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Probate Document Forms

QuickStart User Guide

Accessing your Account

1. In your web browser, visit www.hotdocsmarket.com
2. Click **Sign In** and enter your email and password
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HotDocs Market is an intelligent and comprehensive document assembly service designed for legal professionals. HotDocs Market is the premier source for accurate, cost-efficient, user-friendly forms crafted by commercial legal publishers and state bar associations.

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What are the key benefits?

A subscription to one or more of the many ready-to-use, professional legal forms products on HotDocs Market means you will spend less time creating legal documents and more time with clients. You will also enjoy the ability to use the content on any web-enabled device and the peace of mind that comes from knowing that accurate, automatic product updates are a built-in feature with every subscription.


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trish.smith@joneslawfirm.com

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If you already have an account with HotDocs Document Services, you can also use your Document Services account details to sign in.

Sign In

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.

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Welcome Trish

List of your Open Matters

Latest Working Sessions

All In Progress Completed Answer Sources Search

Session Name	Last Updated	Progress	Actions
Jenson, Howard Probate 2019 Complete Estate Planning Package	8 Aug 2018 10:24am	In Progress	Actions
Smith, Roger Probate 2019 Affidavit of Service (Probate) (PR-1817)	1 second ago	In Progress	Actions
Williams, Barbara Probate 2019 Master Probate Intake Interview	12 Feb 2019 4:07pm	In Progress	Actions

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WisDocs Probate	Annual	State Bar of Wisconsin	pmclelland@prosoftlegal.com	License Options

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Title	Subscription period	Publisher	Shared by	Shared with
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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 too 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.

STEP 1: Open Subscription

The screenshot shows the HotDocs Market user interface. At the top, there is a navigation bar with icons for HOME, MARKET, ABOUT, PUBLISH, HELP, and CONTACT US. Below this is a secondary navigation bar with links for My Subscriptions, Transaction History, Content Sharing, Connected Applications, and My Details. The main content area is titled 'Welcome Trish' and 'Latest Working Sessions'. It features a table with columns for Session Name, Last Updated, Progress, and Actions. Below this table, a red box with the text 'STEP 1: Click "WisDocs Probate"' has a red arrow pointing to the 'WisDocs Probate' subscription in the 'My Subscriptions' section. The 'My Subscriptions' section has a table with columns for Title, Subscription period, Publisher, and Owner. The 'WisDocs Probate' subscription is highlighted in yellow. Below this is a 'Shared Content' section with a table for Title, Subscription period, Publisher, Shared by, and Shared with. On the right side, there are three panels: 'Find Out More' with a button, 'Customer Support' with a photo of support staff and a button, and 'HotDocs Player 11' with a 'Download Now' button.

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Latest Working Sessions

All In Progress Completed Answer Sources Search

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STEP 1: Click "WisDocs Probate"

My Subscriptions

Title	Subscription period	Publisher	Owner
WisDocs Estate Planning	Annual	State Bar of Wisconsin	pmclelland@prosoftlegal.com
WisDocs Probate	Annual	State Bar of Wisconsin	pmclelland@prosoftlegal.com

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Under **My Subscriptions**, click on **WisDocs Probate**.

STEP 2: Open Forms List

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WisDocs Probate

Search library

State Bar Wisconsin Probate System

+ Probate Forms

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

STEP 3: Select Master Probate Interview

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

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WisDocs Probate

State Bar Wisconsin Probate System

Probate Forms

(1) Master Probate New Matter Intake (REQUIRED)

(2) Formal Administration

(3) Informal Administration

(4) Summary Assignment

(5) Summary Settlement

(6) Transfer by Affidavit

(7) Special Administration

(8) Miscellaneous Automated Forms

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STEP 3: Select the Master Probate New Matter Intake (this is a REQUIRED first

STEP 4: Name the New Session and Answer File

Selected Template Application for Informal Administration (PR-1801)

1 Name Your Working Session:

Smith, John Probate 2019

Enter a session name to identify your new answer session.

