Objective Connect - External clients

Probates – Wills and Letters of Administration

Contents

> **Please Note:**
>
> Objective connect is no longer available for new applications.
>
> Legal practitioners can now lodge wills and estates applications electronically through the Queensland Courts and Tribunals Online Services Portal.

Getting started

Objective Connect is a new file sharing platform used by the Supreme and District Courts. This guide is for practitioners using the platform to lodge Probates and Estate Applications.

This document will provide useful information regarding the types of tasks users are expected to complete within the system and how users are able to complete these actions. This includes:

- lodging Probate applications and supporting documentation
- electronically receiving sealed documents
- electronically receiving Grant of Probate.

The intention is to, where practicable, remove the need for physical (face-to-face) contact with the court registries.
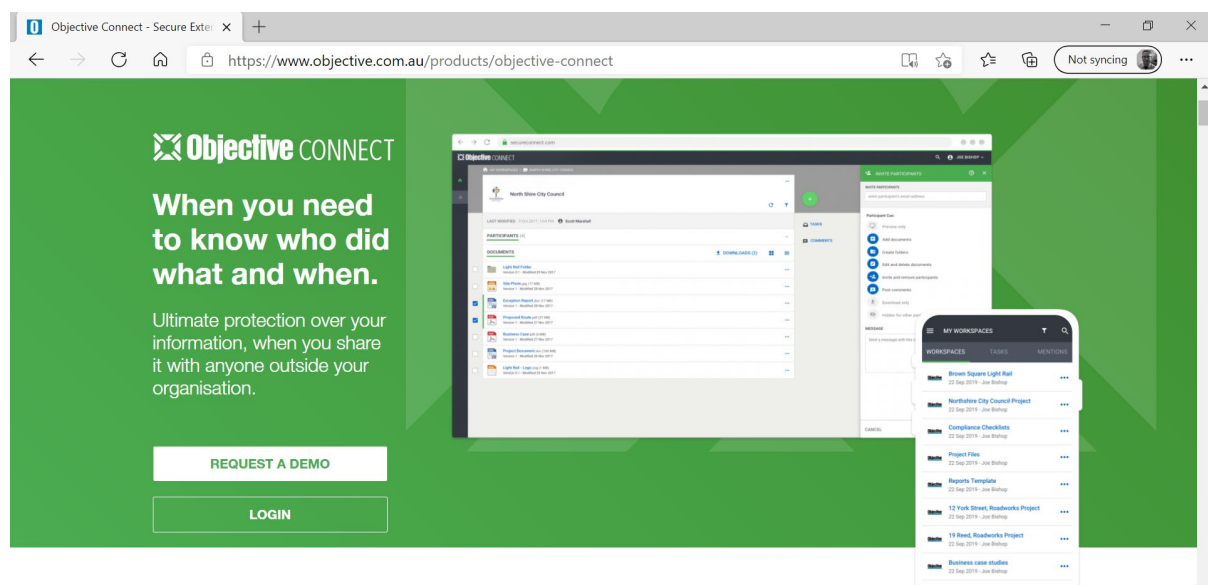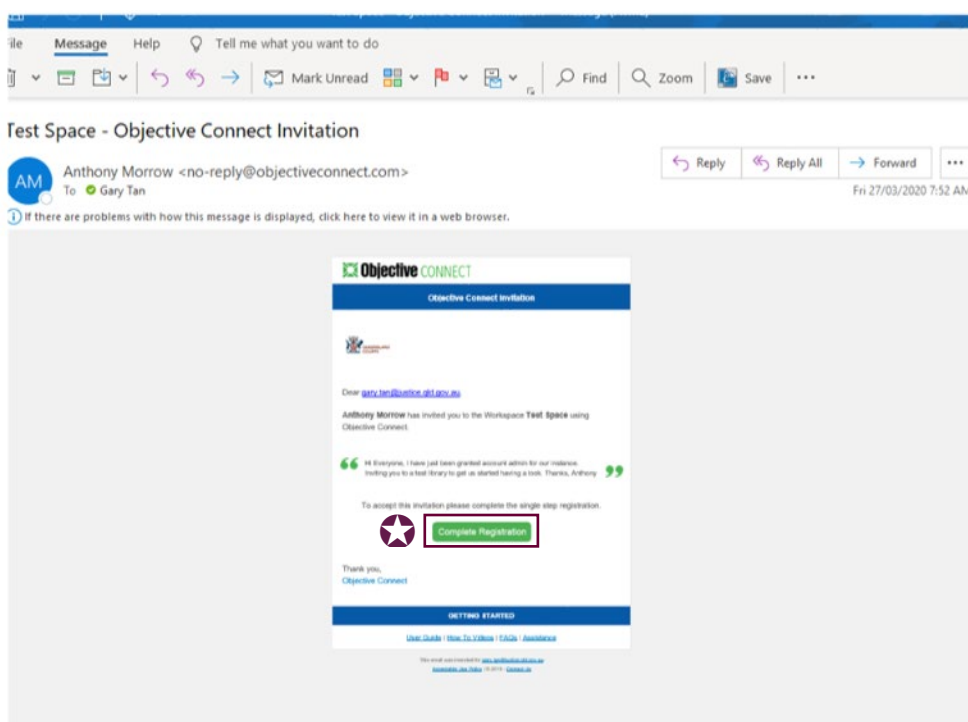
Request access

To request access to Objective Connect, send an email to Wills.Estates@justice.qld.gov.au with the following information:

- first and last names
- email address
- law firm
- reason for access.

Once your access has been approved, you will receive an invite to your firm's workspace. Click 'Complete registration' to access Objective Connect.
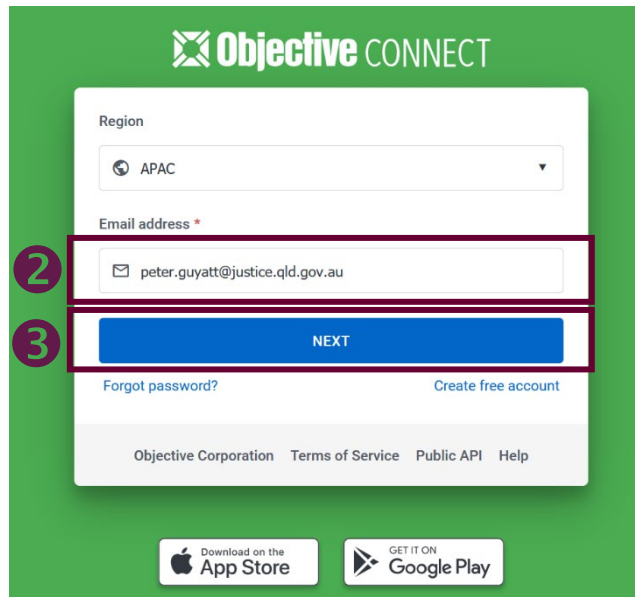

Note:

