TXdocs

USER MANUAL

Schoolcraft Legal Systems

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Getting Started

1 Getting Started

You are probably eager to start assembling documents. But, first, take a few minutes to set up the TXDocs program and add basic information to personalize your documents before assembly. This will save you lots of time and effort in the long run.

Setup

Start by telling the program a few things about you, your firm, and how you want to work. On the main menu click Setup and complete the following:

- Program - Specify word processor and where you want your completed documents stored.
- Staff - Add staff information for assembly and office management purposes.
- Account 35 - Make sure we have your firm's name and address correct.
- Updates - By default, TXDocs checks for updates every time you start the program. You can modify that here.

TXDocs Main Window is the first window you see when you start TXDocs and gives you single-click access to:

- Assemble Documents
- Clients & Cases
- Client Documents
- Client Web Services

How to.....

2 How to.....

2.1 How to Assemble Documents

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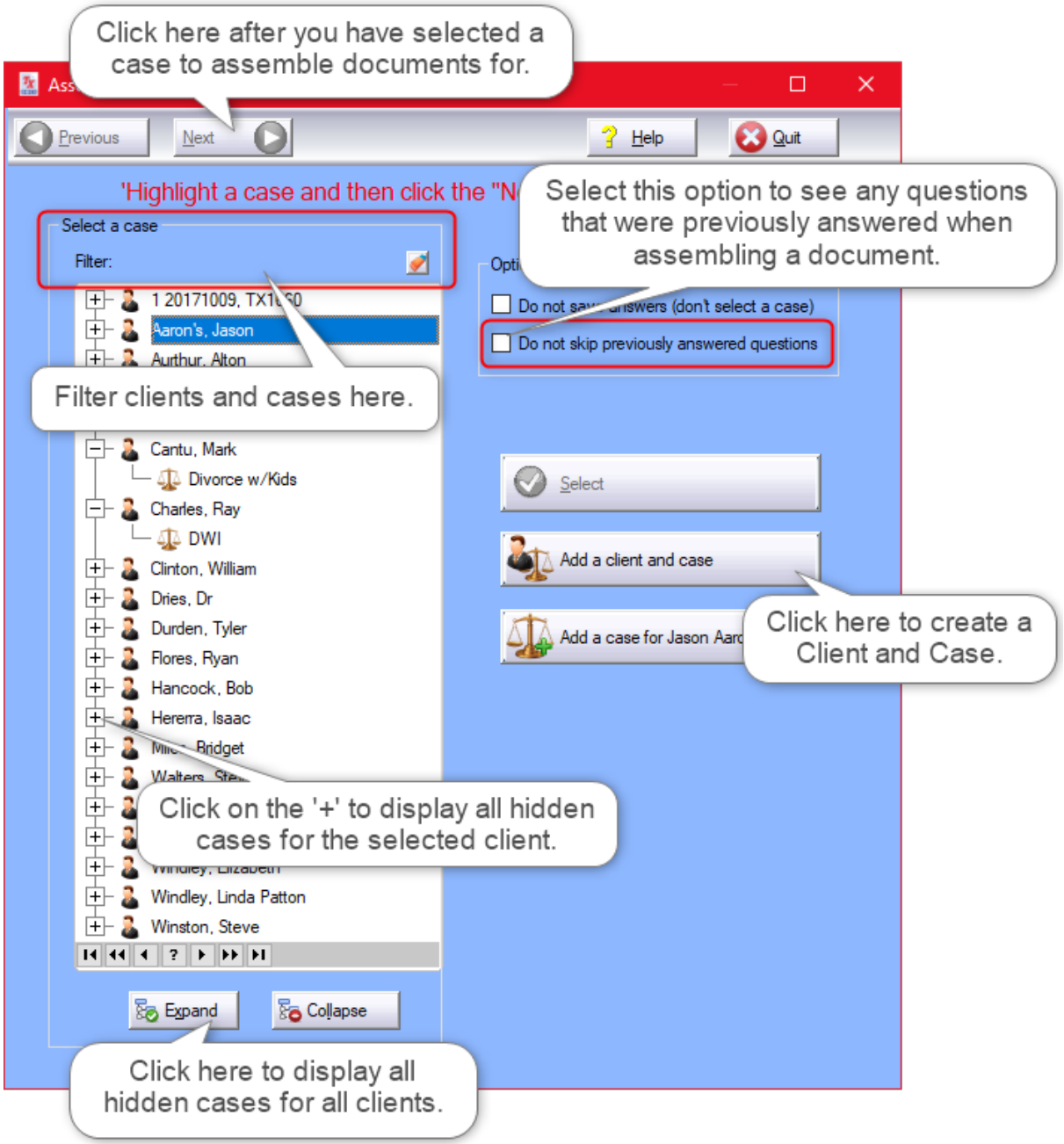
One of the biggest time savers TXdocs provides is the ability to save information you enter while assembling documents so that you don't have to retype the same information the next time you assemble documents for a case. Retyping the same names and addresses of the Petitioner and Respondent every time you assemble documents for a case is tedious and time-consuming. If you will select a case when you start to assemble documents, then your answers will be saved and reused every time you assemble more documents for that case. You will quickly realize the valuable time you save.

There are two ways to access the Assembly Setup - Select a Case window: From the main menu, click the Assemble Documents button or select File/Assemble Document.

1. The Assembly Setup - Select a Case window is displayed. This is where you can select a case and begin the assembly process. TXdocs will automatically save your answers unless you specify otherwise by marking the "Do Not Save Answers" checkbox.



2. Select the case you want to use and then click Next. You must select a case because entered answers can only be saved to a case (as opposed to a particular document).

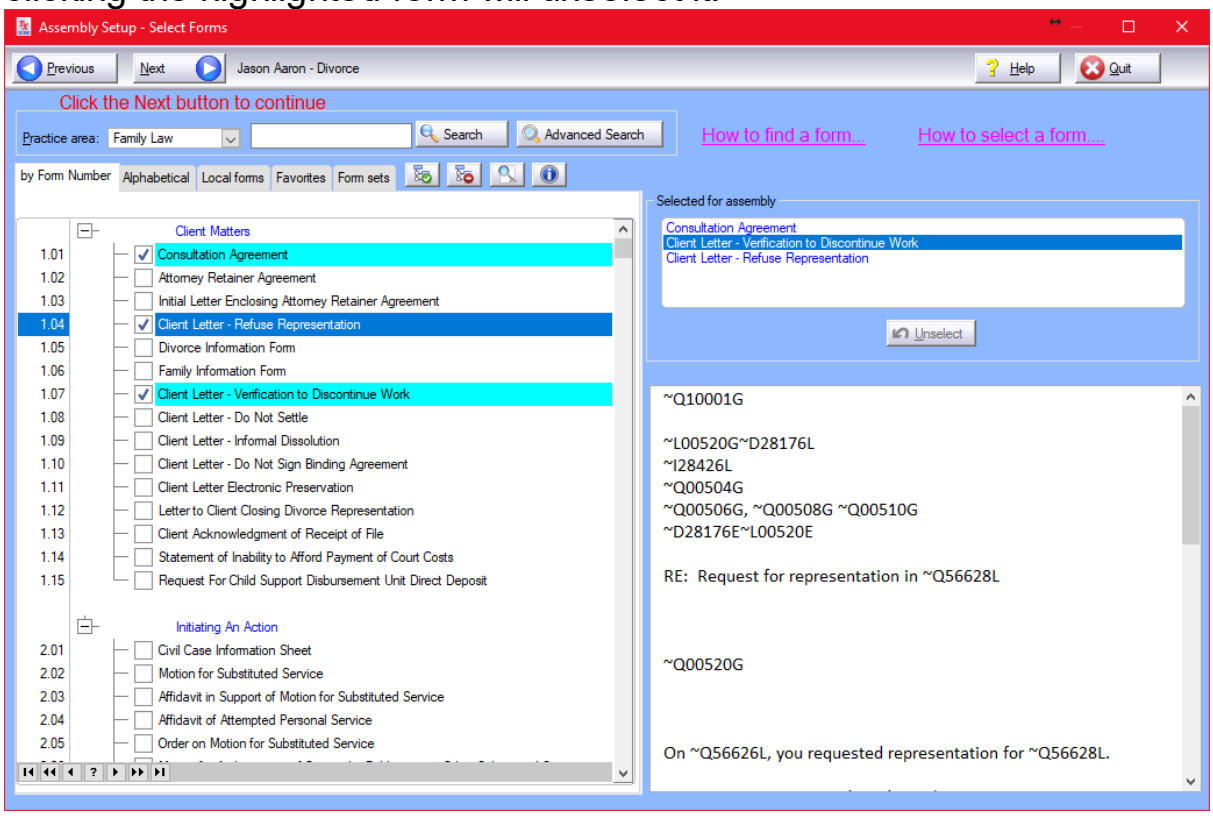
3. To edit or delete a client or case, highlight the client and/or case and right click to bring up the Edit and Delete options. (You can also add a client/case this way.) The Edit option brings up the client/case description form.

4. Select the case for which you want to assemble and then click Next to launch the Assembly Setup - Select Forms window. Here you will select the forms you wish to assemble.

5. Above the list of forms, there is a Practice Area pull-down menu. Select a practice area and TXdocs displays the appropriate forms. You can display the forms by alphabetical order or form number using the Display pull-down menu below the Practice Area menu. **Tip:** You can type in a letter in alphabetical mode or number in form number mode and the highlighter will jump locate the first template it matches.

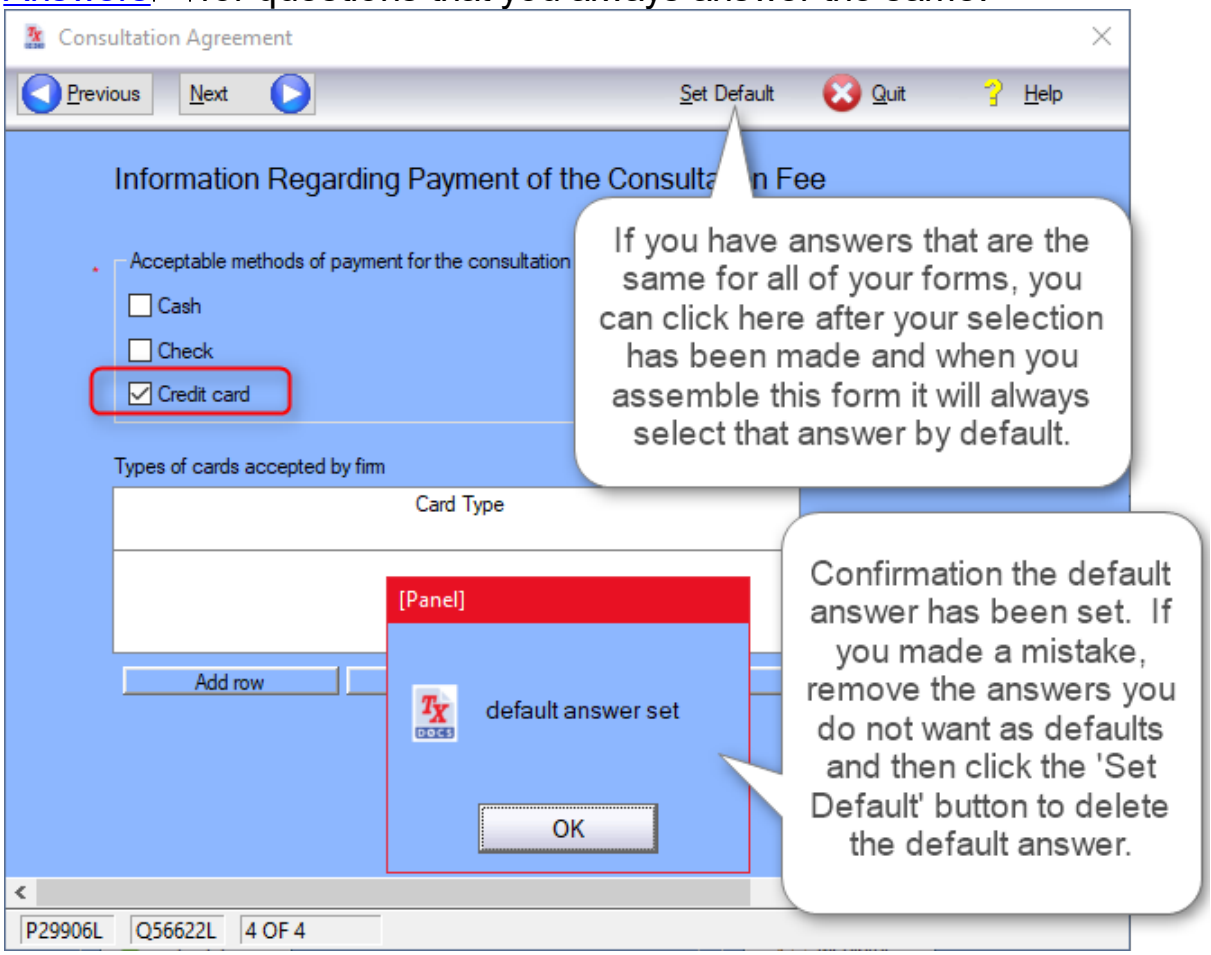
The selected forms will appear in the Selected field below the forms list.
Tip: For quick reassembly of one form, double click the form title. TXdocs will select it, reassemble it and open it.

6. To Unselect a form and remove it from the form set, highlight the form title in the Selected field and click the Unselect button. **Tip:** Double clicking the highlighted form will unselect it.



7. Once you have compiled your list of forms for assembly, click Next. TXdocs assembles the forms and launches the question and answer portion of the assembly.

8. Answer all of the questions. In this mode, you can Set or Edit Default Answers 27 for questions that you always answer the same.



9. After all questions have been answered, you will see a list of the Completed Documents. From this window you can open documents to edit and print.

How to Reassemble

Once a document is assembled, there is typically no need for reassembly. In the event you need to reassemble a document, you must go to Client Documents.

1. Click the Client Documents button in the main menu to display a list of client/cases.

2. Highlight the client/case on the left to display the associated documents on the right.

3. Highlight the document and click the Reassemble button, or right click a document to bring up the Reassemble option. Select Reassemble.

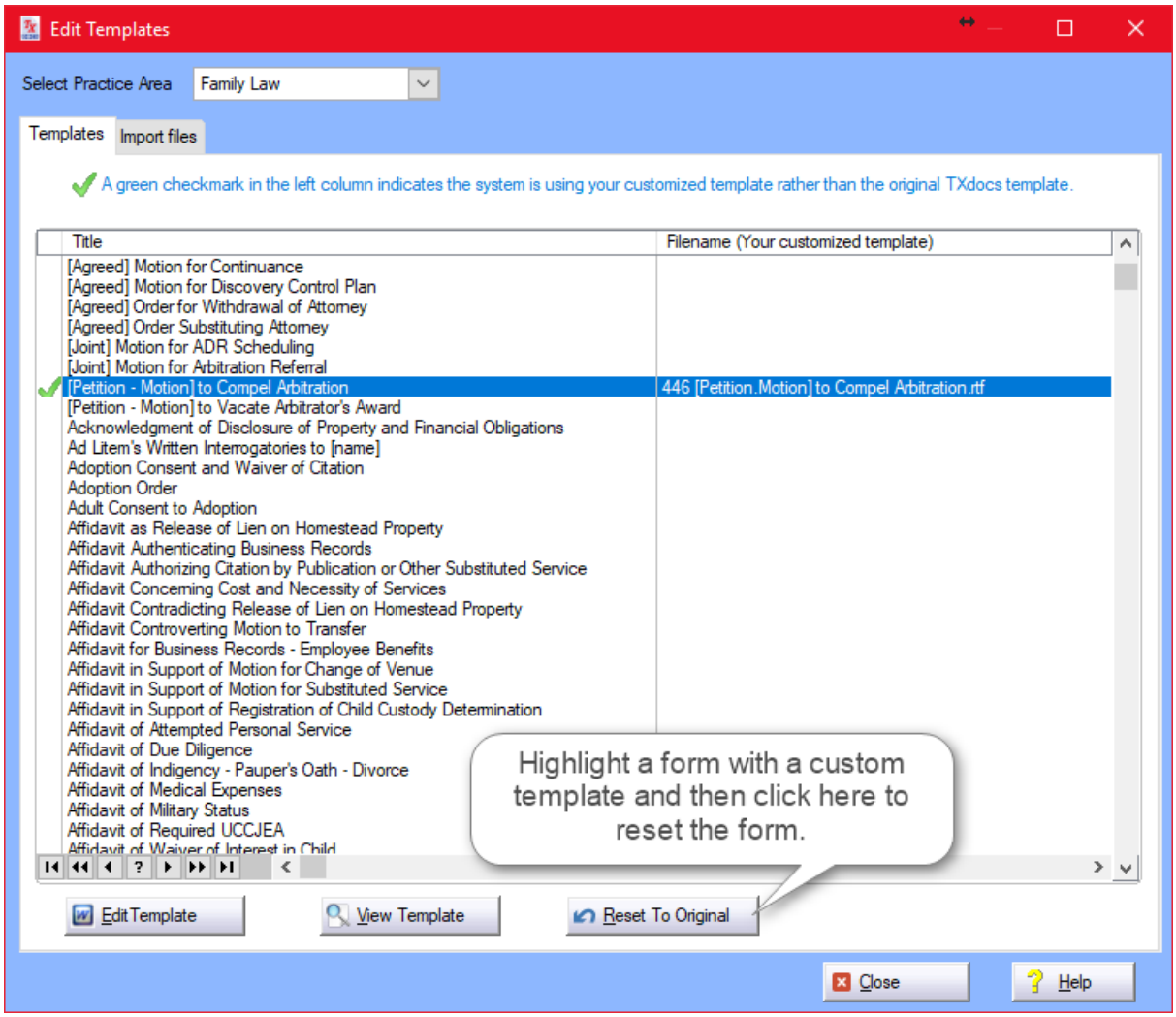
2.2 How to Edit Templates

CAUTION: TXdocs is not able to update any templates you customize. You will have to remember to go in and update any of your customized templates when there are legislative or other changes.

When you customize a template, our original template will be opened in your word processor. You make your changes and then save the file using the same filename. From then on, anytime that form is assembled, your customized template will be used instead of the original TXdocs template.

To edit a TXdocs template, click Edit/Templates on the main menu.

For information on how to edit TXdocs templates click here.

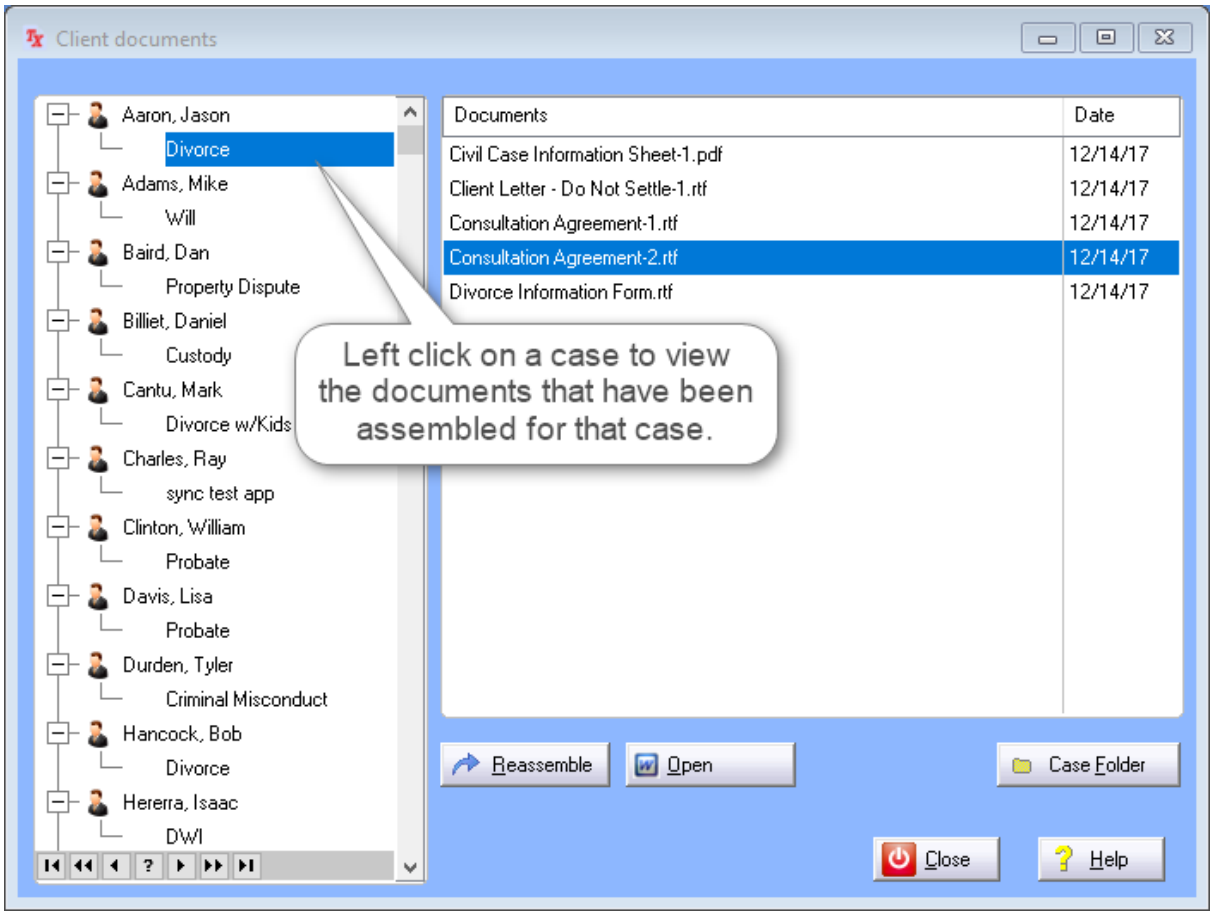


2.3 How to Find Assembled Documents

If you selected a case when you began to assemble a document, TXdocs will remember where it stored the completed document.

1. Click on the Client Documents button on the main menu. The Client Documents window lets you view the documents associated with a client or case.

2. Highlight a case on the left side and you will see documents assembled for that case displayed on the right side.



In this window, you can also open and reassemble completed documents as well as edit their properties. Right clicking a document in the Documents list brings up the Open, Reassemble and (edit) Properties options.

Tip: *Choosing to reassemble a document here is a shortcut. You can jump straight into the assembly process rather than having to select a case, select the form, etc.*

2.4 How to Edit Templates in Anywhere

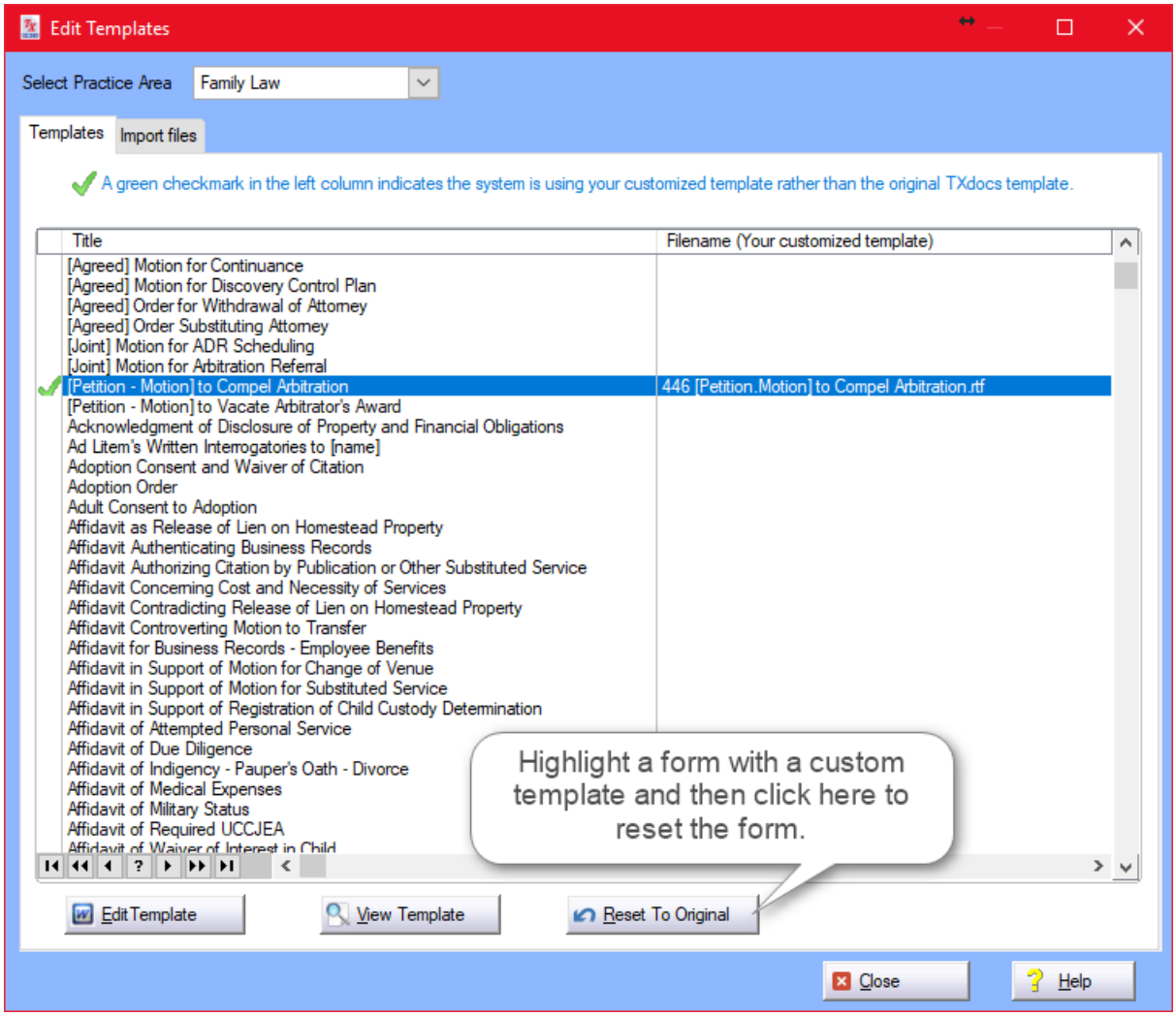
CAUTION: TXdocs is not able to update any templates you customize. You will have to remember to go in and update any of your customized templates when there are legislative or other changes.

When you customize a template, our original template will be downloaded and then opened in your word processor. You make your changes and then save the file using the same filename and then have

to upload it to the Custom folder on the root of the clientdocs folder in your Anywhere account. From then on, anytime that form is assembled, your customized template will be used instead of the original TXdocs template.

To edit a TXdocs template, click Edit/Templates on the main menu.

For information on how to edit TXdocs templates click here. (Word Perfect cannot be used to edit templates)



2.5 How to Format Assembled Documents

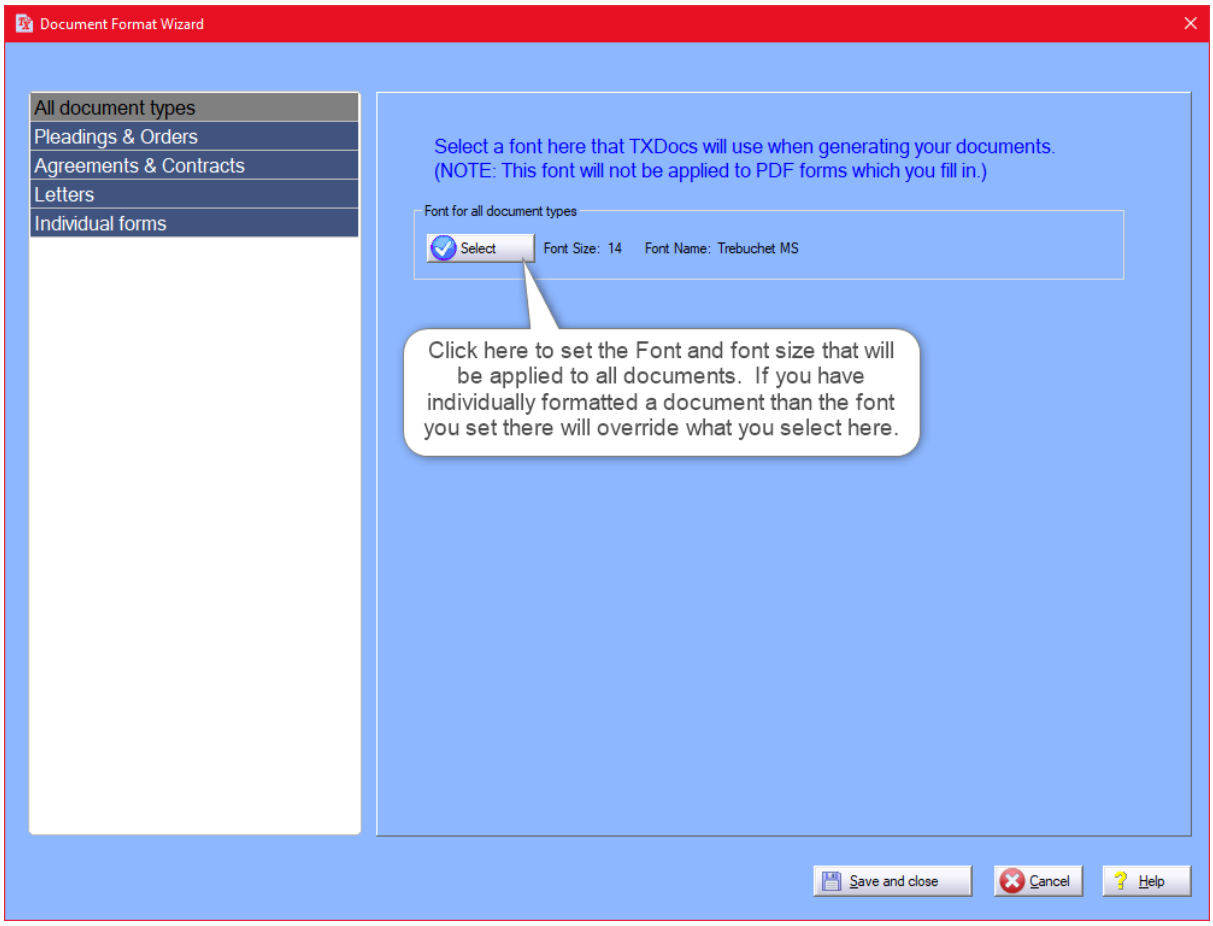
You can tell TXdocs how you want completed documents to be formatted. To format documents, select Setup/Format assembled

documents in the main menu. Then select the tab that corresponds with the formatting changes you wish to make.

All document types 15
Pleadings & Orders 16
Agreements & Contracts 17
Letters 18
Individual forms 15

All document types

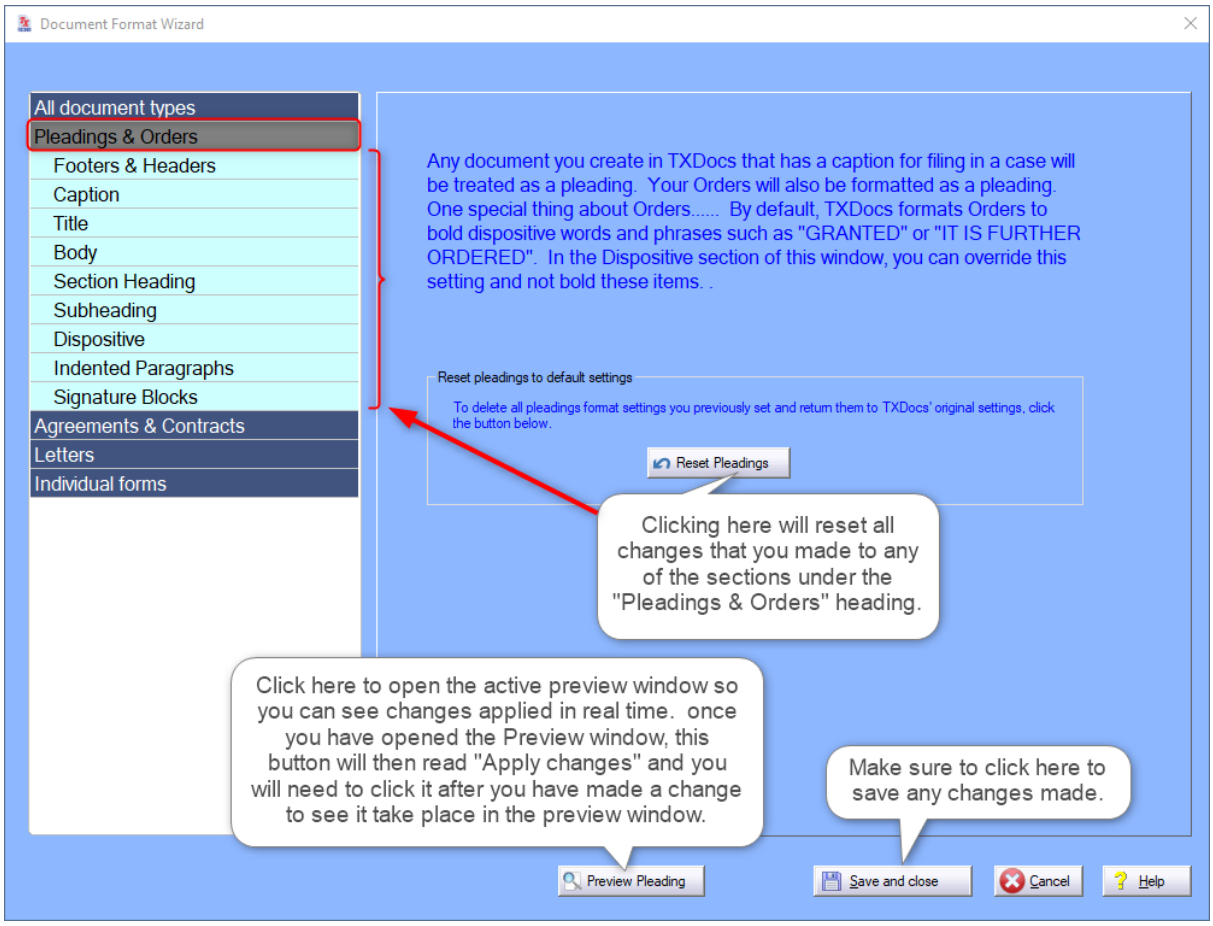
The selections you make here will apply to all documents unless changes are made to specific forms under Individual forms.



