Utah

Legal

Suite

Operations

Manual

Installation Instructions

WARNING: HotDocs MUST be installed prior to installing Utah Legal Suite

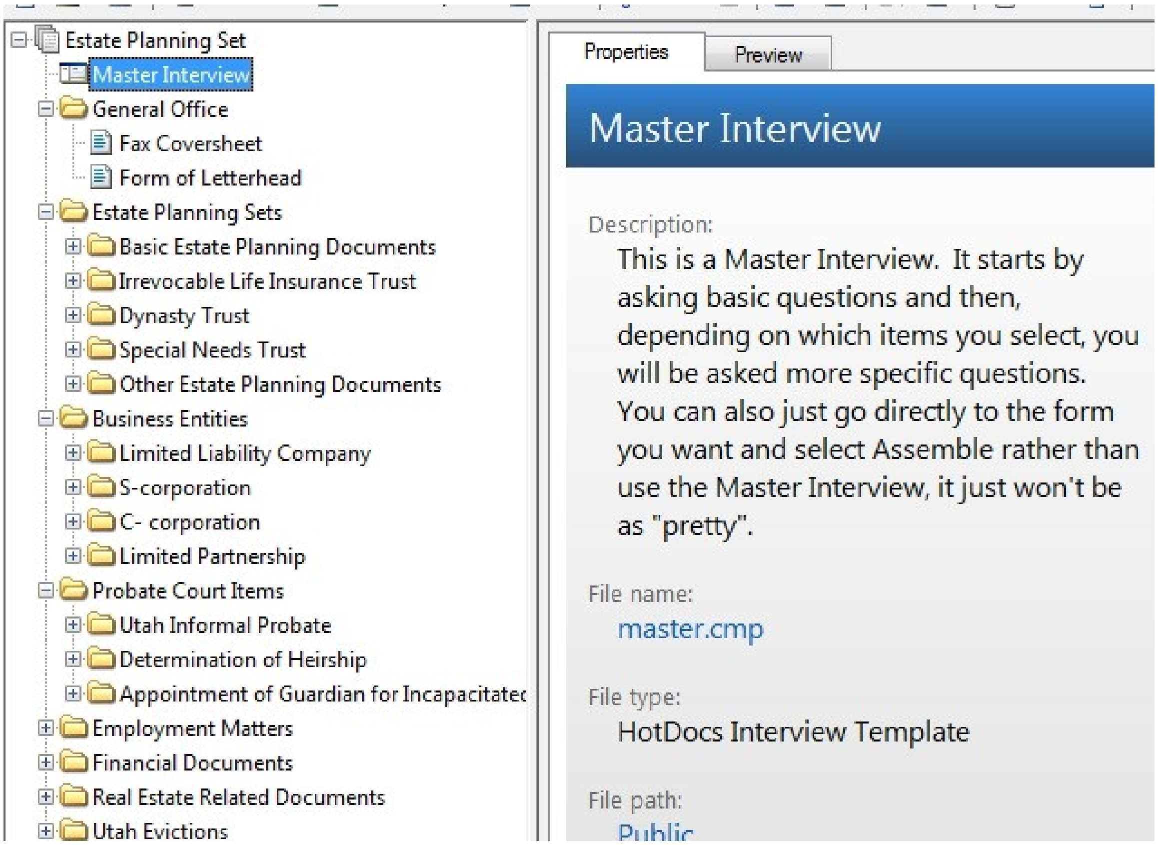
Utah Legal Suite is a HotDocs based document assembly system. In order to function, HotDocs MUST be installed first.

To install HotDocs, go to hotdocs.com. Either HotDocs User or HotDocs Developer will work with the Utah Legal Suite System. Note that HotDocs User allows you to use the Utah Legal Suite System whereas HotDocs Developer will allow you to both use and edit the Utah Legal Suite System. HotDocs Developer should only be used by experienced HotDocs developers.

Once you have installed HotDocs, you may then save the Utah Legal Suite file to your computer. Double click on the Utah Legal Suite file and it will auto-install the entire system onto your local computer. Follow the on-screen instructions for where you desire to save the Utah Legal Suite System.

