

Surrogate Digital Service (SDS)

Lawyer & Legal Assistant user guide

Surrogate Digital Service is:

- Found at: surrogate.alberta.ca
- Able to process most grant applications. See [What does SDS Accept?](#) for details
- Available for use province-wide by
 - Lawyers and their assistants,
 - Surrogate clerks and Judicial assigners
 - King's Bench Justices
 - The Public Trustee
- Mandated for use by lawyers for grants the service can process as of [September 13, 2022](#) and [November 17, 2023](#).
- Not available for use by self-reps.

For support, contact: jsg.surrogatesupport@gov.ab.ca

Key features of Surrogate Digital Service (SDS)

- **File Numbers:** Applications submitted via the service are assigned file numbers in the format DES-1234567, which are automatically assigned by the service when a clerk completes their review (NOT at the time of submission to the Court).
- **CASES entry:** Clerks do not enter SDS application information into CASES. SDS applications are found only in SDS - they do not appear in CASES.
- **SharePoint and printing:** Applications received via SDS are not found in SharePoint, and are not printed.
- **Payment:** Occurs online by credit card at the time counsel submits the application for Court review (NOT at the time the Grant is issued). Payment is processed by SDS and does not require clerk involvement.
- **Notice to Beneficiaries and other interested parties, including the Public Trustee:** Notices are automatically served digitally after clerk approval. Counsel can serve by alternative methods if a beneficiary or potential claimant doesn't have email.

Streamlined clerk involvement:

- **Application review:** SDS only displays information necessary for the clerk's review. It does not display information that the clerk is not responsible for reviewing, even if that information has been collected.
- **Review stages:** The clerk review has been divided into two stages. Stage 1 includes a very limited number of reasons for a clerk to reject an application. In stage 2, clerks can point out application deficiencies for a Justice.
- **Grants:** Grants are automatically created and distributed by SDS. Clerks are not involved in preparing or distributing Grants. After a clerk has reviewed and accepted an application, they do not see it again.

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Account creation and management

Accounts in the Surrogate Digital Service are granted to **individuals** within Law Firms. There is no consolidated team or admin account. Each person that uses the service must create their own account.

There are two types of Surrogate Digital Service accounts:

- Lawyer accounts
- Legal Assistant accounts

Be sure to select the correct role when creating your account.

Students at Law

Law students should create a **Legal Assistant** account. After acquiring a valid Bar ID, you can create a lawyer account. Make sure to complete any “in progress” applications before doing so, as they will not move over to your new account.

▲ If you move to a different law firm

- **DO NOT** create a new account. Update the email address associated with your existing account.
- Sign in to the old account > Click on your name in the upper right and select My Account. In the Contact Info panel click Change Email. You must verify the new address by email.

▲ If you already have an account with a different Justice Digital Service:

- **DO NOT** create a new account. You must access all Justice Digital Services* with a single account.
- Sign in with the same email and password you use for your existing account.
- You will be prompted to complete account set up for access to Surrogate Digital Service
- Step-by-step instructions are available in this guide

Other Justice Digital Services include:

- Adjournment Digital Service (ADS)
- King's Bench Court Case Management (CCM) — Commercial List
- King's Bench Filing Digital Service (FDS) — Civil
- King's Bench Filing Digital Service (FDS) — Family & Divorce
- Transcripts Digital Service (TDS)

Lawyer accounts

Launch Surrogate Digital Service (surrogate.alberta.ca/) in a browser (Chrome is recommended, but not required) and click “Create an account”. Answer the questions in the popups and proceed to the Create Account screen.

1. **Enter your name and email** and create a password. Please use your email address associated with your law firm.
2. **Validate your email address**
 - a. You will receive an email containing a verification link to click. This link expires after 5 minutes, so you should complete this step right away.
3. If your verification link expires, you can sign into the digital service and request a new verification email.
4. Once your email address has been verified, you’ll be asked to identify your Legal Capacity.
 - a. There are different verification requirements for Lawyers and legal assistants. **Be sure to select the correct legal capacity for the account you are setting up.**
 - b. Lawyers need:
 - i. Your Law Firm name and location. Start typing the name of the firm and a list of matching firms will appear. Select the firm for your location.
 - ii. Your Bar ID

Add email to your list of safe senders: To ensure you reliably receive emails from the digital service, add the following email address to your list of safe senders:

support.justicedigital@gov.ab.ca

1

Create Account

First name

Last name

Email

Password

Your password

- must have at least 12 characters
- must have at least 1 numerical digit
- must have at least 1 uppercase letter
- can't contain part of your username / email address

Confirm password

[Back](#) [Create an Account](#)

2

Sign In

⚠ You need to verify your email address to activate your account.

An email with instructions to verify your email address has been sent to you.

Haven't received the email?
[Click here](#) to re-send it.

3

Sign In

ⓘ Action expired. Please start again.

Email

Password

Remember me [Forgot Password?](#)

[Sign In](#)

4

Legal capacity

Name of user
Jenni Sidey-Gibbons
Email address
lunar.jenni@yahoo.com

Role

I am a legal assistant, paralegal or student at law

I am a lawyer

Law firm or agency

Bar ID

Law firm and lawyer information is verified against the Law Society of Alberta (LSA) membership directory (as of Jun 13, 2022). If you are unable to locate your firm, please contact jsg.surrogatesupport@gov.ab.ca for support.

[Continue](#)

Legal assistant accounts

Launch Surrogate Digital Service (surrogate.alberta.ca/) in a Chrome browser and click “Create an account”. Answer the questions in the popups and proceed to the Create Account screen.

1. **Enter your name and email**, and create a password. Please use your email address associated with your law firm.
2. Validate your email address
3. You will receive an email containing a verification link. This link expires after 5 minutes, so complete this step right away.
4. If your verification link expires, you can sign into the digital service and request that a new email.
 - a. Once your email address has been verified, you’ll be asked to identify your Legal Capacity.
 - b. There are different verification requirements for Lawyers and legal assistants. **Be sure to select the correct legal capacity for the account you are setting up.**
 - c. You will need:
 - i. The Law firm name and location for the lawyer you will request filing permission from. Start typing the name of the firm and a list of matching firms will appear. Select the firm for your lawyer’s location.
 - ii. Name of the Lawyer you will create requests for. From the dropdown menu, select the name of the lawyer you need permission from. The lawyer will receive an email to notify them when you’ve requested access.

Add email to your list of safe senders: In order to ensure you reliably receive emails from the digital service, add the following email addresses to your list of safe senders: surrogate.digital.service@gov.ab.ca and support.justicedigital@gov.ab.ca

The image displays four sequential screenshots of the user interface for creating and signing into a legal assistant account. Screenshot 1, titled 'Create Account', shows input fields for 'First name', 'Last name', 'Email', and 'Password'. The password field includes a list of requirements: at least 12 characters, at least one numerical digit, at least one uppercase letter, and no part of the username or email address. A 'Confirm password' field is also present. 'Back' and 'Create an Account' buttons are at the bottom. Screenshot 2, titled 'Sign In', shows a warning message: 'You need to verify your email address to activate your account.' Below it, a message states 'An email with instructions to verify your email address has been sent to you.' and a link to 'Click here to re-send it.' Screenshot 3, also titled 'Sign In', shows a message: 'Action expired. Please start again.' Below this are fields for 'Email' (containing 'lunar.jenni@yahoo.com') and 'Password'. There are 'Remember me' and 'Forgot Password?' options, and a 'Sign In' button. Screenshot 4, titled 'Legal capacity', shows a summary of the user's information: 'Name of user: Jenni Sidey-Gibbons', 'Email address: lunar.jenni@yahoo.com'. Under 'Role', the radio button for 'I am a legal assistant, paralegal or student at law' is selected. There are two dropdown menus for 'Law firm or agency' and 'Lawyer'. A note at the bottom states: 'Law firm and lawyer information is verified against the Law Society of Alberta (LSA) membership directory (as of Jun 13, 2022). If you are unable to locate your firm, please contact jsg.surrogatesupport@gov.ab.ca for support.' A 'Continue' button is at the bottom.

NOTE: You can request permission from as many lawyers as you need. On this step you will select only one lawyer to get started. After completing this step, you can request permission from additional lawyers. See the next page for details.

Legal assistants: requesting access from lawyers

You can request permission from as many lawyers as you need. When you request permission, the lawyer will receive an email to notify them of your request.

1. To request permission from additional lawyers, click on your name and select “Manage access”.
2. On the **Manage access** page, click “Request access”.
3. That will open a “Request access” page.
 - a. Start typing the name of the firm, give it a few seconds, and a list of matching firms will appear. Select the firm for your location.
 - b. From the dropdown menu, select the name of the lawyer you need permission from.

The screenshot shows the 'My account - Legal assistant, paralegal or student at law' page. The user is logged in as Perry Mason. The 'Manage access' menu item is highlighted with callout 1. The 'Request access' button is highlighted with callout 2. The 'Request access' modal is open, showing the user's name (Jenni Sidey-Gibbons) and email address (lunar.jenni@yahoo.com). The modal has a 'Law firm or agency' field with callout 3, a 'Select the lawyer to file on behalf of' dropdown, and a 'Continue' button. Below the modal, there are sections for 'Pending access requests' and 'Granted access'. The 'Pending access requests' table has one entry for Jane Smith, requested on Sep 19, 2022. The 'Granted access' table is empty, and a message states 'No access has been granted'.

Alberta Surrogate Digital Service

Dashboard Help Perry Mason

My account

Manage access

Logout

My account - Legal assistant, paralegal or student at law

Legal assistants can gain access to create and manage filing requests on behalf of one or more lawyers who have Bench Surrogate Digital Service. To gain access, you must initiate the request below. Lawyers will be notified by email regarding your request and must sign in to their accounts to approve your request.

Please note: any requests you create on behalf of a lawyer will be visible by the lawyer on their dashboard. You will NOT have access to view requests created or submitted by other lawyers.

Request access

Pending access requests

Name	Requested on
Jane Smith	Sep 19, 2022

Granted access

Name	Approved on
------	-------------

No access has been granted

Request access

Name of user
Jenni Sidey-Gibbons
Email address
lunar.jenni@yahoo.com

Law firm or agency

Type, then select

Select the lawyer to file on behalf of

Type or select

Law firm and lawyer information is verified against the Law Society of Alberta (LSA) membership directory (as of Sep 18, 2022). If you are unable to locate your firm, please contact jsg.surrogatesupport@gov.ab.ca for support.

Continue

Lawyers: adding or revoking legal assistant access

You can delegate legal assistants to create, edit or file grant applications on your behalf. The assistant must first create an account and then initiate the request for permission. You will receive an email to notify you when your legal assistant(s) request access. You can grant permission to as many assistants as you need.

1. If a legal assistant has requested filing permission, you will see a “Pending access request” banner on your dashboard. Click on the **Manage access** link to go to the page where delegates can be managed.
2. You can also click on your name, then select “Manage access” to see the page at any time.
3. To grant access, simply click “Approve”. If you don’t want to grant access click “Deny.”
4. If you’ve granted permission to an assistant, you can revoke it at any time by clicking “Revoke”.

The screenshot shows the 'Law Firm Dashboard' with the Alberta Surrogate Digital Service logo. The user is logged in as 'Perry Mason'. A yellow banner at the top indicates a 'Pending access request' with a callout '1' pointing to the banner text: 'Go to [Manage access](#) to approve or deny requests to file on your behalf.' A user menu is open, showing 'My account', 'Manage access' (highlighted with a callout '2'), and 'Logout'.

The screenshot shows the 'Manage access - Lawyer' page for 'Clark Clerk'. It includes a header with the Alberta Surrogate Digital Service logo and navigation links for 'Dashboard', 'Help', and 'Clark Clerk'. The page contains a section for 'Pending access requests' with a table and a '3' callout pointing to the 'Approve' button. Below that is a section for 'Approved delegates' with a table and a '4' callout pointing to the 'Revoke' button.

Name	Requested on	Actions
Gene Cernan	Mar 24, 2023	Approve Deny

Name	Approved on	Actions
Jenni Sidey-Gibbons	Mar 10, 2023	Revoke

Lawyers: assign a file to a legal assistant

For any application that lawyers are responsible for, there is an option to add, remove, or change the assigned legal assistant.

1. Open the application, and click “More Options”.
2. Select the legal assistant you want to assign the application to.

The legal assistant must already be granted permission to file applications on your behalf. (see [Requesting access from lawyers](#))

Permissions and visibility

SDS has security features to ensure that people only see or change applications when they are authorized to do so.

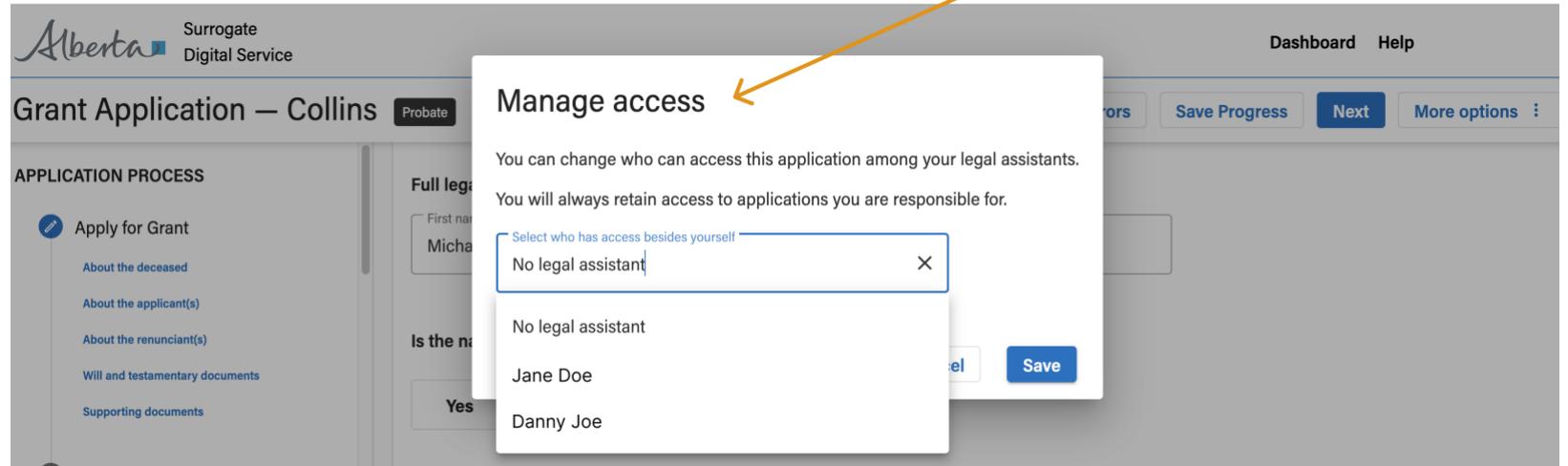
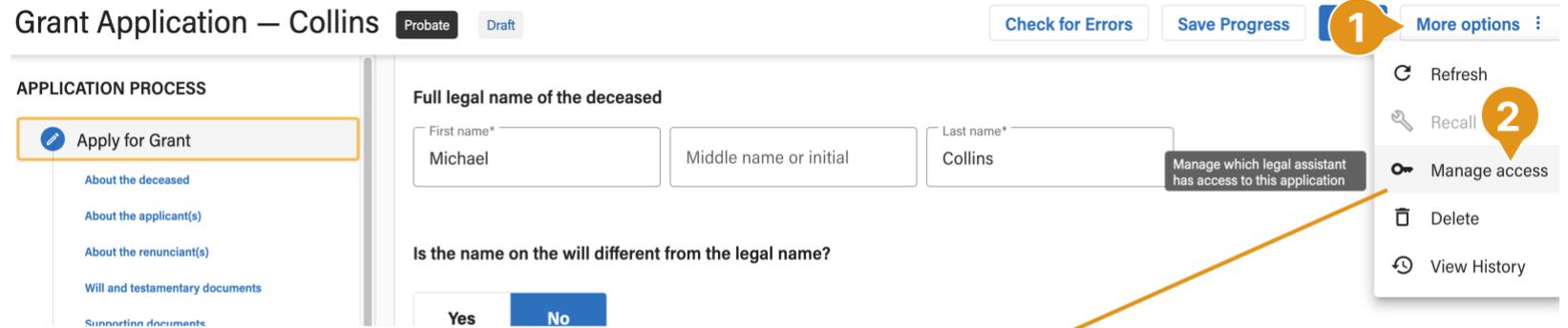
Lawyers can:

- Grant, change or revoke access for legal assistants who work on applications on their behalf.
- See all applications made on their behalf, whether they are started by a legal assistant or by the lawyer themselves.
- Grant a legal assistant access to an individual application started by the lawyer or another legal assistant.