Pleadings and Orders

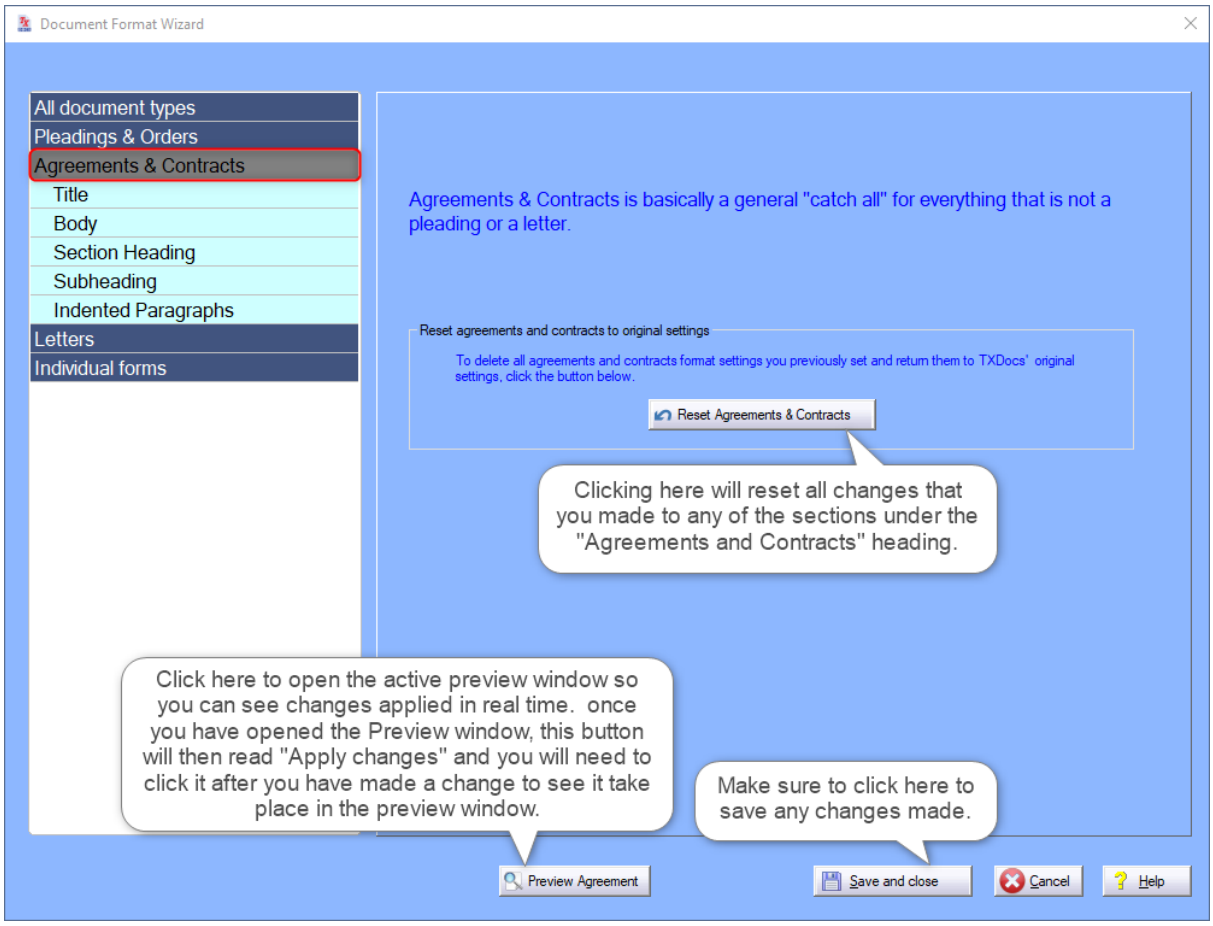
Select this tab to make changes to any pleadings you will create in TXdocs. If you want to customize the Header/Footer make the

necessary changes on the respective tabs and select OK to finalize the changes.

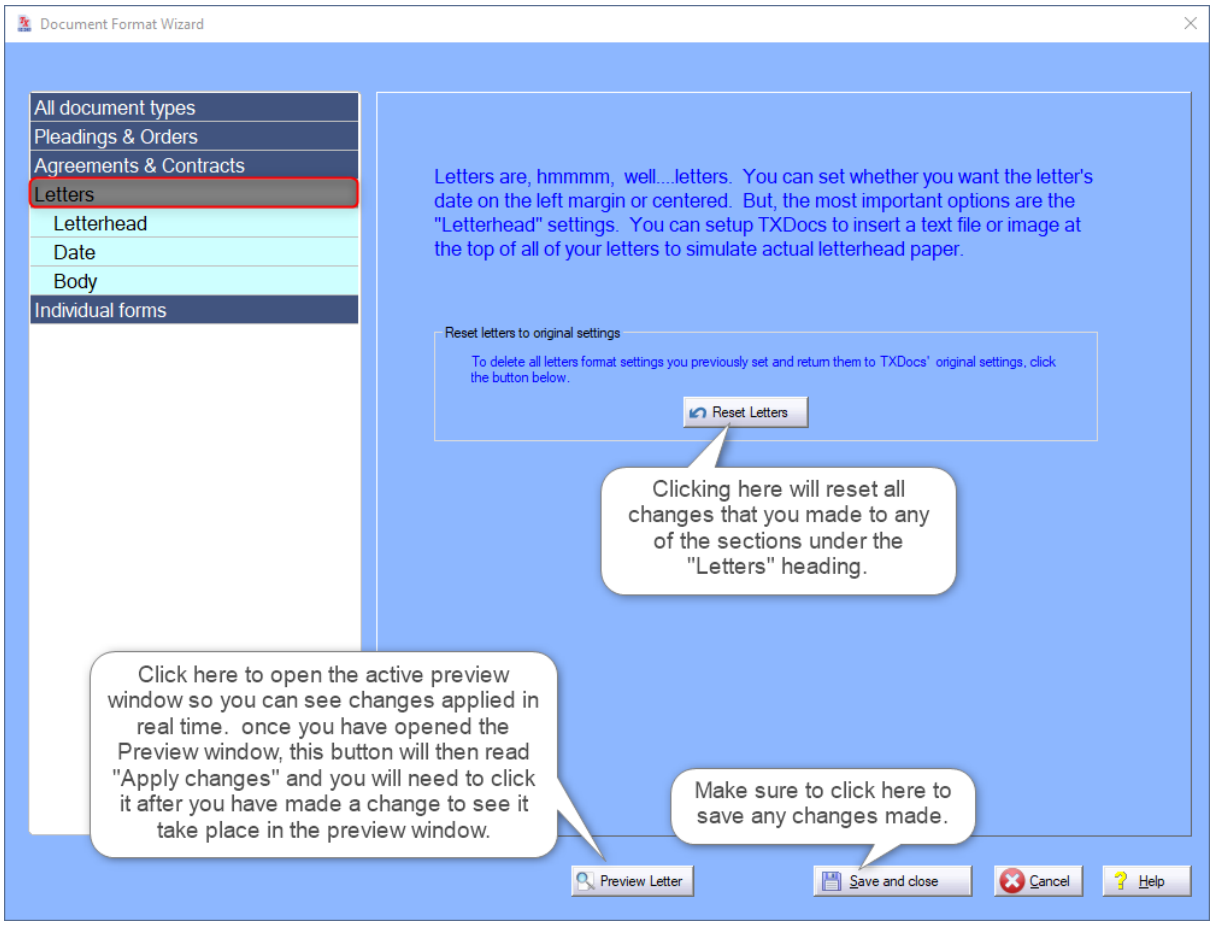


Agreements & Contracts

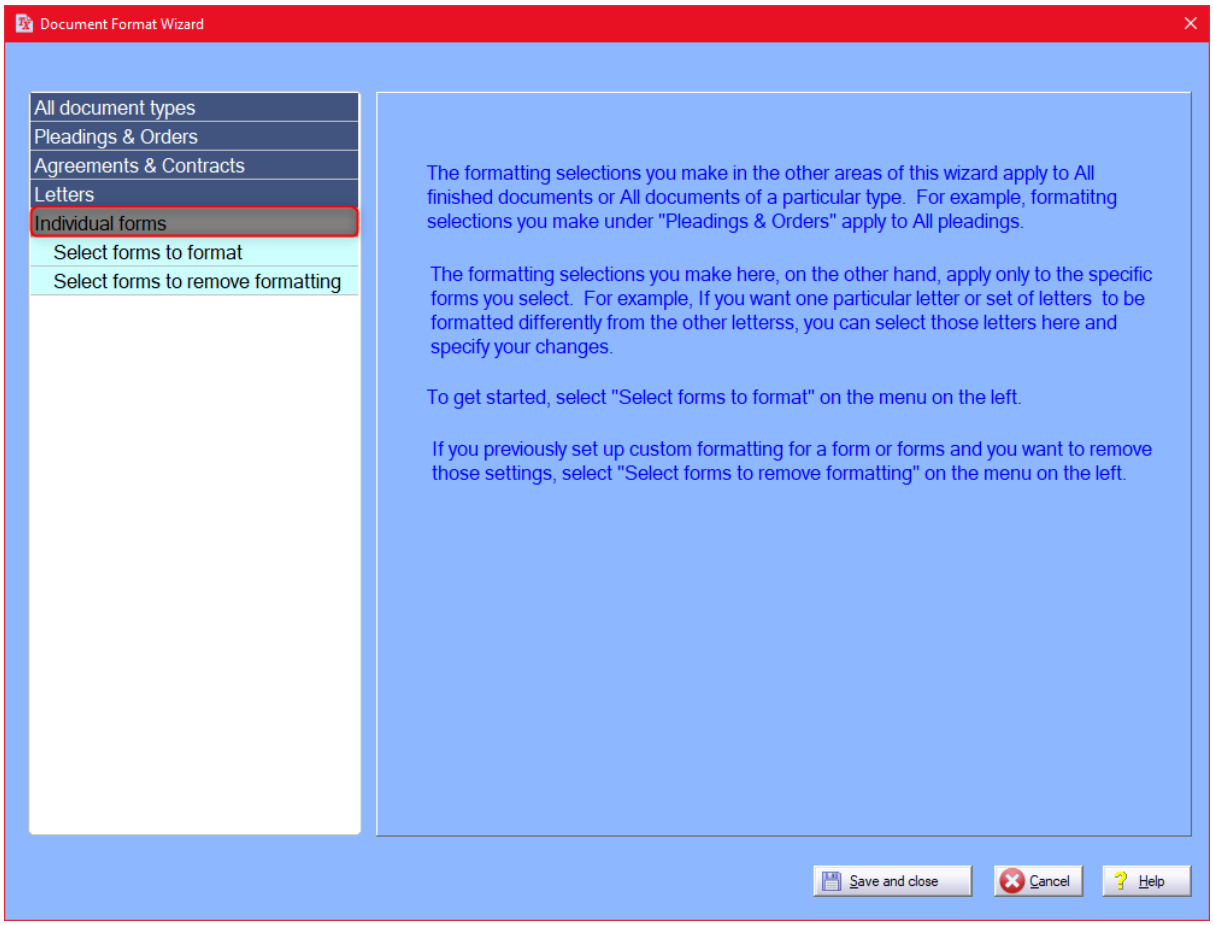
Here you can make formatting changes that will be applied to all Agreements and Contracts you may assemble in TXdocs.



Letters



Individual forms



2.6 How to Manage Form Sets

If there are groups of forms you normally assemble, you can set them up as a form set. Then, when you want to assemble all of those forms at the same time, you can select all of them with a single click.

To Build a New Form Set

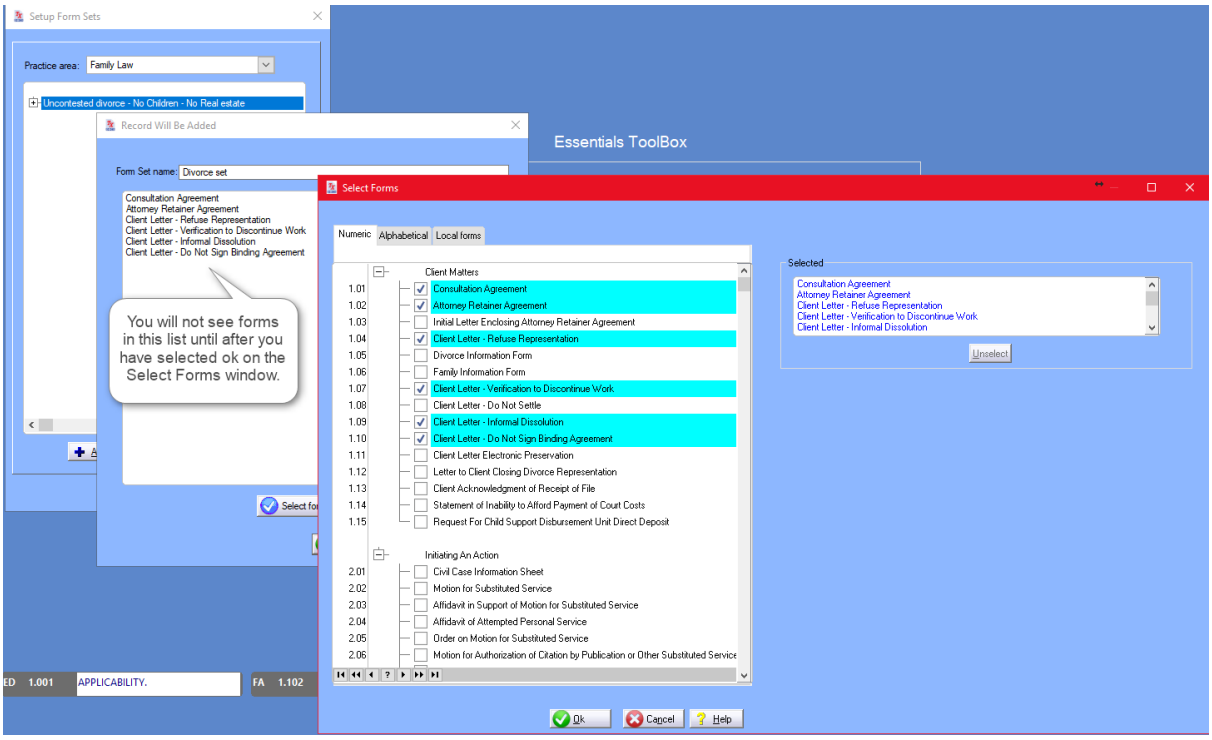
1. Open Setup/Document Assembly/Formsets from the main menu to bring up the Setup Form Sets panel.

2. Select the Practice Area (Family Law, Civil Litigation, Probate, Real Estate, etc.) for which you want to create a set from the drop-down menu.

3. To create a new form set, click Add. This opens up the Record Will be Added form where you create a form set by naming it.

4. Click the Select forms for this set button to display a list of forms from which to choose. You can view the forms by number or alphabetical order. The bottom pane shows the list of forms to be included in the form set.

5. Select the desired forms and click OK.



6. To remove a form from the form set, highlight the form title in the right-hand pane of the Select Forms panel and click Unselect.

7. Click OK to save your changes and return to the form set.

Your form sets are now ready for assembly. TXdocs assembles the forms and launches the question and answer portion of the assembly.

To Edit or Delete a Form Set

To edit a form set, click the Edit button found on the bottom of the Setup Form Sets panel. This opens the Record Will Be Changed form where you can edit the name of the form set.

To delete a form set, click the Delete button found on the bottom of the Setup Form Sets panel. Deleting a form set does not delete the forms. It only removes the set from the list of form sets.

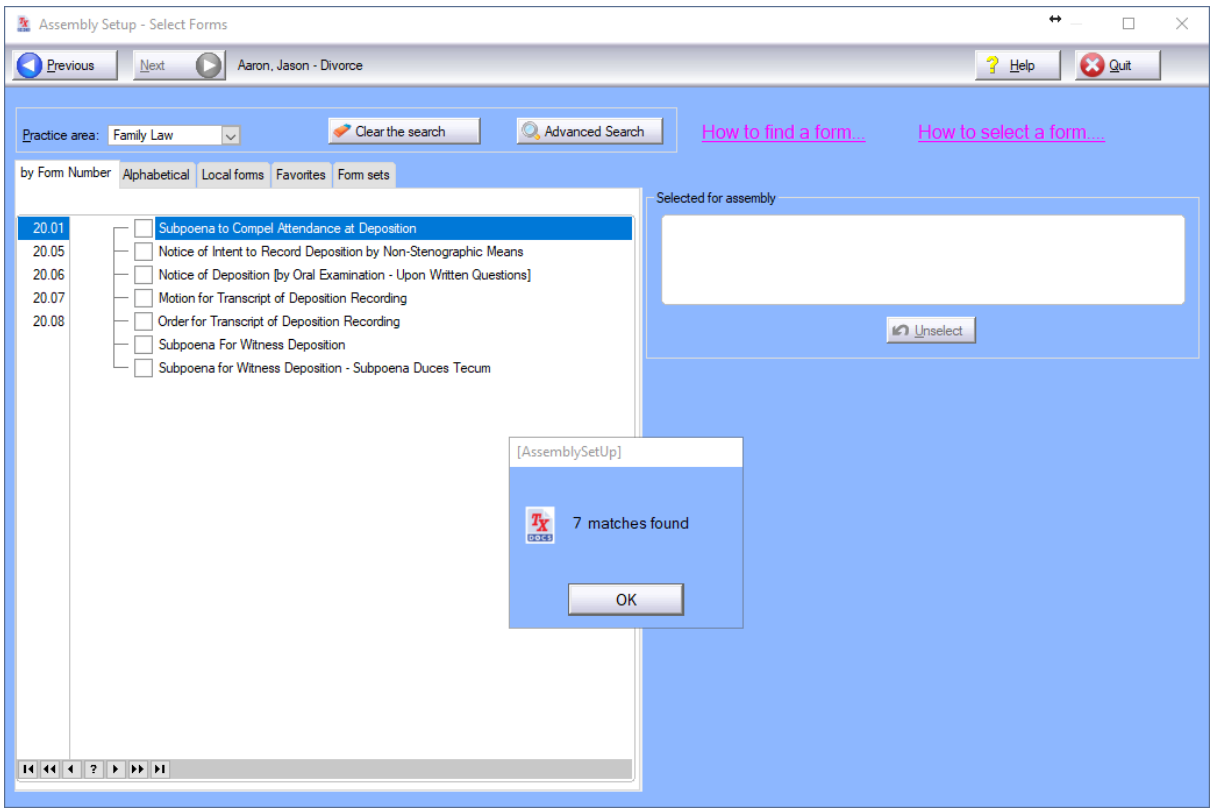
2.7 How to Find a Form

1. To locate a form, open File/Assemble Documents or click the Assemble Documents button.

2. Select a case for which you wish to add a form and click Next to open the Assembly Setup - Select Forms window.

3. Here you can select the Practice Area of your choice in the pull-down menu. TXdocs offers forms in Family Law, Civil Litigation, Probate, Guardianship, Criminal Defense, Business Organizations, Real Estate, Wills, and Landlord Tenant.

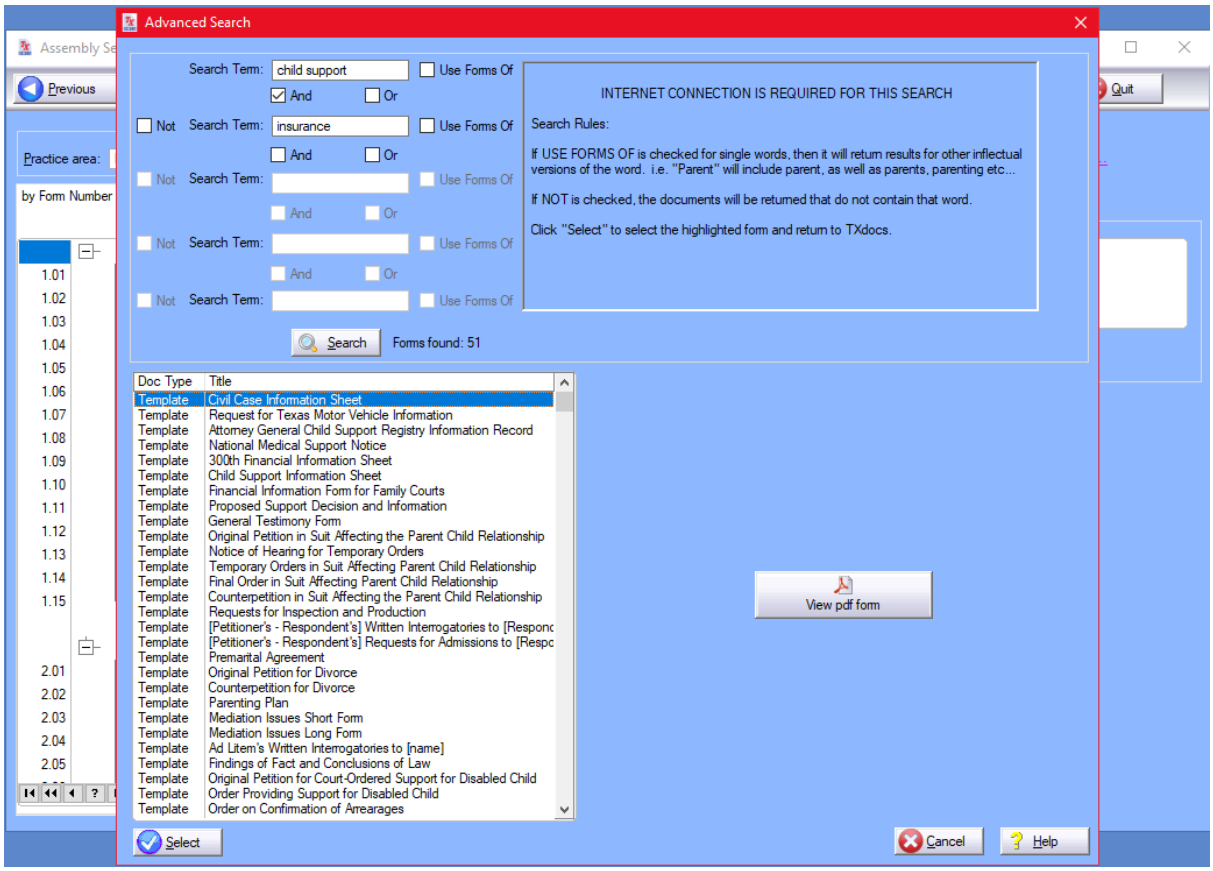
4. Next perform a keyword search to retrieve a specific form, or you can scroll to find the displayed forms by form number or alphabetical order if you know the form title.



TXdocs also provides an Advanced Search to search the TXdocs forms/templates library for particular language within the form. You can access the Advanced Search engine on the Assembly Setup - Select Forms window - the same window where you search the TXdocs library for forms.

1. Click the Advanced Search button under the key word search field. This brings up the Advanced Search window.

2. Follow the Search Rules on the right side of the instructions when entering search criteria to deliver the best results.



2.8 How to Add, Edit and Delete Client Documents

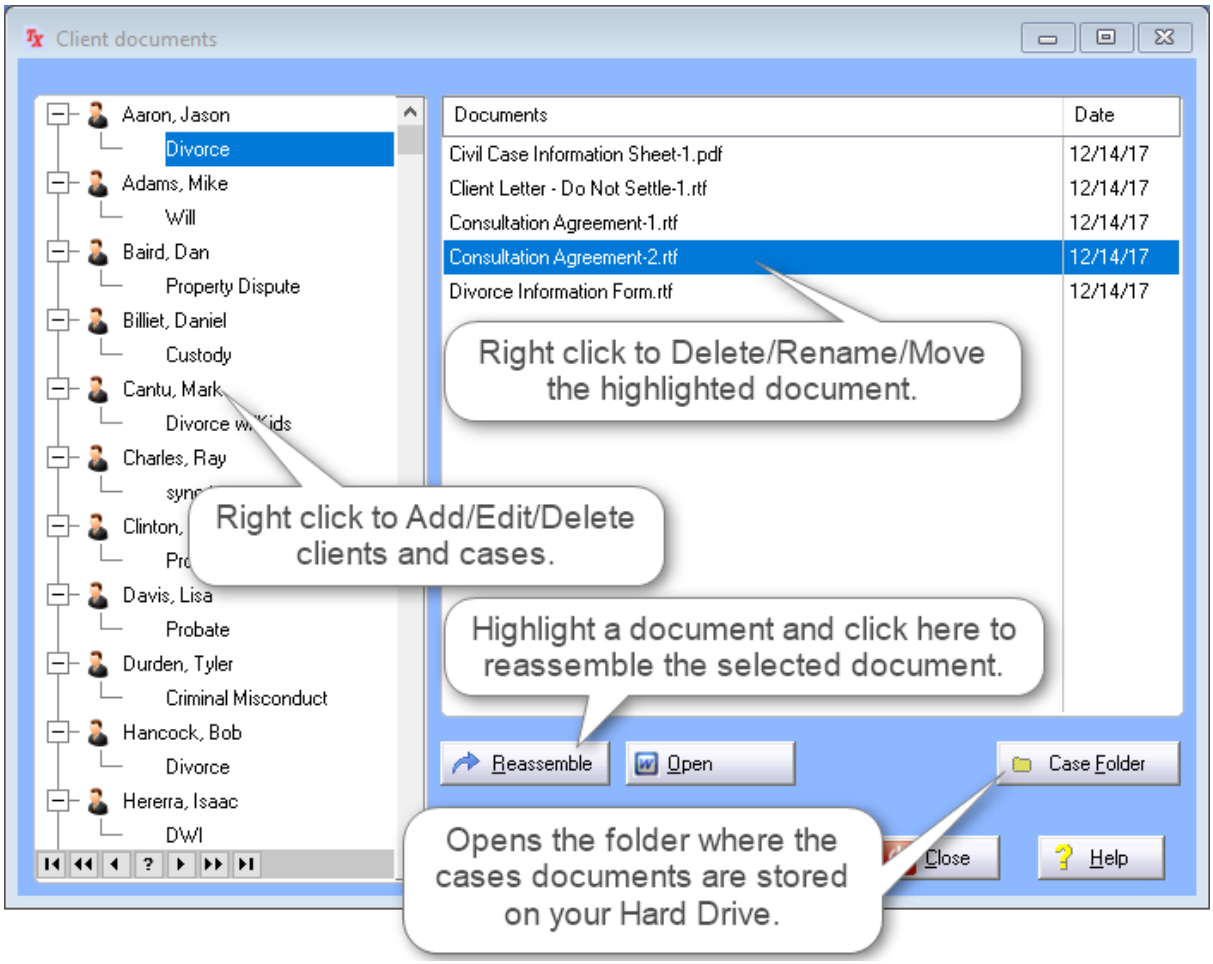
TXdocs remembers all documents you assemble for every case. The client documents window is how you find those documents when you want to print another copy, open them in your word processor again, or reassemble them with new information.Simply highlight a case in the left

list and all of the documents you have assembled for that case are displayed in the right list.

Click Open to open the highlighted in your word processor or .pdf viewer.

Click the Reassemble button the reassemble a document. You would do this when you want to change one or more answers that change the completed document.

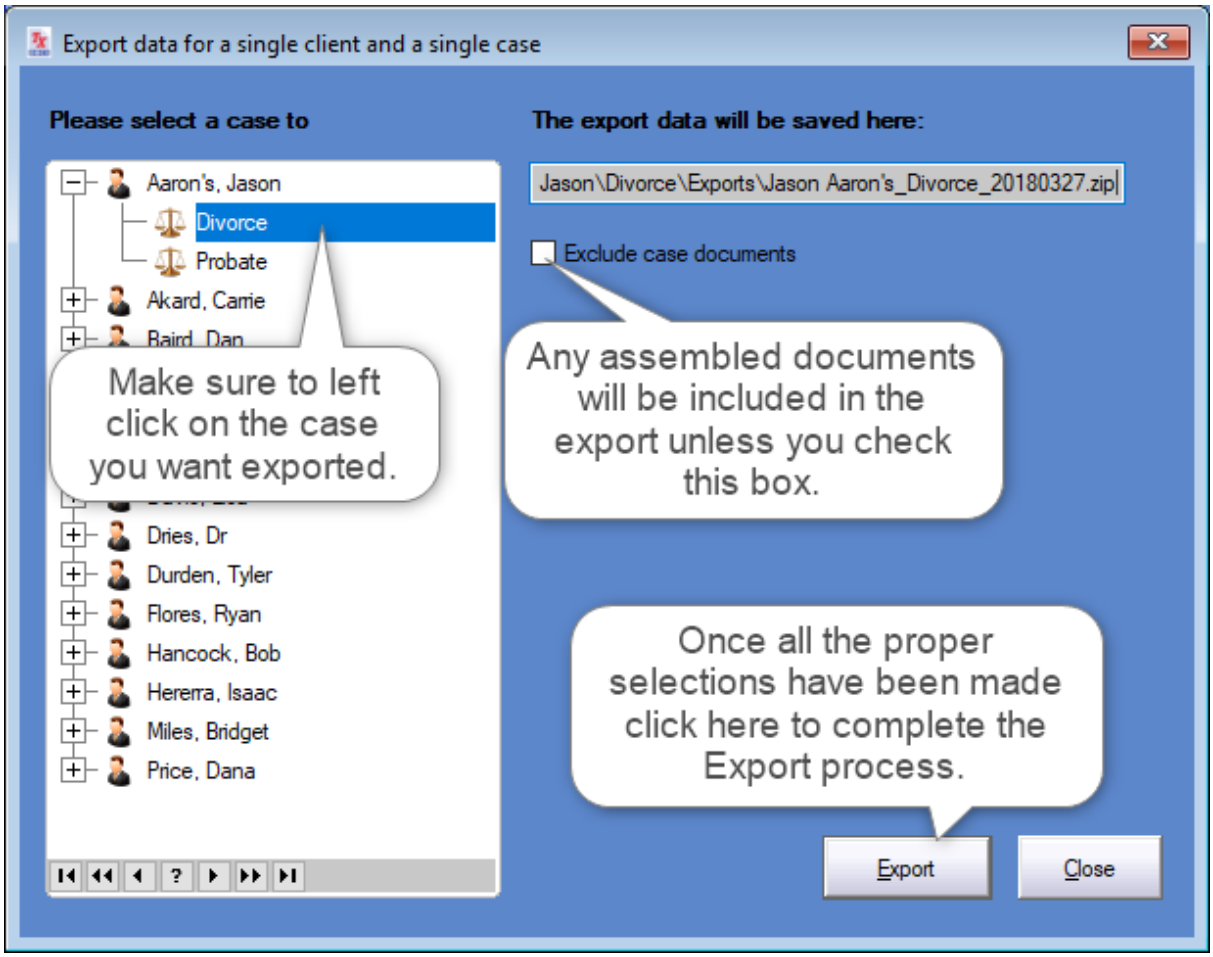
HINT: As with all lists in TXdocs, you can right click on a list and get a pop up menu allowing you to add, edit, delete, etc. items in that list.



