



Deceased Estate Online (User Guide)

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1 ACCESS TO DECEASED ESTATE ONLINE

Once registered and logged in, click on “Masters of the High Court Services” in the left menu as shown in the figure below:



Figure 1: DOJ Online Homepage

On the dropdown menu, select “*Deceased Estate*” as shown below in the figure below. Figure 2



Figure 2: DOJ Online Homepage

To create a new Deceased Estate case, click on “[Register a New Death Notice/Application.](#)”



Figure 3: Deceased Estate Homepage

A popup will be displayed upon clicking on the [‘Register a New Death Notice/Application’](#) link, to confirm the profile on which you are transacting. This will display the Name of the Profile and Type of Profile as indicated below. Click on **‘Yes’** to continue, or **‘No’** to change your profile.

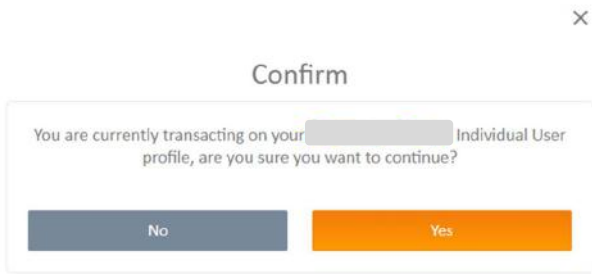


Figure 4: Profile Confirmation

If **‘No’** is selected, the system will redirect the user to the **‘My Profiles’** page, to switch to the correct profile the Deceased Estate case is the registered against as indicated below:

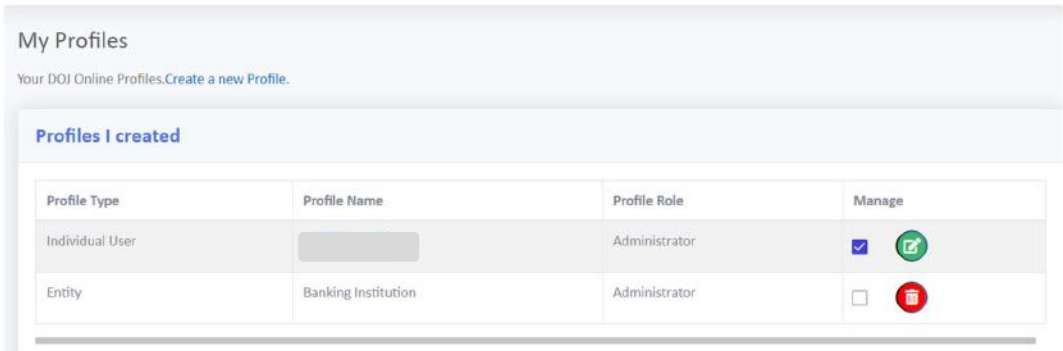


Figure 5: My Profiles

On the top right side of the screen, the profile name is displayed.

Note: An individual User can be linked to one (1) Entity and one (1) Service Provider only.

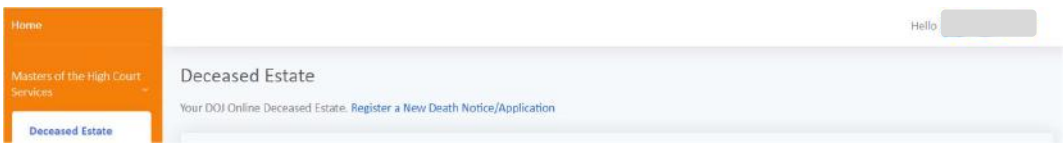


Figure 6: Profile Name Display

If **‘Yes’** is selected, a Deceased Estate Application Declaration popup is displayed, if the information is known answer **“Yes”** by sliding to the right and the slider. The slider will change to green to indicate your selection.

An indication of the required documentation is displayed as indicated in the figure below.

×

Deceased Estate Application Declaration

Do you have all the information required to lodge the Estate?

Do you have all required documents to complete the process?

Is executor nominated?

Please attach Deceased Death Certificate; Deceased ID/Passport Document; Applicant ID/Passport Document; Next of Kin ID/Passport documents(s); Deceased Marriage Certificate; Will/Testament.

Please download the below system generated documents, sign and upload them again -

J155 - Undertaking and Acceptance of Masters Directions; J190 - Acceptance of Trust as Executor; J 192 - Affidavit Particulars of Next of Kin must be commissioned and signed; J294 - Death Notice; Nomination of Masters Representatives / Executor; J243 - Inventory - Signed copy

Cancel

Clear

Accept

Figure 7: Deceased Estate Application Declaration

Once complete, click on **“Accept.”**

To clear the selection, click on **“Clear”** or to Cancel the application, click on **“Cancel.”**

If the answer to the declarations listed in Figure 7the figure below above is **“Yes”**, the slider will be green for all, then select **“Accept”** to move to the Deceased Details screenFigure 6.

If the answer to any of the declarations listed in the figure aboveFigure 7 is **“No”**, the slider remains greyed, and the figure below will be displayed:

×

Alert

Please note that an incomplete application will not be submitted for processing. This will cause delays. Please ensure all the mandatory information and documents are included to speed up the application process

Cancel

Continue

Figure 8: Alert Message Popup

To continue with the Deceased Estate application, click on **“Continue”** or to cancel the Deceased Estate application, click on **“Cancel.”**

Once the user clicks on **“Continue.”**

2 DECEASED DETAILS

To continue with the application, fill in the Deceased Details as displayed in Figure 9 below:

*Denotes required information (mandatory)

- Select Identity Type
 - If **RSA Identity Number** is selected, then populate RSA ID field.
- **Live status** will automatically default to “Deceased”.
- Select **Nationality**
- Capture **First Name (s)** (all names as it appears on your Identification Document)
- Capture **Surname** (all surnames as it appears on your Identification Document)
- Capture **Maiden Surname**
- Capture **Place of Birth**
- Select **Population Group**
- Capture **Occupation**
- Select **Date of Birth** (Date of Birth will auto populate from ID number captured)
- Select **Marital Status** (if Single – Marriage type and Place where Married will be greyed out)
- Select **Marriage Type**
- Capture **Place Where Married**
- Select **Date of Death**
- Select **Will Available**
 - If “Yes” is selected:
 - Click on ‘Add Will’ a popup will appear where:
 - Select Will Status Type.
 - Capture Number of Pages.
 - Capture Date will signed if available.

