TXdocs

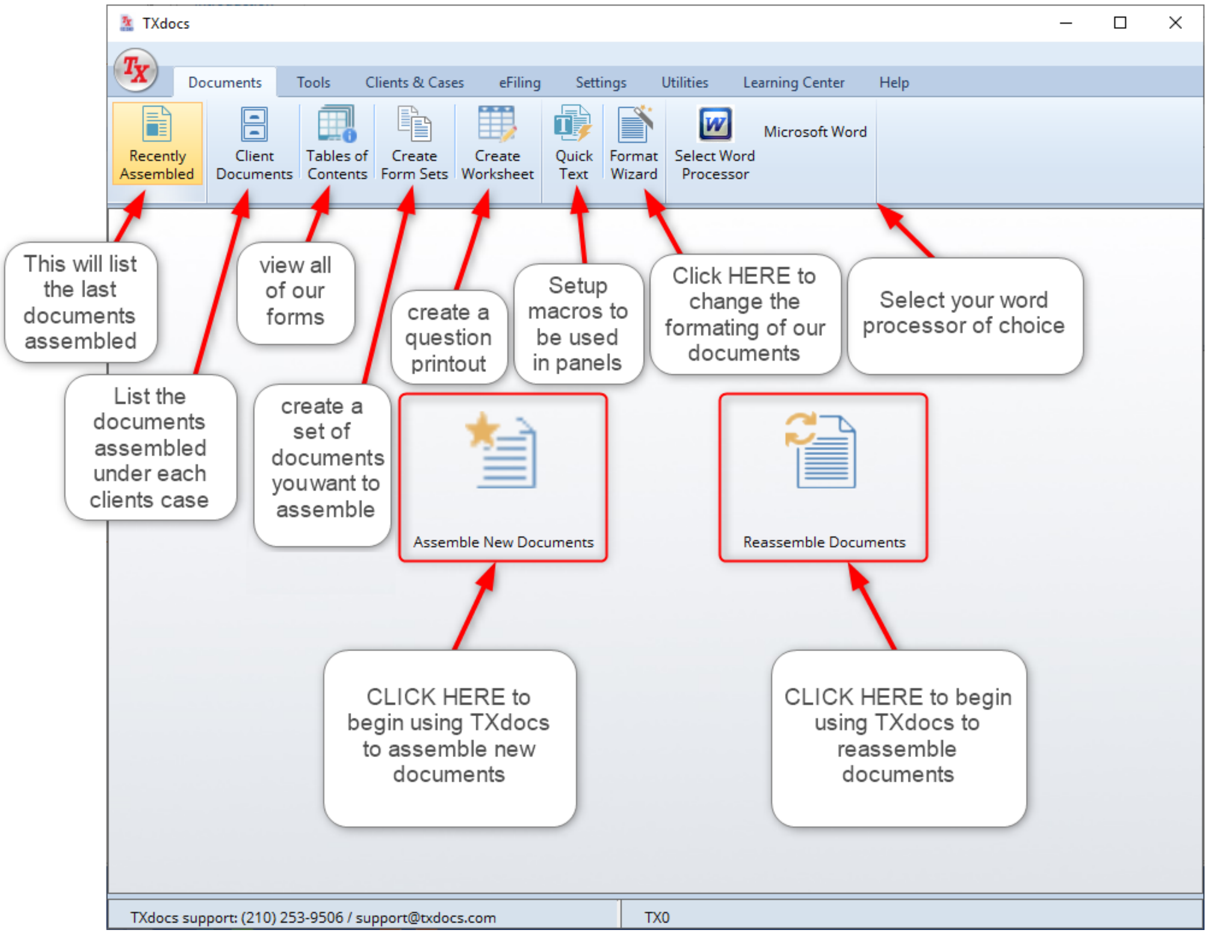
USER MANUAL

Schoolcraft Legal Systems, Inc.

Introduction

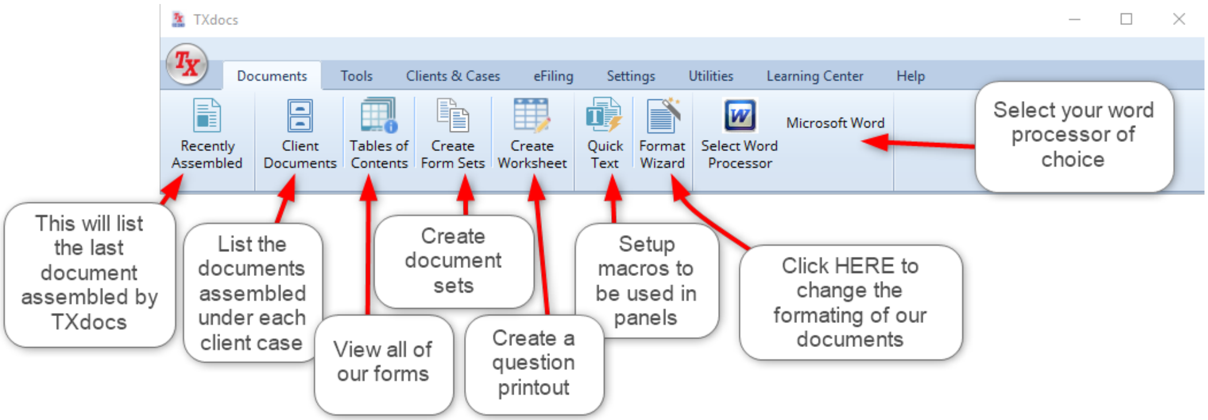
1 Introduction

TXdocs Version 2.2 offers a modern well organized interface that makes it easy to find and use the comprehensive set of features that are included in your TXdocs subscription.



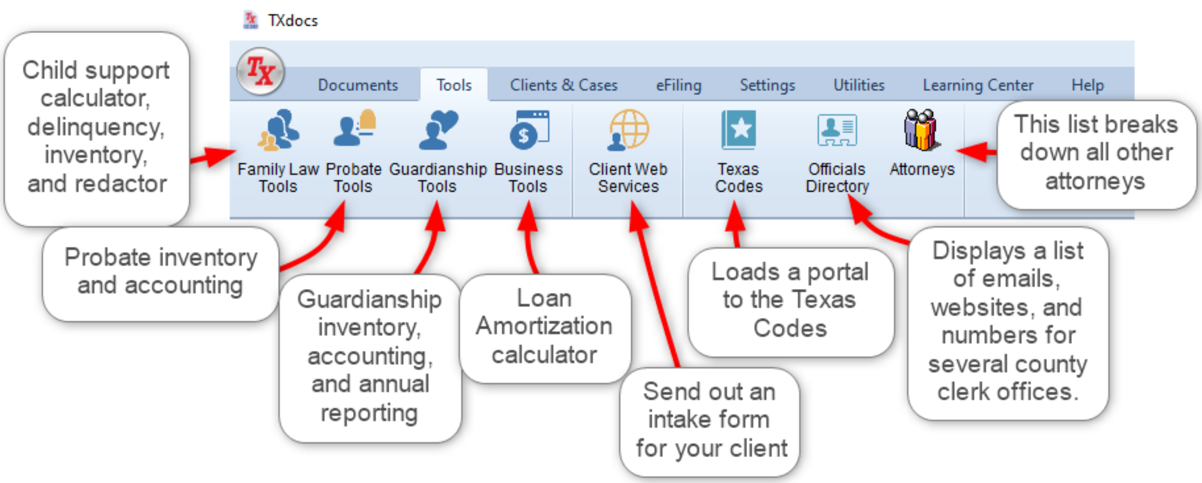
TXdocs is organized in 7 major categories:
(1.)Documents
(2.)Tools
(3.)Clients & Cases
(4.)eFiling (coming in the Fall of 2020)
(5.)Settings
(6.)Utilities
(7.)Learning Center
Each category can be selected by clicking the appropriate tab at the top of the ribbon bar

DOCUMENTS TAB



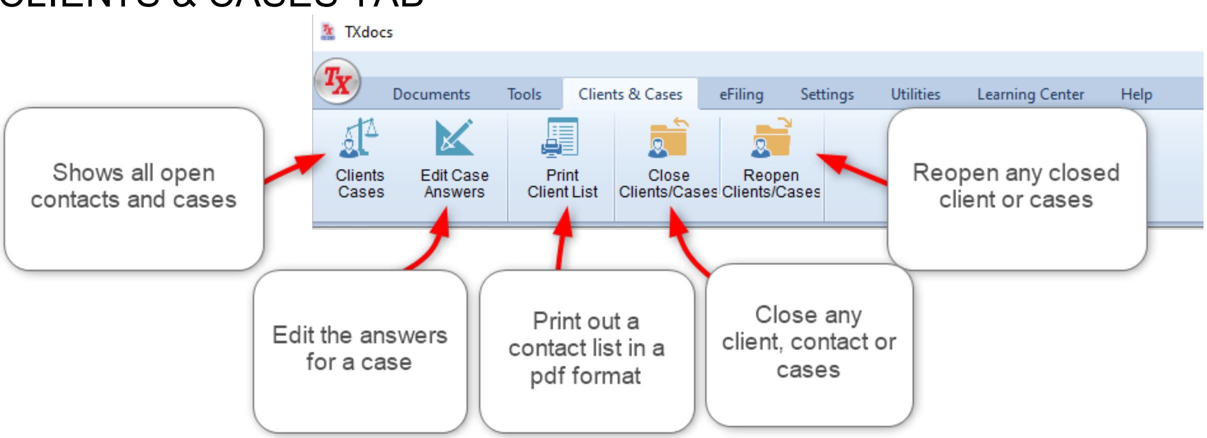
Documents Tab information

TOOLS TAB



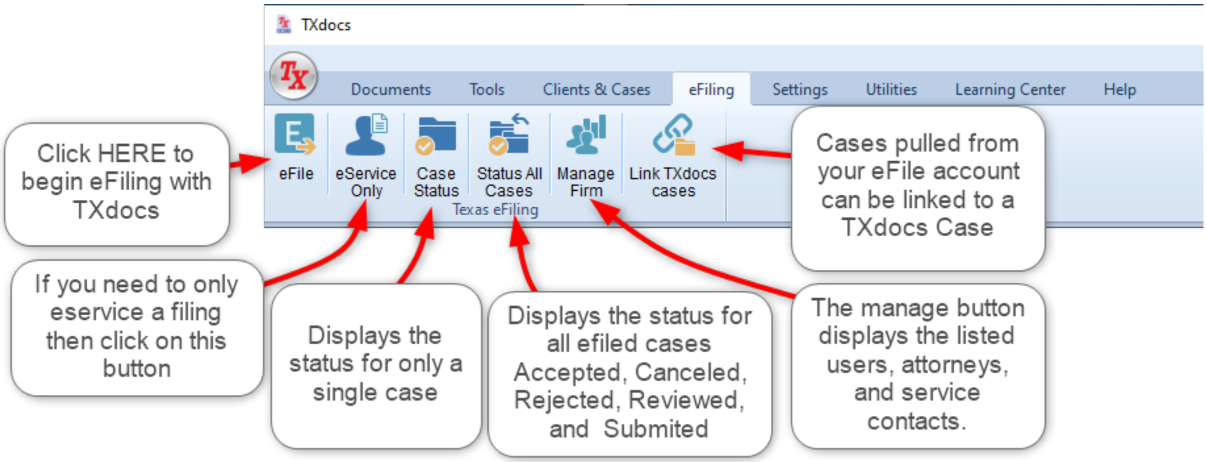
Tools Tab information

CLIENTS & CASES TAB



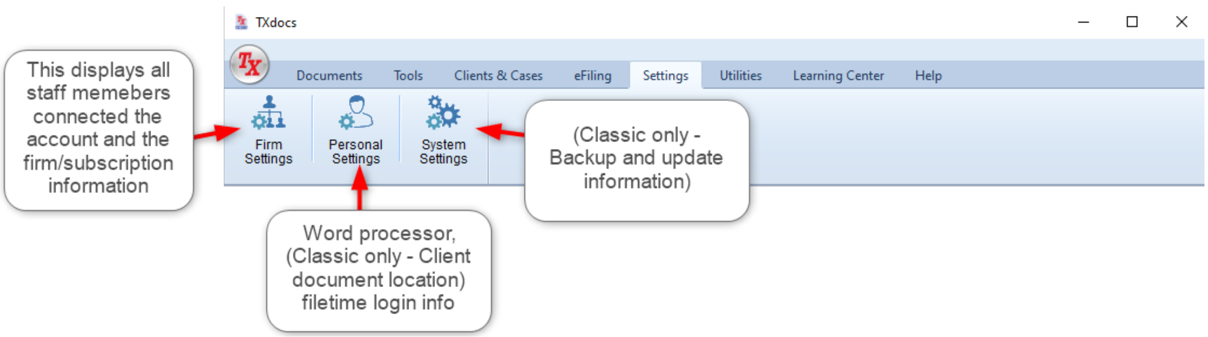
Clients & Cases Tab information

EFILING TAB



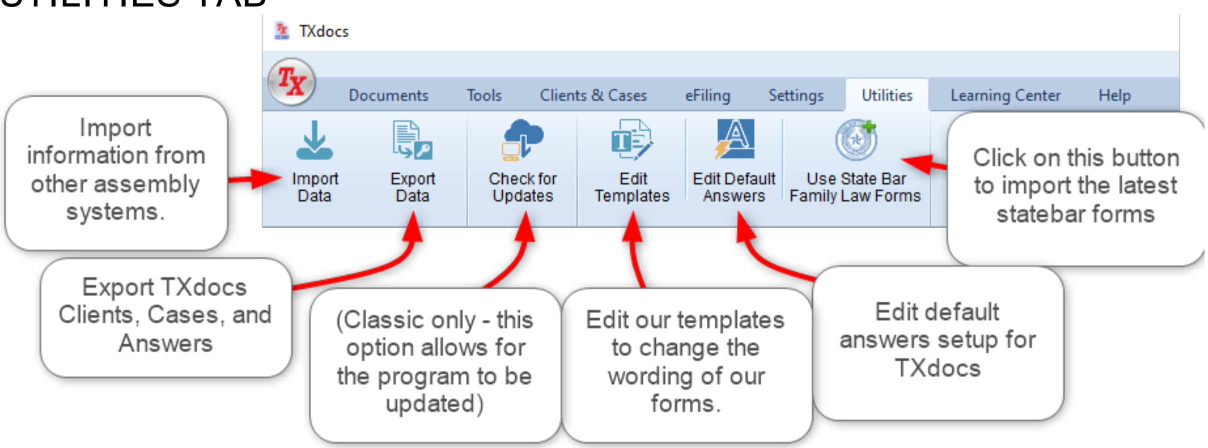
eFiling Tab information

SETTINGS TAB



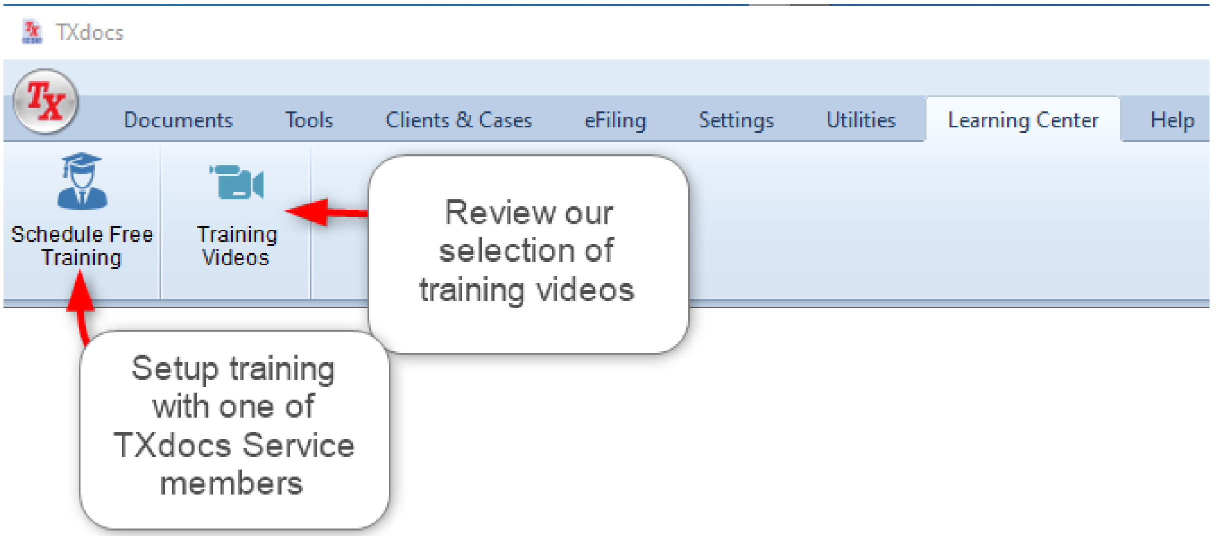
Settings Tab information

UTILITIES TAB



Utilities Tab information

LEARNING CENTER TAB



Learning Center Tab information

Getting Started

2 Getting Started

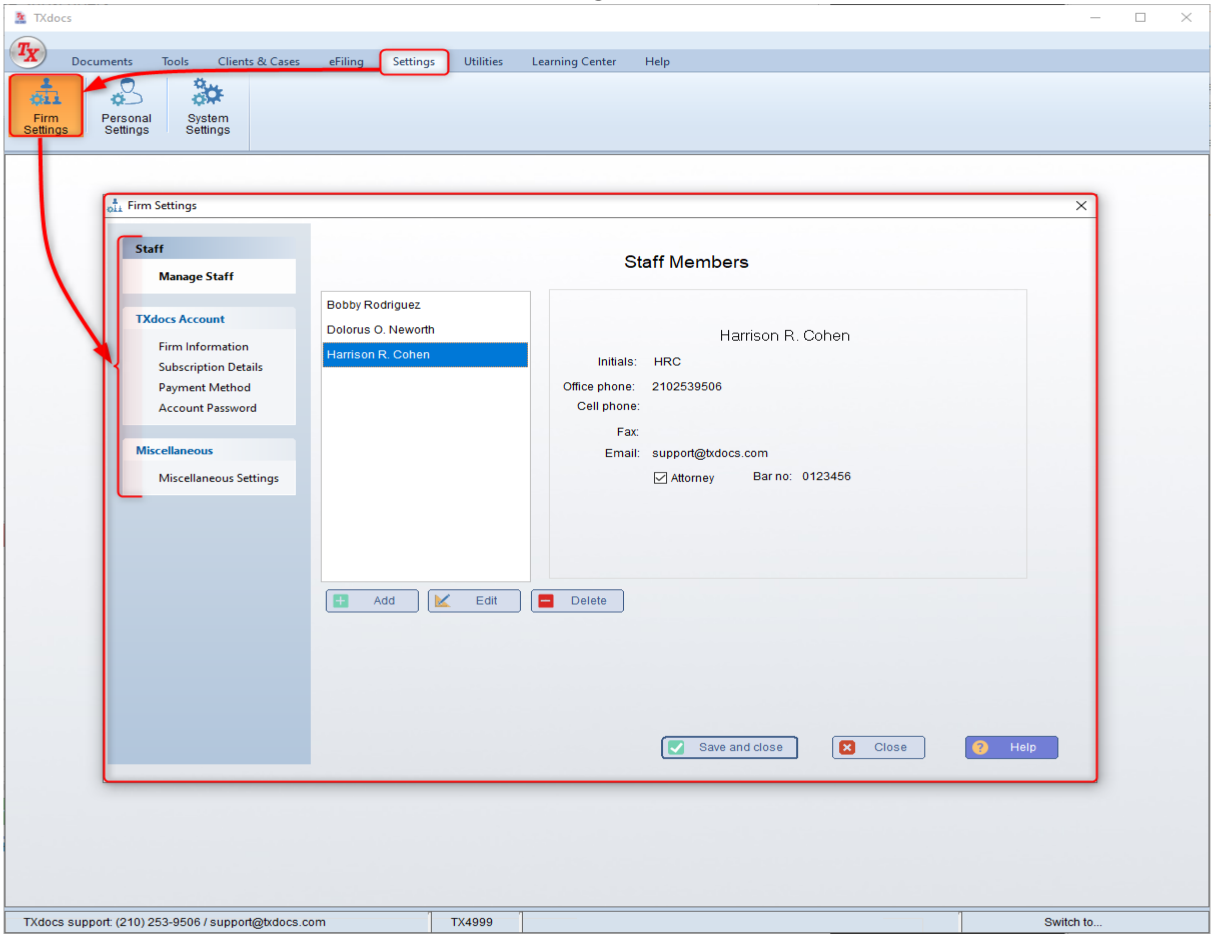
Although you are undoubtedly anxious to get started assembling documents, you REALLY NEED to take a few minutes to set TXdocs up to work the way you want it to. This will save you lots of time and effort n the long run.

Setup - Firm Settings

Start by telling TXdocs a few things about you, your firm, and how you want to work. On the ribbon bar on the main window, select the Settings tab and click Firm Settings.

Complete the following:

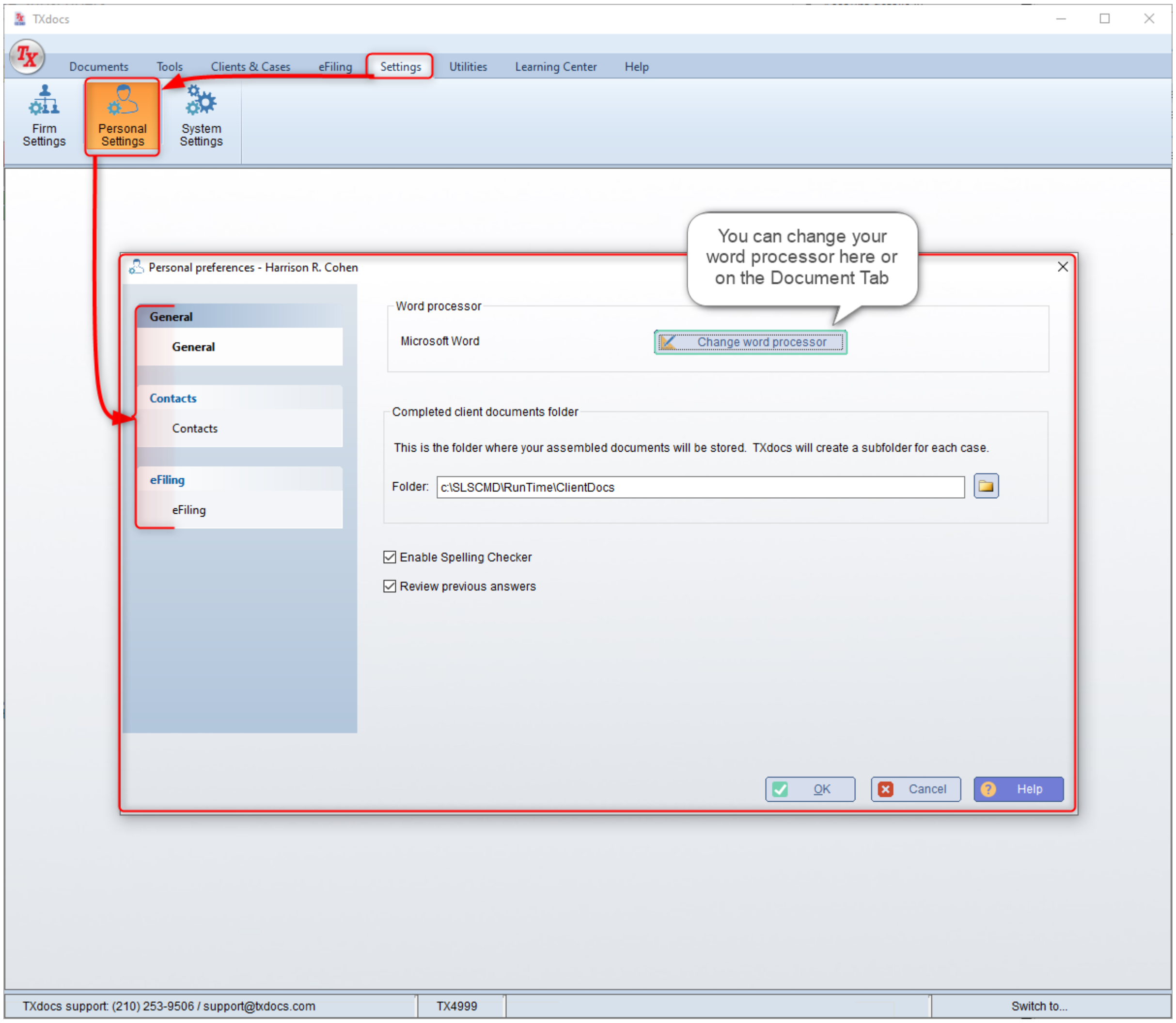
- Manage Staff - add your personal information as a staff member
- TXdocs Account - look here to verify that we have the correct name and other information for your firm.
- Miscellaneous - Enables the efiling service and auto save



Setup - Personal Settings

It is also very important to make sure TXdocs knows which word processor you are using. If this is not set correctly, TXdocs may not format your assembled documents to display or print properly.

On the main window's ribbon bar, select the Settings tab and then click on Personal Settings.



Your next step is to either take time to read an overview of TXdocs and what it has to offer or get straight to assembling documents. For information about either of those choices, make your selection below.

[Introduction to TXdocs]

[How to assemble documents in TXdocs]

Settings - Customizing TXdocs

3 Settings - Customizing TXdocs

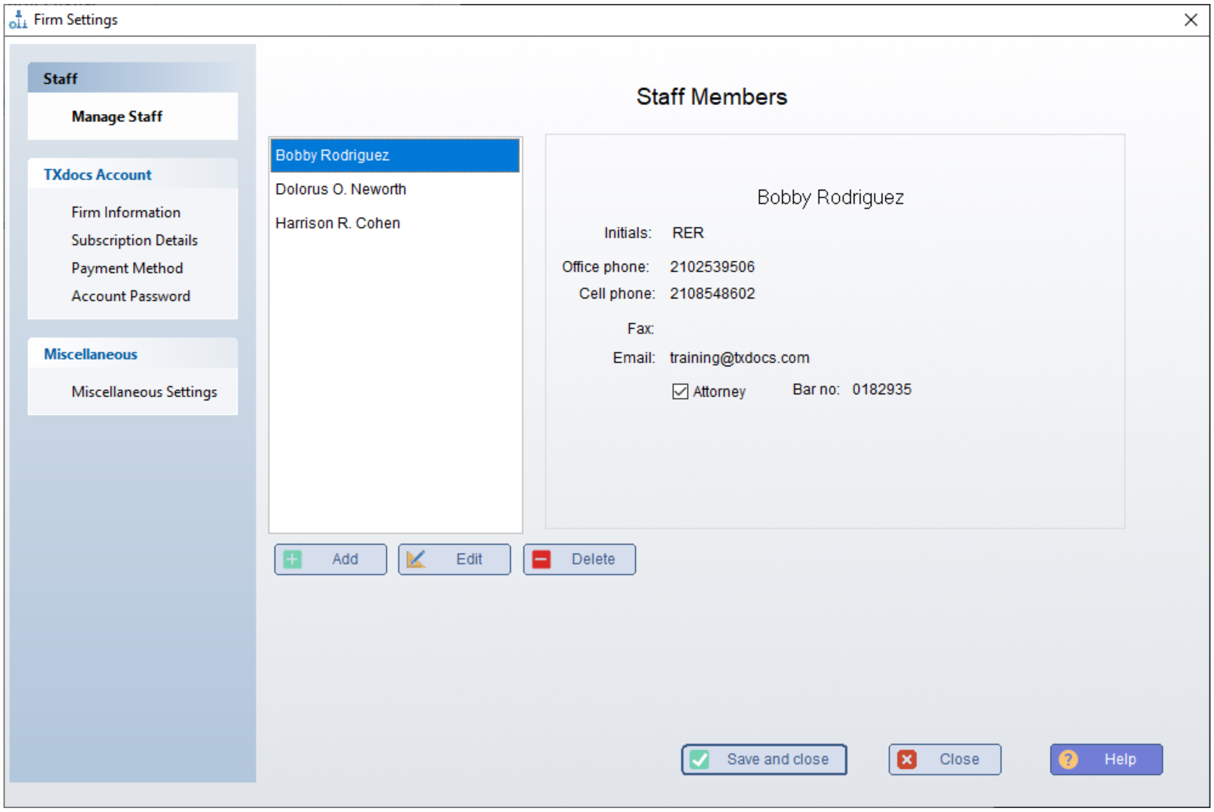
3.1 Firm Settings

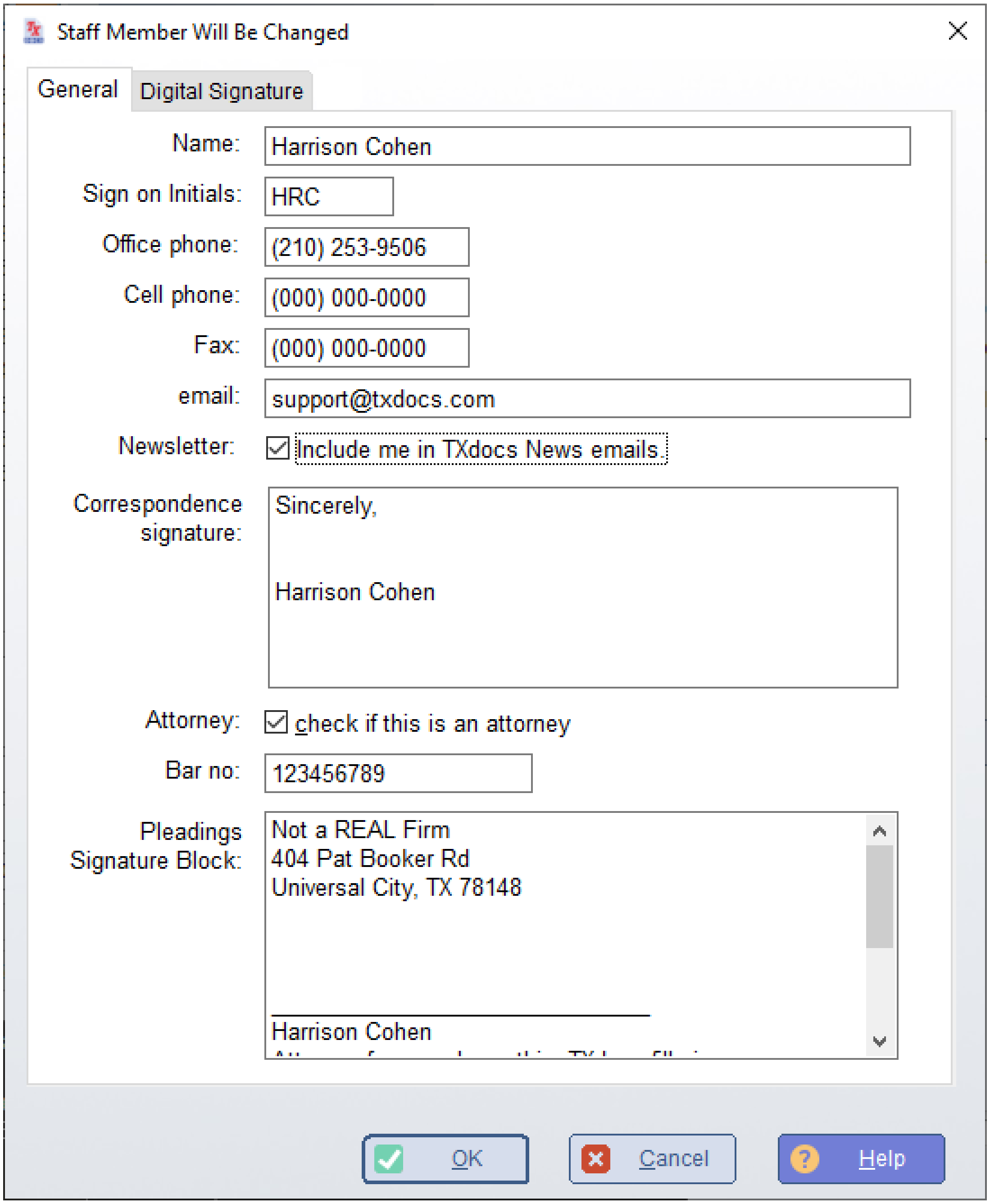
Firm settings apply to everyone in your firm. If you want to customize how TXdocs functions for you specifically, you need to use Personal Settings.

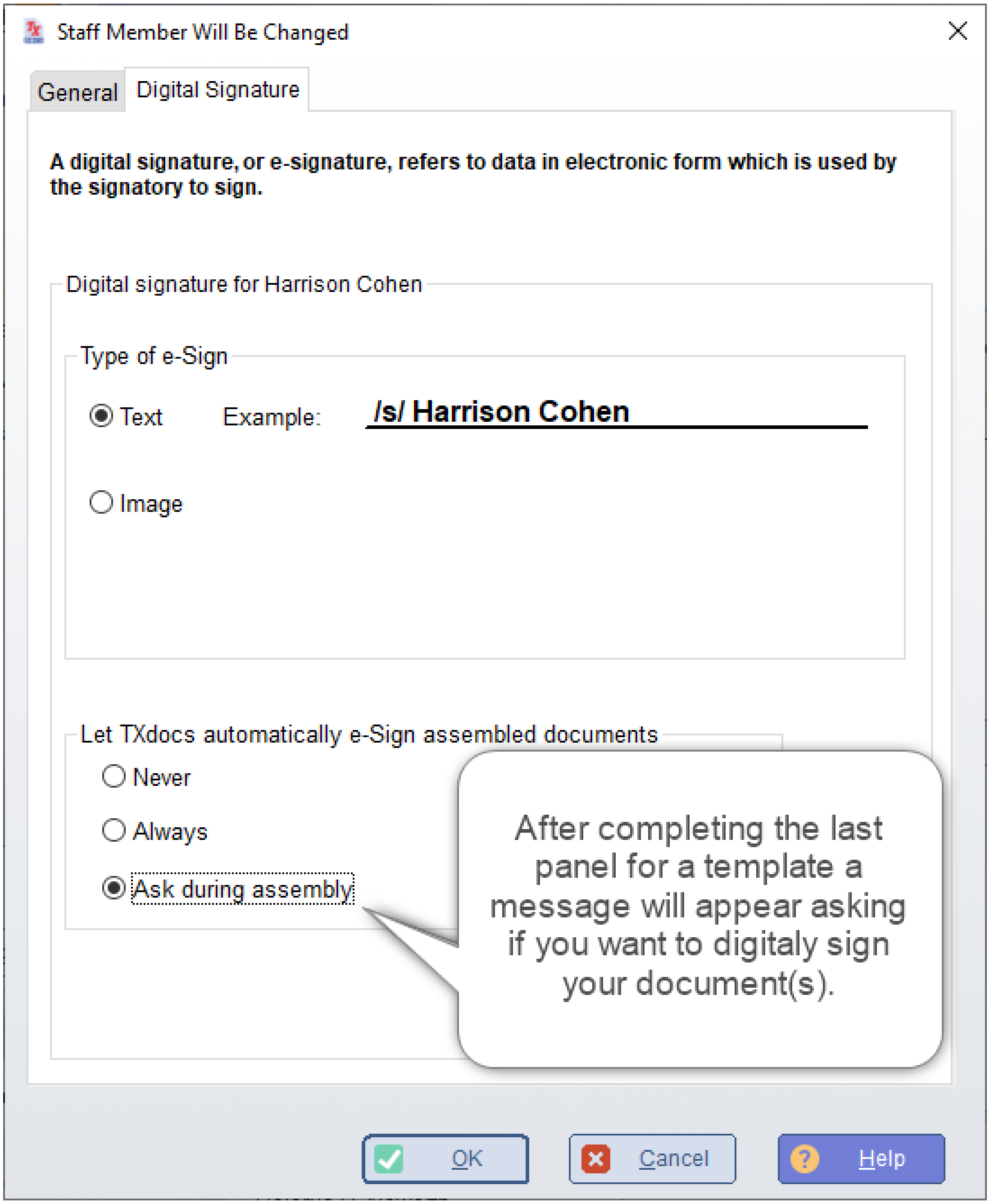
3.1.1 Manage Staff

You need to add everyone in your firm who might be using TXdocs into the list of staff. The information about that person that you enter will be used throughout TXdocs and it will save you a lot of time in the long run.

Click **Add, Edit** or **Delete** to manage the people in your staff list.




Staff Member Will Be Changed
General
Digital Signature
Name:
Harrison Cohen
Sign on Initials:
HRC
Office phone:
(210) 253-9506
Cell phone:
(000) 000-0000
Fax:
(000) 000-0000
email:
support@txdocs.com
Newsletter:
Include me in TXdocs News emails.
Correspondence signature:
Sincerely,
Harrison Cohen
Attorney:
check if this is an attorney
Bar no:
123456789
Pleadings Signature Block:
Not a REAL Firm
404 Pat Booker Rd
Universal City, TX 78148
Harrison Cohen
OK
Cancel
Help


Staff Member Will Be Changed
General
Digital Signature
A digital signature, or e-signature, refers to data in electronic form which is used by the signatory to sign.
Digital signature for Harrison Cohen
Type of e-Sign
Text
Example:
/s/ Harrison Cohen
Image
Let TXdocs automatically e-Sign assembled documents
Never
Always
Ask during assembly
After completing the last panel for a template a message will appear asking if you want to digitaly sign your document(s).
OK
Cancel
Help

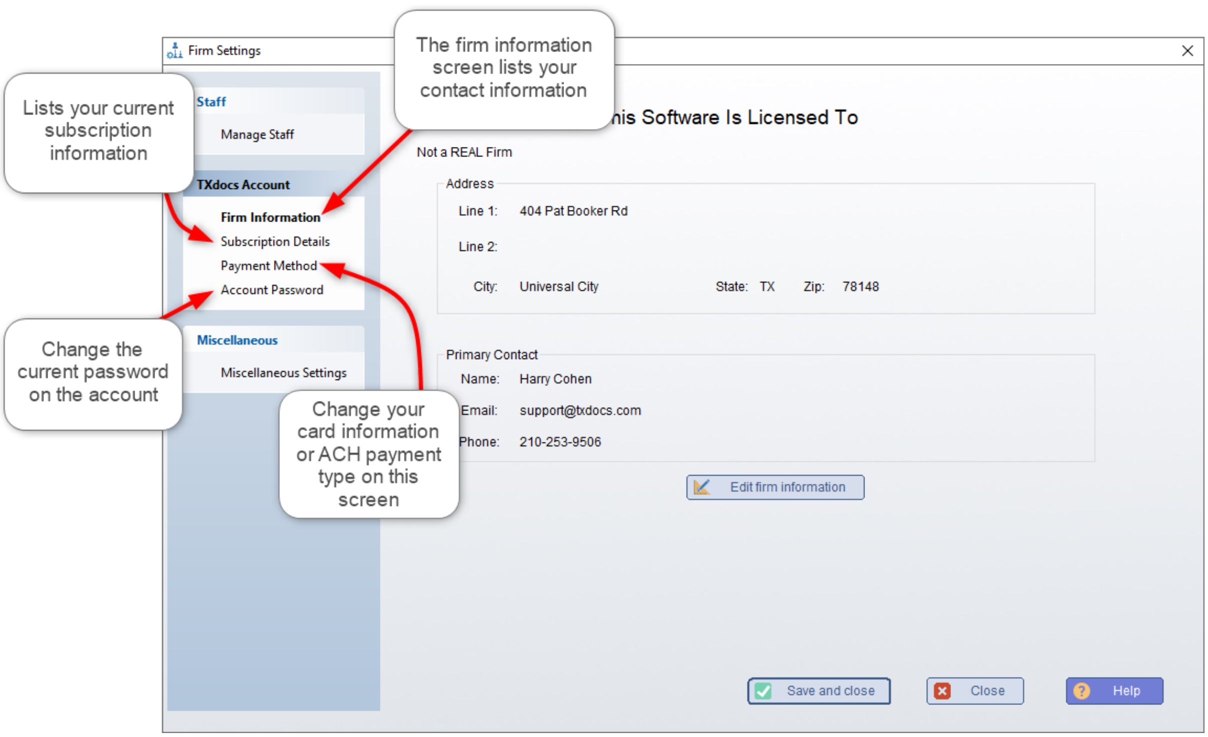
3.1.2 TXdocs Account

This section deals with your account and subscription details. The displayed firm information for your firm's name, address and primary contact can not be changed by you. You will need to contact TXdocs and we can help you make any necessary changes.

Subscription Details: click **Change your subscription** to change the product you subscribe to and/or your number of concurrent licenses.

Payment Method: You can pay your monthly subscription fee by credit card or by ACH drafts against your bank account. Click **Edit payment options** to set up your payments.

Account Password: When you log in to change your payment method, you will be asked for a password. Set or change that password here.



3.1.3 Contacts and Cases

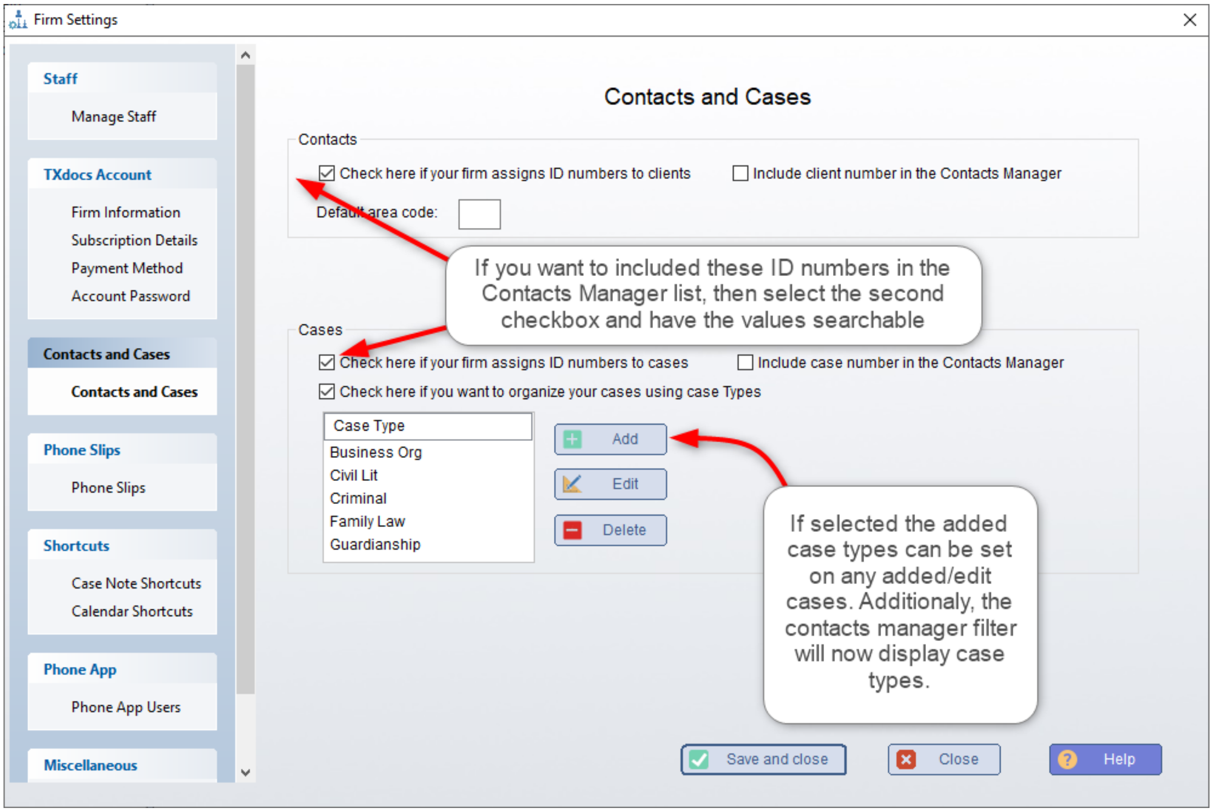
Check here if your firm assigns ID numbers to Clients: Some firms assign ID numbers to clients as they open them. For example "2021-ALS-132". If you want to include client ID numbers when you add a client to the system check this box.