2.9 How to Export/Import a single case

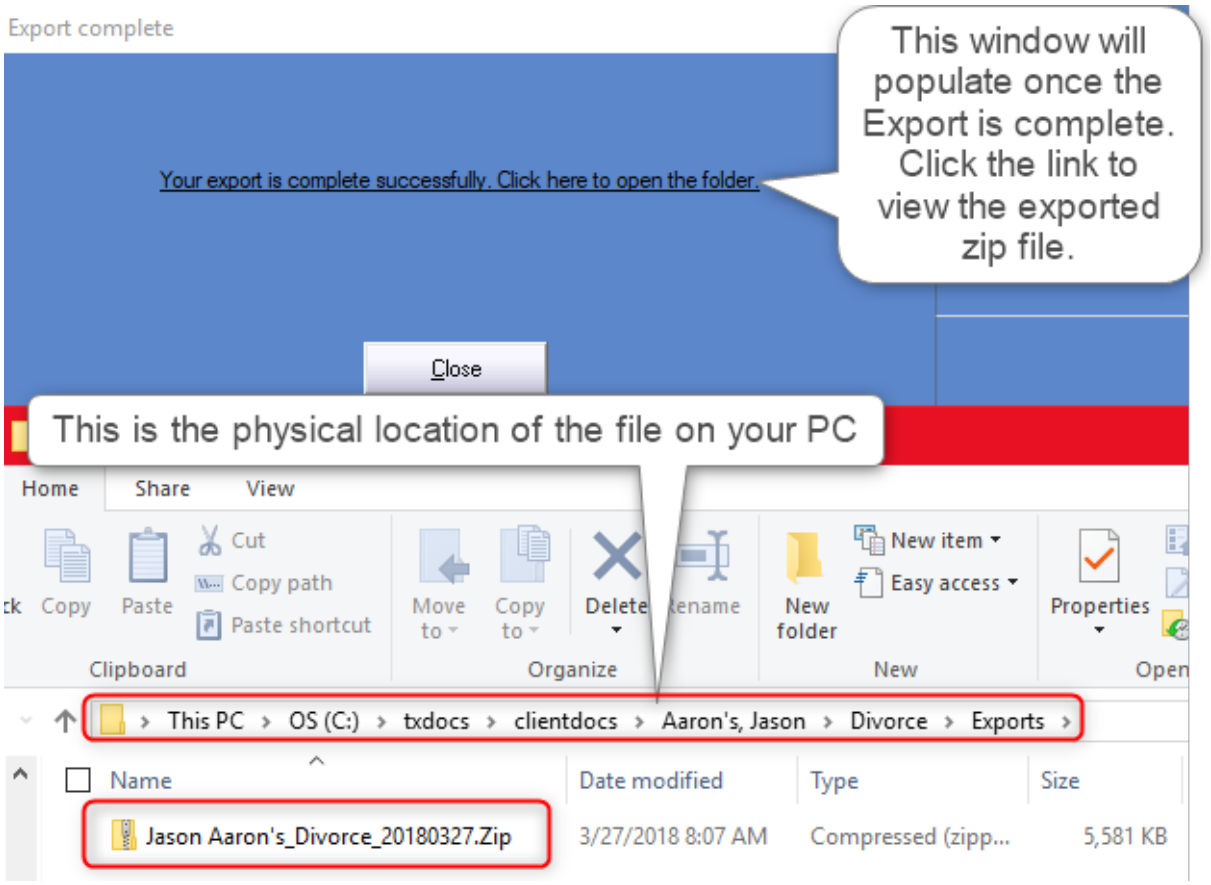
This feature is very beneficial for Classic users that have TXdocs standalone installs on different PC's (PC in the office and a PC or laptop at another location). If you are going to be out of the office where you primarily work and need access to cases in TXdocs, you will now be able to export the cases with the data as well as the documents you have assembled for that case. The exported zip folder will contain everything you need and can be easily stored on a USB storage device or other storage media. It is important to know that you do not need to create a client or case for this person at the destination where they will be imported as this will create a duplicate and may cause confusion.

Export a single client and single case

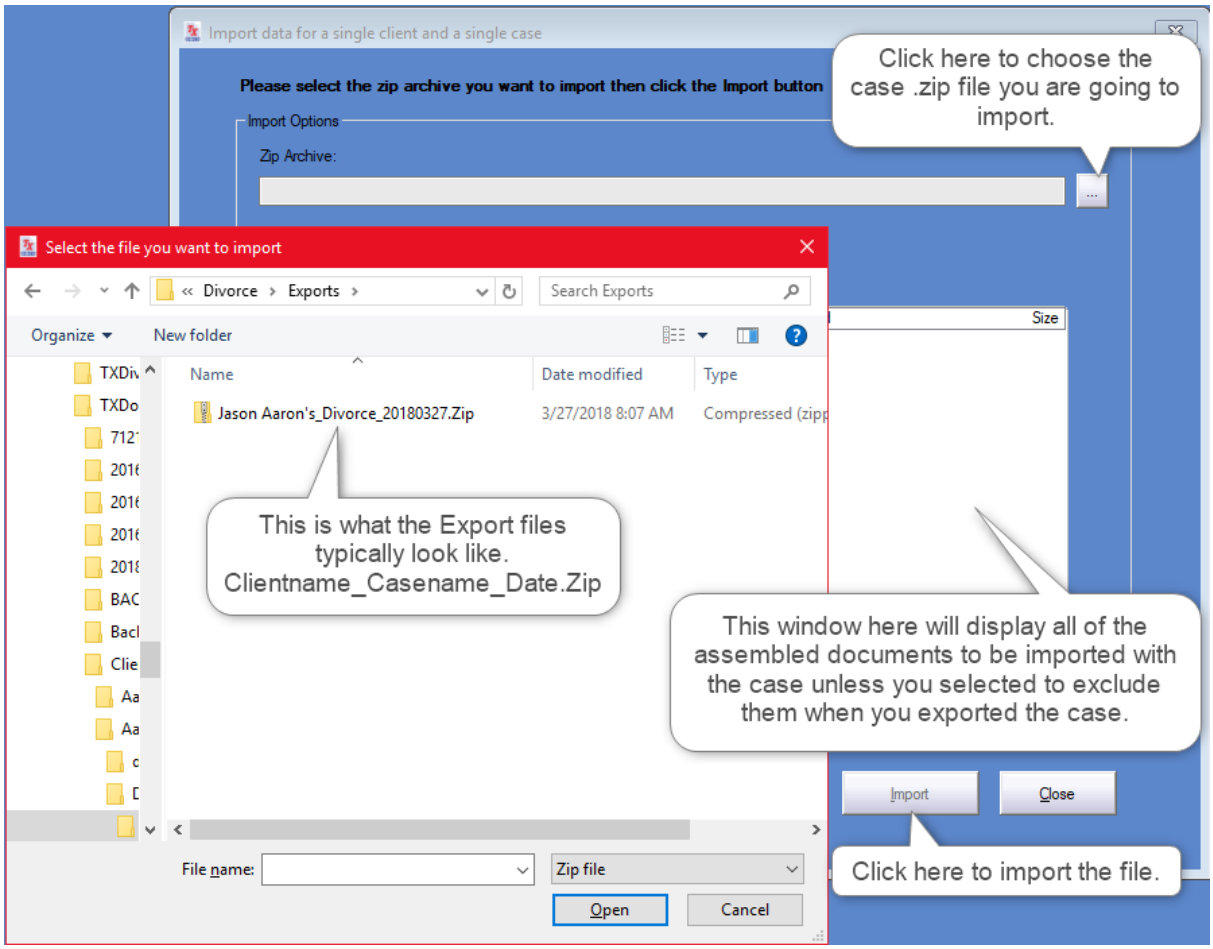


Accessing your case Export

At this point you can Copy/Move the file to a portable storage device for transfer so you can then import into another TXdocs database.



Importing an Exported case



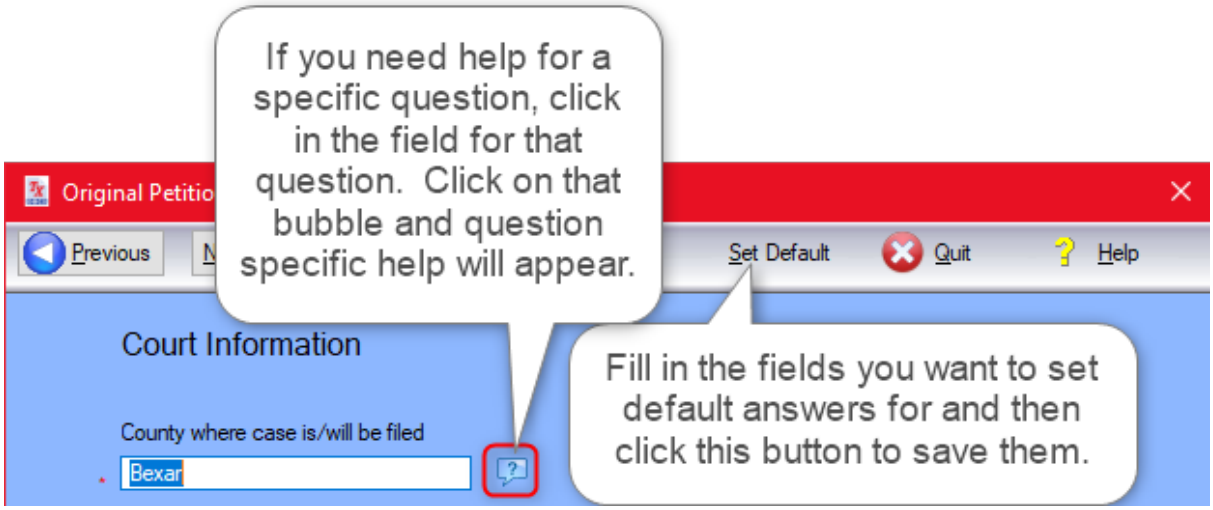
2.10 How to Set Default Answers

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. That button is found on

the top toolbar of every panel when you are answering questions. See the screen below.

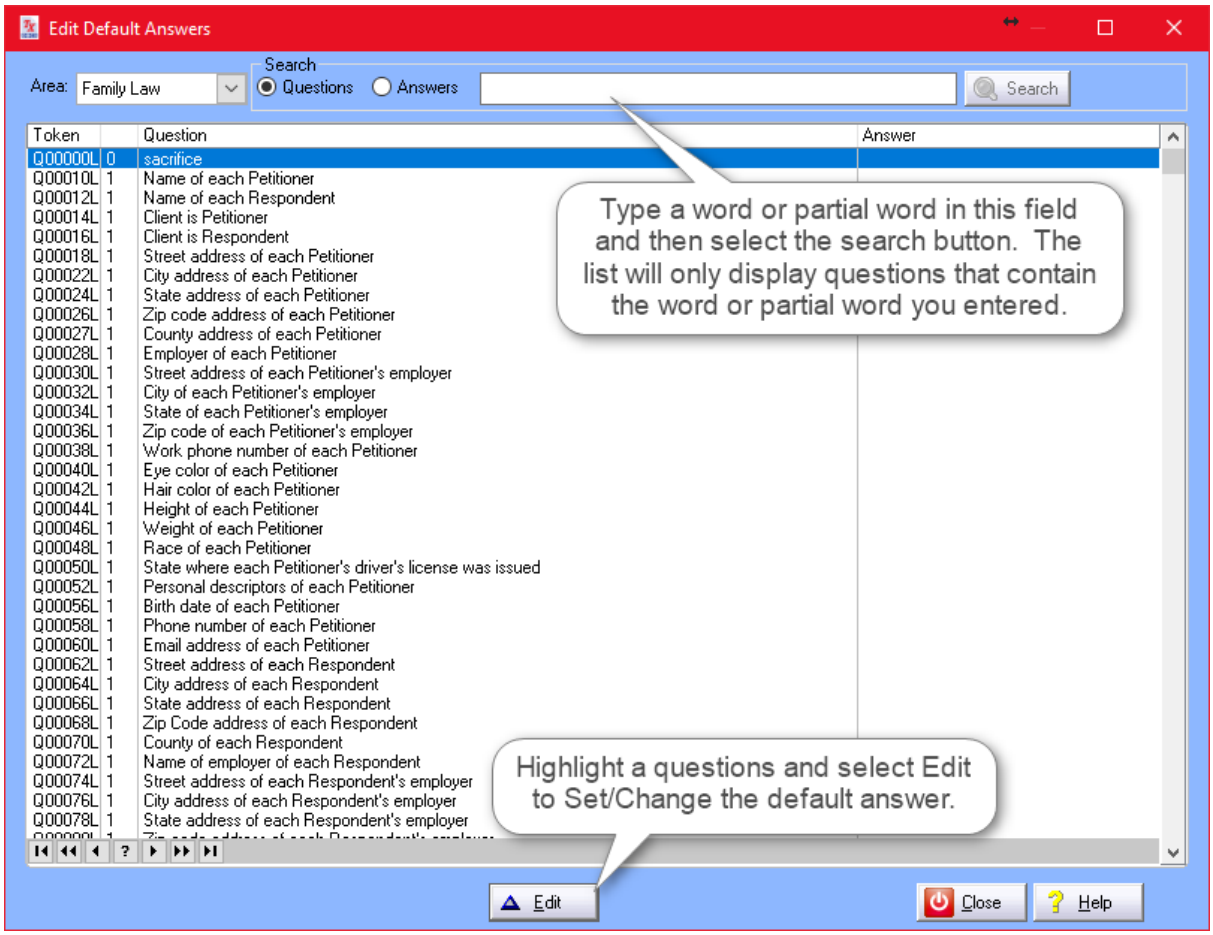


You can also set, edit and delete default answers from the Main Menu/Edit .

How to Set Default Answers from the Main Menu

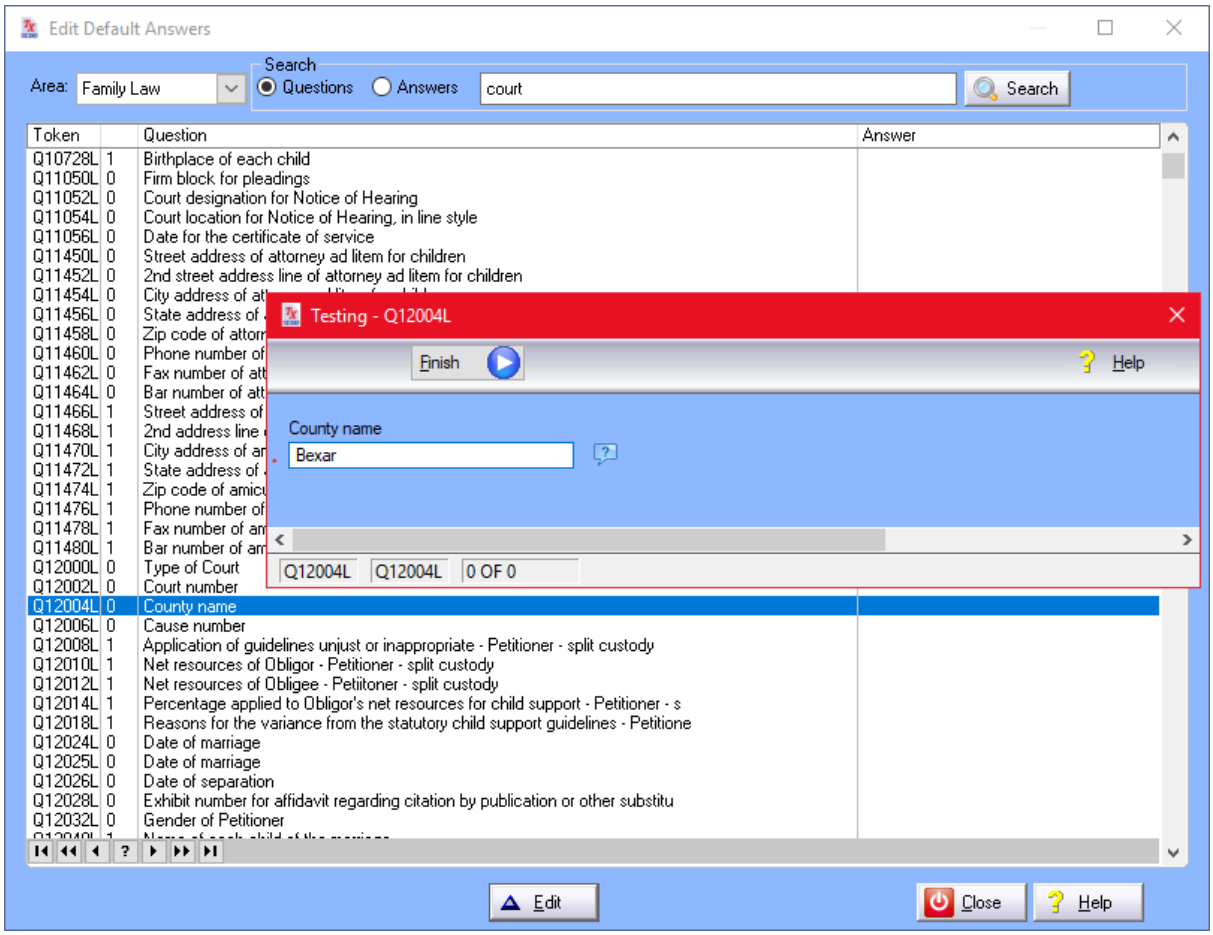
1. Go Main Menu/Edit/Default Answers launches the Edit Default Answers panel which displays an extensive list of common default question/answers.

2. You can search the list by the type of question or by the answer.



3. Highlight the question for default answer, double click it or select the Edit button. These actions bring up the Edit window with a "canned" answer or a blank entry answer field for you to complete. You can choose the canned answer or overwrite it with another answer.

4. Enter your answer and click "Finish."

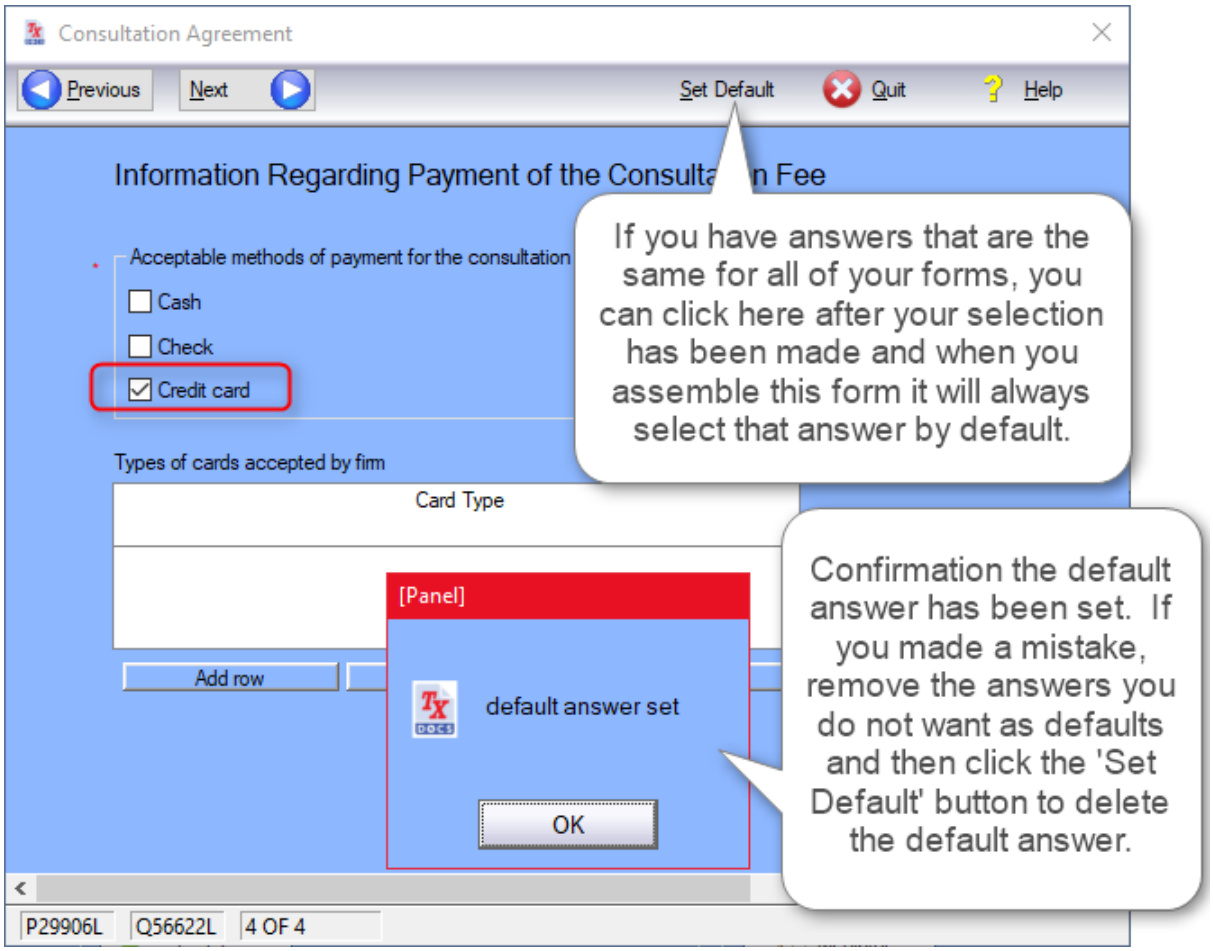


How to Set Default Answers during Assembly

During assembly, the default answer will appear in the answer field of the corresponding question form.

1. Click "Set Default" button found at the top of the form. For example, if the county for the respondent is being answered and the displayed answer is "Bexar," then clicking Set Default will be save "Bexar" as the default answer. From then on, "Bexar" will appear as the default answer for the respondent's county.

2. To change a default answer without making it *the* default answer, you simply type over the displayed answer *without* using the Set Default option.



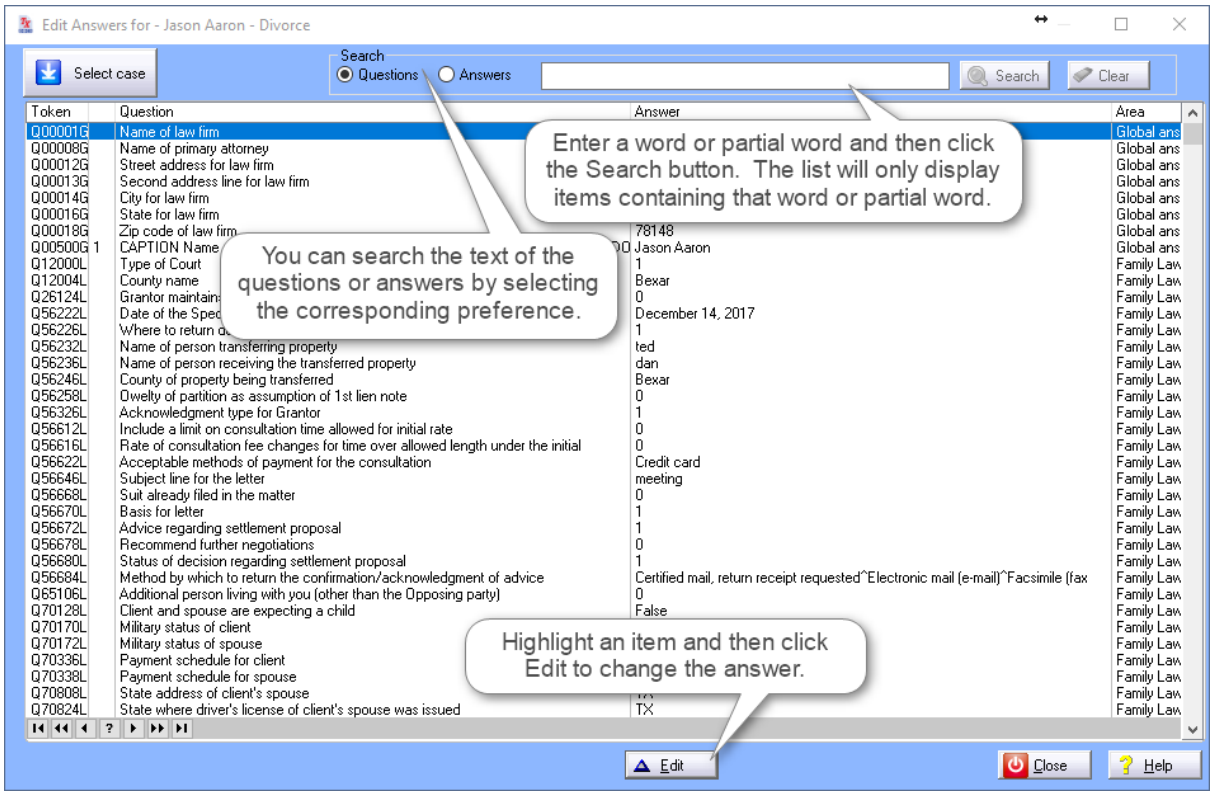
2.11 Edit Answers Window

While you can always change answers while assembling documents, you can also change a case's answers using the Edit Answers window. After you edit and save the case answers, any documents you assemble after that will use the new answers.

1. Open Edit/Answers from the main menu to launch the Edit Answers panel.

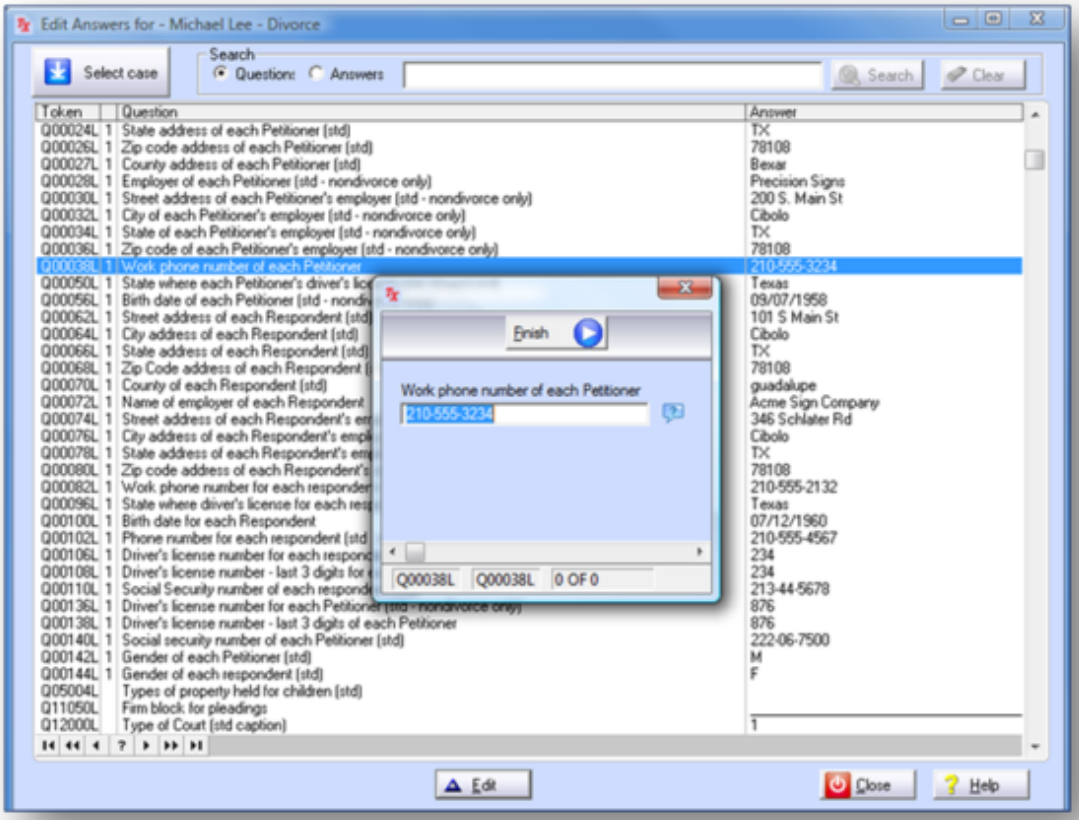
2. Click the Select Case button to open a list of clients and cases from which to choose. Selecting a case populates the window with a list of questions and their answers.

Note the client name and case title are displayed on the top of the panel as a reminder.



3. Perform a search by keyword or answer to find the answers you wish to edit. You can search the questions or answers. Select the Clear button to return to the list to start a new search.

4. Highlight the answer listed in the search results and click Edit or double click to bring up the Edit window.



5. Edit your answer and press Finish. The new answer is displayed in the list of questions/answers.

NOTE: The changed answers are not actually saved until you click the Close button.

2.12 How to Divide Property and Assets/Debts

The negotiator lets you create different proposals for dividing assets and debts of the marital estate. All assets and debts, their descriptions, value and ownership are listed in their respective estates: Community, Petitioner's Separate Estate and Respondent's Separate Separate. Assets include every item acquired before and during a marriage - from clothing to private collections (guns, antiquities) to property (vehicles, real estate) to financial (investments, debts, credit cards) to insurance policies.

Retirement Plans/Benefits are listed in a separate panel to accommodate the special division of benefits. Here you can add, edit, or delete plans. You can also change the percentages of plans/benefits in the Estate and Division column field. To adjust a percentage, simply click on the percentage you want to change. Up/Down arrows will appear next the selected percentage. Hold the arrow up or down until the desired number is reached.

Reimbursement claims are also separated. Property Negotiator gives you the ability to include an Award of Reimbursement Claim in a decree. It also provides a tool to "equalize" financial assets by specifying a dollar amount the Equalization Payment panel found on the right side of the estate windows.

If you forgot to add an asset/debt, you can add it in Property Negotiator just as you did in Property Inventory. Refer to Add, Edit, and Delete Assets and Debts for more instructions.

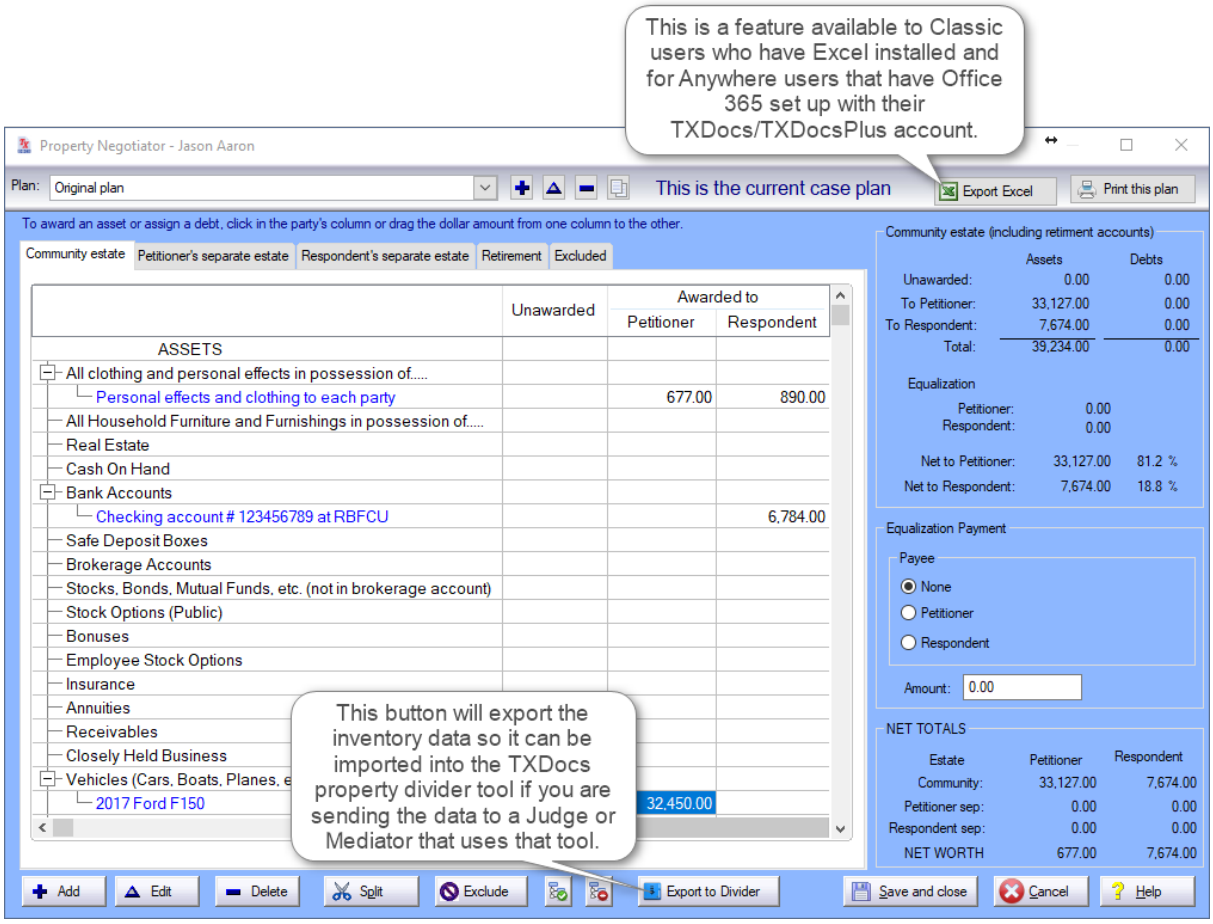
The Property Negotiator lets you assign or award a debt to the petitioner or respondent. Unawarded items will not be addressed by the decree. It even lets you take an item off the negotiating table by Excluding it.

