Creating and Archiving Deeds

Owner	EIS Business Systems
Version	1.0
Date	10 July 2018

Revision History (Document Control)

Version	Date	Modified by	Reviewed by	Change Description/Summary
0.1	1/03/2017	KJ		Initial document
0.2	26/03/2018	KJ		Updated to reflect new deed attribute for 'Parcel ID'
0.3	09/07/2018	DAT		Updated with technical information and correct delegated authority procedure

Glossary:

Deed: This term is not used in New Zealand. In K2 this refers to a parcel of land.

Tenure: This is ownership.

Deed Description: This term is not used in New Zealand. This is the appellation (the name of the parcel).

Certificate of Title: The term 'title' refers to the CFR (Computer Freehold Register).

Parcel ID: This number is the parcels unique identifier that allows us to geo locate the parcel.

Parcel: Refers to a specific area of land defined by survey.

Land Registration Documentation: When an area of land is created as a parcel it is first defined by survey and then receives an appellation and parcel ID, Collectively this is known as Land Registration Documentation'.

LINZ: **L**and **I**nformation **N**ew **Z**ealand are responsible for all land registration in New Zealand.

Gazette: When land is acquired or disposed of this is recorded in the New Zealand Gazette. We record this by noting the year and page the legalisation was published on.

Purpose:

This process is for creating deeds. Only the **Team Administrator, Infrastructure Delivery – Ownership and Occupancy** can enter new Deeds.

Scope:

Deeds can only be created by **Team Administrator, Infrastructure Delivery – Ownership and Occupancy.** Deeds can only be added or archived if approved by the correct delegated authority. Deeds can only be entered after the parcel has all relevant land registration documents assigned by LINZ (i.e. appellation, survey and parcel ID identifiers).

Deeds should only be created or archived when:
1. A new land parcel has been purchased by the Ministry (may require creation of a new dummy site)
2. Ministry owned land has been sold (may require creation of a new dummy site)
3. The Ministry has leased land
4. The Ministry cease's to lease land

Standard Operating Procedure for Helios Administrator

Responsibilities and Accountabilities:

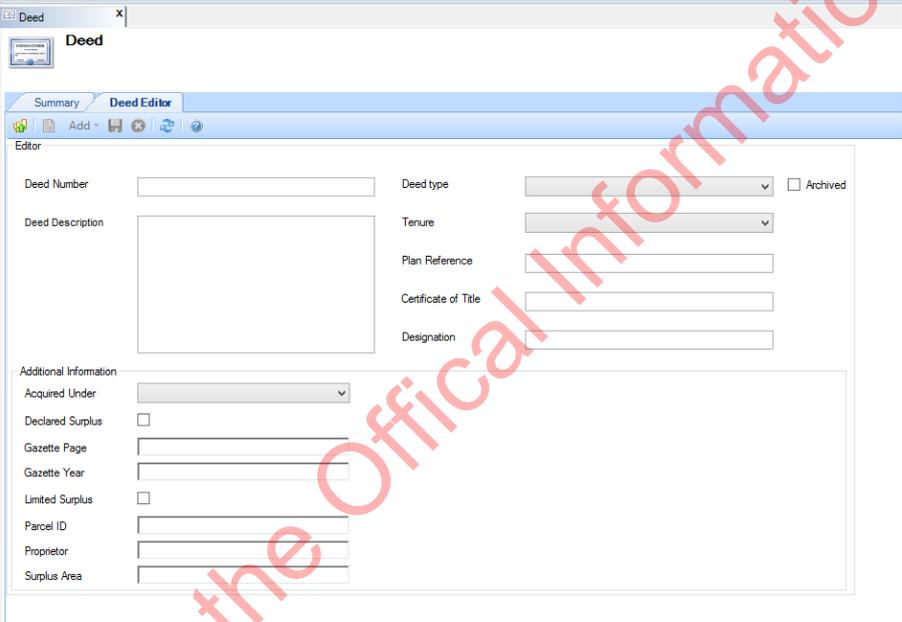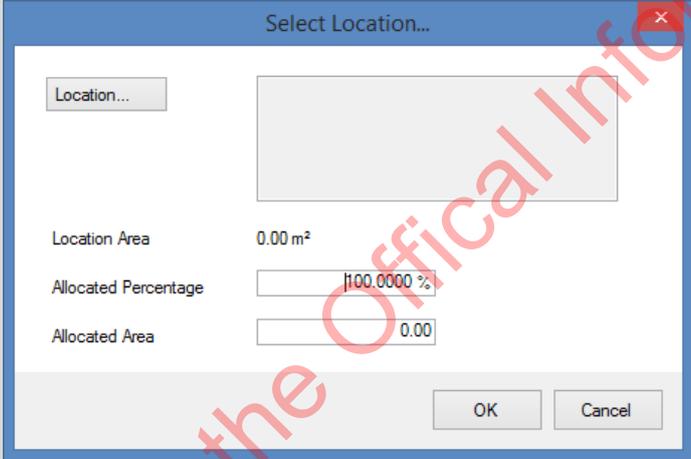| Who	Responsibility
User	Log a request for a new Deed to: land.information@education.govt.nz
Team Administrator	Investigate and take action as appropriate

