

#### Probate Document Forms

QuickStart User Guide

#### Accessing your Account

- 1. In your web browser, visit <u>www.hotdocsmarket.com</u>
- 2. Click **Sign In** and enter your email and password
- 3. Click on **My Account** in upper righthand corner (*green button*)

Note: you may be prompted to initially select check box to accept HotDocs Market Terms And Conditions

#### www.hotdocsmarket.com



## Login

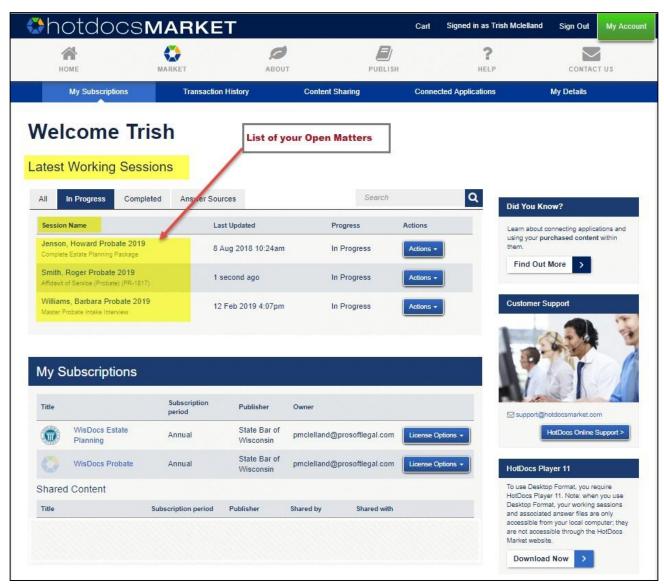


# My Account Page (main)

HotDocs Market uses the term "Session" which means "Matter."

When you see the word "Session" used herein, think "Probate Matter" and all the documents associated with it.

A "Session" is the **entire** probate matter, start to finish.



#### About WisBar Probate Forms

WisBar Probate Forms is a broad collection of Court forms. The most commonly used forms are automated using a Q&A (decision tree) approach and generate completed documents. Some forms that are less frequently used are not automated but are included here for convenience so you can download and complete them manually.

While most of the automated forms are generated in PDF format, some of the more complex forms are generated in Word. This includes many of the "Attachments" such as the Proof of Heirship and List of Interested Persons.

Those attachments must be generated as separate documents.

# Creating a New "Session" (Probate Matter)

#### **Master Probate - New Matter Intake:**

Probate is process driven, with documents generated in a sequential manner, but not always a predictable manner over months or years.

Creating a new matter begins by running a Master Probate New Session Intake interview. This interview is the REQUIRED first step before preparing any documents. It collects basic information about the Decedent, family members, heirs, prior planning information (wills, trusts) and other general information. **NOTE: This is a data gathering event only.** No documents are generated at the conclusion of the Master Probate New Session Intake interview. If you don't have all of the information, no need to worry. You can usually leave fields blank and complete them at a later time.

#### **Session Answer File:**

At the conclusion of the master intake interview, the system automatically creates a unique Session Answer File for this probate matter. That file is cumulative, storing ALL data gathered as each document is prepared so that it can be used for other documents (if relevant).

#### **Document Generation**

#### **Generating a Probate Document:**

The first document created will usually be an application or petition to open the probate matter with the court.

Documents will be prepared in a sequential manner, depending on the nature of the probate, the issues that arise during the probate process, and other considerations.

This is a dynamic process and the documents needed may be different for each probate matter.

#### Attachments

As noted earlier in this tutorial, some attachments, addenda, and schedules are generated with the source PDF form while others are generated as separate documents in Word.

Where attachments, addenda, or schedules were to complex to program in PDF, they were created as separate Word templates.

#### Attachments, Addenda, & Schedules

Proof of Heirship (Formal/Informal) (PR-1806) (PDF)

Proof of Heirship ATTACHMENT (Formal/Informal) (PR-1806) (Word)

Petition for Formal Administration (PR-1901) (PDF)

**Application for Informal Administration (PR-1801) (PDF)** 

**Petition for Special Administration (Formal) (PR-1850)** 

Interested Persons List (ATTACHMENT) (Word)

Notice Setting Time to Hear Application and Deadline for Filing Claims (Informal) (PR-1805) (PDF)

Missing Persons List (ADDENDUM to PR-1805) (Word)

Estate Account (Formal/Informal) (PR-1814) (PDF)

Estate Account (Formal/Informal) Supporting Schedules (PR-1814) (Word)

Notice Setting Time to Hear Application and Deadline for Filing Claims (Informal) (PR-1805) (PDF)

Missing Persons List (ADDENDUM to PR-1805) (Word)

Estate Account (Formal/Informal) (PR-1814) (PDF)

Estate Account (Formal/Informal) Supporting Schedules (PR-1814) (Word)

# Saving PDF Files to Word

While most of the official Circuit Court forms are published in PDF, some local court clerks are now requiring that certain documents be filed in a Word (editable) format.