To Award an Asset or Assign a Debt

There are two ways to perform this task.

1. In the Awarded To columns: Click on the respective party in the Awarded To columns and drag the value (dollar amount) of an item from one column to the other (i.e. Respondent to Petitioner).

2. In Edit mode: Click to Edit an asset or debt to bring up the Editing Information form. In the form, locate the Estate radio buttons and select the estate of choice.



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

2.13 How to Change Firm Information

Your firm address, phone number and email address can be added or updated from the main menu. Click Setup/Account to open the window where you can access information about your firm, license and payment options. To change your firm name, please contact TXdocs Customer Support.

To Set Up Firm Information

1. Click Setup/Account on the main menu and select Firm Information from the list. Click Edit.

2. Enter your firm address as you want the information to appear in assembled documents and client statements.

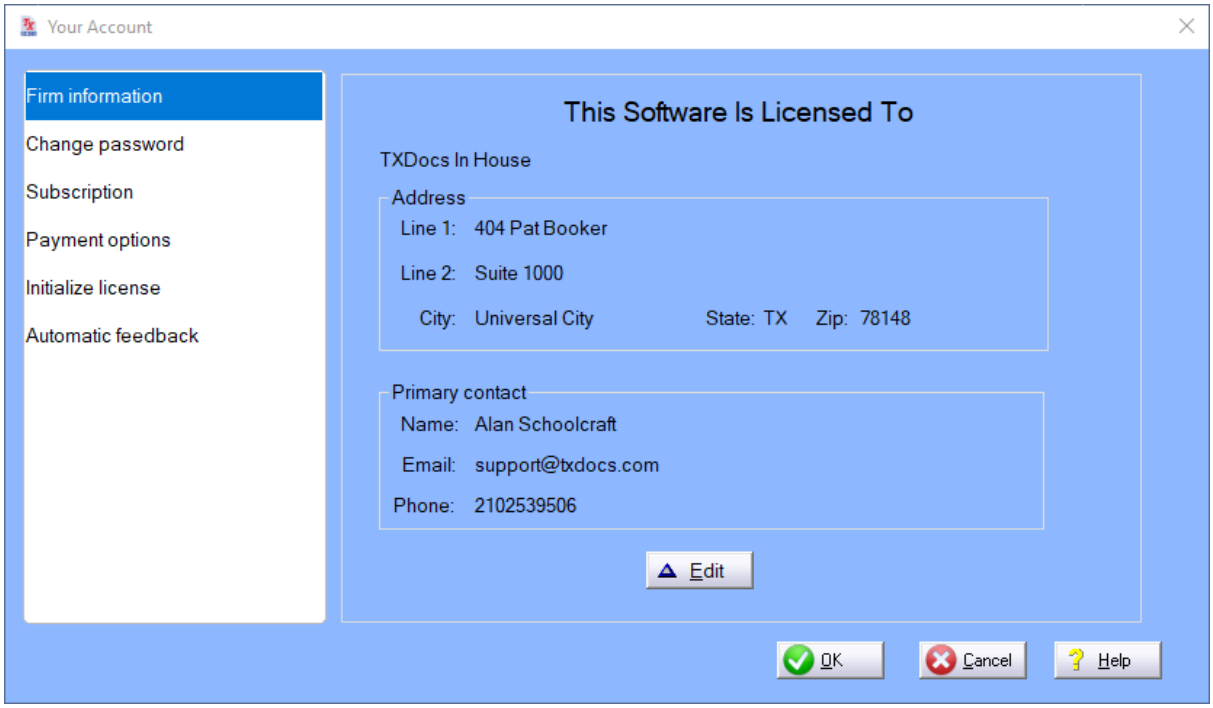
3. Click Submit when finished to save changes and close the window.

To Edit Existing Firm Information

1. Firm Information should be highlighted. If not, highlight it and firm information is displayed on the right side. Click Edit.

2. Enter new information or edit existing information by typing in the fields.

3. Click Submit when finished to save changes and close the window.



2.14 How to Change Storage Location of Assembled Documents

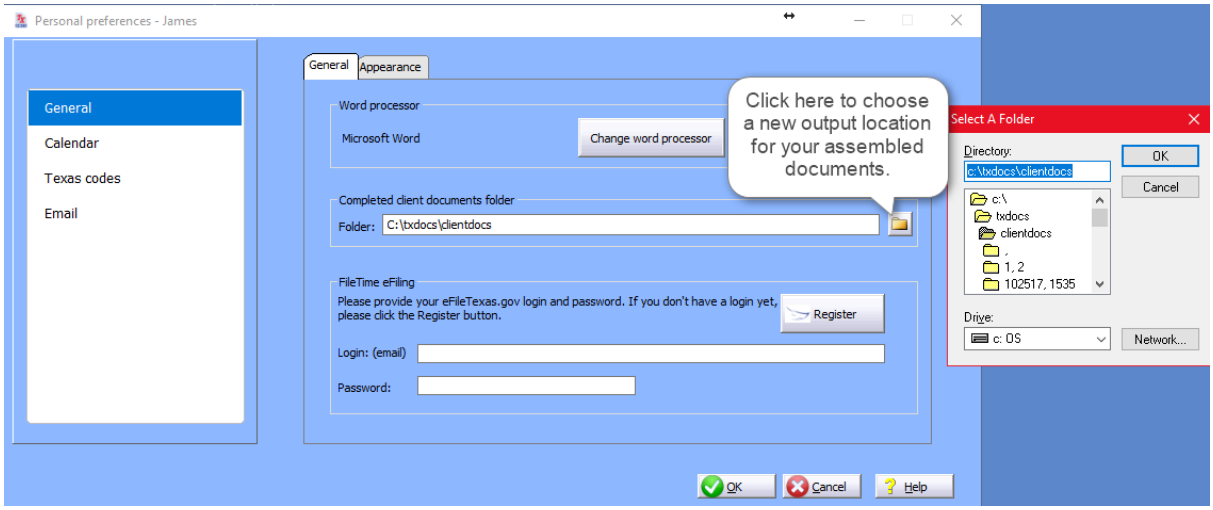
Assembled documents are stored in the Completed Client Documents folder. TXdocs lets you specify the location of this folder.

1. Select Setup/Preferences from the main menu to bring up the Program Preferences panel. You will see a field for the Completed Client Documents folder.

2. Type in the folder path if you know it, or you can browse and find the folder location by clicking the Folder icon button which brings up the Browse For Folder window.

3. In the Browse For Folder window, scroll through the list of folders to find the desired folder location, or create a location by clicking on the "Make New Folder" button.

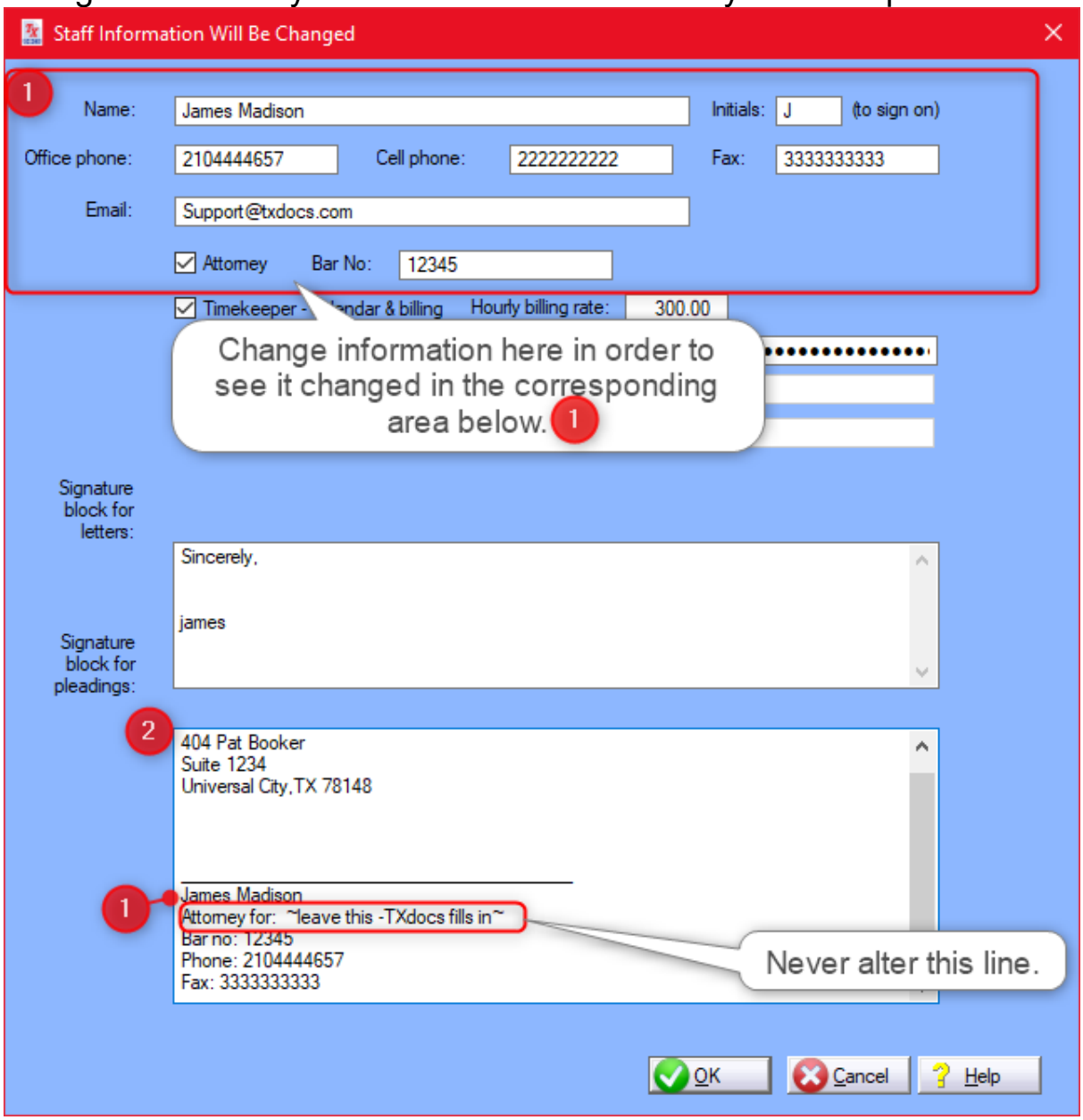
Highlight the desired folder. You will see this folder displayed in the Folder field below the list. Click OK to make this your default storage location.



2.15 How to Edit your signature block

When you initially create your staff profile a signature block is created. In the event you need to change your signature block, this will guide you through how to correctly change your signature block. There are two separate areas you will need to go depending on what part of your signature block you are wanting to edit. If you wish to edit the firm name you will have to contact us and notify us of the changes you want made as this can only be done on our end.

To change the section numbered 1 you will make the changes in the "Staff information will be changed" window. After the changes have been made select **OK** and a window will pop up and show you the changes and once you have confirmed them they will be implemented.



To edit the section numbered 2 you will need to go to **Setup** and then **Account**. Here you can change the address for your firm. After you have changed the address and selected **OK**, go to the staff list select an individual and select **Edit** and then click **OK**. You will be shown the changes and asked to confirm them.

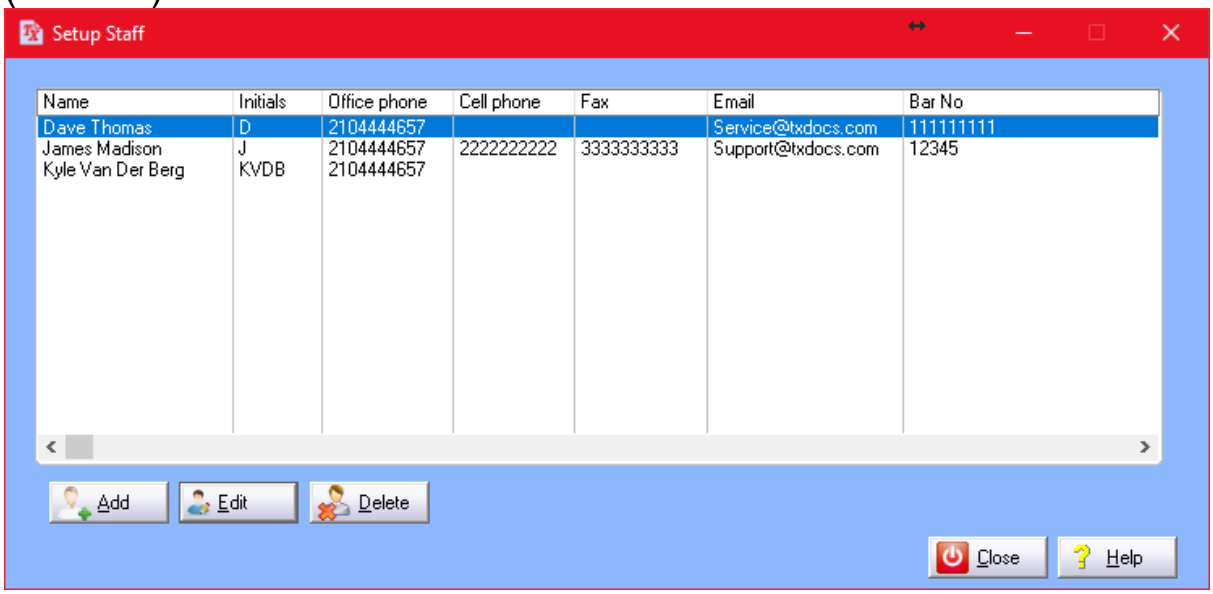
2.16 How to Change Staff Information

TXdocs provides a staff directory from which the application can draw to populate correspondence fields like addresses and signature blocks. Adding staff members' information into TXdocs can save time by eliminating the need to retype information every time you assemble documents. This feature is especially useful to staff members who sign correspondence.

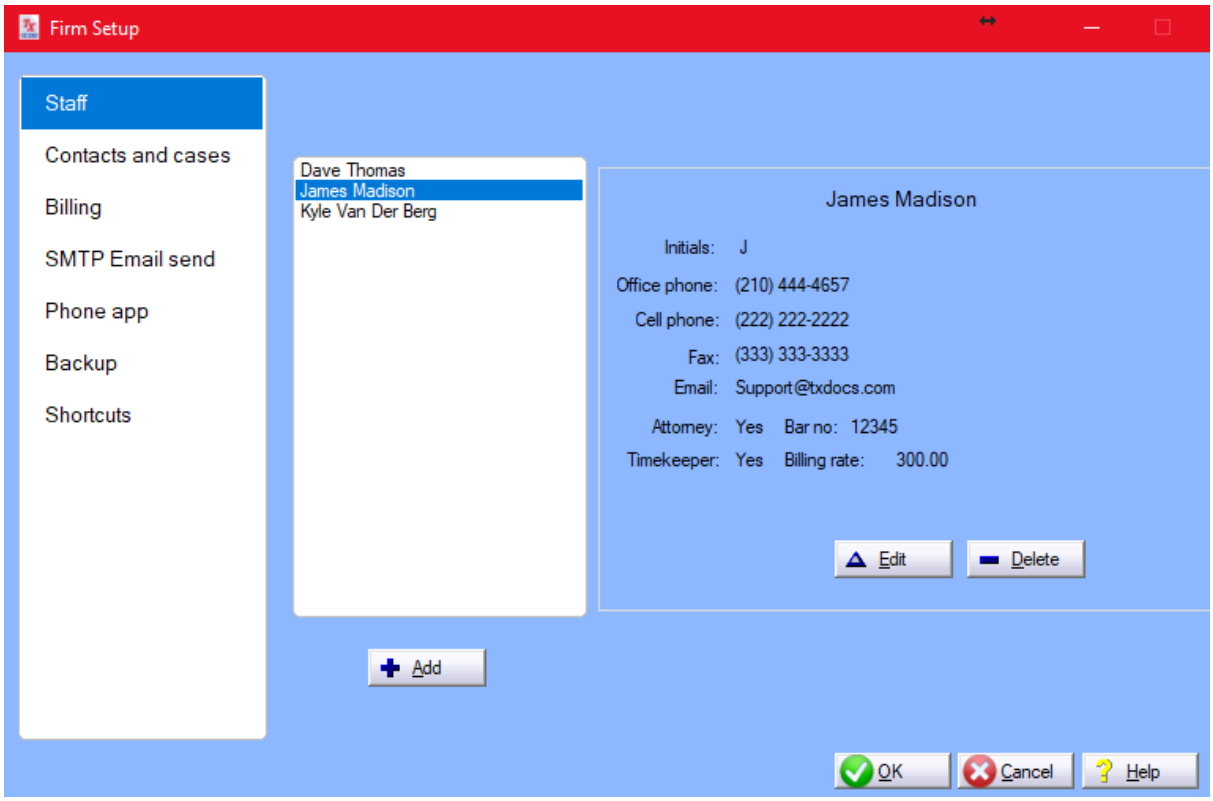
TXdocs offers form letters set up to use the "Correspondence Address" field. Additionally, the pleading forms can use the attorney's "Pleadings Signature Block."

1. Go to the Setup/Staff(TXdocs) or Setup/Firm settings/Staff(TXdocsPlus) on the main menu to open the Setup Staff window.

2. To add a new Staff member, click Add button or right click to choose the Add option.
(TXdocs)



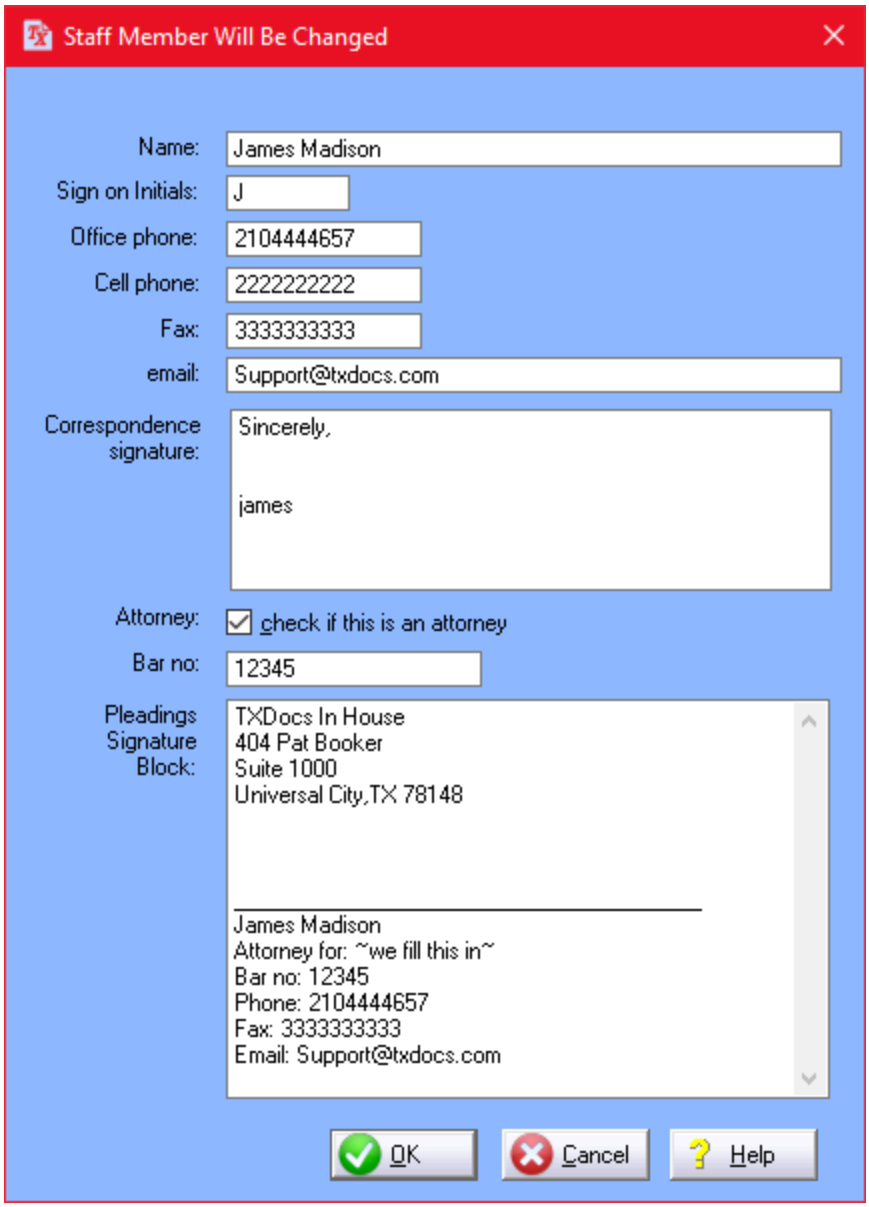
(TXdocsPlus)



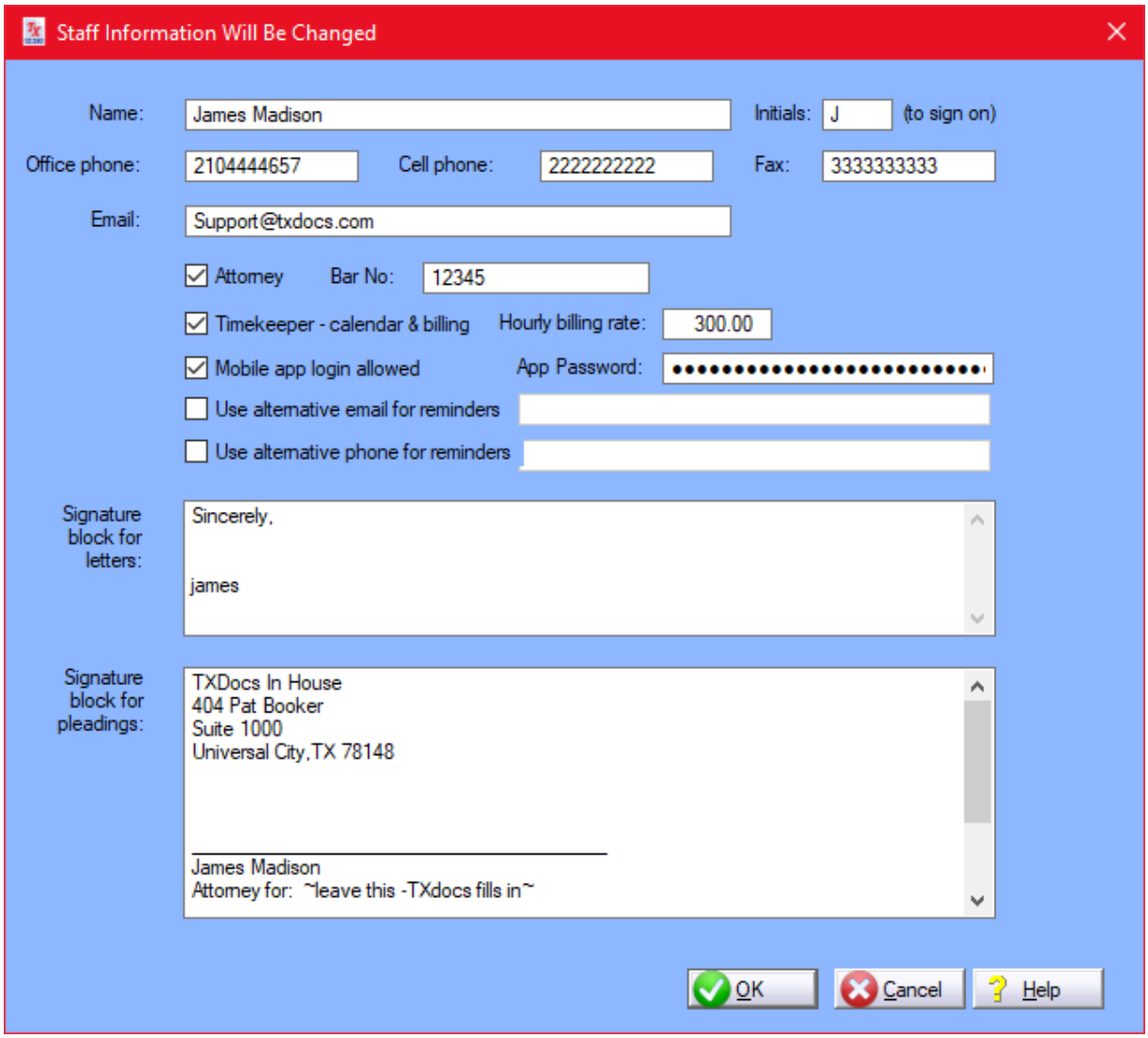
Once staff is entered, you can edit or delete a staff member.

3. To edit or delete staff, highlight the name and click the Edit or Delete buttons, or right click your mouse to the options. Double clicking a highlighted item also will bring up that form to edit.

(TXdocs)



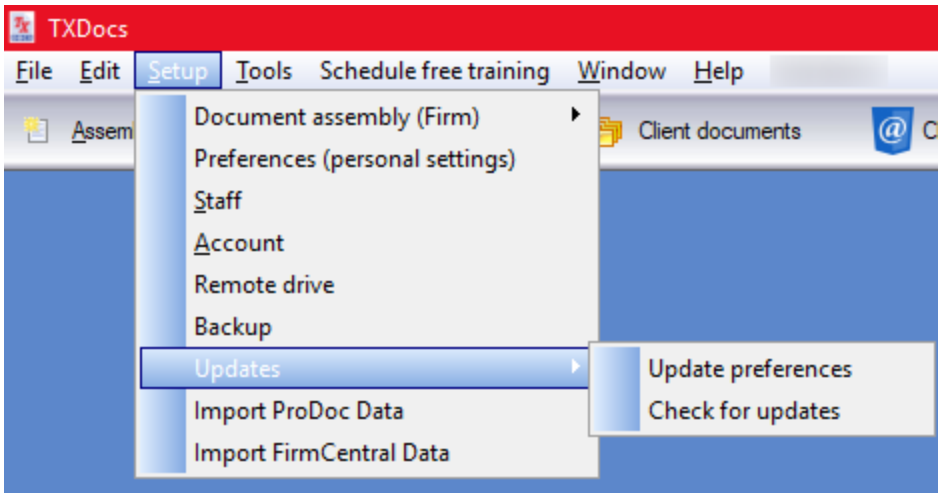
(TXdocsPlus)



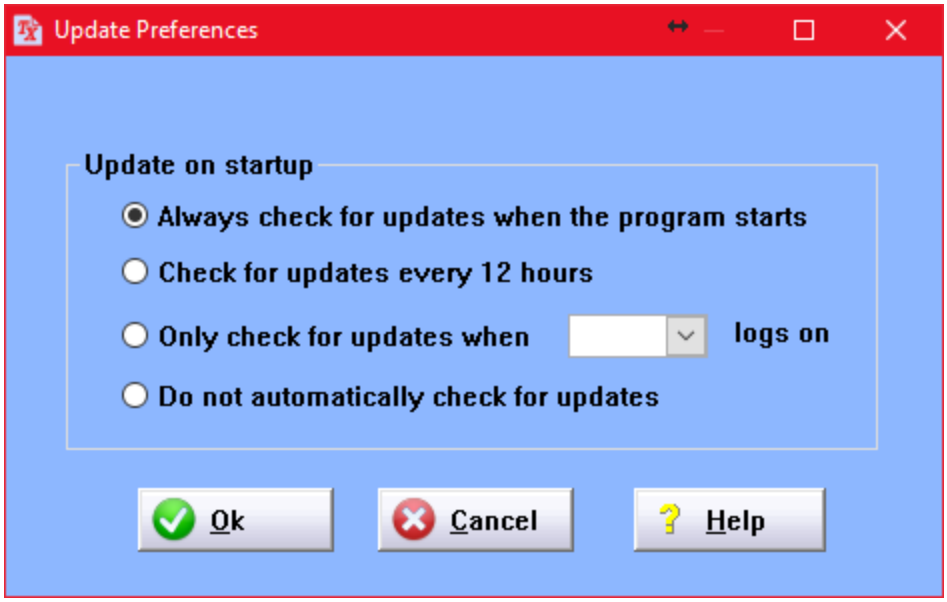
2.17 How to Update TXDocs and TXDocsPlus

TXdocs will automatically check for both software updates and content (templates and associated files) at start up or every 12 hours if you are running it on a local network server.

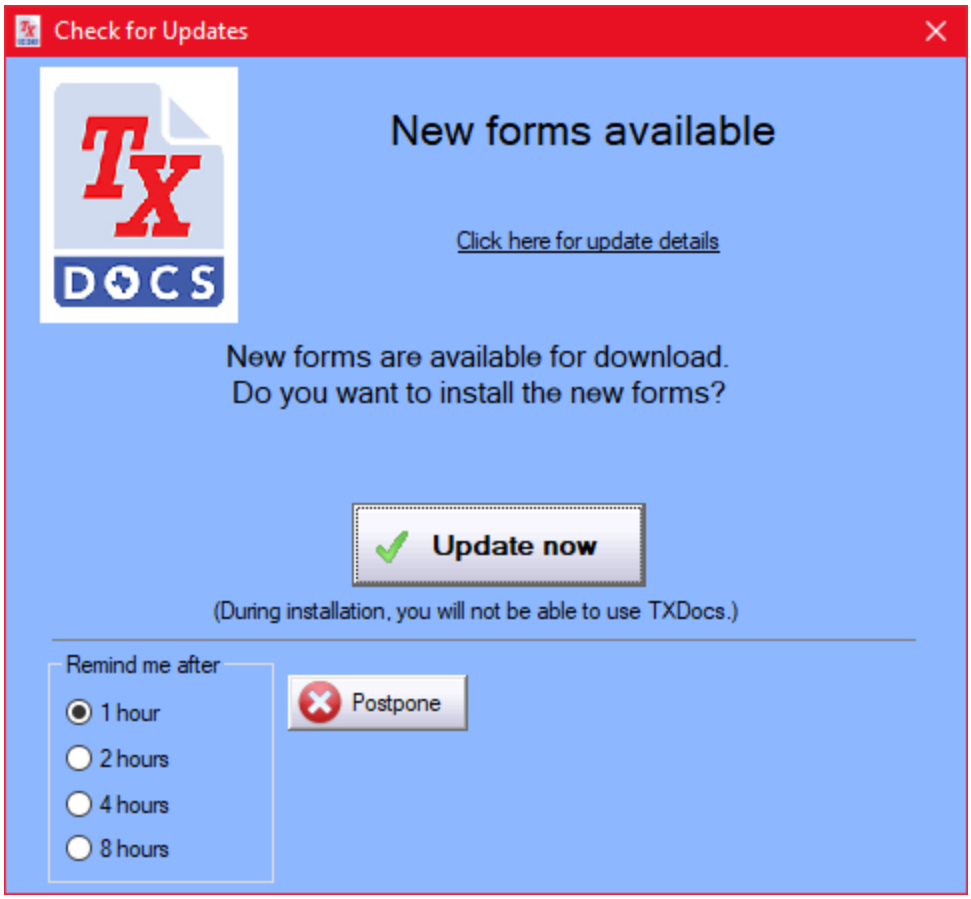
To manually check for updates, open Setup/Updates on the Main Menu and click "Check for Updates." TXdocs will automatically download and install the updates.



The Update Preferences window is where you tell TXdocs how often you want it to check for updates.