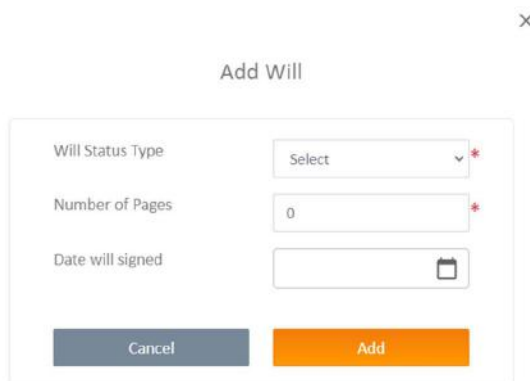


Figure 9: Add Will

- Click on ‘Add’ to add or ‘Cancel’ to cancel.
- Indicate ‘Is this a Joint/Massed Will?’
 - “Yes” or “No” for Is this a Joint Will Details?
 - If ‘Yes’ is selected, click on ‘Add Massed Party’

✕

Add Massed Party

First Name	<input type="text"/>	*
Surname	<input type="text"/>	*
Address Type	Residential Address	▼ *
Address Line 1	<input type="text"/>	*
Address Line 2	<input type="text"/>	
Province	Select Province	▼ *
City	Select City	▼ *
Postal Code	Postal code	*

Cancel
Add

Figure 10: Add Massed Party

- Select '**Add**' to add, and '**Cancel**' to cancel
- **Add Address**, and capture Address information – (one of each address type can be added)
 - Select **Address Type**.
 - Capture **Ordinary Residence Line 1**.
 - Capture **Ordinary Residence Line 2**.
 - Select **Province**.
 - Select **City**.
 - Select **Postal Code**.

✕

Add Address

Address Type	Residential Address	▼ *
Ordinary Residence Line 1	<input type="text"/>	*
Ordinary Residence Line 2	<input type="text"/>	
Province	Select Province	▼ *
City	Select City	▼ *
Postal Code	Select Postal Code	▼ *

Cancel
Add

Figure 11: Add Address

An alert popup will appear indicating the Masters Office the case will fall under based on your selected area as indicated in Figure 12 below

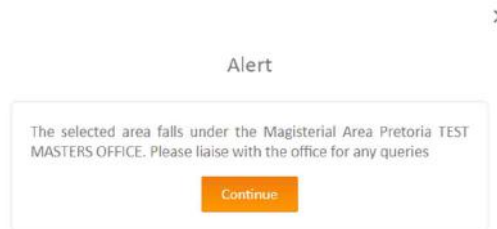


Figure 12: Masters Office Alert

- Select **Linked Master Office** (filtered based on Province and City Name)

Deceased Application

Deceased Details / Applicant Information / Next of Kin Details / Assets and Liabilities / Executor Information / Supporting Documents

Identity Type RSA Identity Number	Identity Number (13 Digits Number)
Live Status Select Live Status	Nationality South Africa
Full Name(s)	Surname
Maiden Surname	Place of Birth
Population Group Select Population Group	Occupation
Date Of Birth	Marital Status Select Marital Status
Marriage type Select Marriage type	Place Where Married
Date Of Death	Will Available: <input type="radio"/> Yes <input type="radio"/> No

Add Will

Will

Number Of Pages	Will Status	Date Of Will Signed	Manage
no records to display			

Is this a joint/Massed Will?

☒ Yes
☐ No

Add Massed Party

Massed Will

First Name	Surname	Address Type	Address Line 1	Address Line 2	Province Name	City Name	Postal Code	Manage
no records to display								

Add Address

Residential address must be 12 months prior to death


Addresses

Address Type	Ordinary Residence Line 1	Ordinary Residence Line 2	Province Name	City Name	Postal Code	Manage
no records to display						

Linked Master Office

PIETERMARITZBURG MASTERS OFFICE

Figure 13: Deceased Details Tab

To **Manage** the entries, the user can Delete or Edit by clicking  to Edit or  to Delete

- Click **Next** to move to the next tab and to auto save the captured information, the mandatory information must be completed to move to the next tab
- Click **Cancel** to cancel the application
- Click **Save** to save the application

3 APPLICANT INFORMATION

*Denotes required information (mandatory)

Most of the information will be prepopulated from the user registration, complete the following information:

- Select “Yes” or “No” for **Signatory present at death**.
- Select “Yes” or “No” for **Did Signatory identify deceased?**
- Select **Method of Notice** from the values provided.
- Select Signatory Relationship with deceased (Capacity)
 - If “Other” is selected, capture “Other” description field.
- Select **Method of Communication**
 - **Email** – for method of communication to be received via email.
 - **SMS** – for method of communication to be received via SMS.
- **Add Address** – the address on the user profile is displayed as a default address for Residential Address type. The user has the selection of adding postal, and work address. The Residential Address type is mandatory.
- Select “Yes” or “No” for **Is Executor?**

Note: If ‘Yes’ is selected, the system will pull all the applicant’s information through to the Executor Information page where the remaining Executor Information will need to be completed.

The screenshot shows the 'Deceased Application' form with the 'Applicant Information' tab selected. The form is divided into two columns. The left column contains fields for Identity Type (RSA Identity Number), Nationality (South Africa), Full Name(s), Contact Number, Did Signatory identify deceased (radio buttons for Yes/No), Signatory Relationship with deceased (Capacity) (Blood relative or connection to give this notice), and Method of Communication (Email). The right column contains Live Status (Alive), Identity Number (13 Digits Number), Surname, Signatory present at death (radio buttons for Yes/No), Method of Notice (Death Certificate), and Other. Red asterisks indicate mandatory fields.

Deceased Application	
Applicant Information	
Identity Type RSA Identity Number	Live Status Alive
Nationality South Africa	Identity Number (13 Digits Number)
Full Name(s)	Surname
Contact Number	Signatory present at death <input checked="" type="radio"/> Yes <input type="radio"/> No
Did Signatory identify deceased <input type="radio"/> Yes <input type="radio"/> No	Method of Notice Death Certificate
Signatory Relationship with deceased (Capacity) Blood relative or connection to give this notice	Other
Method of Communication Email	

Add Address

Residential address is mandatory

Addresses

Address Type	Address Line 1	Address Line 2	Province Name	City Name	Postal Code	Manage
Postal Address	30 San Jerez, Seaward Estate		KwaZulu-Natal	Doonside	4126	
Residential Address	3 Lions Head	Wild Farm Estate	Gauteng	Garsfontein	0081	

Is Executor?*

☒ Yes ☐ No

Cancel Previous Save Next

Figure 14: Applicant Information

To **Manage** the entries, the user can Delete or Edit by clicking to Edit or to Delete

- Click **Next** to move to the next tab and to auto save the captured information, the mandatory information must be completed to move to the next tab
- Click **Cancel** to cancel the application
- Click **Save** to save the application

4 NEXT OF KIN DETAILS

*Denotes required information (mandatory)

Note: On the Deceased Details screen, if a Will was selected as 'Yes', then Next of Kin details does not have to be captured.'