If this is necessary, you can save the PDF file to Word as follows:

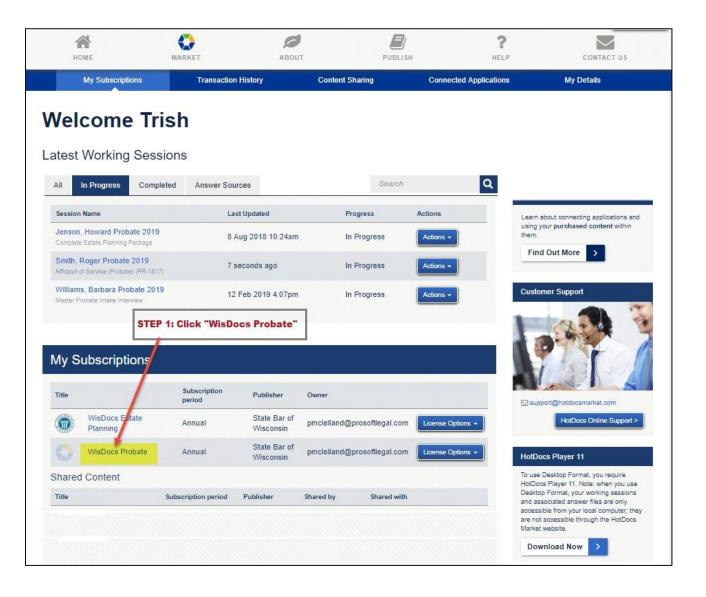
- 1. Open the PDF file in Adobe
- 2. Perform **File** Save As and save it to MS Word format
- 3. Perform any clean-up on the file and re-save

**Alternatively**, open Word, then browse for the PDF file and open it from within Word. Word will detect that this is a PDF and attempt to convert it to Word .docx format.

# Setting up a New Session

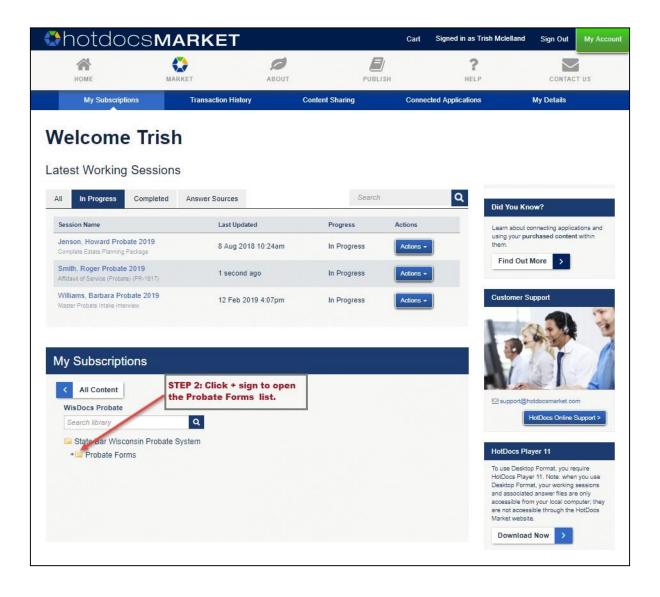
Following are eight steps to follow for creating a new session.





Under My Subscriptions, click on WisDocs Probate.