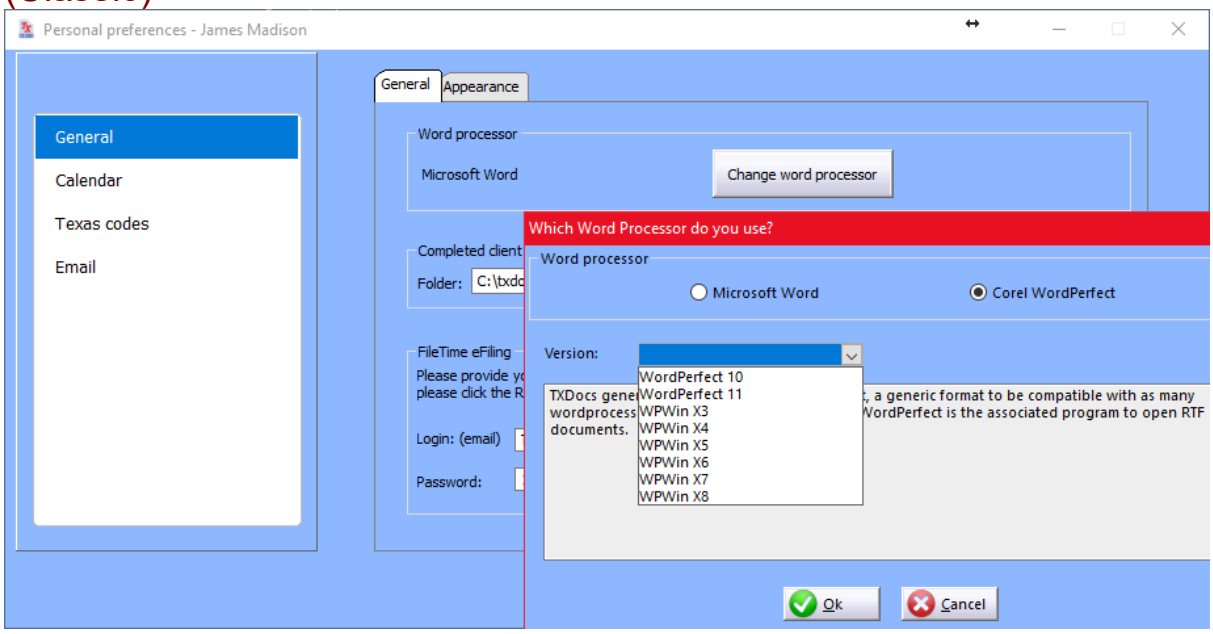
Click on the Check for updates menu option to tell TXdocs to check for updates NOW



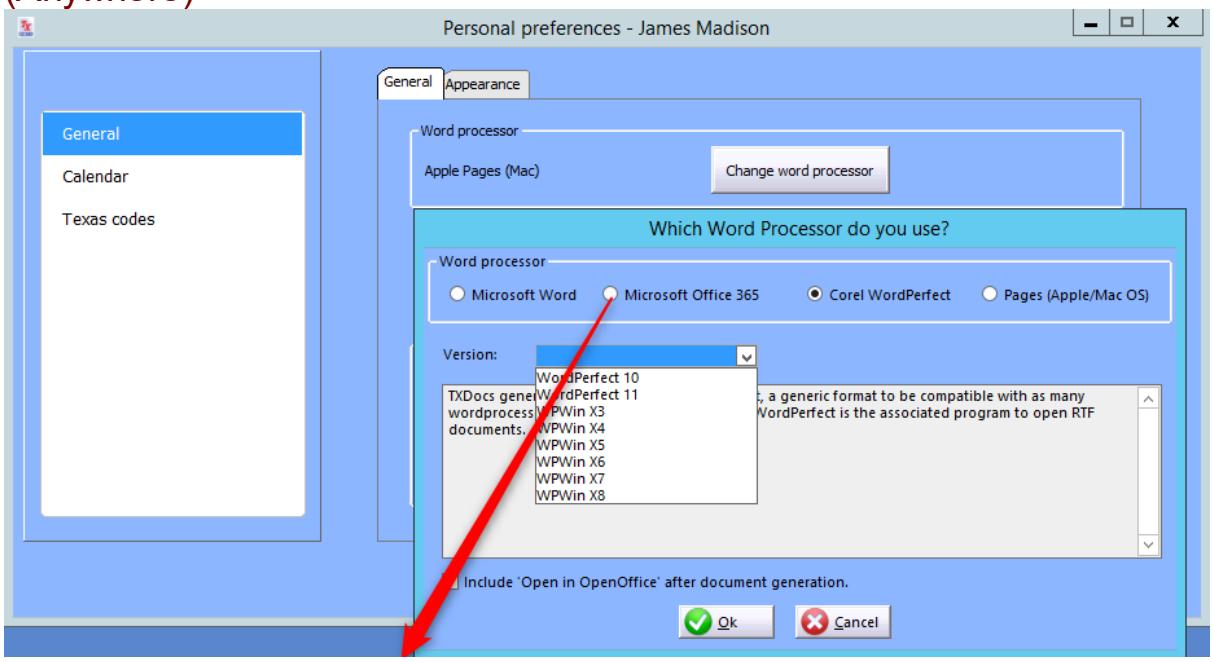
Setting up Personal Preferences

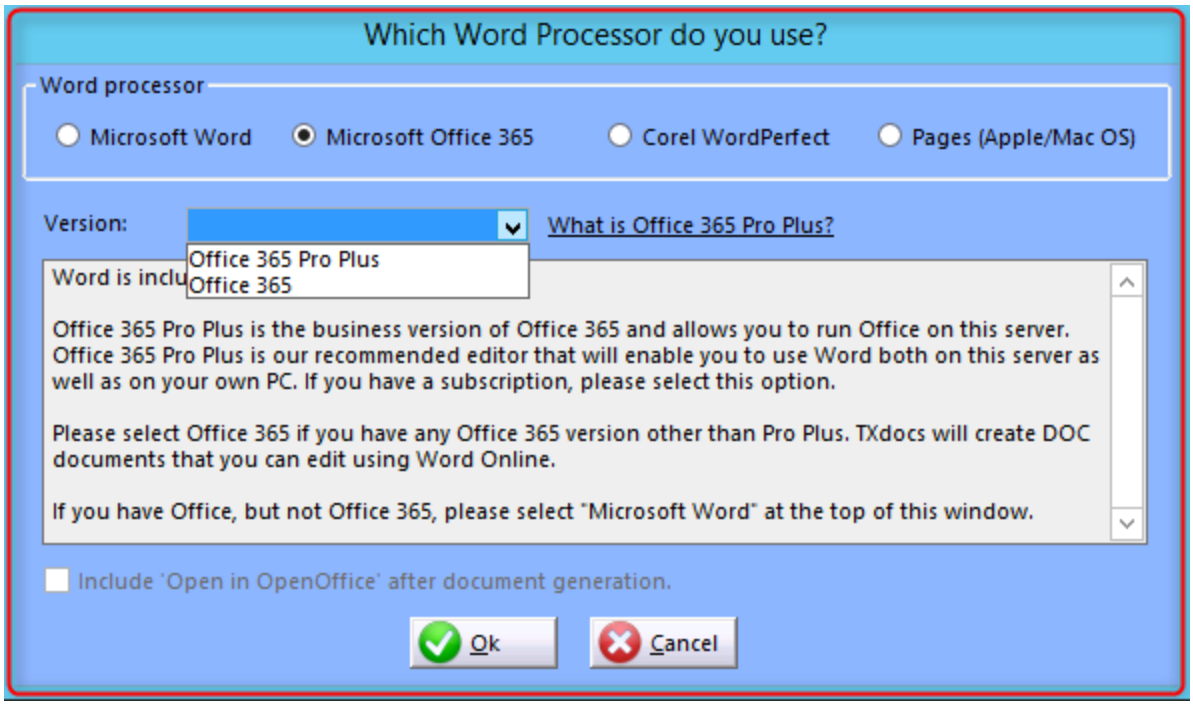
3 Setting up Personal Preferences

(Classic)



(Anywhere)





Word processor - TXdocs works with both Word and Word Perfect. If you select Word Perfect, also need to select the version you use. Your completed documents will automatically be sent to the word processor that is registered with Windows for editing .rtf formatted documents. But, the word processor you select will make a difference in some of the document assembly processes. So, it you have Word Perfect selected here, but Windows opens your assembled .rtf documents in Word, the completed document will have formatting and numbering issues.

(Anywhere) If you choose Office 365, the only subscriptions that are compatible with TXdocs are the base Office 365 subscription and Office 365 Pro Plus.

(Classic only) Completed client documents folder - If you select a Client/Case when you begin assembling documents, TXdocs saves the completed documents in that case's folder. The folder that you enter in this window is the main folder for saving your completed documents. When you add a client to TXdocs, it creates a sub folder using the client's name. And then, when you add a case for that client, TXdocs creates a sub folder for that case. For example, if your completed documents folder is "C:\TXdocs\Client Docs", when you add a case for

"John Doe" with a case description of "Divorce", your completed documents will be saved in "C:\TXdocs\Client Docs\Doe John\Divorce'.

Use TXdocs PDF Viewer - check this box if you do not already have a pdf viewer installed in your computer. Your assembled pdf documents will be displayed in this viewer.

TXDocs tools

4 TXDocs tools

4.1 Family Law Tools

4.1.1 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.

For a detailed description of how the calculations are made using the Texas Family Code, read TXdocs' Guide for Calculating Child Support Obligations. 88

Child Support Calculator

Obligor | Obligee | Jason Aaron - Divorce | Select case

Obligor: Lisa Ann | Party: ○ Petitioner ◉ Respondent

Monthly gross income

4,000.00	Average monthly gross income from employment
0.00	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 or 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))

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 benefits. (Section 154.133)

Children

2 Obligor's Children before the court | 0 Obligor's Children not before the court

Child Support Obligation

$815.71	Monthly support obligation	(25%)	$376.48	Bi-weekly support obligation
$407.85	Semi-monthly support obligation		$188.24	Weekly support obligation

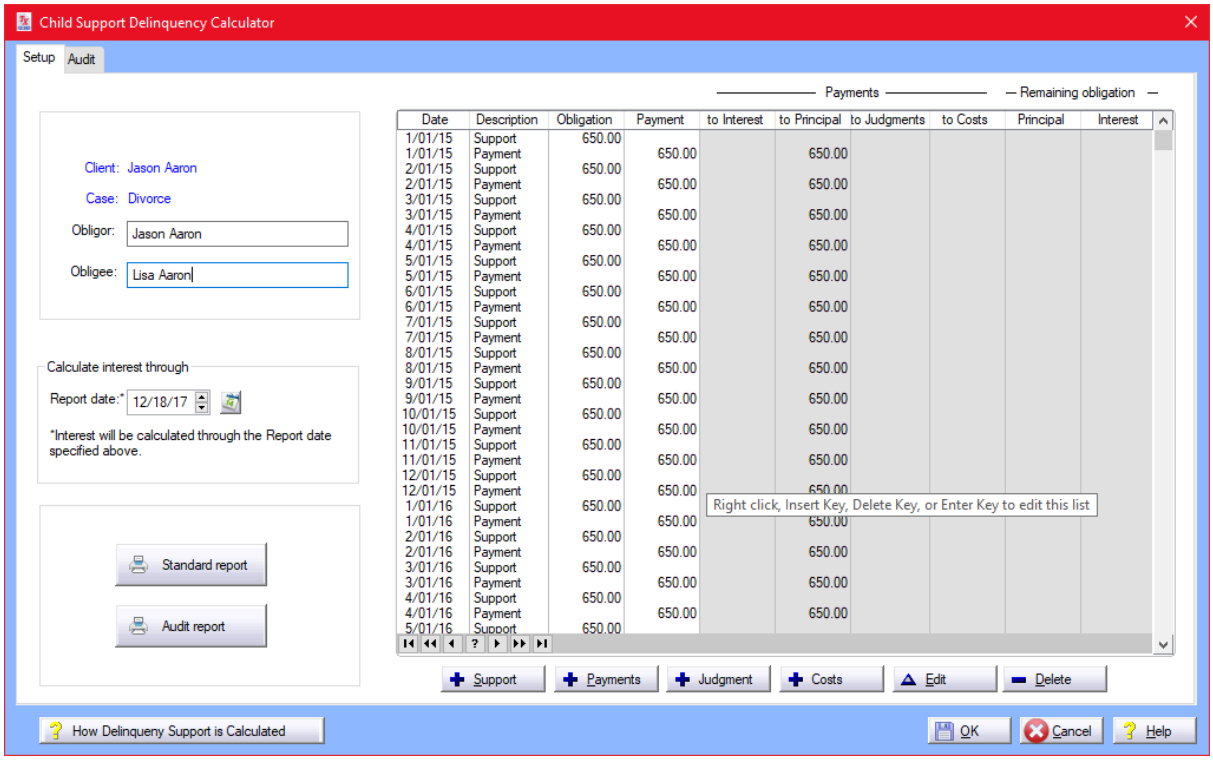
Print | OK | Cancel | Help

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.

4.1.2 Delinquent Child Support Calculator

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.

4.1.3 Property Negotiator

The negotiator lets you create different proposals for dividing assets and debts of the marital estate. All assets and debts, their descriptions, value and ownership are listed in their respective estates: Community, Petitioner's Separate Estate and Respondent's Separate Separate. Assets include every item acquired before and during a marriage - from clothing to private collections (guns, antiquities) to property (vehicles, real estate) to financial (investments, debts, credit cards) to insurance policies.

Retirement Plans/Benefits are listed in a separate panel to accommodate the special division of benefits. Here you can add, edit, or delete plans. You can also change the percentages of plans/benefits in the Estate and Division column field. To adjust a percentage, simply click on the percentage you want to change. Up/Down arrows will appear next the selected percentage. Hold the arrow up or down until the desired number is reached.

Reimbursement claims are also separated. Property Negotiator gives you the ability to include an Award of Reimbursement Claim in a decree. It also provides a tool to "equalize" financial assets by specifying a dollar amount the Equalization Payment panel found on the right side of the estate windows.

If you forgot to add an asset/debt, you can add it in Property Negotiator just as you did in Property Inventory. Refer to Add, Edit, and Delete Assets and Debts for more instructions.

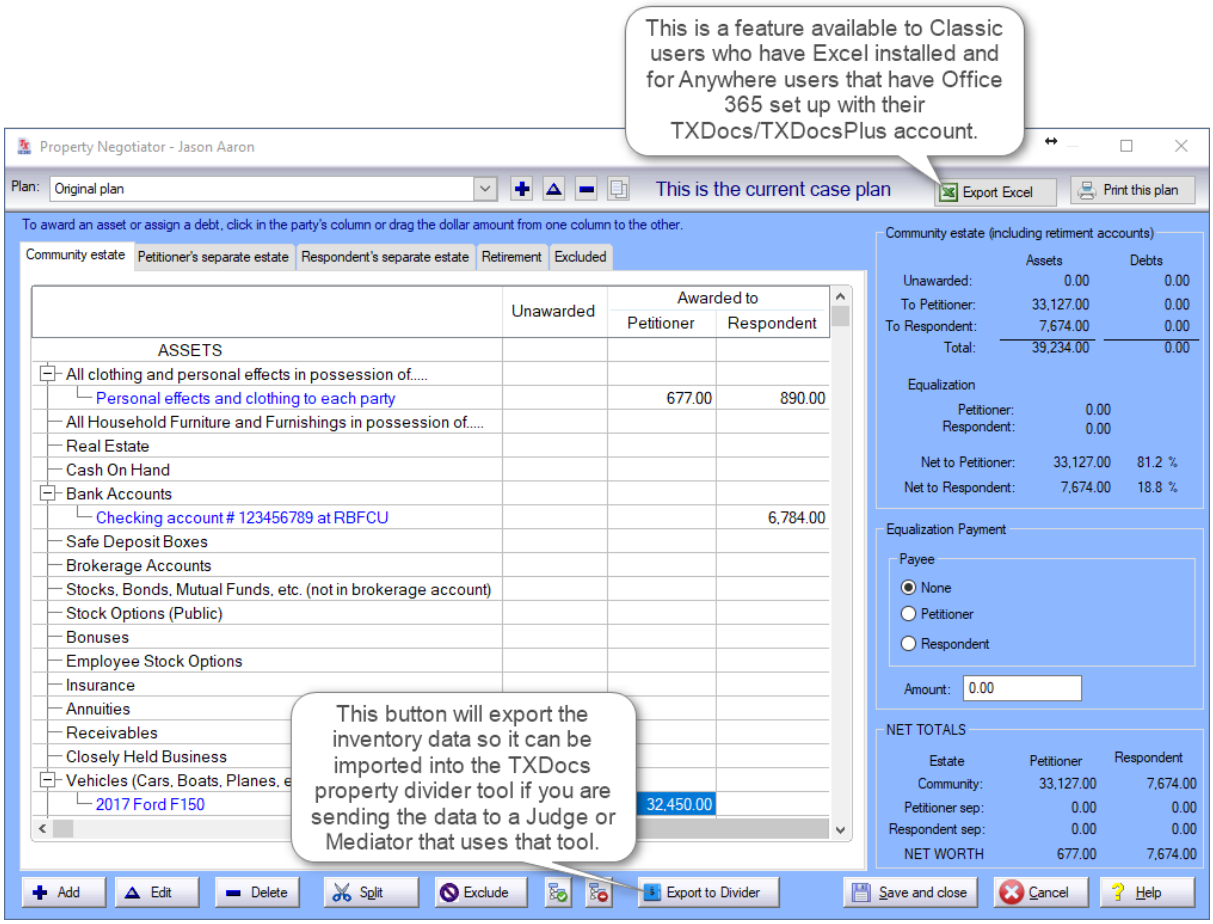
The Property Negotiator lets you assign or award a debt to the petitioner or respondent. Unawarded items will not be addressed by the decree. It even lets you take an item off the negotiating table by Excluding it.

To Award an Asset or Assign a Debt

There are two ways to perform this task.

1. In the Awarded To columns: Click on the respective party in the Awarded To columns and drag the value (dollar amount) of an item from one column to the other (i.e. Respondent to Petitioner).

2. In Edit mode: Click to Edit an asset or debt to bring up the Editing Information form. In the form, locate the Estate radio buttons and select the estate of choice.



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

4.1.4 The Redactor

The Redactor is available under Tools on the main menu. 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 questions in the case in which the answer contains sensitive information.

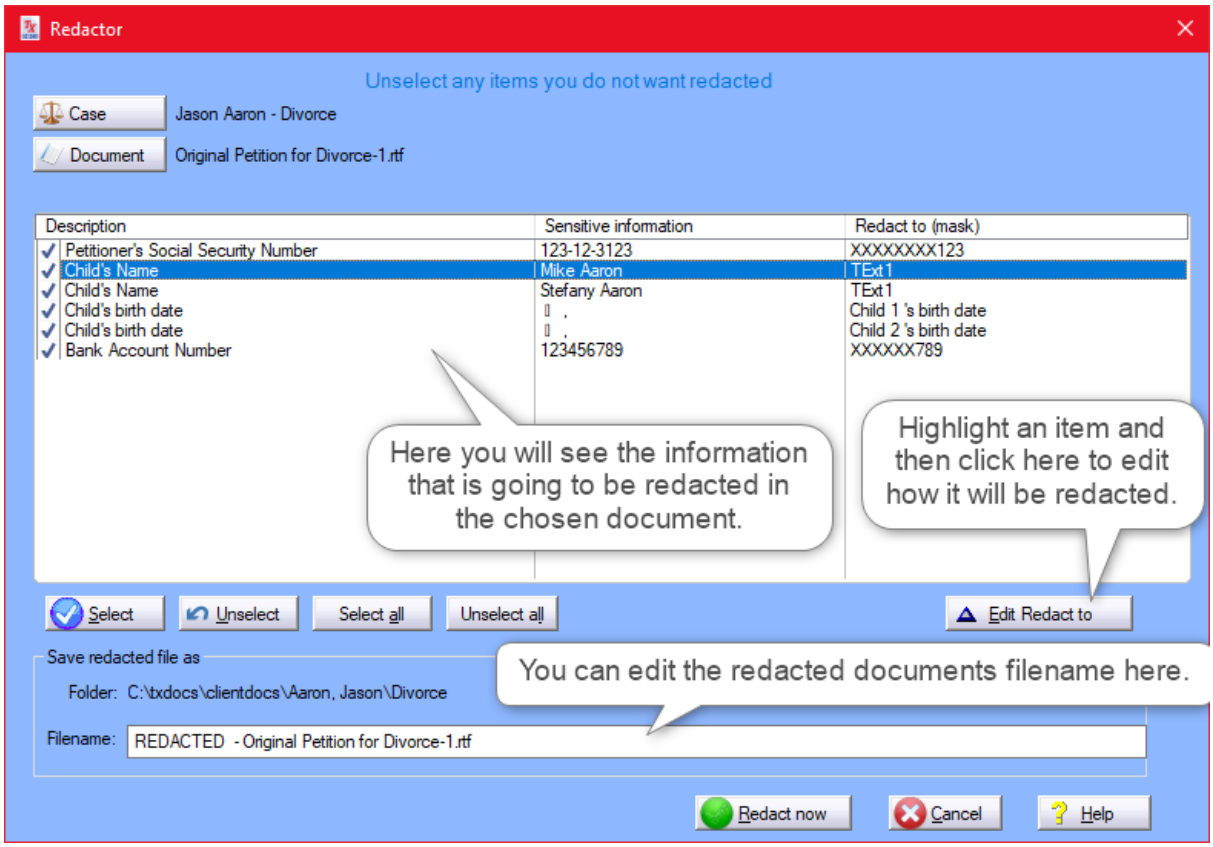
Select/Unselect/Select all/Unselect all buttons - initially, all of the listed information will be selected for redaction. If, for any reason, you do not want Redactor to redact a particular answer, you can unselect it.

Questions selected for redaction have a green checkmark in the left column.

Edit Redact to button - Click this button to change the mask redactor will use to hide the sensitive information. You can also double click the answer 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.

Go - click the Go button to perform the redaction.

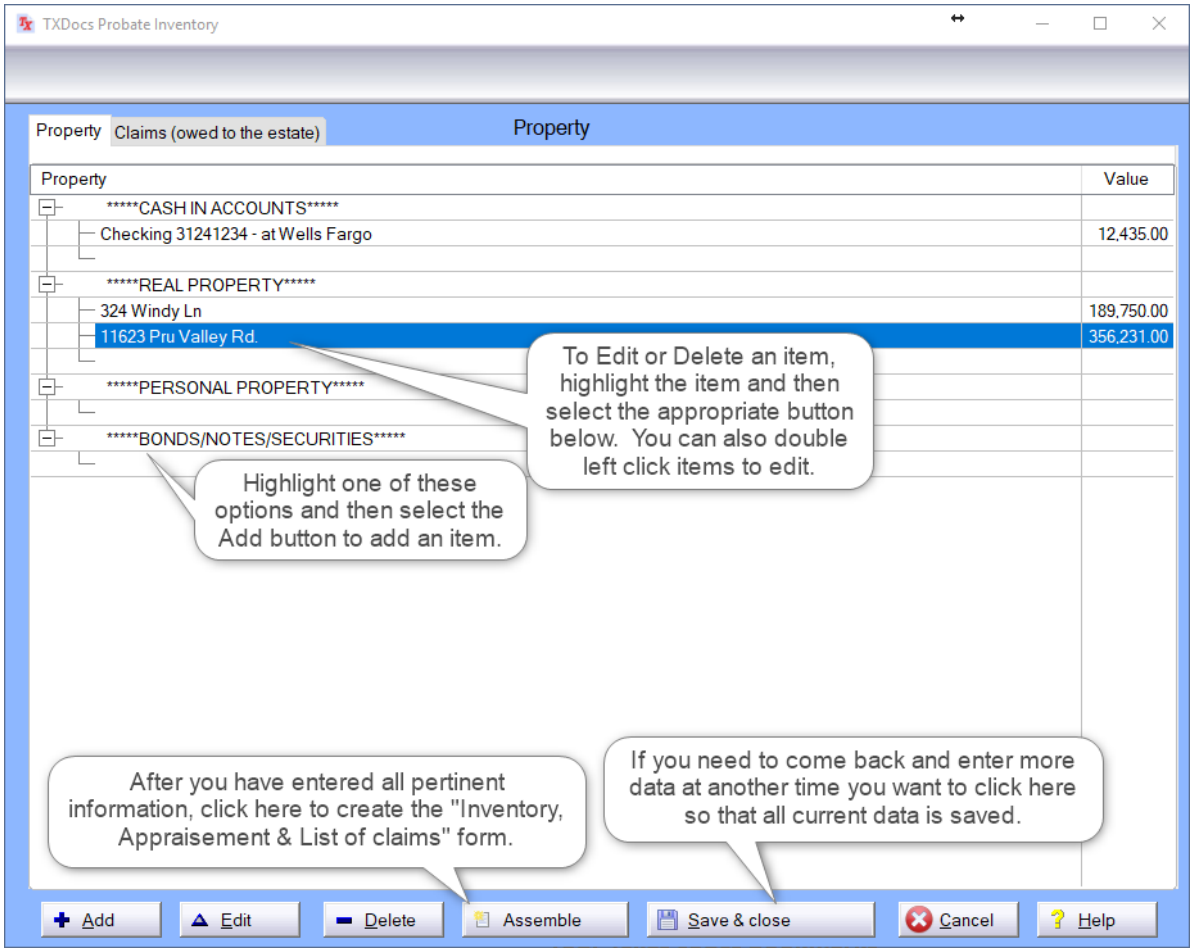


4.2 Probate Tools

4.2.1 Probate Inventory

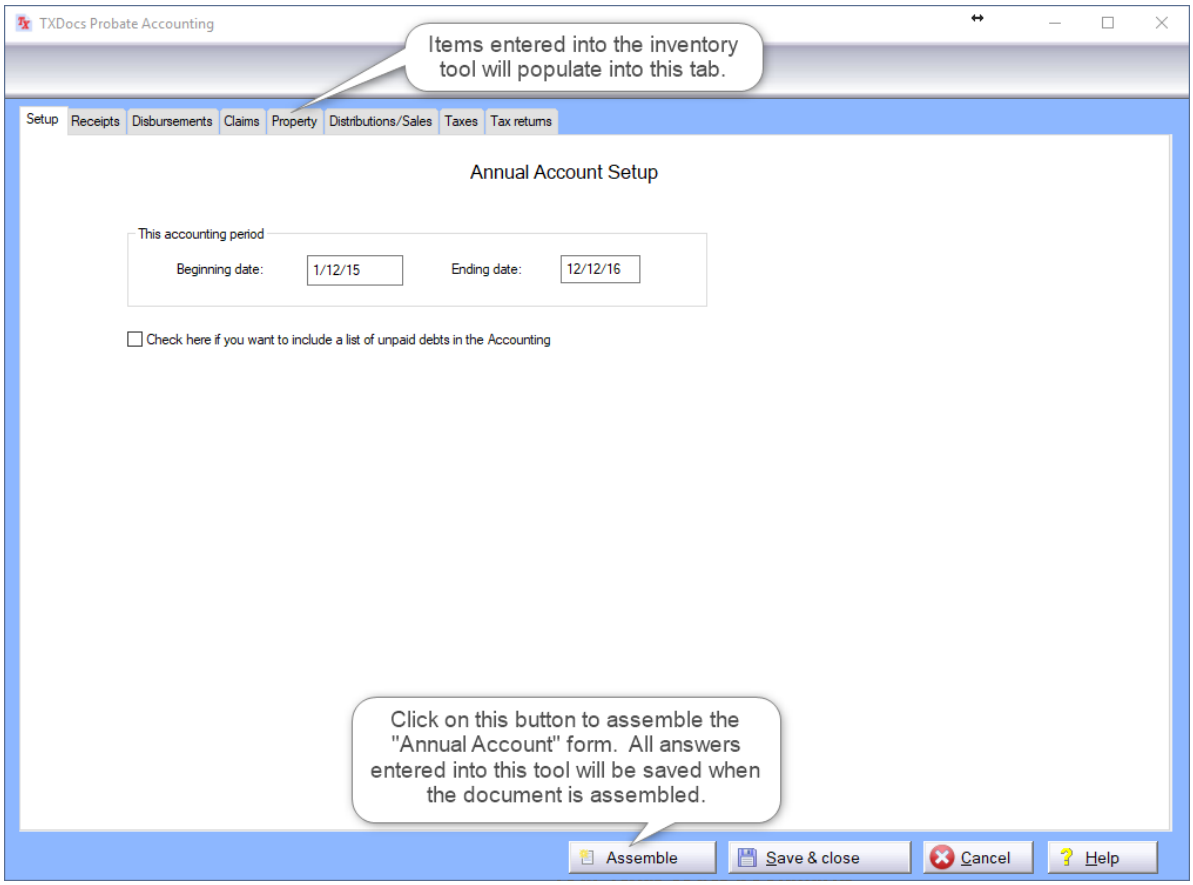
This is where you will begin entering in property and claims for your Probate case. The items that you enter into the inventory tool will be

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.

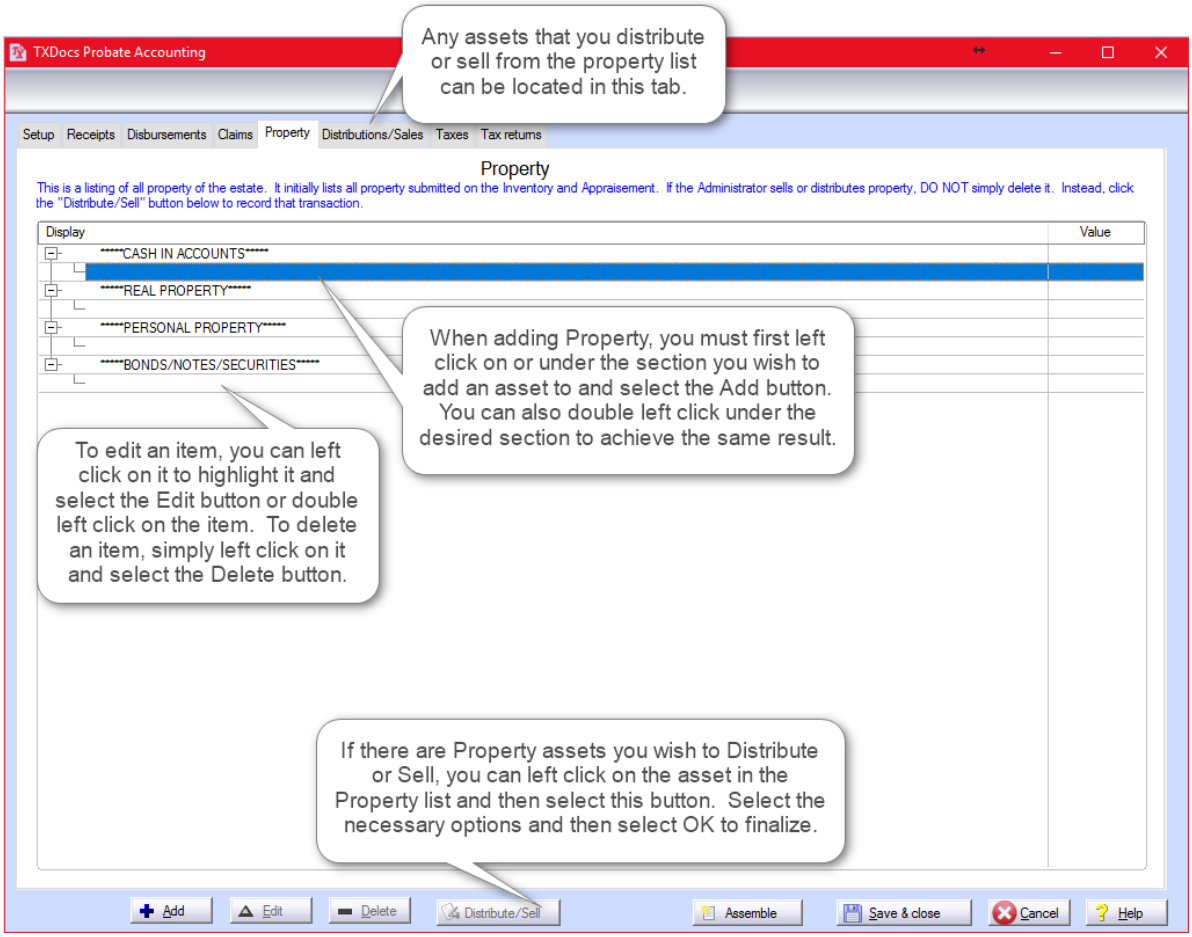


4.2.2 Probate Accounting

This tool will help you keep track of the necessary items for your probate case. Click on the different tabs to add any information that applies. Any items that you may have entered in the Probate Inventory tool will populate in the Property tab.

