



GETTING STARTED WITH INTERACTIVE LEGAL

InterActive LegalSuite™

Wealth Transfer Planning™

Essential Estate Planning™

Elder Law & Special Needs Planning™

Retirement Benefits Planning™

Firearms Trust Planning™

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Getting Started with InterActive Legal

The Getting Started with InterActive Legal software training guide was developed to provide all new users with guidance on basic navigation and functionality of InterActive LegalSuite practice systems. The guide provides instruction on a number of topics ranging from setting firm preferences, working within the InterActive LegalSuite hierarchy of clients, matters and documents, as well as, assembling documents in Word®. This guide serves as a supplement to ILS101GS Getting Started with InterActive Legal software training webinar. Please visit <https://interactivelegal.com/Training-Support.php> for contact our Training Specialist directly at training@interactivelegal.com to learn more about free software training webinars offered by InterActive Legal.

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Chapter 1. Launching InterActive LegalSuite (ILS)

Locate the ILS icon on your desktop, and double-click on the icon to open the Login Screen.



Figure 1.A – ILS icon

1.1 Login Screen

The ILS Login screen is illustrated below in Figure 1.B. Enter the user name and password assigned to you by your ILS Administrator and click **OK**.

The screenshot shows the 'ILS - Login' window. The title bar reads 'ILS - Login'. The window has a dark blue header with the InterActive LegalSuite™ logo. The main area is light blue and lists five planning categories: Wealth Transfer Planning™, Elder Law and Special Needs Planning™, Retirement Benefits Planning™, Essential Estate Planning™, and Firearms Trust Planning™. In the center is a 'Sign in' dialog box with 'User Name' (containing 'LMOSES') and 'Password' fields, and 'OK' and 'Cancel' buttons. A green arrow points from a text box 'Enter Login Credentials and select OK to continue to Home Screen' to the 'Sign in' dialog. At the bottom of the login window are three links: 'About your system', 'Save User Name' (with an unchecked checkbox), and 'Help with Login'. Three green arrows point from text boxes below to these links: 'Display database ID and current software version' to 'About your system', 'Check to Save User Name' to 'Save User Name', and 'Connect to Interactive Legal Online Support Portal' to 'Help with Login'.

Figure 1.B – Login Screen

1.2 Login Credentials for your ILS Practice Systems

User names and passwords for your ILS practice systems are maintained at your firm by an ILS Administrator. If you cannot locate your login credentials, and your firm's ILS administrator is not available, click the [Help with Login](#) link in the lower right corner of the Login screen to connect to an ILS Support representative in an online support session.

1.3 Other Login Credentials associated with your ILS subscription

Please note: You could have up to four separate login credentials associated with your ILS subscription. These login credentials are not related. Changing your password for one of the categories listed below does not change it for any of the other categories.

1. ILS practice system username(s) and password(s) are set and maintained by the ILS Administrator at your firm.
2. Login credentials for ILS online subscriber resources at www.InterActiveLegal.com are set and maintained by ILS.
3. Login credentials for the [InterActiveLegal Discussion Forums](#) are set and maintained by ILS.
4. Login credentials for the ILS Cloud™ environment are set by the subscriber and maintained by Amazon.

About your system

The **About your system** link displays your Database ID, current Framework Version number, Content Version number, and State Medicaid Values Version number.

- The **Database ID** is a unique identifier for your firm's ILS data. If you require ILS Technical Support and have multiple copies of ILS, the Database ID helps the support team understand which copy of ILS is impacted.
- The term **Framework** refers to the menus, tools, and utilities available in the ILS software.
- The term **Content** refers to the legal content, resources, and interviews in your ILS practice system.
- The **State Medicaid Values** are the Medicaid planning variables maintained for Medicaid qualification calculations in the Elder Law Planning practice system.

Save User Name

The **Save User Name** checkbox provides a utility to store your User Name for future sessions. If you check the box, then you will not have to enter your User Name each time you login. The User Name will prefill with your saved User Name.

Note: Your password is not saved using the **Save User Name** checkbox.

Help with Login

Select [Help with Login](#) to be connected to an InterActive Legal Support Representative via our online support portal. Representatives are available Monday-Friday, 8:30 - 5:30pm (EST).

Refer to Chapter entitled "Get Support" on page 40 of this guide for additional support options.

Chapter 2. Home Screen

When you log in to the ILS software, the framework **Home** screen is displayed as illustrated below in Figure 2.A. Use the **Home** screen as your hub for navigating to various locations, both within the software and online. The **Home** screen provides centralized navigation of the ILS framework.

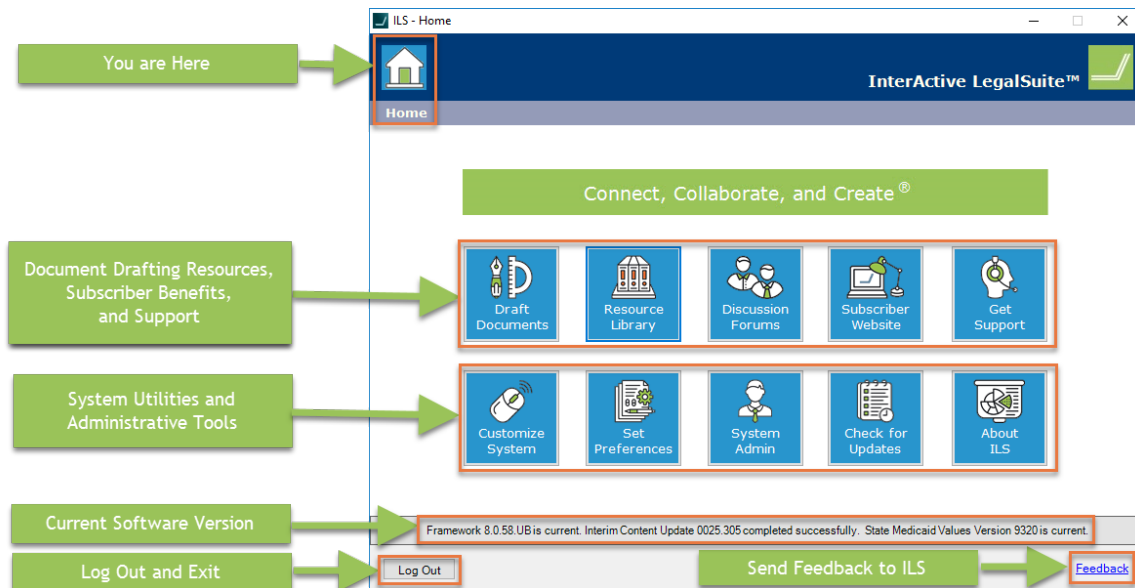
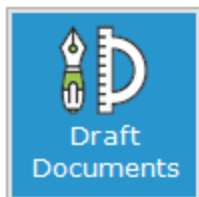


Figure 2.A – Home Screen

2.1 Document Drafting Resources, Subscriber Benefits, and Support

The top row of buttons on the **Home** screen provide access to drafting resources, subscriber benefits, and support options. The function of each button is described below.



Draft Documents opens the **SmartContent™** manager panel, which is where you will do most of your work. **SmartContent** manager contains tools and utilities to add/edit clients, matters, and documents created at your firm.

Refer to Chapter entitled "Draft Documents" on page 7 of this guide

IMPORTANT TRAINING NOTE: This guide serves as a supplement to the recommended software training class: **ILS101GS Getting Started with InterActive Legal**. Please visit <https://interactivelegal.com/Training-Support.php> or contact our Training Specialist at training@interactivelegal.com to learn more about free software training webinars offered by InterActive Legal.



The **Resource Library** contains documents to assist your firm such as checklists, intake surveys, sample documents, etc. It also contains links to online subscriber resources such as the ILS website and the ILS Legal Discussion Forums.



The **Discussion Forums** allow subscribers to collaborate on important planning and drafting issues with our authors, advisers, and other distinguished colleagues. The Discussion Forums require login credentials. Contact support@interactivelegal.com for assistance with discussion forum login credentials.



The **Subscriber Website** contains online resources such as the Legal Knowledgebase, Webinar Library, and Practice Management tools for InterActive Legal subscribers. The subscriber website requires login credentials. Contact support@interactivelegal.com for assistance with subscriber website login credentials.



The **Get Support** panel gives subscribers access to various help and support resources at InterActive Legal. See Chapter 10 Help & Support additional support options.

2.2 System Utilities and Administrative Tools

The second row of icons on the **Home** screen contain system utilities and administrative tools. This is where you will access customization tools, set your preferences, handle administrative tasks, check for updates, and bring up information about your program.



The **Customize System** panel contains tools to customize various items within InterActive LegalSuite. Users are given the ability to customize style sheets, profiles and templates.

Access to **Customize System** is restricted. Users must be given customization rights by the firm's ILS Administrator to access **Customize System**.

CUSTOMIZATION TRAINING: Subscribers interested in customizing their ILS practice system **MUST** attend customization training. View and register for customization training webinars at <https://interactivelegal.com/Training-Support.php> or contact our Training Specialist at training@interactivelegal.com to learn more.



The **Set Preferences** panel is where you set default software settings for document drafting, personal information, security, word processing, contact manager, and display.

IMPORTANT: The **Firm Preference Interview** must be completed by an attorney or paralegal at your firm before anyone at your firm begins drafting documents in InterActive LegalSuite. Refer to Chapter entitled "Firm Preference Interview" on page 1 of this guide for additional information on the **Firm Preference Interview**.

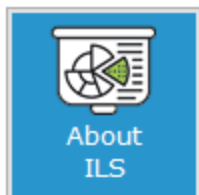


The **System Admin** panel provides tools for software administration such as licensing, users, and other miscellaneous administration functions.

In order to use the **System Admin** panel, the user must be designated as the ILS Administrator for his or her firm. Contact support@interactivelegal.com for assistance with the **System Admin** panel. If you are the only user at your firm, then you are designated as the System Administrator.



Check for Updates displays current content and framework versions, as well as information on the users designated to run updates. Contact support@interactivelegal.com for update assistance.



The **About ILS** panel contains basic information about the ILS software, such as authors, version number, and legal notices.

2.3 Current Software Version

The **Home** screen displays your current **Framework**, **Legal Content**, and **State Medicaid Values** versions so subscribers can easily see if their software is up-to-date.

- The term **Framework** refers to the menus, tools, and utilities available in the ILS software.
- The term **Content** refers to the legal content, resources, and interviews in your ILS practice system.
- **State Medicaid Values** are the Medicaid planning variables maintained for Medicaid qualification calculations in the Elder Law Planning practice system.

Select **Check for Updates** from the **Home** screen for additional information regarding software versions and update status.

2.4 Logout

The **Logout** button in the lower left corner of the **Home** screen logs the user out of their ILS practice system and exits the ILS software.

2.5 Feedback

The **Feedback** link in the lower right corner of the **Home** screen generates an email to ilsfeedback@interactivelegal.com. Subscribers are encouraged to use to use this link to provide feedback regarding the InterActive Legal framework.

Note: The Feedback link is not intended for support requests; please click the **Get Help** button the Home screen instead.

Chapter 3. Draft Documents



Draft Documents opens the **SmartContent** manager panel, which is where you will do most of your work.

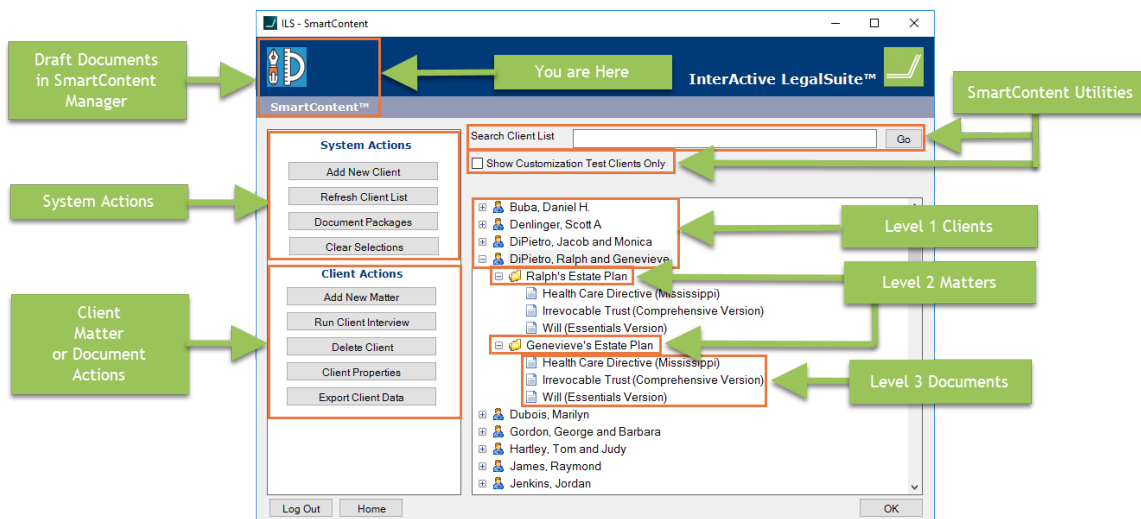


Figure 3.A – SmartContent

3.1 SmartContent

SmartContent manager displays a list of clients, matters and documents created at your firm and various actions available to the drafting attorney. Client, matter, and document data in **SmartContent** is arranged in a three-tier structure. Click on the plus sign to expose the next level of the three-tier structure. Click on the minus sign to hide a level. **SmartContent** levels are described in detail below.

Level 1 Clients

At the client level, enter information about the client and other parties associated with the client plan (i.e., spouse, children, guardian, etc.). The icon for the client level is a person. 

Level 2 Matters

At the matter level, you can create one or more matters for the client. You must create a separate matter for each spouse. The icon for the matter level is a file folder. 

Level 3 Documents

At the document level, you create the documents necessary for each matter. The icon for the document level is a piece of paper. 

3.2 SmartContent Utilities

SmartContent utilities include **Search Client List** and **Show Customization Test Clients Only**.

Search Client List

Type your search criteria into the **Search Client List** field at the top of the screen and then press **Go** to complete the search. **Clients**, **Matters**, and **Documents** that contain the search criteria will be highlighted.

Show Customization Test Clients Only

The **Show Customization Test Clients Only** checkbox displays an alternate list of clients, matters, and documents in the SmartContent manager. This alternate list is used to test custom material under development at your firm.

Access to **Show Customization Test Client Only** is restricted. Users must be given customization rights by their firms ILS Administrator to access customization features.