Legal assistants can:

- View and edit all applications that they start.
- View and edit applications that a lawyer has assigned to them.
- A legal assistant cannot see applications created by a different legal assistant and cannot assign applications to other legal assistants.

For more information about permissions, see [Account creation](#).



Application statuses and wait times

Applications in SDS move through a standard series of steps. At each step, an application requires action from a different person or people in the process.

Application status	What you're waiting for	Expected wait time	Actions you can take
Draft	<ul style="list-style-type: none"> Completion of the application. 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> You can edit any part of the application. You can request certification from the applicant and people renouncing or nominating digitally. When you request certification, digital Renunciations and Nominations (if any) are emailed and completed before the applicants are emailed a request to certify the application.
Pending Certification	<ul style="list-style-type: none"> Completion of digital Renunciations or Nominations, if any. Applicant certification. 	<ul style="list-style-type: none"> It depends on how quickly people respond to their email notifications. 	<ul style="list-style-type: none"> If you discover an error, you can "Recall" the application to make it fully editable. The applicant could also return the application to you if they discover an error.
Ready To Submit	<ul style="list-style-type: none"> You need to open the application, pay the fee, and submit to the Court. 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Pay and submit. If you discover an error, you can "Recall" the application to make it fully editable.
Submitted	<ul style="list-style-type: none"> Clerk review. 	<ul style="list-style-type: none"> Normally, within 24-48 hours. This may vary. 	<ul style="list-style-type: none"> If you discover an error, you can "Recall" the application to make it fully editable. If the application status is "In review" you cannot recall it.
Rejected by clerk	<ul style="list-style-type: none"> You must revise the application and resubmit. 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> You can edit any part of the application. You have the option to type a response to the clerk before resubmitting. The application must be re-certified by the applicant when you resubmit.
Pending Service	<ul style="list-style-type: none"> Beneficiaries and potential claimants to open the notices they've received by email. 	<ul style="list-style-type: none"> It depends on how quickly people respond to their email notifications. Service to the Public Trustee normally takes two weeks or less. This may vary. 	<ul style="list-style-type: none"> If you discover an error, you can "Recall" the application to make it fully editable. Notices to everyone except the Public Trustee expire after 72 hours. If someone hasn't clicked on the email link to complete service within that time, you can resend the notice or arrange for alternate service. The notice to the Public Trustee does not expire. They will respond as time permits. If you experience an extended delay from the Public Trustee, contact them, not SDS support. SDS support has no influence over Public Trustee reviews.
Pending Final Decision	<ul style="list-style-type: none"> Assignment to a Justice and Justice review. 	<ul style="list-style-type: none"> Normally, three weeks or less. There can be significant variation in Justice response times. 	<ul style="list-style-type: none"> None. SDS has automated processes to follow up on applications that have been waiting for three weeks or more. Do not SDS contact support with questions about delays unless you have an urgent need, such as for a pending property sale.
Seeking Clarification	<ul style="list-style-type: none"> The reviewing Justice has asked a question that you need to respond to. 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Respond to the Justice's question. You can upload supporting documents if needed but you cannot edit the application.
Rejected by Justice	<ul style="list-style-type: none"> The reviewing Justice has rejected your application and requested changes. 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Update the application as requested and provide a response to the Justice. You can edit any part of the application. The application must be re-certified by the applicant and notices re-served when you resubmit.

Dashboard

Status of applications

Your application will normally flow through the following statuses:

1. **Draft:** the application is in progress, prior to seeking applicant certification
2. **Pending Certification:** the application has been sent to the applicant(s) for certification
3. **Ready to Submit:** the application has been certified by applications and can now be submitted to the Court with payment
4. **Submitted:** the application is pending review by a Surrogate clerk
5. **Pending Service:** the application has been approved by a Surrogate clerk and digital notices to beneficiaries and interested parties have been generated. Non-digital notices are pending.
6. **Pending Final Decision:** service has been completed and the application is pending review by a Justice
7. **Approved**
8. **Draft, Pending Certification, OR Pending Service: Amended Inventory:** if the application issued a grant with an incomplete inventory, the inventory can be amended, certified by applicant(s), then served to interested parties.

In some scenarios, an application could be in one of the following statuses:

9. **Returned by Clerk:** the application did not pass the initial clerk review. Revisions are required to be fore resubmission.
10. **Seeking Clarification:** The Justice has a question that can be answered without making changes to the application. You can reply with a message as well as an uploaded document, if required.
11. **Rejected by Justice:** The Justice will provide rejection reasons. The application must be revised as directed before re-submission.
12. **Halted:** a caveat or conflicting application has been found by the Court.

Law Firm Dashboard

Manage applications and view historical transactions.

New application

Applications

Wills, estates & trusteeships

Date modified ↓	Lawyer file no.	File number	Applicant(s)	Deceased	Status ▾
Mar 7, 2024	---	DES-0001823	Licant, Abe	Deadman, Guy	1 Draft
Mar 7, 2024	---	DES-0001745	Rothko, Mark	Hopper, Edward	2 Pending Certification
Mar 6, 2024	---	DES-0000705	Feinman, Richard	Einstein, Albert	3 Ready To Submit
Mar 6, 2024	---	DES-0001002	Licant, App	Intestacy, Partial	4 Submitted
Mar 4, 2024	---	DES-0001605	Lafleur, Cheri	Lafleur, Guy Admin	5 Pending Service
Mar 4, 2024	---	DES-0001597	Aldrin, Edwin	Collins, Michael Partially-Intestate	6 Pending Final Decision
Mar 4, 2024	---	DES-0001567	Aldrin, Edwin	Collins, Michael Probate	7 Approved
Mar 1, 2024	---	DES-0001801	Olsen, Peggy	Draper, Don	8 Draft: Amended Inventory
Feb 27, 2024	---	DES-0001513	Shepard Jr., Alan	Shephard, Alan	9 Rejected by clerk
Feb 27, 2024	---	DES-0001409	Aldrin, Edwin	Collins, Michael	10 Seeking Clarification
Feb 23, 2024	---	DES-0001781	Tereshkova, Valentina	Collins, Michael	11 Rejected by Justice
Feb 23, 2024	---	DES-0001780	Horne, Alex	Davies, Greg	12 Halted

Dashboard organization

The dashboard displays applications in order of when they were last modified. Applications that changed most recently will display at the top. A change could be an edit to the application content, or it could be a change in status.

You can filter the dashboard by application status. This may help you find specific applications more easily.

1. Click the Filter icon to open a window
2. Select the statuses you want to view
3. Active filters display above the dashboard

Applications
Wills, estates & trusteeships

Approved Approved: Amended Inventory

Date modified ↓ **Lawyer file no.** **File number** **Applicant(s)** **Deceased** **Status**

Date modified	Lawyer file no.	File number	Applicant(s)	Deceased
Feb 23, 2024	--	DES-0001410	Draper, Sally	Draper, Don
Jan 19, 2024	--	DES-0001605	Kellman, Gerri	Roy, Logan
Jan 17, 2024	--	DES-0001597	Flintstone, Wilma	Flintstone, Fred
Jan 17, 2024	D44761	DES-0001567	Jimenez, Shayne	Clements, Heather A
Jan 17, 2024	6A5B10	DES-0001172	Hudson, Garth	Robertson, Robbie
Jan 17, 2024	76FB36	DES-0000817	Simpson, Homer J	Flanders, Ned
Jan 15, 2024	371A19	DES-0001034	Ortiz, Barbara	Kirby, Paul I
Jan 8, 2024	PT-TEST	DES-0001137	Roy, Siobahn	Roy, Logan
Aug 14, 2023	FB70E0	DES-0001146	Simpson, Marge	Simpson, Homer J

Status [Clear](#)

- Approved
- Approved: Amended Inventory
- Draft
- Draft: Amended Inventory
- Halted
- In Review
- Pending Certification
- Pending Certification: Amended Inventory
- Pending Final Decision
- Pending Renunciation
- Pending Service

Creating a new application

1. To create a new application, click the “New application” button in the top-right of the dashboard.
2. SDS will accept most probate, administration and administration with will annexed applications. Each time you start a new application you must answer a series of screening and eligibility questions.
3. The initial questions will determine the type of grant you are applying for. Be sure to answer these questions correctly, as **you cannot change the application type later**.
4. After SDS has determined the grant type, you will be presented with an additional set of screening questions. These questions determine if SDS can process your application. This ensures that you don't create an application that SDS cannot process. Be sure to answer these questions correctly. If an application is rejected because these questions were answered incorrectly, your application will be rejected and you will not be eligible for a refund.

Which applications are accepted?

Check the [SDS homepage](#) for details about which applications are accepted.

If your application does not meet the current criteria, you must submit your application using GA forms, which can be found online:

- [Surrogate forms - Non-contentious matters`](#)

Law Firm Dashboard

Manage applications and view historical transactions.

1 [New application](#)

2 Screening questions

Select from the following options to describe your application. The deceased:

- Left a **valid will**, or one that has been validated by Court order
- Left an **invalid will**, or one that has been invalidated by Court order
- Did not leave a will

Refer to Section 14 of the [Wills and Succession Act](#) to define "will"

Is the applicant a personal representative or alternate named in the will?

Yes **No**

Does the will deal with the entirety of the deceased's estate?
e.g. the percentage of residue adds up to 100%

Yes **No**

3 **i** Your application is for a Grant of Probate

- If your application includes a will validated by Court Order, you must upload the Order as part of your application.

4 Eligibility questions

Select all that apply to your situation.

General

- This is not a request for a limited Grant.
- This is not a resubmission for a previously rejected NC/GA application.
- This is not a request for a full Grant, where a limited Grant was previously obtained using an NC/GA application.
- There is no prior Grant issued by a foreign court.
- This application does not include a void gift.

Survivorship: If the will contains a survivorship clause you may start the application, but it cannot be certified or submitted until after the survivorship period has passed.

The application process

An SDS application differs from the GA forms, but the content is fully aligned.

1. The steps required for the application process are shown in a left-side menu panel. You can navigate with these links and jump around, completing the form in any order you like.
2. Steps 1 through 5 include form fields that align with the GA forms. You can jump around these steps filling in information as you acquire it from the applicant.
3. Step 6 allows you to review your draft application and check for errors or missing information.
4. Steps 7 through 12 will become unlocked as preceding steps are completed.
5. You can click “Check for Errors” to find form fields that are incomplete.
6. You can save your progress at any time, allowing you to leave the application and return to it later.

Alberta Surrogate Digital Service

Dashboard Help Perry Mason

Grant Application – Flintstone

Admin: Will Annexed Draft

[Check for Errors](#) [Save Progress](#) [Next](#) [More options](#)

APPLICATION PROCESS

- 1 Apply for Grant
 - About the deceased
 - About the applicant(s)
 - About the nominator(s)
 - About the renunciant(s)
 - Other persons of equal or higher priority
 - Will and testamentary documents
 - Supporting documents
- 2 Beneficiaries
- 3 Potential claimants
- 4 Inventory – deceased
- 5 Inventory – jointly owned assets
- 6 Review draft and send
- 7 Certification
- 8 Submit and pay
- 9 Payment confirmation
- 10 Submit will
- 11 Serve notices
- 12 Grant approval

The deceased

Full legal name of the deceased

First name* Middle name or initial Last name*

Is the name on the will different from the legal name?

Yes No

Is the name on the death certificate different from the names above?

Yes No

[+ Add another name the deceased was known by](#)

An authorized alternate name for the deceased is one that identifies them in a legal, administrative or other official capacity, such as on a bank account or land title document. It does not include a nickname.

Last address where the deceased habitually resided

the deceased did not reside in Alberta when they died

Address 1* Address 2

Step 1: Apply for Grant

This step collects information about the deceased, applicants, and, if applicable, will and other testamentary documents.

- Add information about the deceased.
- **TIP:** To avoid rejection, be sure to add Alternate names of the deceased, when the name in the will doesn't match the name on other documents.
- Select the Judicial Centre you believe to be correct. This will be updated by the reviewing clerk, if required. Applications will not be returned if the Judicial Centre is incorrect.

Adding applicants

When you add people to an application, you only need to enter their contact information once. After being entered, people can be added to different parts of an application. For example, a person could be an applicant and a beneficiary. You only need to add the details for that person once and they can be inserted into multiple parts of the application.

1. Click on “Select an applicant” and select “Add new...”
2. Enter the applicant’s name and contact details in the popup.
 - a. **Grant of Administration** applications also require specifying the applicant’s priority to apply, in accordance with Section 13(1) of the Estate Administration Act.
 - b. If the applicant is nominated, select “not related to the deceased”
 - c. Applicants require both an email address and physical address for service. Beneficiaries and other interested parties require either an email address or address for service.
 - d. **Trust Company** applicants **must** be registered under the Alberta Loan and Trust Corporations Act.
 - e. Once saved, an applicant can be added to other sections of the application, with all the details saved.

Resource: [“What to expect as an Applicant”](#) - a guide to help applicants understand what will happen.

APPLICATION PROCESS

- 1 **Apply for grant**
 - About the deceased
 - About the renunciant(s)
 - About the applicant(s)
 - About the will
- 2 Beneficiaries
- 3 Potential claimants
- 4 Inventory — deceased

Information about the applicant

Is the applicant 18 years of age or over?

Yes No

Applicant

Select an applicant *

Add new...

on Draft Check for Errors Save Progress Next

Add Applicant

Full legal name

First name * Middle name or initial Last name *

+ Add other names known by

Email address

By adding an email address, you are not consenting that this email address can be used for service forevermore. This email address is a method to serve the applicant for this estate only by SDS.

Email *

Confirm email *

Address

At least one surviving applicant must reside in Alberta

Resides outside of Canada

Address 1 * Address 2

House number and street name E.g. apartment building, floor, etc

Cancel Save

3000, 700 9th Avenue SW
Calgary AB

Nominations

If the applicant is nominated by a person with priority to nominate:

1. In the Nominations section, click on “**Add person**”.
2. Add the person with priority who is making the nomination.
 - a. Enter the nominator’s name and contact details in the popup.
3. Add the person who is being nominated to act as the applicant.
4. A person with priority can nominate multiple.
5. You can choose from two options for adding a nomination:
 - a. **Digital nomination:** When the application is completed and you send it for certification, the nominator will receive an email notification containing a link. They simply need to click on the link and certify their intention to nominate. They will be able to download a PDF copy of the nomination for their records.
 - b. **GA13 upload:** If you prefer, you can upload a completed GA13.
6. You can add multiple nominators, if needed.

Resource: “[What to expect as a Nominator](#)” - a guide to help renunciants and nominators understand what will happen if you proceed digitally, rather than by document upload.

Nominations

Persons making a nomination must have priority among applicants. There can be more than one nominator as long as they are equally the highest priority. People who are nominating do not need to renounce.

1 + Add person

Nominations

Persons making a nomination must have priority among applicants. There can be more than one nominator as long as they are equally the highest priority. People who are nominating do not need to renounce.

The nominator

Nominator

2 Select a nominator*

Nominee

3 Select a nominee*

4 + Add Nominee

Nomination method

5 Digital nomination
 GA 13 upload

[Remove](#)

6 + Add person

Renunciations

If anyone is renouncing, you must identify them in your application.

1. In the Renunciations section, click on “**Add person**”.
2. You can also add a renunciation from the Public Trustee, if required.
3. Renunciants must be 18 years of age or over.
4. Add the person who is renouncing.
 - a. Enter the renunciant’s name and contact details in the popup.
5. You can choose from two options for adding a renunciation:
 - a. **Digital renunciation:** When the application is completed and you send it for certification, the renunciant will receive an email notification containing a link. They simply need to click on the link and certify their intention to renounce. They will be able to download a PDF copy of the renunciation for their records.
 - b. **GA11 upload:** If you prefer, you can upload a completed GA11.
 - c. Public Trustee renunciations can only be made by GA11 upload. There are no digital renunciations for the Public Trustee.
6. You can add multiple renunciants, if needed.