Default area code: Whatever you fill in here will be the area code initially filled in when you add a new client.

Check here if your firm assigns ID numbers to Cases: Some firms assign ID numbers to cases as they open them. For example "2021-ALS-132". If you want to include case ID numbers in addition to case descriptions, check this box.

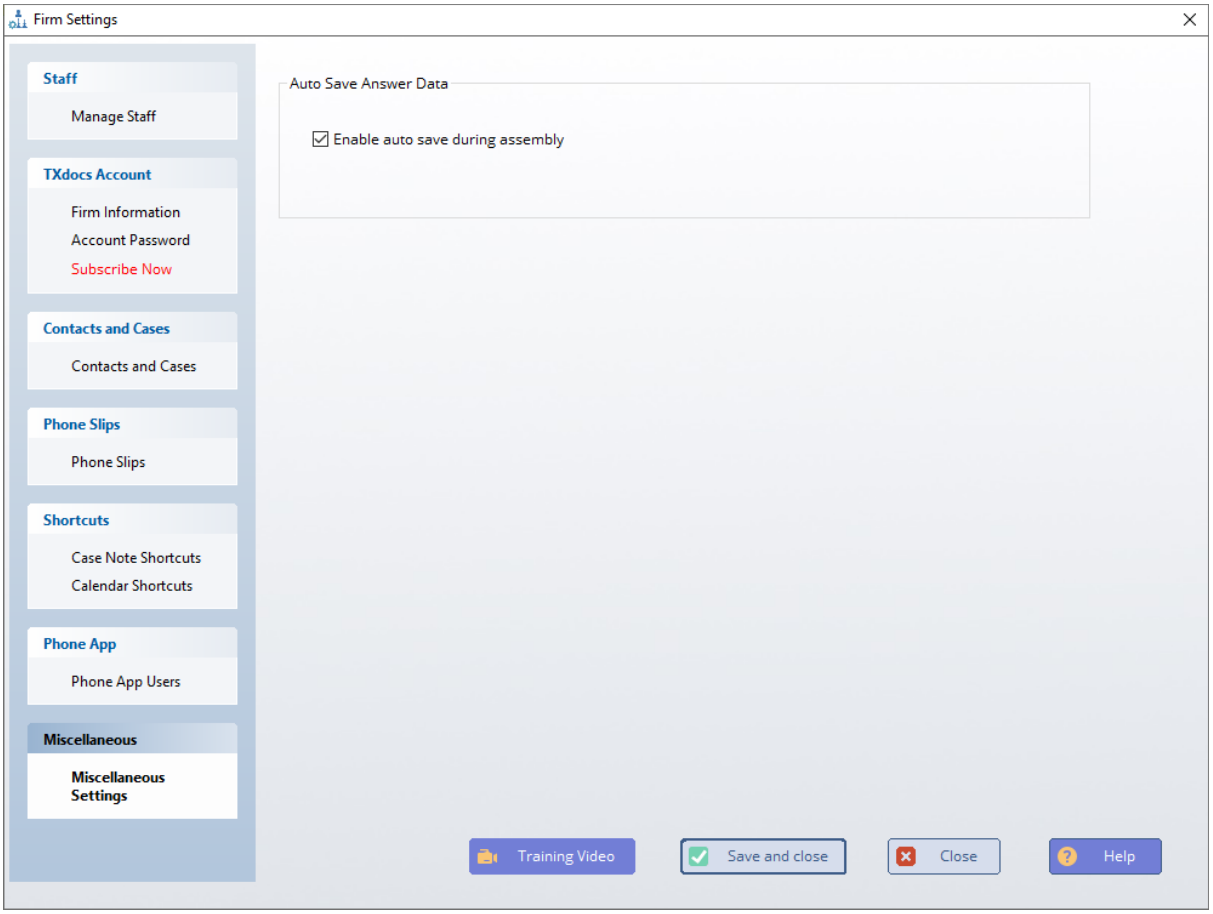
Check here if you want to organize your cases using case types: If you check this box then you can add as many case types as you wish: You can use general types such as "Family" or "Criminal" or you can be even more specific like "Divorce" or "Set Bond ". You will be able to sort, filter and report your cases by case type.

The case types that you add to the list will be available for you to choose from when you add a new case.



3.1.4 Miscellaneous

Enable auto save during assembly: Generally you want to leave this box checked because it tells TXdocs to save the answers you are entering while assembling documents. With this feature turned on, TXdocs will periodically save your answers so you don't lose them in the event of a power failure or some other catastrophe.



3.2 Personal Settings

The settings you make in this section are used only when you log on to TXdocs. Each staff person can set their personal settings the way they want them.

3.2.1 General Personal Settings

Contacts and Forms

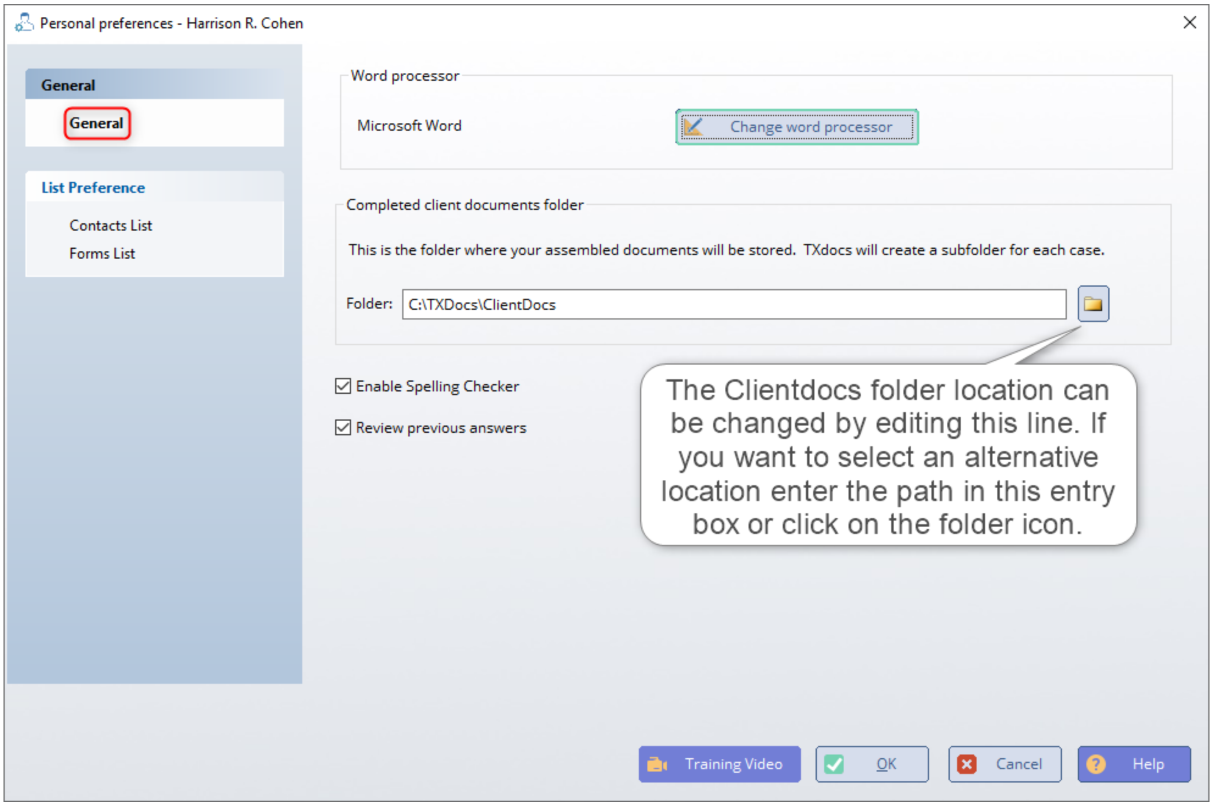
Word processor: TXdocs works with Microsoft Word, Corel WordPerfect or the free word processor - OpenOffice. If you are using

TXdocs Anywhere (our internet version) you will also be able to choose Word 365. It is important to select the correct word processor because TXdocs makes many formatting adjustments to meet the requirements of the different word processors.

Completed client documents folder: This is where TXdocs stores the completed documents after they are assembled. Normally, it is best to just leave this setting alone. When you add a new case, TXdocs automatically creates a subfolder for that case.

Enable Spelling Checker: TXdocs includes a spelling checker for most features. By default, this feature is turned on but, if there is a problem, you can unselect it here.

Review previous answers: If you select a case before you begin assembling documents, at the end of the assembly session TXdocs saves all the answers you entered. In that case when you are assembling more documents at a later date, TXdocs will show your prior answers so that you don't have to retype them. If you unselect this option, then TXdocs will skip right over any questions with previous answers rather than just displaying those previous answers. Telling TXdocs to not review previous answers can be an additional time saver. The disadvantage of not reviewing previous answers is that you will not see those answers if you want to change them. If you uncheck this box to not review previous answers, you will still have the option of telling TXdocs to review previous answers as you begin a document assembly session.



3.2.2 SetupPersonalEmail

Contacts and Forms
In TXdocs' Contacts Manager and Case Manager there are many places that display email addresses for your contacts that are in TXdocs. There is usually a button next to that email address that will let you quickly and easily send an email to that person. And, if you have a case selected, TXdocs will automatically save a copy of that email in the Case Manager for that case. Of course, none of this is possible unless you give TXdocs the setup information it needs to handle email. There are two ways to set up email: (1) Here, in Personal Settings, you can enable TXdocs' integration with Microsoft Outlook; or in Firm Settings you can set up TXdocs to use SMTP email service.

NOTE: Outlook integration is not available in TXdocs Anywhere (the internet version) because TXdocs is located on a Rackspace internet server in Dallas while your Outlook program is installed on your local computer. Instead, you will have to set up TXdocs to use SMTP.

If you do not use Outlook and you do not set up SMTP email service, then you will not be able to send email from within TXdocs.

When you enable TXdocs' Outlook integration, it tells TXdocs to send all email from you through your Outlook. This means those emails will be available to you in your Outlook Outbox and Sent box. Additionally, enabling this feature causes TXdocs' Email Manager to now be available to you on the ribbon bar Practice Management tab.

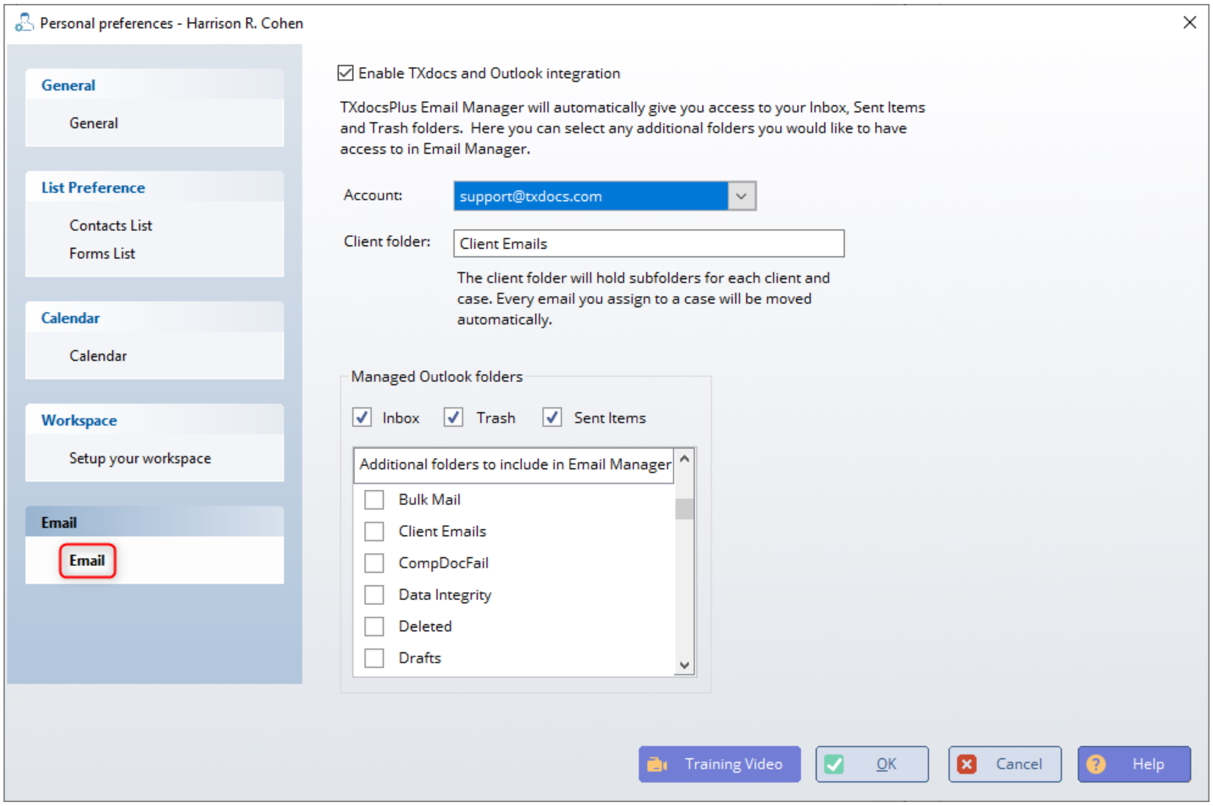
TXdocs Email Manager gives you the ability to drag emails that are received through Outlook and then drop them onto cases. When you drop an email on a case, TXdocs creates a copy of the email and stores it with the case. In Case Manager, there is a tab where you can view all emails that were received and sent that relate to this case. If you select the related case when you send an email TXdocs will automatically store a copy of that email it will be available to you in the Case Manager.

Enable TXdocs and Outlook integration: If you uncheck this box then you will no longer see the Email Manager button on TXdocs' main ribbon bar. NOTE: After you enable this integration, you may need to restart TXdocs for the Email Manager to function properly.

Account: If you have more than one account in your outlook (very unusual) then you will need to select the account that you want to use with TXdocs.

Client folder: TXdocs will create this folder in Outlook and it will also create subfolders under it for each case . Then, after you drag and drop an email into a case, the original email will be moved from your Inbox or Sent box into the case's subfolder in the Client Emails folder.

Managed Outlook folders: This tells TXdocs what Outlook folders you want to manage in the Email Manager. By default, TXdocs will make all items in your Inbox, Trash and Sent Items folders available for you to drag to a case. In this section you can add or remove folders that you want TXdocs to show you.



3.3 System Settings

3.3.1 Backup options

Backup Enabled: This check box enables you to to backup the data of TXdocs to a location on your computer. The default location is set to C:\TXdocs\Backups. Once enabled you can edit the location, time and amount of backups retained.

Include ClientDocs Enabled: For each backup created you have an option to enable saving the client docs. This will save all previous client files and isn't recommended on machines that are lacking in storage.

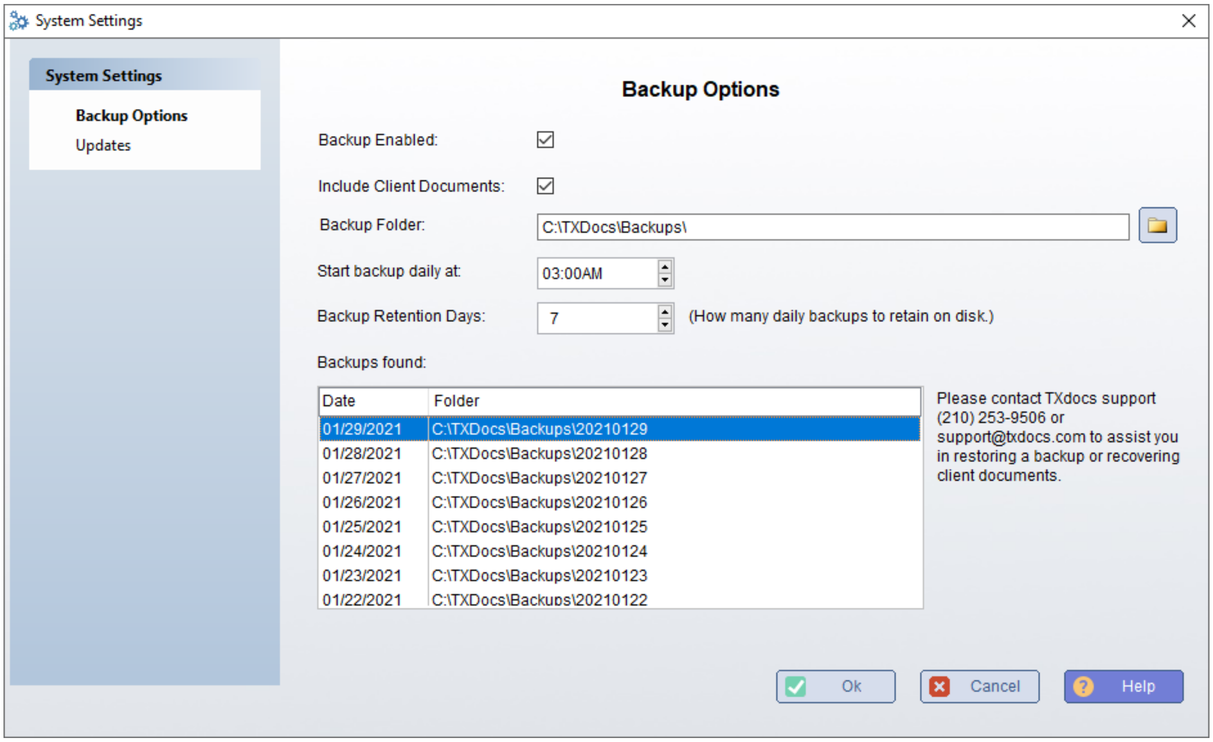
Backup Folder: Tell TXdocs where you want your backup files stored.

Start backup daily at: Tell TXdocs what time you want the backup to start. Remember, your computer will need to be running at that time in order to do the backup. (NOTE: The computer just needs to be running, Txdocs itself does not need to be running.

Backup Retention Days: Each day, TXdocs creates a complete copy of all data (and client documents if selected). The question is, how much disk space do you have available to store those backup files. The number you set here is the number of days the backup files will be stored. For example, if you set this to 7 days, then you will have only 7 days worth of backups. On the eighth days from today, the backup files for today will be replaced by that day's files.

Backups found: This is simply a list of the days' backup files were found by TXdocs. It's a good way to double-check to make sure backup files are being made.

NOTE: If you are running TXdocs on a server at the office, then the backups will be made by the server.



3.3.2 Security

You can apply additional security to the program. If enabled the initials screen will contain an additional entry box reserved for a user specific password. With the implementation of security checked on the office administrator can assign rolls to each staff member restricting access to the program or to program features such as billing to firm and account information.

General: This tab lets you enable security in the program and setup rules for the password.

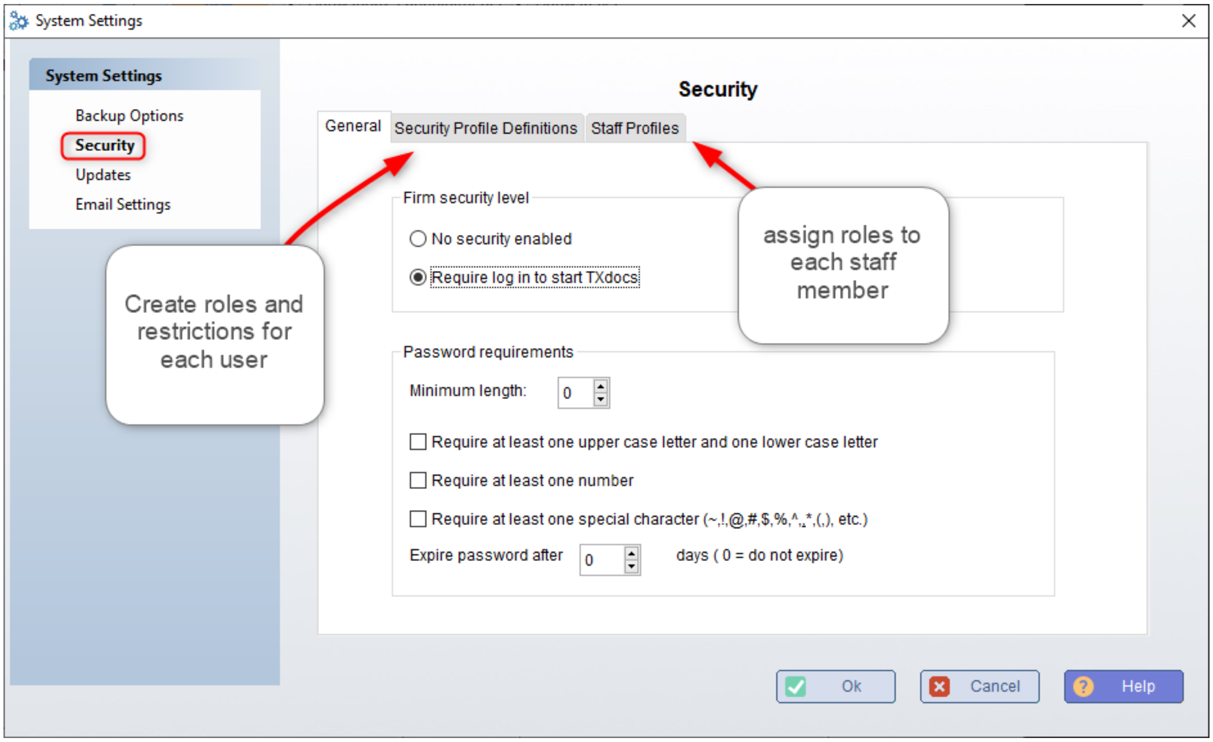
Security Profile Definitions: This table lets you add roles for your staff members. You can break up a users roll in 4 sections general features such as allow access to the calendar, case manager, and cws. To edit features, system and firm settings, and lastly billing features.

Staff Profiles: This will display all staff members in the program. You can right click and add the security profile roles to each staff member. We REQUIRE that 1 staff member must be set t o supervisor.

Password requirements: If you do not make any selections in this section, then your staff members will be able to set anything they want as a password.

Expire passwords after ___ days: If you set a date for this option, then every time that number of days expires, each staff member will be required to change their password before they can continue in TXdocs.

Password reset: On the Staff Profiles tab, you can highlight a staff member and click the **Password reset** button. After that, the staff member will be required to create a new password the next time they log on to TXdocs.



3.3.3 Updates

Check on start up: The update checker runs on the applications start up for any user on the server.

Check every 12 hours: The program will run the update check in the background every 12 hours.

Check upon login: If you have multiple staff members setup in TXdocs then you can assign a specific sign in initials to trigger the update checker.

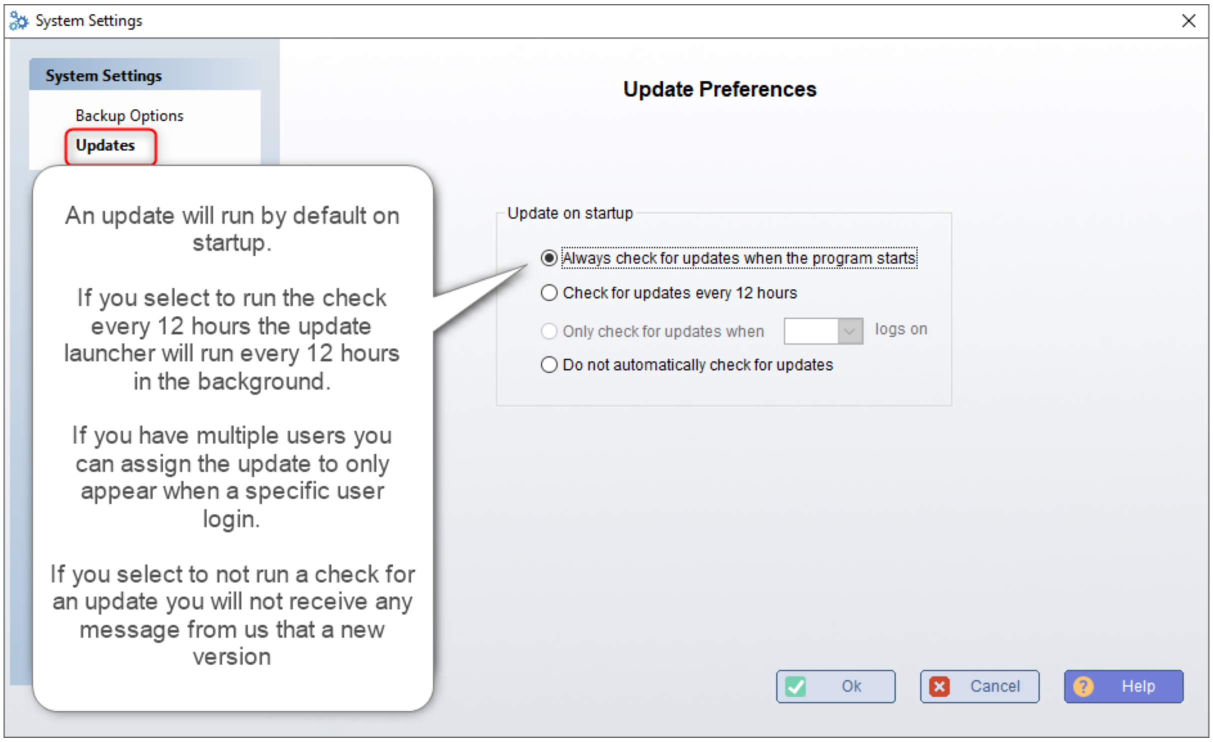
Don't Check: When the program launches the update checker will be off any you will not be able to see when a new update is available.

This setting is totally irrelevant to and not available to TXdocs Anywhere (our internet version) subscribers because we update our internet server automatically for you as soon as an update is available.

TXdocs releases updates to the software and forms very frequently. You should leave this item set to automatically check for updates. Don't forget that sometimes those updates include critical changes or fixes to software or forms and you really do need to make sure you get them.

How you should tell TXdocs to check for updates will in large part depend on whether you are running TXdocs installed on your own laptop or if you are in the office with TXdocs installed and running on a server.

Always check for updates when the program starts: If you have TXdocs installed on your laptop, this is the setting you want. On the other hand, if TXdocs is running on a server that is always turned on, this setting would never check for updates since the program runs constantly.

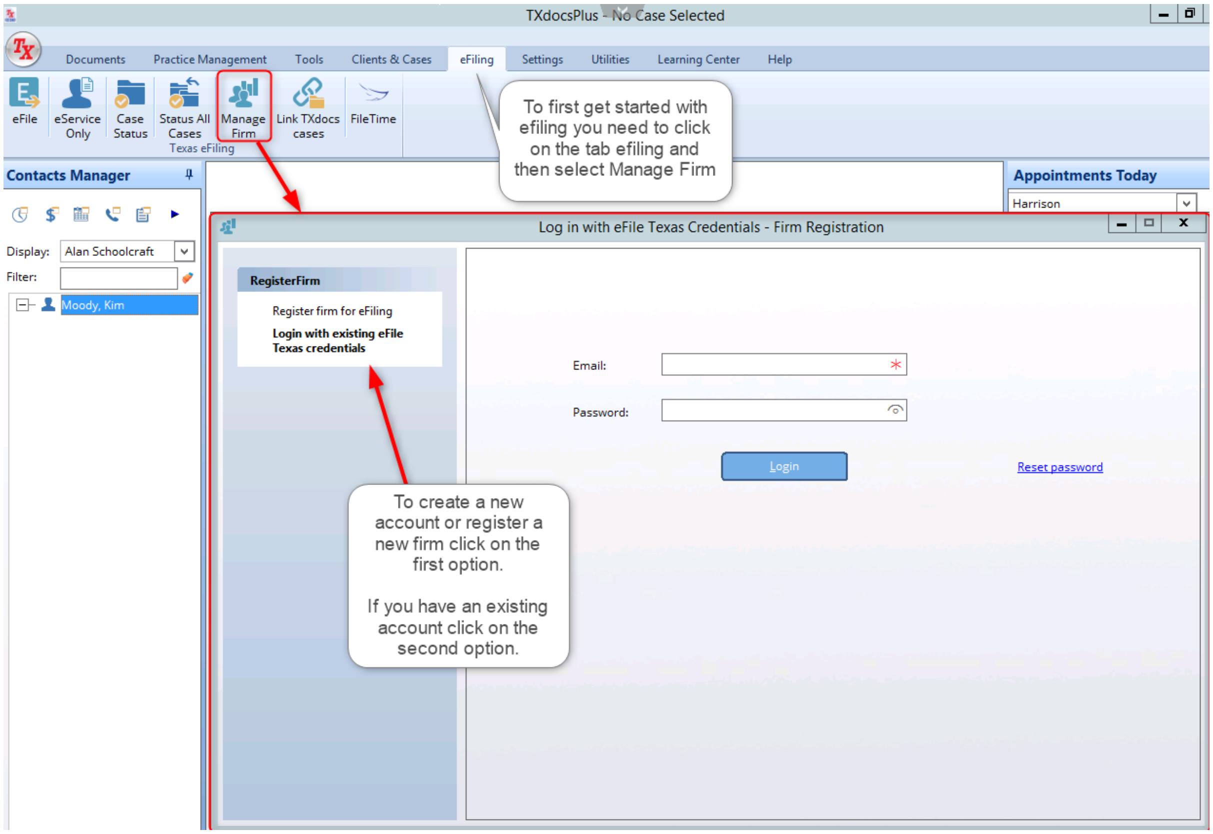


Efiling Overview

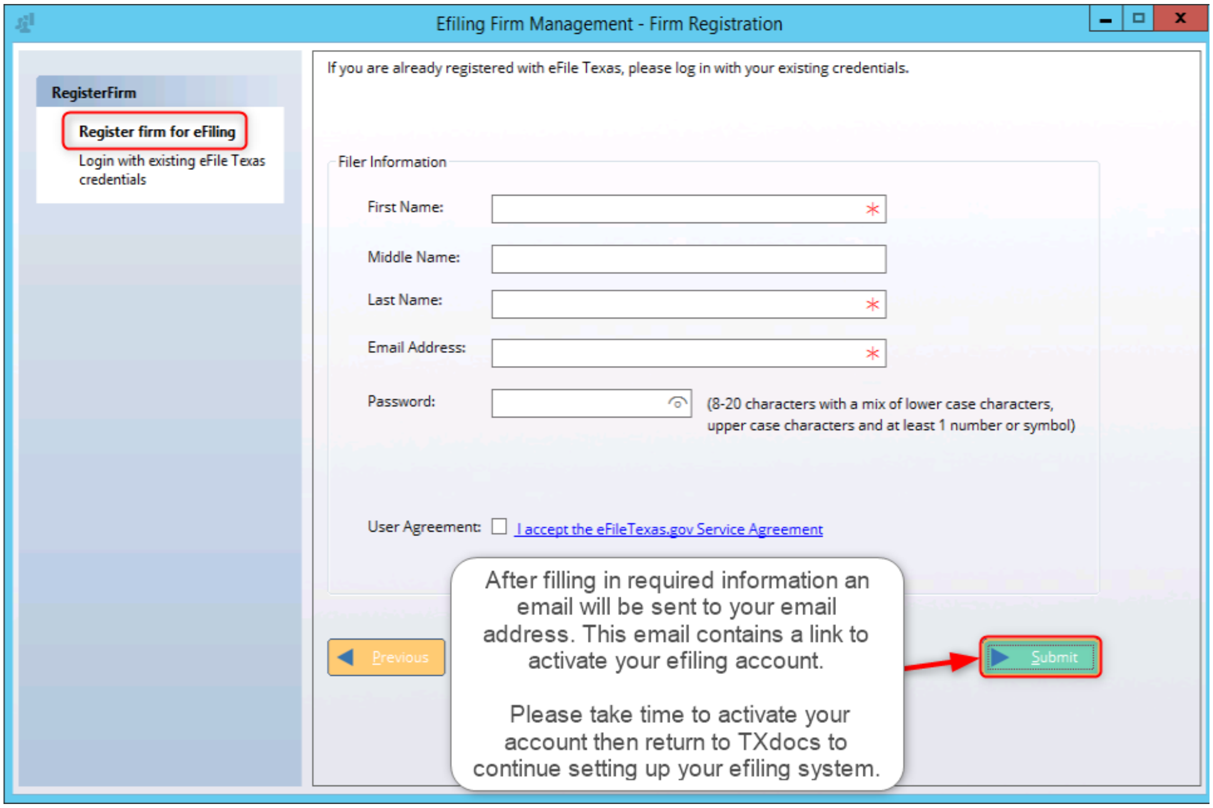
4 Efiling Overview

4.1 Login to efiling

To get started with eFiling you first need to select the tab eFiling at the top of TXdocs. This section will display all of our eFiling features - eFile, eservice only, case status screen, manage efiling firm, link TXdocs case, and if enabled access to the alternative eFiling program FileTime. When first getting started with our eFiling system you will need to create a new eFiling account or connect an existing account with TXdocs. To either connect an account or register a new firm for efiling you can click on the button Manage Firm.



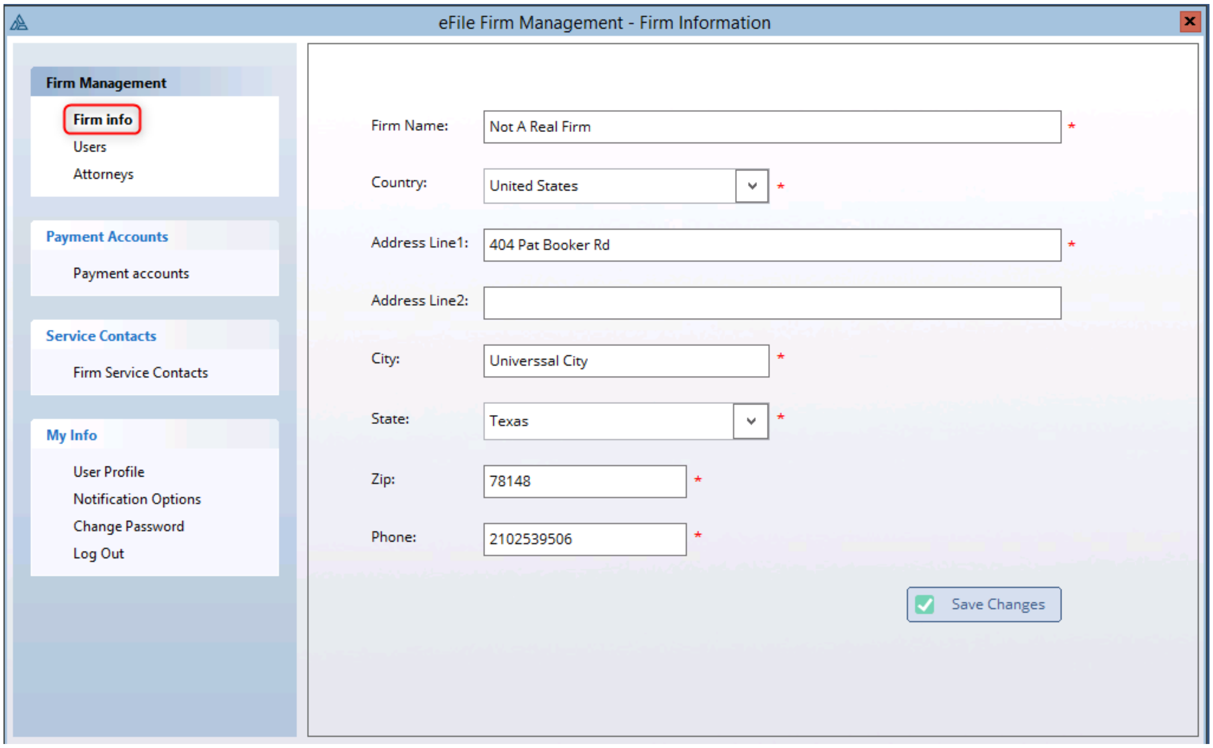
If you need to register a new firm please select the first option on the left hand side of the the Firm management window. The register firm for efiling screen will ask for information about the filer and the firm. Please fill out all required fields; a required field is marked by an asterisk "*". After you click on submit check your email and click on the activation link. When TXdocs has been activated you can return to your program and begin eFiling.



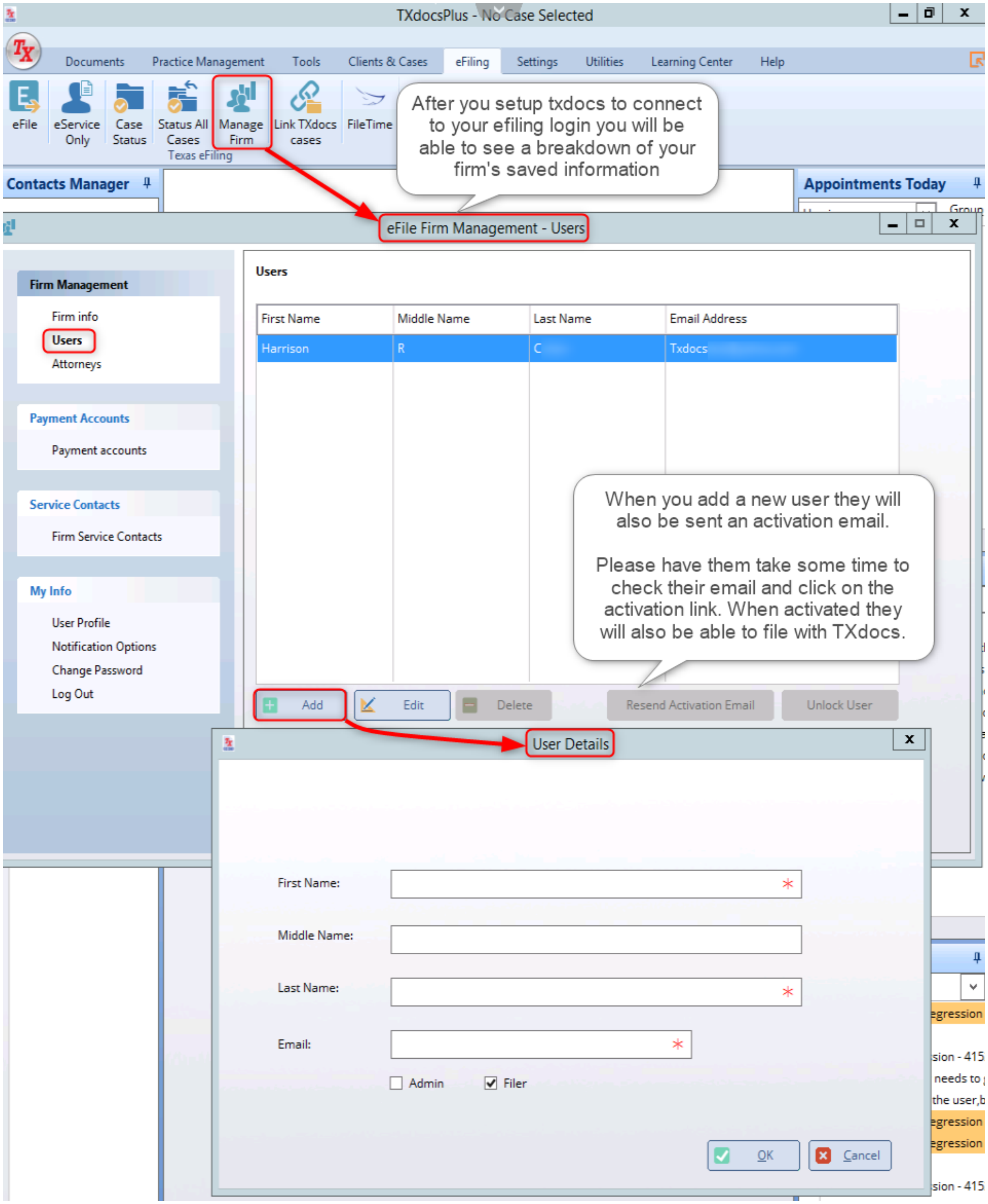
4.2 Manage Firm

After a firm has been registered or you have logged into an existing account clicking on firm management will load your current account information. On firm management you will be able to edit staff information, payment accounts, Service contacts, and alternative information. Additional info regarding (Log Out) can be found in a later help section.