CUSTOMIZATION TRAINING: Subscribers interested in customizing their ILS software MUST attend customization training. View and register for customization software training courses at <https://interactivelegal.com/Training-Support.php> or contact one of our Training Specialists via email to training@interactivelegal.com to learn about customizing your ILS practice system..

3.3 System Actions

System Actions are actions not associated with a particular level in **SmartContent's** Client/Matter/Document tree. You always have access to **Add New Client**, **Refresh Client List** and **Document Packages**. The **Clear Selections** action is displayed when applicable.

- **Add New Client** opens a new client interview.
- **Refresh Client List** reloads clients, matters, and documents from the database into the SmartContent tree. In a system with multiple users, this will allow you to see work created by other users in the system after you first logged in.
- **Document Packages** allows users to create "packages" of commonly-used documents, making it easier and more efficient to add a group of documents to future Matters in one step. Available only to subscribers of the ILS Professional edition.
- **Clear Selections** clears the list of selected clients, matters and documents that were selected for batch processing (by double-clicking on an item).

Please note: See Chapter entitled [Document Packages](#) for detailed instructions on how to create and manage Document Packages.

3.4 Client, Matter, and Document Actions

Client, **Matter**, and **Document Actions** are displayed only when a **Client**, **Matter**, or **Document** is selected in **SmartContent**. For example, if a client is selected in **SmartContent**, then **Client Actions** are displayed in the panel to the left.

There are two ways to access **Client**, **Matter**, and **Document Actions** from **SmartContent**.

1. Select a **Client**, **Matter**, or **Document** and then select the desired action from the **Available Actions Panel** on left.
2. Use the right mouse button on any **Client**, **Matter**, or **Document** and then select the desired action from the **Available Actions** in the menu item list.

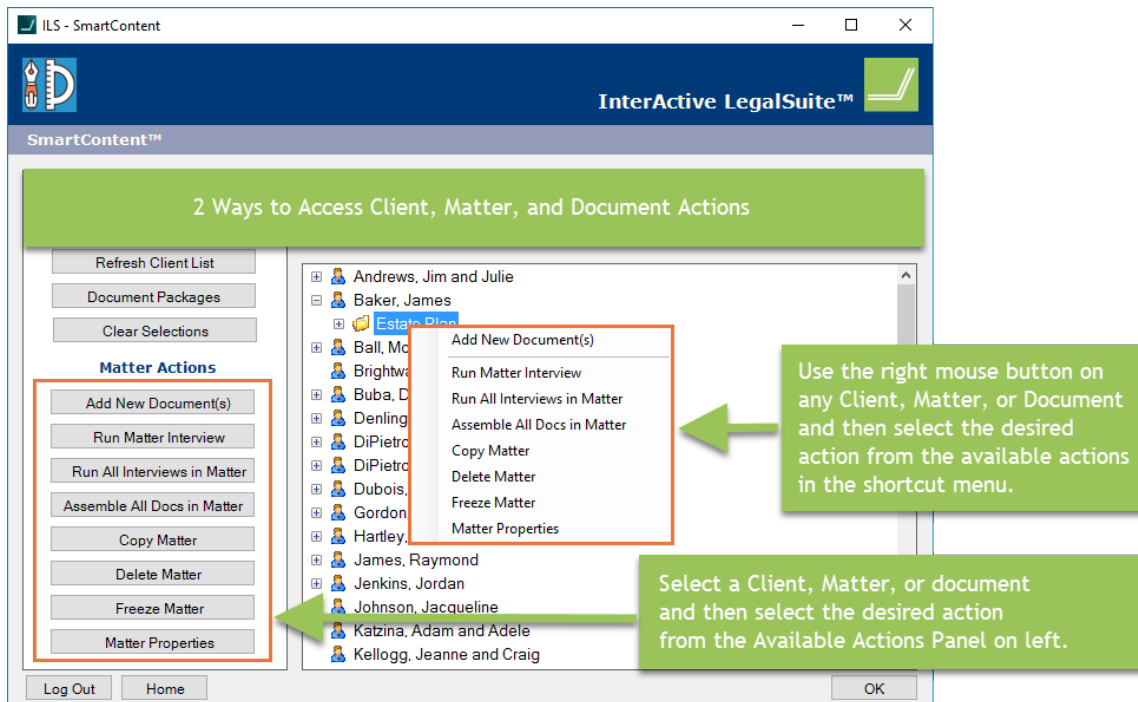


Figure 3.B – Client, Matter and Document Actions

Client Actions

If a client is selected in **SmartContent**, then the following **Client Actions** are displayed under **System Actions**.

- **Add New Matter** opens a new matter interview.
- **Run Client Interview** opens the selected client's interview for review and editing.
- **Delete Client** deletes the selected client.
- **Client Properties** are the Client Name, Client Number, and Notes entered when the client was added to **SmartContent**. This utility allows the user to edit these properties; for example, they can change the spelling of the client's name, or change the name altogether.
- **Export Client Data** creates a Tab Separated Variable (TSV) file named "Client Name.tsv" in the ILS "CLIENTS" subfolder. The TSV file can be imported into a spreadsheet or other software that supports TSV import.

Matter Actions

If a matter is highlighted in **SmartContent**, then the following **Matter Actions** are displayed under **System Actions**.

- **Add New Document(s)** opens the **Add Document Tree** to add one or more documents to this matter.
- **Run Matter Interview** opens selected matter interview for review and editing.
- **Run All Interviews in Matter** runs interviews for all documents in a matter consecutively.

- **Assemble All Docs in Matter** assembles answers and ILS templates for all the document(s) in the selected matter into word processing document(s) in consecutive order.
- **Copy Matter** creates a copy of the selected matter and underlying documents.
- **Delete Matter** deletes the selected matter.
- **Freeze Entire Matter** freezes the matter and documents inside the matter so they cannot be edited (toggles between freeze and unfreeze).
- **Matter Properties** are the Matter Name, Matter Number and Notes entered when the matter was added to **SmartContent**. This utility allows the user to edit these properties.

Document Actions

If a document is highlighted in **SmartContent**, then the following **Document Actions** are displayed under **System Actions**.

- **Add New Document(s)** opens the **Add Document Tree** to add one or more documents.
- **Run Document Interview(s)** opens the selected document interview(s).
- **Assemble Document(s)** assembles answers and ILS templates into word processing document(s).
- **Open Assembled Document** opens the last version of the documents saved in ILS. Refer to Chapter entitled "ILS Word Processing Document" on page 33 of this guide to learn more about saving your ILS word processing document.
- **Delete Document** deletes the selected document and interview.
- **Freeze Document** freezes the document so it cannot be edited (toggles between freeze and unfreeze).
- **Document Properties** are the Document Name and optional notes entered when the document was added to **SmartContent**. This utility allows the user to edit these properties.

Chapter 4. Features Common in all InterActive LegalSuite Interviews

InterActive LegalSuite utilizes interviews to capture information about your firm, clients, matters, and documents. This chapter contains basic instructions to navigate and complete an InterActive LegalSuite interview.

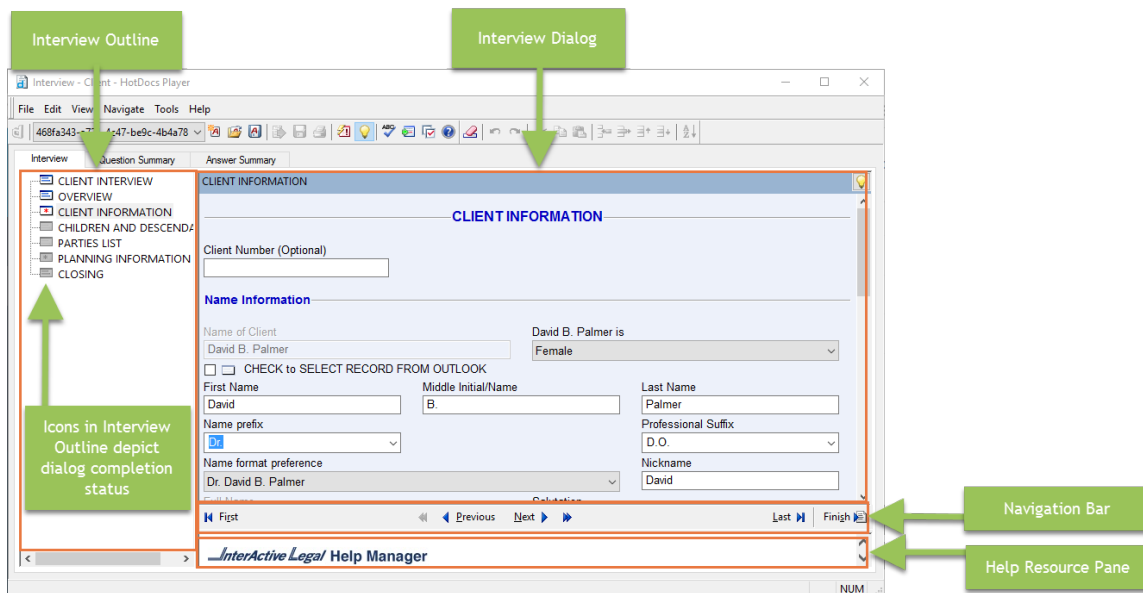


Figure 4.A – ILS Interview

4.1 Interview Outline

The Interview Outline on the left side of the screen lists all dialog screens available in the interview. As you navigate through the Interview dialogs, new dialogs may appear if the answer you provide triggers another question. The available dialog screens change based on your answers to interview questions. This is a road-map of all the questions that are relevant.

Icons depict dialog completion status

The icons next to the dialog names in the Interview Outline depict the completion status of the dialog. As you proceed through the interview, dialog icons in the interview outline change appearance, indicating whether the questions in the dialog are partially answered, completely answered, missing required answers, etc.

- Boxes with blue lines  indicate the dialog screen is completely answered.
- Boxes with gray lines  indicate the dialog screen is partially answered.
- Boxes with red asterisks  indicate the dialog requires answers before you proceed.
- Boxes that are grayed out  indicate the dialog screen is not ready for input

4.2 Interview Navigation

There are two ways to navigate through the ILS interviews. You can use the **Interview Outline** or the **Navigation Bar**.

Interview Outline

Click on the dialog name in the **Interview Outline** to navigate to that dialog.

Navigation Bar

The **Navigation Bar** at the bottom of the screen contains the following navigation buttons.

- **First** — Click this button to go to the first dialog available in the interview outline.
- **Previous Unanswered Dialog** — This button appears as left facing double arrows. Click this button to display the closest prior dialog in the interview outline with unanswered questions.
- **Previous** — Click this button to go to the previous dialog in the interview outline.
- **Next** — Click this button to go to the next dialog in the interview outline.
- **Next Unanswered Dialog** — This button appears as right facing double arrows. Click this button to display the closest subsequent dialog in the interview outline with unanswered questions.
- **Last** — Click this button to go to the last dialog available in the interview outline.
- **Finish** — Click this button to finish going through the interview outline and view the document in the Document Preview/Form Document tab, your word processor, or the HotDocs Filler.

TIP: The double arrows next to the "previous" and "next" navigation buttons will take you to the "previous" or "next" dialog screen with unanswered questions. This is helpful when searching for missing answers in an interview.

4.3 Required Fields

Figure 4.B – Required Fields

All required fields in an ILS interview are highlighted in **RED**. The system will not allow you to proceed to the next dialog screen unless all required fields are answered. If you wish to complete the interview without answering the red required fields, please follow our suggestions below:

- **Required Text Fields:** If the required field is a text field (i.e., City) and you wish to complete the interview without entering the required information, you could enter an underscore in the required field as a placeholder. The underscore placeholder will appear in your assembled document marking the place to type the necessary text directly into your word processing document.

- **Required Numeric Fields:** If the required field is a numeric field (i.e., social security number) and you wish to complete the interview without entering the required information, you could enter a numeric placeholder such as 999-99-9999 into the required field. The numeric placeholder will appear in your assembled document marking the place to type the necessary number directly into your word processing document.
- **Required Logic Fields:** If the required field is a logic field (i.e. Client is a U.S. Citizen), **we recommend you exit the interview and return to complete your input when you have the required information.** Logic fields are used by the system to determine the text in your assembled document. For example, the U.S. Citizen question determines whether the QDOT language is included in your document. If the interview answers do not accurately reflect your clients facts, then your document will not contain the correct language. To close the interview, select the close "x" in the upper right hand corner of the title bar. This will save your answer set and exit the interview.

Please note: If you leave an ILS interview with unanswered required fields, you will need to re-run the interview and complete all required fields before assembling your documents.

4.4 Drop-down boxes

There are two types of drop-down boxes in the ILS interview. The "Select Only" drop-down box and the "Select or Type" drop-down box.

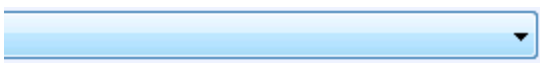
Select Only Drop-down box	Select or Type Drop-down box
	
The Select Only drop-down box requires selection from the list provided by InterActive Legal. The user cannot type something other than what appears in the drop down box.	The Select or Type drop-down box allows for custom input by the drafting attorney. The attorney can "select" one of the answers provided by InterActive Legal or they can "type" their own answer into the drop-down box.

Figure 4.C – Drop-down boxes

4.5 Repetitive Dialogs and the Add Another button

Repetitive dialogs are used throughout the ILS interviews. They allow input of multiple records for items such as children and co-executors. Repetitive dialogs are added using the Add Another button at the bottom of the dialog screen.

The Add Another button is often restricted by a limit provided by the user. For example: the number of children that can be entered in the repetitive dialog for children is limited to the number of children indicated on the "Children and Descendants" dialog in the Client Interview. The Add Another button will be grayed out when that limit is reached.

Other repetitive dialogs such as the Parties List are not limited. The Add Another button on the parties list will never gray out. Subscribers can add as many parties as they would like in the Client interview.

Figure 4.D – Add Another button

4.6 Deleting Rows in a Repeat Table

Repeat tables are used in many ILS dialogs where repetitive information is entered in a table form. If you decide not to use the information you entered into a repeat table, then you **MUST** delete the rows of information before changing the number of rows to zero. If you do not delete the unwanted rows, then the information typed in the table will appear in your assembled document.