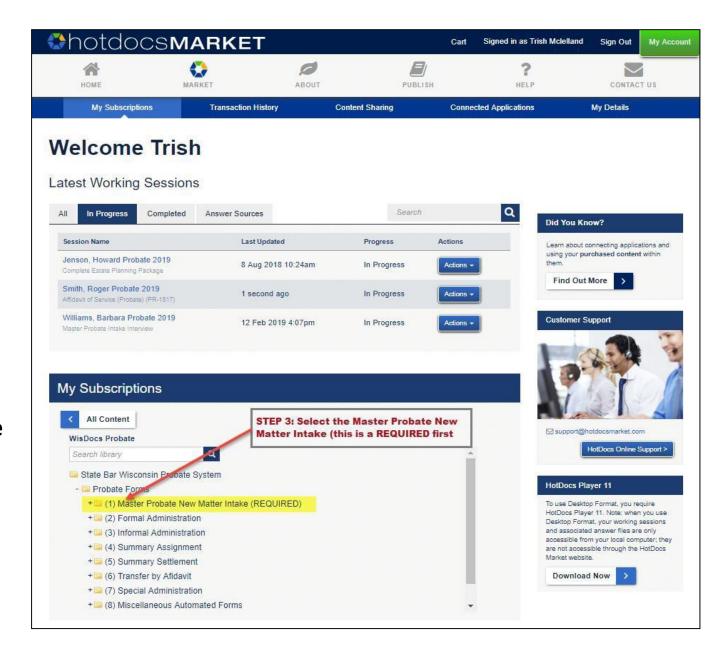


Click on **Probate Forms** to expand the list of forms tree.

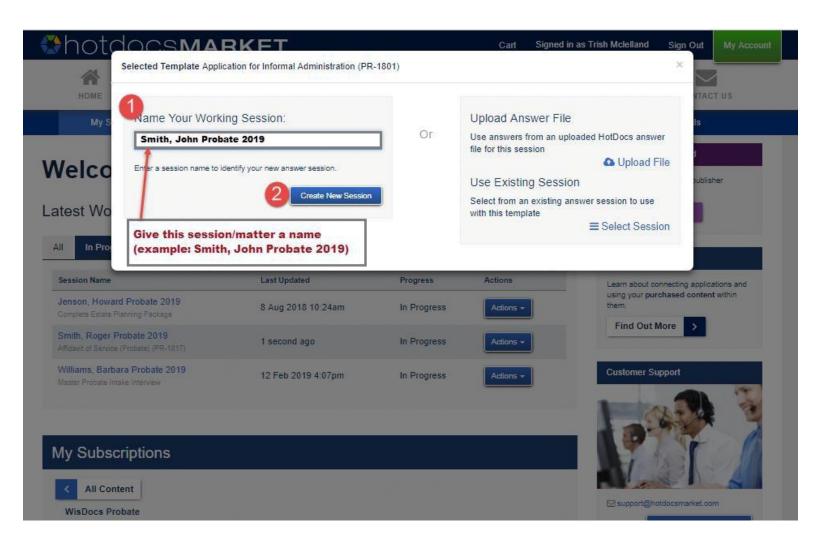


Click on **Master Probate New Matter Intake** to start.

NOTE: This Master interview does NOT generate documents. It's purpose is preliminary data gathering only

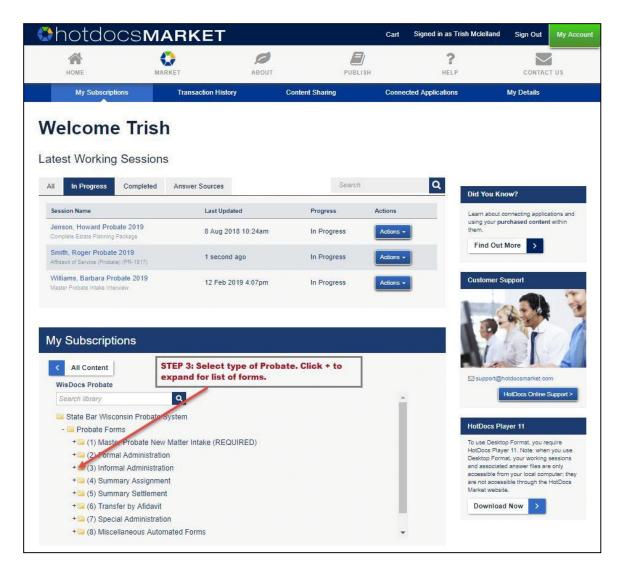


STEP 4: Name the New Session and Answer File



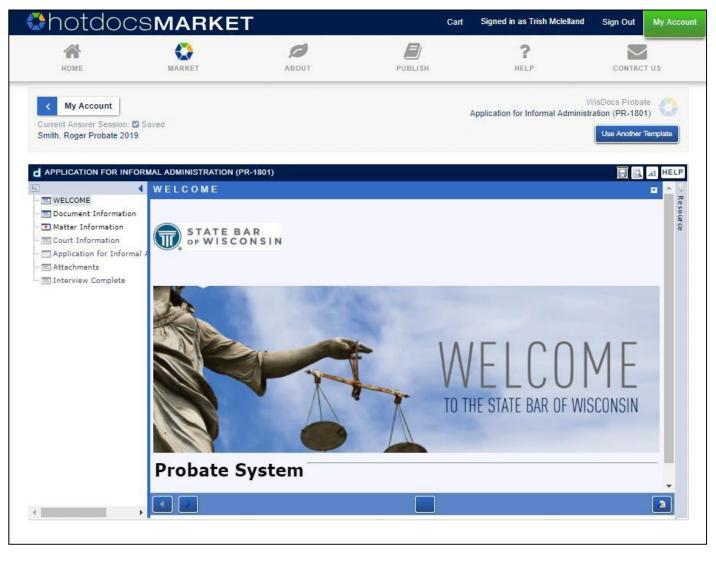
IMPORTANT!! <u>Always rename your Working Session</u>! The system automatically defaults to the name of whichever interview or document is selected. The new session should follow a standard matter naming convention of your choice, such as "Smith, John: Probate 2019"). If you forget to rename, you can edit/change it later. Click **Create New Session** when complete. Your answer file will also be created through this process.

