Land Information New Zealand
Toitū te whenua

Release notes for conveyancers

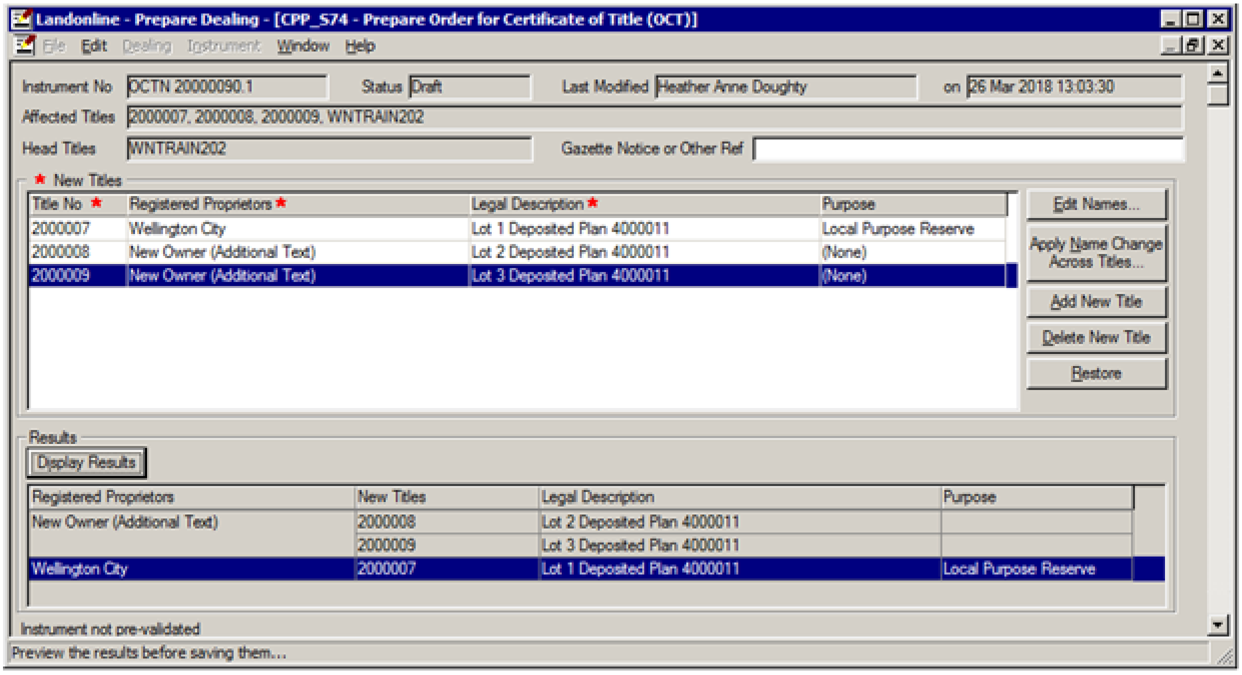
Changes for lawyers and conveyancers as part of Landonline Release 3.17

New features include:

Order for New Certificate of Title (OCTN) to be included in e-Dealing forms

LINZ Ref: LOLCM-38
Description: Changes in Landonline to enable OCTN Instruments (formerly OCT) to be prepared as a Template Instrument.

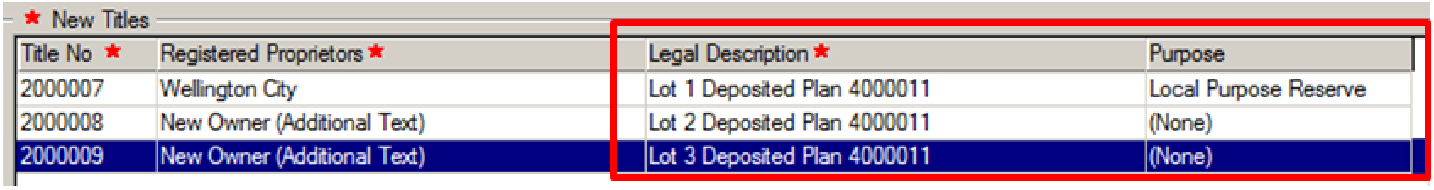
Following the 3.17 release, the OCT Order for New Certificate of Title Instrument (which was an image only Instrument) has been replaced by a new Template OCTN Instrument:



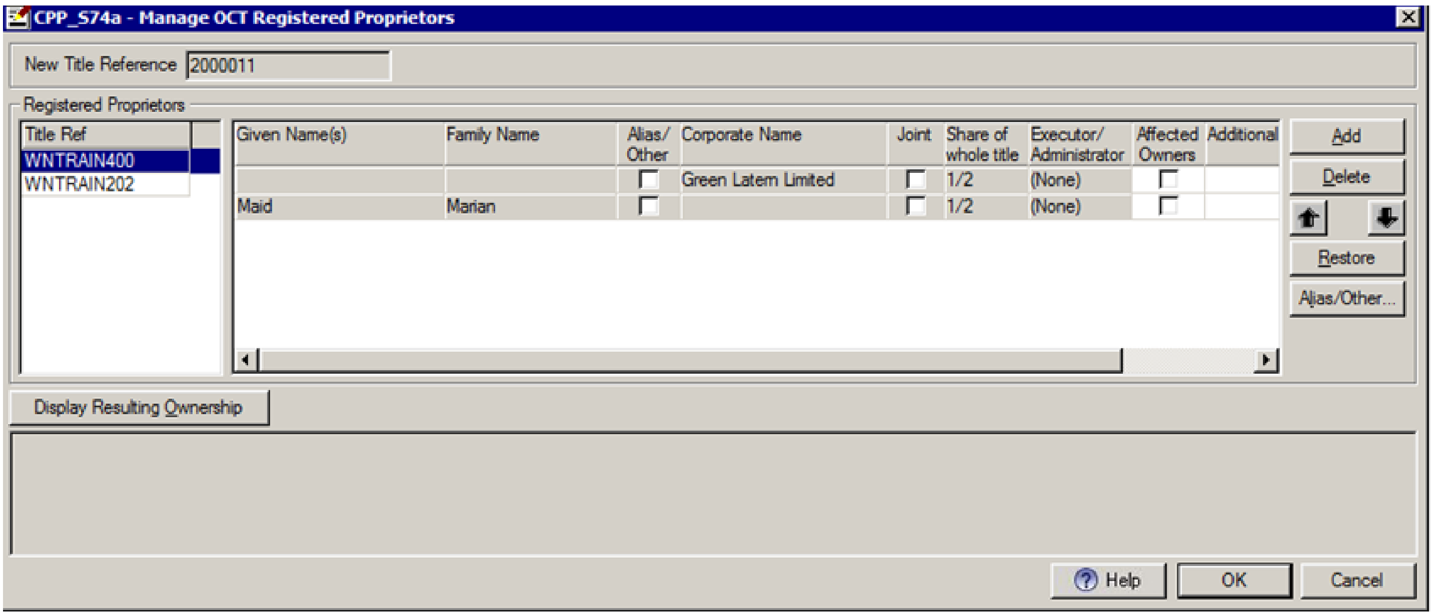
The new OCTN Instrument auto-populates information from:

- Head Titles Affected (e.g. Owners, Legal Descriptions, Purposes)
- Linked LT Plans (e.g. Purposes, Legal Descriptions)
- Prior Instruments that change ownership (e.g. Transfers)

Legal Descriptions and Purposes can be edited directly in the Prepare Order for Certificate of Title screen:

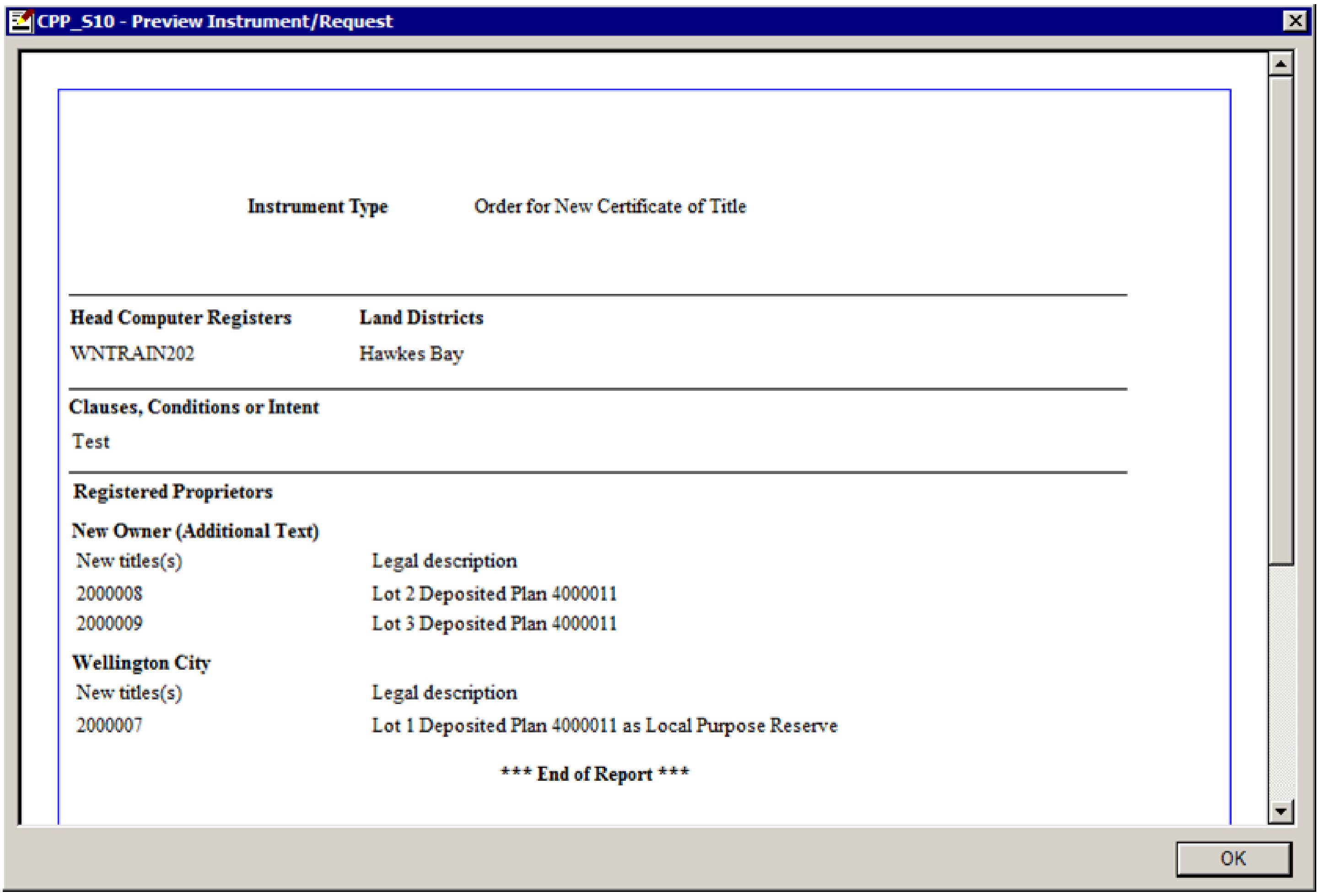


Proprietor names can be added and edited in the Manage Registered Proprietors screen:



Additional Text and Consents can also be added if required:

Once data has been entered, the following Instrument view can be generated:



Details of the Landonline 3.17 Order for Certificate of Title changes are set out below under the following headings:

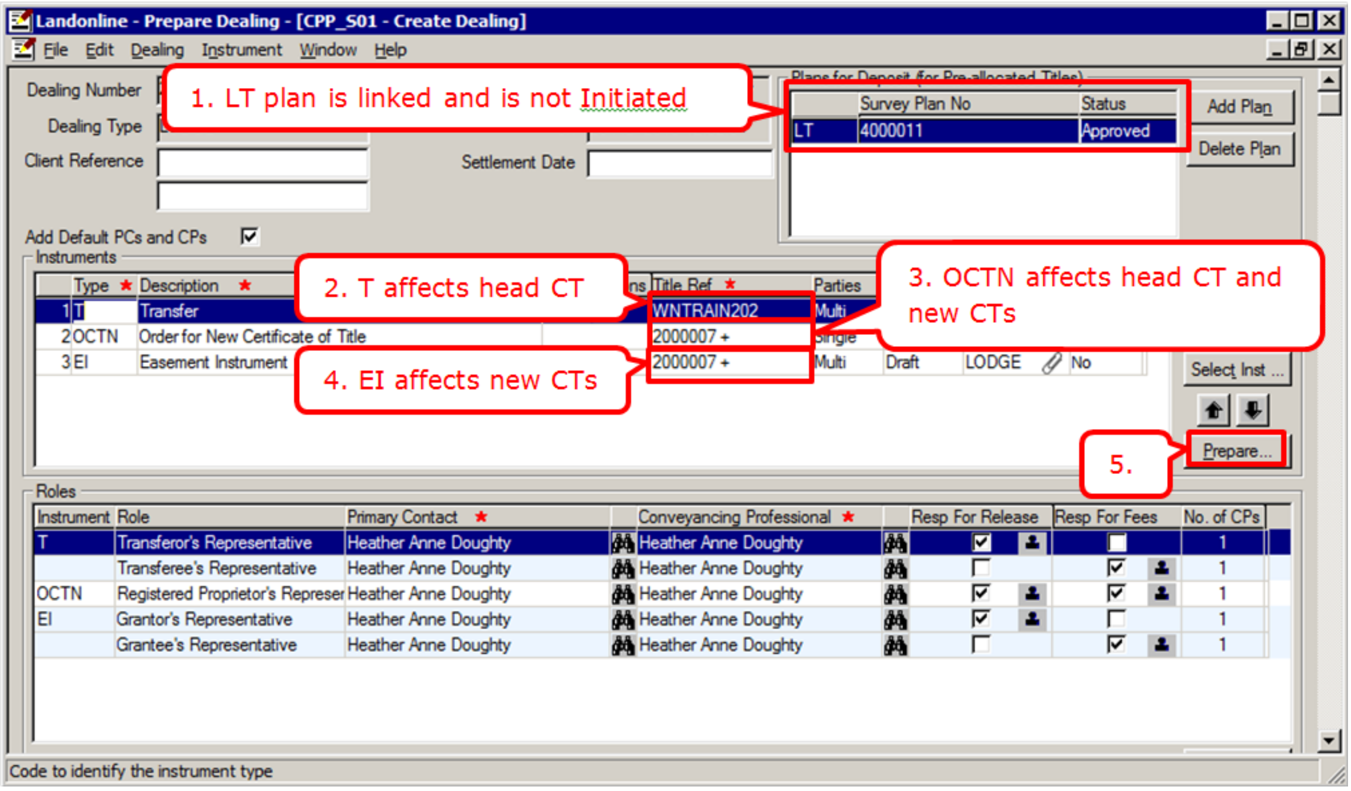
1. Setting up a Dealing
2. Prepare Order for Certificate of Title Screen - Summary
3. Selecting Registered Proprietor Names
4. Adding/Editing Registered Proprietor Names
5. Proprietorship Options (Sole Tenants, Shares and Combination Tenancies)
6. Applying Name Changes to Multiple Titles
7. Transition
8. Known Issues

1. Setting up a Dealing

Following the 3.17 release, the OCT Order for New Certificate if Title Instrument (which was image only) has been replaced by a new Template OCTN Instrument.

In essence, setting up a new-title Dealing has not changed. However, to enable an OCTN to auto-populate information - it is important Dealings are set up correctly:

1. Ensure the LT plan is linked (if any). Note –LT plans that only have a status of 'initiated' will not auto-populate Legal Descriptions and Purposes
2. Instruments lodged prior to the OCTN should affect the head Title. Also ensure any prior Instruments that change ownership (such as Transfers) are prepared correctly
3. The OCTN should affect the head Title and all new Titles that will issue
4. All Instruments following the OCTN should affect the relevant new Titles