- When requesting access, please do so from your law firm's email address to ensure a quick turnaround for providing and approving access to Objective Connect.
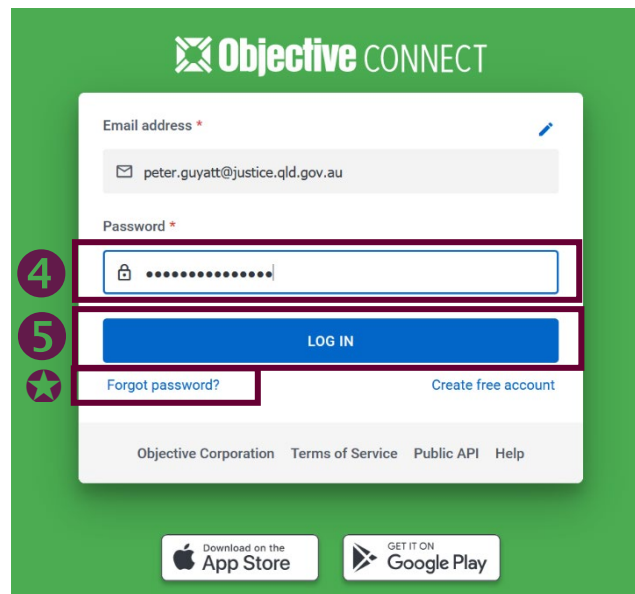
Logging in

1. Navigate to [Objective Connect.](https://secure.objectiveconnect.com/login) (https://secure.objectiveconnect.com/login)

2. Input your email address.
3. Click 'Next'.

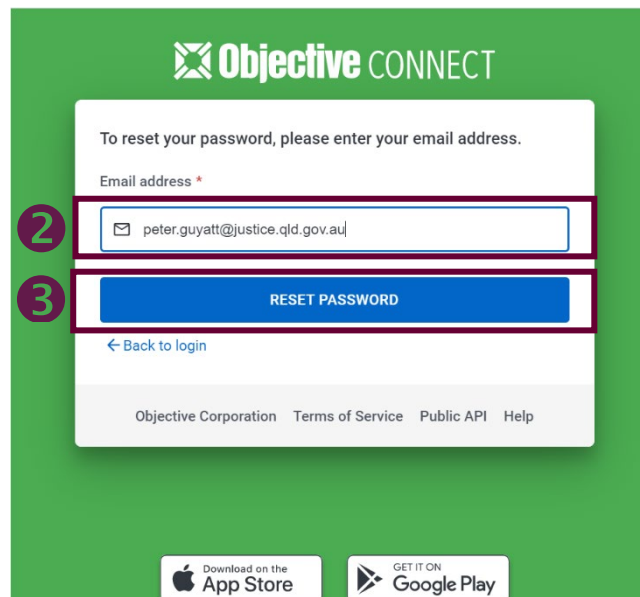4. Input your password.
5. Click 'Log in'.

Note:

- You are able to reset your password by clicking 'Forgot password'.
- You will not be able to sign-up using the 'Sign up for free' button unless you have previously been invited to Objective Connect.

Forgot password

1. If you have forgotten your password, click 'Forgot password?' on the Objective Connect login screen.

2. Input your email address you used to sign-up.
3. Click 'Reset password'.
4. You will receive a password reset code in your email.

5. Enter the password reset code into the prompt.
6. Then create a new password.
7. Click 'Login'.

Adjust personal settings
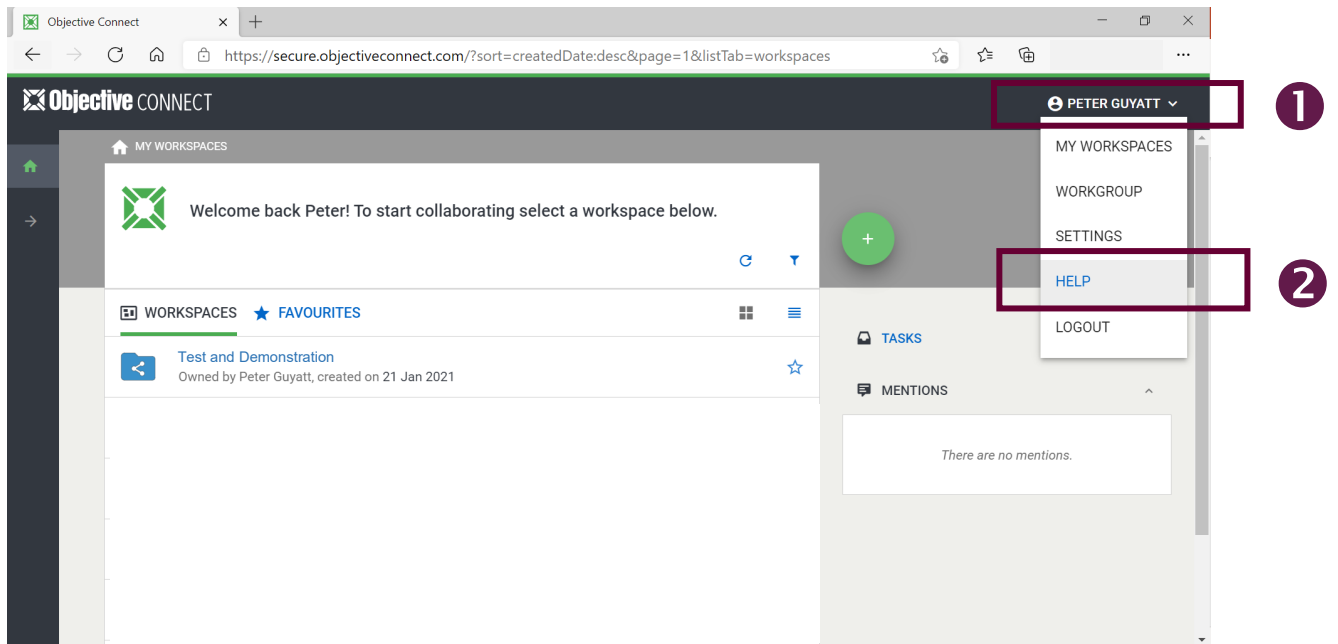
1. From any screen within Objective Connect, click on your name (top right).
2. Click 'Settings'.
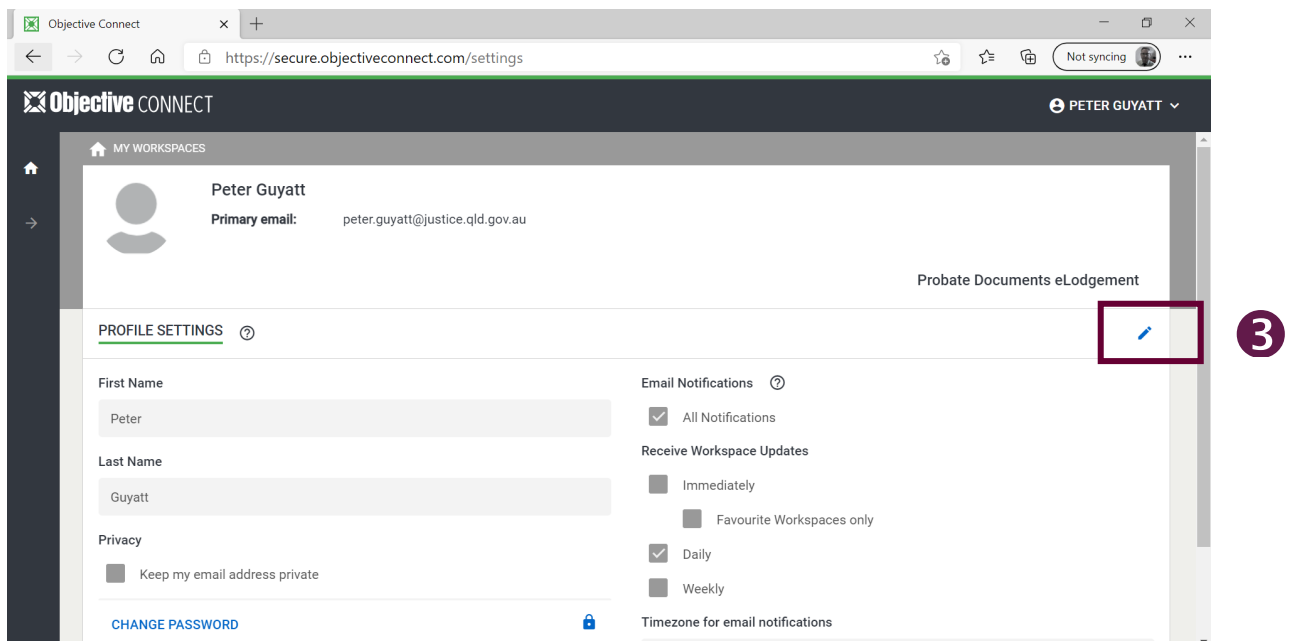
3. Click the edit icon ( ).