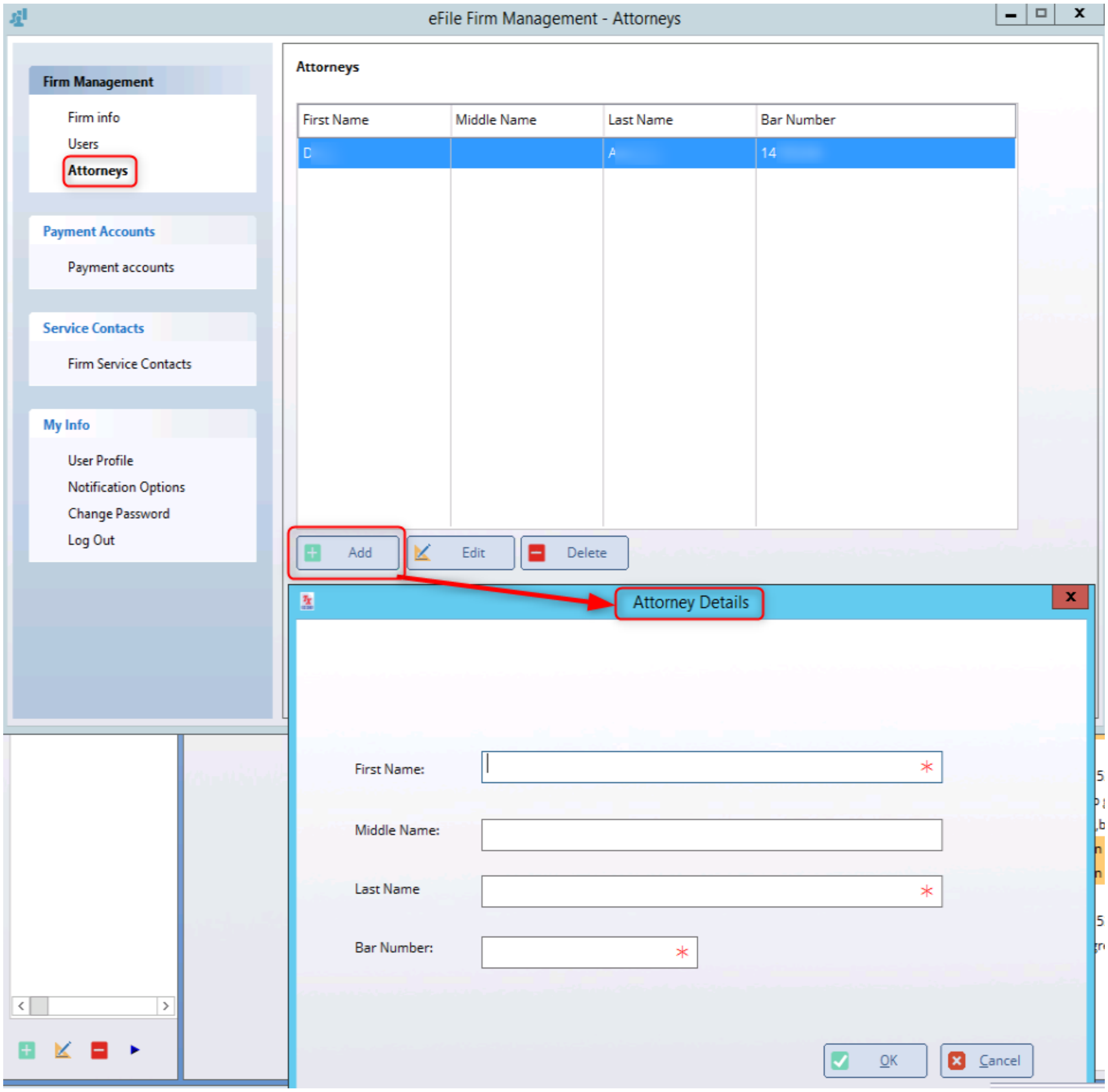
Firm Info - Enables you to change the firm information listed. Changes such as the name of the firm address and contact number



Users - Add an edit any users on the program. Enable users to have admin & Filer privilege

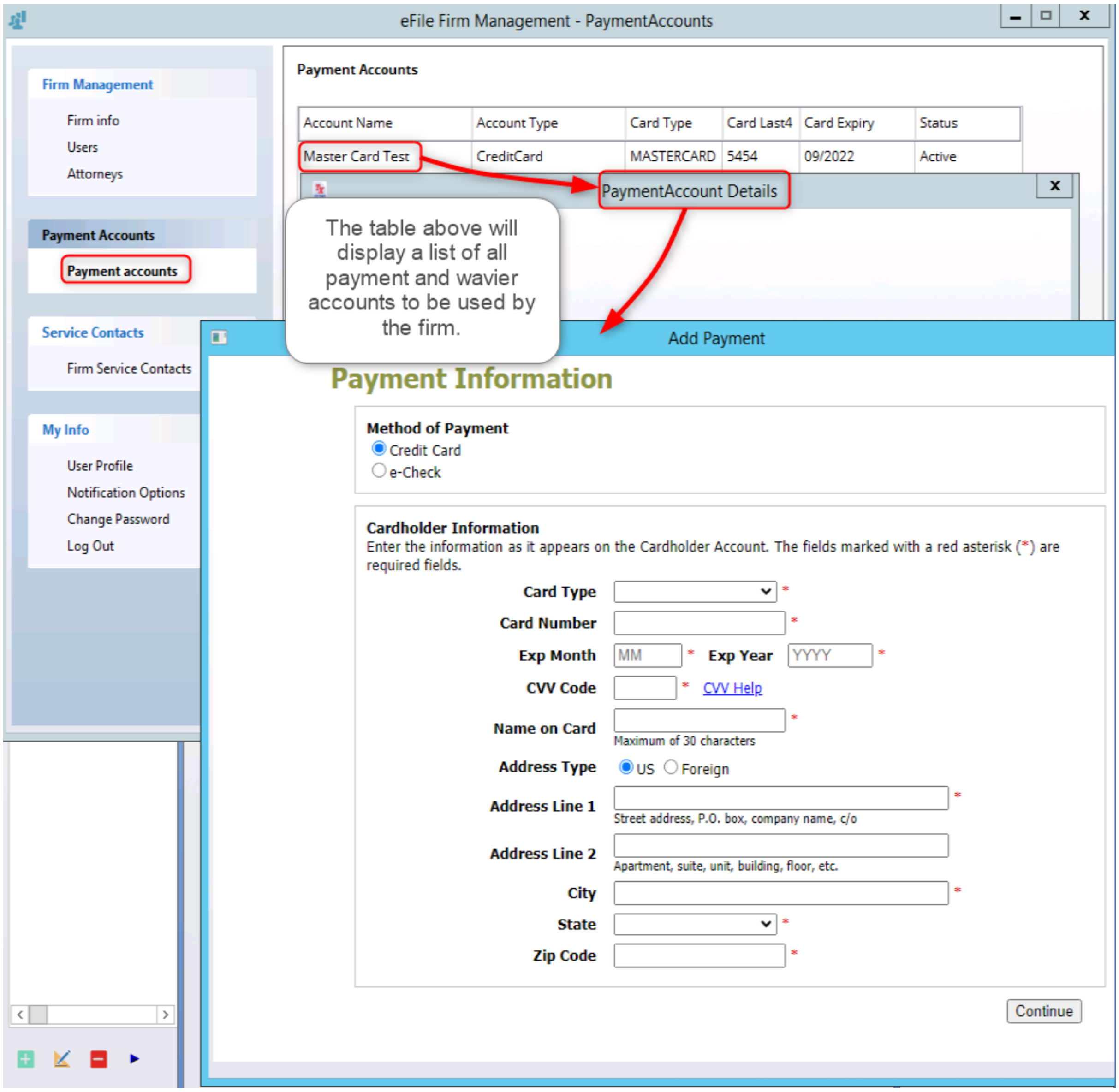


Attorneys - Edit or add attorneys to the account. This requires a valid bar number



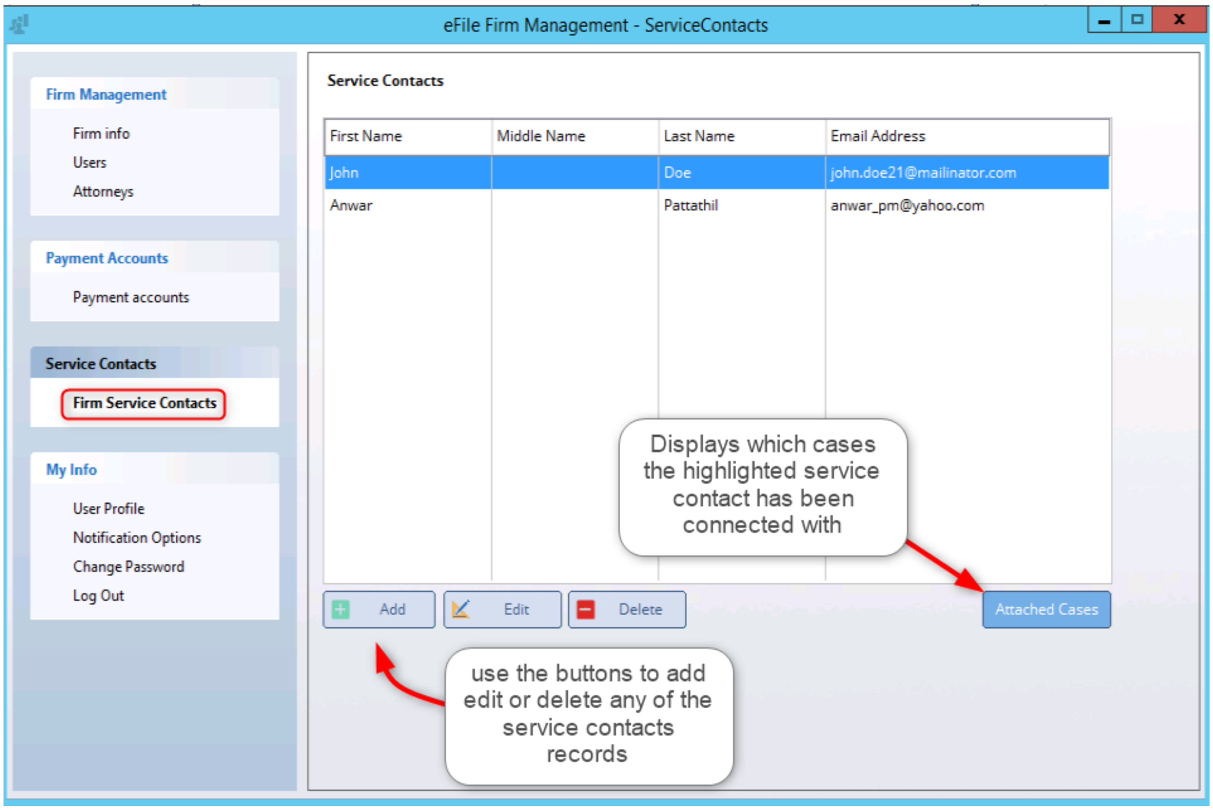
Payment accounts

Payment accounts - Upon clicking on adding a payment account the page will connect to TOGA payment solutions.



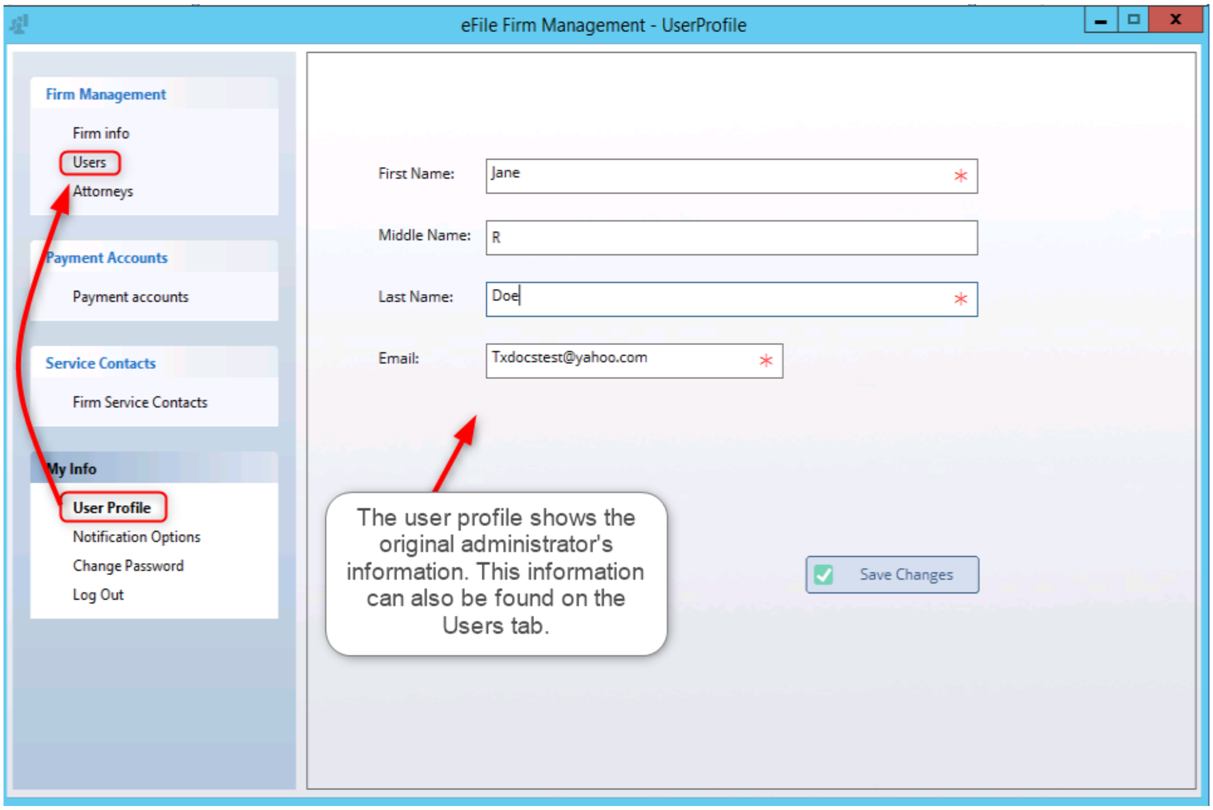
Service Contacts

Services - Instead of looking through the public records you can setup common service contacts within Firm Management and select them in the efiling eservice section. This page also displays which cases these services are attached to.

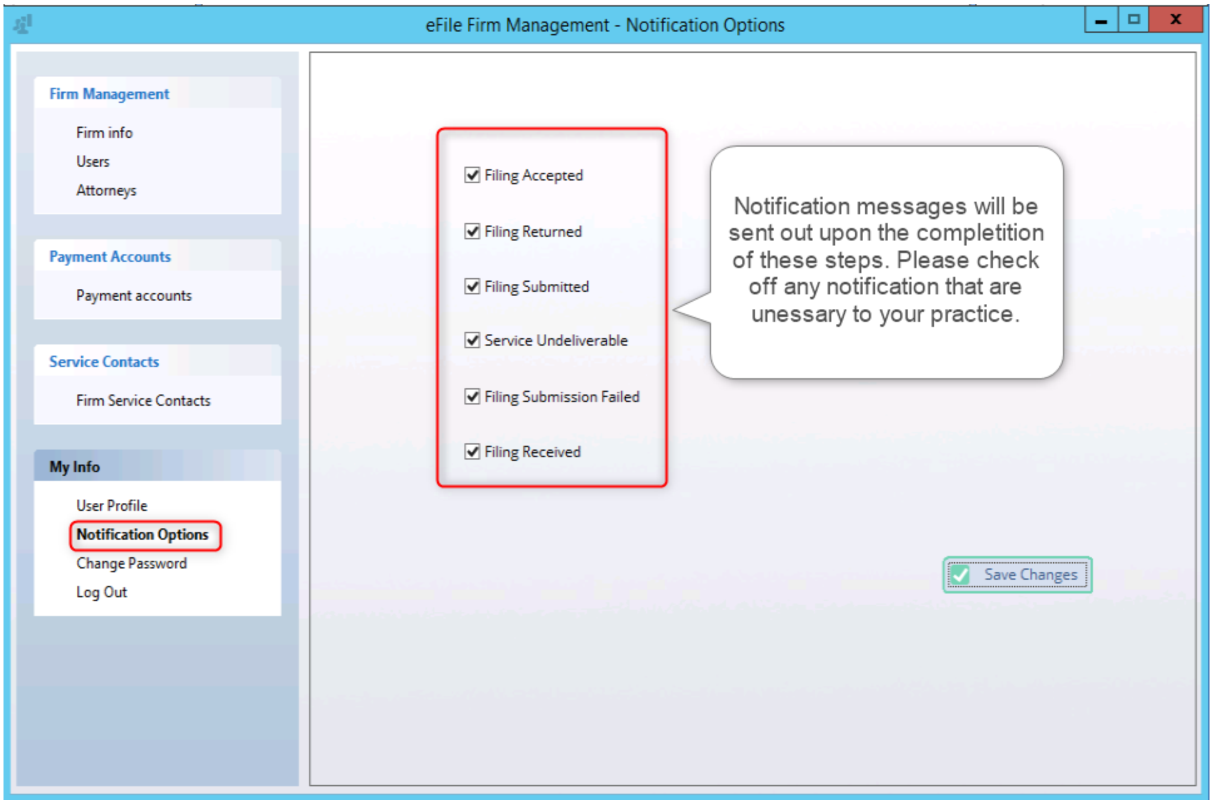


User Profile

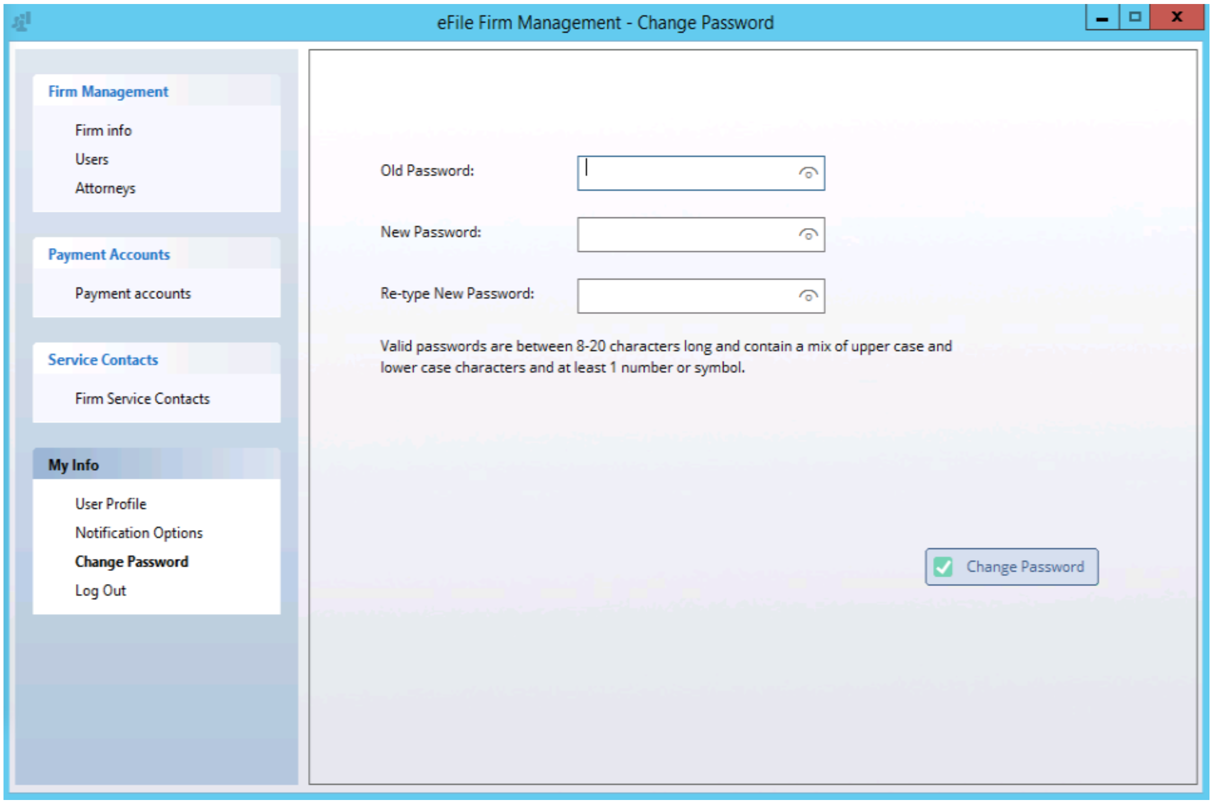
User Profile - Changes the default user settings



Notification Options - This changes our notified settings.



Change Password - If you need to change the registered password you can click on this option to insert the old password and then type a new password.

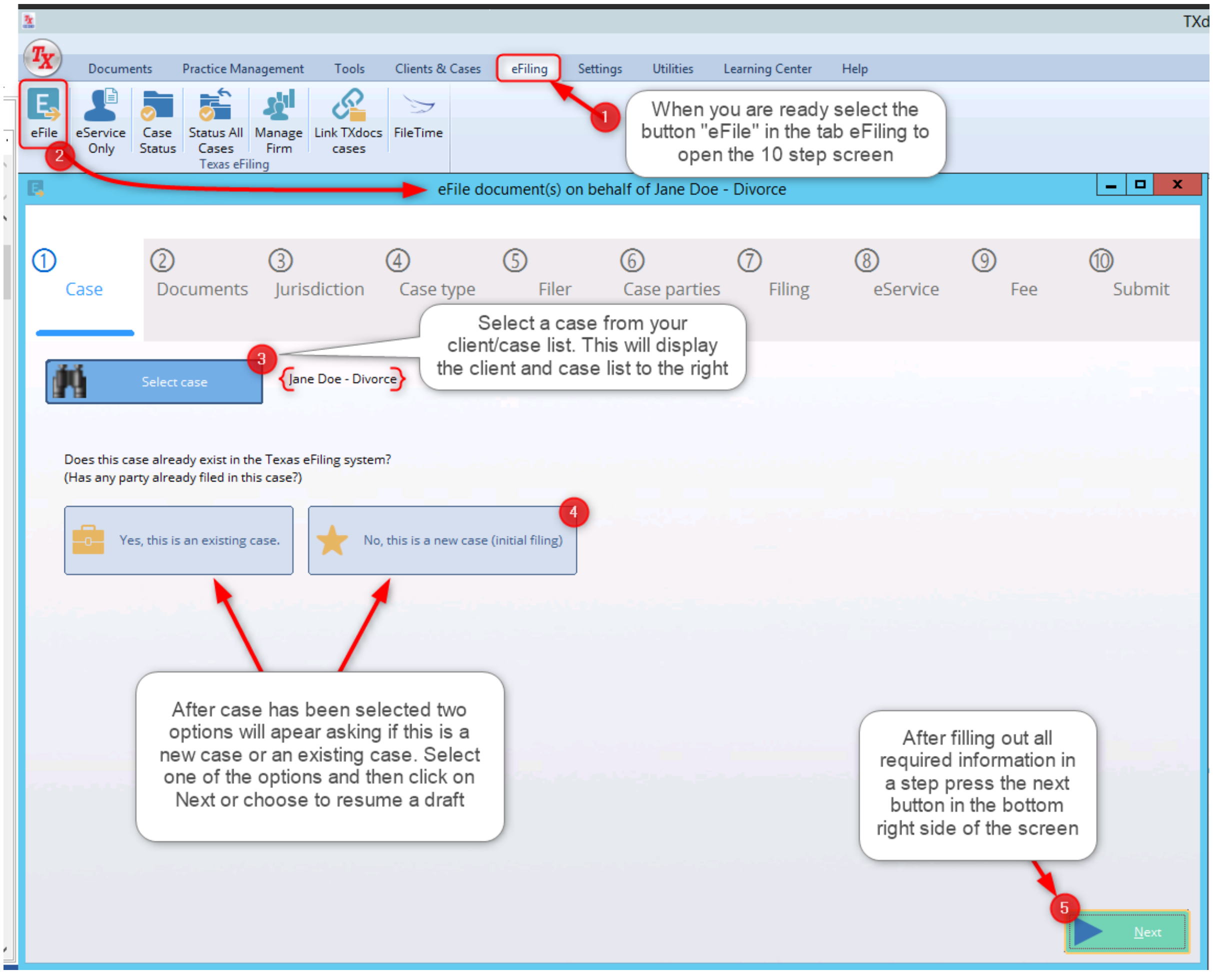


4.3 Step by Step Efiling

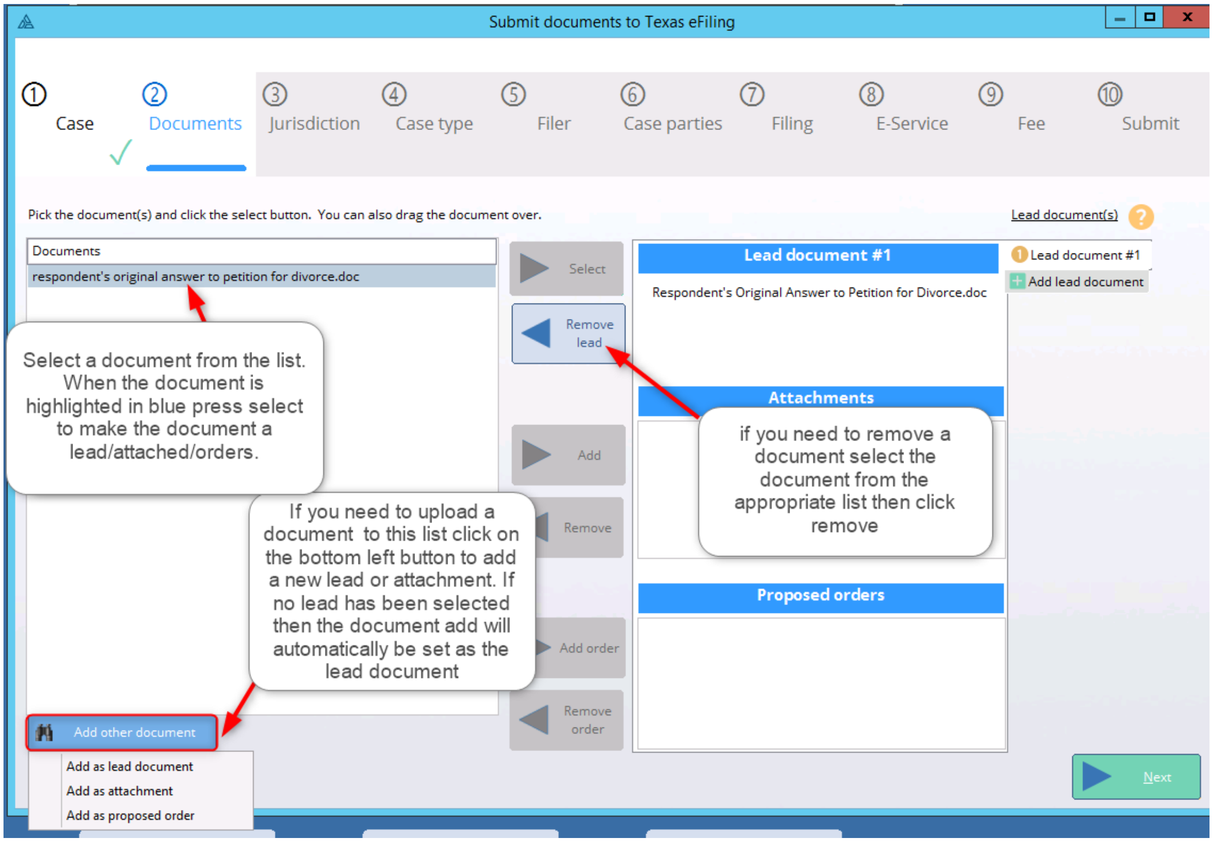
After logging into our eFiling system you are ready to begin filing your documents with TXdocs. To start click on eFile at the top left of the TXdocs program

The submit screen will open with our 10 step eFiling process

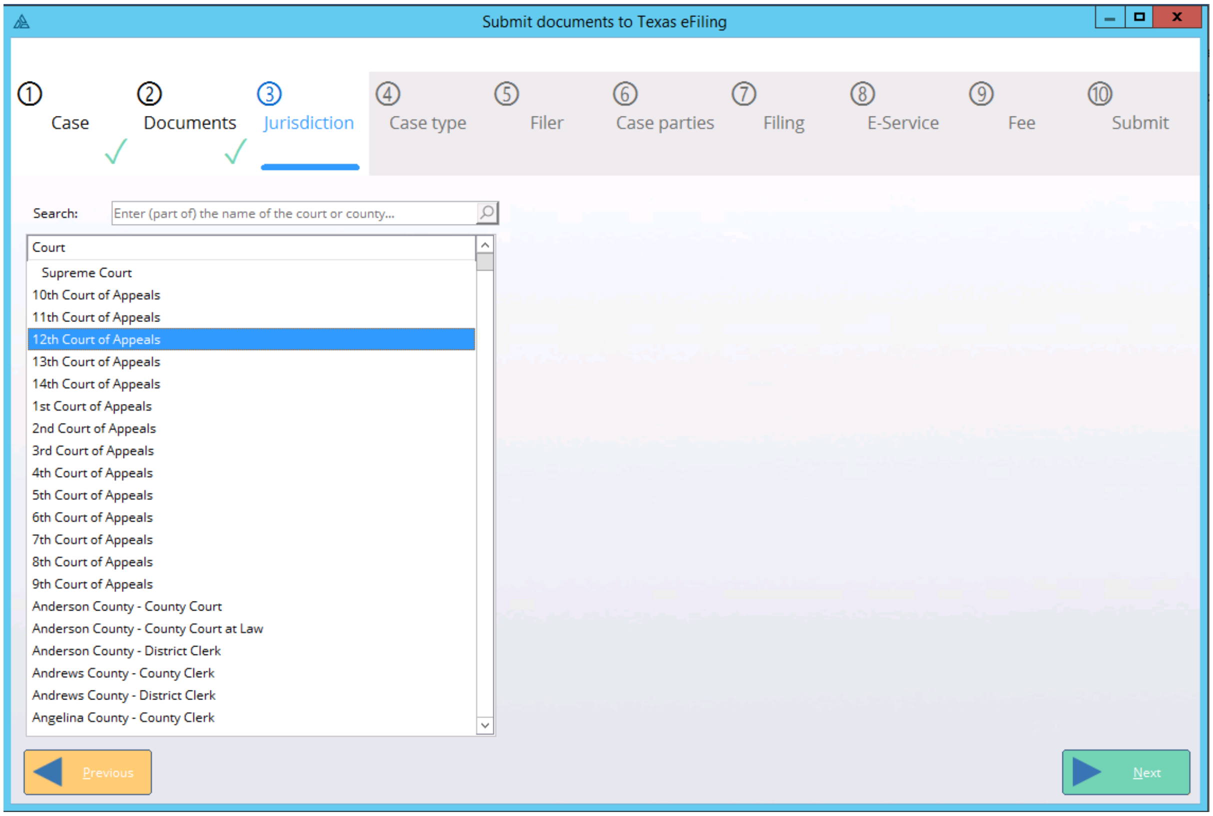
Step 1. Select a case and determine if the case in an initial filing or for an existing case. NOTE: If you decided to quit in the middle of submitting your document you can save the information as a draft (Click here to see recovering a draft). Upon selecting your case and initial filing a second option will appear asking if you want to recover/revisit the found draft.



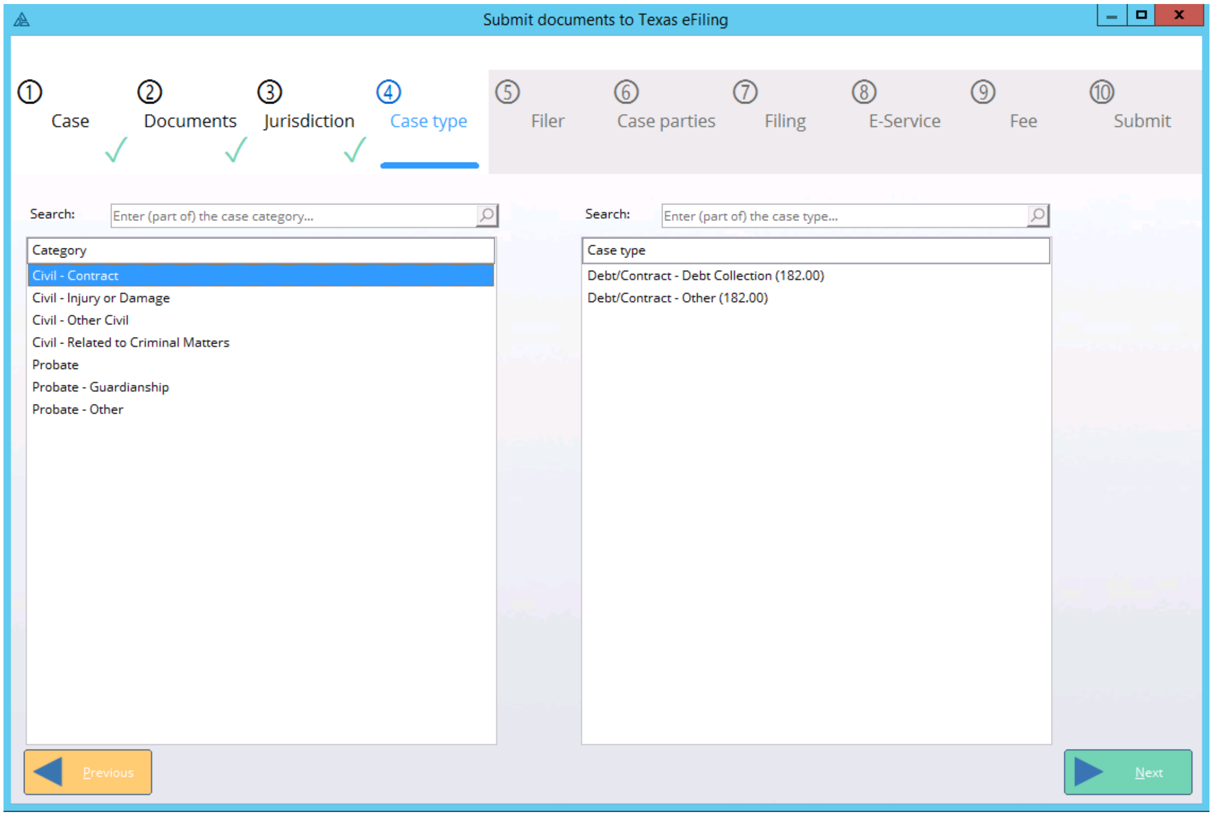
Step 2. After the case has been selected the list of assembled documents for this case will be listed on the left-hand side. The right side will display the selected lead document and any attached documents or orders. If you want to upload a document that wasn't assembled by TXdocs you can click on the button Add Other Document to open the upload download tool (Click here to go through Uploading eFiling). Step 2 also allows for the user to add an additional lead documents or merge lead documents. Files assembled in TXdocs will be converted to a pdf format during the filing process.



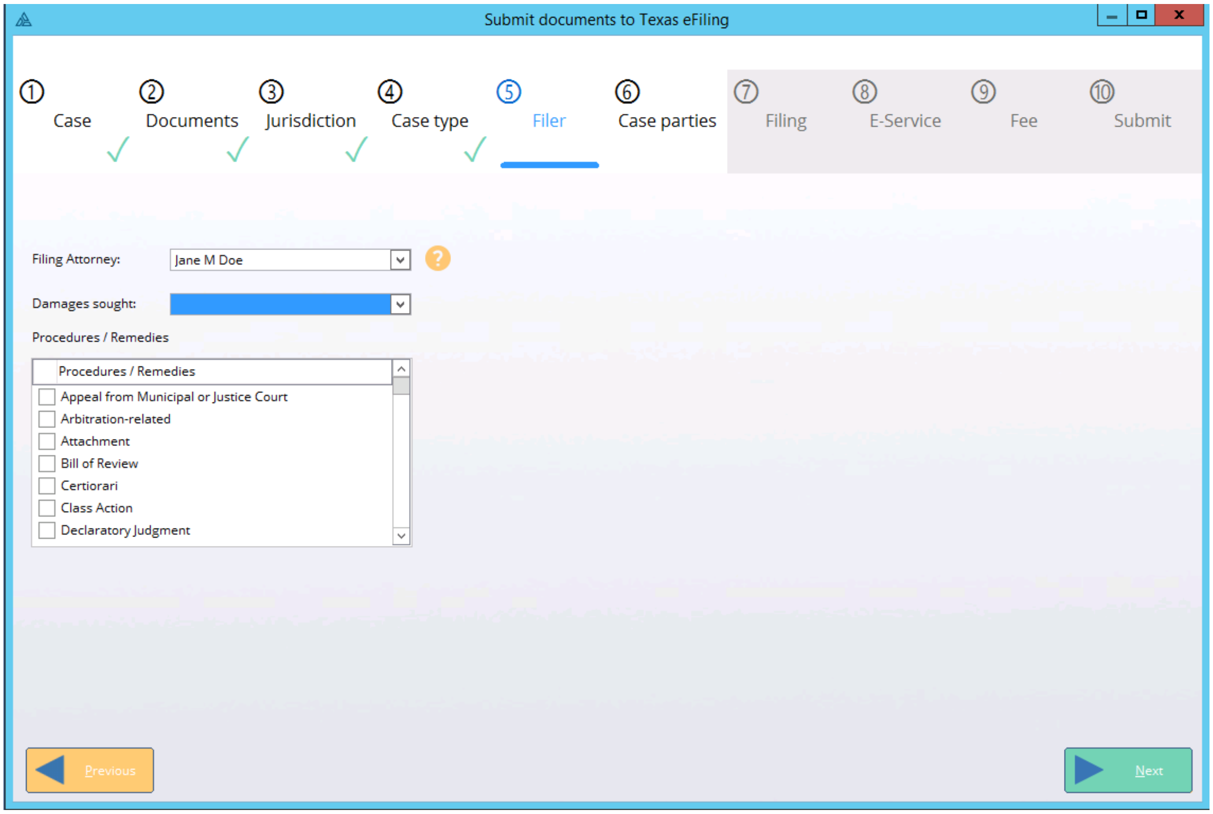
Step 3. Set the jurisdiction of the court. If the lead document was assembled in TXdocs we will pull from the case answers to auto input the jurisdiction information. Please review that you are in the correct district and then click next. When eFiling into an existing case to the right of the jurisdiction screen will be a question asking to search by cause number or by party name.



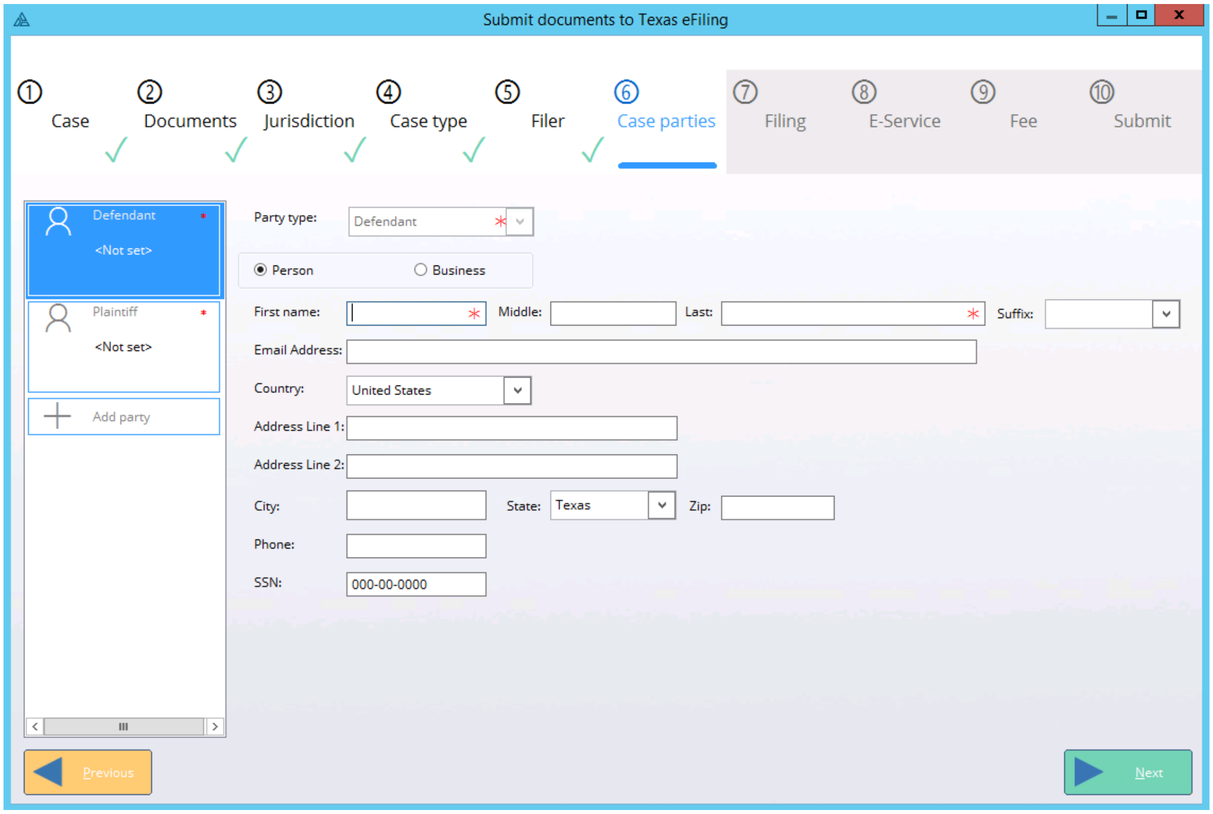
Step 4. Select the category and case type for the document. NOTE: some documents assembled through TXdocs have been set up to filter out unrelated categories. If you are running a Petition for divorce we will only show the family law categories for the jurisdiction. Alternatively, if the document has been upload into our efiling system then we will list all categories for the jurisdiction.



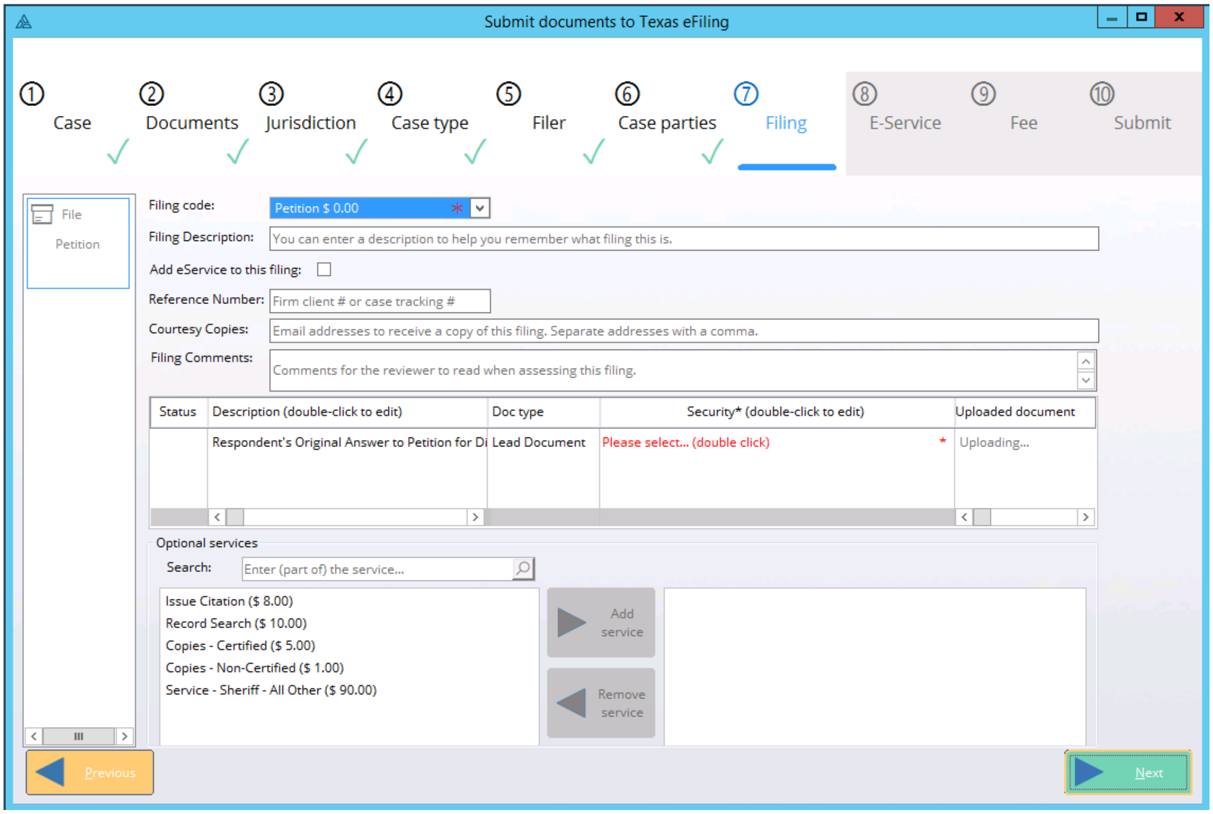
Step 5. Insert any filer information. For some cases damage sought will appear as a drop-down item.



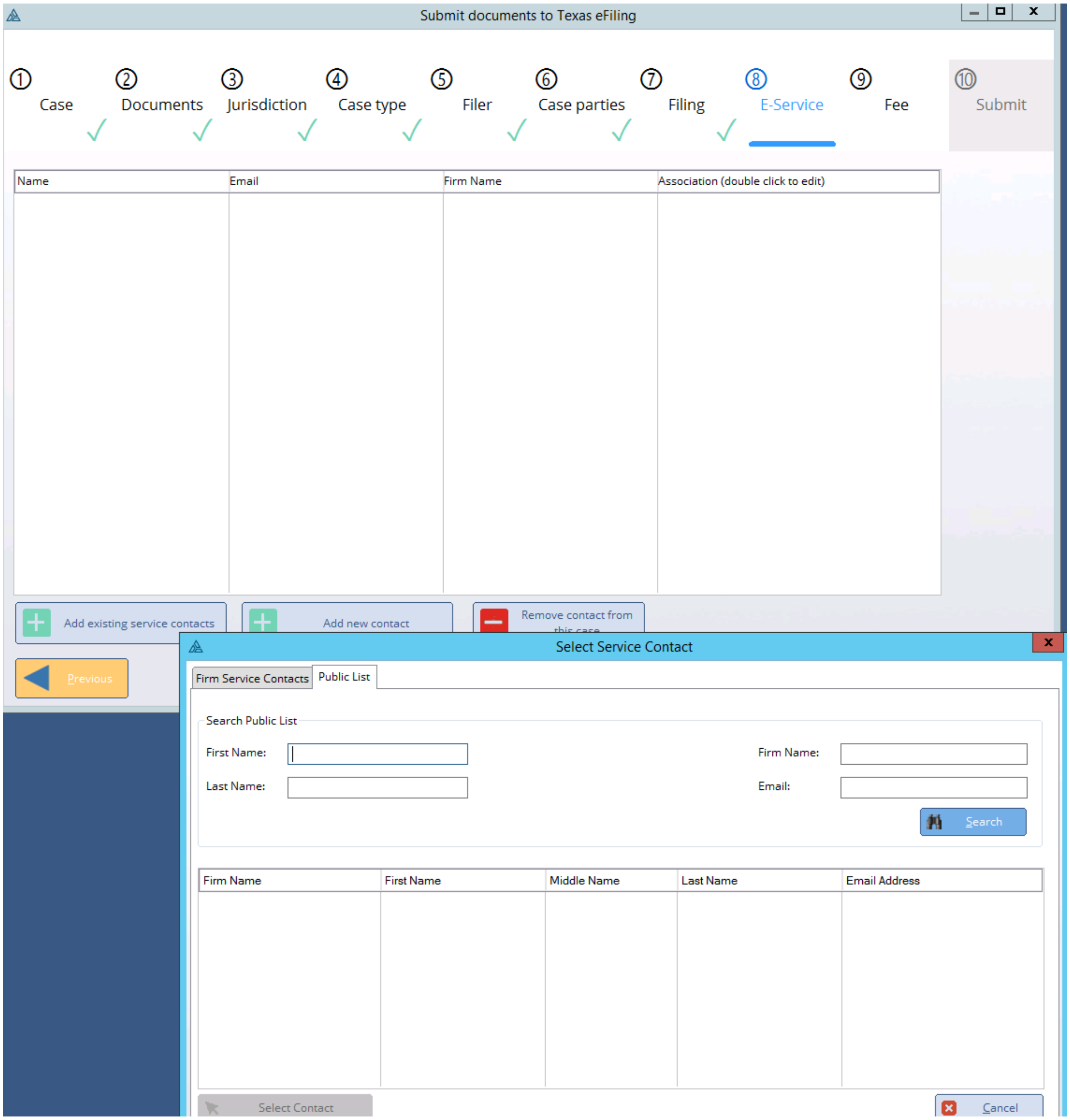
Step 6. You can add edit and deleted parties for the case. Depending on your previous answer choice we will filter the appropriate party type for your filing and based on your case answers we will input your parties information.