4.1 Deceased Spouse Details

To add the Deceased Spouse:

- Select Relation To Deceased(Spouse details)
- Add Deceased Spouse Details
 - Select Identity Type
 - If **RSA Identity Number** is selected, then populate RSA ID field
 - If **Old RSA Identity Number** is selected, then populate RSA ID field
 - If **Passport** is selected, then populate Passport Number field
 - Select **Nationality**
 - Capture **Passport Number**
 - Capture **First Names** (Capture First Name(s) as it appears on your Identification Document / Passport)
 - Capture **Surname** (Capture Surname(s) as it appears on your Identification Document / Passport)
 - Select **Life Status**
 - If **"Alive"** is selected – Date of Death, Place Estate Registered, Estate Number and Master Office Name is greyed out

- If **“Deceased”** is selected
 - Capture **Place Estate Registered**
 - Capture **Estate Number**
 - Capture **Master Office Name**
- **Add Address** information (add at least one address type)
- Select **“Yes”** or **“No”** for Select an option if you have been **Nominated as an Executor of the Estate**
- Select **“Add”** to add the Deceased Children
- Select **“Cancel”** to cancel the adding the Deceased Children

The information captured will be populated into the grid as displayed in Figure 8 below:

Figure 15: Deceased (Spouse details)

To **Manage** the entries, the user can Delete or Edit by clicking  to Edit or  to Delete

- Click **Next** to move to the next tab and to auto save the captured information, the mandatory information must be completed to move to the next tab
- Click **Cancel** to cancel the application
- Click **Save** to save the application

4.2 Deceased Children Details



To add the Deceased Children Details

- Select **Relation To Deceased(Deceased Children)**
- **Add Deceased Children Details**
 - Select **Identity Type**
 - If **RSA Identity Number** is selected, then populate RSA ID field.
 - If **Old RSA Identity Number** is selected, then populate RSA ID field.
 - If **Passport** is selected, then populate Passport Number field.
 - Select **Nationality**
 - Capture **Passport Number**
- Capture **First Names** (Capture First Name(s) as it appears on your Identification Document / Passport)
- Capture **Surname** (Capture Surname(s) as it appears on your Identification Document / Passport)
- Select **Life Status**
 - If **“Alive”** is selected – Date of Death, Place Estate Registered, Estate Number and Master Office Name is greyed out.
 - If **“Deceased”** is selected

- Capture **Place Estate Registered**
- Capture **Estate Number**
- Capture **Master Office Name**
- **Add Address** information (add at least one address type)
- Select **“Yes”** or **“No”** for Select an option if you have been **Nominated as an Executor of the Estate**
- Select **“Add”** to add the Deceased Children Details
- Select **“Cancel”** to cancel the adding the Deceased Children Details

The information captured will be populated into the grid as displayed in Figure below:

Figure 16: Deceased Children Details

To **Manage** the entries, the user can Delete or Edit by clicking  to Edit or  to Delete.

- Click **Next** to move to the next tab and to auto save the captured information, the mandatory information must be completed to move to the next tab.
- Click **Cancel** to cancel the application.
- Click **Save** to save the application.

4.3 Deceased Children Descendant Details

Note: At least 1 major and Deceased Child needs to be added before a Deceased Child Descendant can be added



To add the Deceased Children Descendant Details

- Select **Parent** from list provided.
- Select **Relationship to Parent** from list provided.
 - Select **Identity Type**
 - If **RSA Identity Number** is selected, then populate RSA ID field.
 - If **Old RSA Identity Number** is selected, then populate RSA ID field.
 - If **Passport** is selected, then populate Passport Number field.
 - Select **Nationality**
 - Capture **Passport Number**
 - Select **Person Status** from list provided.
 - Capture **First Names** (Capture First Name(s) as it appears on your Identification Document / Passport)
 - Capture **Surname** (Capture Surname(s) as it appears on your Identification Document / Passport)
 - Select **Life Status**
 - If **“Alive”** is selected – Date of Death, Place Estate Registered, Estate Number and Master Office Name is greyed out
 - If **“Deceased”** is selected

- Capture **Place Estate Registered**
- Capture **Estate Number**
- Capture **Master Office Name**
- **Add Address** information (add at least one address type)
- Select **“Yes”** or **“No”** for Select an option if you have been **Nominated as an Executor of the Estate**
- Select **“Add”** to add the Deceased Children Descendant Details
- Select **“Cancel”** to cancel the adding the Deceased Children Descendant Details

The information captured will be populated into the grid as displayed in Figure 16the Figure below:

Figure 17: Deceased Children Descendant Details

To **Manage** the entries, the user can Delete or Edit by clicking  to Edit or  to Delete.

- Click **Next** to move to the next tab and to auto save the captured information, the mandatory information must be completed to move to the next tab.
- Click **Cancel** to cancel the application.
- Click **Save** to save the application.

4.4 Deceased Spouse Children Details

To add the Deceased Children Details



- Select **Relation To Deceased(Spouse Children)**
- **Add Spouse Children Details**
 - Select **Identity Type**
 - If **RSA Identity Number** is selected, then populate RSA ID field.
 - If **Old RSA Identity Number** is selected, then populate RSA ID field.
 - If **Passport** is selected, then populate Passport Number field.
 - Select **Nationality**
 - Capture **Passport Number**
 - Capture **First Names** (Capture First Name(s) as it appears on your Identification Document / Passport)
 - Capture **Surname** (Capture Surname(s) as it appears on your Identification Document / Passport)
 - Select **Life Status**
 - If **“Alive”** is selected – Date of Death, Place Estate Registered, Estate Number and Master Office Name is greyed out.
 - If **“Deceased”** is selected

- Capture **Place Estate Registered**
- Capture **Estate Number**
- Capture **Master Office Name**
- **Add Address** information (add at least one address type)
- Select **“Yes”** or **“No”** for Select an option if you have been **Nominated as an Executor of the Estate**
- Select **“Add”** to add the Deceased Spouse Children Details
- Select **“Cancel”** to cancel the adding the Deceased Spouse Children Details

The information captured will be populated into the grid as displayed in Figure below:

Spouse Children Details			
Full Name(s)	Surname	Id/Passport Number	Manage
No records to display.			

