

Creating Legal Forms

Creating Legal Forms with Microsoft Word

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Creating Fillable PDF Forms with Adobe Acrobat

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PDF Forms vs. Word Processing Forms

Word processing based forms are very useful when you are drafting a document in your office. However, there are several reasons why you might want to create a PDF form. First, there are times when you want someone else to complete one of your forms without worrying them changing the form itself. There are also times where you have to routinely complete paper forms for courts or government agencies. PDF forms work in both of these situations. You can create a form that your clients can fill in but not alter or you can create forms that are acceptable to a court because it is in the exact format of the original paper form.

Acrobat Form Tools

Adobe Acrobat Standard or Professional allows you to create interactive forms from other applications like Microsoft Word, from existing PDFs or from forms that you scan and save to PDF. Acrobat forms can contain a variety of field types, fonts and features. Once you have created your form, you can distribute it and collect data from recipients.

Creating a Fillable Form

Create a fillable form with Acrobat is very easy. The first step is to make sure the form is a PDF. Save or print your Word document to PDF or, if your form is currently on paper, scan and save it to PDF. Next, run the Form Wizard on the PDF. Select create form and follow the prompts. The Form Wizard will analyze the form and find everything that looks like a field. It will even try to give it an appropriate name based on text around the field. The Form Wizard will not get everything right but it does a good preliminary job of locating fields.

Edit the Form

Once the Form Wizard has analyzed your form, you should review it and correct any errors. There may be stray lines and boxes on the form that the Form Wizard identified as fields and you will need to delete these. You will also want to rename all of the fields on the form with logical names. While you are editing fields, format the fields for a specific data type (text, date, etc.) or font.

Saving and Distributing Your Form

Once you have created and edited your form, you are ready to save and distribute the form. Saving a form locks it from editing. You can now send it via email or post it to your website. Adobe also provides tools that allow you to collect and analyze the data from distributed forms.

Document Assembly with HotDocs

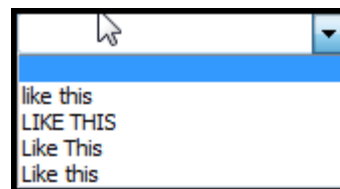
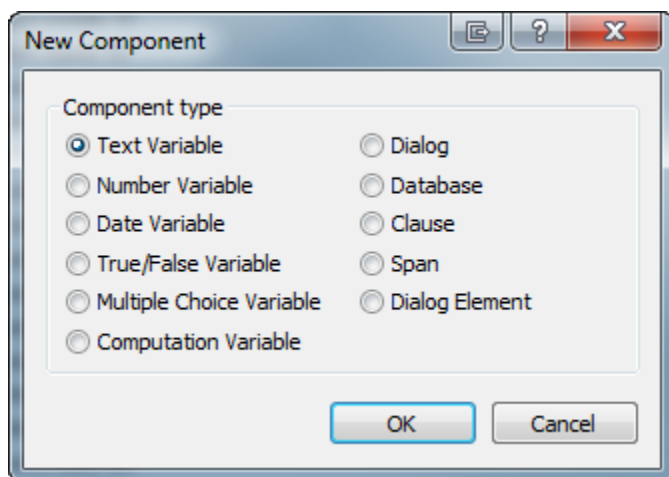
Jeffrey S. Krause

HotDocs Introduction

HotDocs is document generation software. Like the merge function of Microsoft Word, HotDocs allows you to turn existing word processing documents into templates. Also like Word templates, HotDocs templates allow you to insert variables inserted into standard text and data to complete the documents can be pulled from many sources.. However, HotDocs is much more powerful than Word or WordPerfect alone.