Resource: [“What to expect as a Renunciant”](#) - a guide to help renunciants and nominators understand what will happen if you proceed digitally, rather than by document upload.

Renunciations

If the Applicant's priority to apply is dependent on the renunciation of other persons, identify those persons here. Do not add deceased persons.

ⓘ Section 14 of the [Public Trustee Act](#) states that where a person dies anywhere leaving property in Alberta and a minor or a represented adult for whom the Public Trustee is trustee has an interest in the estate, the Public Trustee has the same priority to apply as the minor or the represented adult would have if they were an adult of full legal capacity.

Contact the Public Trustee to obtain a GA11 to be uploaded to SDS. (The Public Trustee can not renounce digitally)

+ Add person

+ Add Public Trustee

1

2

The renunciant

Is the renunciant 18 years of age or over?

3

Yes

No

Renunciant

4

Select a renunciant*

Renunciation method

5

Digital renunciation

GA 11 upload

6

+ Add person

+ Add Public Trustee

Other People with priority to apply (Grant of Admin or Admin with Will Annexed)

If there are people who have priority equal to or higher than the applicant(s), and they are not renouncing, they should be listed within this section. This includes someone who:

- Would have had priority but is deceased
- Was a minor on the deceased's date of death
- Is an adult who lacks capacity to make decisions respecting financial matters
- Is an adult who cannot be located

TIP: The more information you provide to the Court, the less likely it is that a Justice will reject or seek additional information. This will speed your grant.

Other persons of equal or higher priority who are not renouncing/nominating

Are there any people of equal or higher priority to apply to the applicant(s), as defined in Part 3 of the [Estate Administration Act](#)? Please include people who are:

- Deceased
- Unable to act but not renouncing/nominating (explanation required)
- Unwilling to act but not renouncing/nominating (explanation required)

Yes

No

Uploading the will and other testamentary documents

The Will and other testamentary documents should include the required endorsements and signatures, per Surrogate Rule 16. If there are requirements missing, you must provide an explanation in the Irregularities section or your application will be rejected.

1. **View an example of the back of a will** showing the required Rule 16 endorsements:
<https://surrogate.alberta.ca/rule-16>
 - a. Drag and drop or click to upload your file. Files must:
 - b. be PDF format
 - c. be standard letter sized (please avoid uploading scans with large dimensions)
 - d. contain bookmarks if greater than 25 pages
 - e. NOT have editable fields (as this may prevent the reviewing clerk from opening the file)
 - f. NOT be password protected
 - g. If there is any writing or marking on the back of any pages of the will, those pages **must** be included in the digital upload.
 - h. If the Rule 16 endorsements don't appear on the front of the will, you must scan the back of the last page of the will and include it in the upload.
2. If you need to add a codicil, memo, or any other document, click on “Add Other Document”. This will open a panel that will allow you to describe the document, enter a date, and upload a file. You can add as many additional documents as you need.

Upload Will and other testamentary documents

Attach a scan of the most recent **original** will, along with any codicil or other document(s) that form part of the will. Note: the **original** will, any codicil(s) or other document(s) related to the will must be delivered to the Court once the application is approved by a Clerk. **SDS cannot accept applications based on a copy of a will.**

Will

↑ Drag and drop or click to upload

Uploads must be PDF format. Recommended size is no larger than 20 MB per file. File size can be reduced using a PDF compressor.

Date of will

MM/DD/YYYY

Does the upload include all Surrogate Rule 16 requirements?

Required: a witness' affidavit (usually in the form of a GA8 or GA9) as well as the corresponding exhibit stamp and signature on the will.

Yes No

Does the will mention a possible memo, list or other document?

To be incorporated by reference, a document must exist at the time the will was made. If the will refers to a memo the testator may leave, it does not exist at the time the will was made and therefore is not a document incorporated by reference. If the clause is ambiguous, select option 2 and provide an explanation in the irregularities.

Yes. Documents **incorporated by reference** are attached as testamentary documents, as per *Surrogate Rule 22*.

Yes, but the terms of the clause **do not incorporate** the document(s), so they are not attached.

Yes, but after a search, **no documents have been found**.

No

Does the will include a survivorship clause?

A survivorship clause is a clause in the will that says that a beneficiary can only inherit if they live for a specified number of days after the person who made the will dies.

For example: \$1,000 to my nephew Peter, if he survives me by 28 days

Yes No

The original will is written in:

English

French

Other

+ Add other document

Uploading Supporting Documents

Counsel can upload optional documents that support an application.

1. Drag and drop or click to upload your file to the corresponding section on the page. Files must:
 - a. be PDF format
 - b. be less than 100MB in size
 - c. be standard letter sized (please avoid uploading scans with large dimensions)
 - d. contain bookmarks if greater than 25 pages
 - e. NOT have editable fields (as this may prevent the reviewing clerk from opening the file)
 - f. NOT be password protected
2. Select the Document Type. The following can be uploaded:
 - a. Affidavit
 - b. Cohabitation Agreement
 - c. GA12 Reservation of Right to Apply for a Grant
 - d. Invalid Will
 - e. Order
 - f. Prenuptial Agreement
 - g. Previously filed documents
 - h. Other (description required)
3. You can remove an uploaded document if needed.
4. You can add as many supporting documents as needed.

DO NOT upload the following, as your application will be rejected:

- C Forms,
- Proposed Orders
- Chambers Applications

Supporting documents (optional)

- You can file additional documents that support your application, but which are not incorporated by reference in the will
- Do NOT upload the following documents:
 - Contentious Forms (C Forms)
 - Proposed orders
 - Chambers applications
 - GA11 renunciation form
 - GA13 nomination form
- Originals of these documents **should not** be submitted to the Court for storage.

Supporting document

1

⬆️ Drag and drop or click to upload

Uploads must be PDF format. Recommended size is no larger than 20 MB per file. File size can be reduced using a PDF compressor.

Document type

2

Select*

3

🗑️ Remove

4

+ Add other document

Express Authorizations

An express authorization from the Court may be required by a digital asset provider to enable a personal representative to deal with the digital assets of the deceased (e.g. email or social media accounts).

Counsel can enter requested express authorization text. If approved, the requested text will appear on the face of the Grant.

Explaining irregularities or special circumstances

In each of the main sections of the application, there is a field for you to explain irregularities or provide pertinent information to the Justice. Use these fields to provide information to the Court that helps clerks and Justices to understand discrepancies.

All irregularity explanations will be visible to both the review clerk and the Justice.

Each irregularity field allows a maximum of 5000 characters. Be brief and clear.

Express authorizations – digital assets

An express authorization from the Court may be required by a digital asset provider to enable a personal representative to deal with the deceased's digital assets (e.g., email or social media accounts). Approved text will appear on the face of the Grant.

Requested express authorization text

Max 5000 characters

Irregularities

Are there any irregularities pertaining to any other supporting documents as part of this Grant application?

Max 5000 characters

Beneficiaries

There are three different types of beneficiaries, depending on the type of grant you are applying for.

- Beneficiaries of a **specific gift**
 - Displays only when the application includes a will (Probate or Administration with Will Annexed)
 - Specific gifts are optional.
- Beneficiaries of **residue**
 - Displays only when the application includes a will (Probate or Administration with Will Annexed)
 - At least one residuary beneficiary is required.
- Beneficiaries on **intestacy**
 - Displays when there is no will, or when the will doesn't address the entirety of the residue of the estate (patril intestacy).
 - If beneficiaries on intestacy display, at least one is required.

You will only see the beneficiary types that apply to your grant type, as determined by the initial screening questions. To avoid rejection, be sure to add beneficiaries in the correct section.

1. Select "Add a person" to add a person as a beneficiary. See the next page for details on adding a person.
2. Select "Add an entity" to add a charity or organization as a beneficiary.
3. Each beneficiary section has its own Irregularities area.

You can add as many beneficiaries as required.

Beneficiary information is used to generate notices.

- If a beneficiary has an email address, they will be served digitally by SDS.
- If beneficiaries don't have an email address, you must serve using other methods and certify service in SDS (see section about [Serving Notice](#))
- If the information you provide about the beneficiary indicates that the Public Trustee must be served, SDS will do that automatically (see section about [Serving the Public Trustee](#))

GA20 Affidavit of Trustee: Although there may be a requirement to obtain a GA20 in certain circumstances, there is no requirement to file the form with the Court.

Residuary beneficiaries

The following persons are beneficiaries who are to receive a residual share of the deceased's estate under the deceased's will. Persons who are to receive a residual share will receive Notice of this gift. Residue may be described in the will as "residue of my estate" or "anything left over".

+ Add a person

+ Add an entity

1

2

Irregularities

To avoid rejection, if any of the following are true, please explain:

- Residue in the will doesn't match residue in the application
- Residue doesn't add up to 100%
- The will or application fails to address residue
- Residue is given to a beneficiary in a document other than the will (ie: in a memo)

Are there any irregularities relating to the residue?

3

max 5000 characters

Beneficiaries when there is a will

Add beneficiaries in the same order as they are listed in the will.

Describe the gift or portion of the residue the beneficiary is to receive.

1. Beneficiary of Specific Gifts.

2. Describe the gift.

3. Indicate if a specific gift has been adeemed or is to be held in trust.

4. Add additional people or entities that are to receive specific gifts.

5. Beneficiary of Residue.

6. Describe the gift.

7. Indicate if the residue is to be held in trust.

8. Add additional people or entities that are to receive residue.

TIP: If the gift description differs from what is in the will, provide an explanation in the Irregularities section.

Beneficiary – Ben Ificiary 1

Name	Email	Address for service	Person type
Ben Ificiary	dennis@breenconsulting.ca	12345- 67 Ave Edmonton AB T8N 9T0 Canada	Adult

Notice recipients
Individual

Remove Edit

Description of gift(s)
Please provide the description of the gifts listed in the will, including the item or amount of money, who the gift is to be given to, and any other instructions that are provided in the will regarding the gift. Description provided should align with information in the will. Adeemed gifts: Adeemed refers to an item having been sold, given away, converted or destroyed during the lifetime of the deceased.

Gift

Gift description
Birch bark canoe 2

Adeemed 3
 Held in trust

+ Add another gift Remove empty rows

Remove

+ Add a person + Add an entity 4

Residuary beneficiaries 5

The following persons are beneficiaries who are to receive a residual share of the deceased's estate under the deceased's will. Persons who are to receive a residual share will receive Notice of this gift. Residue may be described in the will as "residue of my estate" or "anything left over".

Beneficiary – Rezzy Doe

Name	Email	Address for service	Person type
Rezzy Doe	dennis@breenconsulting.ca	222 Street Ave., Edmonton AB T3T 3T3 Canada	Adult

Notice recipients
Individual

Remove Edit

Share of residue
Total residual shares allocated to the residuary beneficiaries usually adds up to 100% or the residue is divided into 'shares or proportions' which captures all of the residue. Description provided must align with how the residue is allocated in the will.

Description of proportion*
100% of the residue of the estate 6

Held in trust 7

i.e. percentage, fraction. max 2048 characters.

Remove

+ Add a person + Add an entity 8

Beneficiaries on intestacy

1. Beneficiary on intestacy
2. When you add beneficiaries on intestacy, you must select their relationship to the deceased from a menu.
3. If the beneficiary is a child, grandchild or other descendant of the deceased, you must also indicate if they are a child of the surviving spouse or Adult Interdependent Partner.
4. Describe the gift (i.e. percentage or share of the estate)
5. Select the applicable section of the Wills and Succession Act

Beneficiaries on Intestacy

Beneficiary – Bobby Deadman 1

Name	Email	Address for service	Person type
Bobby Deadman	dennis@breenconsulting.ca	14406-103 Ave Edmonton AB T5N 0T2 Canada	Adult
Relationship to deceased	Notice recipients		
Child of the deceased 2	Individual		
Remove	Edit		

Relationship to spouse or AIP of the deceased

- There is no surviving spouse or AIP
- This person is a child or other descendant of the surviving spouse or AIP 3
- This person is **not** a child or other descendant of the surviving spouse or AIP

Gift

Description of gift* 4

i.e. percentage, fraction. max 2048 characters.

Applicable section of the [Wills and Succession Act](#)

5

Adding a person as a Beneficiary

When you add a person, you must choose one option that best describes them. This selection is used to determine how service will be effected.

1. **Minor** on the date of the deceased's death, the Public Trustee is automatically served by SDS. You **do not** need to complete a GA4.
 - a. If you select this option, you must enter the person's date of birth. If you don't know the date of birth, enter an estimate and explain in irregularities.
 - b. If the person is still a minor when the application is created, you need to select their relationship to the deceased. You also have the option to enter names of Guardians. Guardians will be served on behalf of the minor.
 - c. If the person is no longer a minor, they will be served personally.
2. **Lacks capacity to make decisions respecting financial matters:** you will be asked if the Public Trustee has been officially appointed as their trustee.
 - a. If yes, the Public Trustee will automatically be served.
 - b. If no, you can indicate if they are represented by a different trustee or attorney. If you enter a trustee or attorney, they will be served on behalf of the person. If they are not represented, the person will not be served.
 - c. NOTE: The Public Trustee will only accept service if they have been officially appointed as a person's trustee. Serving the Public Trustee in error will delay your Grant.
3. **Cannot be located:** you will be asked if they have been declared by the Court to be a missing person under the Public Trustee Act.
 - a. If yes, the Public Trustee will automatically be served.
 - b. If no, the person will not be served.
4. If the person is not described by any of these special circumstances, select "None of the above".

Resource: "[What to expect as a Beneficiary](#)" - a guide to help beneficiaries understand what will happen.

Grant Application — Next

APPLICATION PROCESS

- 1 Apply for Grant
- 2 **Beneficiaries**
- 3 Potential claimants
- 4 Inventory — deceased
- 5 Inventory — jointly owned a
- 6 Review draft and send
- 7 Certification
- 8 Submit and pay
- 9 Payment confirmation
- 10 Serve notices
- 11 Grant approval

Add recipient

Full legal name

First name* Middle name or initial Last name*

[+ Add other names known by](#)

Relationship to deceased

Select*

This person: *

- 1 Was a minor on the date of the deceased's death
- 2 Is an adult who lacks capacity to make decisions respecting financial matters
- 3 Is an adult that cannot be located
- 4 None of the above

Cancel Next

Potential claimants

In this section you will be asked a series of questions pertaining to either:

- Part 5 of the *Wills and Succession Act*; or
- the *Family Property Act*

Depending on how you answer these questions, people may be identified as potential claimants.

Information from this section will be used to generate notices to potential claimants.

- If the individual has an email address, they can be served digitally.
- If potential claimants don't have an email address, you must serve them by another method and certify service on **Step 11: Service Notices** (see section about [Serving Notice](#)). Applications will not be reviewed by a Justice until all service is complete.
- If the information you provide about the potential claimant indicates that the Public Trustee must be served, SDS will do that automatically (see section about [Serving the Public Trustee](#))
 - If the Public Trustee is served, you do not need to complete a GA4. Once complete, the Public Trustee's response will be available in the Documents panel of the application.
- Be sure to explain any irregularities. For example, if the deceased had a spouse that either predeceased the testator or is presently deceased.

Resource: "[What to expect as a Potential Claimant](#)" - a guide to help Potential Claimants understand what will happen.

Grant Application — Deadman

Admin Draft

Check for Errors Save Progress Next More options

APPLICATION PROCESS

- 1 Apply for Grant
- 2 Beneficiaries
- 3 Potential claimants
 - Wills and Succession Act
 - Family Property Act
- 4 Inventory — deceased
- 5 Inventory — jointly owned assets
- 6 Review draft and send
- 7 Certification
- 8 Submit and pay
- 9 Payment confirmation
- 10 Serve notices
- 11 Grant approval

respect of whom the deceased stood in the place of a parent on the date of the deceased's death:

Yes No

Persons with potential claims against the estate · *Family Property Act*

Under the [Family Property Act](#), a spouse or adult interdependent partner might be entitled to support, including support from the deceased's estate, based on factors in Section 8 of the [Family Property Act](#).

