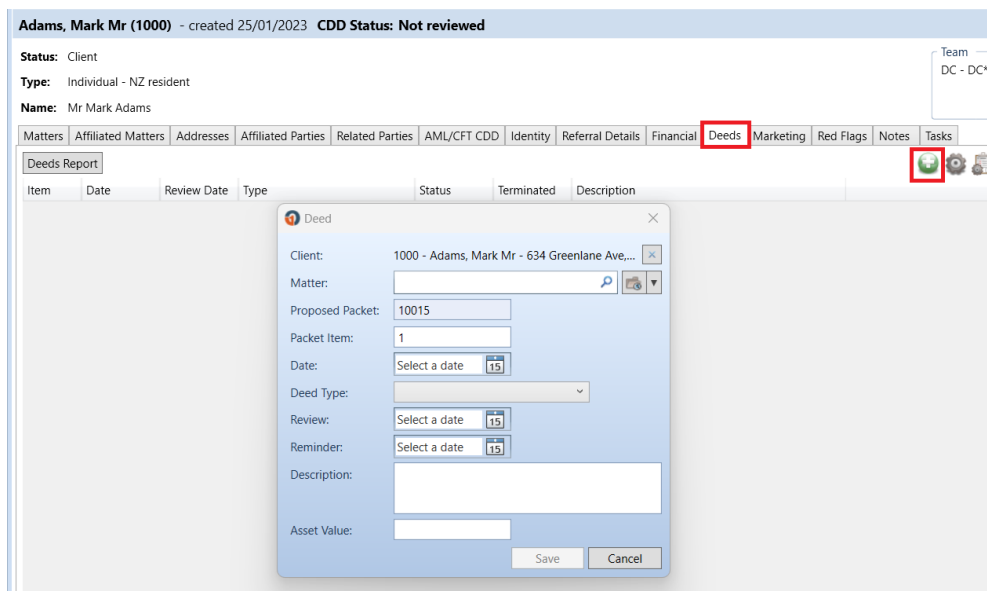


Figure 11.

Once the deed information is entered and saved, go back into the deed at any time and update the details by using the Edit button, add Notes, Attachments and Related Parties by using the green plus in each of those tabs. Add a Review or Reminder date by clicking 'Edit' in that tab and Actions by using the green plus (see Figure 12 below).

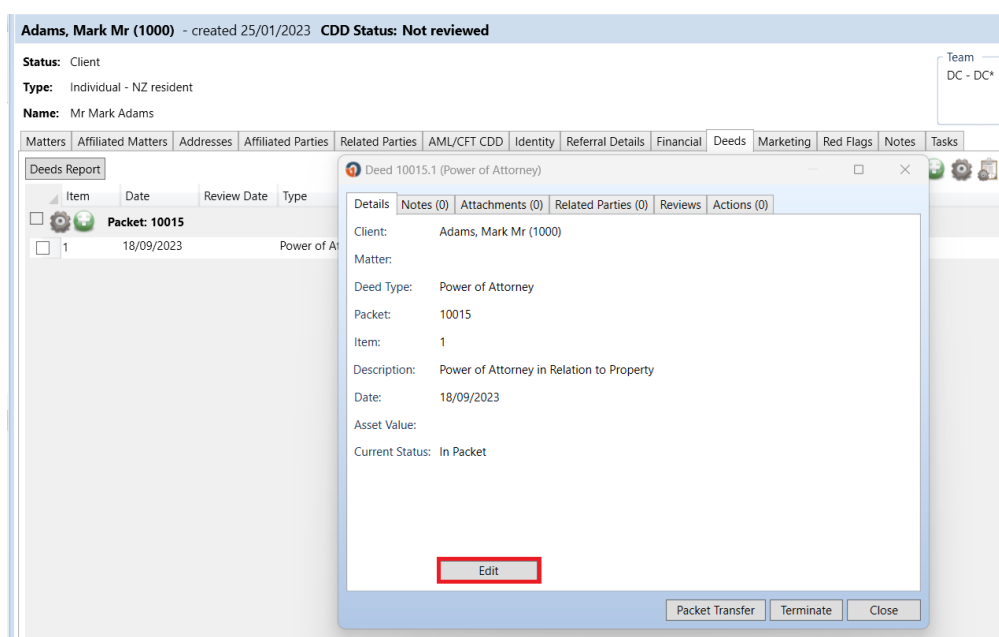


Figure 12.

To add another deed to an existing packet, use the green plus next to the packet number (see Figure 13 below).

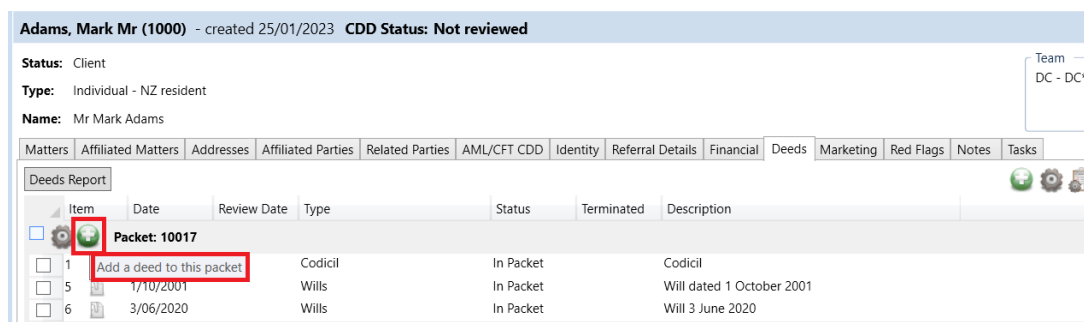


Figure 13.

To add another deed to a new packet, use the green plus to the right (see Figure 14 below).

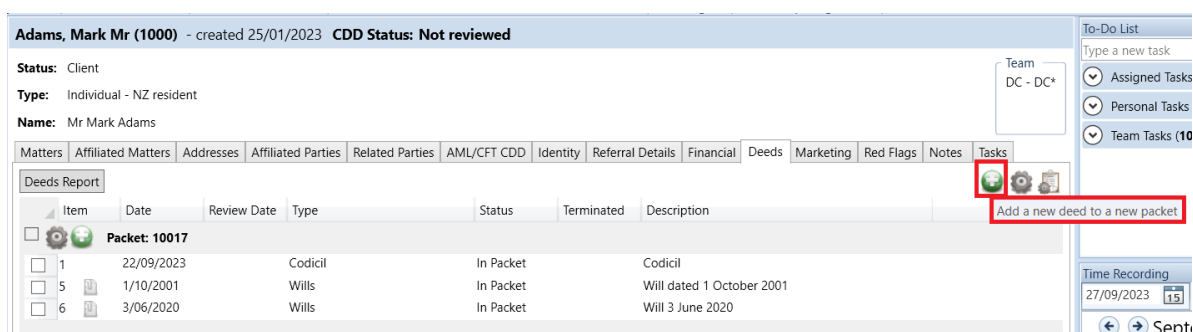


Figure 14.

Attaching a Document to a Deed

To attach a document to an existing deed record, go to the Deeds tab in the client, find the deed record and double-click to open it (see Figure 15 below).

