# TXdocsPlus

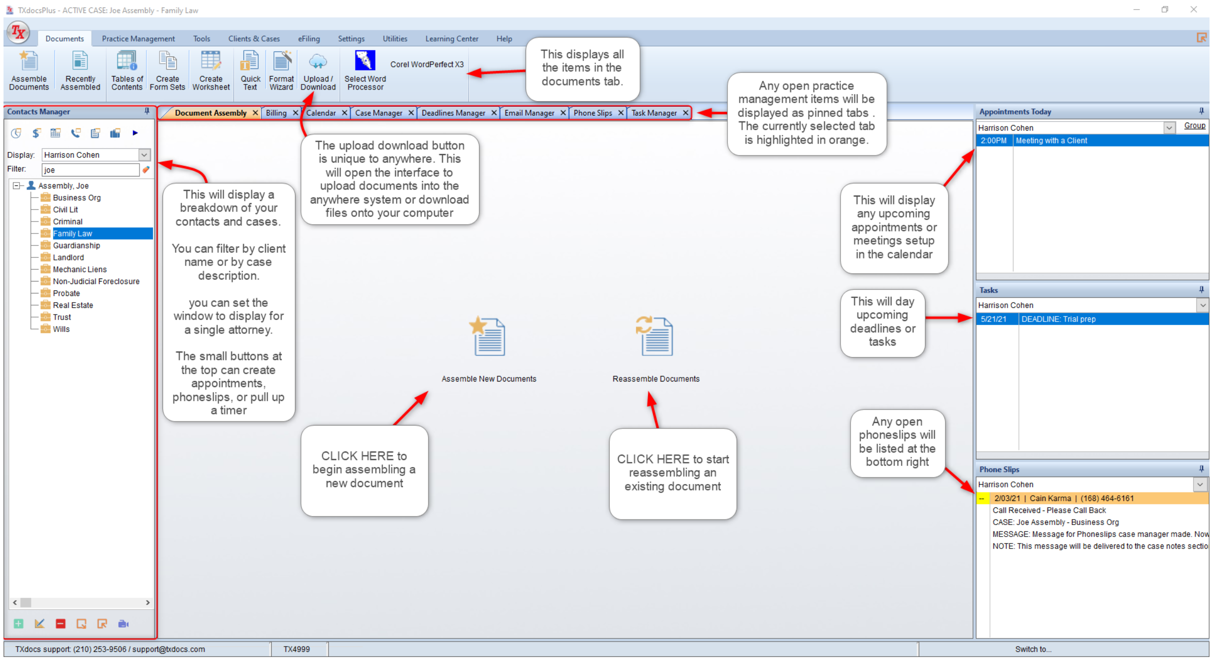
# USER MANUAL


Schoolcraft Legal Systems, Inc.

# Introduction

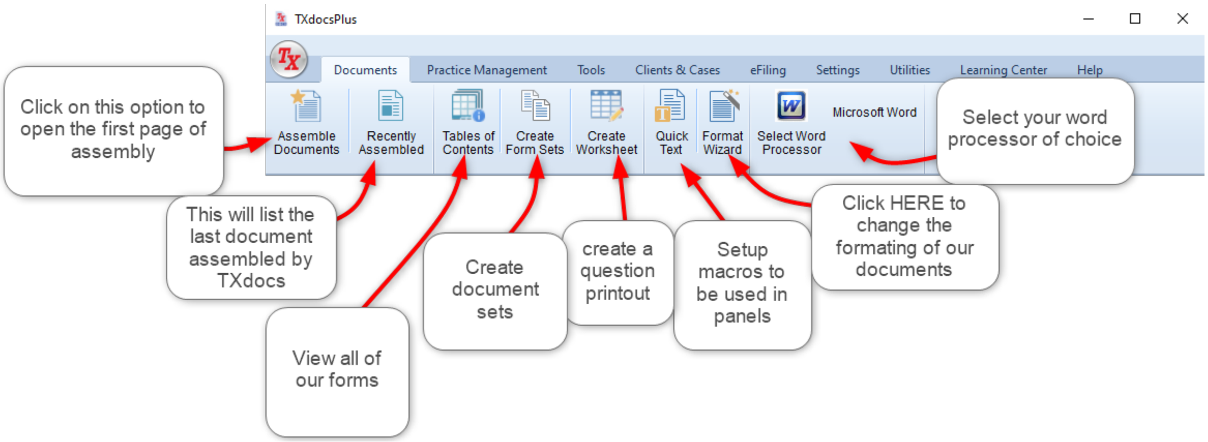
# 1 Introduction

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



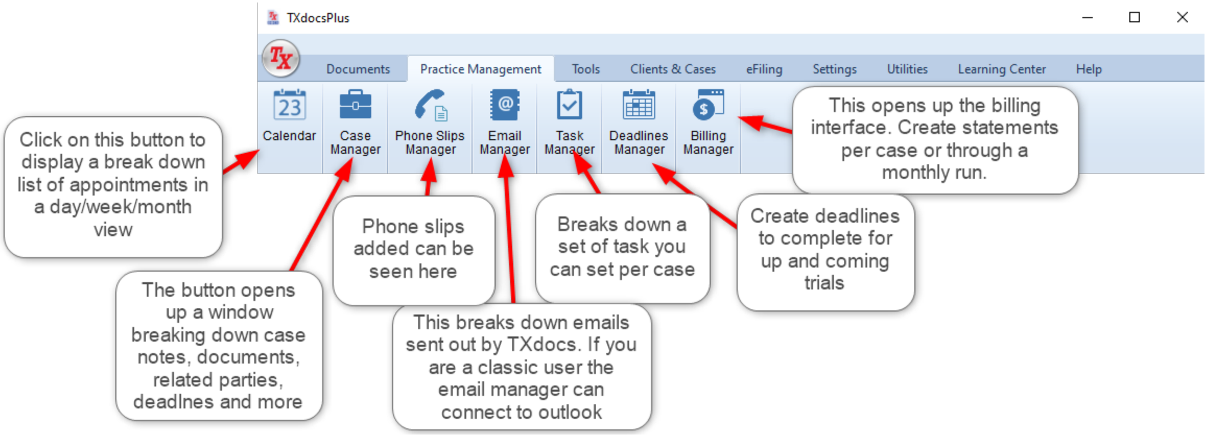

TXdocs is organized in 8 major categories:
(1.)Documents
(2.)Practice Management (Available only in TXdocsPLUS)
(3.)Tools
(4.)Clients & Cases
(5.)eFiling (coming in the Fall of 2020)
(6.)Settings
(7.)Utilities
(8.)Learning Center
Each category can be selected by clicking the appropriate tab at the top of the ribbon bar

DOCUMENTS TAB



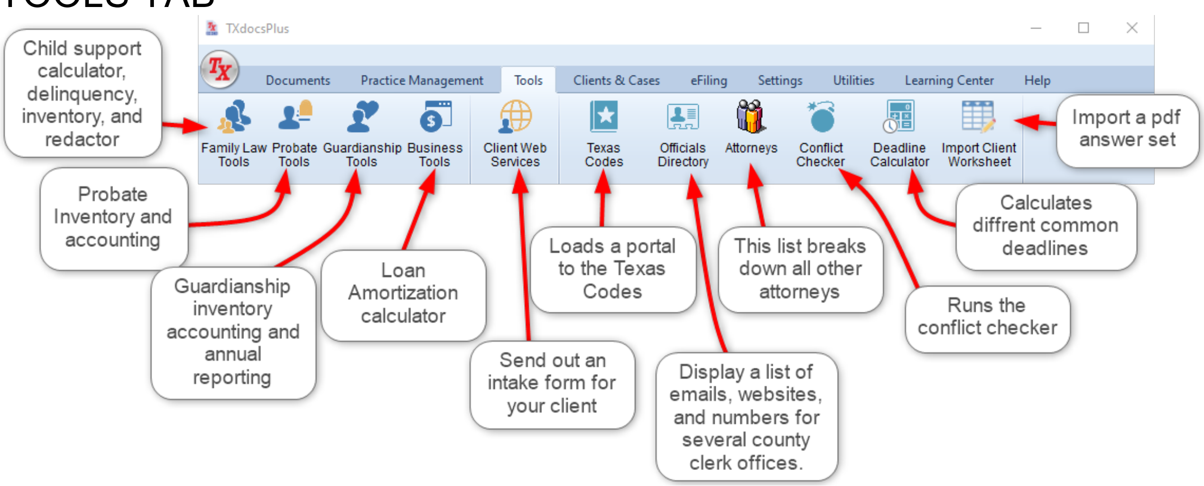

Documents Tab information

PRACTICE MANAGEMENT TAB



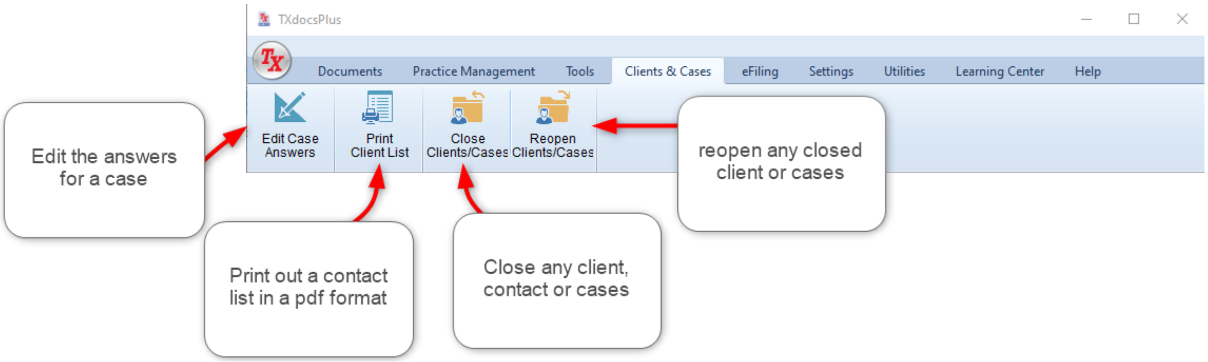

Practice Management Tab information

TOOLS TAB



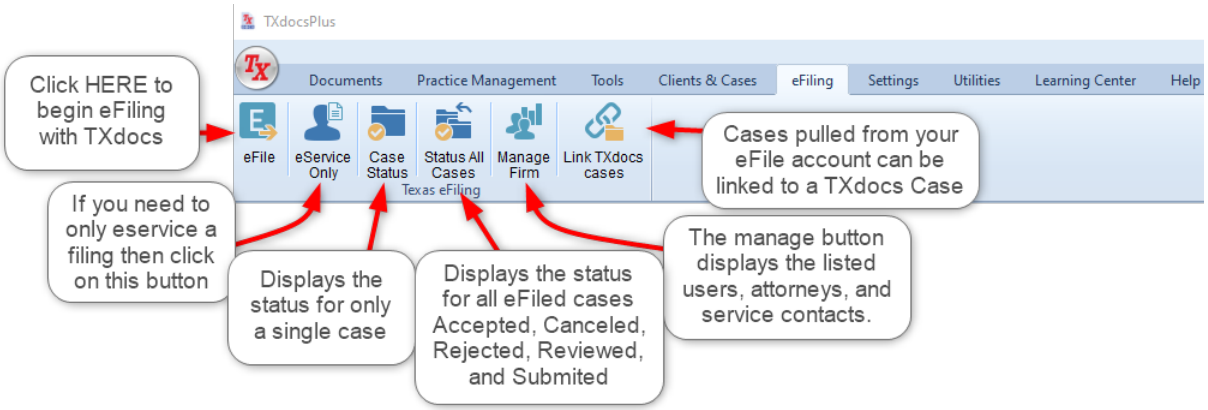

Tools Tab information

CLIENTS & CASES TAB



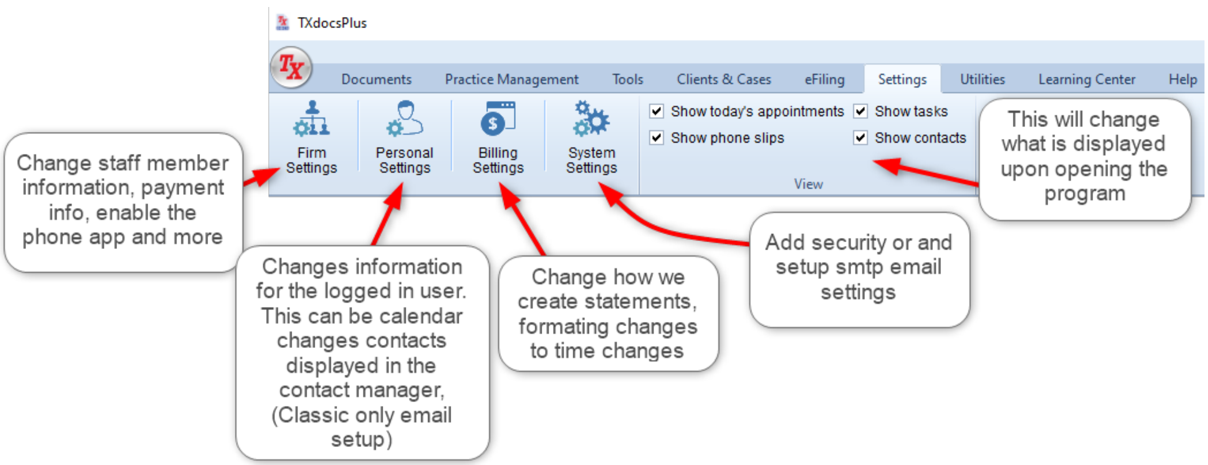

Clients & Cases Tab information

EFILING TAB



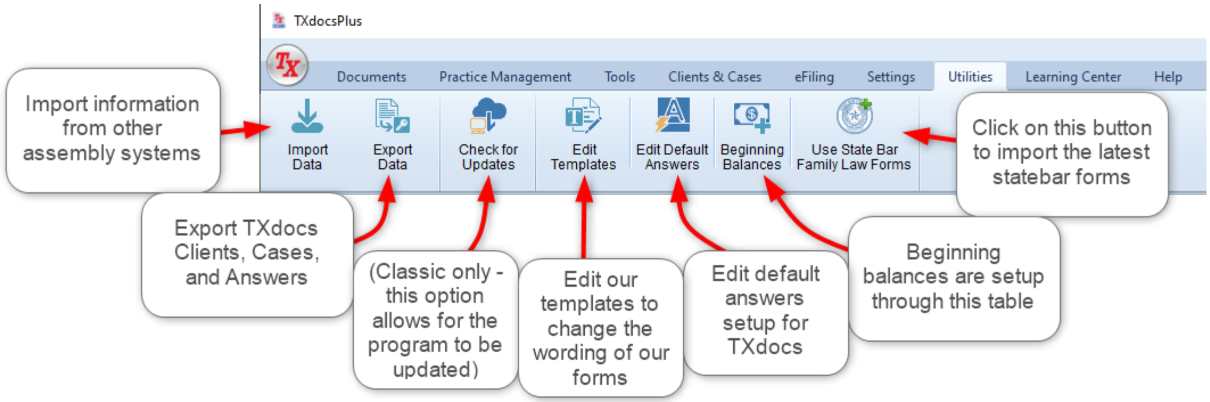

[eFiling Tab information]

SETTINGS TAB



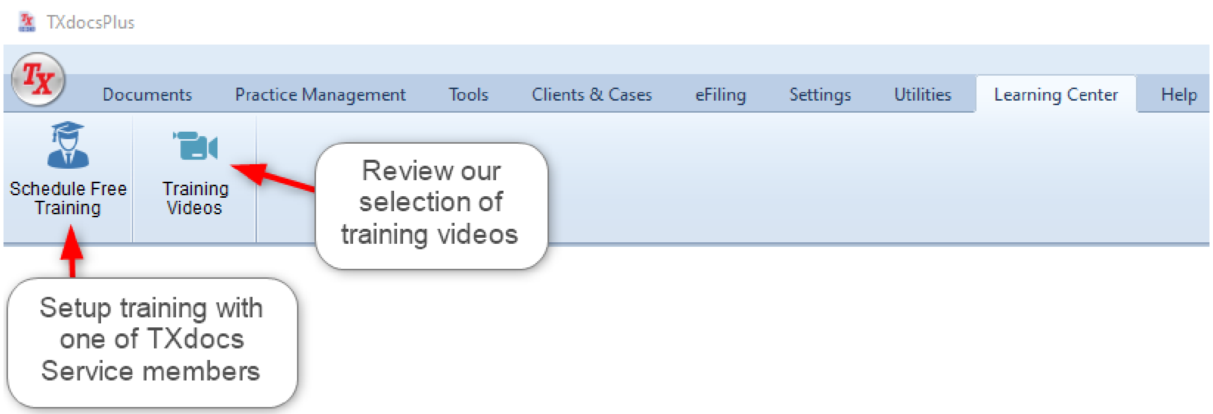

Settings Tab information

UTILITIES TAB




Utilities Tab information

## LEARNING CENTER TAB




Learning Center Tab information

# Getting Started

## 2 Getting Started

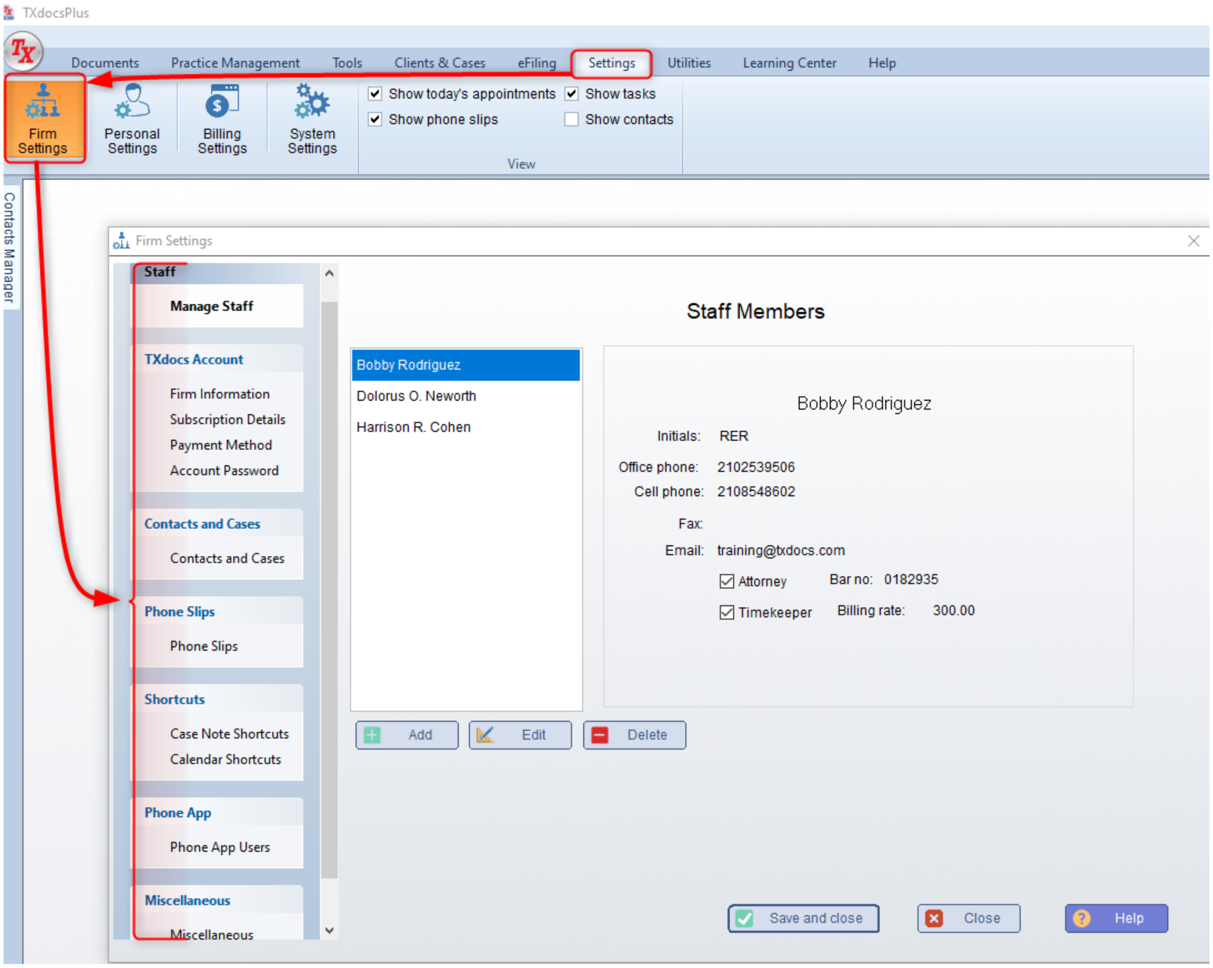
Although you are undoubtedly anxious to get started assembling documents, you REALLY NEED to take a few minutes to set TXdocs up to work the way you want it to. This will save you lots of time and effort n the long run.

Setup - Firm Settings

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

Complete the following:

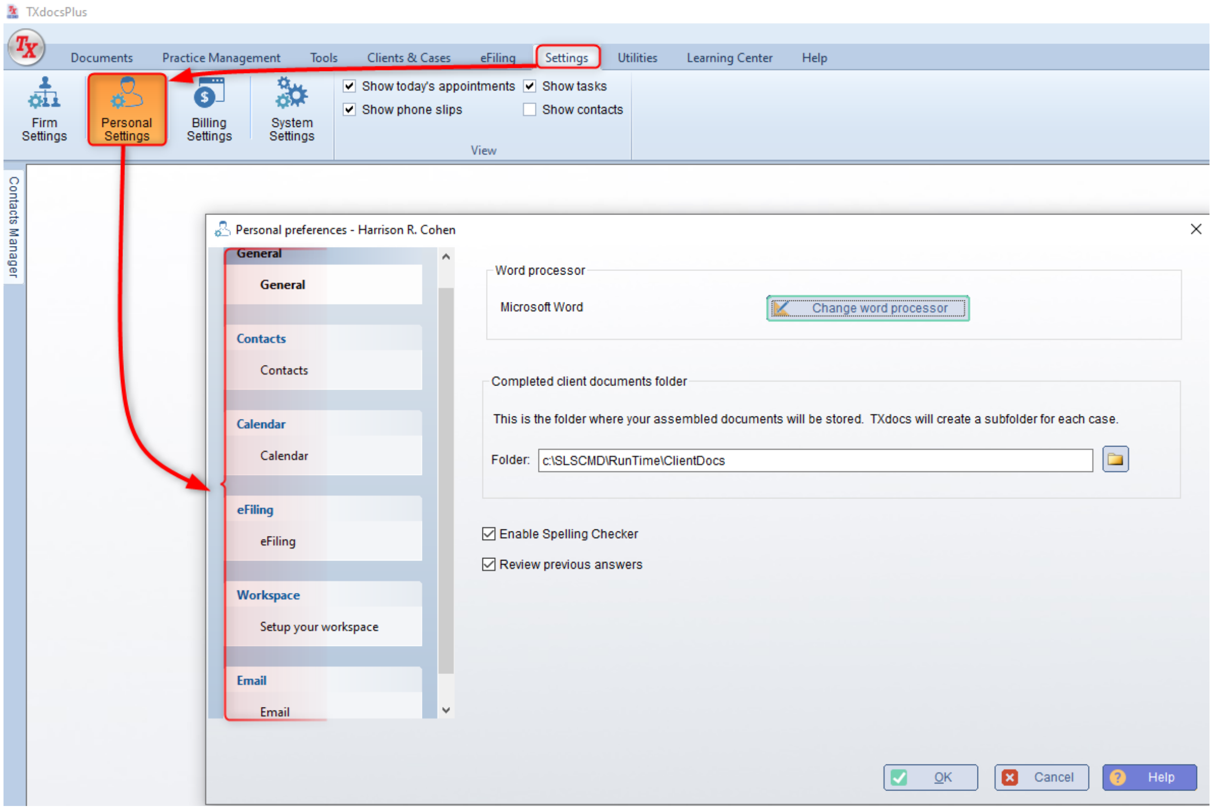
- Manage Staff - add your personal information as a staff member
- TXdocs Account - look here to verify that we have the correct name and other information for your firm.
- Contacts and Cases - Add case Ides to the contact manager
- PhoneSlips - Set up phone slip actions and the priority of those actions
- Shortcuts - Add short cuts to case notes and calendars
- Phone App - Enable the phone app for the user
- Miscellaneous - Enables the efiling service and auto save




Setup - Personal Settings

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

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




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

[Introduction to TXdocs]

[How to assemble documents in TXdocsPLUS]

# Settings - Customizing TXdocs

# 3 Settings - Customizing TXdocs

## 3.1 Firm Settings

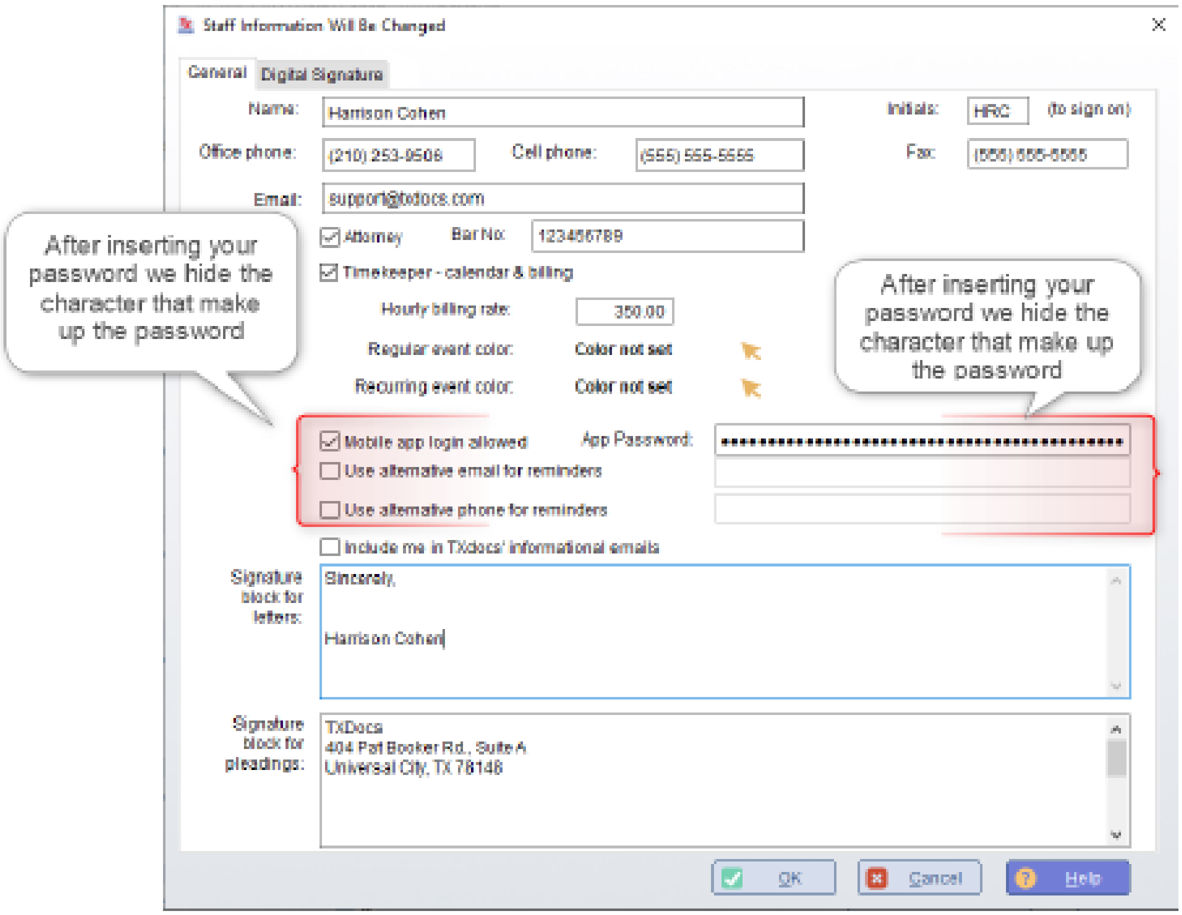
Firm settings apply to everyone in your firm.  If you want to customize how TXdocs functions for you specifically, you need to use Personal Settings

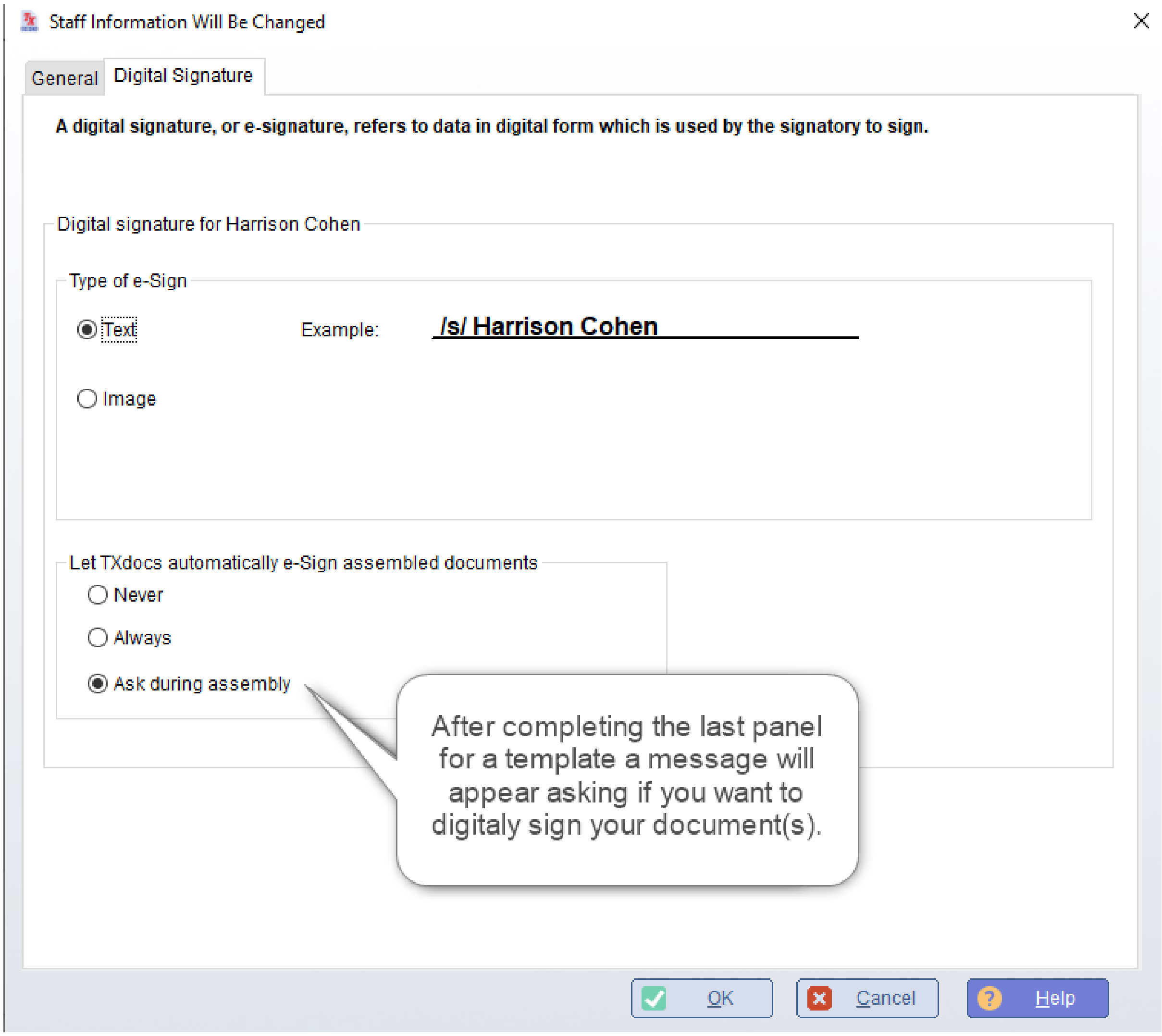
Firm Settings Table of Contents

### 3.1.1 Manage Staff

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

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





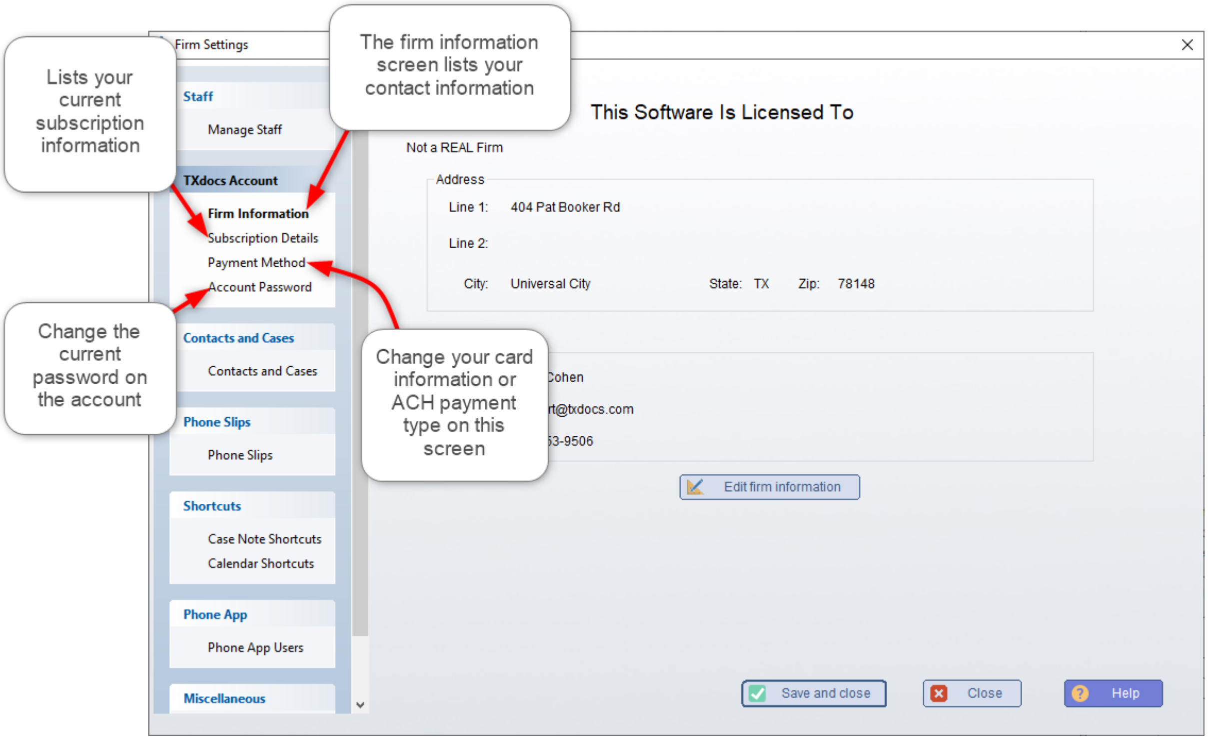

### 3.1.2 TXdocs Account

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

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

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

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




### 3.1.3 Contacts and Cases

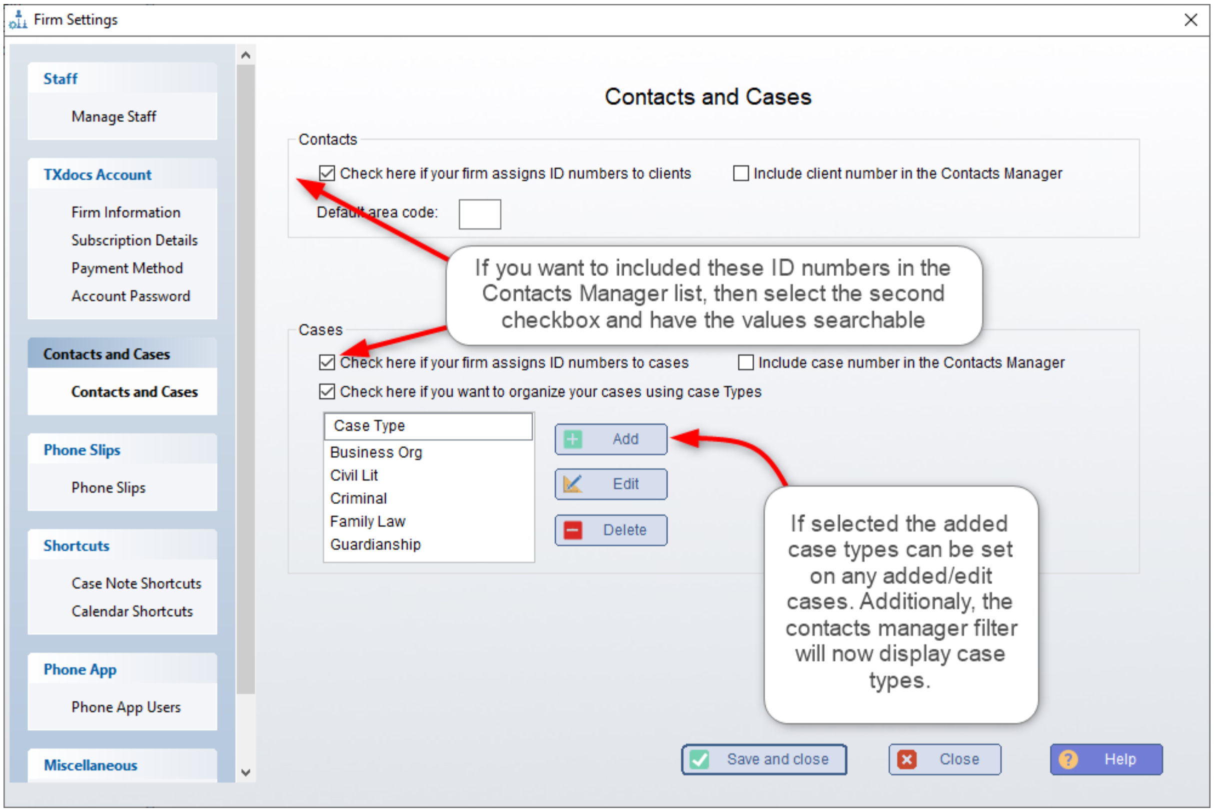
**Check here if your firm assigns ID numbers to Clients:** Some firms assign ID numbers to clients as they open them. For example "2021-ALS-132". If you want to include client ID numbers when you add a client to the system check this box.

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

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

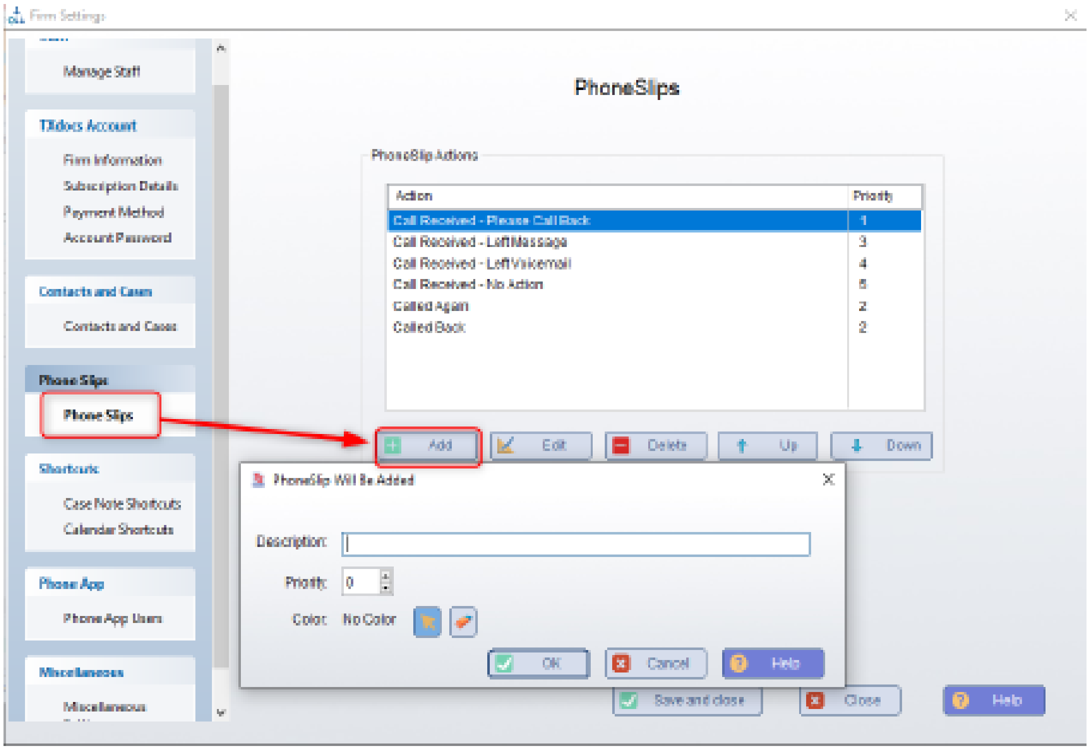
**Check here if you want to organize your cases using case types:** If you check this box then you can add as many case types as you wish: You can use general types such as "Family" or "Criminal" or you can be even more specific like "Divorce" or "Set Bond ". You will be able to sort, filter and report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

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




### 3.1.4 Phone Slips

When you create a phone slip you select an action to go with the the phone slip. Initially TXdocs is set up with the ones shown in the list below. You can add, edit, delete and reorder the items in the list.



### 3.1.5 Case Note Shortcuts

Shortcuts let you set up hotkeys to insert standard language into a case note. For example, you could set up a shortcut of "/mwc" that would insert "met with client" into any case note you are editing.

### 3.1.6 Calendar

Shortcuts let you set up hotkeys to insert standard language into an event description. For example, you could set up a shortcut of "/occ" that would insert "office conference with client" into any event you are editing.

### 3.1.7 Phone App

TXdocsPlus subscriptions include a phone app that can be run on your cell phone. It provides your client/case list and your calendar. It also lets you create time slips and expense slips form your phone. You must check the **Phone App enabled** box here in order to enable phone app use by your firm.

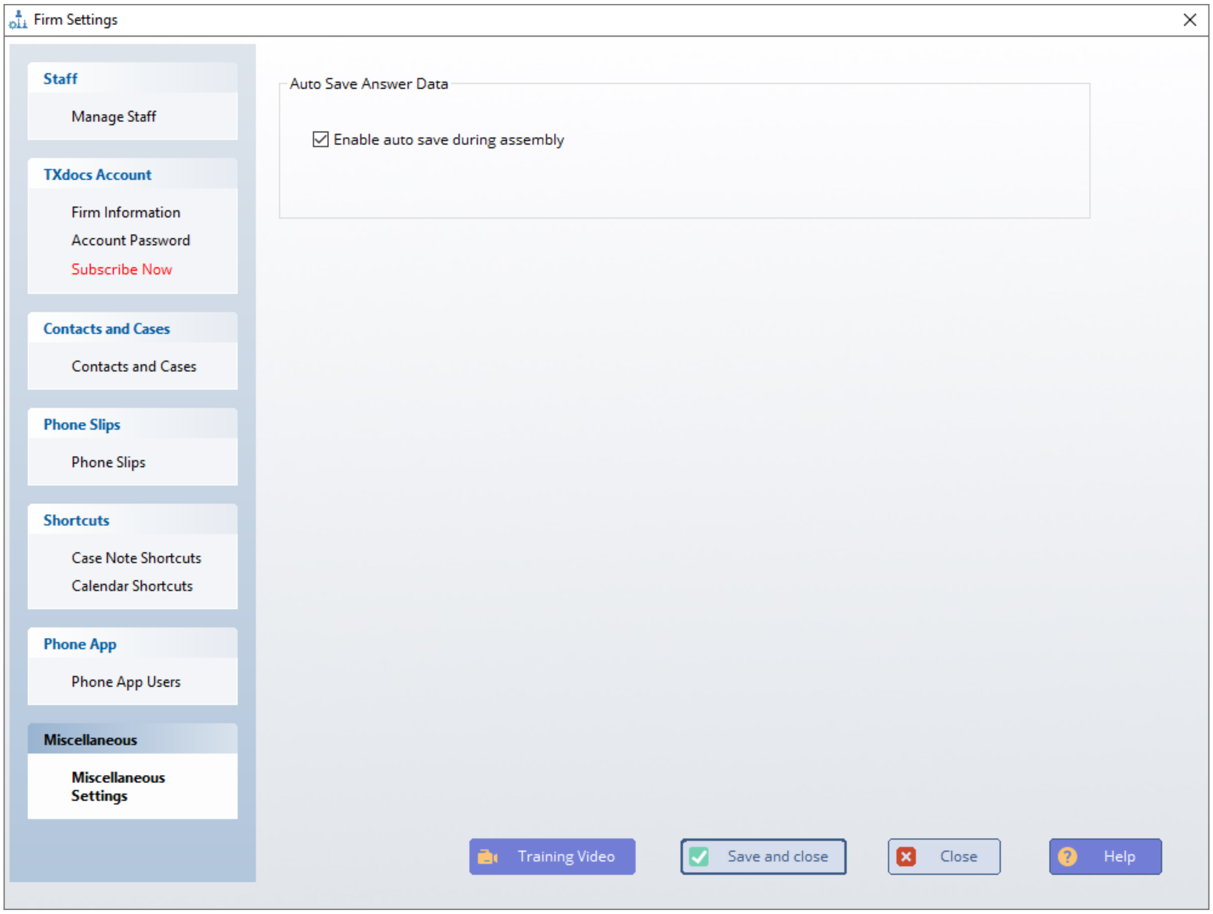
After you have enable the phone app here, you can go to your Manage Staff setup page and enable phone app usage there the members of your firm that you want to have this kind of access.