HotDocs Variables

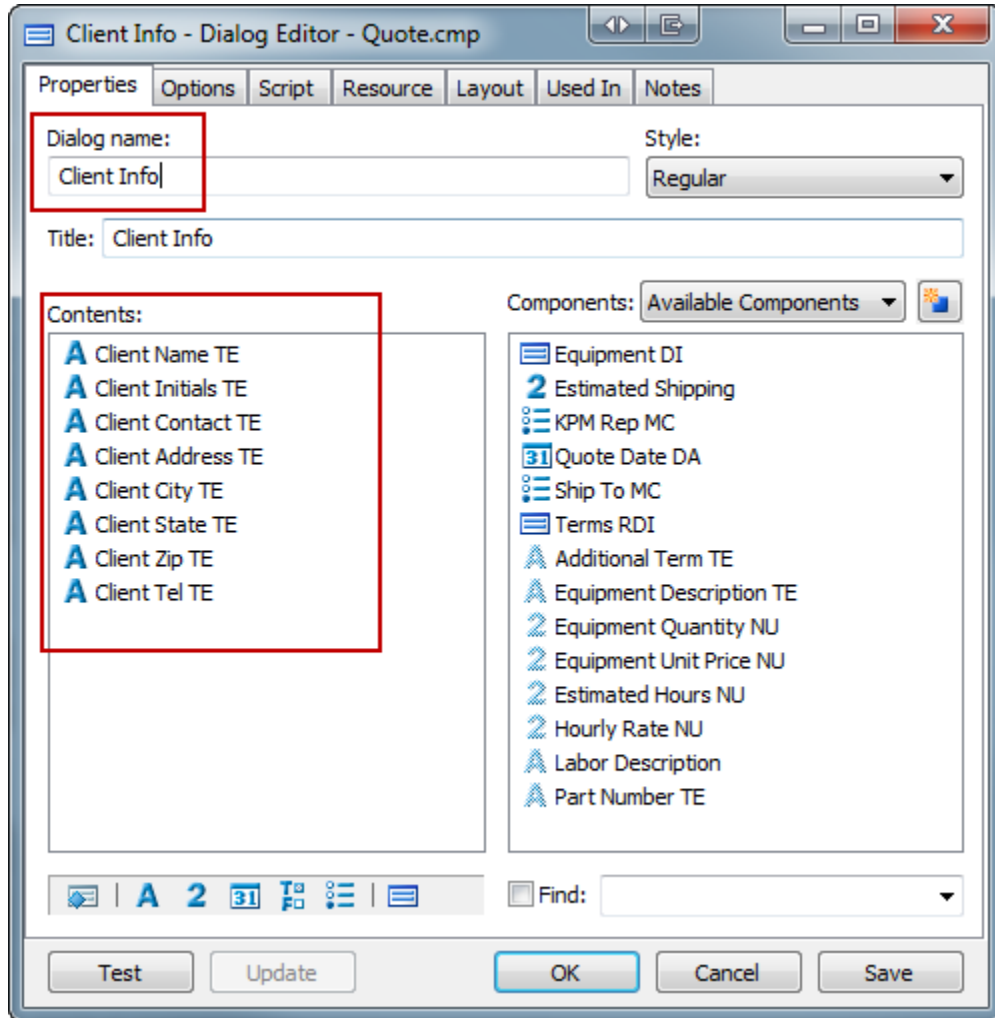
HotDocs provides greater control over variables and variable formatting than Word or WordPerfect alone. HotDocs variables can have many different formats, including text, number, date, true/false or multiple choice. You only have to create a variable once. If you use it later, it can be have a slightly different format. For example, the same variable can be returned as Jeffrey S. Krause in one section of the document and JEFFREY S. KRAUSE in another.

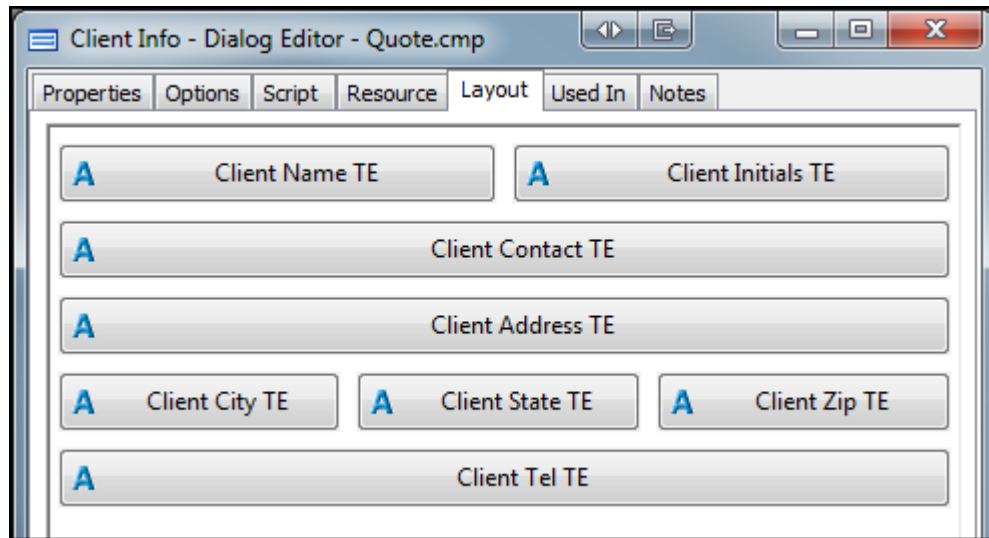


The Interview

Unlike a merge, in which variables are inserted automatically in a specified order, HotDocs prompts the user for the appropriate information each time in an "Interview." The template

designer configures the Interview to ask the questions in whatever order they choose. Questions are combined in logical groupings called dialogs. If, for example, you want to enter all of the client's information in the beginning of the interview, you can combine all client related questions into a single dialog and arrange the questions in any way you like.