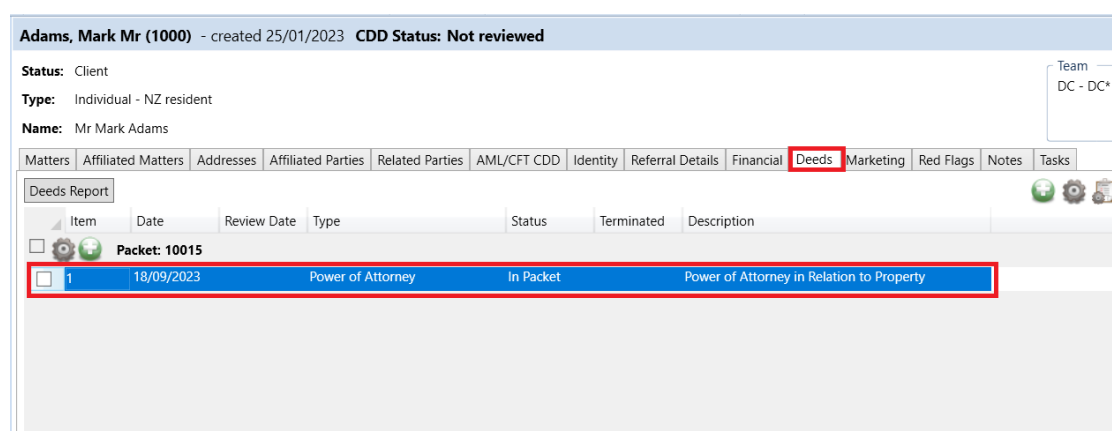


Figure 15.

Go to the Attachments tab and click the green plus, this will give the option to search documents from the Documents tab in OnePractice or from the local disk (see Figure 16 below).

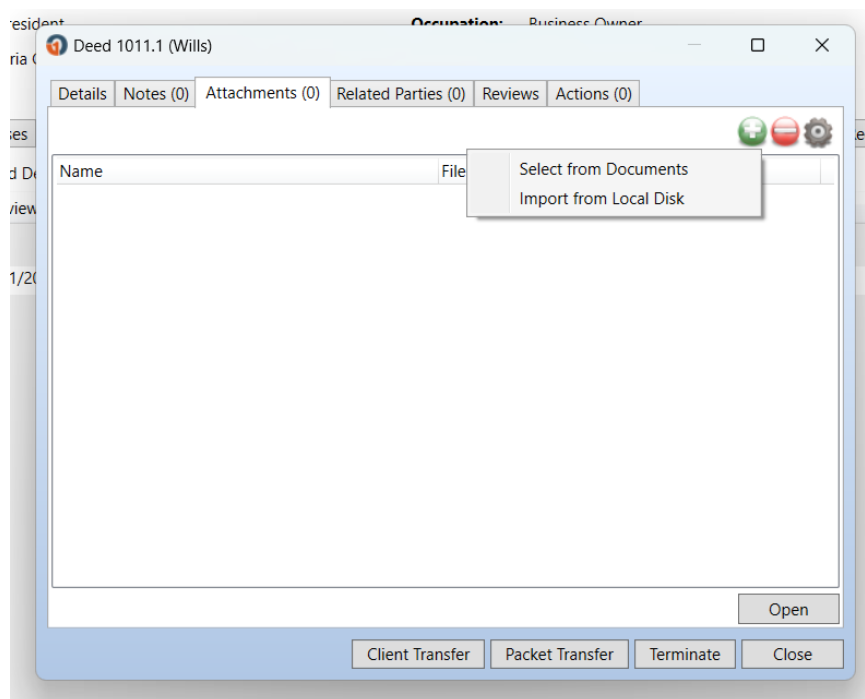


Figure 16.

Either option will open a search screen for navigation to the location of your scanned deed (see Figures 17 and 18 below). Highlight the relevant document and click open or double-click on the document to attach.

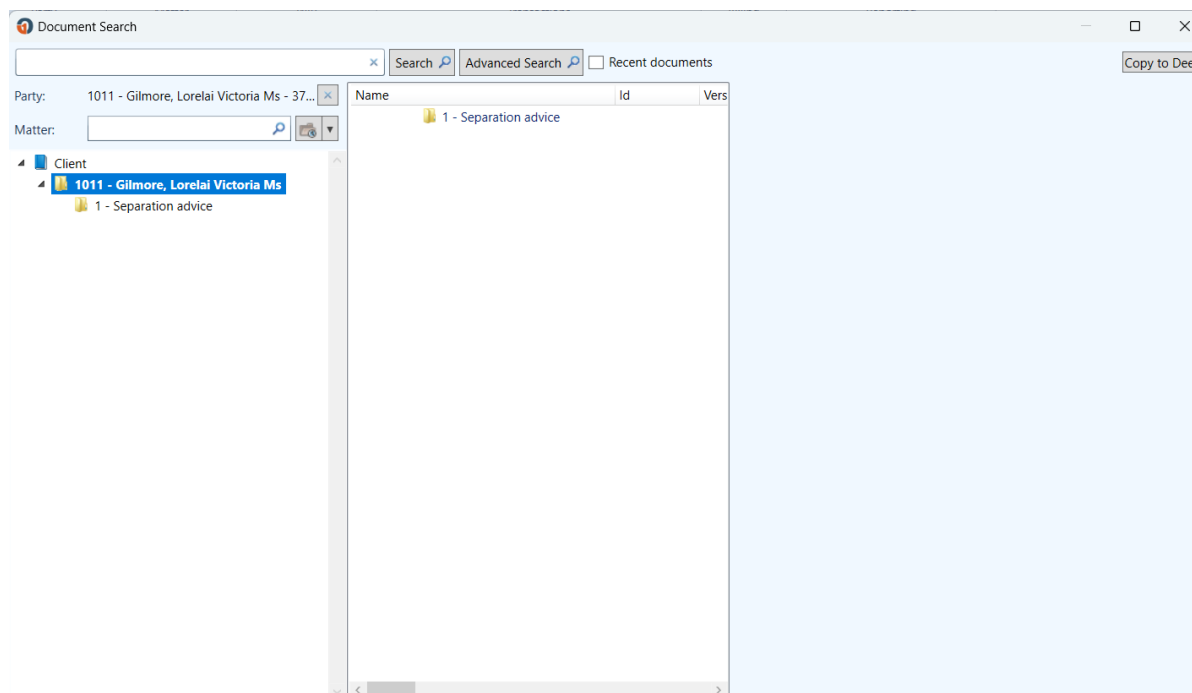


Figure 17.

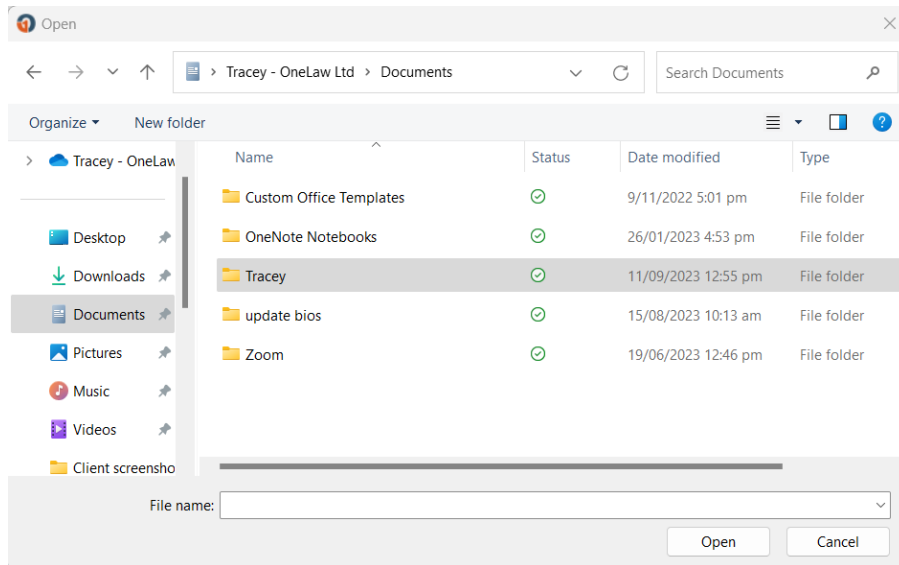


Figure 18.

When uploading from the local disk the document can then be renamed (see Figures 19 and 20 below).

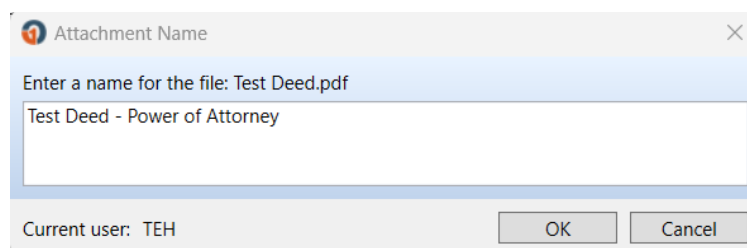


Figure 19.