STEP 5: Select the Probate Category



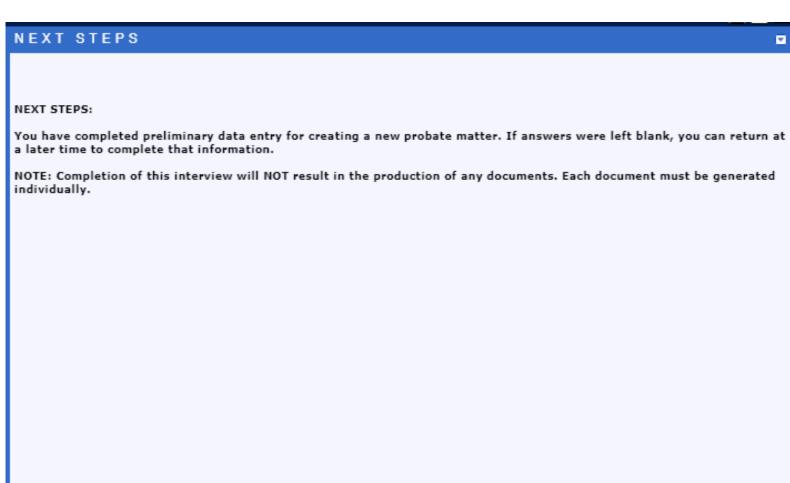
Select which type of Probate you need. You can click the + sign to expand and view each document list within the type of probate.

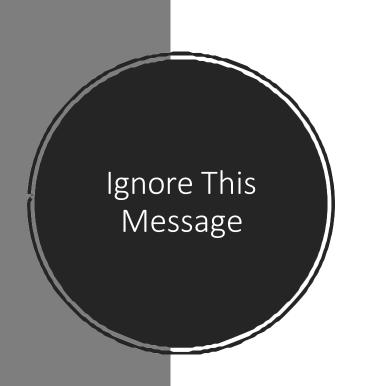
STEP 6: Answer Interview Questions



A document-specific interview will start. Answer the questions on each screen. Required fields will appear in Red. You <u>must</u> answer those before continuing.







If this message appears after creating the Master Interview session, ignore it (there are no documents to download at this time).

# ASSEMBLY SESSION COMPLETE You may download your document using the following link: Master Interview.anx IGNORE THIS MESSAGE Links will expire in about 30 minutes, or when you leave this page. Please download all of the documents you need before leaving.

### Adding Documents to a Session

As the probate matter progresses, you will be adding documents, one by one, to the session (matter). Each time you generate a new document, you must select the Session Answer File associated with that matter.

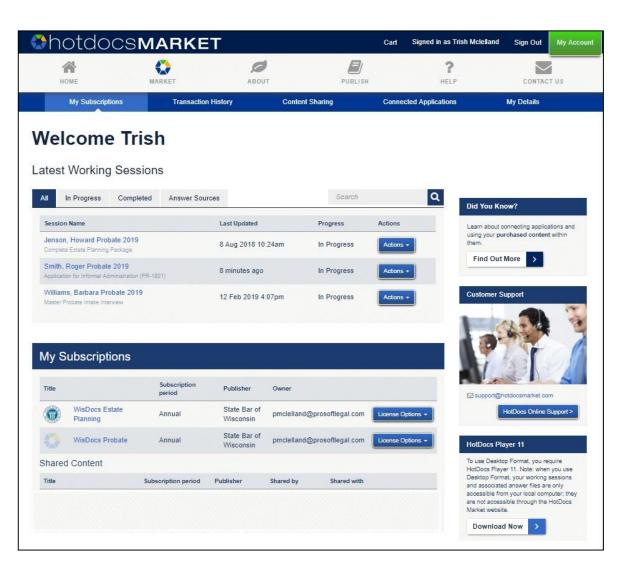
Data stored in your Session Answer File is cumulative, containing all the information entered to date. As each new document is created, those answers are added to the same Session Answer File.

