Tentative Document Assembly Schedule (may be revised based on objectives of students) – Summer 2018

Unit 1 Introduction to Course – May 28

- Review Course
- End Goal—
    - Master HotDocs Developer
    - Use document assembly software to design estate planning system
- Sources for Documents
- Mastery of MS Word (see video at http://umkclaw.link/lpt-trustdoc and first day assignment
    - Styles
    - Paragraph numbering or outlining
    - No indent paragraph style
    - Cross referencing
    - Tables of Contents
    - Page numbering
    - Format Painter
    - Show ¶
- Difference between HotDocs Developer and Automator
- Complete revision of "Stripped Trust" through Section 3.03 of *Trust* (doing some cross-references, as well as automatic Table of Contents), *Trust* signing clause, *Schedule A*, and *Information Sheet.*

Unit 2 Introduction to HotDocs – May 30, June 4

a. Tutorial Overview

b. Tutorial Lessons 1 – Assemble a Document

   i. Text templates
   ii. Assembly
   iii. Dialogues
   iv. End of Interview
   v. Preview Document

c. Tutorial Lesson 2 - Create a New Template Library

   i. Learn basic files comprising HotDocs Developer

      1. .hdl – HotDocs Library
      2. .docx – Word Docx Template
      3. .cmp HotDocs Component or Interview File
      4. .anx – HotDoxs Answer file
      5. .docx – Word Docx output document file

   ii. Watch for the default folder
   iii. Creating a new library
   iv. Adding a new template to the library

d. Tutorial Lesson 3 – Create a New Template
    i. Component files
    ii. Familiarize with toolbar
    iii. Use save on HotDocs toolbar

e. Tutorial Lesson 4 – Replace Text and Dates with Variables

    i. Text Variables
    ii. Date Variables
    iii. Testing
    iv. Arrange button
    v. Editing Component Button to find a Prompt box to create questions
    vi. Field Height
    vii. Date formats—This instance v. every instance (must use edit component button)
    viii. Clearing "warn when unanswered"
    ix. Unanswered text box under "advanced properties"

Unit 3 More Basic Tutorials –June 6

a. Tutorial Lesson 5 -- Replace Numbers
    i. Social Security numbers, telephone numbers and times of day are text with patterns
    ii. Number Format drop-down
    iii. Currency symbol and decimal places under Edit Component
    iv. Computation Variable
b. Tutorial Lesson 6—Replace Multiple Choice Text
    i. Options and Merge Text
    ii. Pronoun references
    iii. Edit from Variable Field Box (by deselecting "use default") to affect only one instances of pronoun (as opposed to editing from component properties)
    iv. Note use of Merge Text Pronoun sets
c. Tutorial Lesson 7—Create Computation Variables
    i. Instruction Key words ("INSERT")
    ii. Expression Key words ("DATE + NUM MONTHS")
    iii. Operators
    iv. Value (user's answer to a variable)
    v. Computation Editor and Script box
    vi. DATE OF (NUM, NUM, NUM)
    vii. MONTH OF (DATE)
    viii. + NUM OF MONTHS
    ix. YEAR OF
d. Tutorial Lesson 8--Make Paragraphs Conditional
    i. IF
    ii. ELSE IF
    iii. ELSE
    iv. IF True/False Variable
    v. Extra Returns
    vi. Multiple Choice variables and IF Expression

vii. Button Grids
viii. Crtl+Spacebar for list of scripting options

Unit 4 Group Variables, Scripts, Dialogs, and Computations – June 11

a. Tutorial Lesson 9—Test Assemble the Document
   i. New Answers button

b. Tutorial Lesson 10—Group Variables into Dialogs
   i. P. 84 table, row 1, cell 1 should read "Job Information" instead of being blank
   ii. Variables are displayed within the context of their Dialog
   iii. Component Manager
   iv. Arrange Windows
   v. Dialog Editor
   vi. New Component button
   vii. Selection grouping for True/False Variables using Options tab
   viii. Create New Dialog Element button
      1. Vertical Spacing
      2. Horizontal Spacing

c. Tutorial Lesson 11—Create Scripts for Dialogs
   i. Conditionally enabling variables in dialogs
   ii. Script tab (Edit Component)
   iii. GRAY/UNGRAY instruction
   iv. F5 key
   v. HIDE/SHOW instruction

d. Tutorial Lesson 12—Use a Computation to Combine Multiple Answers into a Single Answer
   i. Advantages of keeping names separate
   ii. Clearing the "Warn when unanswered"
   iii. IF Expression and ANSWERED EXPRESSION(Middle Initial)
   iv. Extra Paragraph returns
   v. Employee First Name + " " + SPACE(Employee Middle Initial) + Employee Last Name