You can download a short manual on how to setup and use the TXdocs phone app here:

Download TXdocs Phone App Manual

### 3.1.8 Miscellaneous

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




## 3.2 Billing

TXdocs' billing system is the most customizable part of the entire program. There are an awful lot of options so we hope this help system will help you understand how to use them.

### 3.2.1 Billing Preferences

**Statements are due:** TXdocs uses this entry to calculate the "Due date" that is printed on the statement.

**Printer:** Your selection here simply sets the printer that will be preselected whenever you generate statements. You will always be able to select a different printer when you are getting ready to print.

**Consolidate statements if client has multiple cases:** This applies to when you are generating monthly statements. If you select this option then TXdocs will generate one statement that includes charges and payments for all cases you have for each client. The charges and payments will be shown in different sections on the statement for each case. NOTE: When you add a client to TXdocs, you have the option to "Consolidate statements" for that client. If you set the client to consolidate, then TXdocs will consolidate cases for that client even if this option is not selected in preferences.

**Automatic application of available trust funds:** TXdocs can will automatically apply any available trust funds to the balance due on a statement and insert an item showing this on the statement. This setting tells TXdocs to preselect this option when you are adding a case into TXdocs.

**Allow Monthly Fee:** Some people call these monthly service fees or monthly retainer fees. Basically, it is a monthly charge to a client for simply being available to them. Selecting this option gives you the ability to set a monthly fee for a case as you add the case to TXdocs.

(You can also edit a case to add or remove a monthly fee.) If you select this option, then the additional fields next to it become visible.

Amount: This entry field is where you set the amount of the fee

**Fee label:** This is the description that shows on the statement.

**Allow alone on a statement:** Select this option if you want TXdocs to put this fee on a statement even if there was no activity for the billing period.

**Default Payment Type:** This option just tells TXdocs what you want preselected when you enter a client's payment into TXdocs.

**TIME INCREMENTS -** these settings tell TXdocs how you want to account for and bill for your time.

**Increment Type:** Select how you want to reference time spent on a task.

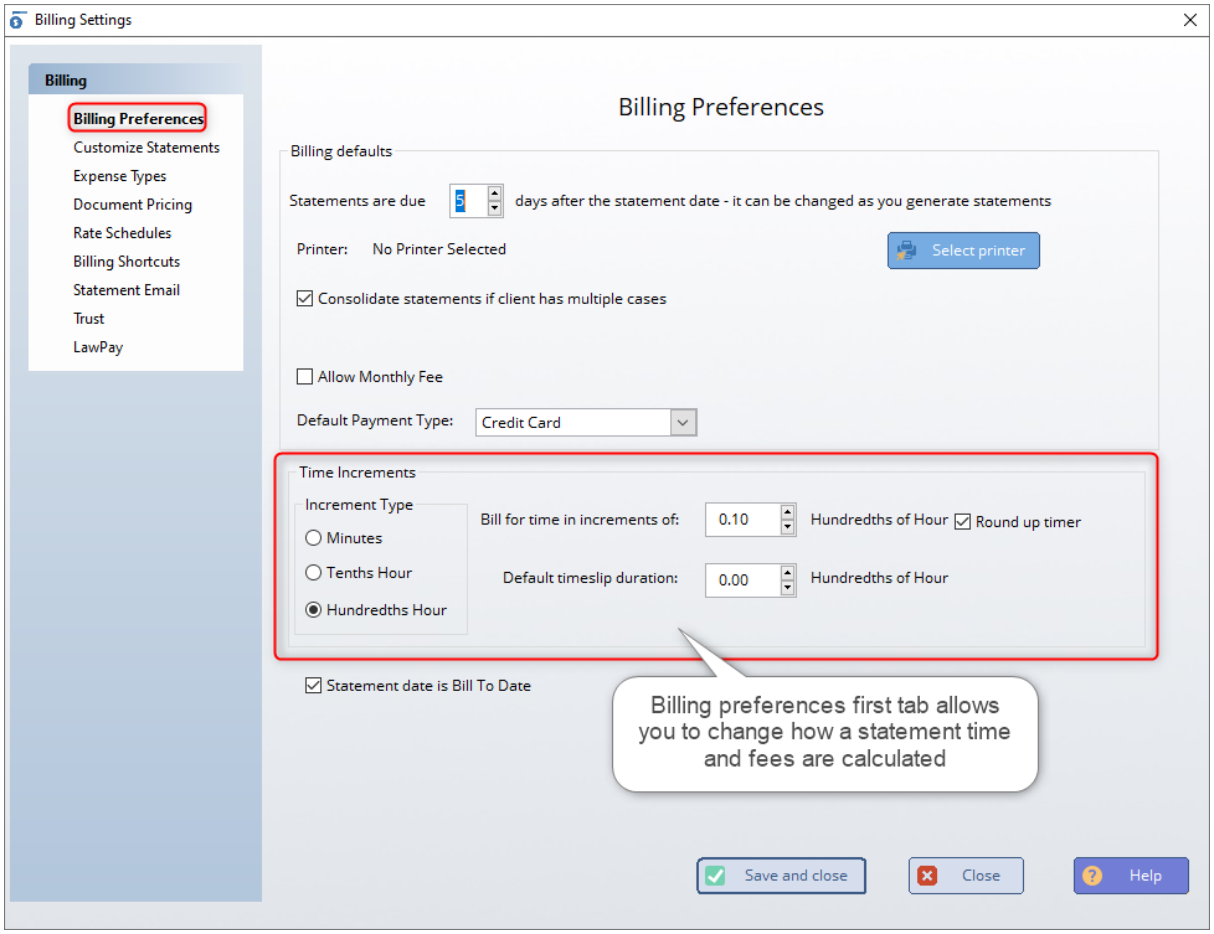
**Bill for time in increments of:** When you are creating a time slip, this determines what type of number is valid. For example, if you set the time increment to "5 minutes", you would not be able to enter "17 minutes".

**Default timeslip duration:** This tells TXdocs what you want a timeslip preset to when you are creating a new one.

**Round up timer:** When you use TXdocs' timer feature, the timer will normally round down to the nearest valid time increment when you stop the timer. This option will cause TXdocs to round up.

**Enable emailing statements:** Select this option if you want to have the option to email statements to you clients. NOTE: If you select this, you can go to "Customize Statements" and set up the text that you want on the email that sends the statement.

**Statement date is Bill to Date:** When you generate statements, you must tell TXdocs which items to include in the statement. That is, do you want to include every charge and payment up to today, or do you only want to include charges and payments that accrued through the end of the previous month. This option tells TXdocs to be preset to include everything up to the present moment.




### 3.2.2 Customizing Statements

**Show timekeeper's initials on statement:** Select this if you want to show who did the work that is being billed for.

**Aged receivables:** This will insert an aged receivables section at the top of the statement to show the amount and age or previous balances still due.

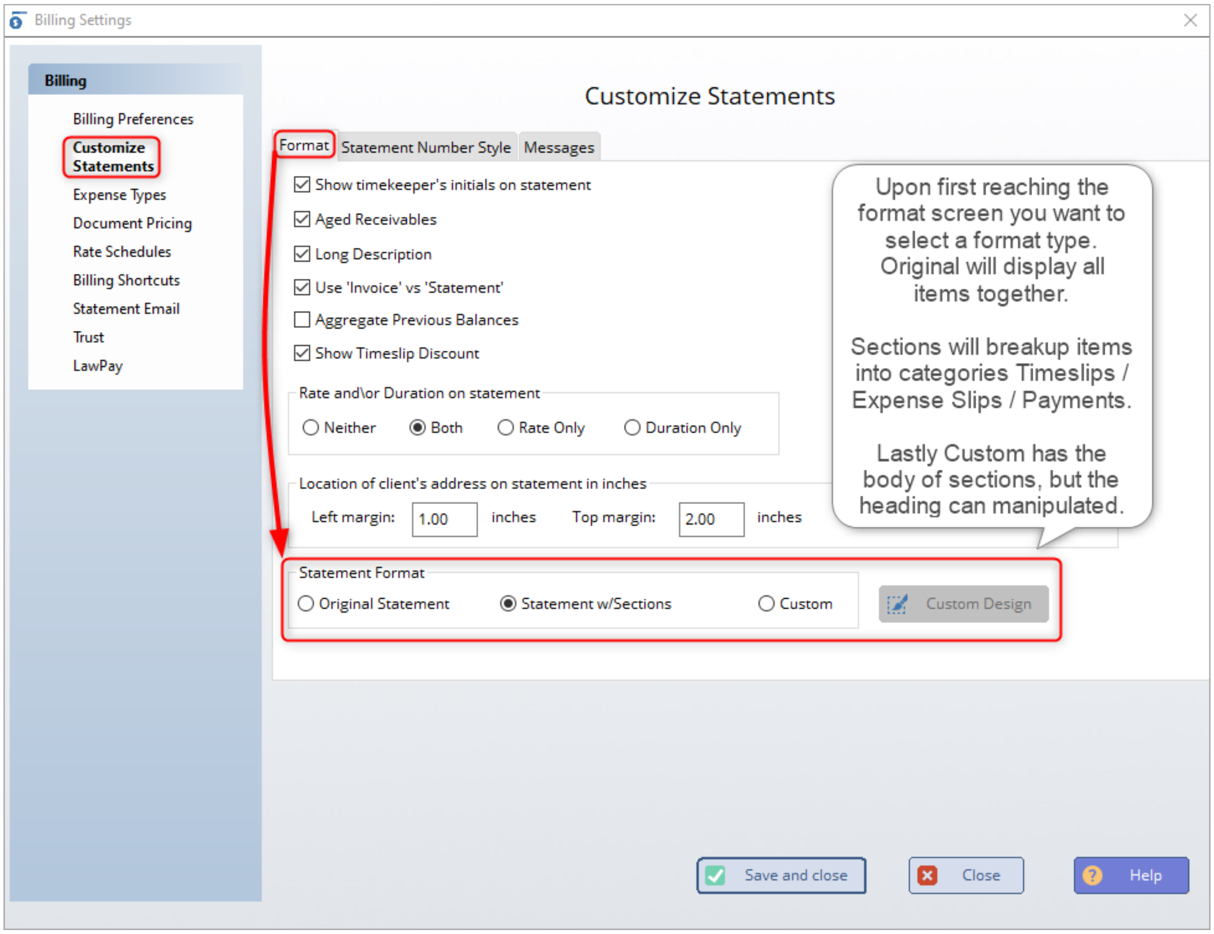
**Long description:** By default, TXdocs will only show the short description you provided for each time slip and billing slip. If this option is selected, then the complete description that you enter for the slips is printed (up to 5,000 characters).

**Use 'Invoice' vs. 'Statement':** By default, TXdocs uses the word statement. Like "Statement date:'. This option tells TXdocs to use 'Invoice' instead.

**Rate and\or Duration on statement:** Choose if you want either of these to be printed for all time slips.

**Location:** If you use pre-printed statement forms, use this section to tell TXdocs where to print the statement.

**Statement Format:** The first image below shows the "Original Statement" format. The second image shows the "Statement w/ Sections" format. You can also custom design statements to look any way you like. There is a completely different help section on custom designing statements.



Optionally change this to "Statement date:"

Aged receivables option.

TXdocs
404 Pat Booker Rd.
SUITE 1000
Universal City, TX 78148

Invoice date: 7/31/2020

Jane Doe

| | | | |
|---|---|---|---|
| Due date: | 8/11/2020 | | |
| Total due: | $3,133.75 | | |
| Cur: | 30: | 60: | 90+: |
| 1,487.50 | 318.75 | 1,327.50 | 0.00 |

You can show the timekeeper's initials in this column.

Cas Divorce

| | | | | | |
|---|---|---|---|---|---|
| | Divorce | | | | |
| 5/31/20 | Balance from statement dated 5/31/20 | | | | 1,327.50 |
| 6/30/20 | Balance from statement dated 6/30/20 | | | | 318.75 |
| 7/07/20 | Depositions | Duration: | 3:30 Rate: | 425.00 | 1,487.50 |
| | BALANCE DUE FOR THIS CASE | | | | 3,133.75 |

Optionally show the duration and rate for time slips.

**This shows a statement with sections.**

TXdocs
404 Pat Booker Rd.
SUITE 1000
Universal City, TX 78148

Invoice Date: 7/31/20

Jane Doe

| | | | |
|---|---|---|---|
| Due Date: | 8/11/20 | | |
| Total due: | 3,133.75 | | |
| Cur: | 30: | 60: | 90+: |
| 1,487.5C | 318.75 | 1,327.50 | 0.00 |

**Case:** Divorce

**Previous Balances**

| Date | Description | | Amoun |
|---|---|---|---|
| 5/31/20 | Balance from statement dated 5/31/20 | | 1,327.50 |
| 6/30/20 | Balance from statement dated 6/30/20 | | 318.75 |
| | **Previous Balance:** | 1,646.25 | |

**Billed Time**

| Date | Time Keeper | Activity | | Time | Rate | Amoun |
|---|---|---|---|---|---|---|
| 7/07/20 | | Depositions | | 3:30 | 425.00 | 1,487.50 |
| | **Total Time Billed:** | | 1,487.50 | 3:30 | | |

**Total due for case:** Divorce 3,133.75

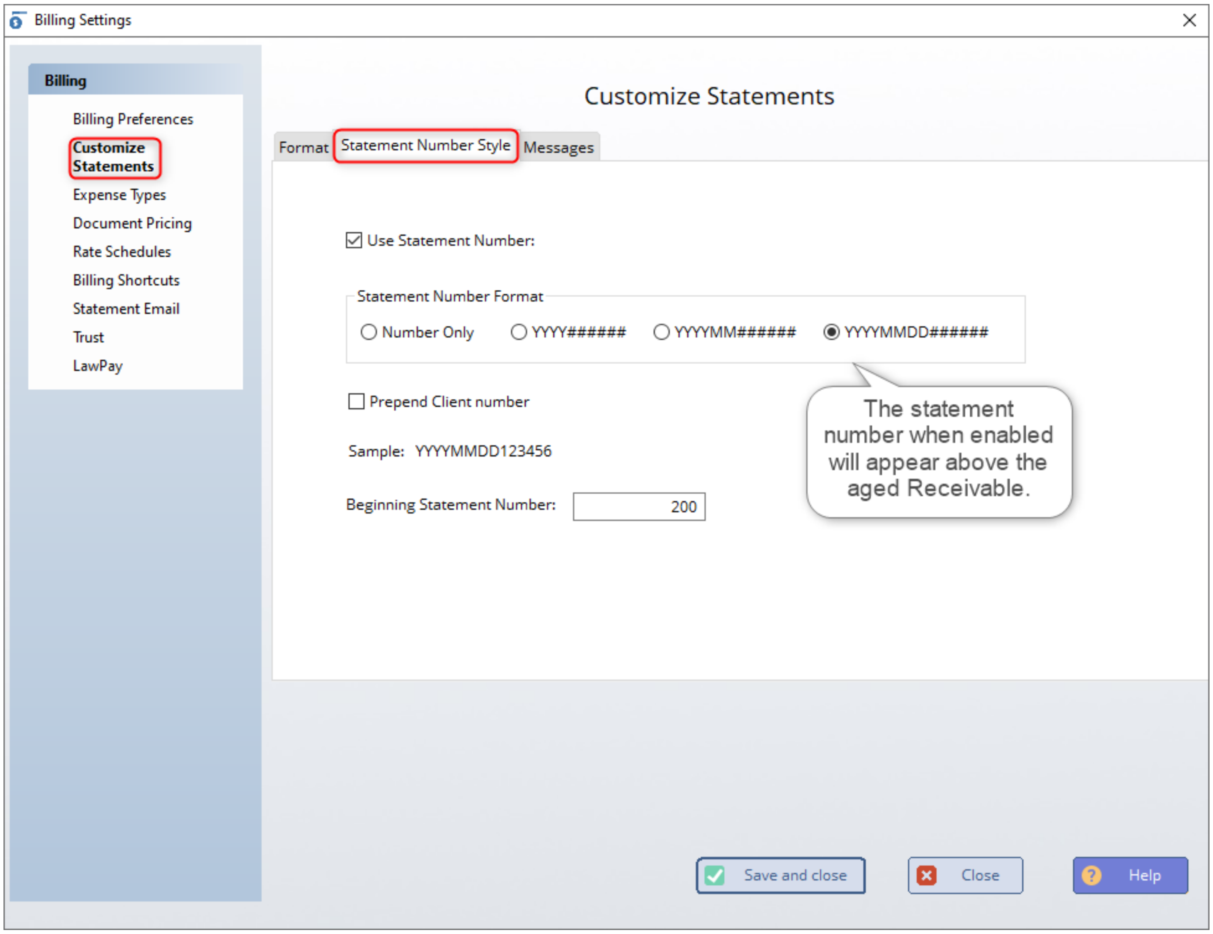
## Statement Number Style

This section lets you set up TXdocs to generate a unique number for every statement.

**Use Statement Number:** check this box to tell TXdocs to generate and print unique numbers for every statement

**Statement Number Format:** Select whether you want just a number or if you want TXdocs to prepend the current year/month/date to the number.

**Prepend Client number:** Select this if you use client numbers 22 and if you want TXdocs to prepend that to the statement number.

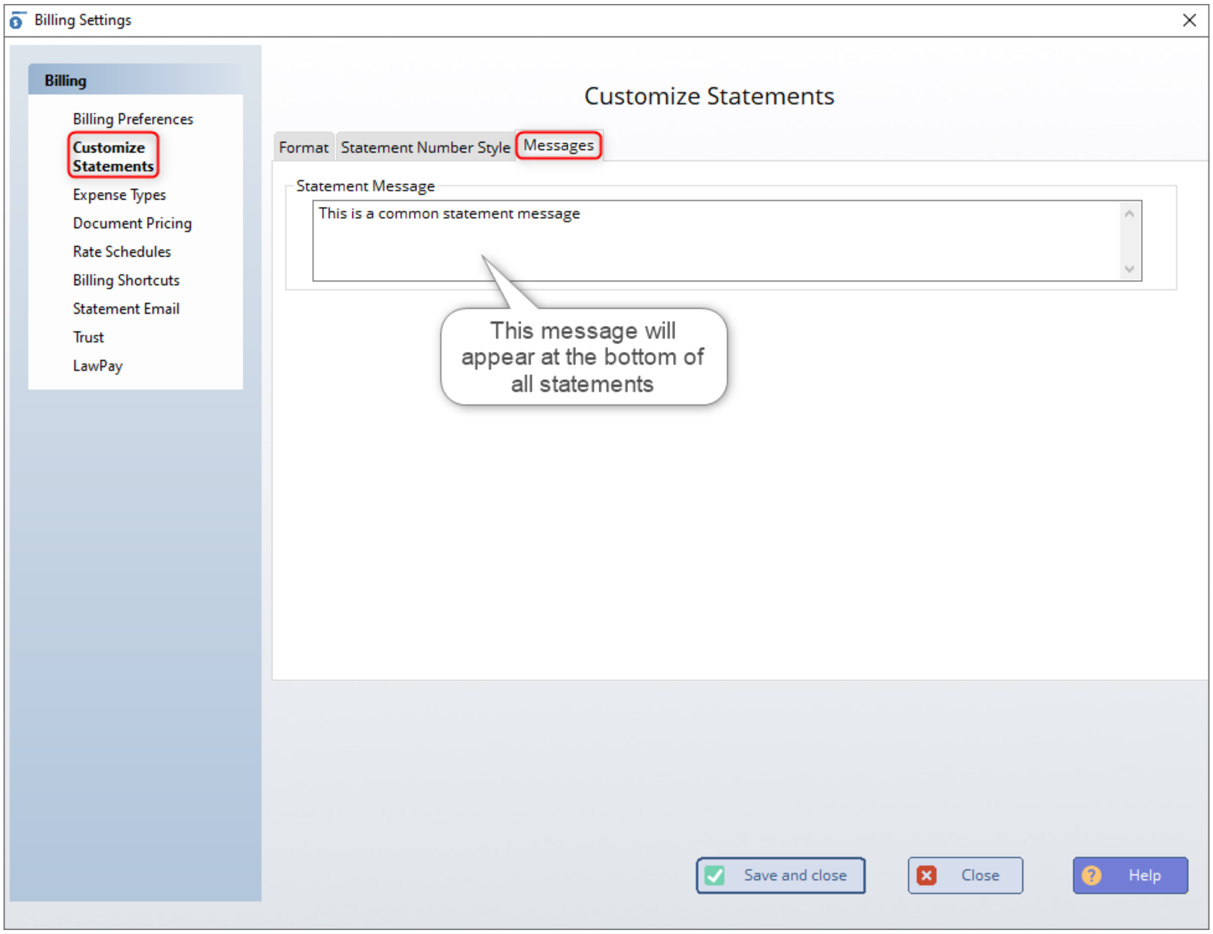



## Messages

**Statement Message:** Use this field to add a message to the bottom of your statements. The message will be added to all statements you generate until you change or delete the message.

**Statement email body:** If you selected Enable emailing statements 29 in Billing Preferences then this entry field is enabled. You can enter whatever message you want in the email that is generated for transmitting statements.

**Minimum Trust Message:** hen adding a new case to TXdocs, you have the option of setting a **Minimum trust balance** 35 for the case. When a case is below the minimum, then this message will be printed on the bottom of statements you generate.



### 3.2.3 Custom Design

Using the Statement Designer you can create custom headers for your billing statements. The **Header** tab is where you design a header to be printed at the top of the first page of each statement. The **Subsequent Header** tab is where you design what you want printed at the top of each subsequent page in a statement.

There are also quite a few options for customizing the body of your statements. For help on those options, see Customizing Statements
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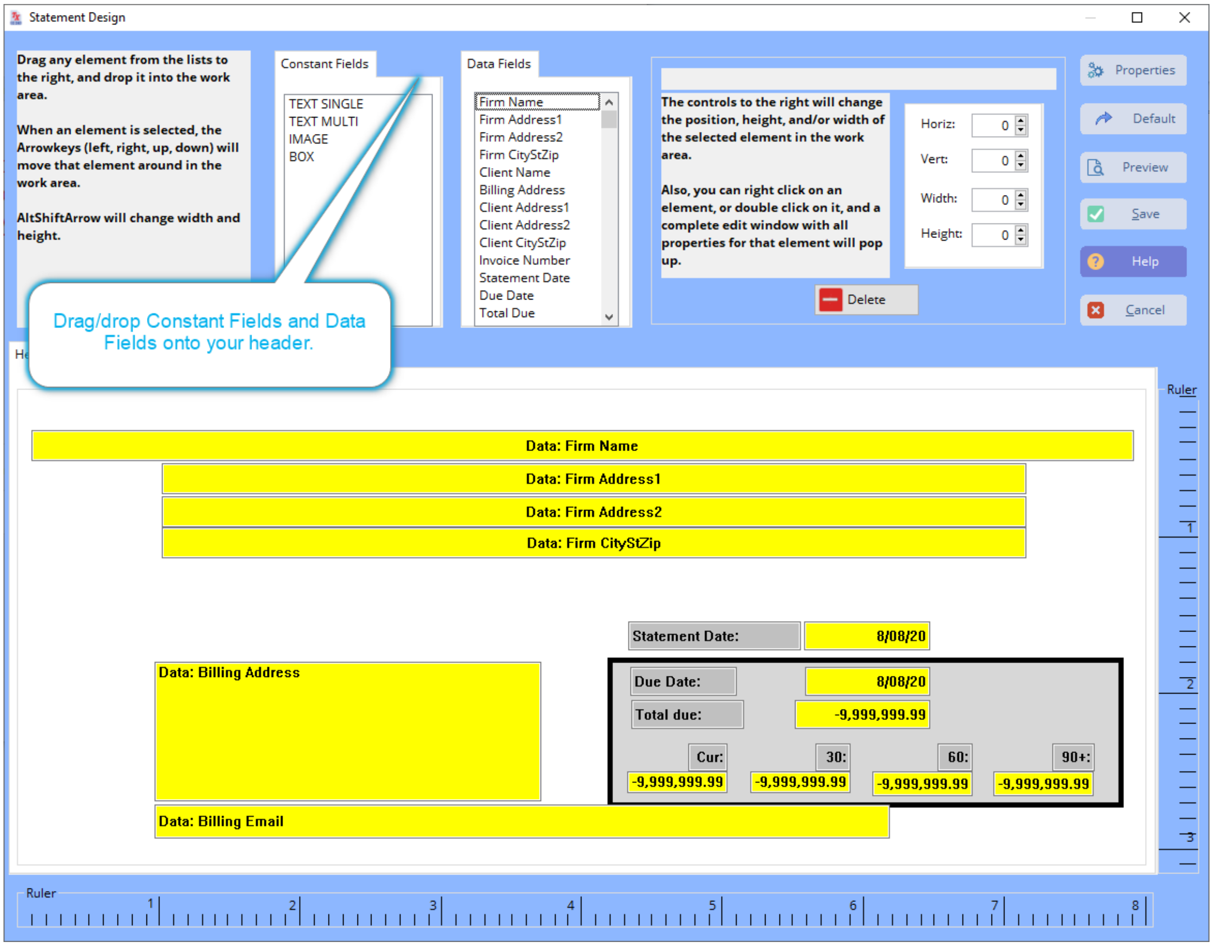



**Constant Fields:** These are fields where you supply information that does not change from statement to statement. For example, you can add an image that is your firm's logo. The **Image** is a constant field because it is the same regardless of who the statement is going to. A **Text Single** field is a single line entry field where you can enter text such as your firm's name. A **Text Multi** field is an entry field where you can enter text on multiple lines. A box field draws a box on your statement, usually to group fields together.

**Data Fields:** These are fields that are the opposite of constant fields. Data fields contain information that is obtained from TXdocs' databases. The client's billing email, the statement date, total due, etc. are data fields that are supplied by TXdocs from its databases. Firm name and address data fields come from the information supplied to TXdocs with your license file.

**To delete a field:** Right click on the field and choose Delete from the pop up window

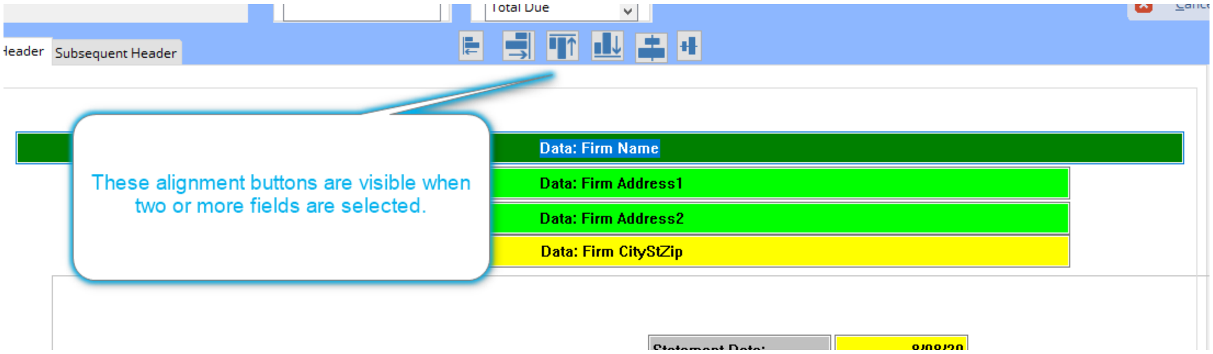
**To move a field:** Select the field and then press an arrow key (left, right, up, down) Alternatively, change the Horiz: or Vert: position in the entry fields at the upper right of the window.

**To change properties (posiition, size, color, font, etc.) of a control:** Double-click on any control and a Properties window will open where you can change most of the properties for a field.

**Selectng multiple fields:** You can select multiple fields at the same time by clicking on each of them **with your Ctrl key pressed** (Crtl+Mouseleft). Each field that you select in this way will turn a dark green color. The text color in the second and subsequent fields selected will be colored gray. If you click on a field that is not part of the selected group, then all of your selections will be cleared. If you Ctrl - click on a field that is already part of a group selection, then it will be removed from the group.

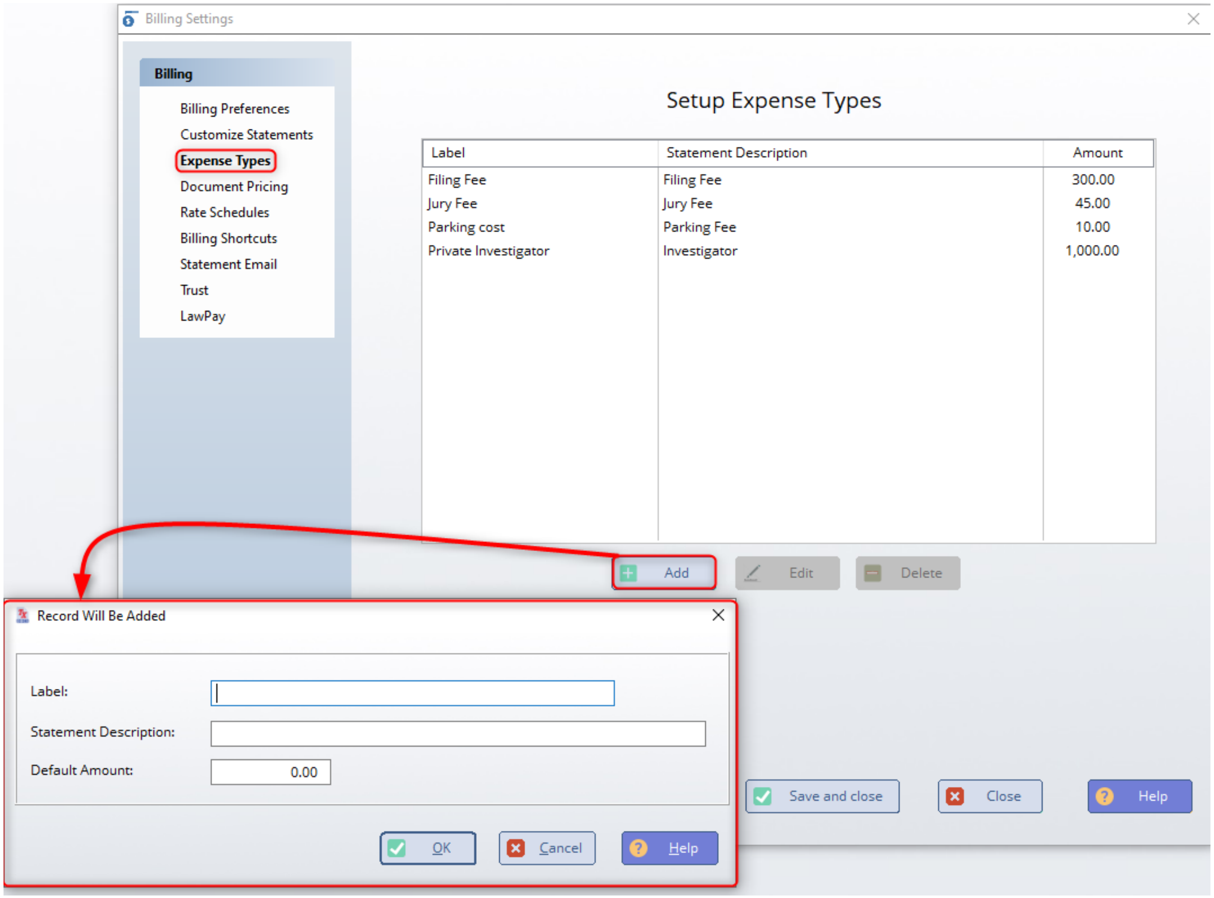
**Moving multiple fields:** After you select multiple fields as described above, you can move all of them at the same time with your arrow keys.

**Aligning multiple fields:** After you select multiple fields as described above, you can allign using the alignment buttons shown below. These buttons will appear when you have two or more fields selected. The first button you selected is the lead field and all the other selected fields will be aligned on it.



### 3.2.4 Expense Types

When you create an expense slip, you can select an Expense Type from a drop list on the form. You can organize and report expenses by type. Additionally, when you select a type for an expense slip, the statement description and default amount are automatically filled for you.



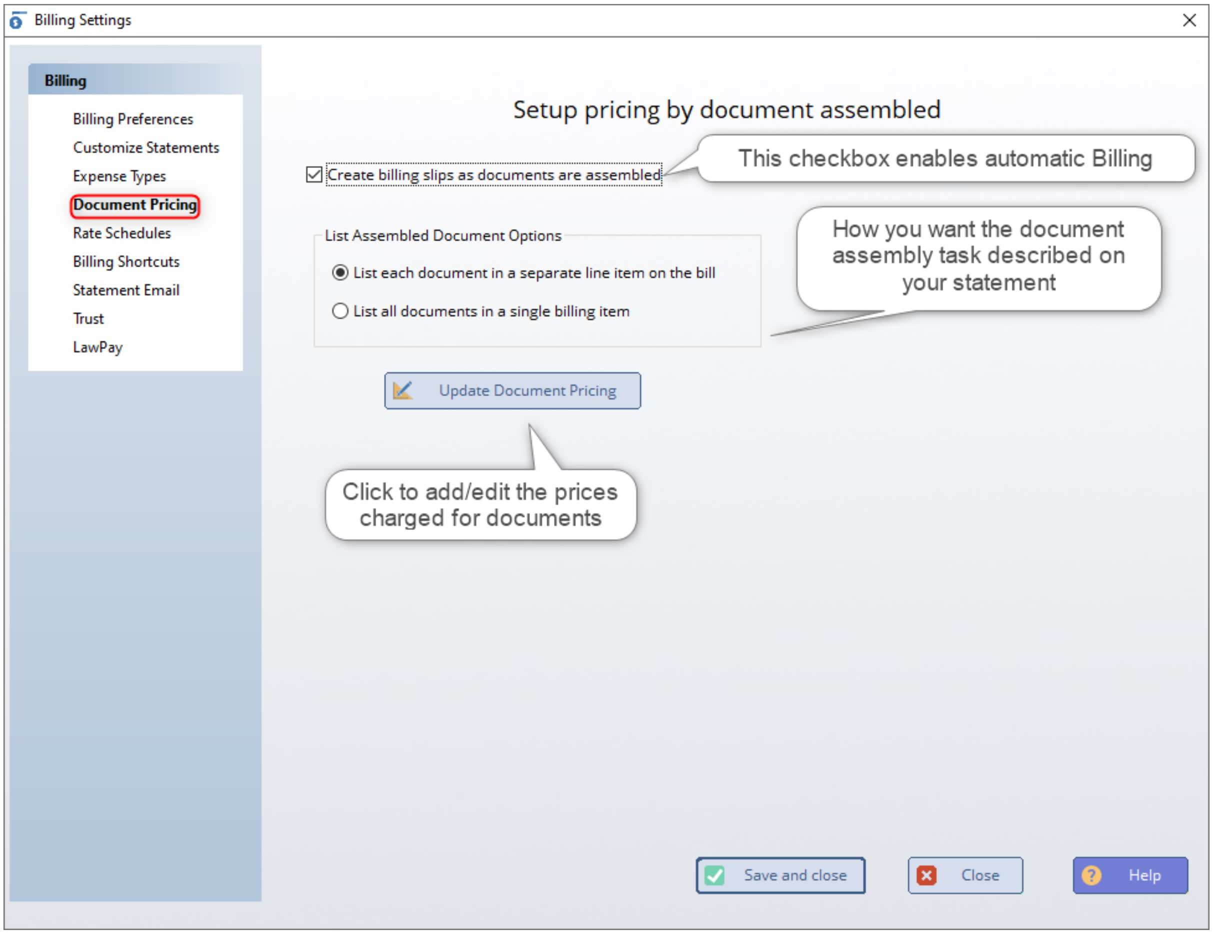

### 3.2.5 Document Pricing

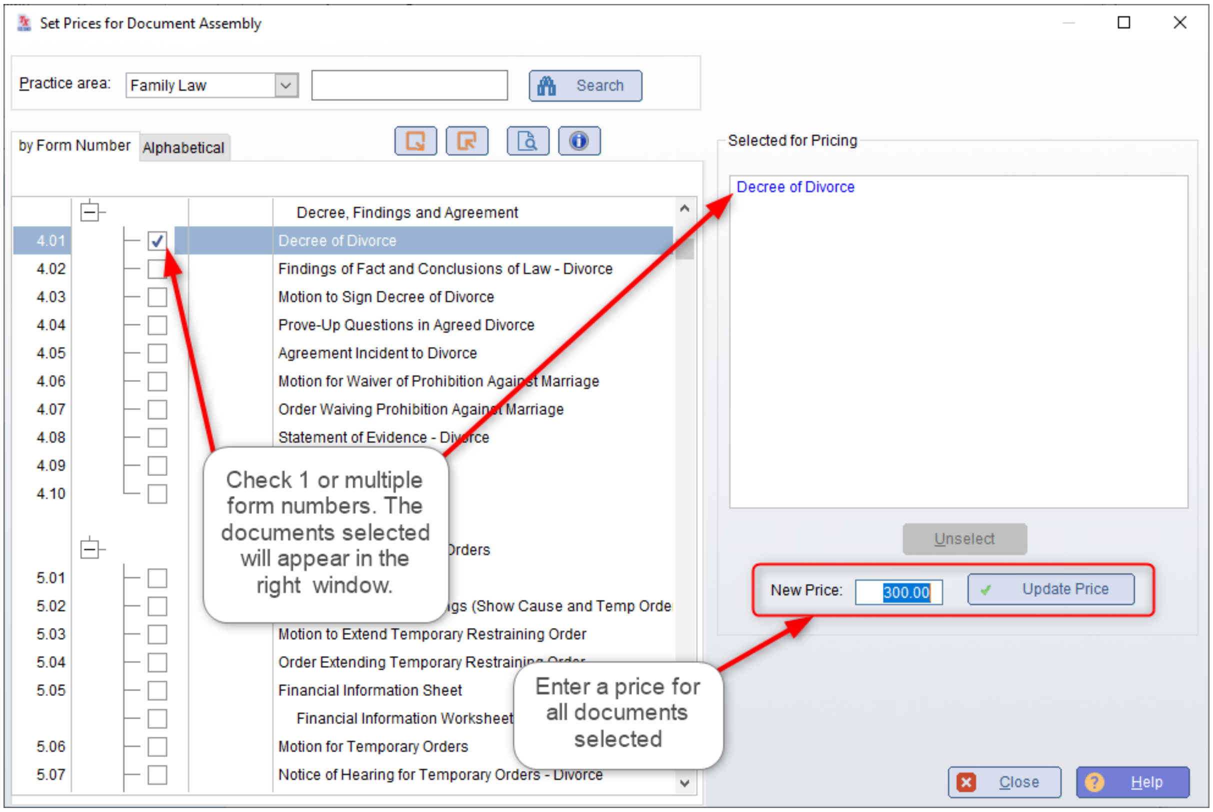
Many, if not most, attorneys choose to charge flat fees for most of the documents they prepare. For example, you might choose $125 to prepare a deed or $135 to prepare a standard motion to set. You can set up TXdocs to automatically prepare a time slip to bill for documents after you assemble them.

**Create billing slips as documents are assembled:** This checkbox enables this feature. If the box is checked, then every time after you have finished assembling documents, TXdocs will open a window for you to complete a time slip to bill for the work. If you have set a standard price for the document, that price will be prefilled.

**List Assembled Document Options:** You can elect to have all of the documents listed together in a single billing slip, with the prices totaled into a single charge, or you can elect to have each document separately listed as an item on the client's statement.

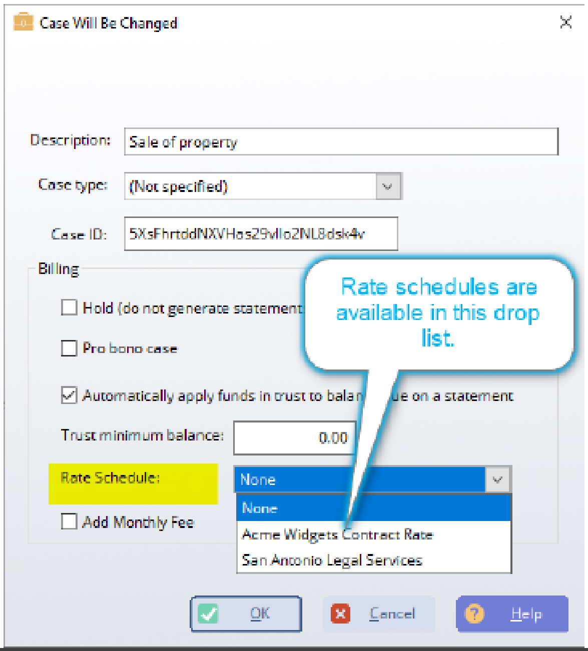
**Update Document Pricing:** Click this button the standard prices for documents. (If you do not set standard prices then you will fill in the price each time you assemble.