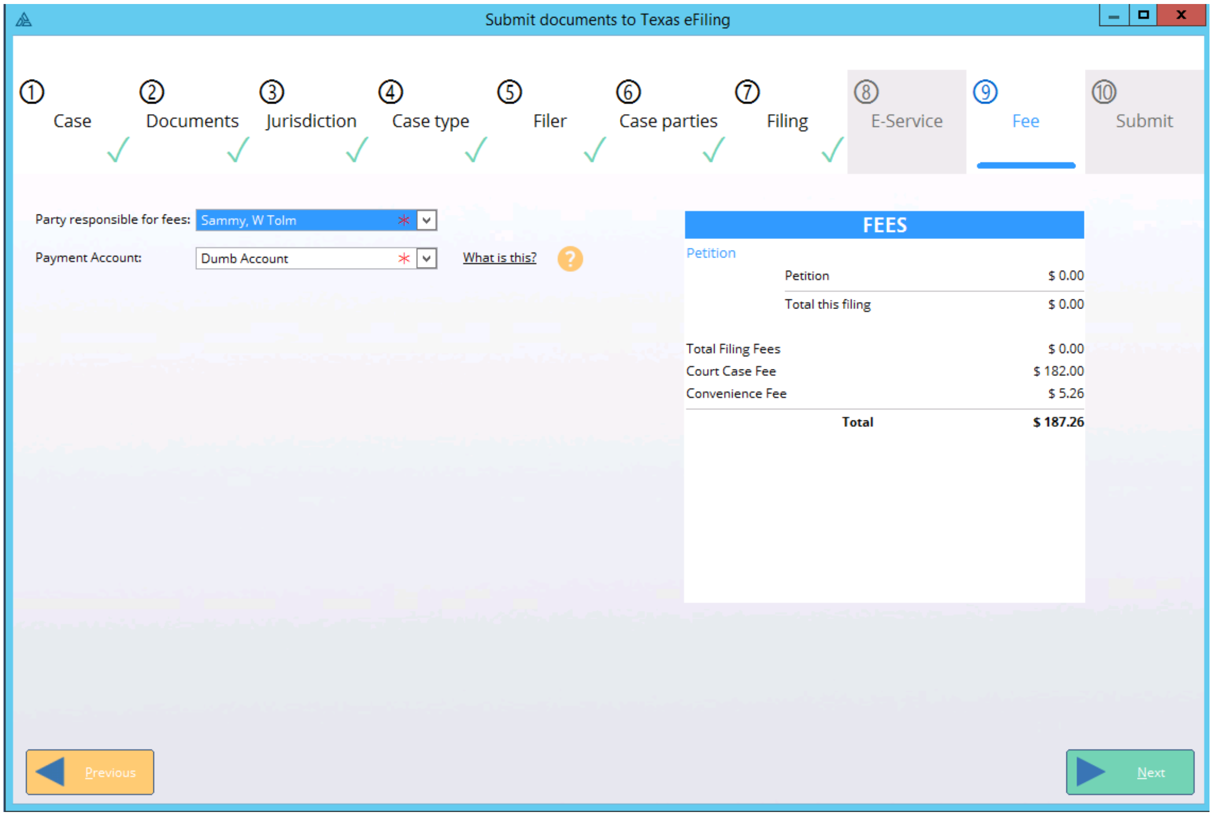
Step 7. Select your filings code, the name of the lead document will be inserted as the filing description, but this can be changed if necessary. If necessary you can add an eService to this filing. When a document is an upload we will check the document for embedded text, length and other complication which could have the filing rejected. When you have filled out the information above the table please be sure to double click on the documents security to mark if it has sensitive information. After a document has been uploaded the files will have a green check box this means that you can click on next to go to the fees page or the eservice page. If you see an exclamation point this means that the document was converted from its original file type to a pdf. You can check the pdf to see how things look and if you need to make any adjustments by clicking on the documents name.



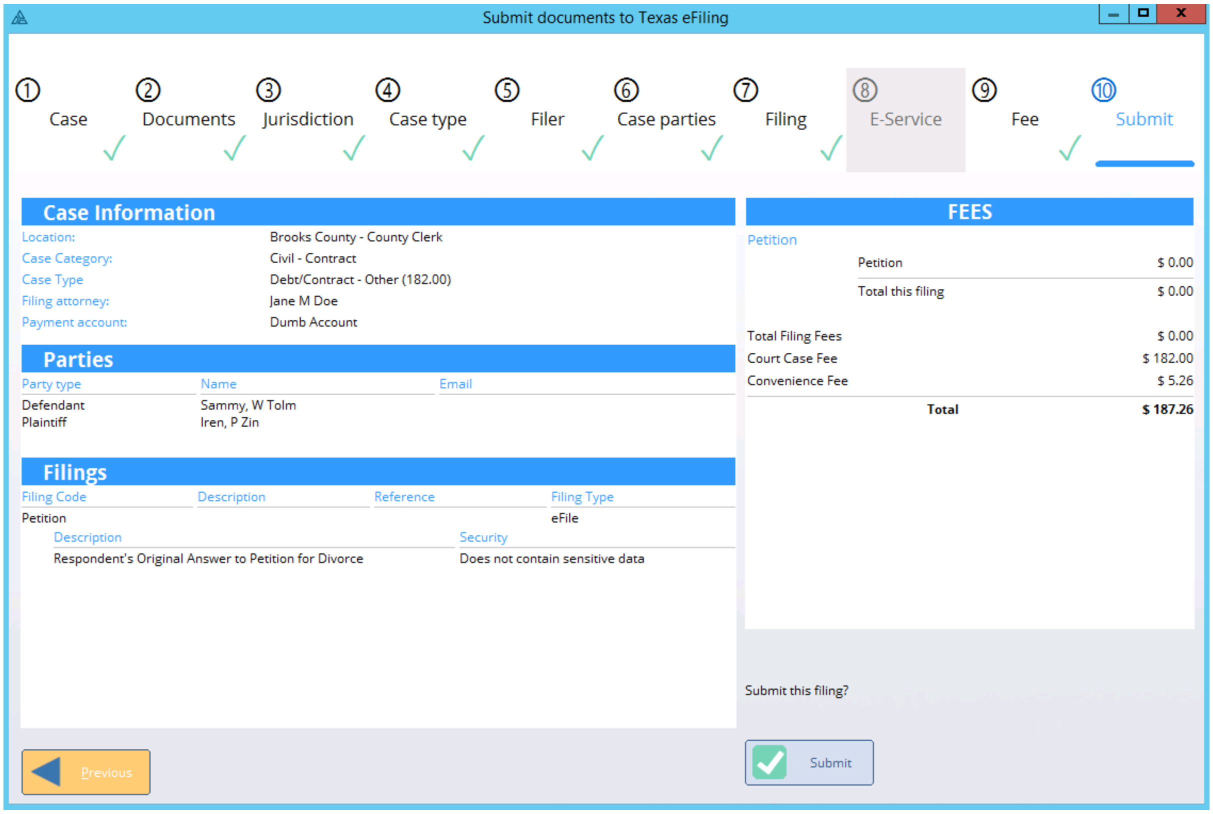
Step 8. If you didn't choose in step 7 to include an E-sevice screen you will be taken to step 9. Otherwise, on this screen, you can include an existing contact from your manage firm page, a public option, or alternatively, add a new E service contact.



Step 9. Upon completing the previous steps your payment will be calculated. In this window, you will be able to change who pays and what payment method should be used.

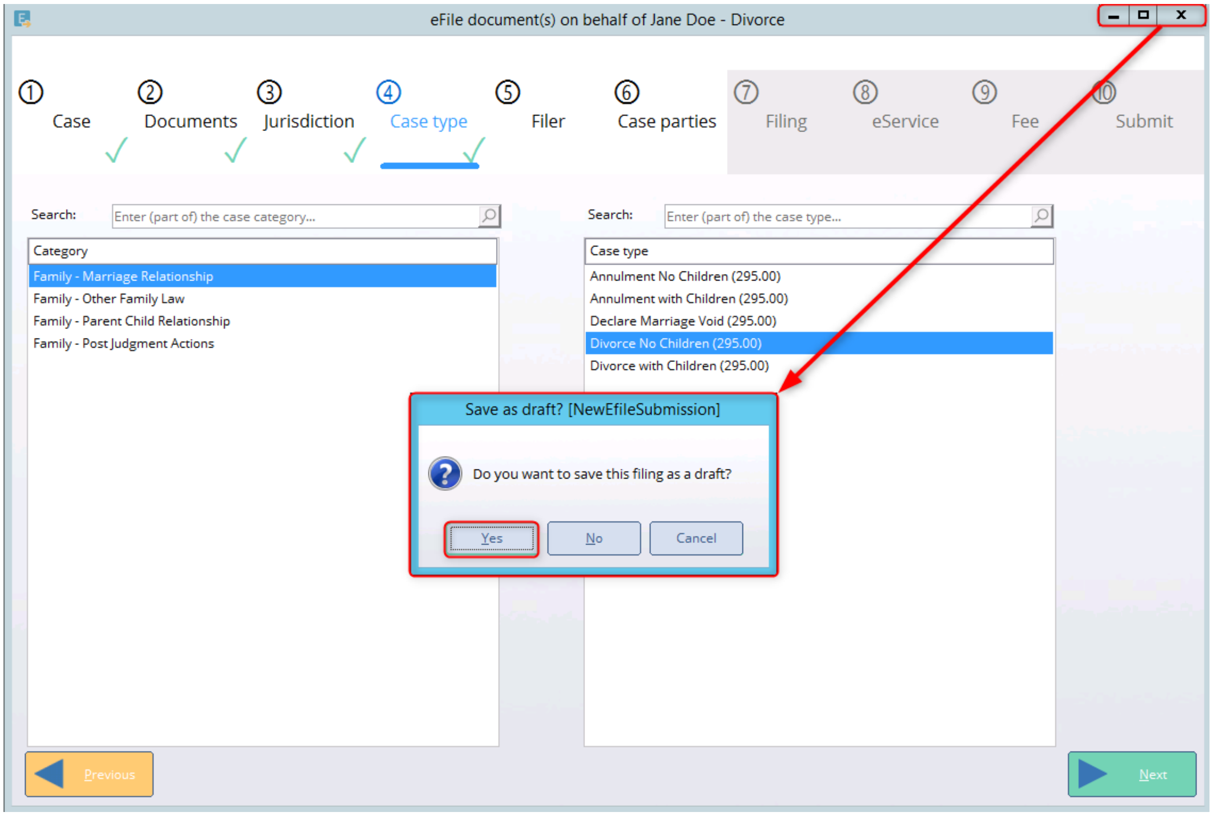


Step 10. The submit window will display all the information placed up to this point. Review then press on the green check box to finalize your filing.

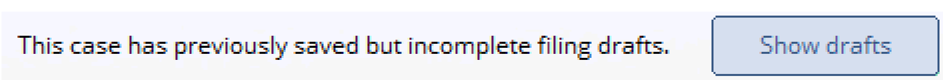


4.4 Recovering a Draft

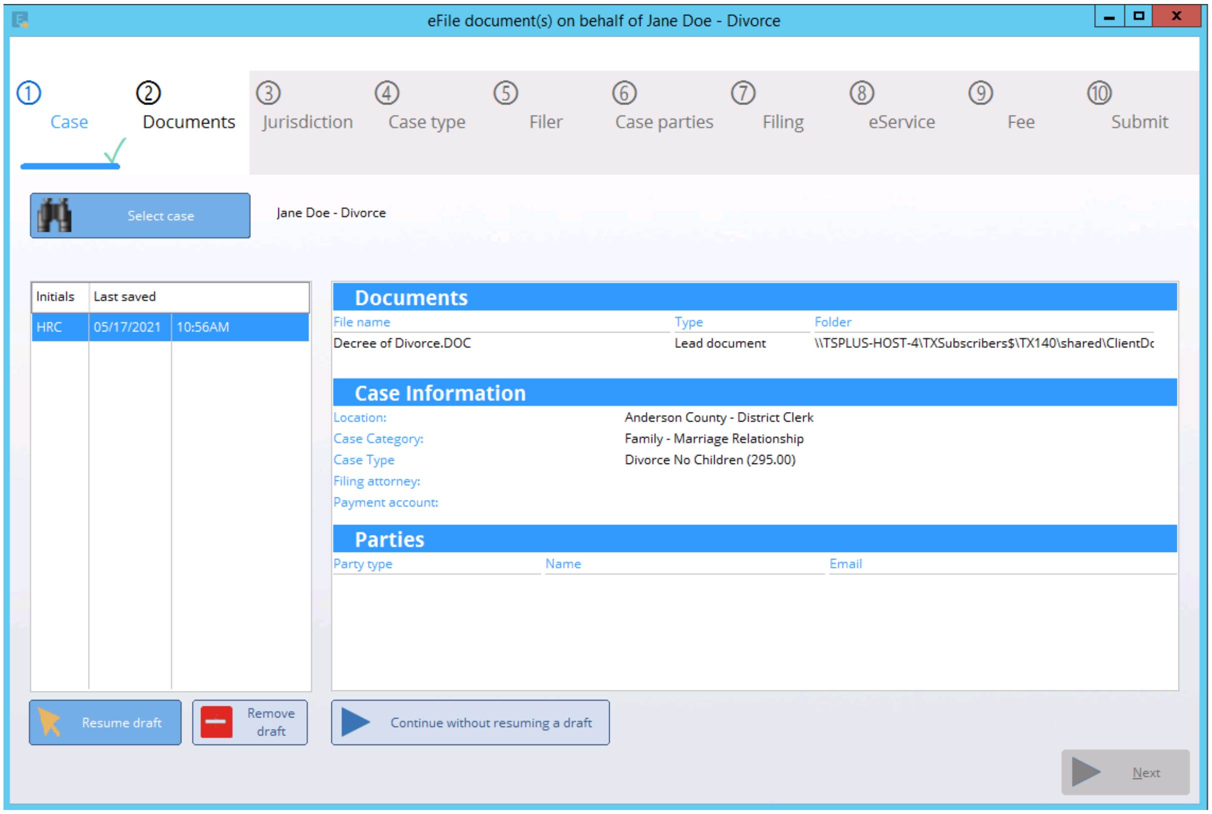
In some cases a efiling session can not be completed in a single run. If this happens you can chose to save the filing as a draft. A draft is a filing that has data in it, but has not been marked as submitted. To save a filing as a draft quit the efiling process (NOT TXdocs or the Anywhere tab) and select the option save draft.



After a draft has been created the information saved from your last efiling session will be saved to the case's draft page. When you are ready to pick up the filing again click on the eFile button and complete step 1 of the efiling procedure. A message will appear when the case and filing type has been selected asking if you want to continue with your previous draft.

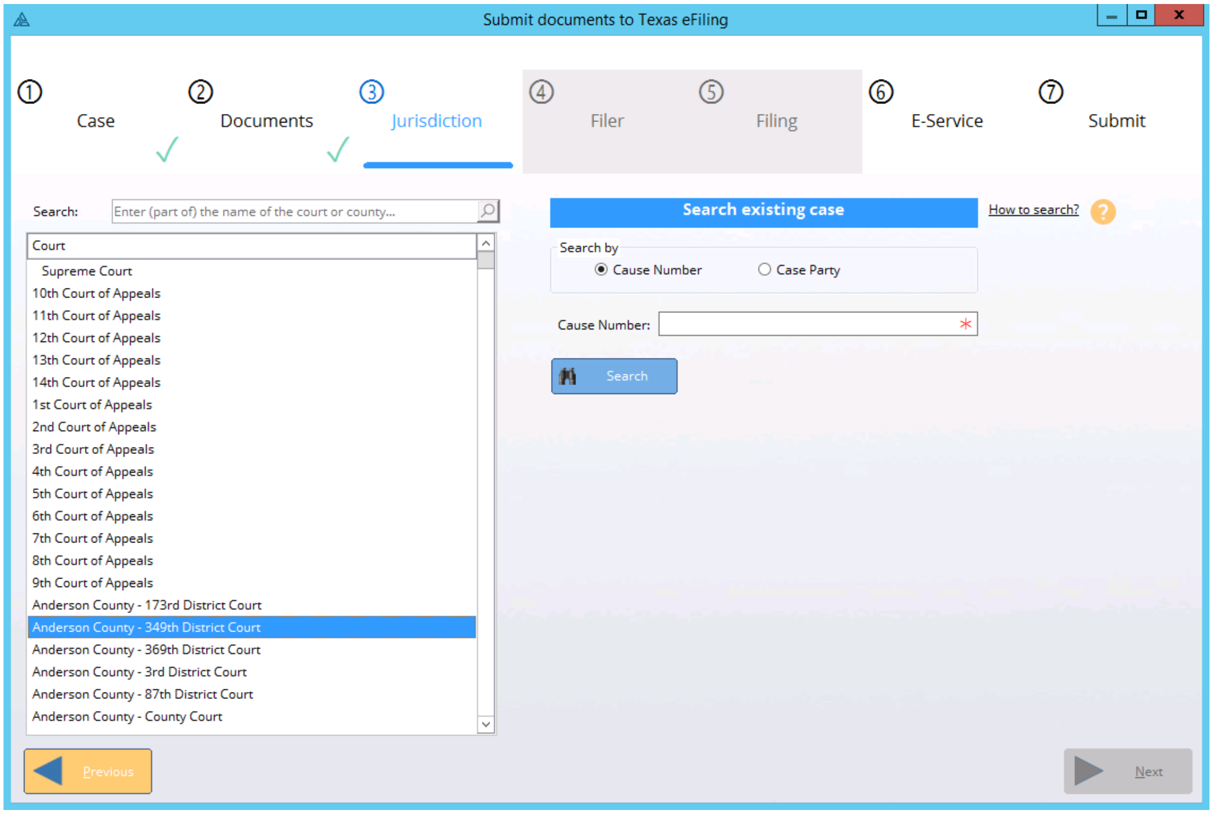


If selected you will be taken to the draft page. On the right hand window we will display the information recovered from the highlighted draft. On the left we will show when the draft was last saved. Select the save you want to continue with and click at the bottom left "Resume draft" to pick up where you left off. Alternatively, if you want to not select any of the save drafts click on the button called "Continue without resuming a draft" this will start you off on step 2. A draft will not be removed untill the filing has been complete or if the button "Remove draft" has been clicked.



4.5 Eservice

You can server to attorney or other attorneys that are connected to the serves. This is email that keeps a record in the court system. Got through the process of selecting a case and the required documentation. ON stage 3 you will need to have the cause number or party information available.



4.6 Uploading Efiling

Anywhere is on our secure servers meaning that users looking to download or upload documents from their computer must take steps to transfer data from their machine to our systems.

To Upload a Document

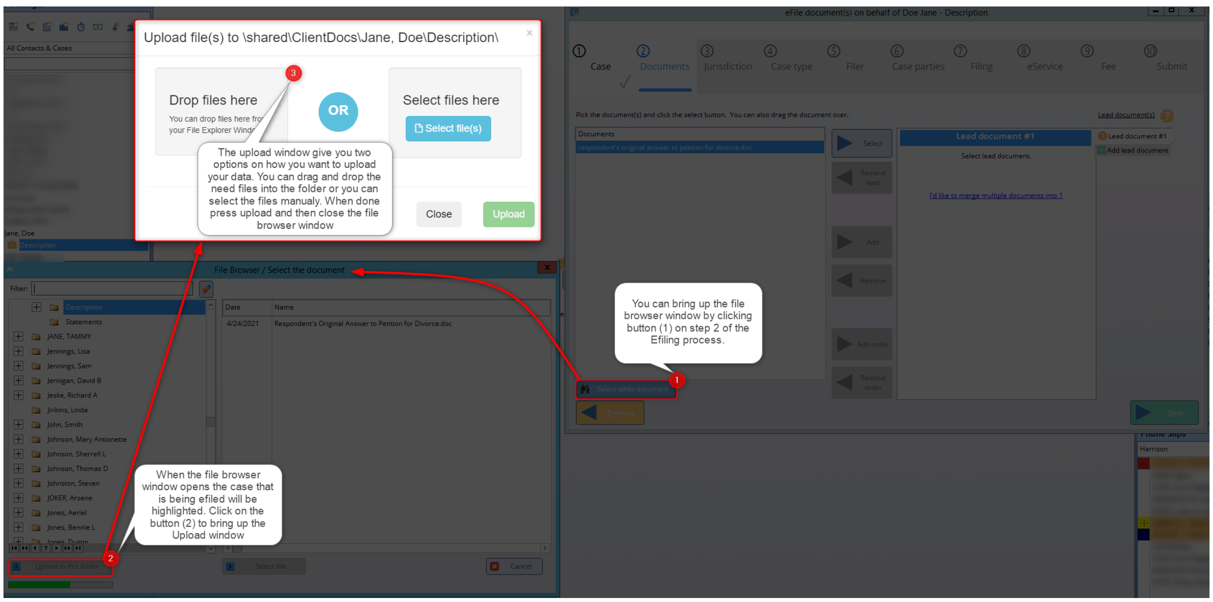
1. To do this you will need to use the "file browser tool" on step 2 of our efiling window. This is located at the bottom left of the effiling screen. Click on the button "Select other document". If the lead document has not been selected then the document uploaded will be marked as the lead. if there is a lead document then select then when you click on the button "Select other document" a drop down window will appear asking if the uploaded document is an alternative lead, attachment or proposed orders.

2. A window called File Browser will open. The left window will contain a list of client's and their associated cases while the right window will show a list of documents. Click on your clients case. if you do not see the case underneath the client please click on the plus button to the left of the client's name.

3. The upload button can be selected after you select the case you want to upload to.

4. Upon clicking upload you can drag a file from your computer to the drag and drop location or select from your computer files what documents you want to upload. we have a 1GB upload limit.

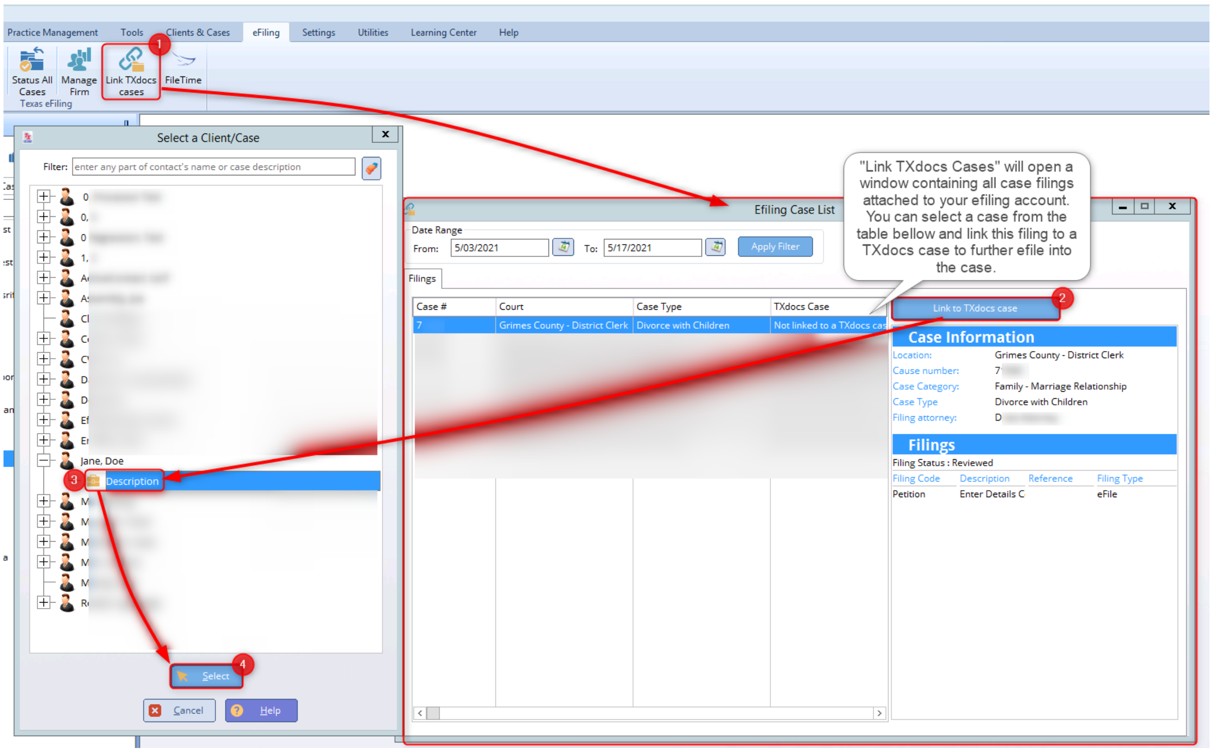
5. After files appear on the upload screen you can click upload to add these selected files from your machine to our Anywhere servers.



4.7 Case Status and Link

After login into your efiling account TXdocs will pull the old filing data into the program. This data will appear in both the "Status All Cases" and "Link TXdocs Cases" screens. This data is outside of TXdocs, but details regarding the case can be seen within the program. If this data matches a case that is currently in TXdocs you can link the efiling records to your contact and case.

To do this click on the button "Link TXdocs Cases" and select the efiling record with a single left click. Next click on link TXdocs case and chose the case description that this record should belong to. When complete the record will show in the "Case status" window and you can use the case window to perform additional filings.



The button for Case Status screen will display all filed case connected to your login credentials. You can attach cases filed outside of TXdocs by selecting the button link to TXdocs. Each filing will list its current status. We have 4 status types:

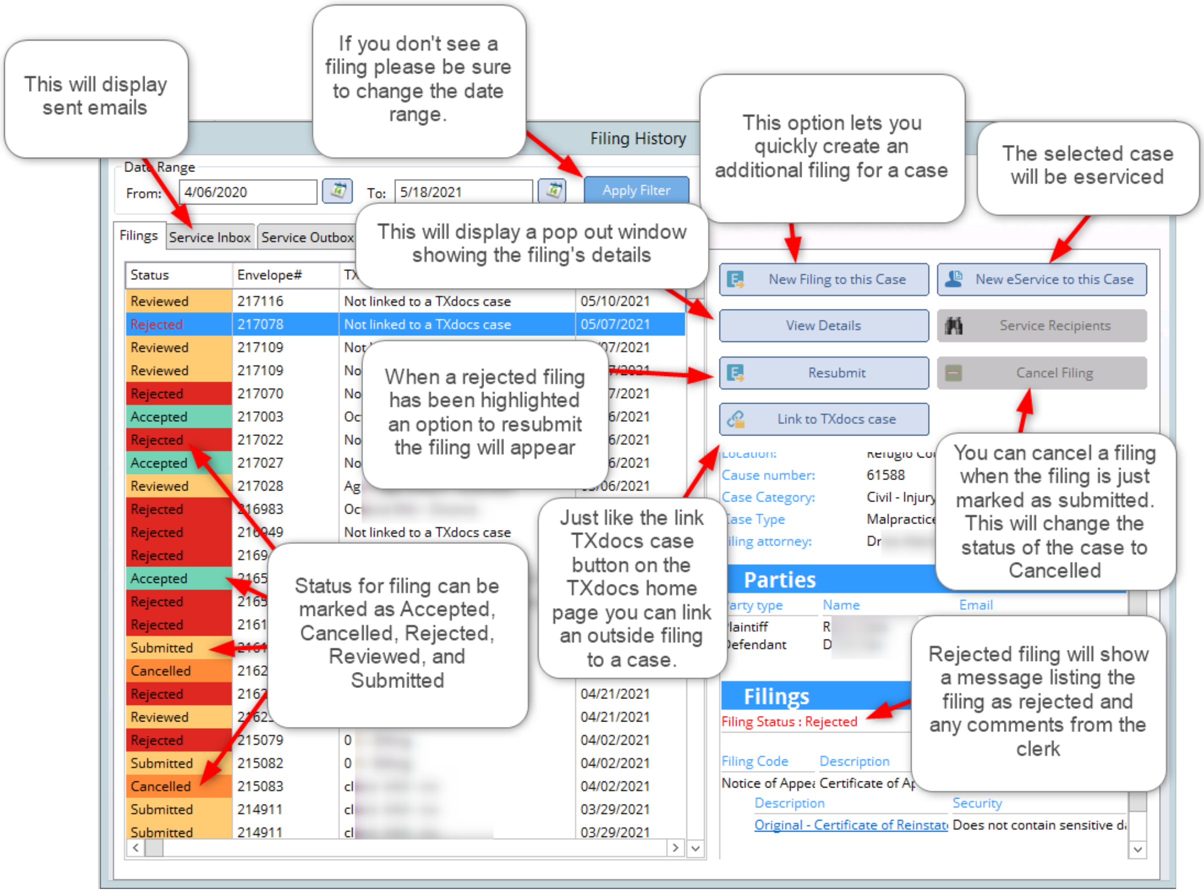
1. Submitted - After creating a filing within TXdocs the file will be listed as submitted. This means that it will be in the clerks queue.

2. Cancelled - This is a submitted filing you have rejected. To rejected a filing click on the cancel filing button to the right of the case status screen.

3. Rejected - This is a filing that the clerk has sent back. You can review the reason for rejection by selecting the case and looking at the comments or viewing details.

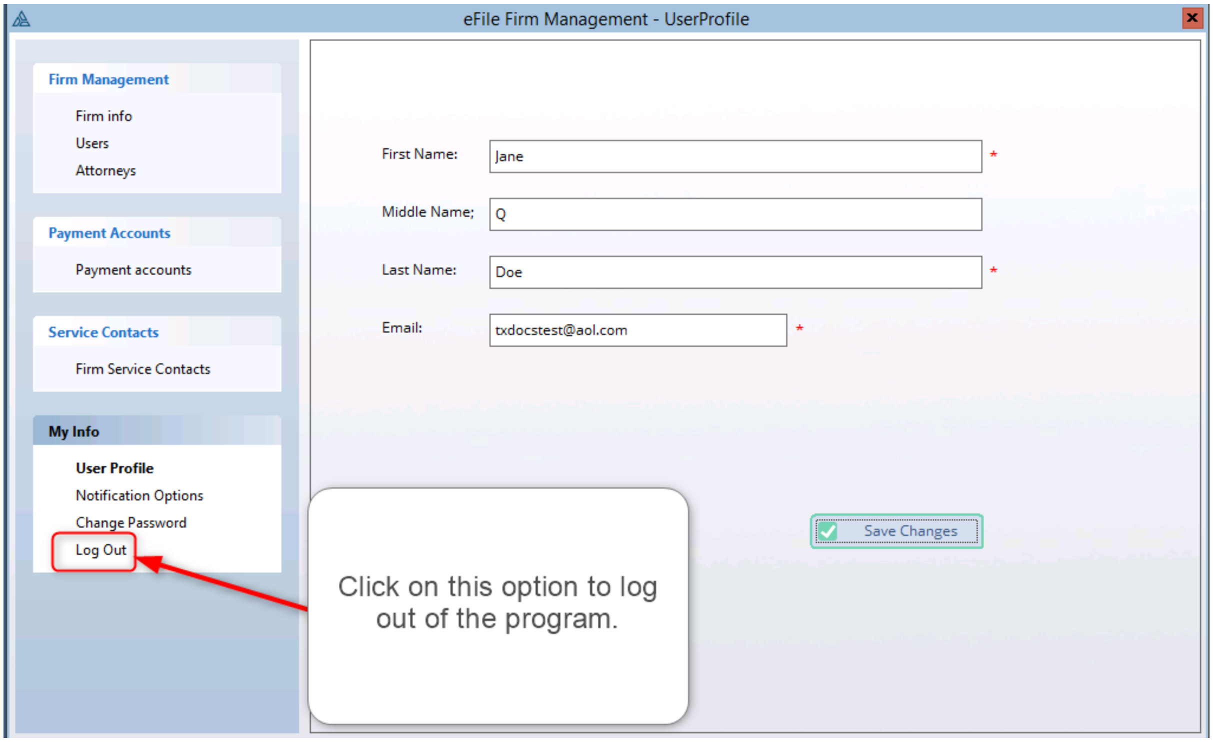
4. Review - This is a submitted filing that the clerk has begun to accept.

5. Accepted - This is a Reviewed filing that has been accepted by the court.

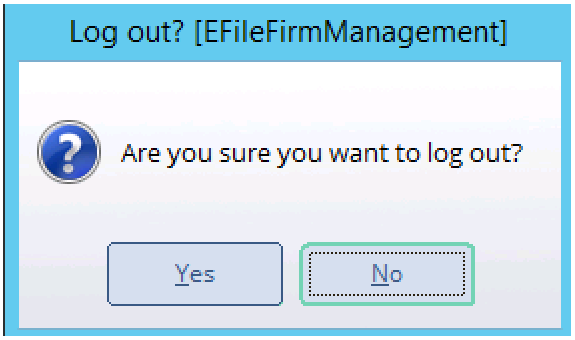


4.8 Efiling Logout

Some of our user need to login to an alternative firm to complete their efiling. To do this you will need to log out within the firm management screen.



If the option to Log Out has been clicked a secondary window will appear asking if you are sure you want to log out. Click on yes to confirm your intent to log out. Afterward you will be taken back to the register firm screen where you can choose to login with an alternative account.



TXdocs Tools

5 TXdocs Tools

5.1 Family Law Tools

TXdocs subscriptions include quite a few special software tools to help with tasks in your family law practice. If you will take the time to get familiar with them they will save you a lot of time.

5.1.1 Child Support Obligation Calculator

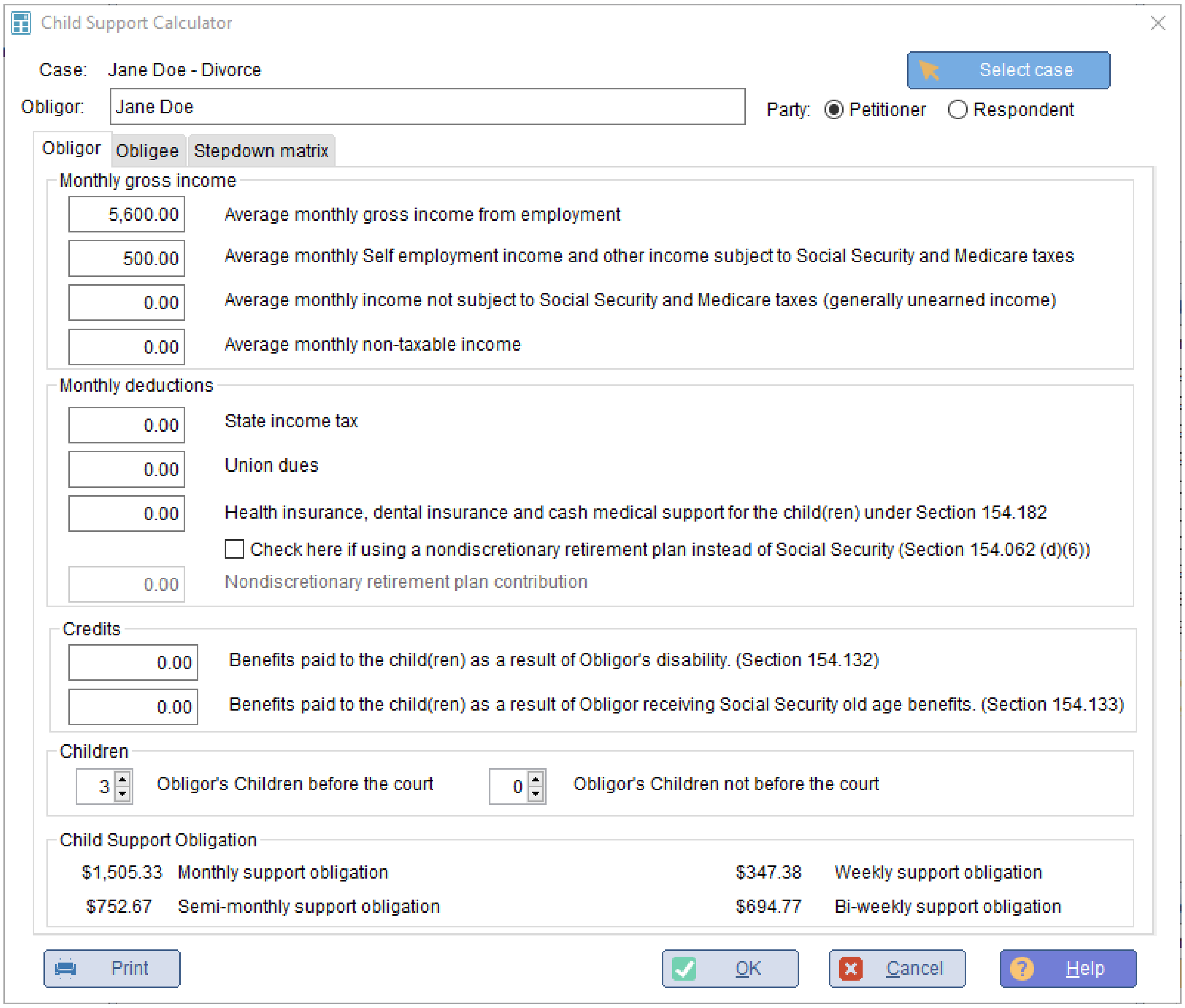
The child support calculator is available under Tools on the main menu.

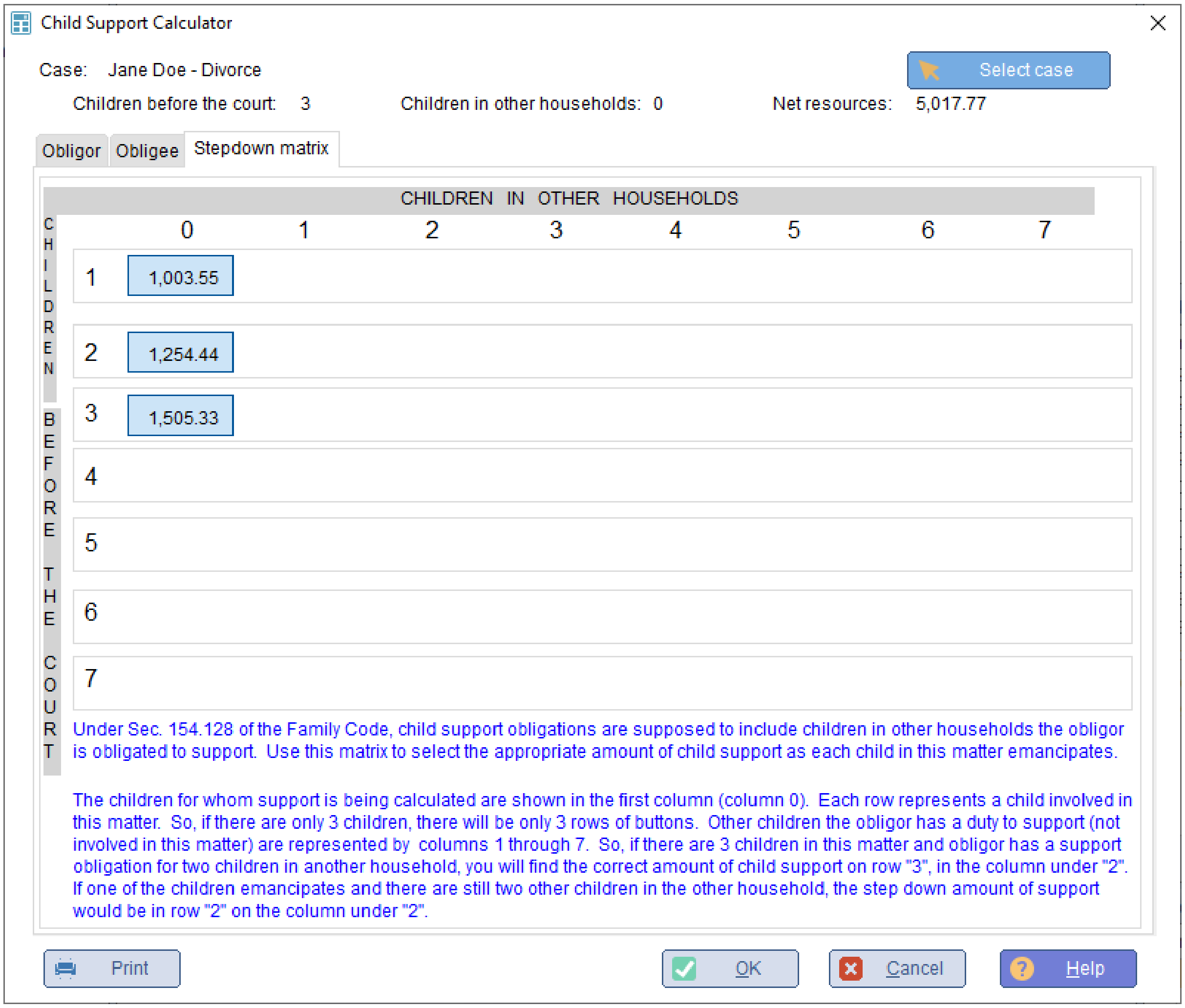
TXdocs makes calculating child support simple. You enter information and TXdocs factors in monthly gross income, deductions and credits, and calculates the obligation. While the primary purpose of the tool is to calculate a person's child support obligatiion, you can also use it to calculate the obligee's net resources. This is occasionally necessary under Section 154.130 of the Texas Family Code.

Note the third tab on the window labeled Stepdown matrix. This tab shows each reduced obligation amount as a child is emancipated.

For a detailed description of how the calculations are made using the Texas Family Code, read How Child Support is Calculated.

As you fill in the blanks, TXdocs automatically calculates and displays the statutory child support obligation. If you selected a case using the button at the top of the window, your information will be saved when you click OK.


