Dignity Estate Fraud Protection: General Information and Tips

The website address is: www.ProgressiveEstateSolutions.com

From here you will be prompted for your login information, and will enter a secure website. If you work at several locations you require a different login for each location – this ensures that the correct information is populated on the printed forms, and is also used for billing.

1. Login using your username/password combination
2. Input Deceased and Executor Information
3. Print desired documents

Adding a shortcut to your desktop:

To save time you may want to add a shortcut to your desktop. This will allow you to click on the icon and go directly to the website. To add the shortcut, do the following:

1. Launch your web browser (Microsoft Internet Explorer is assumed in this manual)
2. In the address bar enter the website address www.ProgressiveEstateSolutions.com
3. Go to the top left corner of the browser and select 'File' from the menu
4. This will display several options, when you place your cursor over 'Send' it will display additional options including 'shortcut to desktop' – the shortcut will be added to your desktop.

Entering Information on the website:

Deceased and Executor information must be entered on the website before documents are faxed to us.

You will find that entering information on the website is quick and straight-forward. The required information has already been gathered during the meeting with the family.

Some features of the data entry page:

❑ Hover tips: when entering client information, if you hover over a field (as opposed to clicking), there will be an explanation
❑ Default values: some fields have a default value to make data entry quicker – a different value can easily be entered – these fields have a hover tip explaining the default
❑ Date calculation: the system will check that the Birth Date, Date of Death and Age correlate.
❑ SIN calculation: the system will check that the number provided is a possible SIN pattern. If the system will not accept the SIN you have, please enter 111111111 (nine 1's) and if possible, contact the family to verify the SIN. You can modify the record with the correct SIN later.

Printing Documents
The website allows you to print pre-populated Aftercare Documents and the pre-populated Client Authorization Form (if you are not using the blank version).

Available documents:
> Blank Client Authorization Form
> Pre-populated Client Authorization Form + Fax Cover Sheet
> HRDC ISP Notification of Death
> GST/CRA Notification Form
> CPP Death Benefit Application
> CPP Survivor Benefit Application
> Proof of Death Certificates
> Basic Client Letters
> Aftercare Tracking Sheet

Printing with Microsoft Internet Explorer
The website generates the documents in Adobe PDF format and displays them within your web browser. There are several ways to print documents from Microsoft Internet Explorer. To print you may select 'File' and then 'Print' from the browser menu, or you can use the print icon.

The Print icon can be found on either the toolbar for your browser, or the Adobe PDF toolbar for the document.

When you click on the Printer icon , or select 'File' and then 'Print' from the menu, a print dialogue box will open. Using the print dialogue box you can select the printer you want to use and the number of copies to print for each document.

Accessing previously entered records
The website allows access to previously entered records. You may:
- Access, modify and print 'open' records (documents not yet faxed to us) entered by anyone at your location
- Access and print 'submitted' records (documents faxed to us) – once submitted, records cannot be modified. Please contact us if a change is required.

** Please direct any additional questions to Bob Howden or Andrea Spencer at (905) 822-7675 **