Figure 18: Deceased Spouse Children Details

To **Manage** the entries, the user can Delete or Edit by clicking  to Edit or  to Delete.

- Click **Next** to move to the next tab and to auto save the captured information, the mandatory information must be completed to move to the next tab.
- Click **Cancel** to cancel the application.
- Click **Save** to save the application.

4.5 Deceased Parent Details


To add the Deceased Parent Details

- Select **Relation To Deceased(Parent Details)**
- **Add Parent Details**
 - Select **Identity Type**
 - If **RSA Identity Number** is selected, then populate RSA ID field.
 - If **Old RSA Identity Number** is selected, then populate RSA ID field.
 - If **Passport** is selected, then populate Passport Number field.
 - Select **Nationality**
 - Capture **Passport Number**
 - Capture **First Names** (Capture First Name(s) as it appears on your Identification Document / Passport)
 - Capture **Surname** (Capture Surname(s) as it appears on your Identification Document / Passport)
 - Select **Life Status**
 - If **“Alive”** is selected – Date of Death, Place Estate Registered, Estate Number and Master Office Name is greyed out.
 - If **“Deceased”** is selected
 - Capture **Place Estate Registered**

- Capture **Estate Number**
- Capture **Master Office Name**
- **Add Address** information (add at least one address type)
- Select “**Yes**” or “**No**” for Select an option if you have been **Nominated as an Executor of the Estate**
- Select “**Add**” to add the Deceased Parent Details
- Select “**Cancel**” to cancel the adding the Deceased Parent Details

The information captured will be populated into the grid as displayed in Figure 19 below:

Figure 19: Deceased Parent Details

To **Manage** the entries, the user can Delete or Edit by clicking  to Edit or  to Delete

- Click **Next** to move to the next tab and to auto save the captured information, the mandatory information must be completed to move to the next tab
- Click **Cancel** to cancel the application
- Click **Save** to save the application

4.6 Deceased Other Party

To add the Deceased Party Details

- Select **Relation To Deceased(Other Party Details)**
- **Add Deceased Other Party Details**
 - Select **Identity Type**
 - If **RSA Identity Number** is selected, then populate RSA ID field.
 - If **Old RSA Identity Number** is selected, then populate RSA ID field.
 - If **Passport** is selected, then populate Passport Number field.
 - Select **Nationality**
 - Capture **Passport Number**
 - Capture **First Names** (Capture First Name(s) as it appears on your Identification Document / Passport)
 - Capture **Surname** (Capture Surname(s) as it appears on your Identification Document / Passport)
 - Select Life Status
 - If “**Alive**” is selected – Date of Death, Place Estate Registered, Estate Number and Master Office Name is greyed out.
 - If “**Deceased**” is selected
 - Capture **Place Estate Registered**
 - Capture **Estate Number**
 - Capture **Master Office Name**

- **Add Address** information (add at least one address type)
- Select **"Yes"** or **"No"** for Select an option if you have been **Nominated as an Executor of the Estate**
- Select **"Add"** to add the Deceased Other Party Details
- Select **"Cancel"** to cancel the adding the Deceased Other Party Details

The information captured will be populated into the grid as displayed in the figure below:



Relation To Deceased (Other Party)
Select Next Of Kin

+ Add Other Party Details

Other Party Details

Full Name(s)	Surname	Id/Passport Number	Manage
No records to display.			

Figure 20: Deceased Other Party Details

To **Manage** the entries, the user can Delete or Edit by clicking  to Edit or  to Delete.

- Click **Next** to move to the next tab and to auto save the captured information, the mandatory information must be completed to move to the next tab.
- Click **Cancel** to cancel the application.
- Click **Save** to save the application.

Deceased Application

Deceased Details | Applicant Information | **Next of Kin Details** | Assets and Liabilities | Executor Information | Supporting Documents

Note: 'If there is a Will, then Next-of-Kin does not have to be captured.'

Relation To Deceased (Spouse details)
Select Next Of Kin

+ Add Spouse Details



Spouse Details

Full Name(s)	Surname	Id/Passport Number	Manage
No records to display.			

Relation To Deceased (Deceased Children)
Select Next Of Kin

+ Add Deceased Children Details

Deceased Children Details

Full Name(s)	Surname	Id/Passport Number	Manage
asdfasf	sdfasdf		 

+ Add Deceased Children Descendant Details

Deceased Children Descendant Details

Parent	Full Name(s)	Id/Passport Number	Manage
No records to display.			

Relation To Deceased (Spouse Children)

Select Next Of Kin

+ Add Spouse Children Details

Spouse Children Details

Full Name(s)	Surname	Id/Passport Number	Manage
No records to display.			

Relation To Deceased (Parent Details)

Select Next Of Kin

+ Add Parent Details

Parent Details

Full Name(s)	Surname	Id/Passport Number	Manage
No records to display.			

Relation To Deceased (Other Party)

Select Next Of Kin

+ Add Other Party Details

Other Party Details

Full Name(s)	Surname	Id/Passport Number	Manage
No records to display.			



Cancel

Previous

Save

Next

Figure 21: Next of Kin Details Tab

To **Manage** the entries, the user can Delete or Edit by clicking  to Edit or  to Delete.

- Click **Next** to move to the next tab and to auto save the captured information, the mandatory information must be completed to move to the next tab.
- Click **Cancel** to cancel the application.
- Click **Save** to save the application.

5 ASSETS AND LIABILITIES

To capture the application assets and liabilities

- Indicate with 'Is the Executor exempted from providing a security bond?'
 - If 'Yes' is selected - Capture date 'When were you exempted?'
 - If 'No' is selected - continue
- Capture **Estimated Estate Value**



Estimated Estate Value

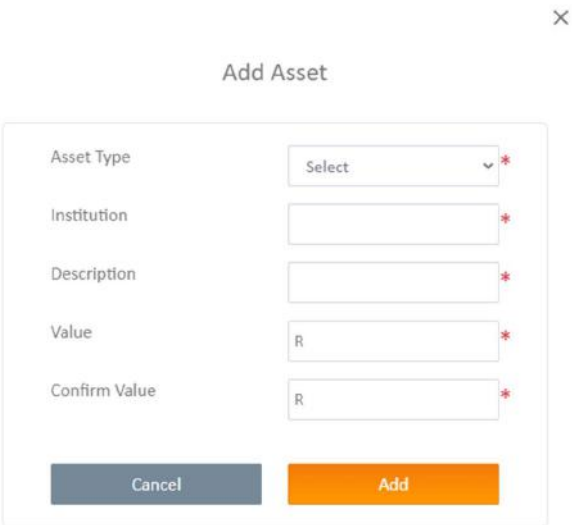
R 5000000 *

Figure 22: Estimated Estate Value

- **Add Asset** Information
 - Select **Asset Type**

Note: If Movable is selected, the Institution becomes mandatory

- Capture **Institution**.
- Capture **Description**.
- Capture **Value**.
- Confirm **Value**.
- Select **"Add"** to add Asset.
- Select **"Cancel"** to cancel adding Asset.