	Gift Given To:	Terms of Gift	Description of Gift
1	Malcolm Palmer	Unconditional	Coin Collection
2	Mary Jean Robinson	Unconditional	Artwork from Beach House
3			

Figure 4.E – Deleting Rows in a Repeat Table

4.7 Completing the Interview

You may review your answers by clicking on the “previous” and “next” buttons or navigate using the Interview Outline on the left side of the screen.

Once you are satisfied with the answers on all screens, click “Finish” and you will be returned to the SmartContent manager panel. If you are on the last screen of the interview, you can click next and it will also close the interview and return to the SmartContent manager panel.

4.8 Help in the ILS Interview

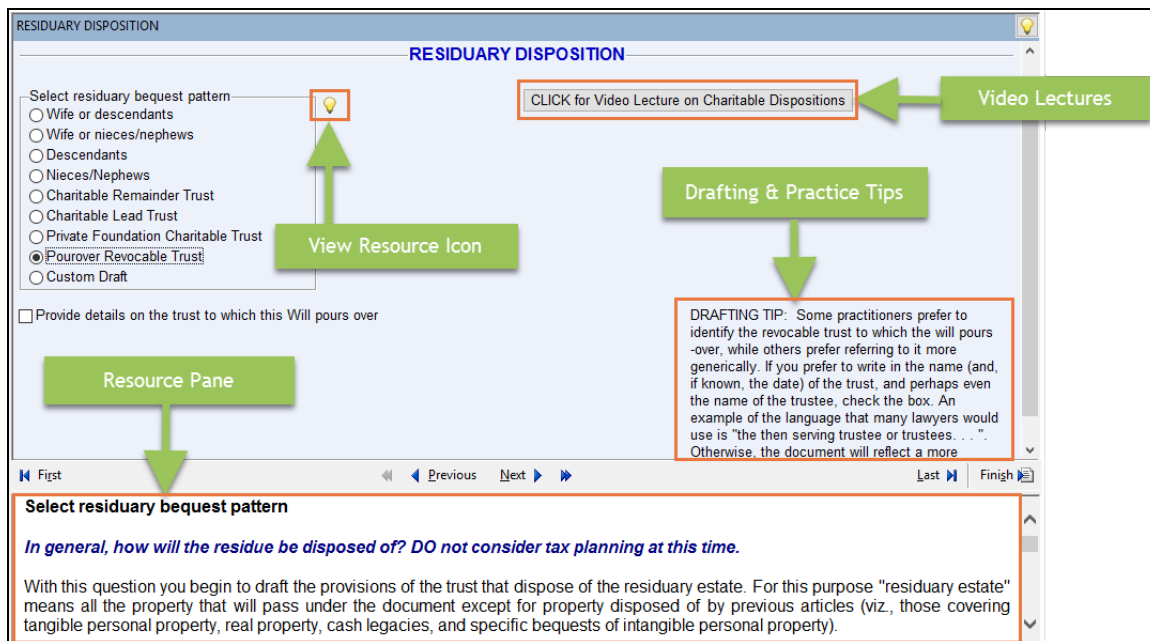


Figure 4.F – Help in the ILS Interview

Help is available in ILS interviews in many forms through the Resource Pane, View Resource Icon, embedded video lectures, Drafting Tips and Practice Tips.

Help Resource Pane & Icon

Field Level Help commentary is available from both the Resource Pane and the View Resource Icon in the ILS interview. Both methods of displaying the Help Manager produce the exact same Help commentary. The Resource Pane is located at the bottom of the dialog screen. The View Resource icon appears to the right of the selected field. The View Resource icon appears as a yellow light bulb graphic.

Drafting and Practice Tips

Your ILS practice system provides a unique "tutorial mode" that will automatically display additional help for the document interviews. These drafting tips appear if you select "tutorial mode" as a preference. Tutorial mode can be turned on and off as necessary from both the firm and matter interviews.

Practice tips appear as additional help from the ILS authors throughout our interviews. They provide guidance on various legal options in the ILS interviews.

Video Lectures

Video Lectures are embedded throughout our interviews. Recorded video lectures open in a separate window and do not interfere with the drafting process. When the video is complete, simply close the window and continue drafting.

Chapter 5. Set Firm Preferences



The Firm Interview gathers information generally applicable to all documents prepared by a particular firm. The preferences are set in advance so users will not have to answer these questions each time they run an interview. They are designed to minimize information entry time and allow for consistency in your practice.

IMPORTANT SETUP REQUIREMENT: The Firm Preference interview **MUST** be completed by an attorney or paralegal at your firm before you begin drafting documents with InterActive LegalSuite.

Note that some of the questions on this dialog are global in nature. That means that you answer the question **ONE** time and that answer will apply for **ALL** interviews. Other questions in the firm interview are set as "initial" or "default" answers, but allow you to override that default answer for a particular document. For example, if you set your default Corporate Fiduciary to First National Bank, N.A., when asked about corporate trustees in an interview, First National Bank will be automatically filled in as your "default" answer, but you can change that answer easily.

5.1 Add/Edit Firm Drafting Preferences

To add/edit firm drafting preferences, select **Set Preferences** from the **Home** screen. Then select the **Firm Preferences** link to run the Firm Interview.

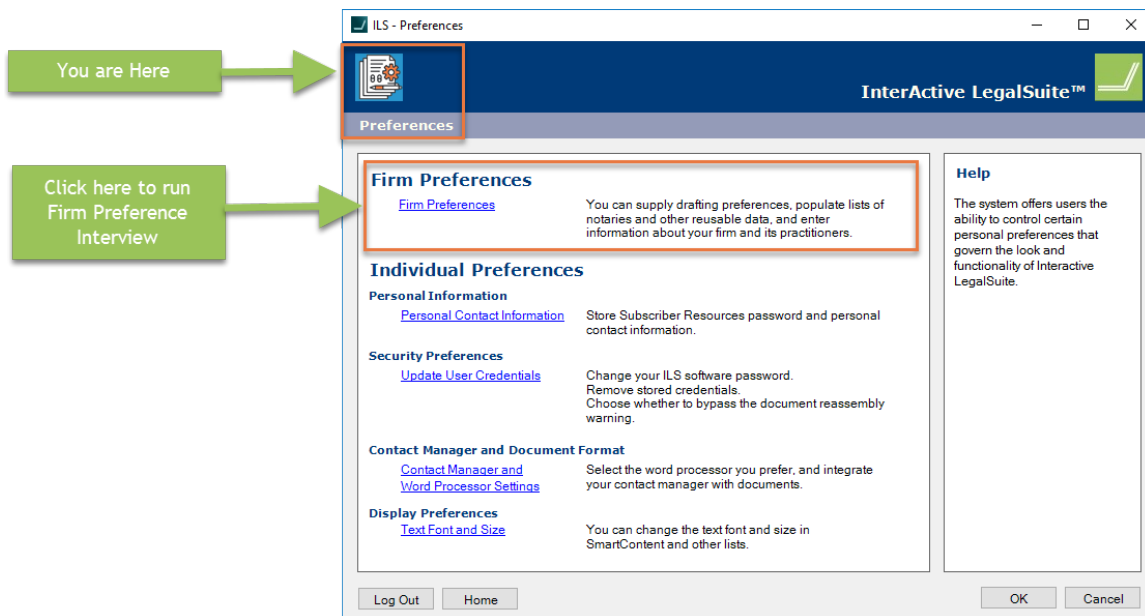


Figure 5.A – Review Drafting Preferences

5.2 Features common in all ILS Interviews

Refer to Chapter entitled "Features common in all ILS Interviews" on page 17 of this guide to learn more about interview navigation, required fields, drop down boxes, repetitive dialogs, repeat tables and help resources within the ILS Interview.

5.3 Firm Interview Dialogs

Overview Dialog

The Overview dialog screen displays a description of the interview and the author's recommendations.

Other Firm Interview Dialogs

- **Counties/ Jurisdictions (Optional):** Enter the names of counties and other jurisdictions (e.g. "Nassau County", "Bergen Township") in the surrounding area. This information is used to build a drop down box of counties.
- **Corporate Fiduciaries (Optional):** Specify the name of the corporate fiduciary as it is to appear in the instrument, as well as, the name of the individual at the institution who can be contacted for information, whether the fiduciary has a corporate seal and the entity type. This information is used to build a drop down box of corporate fiduciaries.

Drafting Preferences Dialog

IMPORTANT NOTE REGARDING FIRM PREFERENCES: Preferences set on the Drafting Preferences dialog screen will be used as default answers in document interviews where appropriate. These answers may be changed on a matter-by-matter basis in the matter interview or as desired when preparing a particular document.

Interview Options

- **Tutorial Mode:** The system provides a unique "tutorial mode" that will automatically display additional help in ILS interviews. Tutorial mode can be turned on and off as necessary when running a matter interview.

Customization Options (Professional Version Subscribers ONLY)

You **SHOULD NOT** select any **Customization Options** until you have actually customized a letterhead and memo head; if it is selected without these customized elements in place, your letter and memo documents will not assemble.

CUSTOMIZATION TRAINING: Subscribers interested in customizing their ILS practice system **MUST** attend customization training. View and register for customization training webinars at <https://interactivelegal.com/Training-Support.php> or contact one of our Training Specialists at training@interactivelegal.com to learn more.

- **Include custom element templates in documents:** This option allows you to default to any customized element templates that you have developed for your firm.
- **Use custom letter/memo head (for Letters and Memos):** This option allows you to default to any customized letterhead or memo head that you have developed for your firm. This option applies to letters and memos only.

Document Defaults

- **Include cover page and table of contents (MS Word only):** This option allows you to include a cover page and table of contents in all relevant documents.
- **Include expanded footer in Trusts:** This option allows you to include the Title of the instrument, Firm Name and Page Number in the footer (not supported in WordPerfect).
- **Include expanded footer in Wills:** This option allows you to include the Title of the Will, Firm Name, Page Number and Signature Line for the Signer's Initials in the footer (not supported in WordPerfect).
- **Include expanded footers in POAs:** This option allows you to include the Title of the instrument, Firm Name and Page Number in the footer (not supported in WordPerfect).
- **Begin articles on separate pages (Wills and Agreements):** If you check the box, a page break will be inserted between articles.
- **Recite domicile:** In each will and trust agreement, you will be asked if you want to recite the Signer's domicile in the instrument's preamble (for example, "County of Nassau, State of New York" or "Dallas, Texas," etc.). For example, by answering this question "Yes," you have set the default for "Want to recite the Signer's domicile in the preamble?" to "Yes."
- **Prepare Executive Summary:** The option automatically prepare a companion "executive summary" for certain instruments including the Will, Revocable Trust, Joint Revocable Trust and Irrevocable Trust.
- **Draft Trust Agreements in first person:** The system provides the option to draft a trust agreement in the first or third person. Please note: First Person Style is an option not currently supported in Joint Irrevocable Trust and the Joint Single Beneficiary Trust. Those documents will be drafted in Third Person Style.
- **Use gender-neutral term "spouse" in Wills/Trusts:** The default in InterActive Legal Wills and Trusts is to refer to the signer's spouse using the gender-specific term (i.e., Husband or Wife). If you would prefer to use the gender-neutral term "spouse" instead, please select this option. Please note that this option does not apply to joint trusts.
- **Attach a Practitioner Action Checklist:** After the document has been drafted, it will be appropriate to consider taking or instructing the client on taking certain steps to ensure maximum and efficient use of the estate planning strategy undertaken by the document is achieved. By checking the box (effectively answering "Yes") the System will automatically print out some of the more important steps to consider once the document is signed.
- **Default County:** This answer reflects your general preference. If you provide a default answer, it will be used to pre-answer the question appearing in the document interview.
- **Default State:** Specify the state where you practice so that it can be used as a default answer, wherever the system asks for a state.
- **Default Corporate Fiduciary:** This answer reflects your general preference. If you provide a default answer, it will be used to pre-answer the question appearing in the document interview.

Execution Preferences

Check to include any of these items in your documents.

- **Notary seal:** This option produces a space with the word "SEAL" to provide an area for the notary to place his or her seal. In states where notaries now use stamps, this will likely not be relevant.
- **Witness(es) on Trust Agreements:** The system permits you to include optional witnesses on all trust agreements.

- **Third witness desired on Wills/Codicils:** Most states require two witnesses for Wills. Do you want your wills and codicils to require an extra (third) witness?

Preferred Terms

Specify the terms you wish to use in your assembled documents. Terms denoted with "*" allow for a custom answers, which means you may select from the available choices or provide a custom answer.

- **For Trust Creator(s)*:** Select the term you prefer when referring to the trust creator.
- **For Executor(s)*:** Select the term you prefer when referring to the fiduciary appointed to represent the probate estate under a Will.
- **For a Bypass Trust*:** Select the term that you wish to assign to a trust intended to shelter the estate tax exemption (federal or state) of the grantor or testator (sometimes referred to as a "bypass" or "credit shelter" trust).
- **Refer to Trustee(s) collectively in the:** Select whether you wish to use the singular term "Trustee" or the plural term "Trustees." This term will be used throughout your documents, regardless of the actual number of trustees designated.
- **For Discretionary Distributions:** You can choose to use the term "may" or "shall" in the distribution provisions of trusts.
- **For Trust Agreements*:** This option will set the default term used within the trust instrument to refer to the instrument (for example, "This Trust Agreement shall be irrevocable"). Please note that this term will not be used as the title of the trust instrument.
- **For making distributions to descendants:** Generally, individuals bequeath their property along family lines of their descendants so that each child who survives receives an equal portion of the property and the descendants of any predeceased child share the predeceased child's portion, equally. Historically, and today still commonly, such a division of property is known as a "per stirpital" disposition, and referred to as "per stirpes." However, some states and certain practitioners prefer to use the phrase "by right of representation" to describe a division along family lines. The option you select here will not affect the manner of disposition, but will affect the terminology used to refer to that disposition.
- **For Surviving Spouse (Joint Trusts)*:** This option allows you to select the name that you want to use for the Surviving Spouse in this document.
- **For a disabled person*:** Select the term you wish to use to refer to an individual who is not capable of managing his or her person or financial affairs (or the financial affairs of the trust, if referring to a trustee). This term is used in Wills, trusts, and certain ancillary documents, as a defined term.
- **Refer to Executor(s) collectively in:** Please select whether you wish to use the singular term "Executor" or the plural term "Executors." This term will be used throughout your documents, regardless of the actual number of trustees designated.
- **For Discretionary Distributions:** You can choose to use the term "may" or "shall" in the distribution provisions of trusts. For example: "The Trustee [may/shall] distribute to the Beneficiary as much of the net income or principal of the trust as the Trustee may at any time and from time to time determine, in such amounts or proportions as the Trustee may from time to time select for the recipient's health, education, maintenance and support in his or her accustomed manner of living." It may seem that provisions regarding discretionary distributions from a trust should use the term "may" so that the distributions are not mandatory, and certainly in some contexts, the term "shall" can

mean mandatory action. However, it depends upon the context. For example, saying, "I shall do it if I decide to do it" seems to mean that the action is discretionary because the object of the sentence ("I") gets to decide whether to do it or not. Similarly, a direction in a trust saying that "the Trustee shall distribute that portion, if any, of the trust's income that the Trustee alone determines, in the exercise of sole, absolute and uncontrolled discretion, which no one may challenge, to distribute" also suggests that the decision whether to distribute or not is entirely up to the Trustee. If the Trustee, in the exercise of that complete discretion determines not to distribute anything, then nothing need be distributed despite the word "shall." In fact, to change the sentence so its reads "the Trustee MAY distribute that portion..that the Trustee alone determines..to distribute" arguably is in some ways redundant. Nonetheless, coupling the word "may" with broad discretion might foreclose an argument of a required distribution from even being raised. Hence, some practitioners may prefer the use of the word "may" rather than "shall" even where the Trustee has discretion to decide whether any property is to be distributed at all. For this reason, we have given all users the choice. (Traditionally, InterActive Legal documents have used "shall.") If you prefer your document to use the term "shall," please make that selection. If you prefer the term "may," you can select that option, and the document will include the phrase "may, but shall not be required to." If you do not answer this question, the "may, but shall not be required to" text will appear in documents by default.

