

Simplified Probate Solution



Empower your office with Bluestone Comprehensive Probate Solution

Let our software do the work for you

Many business issues arise when probating a will or managing adoptions, guardianships, minors' accounts, and trusts. Bluestone is a powerful solution of workflow processes that permit end users to enter key case information once. Case information is keyed into the easy-to-use GUI. All case-specific forms are created and prepared for presentation to the client for easy review, signature and seal. Presently many offices key the same case information into multiple systems that do not share information between themselves. The Bluestone solution integrates these systems and:

- Increases efficiency
- Eliminates data entry mistakes
- Secures confidential information

Simple & effective case processing

Bluestone empowers your office with data & software capture tools from which staff can easily search & retrieve documents from one system. From this comprehensive and powerful system, your staff can perform various cashing, financial record keeping and search & retrieval functions in regard to all of your cases.

We provide the architecture to capture, manage and integrate all of your daily processes into one comprehensive and robust solution, customized to your probate system needs.

Solution Benefits

- Utilize your office's forms
- Master form template never changes even when your staff edits the current form to support case requirements
- Redaction of sensitive information, e.g. cause of death found on death certificates
- Multiple tender amounts can be used as payment
- Escrow accounts
- Create daily, weekly, monthly & quarterly reports by case type or by staff member
- Prepare state reports, eliminate the need to manually track cases
- Create receipts linked to cases & a full range of follow-up financial reports
- Interest posting status by account
- Maintain full audit trails of all case & financial records
- Flexible integrated reporting
- Link cases & sequence revisions



Seamless Integration

CBS-Bluestone and its customers worked closely to deliver a solution built on MS .NET Framework that utilizes a SQL database which will integrate with your offices existing practices. The solution has transformed the way in which Probate and business processes are managed while improving the service to your clients during a difficult time.

#	Deceased Name	Address	File Date
00038	MINOR JANE JANE H	34 MAIN STREET	05/17/2006
00039	TOMLINSON PHYLLIS T	24 NORMANDY ROAD	05/17/2006
00043	MINOR JOHN H	23 WEST STREET	06/13/2006
00192	MAHER PHYLLIS R	ADDRESS	07/25/2006
00193	FOX FIRE JOHN H	550606060	07/24/2006
00210	EFIE 2 JOHN H	23 MAIN STREET	08/09/2006
00209	TOMLINSON JOHN H	SADASDA	08/08/2006
00205	NEW WILL JACK H	34 MAIN STREET	07/31/2006
154-06-A	ADOPT MARY MARY T	23 MAIN STREET	07/31/2006
001	OLD FILE BILL H	34 MAIN STREET	07/31/2006
00207	EFIE CASE MARK H	23 MAIN STREET	08/01/2006
00208	TOMLINSON JOHN H	34 MAIN STREET	08/01/2006

Imagine the capability to vastly improve the workflow and business process management crucial to sensitive information processed during daily transactions in your office.

With Bluestone, not only can you manage the information of each case but you can easily search and retrieve the actual completed document and view it without retrieving the physical paper file.

Basic Will WILL Back: File Case

Docket Number: Case Status: AC

File Date: 10/18/2006 Application: 10/18/2006 Issued: 00,00,0000

Case Information

Last Name: SMITH Date of Death: 00,00,0000
 First: JOHN Date of Will: 00,00,0000
 MID: H Suffix: JR Date of Birth: 00,00,0000
 Age: 78 Sex: Male Date of Court Order: 00,00,0000
 Address: 23 MAIN STREET
 Township: WD
 Town/Township: West Long Branch
 County: West New York
 State/Zip: West Paterson
 Country: West Inlandwood
 Marital Status: Westside
 Value Estate: .00
 Value Bond: .00

Solution Features

Capture

- Case information
- Electronic processing of your forms
- Cashiering and receipting

Integrate

- Using CBS-Bluestone Imaging System or most existing imaging system platforms
- Scanning
- Websites
- E-mail messages

Manage

- Will documents
- Adoptions
- Guardianships
- Minor's intermingled accounts
- Trusts
- Interested parties
- Executors
- Codicils
- Caveats
- Assets
- Court appearance calendars
- Superior Court cases
- Reminder alert messages for court appearances & next step reminders for cases
- Financial record keeping
- End-User security rights
- Flexible searches
- Extensive reporting sub-system