×

Add Asset

Asset Type	Select ▼ *
Institution	* *
Description	* *
Value	R * *
Confirm Value	R * *

Cancel Add

Figure 23: Add Asset

Note: If the added asset value does not correlate with the 'Estimated Estate Value' captured the following confirmation popup will appear

×

Confirm

Total assets value (Consolidated assets line items amount) is not equal to the Estimated estate value of (Estimated Estate Value Amount). Would you like the system to auto correct?

No
Yes

Figure 24: Confirmation to auto correct the Estimated Estate Value Amount

Click on **Yes** to continue and **No** to update the added Asset

The added Asset will be displayed in the grid as per below:

Add Asset

Asset				
Assets Type	Description	Institution	Value	Manage
Immovable	House		R 300000	✎ ✖

Figure 25: Added Asset Grid

- **Add Liability** Information
 - Capture **Institution**
 - Capture **Value**
 - Confirm **Value**
 - Select **"Add"** to add Liability.
 - Select **"Cancel"** to cancel adding Liability.

×

Add Liability

Institution

Value

R

*

Confirm-value

R

*

Cancel
Add

Figure 26: Add Liability

The added Liability will be displayed in the grid as per figureFigure 27 below:

[Add Liability](#)

Liability		
Institution	Value	Manage
Loan	R 40000	 

Figure 27: Added Liability Grid

The Assets and Liabilities tab is displayed in figureFigure 28 below:

Deceased Application

Deceased Details
Applicant Information
Next of Kin Details
Assets and Liabilities
Deceased Information
Supporting Documents

Estate Value Details

Estimated Estate Value:

R

[Add Asset](#)

Asset

Assets Type	Description	Institution	Value	Manage
No records to display				



[Add Liability](#)

Liability

Institution	Value	Manage
No records to display		

[Cancel](#)
[Previous](#)
[Save](#)
[Next](#)

Figure 28: Assets and Liabilities Tab

To **Manage** the entries, the user can Delete or Edit by clicking  to Edit or  to Delete.

- Click **Next** to move to the next tab and to auto save the captured information, the mandatory information must be completed to move to the next tab.
- Click **Cancel** to cancel the application.
- Click **Save** to save the application.

6 EXECUTOR INFORMATION

To capture the Executor Information

- Select “Yes” or “No” for Executor Details Available?
- Select “Yes” or “No” for Executor Ready for Appointment?
 - If “No” is selected – select Reason for not appointing.
 - If ‘Other’ is selected, capture reason description in Other field.
 - If “Yes” is selected – the following fields are greyed out.
 - Reason for not appointing.
 - Other.

Executor Appointment

Executor Details Available?
☒ Yes ☐ No

Reason for not appointing
Select Reason

Executor Ready for Appointment?
☐ Yes ☒ No

Other

Figure 29: Executor Appointment

Note: The system will auto populate appropriate Applicant information in the Executor Details if ‘Is Executor?’ on the Applicant Information screen was selected as ‘Yes’.

Is Executor?*

☒ Yes ☐ No

Figure 30: Is Executor?

Note: The auto populated information will appear in the grid as displayed in the figureFigure 31 below

+ Add Executor Details

Executor Details

Full Name(s)	Surname	Id/Passport Number	Is Primary Executor?	Manage
			Yes	

Figure 31: Executor Details

Note: There will be additional information that is required to be completed under Executor Details, this information is displayed in Figure 40the figure below

- Click on to **Edit** the auto populated Applicant information of click on to **Delete**. Complete the information under Executor Application Category Details
- Select **Application Category**
- Select “Yes” or “No” for ‘Is Signatory to Death Notice also the Executor?’
- Select “Yes” or “No” for ‘Is the Executor exempted from providing a security bond?’
 - If **Yes** was selected
 - Select date **When were you exempted?**
 - Capture **Security Amount**

Executor Application Category Details

Application Category: Nominee Of (Organization or Trust Company)

Is Signatory to Death Notice also the Executor? ☐ Yes ☐ No

Is the Executor exempted from providing a security bond? ☐ Yes ☐ No

Is the Executor exempted is required

Figure 32: Executor Application Category Details

- Complete the information under Executor Details as displayed in the figure below.
- Capture **Master Box Number**
- Select **Method of Communication**
- Select **Organization Name**
- Capture **Organization Number**

Executor Details

Identity Type: RSA Identity Number Identity Number (13 Digits Number):

Full Name(s): Surname:

Master Box Number: Method of Communication:

Organization Name: Select Organisation Organization Number:

Organisation name is required

Figure 33: Executor Details

- Select “Yes” or “No” for ‘Is Executor Renouncing?’
 - If “Yes” – add ‘Correspondent Summary Details’ information.

Add Correspondent Details

Correspondence Summary Details

Please add at least 1 correspondent details

Full Name(s)	Surname	Id/Passport Number	Manage
No records to display.			

Figure 34: Correspondent Details

- Select **Add Correspondent Details**
- A confirmation popup will appear.
 - Select ‘Yes’ to continue.
 - Select ‘No’ to cancel.

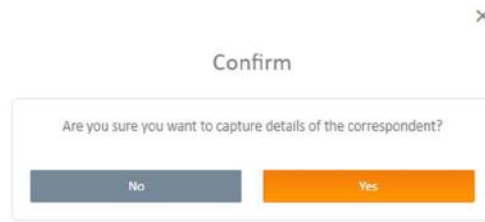


Figure 35: Confirmation Popup to Capture Details of Correspondent

- If “No” – add Correspondent Details will not appear.
 - Select **Identity Type**
 - If **RSA Identity Number** is selected, then populate RSA ID field.
 - If **Passport** is selected, then populate Passport Number field.
 - Capture **Full Name(s)** (Capture First Name(s) as it appears on your Identification Document / Passport)
 - Capture **Surname** (Capture Surname(s) as it appears on your Identification Document / Passport)
 - Capture **Master Box Number**
 - Capture **Email Address**
 - Capture **Contact Number**
 - Select **Method of Communication**
 - Select **Address Type**
 - Capture **Address Line 1**
 - Capture **Address Line 2**
 - Select **Province**
 - Select **City**
 - Capture **Postal Code**
 - Select tick box for ‘**Is the Domicilium address same as the correspondence address?**’
 - If tick box is checked, the system will auto populate the information.
 - If tick box is not checked
 - Select **Address Type**
 - Capture **Address Line 1**
 - Capture **Address Line 2**
 - Select **Province**
 - Select **City**
 - Capture **Postal Code**

Add Renunciation Details

Identity Type

Select Identification Type

Identity Number (13 Digits Number)

Full Name(s)

Surname

Master Box Number

Email Address

Contact Number

Method of Communication

Select

Address Type

Select

Address Line 1

Address Line 2

Province

Select Province

City

Select City

Postal Code

Postal code

Is the Domicilium address same as the correspondence address?