2 Create New Session

Give this session/matter a name
(example: Smith, John Probate 2019)

Or

Upload Answer File

Use answers from an uploaded HotDocs answer file for this session

Upload File

Use Existing Session

Select from an existing answer session to use with this template

Select Session

Session Name	Last Updated	Progress	Actions
Jenson, Howard Probate 2019 Complete Estate Planning Package	8 Aug 2018 10:24am	In Progress	Actions
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IMPORTANT!! Always rename your Working Session! 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

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STEP 3: Select type of Probate. Click + to expand for list of forms.

WisDocs Probate

State Bar Wisconsin Probate System

Probate Forms

(1) Master Probate New Matter Intake (REQUIRED)

(2) Formal Administration

(3) Informal Administration

(4) Summary Assignment

(5) Summary Settlement

(6) Transfer by Affidavit

(7) Special Administration

(8) Miscellaneous Automated Forms

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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

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Current Answer Session: ☒ Saved
Smith, Roger Probate 2019

WisDocs Probate
Application for Informal Administration (PR-1801)
[Use Another Template](#)

APPLICATION FOR INFORMAL ADMINISTRATION (PR-1801)

WELCOME

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WELCOME
TO THE STATE BAR OF WISCONSIN

Probate System

WELCOME
Document Information
Matter Information
Court Information
Application for Informal Administration
Attachments
Interview Complete

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

End of
Interview

NEXT STEPS

NEXT STEPS:

You have completed preliminary data entry for creating a new probate matter. If answers were left blank, you can return at a later time to complete that information.


NOTE: Completion of this interview will NOT result in the production of any documents. Each document must be generated individually.

Ignore This
Message

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.

Generating a Document

The screenshot displays the HotDocs Market user interface. At the top, the navigation bar includes the HotDocs Market logo, a cart icon, and user information: 'Signed in as Trish Mclelland' with links for 'Sign Out' and 'My Account'. Below this is a secondary navigation bar with icons and labels for 'HOME', 'MARKET', 'ABOUT', 'PUBLISH', 'HELP', and 'CONTACT US'. A third navigation bar contains links for 'My Subscriptions', 'Transaction History', 'Content Sharing', 'Connected Applications', and 'My Details'. The main content area is titled 'Welcome Trish' and 'Latest Working Sessions'. It features a table with columns for 'Session Name', 'Last Updated', 'Progress', and 'Actions'. The table lists three sessions: 'Jenson, Howard Probate 2019', 'Smith, Roger Probate 2019', and 'Williams, Barbara Probate 2019'. To the right of the table is a 'Did You Know?' section with a 'Find Out More' button. Below the table is a 'My Subscriptions' section with a table listing two subscriptions: 'WisDocs Estate Planning' and 'WisDocs Probate'. Below this is a 'Shared Content' section with a table that is currently empty. On the right side of the page, there is a 'Customer Support' section with a 'HotDocs Online Support' button and a 'HotDocs Player 11' section with a 'Download Now' button.

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Williams, Barbara Probate 2019 Master Probate Intake Interview	12 Feb 2019 4:07pm	In Progress	Actions

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WisDocs Estate Planning	Annual	State Bar of Wisconsin	pmclelland@prosoftlegal.com	License Options
WisDocs Probate	Annual	State Bar of Wisconsin	pmclelland@prosoftlegal.com	License Options

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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.

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The main content area is titled 'Welcome Trish'. Below this, the 'Latest Working Sessions' section is highlighted with a yellow background. It features a table with columns for Session Name, Last Updated, Progress, and Actions. A red arrow points from a text box labeled 'List of your Open Matters' to the first session entry in the table.