Legal Preferences

- **Rule Against Perpetuities choice:** Select the default rule against perpetuities "savings clause" provision you wish to use in your documents. This savings clause will provide that all trusts created under the document (and under an exercise of a power of appointment conferred by the document, unless commencing a new perpetuities period) will terminate at the end of the perpetuities period selected here.
- **Include RAP Waiver:** Check this box to waive the Rule Against Perpetuities in DC, Maryland, or Virginia trusts, as applicable.
- **Powers of appointment exercised:** Select how testamentary powers of appointment shall be exercisable in all your relevant documents.
- **Require writing by Grantor(s) for withdrawal:** Select this option if you wish to require the creator(s) or a revocable trust or joint revocable trust to provide written direction to the trustee to distribute assets of the trust to the trust creator(s).

Fees and documents Offered by Firm (Elder Law Planning ONLY)

Enter fees and other items that are used in various interviews in the **Elder Law Planning System**. A user can enter values generally used on this page and thus avoid having to repeat them in each interview that uses one or more of them. When these items appear in an interview, they reflect the values entered here, but the system will allow any or all of them to be changed in any particular document interview, if desired.

Firm Details

Enter details about the firm; such as the name, address, phone fax. This information will appear on the cover page and the expanded footer.

Attorneys and Practitioners

Enter drafting attorney information here and then select the drafting attorney name from the list when drafting.

Notaries

If the firm uses the same Notaries in various transactions, they can enter the names of notaries here and then select the from the list during document drafting.

Firm Witnesses

If the firm uses a regular set of Witnesses in various transactions, they can enter the witnesses here and select them later for use in documents assembled and witnessed at the firm.

5.4 Completing the Interview

You may review your answers by clicking on the “previous” and “next” buttons or navigate using the Interview Outline on the left side of the screen.

Once you are satisfied with the answers on all screens, click “Finish” and you will be returned to the SmartContent manager panel. If you are on the last screen of the interview, you can click next and it will also close the interview and return to the SmartContent manager panel.

HELP & SUPPORT: Contact content@interactivelegal.com for assistance with the Firm Preference interview. Refer to Chapter entitled "Get Support" on page 40 of this guide

Chapter 6. The Client Interview

Adding a client eliminates the need to enter repetitive data by creating a record of information that will be used for your new client. All answers supplied in the client interview are stored in an ILS answer file (*.anx). All data gathered during the client interview will be available for subsequent matters and documents created for this client.

6.1 Add New Client

Click the **Add New Client** button in the upper left corner of the **SmartContent** manager.

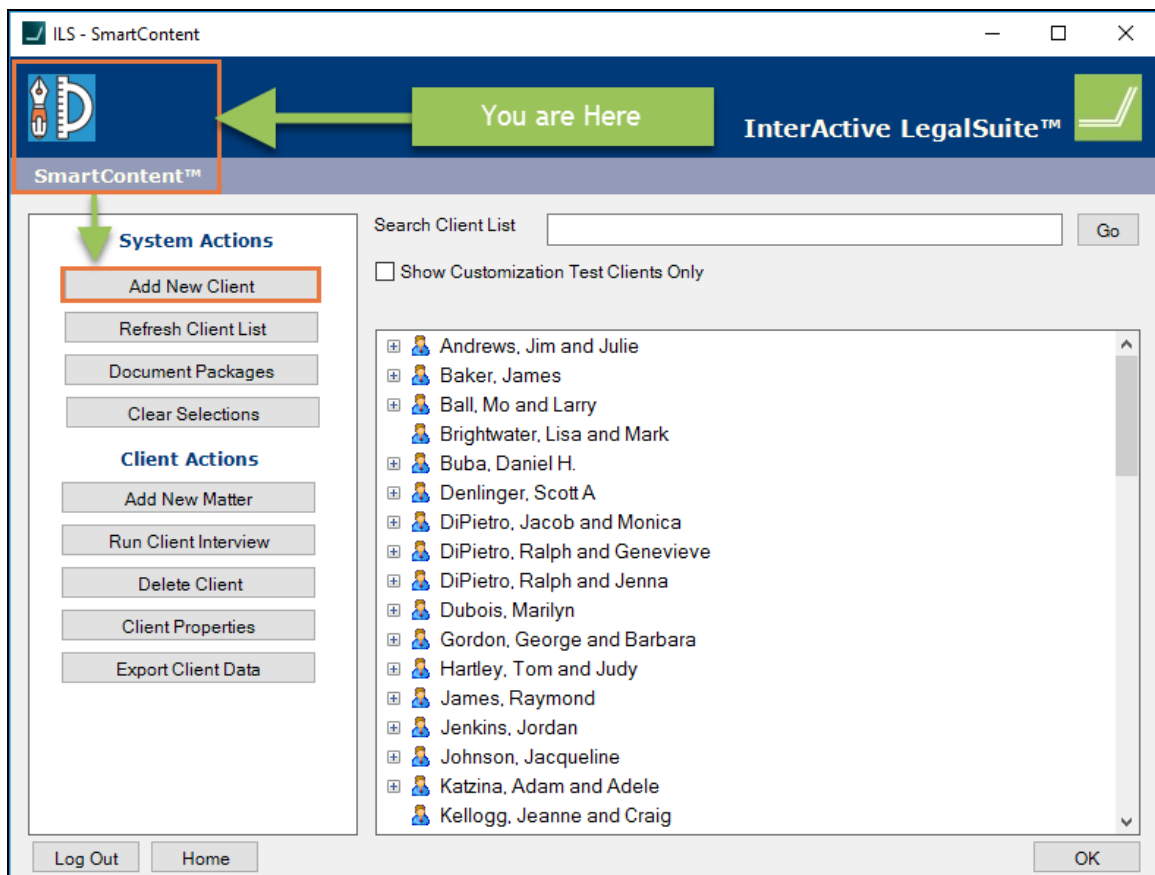


Figure 6.A – Add New Client from SmartContent Manager

6.2 Name Client for SmartContent

Enter the Client Name as you want it to appear in the SmartContent manager tree. Most firms use last name, first name, and middle initial (i.e., Smith, John A.). If there is a spouse or domestic partner, include their name, separating the names with "and." If spouses have different last names, follow the same rule (i.e., Smith, John A. and Doe, Jane S.).

Enter the Client Number, and any pertinent notes and click OK. The application is minimized and prepares to open an ILS Client interview.

6.3 Features common in all ILS Interviews

Refer to Chapter entitled "Features common in all ILS Interviews" on page 23 of this guide to learn more about interview navigation, required fields, drop down boxes, repetitive dialogs, repeat tables and help resources within the ILS Interview.

6.4 Client Interview Dialogs

Overview Dialog

The Overview dialog screen displays a description of the interview and the author's recommendations.

Client/Spouse/Partner Dialogs

When entering information for a married client or couple, you can start with the husband, the wife, or either domestic partner. Fill in as much information as you can at this time.

Tip: Have your client complete a Client Intake Questionnaire ahead of time. A sample Client Intake Questionnaire can be found in the **Resource Library** located on the **Home** screen. The questionnaire will save you time when entering information.

Children and Descendants Dialog

The client interview will ask for information on children and descendants regardless of the marital status of your client. When working with a married couple or partners, you will be asked to identify children separately for each individual so you can include or exclude them from the plan based on that relationship.

Please note: Use the **Add Another** button to add details on an additional child. See Chapter entitled "[Features Common in all ILS Interviews](#)" for more information on the **Add Another** button.

Parties List Dialog

The client interview allows you to use the Parties List. You may add the names of individuals that will be identified with this client such as successor fiduciaries, guardians, and friends. When you draft a document, you will be able to access the parties list from the client interview through a drop-down list.

Please note: Use the **Add Another** button to add an additional party. See Chapter entitled "[Features Common in all ILS Interviews](#)" for more information on the **Add Another** button.

6.5 Completing the Interview

You may review your answers by clicking on the "previous" and "next" buttons or navigate using the Interview Outline on the left side of the screen.

Once you are satisfied with the answers on all screens, click "Finish" and you will be returned to the SmartContent manager panel. If you are on the last screen of the interview, you can click next and it will also close the interview and return to the SmartContent manager panel.

Chapter 7. The Matter Interview

The system allows you to create a package of documents for a particular matter. One limitation is that you can create only one document of each type within a matter. All information entered in the Client Interview will be available for drafting documents in the matter.

7.1 Add Matter

To create a matter, select your client and then select the **Add Matter** action.

Please note: If your client is married or in a partnership, all documents created for the spouse or partner must be set up under a different matter for your client.

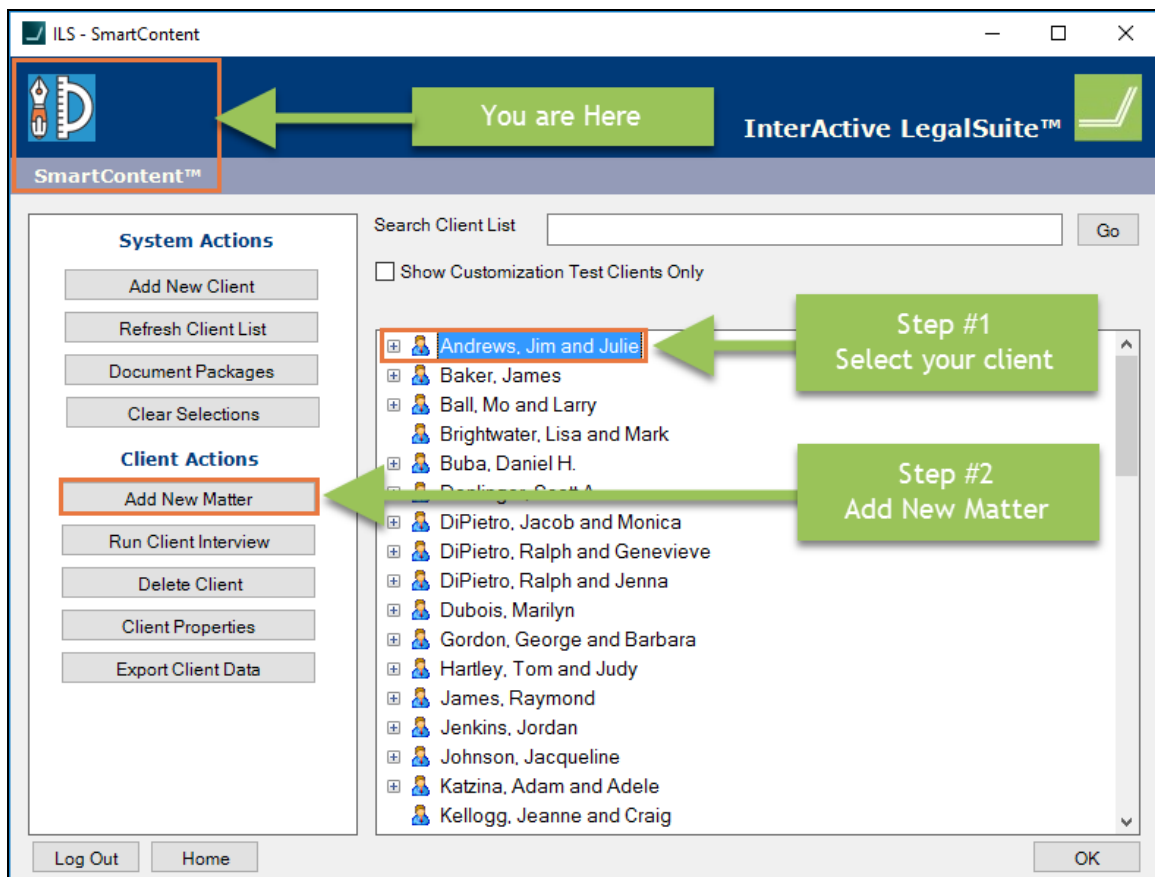


Figure 7.A – Add Matter from SmartContent Manager

7.2 Name Matter for SmartContent Manager

Enter the Matter Name and any optional Notes that may apply, and click OK to open the new Matter interview.

7.3 Features common in all ILS Interviews

Refer to Chapter entitled "Features common in all ILS Interviews" on page 25 of this guide to learn more about interview navigation, required fields, drop down boxes, repetitive dialogs, repeat tables and help resources within the ILS Interview.

7.4 Matter Interview Dialogs

Overview Dialog

The Overview dialog screen displays a description of the interview and the author's recommendations.

Introduction Dialog

On the Introduction dialog, you must indicate who the documents in this matter are being prepared for, and a default date for all documents in this matter.

If you are drafting documents using the Elder Law Planning System™ practice system, then you will need to indicate whether the documents are being prepared for medicaid eligibility and the person (attorney/paralegal) responsible for the matter.

Tip: You can easily create reciprocal will and trust documents by copying an entire Matter. An instructional document entitled "Reciprocal (Mirror Image) Document Drafting Guide" is located in the Resource Library from the Home screen.. For training on reciprocal documents, sign up for the live online webinar "ILS101GS Getting Started with InterActive Legal" at www.InterActiveLegal.webex.com/Training.