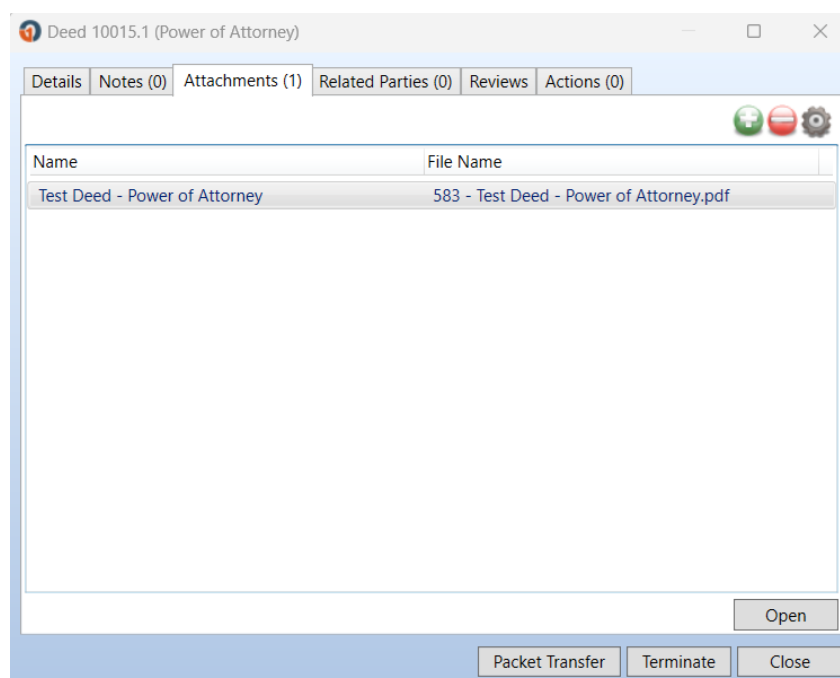


Figure 20.

Changing a Deed Type

Select the client, Deeds tab and double-click on the deed. Click the 'Edit' button and reselect the deed type from the drop-down menu (see Figures 21 and 22 below).

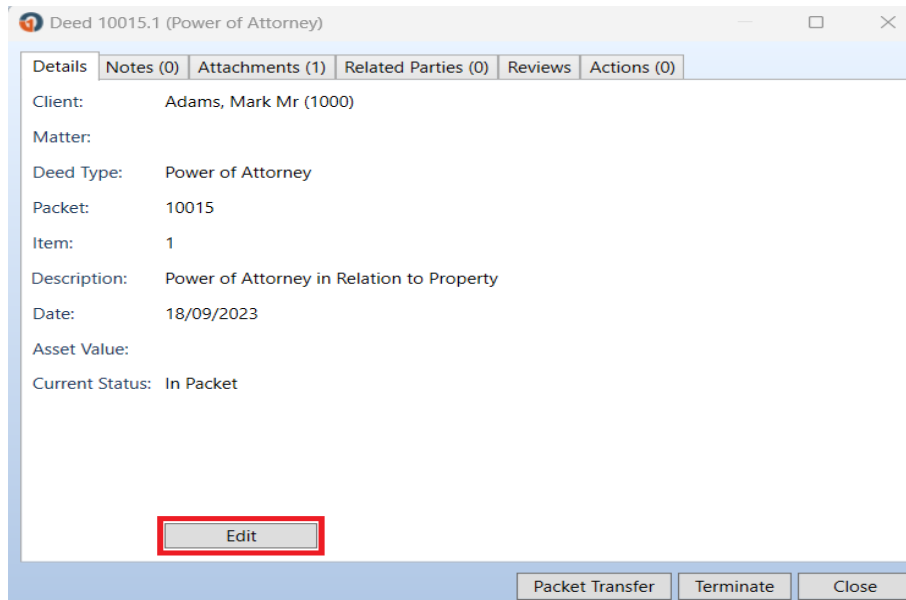


Figure 21.

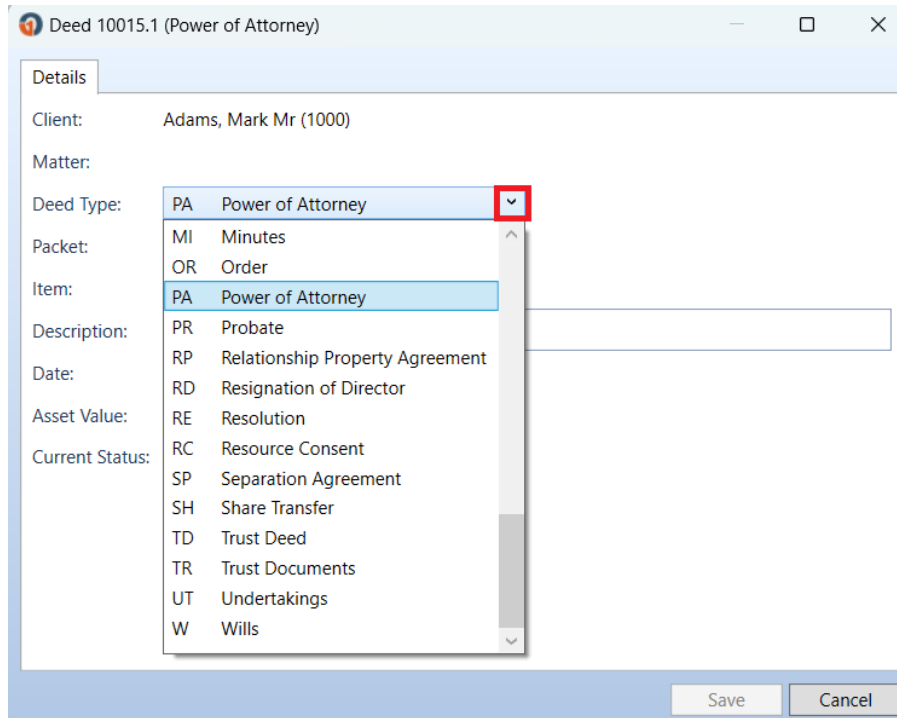


Figure 22.

Transferring Deeds

Packet Transfer

To transfer deeds from within the same client with multiple packets, select the deeds that are to be moved and click manage multiple selected deeds (see Figure 23 below).

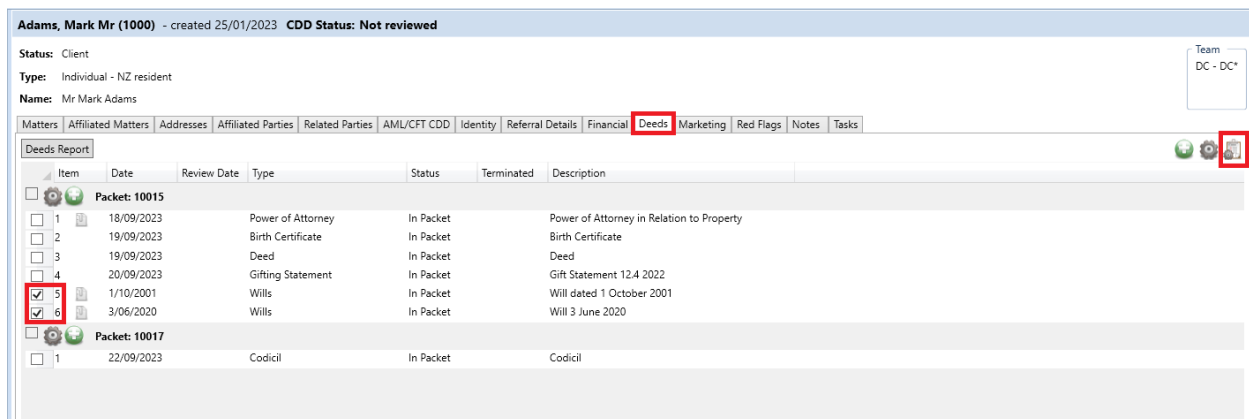


Figure 23.