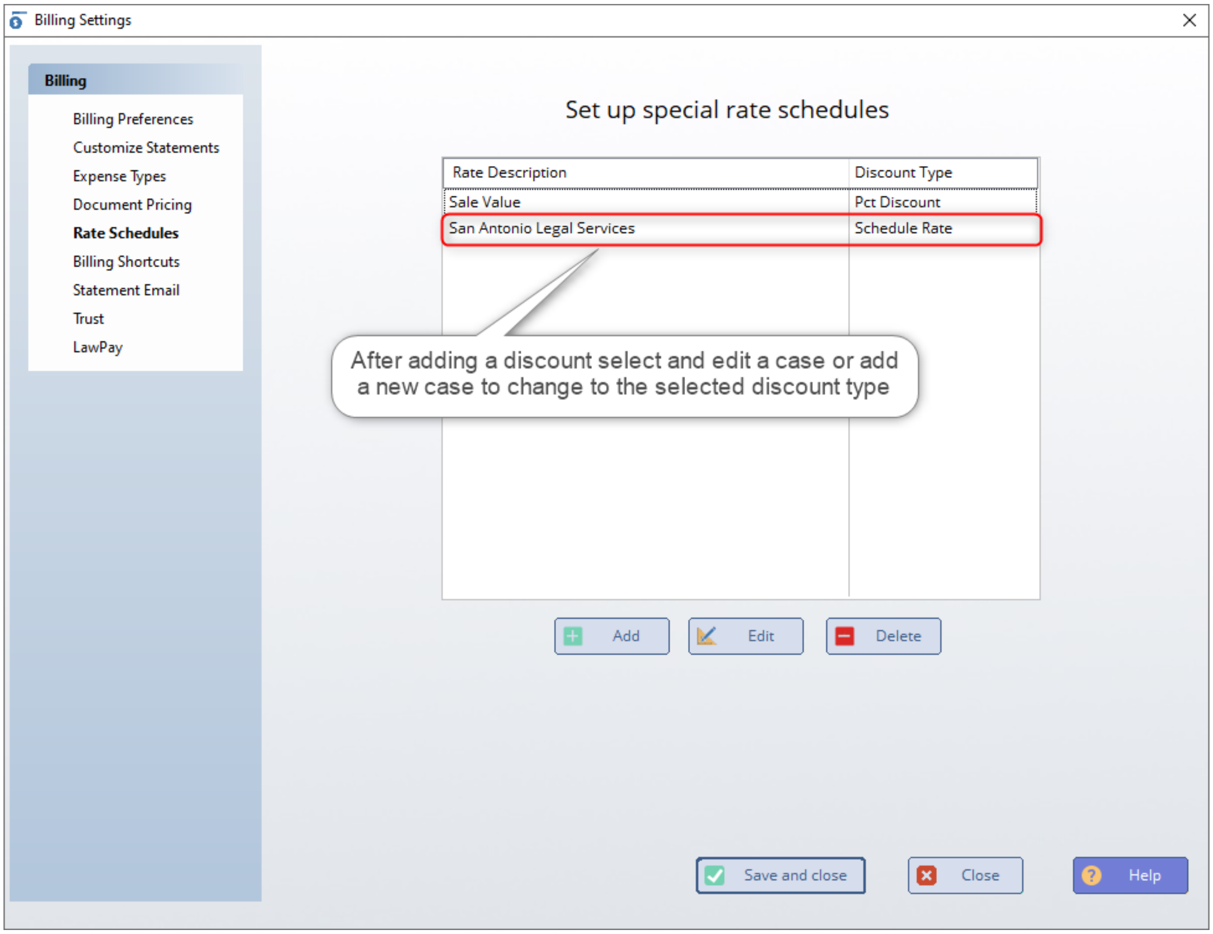




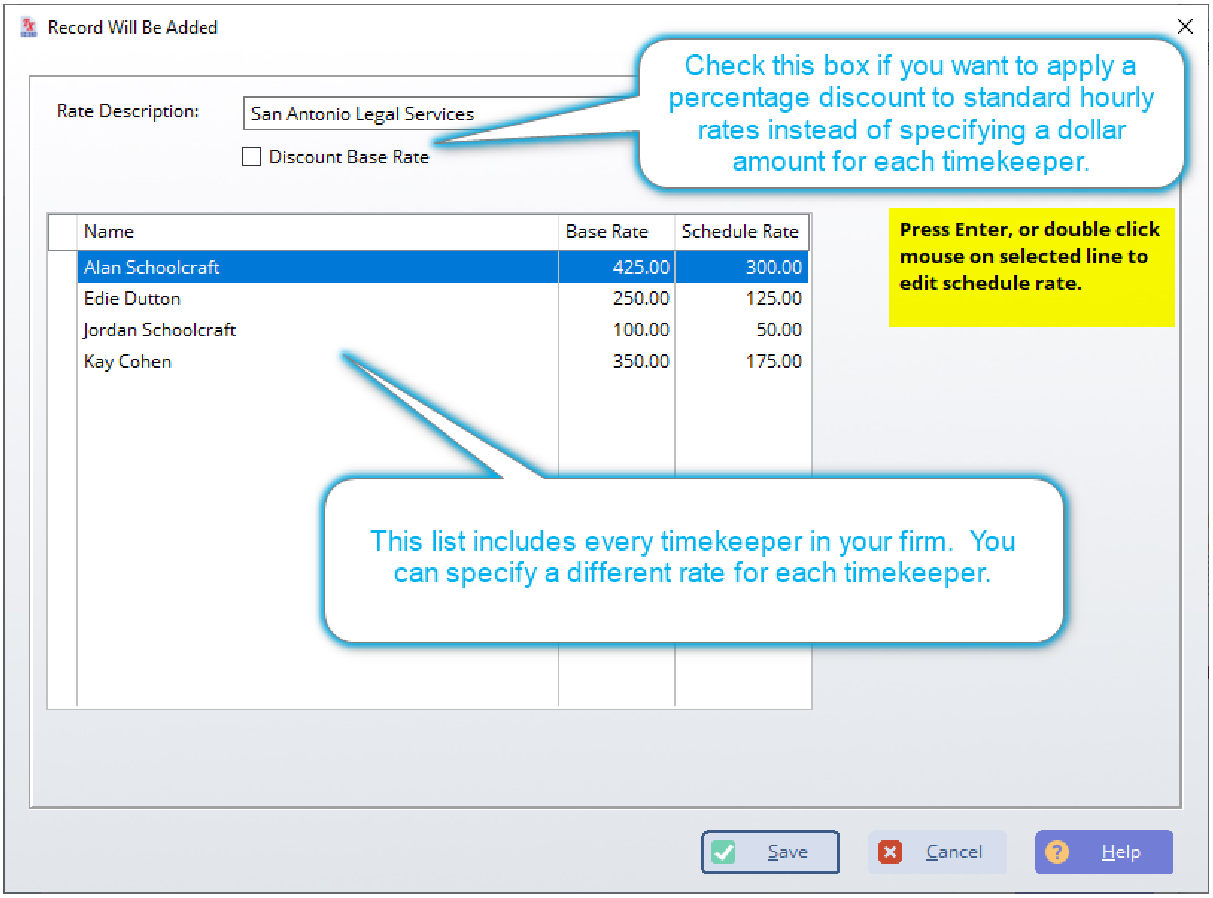

### 3.2.6 Rate Schedules

Sometimes you may agree to give clients billing rates that are different from your standard rates. Use Rate Schedules to set up different hourly rates that can be easily selected and applied to cases. If you select a rate schedule for a case, then the rates specified in the schedule will be applied instead of your standard rates.



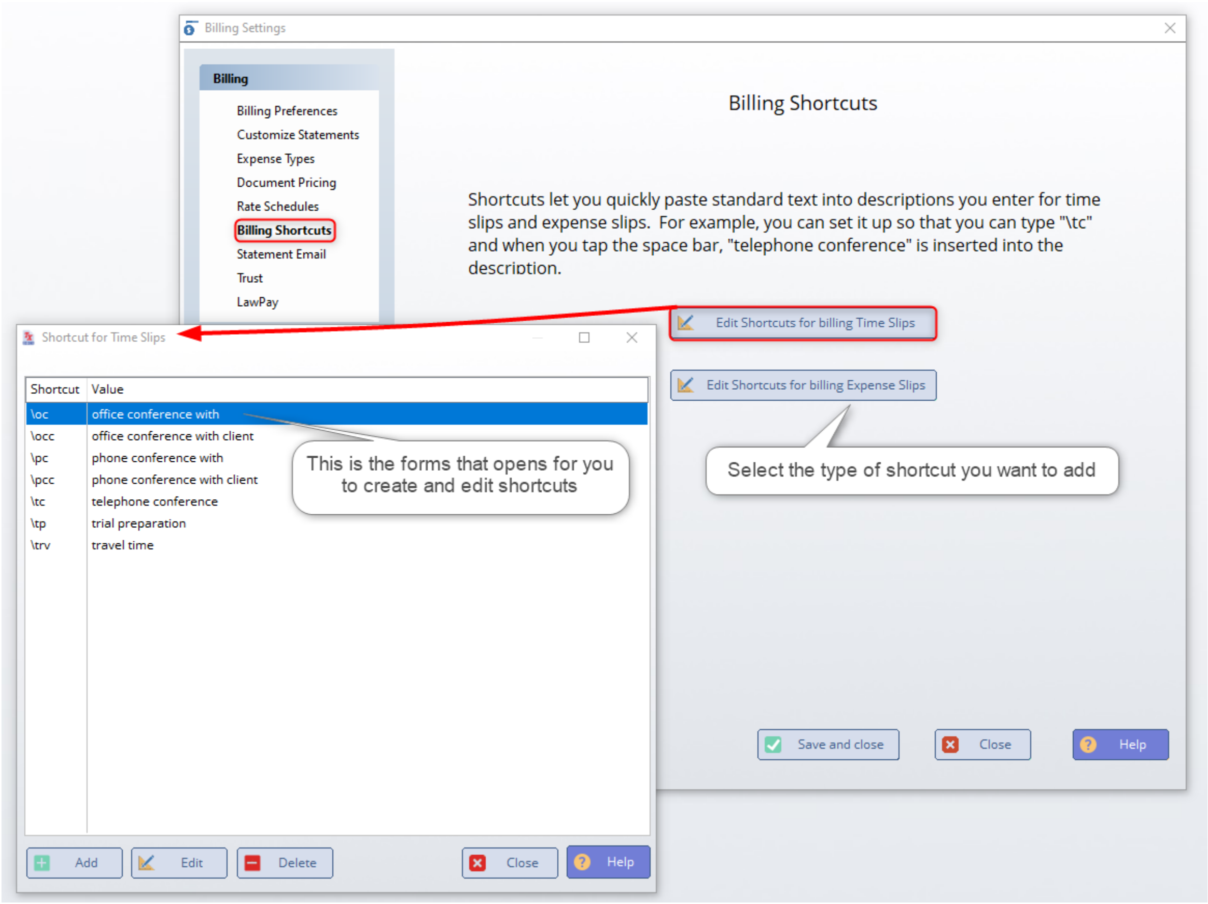

Billing Settings
Billing
Billing Preferences
Customize Statements
Expense Types
Document Pricing
Rate Schedules
Billing Shortcuts
Statement Email
Trust
LawPay
Set up special rate schedules
Rate Description
Discount Type
Sale Value
Pct Discount
San Antonio Legal Services
Schedule Rate
After adding a discount select and edit a case or add
a new case to change to the selected discount type
Add
Edit
Delete
Save and close
Close
Help




### 3.2.7 Billing Shortcuts

Shortcuts let you set up hotkeys to insert standard language when you are creating time slips or expense slips. For example, you could set up a shortcut of "/ff" that would insert "filing fee" into an expense slip that you are creating.




### 3.2.8 Billing Emails

If you want to send out your statement through an email then select this tab enable emailing statements. When enabled you can enter information into the the body of the email.

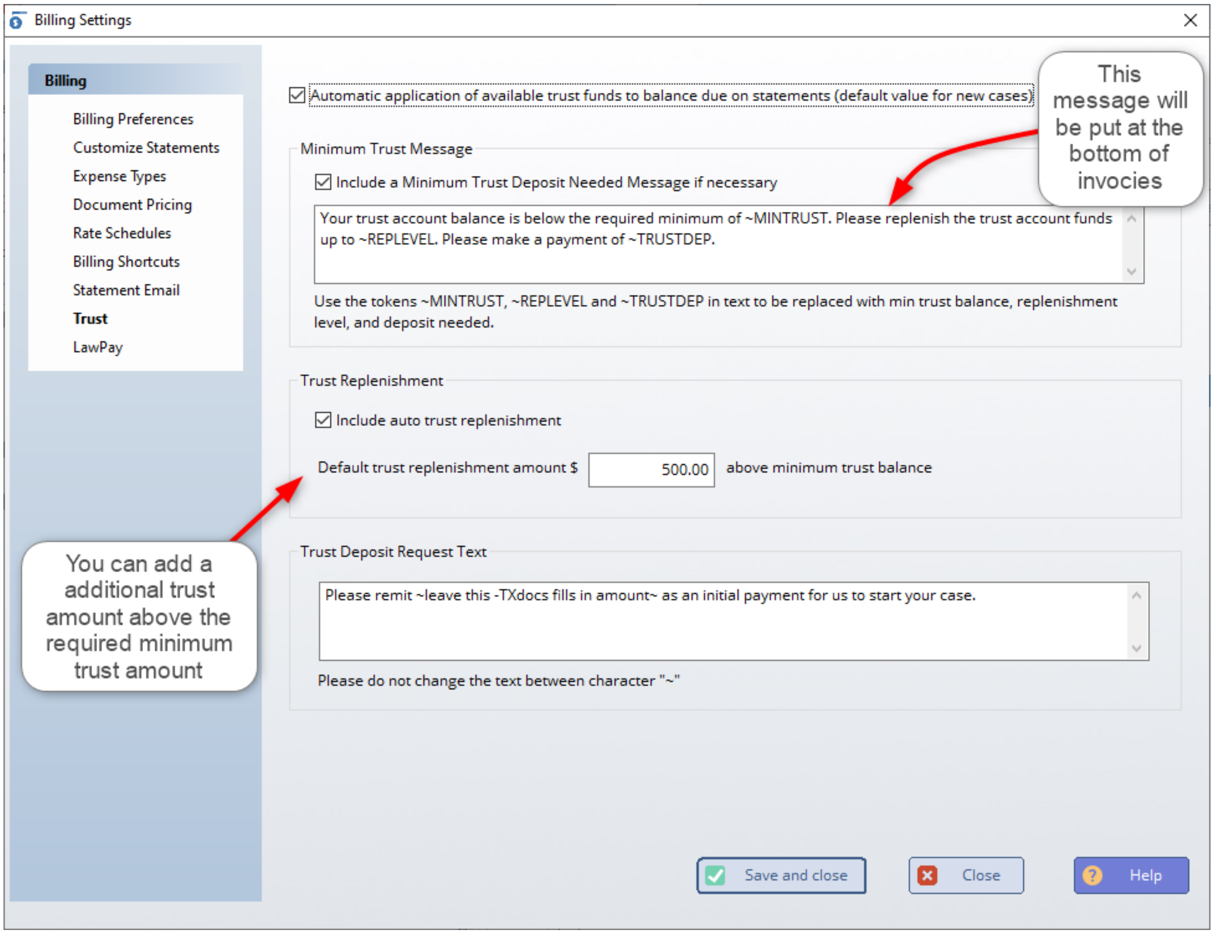
*Note* after you enable that you will allow statements to be emailed out you will need to make sure that the client has an email address for billing statements. To check this you will right click on the clients name in the contacts manager on the left side of TXdocs then click on edit client

### 3.2.9 Billing Trust

If you enable a minimum balance requirement on a clients case. You can add a message to the bottom of the users bill informing them that they need to replenish up to the minimum amount agreed upon.

Alternatively, you can enable to include auto trust replenishment which will ask a user who has a bill bellow the minimum agreed upon balance to refill the trust above the the minimum trust.

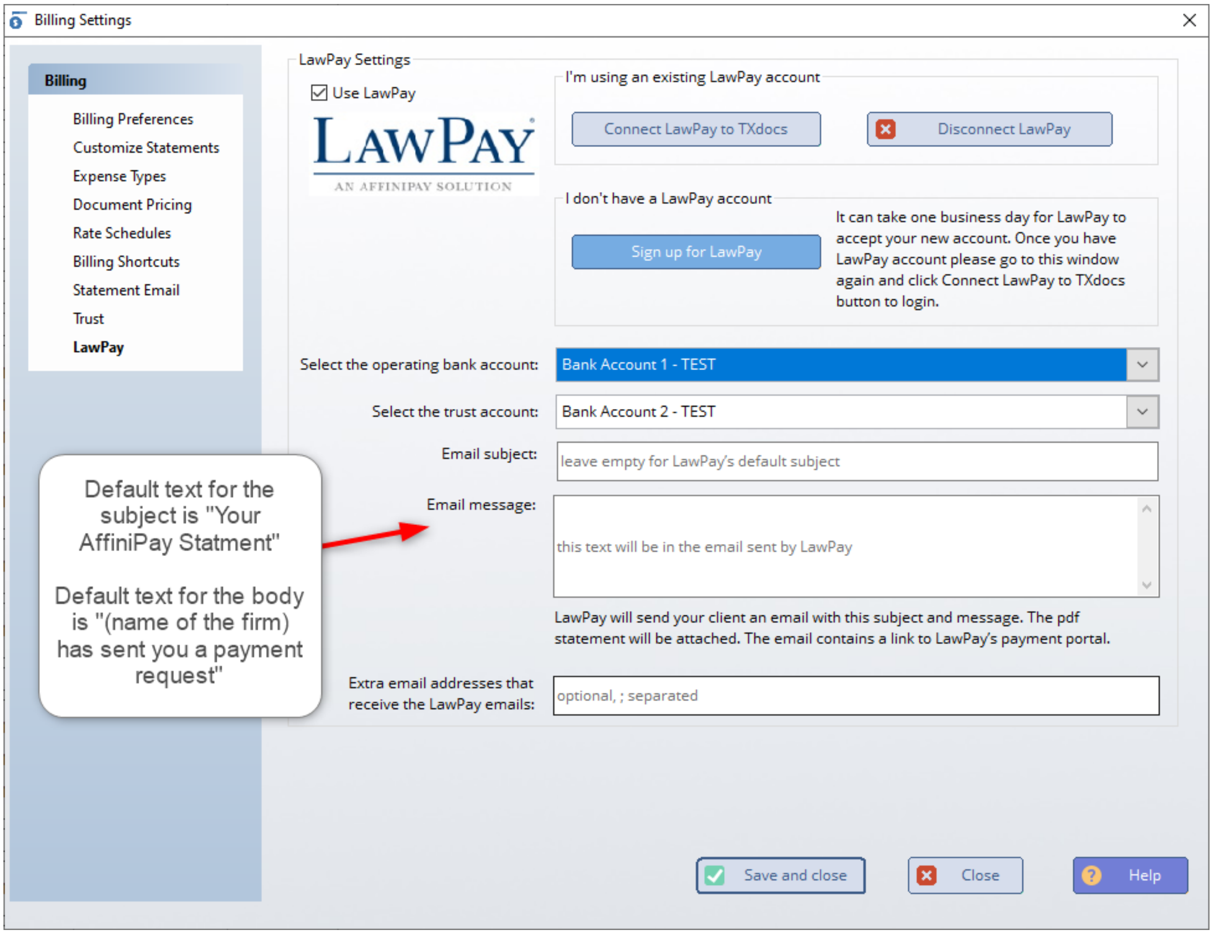
The last option allows you to customize the message sent out to the client when requesting a starting trust.




### 3.2.10 LawPay Integration

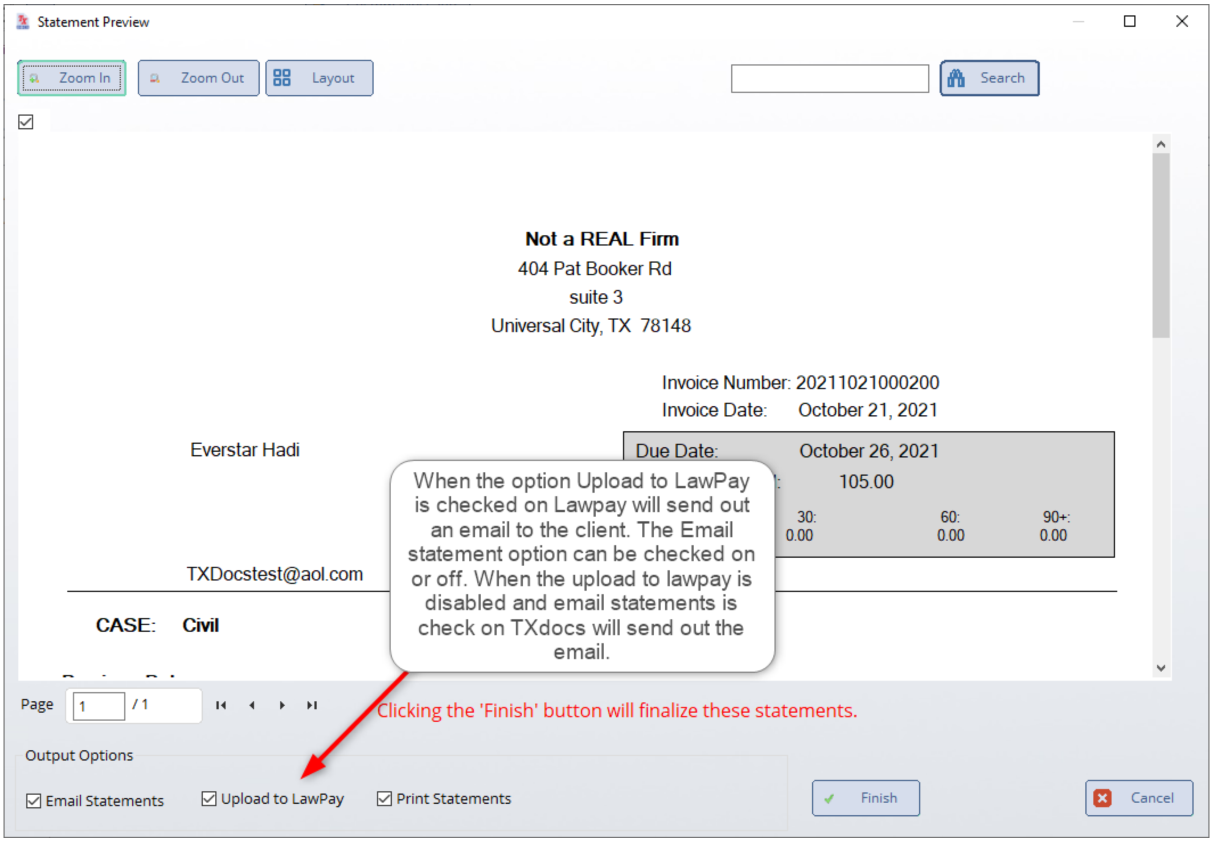
**Notice:** When setup, statements you create will be sent to LawPay. LawPay will be in charge of sending out emails to your clients. Txdocs will pull information form LawPay, but will not be able to assign previous statements or manually created invoices in LawPay to your client records.

**Setup:** To start using LawPay with TXdocs navigate to Settings at the top of TXdocs and select Billing settings. On the billing settings window please select LawPay from the list on the left and then click on the checkbox use LawPay. You will be asked to connected to your LawPay account. If you don't have a LawPay account you can set one up here, but it make take up to one business day for LawPay to initiate. After connecting to your LawPay account please select which billing account you are using for operating and trust account. Take some time to change the email setting or leave them blank to use LawPay's default email template. Press Save and close when done.




**Changes:** When you open up the Billing Manager window 2 new items will be added to the left side Invoices & Payments. TXdocs no longer handles sending out your bills instead your bills will be uploaded to

LawPay, and will be sent out through their system. To ensure that a client will be emailed please ensure that the client has a billing email (see for details). When creating a statement in TXdocs (single, consolidated, monthly) TXdocs will now have the option to upload the Bill to LawPay. Clicking on this button will upload the statement to LawPay's system and they will send out the bill. **Note:** If you need to retract the invoice sent out to the client you can go to the account details tab and click on the option delete from LawPay or undo statement. We will remove the item from LawPay unless the invoice has already been payed by the client. If that is the case you can refund within LawPay's system or You can add a credit to the users next bill.




**Invoices:** This tab pulls the information from LawPay's Quick Bills info. This will show you how long a bill has been out for, the status of the bill, creation time, amount due, and the client attached to the invoice (if created in TXdocs).

**Payments:** The payments window shows you clients who have paid through LawPay. When a client makes a payment the window is updated with the name of the time paid, name of the user (if created in TXdocs), amount due, and an authorized message. Authorized means that the payment is in LawPay's system, completed means that during LawPay's nightly run they have marked the payment as processed. TXdocs allows you to then import your bill into your operating account. Click on a completed payment then click on one of the buttons at the bottom of the screen "Import highlighted Payments". **Note:** If you are dealing with a trust you will need to move the money into the trust account manually and then click on the checkbox saying you did so manually before clicking on complete in TXdocs.

## 3.3 Personal Settings

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

### 3.3.1 General Personal Settings

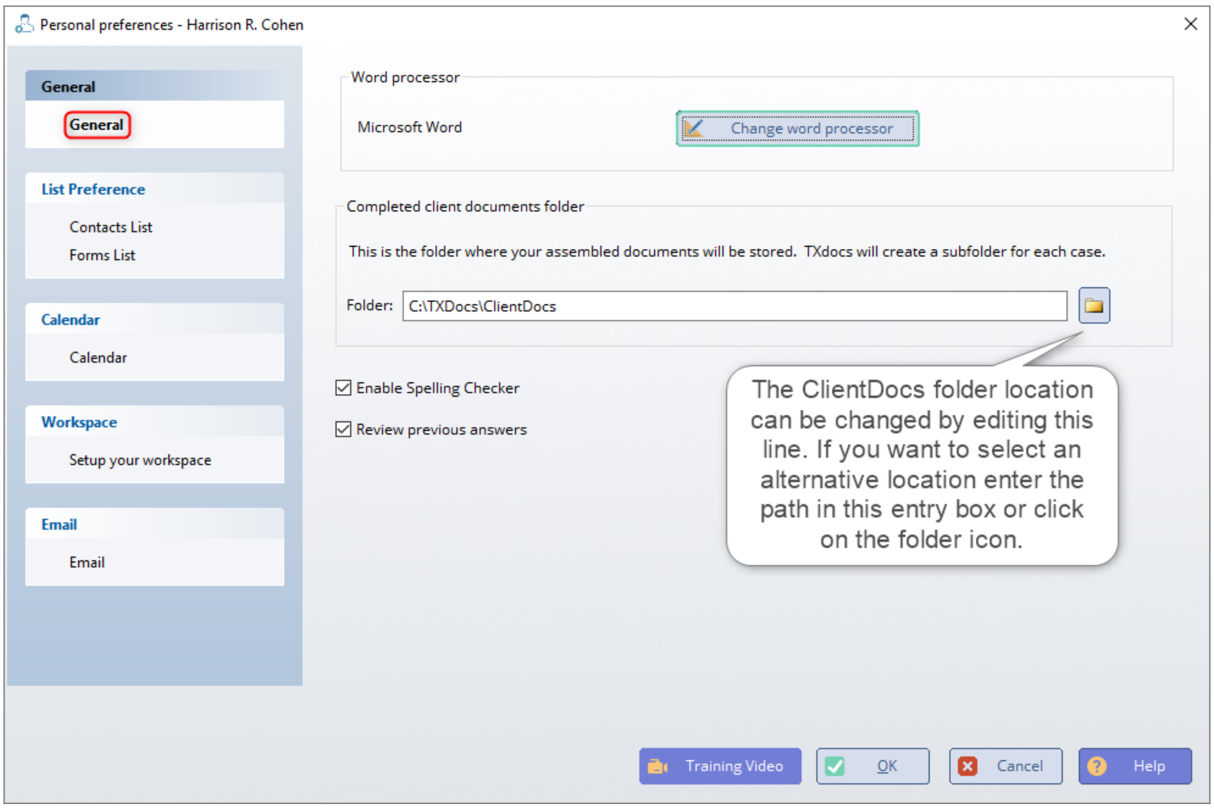
**Word processor:** TXdocs works with Microsoft Word, Corel WordPerfect or the free word processor - OpenOffice. If you are using TXdocs Anywhere (our internet version) you will also be able to choose Word 365. It is important to select the correct word processor because TXdocs makes many formatting adjustments to meet the requirements of the different word processors.

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

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

**Review previous answers:** If you select a case before you begin assembling documents, at the end of the assembly session TXdocs saves all the answers you entered. In that case when you are assembling more documents at a later date, TXdocs will show your prior answers so that you don't have to retype them. If you unselect this option, then TXdocs will skip right over any questions with previous answers rather than just displaying those previous answers.

Telling TXdocs to not review previous answers can be an additional time saver.  The disadvantage of not reviewing previous answers is that you will not see those answers if you want to change them.  If you uncheck this box to not review previous answers, you will still have the option of telling TXdocs to review previous answers as you begin a document assembly session.



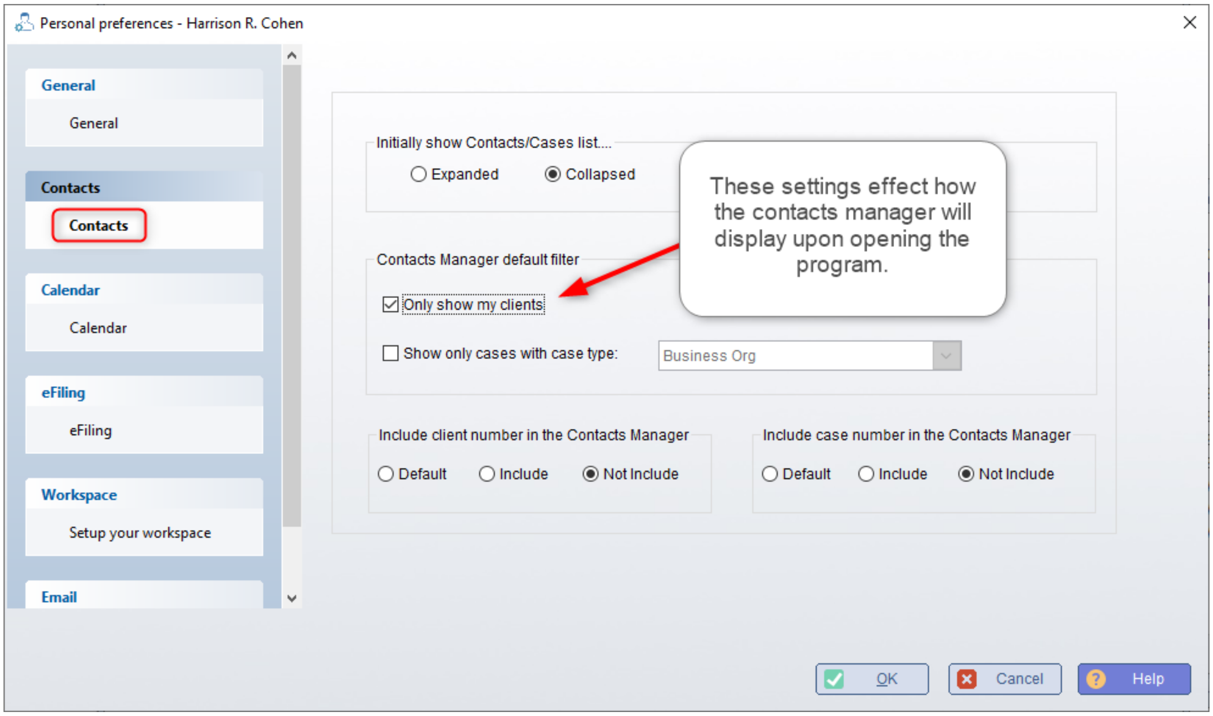

### 3.3.2 Contacts and Forms

**Initially show Contacts/Cases list....** Your clients and cases are displayed in what is called a tree structure.  That is, the clients are displayed on a line and then all of the cases related to that client are shown on indented lines below the client.  You can click on a "+" or "-" to show (expand) and hide (collapse) the cases.  If you have hundreds or thousands or clients and cases then it is much more efficient to collapse the tree (hide the cases) so that you can more quickly scroll or jump to the client and then expand the client to see the related cases.  The setting here just tells TXdocs how you want that client/case tree to be displayed when TXdocs first opens.

**Contacts manager default filter:** In TXdocs we often refer to "Contacts" and "Clients" interchangeably. But there is a difference: Clients have cases in the system whereas Contacts are just persons or entities for whom you want to store contact information such phone numbers and addresses.

**Only show my clients:** When this is checked, then TXdocs will initially only show clients and the contacts will be filtered out.

**Show only cases with case type:** In Firm Settings you can set up case types for organizing your cases. This setting tells TXdocs that initially you only want to see cases of a particular type.



### 3.3.3 Calendar

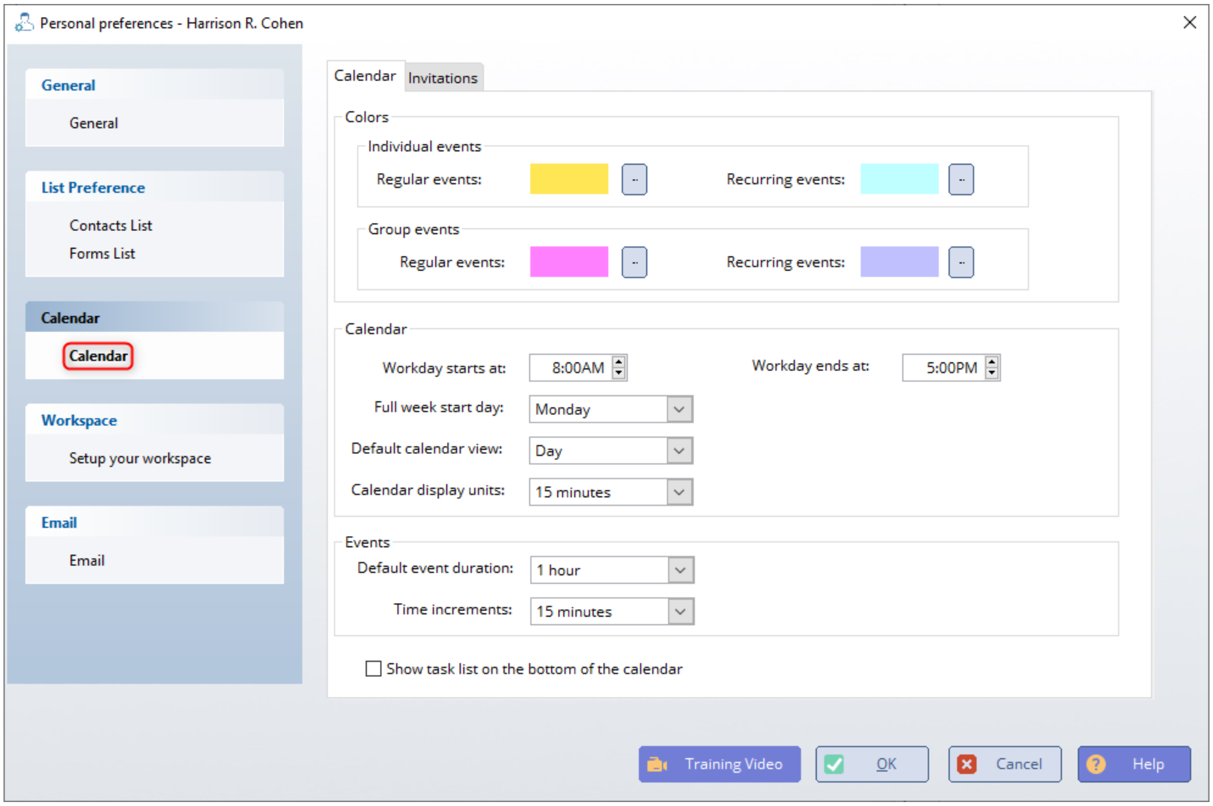
**Colors:** Colors are intended to help you know what kind of event is on the calendar from just a quick glance. Individual events are those events that are for the specific single timekeeper. Group events are events that involve two or more timekeepers. If you are viewing more than one calendar at the same time, the colors for each timekeeper will help you see which event is for which timekeeper.

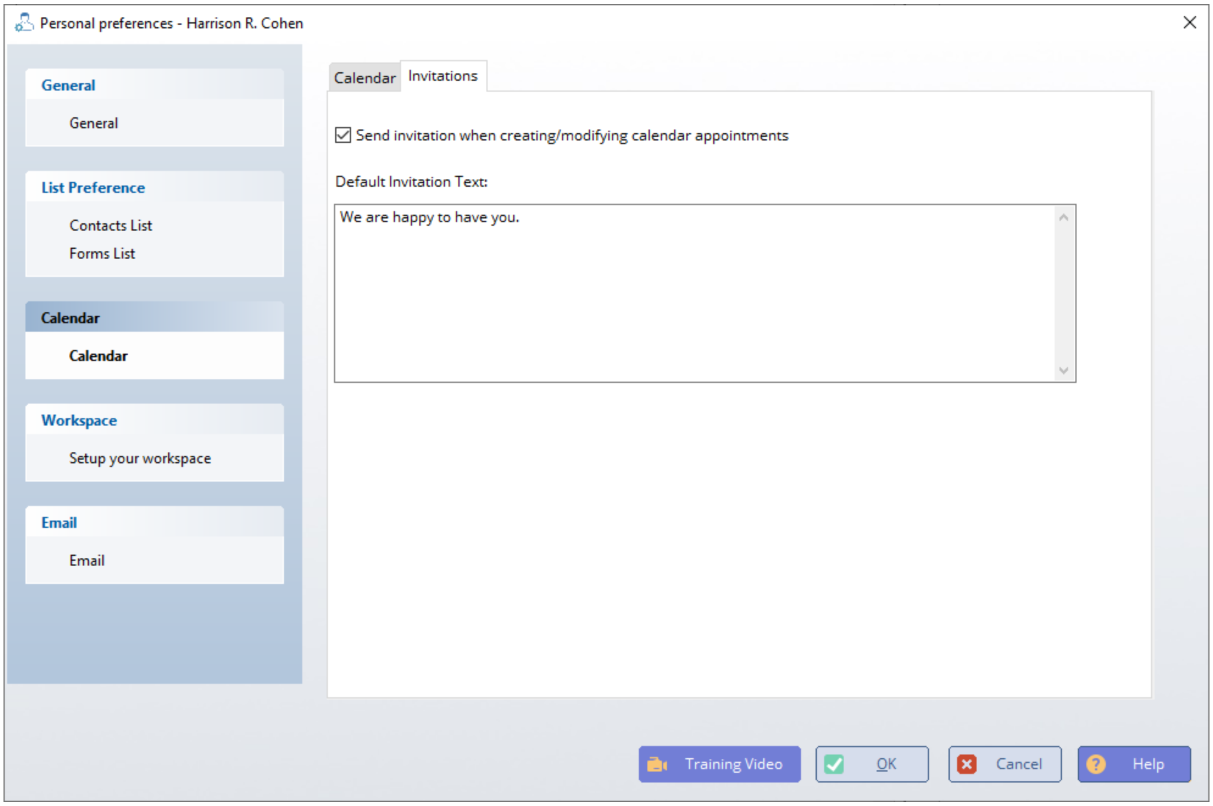
**Calendar:** This section is where you tell TXdocs how you want the calendar information displayed. Generally, all events for the entire day for every day of the week can not be displayed at the same time. So, your settings here determine what is visible on the calendar when it first opens. Then, when you want to see events that are not currently visible you can scroll through the day or select a different view.

**Events:** These are default settings for when you create a new event.

**Show task list on the bottom of the calendar:** This feature is an option so that you can determine what best fits on your screen. For a small screen, you would leave this unchecked but if you have a larger screen you may decide to leave this list visible.

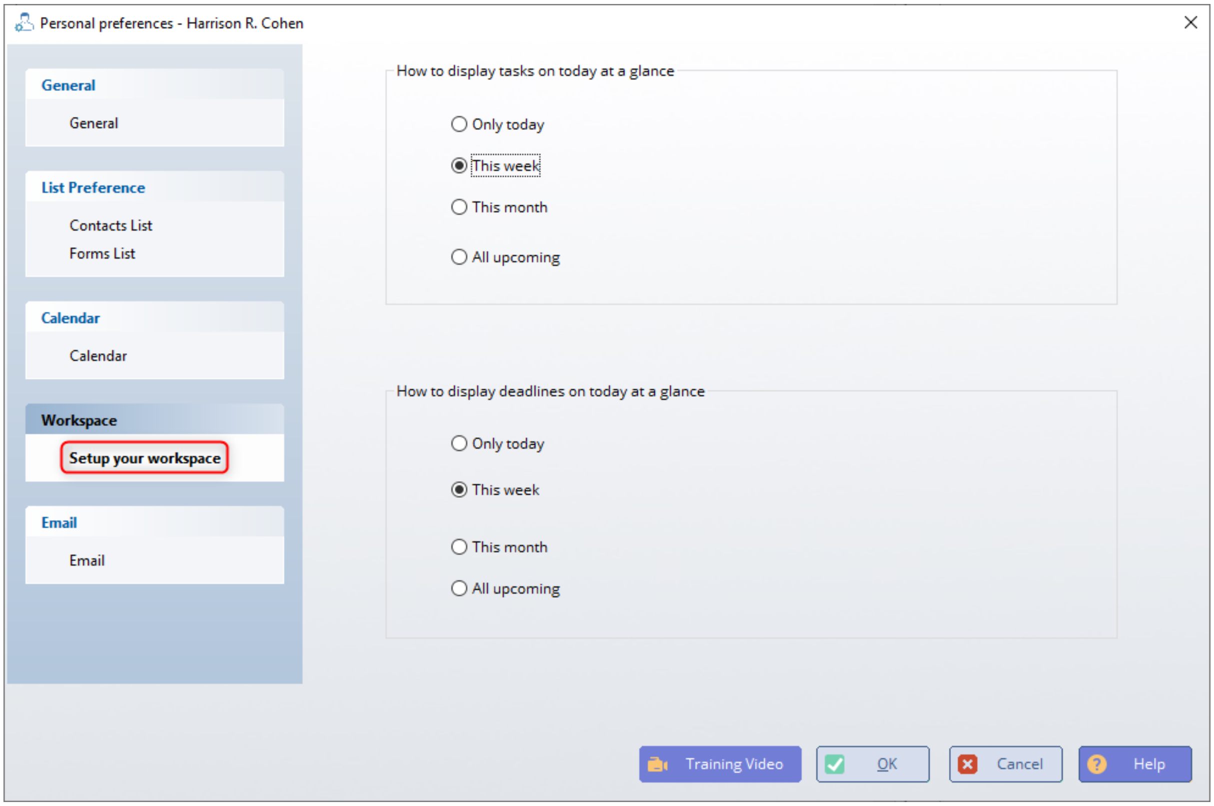
**Invitations:** On this tab you can enable the invitations feature whereby you can send invitations to people when you add an event to the calendar.


Personal preferences - Harrison R. Cohen
General
General
List Preference
Contacts List
Forms List
Calendar
Calendar
Workspace
Setup your workspace
Email
Email
Calendar
Invitations
Colors
Individual events
Regular events:
Recurring events:
Group events
Regular events:
Recurring events:
Calendar
Workday starts at:
8:00AM
Workday ends at:
5:00PM
Full week start day:
Monday
Default calendar view:
Day
Calendar display units:
15 minutes
Events
Default event duration:
1 hour
Time increments:
15 minutes
Show task list on the bottom of the calendar
Training Video
OK
Cancel
Help


Personal preferences - Harrison R. Cohen
General
General
List Preference
Contacts List
Forms List
Calendar
Calendar
Workspace
Setup your workspace
Email
Email
Calendar
Invitations
Send invitation when creating/modifying calendar appointments
Default Invitation Text:
We are happy to have you.
Training Video
OK
Cancel
Help

### 3.3.4 Workspace

TXdocs has three small panes that are attached to the right side of your TXdocs workspace. These panes show your appointments, tasks/deadlines and phoneslips. Here you can select what information you want displayed in those panes. NOTE: On the ribbon bar under Settings, there are checkboxes where you can tell TXdocs that you do not want these panes displayed.



### 3.3.5 SetupPersonalEmail

In TXdocs' Contacts Manager and Case Manager there are many places that display email addresses for your contacts that are in TXdocs. There is usually a button next to that email address that will let you quickly and easily send an email to that person. And, if you have a case selected, TXdocs will automatically save a copy of that email in the Case Manager for that case. Of course, none of this is possible unless you give TXdocs the setup information it needs to handle email. There are two ways to set up email: (1) Here, in Personal Settings, you can enable TXdocs' integration with Microsoft Outlook; or in Firm Settings you can set up TXdocs to use SMTP email service 64.

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

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

When you enable TXdocs' Outlook integration, it tells TXdocs to send all email from you through your Outlook. This means those emails will be available to you in your Outlook Outbox and Sent box. Additionally, enabling this feature causes TXdocs' Email Manager 177 to now be available to you on the ribbon bar Practice Management tab.