☐

Address Type

Domicilium

Address Line 1

Address Line 2

Province

Select Province

City

Select City

Postal Code

Postal code

Cancel

Add

Figure 36: Add Renunciation Details

- Select “Yes” or “No” for ‘Is Primary Executor?’
- Select “Yes” or “No” for ‘Is Applicant represented by an Agent?’

Add Agent Details

Agent Summary Details

Full Name(s)	Surname	Id/Passport Number	Manage
No records to display.			

Figure 37: Add Agent Details

- Click on ‘Add Agent Details’
 - Select **Organization Name**
 - Capture **Organization Name**
 - Select **Identity Type**

- If **RSA Identity Number** is selected, then populate RSA ID field.
- If **Passport** is selected, then populate Passport Number field.

- Capture **Full Name(s)** (Capture First Name(s) as it appears on your Identification Document / Passport)
- Capture **Surname** (Capture Surname(s) as it appears on your Identification Document / Passport)
- Capture **Master Box Number**
- Capture **Email Address**
- Capture **Contact Number**
- Select **Method of Communication**
- Select **Address Type**
- Capture **Address Line 1**
- Capture **Address Line 2**
- Select **Province**
- Select **City**
- Capture **Postal Code**
- Select tick box for 'Is the Domicilium address same as the correspondence address?'

- If tick box is checked, the system will auto populate the information.
- If tick box is not checked

- Select **Address Type**
- Capture **Address Line 1**
- Capture **Address Line 2**
- Select **Province**
- Select **City**
- Capture **Postal Code**

×

Add Agent Details

Organization Name <input type="text" value="Select Organisation"/> *	Organization Number <input type="text"/>
Identity Type <input type="text" value="Select Identification Type"/> *	Identity Number (13 Digits Number) <input type="text"/> *
Full Name(s) <input type="text"/> *	Surname <input type="text"/> *
Master Box Number <input type="text"/>	Email Address <input type="text"/>
Contact Number <input type="text"/>	Method of Communication <input type="text" value="Select"/> *

Address Type

Postal Address

Address Line 1

Address Line 2

City

Select City

Is the Domicilium address same as the correspondence address?

Address Type

Domicilium

Address Line 1

Address Line 2

City

Select City

Province

Select Province

Postal Code

Postal code

Province

Select Province

Postal Code

Postal code

Cancel

Add

Figure 38: Add Agent Details

- Click on 'Add' to add and 'Cancel' to cancel.

Note: The Agent Details will be populated as displayed in the Agent Summary Details grid below.

Add Agent Details

Agent Summary Details			
Full Name(s)	Surname	Id/Passport Number	Manage
			 

Figure 39: Add Agent Summary Details

Identity Type

RSA Identity Number

Identity Number (13 Digits Number)

7011040466088

Full Name(s)

Belinda

Surname

Kroukamp

Mobile Number

Communication

Email

Organization Name

HUTTON & COOK ATTORNEYS

Organization Number

Is executor Renouncing?

☐ Yes
☒ No

Is Primary Executor?



☒ Yes
☐ No

Is applicant represented by an agent?

☒ Yes
☐ No





Add Contact

Contacts

Contact Type	Value	Manage
Telephone Number (H)		 

Add Address

Addresses

Address Type	Address Line 1	Address Line 2	Province Name	City Name	Postal Code	Manage
Postal Address			Kwazulu Natal	Amanzimtoti	4126	 
Residential Address			Gauteng	Pretoria	0081	 

Correspondence Summary Details

Full Name(s)	Surname	Id/Passport Number	Manage
No records to display.			



Agent Summary Details

Full Name(s)	Surname	Id/Passport Number	Manage
No records to display.			

Cancel
Update

Figure 40: Executor Details

Note: More than one Executors can be added, however there is only one Primary Executor.

To **Manage** the entries, the user can Delete or Edit by clicking  to Edit or  to Delete.

- Click **Next** to move to the next tab and to auto save the captured information, the mandatory information must be completed to move to the next tab.
- Click **Cancel** to cancel the application.
- Click **Save** to save the application.

7 SUPPORTING DOCUMENTS

Note: As soon as Next is selected from Executor Information tab, an Alert Message will popup indicating the required documentation that is to be added based on the case information captured e.g.,

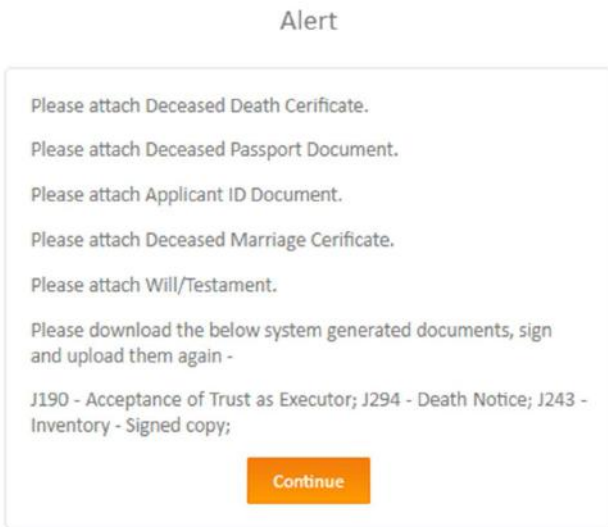


Figure 41: Alert Message – Required Documents


- The following **Structured Documents** will be available to download that will be auto populated based on the case information that has been captured:
 - J155 Signed copy – Undertaking and Accepting of Masters’ Directors (*Note: Once the user clicks on the download icon, the J155 structured form will be downloaded for each of the Executors that have been added. If there are no Executors added, the Applicant’s information will be prepopulated on the form, this form is to be printed, signed, and uploaded for each of the Executors added*)
 - J192 Affidavit Particulars of Next of Kin (*Note: This document is to be downloaded, printed, commissioned, and uploaded as an added document*)
 - J294 Death Notice
 - J190 Signed copy – Acceptance of Trust as Executor
 - J243 Inventory – Signed copy
 - Nomination Form – Nomination of Masters’ Representatives / Executor