Click Packet Transfer, enter the new (or existing packet number) and click 'OK' (see Figure 24 below).

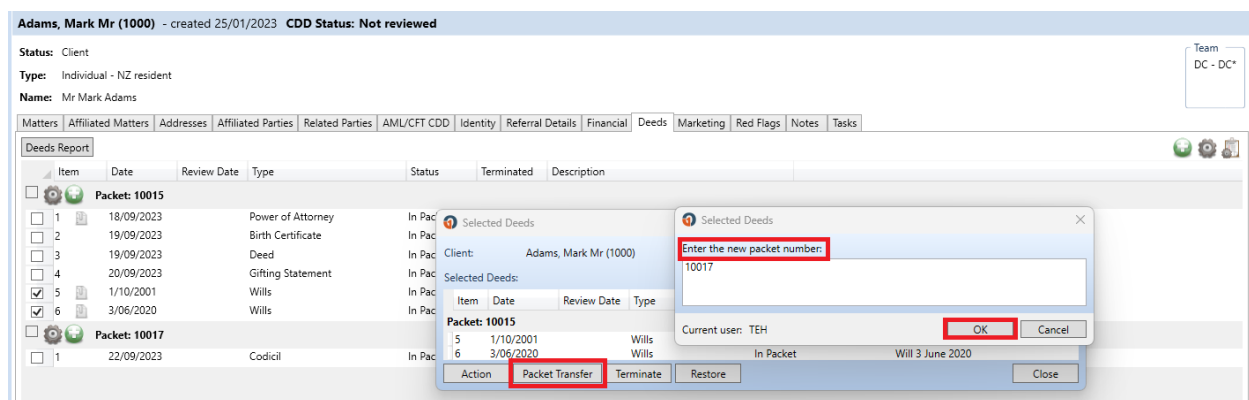


Figure 24.

Entries will appear as below.

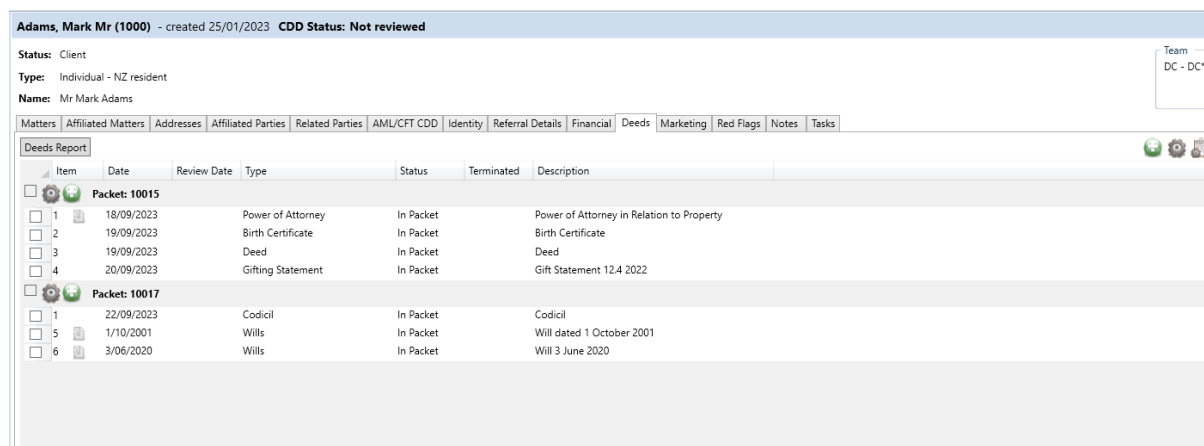


Figure 25.

OR if moving only one deed double-click on the deed to move, click 'Packet Transfer' and complete the screen with the new packet number (in this case 10017). It is possible to leave the item number as is or assign new item numbers (see Figures 26 and 27 below).

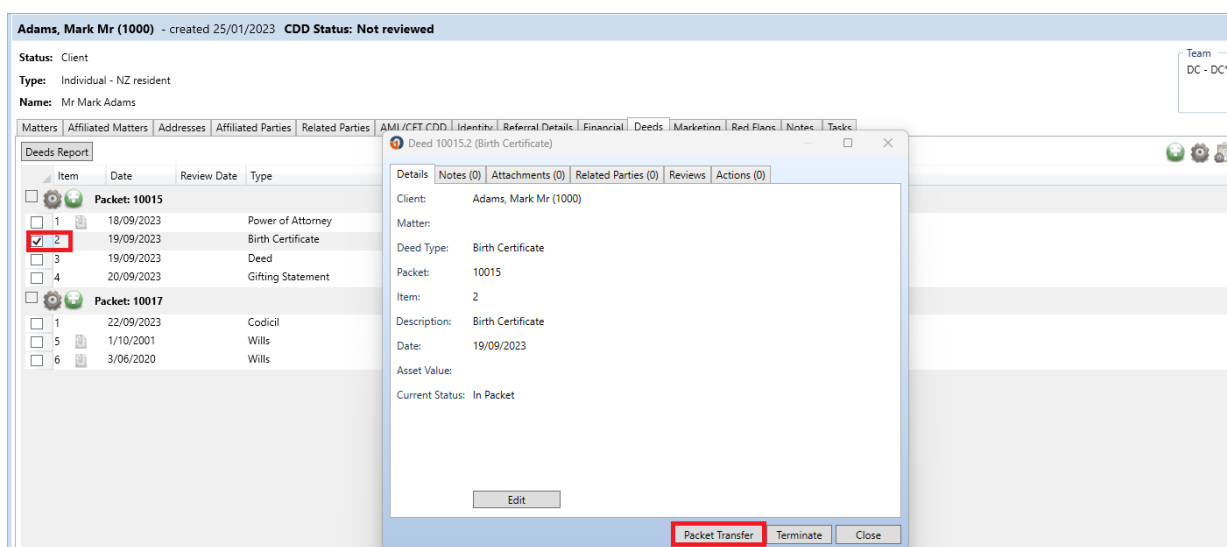


Figure 26.

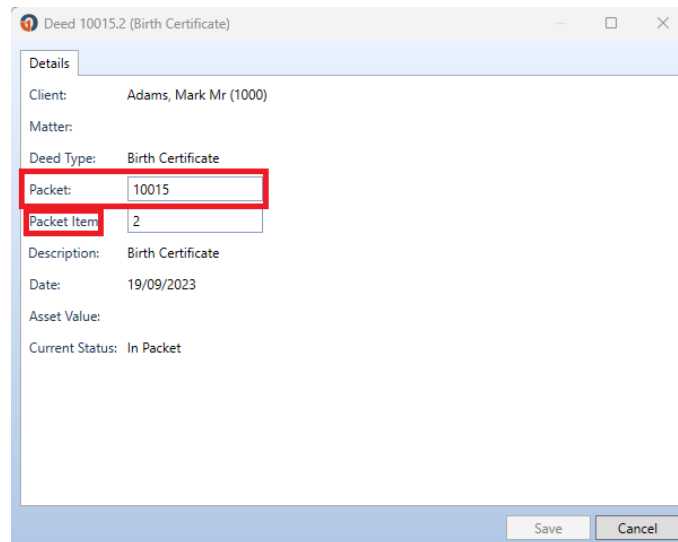


Figure 27.

Client Transfer

Deeds can also be transferred between clients by completing the same steps as above and selecting Client Transfer (see Figure 28 below).