4. You are now able to edit the following:
   - first name
   - last name
   - privacy (hide email address)
   - change password
   - amend email notification settings
   - time zone for email notifications.
5. Click the tick (or cross) icon to save (or cancel).

Using a workspace
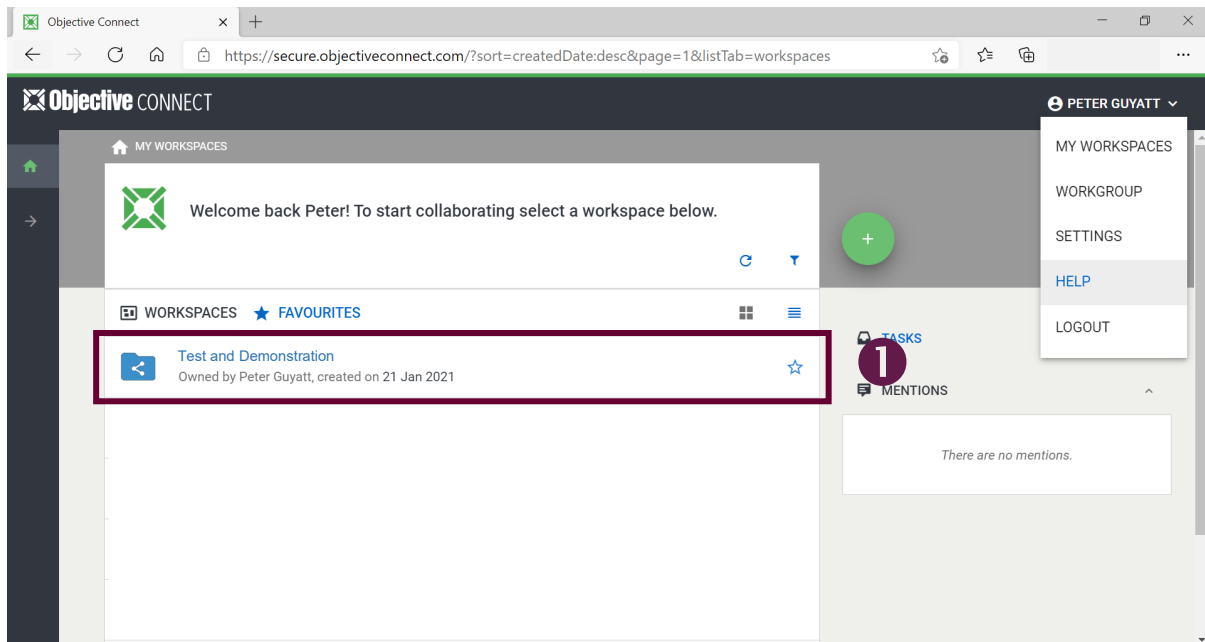
1. When you log in successfully, you will see all workspaces you belong to. Each law firm is set up with an individual workspace so you will only see your law firm.
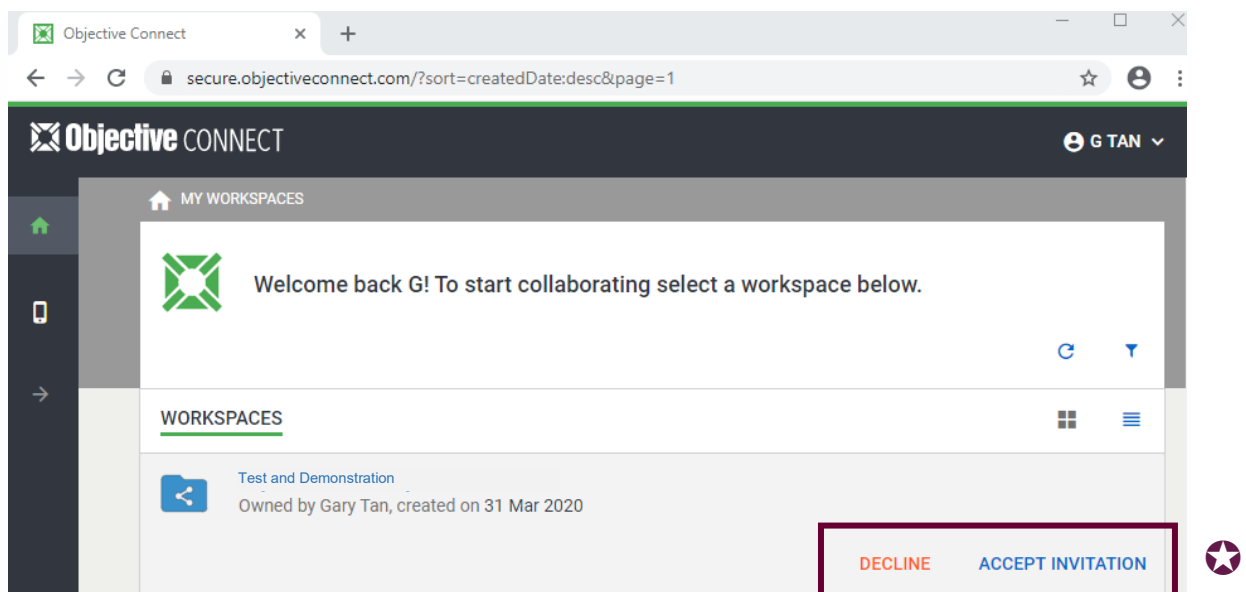
Note:

- The first time you log in you may receive an invitation to 'Accept invitation' or 'Decline' access to a workspace. Click 'Accept invitation'.