Child Support Calculator
Case: Jane Doe - Divorce
Select case
Obligor: Jane Doe
Party: Petitioner Respondent
Obligor Obligee Stepdown matrix
Monthly gross income
5,600.00 Average monthly gross income from employment
500.00 Average monthly Self employment income and other income subject to Social Security and Medicare taxes
0.00 Average monthly income not subject to Social Security and Medicare taxes (generally unearned income)
0.00 Average monthly non-taxable income
Monthly deductions
0.00 State income tax
0.00 Union dues
0.00 Health insurance, dental insurance and cash medical support for the child(ren) under Section 154.182
Check here if using a nondiscretionary retirement plan instead of Social Security (Section 154.062 (d)(6))
0.00 Nondiscretionary retirement plan contribution
Credits
0.00 Benefits paid to the child(ren) as a result of Obligor's disability. (Section 154.132)
0.00 Benefits paid to the child(ren) as a result of Obligor receiving Social Security old age benefits. (Section 154.133)
Children
3 Obligor's Children before the court
0 Obligor's Children not before the court
Child Support Obligation
$1,505.33 Monthly support obligation
$347.38 Weekly support obligation
$752.67 Semi-monthly support obligation
$694.77 Bi-weekly support obligation
Print
OK
Cancel
Help



5.1.2 How Child Support is Calculated

Texas Family Code Section 154.062 specifies how to calculate Net Resources of the obligor.

Section 154.062(a) states, "The court shall calculate net resources for the purpose of determining child support liability as provided by this section."

Income to Include in Net Resources - Section 154.062(b): Basically, it is all income of except those items specifically excluded in subsection (c). [Note: (b)(5) does exclude social security supplemental income and certain veteran's benefits.] Subsection (c) excludes the following from resources (1) return on principal or capital; (2) accounts receivable; (3) benefits paid under Temporary Assistance for Needy Families (TANF) and (4) payments for foster child care.

Deductions from Resources to Determine Net Resources: The court shall deduct the following items from resources to determine net resources available for child support:

1. Social security taxes
2. Federal income tax based on the tax rate for a single person claiming one personal exemption and the standard deduction
3. Accounts receivable
4. State income tax
5. Union dues
6. Expenses for the cost of health insurance or cash medical support ordered under Section 154.182 (Further defined in Section 154.062(e))
7. Non-discretionary retirement plan contributions (if the obligor does not pay social security taxes) (Further defined in Section 154.062(f))

Using the Attorney General's Tax Charts

TXdocs uses two charts for calculating net income after deducting social security taxes and federal income taxes published by the Texas Attorney General: one for Employed Persons and another for Self-Employed Persons.

It is not clear from the Family Code or from case law how to apply the charts in situations where the obligor has income from both employment and self-employment. And what happens if the obligor also has income that is subject to neither social security nor income taxes?

Since the charts list specific amounts for social security taxes, it is possible to use the charts to calculate net after tax income for amounts not subject to social security. Of course, for income exempt from social security and income taxes, we would simply use the gross amount.

Case law has examples of calculating support by simply totaling all of the obligor's income into one of the two tax chart categories (income from employment or income from self-employment). Using this method, the same tax rates are applied to all income regardless of its source.

TXdocs provides a way to apply different tax rates for different sources of income. The recognized sources are:

1. Income from employment (No clarification needed)
2. Income from self-employment (No clarification needed)
3. Income not subject to social security (i.e. unearned income). We use the self-employed tax chart to determine how much to deduct from the gross for federal income tax but we do not deduct the social security amounts.
4. Income not subject to social security or federal income tax (i.e. military allowances). For these items, the total gross amount is added to Resources.

Note: *If you enter two or more income sources for the Obligor, TXdocs will treat each item separately and calculate the net after tax income as provided above.*

Applying the Tax Charts: The tax charts are lists which show the amount of social security taxes and federal income tax deducted from a specific amount of gross income to get net income. The list typically displays income brackets in increments of $100 and $500. Almost always, the actual income falls between the amounts listed in the charts. For example, suppose a person has employment income of $3,127.00.

The 2021 tax charts provide social security and income tax for our example incomes of $3,100 and for $3,200.

Social Security

Gross Wages	Old Age	Medicare	Federal Income Tax
3,100	192.20	44.95	229.92
3,200	198.40	46.40	241.92

To calculate social security and federal income tax for $3,127, we have to extrapolate as follows:

1. Net Income on $3,100
   Old Age Survivors and Disability Insurance: 192.20
   Medicare: 44.95
   Federal Income Tax: 229.92
   Net on $3,100: 3,100 - 192.20 - 44.95 – 229.92 = 2,632.93

2. Net Income on $27 (3,127 - 3,100)
   Old Age: 198.40 - 192.20 = 6.20
   Medicare: 46.40 - 44.95 = 1.45
   Income Tax: 241.92 – 229.92 = 12.00
   19.65

At this point, we know there is an additional $19.65 in social security and income taxes deducted between the $3,100 income bracket and the $3,200 bracket. The following equation determines how much social security and income tax is deducted for every dollar over $3,100.

3,200
-3,100

100

19.65/100 = .1965

Social security and income tax on $27:   27 * .1965 = 5.3055
Net on $27: 27 – 5.306 = 21.694

3. Net resources: 2,632.93 + 21.70 = $2,654.63

For income not subject to social security taxes, apply the above formula but only deduct federal income tax.

Applying the Child Support Guidelines

·Section 154.125 applies if obligor has children in this one household.
·Section 154.128 has a primary application and an alternative application if obligor has children in more than one household.

After calculating Net Resources available for child support, the Code's guidelines provide percentages to apply to the Net Resources to determine the child support obligation. It provides percentages to apply to Net Resources depending on the number of children being supported by the obligor.

Children in One Household:

Section 154.125(b) provides the following guidelines when the obligor only has children in one household, and the net resources of the obligor are at least $1000 per month:

·1 child: 20%,* net resources
·2 children: 25%, * net resources
·3 children: 30%, * net resources
·4 children: 35%, * net resources

·5 children: 40%, * net resources
·6+ children: No less than five children

Section 154.125(c) provides the following guidelines when the obligor only has children in one household, and the net resources of the obligor are less than $1000 per month:

·1 child: 15%,* net resources
·2 children: 20%, * net resources
·3 children: 25%, * net resources
·4 children: 30%, * net resources
·5 children: 35%, * net resources
·6+ children: No less than five children

Children in Multiple Households:

Section 154.128 provides guidelines for computing the obligation when the obligor has children in more than one household. The steps for calculating the obligation are:

1. Determine the amount that would be ordered if all children whom the obligor has a legal duty to support lived in one household.
2. Divide the obligation calculated in the above sentence by the total number of obligor's children.
3. Calculate a child support credit by multiplying the per child amount calculated in the previous sentence by the number of obligor's children who are not before the court.
4. Adjust Net Resources by deducting the child support credit calculated in the preceeding sentence.
5. Calculate the child support obligation by applying the guideline percentages to the adjusted Net Resources calculated in the previous sentence.

Section 154.129 provides an alternative method of computing support when obligor has children in multiple households. It provides two tables showing the percentages to be applied for any combination of seven children in multiple households; one for net resources below $1000 per month and another for net resources totaling $1000 or more. TXdocs provides the result of this approach and the approach described in Section 154.128.

Calculating and Applying Child Support Credits

The Family Code provides two credits which may be deducted from the child support obligation calculated above.

·Section 154.132 Children of Certain Disabled Obligors: If any of the children for whom support is being calculated are receiving benefits as a result of a disabled obligor, then the amount/value of the benefits being received by the child(ren) is deducted from obligor's child support obligation.

·Section 154.133 Children of Obligors Receiving Social Security: If any of the children for whom support is being calculated are receiving social security benefits because obligor is receiving social security old age benefits, then the amount/value of those benefits being received by the child(ren) is deducted from obligor's child support obligation.

5.1.3 Inventory

The divorce inventory tool can be reached by two ways. You can click on it under the Tools main menu, or you will reach it while assembling an Inventory during a normal document assembly session. The only difference is, a few different buttons are visible, depending on which way you start the Inventory.

Add, Edit, Delete - To add, edit or delete an item, highlight the item's category (or an item already in that category) and click the appropriate button at the bottom. Alternatively, double click on a category to add an item to that category or right click on the category and a menu will pop up.

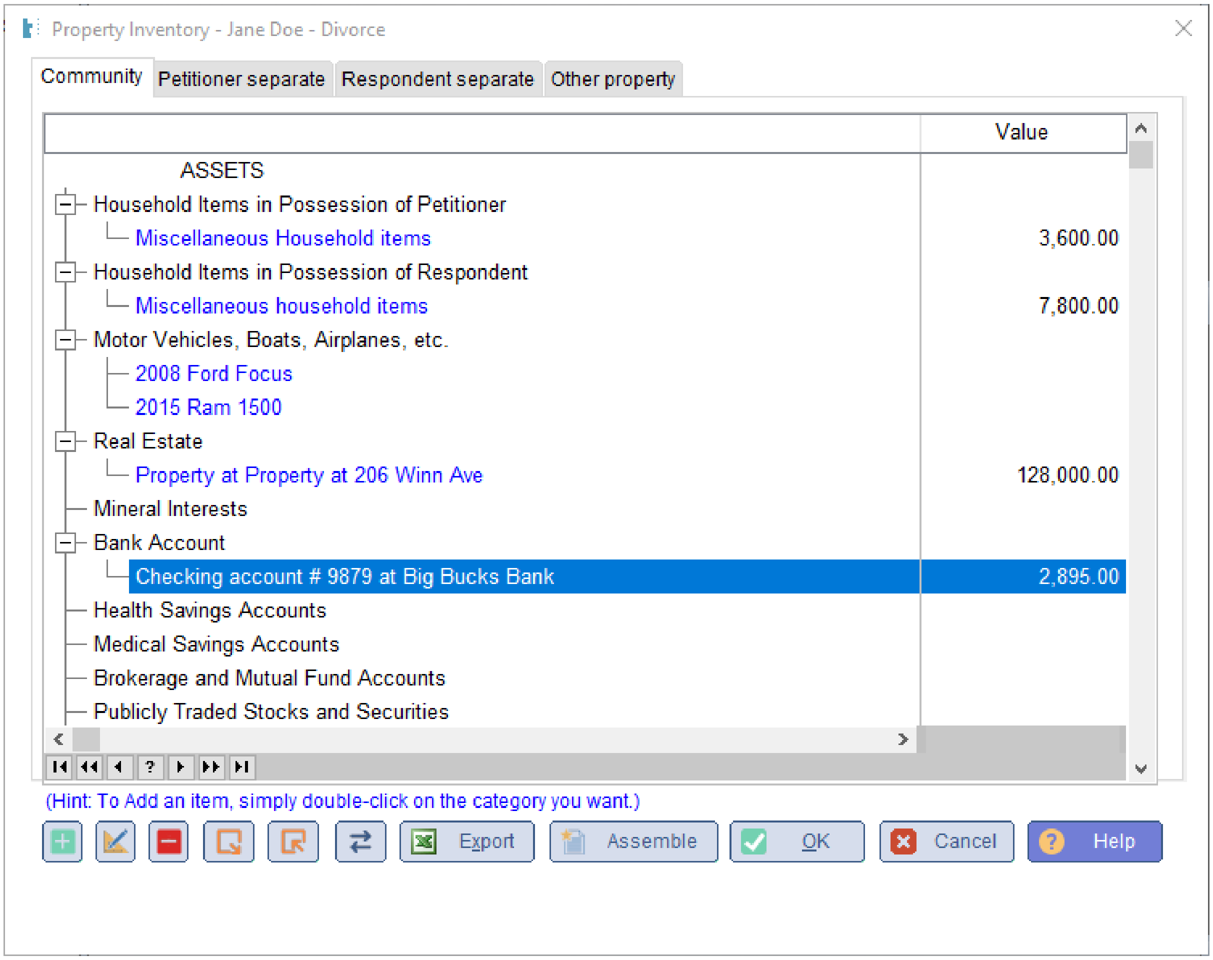
Collapse - this button will hide all items in the list so that only the categories are visible

Expand - this button will cause all of the items to be displayed

Export - this button will export the inventory into an Excel spreadsheet

Assemble - If you open the inventory from the Tools menu, click the button to begin assembling the inventory document.

Close - only visible when you open from the Tools menu, this button will save you work and close the Inventory.



5.1.4 Delinquent Child Support Calc

The Delinquency Calculator is used to calculate the total amount of principal and interest remaining due for child support, child support judgments, and costs by an obligor. Calculations are performed using the requirements in the Texas Family Code. To open the calculator, click Delinquency Calculator under the Tools main menu item or click the button in the Essentials Toolbox.

Support/Payments/Judgment/Costs - Click these buttons to add items to the list.

Edit - Click this button to edit the item that is highlighted in the list.

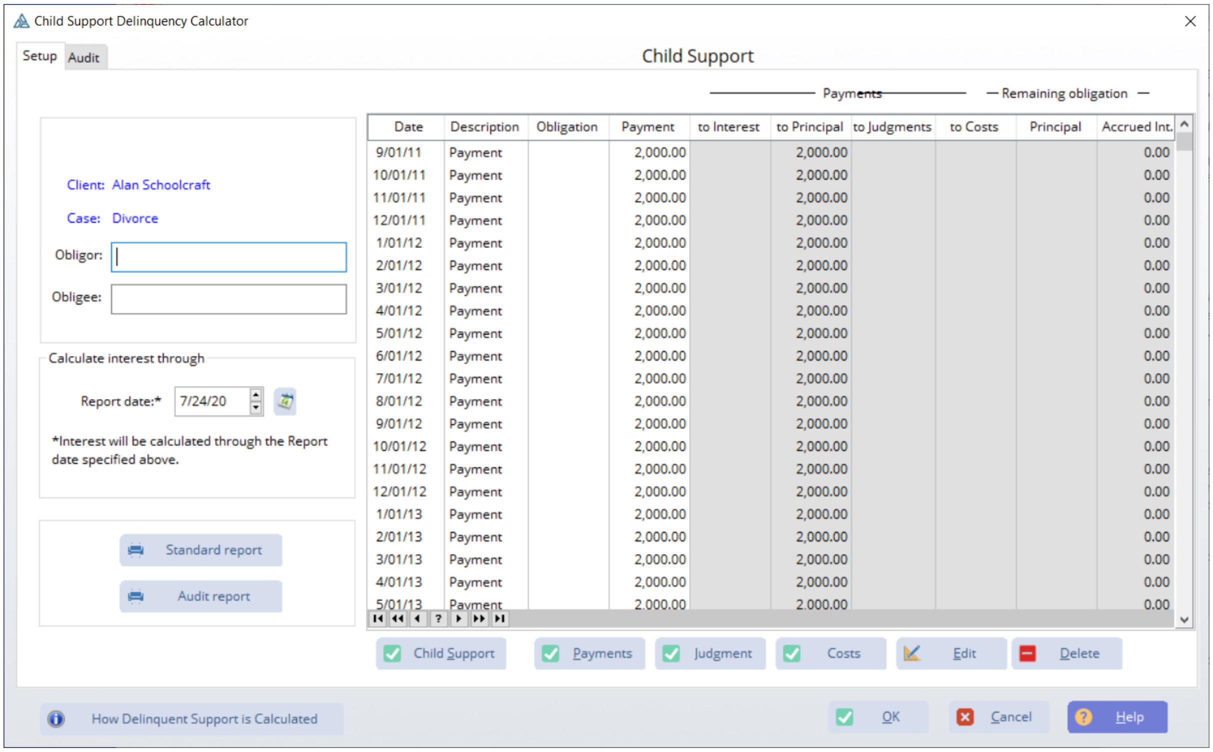
Delete - Click this button to delete the highlighted item.

Standard report - Click this button to view and then optionally print a simple report showing each item in the list along with totals.

Audit report - Click this button to view and then optionally print an extensive report showing each item in the list. You will see detailed information on how each payment is applied and how the remaining balance of each obligation, judgment and cost is determined.

PRINTING REPORTS: When you print a report, you will first be asked to select a printer. This selection will determine where the report is sent if you do print it. Next, you will be asked to select whether you want the report generated as Text, Print, or PDF. If you select Text, then, instead of printing, the report will be saved as a text file. If you select PDF, the report will be saved as a pdf document. If you select Print, then the report will be sent to your selected printer. Regardless of any of the previous selections, the report will always be displayed to you for viewing before printing or saving.

Audit Tab - this tab simply displays detailed information about obligations and payments, as well as totals.



5.1.5 How Delinquent support is calculated

EXPLANATION OF HOW CALCULATIONS ARE MADE BY TXdocs

HOW PAYMENTS ARE APPLIED

Payments made before Jan 1, 2010 - Applied in the following order of priority:
(1) Current Child support;
(2) Non-delinquent child support owed;
(3) Interest on principal amounts specified in subdivision (4) and (5);
(4) The principal amount of child support that has not been confirmed and reduced to money judgment;
(5) The principal amount of child support that has been confirmed and reduced to money judgment; and
(6) The amount of any ordered attorney fees or costs.

Payments made on or after Jan 1, 2010 - Applied in the following order of priority:
(1) Current child support;
(2) Non-delinquent child support owed;
(3) The principal amount of child support that has not been confirmed and reduced to money judgment;

(4) The principal amount of child support that has been confirmed and reduced to money judgment;
(5) Interest on the principal amounts specified in Subdivisions (3) and (4) ; and
(6) The amount of any ordered attorney fees or costs.

ACCRUAL OF INTEREST
Statutory requirements for calculating interest - Family Code Sec. 157.265 & 157.266.
Sept 1, 93 to Dec 31,01
12% simple interest whether or not reduced to judgment
6% simple interest
applies to -
a: payments becoming due on or after 1/01/02 and
b: Combined principal AND interest on support due before 1/01/02.

Judgment Call - it is unclear whether or not to add accrued interest to principal when applying interest at 6% after Jan 1, 02. TXdocs elected to not compound the interest this way.

IMPORTANT NOTE: Effective Jan 1, 2000, payments that become due on or after 01/01/00 interest accrues only on the portion of delinquent amounts that is greater than the monthly obligation. (Family Code sec. 157.265(a)).

5.1.6 Proposed Division Tool

The Proposed Division Tool lets you create different proposals for dividing assets and debts of the community estate. This window shows all assets and debts you entered while preparing an inventory for the case.

Add: Click this button to add an item to the list. (NOTE: it is a bit more efficient to just double-click on a category (like "Real Estate") to add an item in that category.

Edit: Highlight an item and click Edit to change information about that item.

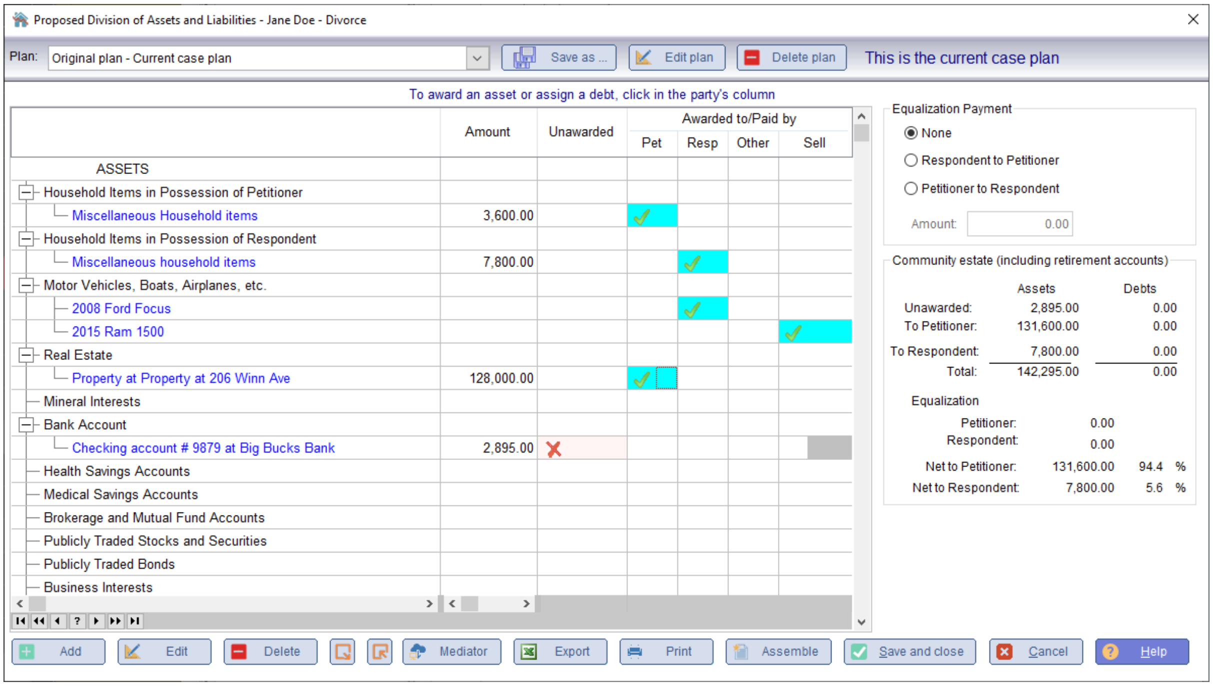
Delete: Highlight an item and click Delete to permanently delete it from the case.

Mediator: If you are working with a mediator who uses TXdocs' Mediator program, click this button to upload your proposed division to the mediator.

Export: Click this button to export the proposed division to an Excel spreadsheet.

Assemble: Click this button to assemble a Proposed Division document in TXdocs.

To assign an asset or debt to one of the parties, simply click on the appropriate column next to the item's description. You also choose to propose selling or otherwise disposing of the item by click in one of those columns. As you make assignments, the totals and percentages shown on the left side are immediately updated.



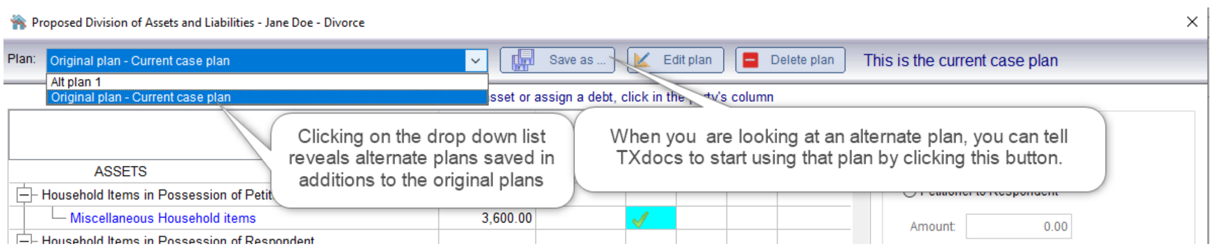
Creating Alternate Plans

You can create and save alternative proposals for dividing the estate. To create an alternative proposal, click the Save as... button at the top of the screen. Then enter a name for the plan you are working on and click OK. This create a copy of the plan you are working on and under the name you just entered.

TXdocs can only use one inventory plan to generate documents. If you create one or more alternate plans, you will have to tell TXdocs if you want it to use that plan for all future documents, including the decree. If you are working with a property division plan that is not the plan TXdocs knows to use, you will se a "Make this plan the case plan" button in the upper right corner. Click that button to tell TXdocs to start using this plan for all future documents.

If you click Assemble while viewing an alternate plan, TXdocs will assemble the Proposed Division using the alternate plan you are looking at. This gives you the ability to prepare multiple alternate proposals for presentation during negotiations.

IMPORTANT!!! (Make sure to save changes when creating new plans before closing the proposed division tool. Canceling before saving the changes will result in the changes taking effect for all plans and not just the plan changes were made to.)



5.1.7 Redactor

The Redactor is available under Tools/Family Law Tools on the main ribbon bar. It is designed to help you redact sensitive information from documents before you file them and have identified certain information that you may wish to redact from your filed documents. The Redactor will search your documents for that sensitive information and replace it with a mask.

Some information Redactor will redact include:

- Driver's license, passport, social security number, and tax id numbers;
- Bank account, credit card, and financial account numbers.
- Birth dates, home addresses, and the names of minors.

When you select a case and document. Redactor searches the case answers for sensitive information and then it searches for that information in the document. When the information is found, it is replaced with the designated mask. Redactor can process documents in .rtf, Word and WordPerfect formats.

1. Go to Tools/Redactor on the main menu to launch the Redactor.

2. Select a case.

3. Click the Document button to choose from a list of all documents you have assembled for the selected case. (Note: - on the window where you select the document, you can also browse to select a document you did not assemble in TXdocs.)

After you select a document, the list will display all answers in the case which the contain sensitive information.

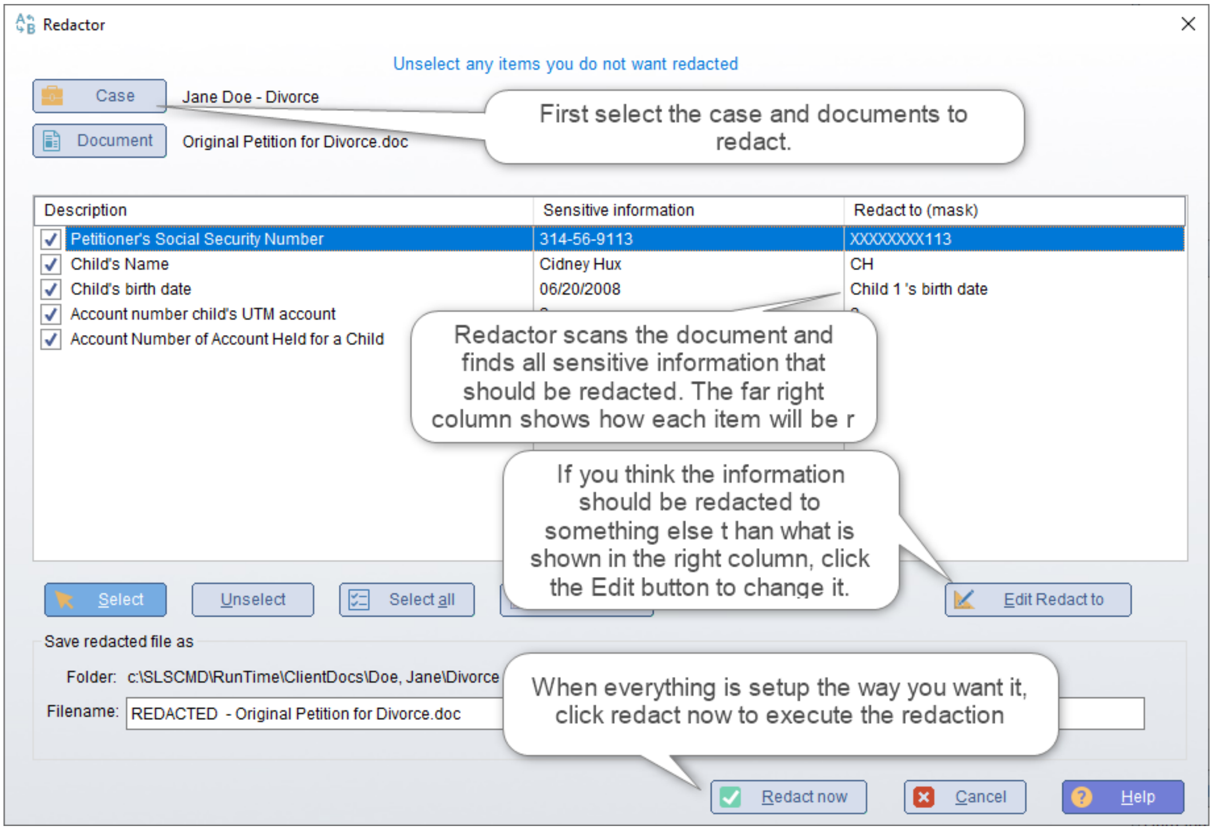
Select/Unselect/Select all/Unselect all - initially, all of the listed information will be selected for redaction. If, for any reason, you do not want Redactor to redact a particular answer, you can unselect it. Questions selected for redaction have a green checkmark in the left column.

Edit Redact to - The column on the right shows what each item will be redacted to. If you want to change that to some other mask, click the this button. You can then type in anything else you think the information should be redacted to. You can also double click the proposed redaction to edit it.

Filename - by default, Redactor will simply prepend "Redacted" to the filename of the document being redacted. If you wish, you can change this name.

Redact now: - click the Go button to perform the redaction.

NOTE: If your county or judge requires information to be redacted differently than the way TXdocs is setup to redact, you can change it. Use the [Customize Redactor](#) feature to tell TXdocs how you want your sensitive information redacted.



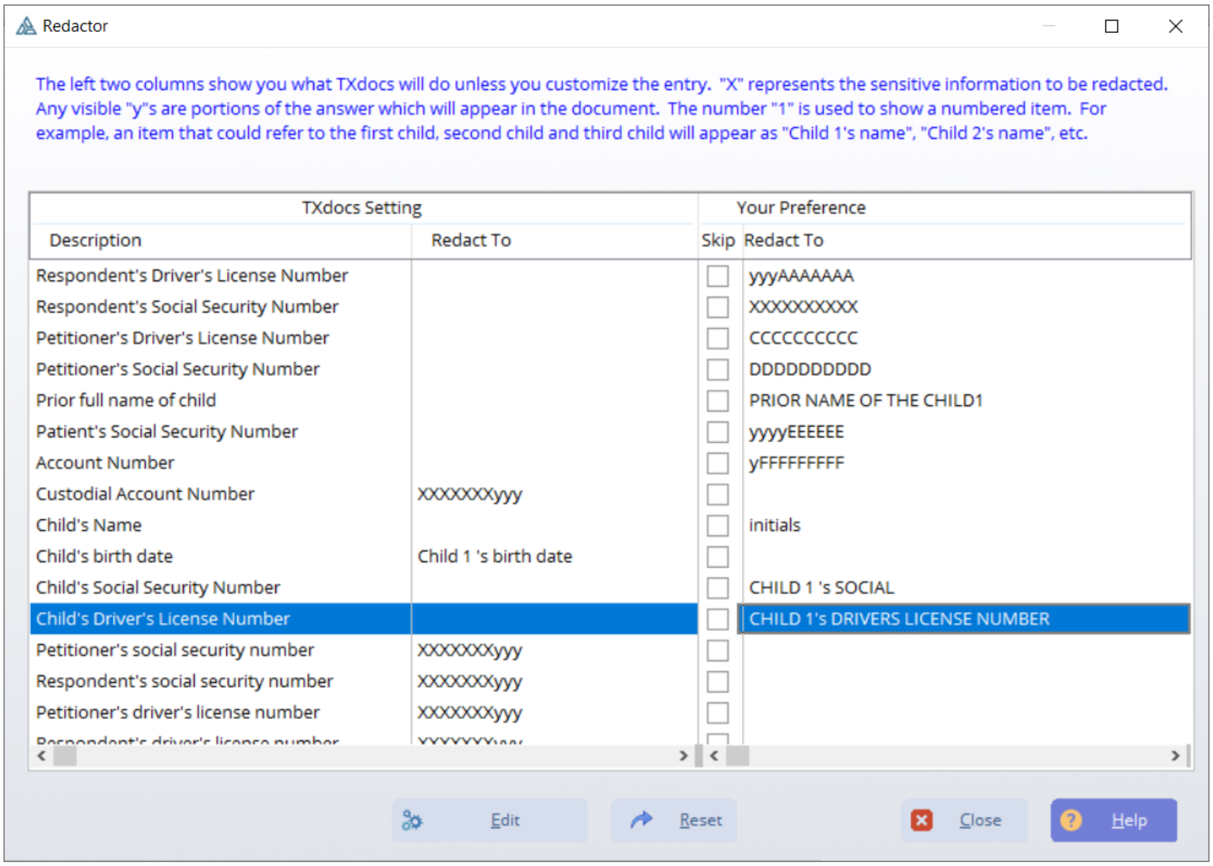
5.1.8 Customize Redactor

Customizing the Redactor allows you to tell TXdocs how you want particular information redacted all the time. This prevents you from having to change the "Redact to" field every time you redact a document.

The left column describes the information being redacted, the middle column shows how TXdocs will redact the information unless you change it, and the right column show's how you have told TXdocs to redact the information.

You can check the Skip column to tell TXdocs to never redact that particular information.

For example, in some counties attorneys are expected to redact children's names by using their initials. In other counties, attorneys are expected to use generic titles such as "Child 1" and "Child 2". To change how children's names are redacted, simply highlight "Child's Name" in the left column and click Edit.



5.2 Probate Tools

TXdocs subscriptions include quite a few special software tools to help with tasks in your probate law practice. If you will take the time to get familiar with them they will save you a lot of time.

5.2.1 Probate Inventory

This is where you will begin entering in property and claims for your Probate case. The items that you enter into the inventory tool will be saved to the Client whose case you selected and when you open that case in the Annual or Final account tool all saved items will populate those tools.

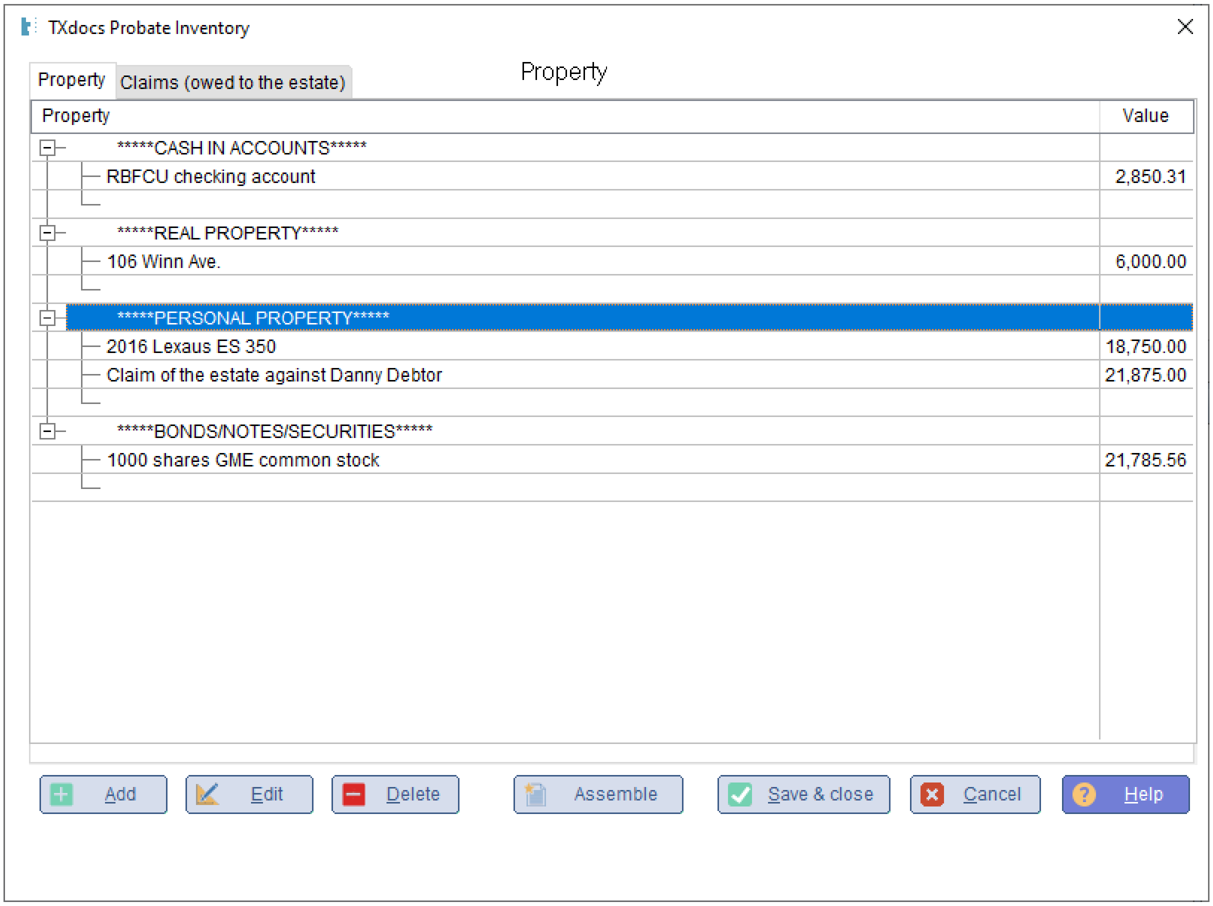
You only need to include property and claims owed to the estate on the inventory so you are provide tabs for each of those categories.

Add - to add an item to the inventory just click the Add button.

Edit - highlight an item and click Edit to change the details of that item. Alternatively, you can double click on an item to edit it.

Delete - this button will permanently delete the selected item from TXdocs.

Assemble - click this button when you are ready to assemble the inventory document



5.2.2 Probate Accounting

The Annual Account tool provides a convenient way to enter all of the information you will need to prepare an annual account.

This accounting period: Enter the beginning and ending dates for this accounting period.

Check here if you want to include a list of unpaid debts: It is unclear whether the code requires this so TXdocs leaves it up to you as the attorney to decide whether you want to include this information.

New accounting period: If your probate case continues past the first year, you can begin a second accounting year. <u>BUT, do not begin a new accounting year until you have completed and assembled the Annual Account for the current year.</u>

Assemble: When the information for the period has been completed, you can click the Assemble button and create the Annual Account for your probate case.

Receipts: On this tab, include all receipts that have come into the representative's possession that belong to the estate.

Disbursements: On this tab, include all cash disbursements made by the representative on behalf of the estate.

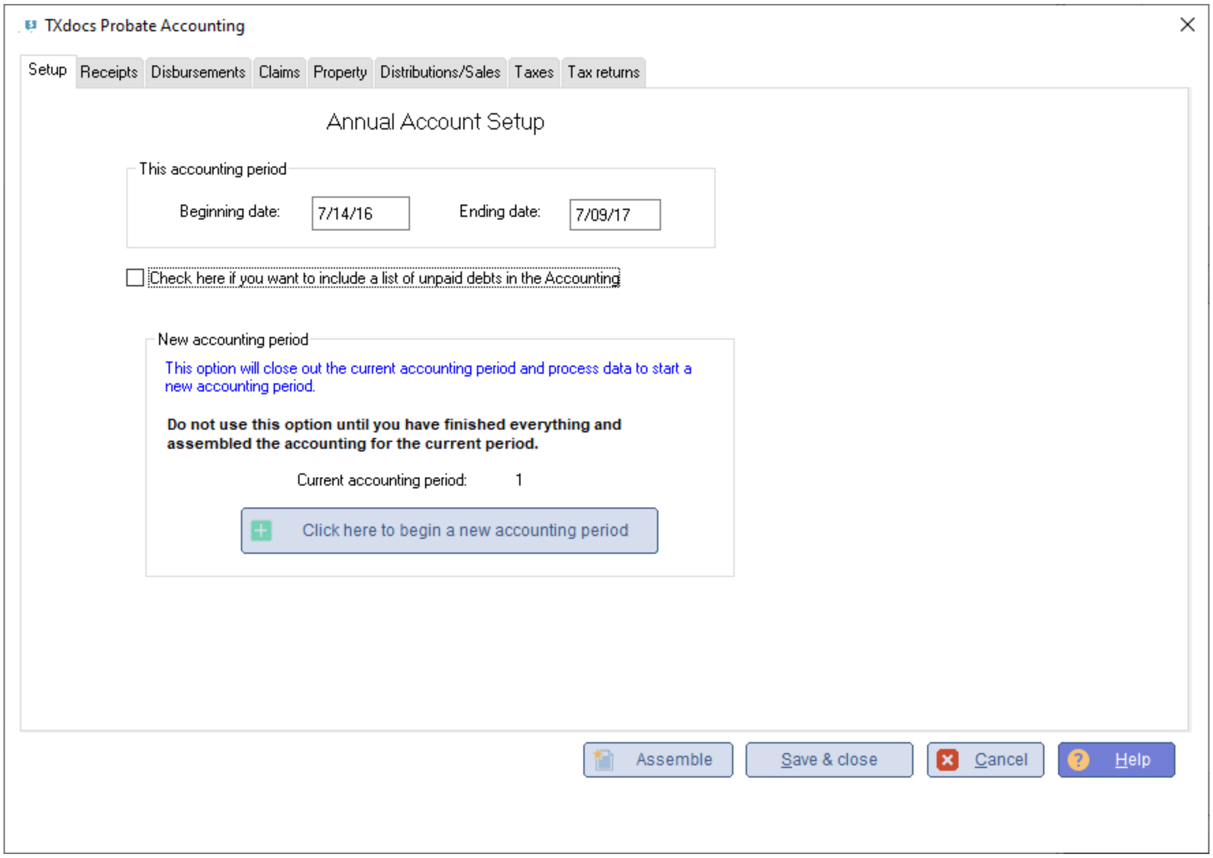
Claims: On this tab, include all claims against the estate presented to the representative during this accounting period.

Property: On this tab, include all property belonging to the estate that came into the possession or control of the representative. <u>NOTE: Since you have to account for all property, you do not generally want to Delete an item. Instead, use the Distribute/Sell button to remove the item from the list and to automatically create an entry on the Distributions/Sales tab</u>. You would delete an item if it was entered in error.

Disbributions/Sales: On the Property tab, there is a button to Sell/Distribute an item of property. When you click that button, an entry will automatically be created in this list. This means you will generally not need to manually Add items since they will be automatically added from the Property list.

Taxes: On this tab, include all taxes currently owed or paid by the estate during this accounting period.

Tax Returns: On this tab, include all tax returns filed during the accounting period.



5.2.3 Probate Final Account

The Final Account tool provides a convenient way to enter all of the information you will need to prepare a final account for a probate case.

This accounting period: Enter the beginning and ending dates for this accounting period.

Check here if you want to include a list of unpaid debts: It is unclear whether the code requires this so TXdocs leaves it up to you as the attorney to decide whether you want to include this information.

How many annual Accounts have been filed in this cause: Indicate how many.

Assemble: When the information for the period has been completed, you can click the Assemble button and create the Annual Account for your probate case.

Receipts: On this tab, include all receipts that have come into the representative's possession that belong to the estate.

Disbursements: On this tab, include all cash disbursements made by the representative on behalf of the estate.

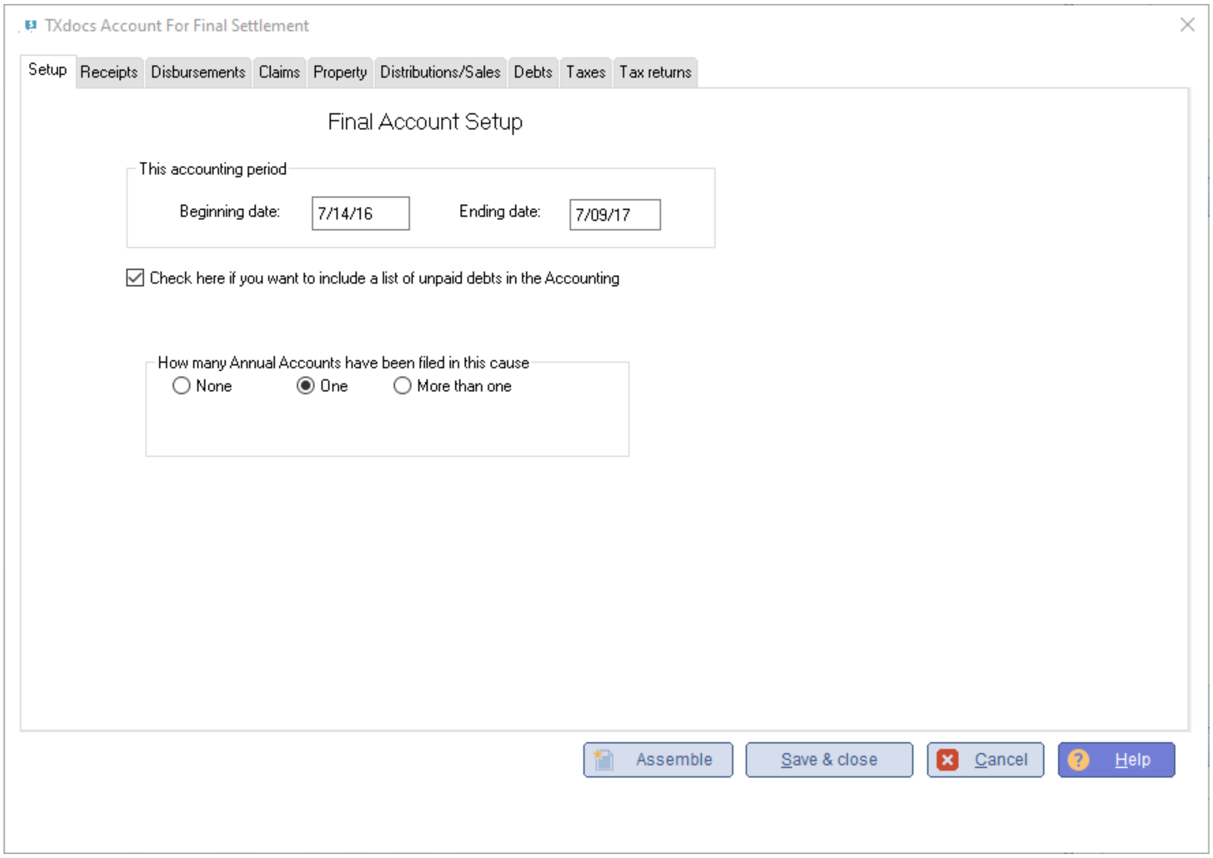
Claims: On this tab, include all claims against the estate presented to the representative during this accounting period.