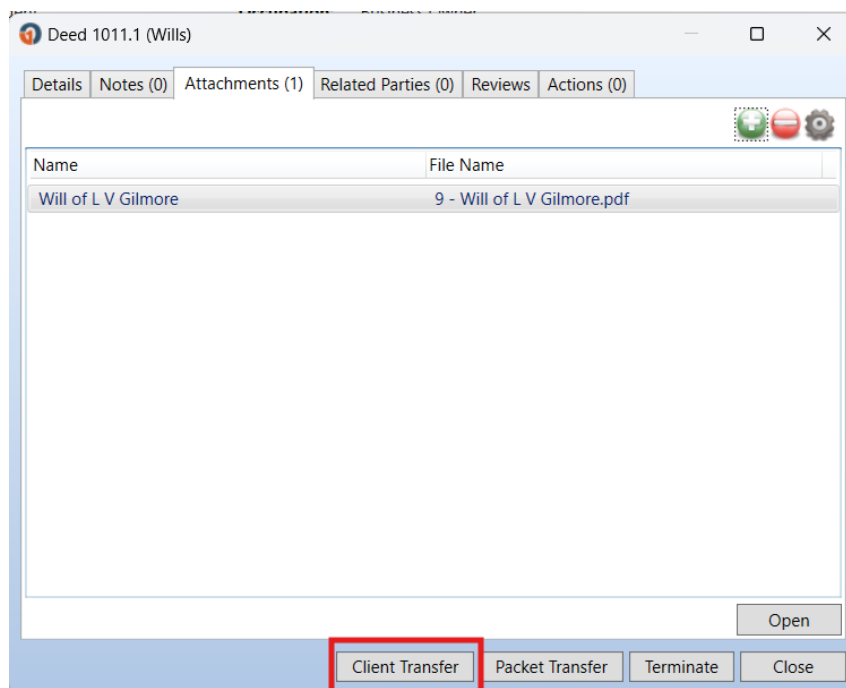


Figure 28.

A prompt will appear to select a new client party for the transfer, set a packet number (or select to use the same packet number) and set a reason (see Figure 29 below). Once selecting Transfer, a warning message will appear which can be switched off (see Figure 30 below).

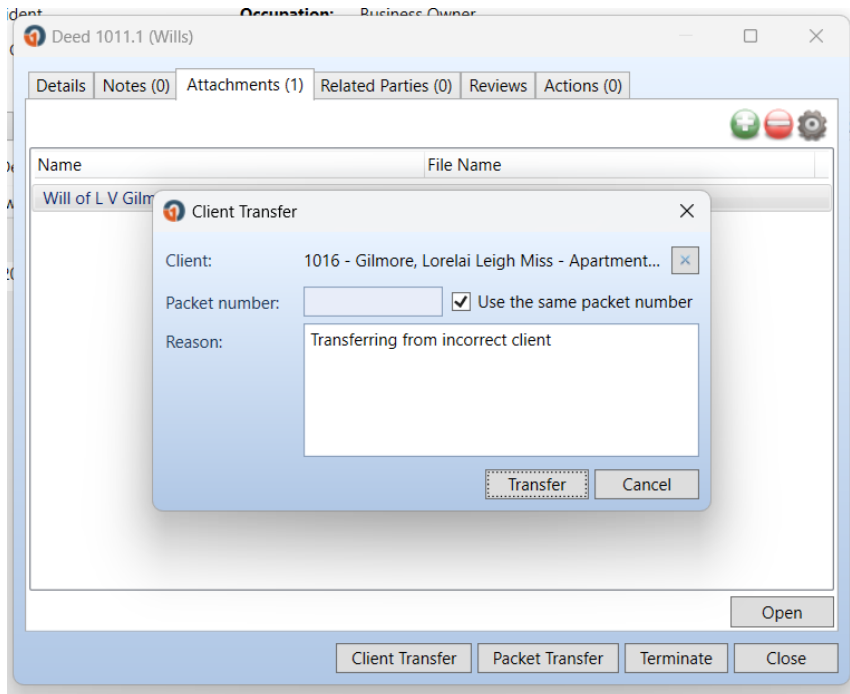


Figure 29.

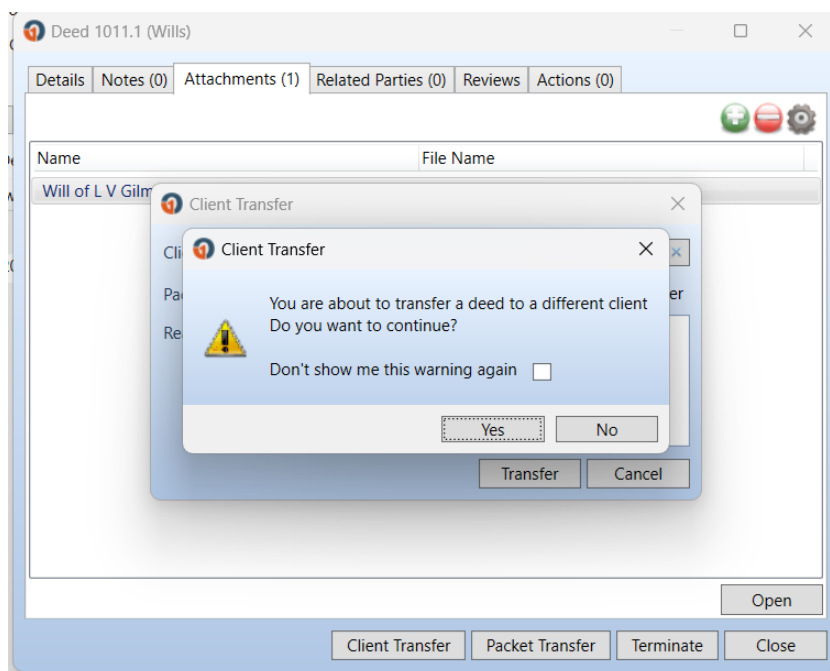


Figure 30.

The packet will now show as 'Transferred' in the original client record, however, this can be unticked and not shown. Transferred Deeds will display greyed out in the original client when 'Show Transferred Deeds' is ticked on in the Deeds tab (see Figures 31 and 32 below).

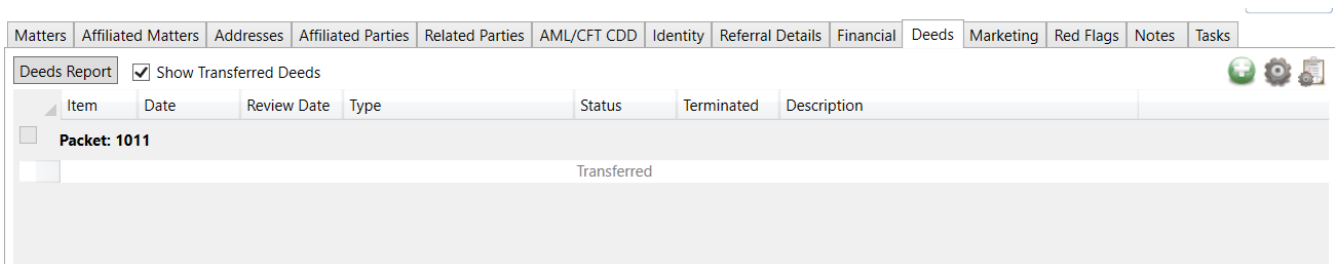


Figure 31.

Deeds

Report Selections : Author: <All>; Deed Type: <All>; Deed Status: <All>; Include transferred deeds: true; Item Date Range: <All>; Include notes: true; Include related parties: true; Deeds: Live & Terminated

Client	Packet	Item	Type	Deed Date	Description	Status	Review	Terminated
1011	Gilmore, Lorelai Victoria Ms - Client Author: Hannah Christie - HC							
	1011	1	W		Will of L V Gilmore - signed 15 Sep 2024	Transferred		
Moved to Gilmore, Lorelai Leigh Miss (1016) by Craig. Bex on 25/09/2024. Reason: Transferring from incorrect client								

Figure 32.

Changing a Deed Status

Select deeds that require a status change and click manage multiple selected deeds

Click 'Action' and use the drop-down arrow to select the new deed status (see Figure 33 below).

