



Information Certificates – Australian Capital Territory

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INTRODUCTION

An information certificate is a legal document that discloses specified information about a lot. Usually it is requested by solicitors and conveyancers on behalf of a prospective purchaser when a lot is being sold.

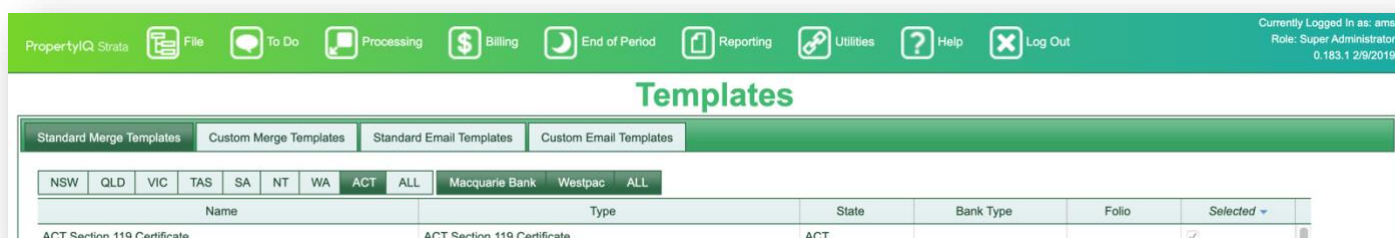
As these documents have different titles, depending on what State or Territory they are in, PropertyIQ uses the name information certificates across all States.

The information certificate in the ACT is a section 119 unit titles certificate.

You can generate information certificates singly from a lot owner's card or you can generate information certificates in bulk from a building card.


INFORMATION CERTIFICATE TEMPLATE

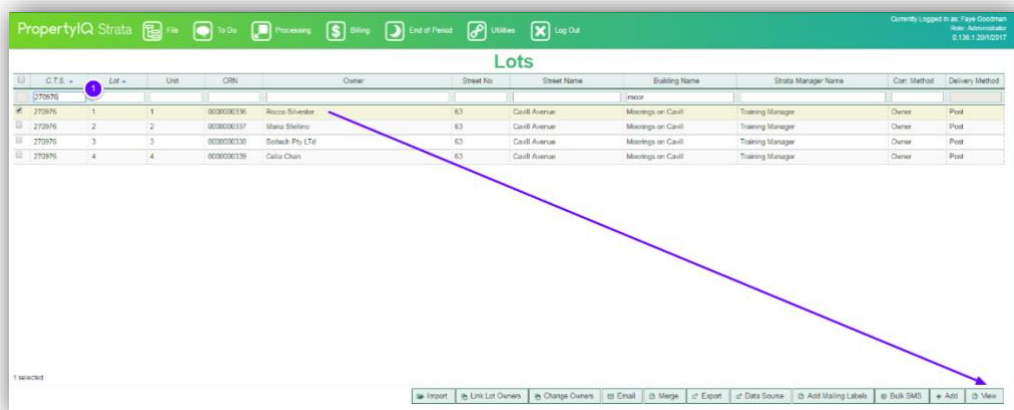
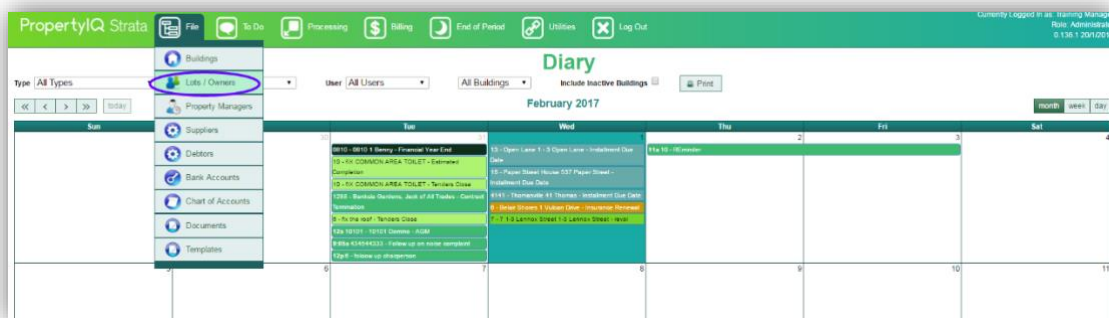
Before generating information certificates, you should ensure the standard merge templates are configured for your company. For full details about templates, see the manual "Templates"



GENERATING AN INDIVIDUAL INFORMATION CERTIFICATE

You can generate an information certificate from the lot owner card.

Go to  and select lots/owners.



1. Enter some key letters to find the lot you are looking for
2. Highlight the lot owner. View (or double click on the lot owner) to open the lot card

Lot/Owner

S/Plan* 123456 Lowanna Muse 57-61 Lowanna Street

Lot* 1 Unit 1 Street No 15

Street Name* Burns Court

Suburb* BRADDON

Accessory Unit

UOE* 100

CRN 0000000025

Owner Info
 NOTE: This lot owner is linked to 1 other owners
 Owner Name* Chris Burns
 (Ah) Email christinaburns@hotmail.com.au
 (Bh) Salutation
 Mobile 0422 323 422 Contact Name
 Fax Paid to 29/08/2019 Last Settled
 Committee Member: Y Committee Member Status: Active

Change Owner
Unlink Owner

Debt Collection
 Stage Legal Exclude from Debt Collection ?
 Notes
 Building Debt Collection: Y Repayment Plan: N Legal Action: N
 Issued by: ams on 25/07/2019 - 8:49 am - Email

Contact Info Delivery Settings Ledger Notes Documents Alerts SMS Emails Log of Changes

Owner Address Legal Residence Address
 Joint Owner Power of Attorney
 Tenancy Details

Lot Owner Page Email Info Certificate Last Info Certificate Edit Done

Select *Info Certificate* to start the info certificate generation.