Matter Preferences Dialog

This dialog gives the drafting attorney the ability to change drafting preferences that are document-related for this client only. It does not change the default preferences of the firm.

7.5 Completing the Interview

You may review your answers by clicking on the "previous" and "next" buttons or navigate using the Interview Outline on the left side of the screen.

Once you are satisfied with the answers on all screens, click "Finish" and you will be returned to the ILS Framework desktop.

Chapter 8. Document Interviews

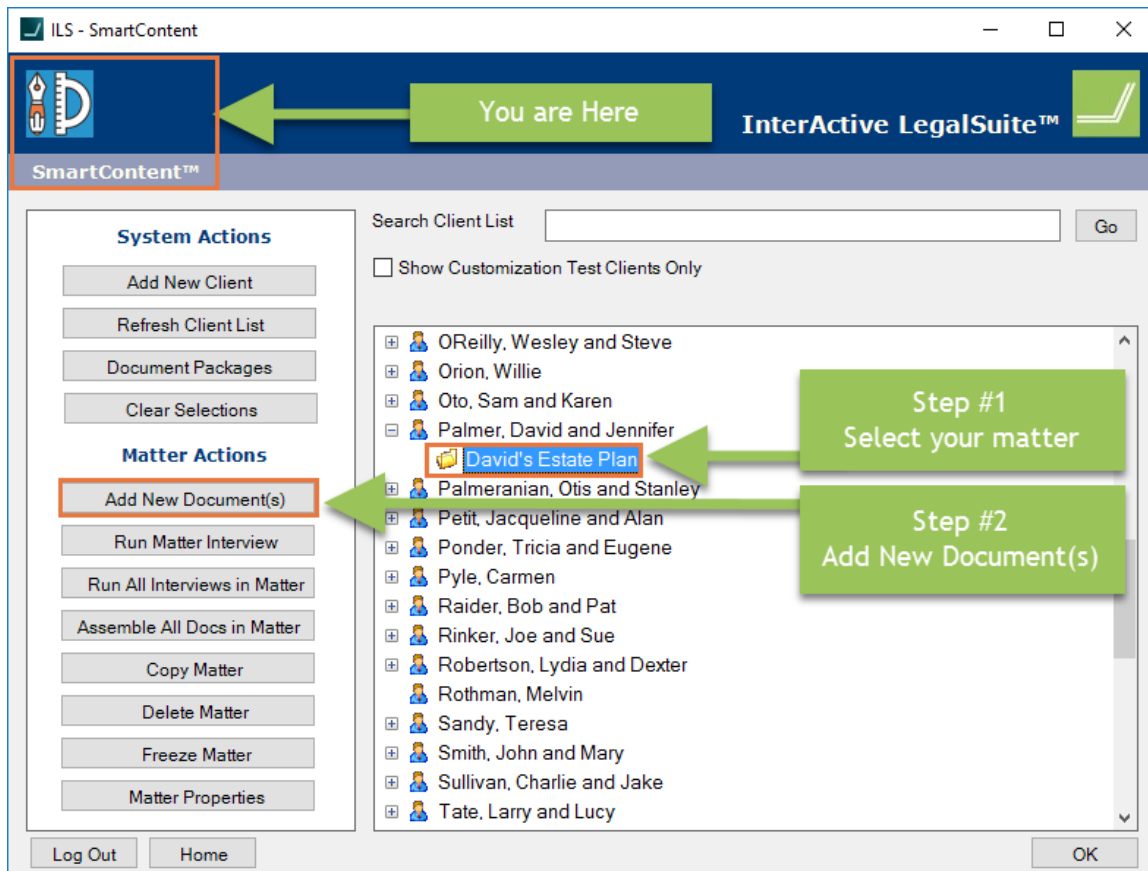


Figure 8.A – Add Document(s) from SmartContent Manager

8.1 Add Documents

At the **SmartContent** manager, select the Matter for your document(s), then select **Add Document(s)** from the **Matter Actions**. This opens the **Add Document Tree**.

Please note: Only one document per type can be added per matter. To create a second document of the same type for your client, you must create a separate matter.

8.2 The Add Document Tree

The **Add Document Tree** shows all the documents available in your practice system.

Please note: Document summaries by practice system are available in the **Resource Library** on the **Home** screen.

Navigating the Add Document Tree

Documents in the **Add Document Tree** are organized by category and subcategory. Click on the plus sign to open categories in the **Add Document Tree**. Click on the minus sign to hide documents or categories in the **Add Document Tree**. You will know you have reached the document level when you do not see plus signs to the left of the document name.

Document Profiles

A document profile is a document interview where questions have been pre-answered to save the drafting attorney time when drafting. It is a starting point for your document interview. Every InterActive LegalSuite practice system is shipped with a variety of document profiles, each designed for a specific type of plan.

You can select a profile authored by InterActive Legal or you can select "No-Preset answers" and build your own answer set from scratch.

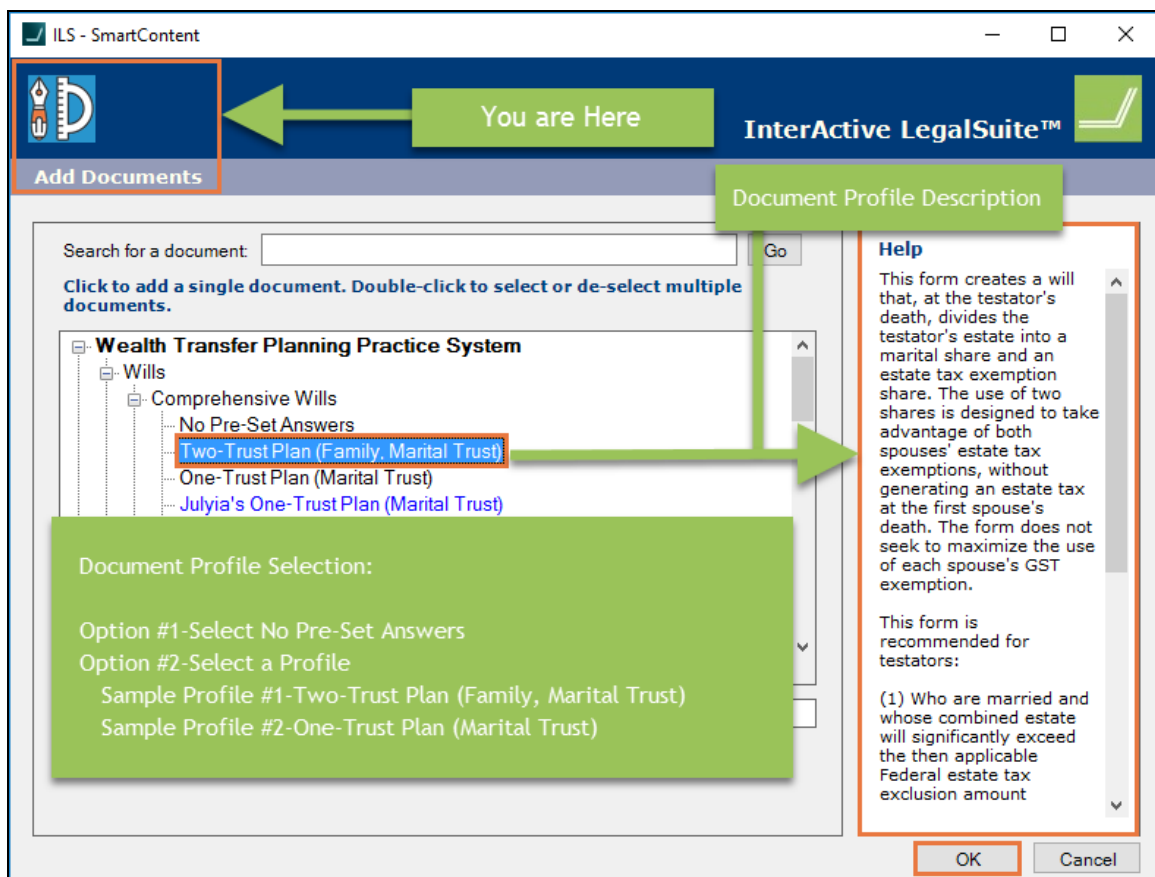


Figure 8.B – Add Document

Document Profile Descriptions: Click on a document profile in the **Add Document** tree to read the related document profile description to the right.

Profiles Authored by InterActive Legal

The Interactive Legal authors have created many profiles for attorneys to use as a starting point for their document interviews. The profiles authored by InterActive Legal are designed to provide guidance on how best to answer the

questions to achieve desired results, save you time and provide consistency in your practice.

Drafting Tip: Pick the document profile that is closest to the document you want to draft for your client. Every answer in an interview can be changed while you are in the document interview.

Custom Profiles Authored at Your Firm

Subscribers can create their own custom document profiles to use as a starting point at their firm. To learn how to create custom profiles, register for our free customization webinar entitled ILS103 Customization of Profiles and Styles sheets at <https://interactivelegal.com/Training-Support.php>. The ILS103 webinar covers the creation of custom answer profiles and modification of Word style sheets.

8.3 Selecting and De-Selecting Documents in the Add Document Screen

Drill down through the **Add Document tree** to locate desired document(s). You can also search for a particular document by typing a search term into the **Search** box and pressing **Go**. You can select a single document or multiple documents.

Single Document Selection

Single-click on a document in the **Add Document Tree** to select the document and then click **OK** to run the document interview.

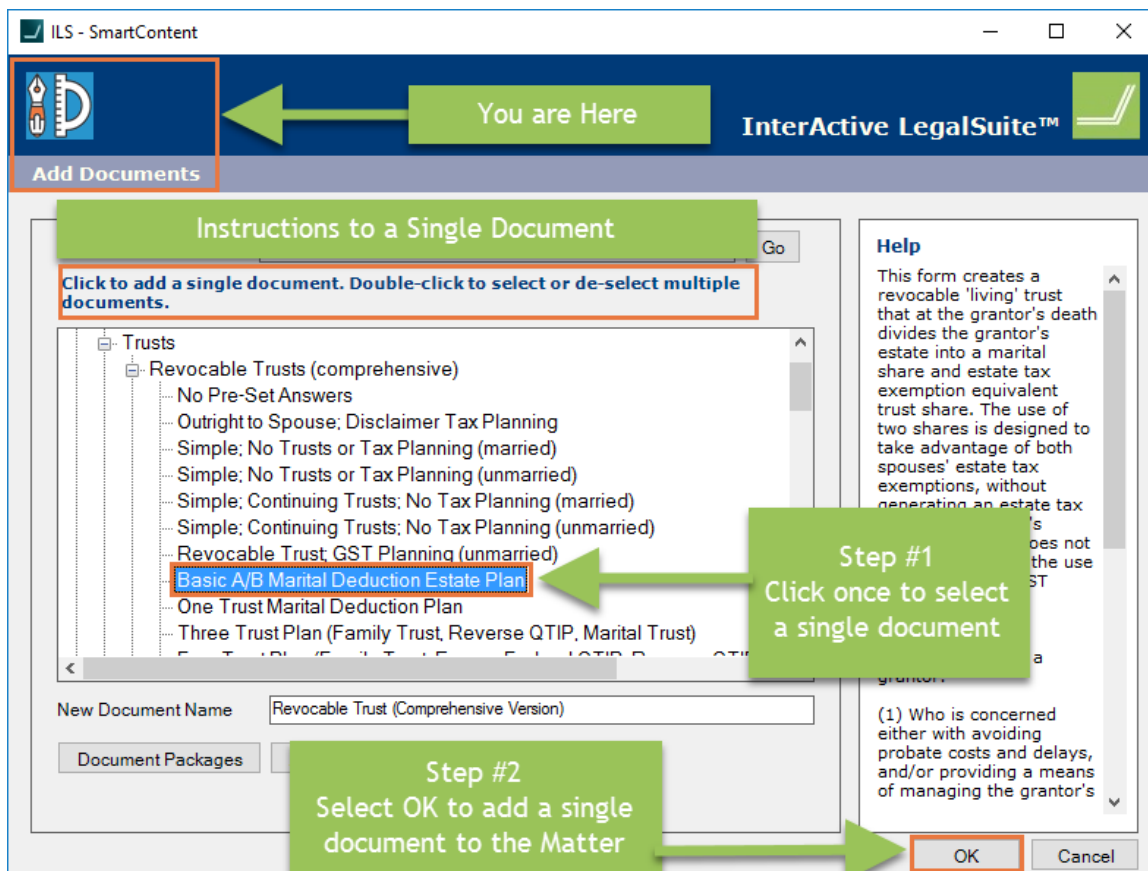


Figure 8.C – Instructions to Add a Single Document to the Matter

Multiple Document Selection (Batch Processing)

Double-click on multiple documents in the **Add Document Tree** to select more than one document. The selected documents will be highlighted to let you know they have been selected. The double-click feature toggles your selections on and off. When document selection is complete, click **Add Selected Docs to Matter** to add the selected documents to your client's matter.