2. Click your law firm's workspace.
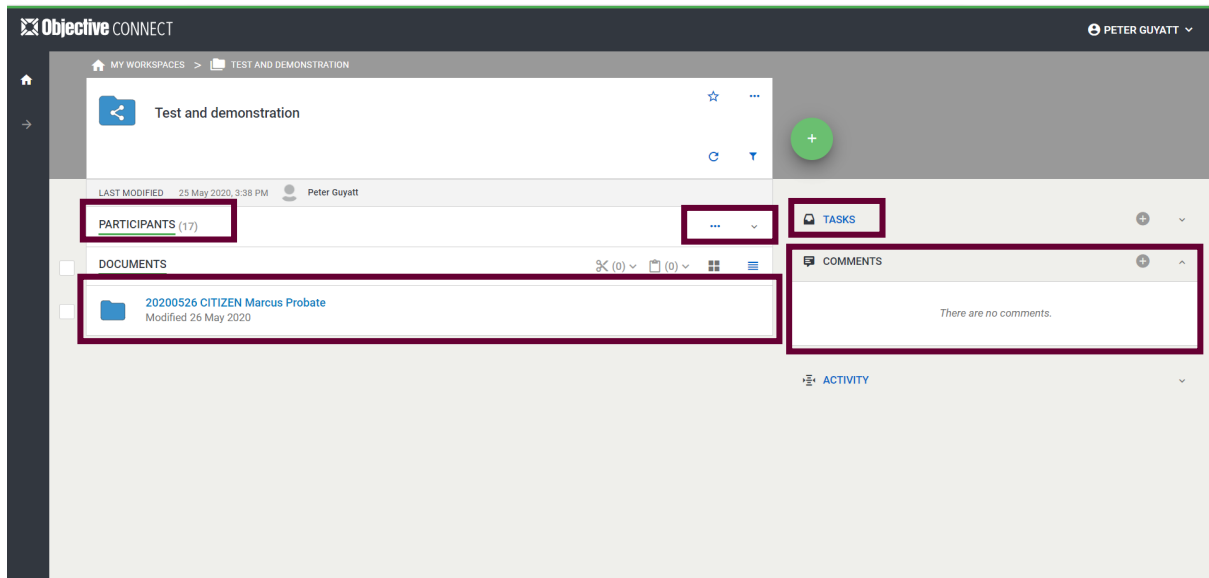
3. Within the workspace, you are able to see:

- participants (and their email address)

- participant permissions (••• ⌄)

- folders and documents

- tasks

- comments.

Create a new folder

In the Electronic Lodgement of Estate Applications Protocol, the Principal Registrar has mandated a separate folder is to be created in the law firm's workspace within Objective Connect for each Probate Application.

1. Within your workspace, click the green plus symbol on the bottom right of the screen.
2. Click 'Create'.
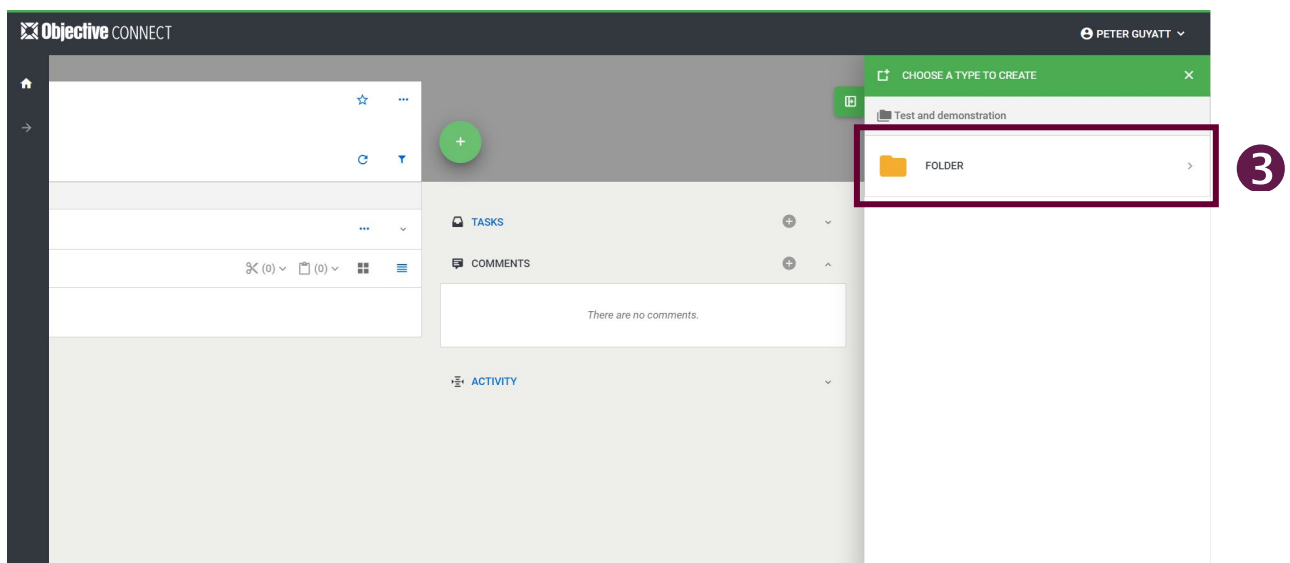
3. Click 'Folder' when it prompts you to 'Choose a type to create'.
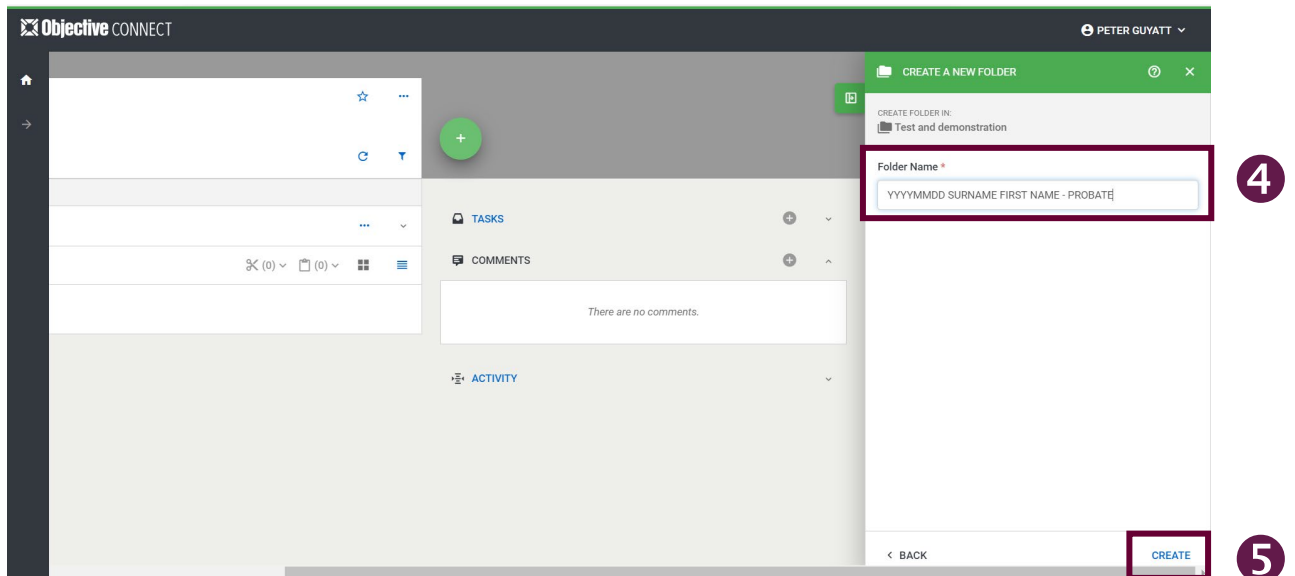
4. Using the naming convention, enter the name of a new folder.