The next step is to generate your first document for this session.

### Generating a Document for the Session

Following are eight steps to follow for generating a probate document.

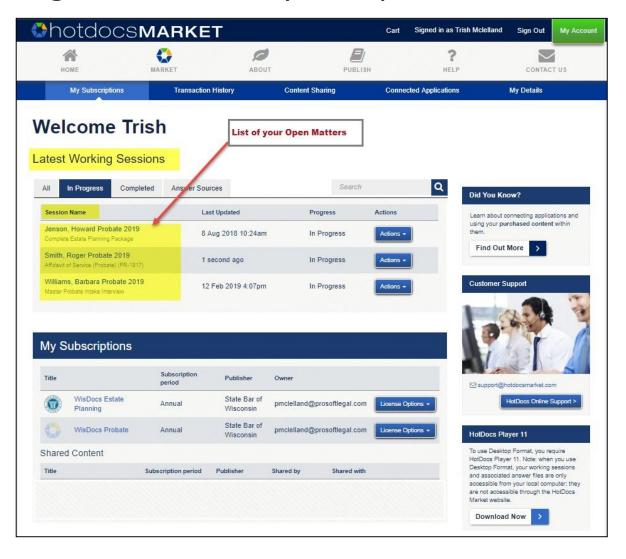




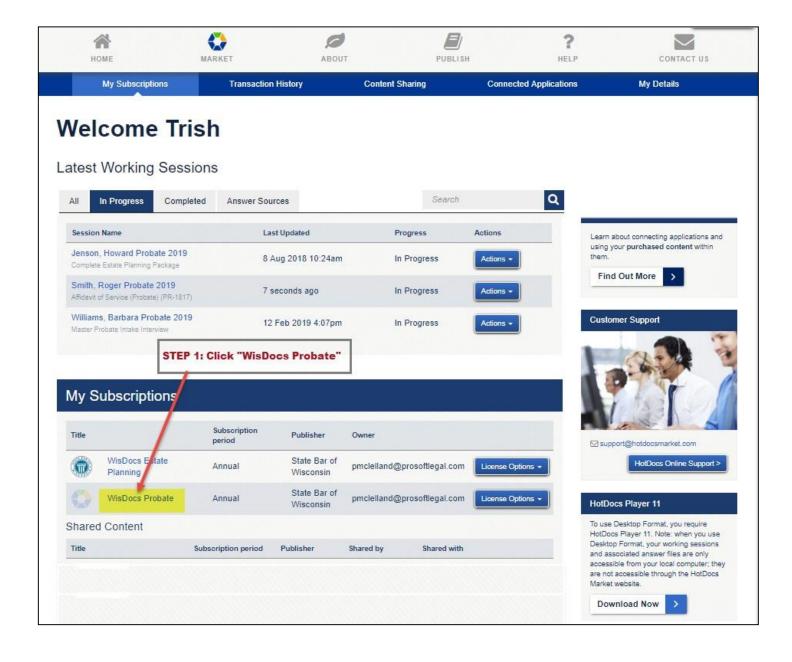
Return to the **My Account** page. To generate a document for the new session (matter), follow steps 1 thru 8 in the next section.

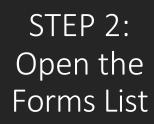
## Working Sessions

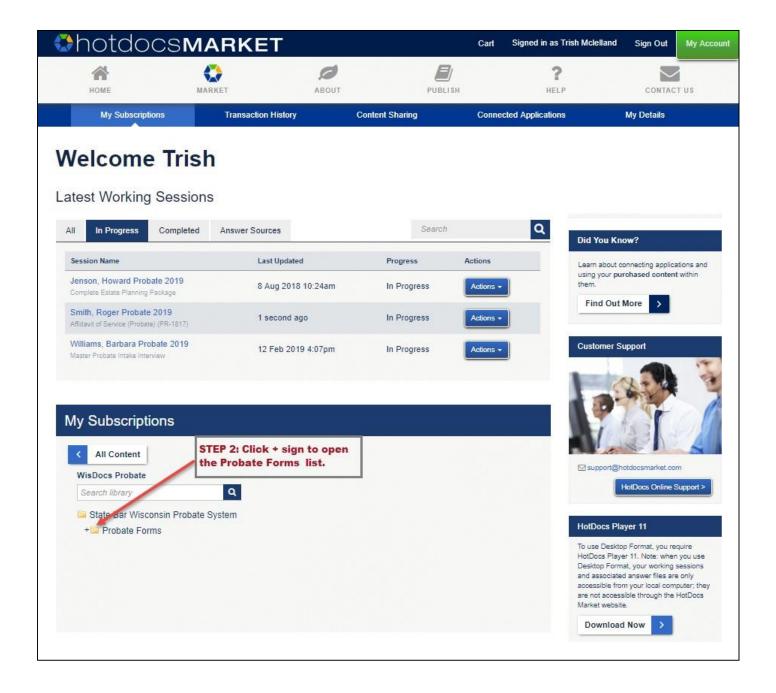
"Latest Working sessions" are your open Probate Matters.