OPERATION INSTRUCTIONS

The Utah Legal Suite System starts with the main menu page:

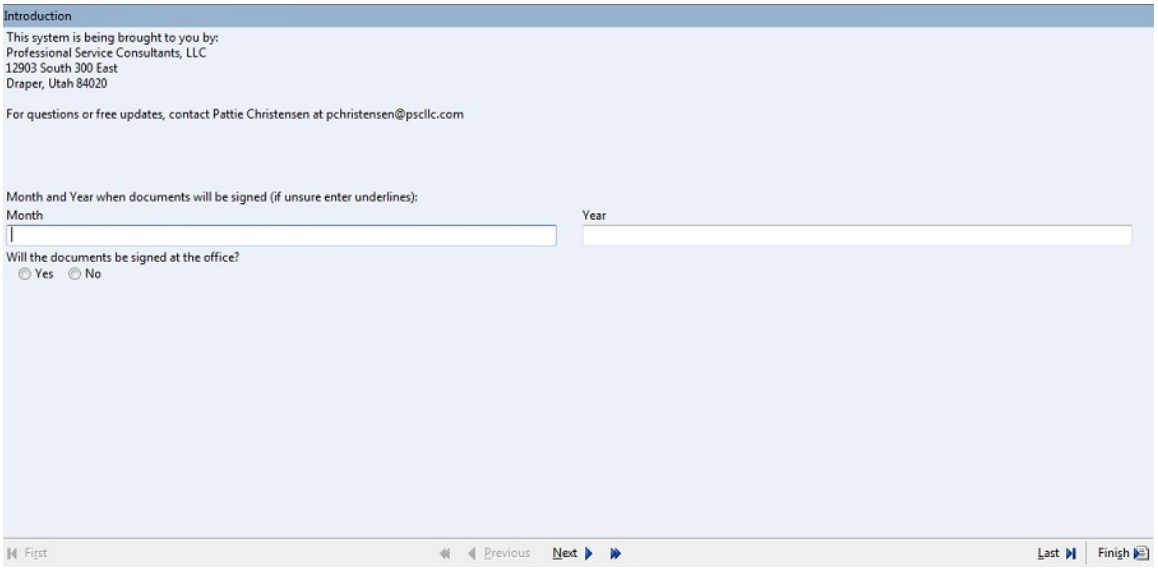


The main menu page shows the various documents and sets that are available. Along the left side of the screen, you will see all of the documents and sets that are available to you. Each set is organized in a folder. When a folder is "closed" you will see a plus sign to the left of the set. If you click on the plus sign, the folder will open and you will see the various documents in that folder. For instance, if you look above, you will see that the General Office folder has been opened to reveal the Fax Coversheet and Form of Letterhead documents. You can click on the minus sign and the folder will close making it easier to see the various folders. If needed, you can scroll down to see more folders and documents.

On the right side of the screen, you will see a summary of the highlighted folder or file. Read the summary to find out any specific information about the folder or the specific document.

You will see that the item highlighted above is the Master Interview. The Master Interview is the primary answer gathering questionnaire. Generally, you will want to use the Master Interview to answer questions as all of the questions will be well organized. If you are only preparing a single document for the client, you can skip the mater interview and go directly to the specific document and answer the questions there.

To start the master interview, simply double click on the Master Interview words. (You can also highlight Master Interview and select Assemble.)