5. Click 'Create'.
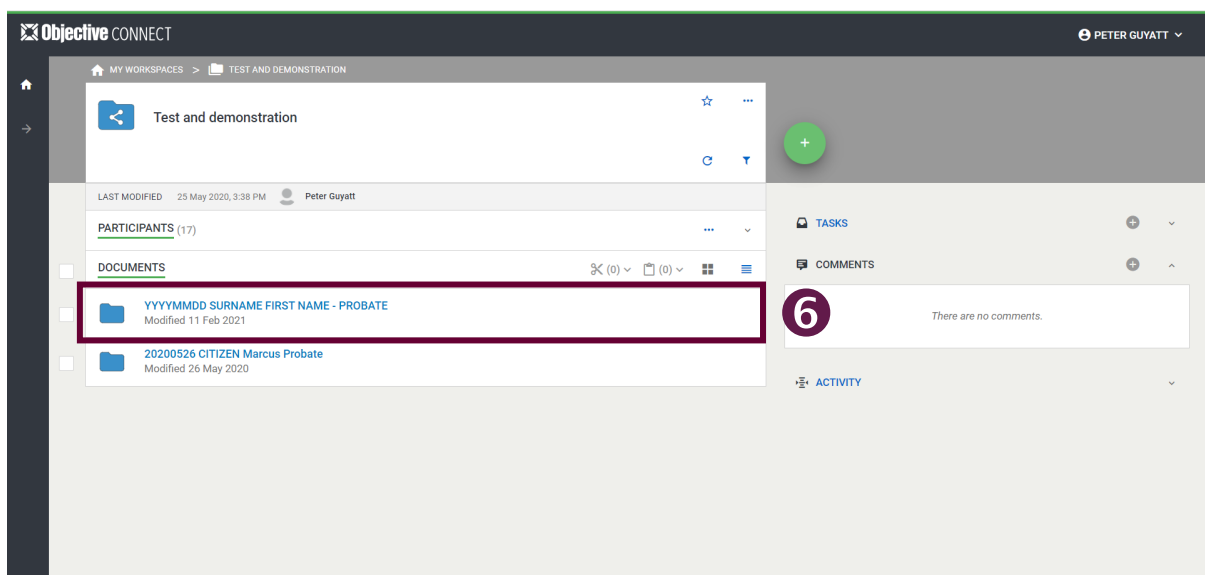
6. The new folder will now be visible under the documents subheading within your workspace.