Session Name	Last Updated	Progress	Actions
Jenson, Howard Probate 2019 Complete Estate Planning Package	8 Aug 2018 10:24am	In Progress	Actions ▾
Smith, Roger Probate 2019 Affidavit of Service (Probate) (PR-1817)	1 second ago	In Progress	Actions ▾
Williams, Barbara Probate 2019 Master Probate Intake Interview	12 Feb 2019 4:07pm	In Progress	Actions ▾

Below the 'Latest Working Sessions' section is the 'My Subscriptions' section, which displays a table of active subscriptions. The table has columns for Title, Subscription period, Publisher, and Owner. Two subscriptions are listed: 'WisDocs Estate Planning' and 'WisDocs Probate', both with an Annual subscription period and published by the State Bar of Wisconsin.

Title	Subscription period	Publisher	Owner
WisDocs Estate Planning	Annual	State Bar of Wisconsin	pmclelland@prosoftlegal.com
WisDocs Probate	Annual	State Bar of Wisconsin	pmclelland@prosoftlegal.com

At the bottom of the main content area is the 'Shared Content' section, which is currently empty. On the right side of the interface, there are three sidebar sections: 'Did You Know?' with a link to 'Find Out More', 'Customer Support' with a link to 'HotDocs Online Support', and 'HotDocs Player 11' with a link to 'Download Now'.

STEP 1: Select WisDocs Probate

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STEP 2: Open the Forms List

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Q

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1 second ago

In Progress

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Probate Forms

(1) Master Probate New Matter Intake (REQUIRED)

(2) Formal Administration

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Step 4: Select
the
Document to
Draft

NOTE:
Documents are
listed
alphabetically
within each
probate type.

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In Progress

Actions

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1 second ago

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Affidavit of Service (Probate) (PR-1817)

Application for Informal Administration (PR-1801)

Consent to Act (GF-131B)

Consent to Serve (Formal/Informal/Special Admin) (PR-1807)

Declination to Serve or Resignation (Formal/Informal) (PR-1802)


Demand for Formal Proceedings (PR-1812)

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STEP 4: Select document to draft.

STEP 5:
Locate the
Session
Answer File
to use

hotdocsMARKET

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HOME

My S

Welcome

Latest Wo

All In Pro

Session Name Last Updated Progress Actions

Jenson, Howard Probate 2019 Complete Estate Planning Package	8 Aug 2018 10:24am	In Progress	Actions
Smith, Roger Probate 2019 Affidavit of Service (Probate) (PR-1817)	1 second ago	In Progress	Actions
Williams, Barbara Probate 2019 Master Probate Intake Interview	12 Feb 2019 4:07pm	In Progress	Actions

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WisDocs Probate

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support@hotdocsmarket.com

Selected Template Application for Informal Administration (PR-1801)

Name Your Working Session:

Application for Informal Administration (PR-1801) on Apr 1

Enter a session name to identify your new answer session.

Create New Session

Or

Upload Answer File

Use answers from an uploaded HotDocs answer file for this session

Upload File

Use Existing Session

Select from an existing answer session to use with this template

Select Session

Click "Select Session" to locate your Session Answer File.

STEP 6:
Select the
Existing
Session
Answer File

Selected Template Application for Informal Administration (PR-1801)

Name Your Working Session:

Application for Informal Administration (PR-1801) on Apr 1

Enter a session name to identify your new answer session.

Create New Session

Or

Use Existing Session

Select from an existing answer session to use with this template

Cancel

26 Mar	27 Mar	28 Mar	29 Mar	30 Mar	31 Mar	Today	All Sessions
Session Name	Status	Action					
Smith, Roger Probate 2019	28 minutes ago In Progress	Add To Session					

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.

STEP 7: Answer Interview Questions

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Current Answer Session: ☒ Saved
Smith, Roger Probate 2019

WisDocs Probate
Application for Informal Administration (PR-1801)
Use Another Template

d APPLICATION FOR INFORMAL ADMINISTRATION (PR-1801)

WELCOME

- WELCOME
- Document Information
- Matter Information
- Court Information
- Application for Informal Administration
- Attachments
- Interview Complete

STATE BAR OF WISCONSIN

WELCOME
TO THE STATE BAR OF WISCONSIN

Probate System

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

End of Interview

If this pop up appears, Click OK.