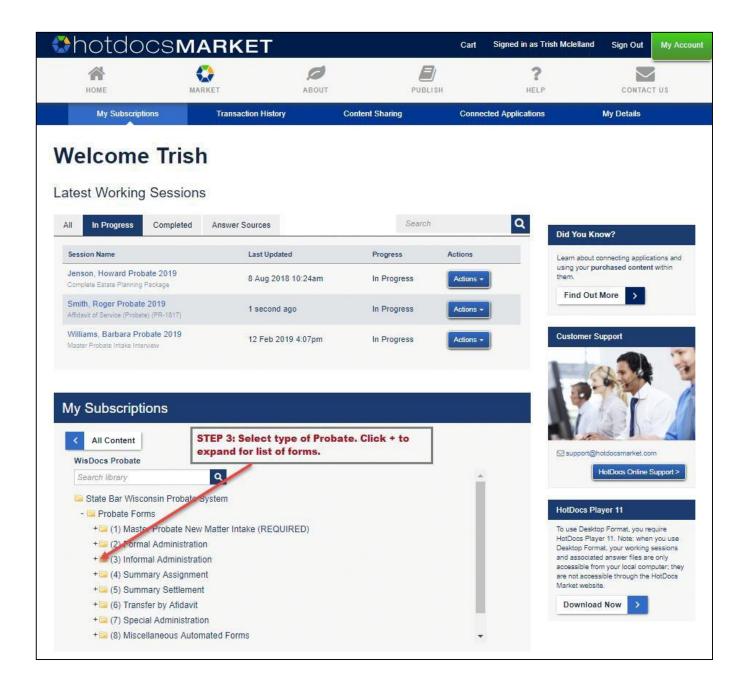
#### STEP 1: Select WisDocs Probate







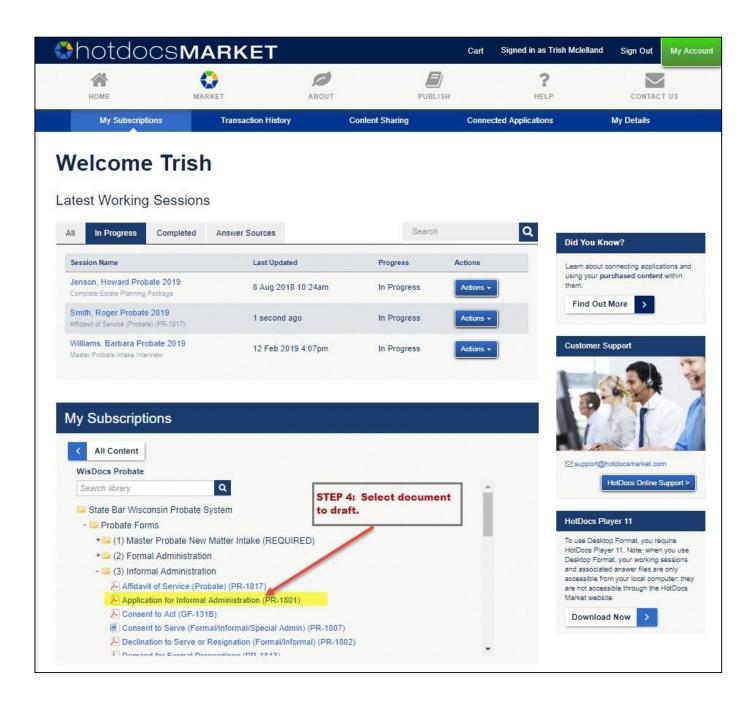
STEP 3: Select the Probate Forms Category