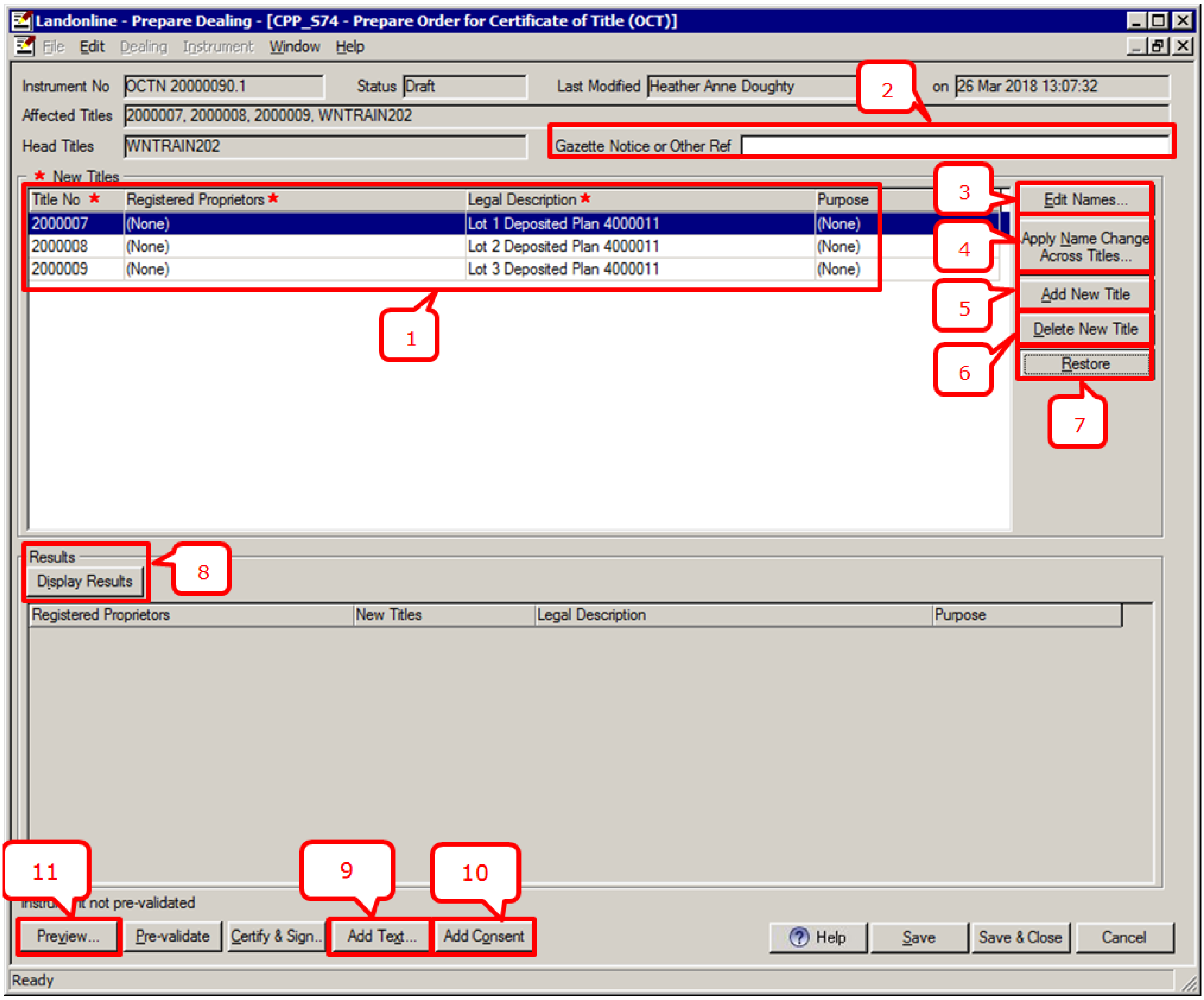


5. Once the Dealing is set up, the new "Prepare Order for Certificate of Title" screen will display when the OCTN is selected and "Prepare" is clicked (see section 2)

2. Prepare Order for Certificate of Title Screen – Summary

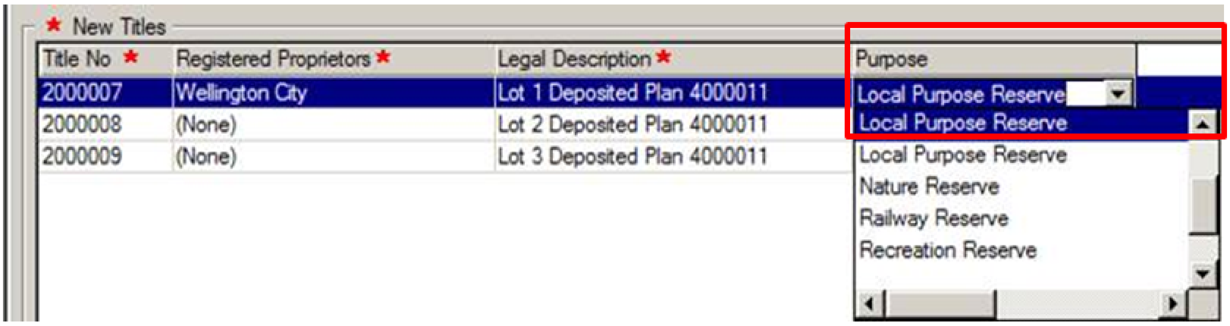
The Prepare Order for Certificate of Title Screen auto-populates information based on details entered in the Create Dealing screen (see section 1).

A summary of the new screen is as follows:



1. The **New Titles** Data window displays a summary of all new Title details, including:
   - Title No – pre-allocated titles
   - Registered Proprietor – auto-populates or is selectable from:
     - Head Titles
     - Prior Transfers (or change of ownership instruments) in the same dealing (if any)
     - LT Plan (if any). I.e. if a Lot is vesting in a Council
     - *Note* – proprietors can be added/edited by clicking "Edit Names…" (see section 4)
   - Legal Description – auto-populates from:
     - LT Plan (if any). *Note* - the plan must not have a status of Initiated to auto-populate Legal Descriptions correctly
     - Head Titles (if no LT Plan is linked to the Dealing)
     - *Note* – these details can be edited by typing directly into the Legal Description field

- Purpose – auto-populates from LT Plan (if any), or is selectable from a drop down menu. Purpose text can also be edited in the Purpose text field (e.g. for specifying a type of local purpose reserve):



2. The **Gazette Notice or Other Reg** field is used to add a Document or Gazette Notice reference (e.g. if there is no head Title)

3. Click **Edit Names** to add or edit new proprietors (see section 4)

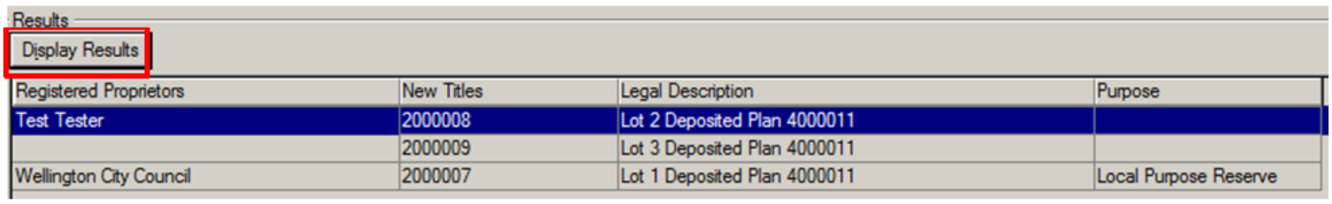
4. Click **Apply Name change Across Titles** to apply proprietor names from one new title to other new titles (see section 6)

5. Click **Add New Title** to add new Title references:

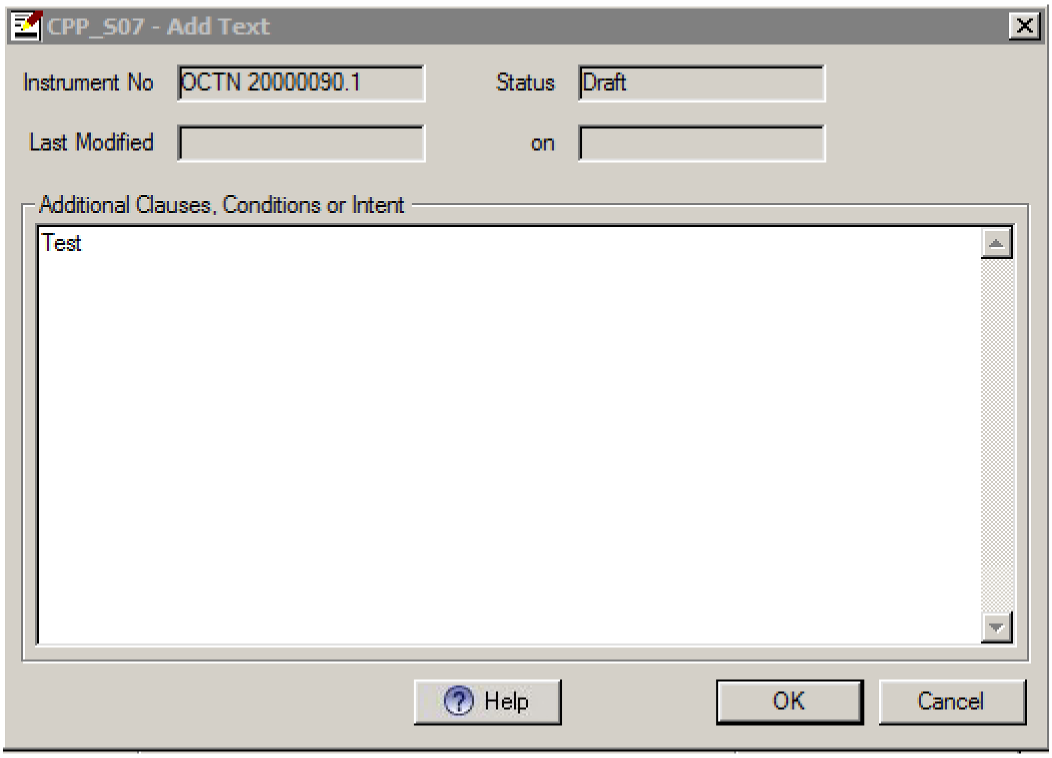
6. Click **Delete New Title** to delete new Titles references that are not required

7. To all details to their original state after making changes, click **Restore**

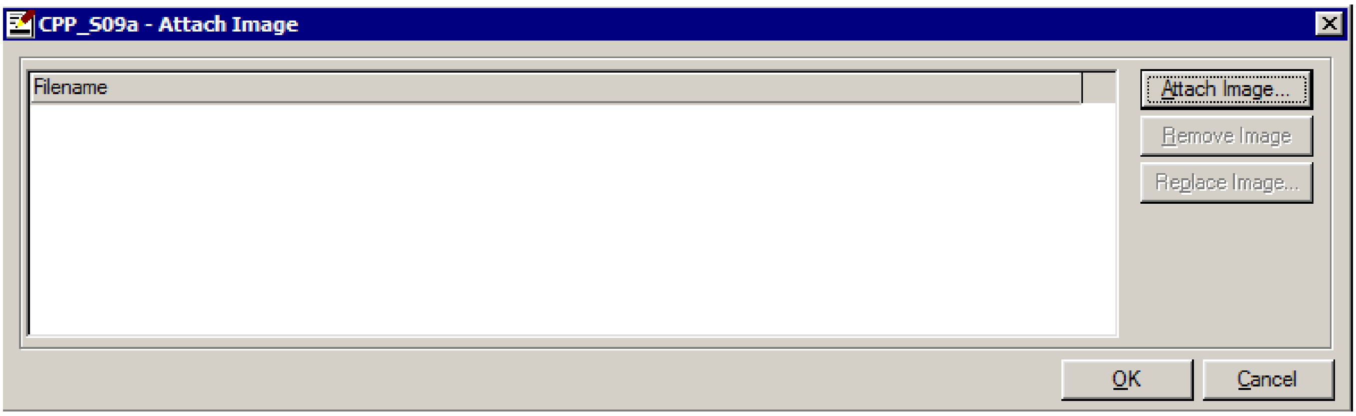
8. Click **Display Results** to generate a preview of information entered:



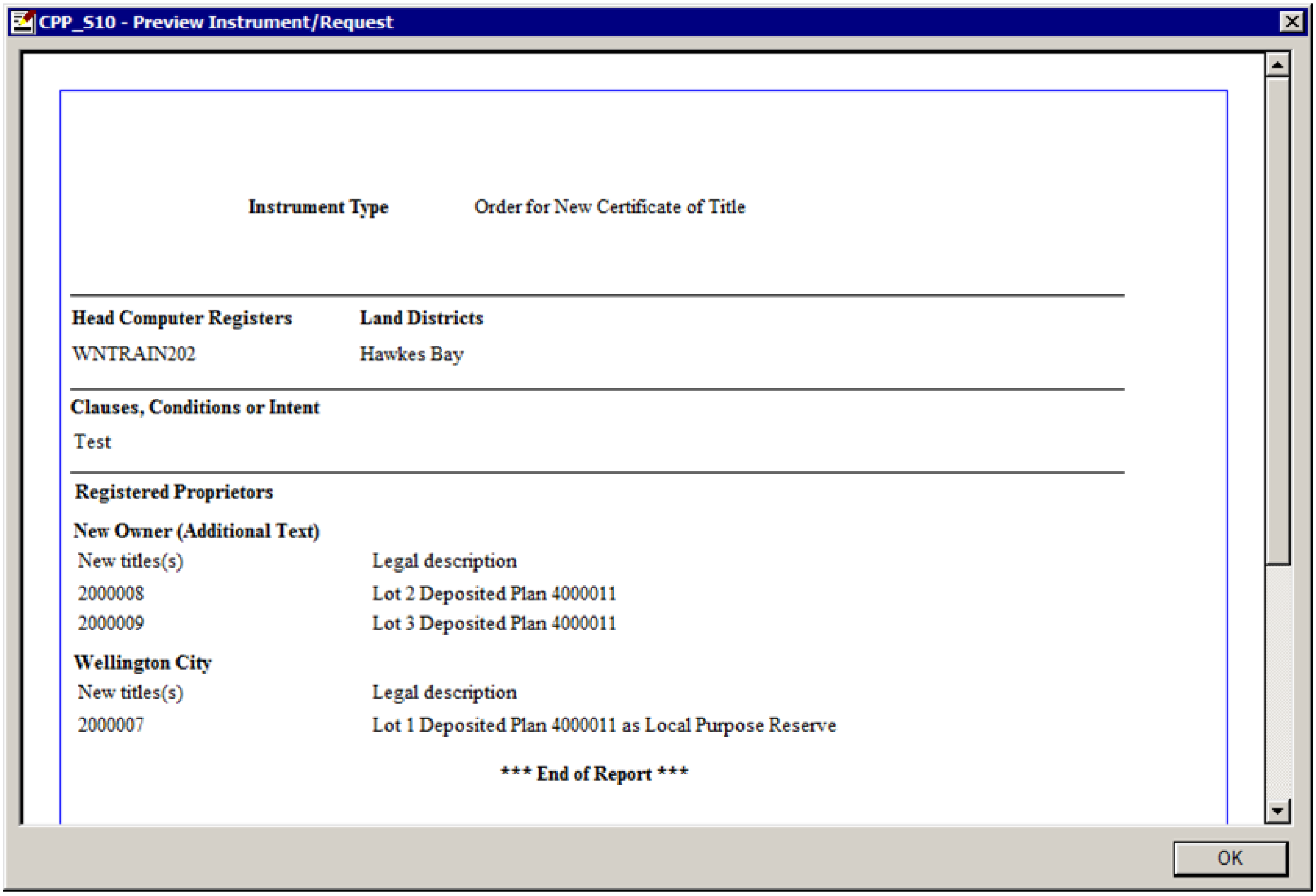
9. Click **Add Text** to enter any additional details relating to the OCTN



10. Click **Add Consent** to attach a scanned image consent (e.g. Mortgagee's consent)



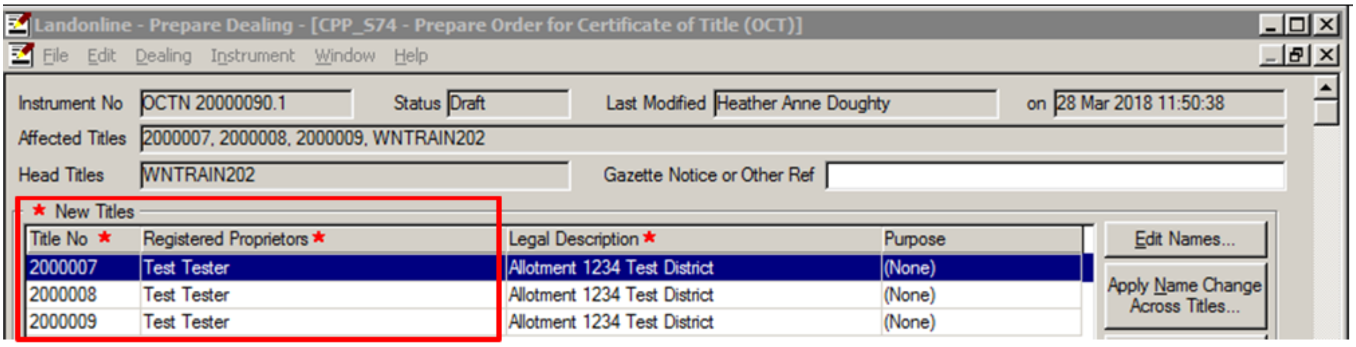
11. Click **Preview** to generate an Instrument view from information entered:



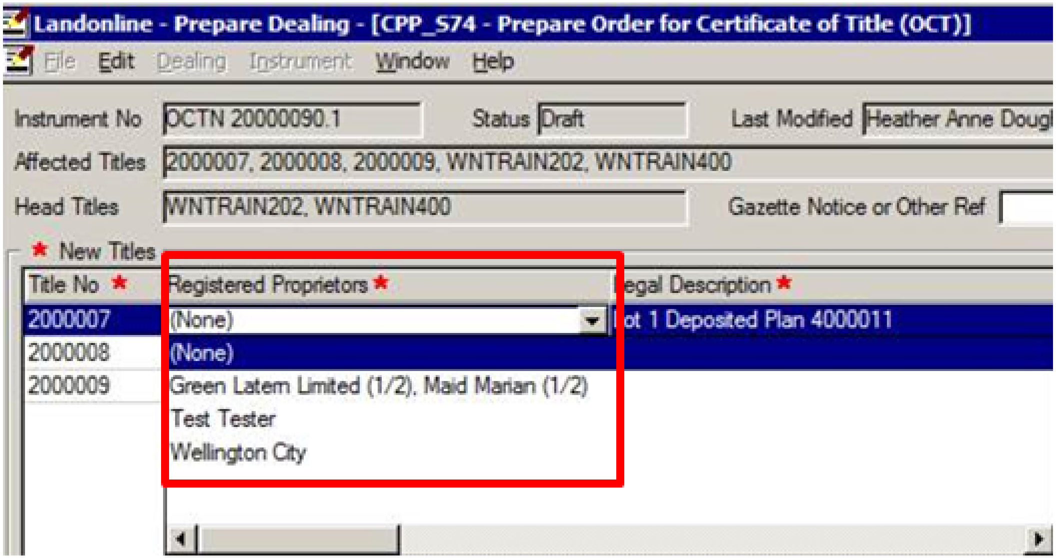
3. Selecting Registered Proprietor Names

For most OCTN Instruments, proprietor names do not need to be manually added. The two most common scenarios are as follows:

1. One Head Title (and no Prior Transfers/Vestings)
   If the OCTN only affects one head Title – the proprietors will default to the names shown on the Head Title:



2. Multiple Head Titles and/or Plan Vestings
   If there are multiple head Titles and/or plan vestings, the proprietors need to be selected from the **Registered Proprietor** drop down menu:



4. Adding/Editing Registered Proprietor Names

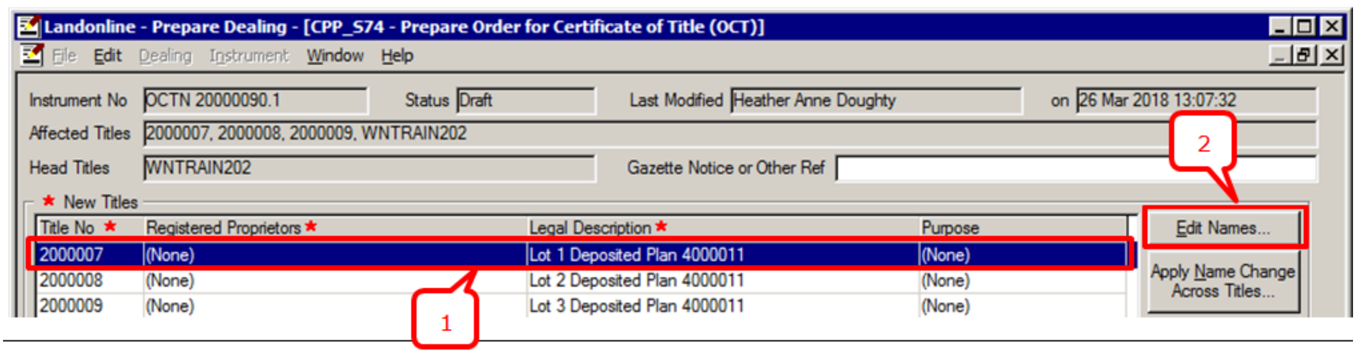
If default proprietor names cannot be selected (as per section 3), then new or additional names can be added from the "Manage Registered Proprietors screen."