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

The screenshot displays the hotdocsMAF web application. At the top, a navigation bar includes links for HOME, MARKET, and My Account. A modal dialog box is centered on the screen, containing the text: "An embedded page at cloud.hotdocs.ws says This is the last dialog in the interview. Click OK if you are finished with the interview and want to submit your answers. Click Cancel to return to the interview." Below the dialog, the main content area shows the "APPLICATION FOR INFORMAL ADMINISTRATION (PR-1801)" interface. The left sidebar lists navigation items: WELCOME, Document Information, Matter Information, Court Information, Application for Informal A, Attachments, and Interview Complete. The main panel is titled "INTERVIEW COMPLETE" and contains the message: "The interview is now complete. Next, you may assemble the document." A red box highlights the text "Click OK" in the main panel, with a red arrow pointing from the "OK" button in the dialog box to it. At the bottom right of the main panel, there are navigation controls labeled "First" and "Last".

Then click "Finish Interview" icon at lower right hand side of interview window to assemble.

STEP 8: Download and Save Document

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My Account

Current Answer Session: ☒ Saved
Smith, Roger Probate 2019

WisDocs Probate
Application for Informal Administration (PR-1801)
Use Another Template

APPLICATION FOR INFORMAL ADMINISTRATION (PR-1801)

WELCOME

Document
Matter Info
Court Info
Application
Attachment
Interview

INTERVIEW COMPLETE

Assembly Completed - Application for Informal Administration (PR-1801)

Export Answers

Assembled Documents

After a successful assembly you can download the answers for the interview by clicking the "Export Answers" button.

Click the Export Answers button to download the answers from this interview.

Click each of the links below to download all documents associated with this completed interview.

Note: Clicking a link will not navigate you away from this page.

You must download all of the documents you require before leaving this page. Assembled documents are not kept beyond this page.

Return to Interview

If anything in the assembled document looks incorrect you can resume the interview using answers saved before assembly.

Return to Interview

Go to My Account 2

Alternatively you can return to the My Account panel.

My Account

1

Click to download file.

Application for Informal Administration (PR-1801).pdf

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 Downloads 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.

The screenshot shows the 'My Account' page on the HotDocs Market website. The user is signed in as Trish Mclelland. The page features a navigation bar with links to Home, Market, About, Publish, Help, and Contact Us. Below this is a sub-navigation bar with links to My Subscriptions, Transaction History, Content Sharing, Connected Applications, and My Details. The main content area is titled 'Welcome Trish' and includes a section for 'Latest Working Sessions' with a table of active sessions. Below this is a 'My Subscriptions' section with a table of active subscriptions. At the bottom, there is a 'Shared Content' section. On the right side, there are three sidebar widgets: 'Did You Know?' with a link to 'Find Out More', 'Customer Support' with a link to 'HotDocs Online Support', and 'HotDocs Player 11' with a 'Download Now' button.

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Welcome Trish

Latest Working Sessions

All In Progress Completed Answer Sources Search

Session Name	Last Updated	Progress	Actions
Jenson, Howard Probate 2019 Complete Estate Planning Package	8 Aug 2018 10:24am	In Progress	Actions
Smith, Roger Probate 2019 Application for Informal Administration (PR-1801)	8 minutes ago	In Progress	Actions
Williams, Barbara Probate 2019 Master Probate Intake Interview	12 Feb 2019 4:07pm	In Progress	Actions

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Title	Subscription period	Publisher	Owner	
WisDocs Estate Planning	Annual	State Bar of Wisconsin	pmclelland@prosofflegal.com	License Options
WisDocs Probate	Annual	State Bar of Wisconsin	pmclelland@prosofflegal.com	License Options

Shared Content

Title	Subscription period	Publisher	Shared by	Shared with
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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.



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