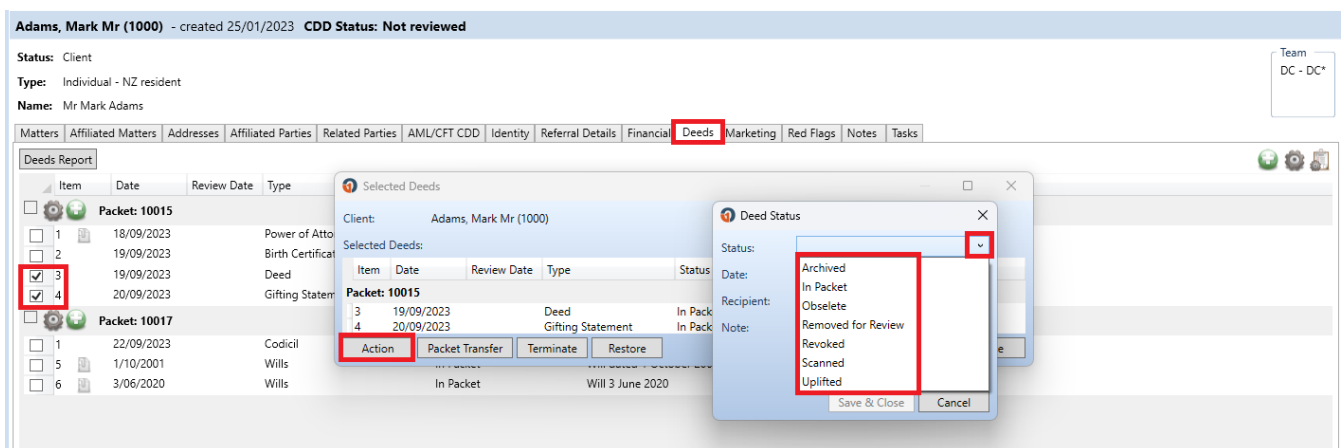


Figure 33.

Insert the date, name of recipient if applicable and any note (see Figure 34 below).

The 'Deed Status' dialog box contains the following fields:

- Status: Uplifted
- Date: 25/09/2023
- Recipient: First Rate Lawyers Ltd
- Note: Test note

Buttons: Save & Close, Cancel

Figure 34.

The deeds will still appear in the deeds packet as below (Figure 35).

Adams, Mark Mr (1000) - created 25/01/2023 CDD Status: Not reviewed

Status: Client
Type: Individual - NZ resident
Name: Mr Mark Adams

Team: DC - DC*

Matters | Affiliated Matters | Addresses | Affiliated Parties | Related Parties | AML/CFT CDD | Identity | Referral Details | Financial | Deeds | Marketing | Red Flags | Notes | Tasks

Deeds Report

Item	Date	Review Date	Type	Status	Terminated	Description
Packet: 10015						
<input type="checkbox"/>	1	18/09/2023	Power of Attorney	In Packet		Power of Attorney in Relation to Property
<input type="checkbox"/>	2	19/09/2023	Birth Certificate	In Packet		Birth Certificate
<input type="checkbox"/>	3	19/09/2023	Deed	Uplifted		Deed
<input type="checkbox"/>	4	20/09/2023	Gifting Statement	Uplifted		Gift Statement 12.4 2022
Packet: 10017						
<input type="checkbox"/>	1	22/09/2023	Codicil	In Packet		Codicil
<input type="checkbox"/>	5	1/10/2001	Wills	In Packet		Will dated 1 October 2001
<input type="checkbox"/>	6	3/06/2020	Wills	In Packet		Will 3 June 2020

Figure 35.

To Terminate a Deed

Select deeds to be terminated and click manage multiple selected deeds

Click Terminate, put in the reason deeds are being terminated and click 'OK' (see Figure 36 below).

Adams, Mark Mr (1000) - created 25/01/2023 CDD Status: Not reviewed

Status: Client
Type: Individual - NZ resident
Name: Mr Mark Adams

Team: DC - DC*

Matters | Affiliated Matters | Addresses | Affiliated Parties | Related Parties | AML/CFT CDD | Identity | Referral Details | Financial | Deeds | Marketing | Red Flags | Notes | Tasks

Deeds Report

Item	Date	Review Date	Type	Status	Terminated	Description
Packet: 10015						
<input type="checkbox"/>	1	18/09/2023	Power of Attorney	In Packet		Power of Attorney in Relation to Property
<input checked="" type="checkbox"/>	2	19/09/2023	Birth Certificate	In Packet		Birth Certificate
<input checked="" type="checkbox"/>	3	19/09/2023	Deed	Uplifted		Deed
<input checked="" type="checkbox"/>	4	20/09/2023	Gifting Statement	Uplifted		Gift Statement 12.4 2022
Packet: 10017						
<input type="checkbox"/>	1	22/09/2023	Codicil	In Packet		Codicil
<input type="checkbox"/>	5	1/10/2001	Wills	In Packet		Will dated 1 October 2001
<input type="checkbox"/>	6	3/06/2020	Wills	In Packet		Will 3 June 2020

Selected Deeds (Client: Adams, Mark Mr (1000))

Item	Date	Review Date	Type	Status
2	19/09/2023		Birth Certificate	In P
3	19/09/2023		Deed	In P
4	20/09/2023		Gifting Statement	In P

Buttons: Action, Packet Transfer, Terminate, Restore

Selected Deeds (Enter the reason for terminating this deed(s))

No longer current

Current user: TEH

Buttons: OK, Cancel

Figure 36.

To terminate a single deed double-click the deed entry, click 'Terminate' and put in the reason the deed is being terminated (see Figure 37 below).

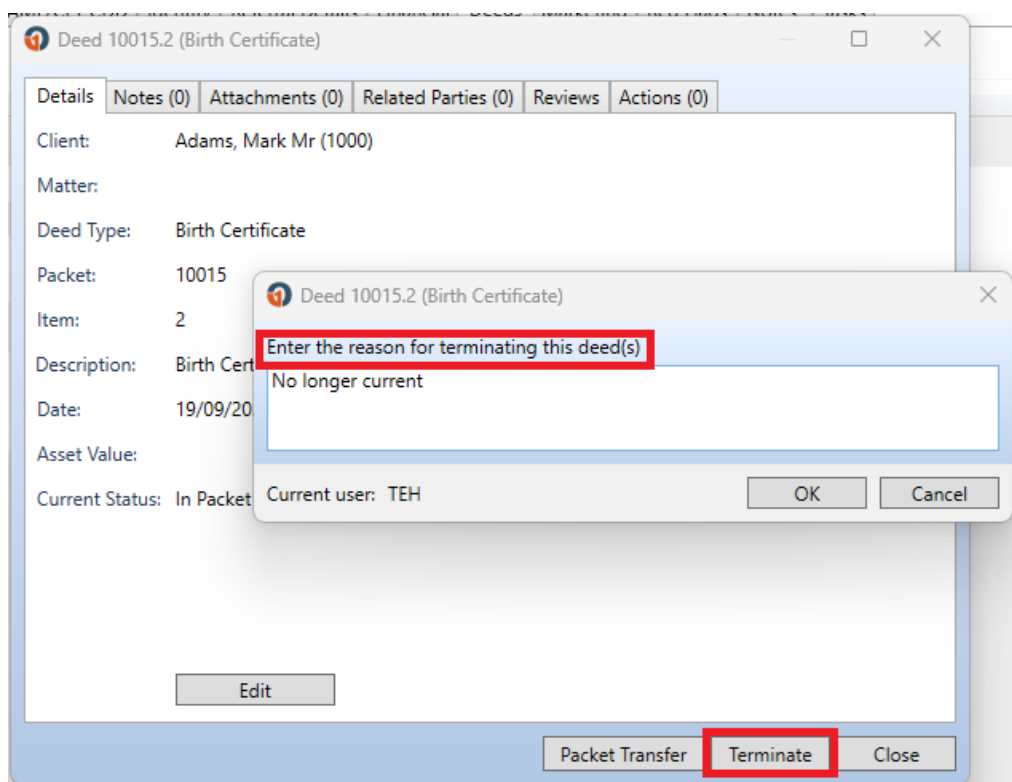


Figure 37.