Unit 5 Finish Basic Tutorials – June 13

a. Tutorial Lesson 13—Copy Components between Component Files
   i. Expand button in Component Manager
   ii. states.cmp

b. Tutorial Lesson 14—Change the Placement of Variables in the Dialog
   i. Edit Component Layout tab
   ii. Right clicking to change width

c. Tutorial Lesson 15—Create Lists of Answers
   i. REPEAT Instruction
   ii. REPEAT Dialog
   iii. REPEAT Series

iv. Sort by
v. Add Another button
vi. Format drop down
vii. Filtering
viii. !=

d. Tutorial Lesson 16—Use a Table to Display a List of Answers
   i. Style as Repeated Series
   ii. In a table row, remove END REPEAT instruction

e. Tutorial Lesson 17—Create Lists within a List
   i. Nesting dialog components to mirror template
   ii. Use of style: Spreadsheet on Parent

Unit 6 The Trouble with Names – June 18

a. Review the handout, *How to deal with client names in intake forms using HotDocs*. Available at http://umkclaw.link/g.
b. **Extra help:** The instructor's lecture is also available as a video at http://umkclaw.link/intakeform.
c. **Simulation:** You are assigned to produce your own client intake file that can handle complex names like *John D. Smith, III, MD*. You need to automate a client intake template that can account for:

   1. Client's first name, middle initial or name, last name
   2. Name suffixes like "Jr."
   3. Professional suffixes like "Ph.D."
   4. Gender
   5. Salutation Prefix (eg. "Ms." or "Dr.")
   6. Intake Date
   7. Contact information
   8. Marital status
      a. Spouse name
      b. Spouse gender
      c. Is it a joint representation
   9. Conflicts check checkoff for when it is done (with date and by whom)
   10. Conflicts check necessary info (like aliases, interests in businesses, prior litigation)

d. Review handout, *Tips and Tricks*, available at http://umkclaw.link/lpt-tips.

Unit 7 Familiarize with Trust and Will and Prepare Templates – June 20

a. Trust instrument
b. Pour-over wills
c. Use version available at http://umkclaw.link/lpt-trust4.
d. Read handout, "Successor Trustee, Personal Representatives and Guardian Clauses" at http://umkclaw.link/lpt-suc-tee.

e. **Simulation:** begin automating trust and will
f. A video of Professor's reviewing the trust and related documents (same as in class) is available at https://tinyurl.com/trust-presentation.

Unit 8 Finish Trust – June 25, June 27, July 2, July 9

a. **Simulation:** Continue and hopefully finish trust and will automation

If you finish early with the above, you may do any of the following units.

Optional Unit -- Learn to Create Menus

a. Read handout, "Using Dialogs," available at http://umkclaw.link/da-dialogs.
b. Read handout, "Instructions for Creating a Menu", available at http://umkclaw.link/lpt-menu.
c. Read "ASSEMBLE FILENAME" in Help (home > Using HotDocs Scripting > Using Instruction Models > ASSEMBLE "FILENAME")
d. **Simulation:** Create menus for trust and client intake

Optional Unit -- More about Dialogs– June 21

a. Read "Control when Your Dialogs Appear" from Help (Home > Using Dialogs > Using ASK Instructions to Control Dialog Order > Control When Your Dialogs Appear)
b. Read "Put Ask Instructions in a Computation Variable" from Help (Home > Using Dialogs > Using ASK Instructions to Control Dialog Order > Put ASK Instructions in a Computation Variable)
c. Read "Defining a Custom Interview Component" from (Home > Defining Interviews and Interview Templates > Defining a Custom Interview Component)

Optional Unit – HotDocs Automater (PDFs)

a. Do Chapter 2 in the Tutorial.

July 11 – No Class