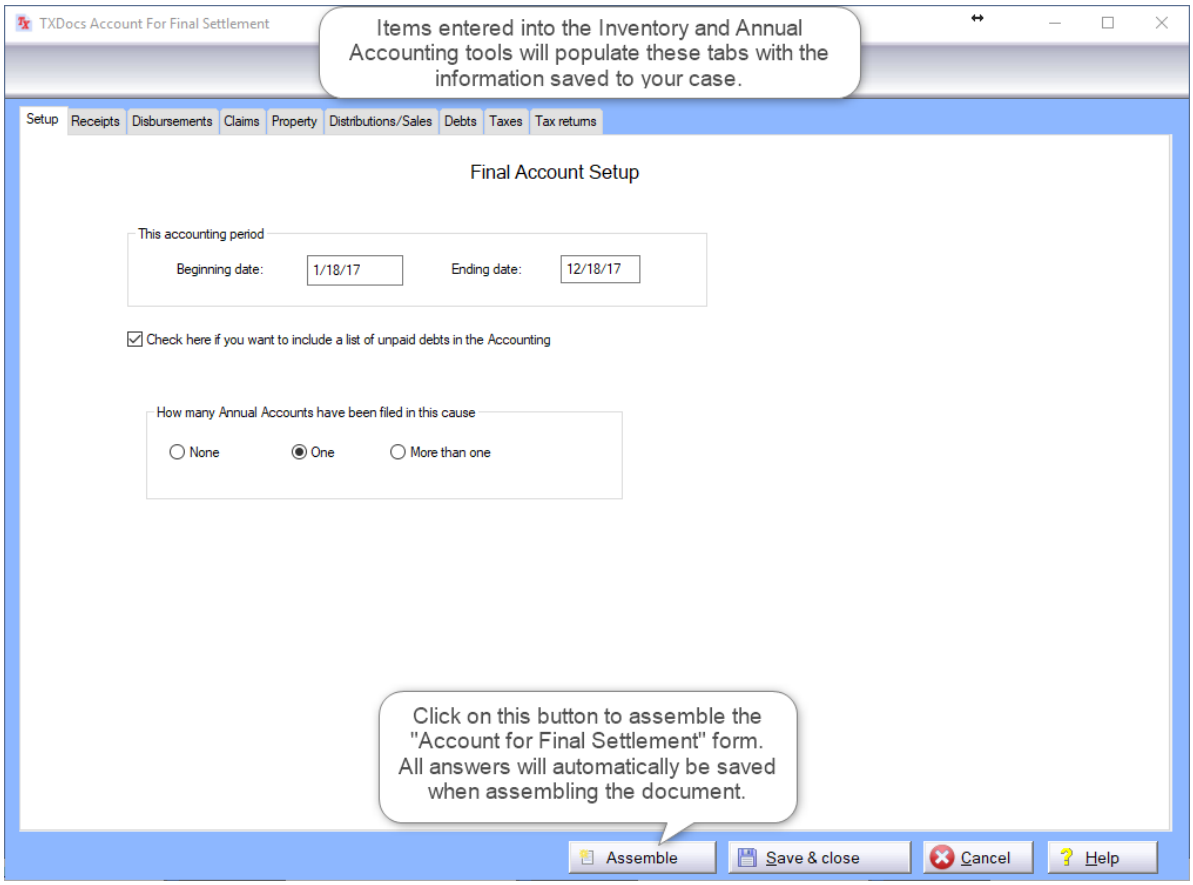


Adding Property assets

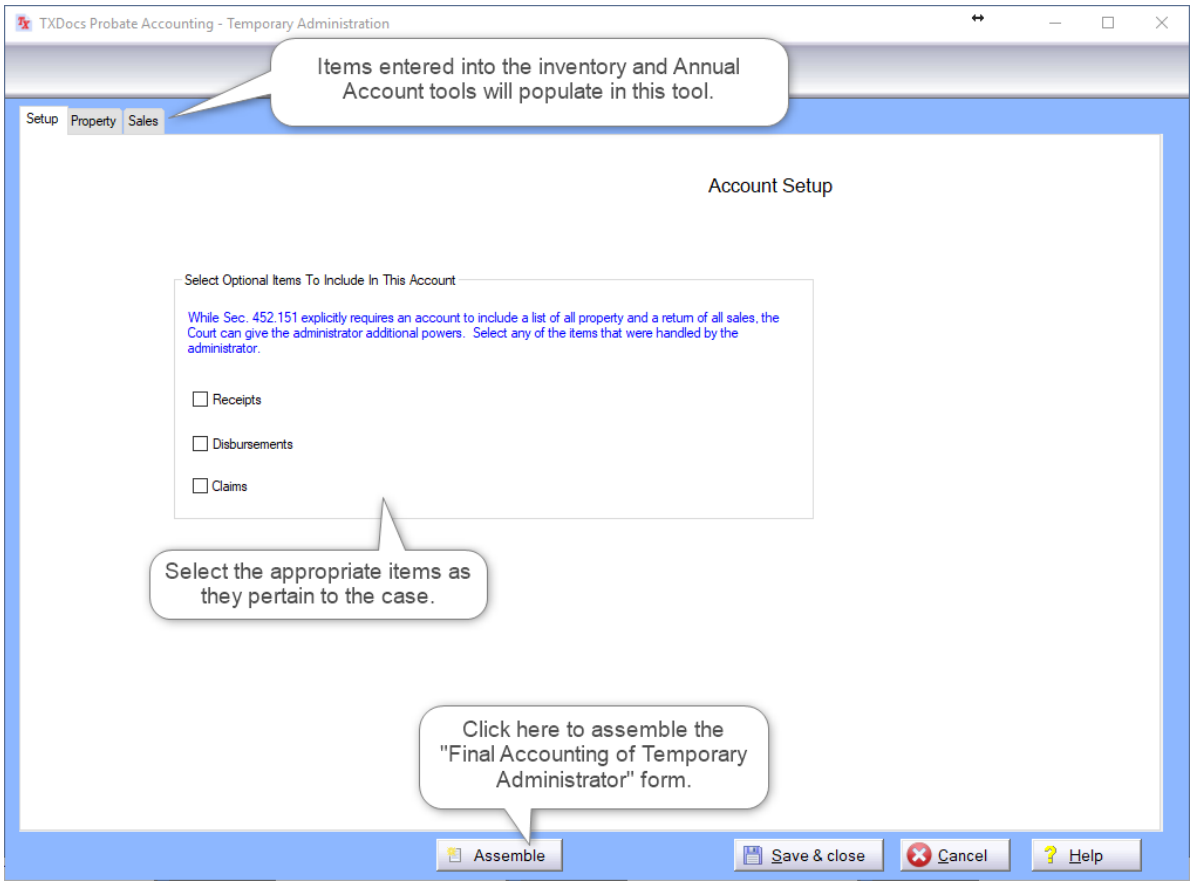


4.2.3 Probate Final Account

This tool will help you keep track of the necessary items to finalize your probate case. Any items that you may have entered in the Probate Inventory tool or Probate Annual Account tool will populate in the tabs accordingly.



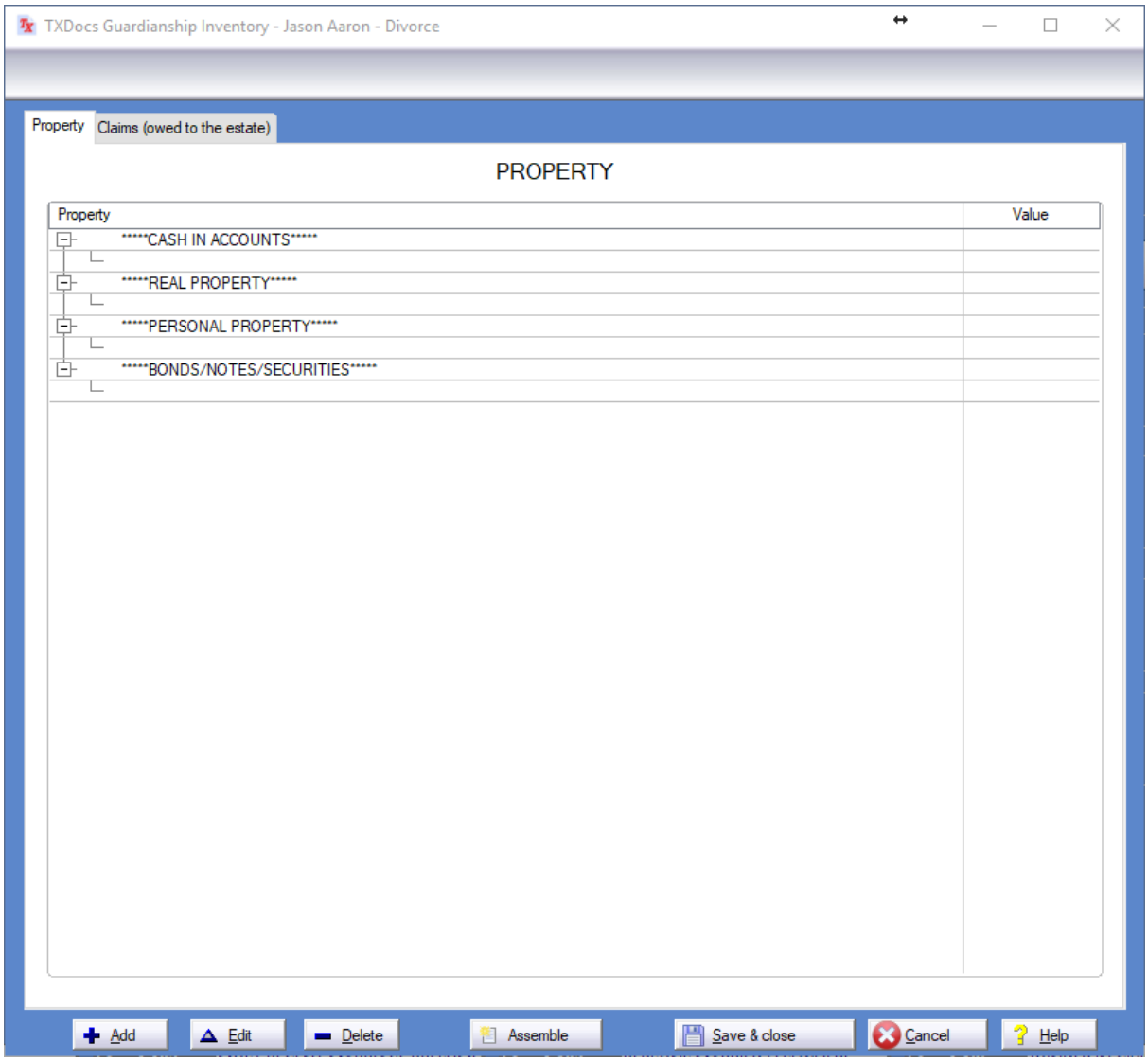
4.2.4 Probate Final Account -Temporary Administrator



4.3 Guardianship

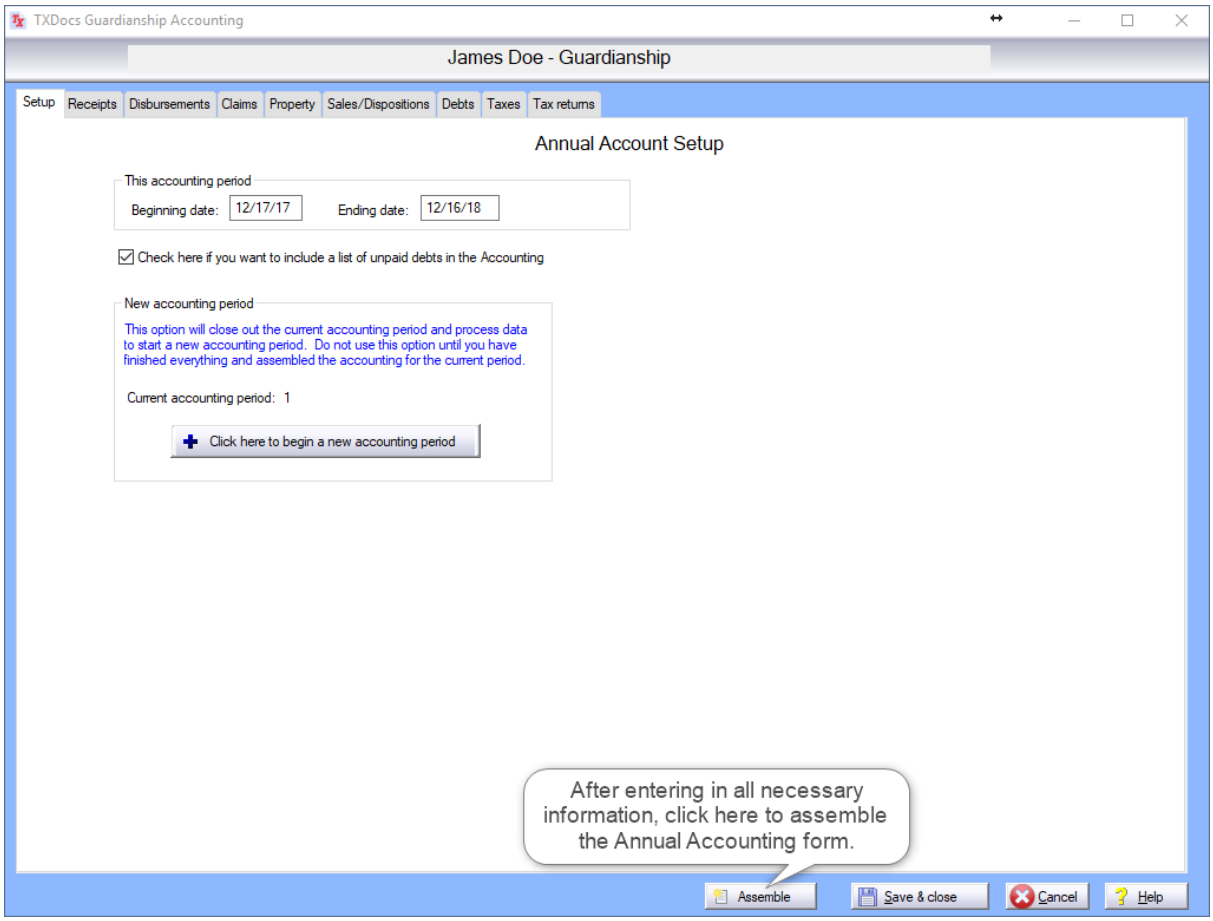
4.3.1 Guardianship - Inventory

Enter all necessary information under their respective headings. You can right click on a section to add an item or use the buttons at the bottom of the window to **Add, Edit** or **Delete** items. Select the **Assemble** button to assemble an Inventory, Appraisement and list of Claims.



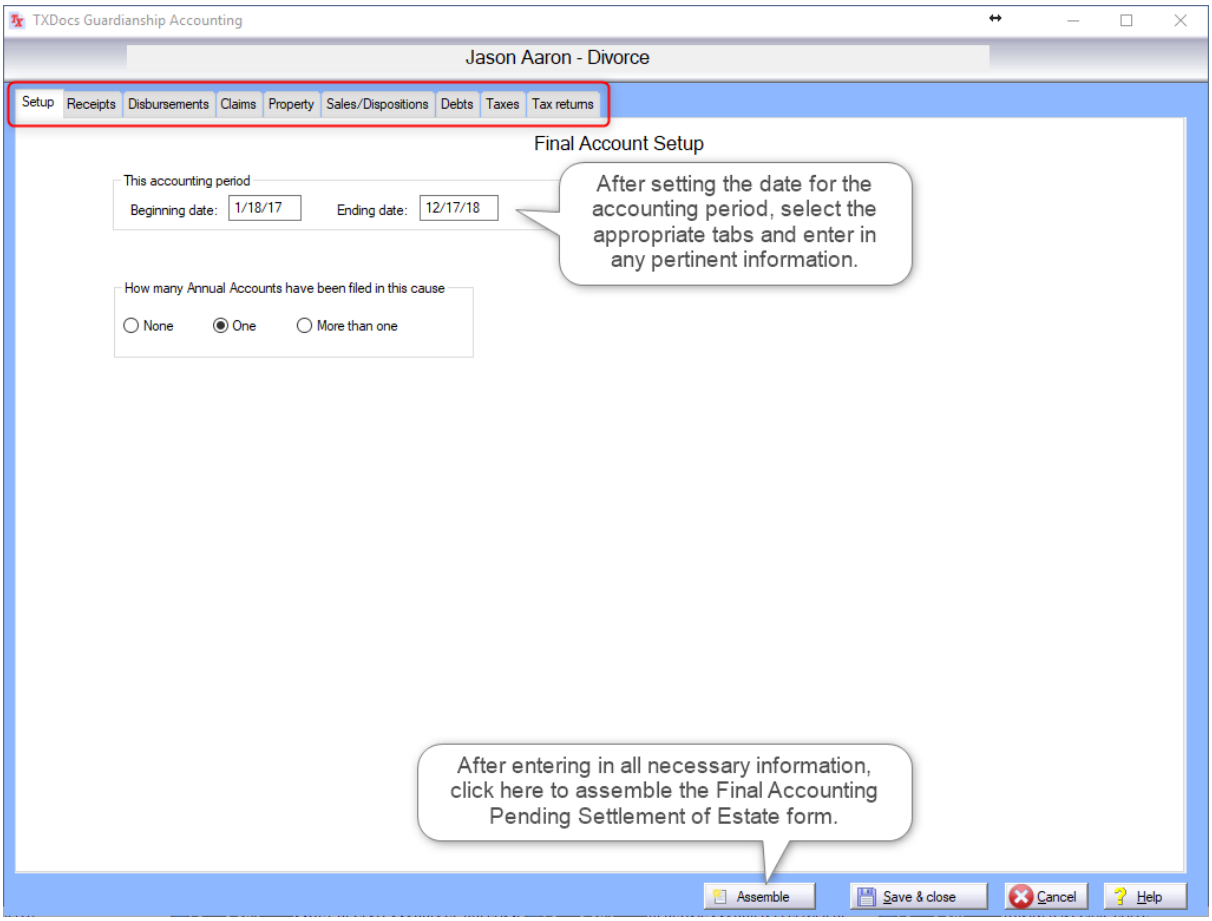
4.3.2 Guardianship - Annual Account

Use the tabs at the top to navigate the different sections to enter all information that applies to your case and then select **Save and Close** when you are done. Any information entered into the other guardianship tools will populate in this tool once you have selected the appropriate case. Select the **Assemble** button to assemble the Annual Accounting form.



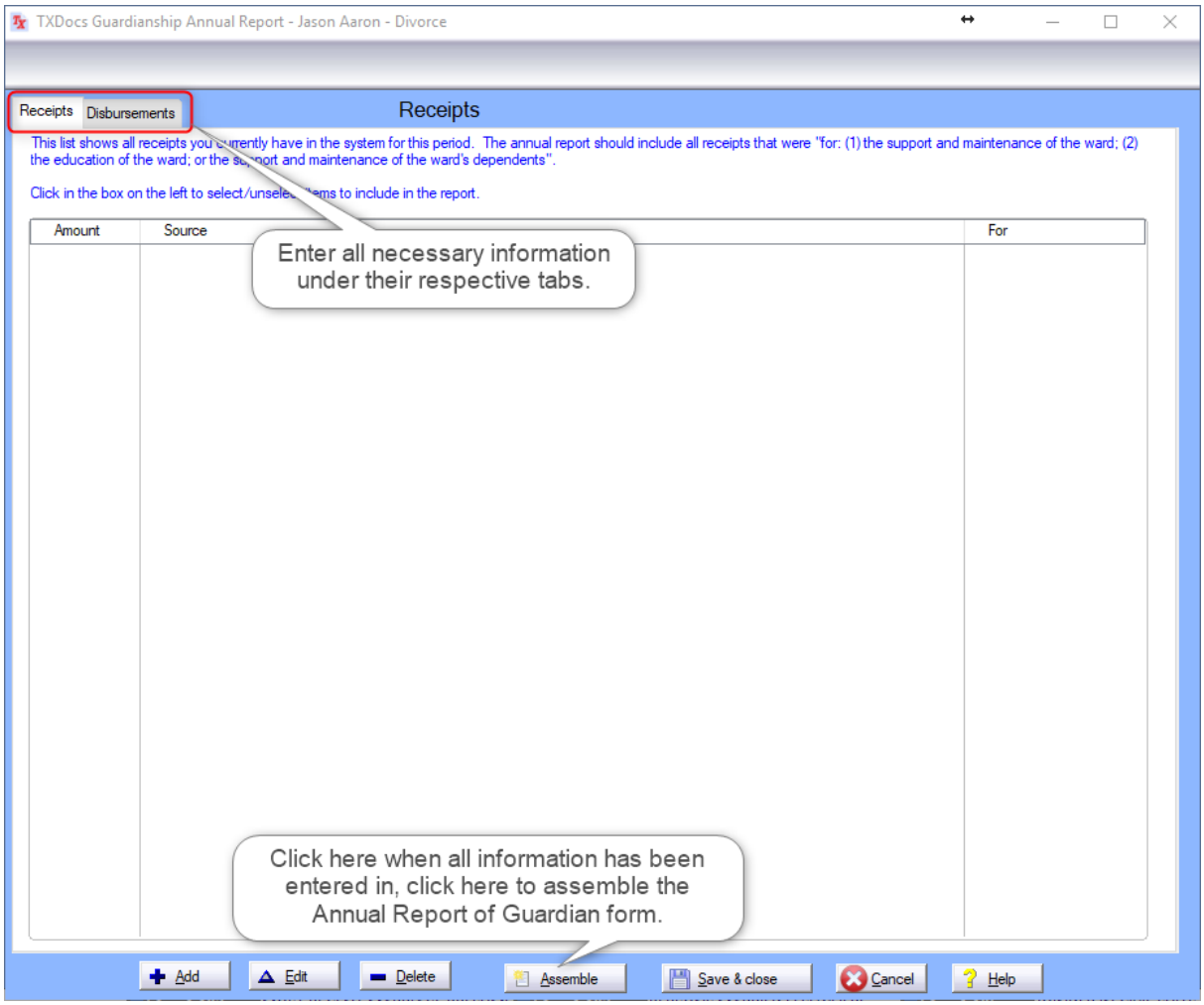
4.3.3 Guardianship - Account for Final settlement

Use the tabs at the top to navigate the different sections to enter all information that applies to your case and then select **Save and Close** when you are done. Any information entered into the other guardianship tools will populate in this tool once you have selected the appropriate case. Select the **Assemble** button to assemble the Final Account pending Settlement of Estate document.



4.3.4 Guardianship - Annual Report

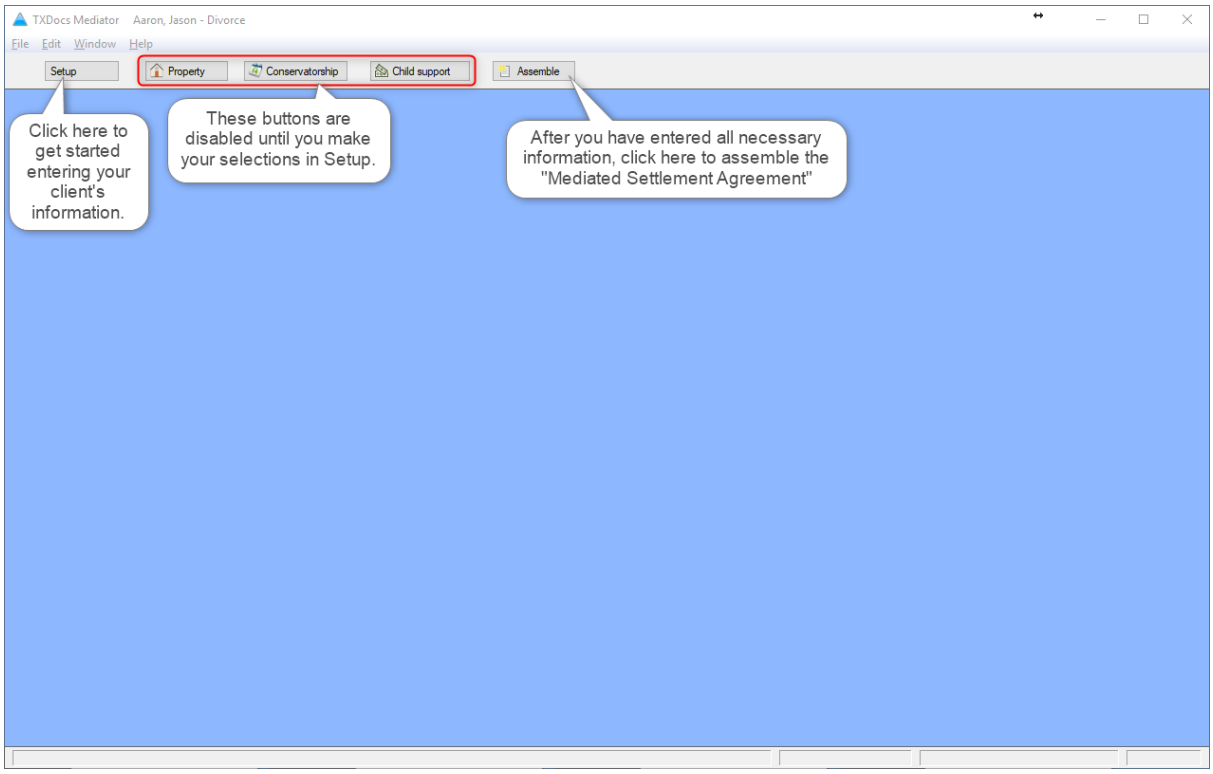
Enter all Reciepts and Reimbursements that apply and then you can select **Save and Close** when you are done. Select the **Assemble** button to assemble the Annual Report of Guardian document.



4.4 Mediator

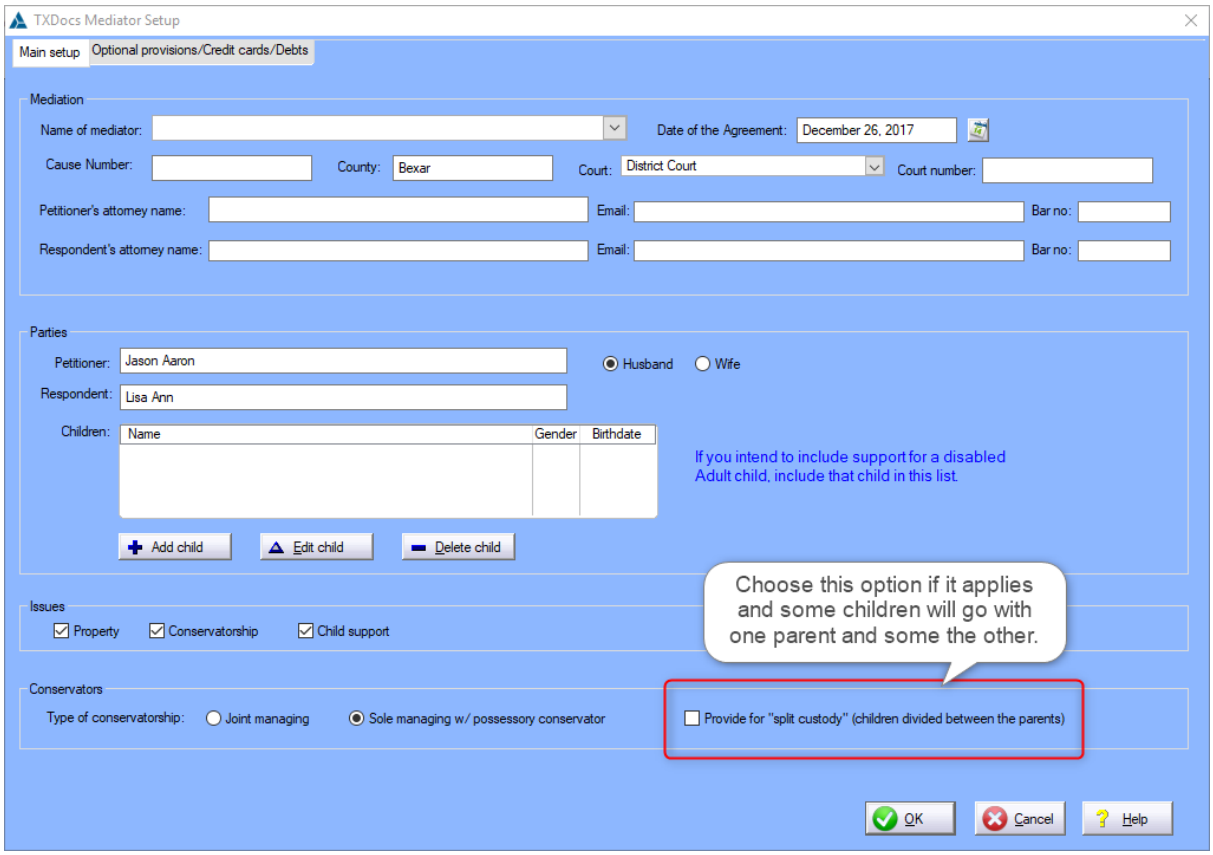
4.4.1 Mediator Main

To get started go to **Tools->Mediator**. You will need to enter the **Setup** to enter any necessary infromation for your case and where you will also select whether**; Property, Conservatorship and Child Support** are areas to be included in your clients case.

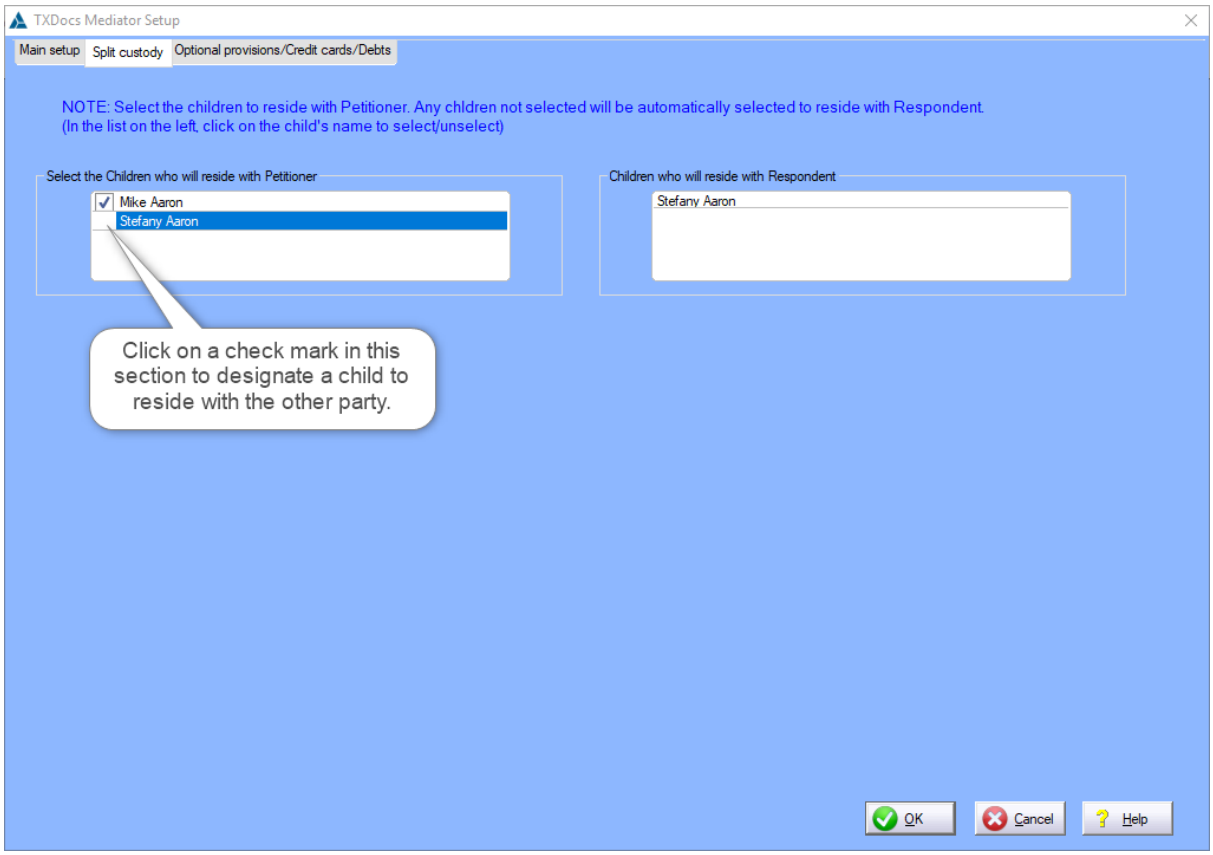


4.4.2 Mediator Setup

To get started with the Medaitor tool you'll access the **Setup** menu and enter information that pertains to your case. In the image below you will also see the **Issues** section where you will make selections for other elements of the Mediator tool to be included for this case.