Terminated deeds will appear as greyed out items in the deeds packet (see Figure 38 below).

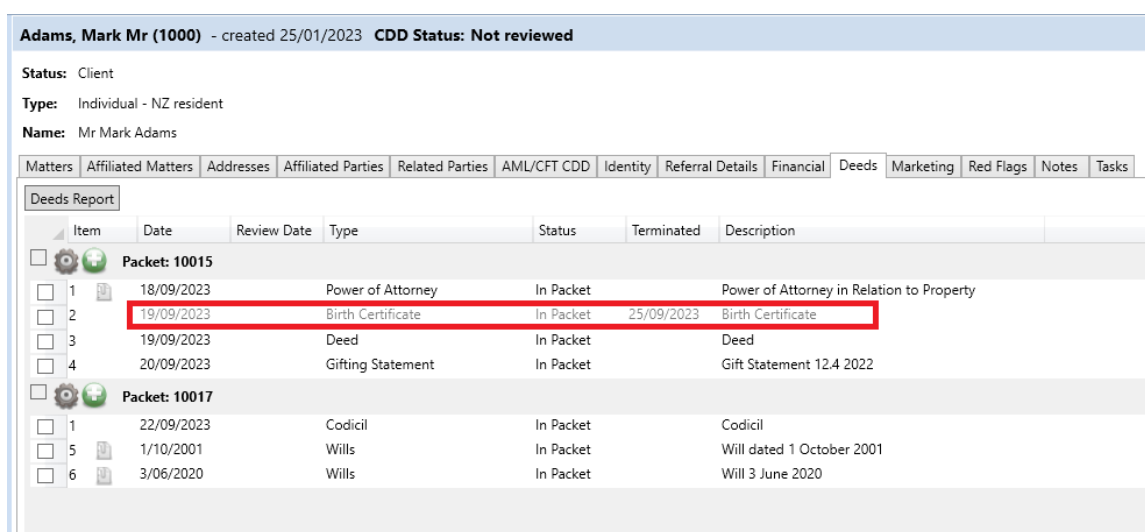


Figure 38.

It is possible to restore a terminated deed by double-clicking on the greyed-out deed entry and clicking 'Restore.' Enter a reason and click 'OK' (see Figure 39 below).

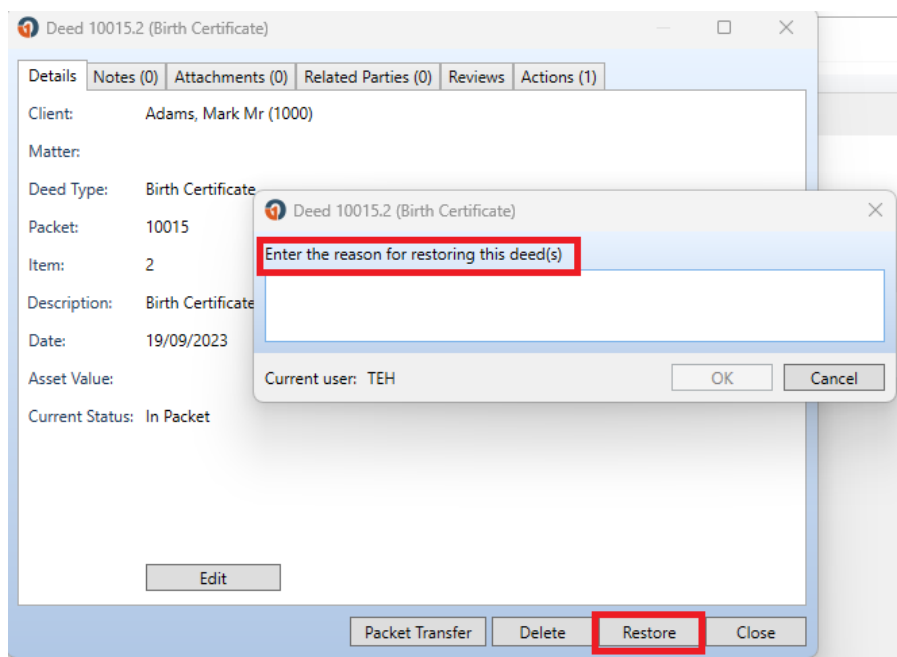


Figure 39.

Item will reinstate itself in the deed packet.

To Delete a Deed

First, terminate all deeds that are to be deleted.

NOTE:

- + Deeds can only be deleted **one at a time**

Click Terminate and enter the reason for terminating the deed (see Figure 40 below).

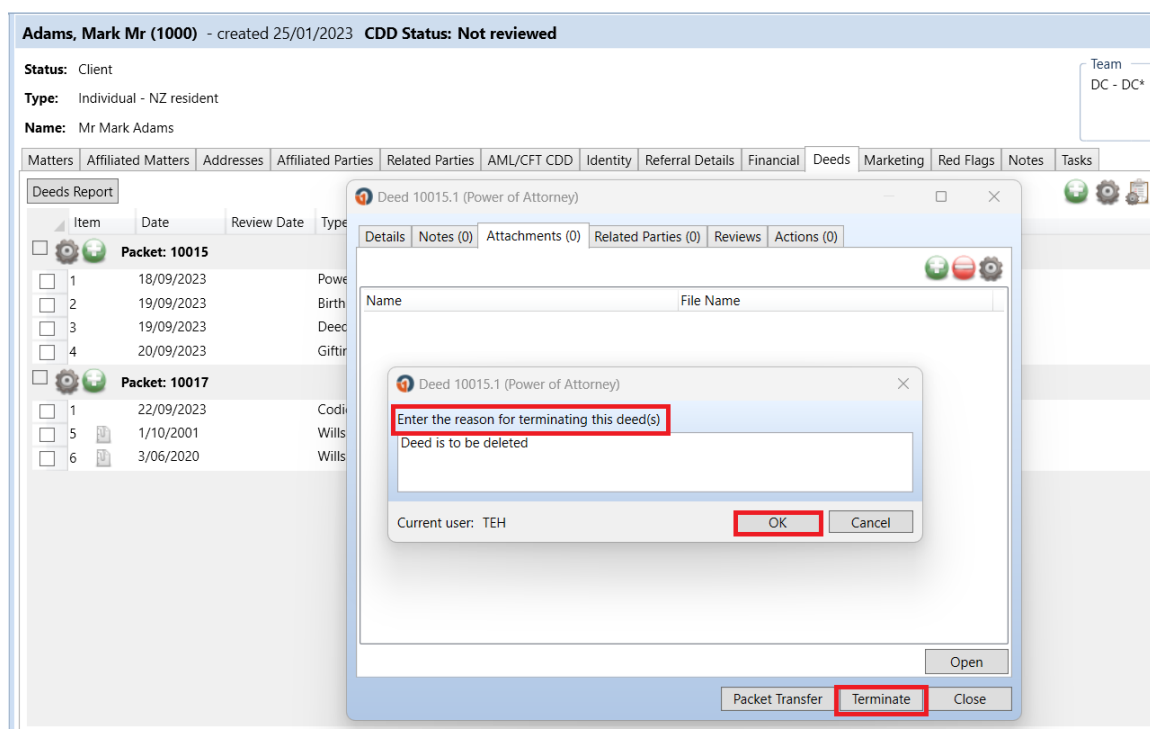


Figure 40.

The deed will show greyed out in the list. Double-click to open, click 'Delete' and enter the reason for deleting this deed and click 'OK' (see Figure 41 below).