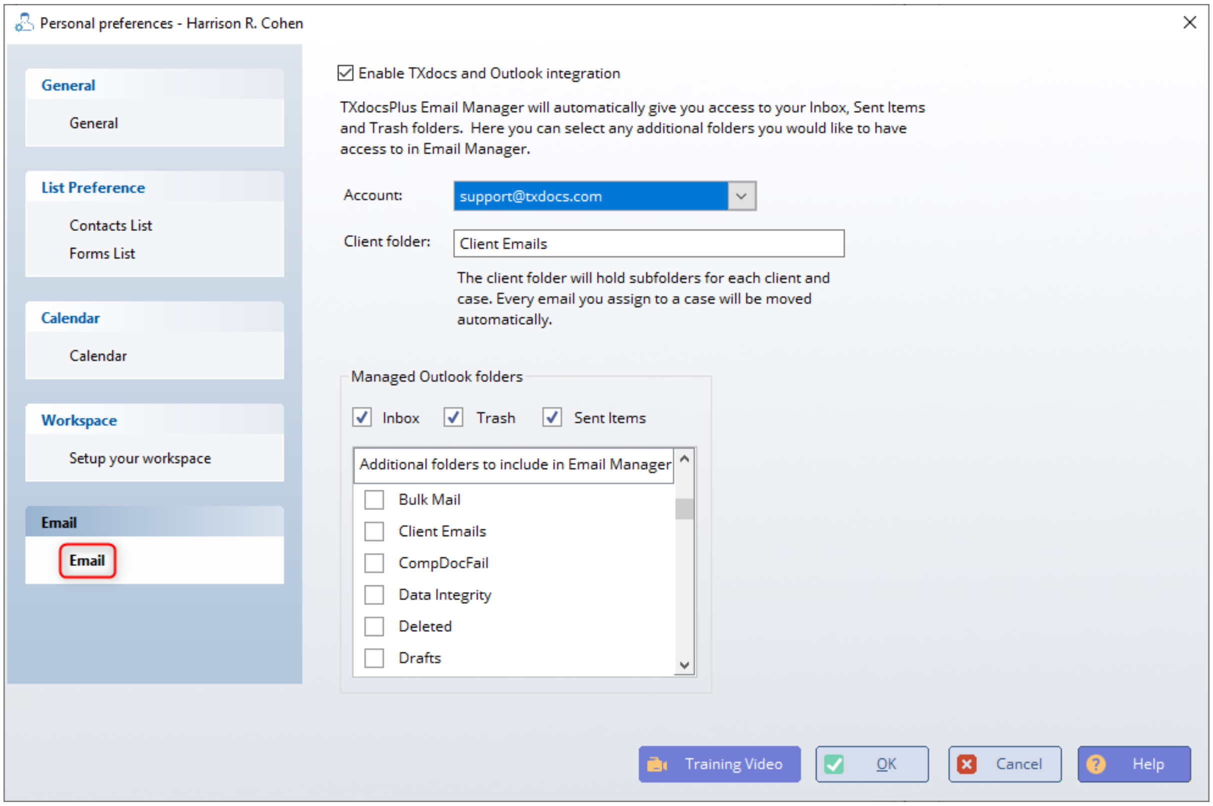
TXdocs Email Manager gives you the ability to drag emails that are received through Outlook and then drop them onto cases. When you drop an email on a case, TXdocs creates a copy of the email and stores it with the case. In Case Manager, there is a tab where you can view all emails that were received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

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

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

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

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



## 3.4 System Settings

### 3.4.1 Backup Options

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

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

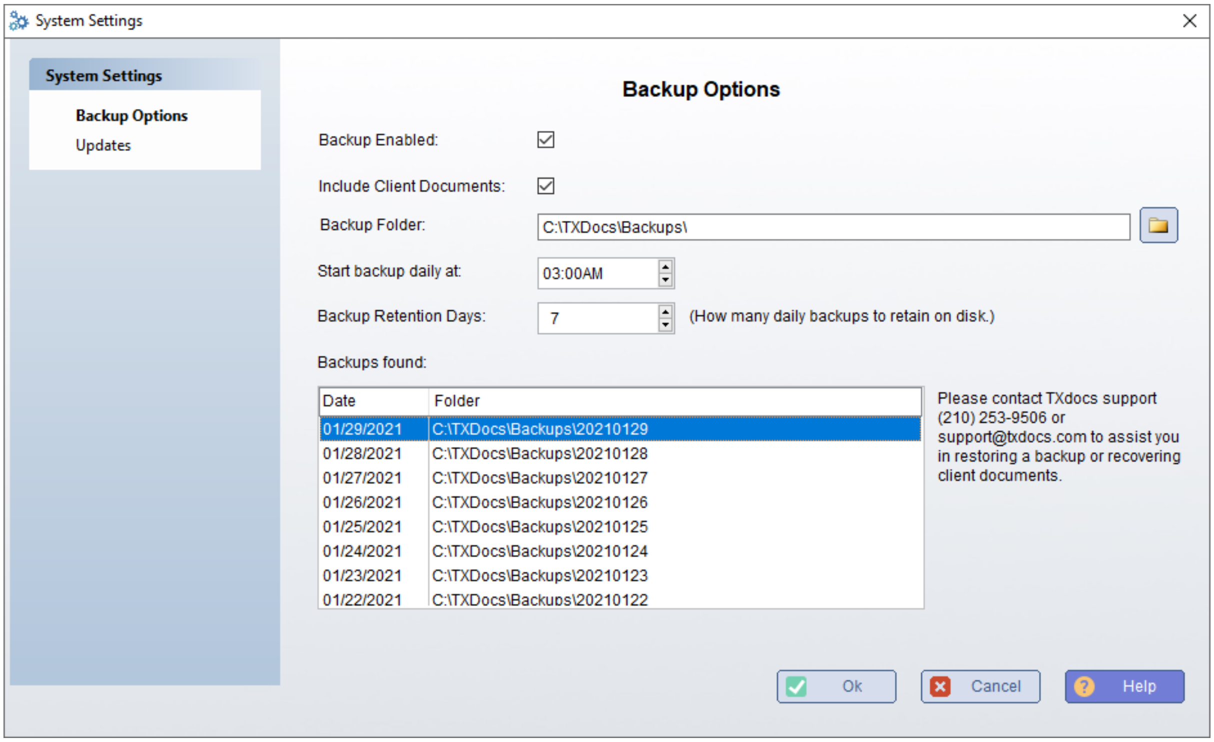
**Backup Folder:** Tell TXdocs where you want your backup files stored.

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

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

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

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




### 3.4.2 Security

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

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

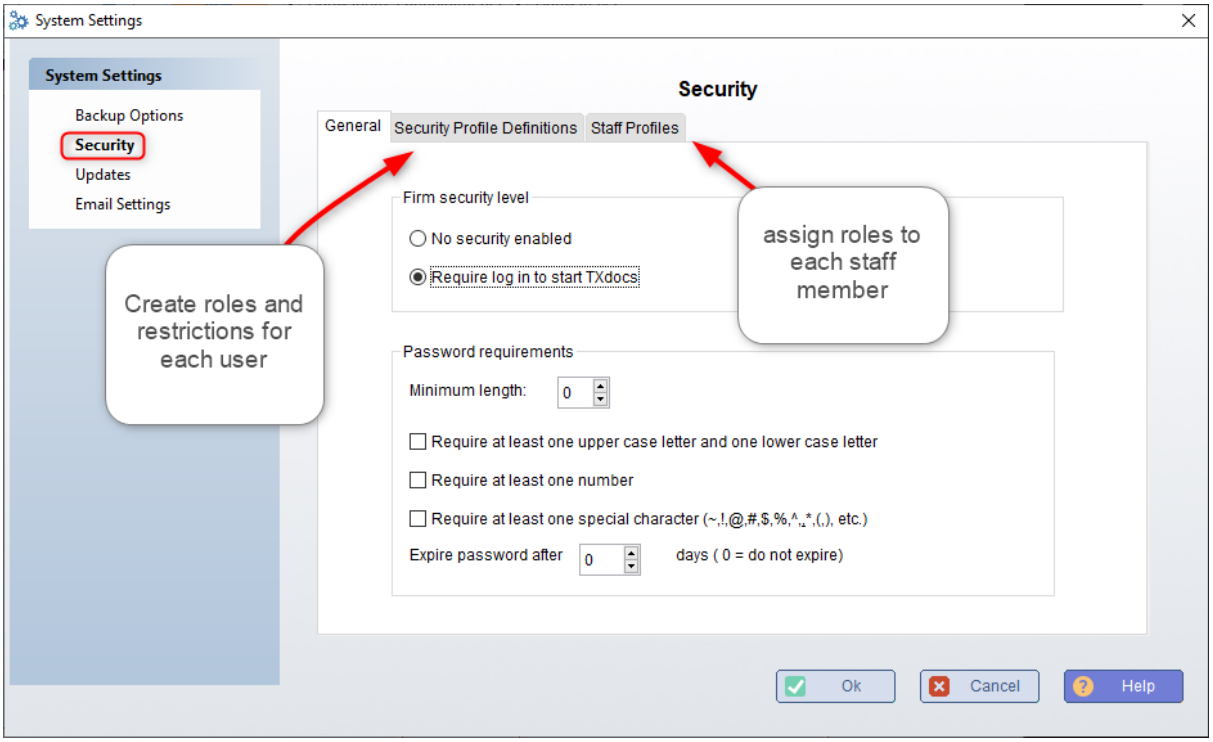
**Security Profile Definitions:** This table lets you add roles for your staff members. You can break up a users roll in 4 sections general features such as allow access to the calendar, case manager, and cws. To edit features, system and firm settings, and lastly billing features.

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

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

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

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



### 3.4.3 Updates

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

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

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

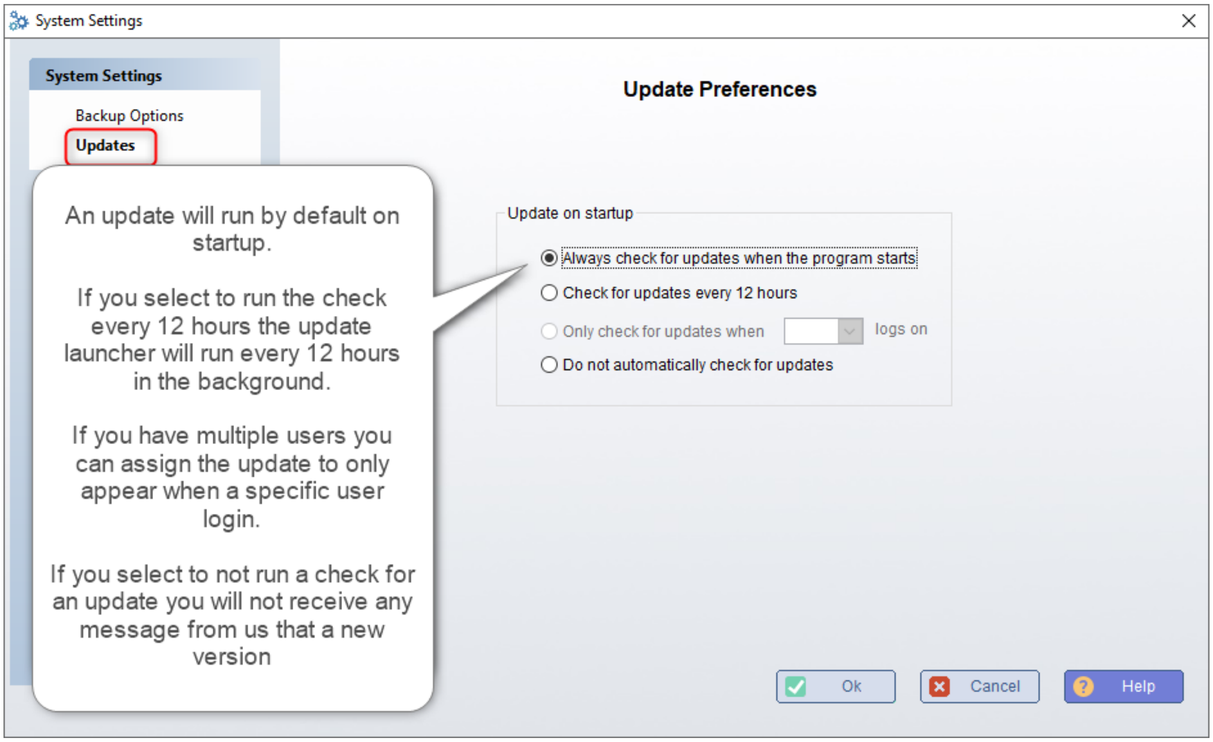
**Don't Check:** When the program launches the update checker will be off any you will not be able to see when a new update is available.

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

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

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

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



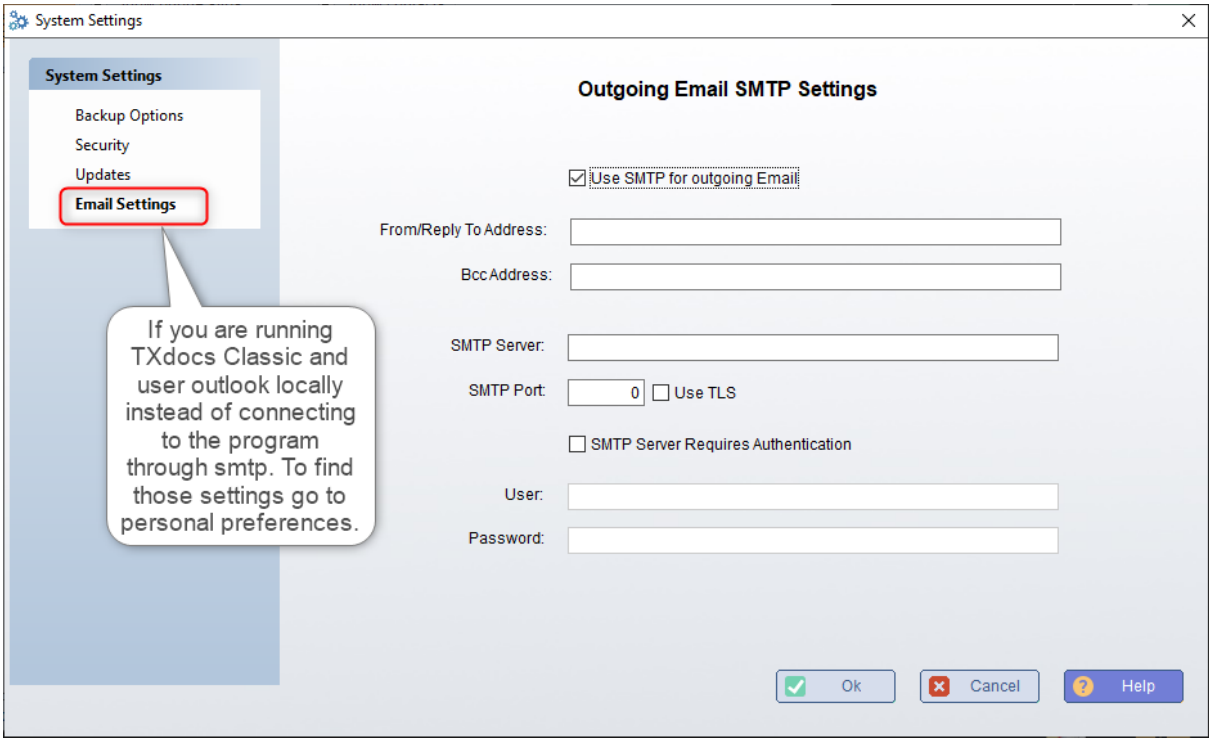

### 3.4.4 Email Settings

If you enabled TXdocs' integration with Microsoft Outlook in your Personal Settings, then you can totally disregard this window because the Outlook integration will supersede this setting. And, if you use Outlook for your email, you should use the integration service rather than this service.

If you do not use Outlook for your email, then TXdocs is able to use SMTP and it will give you the ability to send email from TXdocs using whatever email service you use. Frankly, if you do not understand the SMTP Server and SMTP port settings shown below, then just call TXdocs' tech support for help getting these settings right. The phone number is (210) 253-9506.

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

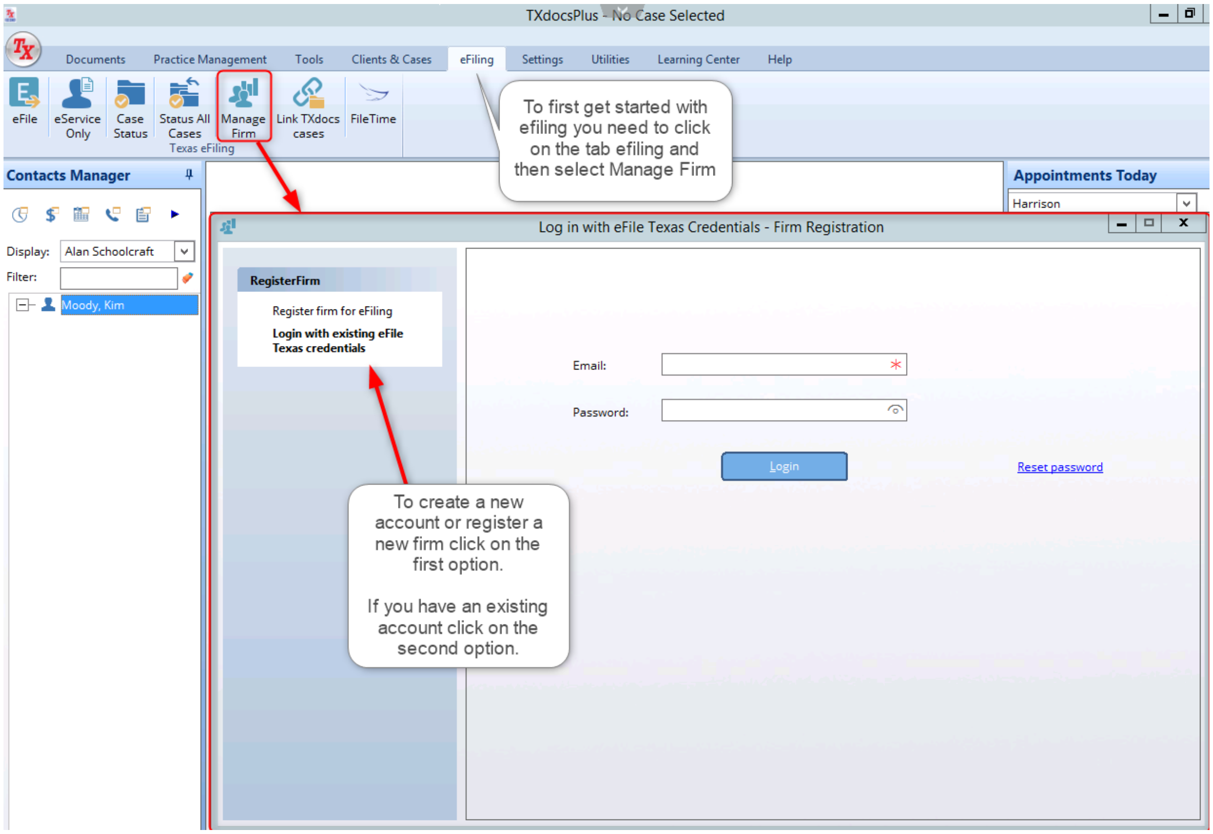

System Settings
System Settings
Backup Options
Security
Updates
Email Settings
If you are running TXdocs Classic and user outlook locally instead of connecting to the program through smtp. To find those settings go to personal preferences.
Outgoing Email SMTP Settings
Use SMTP for outgoing Email
From/Reply To Address:
Bcc Address:
SMTP Server:
SMTP Port:
0
Use TLS
SMTP Server Requires Authentication
User:
Password:
Ok
Cancel
Help

# Efiling Overview

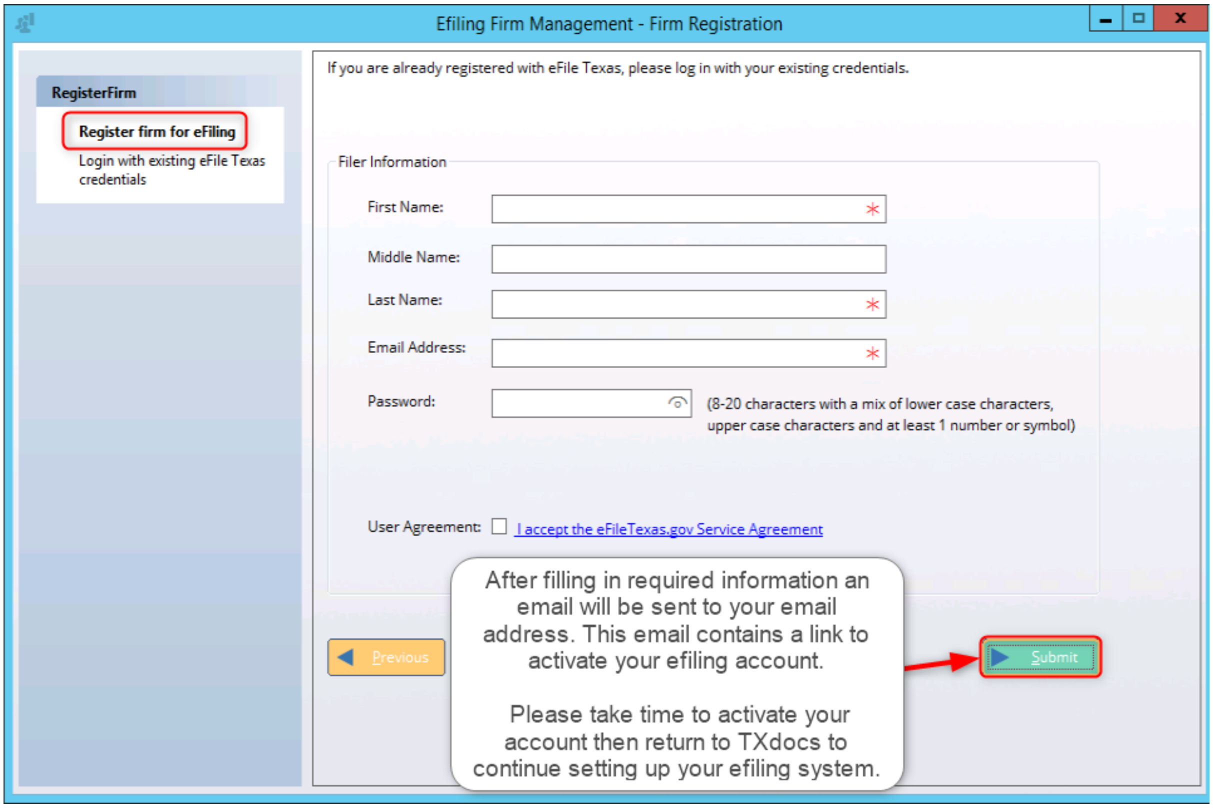
# 4 Efiling Overview

## 4.1 Login to efiling

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




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

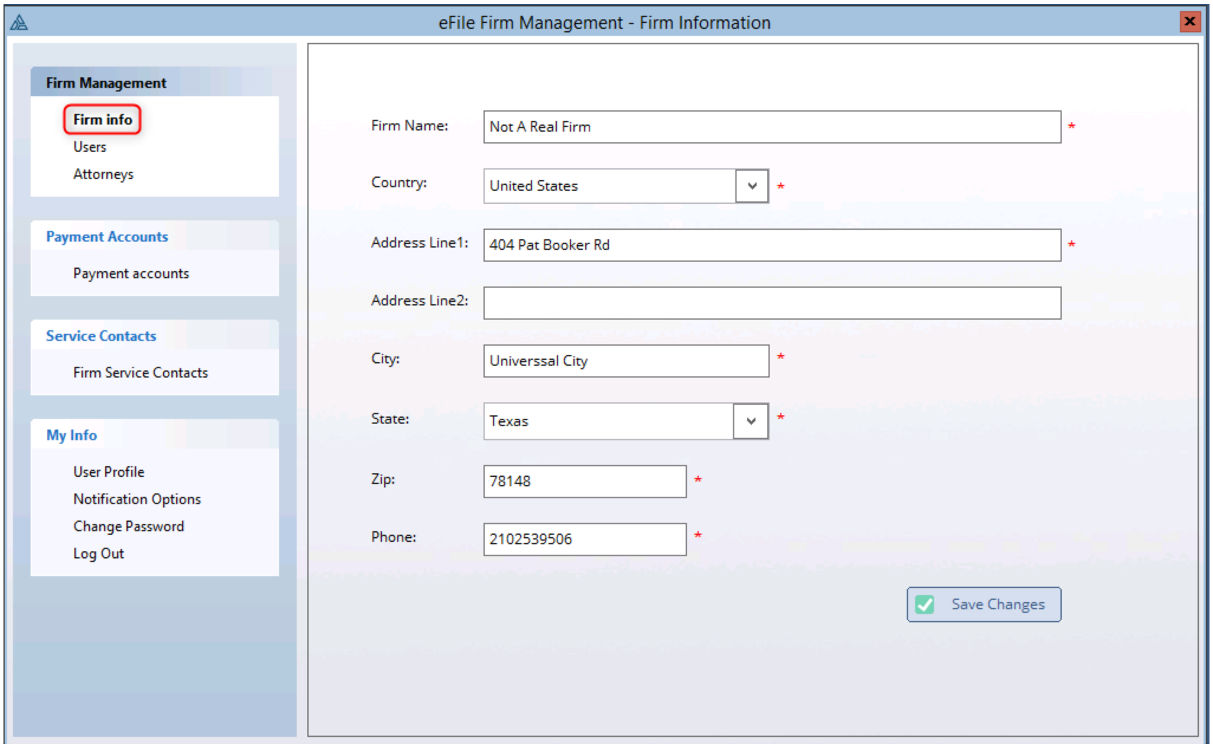



## 4.2 Manage Firm

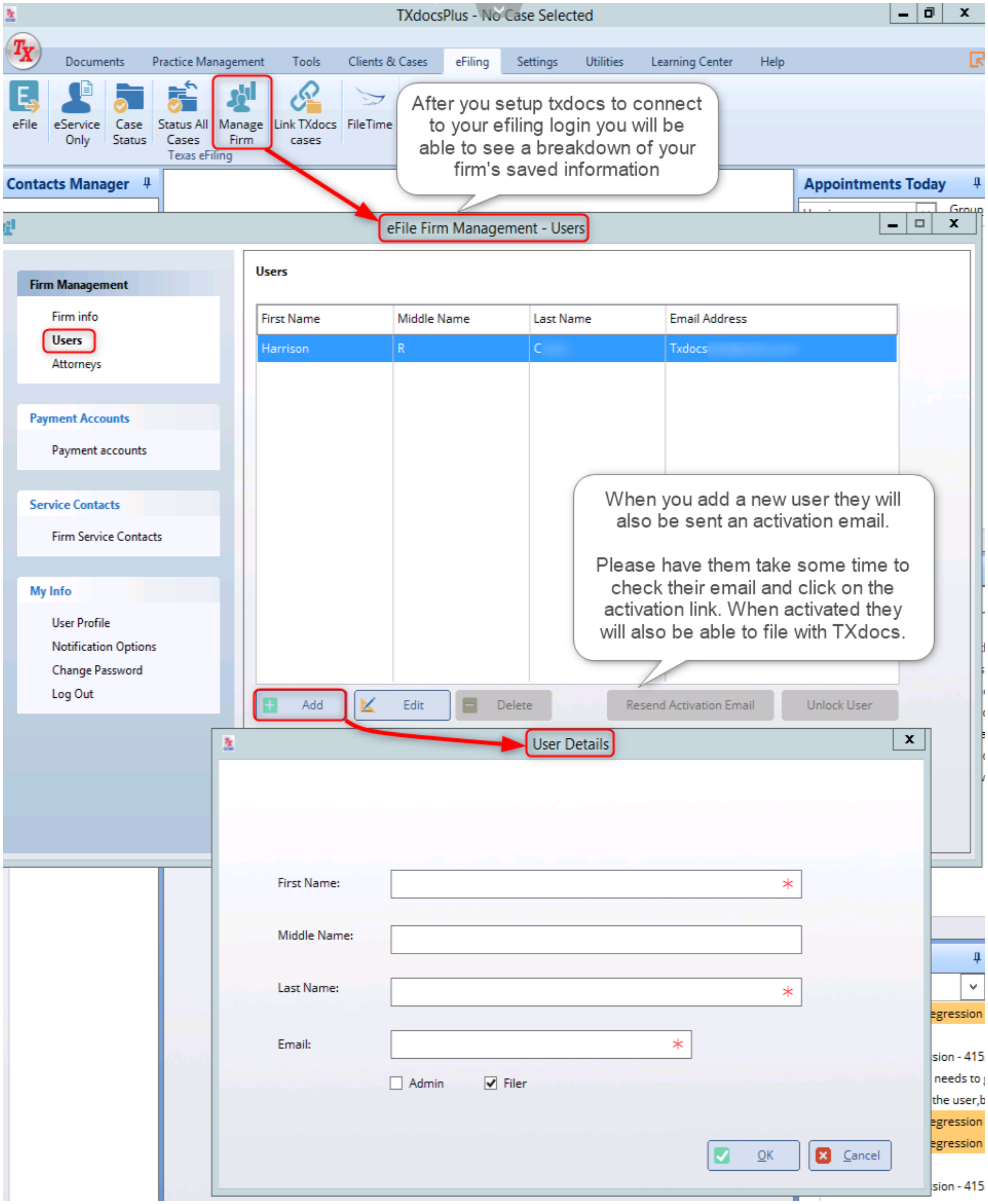
After a firm has been registered or you have logged into an existing account clicking on firm management will load your current account information. On firm management you will be able to edit staff information, payment accounts, Service contacts, and alternative information. Additional info regarding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

Firm Management Information

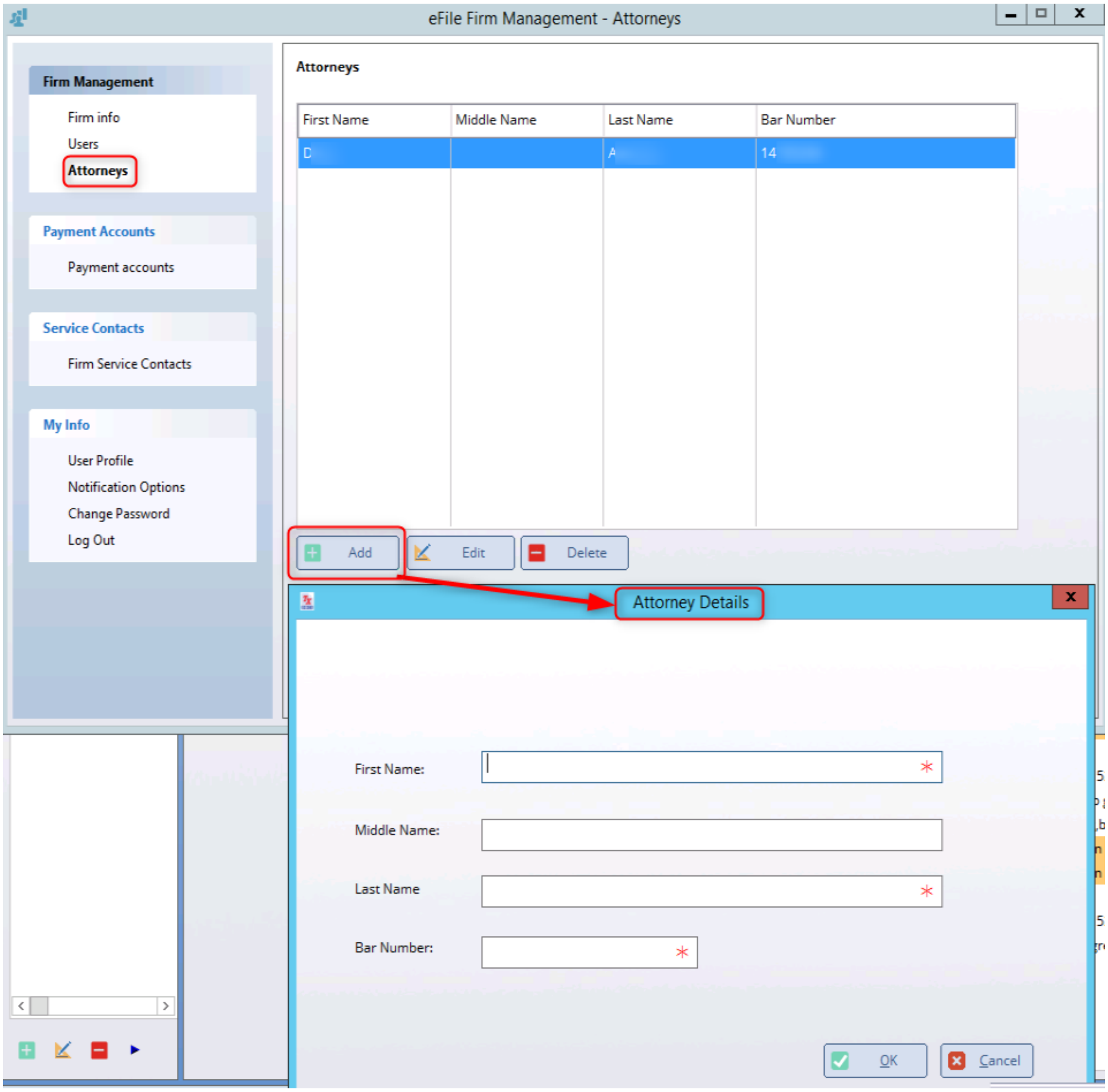
Firm Info - Enables you to change the firm information listed. Changes such as the name of the firm address and contact number




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

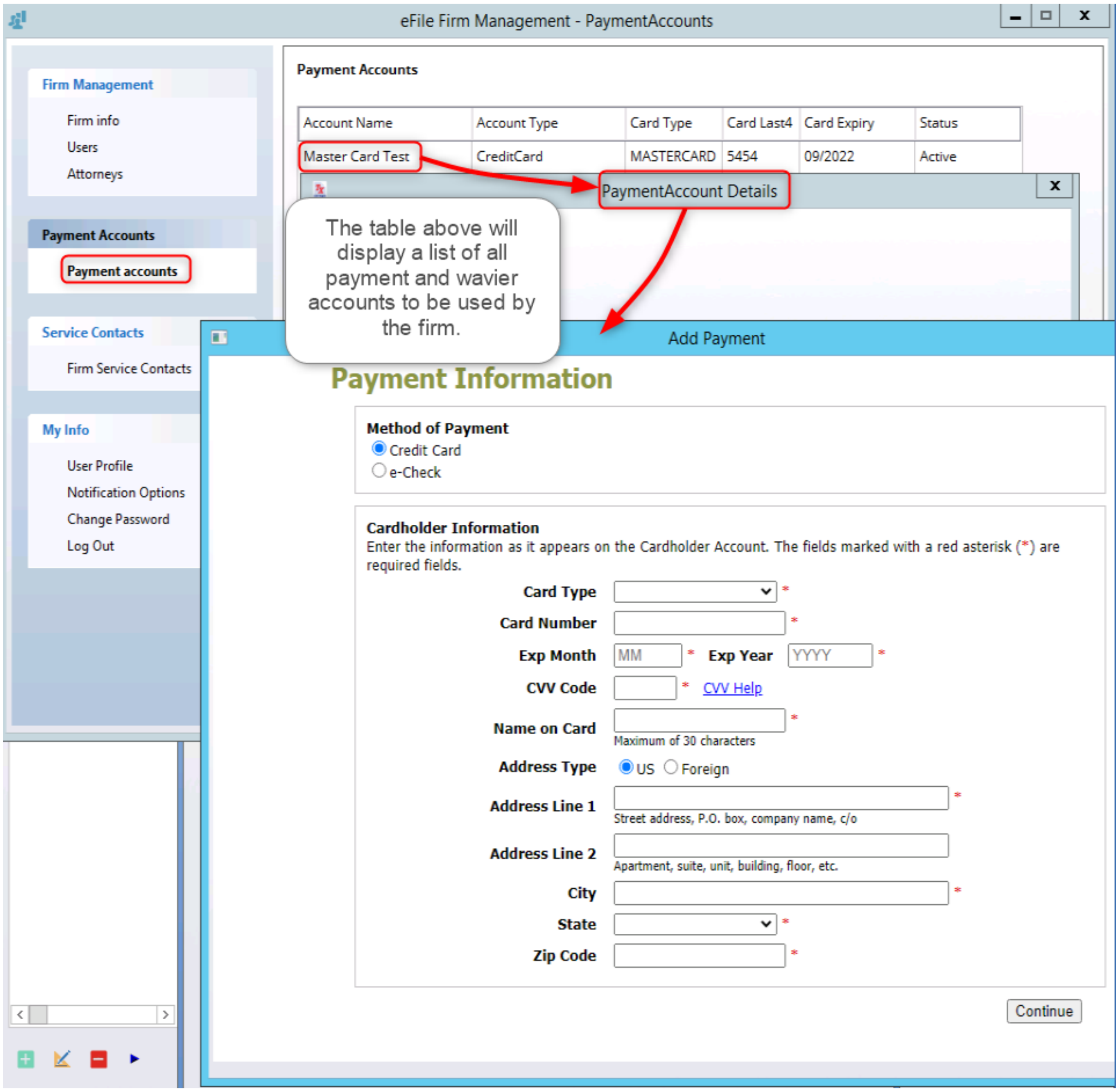



Attorneys - Edit or add attorneys to the account. This requires a valid bar number



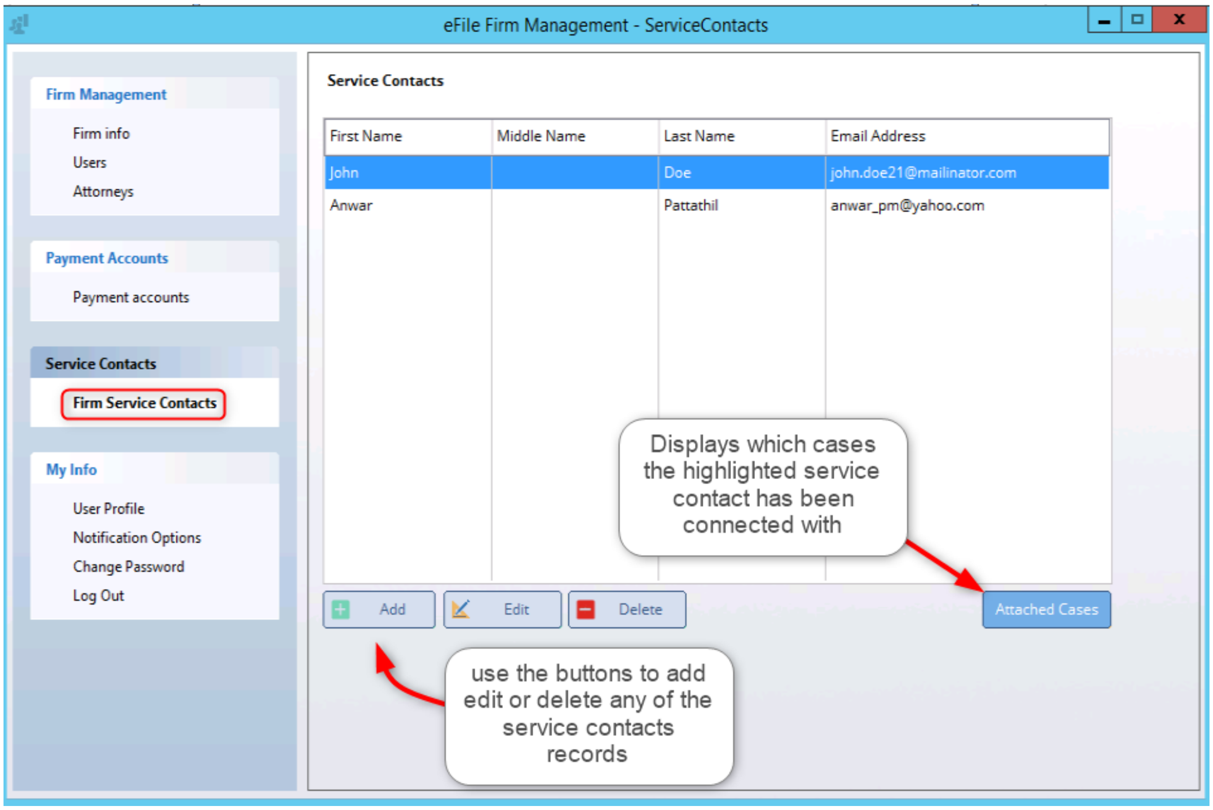

<u>Payment accounts</u>

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



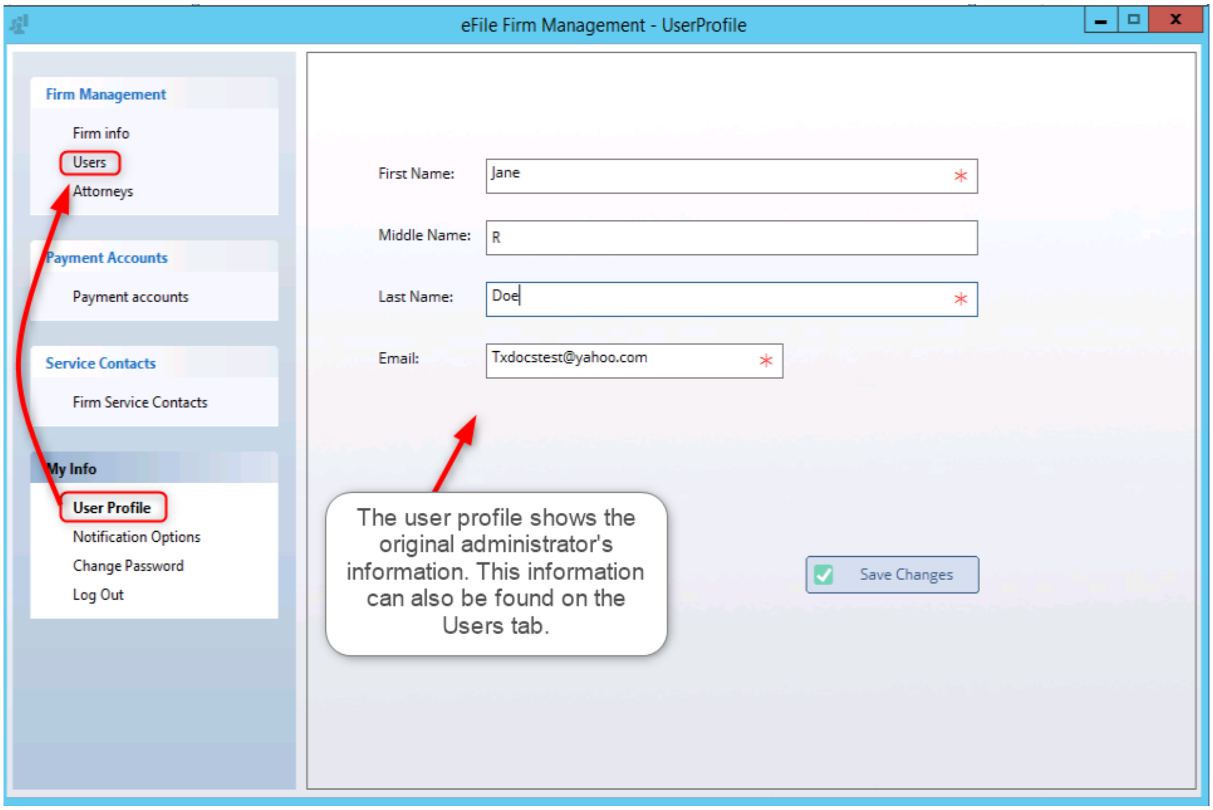

## Service Contacts

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

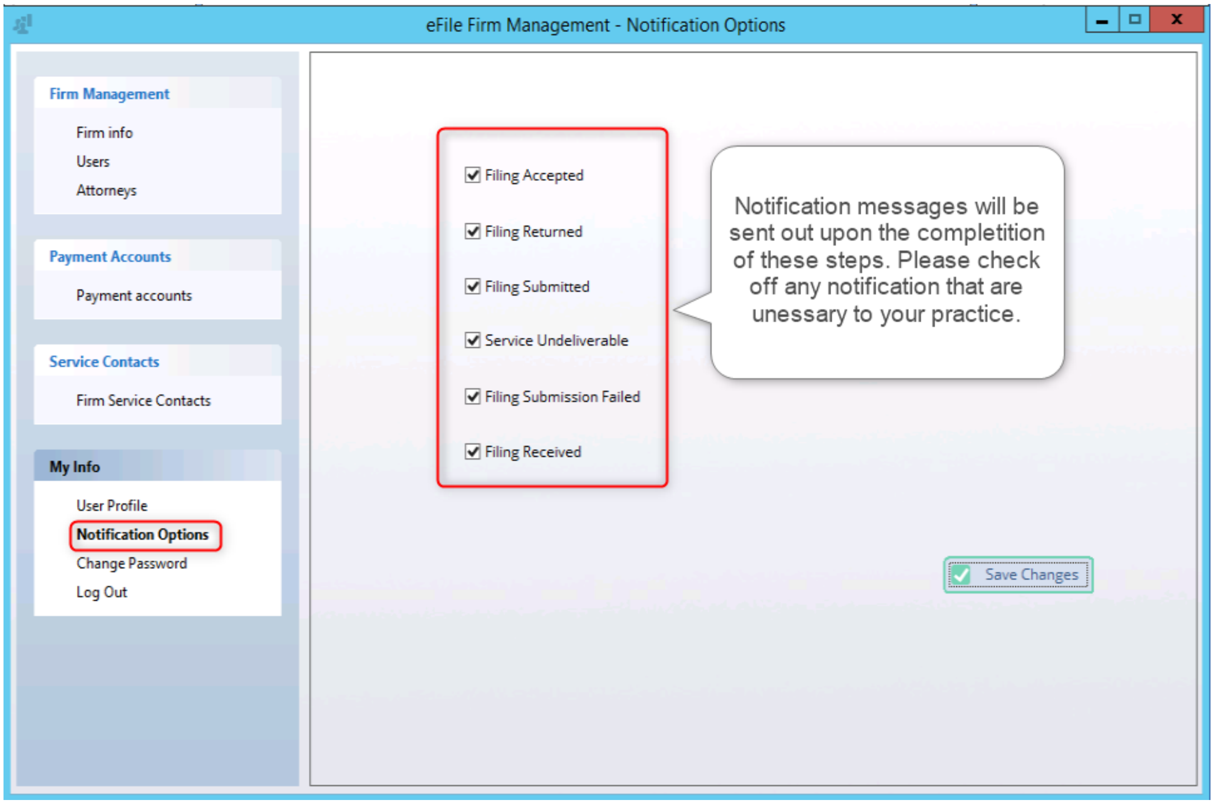

eFile Firm Management - ServiceContacts
Firm Management
Firm info
Users
Attorneys
Payment Accounts
Payment accounts
Service Contacts
Firm Service Contacts
My Info
User Profile
Notification Options
Change Password
Log Out
Service Contacts
First Name
Middle Name
Last Name
Email Address
John
Doe
john.doe21@mailinator.com
Anwar
Pattathil
anwar_pm@yahoo.com
Displays which cases the highlighted service contact has been connected with
Add
Edit
Delete
Attached Cases
use the buttons to add edit or delete any of the service contacts records

## User Profile

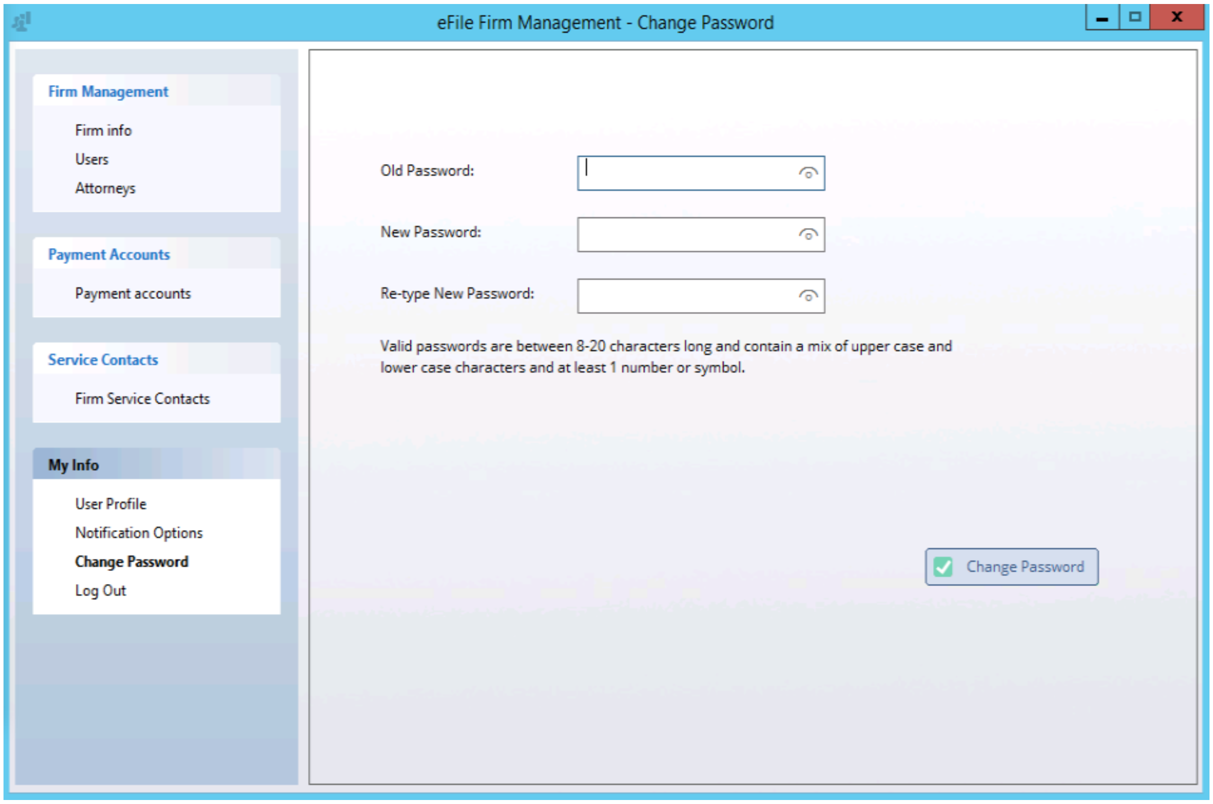
User Profile - Changes the default user settings




Notification Options - This changes our notified settings.