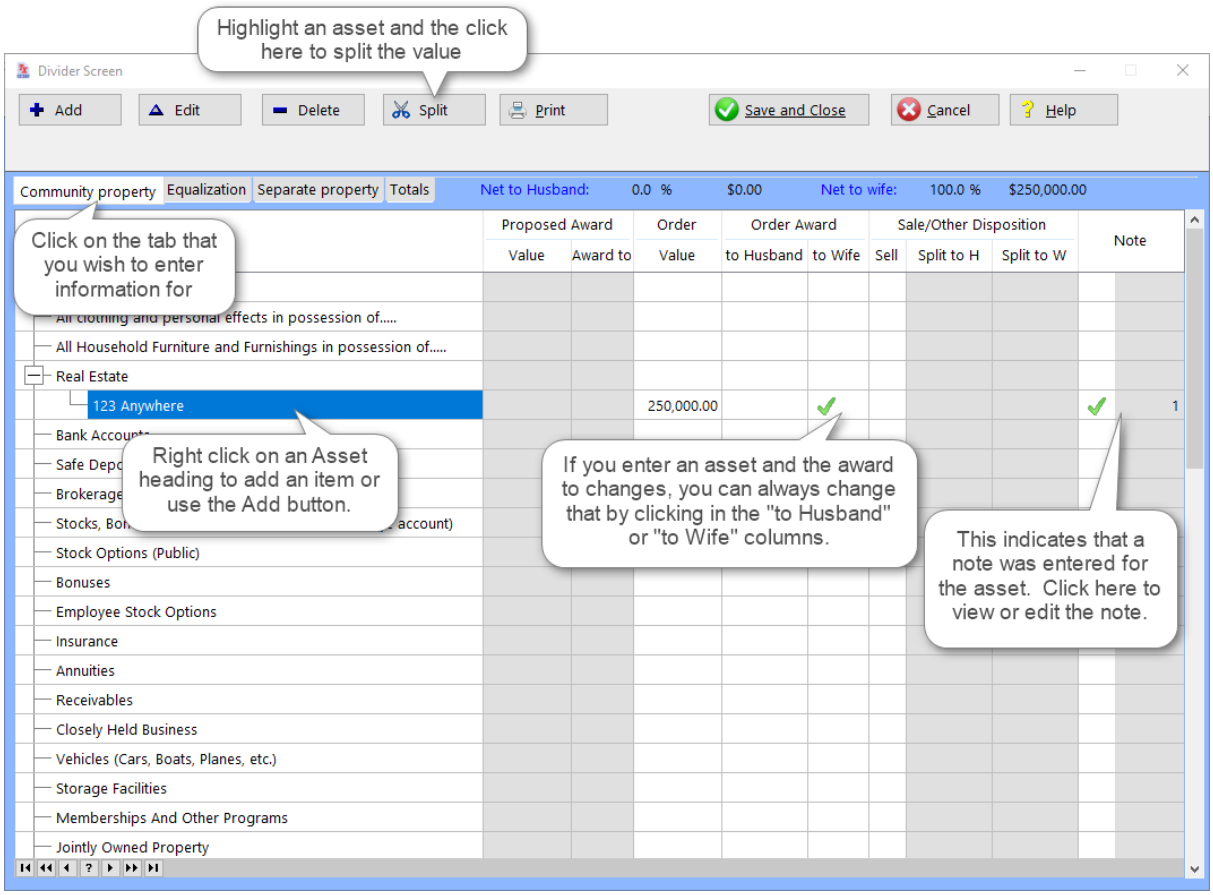


In the **Setup** window, if you selected **Provide for "split custody" (children divided between the parents)** then refer to the image below for designating children to the Petitioner and Respondent.



4.4.3 Mediator Property

This is where you will enter the property as it pertains to your case.



4.4.4 Mediator Child Support

Here you will enter in the Child Support information for your case as well as any Optional provisions and Medical support.

Child Support Provisions

Support obligation | Optional provisions | Medical support

Obligor: Obligee:

Payments

Frequency of support payments: Monthly Semi-monthly Weekly

Support per month: 1,200.00 Child support calculator

Click here to access the Child Support Calculator.

Day of month for each monthly payment: 12th

Fill in the stepdown amount of child support as each child emancipates.

Support	# of children
1,200.00	1 child currently

Use the "Child support calculator" button above to automatically calculate the stepdown amounts. Or, to edit the step down amounts manually, double click on the amount you want to change. After you make the change, press Enter to complete the edit. NOTE: You cannot change the amouint in the first row. That is the current amount that is owed before the step down. You can change the amount currently owed in the payment field above.

Disabled child needing continued support

none minor disabled child adult disabled child Name:

Variance from Child Support Guidelines

Include a statement that he parties agree to an amount of child support that varies from the guidelines

Net resources of obligor: 4439.75 Calculate net resources

Net resources of obligee: 0

Percentage applied to obligor's resources:

Suspend income withholding order

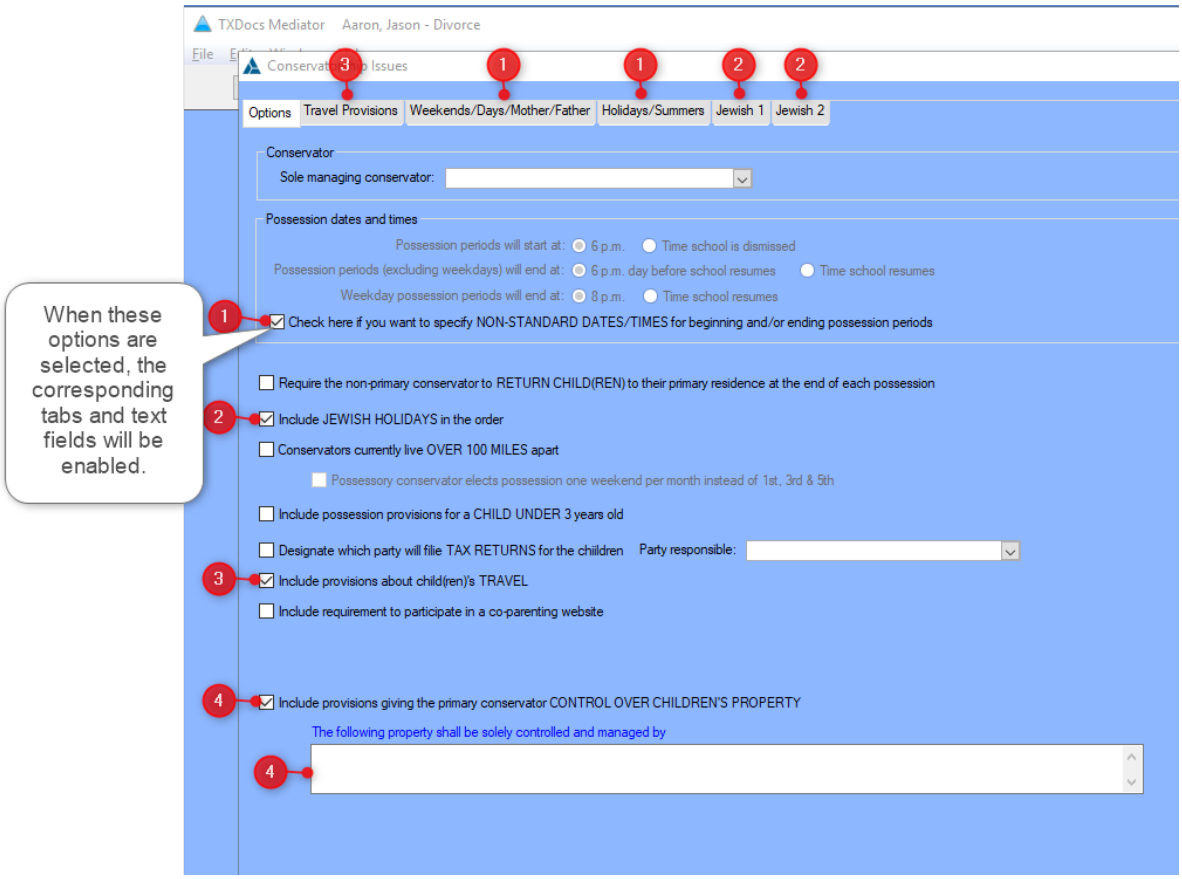
Require obligor to maintain life insurance Amount: 0.00

Require obligor to post a bond to secure compliance Amount: 0.00

OK Cancel

4.4.5 Mediator Conservatorship

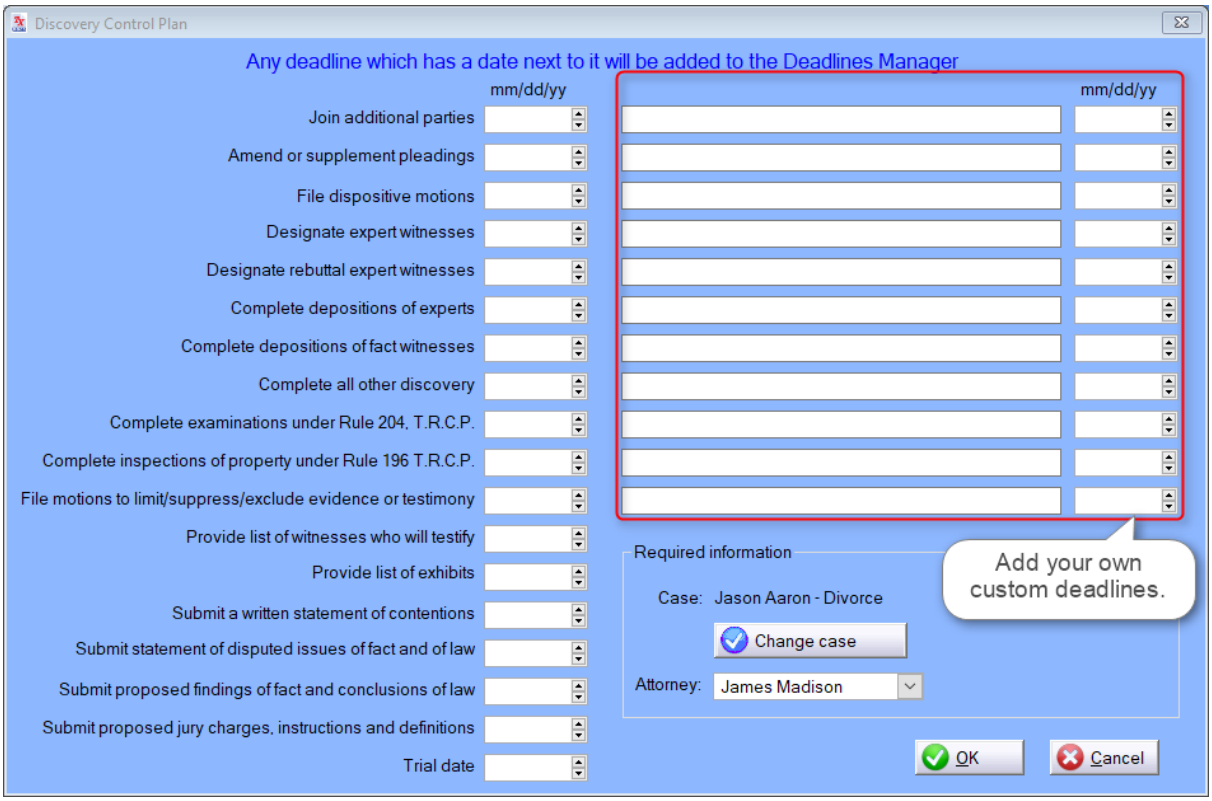
Select all options that apply, there are some options seen in the image below that must be selected to enable additional options for this section of the mediator.



4.5 Deadline Manager

4.5.1 Discovery Control Plan

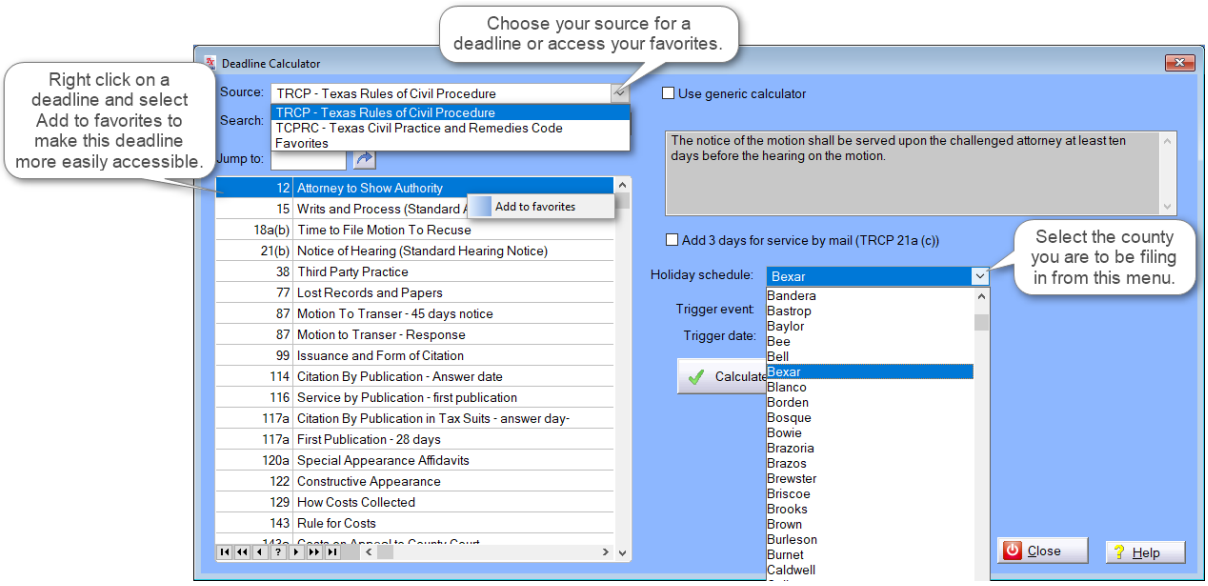
The Discovery Control Plan will allow you to create multiple deadlines for a client at one time as well as the ability to create any custom deadlines for that case you may need to add. Selecting a Case and Attorney are necessary to save your plan to the Deadlines Manager. These plans will now be saved to your client's case answers if you wish to assemble the plan at a later date.



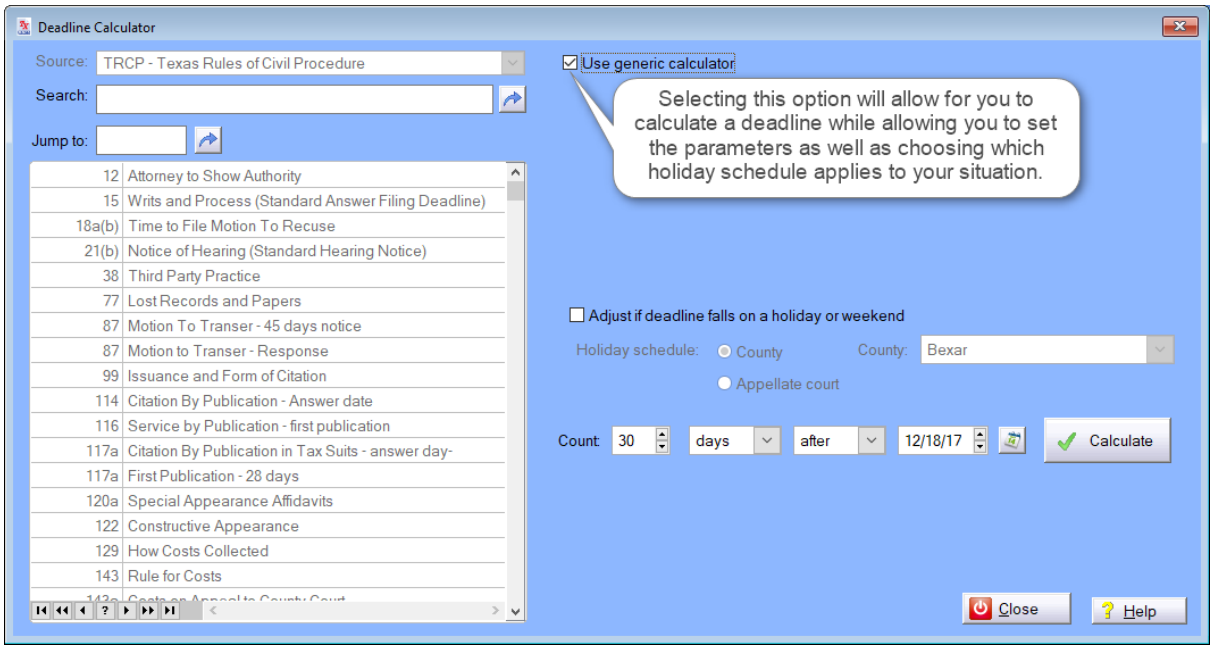
4.6 Deadline Calculator

4.6.1 Deadline Calculator

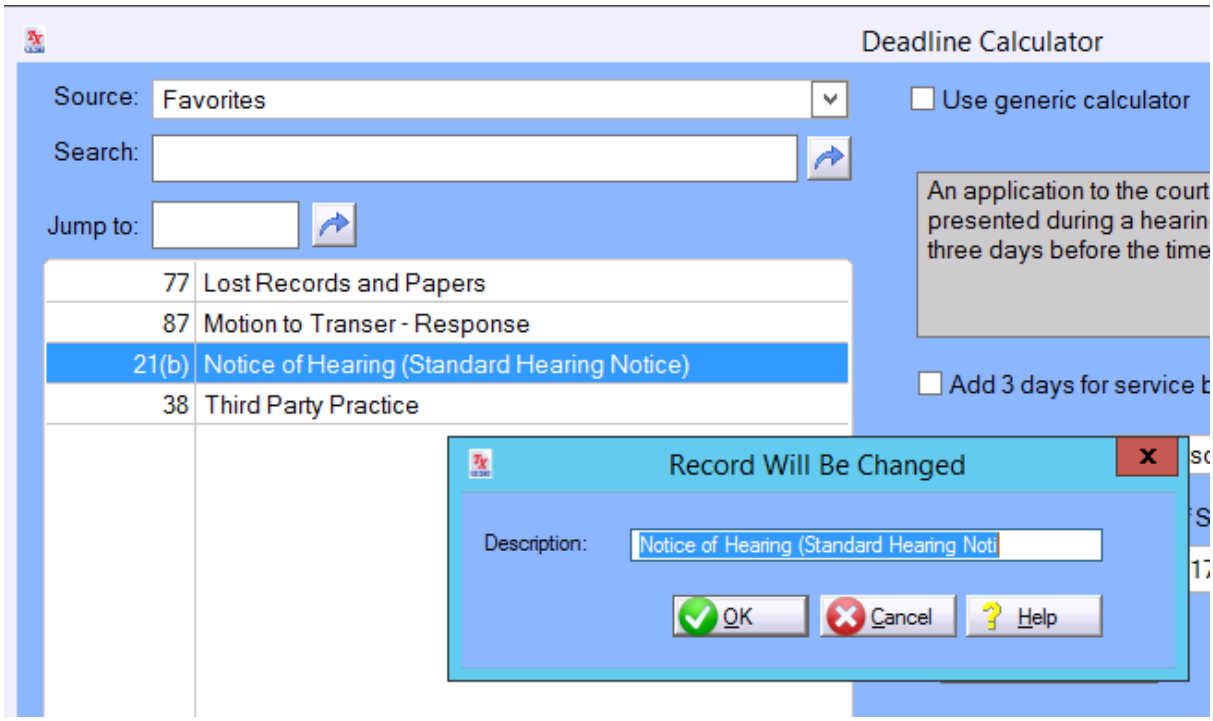
The Deadline calculator will allow you to determine the Deadlines for the filing of documents. You will be able to choose the County which you are filing and we have also taken into account each County's holiday schedule. You can also add deadlines to your Favorites for easy access (to remove an item from Favorites, right click on the item in your favorites list and choose **Delete from favorites** or **Edit favorite description**.



The "Use generic calculator" option will allow you to calculate a date without selecting a deadline.

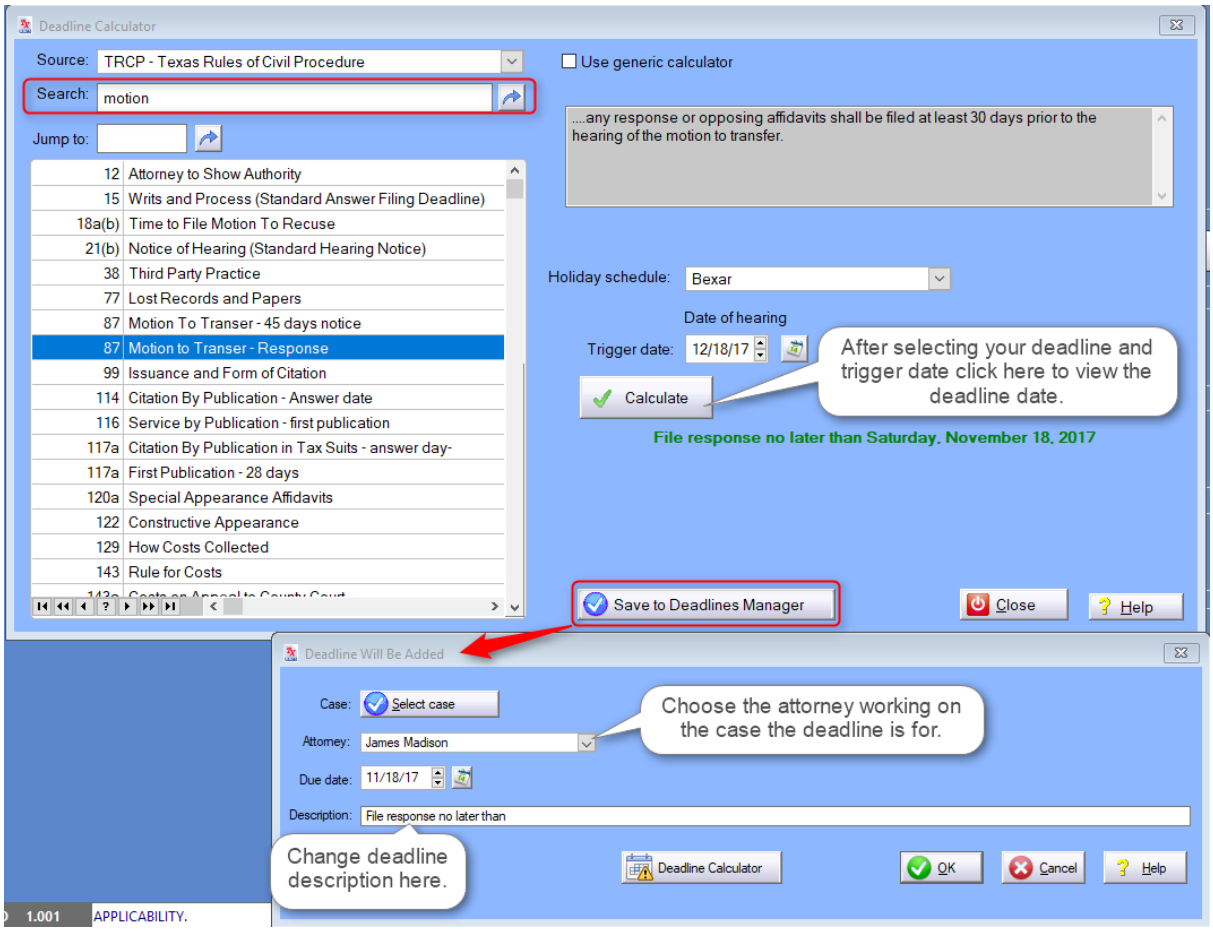


From you Favorites list you can right click on a deadline and select **Edit favorite selection** to change the description.



4.6.2 Deadline Calculator Search

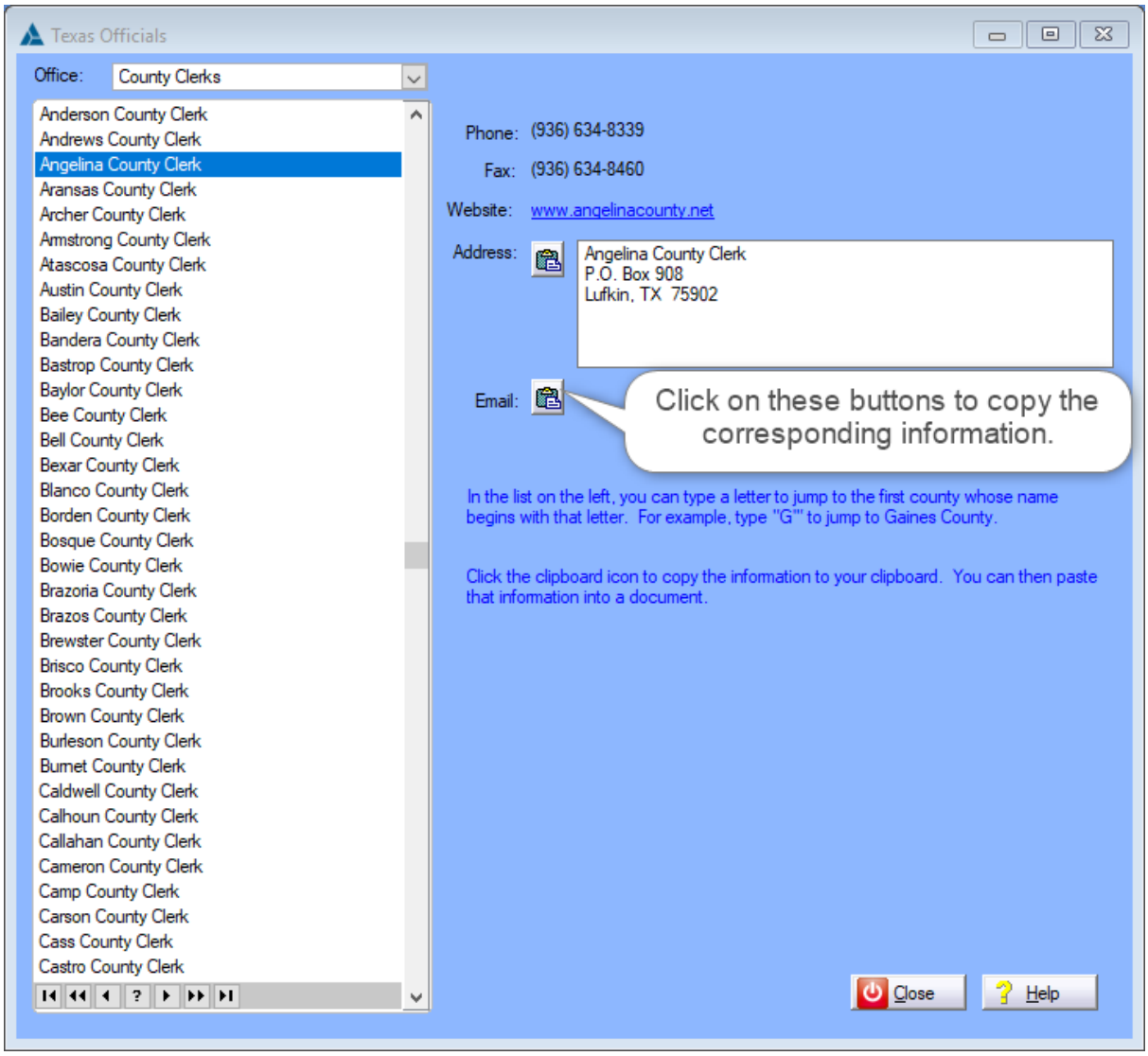
Search for deadlines using keywords or section numbers, you can view the details for the deadline in the window below the "**Use generic calculator**" option. After selecting the deadline, county and trigger date you will click the "**Calculate button**" and a notification will pop up with the deadline date. You will also notice the "**Save to Deadlines Manager**" button that will appear at the bottom of the Deadline Calculator window. When you click this option it will open a "**Deadline Will Be Added**" window where you can select the case the deadline pertains to (not required) and then choose the attorney at your firm who is working the case. You will also be able to change the description however you need to and then select **OK** to save the deadline to the Deadline Manager.



4.7 Officials

4.7.1 Officials

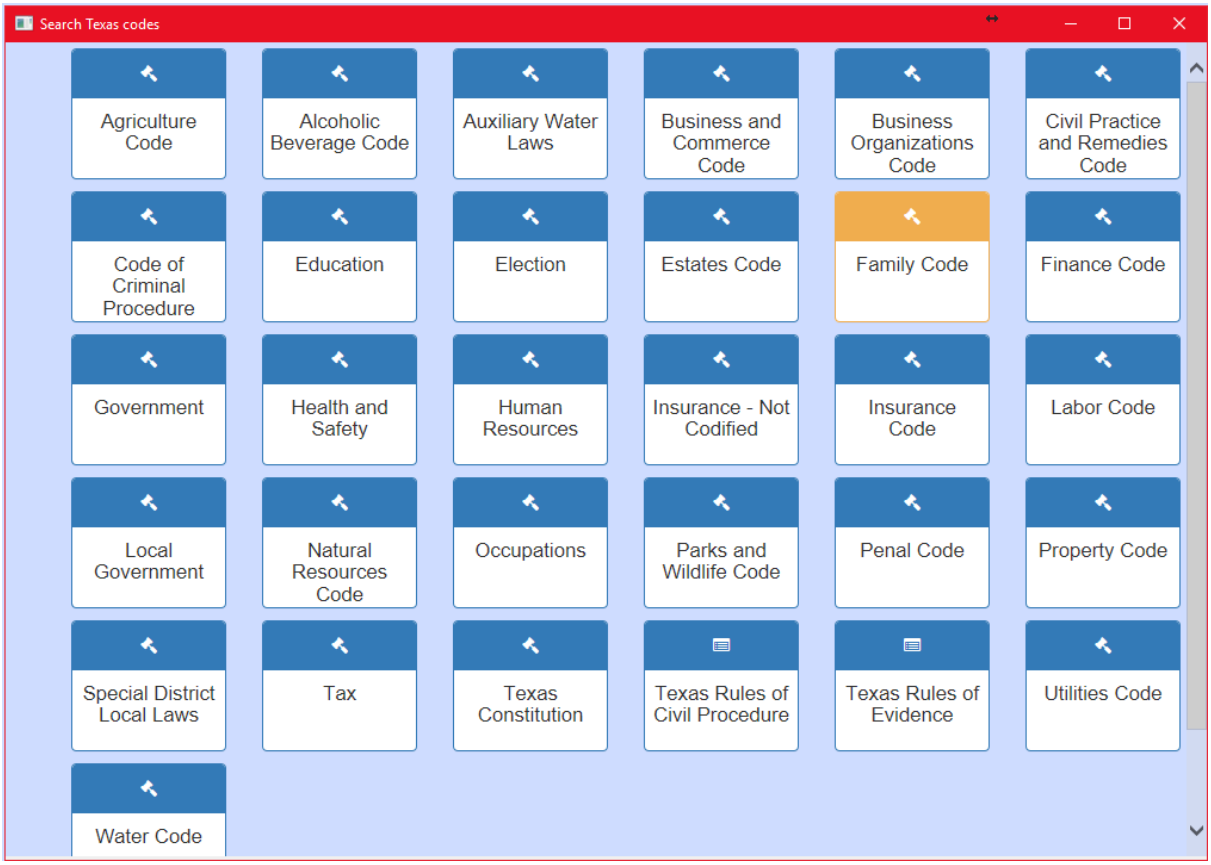
Access **Tools -> Officials** to use this tool. This tool gives you access to a wide variety of Texas offices that you may need information for in one convenient place. You are also able to copy information using the clipboard buttons available in the **Texas Officials** window.