Add a document to a folder
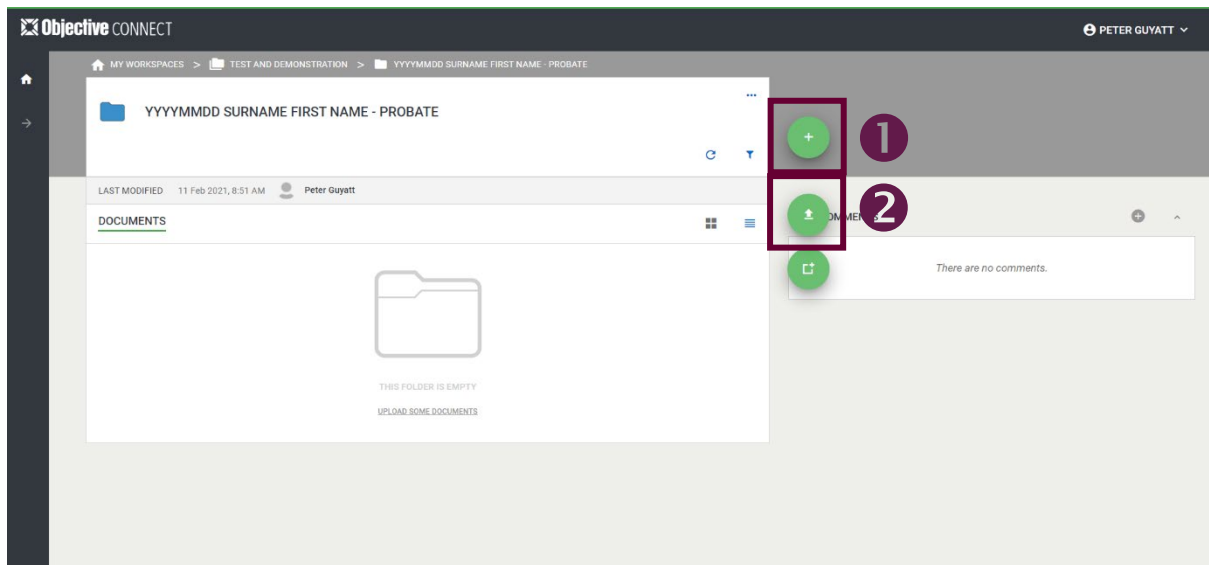
1. Within the folder you created for a matter, click the green plus symbol.
2. Click 'Add documents'.
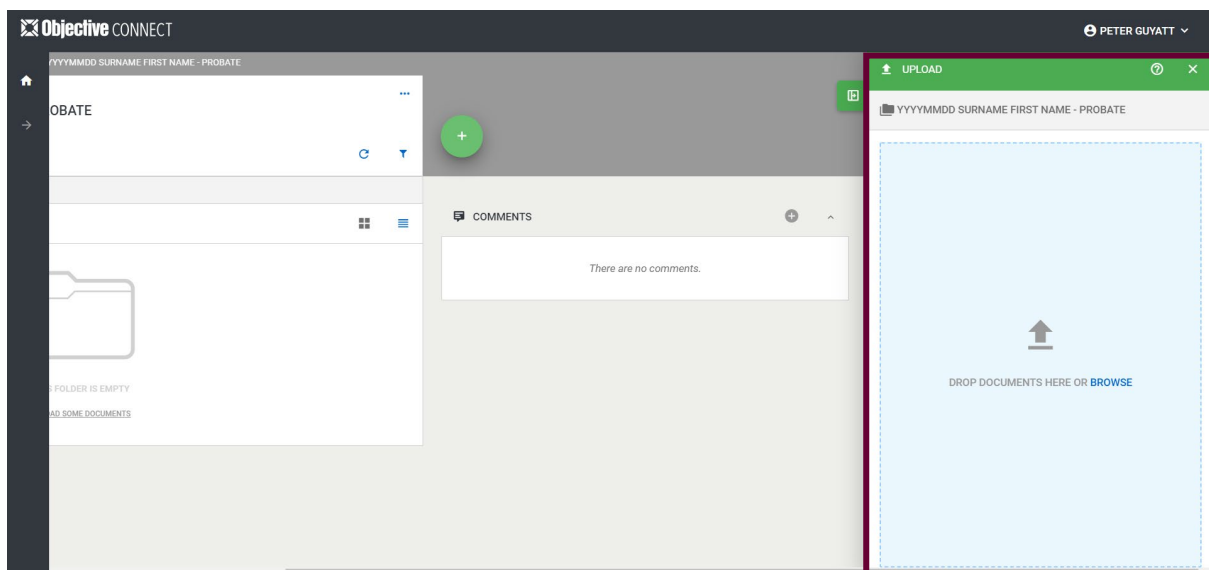
3. Ensure that the naming convention for documents is followed when uploading files. If you are adding multiple documents, ensure that they have been zipped (compressed) together. If you are not sure how to do this, instructions are available from Microsoft.
4. Drag and drop or browse to add a document.
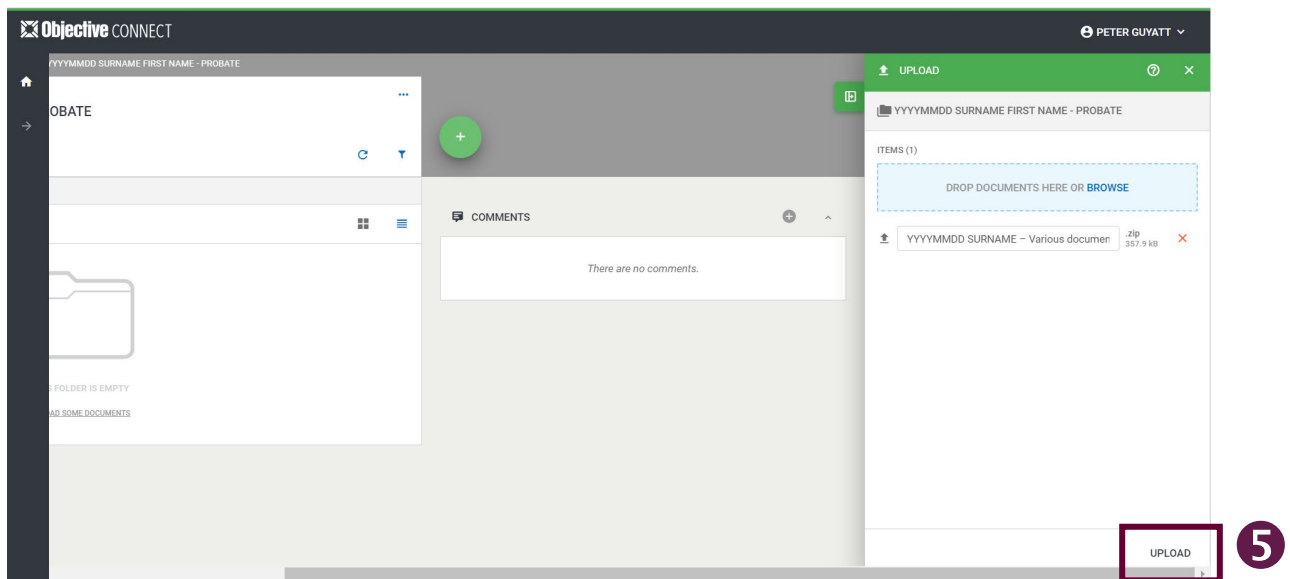
5. Click 'Upload' when you are ready.
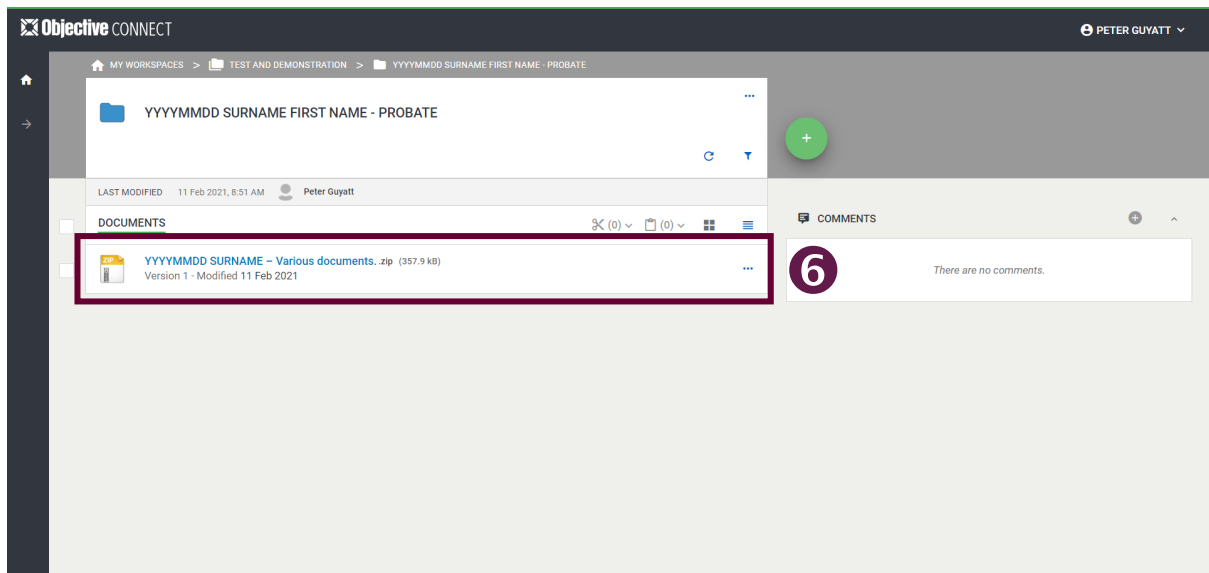
6. Files will now be visible under 'Documents' within the folder you added the file to.

7. Once your files have been uploaded into Objective Connect, a Registry staff member will assess them and register it within the Courts Civil Case Management system. An electronic seal will then be applied and the document will be uploaded into Objective Connect as a new version.

Downloading a file

If requested only, the Registry will provide sealed copies of documents via Objective Connect. These will appear as a new version of a document you have previously submitted.