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

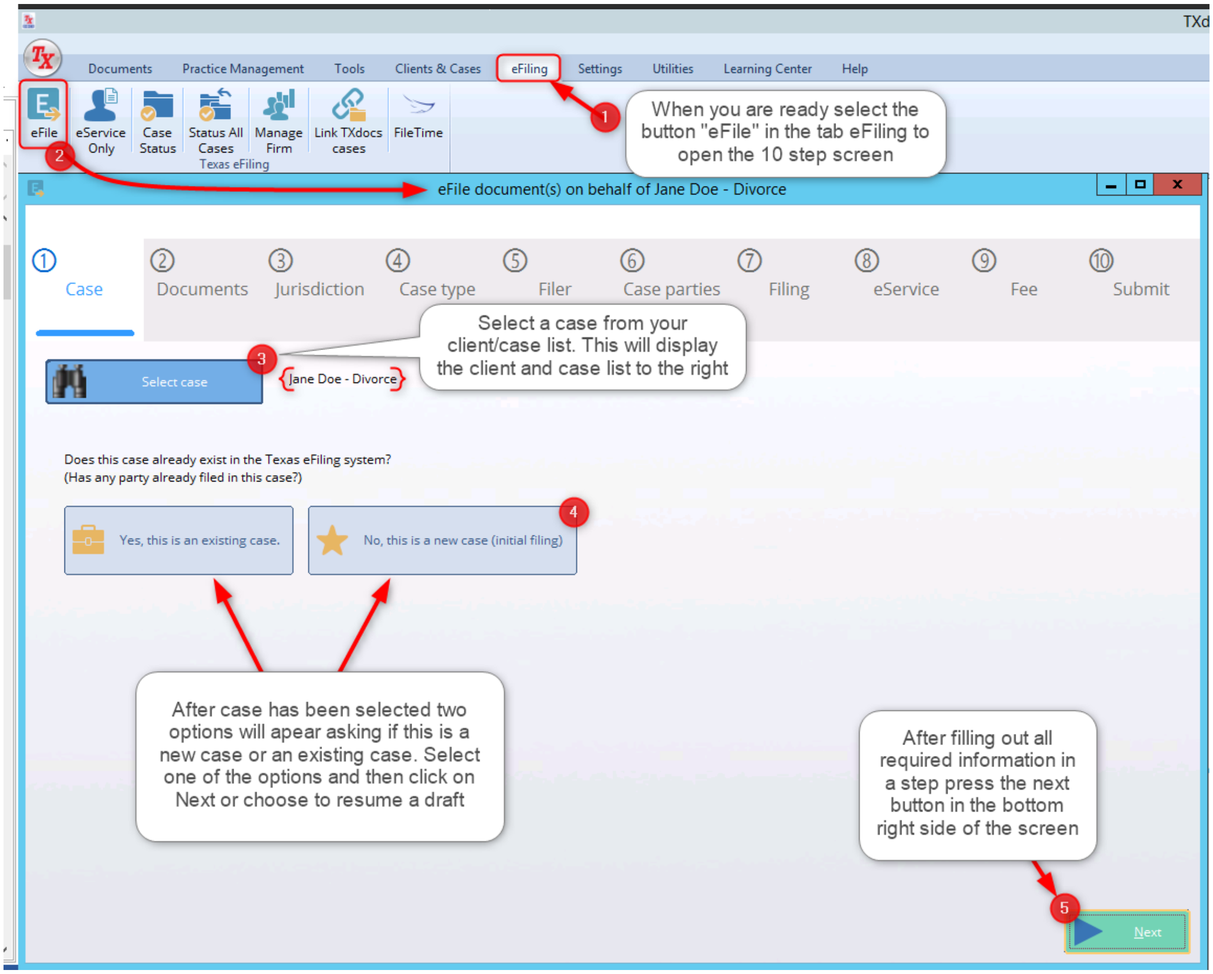



## 4.3 Step by Step Efiling

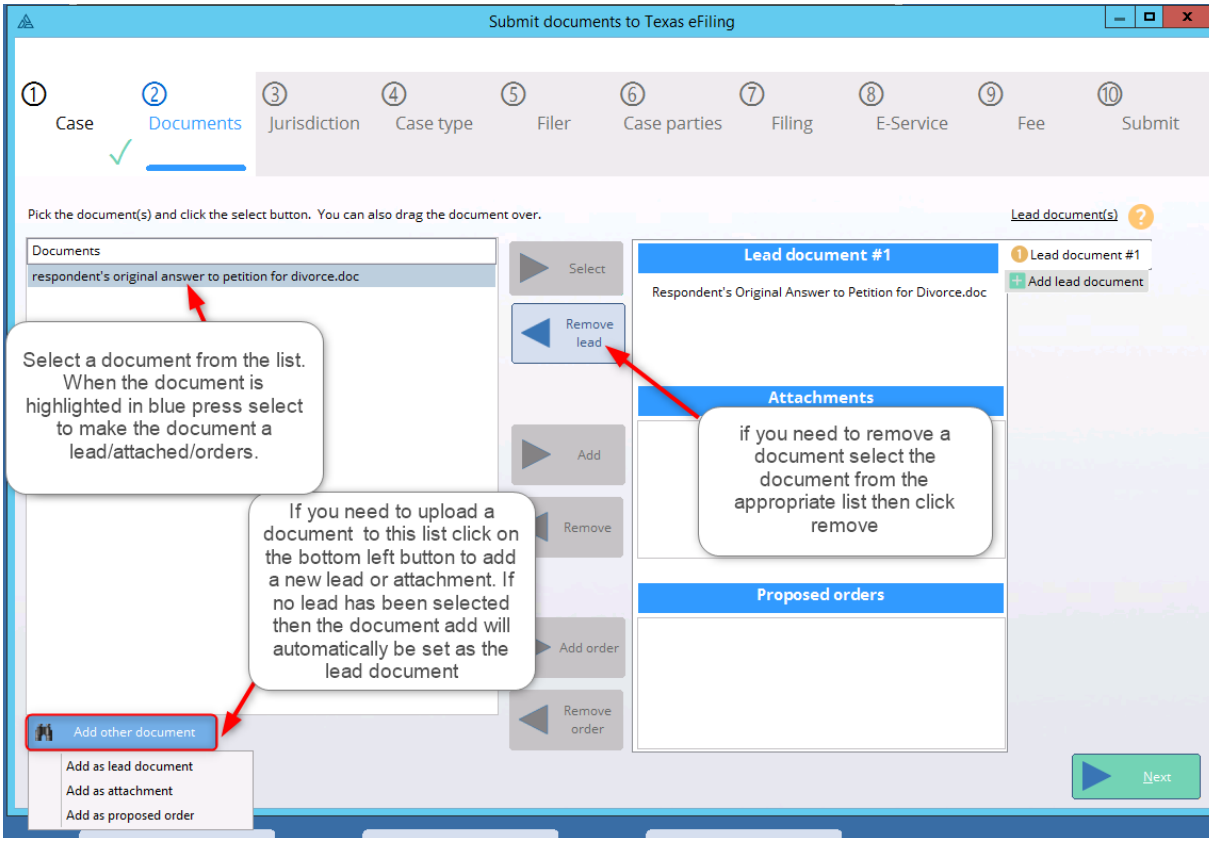
After logging into our eFiling system you are ready to begin filing your documents with TXdocs. To start click on eFile at the top left of the TXdocs program

The submit screen will open with our 10 step eFiling process

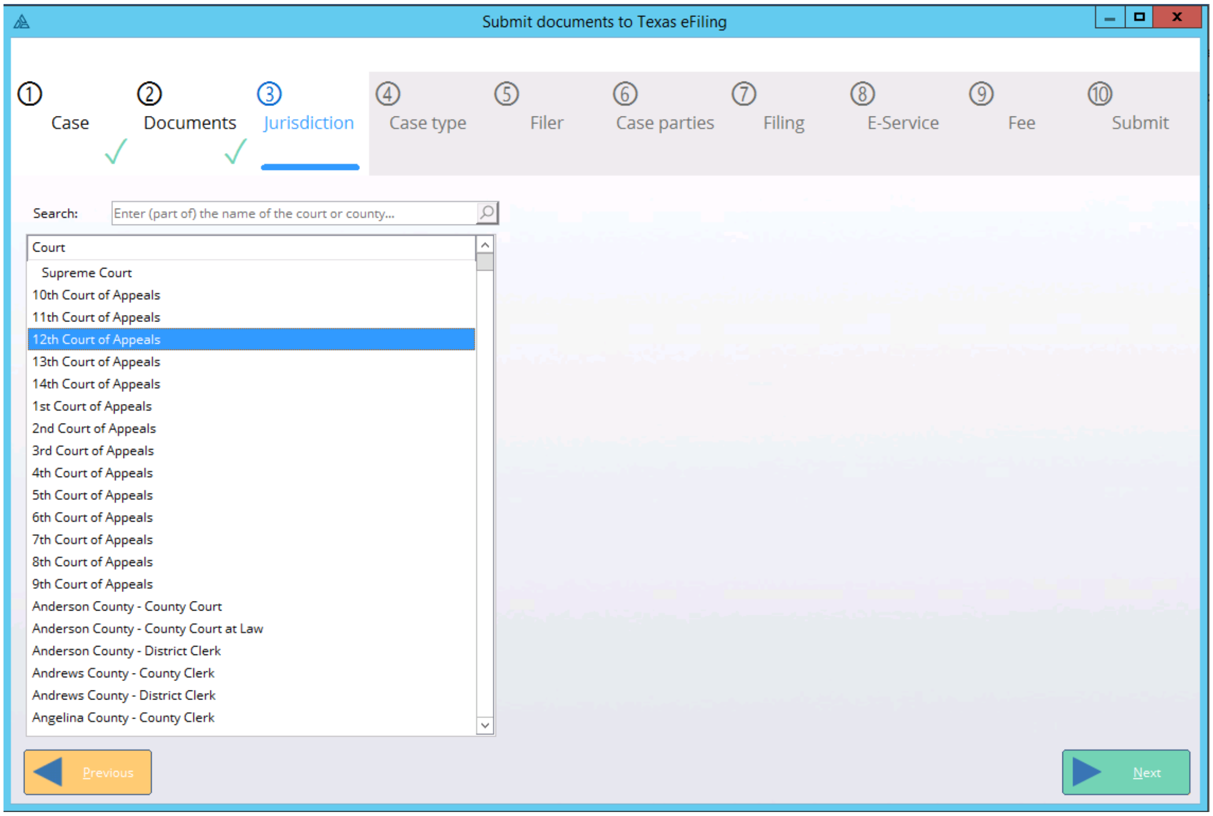
Step 1. Select a case and determine if the case in an initial filing or for an existing case. NOTE: If you decided to quit in the middle of submitting your document you can save the information as a draft (Click here to see recovering a draft). Upon selecting your case and initial filing a second option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



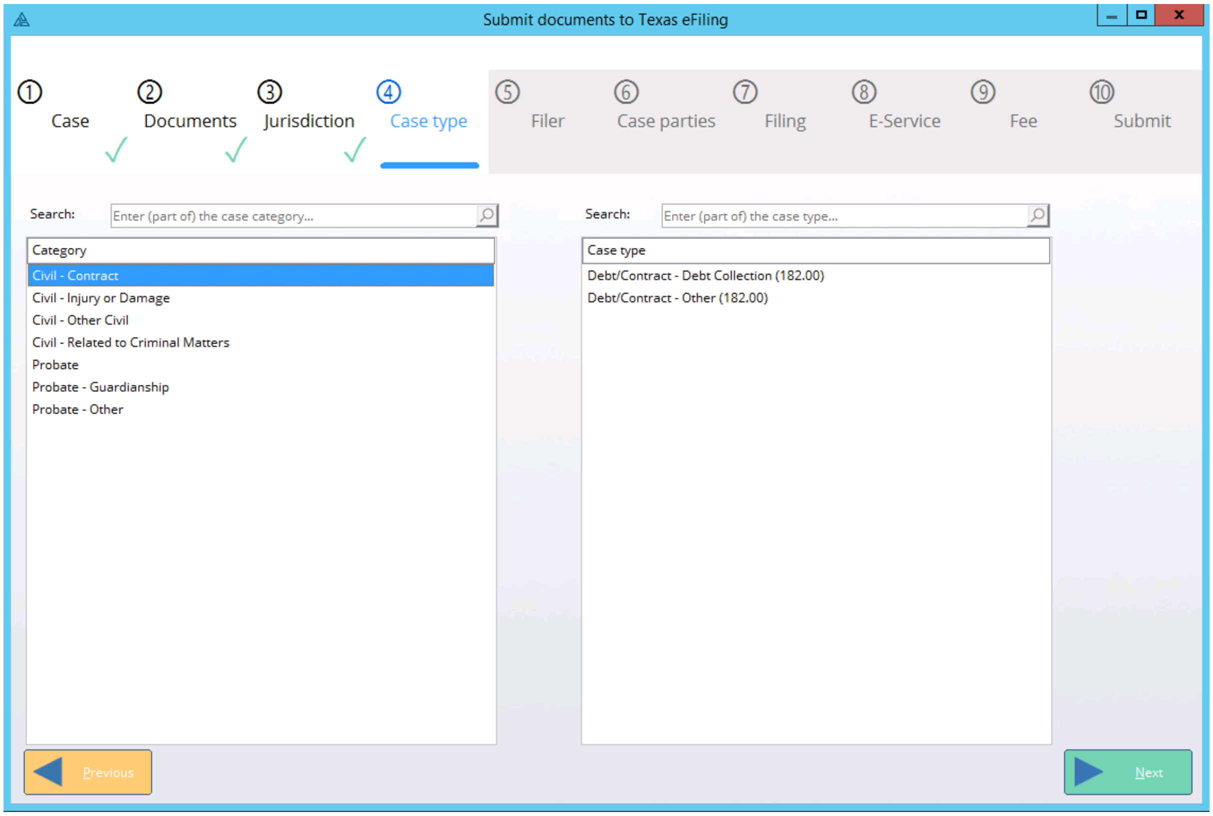

Step 2. After the case has been selected the list of assembled documents for this case will be listed on the left-hand side. The right side will display the selected lead document and any attached documents or orders. If you want to upload a document that wasn't assembled by TXdocs you can click on the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



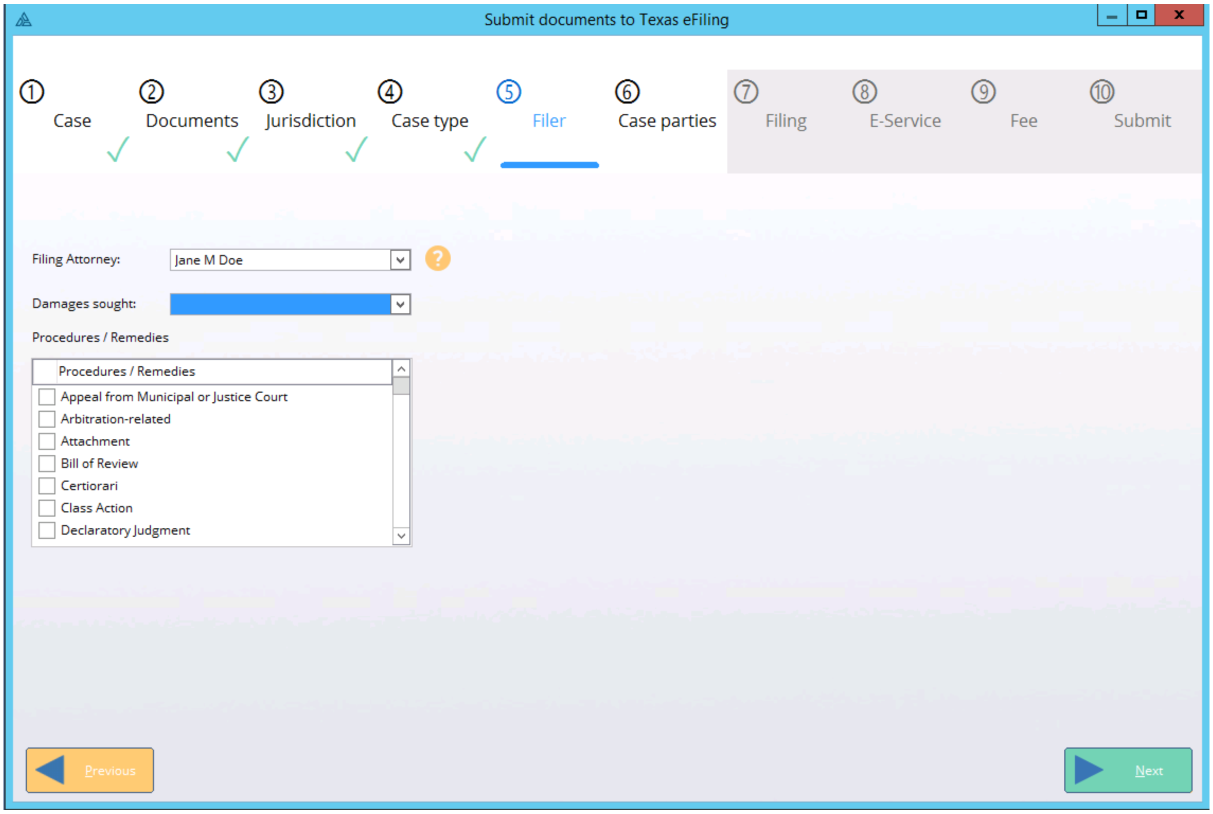

Step 3. Set the jurisdiction of the court. If the lead document was assembled in TXdocs we will pull from the case answers to auto input the jurisdiction information. Please review that you are in the correct district and then click next. When eFiling into an existing case to the right of the jurisdiction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



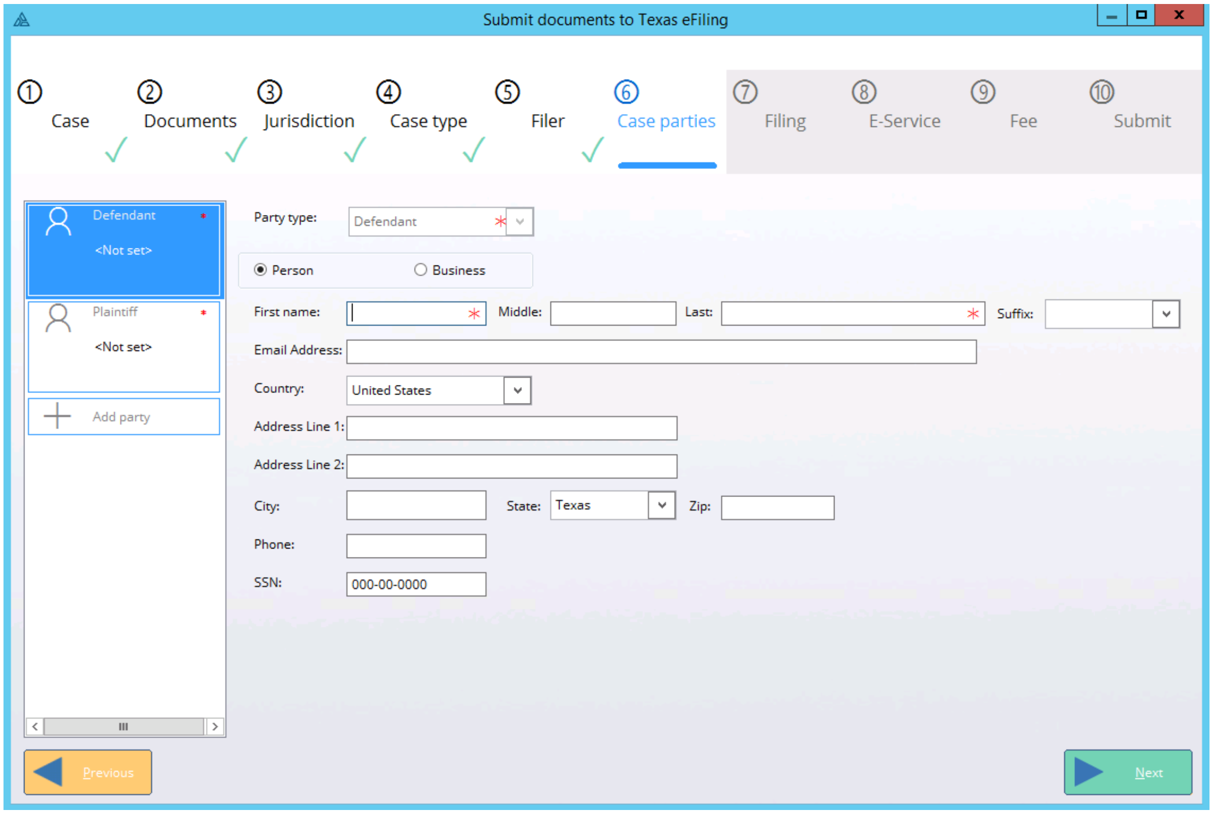

Step 4. Select the category and case type for the document. NOTE: some documents assembled through TXdocs have been set up to filter out unrelated categories. If you are running a Petition for divorce we will only show the family law categories for the jurisdiction. Alternatively, if the document has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



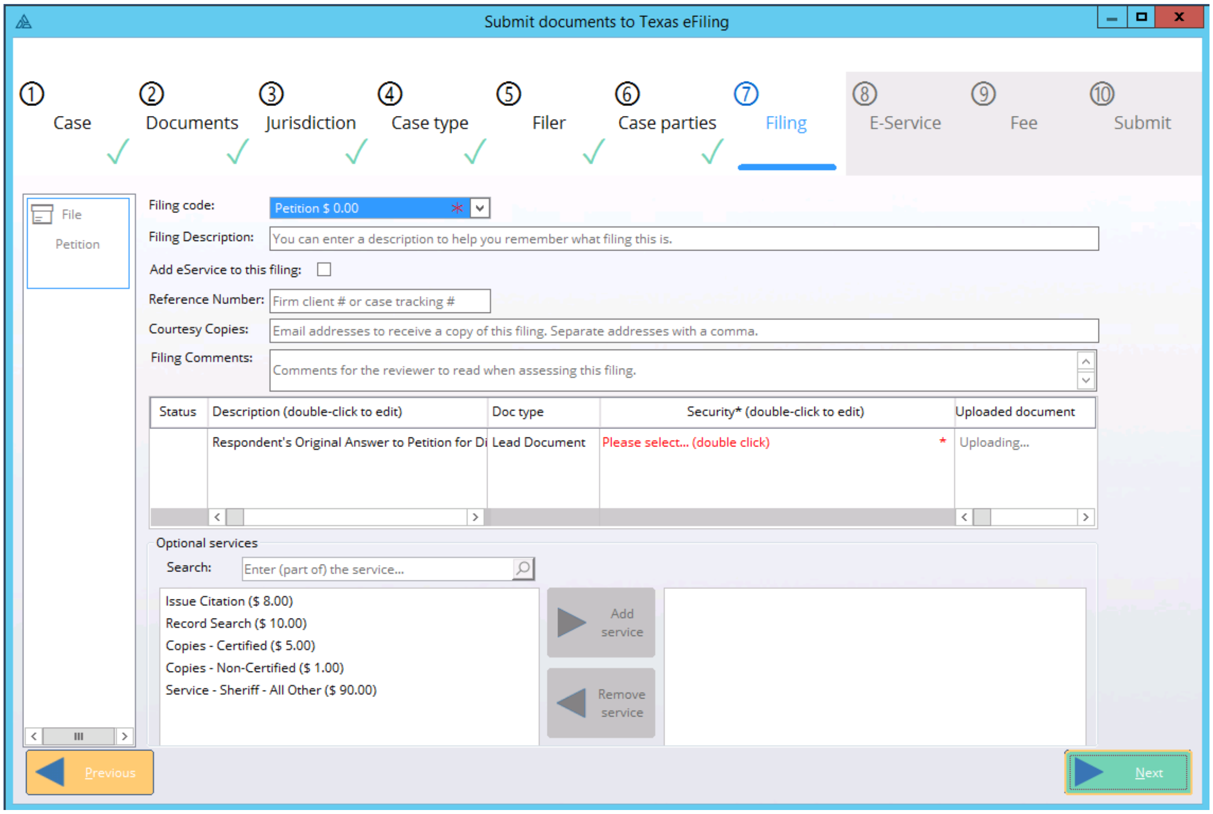

Step 5. Insert any filer information. For some cases damage sought will appear as a drop-down item.




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

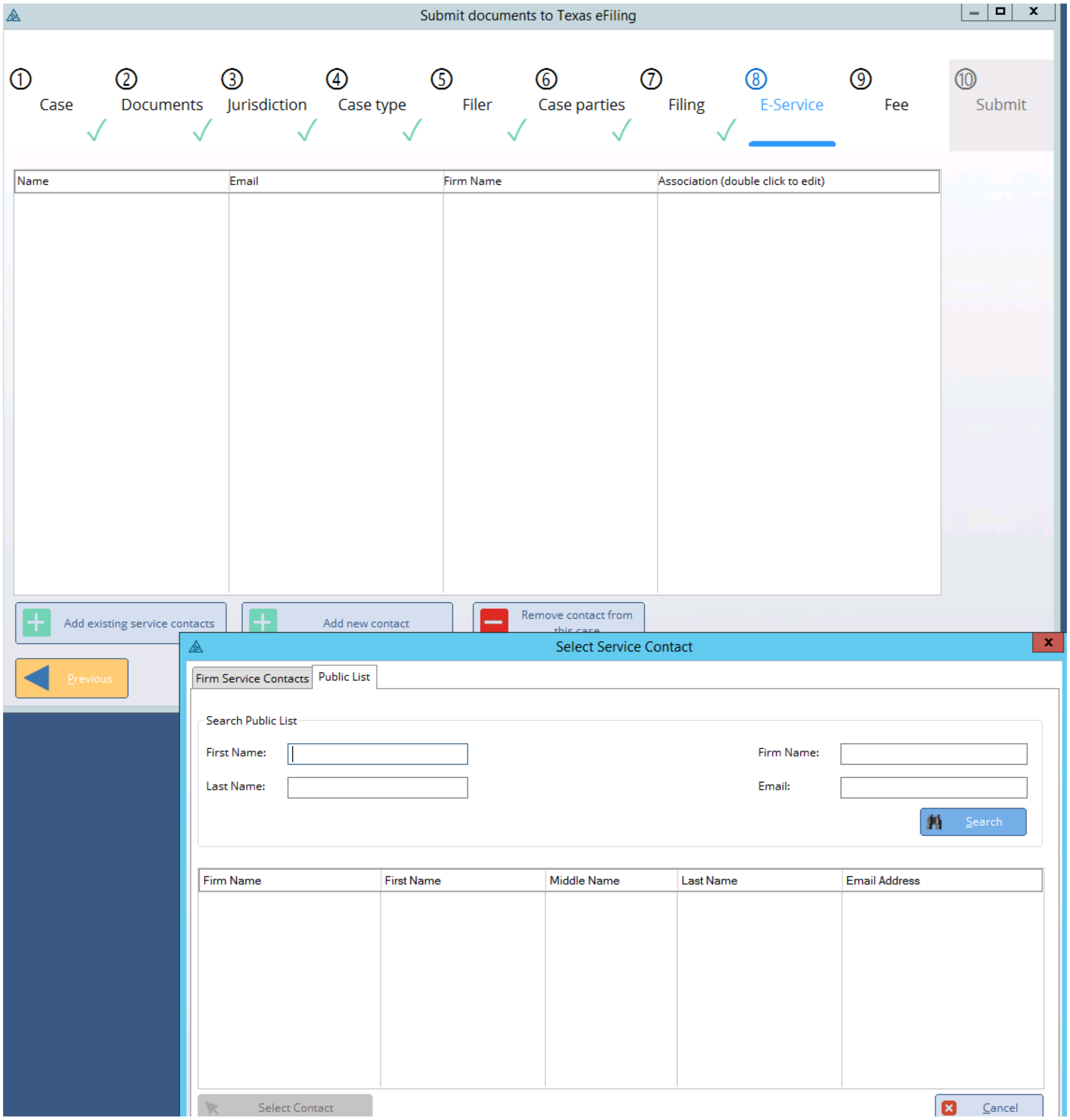



Step 7. Select your filings code, the name of the lead document will be inserted as the filing description, but this can be changed if necessary. If necessary you can add an eService to this filing. When a document is an upload we will check the document for embedded text, length and other complication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

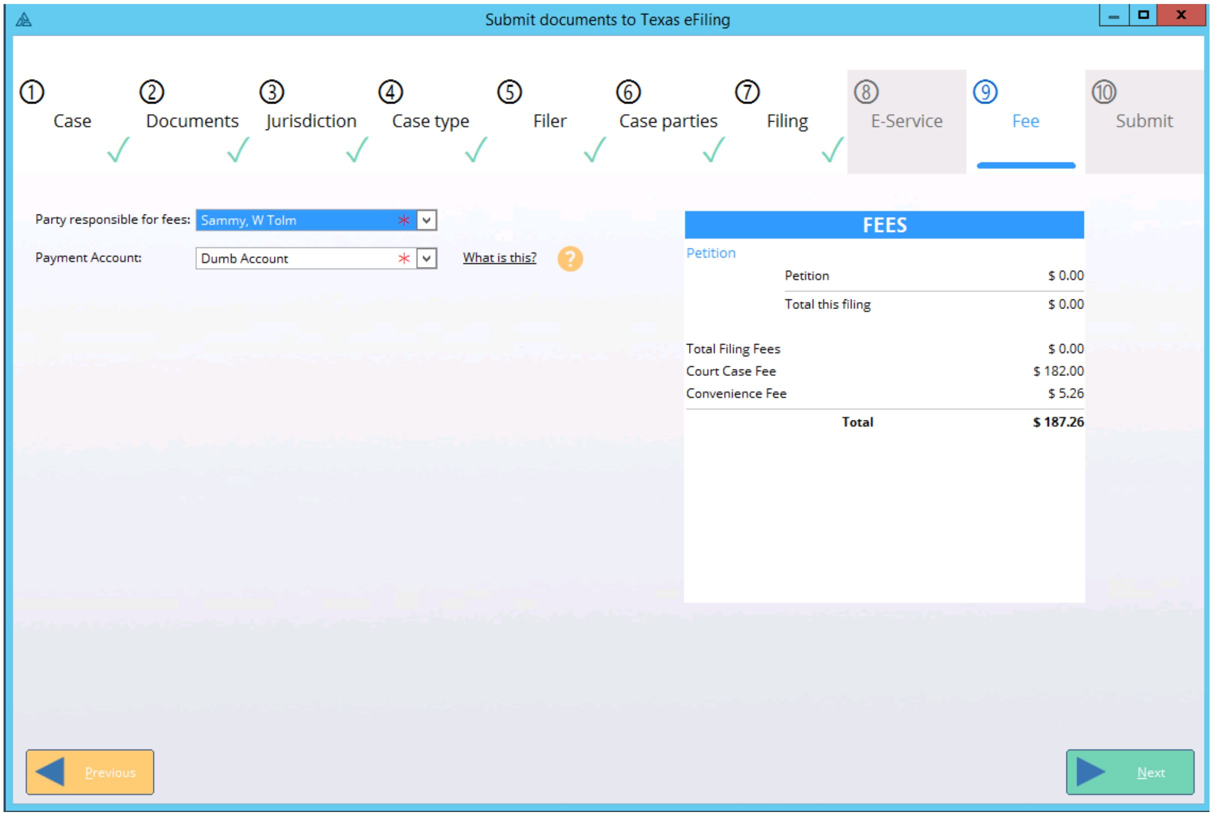



Step 8. If you didn't choose in step 7 to include an E-sevice screen you will be taken to step 9. Otherwise, on this screen, you can include an existing contact from your manage firm page, a public option, or alternatively, add a new E service contact.

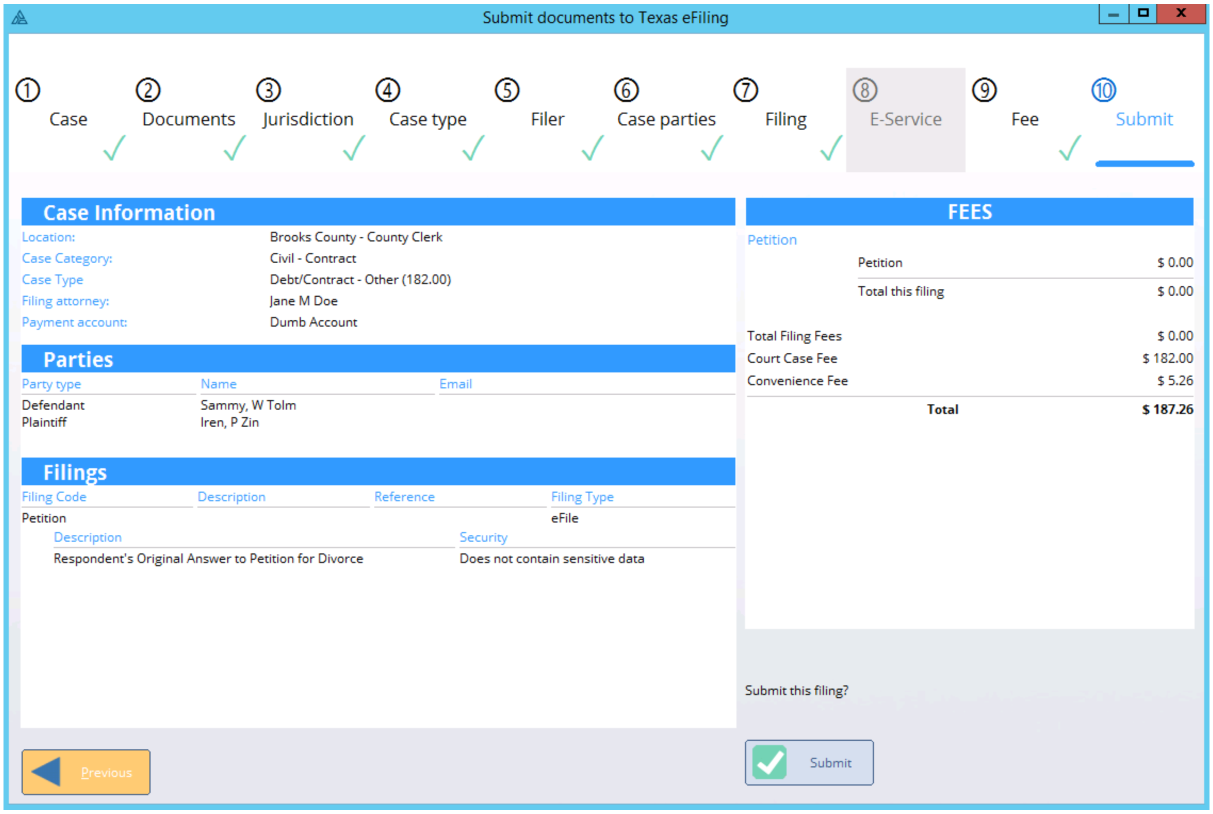
 




Step 9. Upon completing the previous steps your payment will be calculated. In this window, you will be able to change who pays and what payment method should be used.

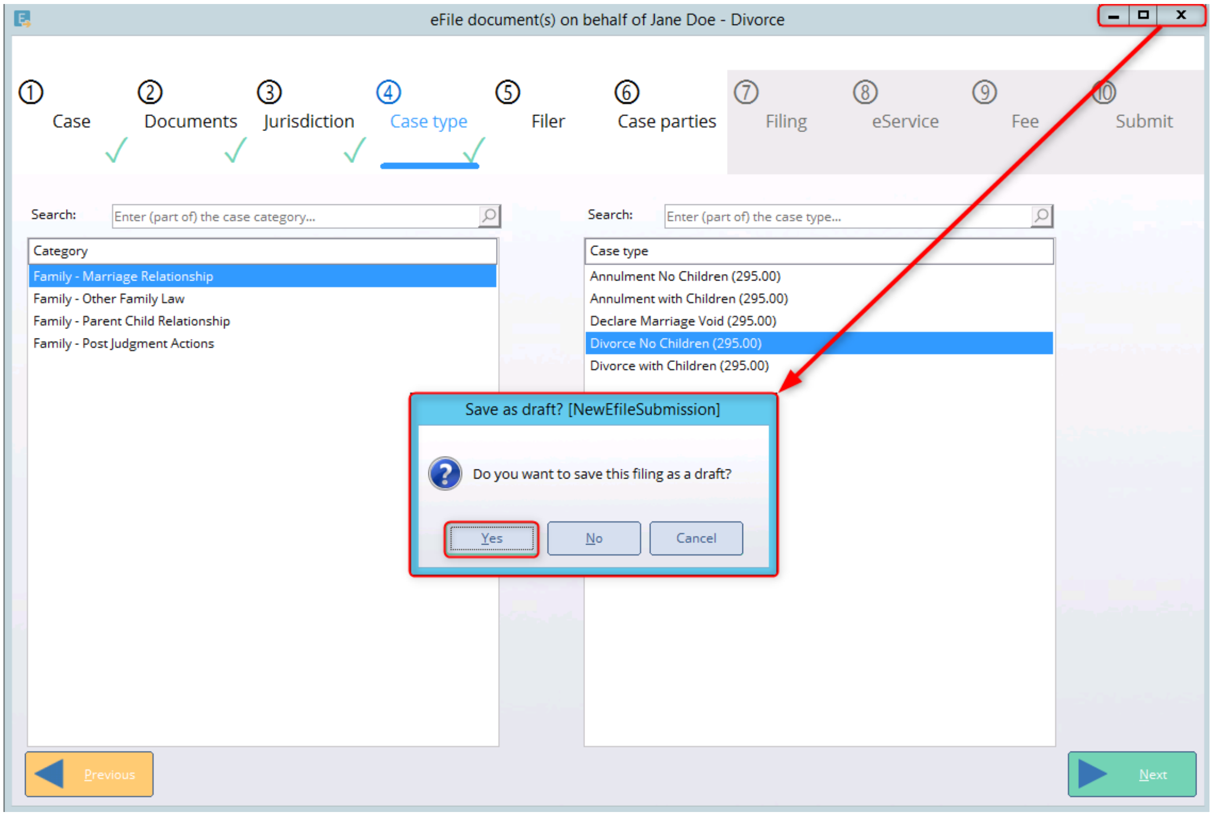



Step 10. The submit window will display all the information placed up to this point. Review then press on the green check box to finalize your filing.