Frequency:
As required

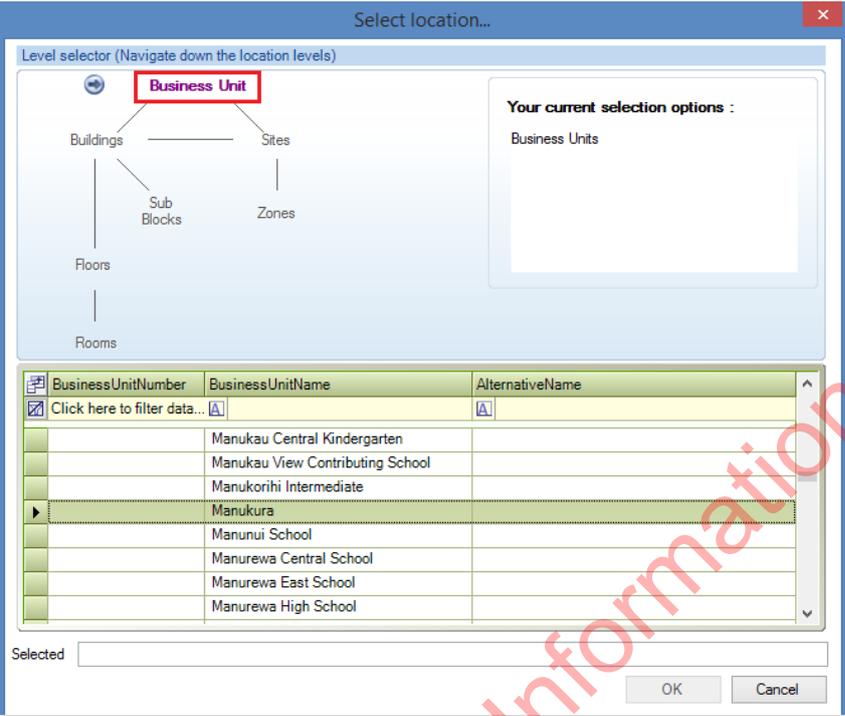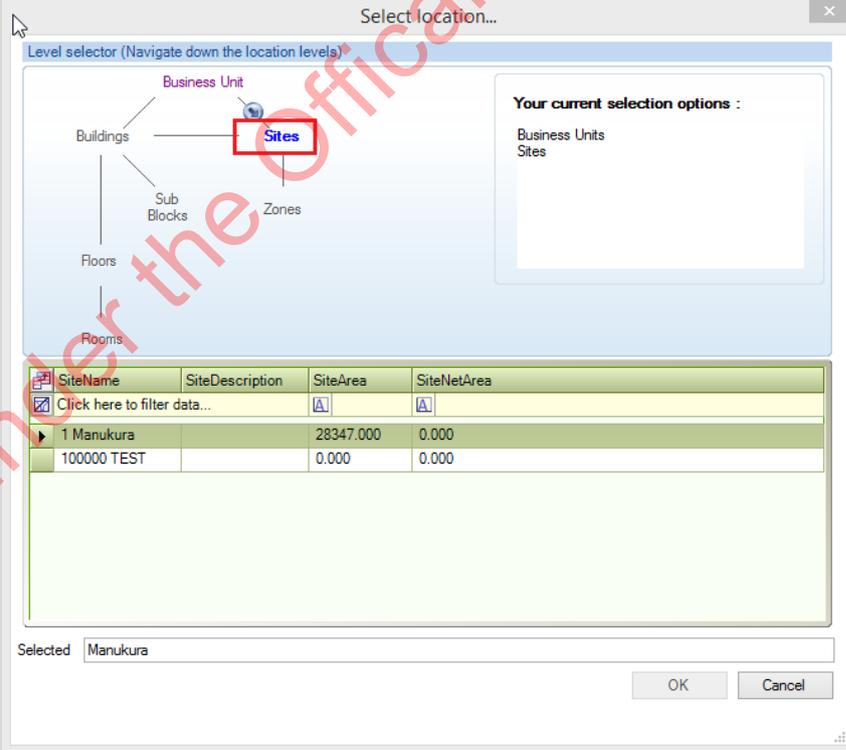### Prerequisites:

|	What to Check	Reason for Checking / Risks Involved
1	The delegated authority for acquisition and disposal has approved the action	Authority to approve the acquisition and disposal of land is limited to only staff with delegated authority. Deeds can only be created or archived if approved by the correct delegated authority. Delegated Authority Schedules can be found here: http://intranet.moe.govt.nz/organisation/policies/delegations-policy/ - The Ministry cannot acquire land unless signed by Deputy Secretary EIS (Head of Education Infrastructure) or higher (financial delegation). - The authority for a Board of Trustees to acquire land is subject to clause 33 of schedule six of the Education Act 1989 (statutory delegation). - The authority for a Board of Trustees or the Ministry to 'dispose' of land is subject to section 71B of the Education Act 1989 (statutory delegation).
2	Land Registration Documentation	Before a parcel can be added it must: - Be defined by survey - Have an appellation - Have a Parcel ID - Be held in a CFR (the CRF must be held by HMQ for an education purpose for all acquisitions) - Be legalised as Education (be held in CFR or Legalised as Education land for all disposals) * All land added or archived in K2 for acquisition and disposal of land **must occur after sub-division if sub-division is planned.**
3	The site has the correct area before the deeds are added	K2 auto populates areas: so all sites areas must be correct before deeds are entered.