Spouse

Did the deceased have a spouse?*

Grant applicants are required by section 11(2) of the [Estate Administration Act](#) to serve a copy of the Grant application and a notice pertaining to the rights of a spouse under the [Family Property Act](#) on any spouse (as defined in that Act) unless that spouse is entitled to receive the deceased's entire estate.

Generally, the Family Property Act requires that an application for a family property order by a spouse or former spouse be commenced not later than 2 years after whichever of the following applies:

- a. the date upon which the decree nisi is issued in divorce proceedings;
- b. the date upon which a declaration of nullity of marriage has been made with respect to the Deceased's death;
- c. the date upon which a judgment of judicial separation has been granted to one of the spouses;
- d. the date upon which a declaration of irreconcilability has been made under the Family Law Act.

Yes No

Sole Beneficiaries

The Estate Administration Act provides an exemption that makes it unnecessary to serve certain family members as a potential claimant under Part 5 of the Wills and Succession Act and/or the Family Property Act when they are entitled to receive the entire estate.

This applies only to sole beneficiaries who are identified as the deceased's:

- Spouse,
- Adult Interdependent Partner,
- Former Spouse, OR
- Former Adult Interdependent Partner

1. Add a Spouse, Adult Interdependent Partner, Former Spouse, or Former Adult Interdependent Partner to the Potential Claimants section of the application and click "Save Progress".
2. SDS will detect when this Spouse/AIP/Former spouse/Former AIP is the sole beneficiary identified from Step 2: Beneficiaries, and will indicate that they will be served as the sole beneficiary, but not as a potential claimant.
3. The "Notice Recipient" indicator will show "Sole Beneficiary".
 - a. If the Public Trustee, an attorney or trustee is served on behalf the beneficiary, the tag will also update:
 - i. Sole Beneficiary % Public Trustee
 - ii. Sole Beneficiary % Attorney
 - iii. Sole Beneficiary % Trustee

When this person is later served as a Beneficiary, the Notice will no longer contain clauses identifying them as a potential claimant.

Persons with potential claims against the estate · Part 5 of the *Wills and Succession Act*

The Applicant(s) is (are) required by section 11(1) of the [Estate Administration Act](#) to serve a copy of the grant application and a notice pertaining to the rights of family members under Part 5 of the [Wills and Succession Act](#) on certain family members.

When you add potential claimants, Surrogate Digital Service will automatically generate notices for each recipient. If you provide an email address, the recipient will be served digitally.

Spouse

Did the deceased have a spouse?*

Applicants must serve a copy of the grant application and a notice pertaining to the rights of family members on the deceased's spouse unless the spouse is entitled to receive the Deceased's entire estate.

Yes No



Person

Name	Email	Address for service	Status	Notice recipients
Jane Doe	jane@email.com	1234 56 Street Edmonton AB T5T 5T5 Canada	Adult	Sole beneficiary

[Remove](#) [Edit](#)



 This person will be served as the sole beneficiary, but not as a potential claimant



Inventory

- Steps 4 and 5 collect information about the deceased's assets and liabilities. Your entries determine the **value of the estate** and allow SDS to **serve the inventory to beneficiaries and interested parties** who are entitled to see it. Inventory values are also used to automatically calculate the application fee, which is charged when you submit the application to the Court.
- For each of the asset sections, click "Add item" to add an asset. You can add as many assets as you need.
- If the value of the asset is unknown at the time of application, you can indicate that the value is "TBD". Your application can be submitted and a grant issued while it contains TBD values. After the grant is issued, you will be required to amend the inventory, get it certified by the applicant and serve Notice of Amended Inventory to beneficiaries and interested parties (see the section on [Amending the inventory](#) for details).
- If you've added an item that isn't needed, it can be removed.

The inventory includes 7 sections for different asset types and 1 section for liabilities. For each asset, you must identify if it is located outside of Alberta

- if outside of Alberta:** the value of the asset will NOT be used in calculating the surrogate fee, but WILL be included in the total value of the estate disclosed to beneficiaries and interested parties.
- if within Alberta:** the value of the asset WILL be used in calculating the surrogate fee, and will be included in the total value of the estate disclosed to beneficiaries and interested parties.

Grant Application – Deadman

Admin Draft

Check for Errors Save Progress Next More options

APPLICATION PROCESS

- Apply for Grant
- Beneficiaries
- Potential claimants
- Inventory – deceased**
- Inventory – jointly owned assets
- Review draft and send
- Certification
- Submit and pay
- Payment confirmation
- Serve notices
- Grant approval

Inventory: Assets owned by the deceased

This inventory has been prepared by the applicant(s) to the best of their ability using information they believe to be accurate and complete. The values shown are as at the date of the deceased's death.

*Where the value of an item has been described as "to be determined", the applicant(s) has (have) undertaken to serve an amended inventory when updated information becomes available.

This inventory identifies the assets and liabilities of the deceased wherever they are located.

The Court does not review the content of this inventory. It is your responsibility to satisfy yourself as to the accuracy and completeness of this inventory. Concerns about this inventory should be addressed to the applicant(s).

For values in other currencies, please convert to Canadian dollars (\$CAD)

Land and minerals

Please list all land and/or mineral titles that were owned by the deceased at the time of death, either as sole owner or as tenant-in-common (but not as joint owner). This may include a residential or commercial property, condominium, farmland or mineral rights.

+ Add item

Bank and investment accounts

Please provide the information relating to any bank accounts or investment accounts held solely by the deceased. These may include: chequing or savings accounts, RRSPs or other retirement funds.

Account

the asset is located outside of Alberta, Canada

Financial institution* Account type or description

Balance (\$) * TBD

Remove

+ Add item

Review draft and send

Step 6: Review draft and send, provides you with a complete summary of the draft application. It is also where you go to take actions on the application, such as:

- Downloading a draft to print
 - Responding to a Justice or clerk after a submitted application has been returned
 - Requesting certification from applicants, renunciants or nominators
1. Once the application is complete and there are no errors, click “Request certification”. This will automatically send an email to the applicant(s), who can click a link to review the application online and digitally certify with a click.
 - a. If your application includes digital renunciations or nominations, those certifications will be sent and completed before the applicants receive their digital certification email. See: [Nominations section](#) or [Renunciants Section](#) for more information.
 2. Click “Preview draft” to access a **downloadable PDF** of the application. You can print the document to share with your client in a face-to-face meeting prior to certification.
 3. As you review the application summary, you can click “Edit” to jump to the appropriate step to make changes.

Grant Application — Brown

Admin: Will Annexed

Draft

1

Request certification

More options

APPLICATION PROCESS

- ✓ Apply for Grant
- ✓ Beneficiaries
- ✓ Potential claimants
- ✓ Inventory — deceased
- ✓ Inventory — jointly owned assets
- 6 Review draft and send
- 7 Certification
- 8 Submit and pay
- 9 Payment confirmation
- 10 Submit will
- 11 Serve notices
- 12 Grant approval

Review Application

2

Preview Draft

Please ensure all information is correct. Once submitted, the applicant(s) will receive an email that includes a link to review the application. They will be given the option to certify the application or decline and request changes.

Grant Application

The deceased

Edit

3

Name	Last resided address	Date of birth	Date of death
Charlie Brown	14406-103 Ave Edmonton AB T5N 0T2 Canada	Aug 23, 1964	Jan 18, 2024

Judicial Centre
Edmonton

Errors and warnings

Errors

SDS displays error messages if any required information is incomplete. **You cannot submit your application until all errors have been corrected.**

Examples of errors include:

- Information missing from a required field.
- Multiple renunciations or nominations for the same person.
- On applications that have a will, not including at least one residuary beneficiary.
- On applications without a will, not including at least one beneficiary on intestacy.

Warnings

On applications with intestacy, SDS also provides a limited number of “warnings”. Warnings highlight that your application includes entries that are somewhat unusual. However, **you are free to ignore warnings and submit your application.** If you submit an application that has triggered warnings you are strongly encouraged to provide an explanation in the irregularities.

Examples of warnings include:

- Adding a person in the “priority to apply” section whose relationship to the deceased suggests they may also be a beneficiary, but not including them as a beneficiary.
 - Adding a renunciation or nomination for a person that does not have priority to apply.
1. If there are errors in a section of the application, that section will display in red in the navigation.
 2. Errors will display in a red box at the top of the section.
 3. The specific part of the application that triggered the error will also be highlighted in red.
 4. If there are warnings in a section of the application, that section will be highlighted by a yellow underline.
 5. Warnings will display in a yellow box at the top of the section.

DES-0001823 — Deadman

Probate

Draft

More options ⋮

1 Documents

APPLICATION PROCESS

- ❗ Apply for Grant 1
- ✅ Beneficiaries
- ✅ Potential claimants
- ✅ Inventory — deceased
- ✅ Inventory — jointly owned assets
- ✎ Review draft and send

❗ There were problems with the following fields. You must resolve them in order to proceed.

- 'First Name' must not be empty. 2

The deceased

Full legal name of the deceased

First name*

Middle name or initial

Last name*

Deadman

First name is required

Grant Application — Deadman

Admin

Draft

Check for Errors

Save Progress

Next

More options ⋮

APPLICATION PROCESS

- ✅ Apply for Grant
- ⚠ Beneficiaries 4
Beneficiaries on intestacy
- ✅ Potential claimants
- ✅ Inventory — deceased
- ✅ Inventory — jointly owned assets
- ⚠ Review draft and send
- 7 Certification

⚠ Potential issues detected. If these are not errors, you may proceed.

- Based on the people recorded in Step 1, it's possible that the following people should also be beneficiaries on intestacy. Please ensure that the application complies with the *Wills and Succession Act*.

- Abe-Lee Kant

To avoid rejection, you may wish to add an explanation under irregularities. 5

Beneficiaries on Intestacy

Beneficiary — Missy Deadman

What your clients can expect

Renunciations and Nominations

If your application includes digital renunciations or nominations, they will be sent out when you click “Request certification” on the “Review draft and send” step. People renouncing or nominating will receive an email notification that includes a link to a page where they can complete their renunciation or nomination.

1. **Email to renuciant(s) and/or nominators:** Expires after 96 hours. The recipient is sent a reminder email every 24 hours until expiry. If the notice expires before the certification is completed, it can be resent (and the email address edited) from the “Certification” step.
2. **Renunciation / Nomination page:** When the person clicks on the link in the email, they go to a web page where they can view:
 - a. part of the Grant application
 - b. attachments included in the application (Will, codicil, etc.)
 - c. certification statement
3. If the recipient is satisfied, they can proceed. If they aren’t ready to renounce/nominate, they can choose “**Changes required**”, which will send the application back to you.
4. **Renunciation/Nomination certification statement:** After reading the statement, the recipient can certify or decline.
5. They must click “Next” to complete the process.

After certification, the Renuciant/Nominator can download a PDF copy of their certified document.

Once renunciations and nominations are complete, SDS sends a certification notice to the applicants by email.

Resources: “[What to expect as a Renuciant](#)”; “[What to expect as a Nominator](#)” – guides to help renuciants and nominators understand what will happen.

1 Please review the Renunciation for the Estate of John Doe
2139308 Alberta Ltd./Surrogate Tests x

Surrogate Digital Service <...> 10:18 AM (5 minutes ago) ☆ ↶
to me

Alberta

Dear Rachel Renuciant,

Your Renunciation document is ready for your review and certification.

Application Details

- Grant type: Probate
- For the estate of John Doe

Please visit the link below to review and certify the application. Once certified by all required parties, the application can be submitted to the Court for approval.

Link: <https://d2wwny8uo8aets.cloudfront.net/notices/r/8b1ebe46-1fe7-4427-97b9-e22236f78788>

2 Renunciation — Rachel Renuciant

Home Help

Deceased	Procedure	Last updated date
John Doe	Probate	Nov 4, 2022

Instructions

1. On this form you will certify your intention to renounce your position of personal representative in the estate of **John Doe**. Please review the details below carefully as it is your responsibility to ensure that the information provided is correct to the best of your knowledge.
2. Your options are available at the bottom of the page. If there are no changes required, you will be asked to certify the renunciation. This allows the applicant's lawyer to proceed with submitting this application for Grant of Probate on your behalf. If changes are required, you can decline and enable the applicant's lawyer to make necessary changes.

You can contact the applicant's lawyer for any further information you may need.

Grant Application

Information about the deceased

Name	Last resided address	Date of birth
John Doe	1234 55 Street Edmonton AB T8T 8T8 Canada	Jan 20, 1932

The full application and attached documents are included in one scrolling page.

3 Proceed to my renunciation
 Changes required
Please contact the applicant's lawyer directly to discuss what needs to change.

4 **Renunciation**

You are required to certify the statements below are true before the applicant's lawyer can submit the application to the Court. Ensure you have carefully reviewed the information in the application, the documents to be submitted with it and that you agree with the statements below. **Certifying statements in an application to the Court to be true, knowing that they are not can result in severe consequences, including being held in contempt of court and/or being found guilty of an offence.**

I, Rachel Renuciant, certify the following statements are true. Where the information is based on advice or information and belief, this is stated.

1. I am a person that may apply to the Court of King's Bench of Alberta for a grant under section 13(1) of the Estate Administration Act to administer the estate.
2. I do not wish to serve as the Deceased's personal representative.
3. I renounce my entitlement to apply for a grant.
4. I have not intermeddled in the Deceased's estate.

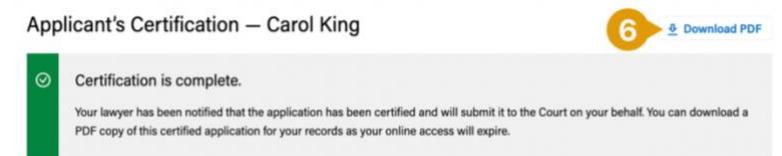
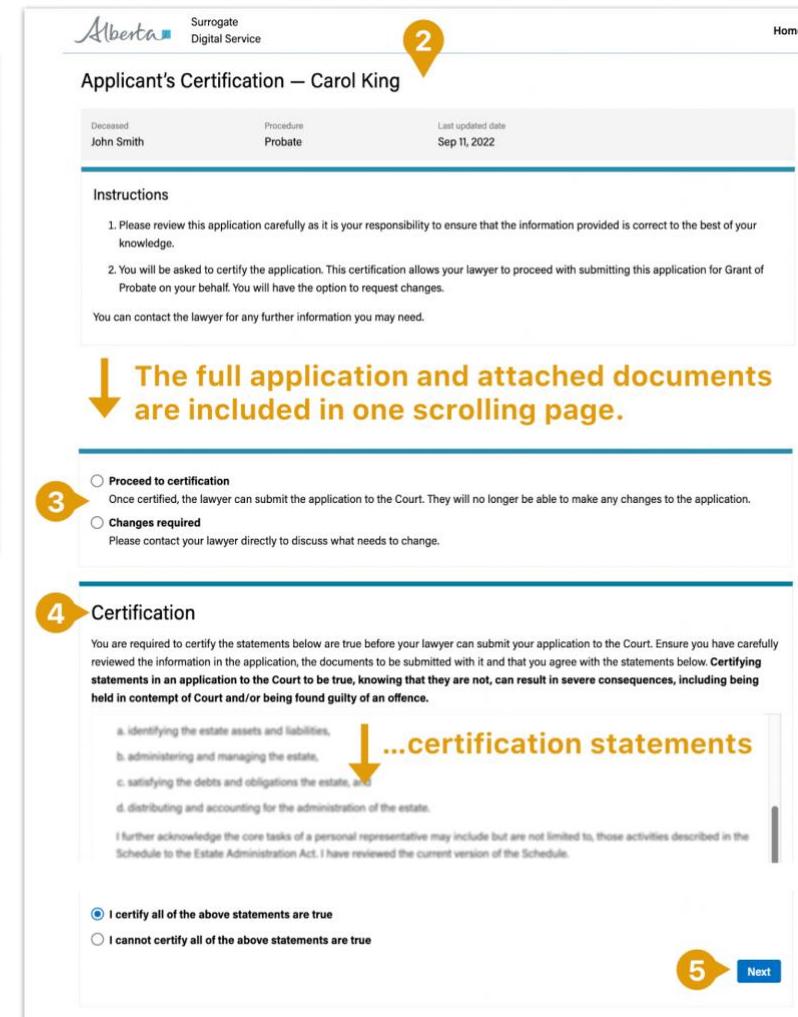
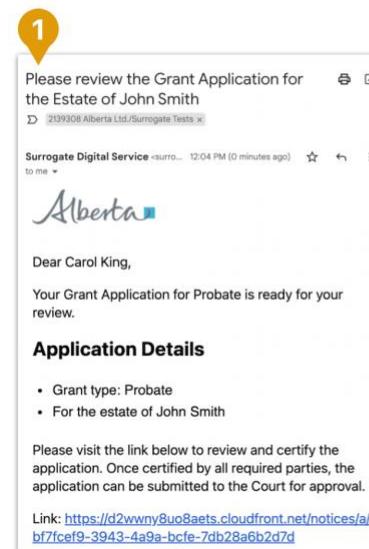
I certify all of the above statements are true
 I cannot certify all of the above statements are true

5 Next

Applicant certification

When you click “Send to applicant” on the “Review draft and send” step, SDS generates an email to the applicant(s). The email includes a link to a web page where they can view and certify the application. The status of the application changes to “Pending Certification”.