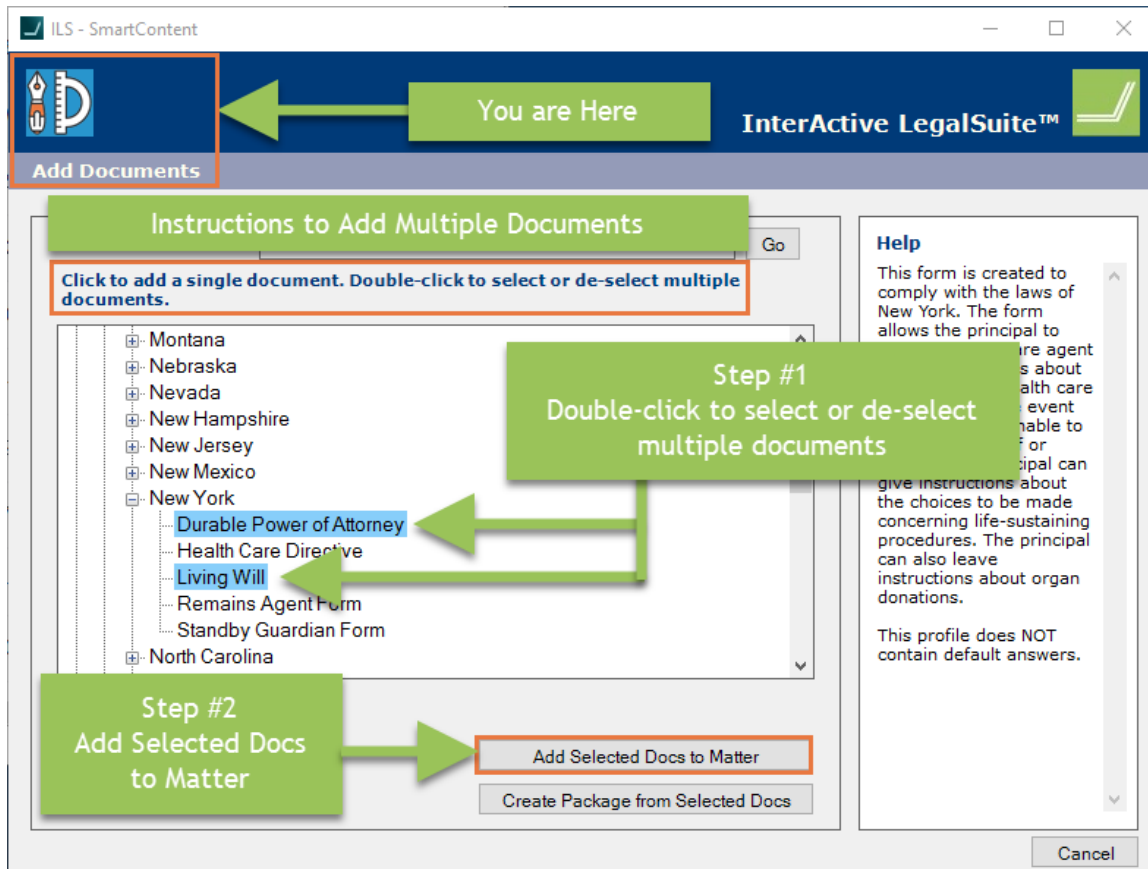


Figure 8.D – Instructions to Add Multiple Documents to the Matter at one time

Batch Processing Confirmation

The **Batch Processing Confirmation** screen illustrated in Figure 7.E displays the list of selected documents, their category, group and profile name.

If the list of selected documents is not correct, click **Cancel** and modify your selection.

If the list of selected documents is correct, choose whether to run the interviews for all of the selected documents immediately, or simply add the documents to the matter and run the document interviews later.

Press OK to begin batch document addition.

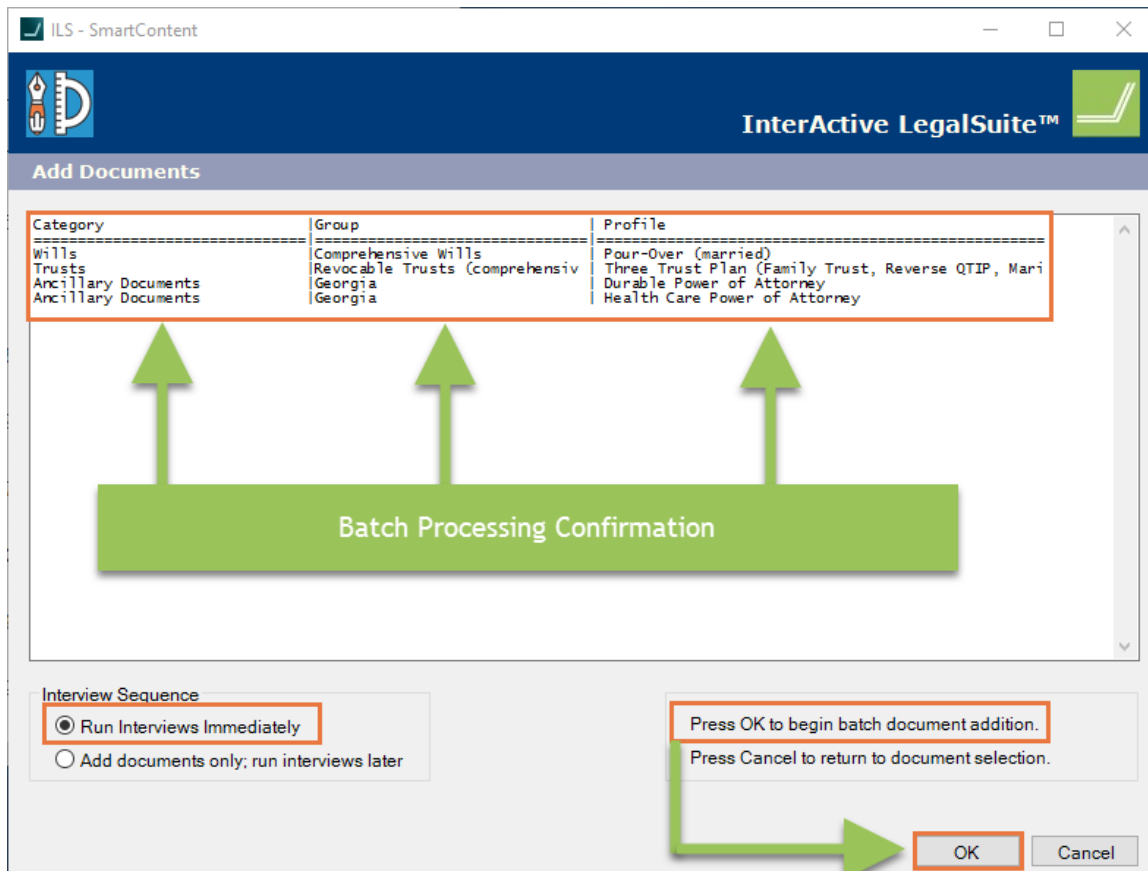


Figure 8.E – Batch Processing Confirmation Screen

8.4 Document Interview Dialogs

Overview Dialog

The Overview dialog screen displays a description of the interview and the author's recommendations.

Introduction Dialog

The Introduction dialog screen from the matter interview is displayed in the document interview for information purposes only. You must return to the Matter interview to edit the Introduction Dialog.

Drafting Preferences Dialog

This dialog gives the drafting attorney the ability to change drafting preferences that are document-related for this client only. It does not change the default preferences of the firm.

Remaining Dialogs

Complete all dialogs in the ILS document interview. You may review your answers by clicking on the "previous" and "next" buttons or navigate using the Interview Outline on the left side of the screen.

8.5 Features common in all ILS Interviews

Refer to Chapter entitled "Features common in all ILS Interviews" on page 31 of this guide to learn more about interview navigation, required fields, drop down boxes, repetitive dialogs, repeat tables and help resources within the ILS Interview.

8.6 Document Preview

The Document Preview Tab provides a way to view the text of your document before assembly. The text of the document cannot be edited in document preview. To use the document preview tab, answer all the questions in the ILS Interview, then click on the Document Preview. After reviewing the text, click the Interview Tab to return to the interview. You can continue to review your answers or finish the interview.

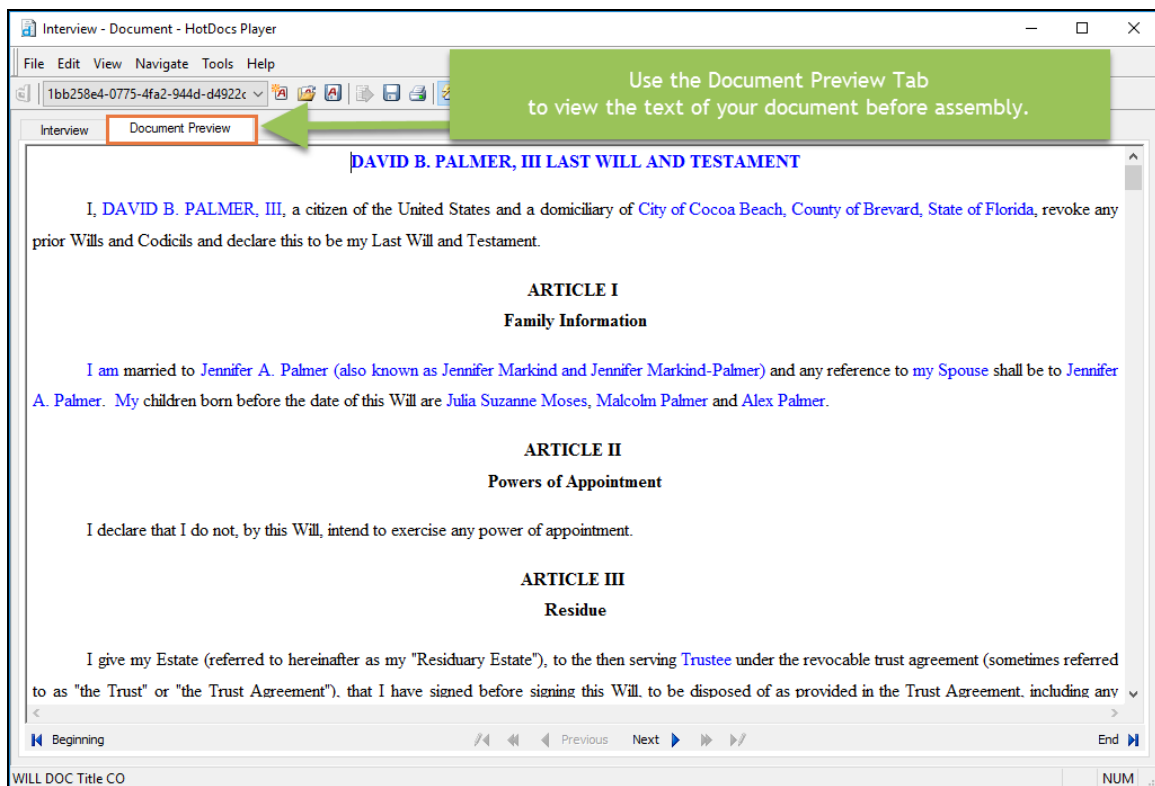


Figure 8.F – Document Preview Tab in the ILS Document Interview

8.7 Completing the Interview

Once you are satisfied with the answers on all screens, click "Finish" and you will be returned to the ILS Framework desktop. If you are on the last screen of the interview, you can click next and it will also close the interview and return to the ILS Framework desktop.

8.8 Assembling the Document

The assembly process creates a word processing document based on your answers and the InterActive Legal document templates. From the SmartContent Manager tree, select the document profile and click Assemble Document from the available actions.

The next screen entitled Important Notice is a disclaimer that you must read and accept. After reading the disclaimer, check "I acknowledge this notice" and click OK.

8.9 Re-assembling the Document

Once you have reviewed your document, you may find that certain answers need to be changed or added. You can change answers in your document interview and re-assemble the document.

1. Close the Word Processing document.
2. Run the Document Interview and make changes to your answers.
3. Assemble document again.

Important: If you re-assemble a document, it will be completely redrafted, overwriting the previous version saved inside the InterActive Legalsuite framework. If you wish to preserve multiple versions of the document, use your word processor's "Save As" function and save the document with a different name as described in the next section "Saving your Document."

8.10 Saving your Document

Most firms save their assembled word processing document outside the InterActive LegalSuite framework into their document management system or to a network drive to share the document with members of their firm who are not licensed ILS subscribers.

Save Document inside InterActive LegalSuite Framework

You can save your assembled document inside the InterActive LegalSuite framework. If you select this method, only licensed InterActive LegalSuite subscribers at your firm will be able to get to the document and make changes. To edit and save your document inside InterActive LegalSuite, simply make changes and close the document. When you select close, you will be prompted to save your changes. Indicate yes and your document will be saved inside the InterActive LegalSuite framework. When you are ready to edit or print your document, highlight the document in the SmartContent tree and select "Open Document" from the available Document Actions.

Save Document outside InterActive LegalSuite Framework

You can save your assembled word processing document outside the InterActive LegalSuite system into your Document Management System or to a network drive at your firm. Use your word processor "Save As" feature to save the document outside InterActive LegalSuite. If you save your assembled document outside Interactive LegalSuite, the copy inside InterActive LegalSuite will not be updated with your word processing edits. It will contain your original assembled document as authored by InterActive Legal.

Please note: Your assembled document is a typical word processing document. It can be edited and saved using your word processor.

Chapter 9. ILS Word Processing Document

Your assembled ILS documents are standard word processing documents; therefore, you can edit your documents using tools within your word processor.

9.1 ILS Tools Toolbar for Word

ILS distributes a proprietary toolbar in Word that provides several easy and convenient editing and formatting tools. You do not have to use the ILS Tools toolbar to edit your documents after they are assembled by our system. Some items on the toolbar are word processor features put on the toolbar for your convenience. Other features are proprietary tools that only work with your ILS document.

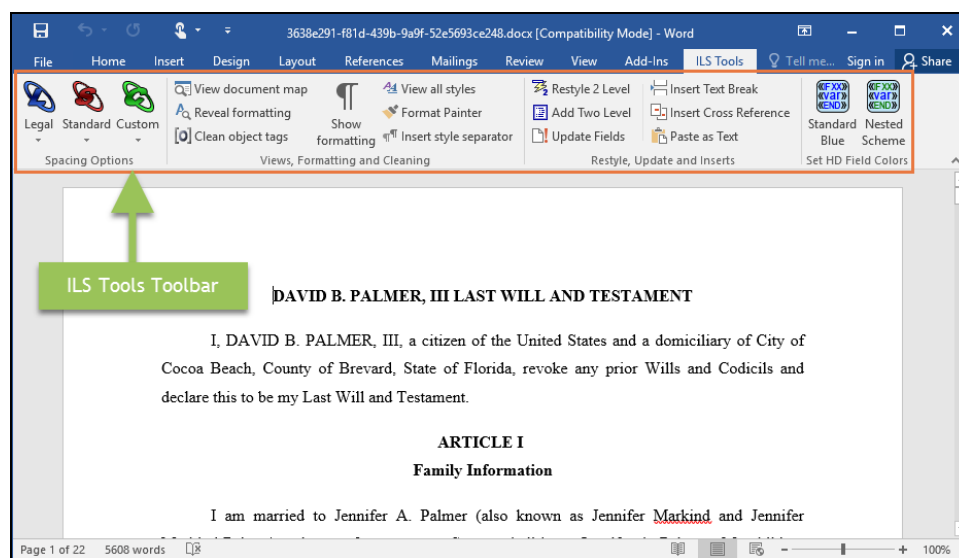


Figure 9.A – ILS Tools

9.2 Free Document Formatting and Editing Webinar

To learn about the advanced word processing features used in your ILS Word document, register for our free document formatting and editing webinar (ILS102 Document Formatting and Editing). This webinar teaches attorneys, paralegals, and word processing personnel about the advanced Word features used in InterActive Legalsuite documents. Subscribers learn how to add/edit text using the proper techniques to keep text aligned and auto-numbering formatted correctly. All features of the ILS toolbar are covered in this webinar.