Property: On this tab, include all property belonging to the estate that came into the possession or control of the representative. <u>NOTE: Since you have to account for all property, you do not generally want to Delete an item. Instead, use the Distribute/Sell button to remove the item from the list and to automatically create an entry on the Distributions/Sales tab</u>. You would delete an item if it was entered in error.

Disbribution/Sales: On the Property tab, there is a button to Sell/Distribute an item of property. When you click that button, an entry will automatically be created in this list. This means you will generally not need to manually Add items since they will be automatically added from the Property list.

Taxes: On this tab, include all taxes currently owed or paid by the estate during this accounting period.

Tax Returns: On this tab, include all tax returns filed during the accounting period.



5.2.4 Probate Final Account Temp

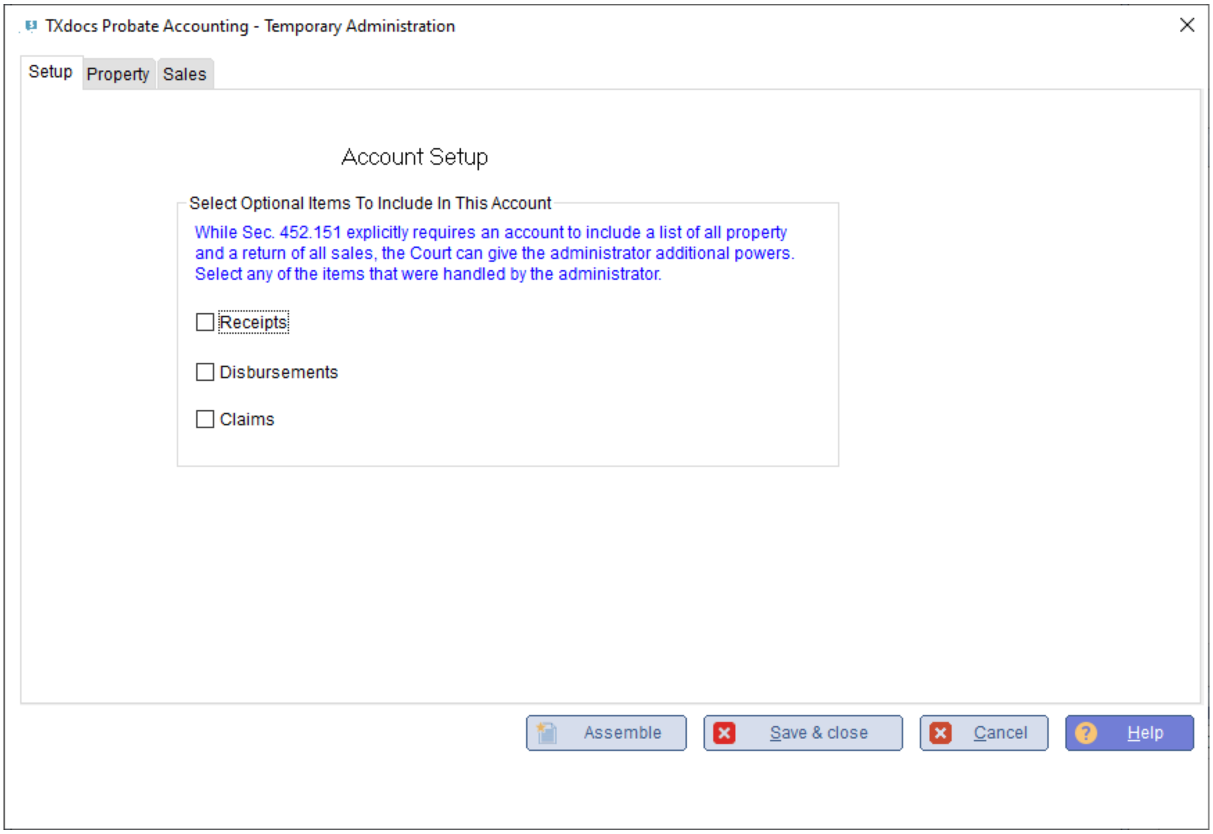
The Annual Account for Temporary Administrations tool provides a convenient way to enter all of the information you will need to prepare a final account.

Assemble: When the information for the period has been completed, you can click the Assemble button and create the Annual Account for your probate case.

Select Optional Items to Include: If you select any of these options then additional tabs will be created for you to enter information about that each selected option.

Property: On this tab, include all property of the estate.

Sales: On this tab, include all sales of property made by the representative on behalf of the estate.



5.3 Guardianship Tools

5.3.1 Guardianship Inventory

This is where you will begin entering in property and claims for your Probate case. The items that you enter into the inventory tool will be saved to the Client whose case you selected and when you open that case in the Annual or Final account tool all saved items will populate those tools.

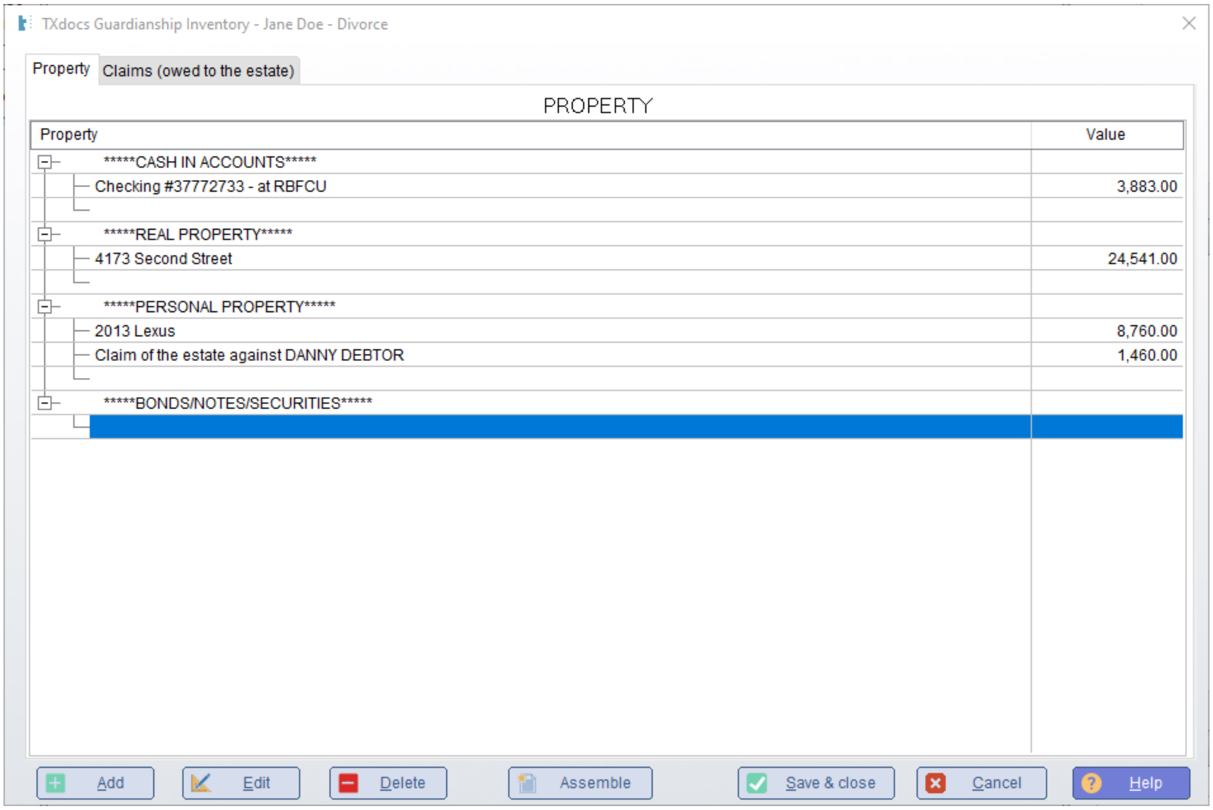
You only need to include property and claims owed to the estate on the inventory so you are provide tabs for each of those categories.

Add - to add an item to the inventory just click the Add button.

Edit - highlight an item and click Edit to change the details of that item. Alternatively, you can double click on an item to edit it.

Delete - this button will permanently delete the selected item from TXdocs.

Assemble - click this button when you are ready to assemble the inventory document



5.3.2 Guardianship Annual Account

The Annual Account tool provides a convenient way to enter all of the information you will need to prepare an annual account.

This accounting period: Enter the beginning and ending dates for this accounting period.

Check here if you want to include a list of unpaid debts: It is unclear whether the code requires this so TXdocs leaves it up to you as the attorney to decide whether you want to include this information.

New accounting period: If your guardianship case continues past the first year, you can begin a second accounting year. <u>BUT, do not begin a new accounting year until you have completed and assembled the Annual Account for the current year.</u>

Assemble: When the information for the period has been completed, you can click the Assemble button and create the Annual Account for your probate case.

Receipts: On this tab, include all receipts that have come into the representative's possession that belong to the estate.

Disbursements: On this tab, include all cash disbursements made by the representative on behalf of the estate.

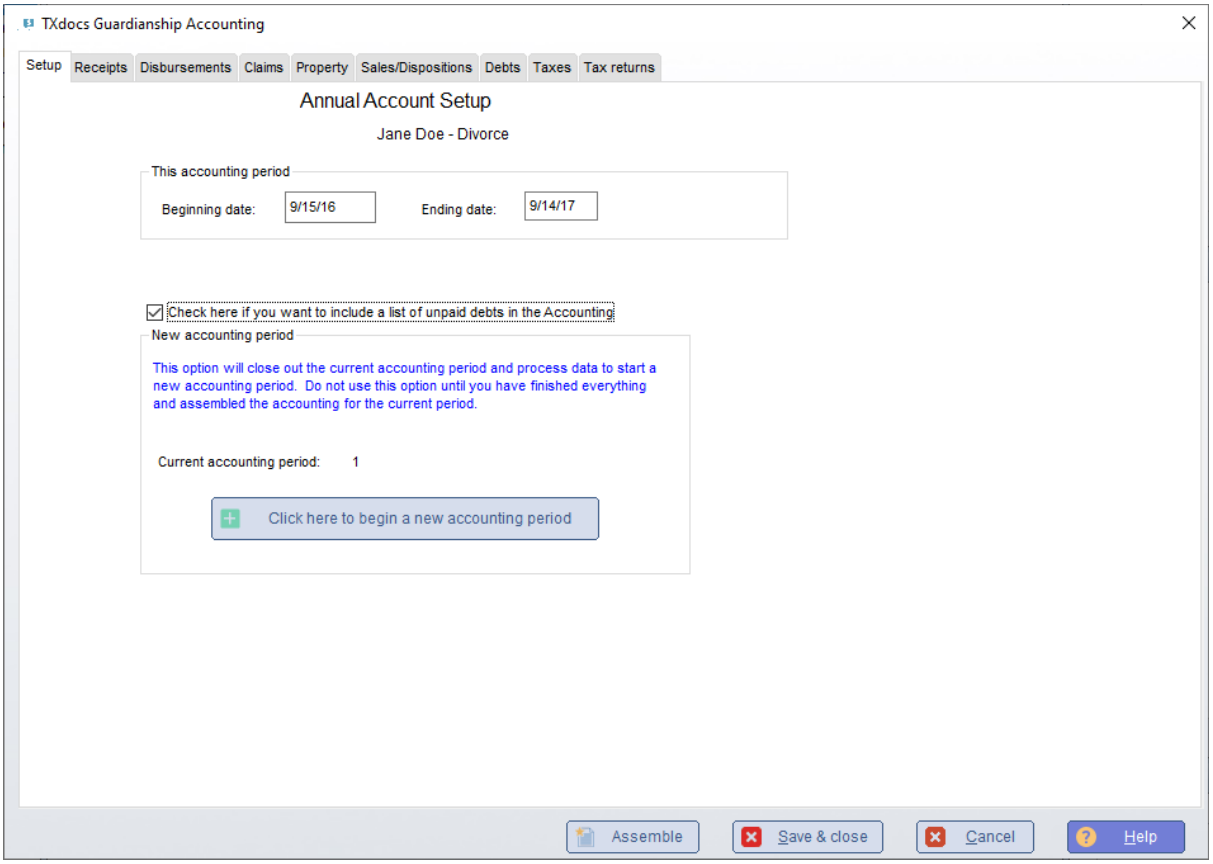
Claims: On this tab, include all claims against the estate presented to the representative during this accounting period.

Property: On this tab, include all property belonging to the estate that came into the possession or control of the representative. <u>NOTE: Since you have to account for all property, you do not generally want to Delete an item. Instead, use the Distribute/Sell button to remove the item from the list and to automatically create an entry on the Distributions/Sales tab</u>. You would delete an item if it was entered in error.

Sales/Dispositions: On the Property tab, there is a button to Sell/Dispose an item of property. When you click that button, an entry will automatically be created in this list. This means you will generally not need to manually Add items since they will be automatically added from the Property list.

Taxes: On this tab, include all taxes currently owed or paid by the estate during this accounting period.

Tax Returns: On this tab, include all tax returns filed during the accounting period.



5.3.3 Guardianship Annual for Final Settlement

The Final Account tool provides a convenient way to enter all of the information you will need to prepare a final account for a guardianship case.

This accounting period: Enter the beginning and ending dates for this accounting period.

Check here if you want to include a list of unpaid debts: It is unclear whether the code requires this so TXdocs leaves it up to you as the attorney to decide whether you want to include this information.

How many annual Accounts have been filed in this cause: Indicate how many.

Assemble: When the information for the period has been completed, you can click the Assemble button and create the Annual Account for your probate case.

Receipts: On this tab, include all receipts that have come into the representative's possession that belong to the estate.

Disbursements: On this tab, include all cash disbursements made by the representative on behalf of the estate.

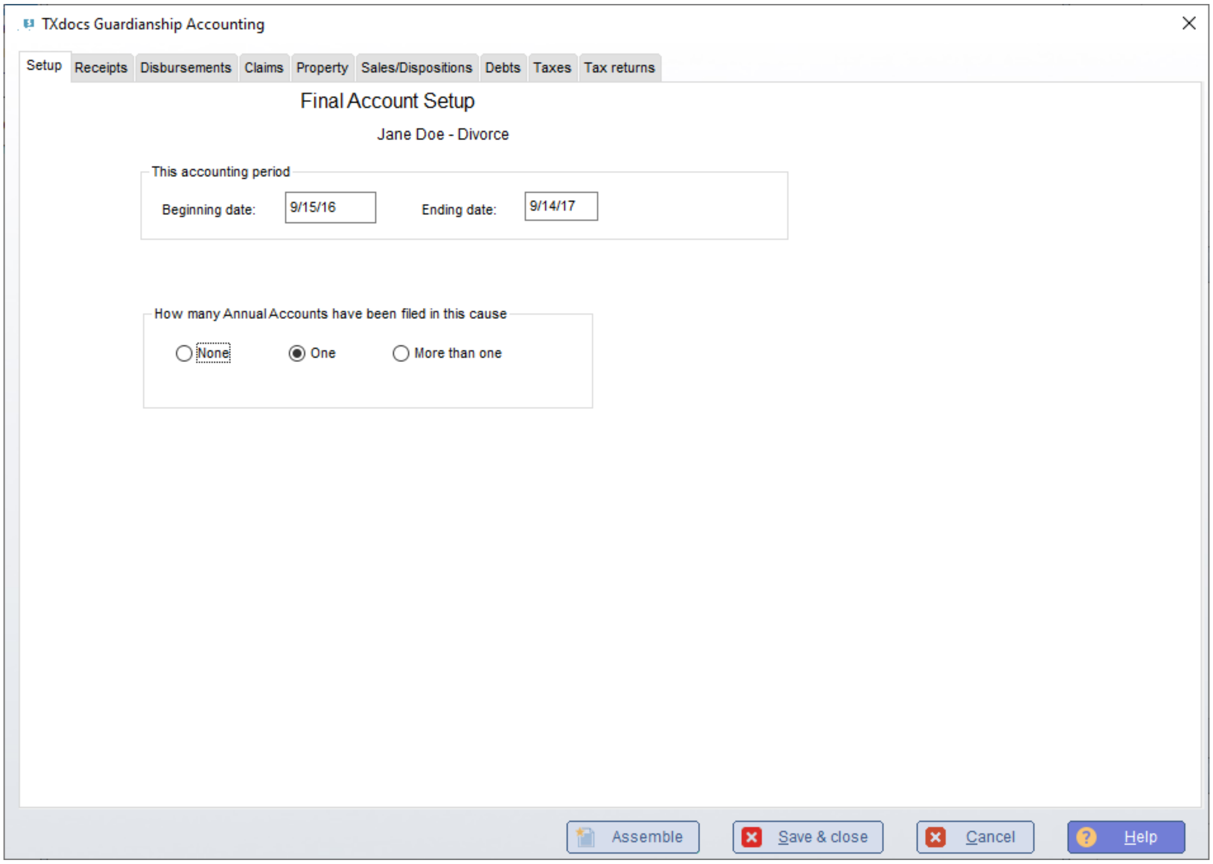
Claims: On this tab, include all claims against the estate presented to the representative during this accounting period.

Property: On this tab, include all property belonging to the estate that came into the possession or control of the representative. NOTE: Since you have to account for all property, you do not generally want to Delete an item. Instead, use the Distribute/Sell button to remove the item from the list and to automatically create an entry on the Distributions/Sales tab. You would delete an item if it was entered in error.

Sales/Dispositions: On the Property tab, there is a button to Sell/Distribute an item of property. When you click that button, an entry will automatically be created in this list. This means you will generally not need to manually Add items since they will be automatically added from the Property list.

Taxes: On this tab, include all taxes currently owed or paid by the estate during this accounting period.

Tax Returns: On this tab, include all tax returns filed during the accounting period.



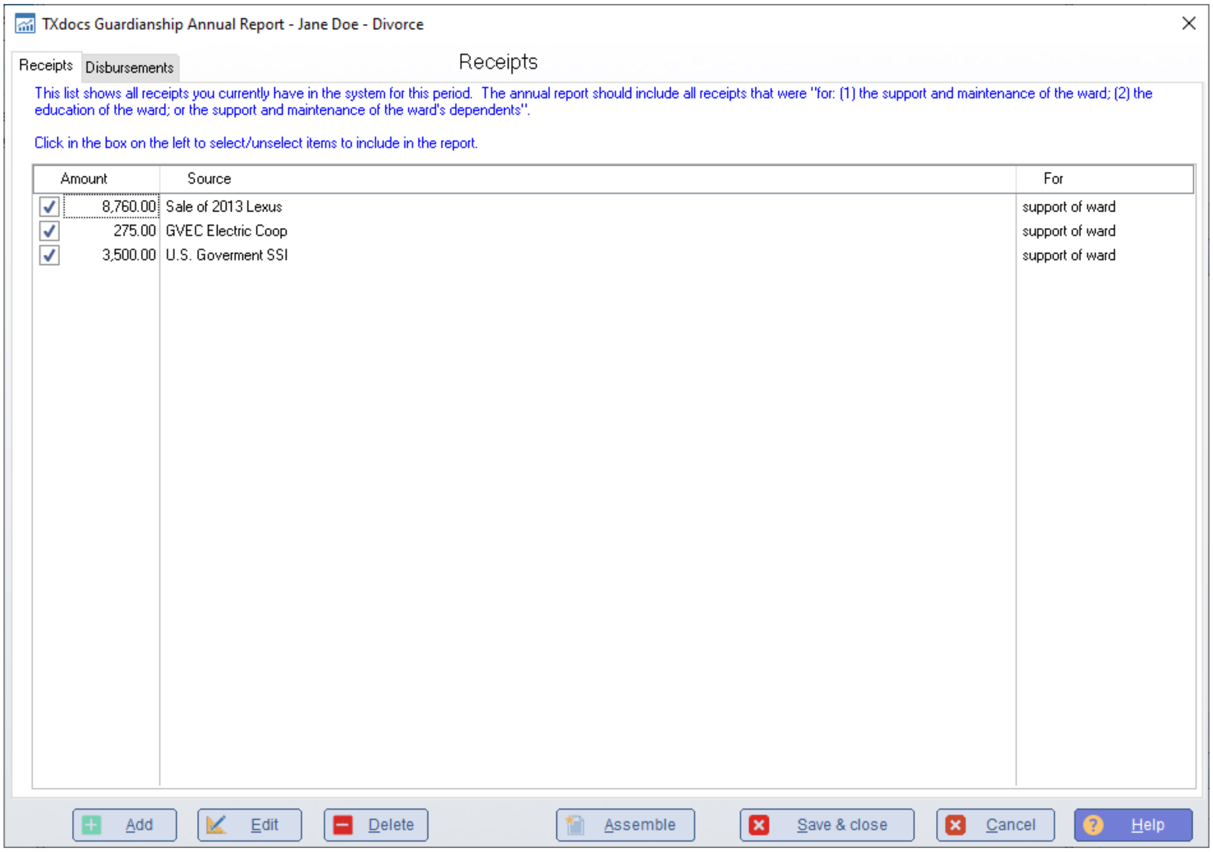
5.3.4 Guardianship Annual Report

Add - to add an item to the inventory just click the Add button.

Edit - highlight an item and click Edit to change the details of that item. Alternatively, you can double click on an item to edit it.

Delete - this button will permanently delete the selected item from TXdocs.

Assemble - click this button when you are ready to assemble the inventory document



5.4 Client Web Services

Client web services give you the ability to have your client enter case related information on an internet site and so that you can download that information directly into TXdocs.

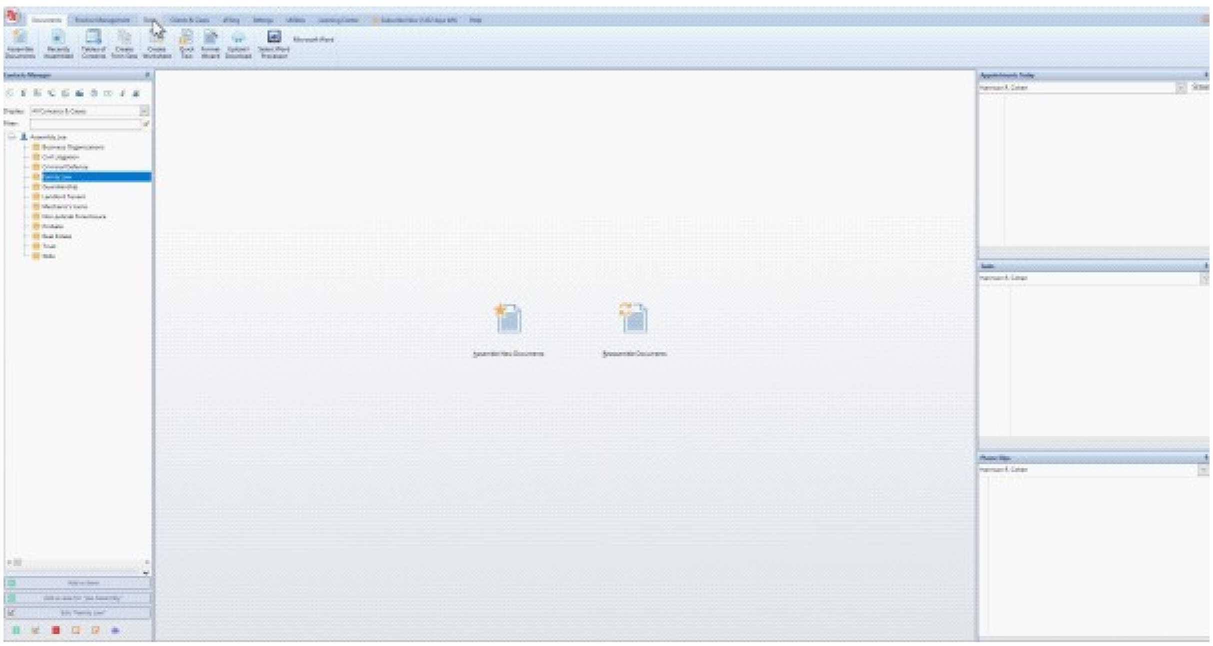
5.4.1 WebServicesNew

Client Web Services give your clients the ability to go online and enter their own information at TXdocs' secure website. When they are finished, you simply download the data directly into that client's case file. This process will save you and your staff tons of time with every case.

Here is an outline of how the system works:

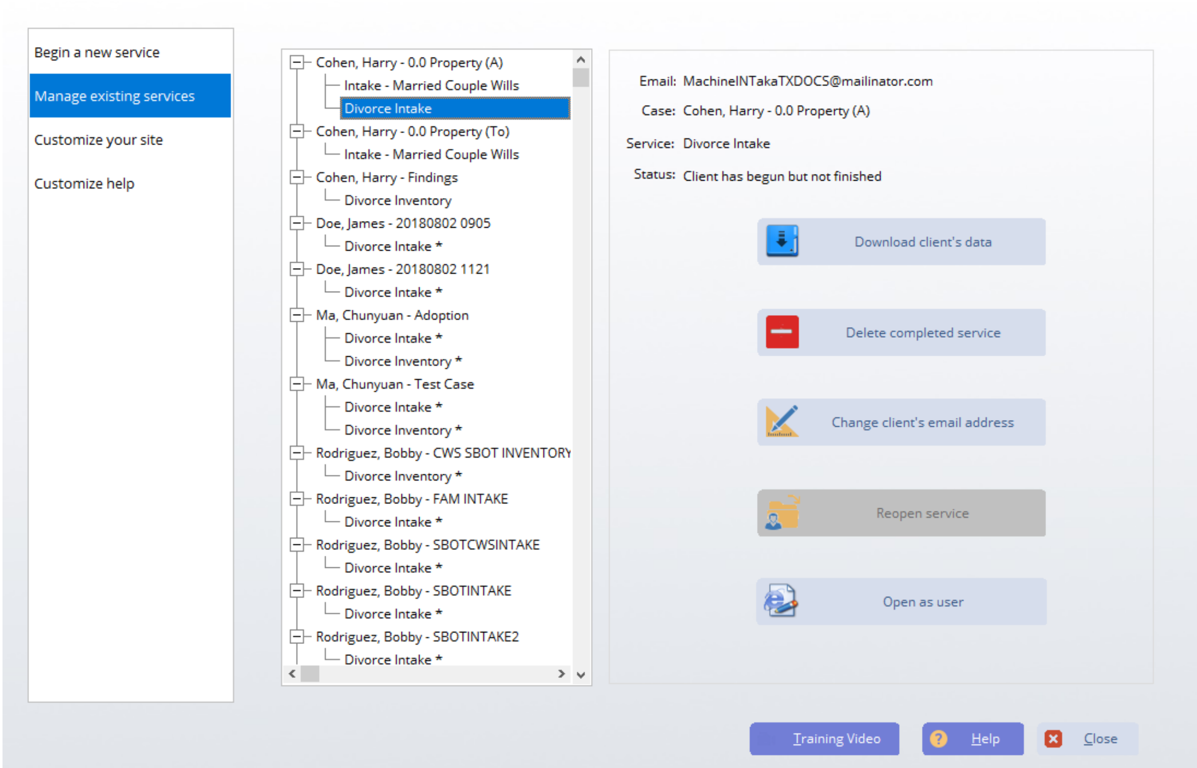
1 . In the Client Web Services Manager Window, you select an existing client and case.
2. Click a button to send an email to your client. The email includes a link to our website and a password.
3. Your client logs on and completes the information.
4. When your clients are finished, they click a button that sends a notification email to you.
5. Using the Client Web Services Manager, you download the data and it's there, ready for use the next time you assemble a document for that case.

HINT: If you enter your clients' email addresses as you add the client to TXdocs, you won't have to enter it again on this screen.



5.4.2 WebServicesExisting

This window shows all clients for whom you have set up a Client Web Service. Underneath each client's name is a list of the services that are pending.
After your client has logged on and entered information, the "Download client's data" button is enabled and you will be able to download that information.



Download client's data: After your client has entered their information for the selected service, this button is enabled. It will download the client's information to your TXdocs.

Delete completed service: Over time you will build a long list of services that you have to scroll through. You can manage this list by choosing to delete all of the data for a client's service that you no longer need.

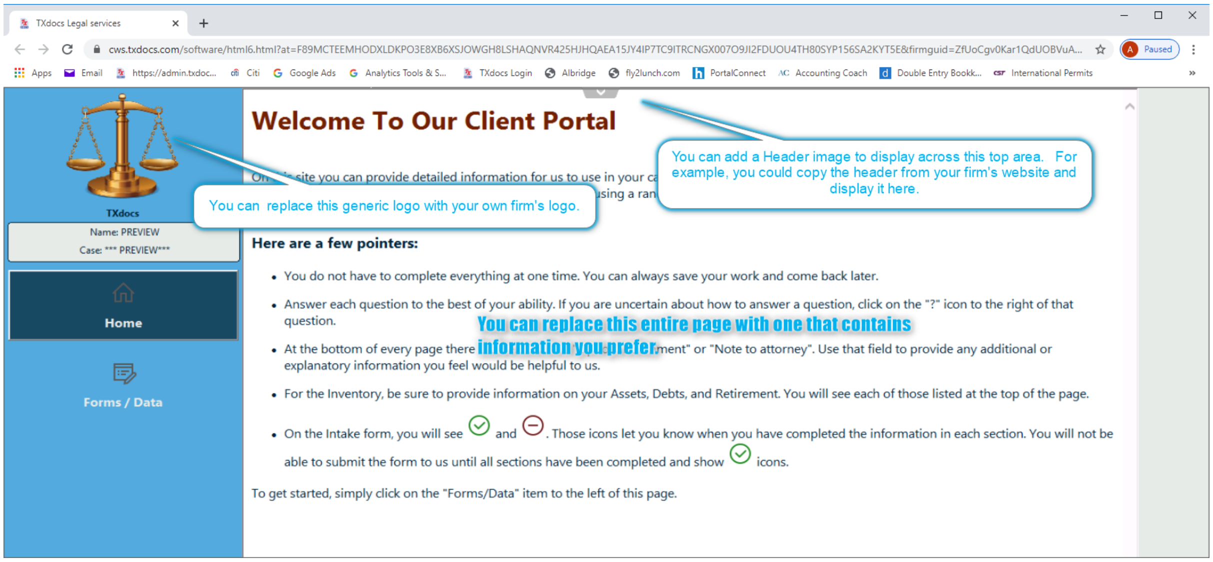
Change client's email address: Use this to change the client's email address in TXdocs.

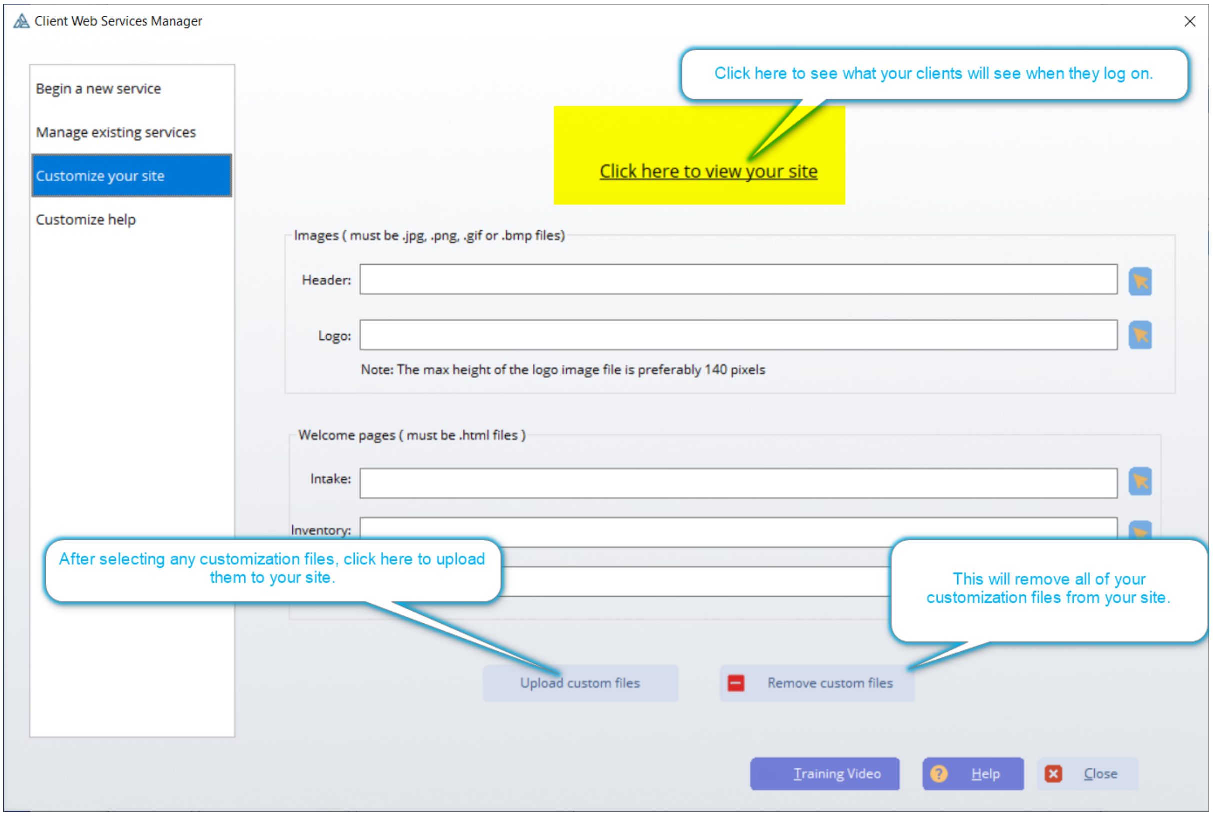
Reopen service: After you have downloaded a client's data, the case is closed and your client will not be able to log on the add or change data. This protects you from having them change information without you knowing it. If you decide that you should allow your client to log on and update their information, you can Reopen the service for them.

Open as user: Click this button to open the website just as if it is your client logging in. This gives you the ability to preview their data or to provide them help. Using this feature, you will access the site as if you are your client.

5.4.3 WebServicesCustomize

The Client Web Services site can be customized to look like your firm's website. You can upload a header and/or a footer image to be displayed whenever one of your clients visits the site. You can also completely replace the standard TXdocs welcome page with a page created by you.





To get started, click on the link "**Click here to view your site**". This will show you the same page that your clients will see when the log on.

Then, after uploading your customization files click there again to see the effect of your changes.

To upload a custom logo or header, the image files must meet these requirements.
- they must be either .jpg, png, .gif or .bmp format
- the headers image can be up to 1400 pixels wide, and the logo can't be more than 1200 pixels wide.
- the height can be anything you want - we have found 200 pixels for the header and 140 pixels for the Logo looks pretty good.

The easiest way to acquire an image is to open your firm's website in your browser and take a screen shot of it. Then, use an image editor to crop and re-size the header and footer sections into individual files.

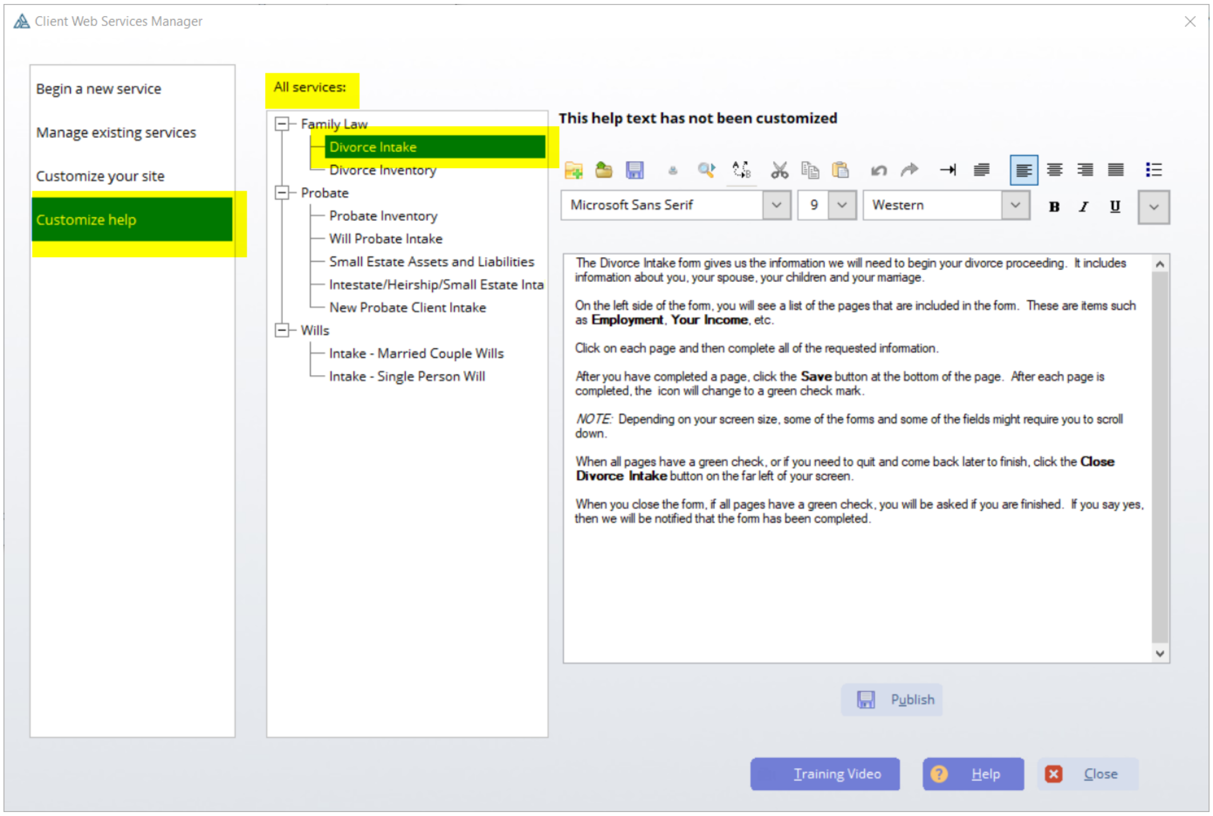
Client Web Services provides web pages for obtaining Inventory Information (Family Law and Probate) as well as new case intake information for Family Law, Probate and Wills. You can create replacement welcome pages for each of those:
- the files must be .htm or .html format
- the easiest way to create the files is to create them in Word and then Save As - Web Page(*.htm,*.html)

After you have created and selected the images and welcome pages that you want to use, click the **Upload custom files** button on the screen to upload the files.

Finally, after you are finished, click the preview link to see how the site will look to your clients.

5.4.4 WebServicesHelp

Each service in Client Web Services has its own help information. When your client is preparing to use the service. they can click on a Help button for additional help information on how to answer the questions. You can edit those help files to provide any other information you wish.



When you highlight a service, the help information displayed for that service appears in the editor on the right. Simply edit the help information as you wish.

Once you are satisfied with your change to a specific help page, click the **Publish** button to save and upload your change to that help text.

5.5 Deadline Calculator

The deadline calculator will calculate any deadline contained in the Texas Rules of Civil Procedure or the Texas Civil Practice and Remedies Code. Additionally, it the deadline falls on a courthouse holiday in the relevant county, the deadline will be bumped to the next day.

Source: Select the code you want from the drop list.

Jump to: If you know the rule or section number, type it here and then click the jump to button to jump to that section/rule.

Add to favorites: The "Source" drop list includes an entry titled "Favorites". If there are deadlines you use frequently, highlight the rule and click Add to Favorites. This will add the rule/section to your favorites list to help you find it quicker the next time.

Use generic calculator: Check this box if you just want to calculate a deadline based on some number of days but not based on any particular rule.

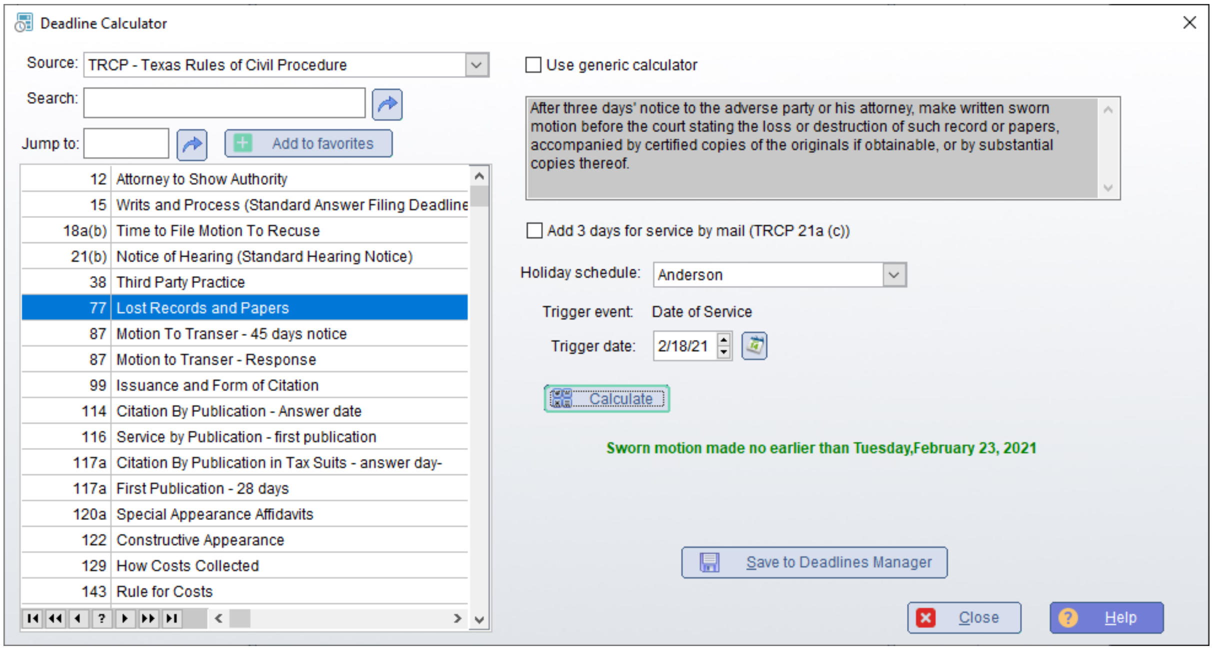
Add 3 days for service by mail: Check this box if you are serving notice by mail.

Holiday schedule: Every year TXdocs surveys all of the Texas counties and attempts to obtain their courthouse holiday schedule. Select the appropriate county from the drop list and TXdocs will adjust calculated deadlines for courthouse holidays.

Trigger date: Enter the date that the trigger event occurred.

Calculate: Click this button to perform the calculation

Save to Deadlines Manager: If you use TXdocsPlus, when you click this button you will select the relevant case and then TXdocs will post this deadline to the Deadlines Manager and to the selected case's Case Manager.