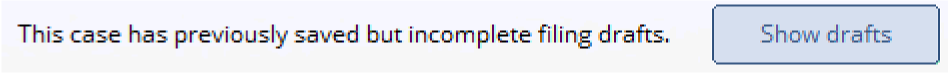



## 4.4 Recovering a Draft

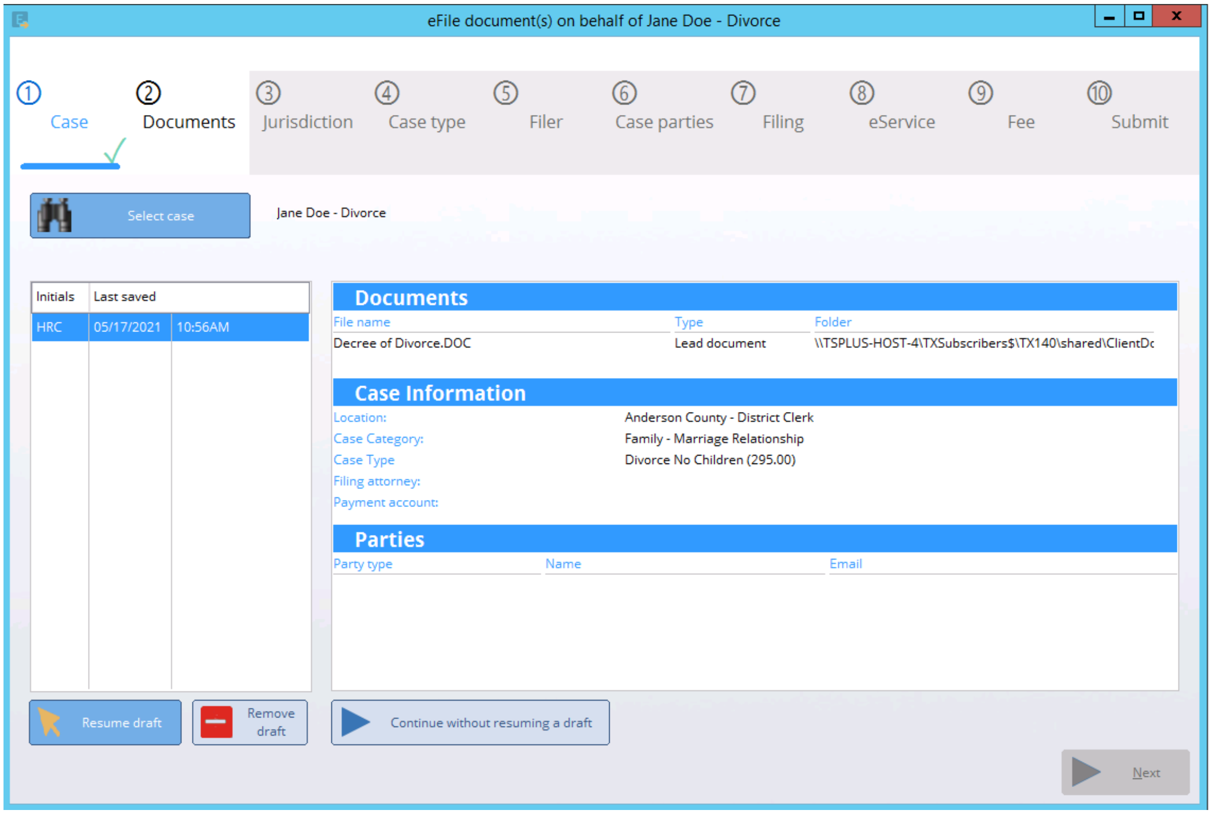
In some cases a efiling session can not be completed in a single run. If this happens you can chose to save the filing as a draft. A draft is a filing that has data in it, but has not been marked as submitted. To save a filing as a draft quit the efiling process (NOT TXdocs or the Anywhere tab) and select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




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

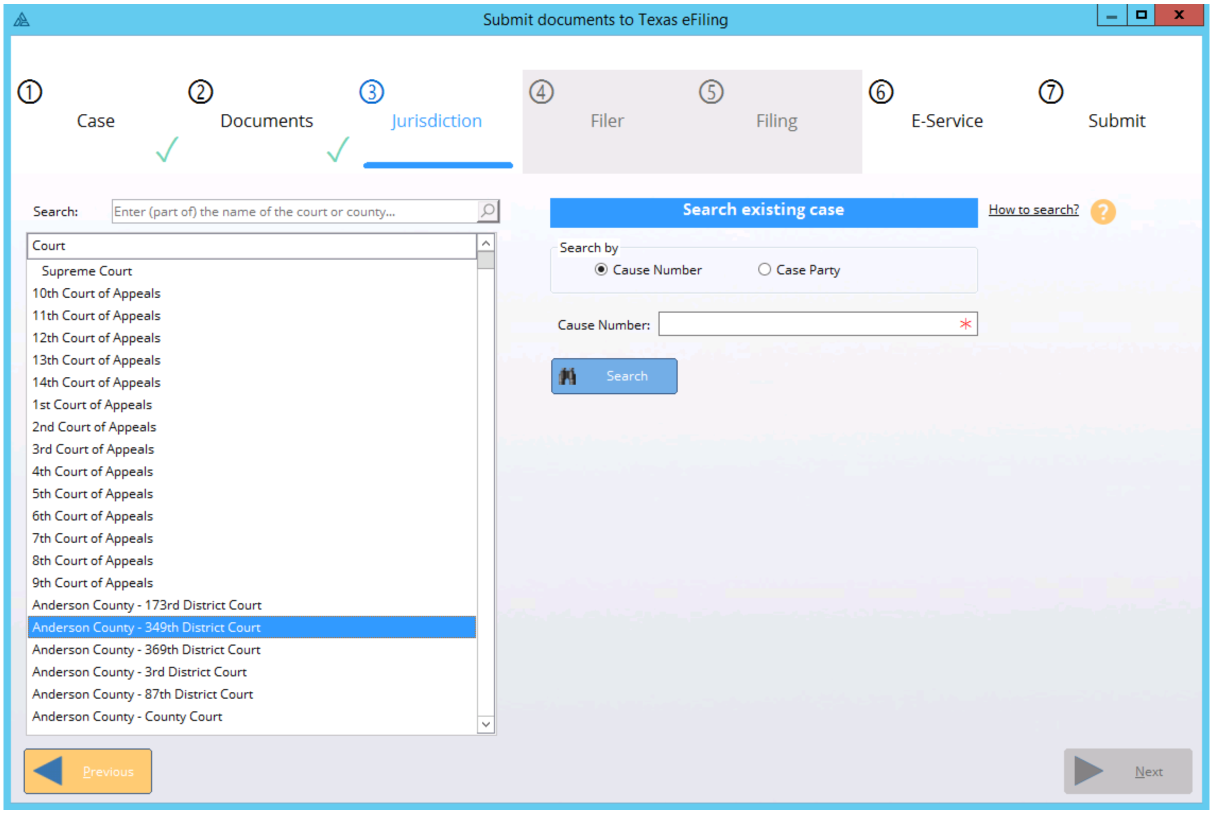



If selected you will be taken to the draft page. On the right hand window we will display the information recovered from the highlighted draft. On the left we will show when the draft was last saved. Select the save you want to continue with and click at the bottom left "Resume draft" to pick up where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




## 4.5 Eservice

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




## 4.6 Uploading Efiling

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

To Upload a Document

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

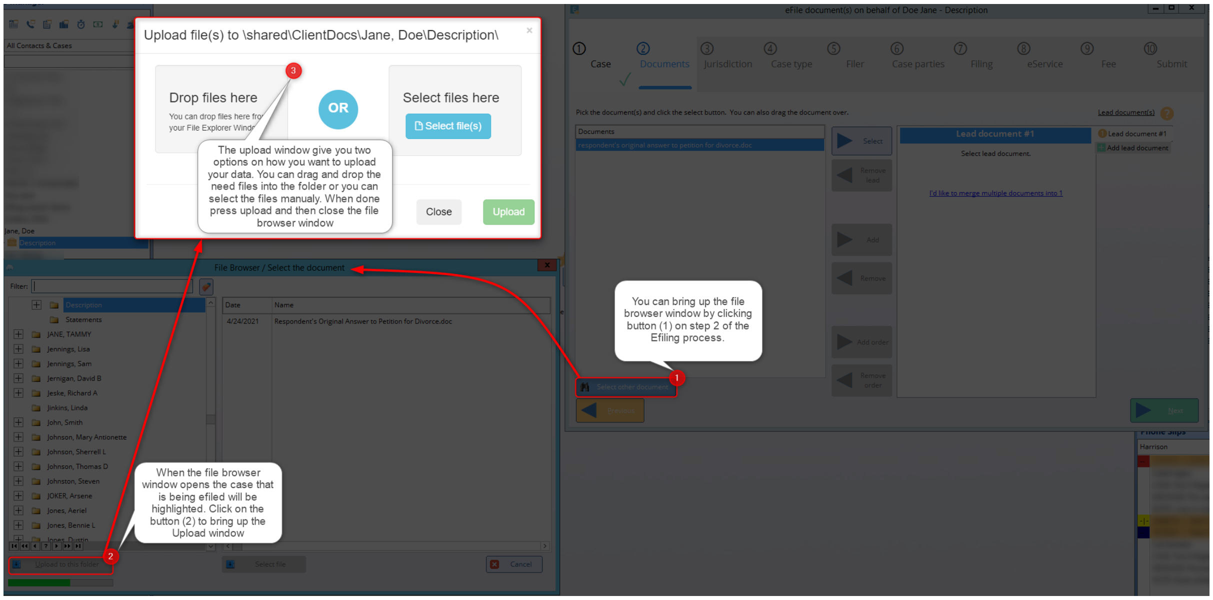
2. A window called File Browser will open. The left window will contain a list of client's and their associated cases while the right window will show a list of documents. Click on your clients case. if you do not see the case underneath the client please click on the plus button to the left of the client's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

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

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

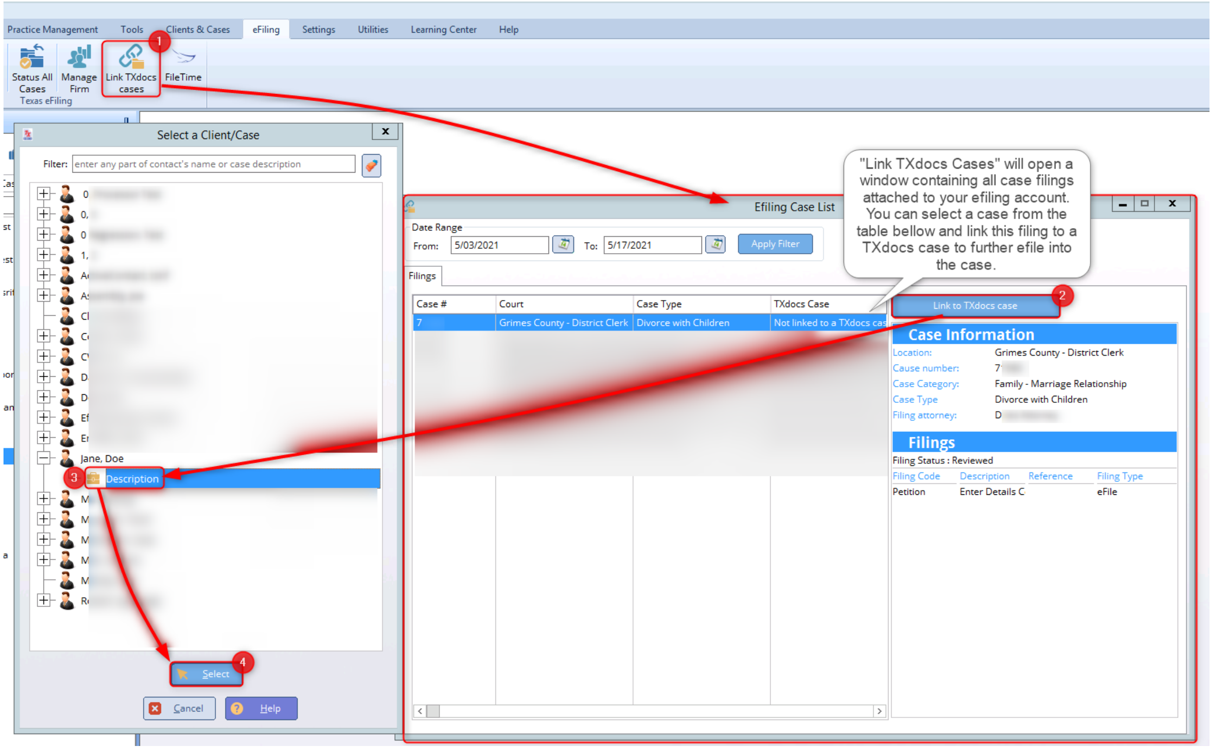
5. After files appear on the upload screen you can click upload to add these selected files from your machine to our Anywhere servers.




## 4.7 Case Status and Link

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

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




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

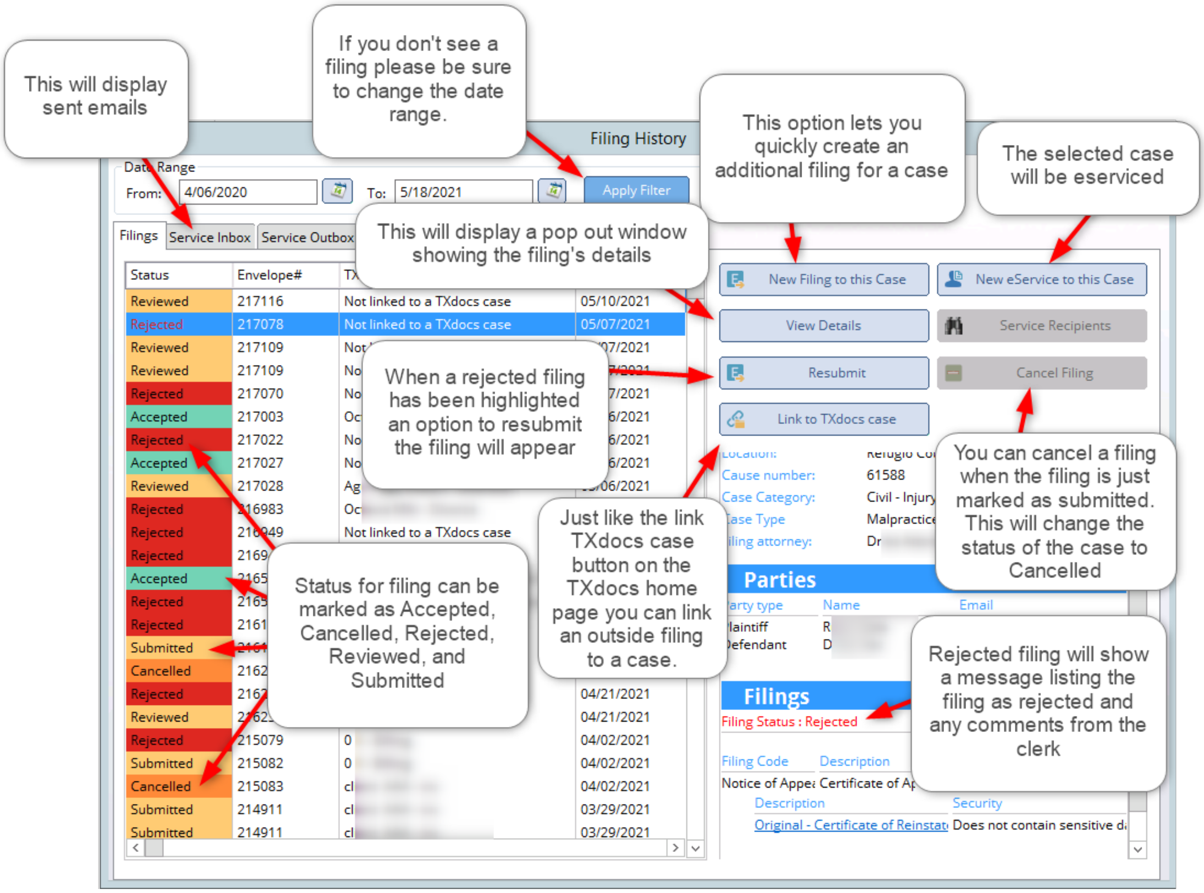
1. Submitted - After creating a filing within TXdocs the file will be listed as submitted. This means that it will be in the clerks queue.

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

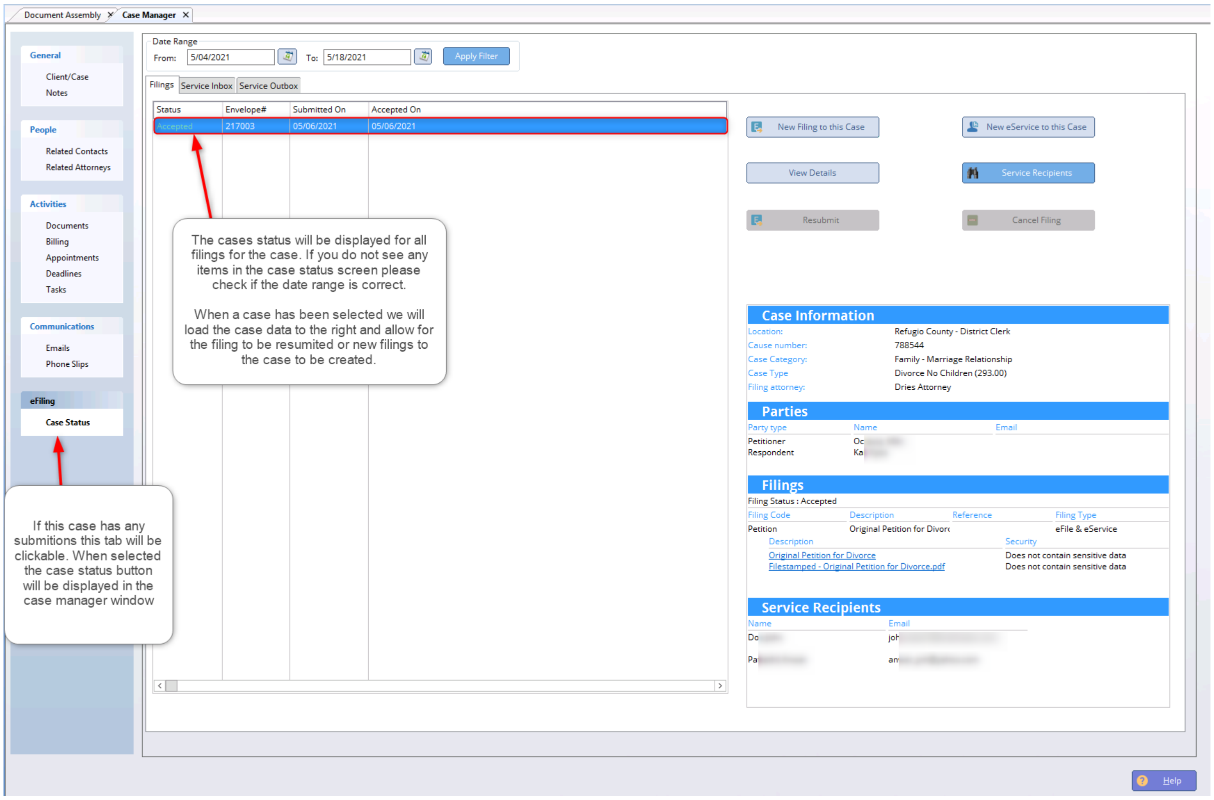
3. Rejected - This is a filing that the clerk has sent back. You can review the reason for rejection by selecting the case and looking at the comments or viewing details.

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

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

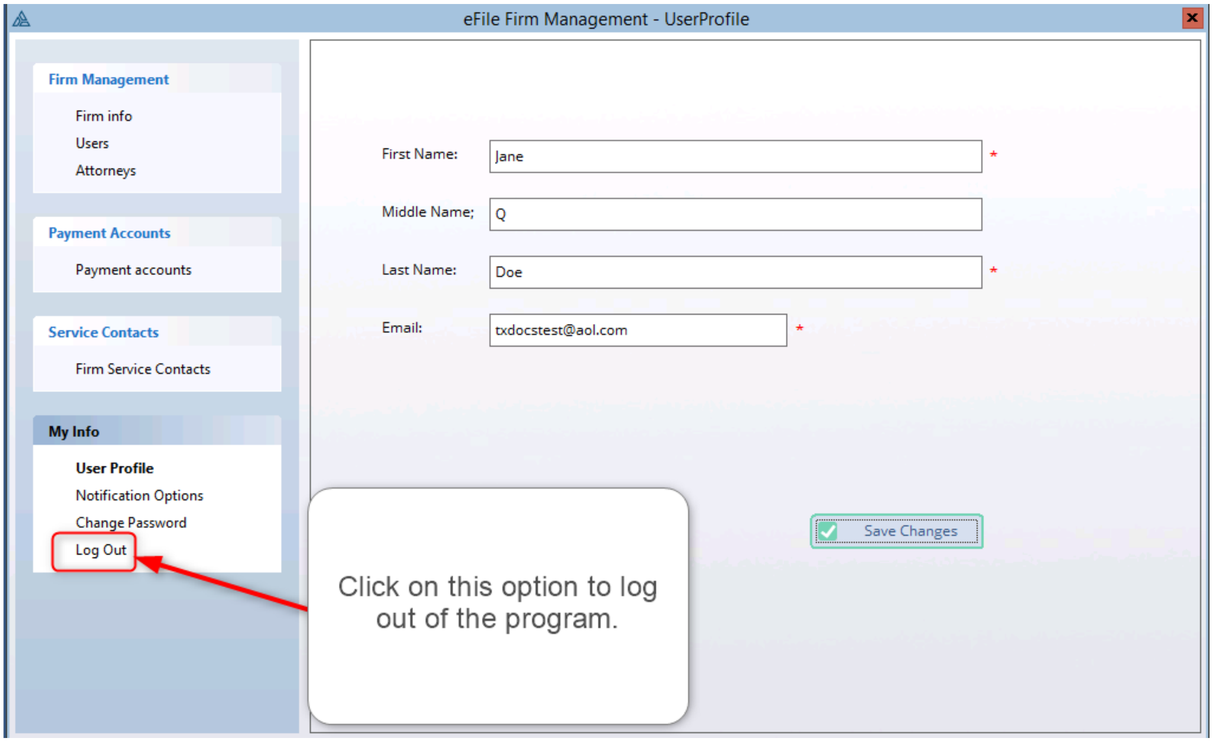


For our TXdocsPlus users we added a new tab to the case manager. This tab displays the status for the case status page. The case status page contains the same information that the all case status screen, but is linked specifically to the client loaded in the case manager.

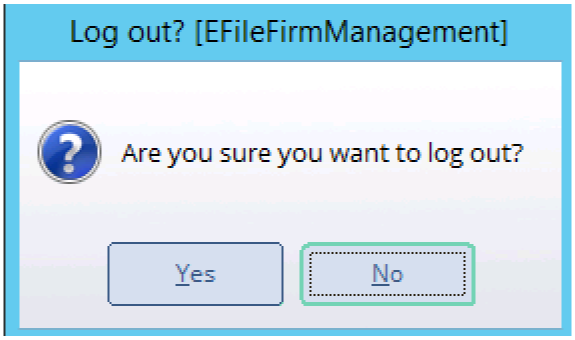



## 4.8 Efiling Logout

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




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



# TXdocs Tools

# 5 TXdocs Tools

## 5.1 Family Law Tools

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

### 5.1.1 Child Support Obligation Calculator

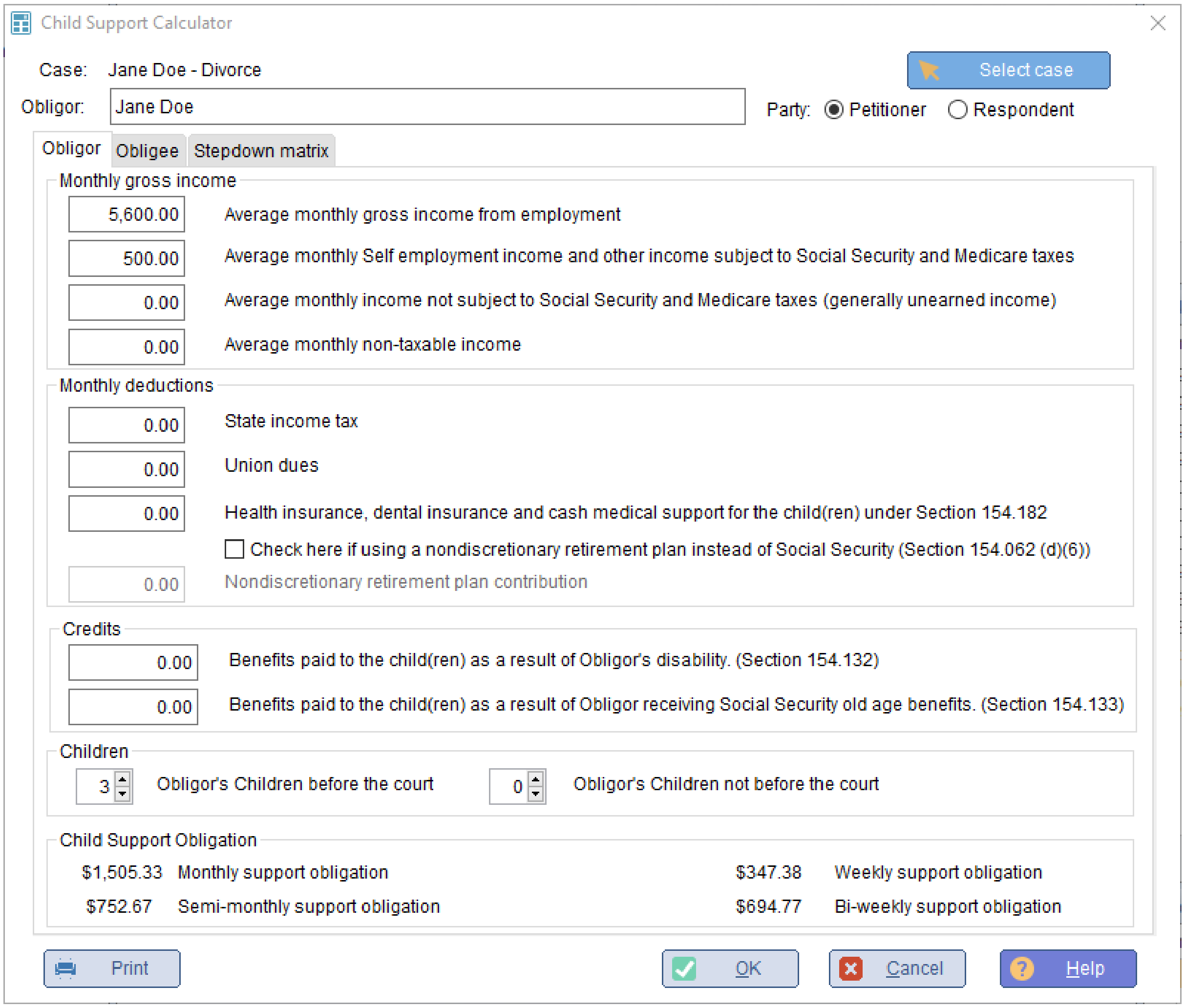
The child support calculator is available under Tools on the main menu.

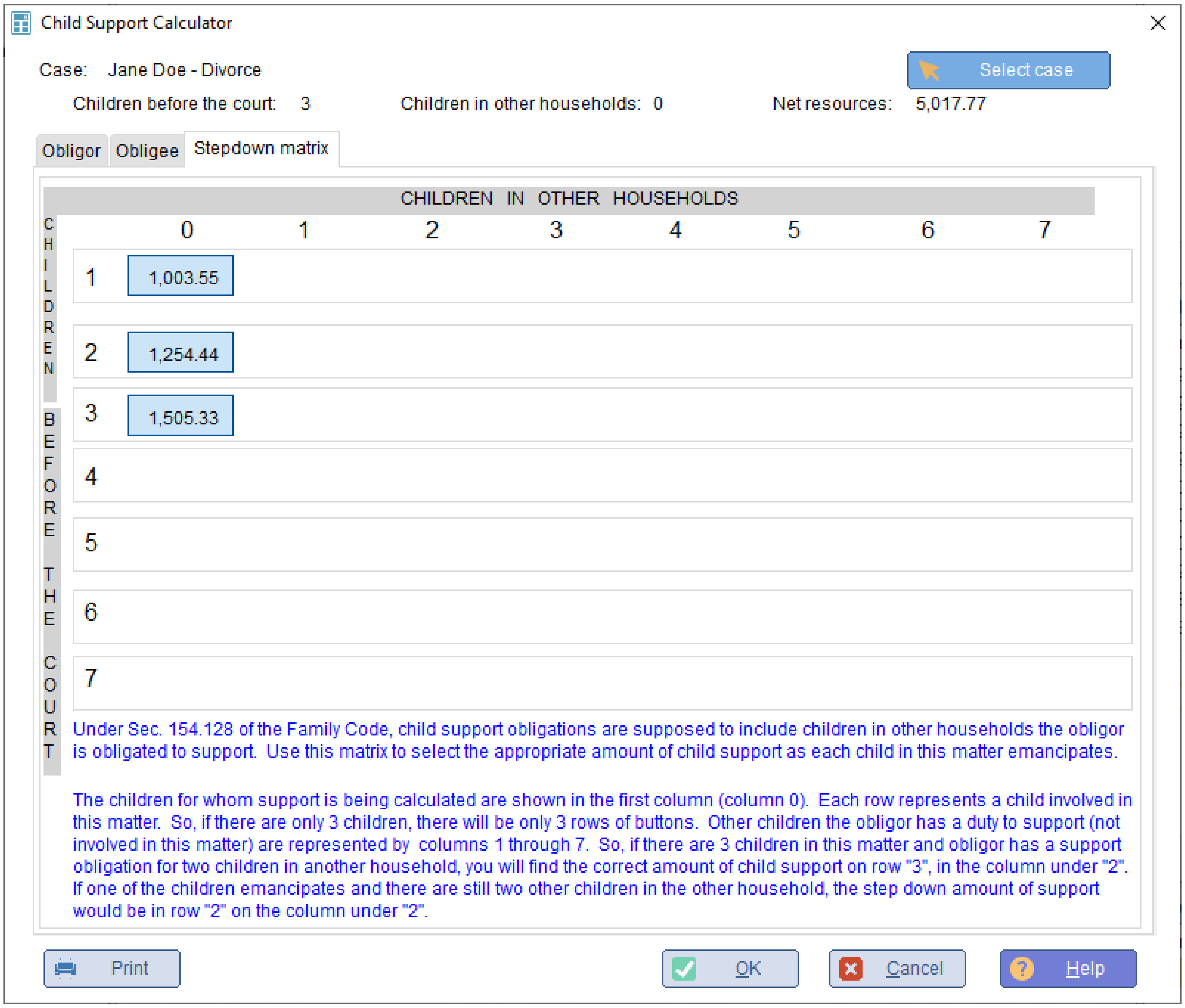
TXdocs makes calculating child support simple. You enter information and TXdocs factors in monthly gross income, deductions and credits, and calculates the obligation. While the primary purpose of the tool is to calculate a person's child support obligatiion, you can also use it to calculate the obligee's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

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

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

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


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




### 5.1.2 How Child Support is Calculated

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

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

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

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

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

## Using the Attorney General's Tax Charts

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

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

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

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

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

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

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

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

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

**Social Security**

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

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

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

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

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

3,200
-3,100

100

19.65/100 = .1965

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

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

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

## Applying the Child Support Guidelines

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

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

### Children in One Household:

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

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

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

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

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

Children in Multiple Households:

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

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

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

### Calculating and Applying Child Support Credits

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

·Section 154.132 Children of Certain Disabled Obligors: If any of the children for whom support is being calculated are receiving benefits as a result of a disabled obligor, then the amount/value of the benefits being received by the child(ren) is deducted from obligor's child support obligation.
·Section 154.133 Children of Obligors Receiving Social Security: If any of the children for whom support is being calculated are receiving social security benefits because obligor is receiving social security old age benefits, then the amount/value of those benefits being received by the child(ren) is deducted from obligor's child support obligation.

#### 5.1.3 Inventory

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

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

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

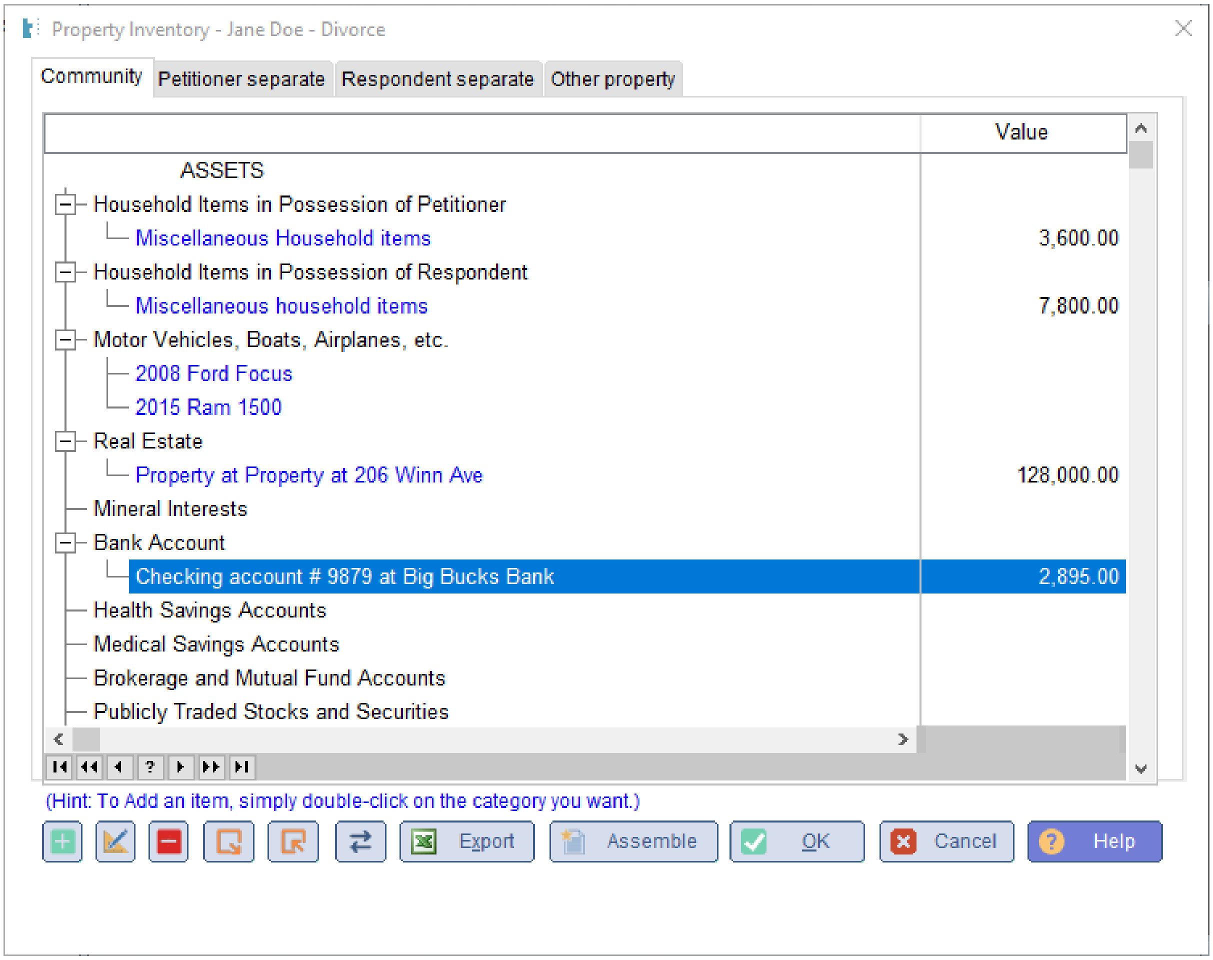
Expand - this button will cause all of the items to be displayed

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

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

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




### 5.1.4 Delinquent Child Support Calc

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

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

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

Delete - Click this button to delete the highlighted item.

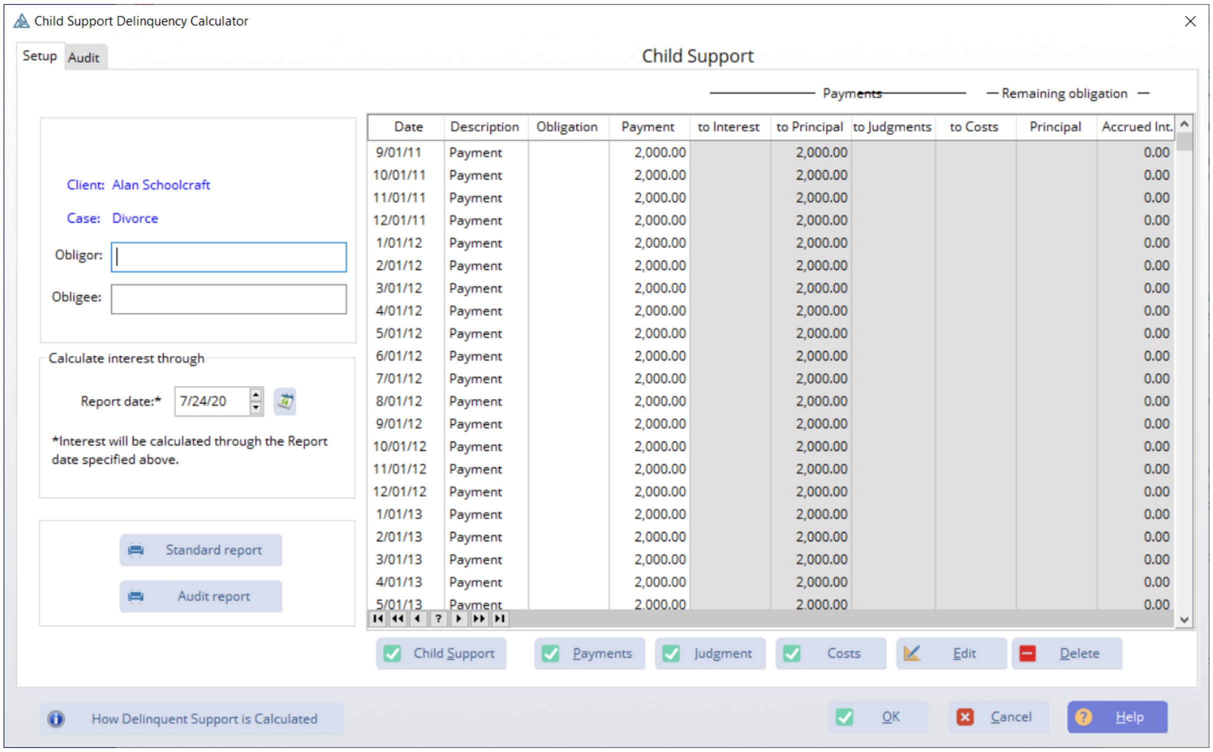
Standard report - Click this button to view and then optionally print a simple report showing each item in the list along with totals.

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

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

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




### 5.1.5 How Delinquent support is calculated

## EXPLANATION OF HOW CALCULATIONS ARE MADE BY TXdocs

HOW PAYMENTS ARE APPLIED

Payments made before Jan 1, 2010 - Applied in the following order of priority:

(1) Current Child support;
(2) Non-delinquent child support owed;
(3) Interest on principal amounts specified in subdivision (4) and (5);
(4) The principal amount of child support that has not been confirmed and reduced to money judgment;
(5) The principal amount of child support that has been confirmed and reduced to money judgment; and
(6) The amount of any ordered attorney fees or costs.

Payments made on or after Jan 1, 2010 - Applied in the following order of priority:

(1) Current child support;
(2) Non-delinquent child support owed;
(3) The principal amount of child support that has not been confirmed and reduced to money judgment;

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

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

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

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

#### 5.1.6 Proposed Division Tool

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

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

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

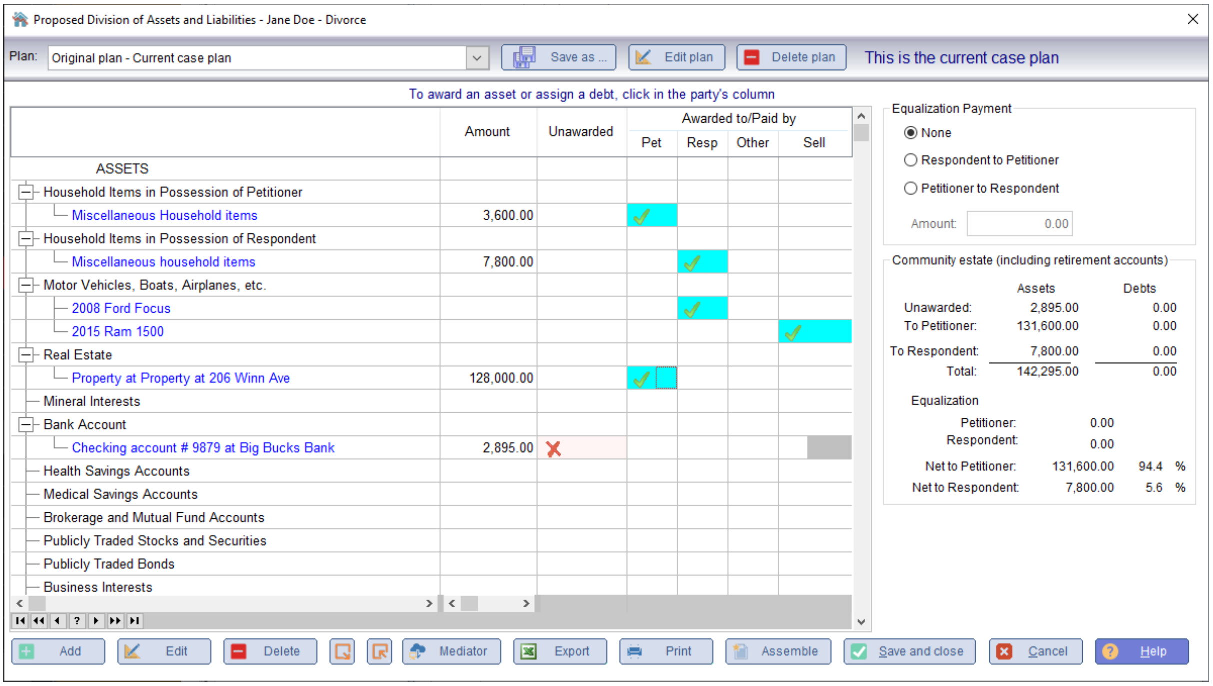
**Delete:** Highlight an item and click Delete to permanently delete it from the case.

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

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

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

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



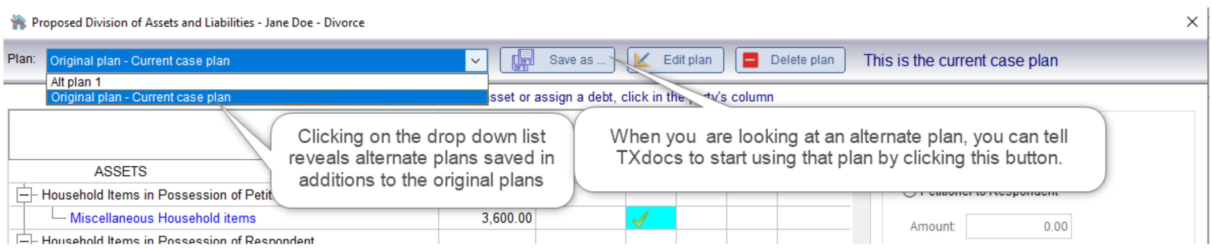
## Creating Alternate Plans

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

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

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

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




### 5.1.7 Redactor

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

Some information Redactor will redact include:

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

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

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

2. Select a case.

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

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

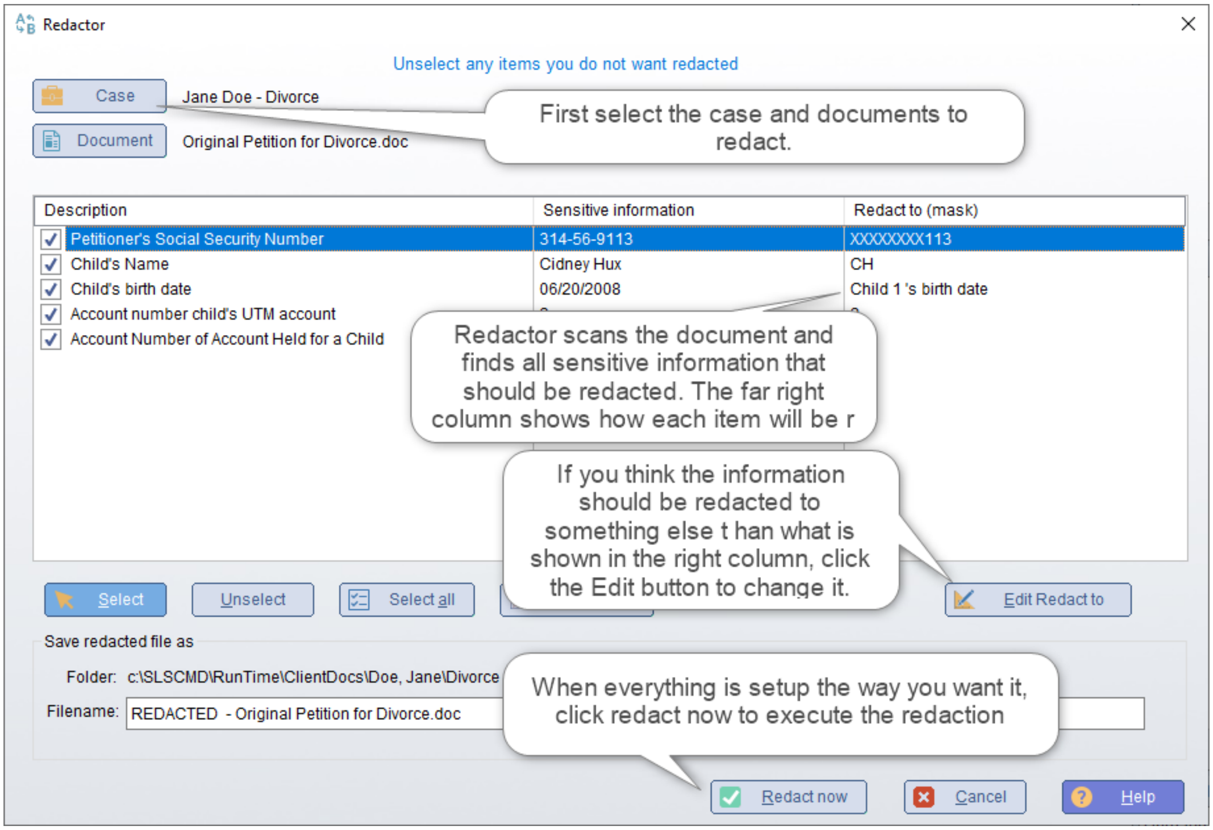
**Select/Unselect/Select all/Unselect all** - initially, all of the listed information will be selected for redaction. If, for any reason, you do not want Redactor to redact a particular answer, you can unselect it. Questions selected for redaction have a green checkmark in the left column.