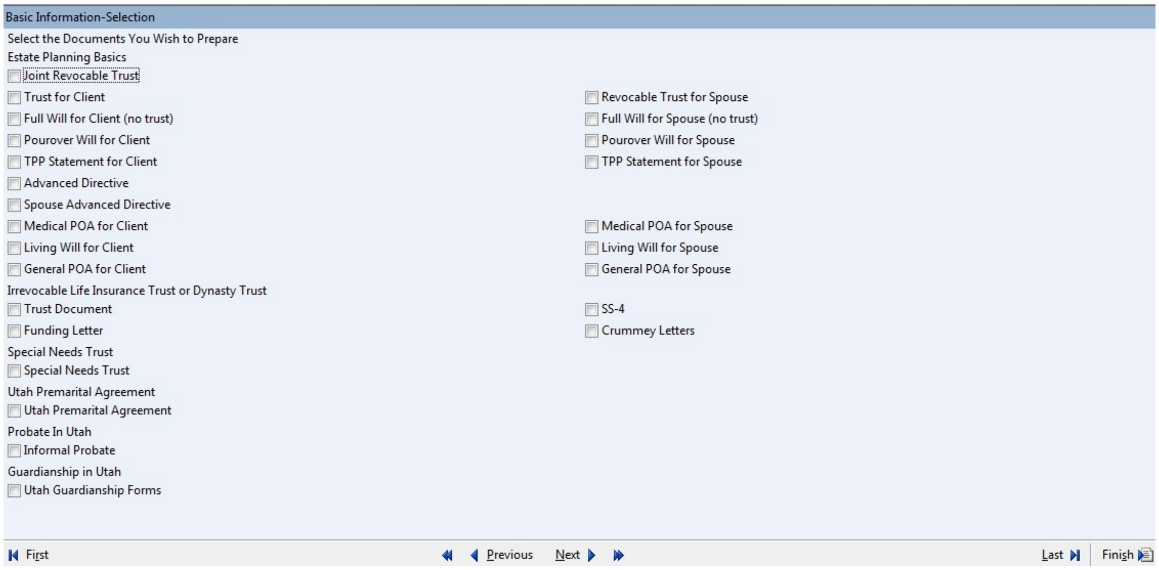


The first screen in the master interview provides contact information for us. In addition, it asks you what the month and year should be on the various documents. You can enter anything in these spaces... "April" or "____". Please note that whatever you enter here will be entered directly into the documents. Hence, you will want to avoid shorthand, unless that is what you want to appear in the created document.

Once you have answered the questions, select "Next" at the bottom. (You will also see "Last" and "Finish" at the bottom. Those options are used when you have already completed the questions.)

The next two screens ask what documents you wish to create for this client.

Simply select each option that you want to create. You can select multiple options per client. The options you select will bring up the specific questions for those documents. You will only be asked the questions for the documents that you select. You will not be asked questions that deal with other documents.



After the Basic Information screens, you will be asked questions about the client and his/her family. Note, if you are preparing documents where the family is not relevant, you can simply answer No to the questions on whether the client is married and/or has children. Be sure to enter the client information as that is used in document creation.

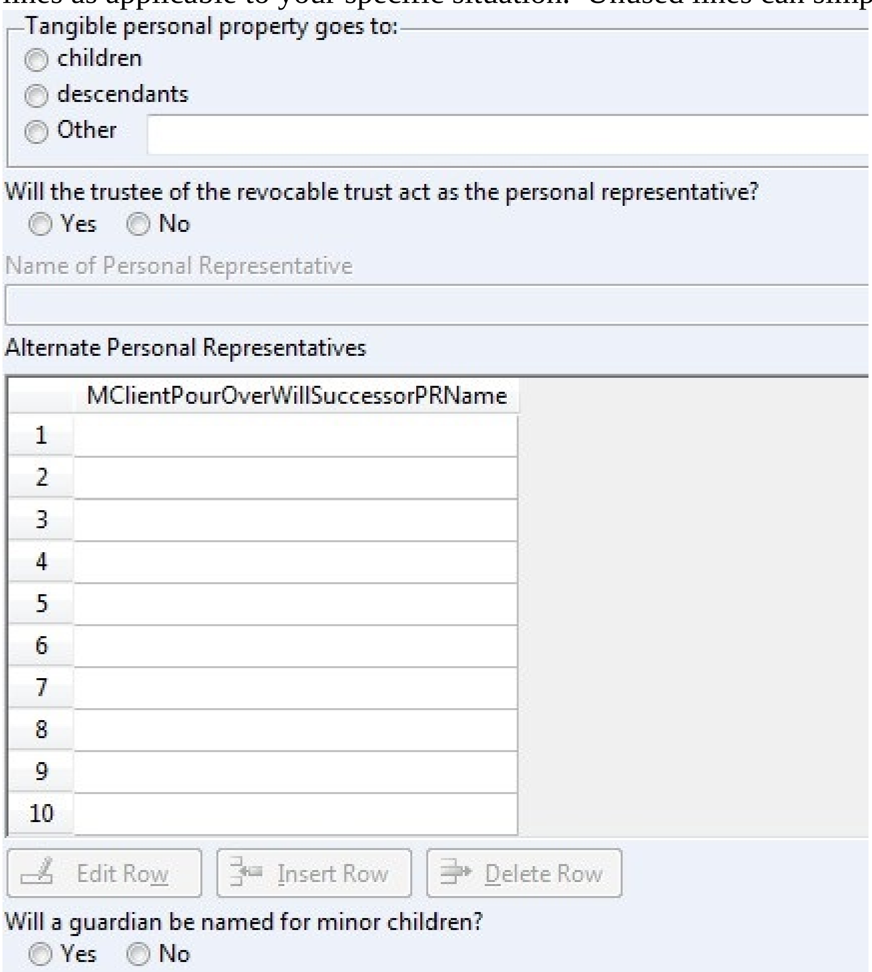
The Children screen is an example of a "repeat" dialog. You will see that at the bottom of the Children screen there is a box that says "Add Another". When you select that box, you will be able to add another child's information. You keep selecting that for as many children as you need. Do not select "Next" at the bottom until you have entered all of the children in the dialog. The same is true for any other "Repeat" dialogs in the system.