Process Steps:

Creating and Modifying Business Units		
Step	**Who**	**Action**
1	Helios Admin	Search for the business unit, and then navigate to site which needs a new deed to be created. **Note**: If new site with no existing deeds, check that site area is correct. If it is, then populate with correct value before creating deeds. If new land being added to an existing site, site area needs to be increased before adding the new Deed. To calculate the correct area for the site: add all deed area's together (including any new deeds). The site area needs to be correct before the addition of any new deeds).
2	Helios Admin	Create the deed. In the **Tasks** panel, select **New Deed,** Fill in the required fields;

Field	Mandatory?	Input	Notes
Deed Number			This is automatic
Deed Description	Yes	Appellation	Lot or Section as identified by survey i.e. Lot 1 DP 7002 or Section 2 SO 458678
Tenure	Yes	Select from dropdown	It is important to ensure Tenure is recorded correctly
Plan Reference	No	N/A	N/A
Certificate of Title	Yes	CFR	Computer Freehold Register (CFR) Identifier: i.e. NAS54A/987 or 45698
Designation	No	N/A	RMA designations are not managed by K2
Acquired Under	No	N/A	N/A
Declared Surplus	No	Check box	N/A

Creating and Modifying Business Units					
Step	**Who**	**Action**			
		Gazette Page	No	Numeric	Legalisation Reference
		Gazette Year	No	Numeric	
		Limited Surplus	No	N/A	N/A
		Parcel ID	No	Numeric	It is important to ensure the Parcel ID is recorded correctly
		Proprietor	No	Free text	Identifies owner where land is not Education land: i.e. if land is leased by the Ministry the land owner is recorded as 'proprietor'.
		Surplus Area	No	Decimal	N/A
		Save when done			
3	Helios Admin	Save the deed and fill in the next window. Identify **Location** 			
4	Helios Admin	For the Location – 1. Select Business Unit, highlight the business unit from the list and double click			

Creating and Modifying Business Units

Step	Who	Action
		 2. Select **Site**, highlight the site from the list and double click 3. Press **OK**

Creating and Modifying Business Units		
Step	**Who**	**Action**
5	Helios Admin	If the site already exists ensure you have set the correct site area before populating the deed entry, the allocated percentage and allocated area will auto-populate. If the area doesn't auto populate then correctly add the area as m² in 'Allocated Area'. Enter the parcel area in m² in 'Allocated Area'.
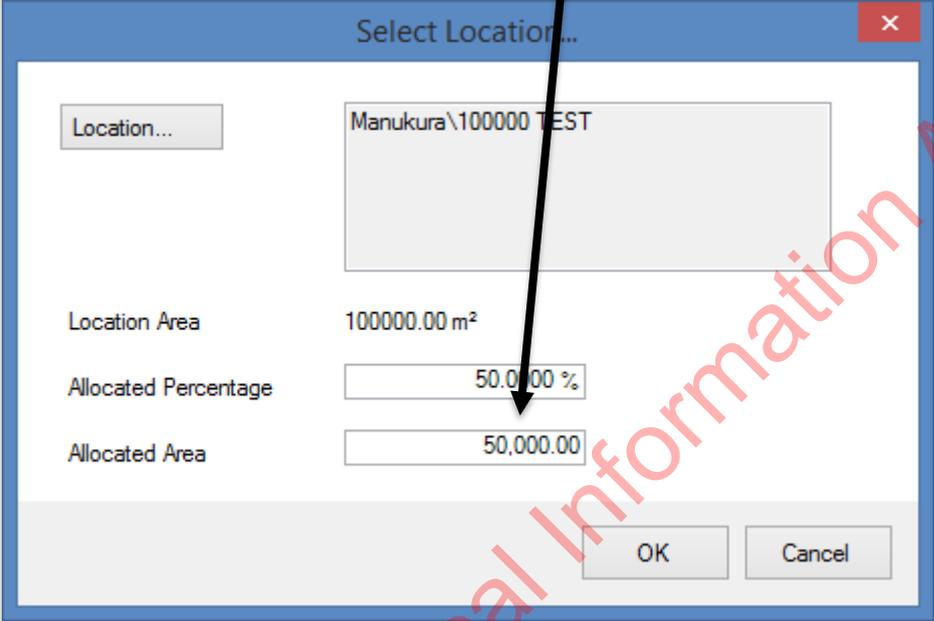
*Add documentation to site under Documents

*Add documentation to school summary under Documents

Documentation required (from Asset Register Acquisition Checklist):

- New Parcel ID
- Full Survey if Undertaken (i.e. all pages)
- Legalisation (i.e. copy of Gazettal declaring area surplus)
- CFR (Computer Freehold Register)
- Disposal/Acquisition Memo (signed)
- Copy of Sale and Purchase Agreement (full)