1. **Email to applicant(s):** Expires after 96 hours. The applicant will be sent a reminder email every 24 hours until expiry. If the notice expires before the certification is completed, it can be resent (and the email address edited) from the “Certification” step.
2. **Certification page:** When the applicant clicks on the link in the email, they go to a web page where they can view:
 - a. the complete Grant application
 - b. attachments included in the application (Will, codicil, etc.)
 - c. certification statement
3. If the applicant is satisfied with the application, they can **proceed to certification**. If the application needs changes, the applicant can choose “**Changes required**”, which will notify you by email so you can revise the application.
4. **Certification:** After reading the certification statements, the applicant can certify or decline.
 - a. If they certify, it will be recorded by SDS and the application will be sent to the Court for clerk review. You and the applicant can download a PDF of the certified application.
 - b. if there are multiple applicants, ALL applicants must certify before the certified application can be downloaded
 - c. if an applicant certifies, but another declines, the initial certification will be canceled.
 - d. If the applicant does not certify, you can make revisions to the application and re-send it for certification.
5. The applicant must click “Next” to complete the process.
6. After the applicant certifies, they can download a PDF copy of their certified application. After all applicants have certified, the status of the application changes to “Ready to submit”.



Tracking and managing Certifications

You can track the status of renunciations, nominations and applicant certifications on the Certification screen (Step 7).

Expired certification: If a certification request expires, you can resend it.

Edit applicant's email address: When you click "Re-send", you can edit the person's email address.

If the applicant doesn't receive the certification email:

- Ask the applicant to search their email for "Surrogate Digital Service". Sometimes SDS emails are flagged as junk mail.
- Edit the applicant's email address to send the notice to a different email address.
- If the steps above don't work, contact JSG.SurrogateSupport@gov.ab.ca and we can help

After certification is completed by all applicants, the status of the application will become "Ready to submit".

Grant application – Chow

Pending Certification

More options ⋮

APPLICATION PROCESS

- ✓ Apply for grant
- ✓ Beneficiaries
- ✓ Potential claimants
- ✓ Inventory – deceased
- ✓ Inventory – jointly owned assets
- ✓ Review draft
- ✎ Certification**

Applicant certifications

All applicants must certify the application before it can be submitted. You will be notified by email if any applicants request changes.

Applicant	Type	Date sent	Expiry	Status	
John Doe	Certified Application	Sep 11, 2022	Sep 14, 2022	Pending	Re-send
Jane Doe	Certified Application	Sep 11, 2022	Sep 14, 2022	Pending	Re-send

Submit and pay

When all certifications are complete, the application status changes to “Ready to submit”. You will receive an email notification of this status change. Open the application and go to Submit and pay (Step 8).

1. The application status displays as “ready to submit” on your dashboard.
2. Enter your credit card information and click “Pay”. Your credit card is charged instantly. There is no pre-authorization period. You will receive an email notification confirming submission.
3. When payment is complete, the “Submit and pay” screen will display your payment confirmation. This is your receipt. If needed, you can print this page for your accounting records.

When payment is complete, the status changes to “Submitted” and the application is sent to the Court for clerk review. When a clerk completes their review and approves the application, a DES file number is assigned and SDS automatically emails notices to beneficiaries and other interested parties.

Applications
Wills, estates & trusteeships

Date modified	Lawyer file no.	File number	Applicant(s)	Deceased	Status
Mar 13, 2024	--	--	Kant, Abe-Lee	Deadman, Guy	Ready To Submit

Grant Application – Deadman Admin Ready To Submit Pay More options

3 Documents

APPLICATION PROCESS

- Apply for Grant
- Beneficiaries
- Potential claimants
- Inventory – deceased
- Inventory – jointly owned assets
- Review draft and send
- Certification
- Submit and pay

9 Payment confirmation

10 Serve notices

11 Grant approval

Processing fee

Total **\$35.00**

Name on card

Test card

Card number

5100 0000 1000 1004

Expiration date CVV

12 / 33 123

Back Pay

Grant Application – Deadman Admin Submitted Next More options

3 Documents

Payment Confirmation

Details of the payment transaction are below.

*PLEASE NOTE: Previous fee payments are not refundable for Surrogate fees if the value of the estate decreases as a result of inventory amendment. Please contact your local court office should you have any concerns.

File number	Applicant	Grant type	Estate
--	Abe-Lee Kant	Admin	Guy Deadman

Judicial centre	Lawyer file number
Calgary	--

Estate value	Fee
\$10,000 or less	\$35.00

Paid on	Card type	Card number	Order number
Mar 13, 2024, 6:31:18 AM	MasterCard	**** * 1004	DES-46E7782B-D7CC-4CE9

Transaction ID	Amount	Status
10002490	\$35.00	Paid

APPLICATION PROCESS

- Apply for Grant
- Beneficiaries
- Potential claimants
- Inventory – deceased
- Inventory – jointly owned assets
- Review draft and send
- Certification
- Submit and pay
- Payment confirmation
- Serve notices
- Grant approval

Assign an application to a legal assistant

By default, applications can only be seen by legal assistants when they **create** them. However, lawyers can assign an individual application to a specific legal assistant, regardless of who created it.

- Applications can only be assigned to one legal assistant at a time.
- Applications can only be assigned to assistants who already have filing permissions for the responsible lawyer. If you want to assign an application to an assistant that does not have filing permissions, they must first request permission and be approved by the lawyer. (See: "[Requesting access from a lawyer](#)")
- Legal assistants cannot reassign applications. Only the responsible lawyer can do it.

1. Open the application and click on "More Options".
2. Select "Manage access", then select the assistant you want to assign the application to.

Deleting a draft application

You can delete applications that are in "Draft" status.

3. Click "More options" and select "Delete". **Deleted applications cannot be recovered.**

The screenshot shows the 'Grant Application' interface in 'Draft' status. The main section is titled 'The deceased' and contains a form for 'Full legal name of the deceased' with three input fields: 'First name*', 'Middle name or initial', and 'Last name*'. Below the form is a question: 'Is the name on the death certificate different from the names above?'. On the left, there is a sidebar with 'Documents' and 'APPLICATION PROCESS' sections. The 'APPLICATION PROCESS' section has a blue 'Apply for Grant' button and two links: 'About the deceased' and 'About the applicant(s)'. At the top right, there are buttons for 'Check for Errors', 'Save Progress', and 'Next'. A 'More options' dropdown menu is open, showing options: 'Refresh', 'Recall', 'Manage access', 'Delete', and 'View History'. Three numbered callouts (1, 2, 3) point to the 'More options' button, the 'Manage access' option, and the 'Delete' option respectively.

Serving Notices

Digital notices are automatically generated based on information entered in the application. Notices are served after the clerk has completed their review and approved the application.

SDS automatically sends digital notices to all Beneficiaries and Potential Claimants for whom you have entered email addresses. If you have not entered an email address for a Beneficiary or Potential Claimant, you must print the notice, serve it manually, and certify service in SDS. See: [Tracking and managing notices](#).

1. **Email providing access to the notice.** If the recipient clicks on the link, the digital service records this action as completing service.
2. **Notice that opens from the email link.**
 - a. Access to the Notice **expires** after 72 hours for security reasons.
 - b. Email reminders are sent to the recipient every 24 hours until expiry.
 - c. If a notice expires you can resend it from the “Serve notices” step. See: [Tracking and managing notices](#).

Notice recipients can view:

- Notice information that pertains to them
- Grant application (not seen by beneficiaries of specific gifts)
- Inventory (not seen by beneficiaries of specific gifts)
- Will and other testamentary documents (not seen by beneficiaries of specific gifts)
- A list of other beneficiaries or other interested parties that will receive notice
- if a person is more than one recipient type (e.g. they are a residuary beneficiary AND a potential claimant), they will receive a single, combined notice.

Resources: to help beneficiaries and potential claimants understand what will happen:

- [What to expect as a Beneficiary](#)
- [What to expect as a Potential Claimant](#)

1

Surrogate Digital Service <surrogate.digitalservice@gov.ab.ca> Unsubscribe
to me

Alberta

Dear Frederick Felix Fredericks,

You have received a notice as either a beneficiary or potential claimant regarding the following estate.

Details

File number: DES-0000127
Grant type: Probate
For the estate of Jonathan Jeremiah Johnson
Applicant(s): Frederick Felix Fredericks

Please visit <https://d2wvwny8uo8aets.cloudfront.net/notices/bf9a980a0e-793c-4552-8fa9-e66d5cd17b03> to view the notice. Your online access to this notice will expire in 72 hours.

Contact

You can contact the responsible lawyer for any further information you may need.
Law firm: Miller Thomson LLP
Lawyer: Michael Collins
Address: 3000, 700 9th Avenue SW, Calgary, AB T2P 3V4

2

Alberta Surrogate Digital Service Home

Notice to beneficiaries and other interested parties

Viewed on: Jun 15, 2022 [Download PDF](#)

Notice to: Frederick Felix Fredericks

Court	Judicial Centre
Court of Queen's Bench of Alberta (Surrogate Matter)	Edmonton

Estate name	Date of death
Jonathan Jeremiah Johnson	Jun 2, 2022

Applicant
Frederick Felix Fredericks

Email
dennis@breenconsulting.ca

Address
242 Dale Ave
Ottawa AB
K1G 0H5

Date issued
Jun 15, 2022

The [Estate Administration Act](#) and the Surrogate Rules require grant applicants to notify beneficiaries and certain other parties with interests in the deceased's estate. You are one of the persons entitled to be notified.

A grant has been applied for by the applicant(s).

You are named in the application and/or the last will of Jonathan Jeremiah Johnson as:

- a beneficiary – non-residuary gift

As a beneficiary, the will gives you:

Non-residuary gifts

- Guitar
- Painting: Night Windows, by Edward Hopper

Once the Court issues the grant, the applicant(s) must collect in the estate property, pay the debts, complete the administration of the estate and anything else required of the applicant(s). The applicant(s) will then be able to distribute your gift to you if it is not needed to pay the debts and expenses of the estate. Distribution of the estate may be delayed if a claim is made against the estate under the [Family Property Act](#) or Part 5 of the [Wills and Succession Act](#).

Applicants have certain duties under the [Estate Administration Act](#), including requirements to communicate regularly with beneficiaries and to maintain proper financial records. If you believe that the applicant(s) is (are) not complying with any of their duties under that Act, first try to resolve the matter through discussion with the applicant(s). If you are unable to resolve the matter, you or your lawyer may apply to the Court, which may provide a remedy if it is satisfied that the applicant(s) is (are) not complying with their duties.

It is recommended that you download a PDF copy of this notice for your records as your online access will expire 72 hours after you received the email notice.

For more information, contact the applicant's lawyer at:

Law firm	Responsible lawyer
Miller Thomson LLP	Michael Collins
Email address	Phone
mike.apollo.cmp@gmail.com	(403) 298-2400
Address	
3000, 700 9th Avenue SW Calgary AB T2P 3V4	

Tracking and managing notices

Lawyers can track and manage service on Step 11: Serve Notices. Notices can have the following statuses:

- **Pending:** digital notice has been sent but it has not yet been viewed/completed
- **Action required:** digital service was not attempted (no email address entered). You must serve by another method and update SDS to indicate the method and date of service.
- **Expired:** digital access expires after 72 hours. You must attempt digital service again, or choose an alternate method
- **Completed**
- **Invalid:** this may occur if an application was halted after service, or if digital service failed.

1. For each recipient, you can see if service is complete or pending. Click on a recipient to manage service (See bullet 2).
2. Notice details panel.
3. From the Notice details panel, you can download a PDF of the notice and print it out, should non-digital service be required.
4. Click Service Options to open a popup where you can resend digital notices (including editing the email) or certify service by an alternate method (see bullet 5)
5. Service options popup.
6. Select the service method you used. If it was a non-digital method, indicate the date of service.
 - a. Alternate options include Recorded mail; Acknowledgment of Service, and In person.

DES-0000501 — Balboa Pending Service Next More options

1 8 Documents

Notice(s) to beneficiaries and other interested parties

Grant applicants are required by law to serve the appropriate Notices to beneficiaries and other interested parties. The required notices are available for download below. If a beneficiary or interested party was included in the application with an email address for service, they have automatically been sent a notice via email.

Recipient	Type	Email address	Service method	Status	Action
Agnes Sui Lian Leeson	Recipient Notice	dennis@breenconsulting.ca	Digital service	Completed	PDF
Maria Sui Tjin Emery	Recipient Notice	dennis@breenconsulting.ca	Digital service	Completed	PDF
Laurence Liat Yam Lim	Recipient Notice	dennis@breenconsulting.ca	Digital service	Completed	PDF
Clarence Liat Chi Lim	Recipient Notice	dennis@breenconsulting.ca	---	Action Required	Service options

DES-0000501 — Balboa Pending Service Next More options

1 8 Documents

Notice(s) Notice details

Status

Action required
This person must be served. If they cannot be served via the digital service, other service options are available.

Recipient

Name of recipient: Clarence Liat Chi Lim
Notice recipient type: Beneficiary — residual share
Email address: dennis@breenconsulting.ca

Service history

Date	Status	Service method
Jan 9, 2023	Sent	
---	Action Required	

Download PDF Service options

5 Action required

Service options

Download notice (PDF)

Name: Clarence Liat Chi Lim
Email: dennis@breenconsulting.ca
Address for service: ---

Service options

The beneficiary or potential claimant named above must be served. If they cannot be served via the digital service, other service options are available.

Service method *

Cancel Next

Editing contact information for service

When an application is “Pending Service”, you can edit the contact information for beneficiaries and other interested parties. Go to Serve Notices (Step 11).

1. **“Service Options”** will launch a pop-up window where you can change the selected recipient’s contact info or service method.
2. **Recorded Mail:** Allows you to add or edit an address for service, so that you can certify that you have completed service to the selected recipient.
3. **Digital service:** Allows you to add or edit an email address for digital service. The notice will be generated digitally.

Notice(s) to beneficiaries and other interested parties

Grant applicants are required by law to serve the appropriate Notices to beneficiaries and other interested parties. The required notices are available for download below. If a beneficiary or interested party was included in the application with an email address for service, they have automatically been sent a notice via email.

Recipient	Type	Email address	Service method	Status	Action
JAMES DANIEL WEBSTER	Recipient Notice	ash.ly.tru@gmail.com	Digital service	📧 Pending	 Service options
Mary Lamb	Recipient Notice	marylamb@mail.c	Digital service	Invalid	Service options
Dorothy Lamb	Recipient Notice	---	---	🕒 Action Required	Service options

Service options

[Download notice \(PDF\)](#)

Name: **Mary Lamb** Email: **marylamb@mail.c**

Address for service: ---

Service options

The beneficiary or potential claimant named above must be served. If they cannot be served via the digital service, other service options are available.

Service method *

-  [Recorded mail](#)
-  [Digital service](#)
- [In person](#)
- [Other method, with Acknowledgement of service](#)

City: _____ Province: _____ Postal code *: _____

Serving the Public Trustee

SDS collects all the information needed to determine if the Public Trustee must be served and provides that service automatically.