However, before adding new or additional names, it is important to check whether your Dealing has been set up correctly. I.e.

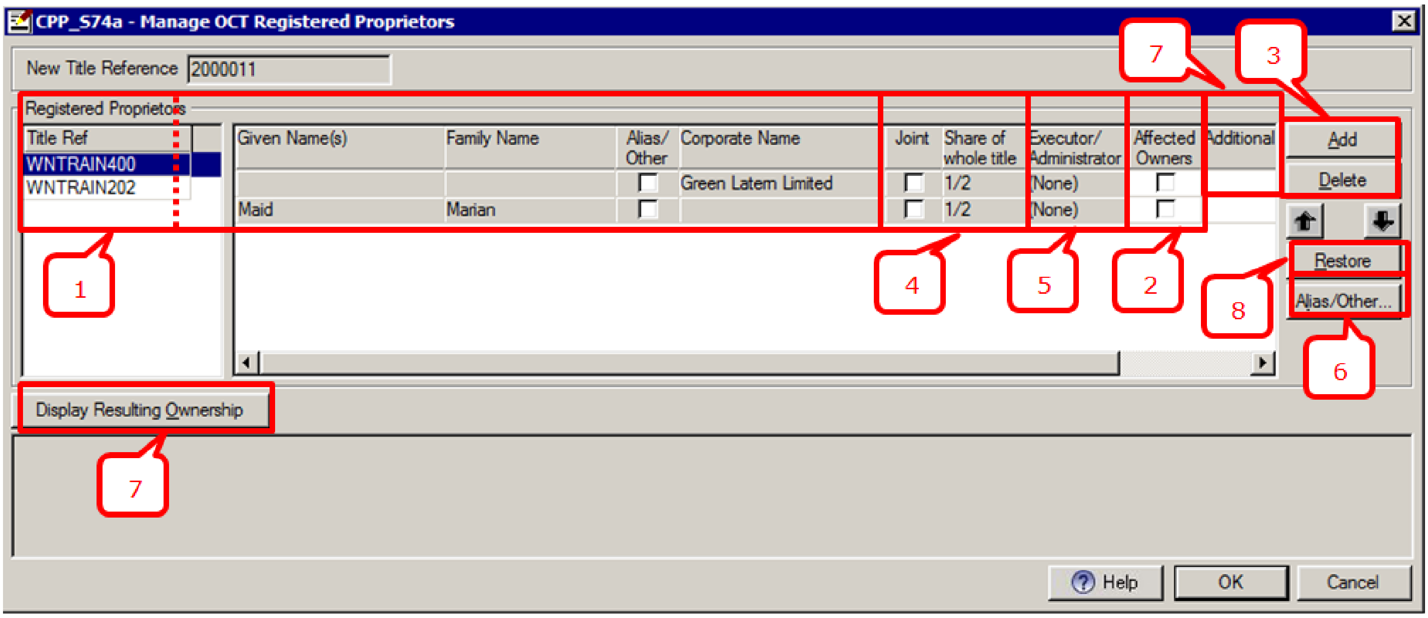
- Head Titles have been linked correctly and
- Prior Transfers have been set up correctly (e.g. against the correct Head Title and have correct spelling)
- Note - Refer to section 1 for more detail

If new names are required (e.g. when there is no Head Title – such as for a Gazette Notice), then use the following process:

1. Highlight the New Title you wish to add proprietors to, then
2. Click Edit Names in the Prepare Order for Certificate of Title screen:

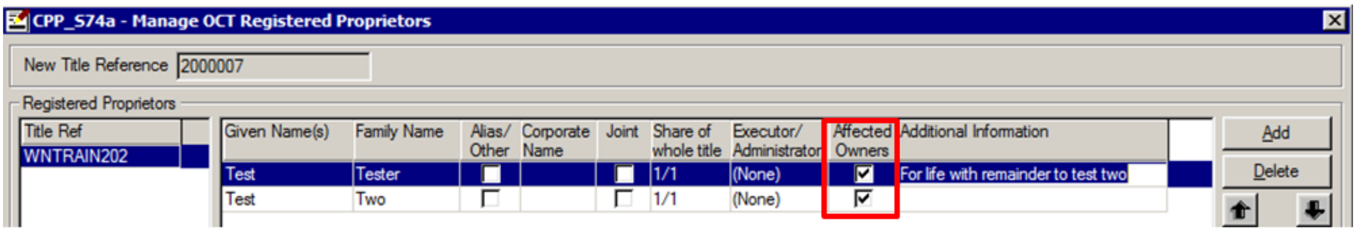


This opens the "Manage Register Proprietors" screen:



A summary of the main features from the above screen is as follows:

1. If multiple head Titles, select a Title in the **Title Ref** box to display proprietors relating to that Title. E.g. Green Lantern Limited and Maid Marian are the owners of CT WNTRAIN400
2. Check the **Affected Owners** checkboxes to select which proprietors you wish to display on the Title

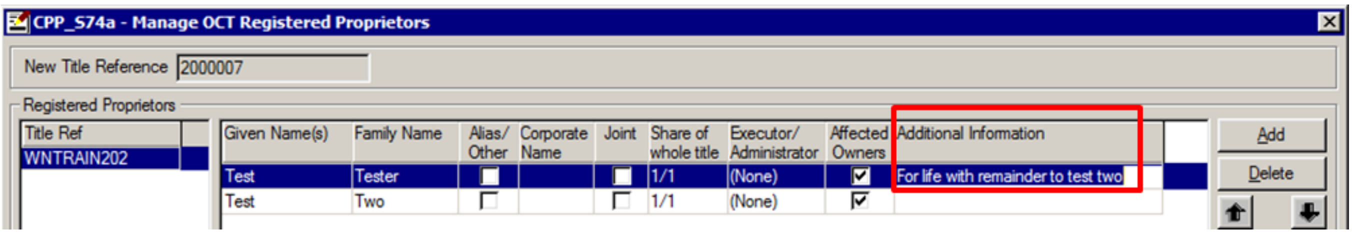


3. New proprietors can be added or removed by clicking the **Add** or **Delete** buttons (if required)
   - *Note* – the process of adding proprietors to a title is not a means of getting names on a title without a Transfer – it is purely for getting the correct owners on the correct titles if need be. E.g. if there is a prior image instrument such as a TPS.
   - If the names are not in right order use the **Up** or **Down** buttons

*****Note - Only new names that have been Added by a user can be edited*****

4. Check the **Joint** Checkbox and enter fractions in the **Share of whole title** fields to enter shares (see section 5)
5. Select Executor or Administrator from the **Executor/Administrator** drop down list (if required)
6. Click **Alias/Other** to add or edit details of an alias, name suffix or minor information (if required)

7. **Additional Information** relating to a registered Proprietor can be entered (if required). E.g. for Life Estates:



8. To re-display registered proprietors after making changes, click **Restore**

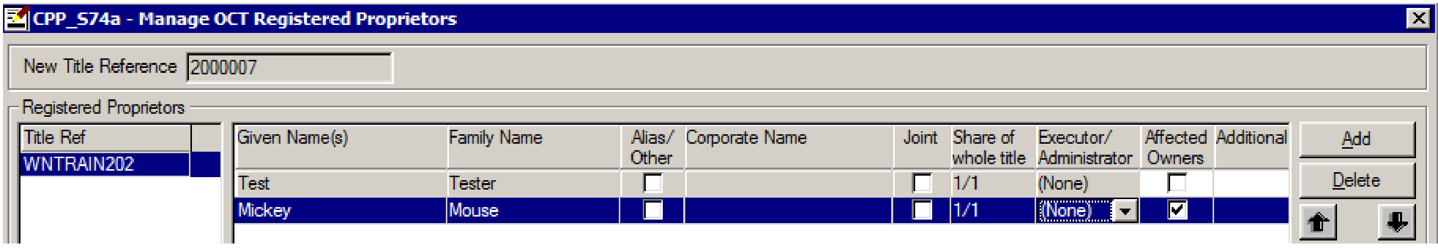
9. Click **Display Resulting Ownership** to generate the resulting proprietors and display the ownership details in the text field below:

5. Proprietorship Options (Sole Tenants, Shares and Combination Tenancies)

In essence, adding proprietors and shares in the “Maintain Registered Proprietor” screen is the same as setting up a Transfer. The main scenarios are as follows:

Sole Proprietor

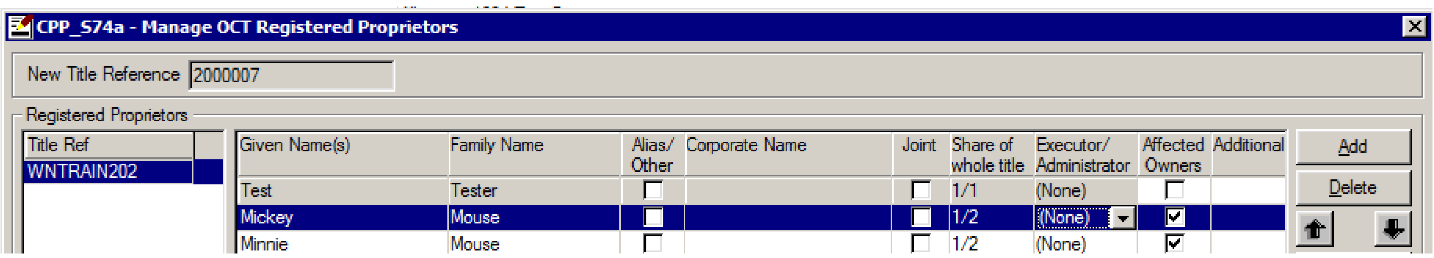
You enter a new sole proprietor in the Manage Registered Proprietors screen as follows:



1. Uncheck the default proprietor (Test Tester) as an Affected Owner
2. Click “Add” and add a new proprietor (Mickey)
3. Check Mickey as an Affected Owner

Shares

You enter tenants in common (e.g. two ½ shares) in the Manage Registered Proprietors screen as follows:

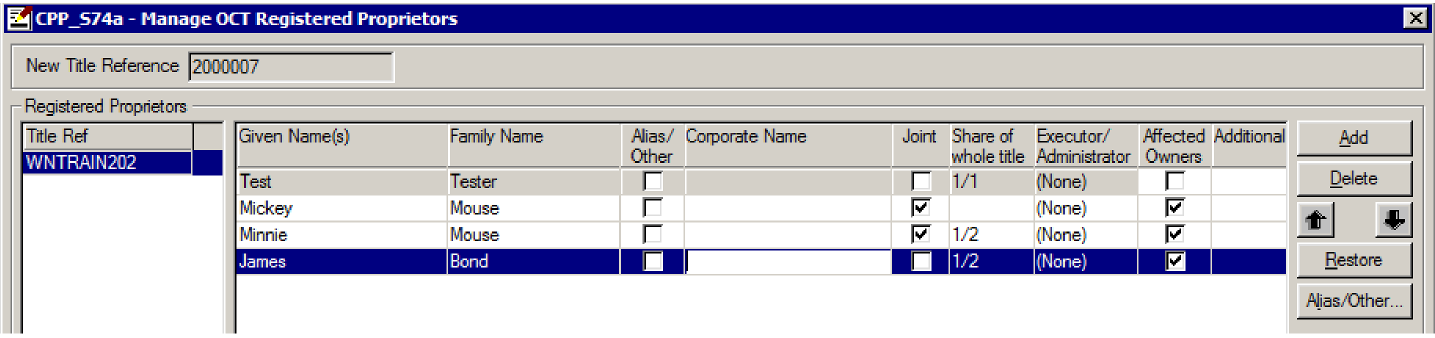


1. Uncheck the default proprietor (Test Tester) as an Affected Owner
2. Click “Add” and add two new proprietors (Mickey and Minnie)
3. Enter a ½ share for each proprietor in the “Share of whole Title” field
4. Check both Mickey and Minnie as Affected Owners

Combination Tenancy

A combination proprietorship contains joint tenants and tenants in common.

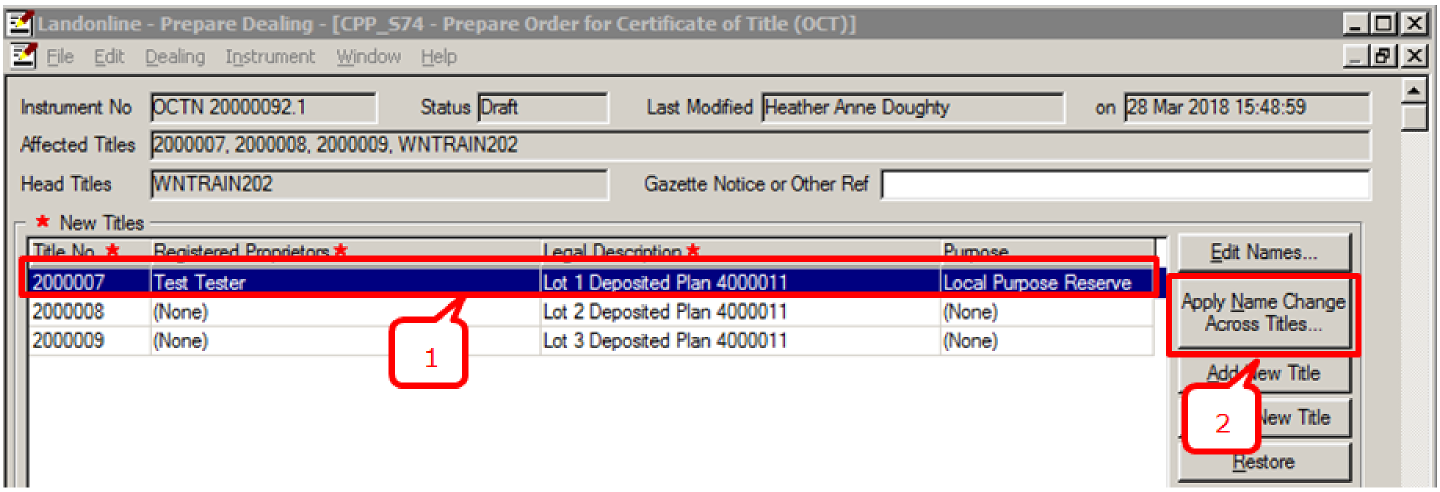
For example, Mickey and Minnie own a ½ share as joint tenants and James Bond owns the other ½ share, making one whole share. You enter these combination tenants in the Manage Registered Proprietors screen as follows:



1. Uncheck the default proprietor (Test Tester) as an Affected Owner
2. Click “Add” and add three new proprietors (Mickey, Minnie and James Bond)
3. Check Joint for both Mickey and Minnie
4. Enter ½ for Minnie and James (Mickey does not have a ½ share entered)
5. Check Mickey, Minnie and James as Affected Owners

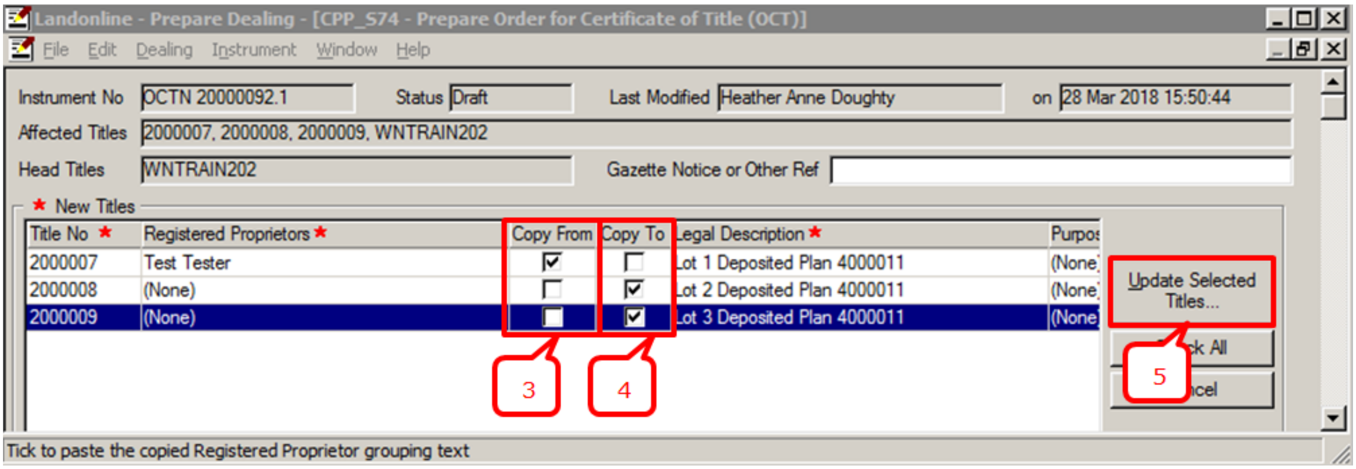
6. Applying Name Changes to Multiple Titles

Once proprietors have been added or selected in the “Prepare Order for Certificate of Title” screen (as covered in sections 3 and 4) – they can be applied to other new Titles by using the following process:



1. Select or add a new proprietor in the Prepare Order for Certificate of Title screen (as covered in sections 3 and 4)

2. Click **Apply Name Change Across Titles** (“Copy from/Copy to” view displays):



3. Check the **Copy From** checkbox for the title you wish to copy from

4. Check the **Copy to** checkboxes for titles you wish to copy to

5. Click the **Update Selected Titles** button to update the Titles as required

7. Transition

OCT Instruments created before the 3.17 release (but not submitted) can still be submitted from Workspace.