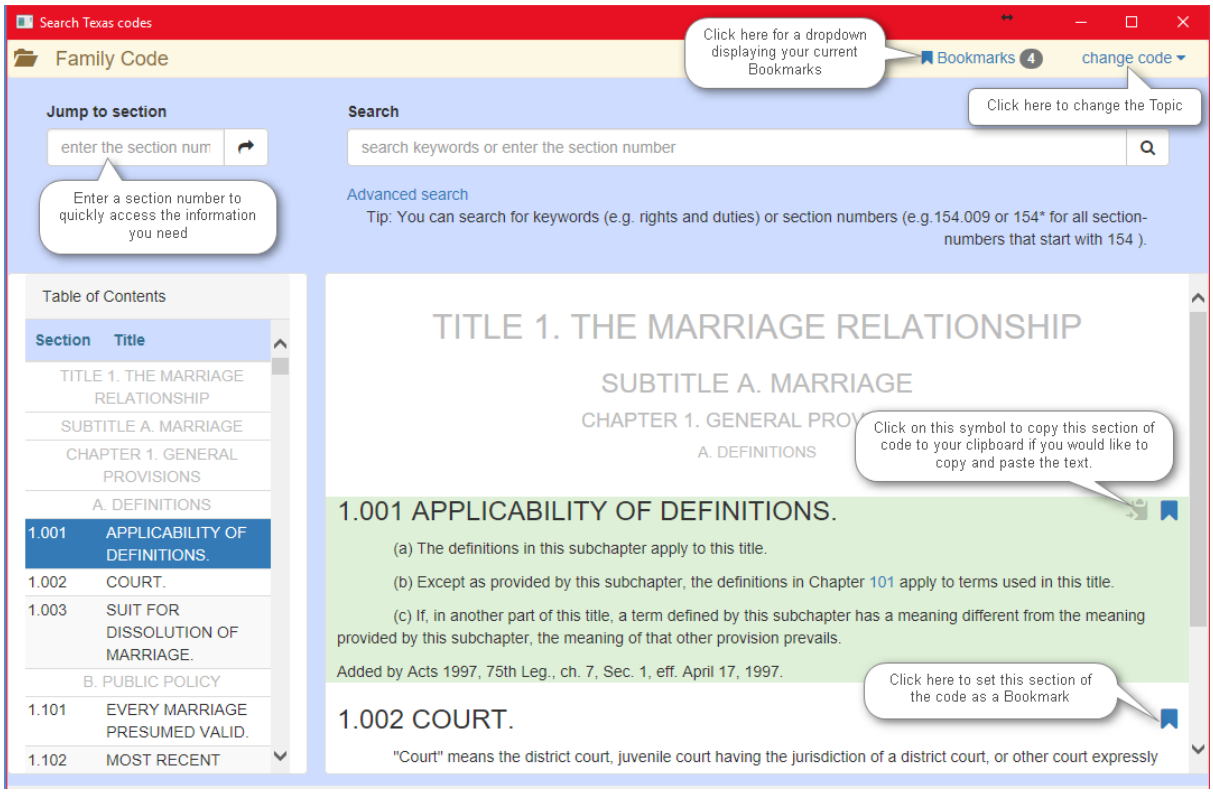
4.9 Texas Codes

4.9.1 Texas Codes Main

This tool will allow you to access Texas' codes and utilize them in whatever way you need. You can access the codes from the **Tool menu** and you will see the **Texas Codes** at the bottom of the menu. There will also be a link in the background for quick access. This is where you will find all the Topics, after selecting the Codes you wish to reference.

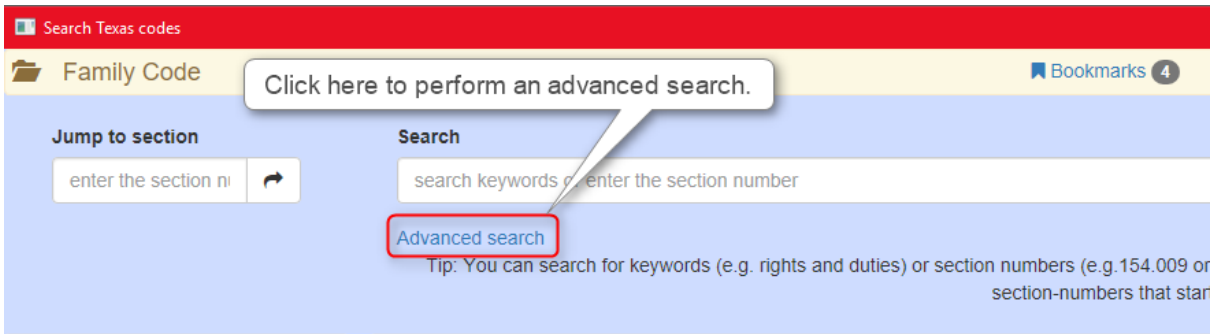


When viewing the codes you will be able to search using keywords or advanced search as well as jumping to different sections using the section number.

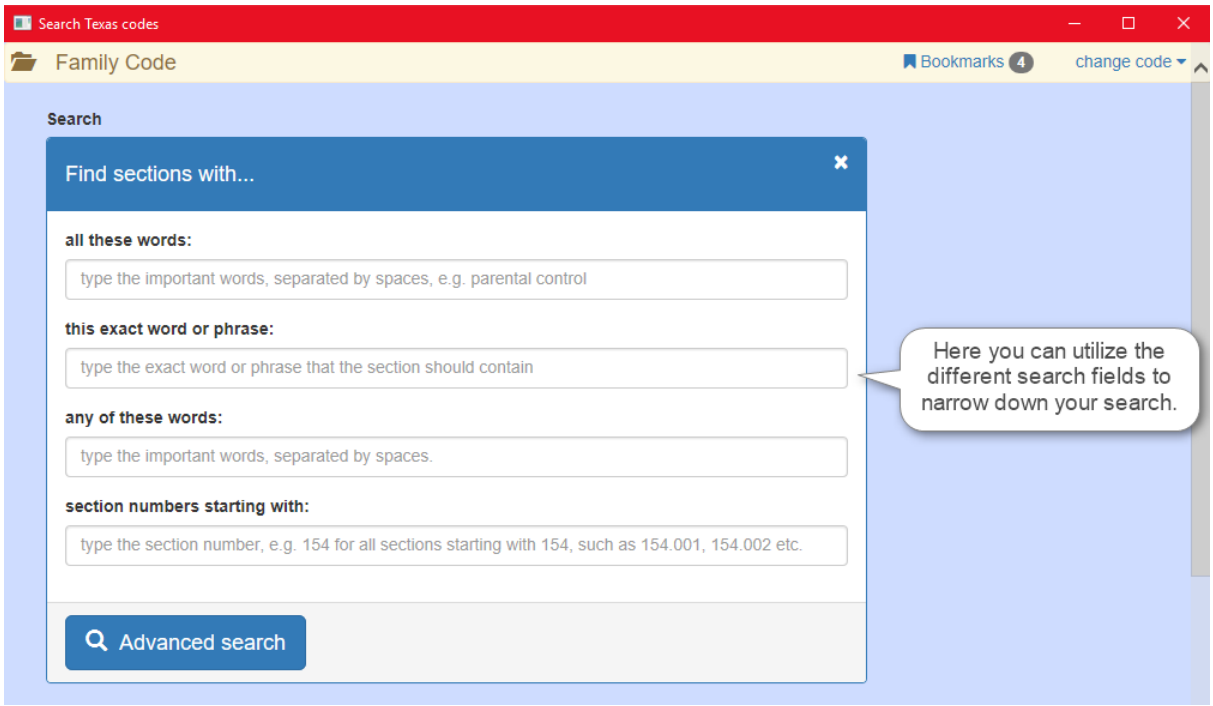


4.9.2 Texas Codes Advanced Search

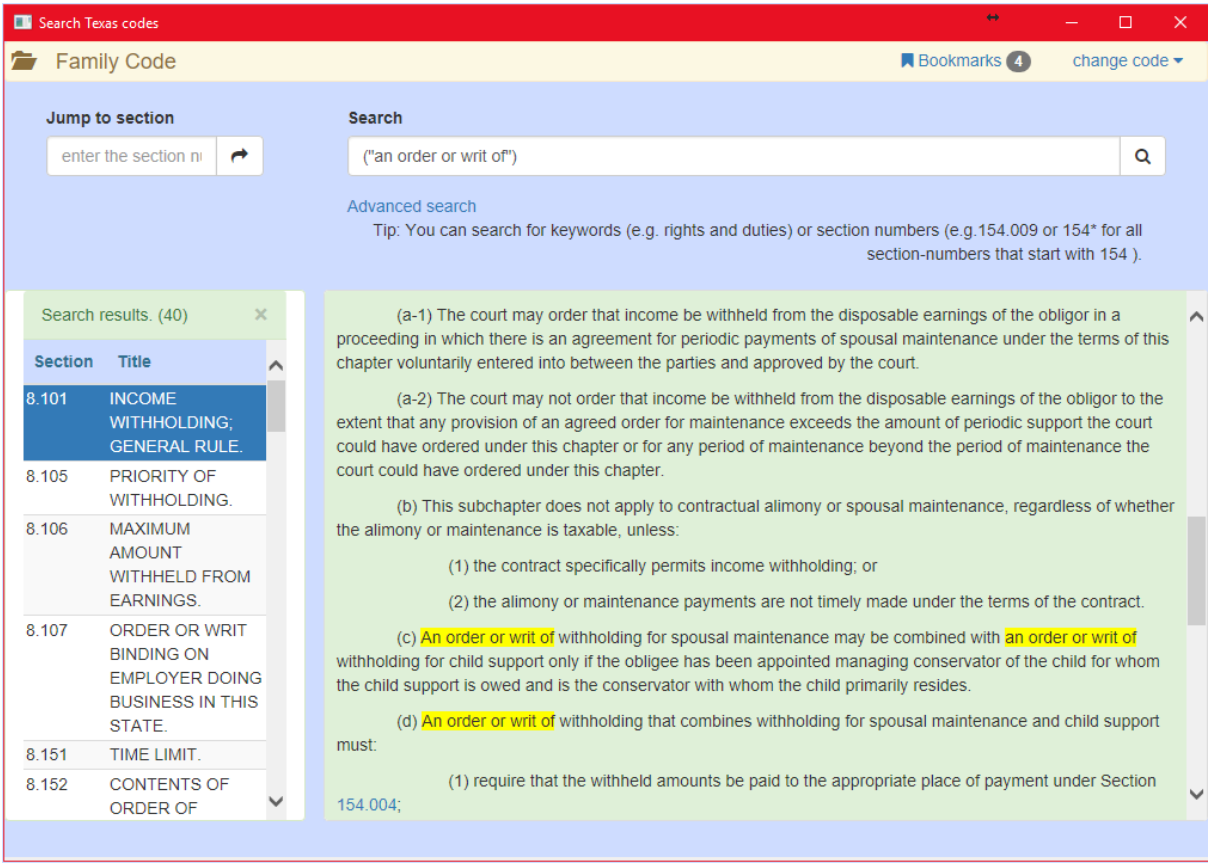
When viewing the codes for any topic, you will see the link for advanced search underneath the regular search bar to access the Advanced Search window.



When using the Advanced search feature in the codes you can be as specific as you want to help you find the section of code that you need. You can utilize as many of the search fields as you need to help you narrow down you search and the hits for your search results will be highlighted in yellow to help you identify them easier.

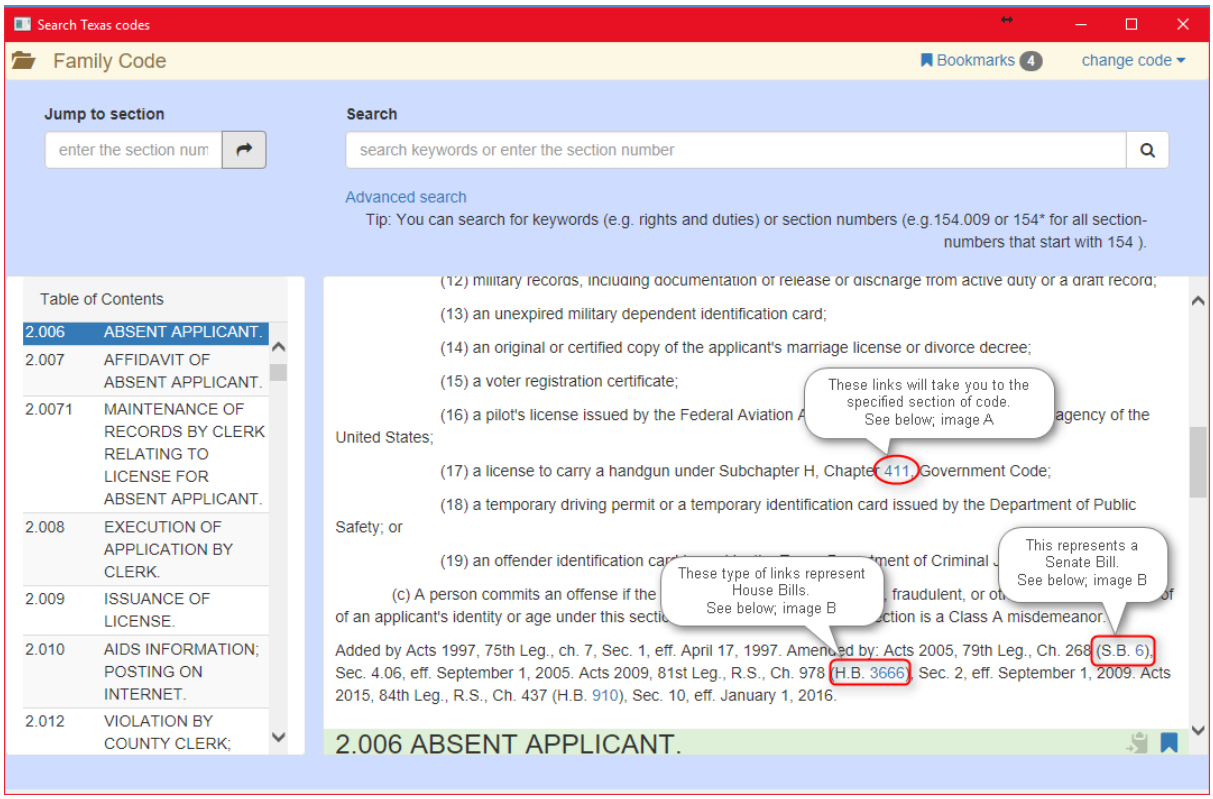


Below is an example of an advanced search using "this exact word or phrase" search option. All search results will be highlighted yellow to make them easily identifiable.



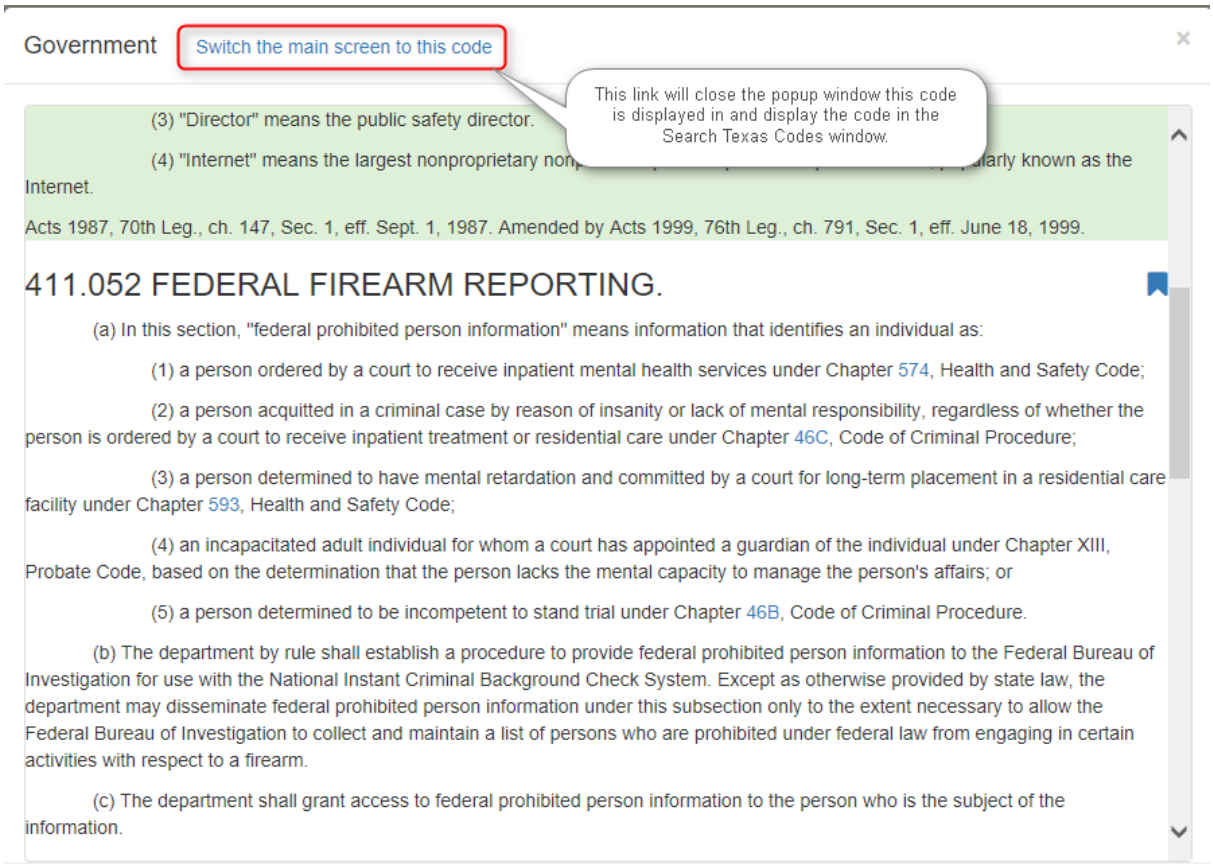
4.9.3 Texas Codes Code Links

Within the Texas Codes are links to sections of code as well as House and Senate Bills. When you click on these links they will open popup windows to display the information you are looking for.



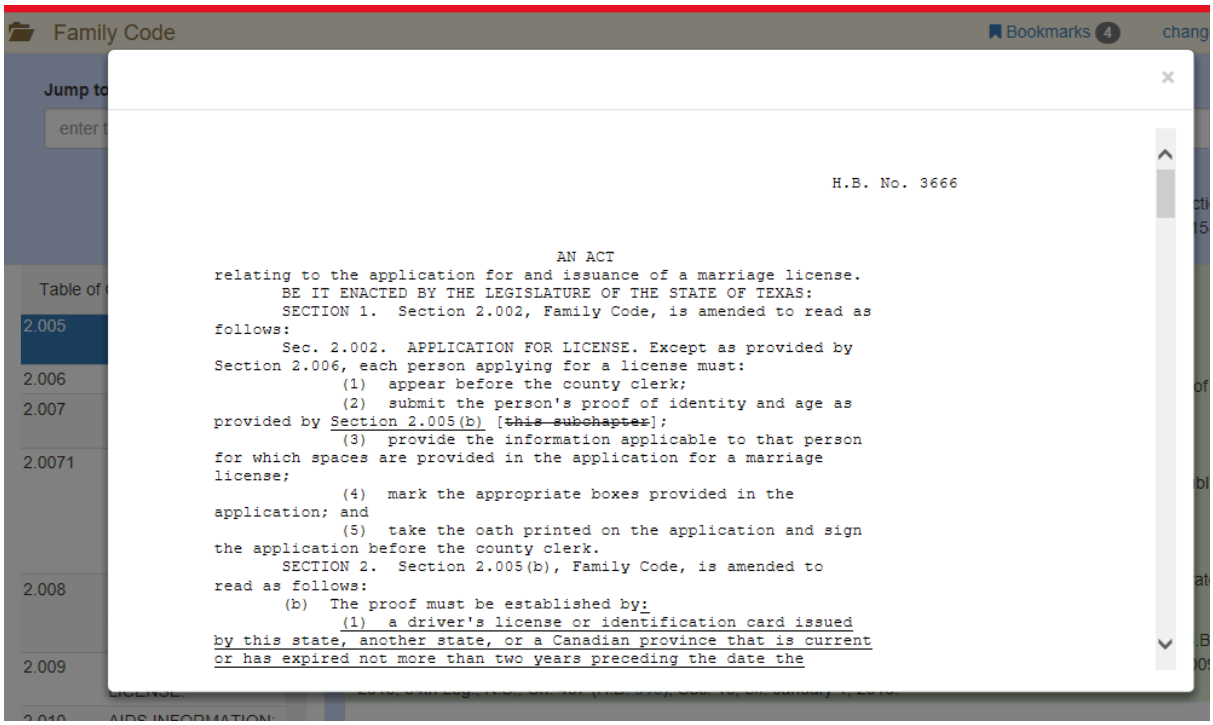
This is what you can expect to see when you click on a link that takes you to another section of code. The **Switch the main screen to this code** link will close the popup window and display that code in the main **Search Texas Codes** window.

APPENDIX A



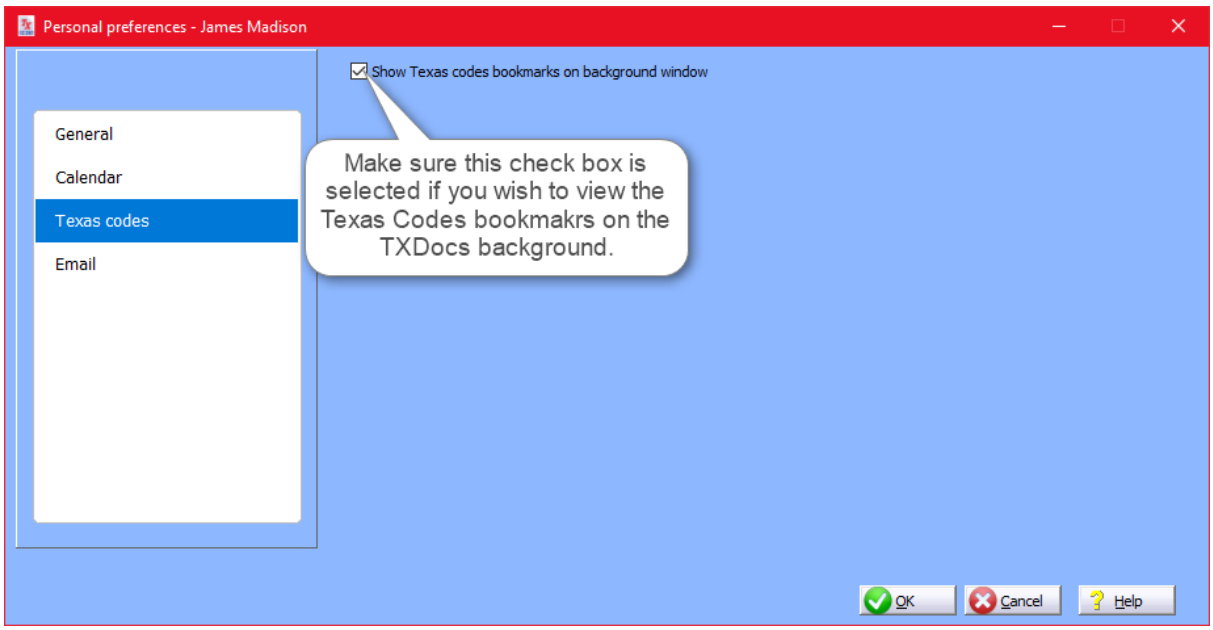
The links preceeded by (H.B. and S.B.) represent **House** and **Senate** bills respectively and will open a popup window with the bill text. There is not a clipboard feature for this text but you can use your cursor to highlight what you need and then you can copy and paste using (Ctrl + C to copy and then Ctrl + V to paste)

APPENDIX B

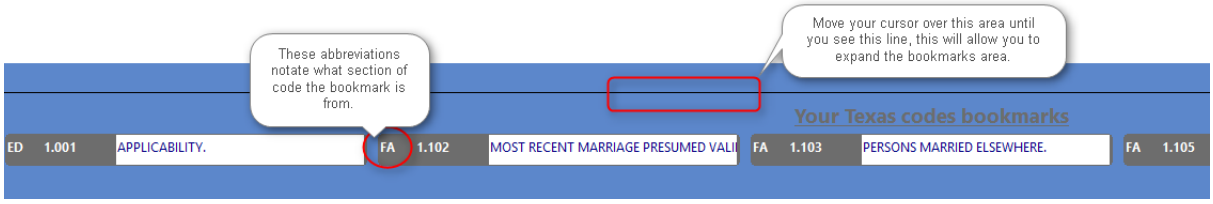


4.9.4 Texas Codes Preferences

You can set Bookmarks to different areas of the Texas codes to appear on background. Simply access the **Setup** menu and then **Personal Preferences**, select **Texas Codes** and check the box to see the bookmarks on the background.



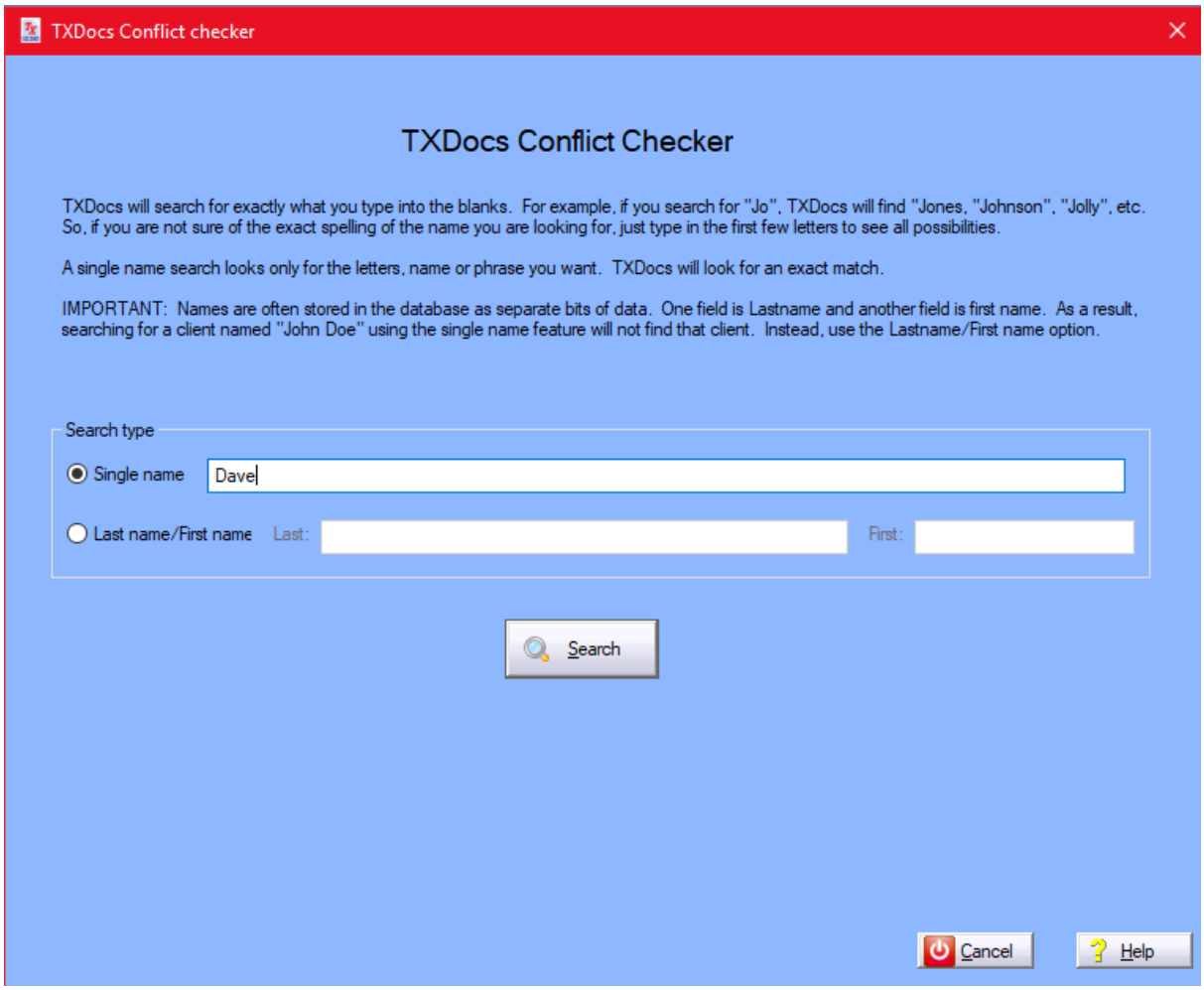
These are what the bookmarks from the Texas Codes will look like. The bookmarks will be located towards the bottom of the background when you have TXdocs open.

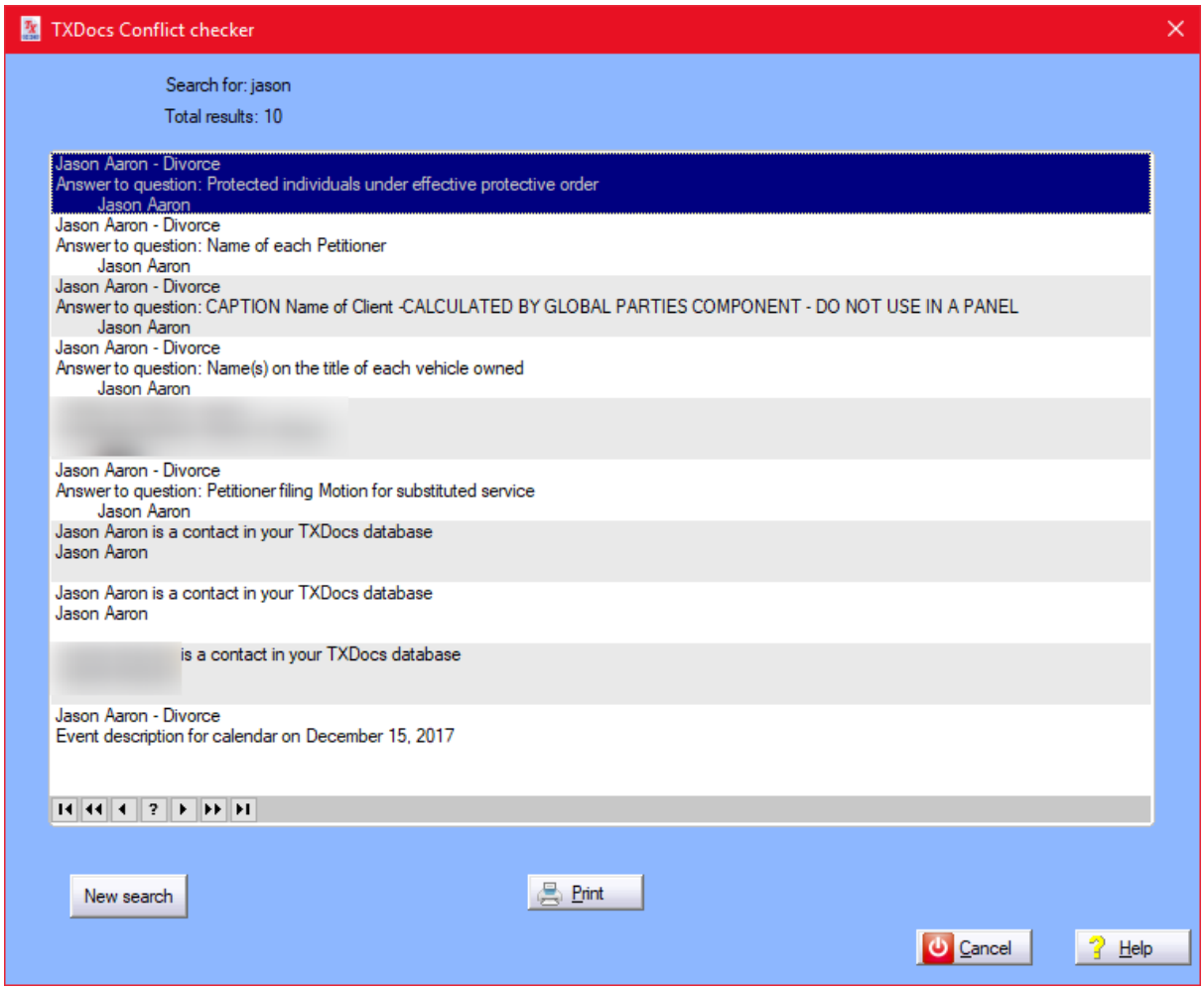


4.10 Conflict Checker

4.10.1 Conflict Checker

This tool will allow you to search through your database and search for records of a past client to avoid any conflicts it may cause with a new client. 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. These results will be pulled from your database where the clients name is entered into one of these places; Answers, Contacts, Case notes, Events, Expense slips, Tasks and Time Slips. For the following items; Case notes, Events, Expense slips, Tasks and Time Slips you will only see the search results come up if their name you searched for has been entered into the description field for the items mentioned.





Reference

5 Reference

5.1 TXdocs Guide for Calculating Child Support Obligations

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 Assisance 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 2013 tax charts provide social security and income tax for incomes of $3,100 and for $3,200.

Social Security

Gross Wages	Old Age	Medicare	Federal Income Tax
3,100	192.20	44.95	302.81
3,200	198.40	46.40	317.81

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: 302.81
   Net on $3,100: 3,100 - 192.20 - 44.95 - 302.81 = 2,560.04

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: 317.81 - 302.81 = 15.00
   22.65

At this point, we know there is an additional $22.65 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

22.65/100 = .2265

Social security and income tax on $27: 27 * .2265 = 6.1155
Net on $27: 27 - 6.155 = 20.845

3. Net after tax income: 2,560.04 + 20.845 = $2,580.88

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. provides the following guidelines when the obligor only has children in one household:

- 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

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 suport 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 a table showing the percentages to be applied for any combination of seven children in multiple households. 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.

- A -

- C -

- D -

- E -

- F -

- G -

- H -

- I -

- L -

- M -

- O -

- P -

- R -

- S -

- T -

- U -

- W -