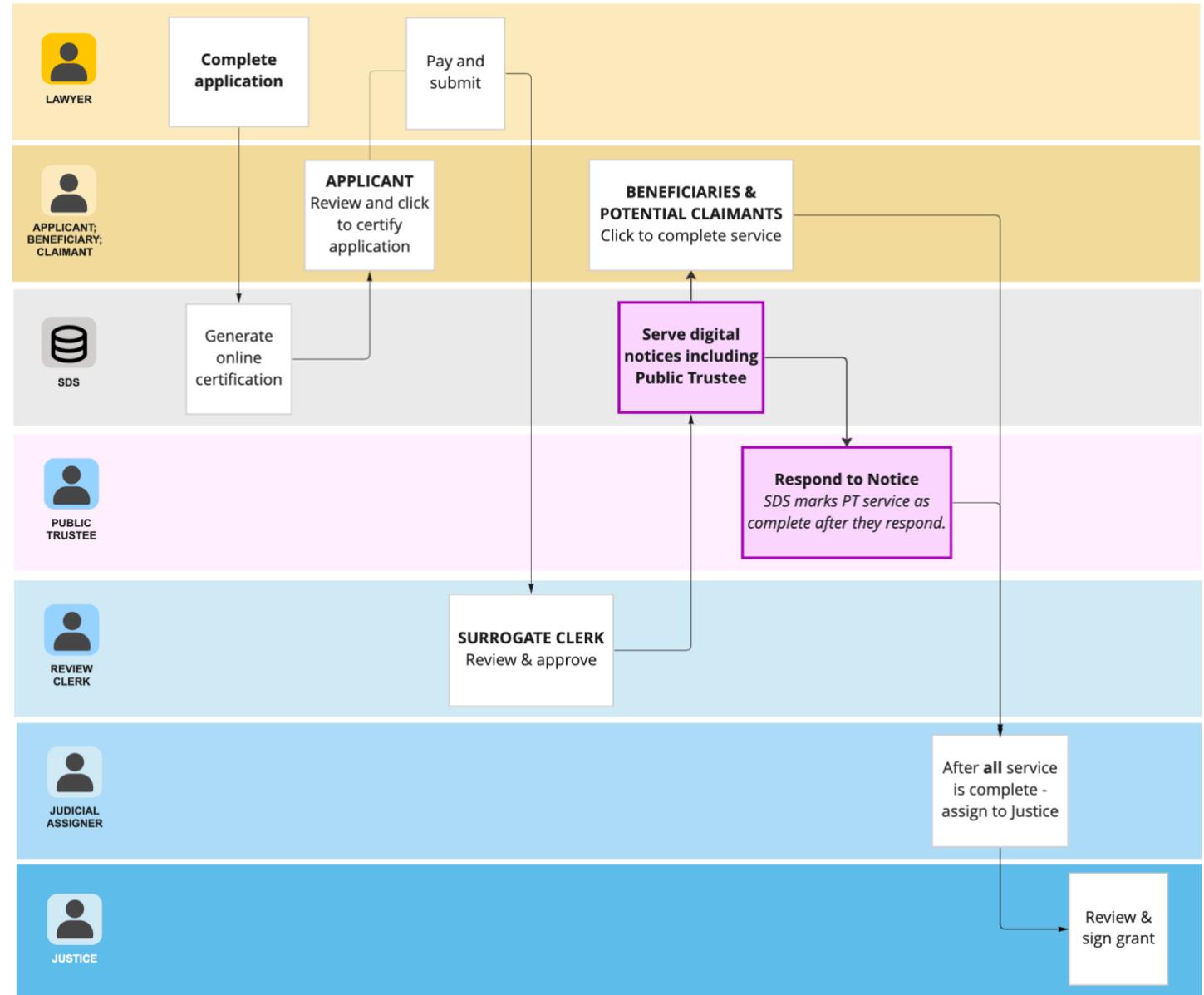
- **DO NOT** complete a GA4 and serve it on paper to the Public Trustee. It will be rejected and will slow the overall process.
- SDS automatically serves the Public Trustee only when there is a requirement to do so. You **cannot** choose to serve the Public Trustee out of an abundance of caution.

When Guardians for minors are added to an application, SDS serves them automatically, provided an email address has been entered.

Process

As illustrated on the right, all notices, including those to the Public Trustee, are served **after** clerk review. Service to the Public Trustee is not considered complete until they have submitted their response in SDS. When the Public Trustee responds, you will receive a notification email and you will be able to download their response from the documents panel of the application (See [Response from the Public Trustee](#)).

Applications requiring service to the Public Trustee will take longer to process than applications without that requirement.



Response from the Public Trustee

When the Public Trustee is served notice on an application, they review the notice and provide a response. The Public Trustee's response is made available to you in SDS.

1. When the Public Trustee completes their review, you will receive an email notification that the response is available. Sign into SDS to view the response.
2. The Public Trustee's response documents will be available in the Documents panel of the application. Click on "Documents" in the upper right (above the application process navigation) to open the Documents panel.

Alberta

Dear Dennis Breen,

The Public Trustee has reviewed your notice and provided a response to the Court.

You can log in to the Surrogate Digital Service at <https://d335v8z2ij69rx.cloudfront.net> to view or download a PDF of their response by going to the application's Documents tab.

Application Details

Grant type: Probate
 For the estate of Michael Collins
 Applicant(s): Edwin Aldrin Jr.

DES-0000586 — Collins Pending Final Decision Next More options

7 Documents

APPLICATION PROCESS

- Apply for grant
- Beneficiaries
- Potential claimants
- Inventory — deceased
- Inventory — jointly owned assets
- Review draft
- Certification
- Submit and pay
- Payment confirmation

Notice(s)

Grant application available for download automatically

Recipient

- Bootsy Collins
- Joan Collins
- Colin Collins
- Callie Collins
- Public Trustee

Grant of probate application

Document type	File name
Certified Application	CertifiedApplication_CollinsMichael.pdf
Notice to Beneficiaries and Other Interested Parties	DES-0000586_Notice_CollinsBootsy.pdf
Notice to Beneficiaries and Other Interested Parties	DES-0000586_Notice_CollinsColin.pdf
Notice to Beneficiaries and Other Interested Parties	DES-0000586_Notice_CollinsCallie.pdf
Notice to Beneficiaries and Other Interested Parties	DES-0000586_Notice_CollinsJoan.pdf
Public Trustee Letter	PublicTrusteeLetter_2023-02-06.pdf
Public Trustee response	DES-0000586_PublicTrusteeResponse_CollinsMichael.pdf

Recalling an application

If you need to make changes to an application after it's been sent for certification or clerk review you can recall it. Applications can be recalled when they are in one of the following statuses:

- Pending Certification
- Ready to Submit
- Submitted
- Pending Service

Recalling an application sets the status to "Draft", which allows you to make changes. After making changes:

- The applicant(s) must re-certify the application. Any previous certifications are invalid.
- If a clerk has already approved the application, Notices will be re-served. All previously completed service is invalid.
- If your changes result in a fee increase, you must pay before submitting the application.

Alberta Surrogate Digital Service Dashboard

Grant application — Ross Pending Certification

APPLICATION PROCESS

- ✓ Apply for grant
- ✓ Beneficiaries
- ✓ Potential claimants
- ✓ Inventory — deceased
- ✓ Inventory — jointly owned assets
- ✓ Review draft
- ✎ Certification

Applicant certification

All applicants must certify the application before it can be submitted by email if any applicants request changes.

Applicant	Type	Date sent	Expiry	Status
[Redacted]	Certified Application	Sep 11, 2022	Sep 14, 2022	Pending

[Re-send](#)

More options

- Refresh
- Recall**
- View History

Submitting the will and testamentary documents

For Probate or Administration with Will Annexed applications, the Will and other testamentary documents must be submitted **by Registered Mail only** to the Court for storage. You cannot download a Grant until the Court has received these documents - even if the application has been approved by a Justice.

Do not submit the will and testamentary documents until your application has been approved by a clerk.

1. **Submit will.** When your application is approved by a clerk, you will receive an email notice. Go to “Submit Will” to download a cover sheet that must be signed and attached to the will and testamentary documents that are submitted to the Court for storage.
2. Instructions for cover sheet.
3. Download the cover sheet. The responsible lawyer (or another lawyer in the same law office) must sign the certification statement on the cover sheet. The certification must be signed with an ink signature. It is not a digital certification.
4. Address where the documents must be **sent by Registered Mail only**.

As of April 8, 2024, all documents must be submitted to the Court via Registered Mail. Documents will no longer be accepted at the counter in any Judicial Centre, or by any other method.

DES-0001859 — Flintstone Admin: Will Annexed Pending Service Next More options

2 Documents

APPLICATION PROCESS

- 1 Apply for Grant
 - About the deceased
 - About the applicant(s)
 - About the nominator(s)
 - About the renunciant(s)
 - Other persons of equal or higher priority
 - Will and testamentary documents
 - Supporting documents
- Beneficiaries
- Potential claimants
- Inventory — deceased
- Inventory — jointly owned assets
- Review draft and send
- Certification
- Submit and pay
- Payment confirmation
- 10 Submit will 1
- 11 Serve notices
- 12 Grant approval

Submit will

The application has been accepted by the clerk.

3 [Download Cover Letter](#)

Print cover sheet 2

The Court must receive the will and other testamentary documents before you are able to download your Grant.

! As of April 8, 2024, the procedure for submitting Wills and other testamentary documents to the Courts has changed. All documents must be sent via Registered Mail, and will no longer be accepted at the counter in any Judicial Centre, or by any other method.

You can submit the will anytime after a clerk has approved your application, including when the status is “Pending Service”:

1. Print off the cover sheet for this application.
2. Attach it to the front of the document(s) you will be submitting to the Court which forms part of the will.
3. Make sure all documents match the digital version that has been submitted.
4. Sign the cover sheet to certify its correctness.
5. NEW: if you are submitting multiple wills in the same package, please append a first page to the package, indicating the number of wills being submitted.
6. Submit the documents to the Courts by Registered Mail to:

Mailing address

Attention: File Room - Wills Repository
Court of King's Bench
1A Sir Winston Churchill Square
Edmonton, AB T5J0R2 4

Downloading a grant

After a Justice approves your application AND the testamentary documents have been received for storage, you can download your grant. You can also download a letter explaining the new grant format, which can be supplied to banks and other institutions.

1. If your application included TBD values, you will see a reminder of the number of days since the grant was approved. SDS will email reminders to the lawyer, applicant and other interested parties after 90 and 180 days if the inventory has not been amended. After 180 days, SDS will send email reminders to the applicant every 30 days until the inventory is amended.
2. Indicator that your grant has been approved by a Justice.
3. Download the Notice of grant change letter, which explains the digital Grant format.
4. Download grant.

DES-0001745 — Hopper

Probate Draft: Amended Inventory More options

5 Documents

APPLICATION PROCESS

- Apply for Grant
- Beneficiaries
- Potential claimants
- Inventory — deceased
- Inventory — jointly owned assets
- Review draft and send
- Certification
- Submit and pay
- Payment confirmation
- Submit will
- Serve notices
- Grant approval

1 **!** Days since grant issued: 0

- The inventory has not yet been finalized to include the value of all estate assets and liabilities.
- TBD values must be updated when that information becomes available. The amended inventory must then be served to beneficiaries and others entitled to receive it.

2 **✓** Application approved

The application has been approved and a Grant has been issued.

Grant of Probate

[Download Notice of grant change PDF](#) [Download Grant PDF](#)

File number	Judicial centre	Date issued
DES-0001745	Edmonton	March 13, 2024
Deceased	Date of death	
Edward Hopper	Jan 4, 2024	

This order revokes any previous grants issued by the Court of King's Bench of Alberta in the estate of **Edward Hopper**.

And therefore, by order of the Honourable Justice John S. Little, dated March 13, 2024, the Court has granted probate of the attached will and codicil(s), and administration of all the deceased's property and digital assets to **Mark Rothko** the personal representative of the estate of **Edward Hopper**.

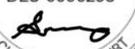
The grant

Digital grants have a different layout from paper grants.

1. **Certified copy stamp.** The date here refers to the date the grant was downloaded – not the date the grant was issued. This is essentially the date the certified copy was issued. It's possible for you to download multiple copies of the grant, each with their own certification date
2. **Seal:** Includes the Court file number and the issued date, which is the date that the Justice approved the grant application.
3. If the Justice has included any Directions, Limitations or Express Authorizations in the grant, they will be listed near the bottom.
 - a. If your application included any TBD values, the grant will automatically include a Direction to finalize the inventory and serve it to beneficiaries and other interested parties.
4. Justice's digitally applied signature.

CERTIFIED 
by the Court Clerk as a true copy of the document digitally issued on Sep 16, 2022. 1

 **Court of King's Bench of Alberta**
Surrogate Matters – Judicial Centre of Edmonton

GRANT OF THE COURT
Issued Sep 16, 2022
DES-0000298

CLERK OF THE COURT 2

Grant

Court:	Court of King's Bench of Alberta (Surrogate Matter)
Judicial centre:	Edmonton
Estate:	AOPE Sakarina KAWAKAMI; also known as Aya Sakarina KAWAKAMI
Date of death:	Jul 24, 2020

Information about the applicant

Name	Bridget Margaret O'Connell Sutherland, AKA Bridget O'Connell Sutherland
Address	1226-28 Street NW, Edmonton AB, T6K0K2, Canada
Email address	bsmith@smmconsulting.ca
Qualification to apply	Personal Representative named in the will

There are no previous grants issued in the estate of **AOPE Sakarina KAWAKAMI; also known as Aya Sakarina KAWAKAMI**.

And therefore, by order of the Honourable Justice **John S. Little**, dated September 16, 2022, the Court has granted probate of the attached will/codicil/list of all the deceased's property and digital assets to **Bridget Margaret O'Connell Sutherland**, the personal representative of the estate of **AOPE Sakarina KAWAKAMI; also known as Aya Sakarina KAWAKAMI**.

This grant is issued with the following:

Directions

- None

Limitations 3

- None

Express authorizations

- None

The personal representative has the authority to inquire into all joint assets and beneficiary designated assets of the deceased.

 4
Your real signature will not be used in Training Environment

Justice of the Court of King's Bench of Alberta

Amending an inventory with TBD values

Applications containing TBD values must be updated and the finalized inventory must be served to beneficiaries and other interested parties. TBD values can be updated as they become known, but SDS will only serve notices once all TBD values have been updated.

1. If an application includes TBD values, it will appear with a status of “Draft: Amended inventory” on the dashboard.
2. A notice will display the number of days since the grant was issued.
3. Only portions of the application related to inventory, certification, service and payment are editable. Other parts of the application **cannot** be edited after the grant is approved.
4. Navigate to the inventory item that needs to be updated. If it is Land and Minerals, you must update all values - Gross value, Mortgage, and Other encumbrances, even if some of them are zero.
5. You can remove items from the initial inventory or add new ones if necessary.

After all values are updated, go to “Submit and pay” to send the application to the applicant for certification. Once certified, notices will be re-served to beneficiaries and other interested parties. If you had to manually serve notices the first time you will need to do the same with the amended inventory.

SDS will email reminders to the lawyer, applicant and other interested parties after 90 and 180 days if the inventory has not been amended. After 180 days, SDS will send email reminders to the applicant every 30 days until the inventory is amended.

DES-0001745 — Hopper Probate Draft: Amended inventory 1 More options

5 Documents

APPLICATION PROCESS

- ✓ Apply for Grant
- ✓ Beneficiaries
- ✓ Potential claimants
- 4 Inventory — deceased 3
- 5 Inventory — jointly owned assets
- 6 Review draft and send
- 7 Certification
- ✓ Submit and pay
- ✓ Payment confirmation
- ✓ Submit will
- 11 Serve notices
- 12 Grant approval

1 Days since grant issued: 0 2

- The inventory has not yet been finalized to include the value of all estate assets and liabilities.
- TBD values must be updated when that information becomes available. The amended inventory must then be served to beneficiaries and others entitled to receive it.

✓ Application approved
The application has been approved and a Grant has been issued.