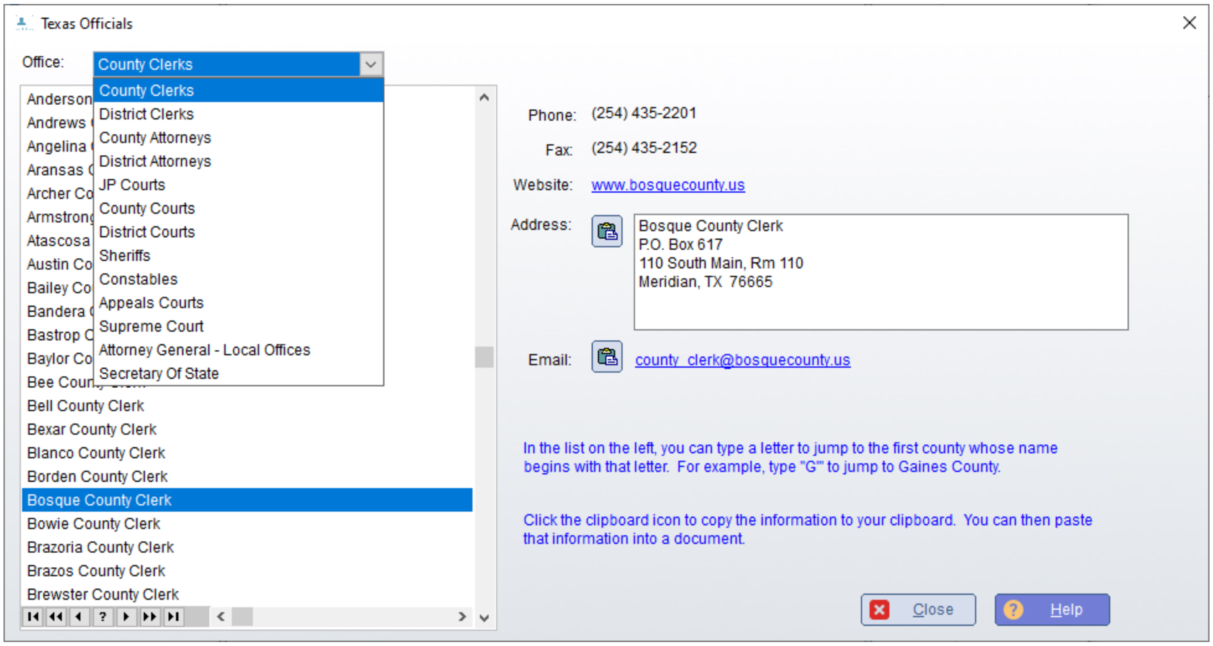


5.6 Officals Directory

The Officials Directory provides contact office for the offices of every County clerk, District Clerk, County Attorney, District Attorney, JPCourt, County Court, District Court, Sheriff and Constable in every county i Texas. It also provides contact information for each Court of Appeals, the Supreme Court, Attorney General and Secretary of State.

Office: Just select the office you want from the drop list.

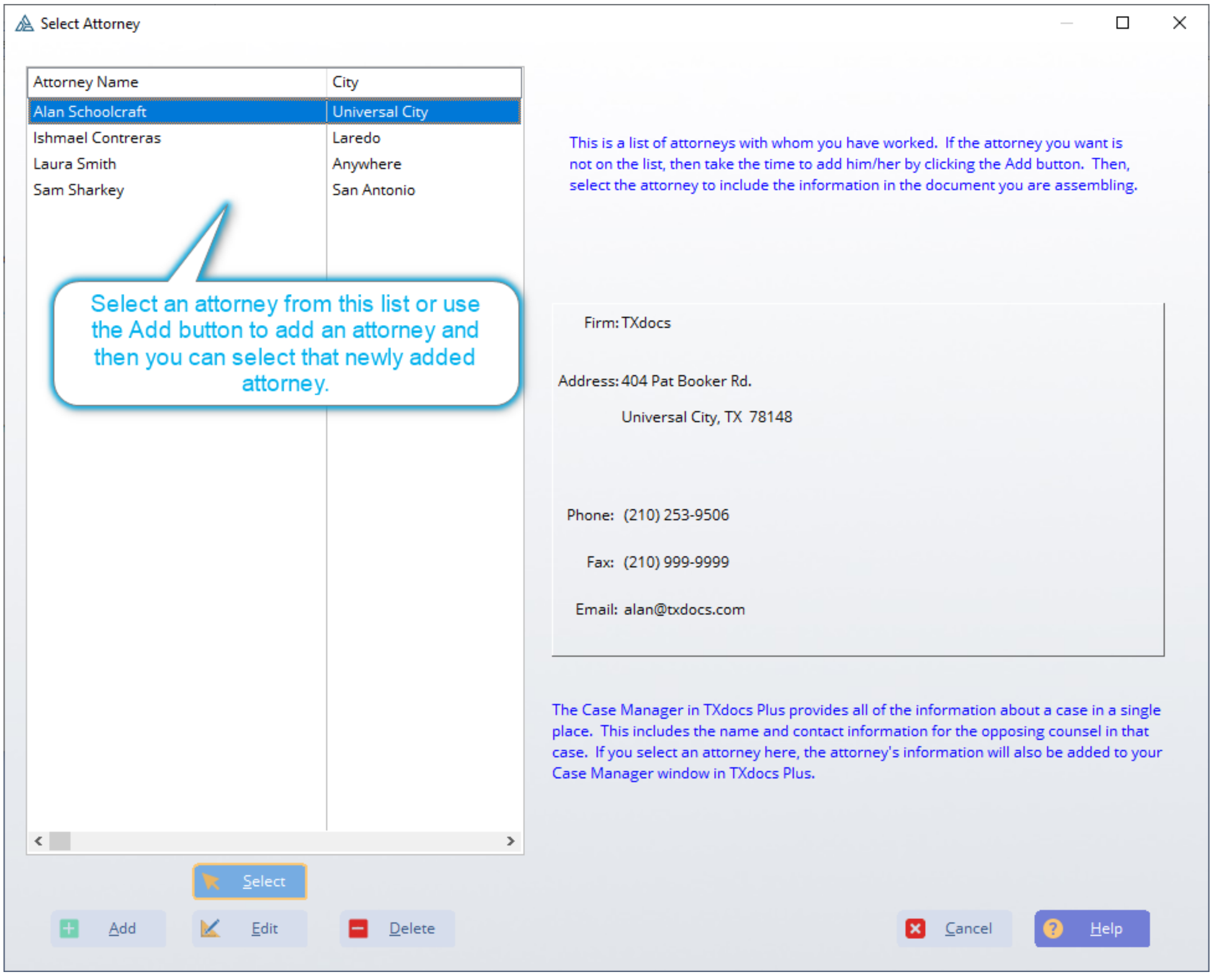
To jump to a county type the first letter of the county's name.



5.7 Opposing Counsel

The Opposing Counsel tool gives you a way to build a contact list database of attorneys you deal with. In addition to their name, address and phone numbers, it will save their firm name and bar number. When you are assembling documents and you need to include an attorney for a certificate of service or for some other reason, you will be able to simply select the attorney from your list. If the attorney is not already in your list, TXdocs will automatically add the attorney when you enter the attorney's informatin for the document you are assembling.

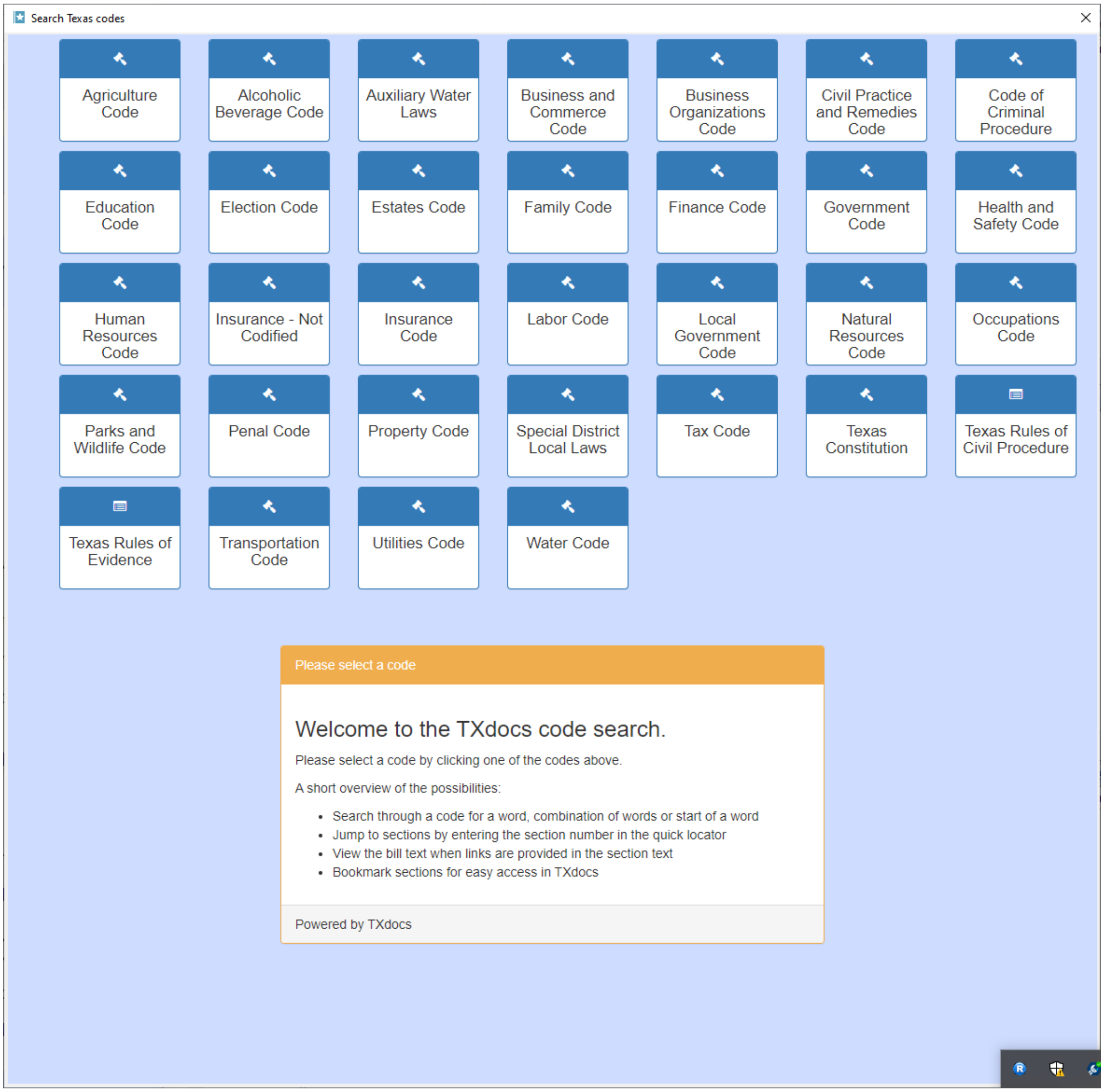
When you click **Lookup attorney**, the following window will open. You can select an attorney from the list. If the attorney is not already in your list, then add the attorney and then select him/her.



5.8 Texas Codes

Texas Codes is provided by TXdocs as an internet tool for reading and searching the Texas Codes. When you click the button, TXdocs opens your internet browser with a menu page that lets you select which code you want to work with.

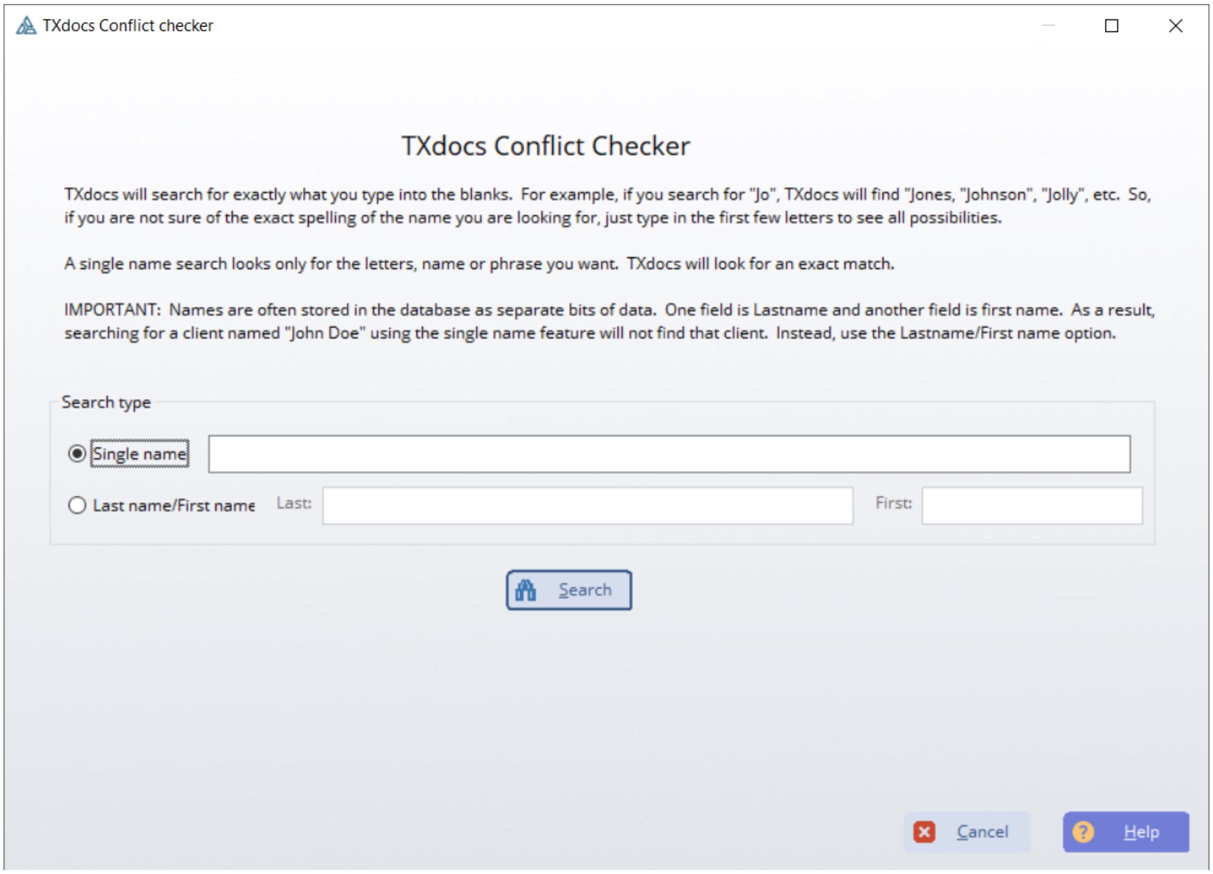
After you select a code, you will be able to jump to specific sections and search using an advanced search feature. You can also copy sections of the code to your clipboard by clicking on the clipboard icon that becomes visible as you select a section. You can also create bookmarks of favorite sections.


Search Texas codes
Agriculture Code
Alcoholic Beverage Code
Auxiliary Water Laws
Business and Commerce Code
Business Organizations Code
Civil Practice and Remedies Code
Code of Criminal Procedure
Education Code
Election Code
Estates Code
Family Code
Finance Code
Government Code
Health and Safety Code
Human Resources Code
Insurance - Not Codified
Insurance Code
Labor Code
Local Government Code
Natural Resources Code
Occupations Code
Parks and Wildlife Code
Penal Code
Property Code
Special District Local Laws
Tax Code
Texas Constitution
Texas Rules of Civil Procedure
Texas Rules of Evidence
Transportation Code
Utilities Code
Water Code
Please select a code
Welcome to the TXdocs code search.
Please select a code by clicking one of the codes above.
A short overview of the possibilities:
Search through a code for a word, combination of words or start of a word
Jump to sections by entering the section number in the quick locator
View the bill text when links are provided in the section text
Bookmark sections for easy access in TXdocs
Powered by TXdocs

5.9 Conflict Checker

The conflict checker searches all records in your TXdocs database for name to find if that person has somehow been involved in some previous case handled by the firm. When you enter in a Single name it will only search for that name and when you search for a First and Last name it will produce results where the first and last name are present together.

The conflict checker is most effective if you are using TXdocsPlus because it will check all contacts, case notes, appointments, expense slips, time slips, etc. If you are just using TXdocs, then the only database to be checked is the contacts database that contains the names of your clients.

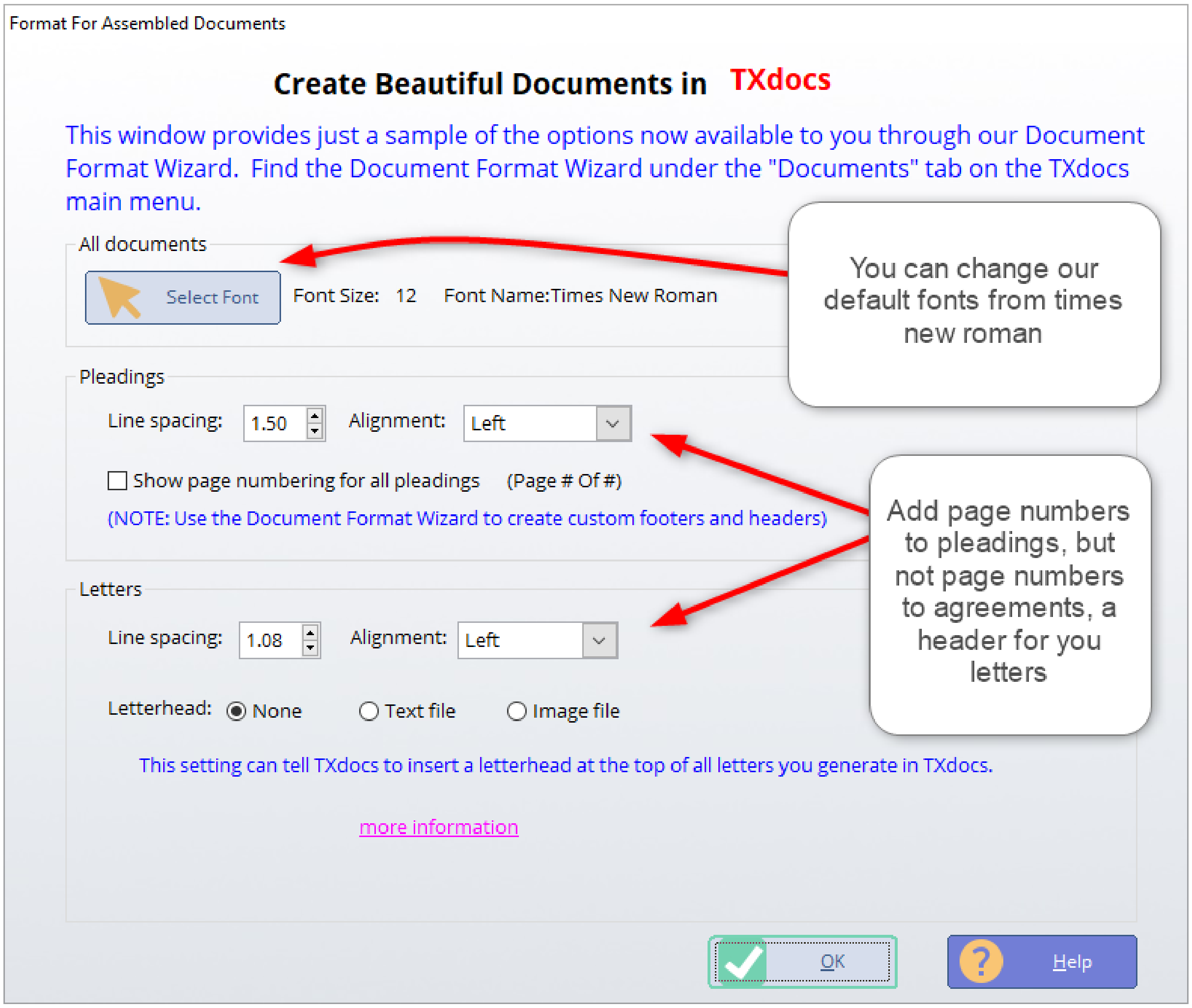


Formating in TXdocs

6 Formating in TXdocs

6.1 SetupDocFormatInitial

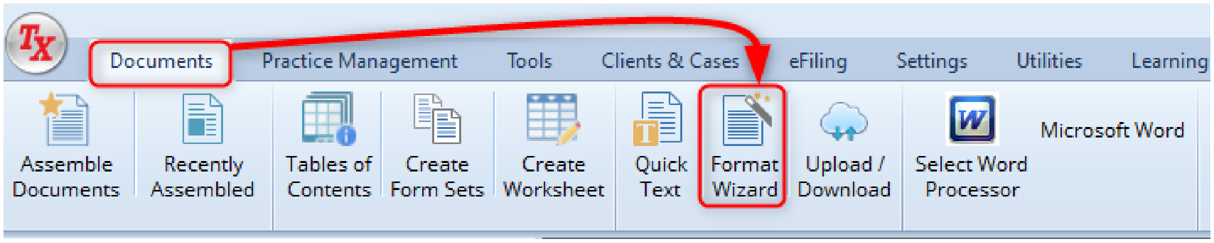
After TXdocs is initialized you will receive the following window. This screen sets the format for documents you want to assemble. These options can be changed later on through the use of the Document Format Wizard



6.2 Documents Format Wizard

This is one of the most complex windows in TXdocs. It gives you incredible power to control almost every aspect of how your assembled documents will be formatted.

Located at the top of TXdocs:



You can tell TXdocs how you want completed documents to be formatted. To format documents, select Setup/Format assembled documents in the main menu. Then select the tab that corresponds with the formatting changes you wish to make.

The formatting options available to you are dependent on the type of document. For example, for pleadings, you will be able to set options for the caption of the pleading. This would not be relevant to a letter.

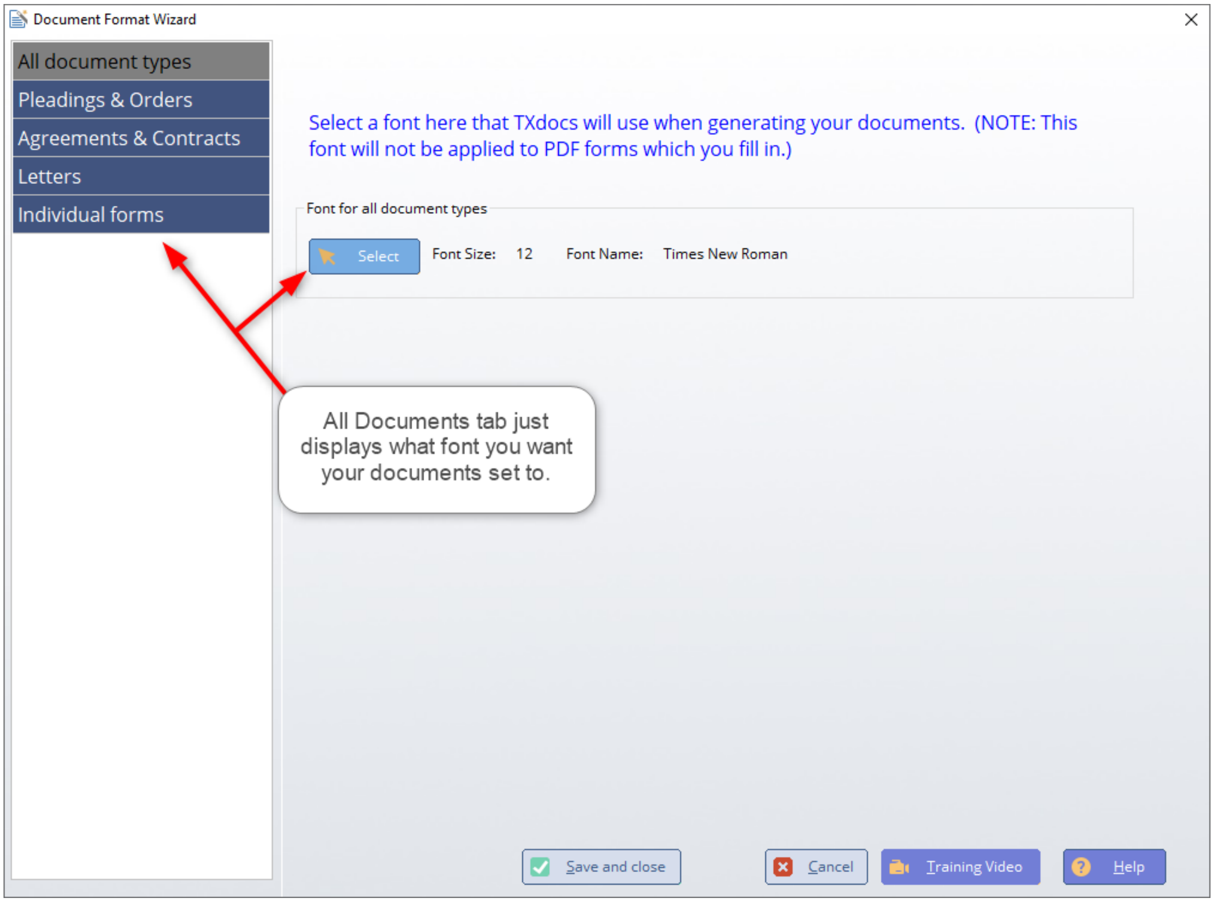
The settings you make in this window generally apply to all documents of the particular type. For example, when you make a selection for bolding the captions in Pleadings, that selection applies to all pleadings you assemble. BUT - you can override this selection in the Individual Forms section of this window. There, you can select a particular pleading form and make a different selection.

Every form in TXdocs has been preset by us as either a Pleading or Order, an Agreement or Contract, or a Letter.

IMPORTANT: After you have made your formatting selections, be sure to click the Save and close button to save your selections

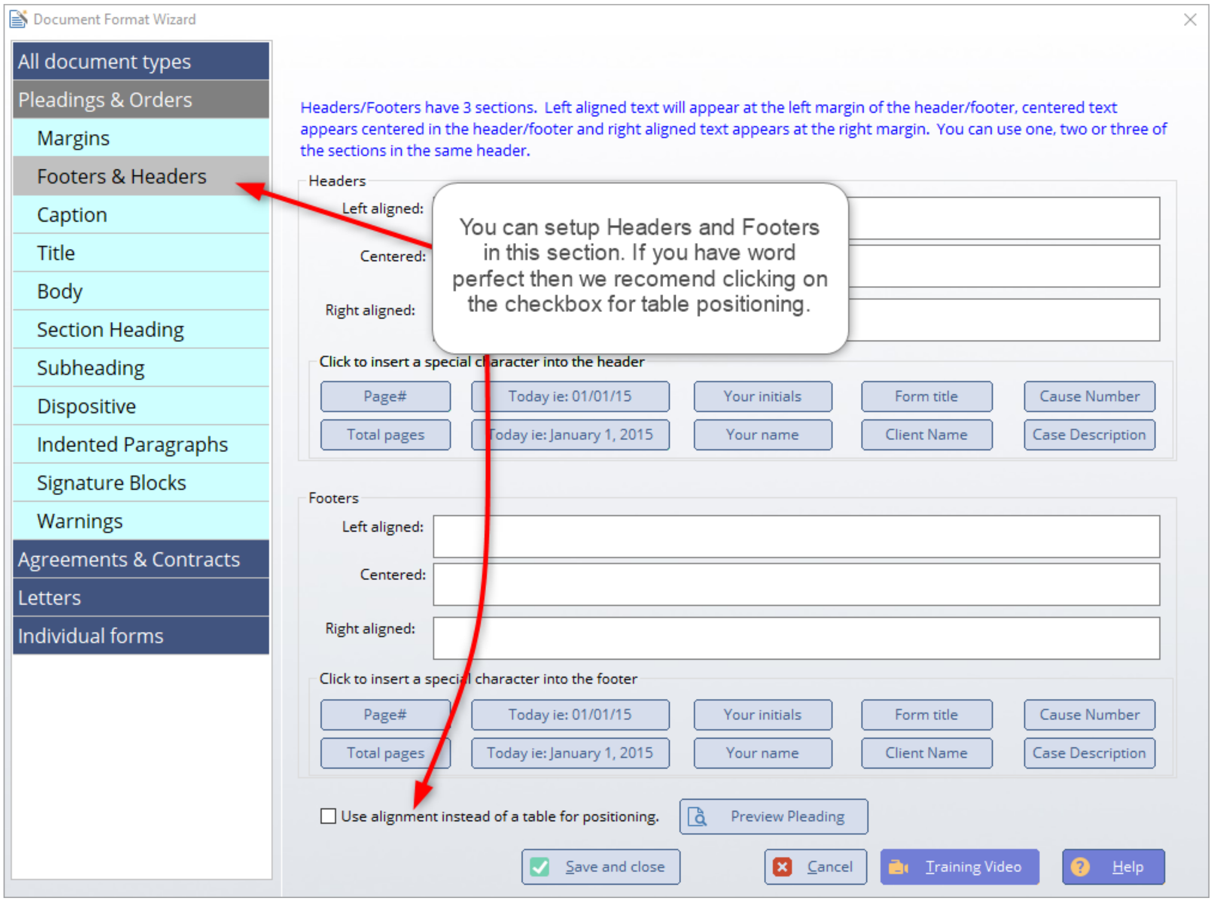
All document types

Click this option to set font name and size that you want applied to all of your documents.



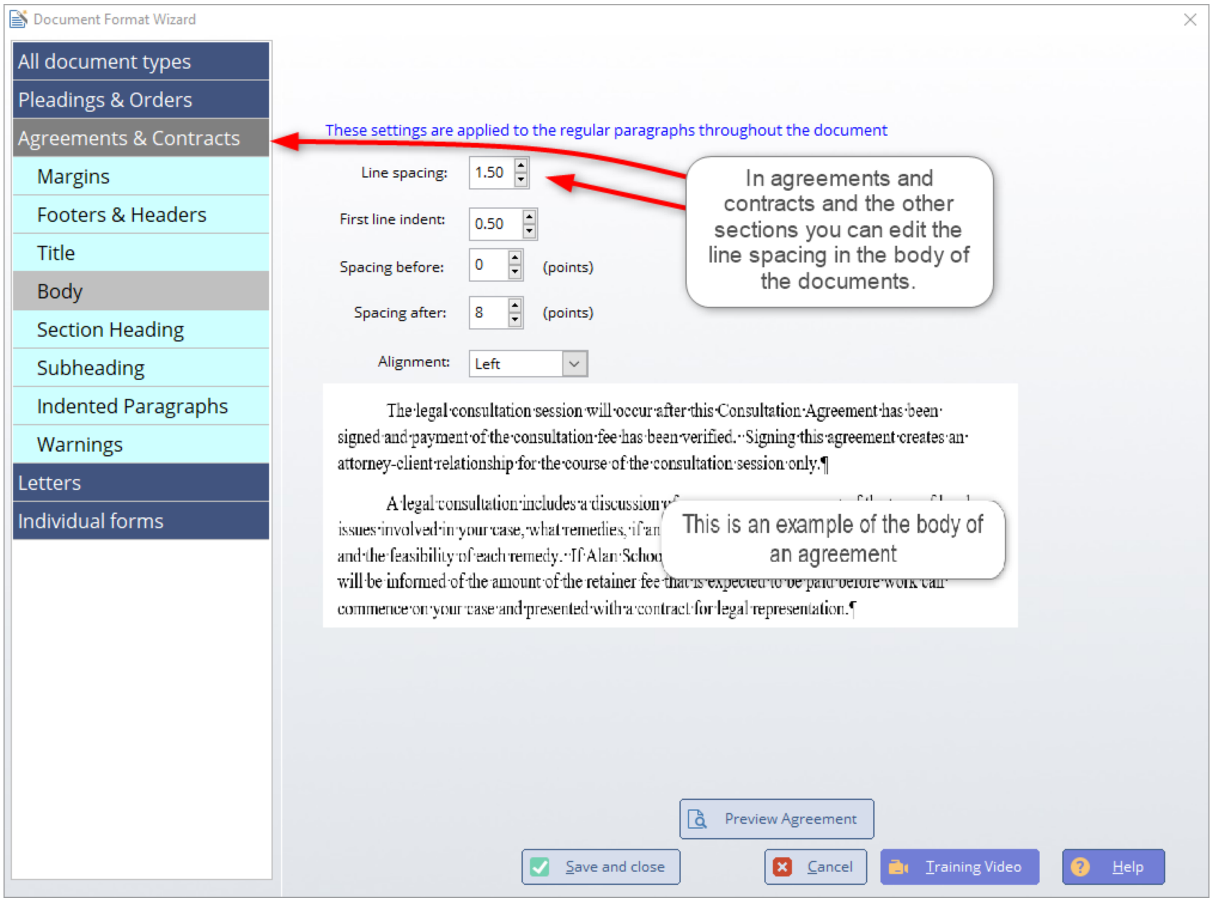
Pleadings and Orders

Click this option to set preferences for captions, headers and footers, signature blocks, etc. that you want applied to all pleadings and orders that you assemble.



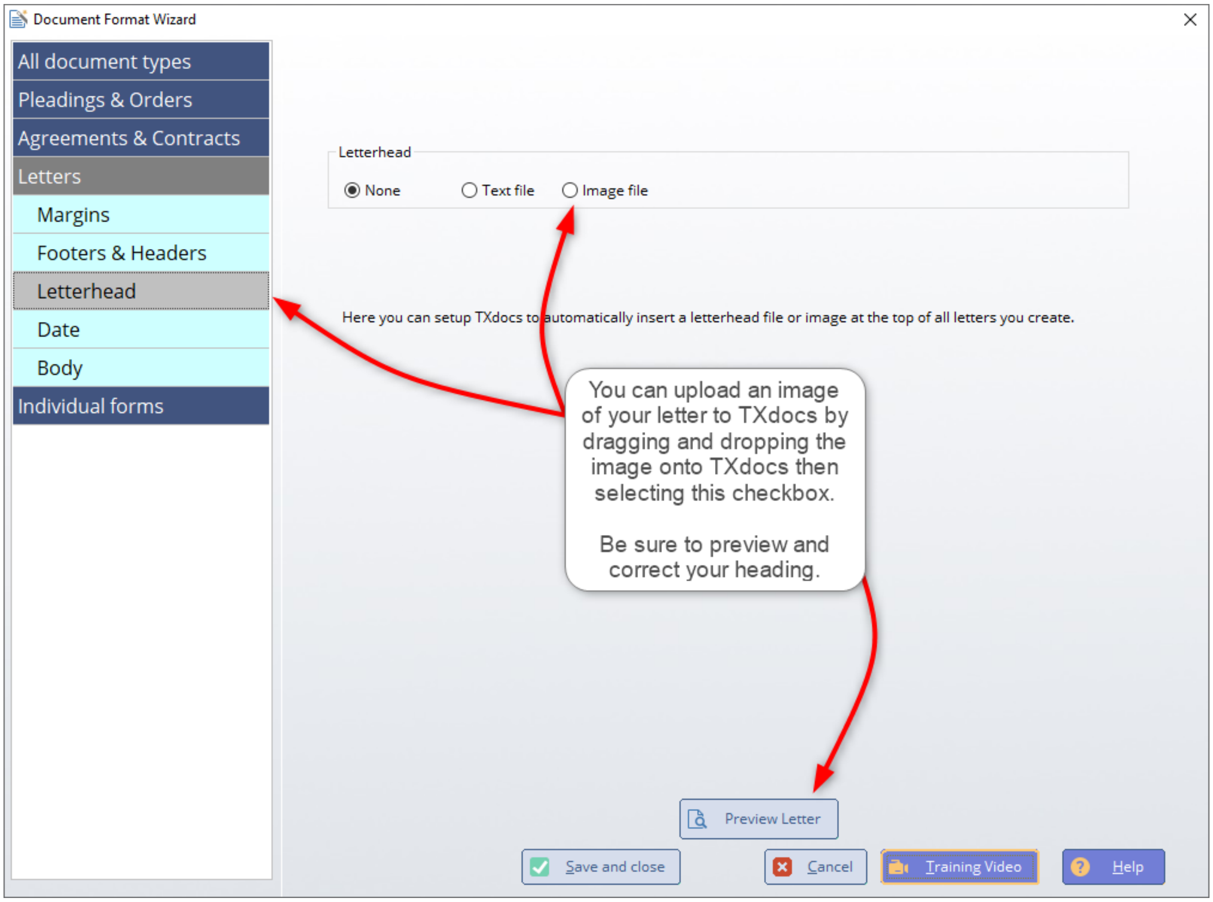
Agreements & Contracts

Click this option to set preferences for headers and footers, margins, etc. that you want applied to all agreements and contracts that you assemble.



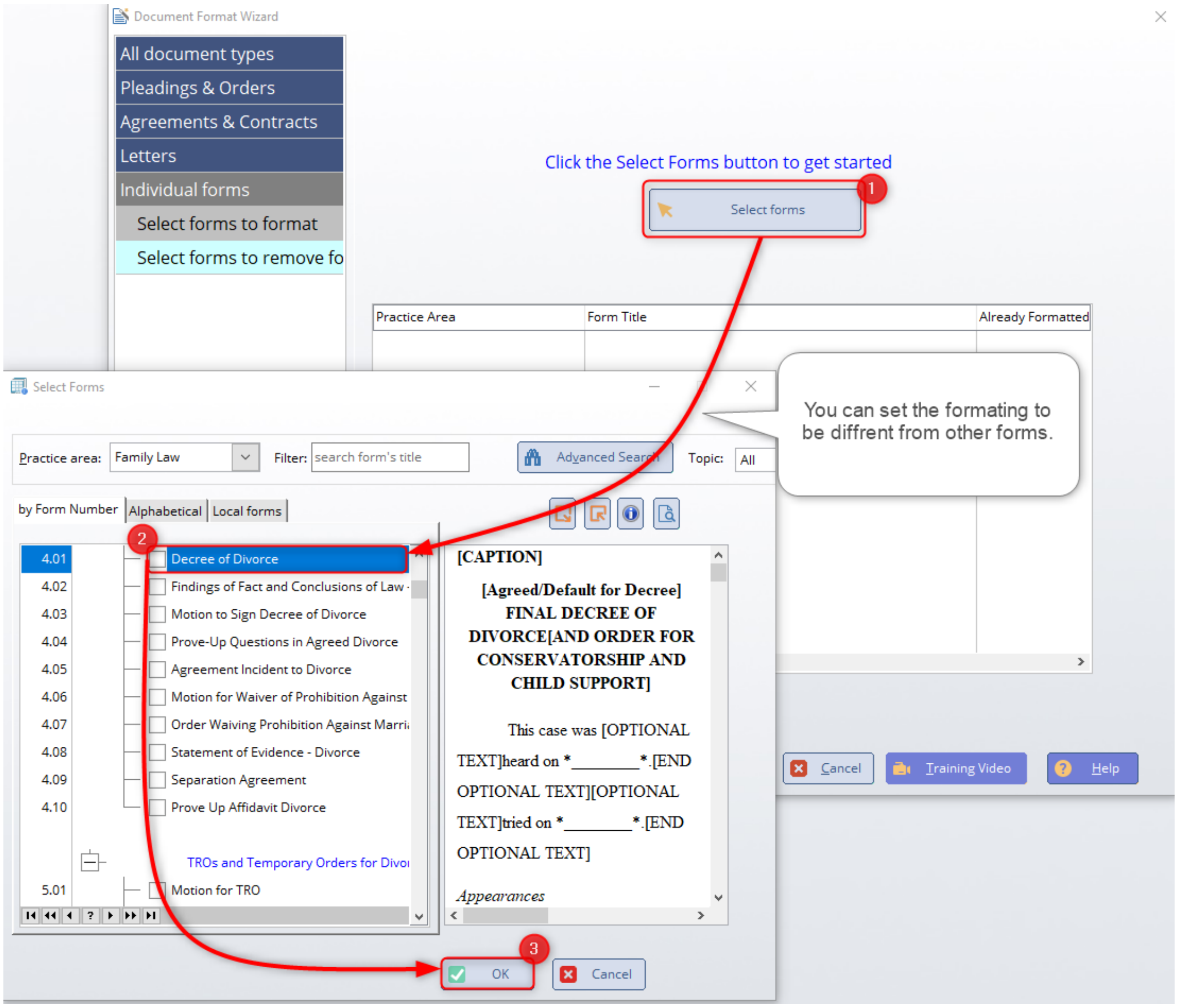
Letters

Click this option to set preferences for captions, headers and footers, margins, etc. that you want applied to all pleadings and orders that you assemble. NOTE: You are also given the option to set up a letterhead file that you want TXdocs to insert at the top of all of your letters



Individual forms

Throughout this window you will see a Preview button. Click this button to see a document formatted using your selections.


Document Format Wizard
All document types
Pleadings & Orders
Agreements & Contracts
Letters
Individual forms
Select forms to format
Select forms to remove fo
Click the Select Forms button to get started
Select forms
Practice Area
Form Title
Already Formatted
You can set the formating to be diffrent from other forms.
Select Forms
Practice area: Family Law
Filter: search form's title
Advanced Search
Topic: All
by Form Number
Alphabetical
Local forms
4.01 Decree of Divorce
4.02 Findings of Fact and Conclusions of Law
4.03 Motion to Sign Decree of Divorce
4.04 Prove-Up Questions in Agreed Divorce
4.05 Agreement Incident to Divorce
4.06 Motion for Waiver of Prohibition Against
4.07 Order Waiving Prohibition Against Marri
4.08 Statement of Evidence - Divorce
4.09 Separation Agreement
4.10 Prove Up Affidavit Divorce
TROs and Temporary Orders for Divo
5.01 Motion for TRO
[CAPTION]
[Agreed/Default for Decree]
FINAL DECREE OF DIVORCE[AND ORDER FOR CONSERVATORSHIP AND CHILD SUPPORT]
This case was [OPTIONAL TEXT]heard on *________*.[END OPTIONAL TEXT][OPTIONAL TEXT]tried on *________*.[END OPTIONAL TEXT]
Appearances
OK
Cancel
Training Video
Help
1
2
3

How to...

7 How to...

7.1 Bar Forms

Although TXdocs' family law forms are more comprehensive and provide a broad array of additional tools to help with your family law practice, a small number of attorneys still want to use the forms from the bar's Family Law Practice Manual because that is what they are used to. If you own a digital copy of the manual, this feature gives you the ability to import your bar forms into TXdocs to use in place of TXdocs' forms.