9.3 WTP Styling Toolbar for WordPerfect

ILS distributes a proprietary toolbar in WordPerfect that provides several easy and convenient editing and formatting tools. WordPerfect toolbar training is available upon request. Please contact our Training Specialist at training@interactivelegal.com for more information on the WTP Styling Toolbar.

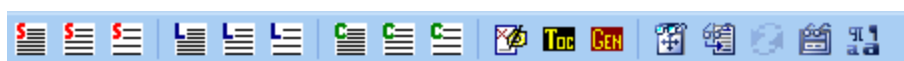


Figure 9.B – WTP Styling Toolbar for WordPerfect

Chapter 10. Document Packages

Professional subscribers have the option to create packages of commonly-used documents, making it easier and more efficient to add documents to future Matters.

For example, you can create a standard package that includes a Pour-over will, revocable trust with a common estate plan, power of attorney for your state, and medical directive for your state, so that when you begin drafting, you do not have to add each document individually. You can create multiple packages for different needs, such as having packages for estates with no tax planning and packages for more complex planning.

Document packages can be created for any InterActive LegalSuite practice system.

There are two ways to create and manage document packages within your ILS practice systems. Document packages can be created and managed from **SmartContent** or from the **Add Document Tree**.

10.1 How to Create a Document Package from SmartContent

Click the **Document Packages** button from the **System Actions** to create a package of commonly-used documents.

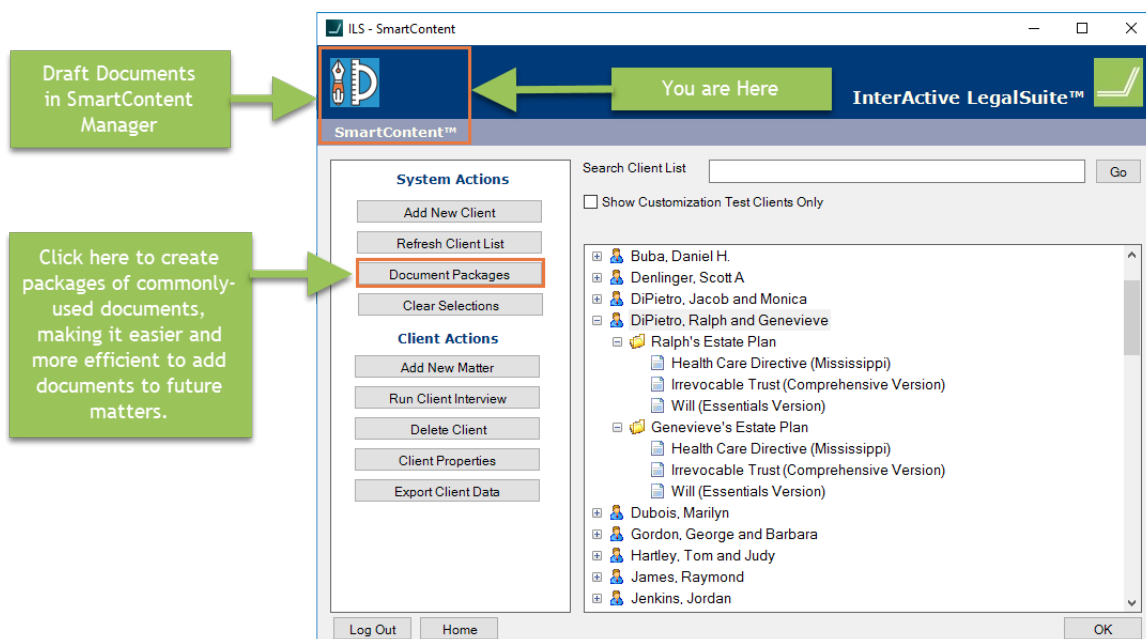


Figure 10.A – Create Document Package from within SmartContent

Navigating the Create Custom Packages of Documents for use with all Clients

Documents in the **Create Custom Packages of Documents for use with all Clients** screen are organized by category and subcategory as illustrated in Figure 9.B. Click on the plus sign to open categories. Click on the minus sign to hide documents or categories. You will know you have reached the document level when you do not see plus signs to the left of the document name.

Please note that on this screen you are NOT creating documents for any particular client. To create documents for a client, click **Cancel**, select the client and matter in which you need to draft, and select **Add New Document(s)**.

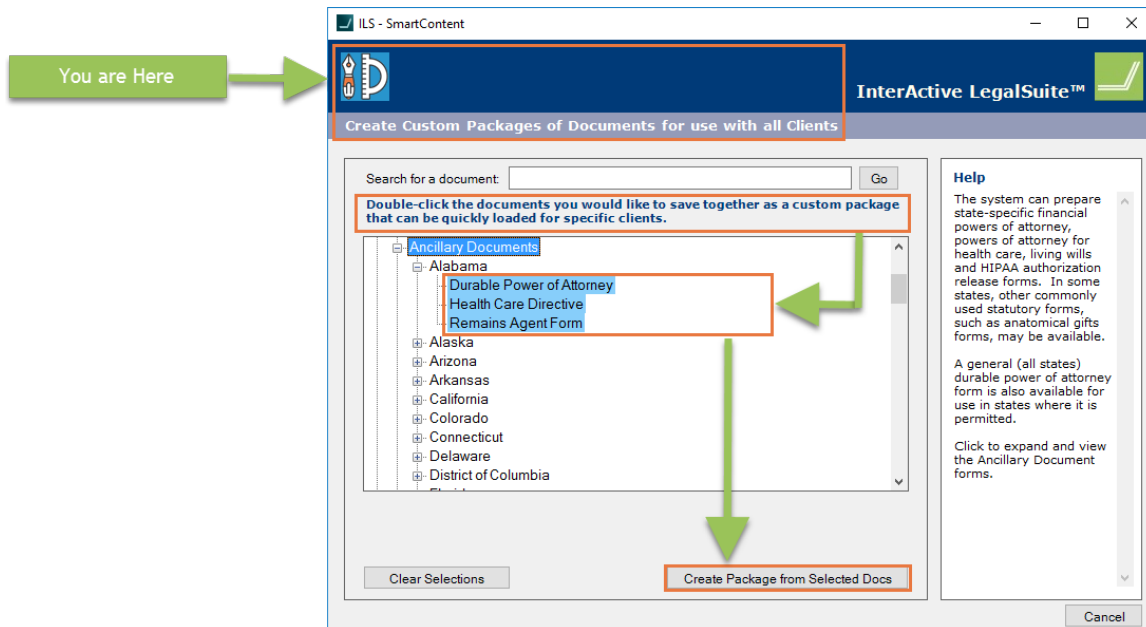


Figure 10.B – Create Custom Packages of Documents for use with all Clients

Selecting and De-Selecting Documents in the Create Custom Packages of Documents for use with all Clients

Drill down through the **Create Custom Packages of Documents for use with all Clients** screen and double-click on each document you would like to add to the new package. The selected documents will be highlighted to let you know they have been selected as part of the new package. The double-click feature toggles your selections on and off.

Create Package from Selected Docs

Once document selection is complete, click the **Create Package from Selected Docs** button at the bottom of the **Create Custom Packages of Documents for use with all Clients** screen as illustrated in Figure 9.B.

Add Document Package confirmation screen

The Add Document Package confirmation screen appears as illustrated in Figure 9.C. The confirmation screen displays a list of selected documents to be included in the package. If the documents listed are correct, then type a **New Package Name** and **New Package Description** and select **OK** to create the document package. After the document package has been created, you will be returned to the **Add Document Tree**.

If the documents listed on the confirmation screen are incorrect, then select **Cancel** to return to the **Create Custom Packages of Documents for use with all Clients** screen to modify your selection.

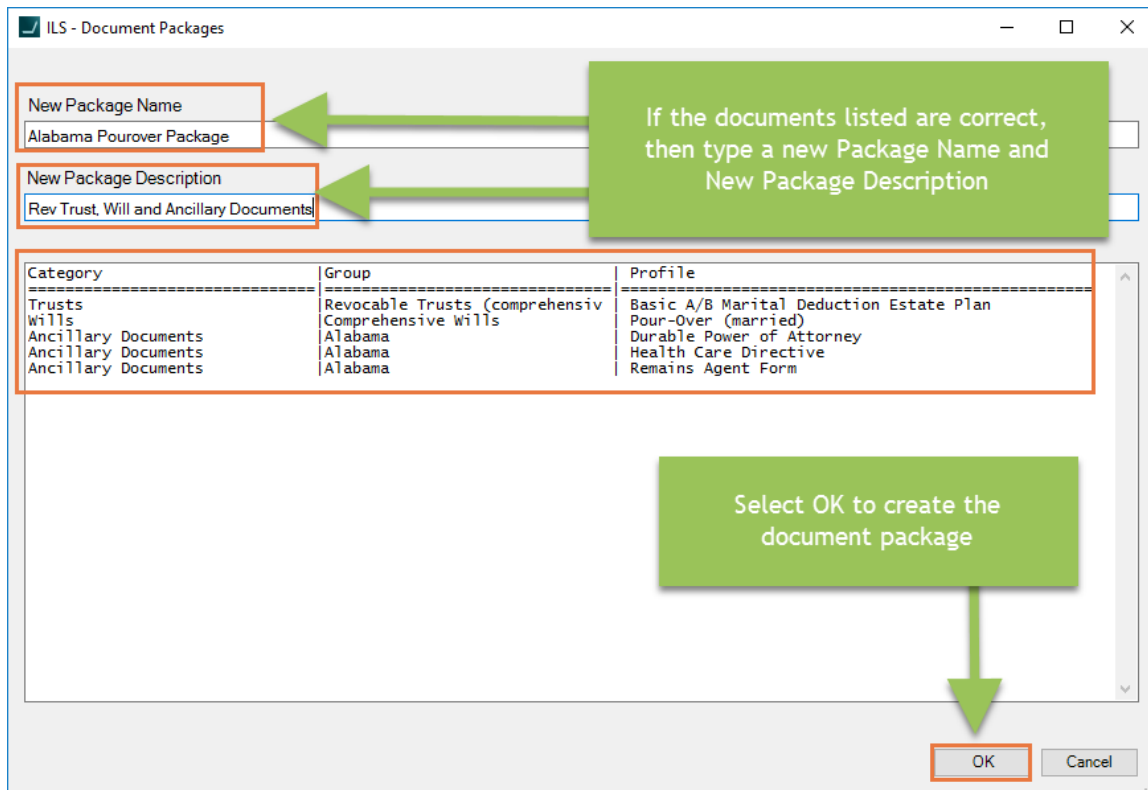


Figure 10.C – Create Document Package Confirmation Screen

10.2 How to Create a Document Package from Add Document Tree

Open the Add Document Tree

Select **Add Documents** from the **Matter Actions** or **Document Actions** in **SmartContent** to open the **Add Document Tree**.

Please note: It is recommended that you work with an empty matter when creating a document package from the Add Document Tree.

Navigating the Add Document Tree

Documents in the **Add Document Tree** are organized by category and subcategory. Click on the plus sign to open categories in the **Add Document Tree**. Click on the minus sign to hide documents or categories in the **Add Document Tree**. You will know you have reached the document level when you do not see plus signs to the left of the document name.

Selecting and De-Selecting Documents in the Add Document Tree

Drill down through the **Add Document Tree** and double-click on each document you would like to add to the new package. The selected documents will be highlighted as illustrated in Figure 9.D to let you know they have been selected as part of the new package. The double-click feature toggles your selections on and off.

Create Package from Selected Docs

Once document selection is complete, click the **Create Package from Selected Docs** button at the bottom of the **Add Document Tree**.

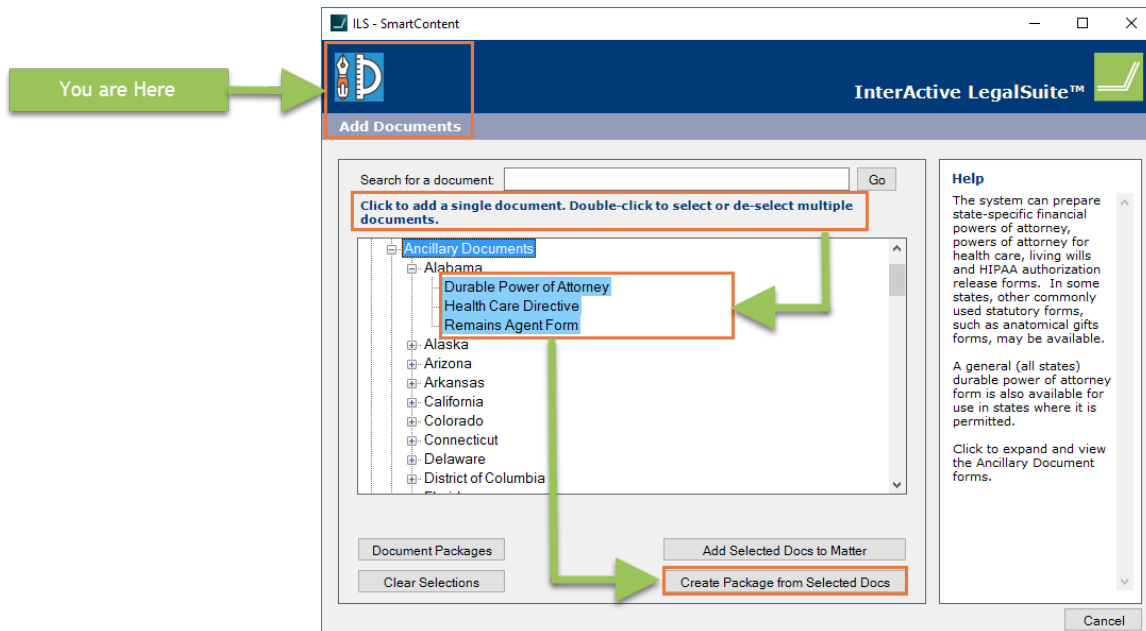


Figure 10.D – Create Document Package from Add Document Tree

Add Document Package confirmation screen

The Add Document Package confirmation screen appears as illustrated in Figure 9.C. The confirmation screen displays a list of selected documents to be included in the package. If the documents listed are correct, then type a **New Package Name** and **New Package Description** and select **OK** to create the document package. After the document package has been created, you will be returned to the **Add Document Tree**.