Grant of Probate Download Notice of grant change PDF Download Grant PDF

File number DES-0001745	Judicial centre Edmonton	Date issued March 13, 2024
Deceased Edward Hopper	Date of death Jan 4, 2024	

This order revokes any previous grants issued by the Court of King's Bench of Alberta in the estate of **Edward Hopper**.

And therefore, by order of the Honourable Justice John S. Little, dated March 13, 2024, the Court has granted probate of the attached will and codicil(s), and administration of all the deceased's property and digital assets to **Mark Rothko** the personal representative of the estate of **Edward Hopper**.

Value

Estimated gross value (\$) * Mortgage(s) (\$) * Other encumbrances (\$) * 4

TBD

Estimated net value
\$0.00

Remove 5

+ Add item

Amending an inventory without TBD values

Inventories can be voluntarily amended after the grant has issued.

1. Open the application, click on “More options” in the upper right and select “Amend inventory”
 - a. This will make change the application status to “Draft: Amended inventory” and allow you to make changes to the “Inventory – deceased” and “Inventory – jointly owned assets” sections. **Once you change this status you cannot change it back to “Approved” without resubmitting the application to the Court.**
 - b. You can change inventory values, update inventory details and add or delete assets, as required.

After all values are updated, go to “Submit and pay” to send the application to the applicant for certification. Once certified, notices will be re-served to beneficiaries and other interested parties. If you had to manually serve notices the first time you will need to do the same with the amended inventory.

If the revised value of the estate results in a higher fee, you will be prompted to pay the difference when you send it to the applicant. Previous fee payments are not refundable should the value of the estate be reduced.

DES-0000817 – Flanders Probate Approved

5 Documents

APPLICATION PROCESS

- ✓ Apply for Grant
- ✓ Beneficiaries
- ✓ Potential claimants
- ✓ Inventory – deceased
- ✓ Inventory – jointly owned assets

Application approved

The application has been approved and a Grant has been issued.

Grant of Probate

[Download Notice of grant change PDF](#)

File number	Judicial centre	Date issued
DES-0000817	Drumheller	April 26, 2023
Deceased	Date of death	
Ned Flanders	Jul 28, 2020	

Mor

- Refresh
- Recall
- Manage access
- Amend Inventory
- View History

Resubmitting an application that has been rejected by a Clerk

There are a limited number of reasons that a clerk may return an application for revisions.

1. If an application is returned by a clerk it will display on the dashboard with a status of “Rejected by clerk”.
2. When you open the application, the clerk’s notes will display at the top of the screen. Update the application as required.

To Resubmit

3. Click on **Review draft and send** (step 6) in the left navigation. You must go to this step to resubmit the application.
4. You can see the clerk rejection note again.
5. You have the option to include a response to the clerk with your re-submission.
6. Start the resubmission process by clicking “**Request certification**” to get the application certified again.

Once the applicant certifies, the application will be re-submitted for court review. Your previous payment will be honoured. If the estate value is greater than the initial submission, you may be prompted to pay the difference in the application fee.

Applications

Wills, estates & trusteeships

Date modified ↓	File number	Applicant(s)	Deceased	Status ▾
Jan 17, 2023	DES-0000497	Lee, Geoffrey	Shakespeare, William	Rejected by Justice 1

Grant Application — Fonzarelli Probate Rejected by clerk Check for Errors Save Progress Next More options

APPLICATION PROCESS

1 Apply for Grant

About the deceased

About the applicant(s)

About the renunciant(s)

Will and testamentary documents

Supporting documents

2 Beneficiaries

3 Potential claimants

4 Inventory — deceased

5 Inventory — jointly owned assets

6 Review draft and send

Clerk's annotations/review notes

Date
Mar 22, 2023, 11:59:01 AM

Rejection Comments
Rejected because ... **2**

The deceased

Full legal name of the deceased

First name*

Arthur

Middle name or initial

Last name*

Fonzarelli

Grant Application — Fonzarelli Probate Rejected by clerk Request certification More options

APPLICATION PROCESS

1 Apply for Grant

2 Beneficiaries

3 Potential claimants

4 Inventory — deceased

5 Inventory — jointly owned assets

6 Review draft and send **3**

7 Certification

8 Submit and pay

9 Payment confirmation

10 Submit will

Review Application

Please ensure all information is correct. Once submitted, the applicant(s) will receive an email that includes a link to review the application. They will be given the option to certify the application or decline and request changes.

Clerk's annotations/review notes

Date
Mar 22, 2023, 11:59:01 AM

Rejection Comments
Rejected because ... **4**

Respond to clerk (optional) **5**

Responding to Justice seeking clarification

When a Justice reviews your application, they may choose to “Seek Clarification”, rather than rejecting or approving it. When a Justice seeks clarification, you must submit a response, but **you cannot alter the application**.

1. The application will display on the dashboard with the status “Seeking Clarification”.
2. When you open the application, the Justice’s note will display at the top of the screen.
3. Click “Respond” to open a window where you can provide an answer to the Justice’s inquiry.
4. The popup displays the Justice’s note.
5. There is an open text field where you must enter a response.
6. If necessary, you can add supporting documents, which will be added to the digital file for the Justice’s review. Unlike testamentary documents, they will not be attached to the Will or Grant.
7. When finished, click “Submit”.

Once submitted, your response will usually be reviewed by the same Justice. When a Justice uses “Seek clarification”, the application does not need to be re-certified or notices re-served upon resubmission.

The screenshot displays the 'Applications' dashboard for 'Wills, estates & trusteeships'. A table lists applications, with one highlighted in red and labeled 'Seeking Clarification' (1). Below the table, the 'Review Application' page for 'DES-0000527 – Howell' is shown. The 'APPLICATION PROCESS' sidebar includes steps like 'Apply for Grant', 'Beneficiaries', 'Potential claimants', 'Inventory – deceased', 'Inventory – jointly owned assets', 'Review draft and send', 'Certification', and 'Submit and pay'. The 'Review Application' main area shows 'Justice annotations/review notes' with a date of 'Jan 23, 2023, 9:43:00 AM' and a comment 'Please make corrections' (2). A 'Respond' button (3) is visible. A 'Lawyer Response' popup is overlaid, showing the same 'Please make corrections' note (4) and a 'Response to Justice' text field (5) with a 'max 5000 characters' limit. Below the text field, there are instructions for 'Supporting documents (optional)' and an '+ Add Supporting Document' button (6). 'Cancel' and 'Submit' buttons are at the bottom right of the popup (7).

Resubmitting an application that has been rejected by a Justice

If your application is rejected by a Justice, it changes to an editable state so you can make changes. After a rejection, the application must be re-certified by applicants, and notices must be reserved before returning to Justice review.

1. The application displays on your dashboard with the status “Rejected by Justice”.
2. When you open the application, you will see a notice that the application has been rejected by a Justice.
3. The Justice’s rejection reasons display, followed by any annotations that were left by the reviewing clerk.
 - a. You can edit any part of the application, including uploaded documents.
4. After completing your revisions, click on Review draft and send (step 6) in the left navigation. This is the only screen from which you can respond to the Justice and send the application for certification.
5. Click Respond and a window will open. Describe the changes you made to the application. Once you’ve entered a response, the “Request certification” button will appear.
6. Click “Request certification”.
 - a. Your previous payment will be honoured.
 - b. After the applicant certifies, Notices will be generated and sent. You can track and manage notices as with your initial submission.
 - c. Once Notices have been served, the application will go back to the Justice for review. It will not be reviewed by a clerk again.
7. If necessary, you can edit your response before requesting certification. Once you have sent the application for certification, you can no longer edit your response to the Justice.

Applications
Wills, estates & trusteeships

Date modified	Lawyer file no.	File number	Applicant(s)	Deceased	Status
Mar 18, 2024	---	DES-0001672	Deadly, Oldest	Deadly, Guy	Rejected by Justice 1

DES-0001672 — Deadly Admin Rejected by Justice Check for Errors Save Progress Next More options

2 Documents

1 Your application has been rejected. 2
Please review the Justice's comments below, then make the necessary edits to your application. Before you can send the application to applicants for re-certification, you must enter a response to the Justice on Step 6. Once certified, beneficiaries and interested parties must be served notice. Your previous payment will be honoured, however, you may be required to pay additional fees depending on the changes to your request.
For detailed instructions, please refer to the [User Guide](#).

APPLICATION PROCESS

- 1 Apply for Grant
 - About the deceased
 - About the applicant(s)
 - About the nominator(s)
 - About the respondent(s)
 - Other persons of equal or higher priority
 - Supporting documents
- 2 Beneficiaries
- 3 Potential claimants
- 4 Inventory — deceased
- 5 Inventory — jointly owned assets
- 6 Review draft and send 4

Justice annotations/review notes

Date	Justice
Feb 1, 2024, 10:55:23 AM	John S. Little

Rejection Comments
This is the Justice's reason for rejection ... 3

The deceased

DES-0001672 — Deadly Admin Rejected by Justice More options

2 Documents

Justice annotations/review notes

Date	Justice
Feb 1, 2024, 10:55:23 AM	John S. Little

Rejection Comments
Last one. I promise.

Respond 5

DES-0001672 — Deadly Admin Rejected by Justice 6 Request certification More options

2 Documents

APPLICATION PROCESS

- 1 Apply for Grant
- 2 Beneficiaries
- 3 Potential claimants
- 4 Inventory — deceased
- 5 Inventory — jointly owned assets
- 6 Review draft and send
- 7 Certification
- 8 Submit and pay

Justice annotations/review notes

Date	Justice
Feb 1, 2024, 10:55:23 AM	John S. Little

Rejection Comments
Last one. I promise.

Date	Response By
Mar 18, 2024, 3:13:46 PM	Dennis Breen

Resubmission note
I have corrected the application as requested.

Edit response 7

Halted applications (due to caveat or conflicting application filed with the Court)

The caveat process takes place outside of SDS, other than the fact that an application in SDS can be halted. Caveats must be submitted on paper as they always have been.

If a clerk discovers a caveat or competing application prior to a Grant being approved by a Justice, they will Halt the application. When they do, lawyers receive an email notification.

When an application is ready to resume, you must contact the surrogate office at the Judicial Centre where the application was made. This must be done outside of SDS.

When they receive the notification to resume the application, the clerk will “unhalt” it so that it can be reviewed. At that point, they will either reject the application so that changes can be made or approve and move it to the next stage of the process (service of notices).

“What to expect” documents

Several documents are available to help law firms understand what their clients will experience when an application is processed in SDS. You can download these for your own reference, or email them to clients as appropriate:

- [What to expect as an **Applicant**](#)
- [What to expect as a **Beneficiary**](#)
- [What to expect as a **Potential Claimant**](#)
- [What to expect as a **Renunciant**](#)
- [What to expect as a **Nominator**](#)
- [What to expect as a **Person with Priority \(not renouncing\)**](#)

Screening criteria for applications in the digital service

Surrogate Digital Service accepts most probate, administration and administration with will annexed applications. Before submitting, lawyers must complete a series of screening and eligibility questions, designed to prevent them from submitting an application that the service cannot handle.

Lawyers answer screening questions to determine the grant type and must be able to answer yes to all the eligibility questions for that type before creating a new application. This screener must be completed at the start of a new application, or the lawyer cannot proceed.

Screening questions

Select from the following options to describe your application. The deceased:

- Left a **valid will**, or one that has been validated by Court order
- Left an **invalid will**, or one that has been invalidated by Court order
- Did not leave a will

Refer to Section 14 of the [Wills and Succession Act](#) to define "will"

Grant of Probate Questions

Eligibility questions

Select all that apply to your situation.

General

- This is not a request for a limited Grant.
- This is not a resubmission for a previously rejected NC/GA application.
- This is not a request for a full Grant, where a limited Grant was previously obtained using an NC/GA application.
- There is no prior Grant issued by a foreign court.
- The original will is in-hand.
- This application does not include a void gift.

Survivorship: If the will contains a survivorship clause you may start the application, but it cannot be certified or submitted until after the survivorship period has passed.

About the deceased

- The deceased habitually lived in Alberta and/or owned property (as defined in the [Estate Administration Act](#)) in Alberta, including real property and personal property.
- The deceased was at least 18 years old when the will was made.

About the applicant

- The applicant(s) is named as personal representative(s) in the deceased's will, or is named in the will as an alternate if the personal representative named in the will is incapable or unwilling to act.
- The applicant(s) are 18 years of age or over.
- At least one surviving applicant resides in Alberta.
- The applicant(s) are not a former spouse or partner of the deceased as defined in the [Wills and Succession Act](#), Section 25 (A provision in a will that appoints a spouse or AIP as executor is void, if after February 1, 2012 and after the will is executed, the marriage is terminated or the adult interdependent relationship ends).
- The applicant(s) have an active, current email address.

Grant of Administration Questions

Eligibility questions

Select all that apply to your situation.

About the applicant and nominator (where applicable)

- The applicant(s) and nominator(s) are 18 years of age or over.
- At least one surviving applicant resides in Alberta.
- The applicant(s) have an active, current email address.

About the deceased

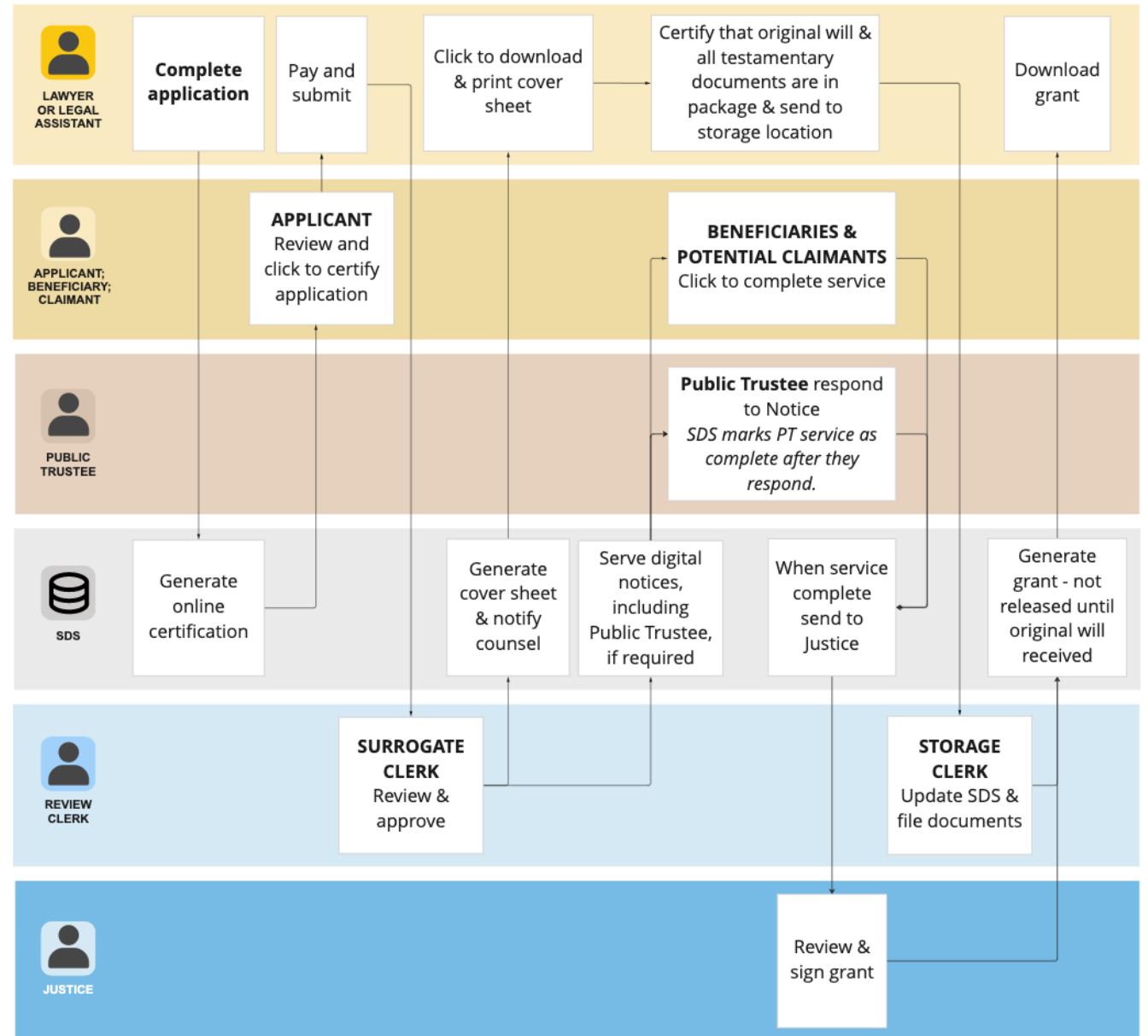
- The deceased habitually lived in Alberta and/or owned property (as defined in the [Estate Administration Act](#)) in Alberta, including real property and personal property.
- The deceased was at least 18 years old when they died.