7 How to...

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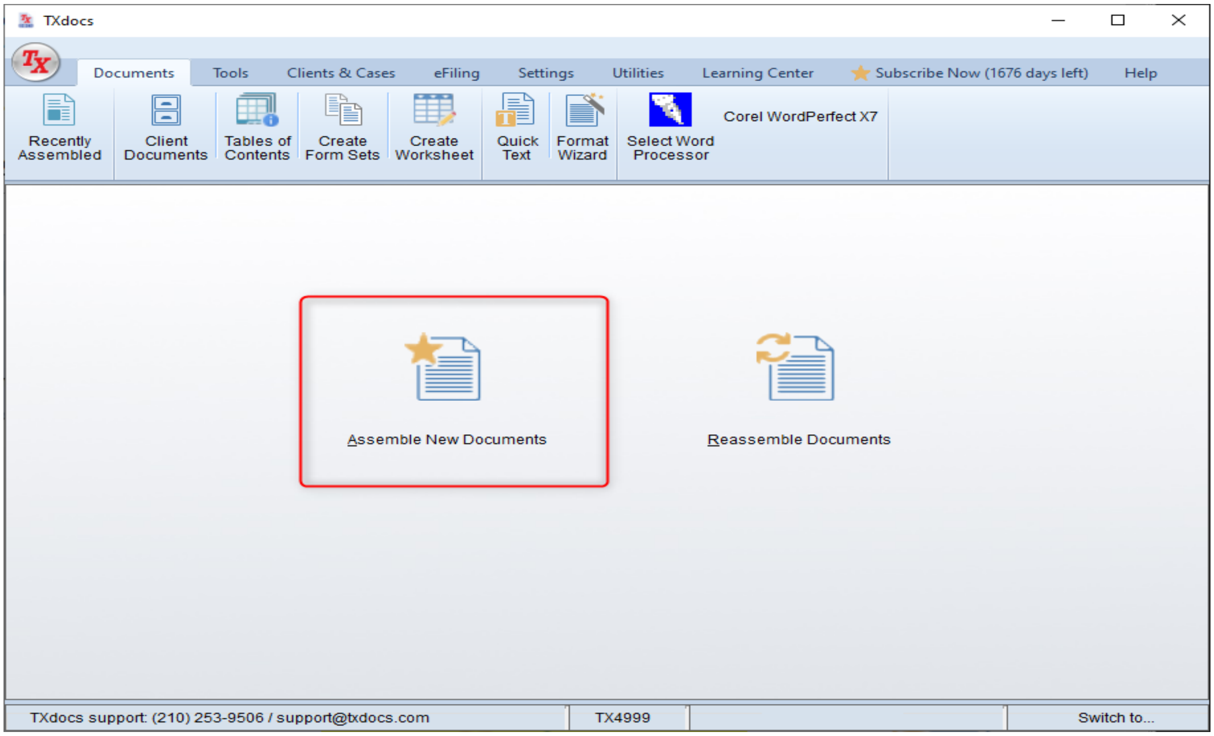
7.2 How to Assemble Documents

This help topic will cover the basics of assembling documents in TXdocs. Keep in mind that there are MANY time and effort saving features available in TXdocs and you really should take the time to learn about those. Most windows in TXdocs include Help buttons that will display help specific to the window you are looking at.

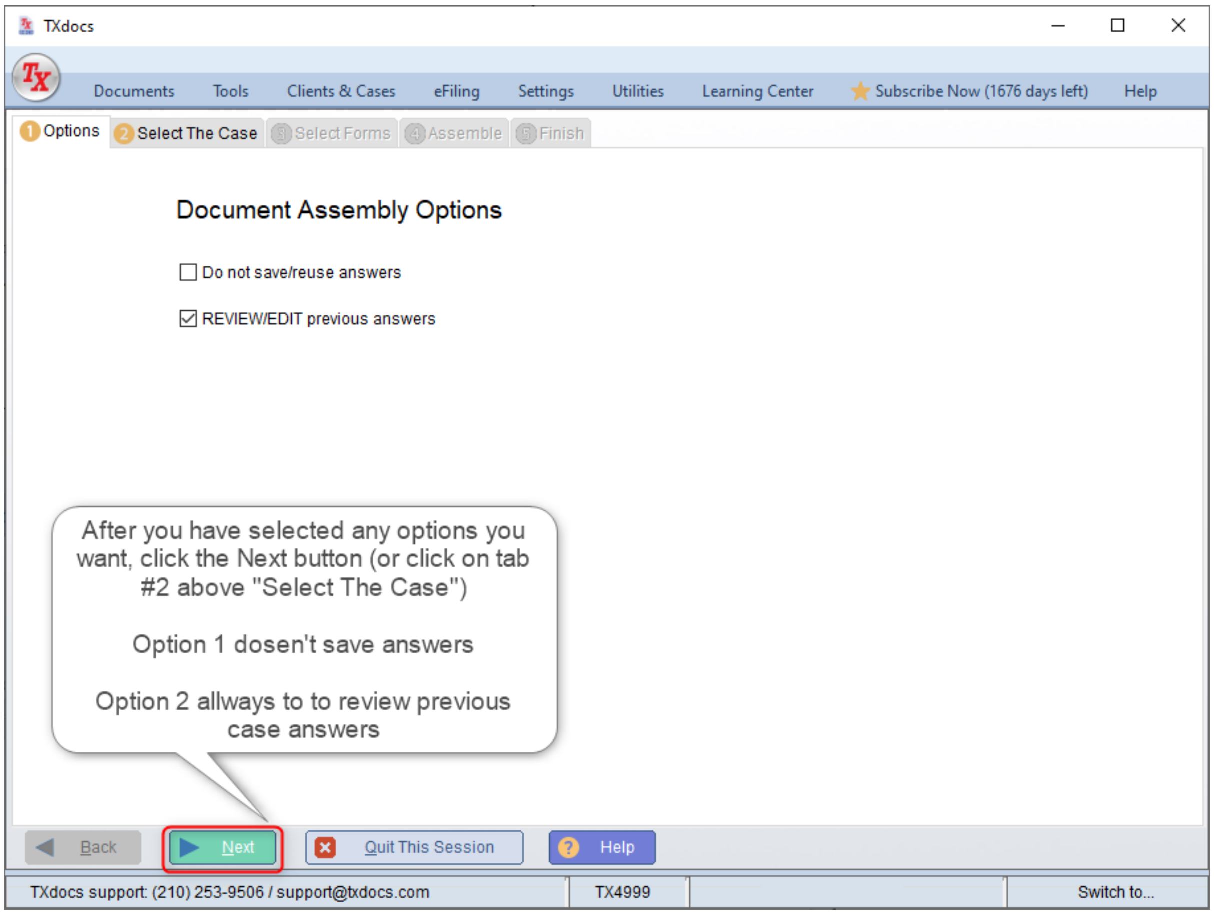
Skipping all the additional time saving details, here's a quick overview of how to assemble documents:

To get started, click the giant Assemble New Document in the middle of the main window



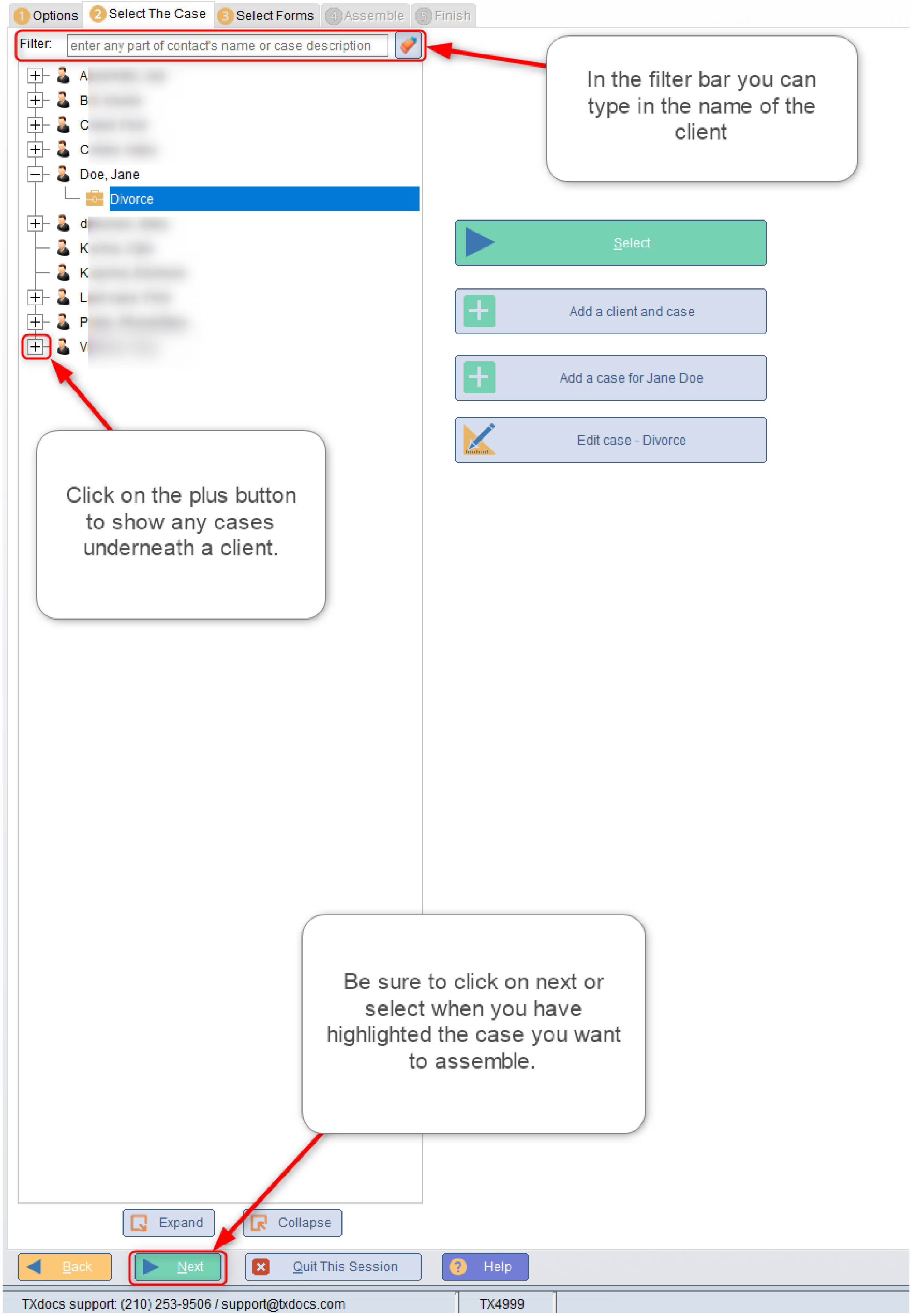
STEP ONE

Select any options you want. For the purposes of doing your first quick assembly, just leave the options as they are. Click the Next button at the bottom of the window.



STEP TWO

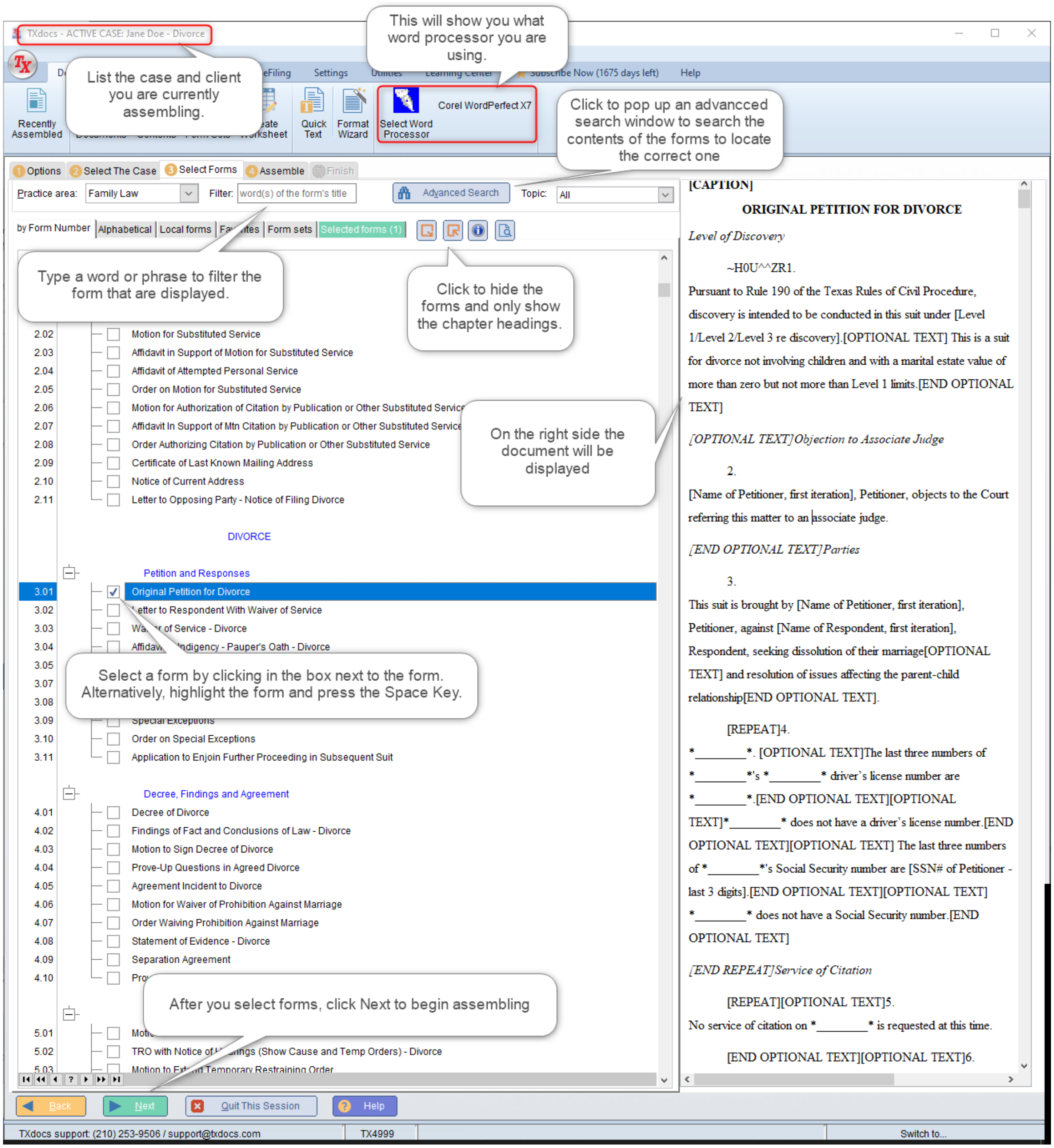
Select the case for which you want to assemble documents. NOTE: If you had selected "Do not save/reuse answers" as an option in the previous step, you would not need to select a case. But, if you do not select a case, your answers will not be saved and reused for the remainder of your case.


Options
Select The Case
Select Forms
Assemble
Finish
Filter:
enter any part of contact's name or case description
In the filter bar you can type in the name of the client
Doe, Jane
Divorce
Select
Add a client and case
Add a case for Jane Doe
Edit case - Divorce
Click on the plus button to show any cases underneath a client.
Be sure to click on next or select when you have highlighted the case you want to assemble.
Expand
Collapse
Back
Next
Quit This Session
Help
TXdocs support: (210) 253-9506 / support@txdocs.com
TX4999

STEP THREE

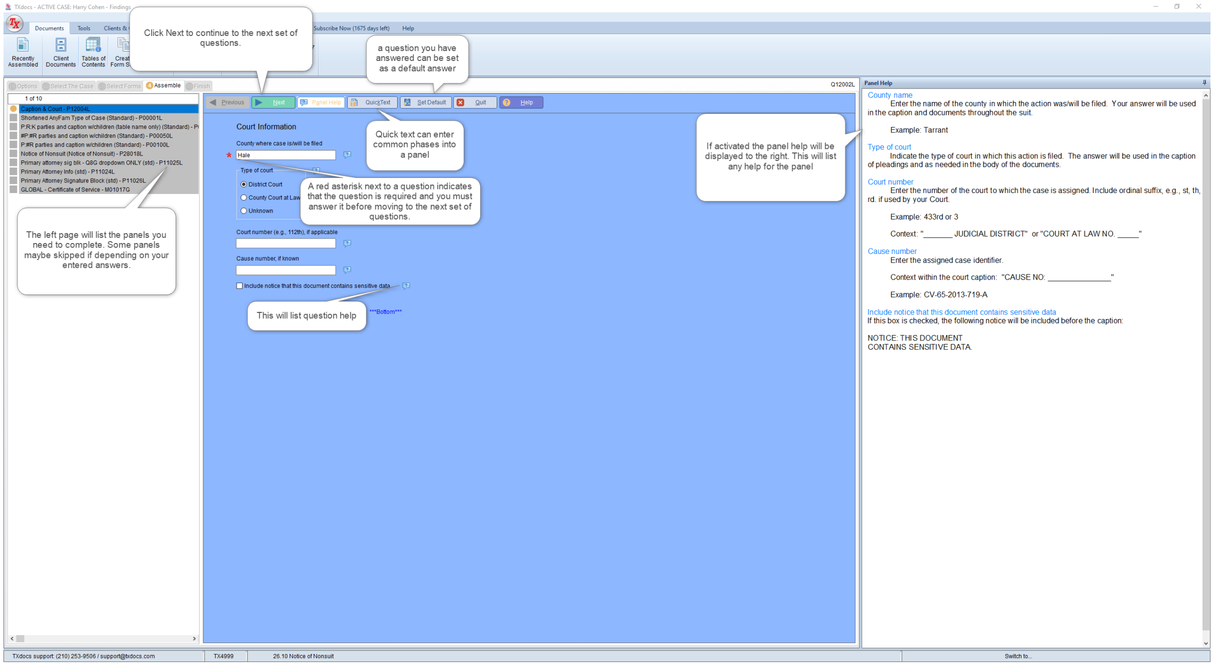
Select as many forms as you want to assemble right now by clicking on the box next to the form. After you have made your selections, click Next. (Note: there are any options available on this screen to help you find the forms you are looking for.)

NOTE: you don't have to type into the filter box to begin searching. Just start typing and TXdocs will start filtering your search.



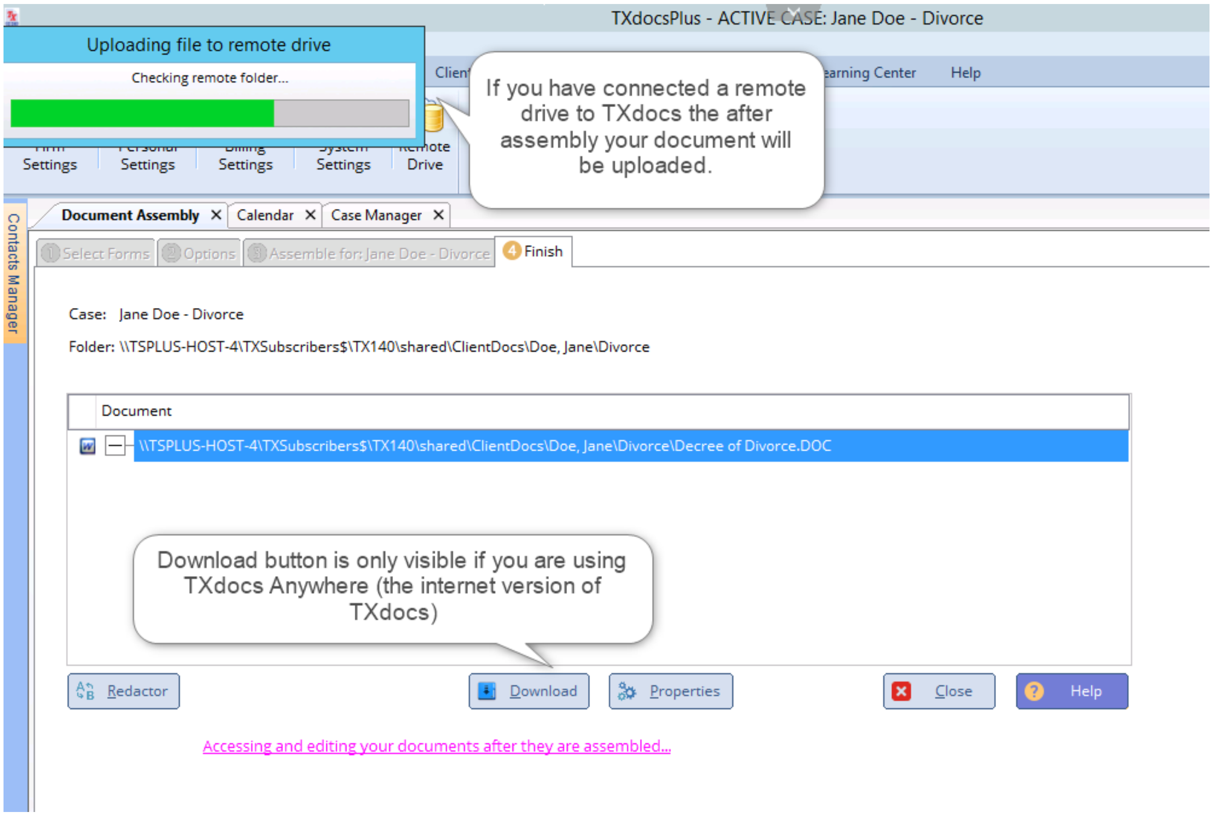
STEP FOUR

Answer the questions and then click Next to proceed to each set of additional questions. NOTE: A red asterisk next to a question indicates the question is required and must be answered before you can proceed.



STEP FIVE

After you have answered all questions, your document(s) will be assembled and then you will open them in or download them to your word processor. If you are using TXdocs Anywhere, you will download the documents to your computer for editing and printing.



7.3 How to Edit Templates

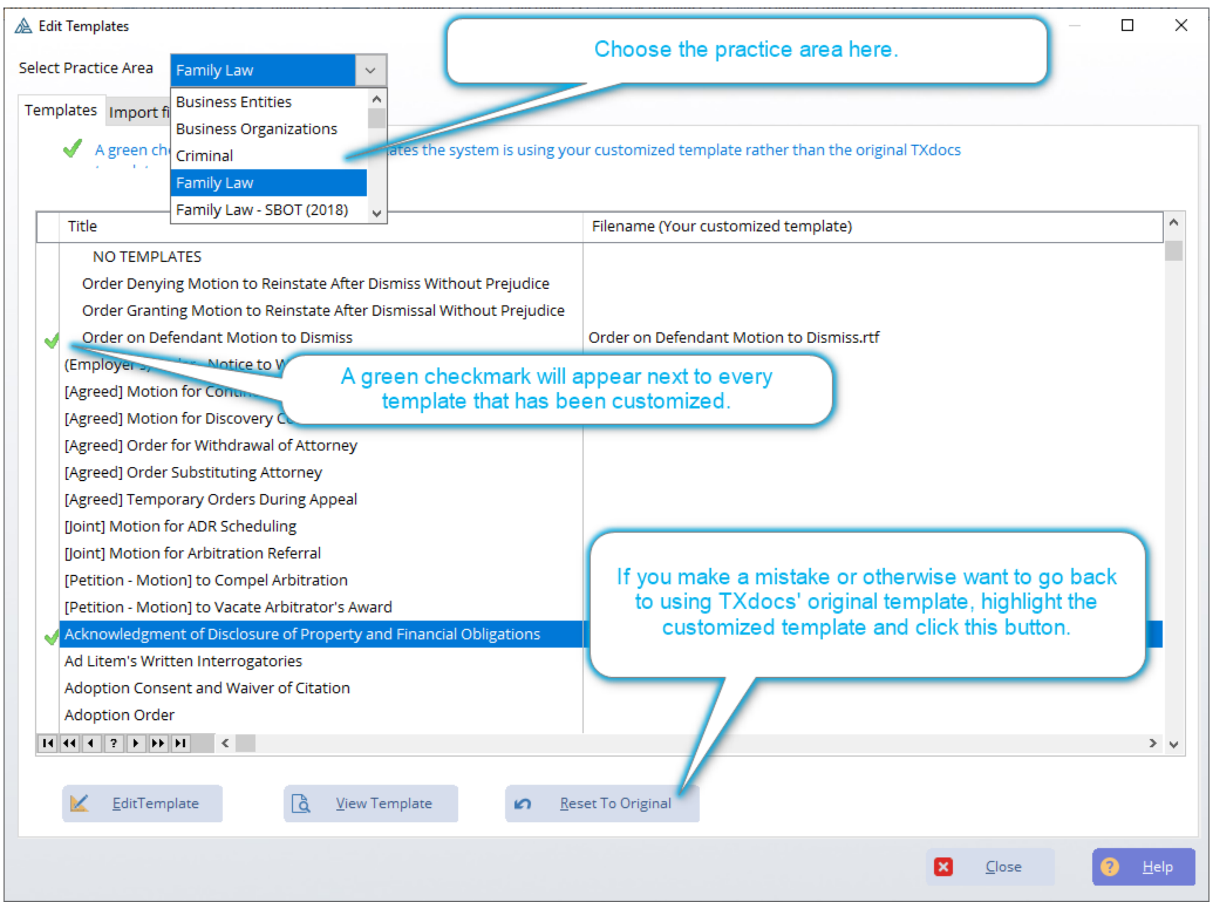
TXdocs contains a template for every form in our menu. These templates contain standard language that will be included in the documents you assemble. You can change these templates so that TXdocs will assemble a document using different language from what we provide. BUT, there are two very important points you should know before you make any changes:

1. If you change a template, TXdocs will no longer be able to update that template if the law changes. That means you will have to remember to go back into the changed template and update it yourself.

2. TXdocs only processes templates that are saved in the .rtf format. So, after you edit the template in your word processor, BE SURE to save it using the .rtf format.

To get started, select **Edit Templates** on the **Utilities** ribbon bar.

The Edit Templates window is where you select the template you want to edit.



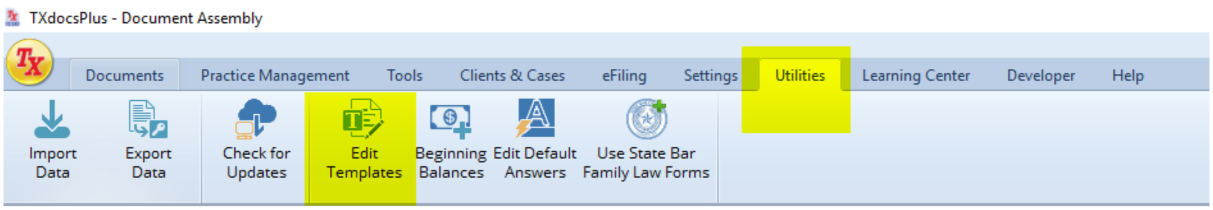
7.4 How to Edit Templates in Anywhere

TXdocs contains a template for every form in our menu. These templates contain standard language that will be included in the documents you assemble. You can change these templates so that TXdocs will assemble a document using different language from what we provide. BUT, there are two very important points you should know before you make any changes:

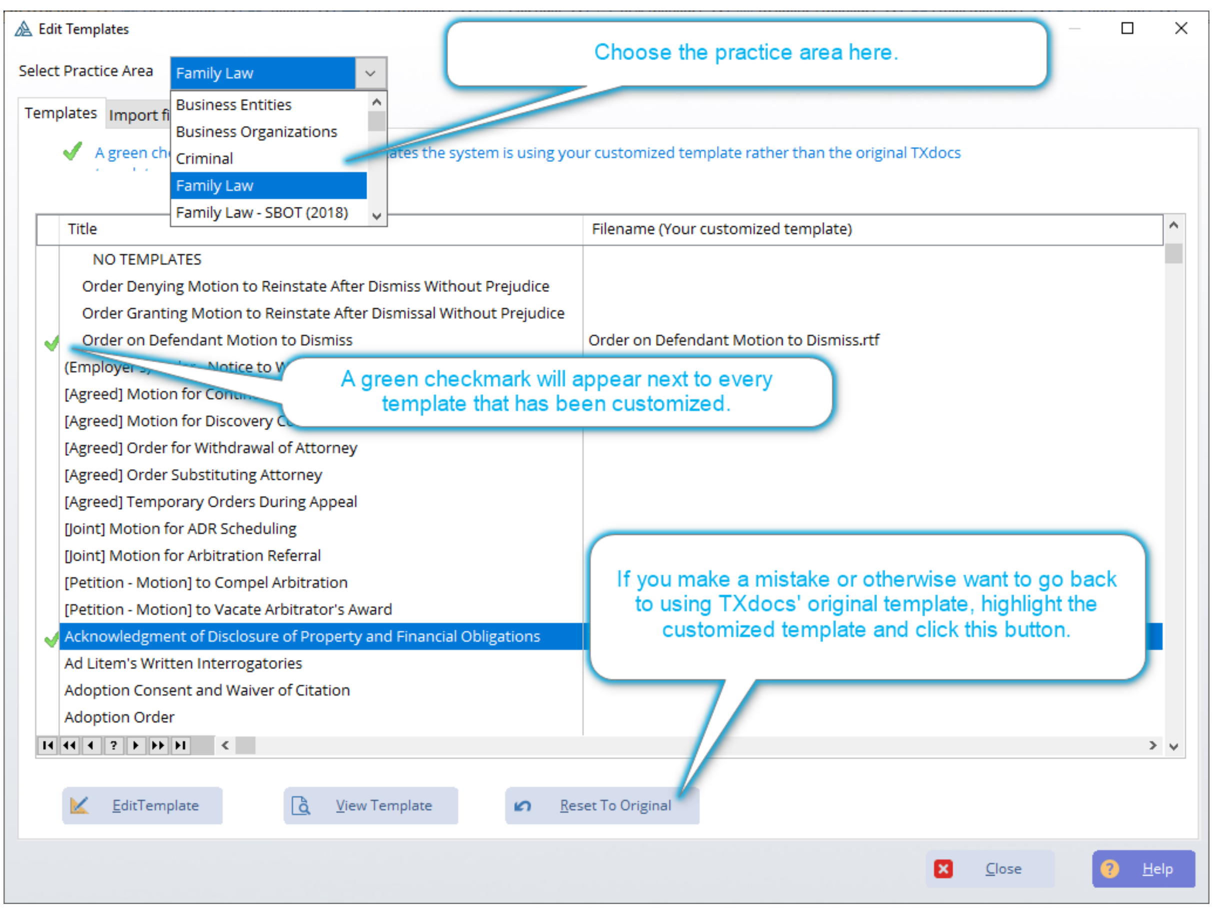
1. If you change a template, TXdocs will no longer be able to update that template if the law changes. That means you will have to remember to go back into the changed template and update it yourself.

2. TXdocs only processes templates that are saved in the .rtf format. So, after you edit the template in your word processor, BE SURE to save it using the .rtf format.

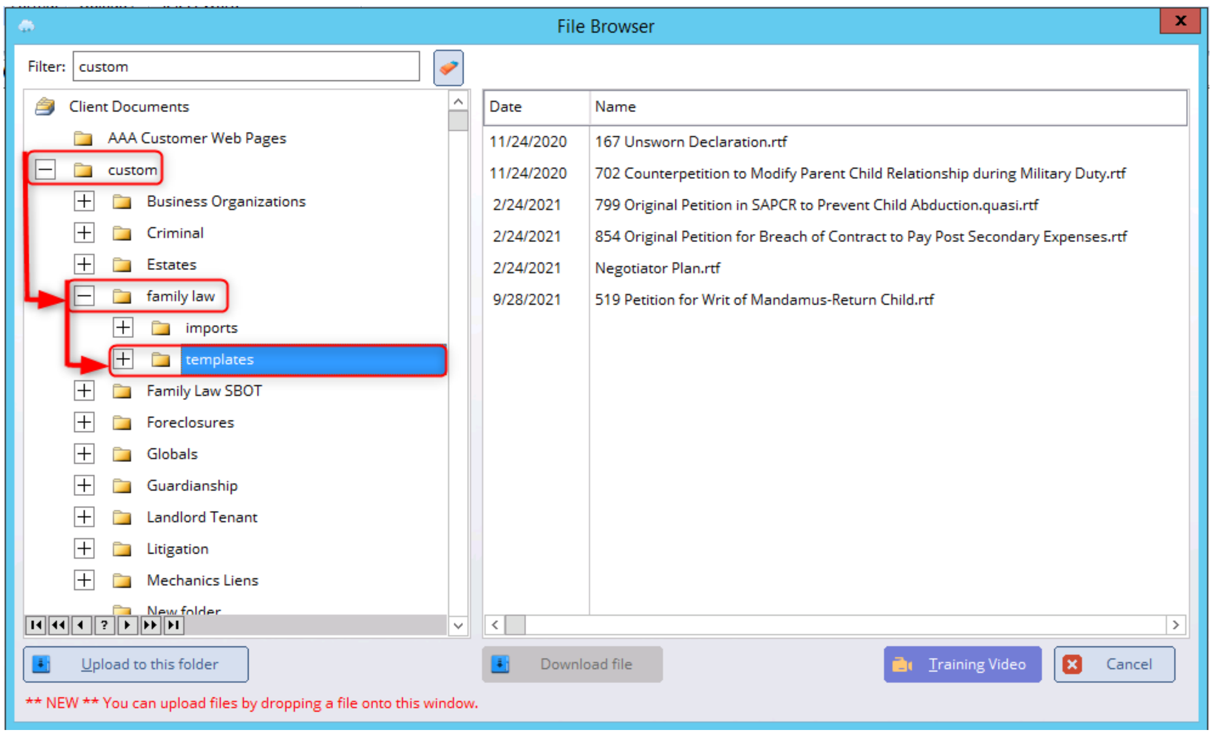
To get started, select **Edit Templates** on the **Utilities** ribbon bar.



The Edit Templates window is where you select the template you want to edit.



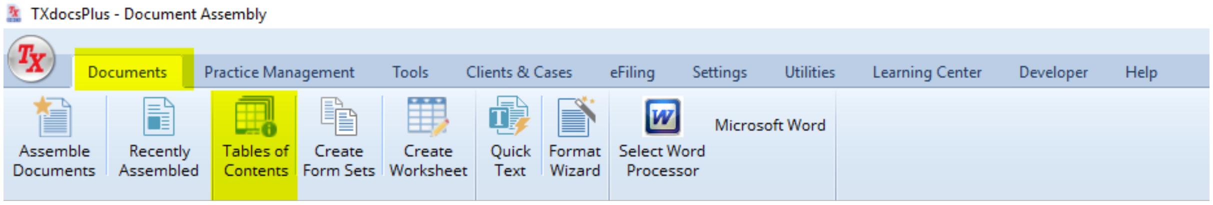
After clicking on Edit Template a copy of the template will be downloaded to your machine. When downloaded open the document in your word processor of choice. Change the Text to your preferred wording (***Do not rename the downloaded Document***) then upload the document back into TXdocs. Upload by dragging and dropping the document onto the TXdocs program. Select that you want to save the file in the folder Custom in the practice area that you downloaded the file from and in the templates sub folder. The changes you made to the template will be visible when you next assemble the edited document.



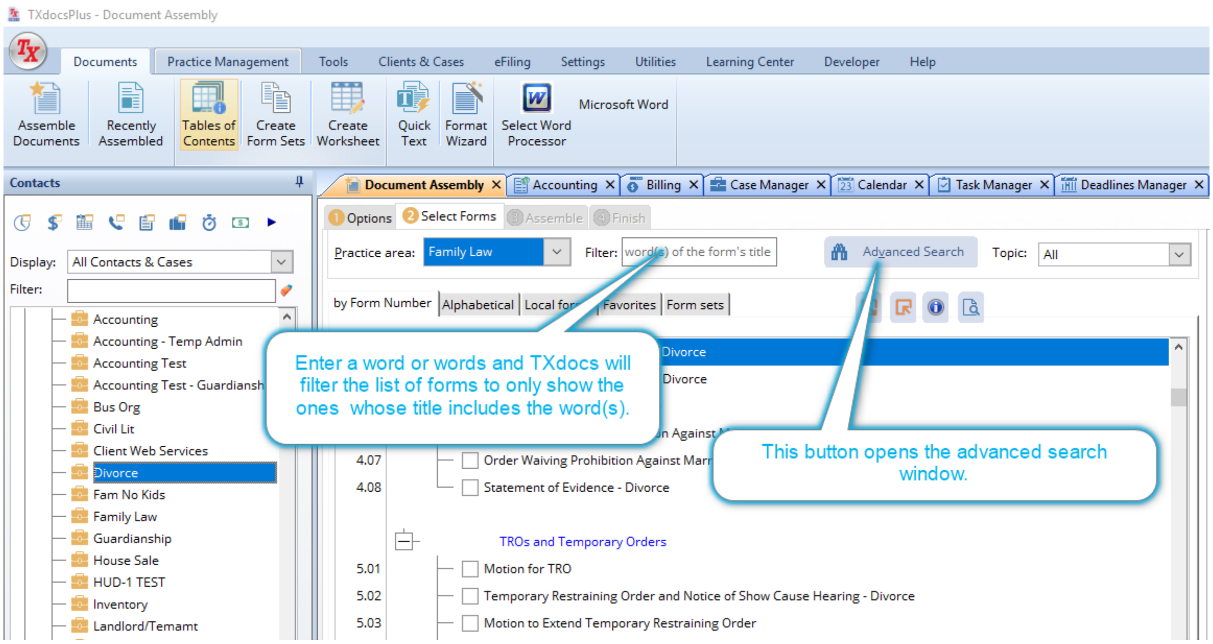
7.5 How to Find a Form

There are two places in TXdocs where you can search for forms: (1) in the **Table of Contents** option in the **Documents** ribbon bar tab and (2) in the **Select Forms** tab when you are starting a document assembly session.

Here is where you find the table of contents:



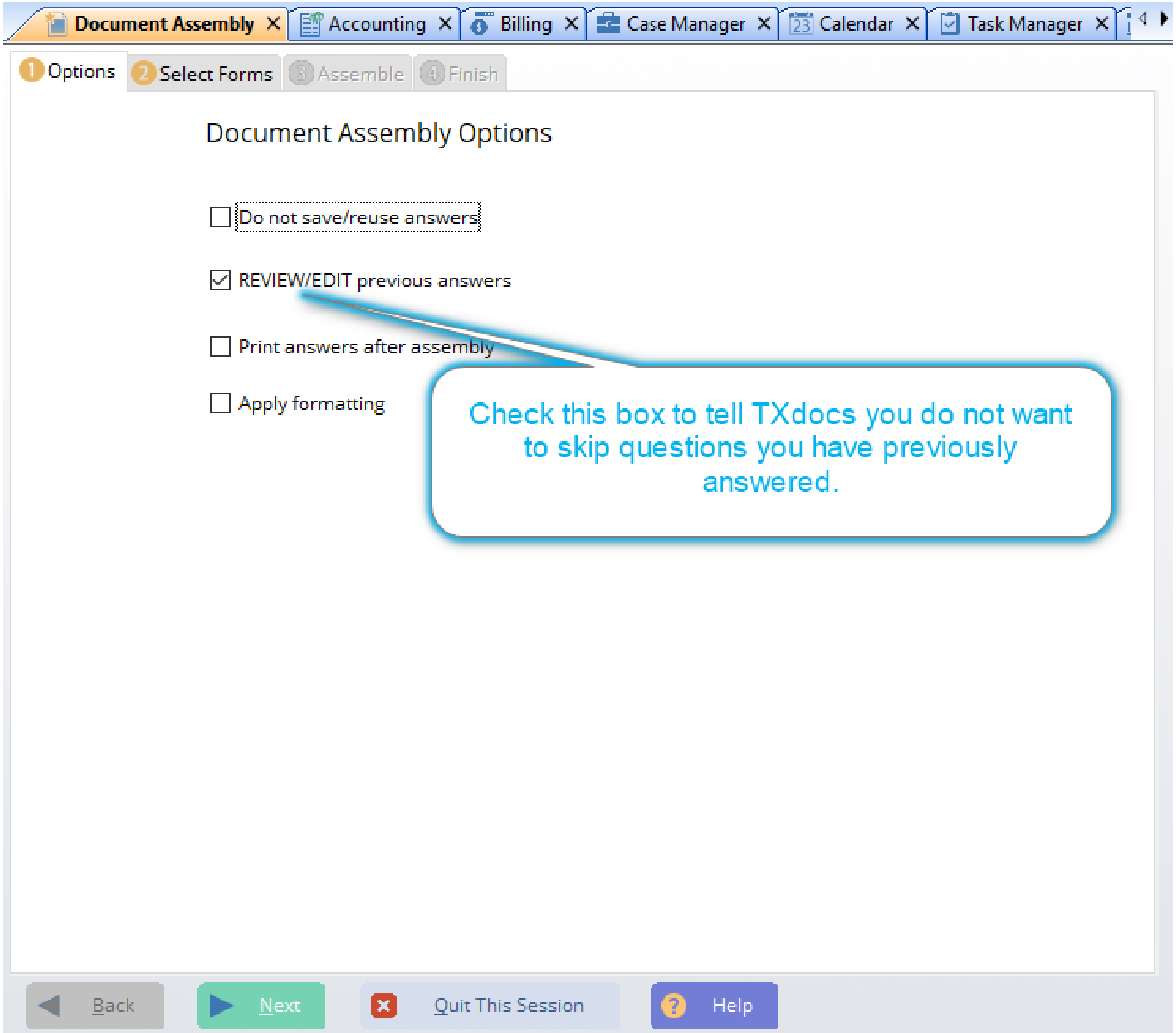
You can also search for forms when assembling documents.



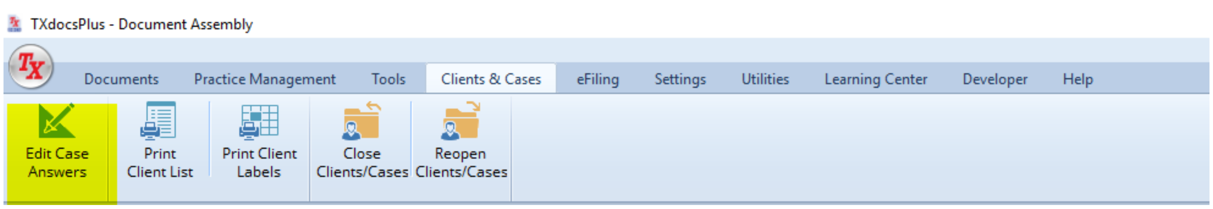
7.6 How to Edit Case Answers

Sometimes you will want to change answers that you previously entered for a case. For example, you may have misspelled a name or someone's address may have changed. There are two ways to change that information: (1) You can change the information while assembling another document for the case, or (2) You can click **Edit Case Answers** on the **Clients & Cases** ribbon bar.

To change an answer when assembling a new document, when you first start the assembly session select the **Review/Edit previous answers** option. When you see the question asked you will be able to change the answer. NOTE: Obviously, this only works if the answer you want to change is asked for the document you are assembling.



The other way to change an answer is to select **Edit Case Answers** on the **Clients & Cases** ribbon bar:



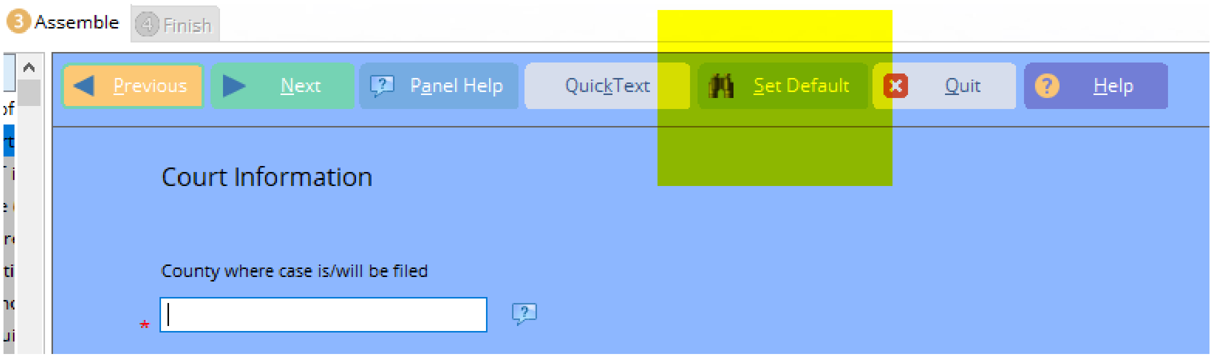
Edit Case Answers window

7.7 How to Set Default Answers

A default answer is an answer that will display the first time a question is asked in a case. If the default is correct, simply continue on without having to type anything. If not - just type over it. Setting default answers saves you time and effort, not to mention it relieves you from the tedious task of retyping common answers every time you add a new case.

If there is a question you see often, and if it usually has the same answer (for example, the county where the suit is filed), you should set your county as the default so you don't have to type it every time you start a new case.

The easiest way to set a default answer is to click the "Set default" button when you are answering the question during assembly. If there is already a default set for the question, the new answer you just typed/selected will be the new default answer. See the screen below.



To Edit default answers that have already been set, select **Edit Default Answers** from the **Utilities** ribbon bar.