If the documents listed on the confirmation screen are incorrect, then select **Cancel** to return to the **Add Document Tree** to modify your document selection.

10.3 How to Add Documents to a Matter using a Document Package

Select **Add Documents** from the **Matter Actions** or **Document Actions** in **SmartContent** to open the **Add Document Tree**.

From the **Add Document Tree**, select the **Document Packages** button at the bottom of the screen to display a list of document packages created at your firm as illustrated in Figure 9.E.

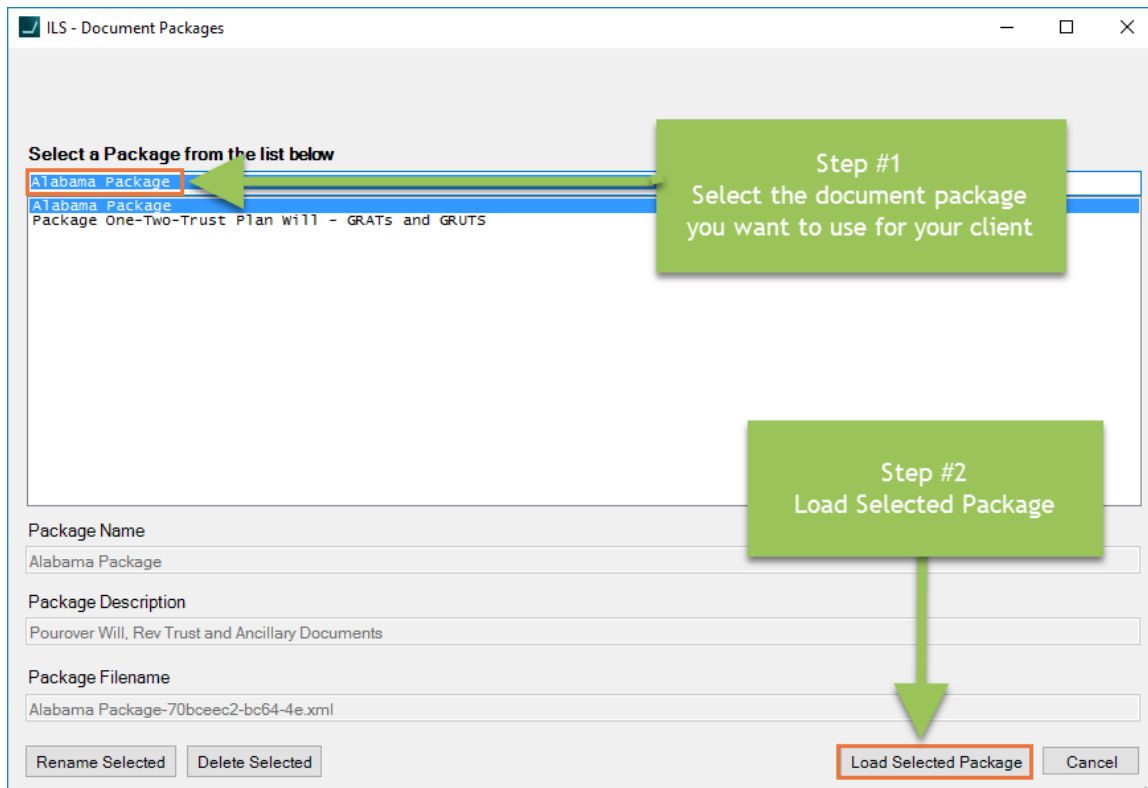


Figure 10.E – Document Packages screen

Click on the desired package to select it and then click the **Load Selected Package** button in the lower right corner. You will be returned to the **Add Document Tree** and all the documents in the selected package will be highlighted for you.

Please note: After you **Load Selected Package**, you can add or remove documents with a double-click directly in the **Add Document Tree**.

After you **Load Selected Package**, click **Add Selected Docs to Matter** to add the selected documents to your client's matter.

Batch Processing Confirmation

The **Batch Processing Confirmation** screen illustrated in Figure 7.F displays the list of selected documents, their category, group and profile name.

If the list of selected documents is not correct, click **Cancel** and modify your selection.

If the list of selected documents is correct, choose whether to run the interviews for all of the selected documents immediately, or simply add the documents to the matter and run the document interviews later.

Press OK to begin batch document addition.

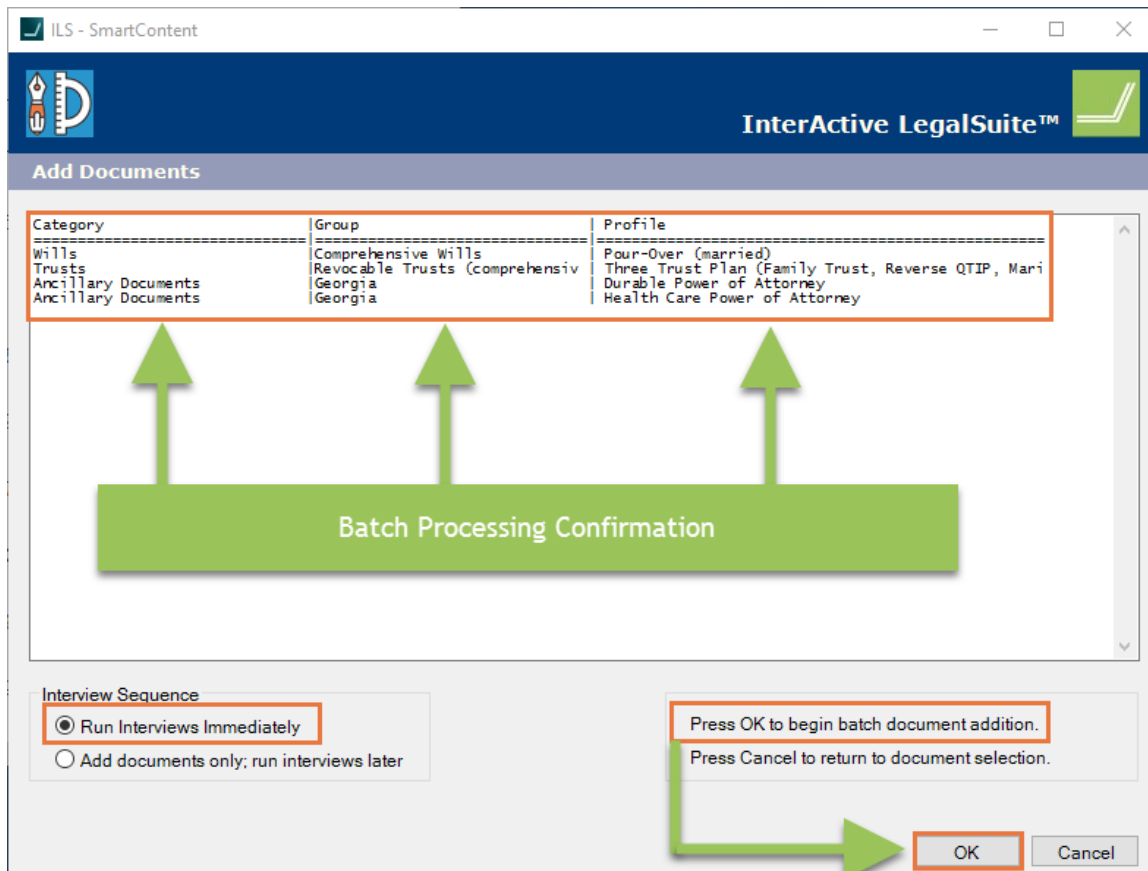


Figure 10.F – Batch Processing Confirmation Screen

10.4 Managing Document Packages

Once document packages have been created, you can delete or rename the packages from the Document Packages screen illustrated in Figure 9.E.

Rename Selected

You can rename a document package using the **Rename Selected** button at the bottom of the Document Packages screen. Click on the package you want to rename and then select **Rename Selected**. The original Package name is displayed. Type in the new name and select **OK** to rename the package.

Delete Selected

You can delete an unwanted document package using the **Delete Selected** button at the bottom of the Document Packages screen. Click on the package you want to delete and an "Are you sure" message box is display. Click **OK** to confirm the delete.

Chapter 11. Get Support



The **Get Support** button on the **Home** Screen is your resource for assistance inside the ILS Framework. Take a moment to review the **Support** screen, and notice the array of available Support options.

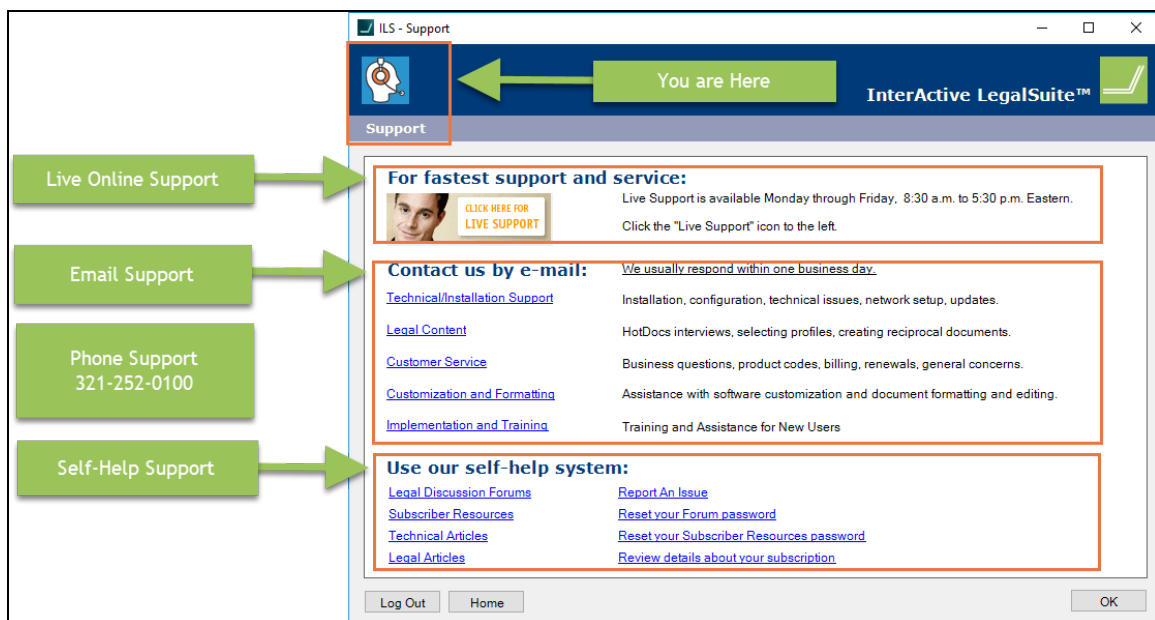


Figure 11.A – ILS Help Screen

InterActive Legal prides itself on providing the highest level of customer care, including Live Online Support, Email Support, Phone Support and Self-Help.

11.1 Live Online Support



The InterActive Legal Support Portal immediately connects you to a Support Representative for assistance. Once connected, the Representative is able to chat with you to determine the nature of your issue, and may ask to view and/or control your screen, in order to provide additional assistance. Support Representatives are available Monday through Friday from 8:30AM to 5:30PM ET, except holidays. Follow the directions below to initiate a Live Online Support Session

Step 1 Click here to navigate to the InterActive Legal Live Online Support Portal.

Step 2 In the Your Issue section, choose the option that best fits your need for support.

- Cloud Setup — Configuration and installation of ILS practice systems in the ILS Cloud environment
- Content, Interviews, and Legal Forms — Navigating document interviews, questions regarding document or interview content, instructions on entering client information and creating documents, selecting interview profiles, and creating reciprocal documents
- Customer Service — Subscription renewals, billing, business questions, licensing, product codes, general concerns.
- Customization — Customizing templates and profiles
- Document Editing and Formatting — Formatting and editing documents; using InterActive Legal proprietary styles and tools for editing and formatting
- Implementation and Training — Setting up and configuring the software program after installation
- Logins, Forums, and Website — Assistance with login to Discussion Forums, Website, or Software; Other Forum or Website issues
- Technical, Installation, Updates — Software installation, configuration, technical issues, network setup, update assistance.

Step 3 Enter your contact information in the Your Name and Company Name fields, and a brief description of your support request in the Describe Your Issue field.

Step 4 Click the Submit button.

11.2 Contact us by email



InterActive Legal subscribers can submit questions to the InterActive Legal Support Team using the group email addresses. Subscribers are encouraged to submit email comments, questions, and requests to these addresses, so that the first available representative from the selected group may respond. Emails submitted outside of standard InterActive Legal business hours (8:30AM to 5:30PM ET, M-F, except holidays) generally will receive a response as soon as possible during business hours on the following business day. Urgent requests submitted by email may receive a faster response, if a representative from the appropriate support team is available.

- **Technical Support** support@interactivelegal.com — Assistance with technical issues, software installation and updates, network setup, cloud setup, Legal Discussion Forums, Website
- **Legal Content** content@interactivelegal.com — Questions regarding document and interview content, navigating interviews, instructions on entering client information and creating documents, selecting interview profiles, creating reciprocal documents, customization and document formatting and editing
- **Customer Service** customerservice@interactivelegal.com — Subscription renewals, billing, business questions, licensing, product codes, general concerns
- **Customization and Formatting** content@interactivelegal.com — Assistance with software customization and document formatting and editing

11.3 Phone Support



InterActive Legal subscribers are encouraged to call us directly for assistance. Our main number is 321-252-0100. Support Representatives are available to assist subscribers Monday through Friday from 8:30AM to 5:30PM ET, except holidays.

Legal Content 321-252-0100

Questions regarding document or interview content, navigating document interviews, instructions on entering client information and creating documents, selecting interview profiles, creating reciprocal documents, customization and document formatting and editing.

Customer Service 321-312-4966

Subscription renewals, billing, business questions, licensing, product codes, general concerns.

Implementation and Training Services 321-408-2229

Implementation services include setting up and configuring the software program after installation, software training options and registration.

Technical Support 321-252-0094

Assistance with technical issues, software installation and updates, network setup, cloud setup, Legal Discussion Forums, Website.

11.4 Self Help System

ILS provides several Self-Help tools. Use your ILS online login credentials to access these Help features. If you do not know your login credentials you can send an email to support@interactivelegal.com or connect to a Live Online Support session as described above.