General

- This is not a request for a limited Grant.
- This is not a resubmission for a previously rejected NC/GA application
- This is not a request for a full Grant, where a limited Grant was previously obtained using an NC/GA application.
- There is no prior Grant issued by a foreign court.

The Grant application process in Surrogate Digital Service

1. Lawyers prepare the initial application with input from the applicant(s).
2. Once the initial application is complete, the lawyer sends a digital version of the entire application, including will (if any) and other documents, to the applicant(s) for review. Applicants can certify the completeness of the submission with one click. There is no need for them to swear a separate affidavit.
3. After the applicant certifies, the lawyer pays with a credit card and submits the application to the Court.
4. A clerk will conduct the two-stage review and either return the application to the lawyer for revisions or approve and send it for Justice review.
5. After clerk approval, SDS automatically:
 - a. Generates a file number
 - b. Serves digital notices to beneficiaries, potential claimants and the Public Trustee, if required
 - c. Notifies the lawyer that they can print a cover sheet and submit their original documents.
 - d. The clerk doesn't need to do anything to make these things happen. They happen automatically when clerk review is complete.
6. The lawyer will print the cover sheet, attach it to the original documents and send it to the storage location. The package must be sent directly to the central storage location in Edmonton.
7. After all notices have been successfully served (and, if served, the Public Trustee has responded), the application will show up on the Judicial Assignment screen.
8. After assignment, the Justice will approve or reject the application.
9. After Justice approval AND acceptance of the original documents, SDS will automatically notify the lawyer, who can download a copy of the grant.



Applicant certification statement - Probate or Admin with Will Annexed – ORIGINAL WILL AND TESTAMENTARY DOCUMENTS

When an applicant certifies an application for a Grant of Probate or Grant of Administration with Will Annexed that includes all original testamentary documents, they must agree to the following statement:

You are required to certify the statements below are true before your lawyer can submit your application to the Court. Ensure you have carefully reviewed the information in the application, the documents to be submitted with it and that you agree with the statements below. **Certifying statements in an application to the Court to be true, knowing that they are not, can result in severe consequences, including being held in contempt of Court and/or being found guilty of an offence.**

I, {**Applicant name**}, the applicant, certify the following statements are true:

1. All information contained in this grant application is true to the best of my knowledge and belief.
2. Submitted with this application is:
 - a. a true copy of the Death Certificate or Funeral Directors Statement of Death for the deceased;
 - b. a true copy of the original will which I believe is the last will made by the deceased. I do not know of any later will; and
 - c. if applicable, a true copy of the original codicil or codicils, and true copies of any other documents that form part of the will.
3. I undertake to file the original will, and if applicable, the original codicil or codicils and originals of any other documents that form part of the will, with the Court.
4. I acknowledge that I am required by law to carry out the core tasks of a personal representative, which include
 - a. identifying the estate assets and liabilities,
 - b. administering and managing the estate,
 - c. satisfying the debts and obligations the estate, and
 - d. distributing and accounting for the administration of the estate.

I further acknowledge the core tasks of a personal representative may include but are not limited to, those activities described in the Schedule to the Estate Administration Act. I have reviewed the current version of the Schedule.

5. I acknowledge that I am required by law to perform my role as personal representative
 - a. honestly and in good faith,
 - b. in accordance with the Deceased's intentions and with the will and codicils, and
 - c. with the care, diligence and skill that a person of ordinary prudence would exercise in comparable circumstances where a fiduciary relationship exists.

I further acknowledge that I may be required by law to exercise a greater degree of skill if because of my profession, occupation or business, I possess or ought to possess a particular degree of skill that is relevant to the performance of my role of personal representative and that is greater than that which a person of ordinary prudence would be expected to exercise in dealing with the property of another person.

6. I undertake to give notice of this grant application to all persons entitled to receive notice according to law.
7. I undertake to serve an inventory of the Deceased's assets and liabilities on all persons entitled to receive one according to law. I undertake to file proof of service of the inventory as required.
8. If the value of any asset or debt listed in the inventory served by me is described as "to be determined", I undertake to serve an amended inventory on all persons entitled to receive one according to law when updated information becomes available. I undertake to file proof of service of the amended inventory as required.
9. I acknowledge that as personal representative, I am required by law to distribute the estate as soon as practicable.
10. I will not distribute any property to a trustee described in Form GA20 until the trustee has signed an Affidavit of Trustee in Form GA20, which I undertake to retain.
11. I undertake to notify all beneficiaries and persons with potential claims against the estate who have been identified in this grant application by providing them with a notice of grant issuing when the grant has issued.
12. I will faithfully administer the Deceased's estate according to law and will give a true accounting of its administration to the persons entitled to it when lawfully required.

I certify all of the above statements are true.

Applicant certification statement - Probate or Admin with Will Annexed – COPY OF ONE OR MORE TESTAMENTARY DOCUMENTS

When an applicant certifies an application for a Grant of Probate or Grant of Administration with Will Annexed that includes a copy of any testamentary documents, they must agree to the following statement:

You are required to certify the statements below are true before your lawyer can submit your application to the Court. Ensure you have carefully reviewed the information in the application, the documents to be submitted with it and that you agree with the statements below. **Certifying statements in an application to the Court to be true, knowing that they are not, can result in severe consequences, including being held in contempt of Court and/or being found guilty of an offence.**

1. I, **{Applicant name}**, the applicant, certify the following statements are true:
2. All information contained in this grant application is true to the best of my knowledge and belief.
 - a. Submitted with this application is:
 - b. a true copy of the Death Certificate or Funeral Directors Statement of Death for the deceased;
 - c. a true copy of the original will which I believe is the last will made by the deceased. I do not know of any later will; and
3. if applicable, a true copy of the original codicil or codicils, and true copies of any other documents that form part of the will.
4. I undertake to file the original will, and if applicable, the original codicil or codicils and originals of any other documents that form part of the will, with the Court.
 - a. I acknowledge that I am required by law to carry out the core tasks of a personal representative, which include
 - b. identifying the estate assets and liabilities,
 - c. administering and managing the estate,
 - d. satisfying the debts and obligations the estate, and
 - e. distributing and accounting for the administration of the estate.

I further acknowledge the core tasks of a personal representative may include but are not limited to, those activities described in the Schedule to the Estate Administration Act. I have reviewed the current version of the Schedule.

5. I acknowledge that I am required by law to perform my role as personal representative
 - a. honestly and in good faith,
 - b. in accordance with the Deceased's intentions and with the will and codicils, and
 - c. with the care, diligence and skill that a person of ordinary prudence would exercise in comparable circumstances where a fiduciary relationship exists.

I further acknowledge that I may be required by law to exercise a greater degree of skill if because of my profession, occupation or business, I possess or ought to possess a particular degree of skill that is relevant to the performance of my role of personal representative and that is greater than that which a person of ordinary prudence would be expected to exercise in dealing with the property of another person.

6. I undertake to give notice of this grant application to all persons entitled to receive notice according to law.
7. I undertake to serve an inventory of the Deceased's assets and liabilities on all persons entitled to receive one according to law. I undertake to file proof of service of the inventory as required.
8. If the value of any asset or debt listed in the inventory served by me is described as "to be determined", I undertake to serve an amended inventory on all persons entitled to receive one according to law when updated information becomes available. I undertake to file proof of service of the amended inventory as required.
9. I acknowledge that as personal representative, I am required by law to distribute the estate as soon as practicable.
10. I will not distribute any property to a trustee described in Form GA20 until the trustee has signed an Affidavit of Trustee in Form GA20, which I undertake to retain.
11. I undertake to notify all beneficiaries and persons with potential claims against the estate who have been identified in this grant application by providing them with a notice of grant issuing when the grant has issued.
12. I will faithfully administer the Deceased's estate according to law and will give a true accounting of its administration to the persons entitled to it when lawfully required.

I certify all of the above statements are true.

Applicant certification statement - Administration

When an applicant certifies an application for a Grant of Administration they must agree to the following statement:

You are required to certify the statements below are true before your lawyer can submit your application to the Court. Ensure you have carefully reviewed the information in the application, the documents to be submitted with it and that you agree with the statements below. **Certifying statements in an application to the Court to be true, knowing that they are not, can result in severe consequences, including being held in contempt of Court and/or being found guilty of an offence.**

I, **[Applicant name]**, the applicant, certify the following statements are true:

1. All information contained in this grant application is true to the best of my knowledge and belief.
2. Submitted with this application is a true copy of the Death Certificate or Funeral Directors Statement of Death for the deceased;
3. I acknowledge that I am required by law to carry out the core tasks of a personal representative, which include
 - a. identifying the estate assets and liabilities,
 - b. administering and managing the estate,
 - c. satisfying the debts and obligations the estate, and
 - d. distributing and accounting for the administration of the estate.

I further acknowledge the core tasks of a personal representative may include but are not limited to, those activities described in the Schedule to the Estate Administration Act. I have reviewed the current version of the Schedule.

4. I acknowledge that I am required by law to perform my role as personal representative
 - a. honestly and in good faith,
 - b. with the care, diligence and skill that a person of ordinary prudence would exercise in comparable circumstances where a fiduciary relationship exists.

I further acknowledge that I may be required by law to exercise a greater degree of skill if because of my profession, occupation or business, I possess or ought to possess a particular degree of skill that is relevant to the performance of my role of personal representative and that is greater than that which a person of ordinary prudence would be expected to exercise in dealing with the property of another person.

5. I undertake to give notice of this grant application to all persons entitled to receive notice according to law.
6. I undertake to serve an inventory of the Deceased's assets and liabilities on all persons entitled to receive one according to law. I undertake to file proof of service of the inventory as required.
7. If the value of any asset or debt listed in the inventory served by me is described as "to be determined", I undertake to serve an amended inventory on all persons entitled to receive one according to law when updated information becomes available. I undertake to file proof of service of the amended inventory as required.
8. I acknowledge that as personal representative, I am required by law to distribute the estate as soon as practicable.
9. I undertake to notify all beneficiaries and persons with potential claims against the estate who have been identified in this grant application by providing them with a notice of grant issuing when the grant has issued.
10. I will faithfully administer the Deceased's estate according to law and will give a true accounting of its administration to the persons entitled to it when lawfully required.

I certify all of the above statements are true.

Renunciant certification statement

When a PR renounces, they must agree to the following statement:

You are required to certify the statements below are true before the applicant's lawyer can submit the application to the Court. Ensure you have carefully reviewed the information in the application, the documents to be submitted with it and that you agree with the statements below. **Certifying statements in an application to the Court to be true, knowing that they are not can result in severe consequences, including being held in contempt of court and/or being found guilty of an offence.**

I, {Renunciant name}, certify the following statements are true. Where the information is based on advice or information and belief, this is stated.

1. I am a person that may apply to the Court of King's Bench of Alberta for a grant under section 13(1) of the Estate Administration Act to administer the estate.
2. I do not wish to serve as the Deceased's personal representative.
3. I renounce my entitlement to apply for a grant.
4. I have not intermeddled in the Deceased's estate.

I certify all of the above statements are true.

Nomination certification statement

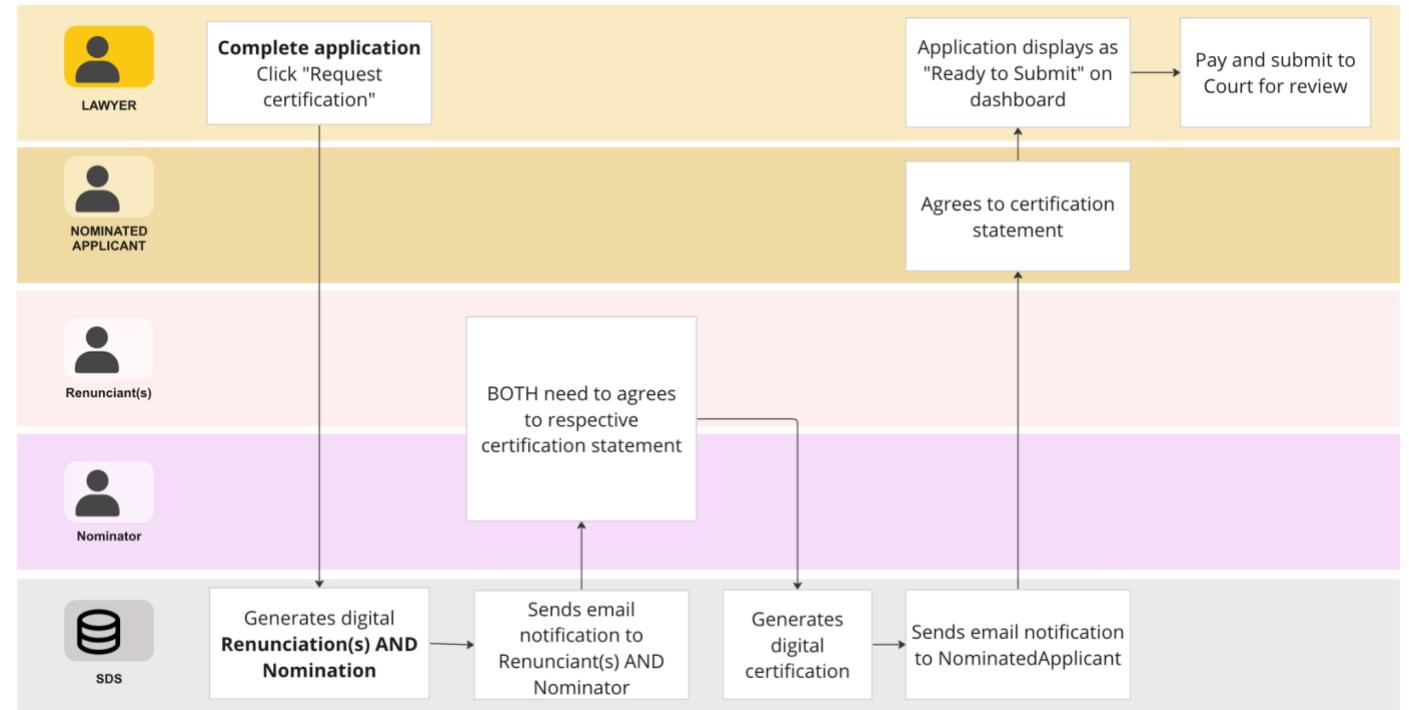
When a PR nominates an applicant, they must agree to the following statement:

You are required to certify the statements below are true before the applicant's lawyer can submit the application to the Court. Ensure you have carefully reviewed and agree with the statements below. **Certifying statements in a Court application when you know they are not true can result in severe consequences, including being held in contempt of court and/or being found guilty of an offence.**

I, {Nominator name}, certify the following statements are true. Where the information is based on advice or information and belief, this is stated.

1. I am a person that may nominate a person to administer the estate of {Estate name} under section 13(4) of the Estate Administration Act.
2. I nominate {Nominee name(s)} to apply for a grant.

Digital renunciation or nomination process



Lawyer's certification statement for will and testamentary documents

When a lawyer submits a will and other testamentary documents to the Court for storage, they must sign the following statement with a wet signature on a cover sheet generated by Surrogate Digital Service:

I certify that the attached documents, which are also described below, are all the documents required to be provided to the Court in the Grant application described above and that true digital scans of these documents were uploaded to the Surrogate Digital Service and filed digitally with the Court on **{Date of application submission}**

Originals of documents submitted with digital application (EXCEPT proof of death)

- *The Will and each testamentary document included in the application will be listed.*
- *For each document, there will be an indication of whether it is an original or a true copy.*

Date

Signature of responsible lawyer

Print name