Also, you may find that you need to be able to scroll down to see all of the questions on a given screen. You can use the scroll bar at the right to scroll up and down the various screens as needed. It is very important to scroll down whenever you see the scroll bar on a screen. There may be important questions out of sight until you scroll down. In addition, if there are questions for which you do not know the answer or that aren't applicable to the work you are doing, you can simply not answer those questions.

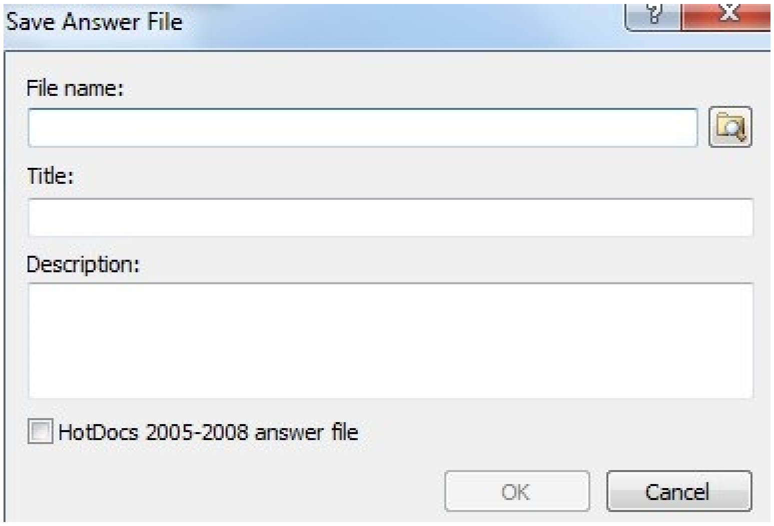
Depending on the documents you desire to create, you will have unique screens. On some of the screens you will notice that some of the questions are "grayed out." This means that you cannot answer that question because it is not applicable to your answer set.

In the screen shot below (which relates to the Probate set), you will see the "Name of Personal Representative" question is grayed out. This is because unless you answer "No" to the preceding question, that question is not applicable. If you select "No" on the preceding question, The "Name of Personal Representative" question will immediately become active and you will be able to answer the question. It is not necessary to back up to a previous screen when you make any of these changes; the gray and ungray features will happen immediately.

In addition, in the screen shot below you will see a table that allows you to enter multiple Alternate Personal Representatives. When you see a table, you fill in as many lines as applicable to your specific situation. Unused lines can simply be left blank.



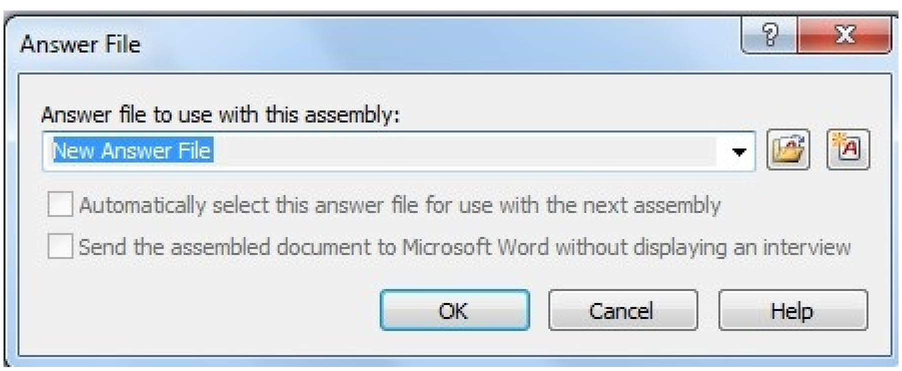
Once you have answered all of the applicable questions for your selections, you will be asked to save your answer set.



You are free to save your answer files however you wish. I recommend that you have a standard protocol for naming your answer files. These answer files are saved for future use so that you don't have to reenter information for repeat clients. For example, if you have an estate planning client that wants to form an LLC, you don't want to have to reenter the client's name and address again. Instead, you can simply use the existing answer file.