The Registrar may also send a Notice of Requisitions via Objective Connect. This document will appear as a new document in the matter's folder.
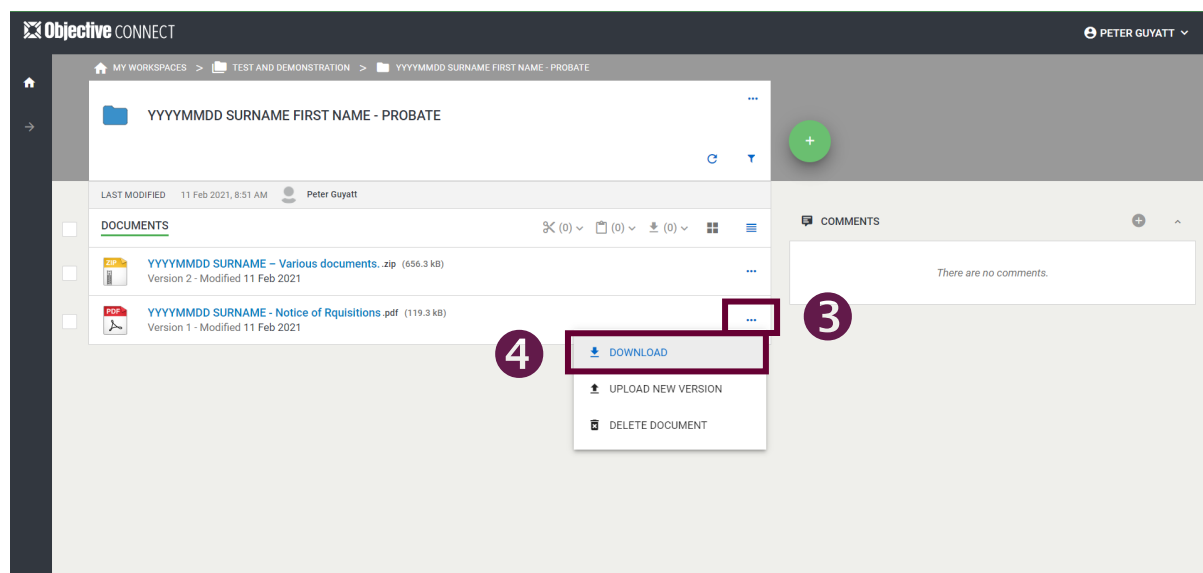
1. Navigate to the folder where you uploaded probate documents.

2. Locate the document and, if applicable, look for the version number.

3. Use the "…" icon to display options for that document.

4. Click 'Download' to obtain a copy for your records.

Note:

▪ Once a matter is finalised, you are able to delete the documents from a folder.

Deleting a document
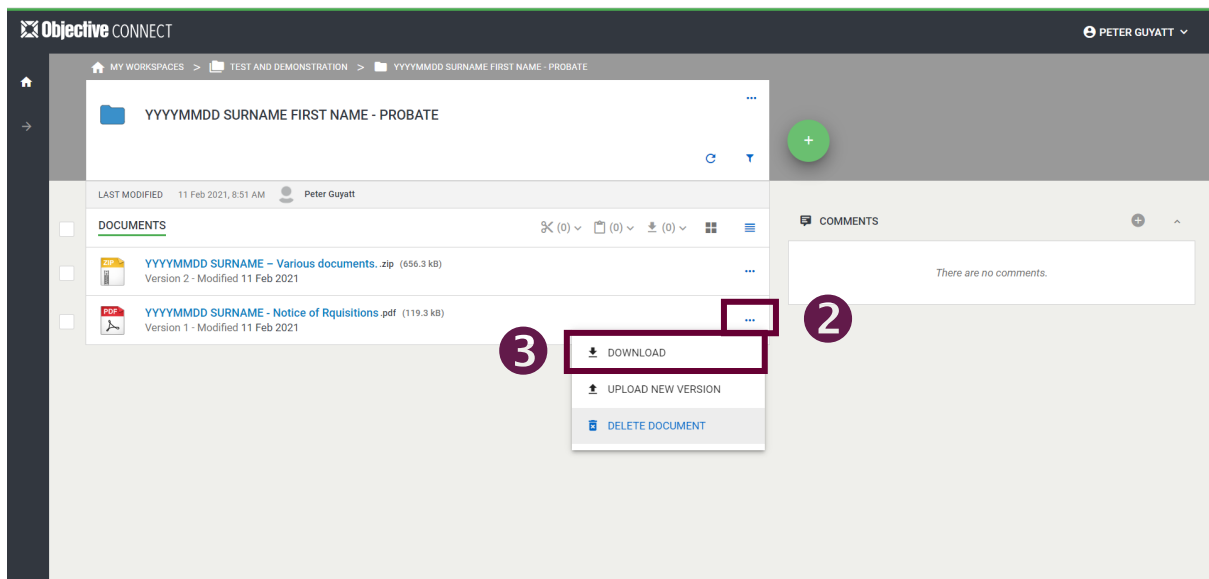
1. Locate the document you want to delete.

2. Use the '…' icon to display options for that document.

3. Click 'Delete document'.
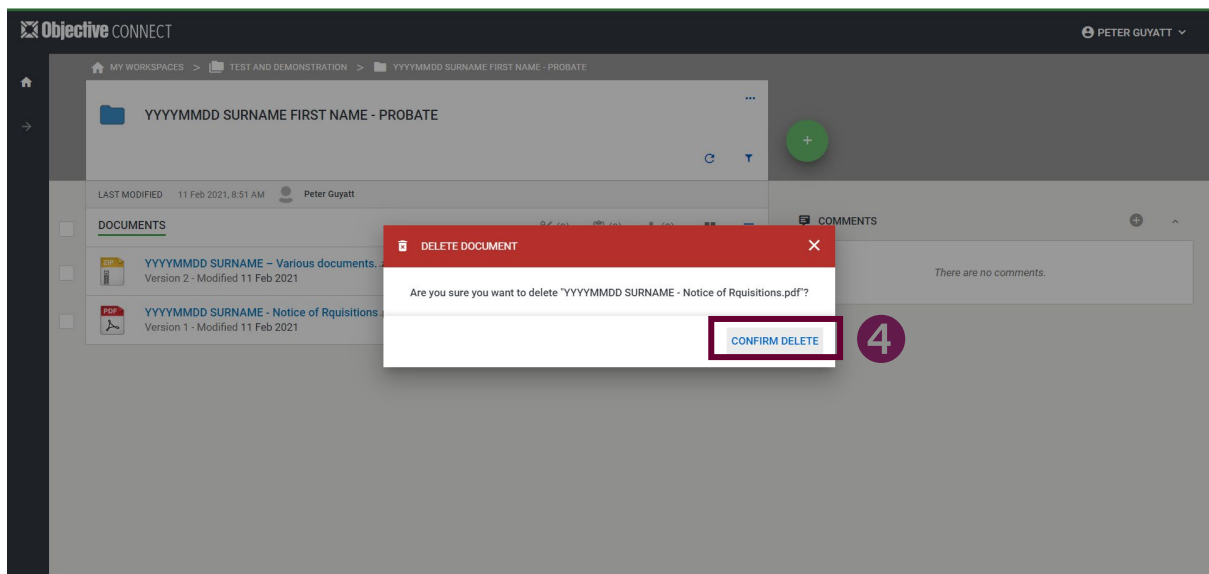
4. A confirmation will appear. Click 'Confirm delete'