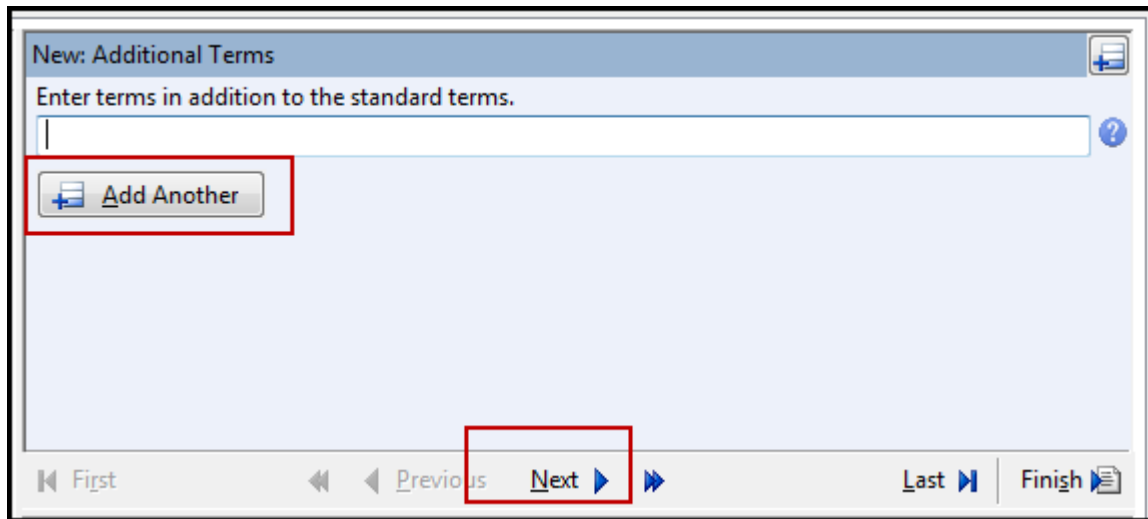


HotDocs Repeating Dialogs

HotDocs allows you to repeat questions until you have provided all possible answers. For example, you might want to list all of a client's children in their will but some clients have no children, some have two children and others have four. A simple repeat dialog asks the questions over and over again until you stop answering. In the example below, the repeat dialog (RDI) is asked over and over again as long as the user clicks add another. When they click next, it moves to the next section of the Interview.

Terms:

- The above Quote defines the exact products, services, and pricing to be provided by Krause Practice Management, LLC
- Pricing for hardware and software is not guaranteed until the order is placed
- Quoted labor hours are an estimate only. Client will be billed for actual number of hours worked
- All pricing shown is an estimate only
- The tax listed in this quote is for equipment only. Sales tax on labor, where applicable, will be charged at the time the labor is billed
- Krause Practice Management, LLC collects sales tax for goods (and many services) in the State of Wisconsin. Clients in other states are responsible for reporting use tax, if applicable.
- «REPEAT Terms RDI»«Additional Term TE»
- «END REPEAT»



Conditional Logic

Finally, HotDocs templates can incorporate conditional logic. Conditional logic is a powerful tool that allows you to hide questions until you need them. For example, if they client has no children, there is no point in asking their names or birthdates. Conditional logic can be used to hide these questions and reveal them only if you answer “Yes” to another question “Does the client have children?” Conditional logic also allows you to automatically answer questions based on previous answers.

```
CLEAR Documents to assemble MC
IF Switched TF = FALSE
  IF Documents to create for him MC = "W"
    ADD "W|Will" TO Documents to assemble MC
  END IF
  IF Documents to create for him MC = "T"
    ADD "T|Trust" TO Documents to assemble MC
    IF W03c Joint trust TF = TRUE AND W13 Children TF
      IF Count children NU < 5 AND Count children NU > 0
        ADD "FC|Flow Chart" TO Documents to assemble MC
      END IF
    END IF
  END IF
END IF
IF Documents to create for him MC = "F"
  ADD "F|Financial Powers" TO Documents to assemble MC
END IF
```

HotDocs Pricing

HotDocs comes in three primary versions. HotDocs Developer Pro is the most expensive (\$800.00) but it includes several of the most critical components, including the scripting language necessary for some of the more advanced conditional logic. Developer Light

(\$525.00) allows you to develop and edit templates, with the exception of a few tools found only in Developer Pro. Finally, HotDocs User allows users to assemble documents from templates. Most firms purchase one copy of Developer Pro so that their primary template developer has the necessary tools and purchase Developer Light or User for the rest of their staff.

HotDocs Consulting

HotDocs is an amazing tool for document assembly. There is almost no legal technology tool that provides a greater productivity boost or return on investment. However, while creating simple templates is easy, developing sophisticated templates requires a significant amount of time and expertise. For example, an experienced developer may need 100 hours or more to create an integrated set of estate planning templates. Imagine how much time it would take a new user to do the same. This should not discourage you. It simply means that you should perform a return on investment analysis on any HotDocs project. How much will it cost (time or money) to have the templates created and how much time will they save you once you are using them?