In progress OCT Instruments that were lodged before the 3.17 release will still be processed by LINZ.

8. Known Issues

T058 & T059 fail for pending titles Created by OCTN

Following the 3.17 release, both T058 and T059 incorrectly fail at the Pre-validation and Submit stages of a Dealing for Transfers/Mortgages affecting Pending Titles Created by an OCTN in the same Dealing, **when**:

- The Transfer/Mortgage has been prepared with Change due to Pending Dealing mode, **and**
- Share/interest or Part of Land/Complex mode has been selected, **and**
- Mortgagors/Encumbrancers or Transferors/Registered Proprietors **are correct**:

Note - In most cases business rules T058 and T059 will pass.

An example of T059 failing is as follows:

- Mortgagors/Encumbrancers or Transferors/Registered Proprietors **are correct**:

Note - In most cases business rules T058 and T059 will pass.

An example of T059 failing is as follows:

Pre-validation Report

Instrument No	20000100.2
Validated	29/03/2018 13:18

Instrument	Reason	Failure/Warning	Rule
T 20000100.2	Computer Register(s) 2000017 has/have a status of Pending. The title(s) must have a status of "Live" or "Part Cancelled" to enable registration.	Warning	T006
T 20000100.2	T 20000100.2: This will step down to Lodge for the issue of new titles	Warning	T032
T 20000100.2	T 20000100.2: The transferor(s) and or their share/interest(s) do not match all the proprietors of title(s) 2000017. If there is a prior Image Only instrument in this dealing that changes ownership, details must be updated to match otherwise continue with processing.	Warning	T059

Workaround

If the Mortgagors/Encumbrancers or Transferors/Registered Proprietors are correct - T058/T059 can be ignored at both the Pre-validation and Submit stages of a Dealing and you can continue to submit.

Workaround

If the Mortgagors/Encumbrancers or Transferors/Registered Proprietors are correct - T058/T059 can be ignored at both the Pre-validation and Submit stages of a Dealing and you can continue to submit.

Plan Status to be shown in Workspace Dealings

LINZ Ref: LOLCM-634

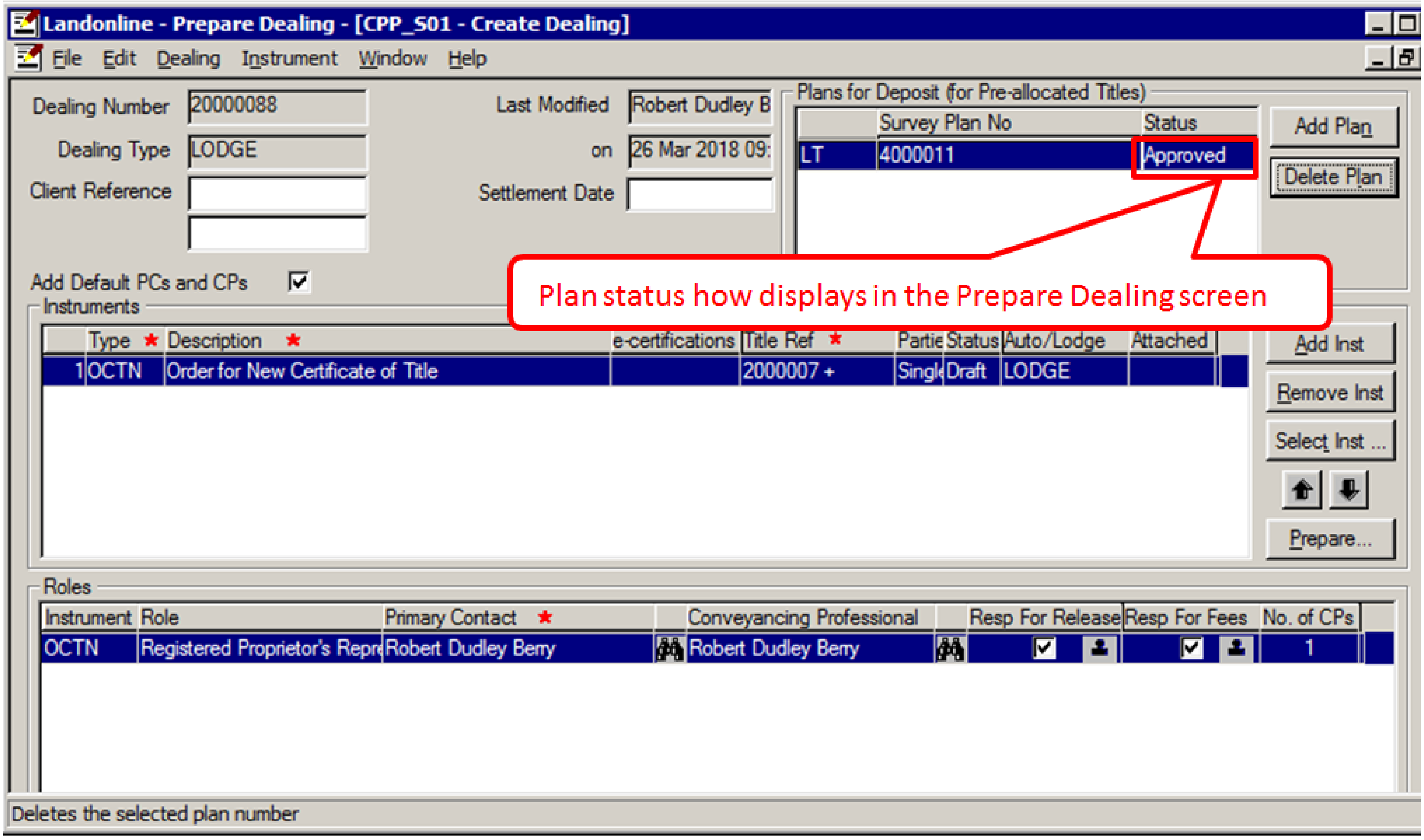
Description: Functionality to show plan statuses in the Prepare Dealing screen.

Functionality to show plan statuses in the Prepare Dealing screen.

Following the 3.17 release, the below plan statuses now display when an LT plan is added to a dealing:

- Submitted
- Requisitioned
- Approved
- Withdrawn*
- Not for Deposit*

**Note*– It is not possible to add a “Withdrawn” or “Not for Deposit” plan into a Workspace Dealing. However, it is possible for a Submitted/Requisitioned/Approved plan added to a Dealing to be subsequently Withdrawn or set to Not to Deposit.



Warning and Business Rule when Initiated Plan added to Workspace Dealing

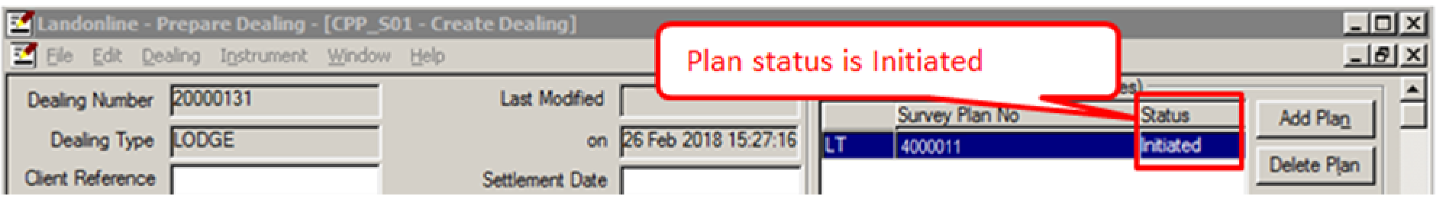
LINZ Ref: LOLCM-634

Description:

1. **Business Rule for Dealings Containing Initiated plans**
2. **Warning message when EI/OCTN Instrument in Dealing containing a plan that is not Approved as to Survey is prepared**

1. Business rule for Dealing Initiated Plans

Dealings containing Initiated Plans are sometimes Lodged with LINZ:



The process is for LINZ staff to reject these Dealings if:

- A Fast Track request has not been lodged and the Plan still has a status of Initiated, or

- A Fast Track request has been lodged, but the Plan has not been submitted within a 24 hour period of the Dealing being submitted

To reduce the number of Rejections, the following business rule now runs in Workspace when a Dealing containing an Initiated Plan is either Pre-validated or Submitted:

Landonline

Toitu te Land whenua Information New Zealand

Pre-validation Report

Instrument No 20000131.1

Validated 26/02/2018 15:28

Instrument	**Reason**	**Failure/Warning**	**Rule**
OCTN 20000131.1	LT 4000011 only have/has a status of initiated	Warning	T202