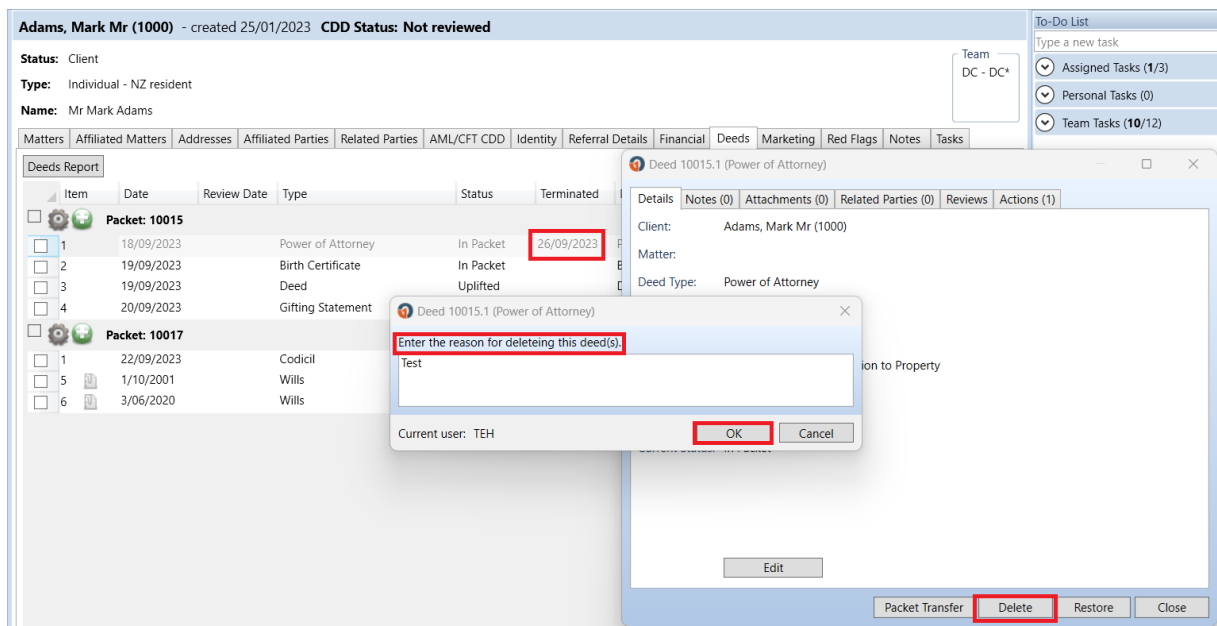


Figure 41.

If the deed record has an attachment, the message in Figure 42 below will appear – click Yes to continue and delete the deed.

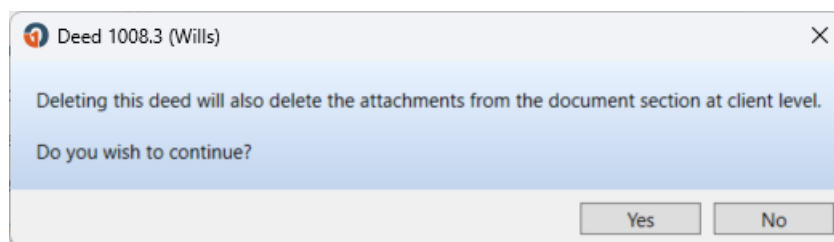


Figure 42.

Deed Reports

To view a Deeds Report per client, select 'Deeds Report' in the client's Deeds tab (see Figure 43 below).

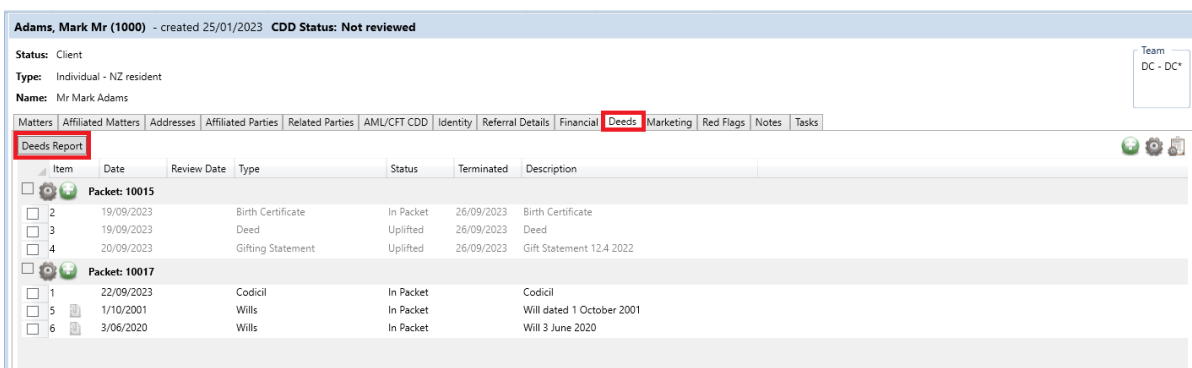


Figure 43.

To view a Deeds Report for all Clients, Authors, Type and Status select Deeds from the Report List (see Figure 44 below).

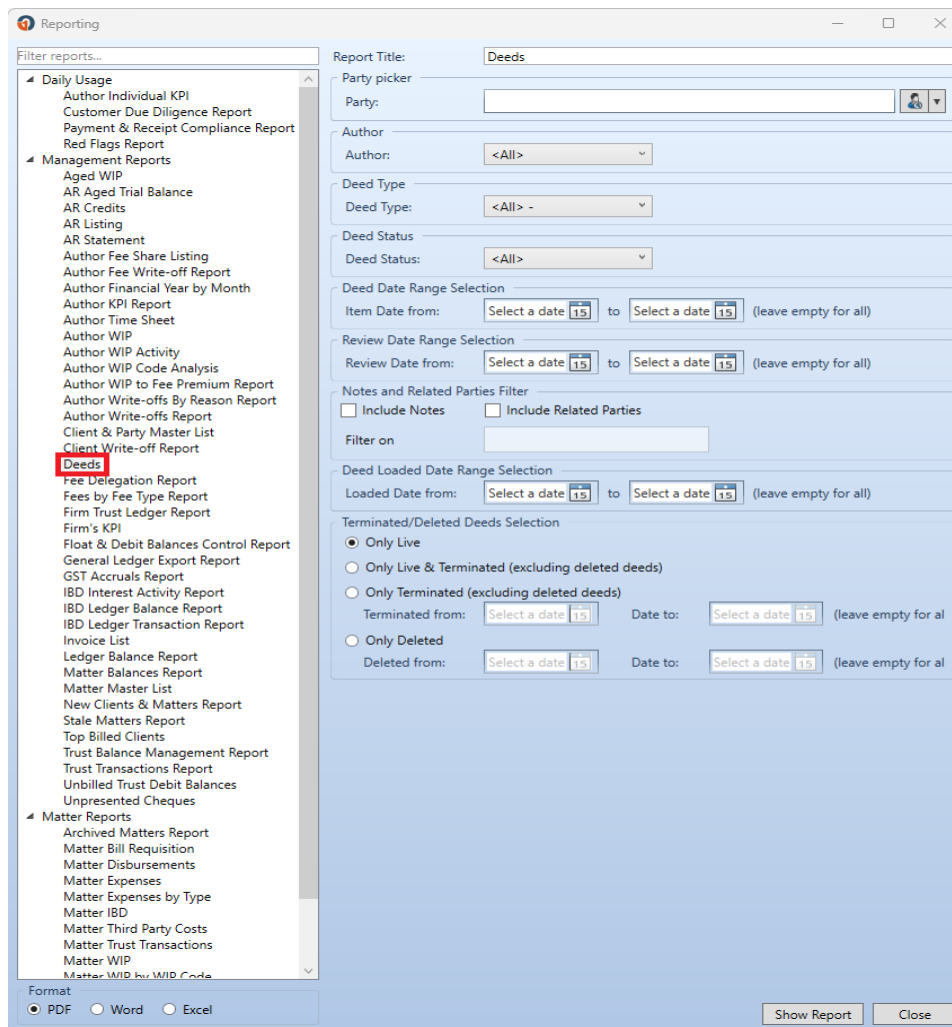


Figure 44.