Structured Documents	
Original Will document must be physically lodged with the Master Office	
Document Type	Manage
J155 - UNDERTAKING AND ACCEPTANCE OF MASTER'S DIRECTIONS BY EXECUTOR/EXECUTRIX	
J190 - ACCEPTANCE OF TRUST AS EXECUTOR	
J294 - DEATH NOTICE	
J243 - INVENTORY	
J192 - NEXT OF KIN AFFIDAVIT	
<div><div>< <</div><div>1 2</div><div>> ></div></div>	

Figure 42: Structured Documents

Note: As indicated on the figure above, the Original Will document must be physically lodged with the Master Office

To add supporting documentation

- Click on **Add Document**
 - Click on **“Choose Files”** – browse for your saved document(s) as displayed in the figure below. Multiple documents can be selected at one time, and select the relevant **Document Types**
 - Once documents are uploaded, they will be displayed as shown in the figure below.
 - Select the **‘Document Type’** to correctly classify the document added corresponding to the File Name
 - Select **‘Relationship to Deceased’** for the ‘Next of Kin’ identification type documents.
 - Click on  to delete if a file was added in error!
 - Select **“Add”** to add the chosen document(s)
 - Select **“Cancel”** to cancel adding the chosen document(s)

Add Documents

Next of kin - spouse son ID.pdf





















File Name	Document Type *	Relationship To Deceased *	Manage
Applicant ID.pdf	Applicant Id	Select	
Death Certificate.pdf	Death Certificate	Select	
Deceased ID.pdf	Deceased Id	Select	
J243 - Inventory - Signed copy	J243 - Inventory - Signed copy	Select	
Next of kin - spouse son ID.pdf	Next of Kin Id	Spouse Children-Son	

Figure 43: Add Documents

- After clicking on **“Add”**, the documents are displayed in the figure below.
- Select **“Cancel”** to cancel adding the chosen documents.

Add Document

Supporting Documents

Document Type	File Name	Relationship To Deceased	Status	Manage
Applicant Id	Applicant ID.pdf		Pending Review	  
Death Certificate	Death Certificate.pdf		Pending Review	  
Deceased Id	Deceased ID.pdf		Pending Review	  
J243 - Inventory - Signed copy	J243 - Inventory - Signed copy (1).pdf		Pending Review	  
Next of Kin Id	Next of kin - spouse son ID.pdf	Deceased Children-Son	Pending Review	  







1 2



Figure 44: Supporting Documents after Documents added

- Continue until all the required documentation has been added.
- Click on **Submit Later** to save and submit at a later stage.
- Click on **Previous** to go back to the previous screen.
- Click on **Cancel** to cancel the application.
- Click on **Submit** to continue with the application.

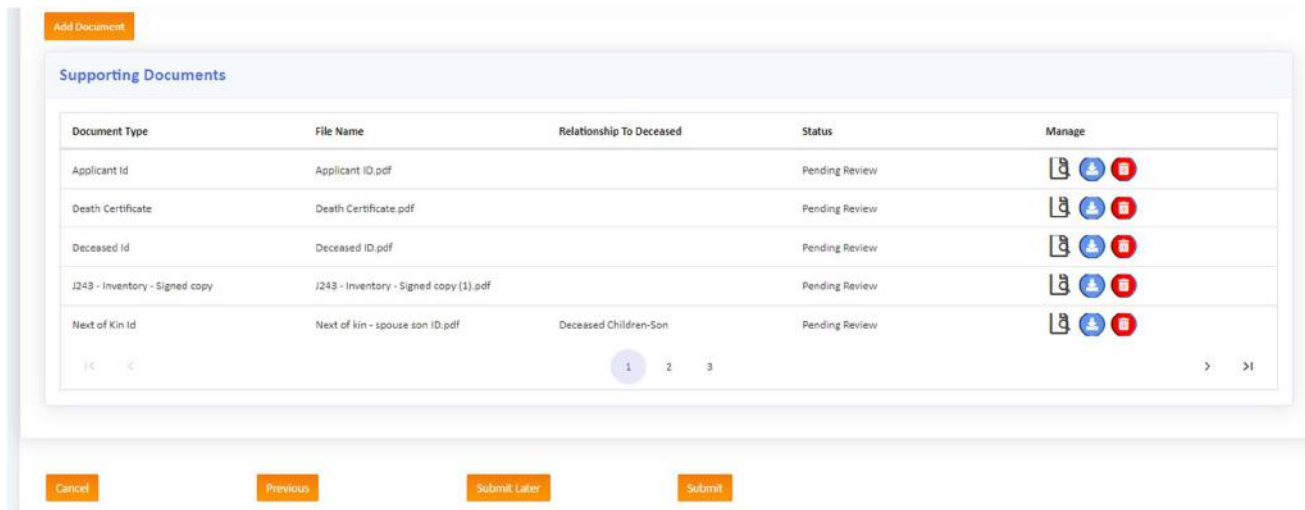


Figure 45: Supporting Documents

- A disclaimer will popup where the user is prompted to either “Accept” or “Decline”

Disclaimer :

Privileged/confidential information may be contained in the documentation. The sender/disclosing party of the documentation hereby confirms that he/she is authorized to attend to and deal with this matter and verifies the authenticity of the sent/scanned documentation. The sender/disclosing party further confirms that the sent/scanned documentation is a true version of the original, to be lodged with the Master of the High Court. In the event that the originals do not conform with the sent/scanned documentation, the Master of the High Court will not be held liable in any way whatsoever as a result of the misrepresentation and no Letter of Appointment will be issued. In the event the Master has already issued the Letter of Authority under OR is a result of the abovementioned circumstances, the Master reserves the sole right to cancel and recall the issued letters with immediate effect.

Figure 46: Disclaimer Popup

- To continue select **Accept** to acknowledge disclaimer and continue with application.
- To cancel select **Decline** if user does not acknowledge disclaimer and cannot continue with application.
- A Confirmation popup will appear.
 - Select **No** if user does not wish to submit the application, and user will be taken back to Supporting Documents tab
 - Select **Yes** to continue with application.

Confirm

Are you sure you want to submit the application?