Now that you have answered all of the questions and saved your answer file, you then go to each of the documents that you wish to create. Highlight the document(s) that you wish to create. Note that you can highlight multiple documents (such as in the estate planning set). You then select "Assemble" to start the assembly process for the desired documents.

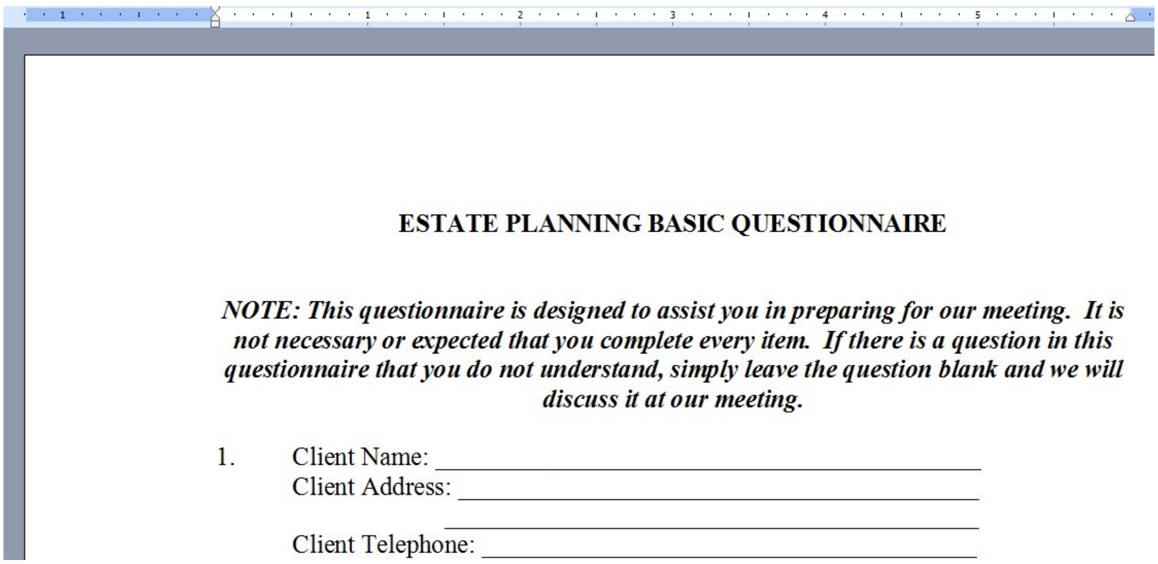
You will first be asked to select an answer file to use:



You will see the arrow just to the right of the answer file name. Selecting that will show you the last few answer files that you have created. If you want to use an older answer set, select the small box that looks like a file folder with a single sheet inside. That selection will list all of your answer files. If you want to create a new answer file, you select the right most box (that looks like a letter with a star on the top left).

There are also two check boxes available. Selecting the first check box will leave your answer file selection active for future document selections. Use this if you are going to be preparing multiple documents for this client (such as if you are preparing a full estate planning document set). The second check box is selected if you are sure that you have answered all of the applicable questions and do not want to double check your answers before preparing the documents. If you are not positive that you have answered all of the questions, or if you want to change some answers, do not select the second box and you will see the applicable questions for this particular document asked again.

Once you have either answered all of the questions or skipped the questions, the software will then immediately create your document.



ESTATE PLANNING BASIC QUESTIONNAIRE

NOTE: This questionnaire is designed to assist you in preparing for our meeting. It is not necessary or expected that you complete every item. If there is a question in this questionnaire that you do not understand, simply leave the question blank and we will discuss it at our meeting.

1. Client Name: ____
   Client Address: ____
   ____
   Client Telephone: ____

The prepared document is automatically shown in Microsoft Word where you can review and edit as desired. When editing documents, please note that most major documents have automated tables of contents, cross references and the like. Be careful not to damage those cross references and links. To update the cross references and table of contents, press Control-A then F9.

If you do not answer a necessary question, you will see the missing information along with stars in the document (such as ***Date Of Trust***) or else you will see underlines ("__________"). The stars will draw your attention to the missing information.

You may save your documents in whatever filing system you have in place. Often the default document title is the first line of the document or else the file name in the Utah Legal Suite system. But you are free to save the document however you desire.