5. Once confirmed, the document will be removed from the workspace. No users will be able to retrieve the document.

Add a comment

Comments are visible from the workspace dashboard as well as within each folder they relate to.
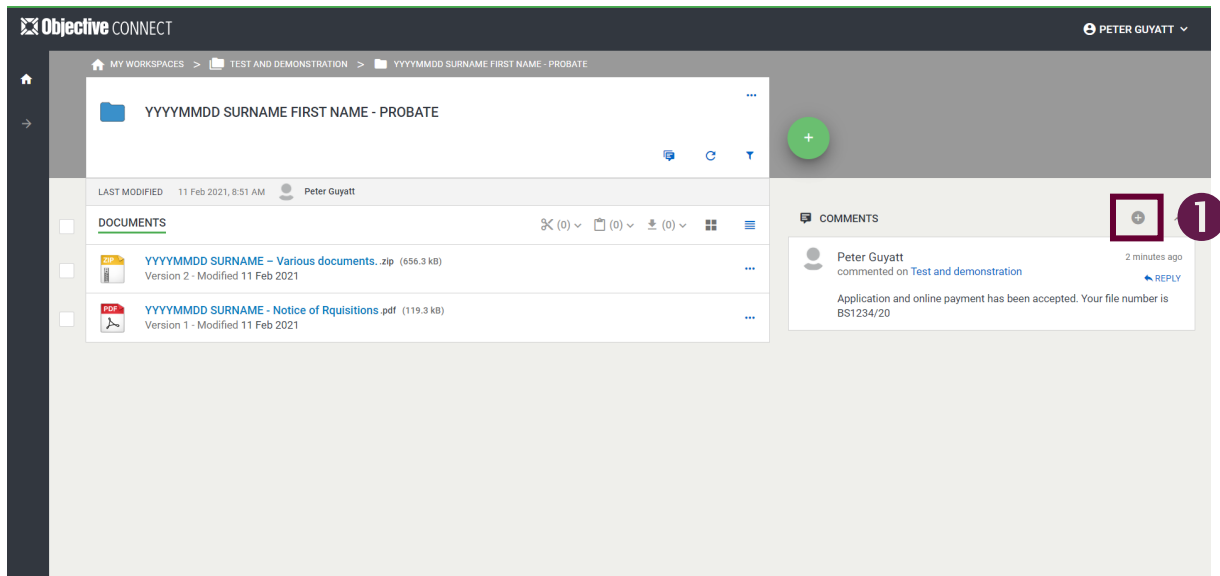
1. Within a folder, select the plus symbol next to comments.
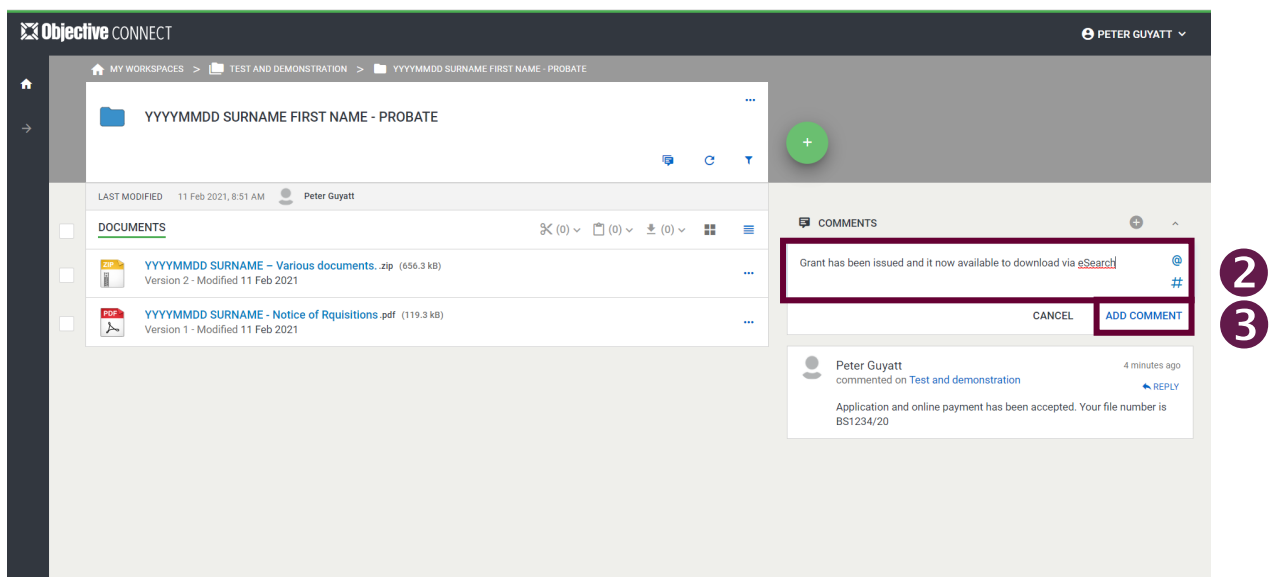
2. Write your comment.

Note:

- Use' @' to mention a participant and '#' to reference a particular document or folder.

3. Click 'Add comment' to confirm. Your comment will now be visible to participants within that workspace.

Frequently Asked Questions (FAQs)

1. What is Objective Connect? Do I have to use it?

   - Objective Connect is a secure file sharing platform used to support Probate Applications within the Supreme Court to determine appropriateness of Objective Connect for your matters, please refer to the Protocol. It is not mandatory to use Objective Connect, however is encouraged due to the current COVID-19 situation.

2. How do I request access to Objective Connect?

   - Request access to Objective Connect by emailing Wills.Estates@justice.qld.gov.au from your work email address.

3. Can this system be accessed by any member of the public?

   - No, the intention of Objective Connect is to provide law firms that submit a large number of probate applications to do so electronically.

4. Is there a limit on the number of users or documents I can submit?

   - There is an initial limit of two to three users per law firm at this stage. If additional users are required, please submit a request by emailing Wills.Estates@justice.qld.gov.au.

5. How do I resubmit a file?

   - Click on the three dots at the end of the file's name. Select 'Upload new version', then follow the steps outlined in the section Add a Document to a Folder.
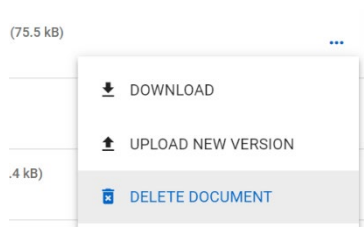
6. Are my documents secure?

   - Yes. Objective Connect is certified for global ISO9001 and ISO27001 standards, consistent with the Australian Cyber Security Centre (ACSC) Information Security Manual (ISM) and independently IRAP assessed for Sensitive and Protected data.

   - For recommended security setting in your browser, please read How to set the ideal security settings for my browse in the FAQ section in the Objective Connect Online help page.

7. How long will the documents remain on the Objective Connect platform?

   - Documents and work folders will be auto deleted after two months from the date of last use. However, due to the limited space allocated in Objective Connect, we ask you to delete the work folder and files contained therein after two weeks of the matter being completed.

8. Are there any plans to introduce electronic filing/lodging for other matter types?

- Based on the experience to date, the Registry is considering what other areas the Objective Connect application can be reasonably applied to.