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

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

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

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



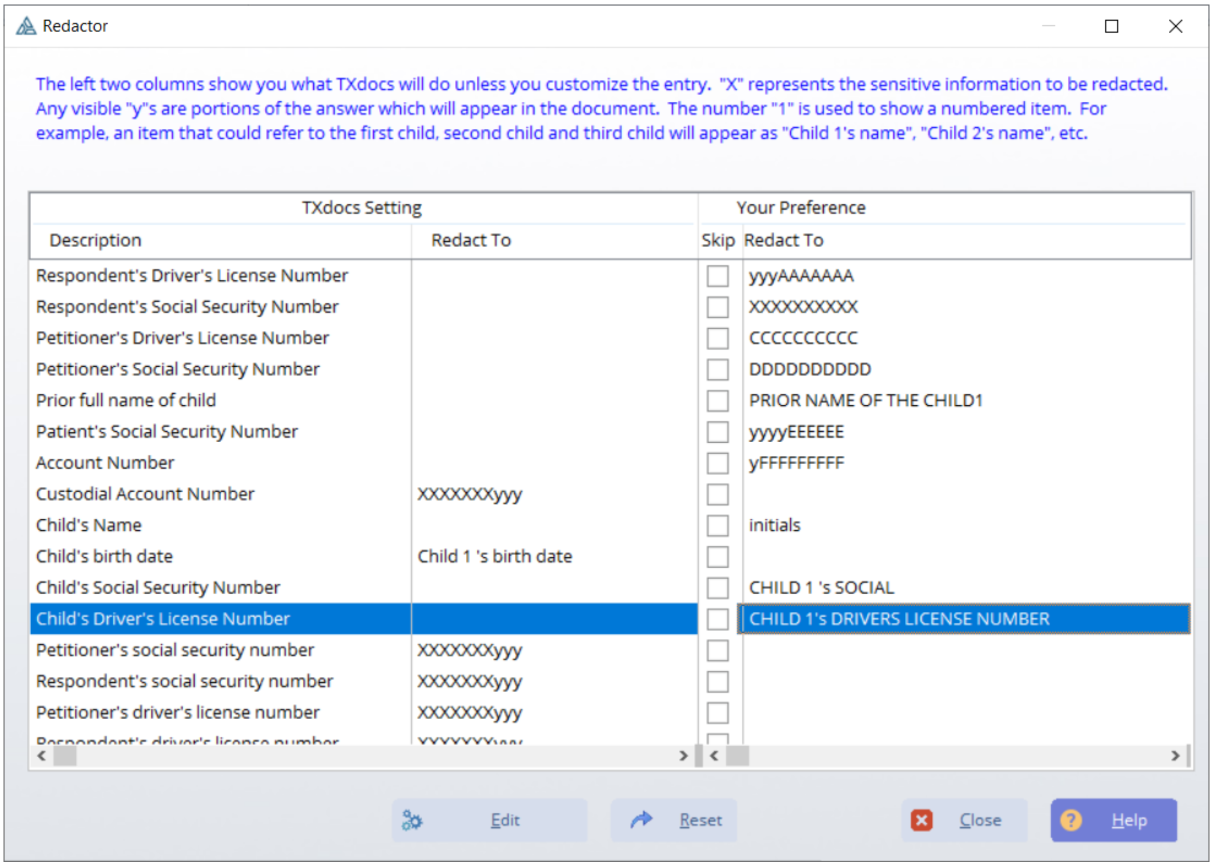

### 5.1.8 Customize Redactor

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

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

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

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




## 5.2 Probate Tools

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

### 5.2.1 Probate Inventory

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

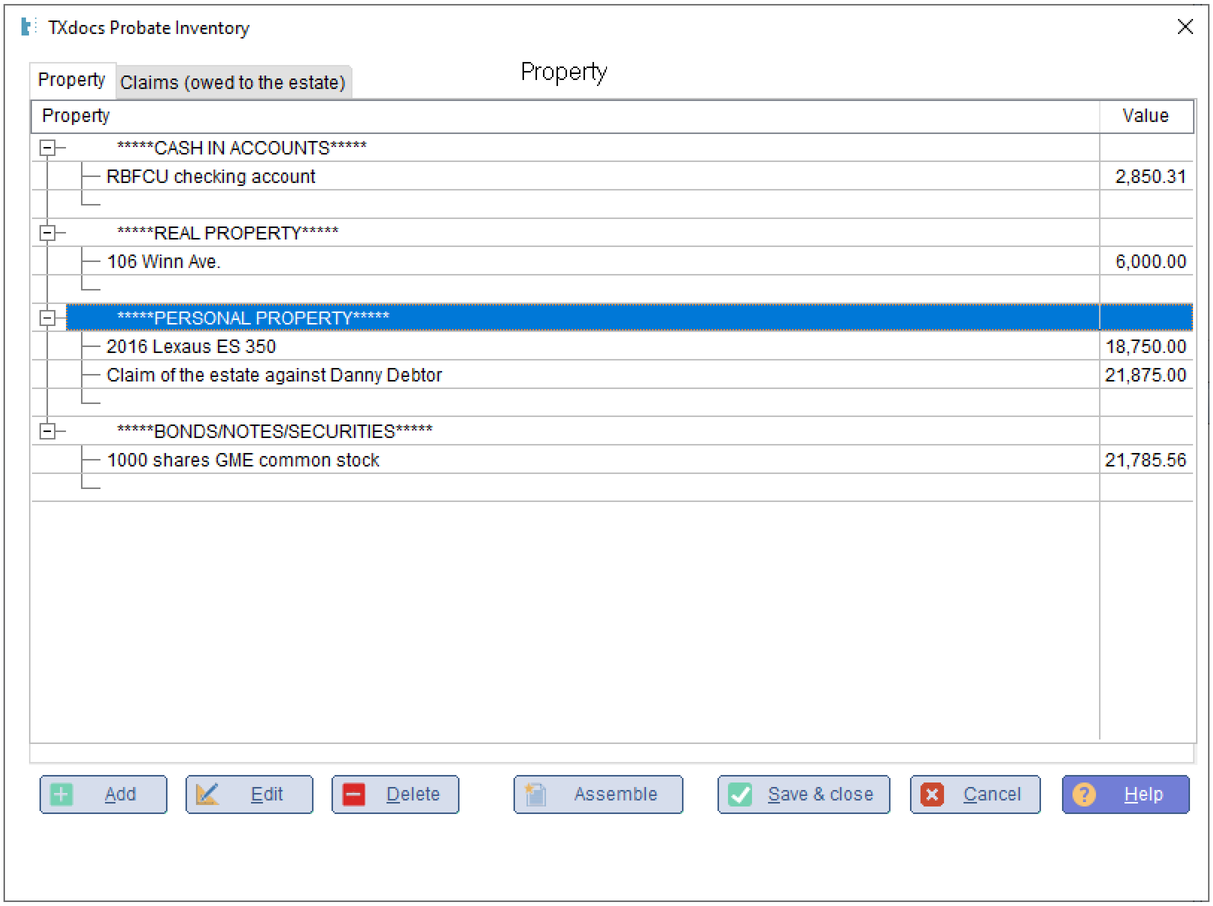
You only need to include property and claims owed to the estate on the inventory so you are provide tabs for each of those categories.

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

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

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

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



### 5.2.2 Probate Accounting

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

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

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

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

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

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

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

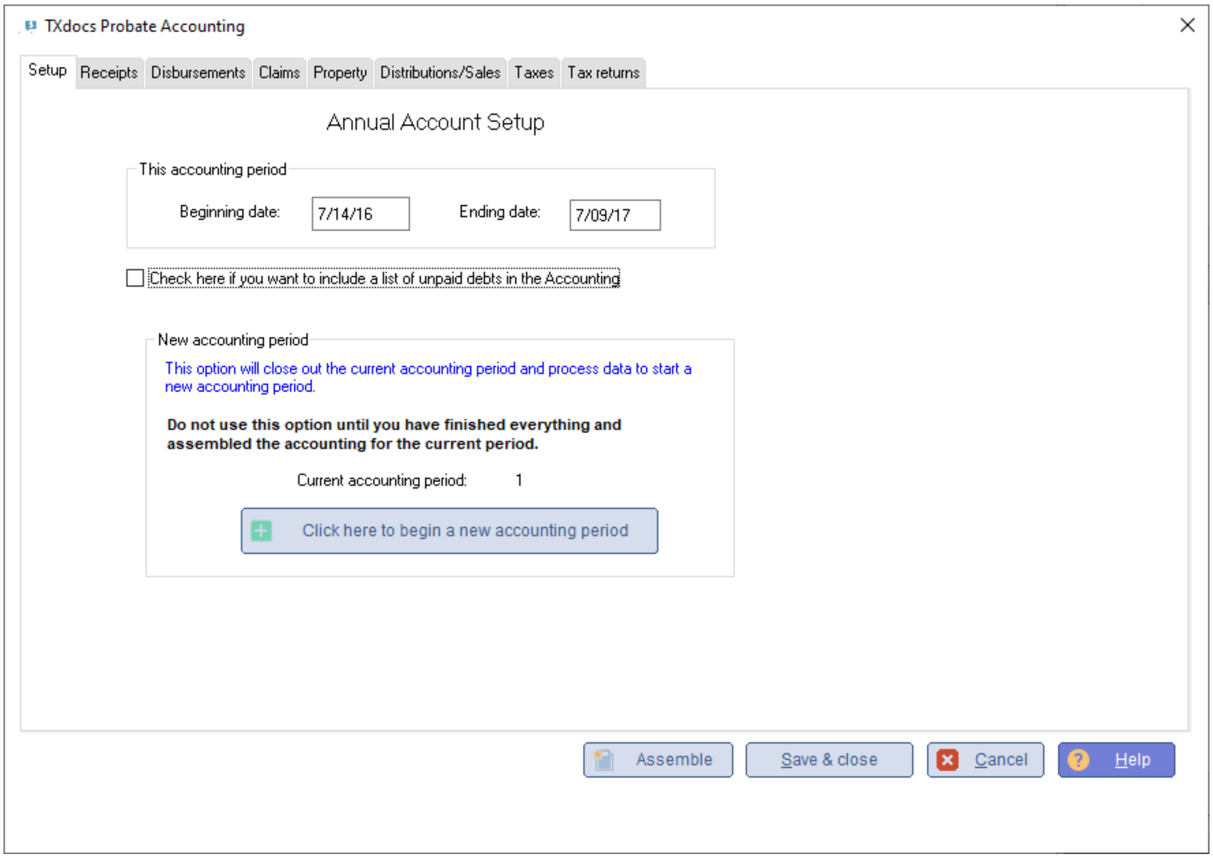
**Claims:** On this tab, include all claims against the estate presented to the representative during this accounting period.

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

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

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

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




### 5.2.3 Probate Final Account

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

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

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

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

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

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

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

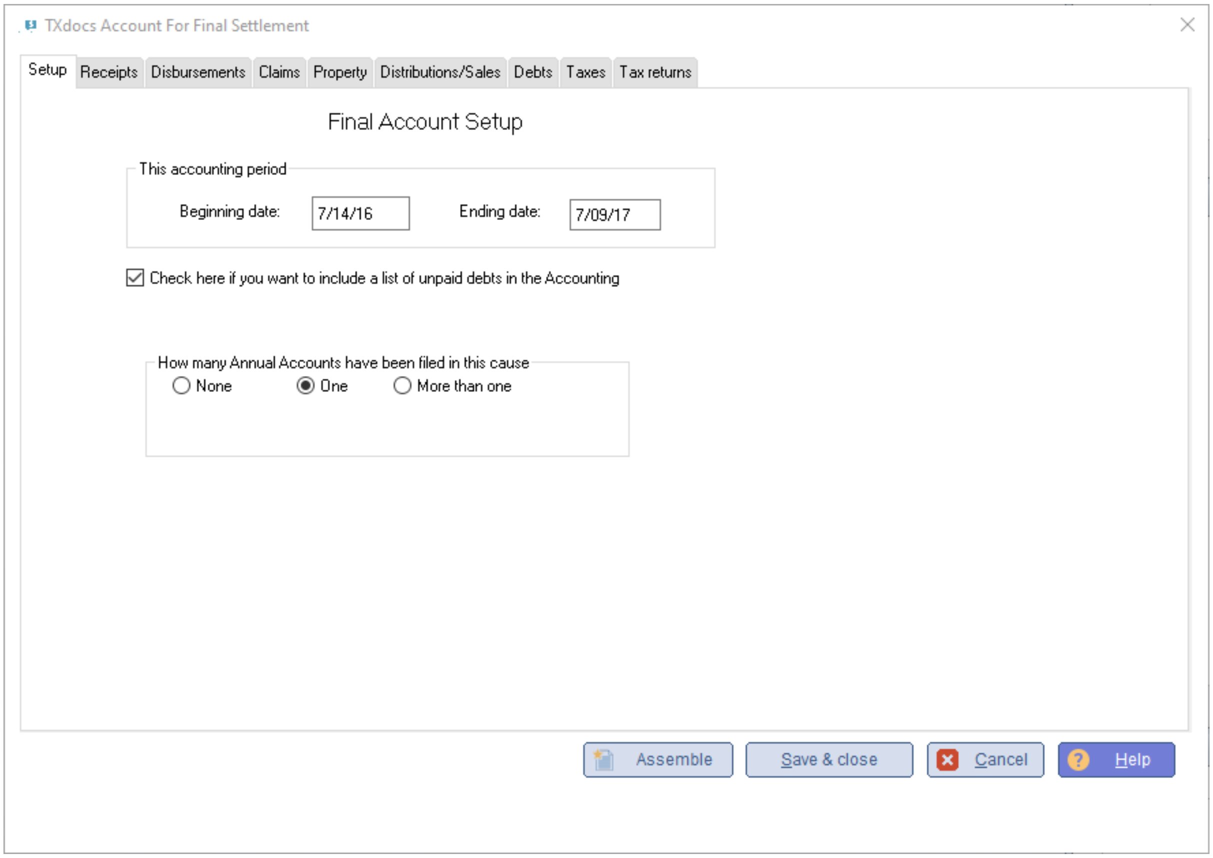
**Claims:** On this tab, include all claims against the estate presented to the representative during this accounting period.

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

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

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

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




### 5.2.4 Probate Final Account Temp

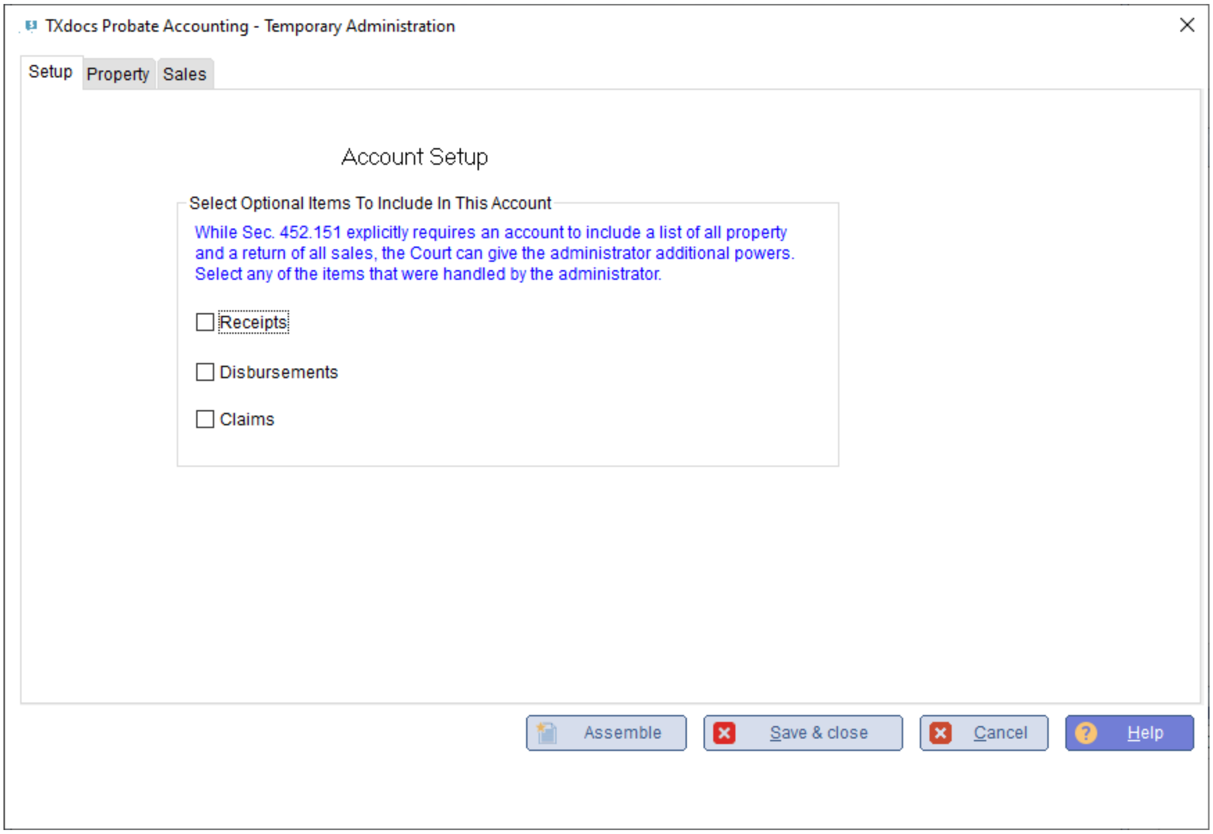
The Annual Account for Temporary Administrations tool provides a convenient way to enter all of the information you will need to prepare a final account.

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

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

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

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




## 5.3 Guardianship Tools

### 5.3.1 Guardianship Inventory

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

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

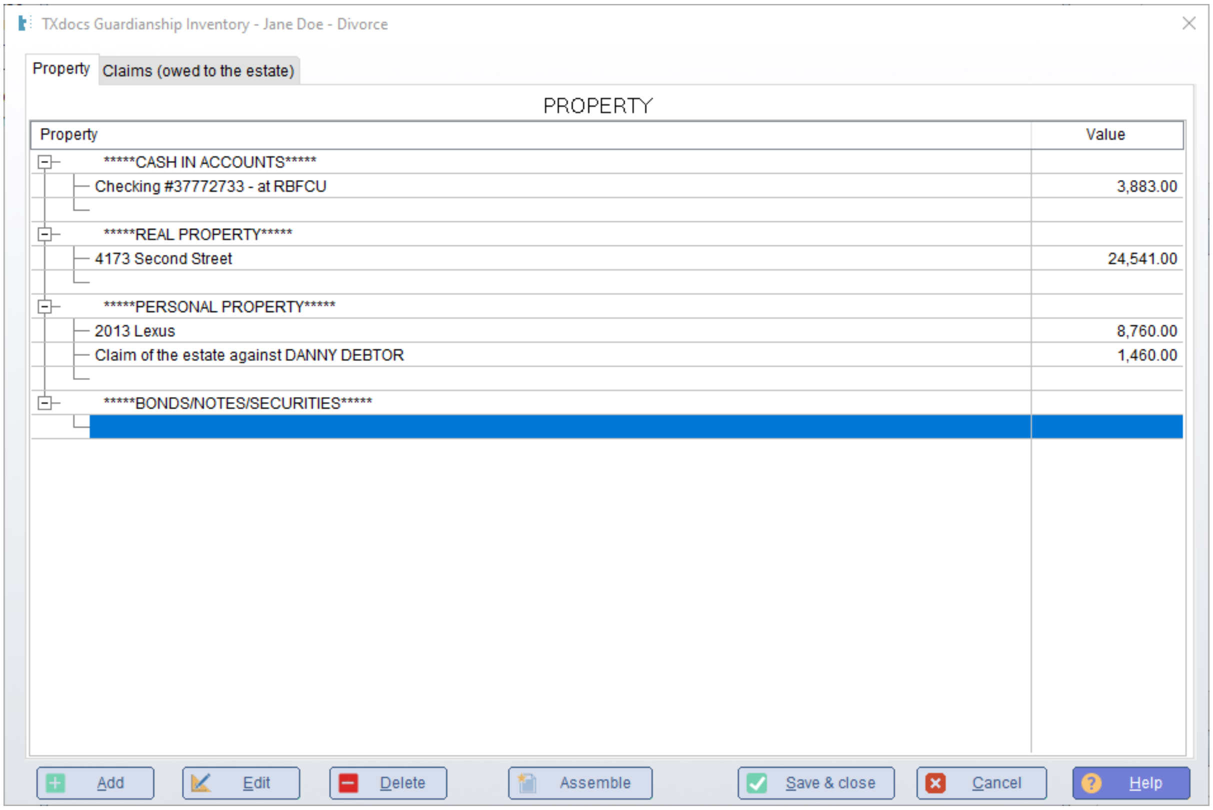
**Add -** to add an item to the inventory just click the Add button.

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

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

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




### 5.3.2 Guardianship Annual Account

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

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

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

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

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

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

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

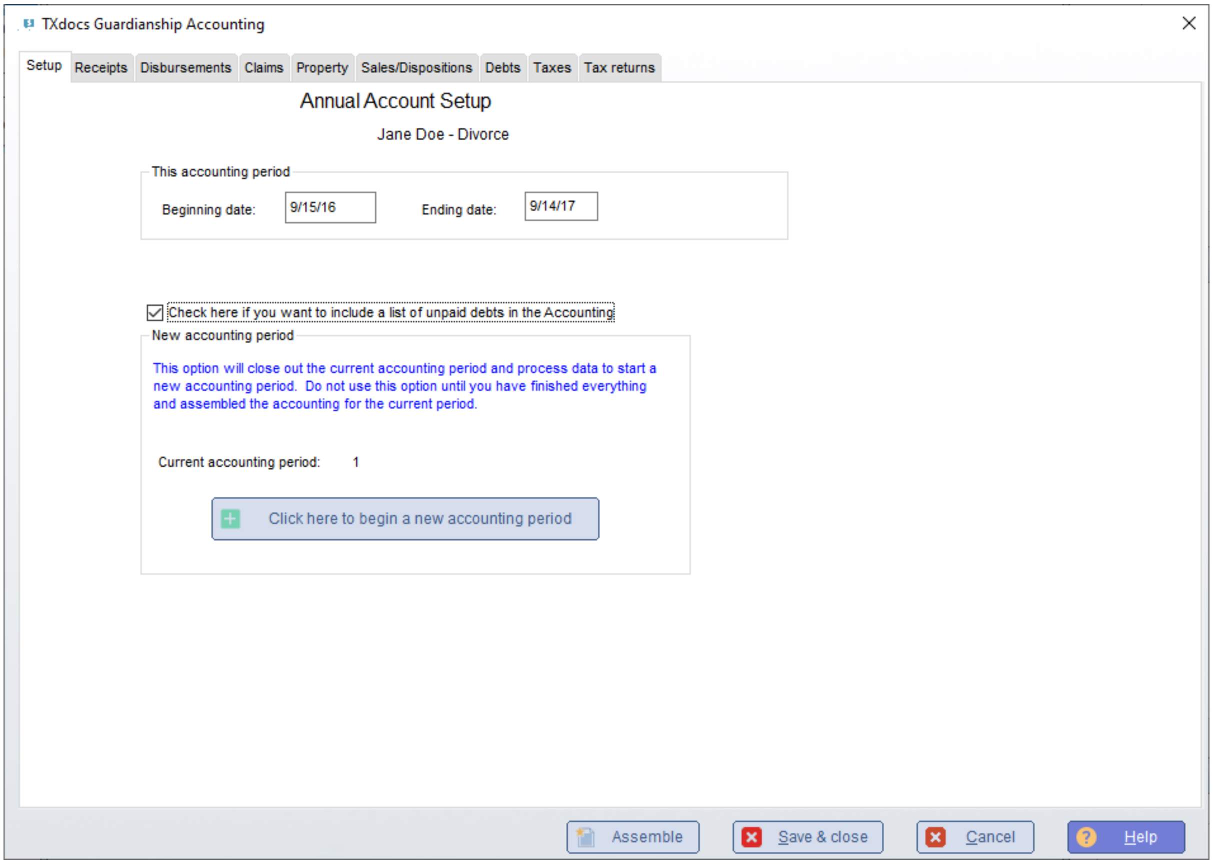
**Claims:** On this tab, include all claims against the estate presented to the representative during this accounting period.

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

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

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

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




### 5.3.3 Guardianship Annual for Final Settlement

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

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

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

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

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

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

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

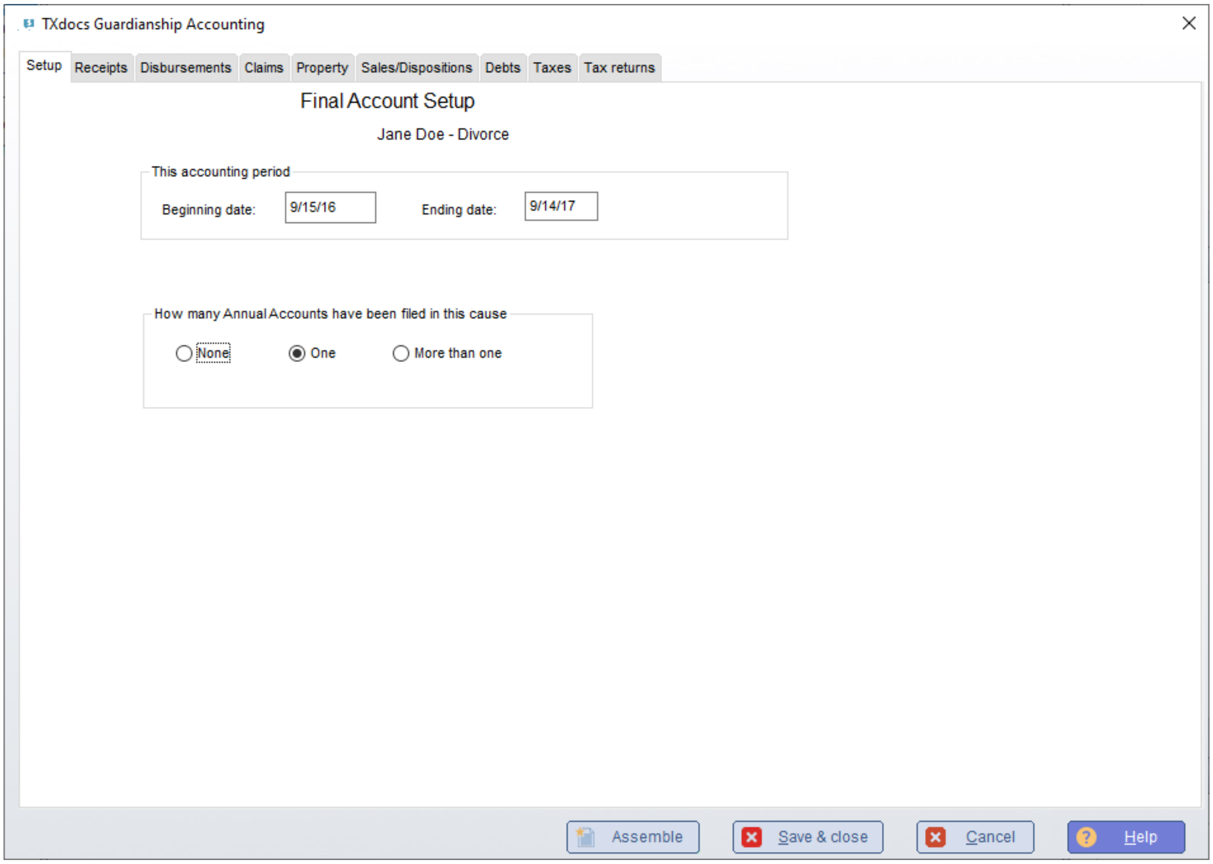
**Claims:** On this tab, include all claims against the estate presented to the representative during this accounting period.

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

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

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

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



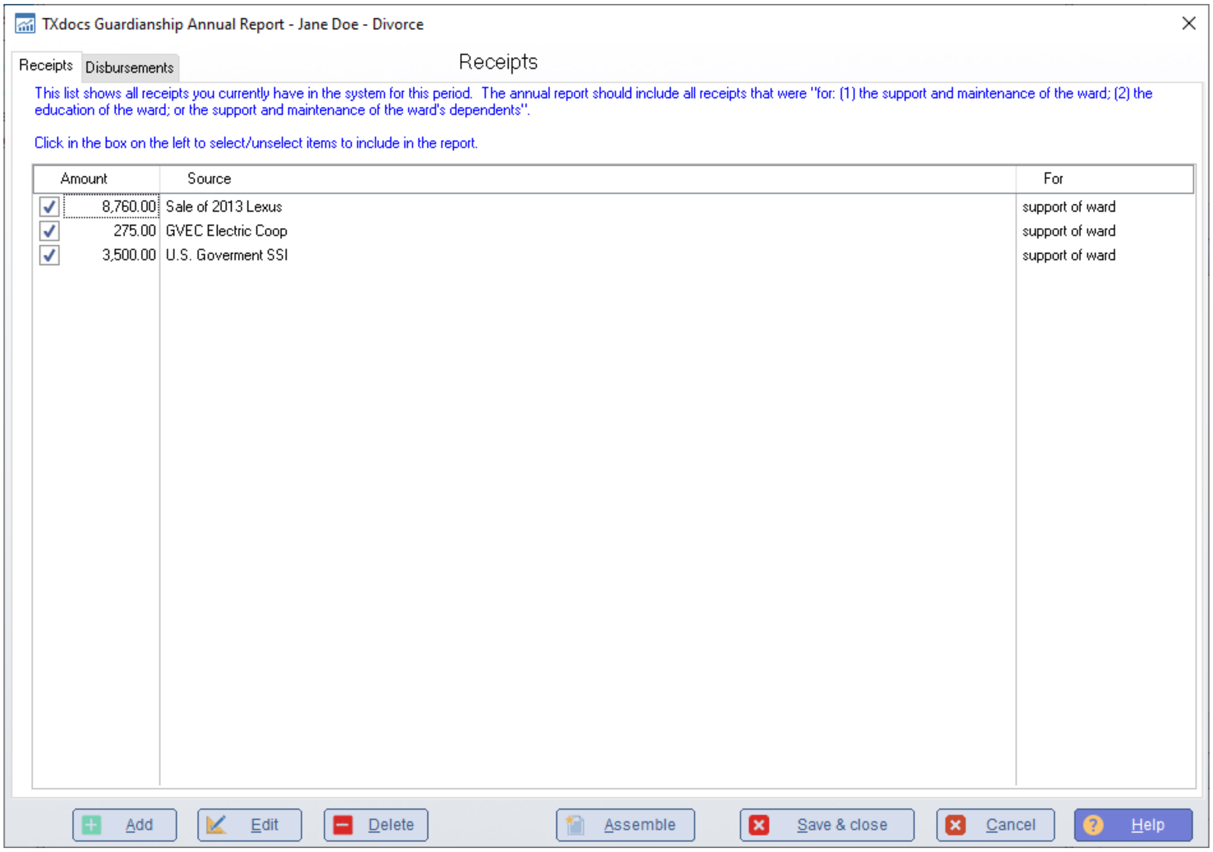

### 5.3.4 Guardianship Annual Report

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

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

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

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




## 5.4 Client Web Services

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

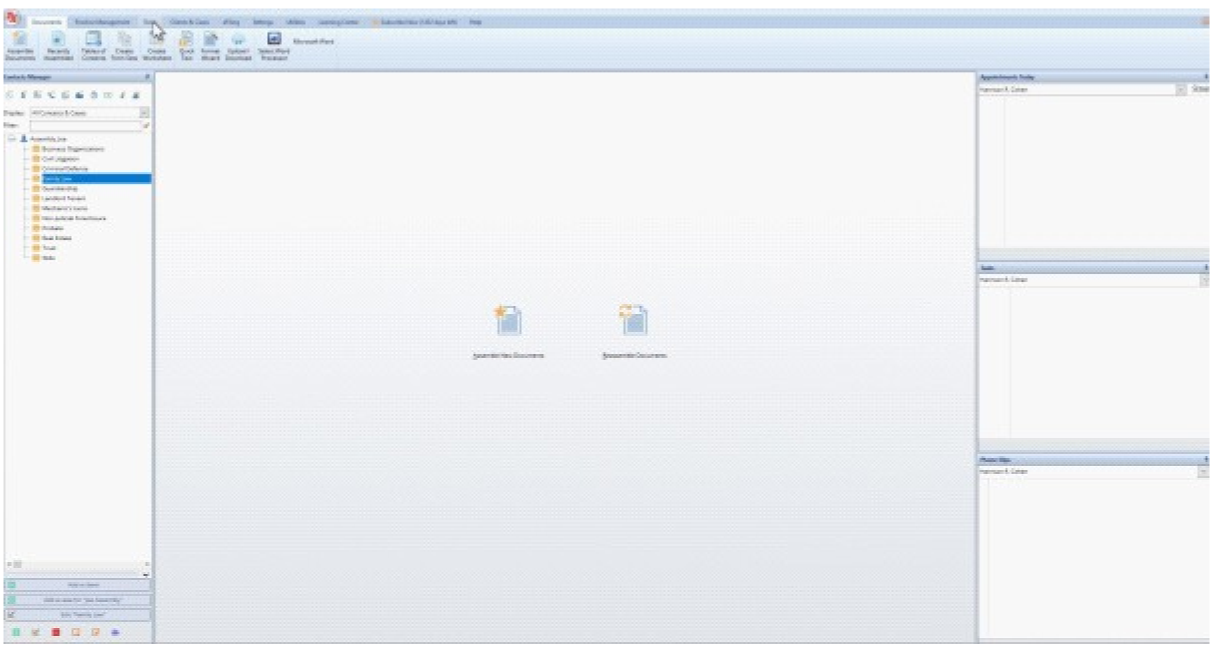
### 5.4.1 WebServicesNew

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

Here is an outline of how the system works:

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

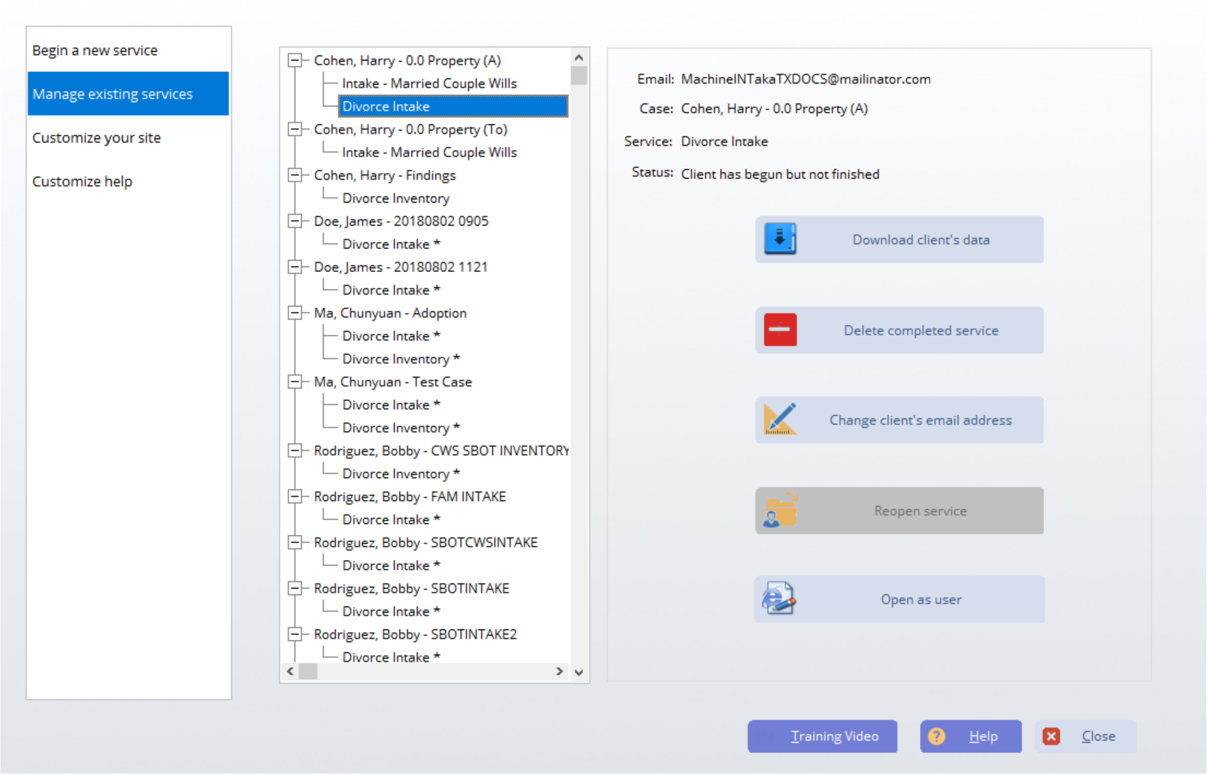
HINT: If you enter your clients' email addresses as you add the client to TXdocs, you won't have to enter it again on this screen.



### 5.4.2 WebServicesExisting

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




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

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

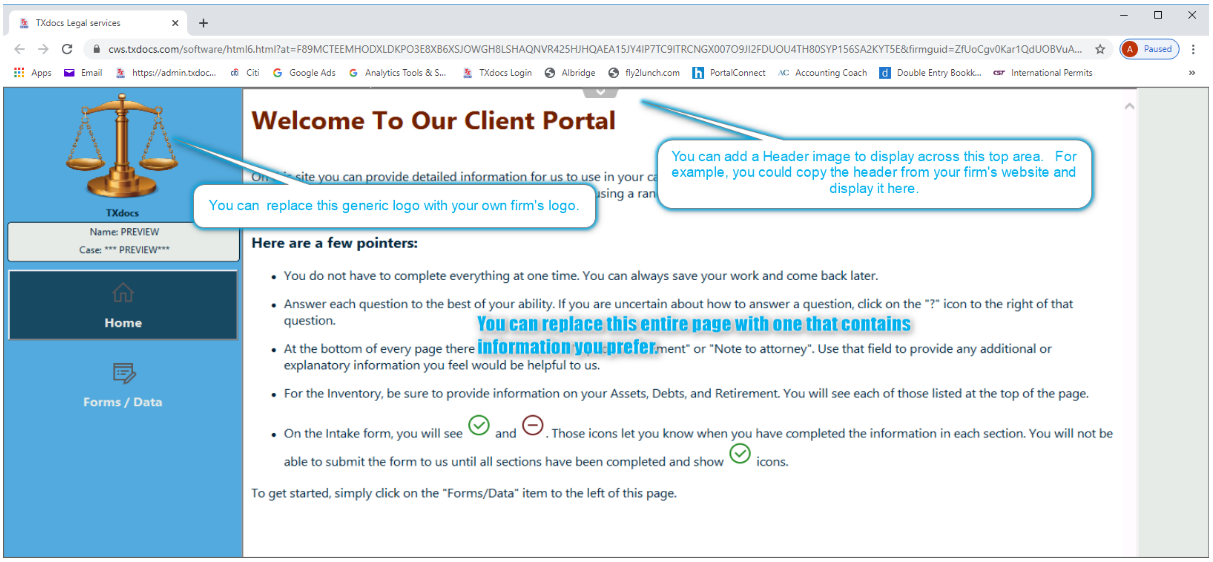
**Change client's email address:** Use this to change the client's email address in TXdocs.