***** End of Report *****

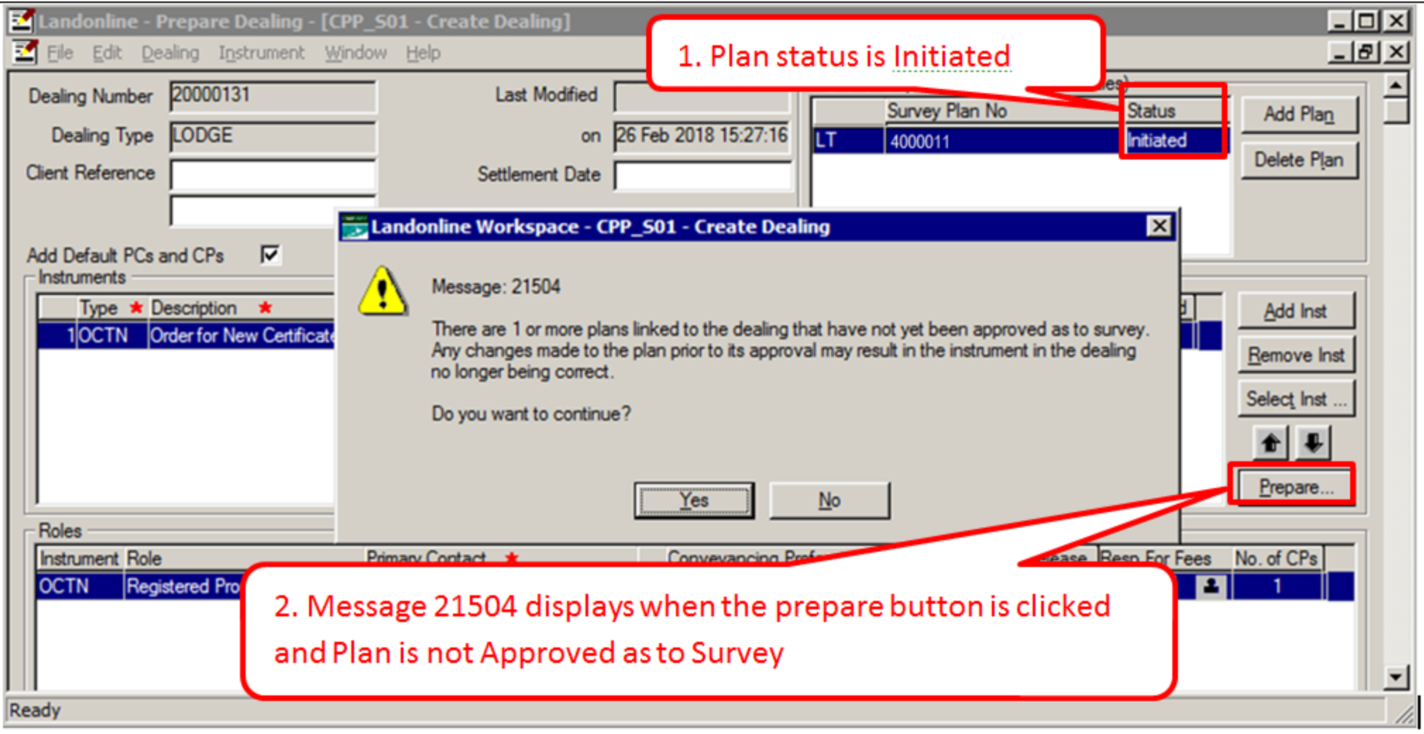
Note – As this is only a warning and to allow for the Fast Track process, Dealings can still be submitted to LINZ when the above business rule has failed.

2. Warning message when EI/OCTN Instrument in Dealing containing a plan that is not Approved as to Survey is prepared

Plans that are not yet Approved as to Survey are subject to change. As a consequence, any changes made to a plan prior to its approval may result in prepared Instruments no longer being correct.

For example, an Easement Instrument prepared prior to plan approval may become incorrect if Easements on the plan change (e.g. Easement types or markings etc…).

As a heads up - the below warning message now displays when a user attempts to prepare an OCTN or EI Instrument in a Dealing containing a Plan that is not Approved as to Survey:



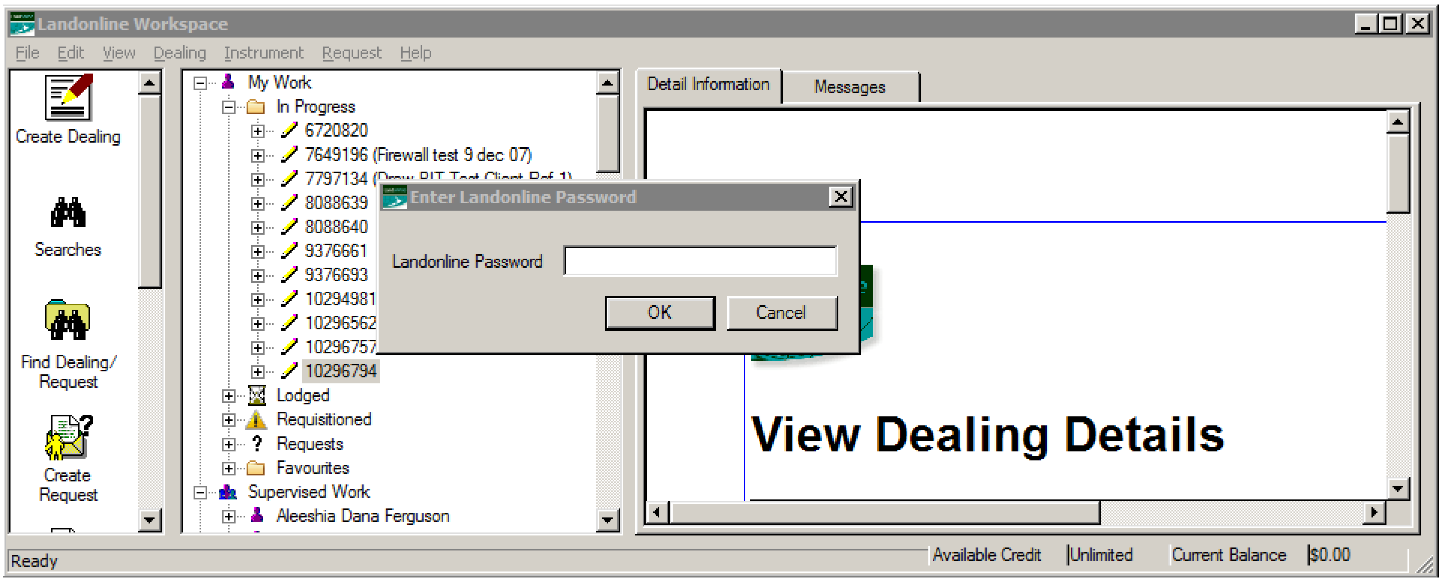
Make the deletion of e-Dealings from Workspace more robust

LINZ Ref: LOLCM-626

Description: When deleting a Dealing from Workspace, users are now required to also enter their password to confirm the delete action.

Prior to the 3.17 release, there were several cases of users accidentally deleting an e-Dealing in Workspace.

Following the 3.17 release, users are now prompted to enter their Landonline Password when deleting an e-Dealing:



This only applies to deleting dealings – you will not need to enter your password if you are only deleting an instrument from a dealing.

Warning message when released Instrument (in a Dealing on Requisition) is opened

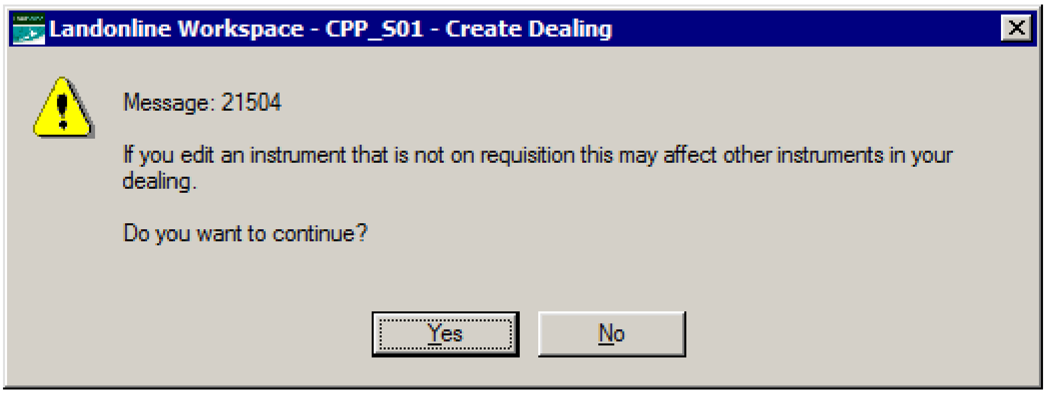
LINZ Ref: LOLCM-749

Description: A warning message now displays when a non-Requisitioned Instrument is edited in a Requisitioned Dealing.

When a Dealing (with multiple Instruments) is on Requisition, Workspace users occasionally make changes to Instruments that were not Requisitioned.

Although users are well within their rights to make changes to these Instruments - occasionally the wrong Instrument is edited.

As a heads up, users will now receive the following message when trying to edit an Instrument that is NOT on Requisition:



Last Updated: 16 April 2018