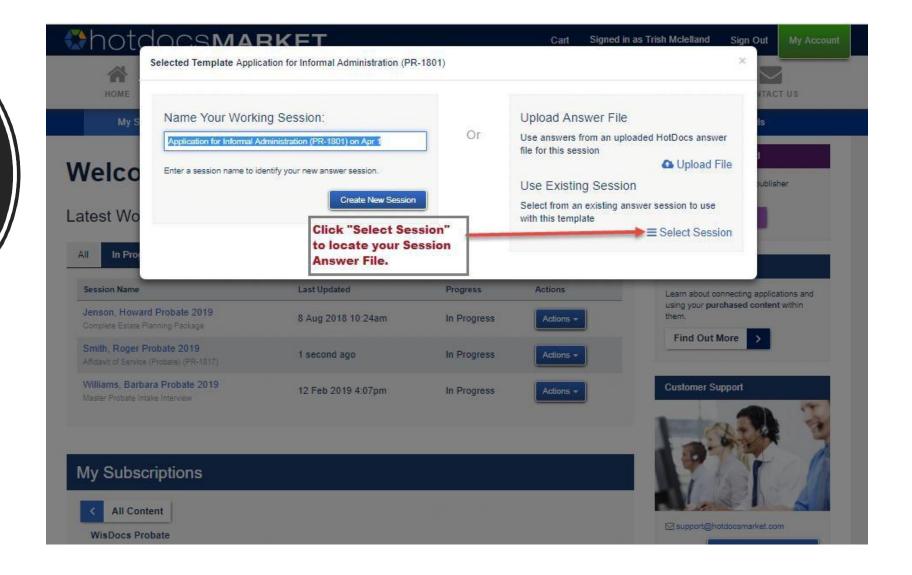


#### NOTE:

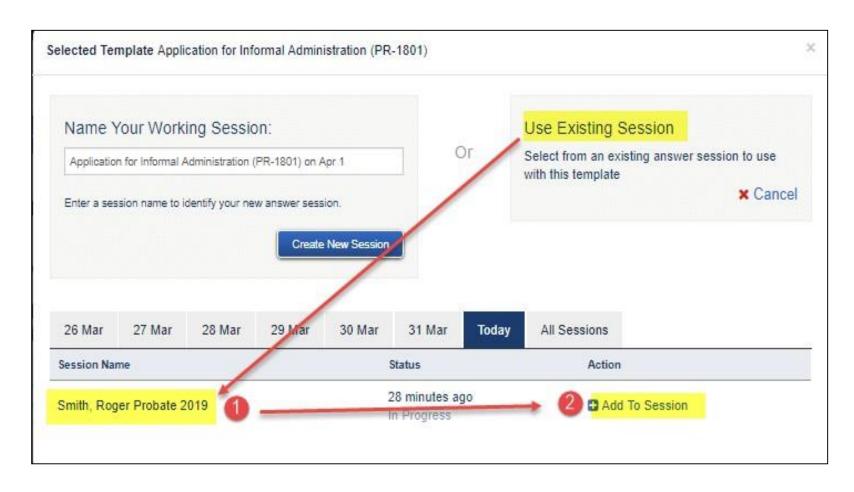
Documents are listed alphabetically within each probate type.



STEP 5: Locate the Session Answer File to use

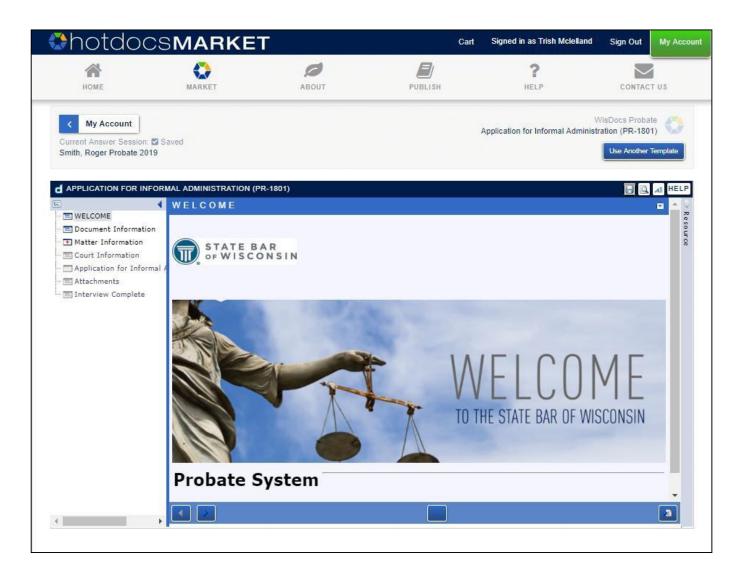


STEP 6: Select the Existing Session Answer File



Click on the session (matter) name. Then click "Add to Session". This will ensure answers for this document are saved in the Roger Smith probate session/matter.