1. Today's date is the default, but you can use the calendar to update or overtype with a different date
2. Select which register reports you want to print. Selected register reports will be generated as a PDF and attached to the information certificate.
3. The details of levies for this lot show here. You can click on the cross to remove a line item. Note: this does not delete the levy, it just removes the detail from the information certificate
4. *Generate*. This opens the info certificate template for editing

Information Certificate Generation

Selected Lot Info
 Lot: 2 Building: Banksia Gardens State: ACT

Certificate Date: 1 02/09/2019

Include Register Reports: 2

☒ Assets Register
☒ Authorisations Affecting Lots
☒ Common Authorisations
☒ Compliance Register
☒ Contracts Register
☐ Exclusive Use Allocations
☐ Funding Proposals
☒ Lot Authorisations
☒ Unregistered By-Laws

Levies

Levy Period	Due Date	Admin	Sinking	
(25/12/2017 - 24/3/2018)	25/12/2017	\$277.80	\$111.10	3 ✕

4

Generate Close

GENERATING BULK INFORMATION CERTIFICATES

You can create information certificates in bulk from the building card. To get started, click *Info Certificates* from a building card.

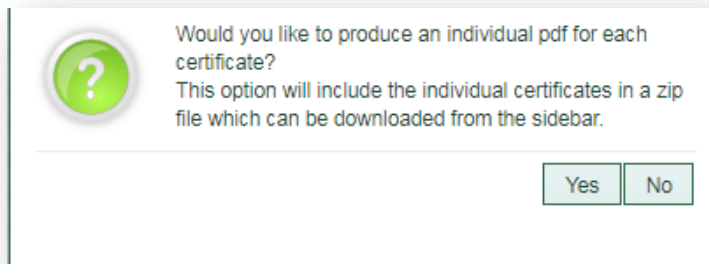
The screenshot shows the 'Building' card interface. The top section contains fields for 'U/Plan*', 'Manager*', 'Folio*', 'Building Type*', 'Building Sub Type*', 'Building Class', 'Total UOE*', 'Active', 'Debt Collection', 'All Inclusive Fees', and 'Payment Plan'. The 'Address' section includes 'Street No', 'Street Name*', 'Address 2', 'Suburb', 'Building Name', 'Block', 'Section', 'State*', and 'P/Code'. Below these fields is a tabbed interface with tabs for 'Settings', 'Dates', 'Charges', 'Info', 'Financials', 'Budget', 'Notes', 'Documents', 'Registers', 'Alerts', 'Work Orders', 'Insurance Claims', 'Emails', and 'Log of Changes'. The 'Info' tab is selected, showing a list of categories: 'Bank Account', 'Tax Settings', 'Original Proprietor', 'Auditor', 'Owner Interest', 'Levy Discount', 'Parking', 'Onsite Manager', and 'Caretaker'. At the bottom, there are buttons for 'Opening Balances', 'Info Certificates' (highlighted with a blue box), 'Schedules', 'Financial Reports', 'Edit', and 'Done'.

1. The certificate date defaults to today's date, but you can click on the date to open the calendar and alter the date.
2. The default is to produce a consolidated certificate. If the building has more than one contribution schedule, you can select a single schedule from the dropdown list
3. You can click in boxes to select lots individually or click in the box on the top line to select all
4. *Preview* creates a preview in the job centre on the right of your screen
5. *Generate and Save* when you are ready. You will have the option to produce an individual PDF for each certificate. This will create a zip file from which you can print each certificate individually or you can generate a Bulk PDF.
6. *Save* to save a draft that you can edit later

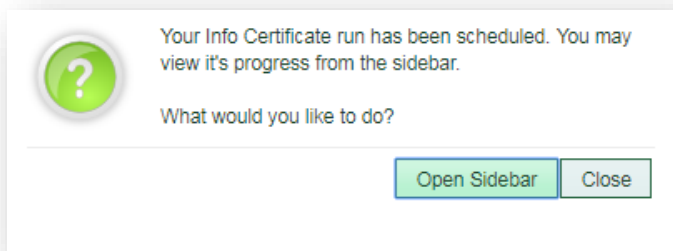
The screenshot shows the 'Bulk Information Certificate Generation' window. The 'Selected Building Info' section displays 'Building: 1288 Banksia Gardens 59 Albert Crescent' and 'State: ACT'. The 'Certificate Date' is set to '09/09/2019' and the 'Schedule' is 'Consolidated'. Below this is a table titled 'Lots Information' with columns for 'Lot', 'Unit', and 'Owner'. The table contains four rows of data, each with a checkbox in the first column. At the bottom, there are buttons for 'Preview', 'Generate', 'Save', and 'Close'.

Lot	Unit	Owner
1	1	Anna Liu
2	22	Ben Carpenter
3	3	Anna Liu
4	4	Burton Investments Propriety Limited Incorporated

When you select *Generate*, you will see the following popup:



A task is created in the job centre on the right of your screen



The completed info certificate document is saved in the documents tab of each lot owner card certificates were produced for.