Figure 47: Confirmation Popup

- Upon clicking on ‘Yes’, the application will be submitted, and redirected to the My Applications Page with the case displayed in the grid with the Unique Reference Number (URN) for further referencing relating to the case.

Figure 48: My Applications Page

The following Application Statuses are described below:

Awaiting DHA Validation – DHA link is down, as soon as the link is up, the system will automatically verify the Deceased Identification number, Full Names and Surname.

- If the validation passes, the status will change to Pending Document Review
- If the validation fails, the status will change to Incomplete, and the user will receive a notification requesting the user to review and resubmit.

Pending Document Review – the online documents and case information are in the process of being sent to the Masters Office.

Screen Application – the case will be verified by Court Officials and if anything requires additional information, they will request a 'Rework'. The user will be notified via their preferred method of communication with the reason for Rework.

Rework Requested – once the status has changed to 'Rework Requested' the user will receive a notification via their preferred method of communication with the reason for Rework, once the user logs into the portal, the My Application Page will appear.

Case Registered – case has been registered and assigned to a court official for further processing.















Deceased Estate				
Your DOJ Online Deceased Estate. Register a New Death Notice/Application				
Registered Applications				
Deceased Name	Creation Date	Application Status	URN	Manage
Gauteng Gauteng	Jan 17 2022 4:53PM	Incomplete		 
Mpumalanga Mpumalanga	Dec 23 2021 3:08PM	Documents Failed Review	0002021EST000003	 
Gauteng Gauteng	Dec 23 2021 1:17PM	Screen Application	0002021EST000002	
Limpopo Limpopo	Dec 22 2021 9:30AM	Incomplete		 
Eastern Cape Eastern Cape	Dec 21 2021 11:25AM	Incomplete		 
MAKWENA STEPHEN MATLOU	Dec 21 2021 11:05AM	Incomplete		 
Gauteng Bhargav	Dec 21 2021 11:01AM	Incomplete		 
Gauteng Gauteng	Dec 14 2021 3:21PM	Rework Requested	0002021EST000001	

Figure 49: My Applications Page – Rework Requested

- Click on the Edit icon showing for Rework Requested case, the user will get a popup showing the reason for Rework Requested as shown in the figure below.
- Click '**Continue**' on the popup, the user will be directed to the page where rework is requested.

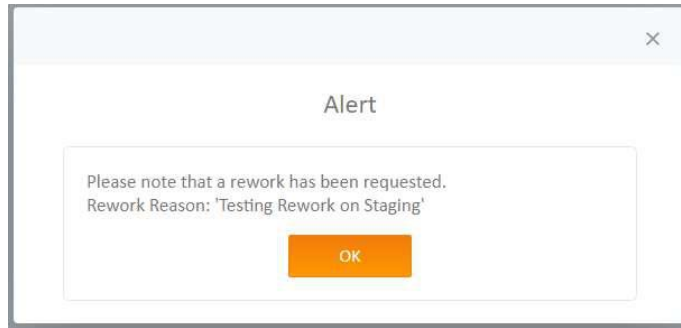


Figure 50: Reason for Rework Requested

Update the required requested rework and navigate by clicking on Next if you are not on the Supporting Documents tab. If there are any documents that was required:

- Continue until all the required documentation has been added.
- Click on **Submit Later** to save and submit at a later stage.
- Click on **Previous** to go back to the previous screen.
- Click on **Cancel** to cancel the application.
- Click on **Submit** to continue with the application, whereby the previous steps from Submit will be the same.
- Once the Court Official has passed the Screen Application stage, the user will be notified via their preferred method of communication on the status of the case until it reaches **Case Registered** status.




Deceased Estate				
Your DOJ Online Deceased Estate. Register a New Death Notice/Application				
Registered Applications				
Deceased Name	Creation Date	Application Status	URN	Manage
Gauteng Gauteng	Jan 17 2022 4:53PM	Incomplete		? ?
Mpumalanga Mpumalanga	Dec 23 2021 3:08PM	Documents Failed Review	0002021EST000008	? ?
Gauteng Gauteng	Dec 23 2021 1:17PM	Screen Application	0002021EST000002	?
Limpopo Limpopo	Dec 22 2021 9:30AM	Incomplete		? ?
Eastern Cape Eastern Cape	Dec 21 2021 11:25AM	Incomplete		? ?
MAKWENA STEPHEN MATLOU	Dec 21 2021 11:05AM	Incomplete		? ?
Gauteng Bhargav	Dec 21 2021 11:01AM	Incomplete		? ?
Gauteng Gauteng	Dec 14 2021 3:21PM	Rework Requested	0002021EST000001	?

Figure 51: My Applications Page

8 MANAGE ICONS



Figure 52: Manage Icons Tab

- a. Edit Icon: 
 - The Edit icon is used to view or edit the case details.
- b. Delete Icon: 
 - The delete icon is used to delete the case
- c. Audit Trail Icon: 
 - The Audit Trail icon is used to view the audit history of the case. The user should click on the Back button on the top right corner of the page to go back to the Deceased Estate list page

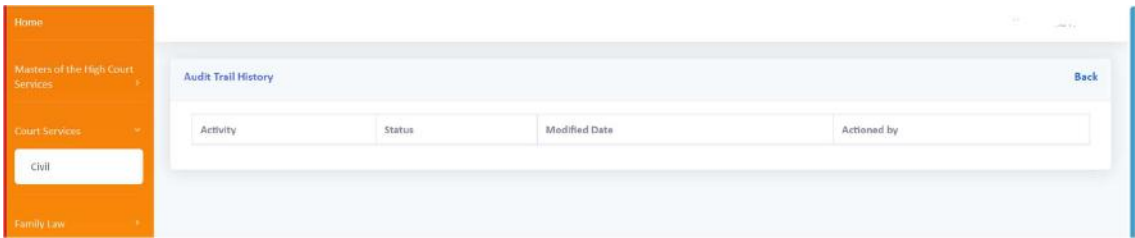



Figure 53: Audit Trail History Tab

- d. View Case Documents Icon: 

The View Case Documents icon will redirect the user to the Documents tab of the case where all the case documents can be viewed when the case is in Case Registered Status.

9 CASE INVITATIONS

On cases that are created by either a Service Provider or Entity profile, the cases will have an icon to invite another case member on a case level.

Click on the icon

Case worker – able to view (case information and status tracking) and edit cases in an Incomplete and Rework Requested status

Invited Member – only view case information and status tracking

Once the user has been invited, an invitation email with the case information and acceptance request is sent to the invitee.