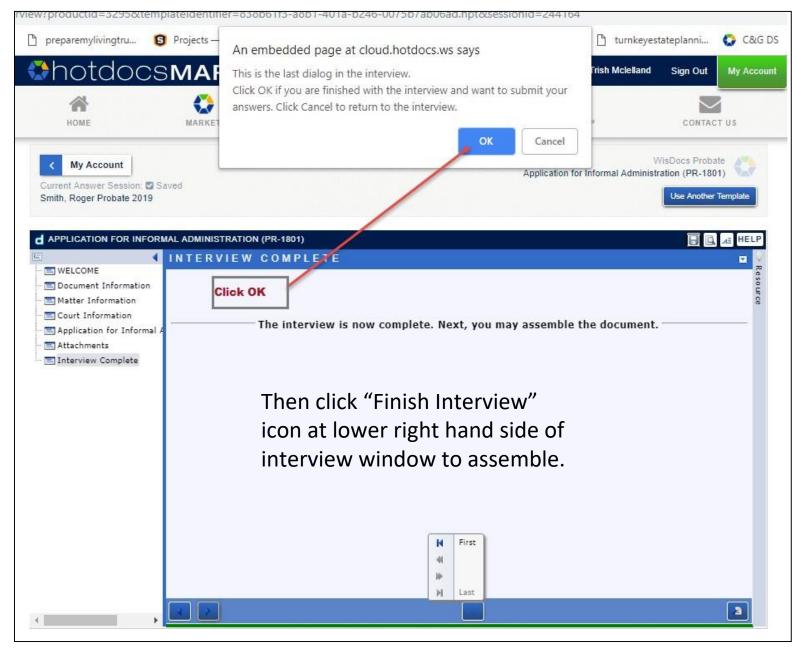


The document-specific interview will run. Answer the questions on each screen. Required fields appear in Red. You <u>must</u> answer those before continuing.

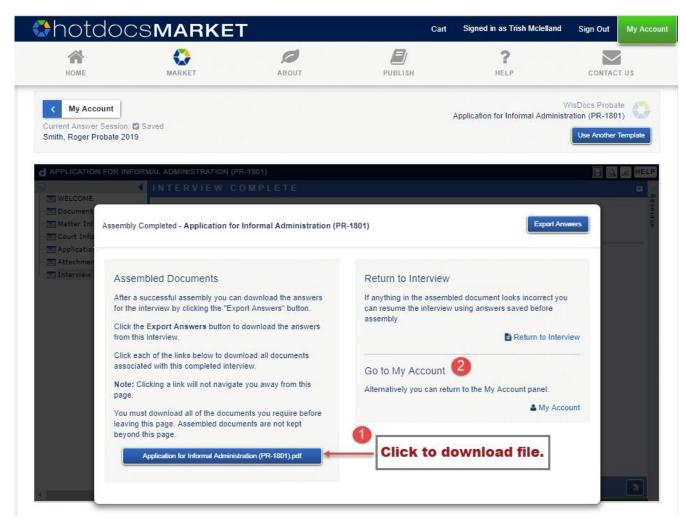


If this pop up appears, Click OK.

If there were questions left unanswered during the interview, you will also be warned here.





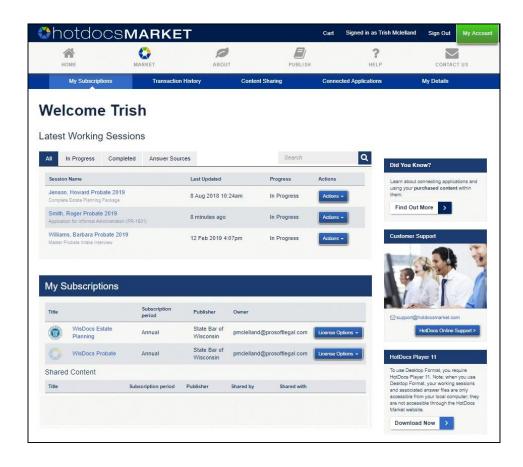


Click the assembled document name (blue button) to download file. It will generate in either PDF or Word and temporarily store it in your Downloads folder on your local C:\ drive. Navigate to your <u>Downloads</u> folder and move the file to your appropriate PC or server drive.

You may then return to My Account to continue working on the session.

#### Generating Another Document

To generate another document, return to your **My Account** page. REPEAT Steps 1-8 under **Generating a Document** in this QuickStart Guide.



## Getting Help

For technical assistance, we recommend you contact HotDocs Market Support at (800-828-8328) first.

If they determine that the issue is content related (and not a technical/platform issue) please call State Bar Customer Service at (800) 728-7788.