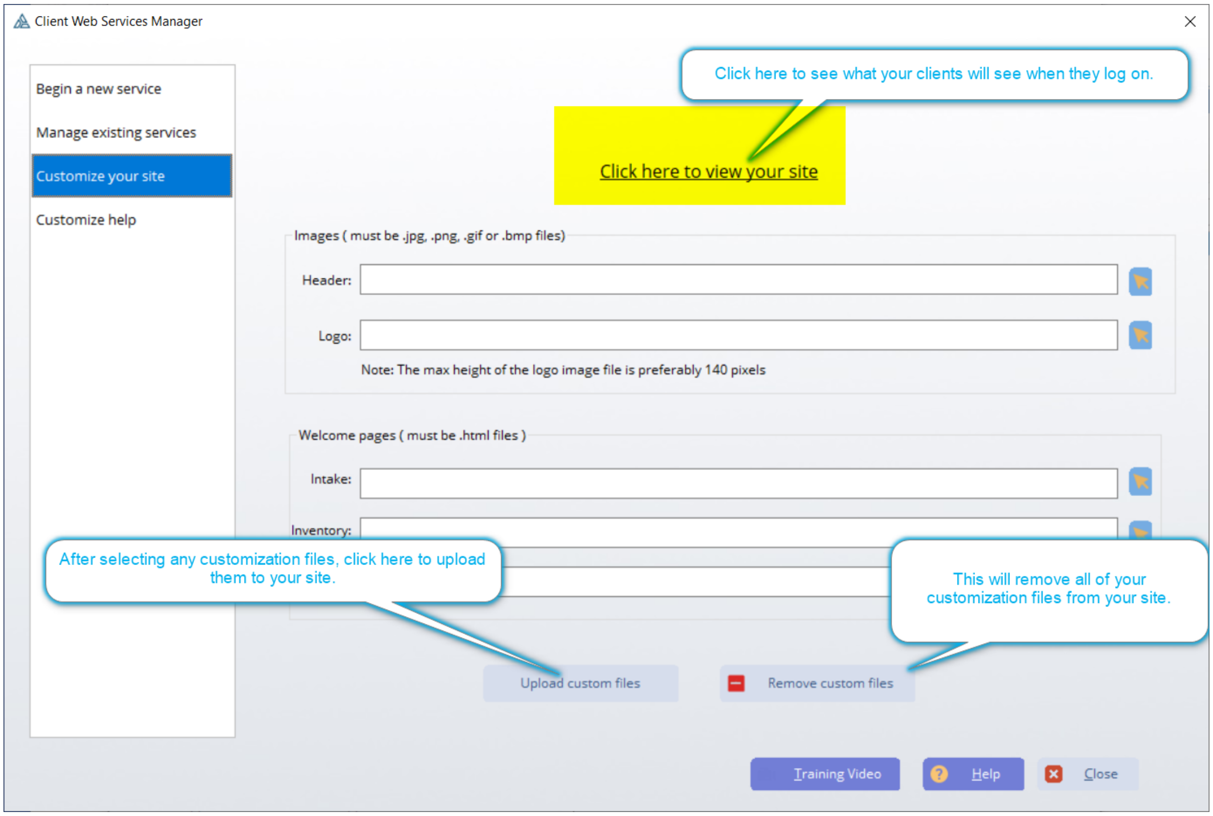
**Reopen service:** After you have downloaded a client's data, the case is closed and your client will not be able to log on the add or change data. This protects you from having them change information without you knowing it. If you decide that you should allow your client to log on and update their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

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

### 5.4.3 WebServicesCustomize

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




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

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

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

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

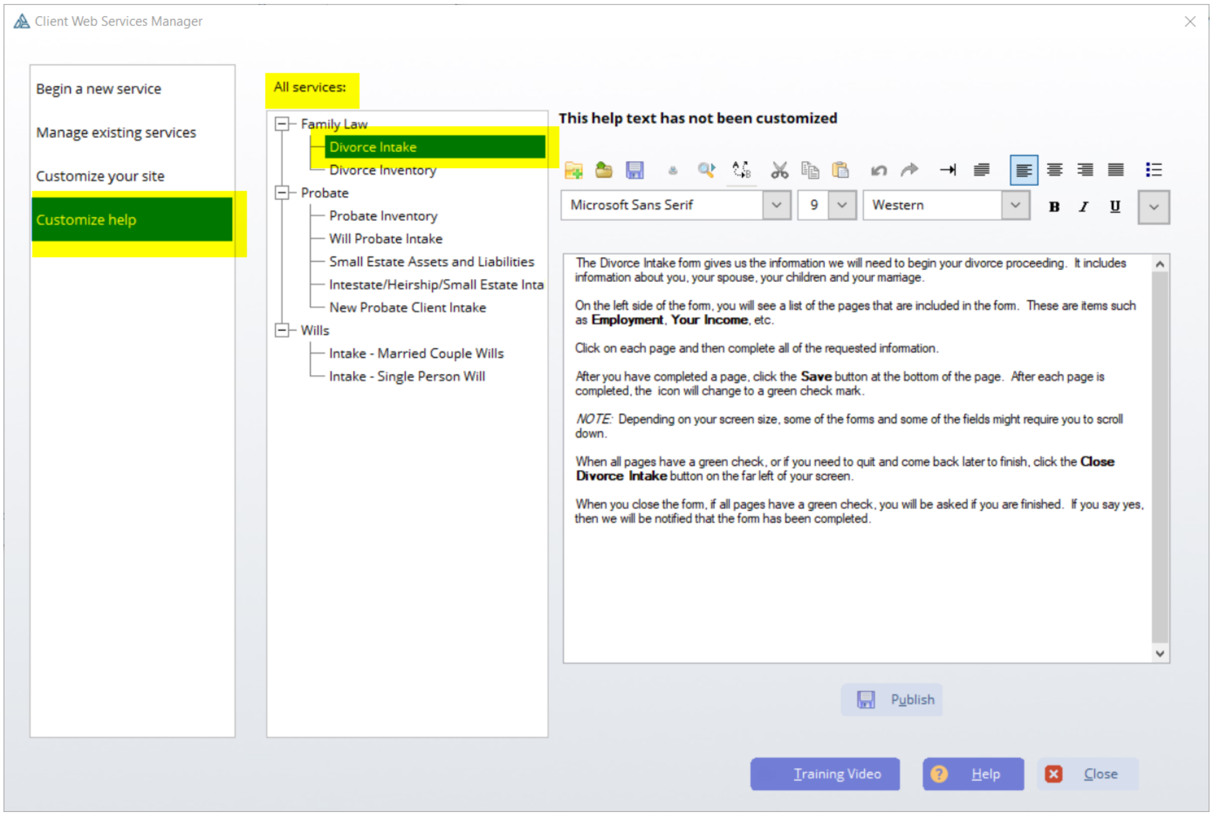
Client Web Services provides web pages for obtaining Inventory Information (Family Law and Probate) as well as new case intake information for Family Law, Probate and Wills. You can create replacement welcome pages for each of those:
- the files must be .htm or .html format
- the easiest way to create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

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

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

### 5.4.4 WebServicesHelp

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




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

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

## 5.5 Deadline Calculator

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

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

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

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

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

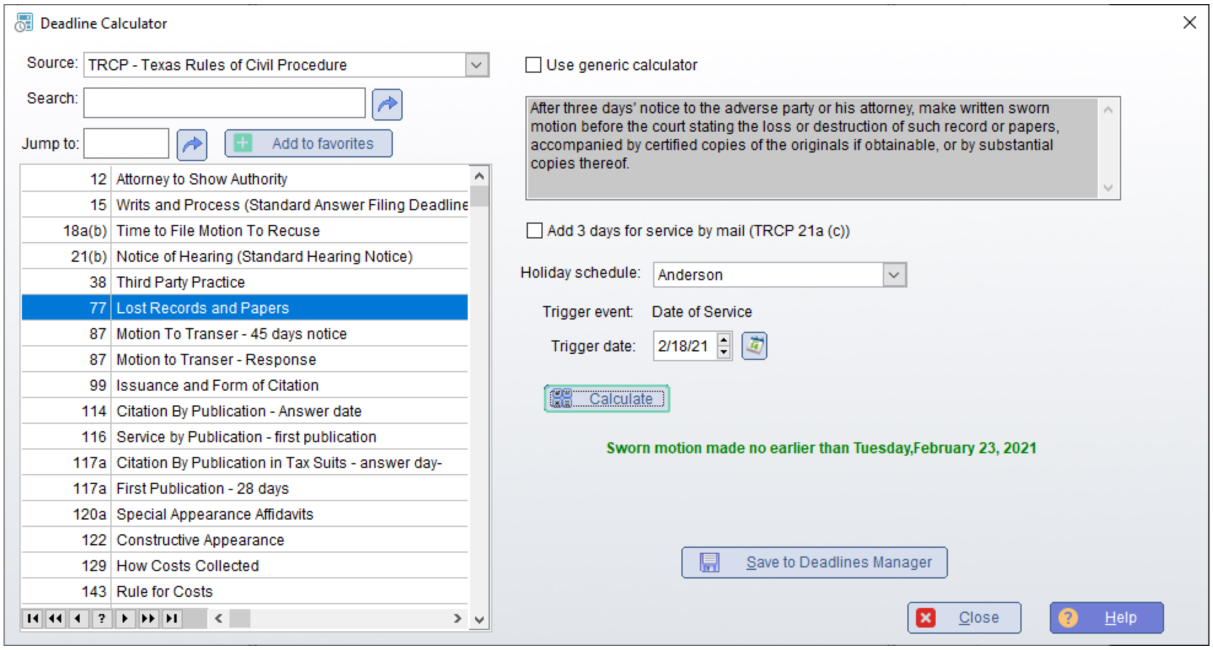
**Add 3 days for service by mail:** Check this box if you are serving notice by mail.

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

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

**Calculate:** Click this button to perform the calculation

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

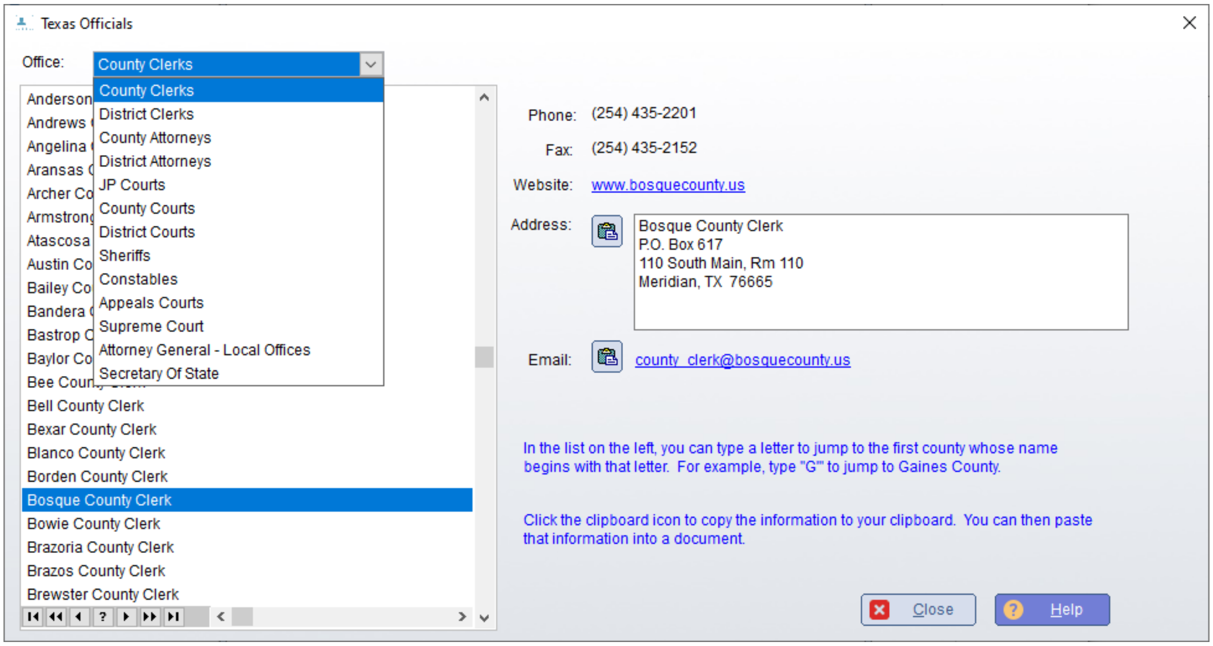



## 5.6 Officals Directory

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

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

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

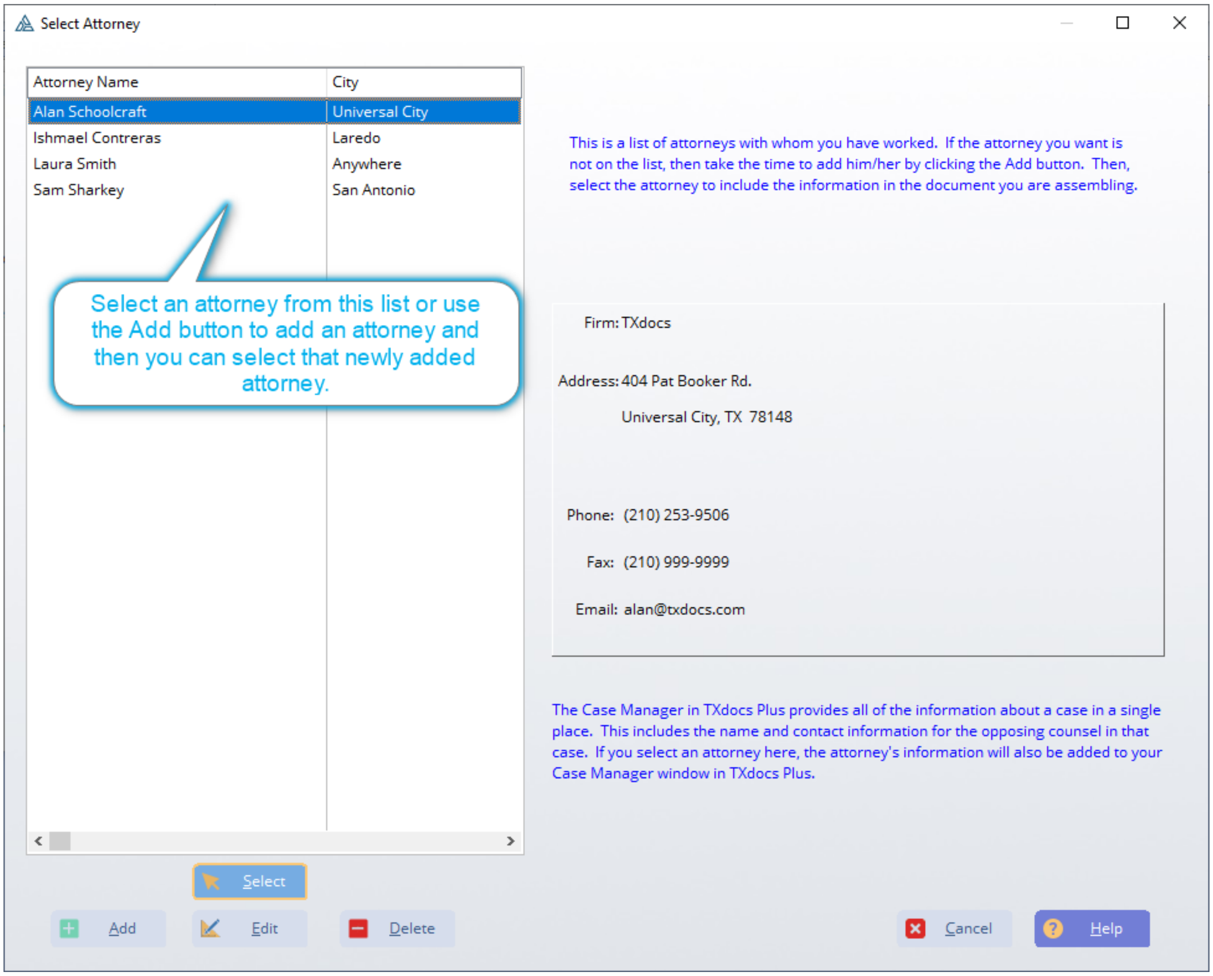



## 5.7 Opposing Counsel

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


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

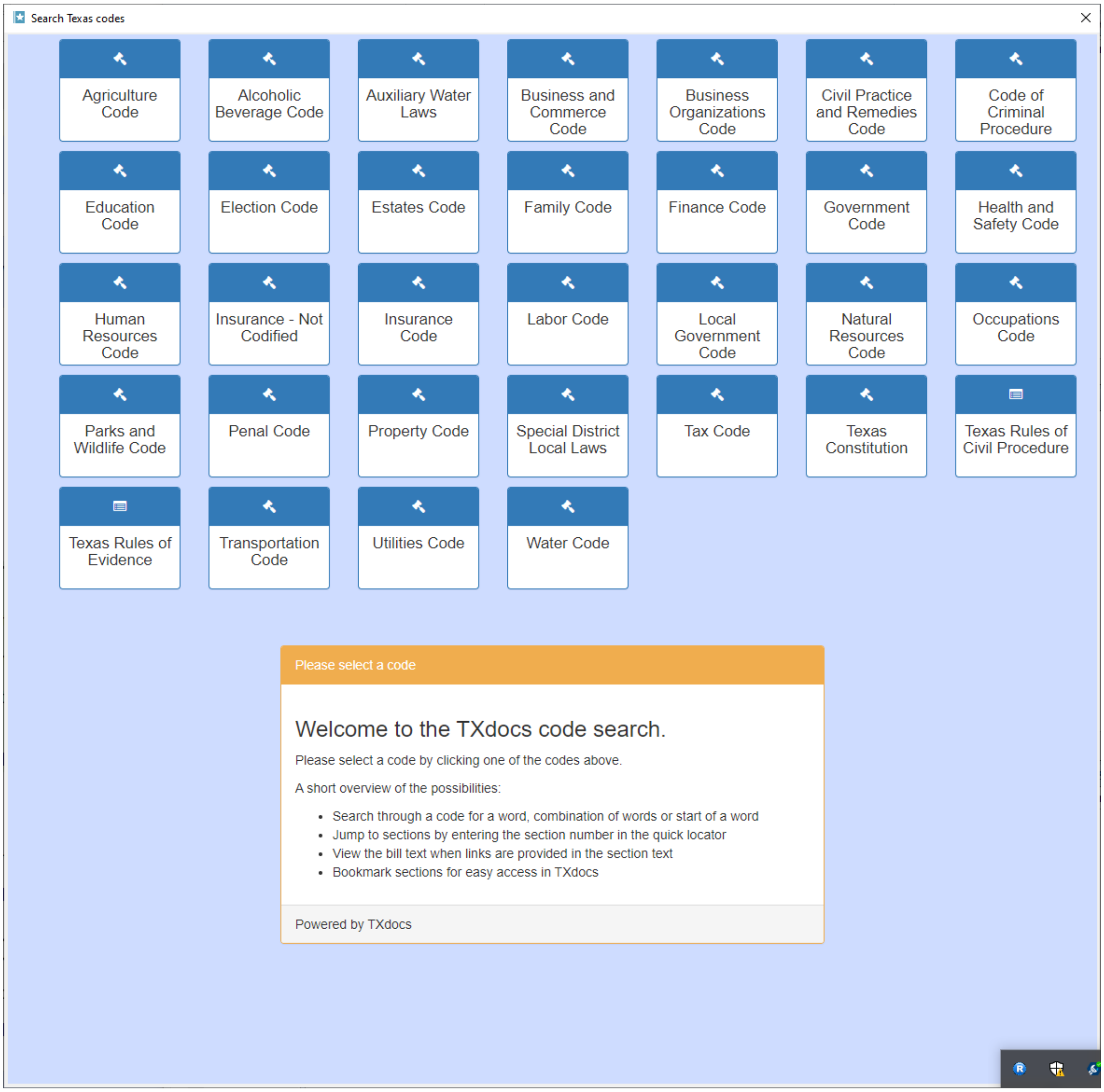
 




## 5.8 Texas Codes

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

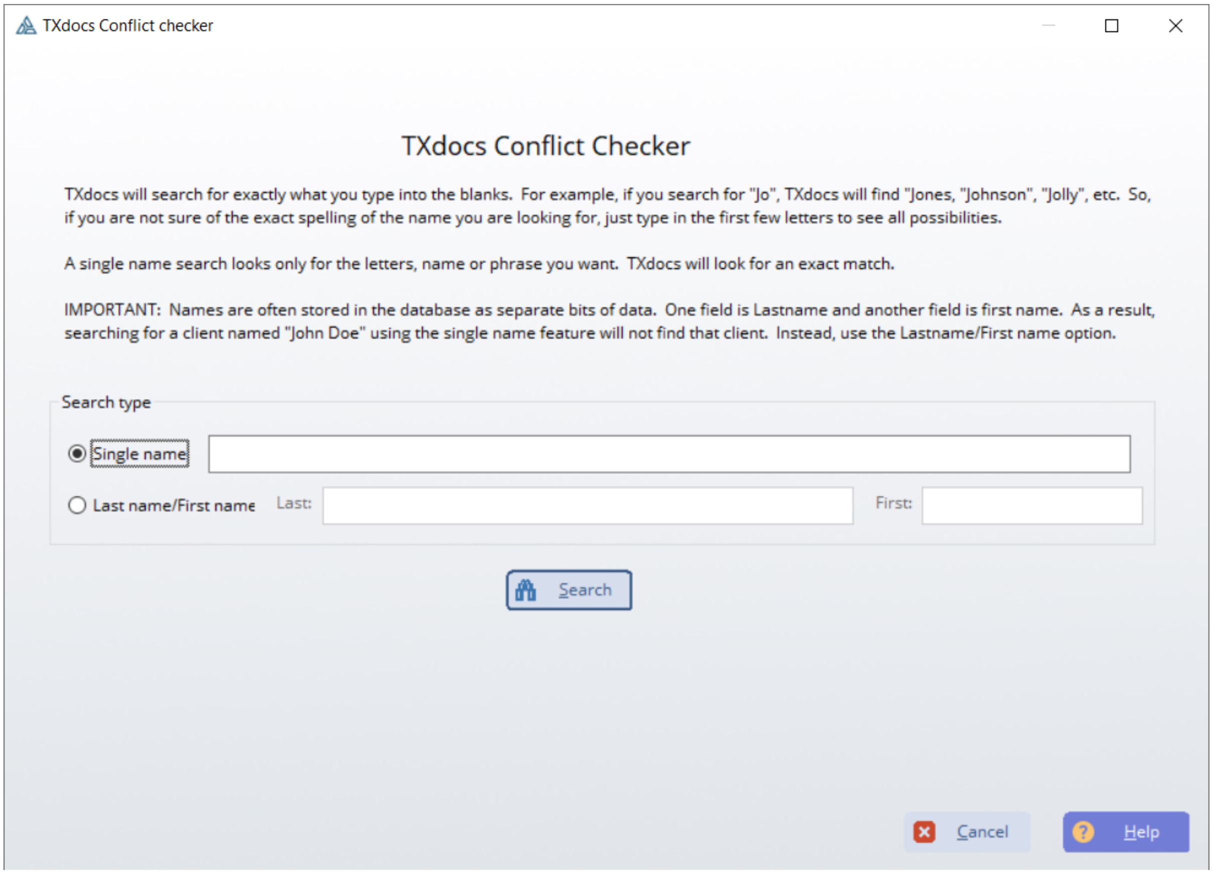
After you select a code, you will be able to jump to specific sections and search using an advanced search feature. You can also copy sections of the code to your clipboard by clicking on the clipboard icon that becomes visible as you select a section. You can also create bookmarks of favorite sections.


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


## 5.9 Conflict Checker

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

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

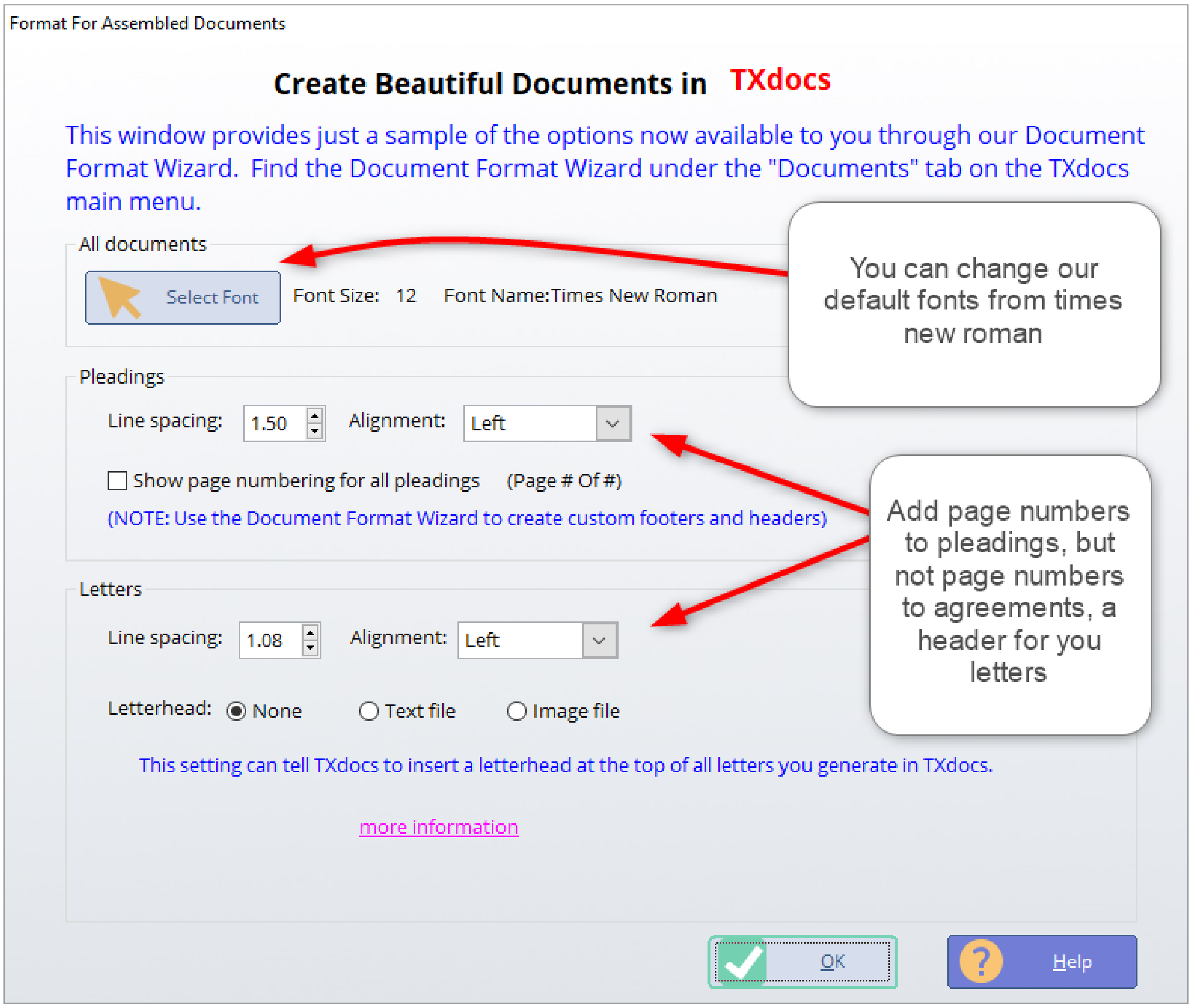


# Formating in TXdocs

# 6 Formating in TXdocs

## 6.1 SetupDocFormatInitial

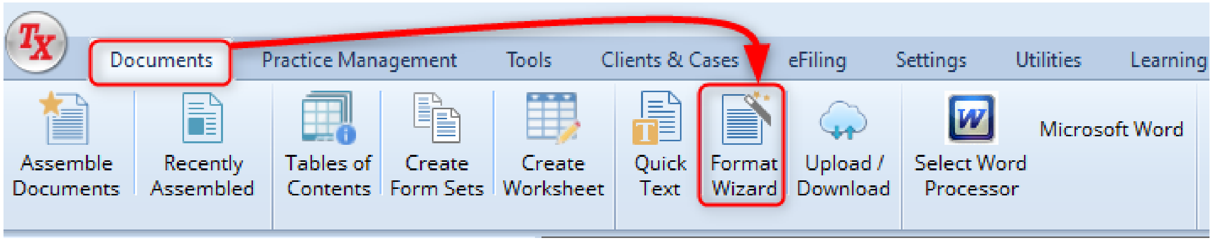
After TXdocs is initialized you will receive the following window. This screen sets the format for documents you want to assemble. These options can be changed later on through the use of the [Document Format Wizard]




## 6.2 Documents Format Wizard

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

Located at the top of TXdocs:




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

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

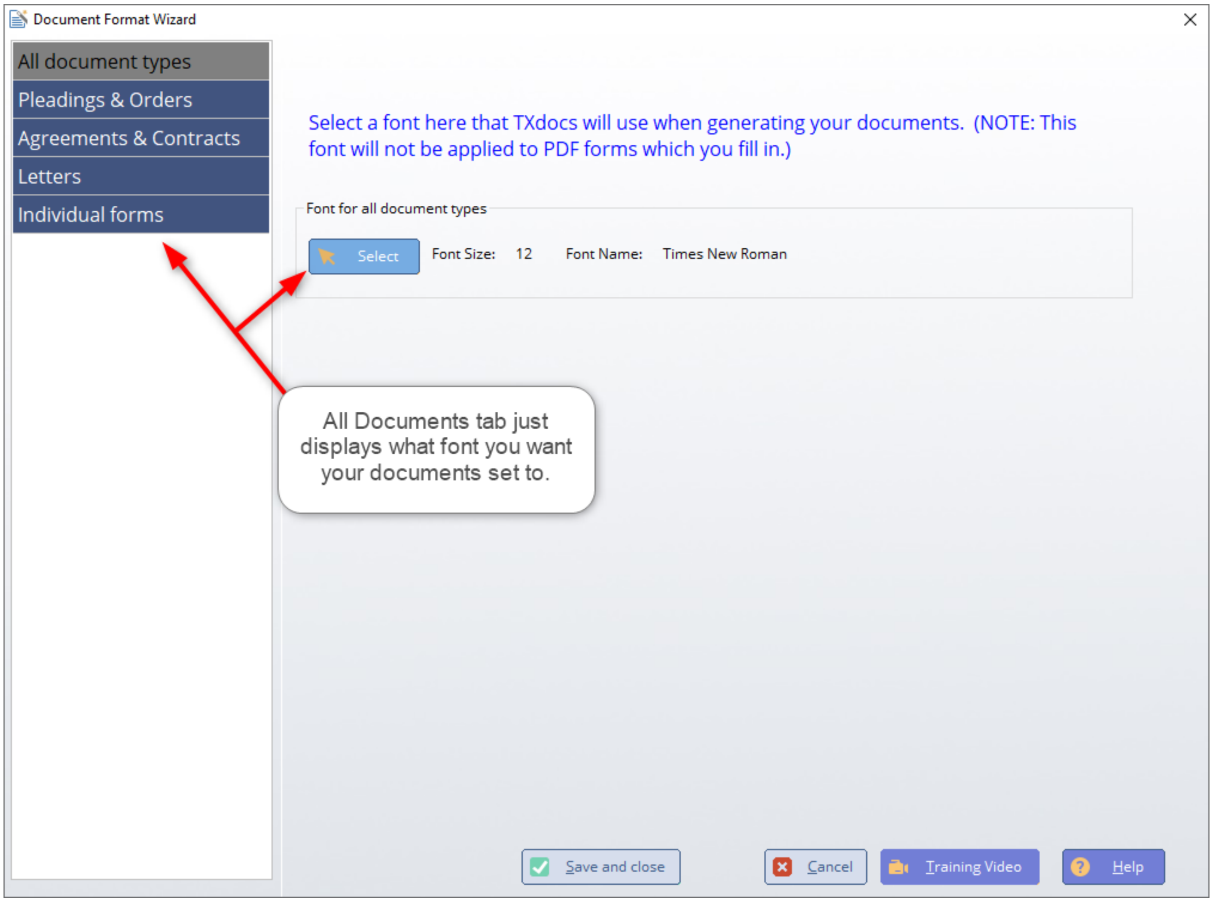
The settings you make in this window generally apply to all documents of the particular type.  For example, when you make a selection for bolding the captions in Pleadings, that selection applies to all pleadings you assemble.  BUT - you can override this selection in the Individual Forms section of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

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

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

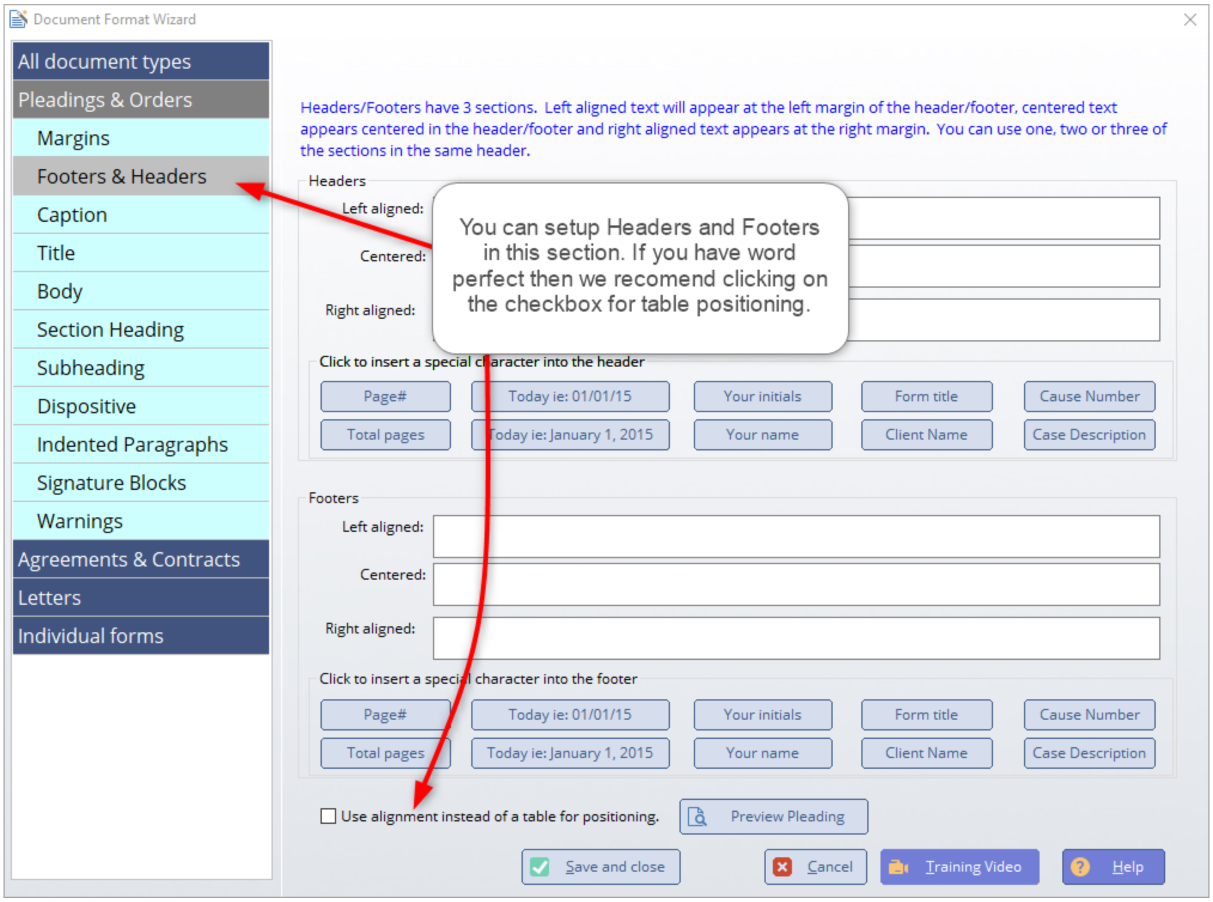
All document types

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



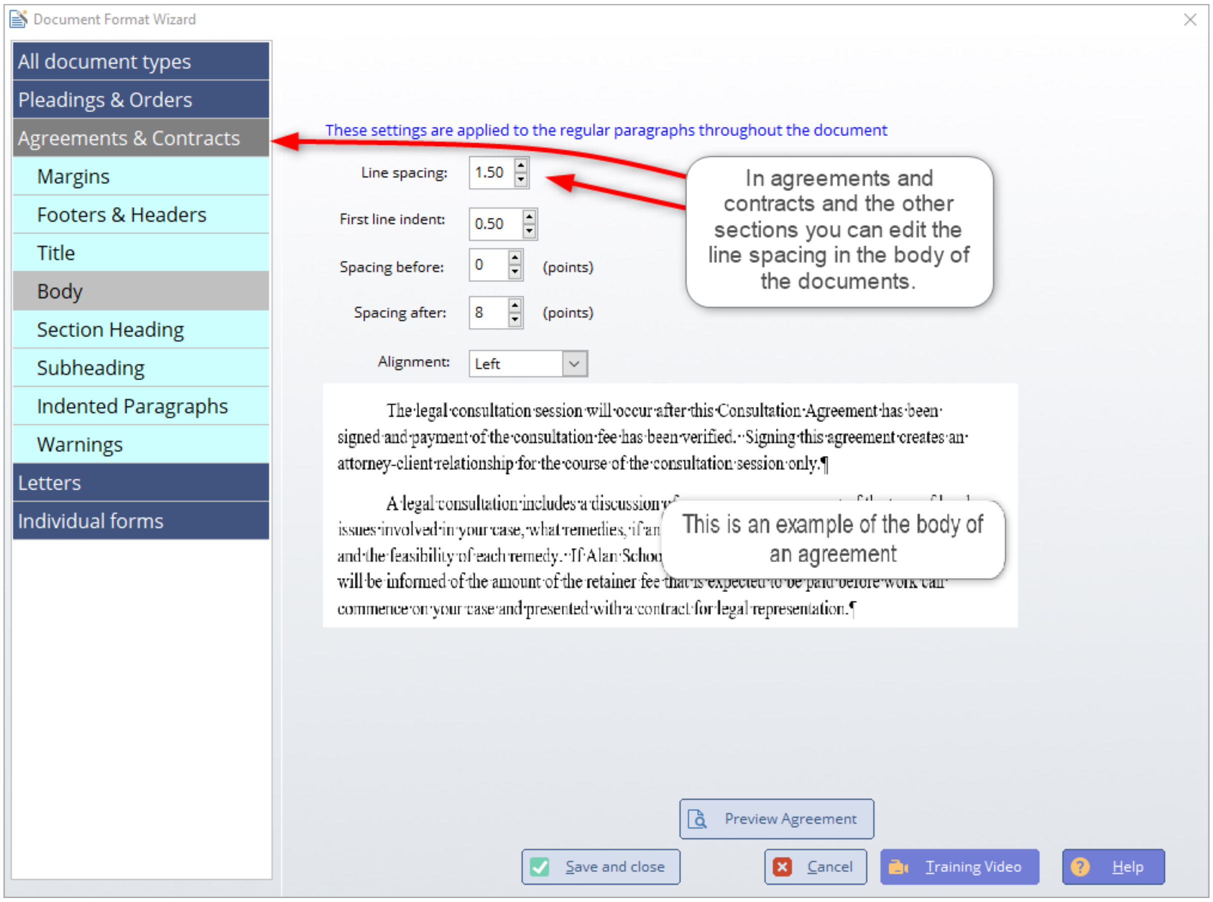

Pleadings and Orders

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



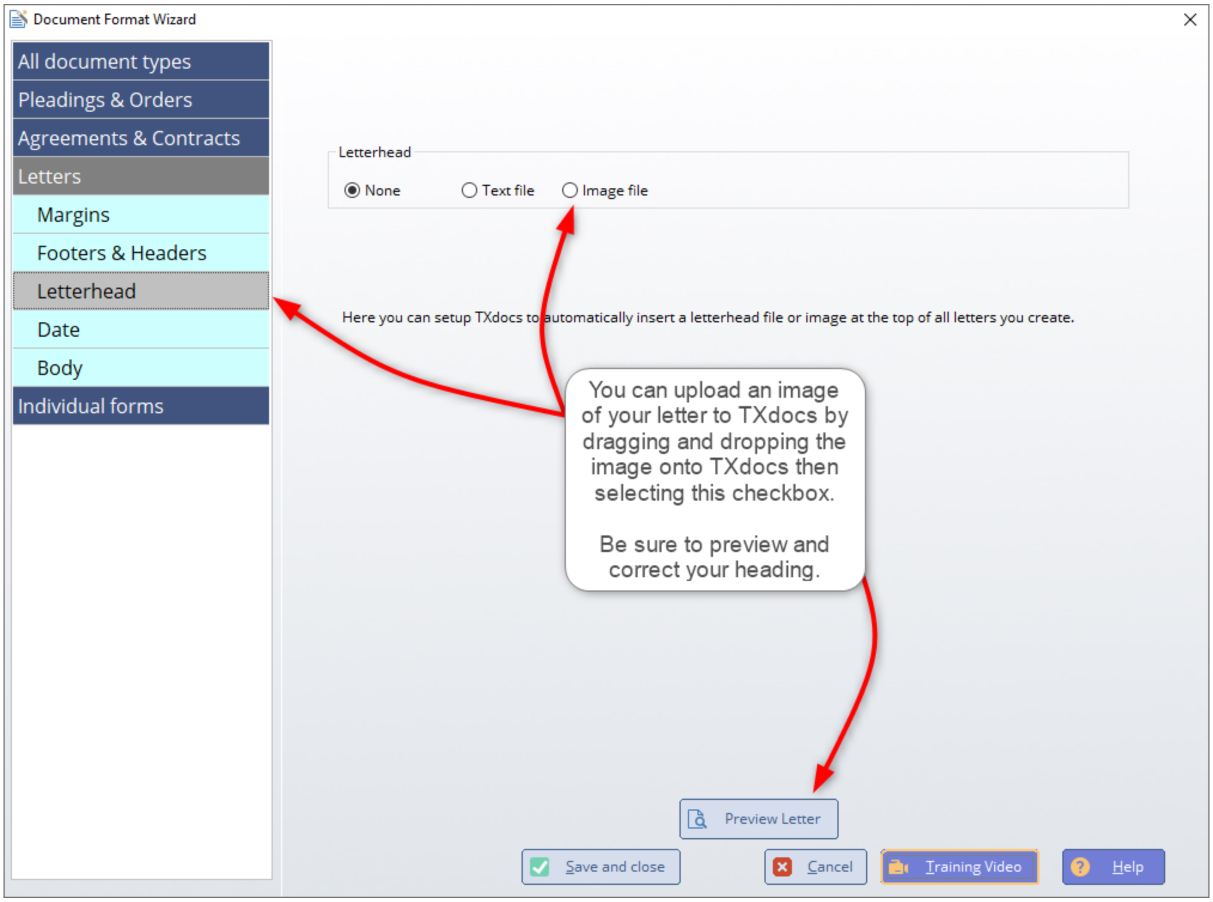

## Agreements & Contracts

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



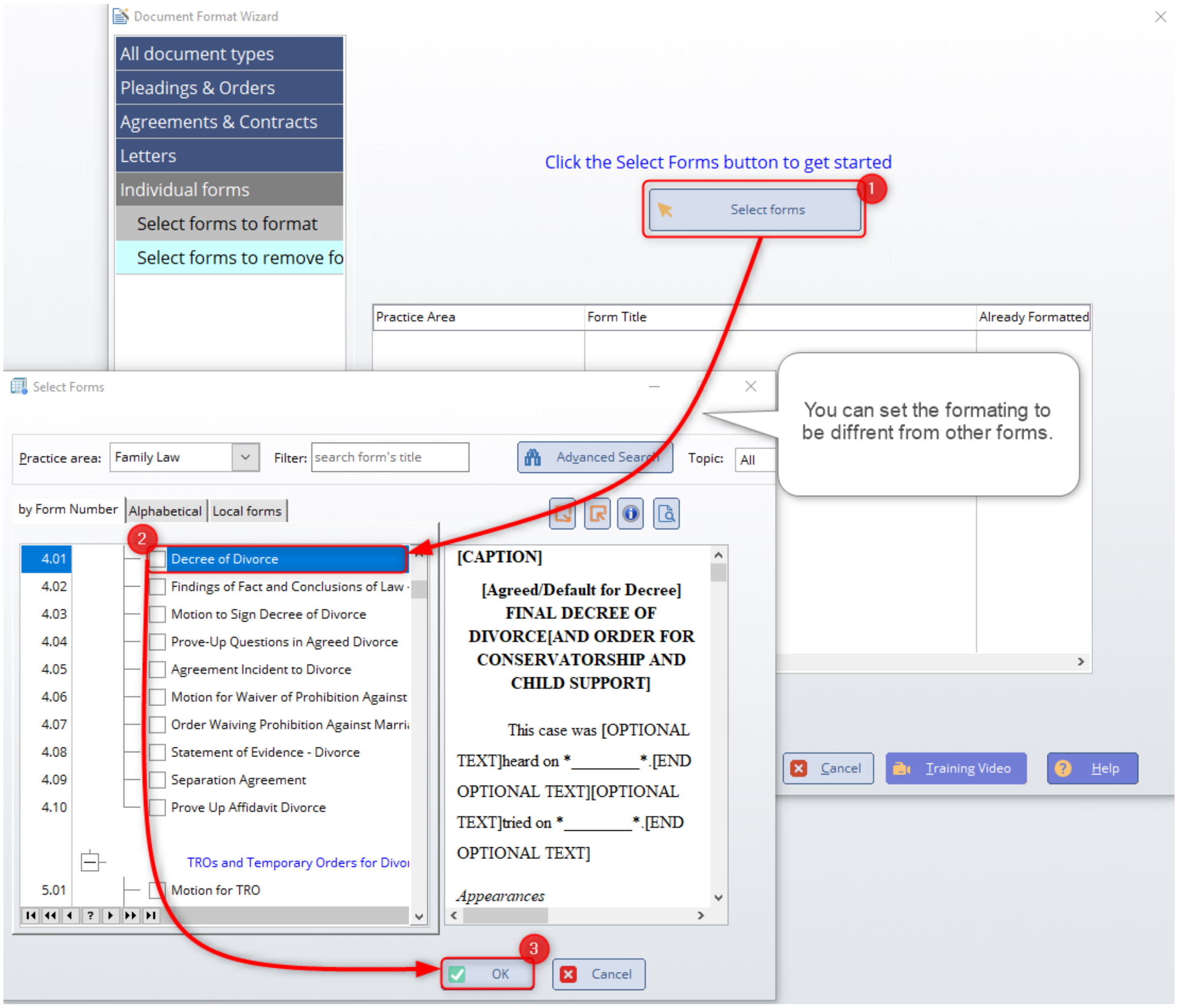

## Letters

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




Individual forms

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


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

# Practice Management

# 7 Practice Management

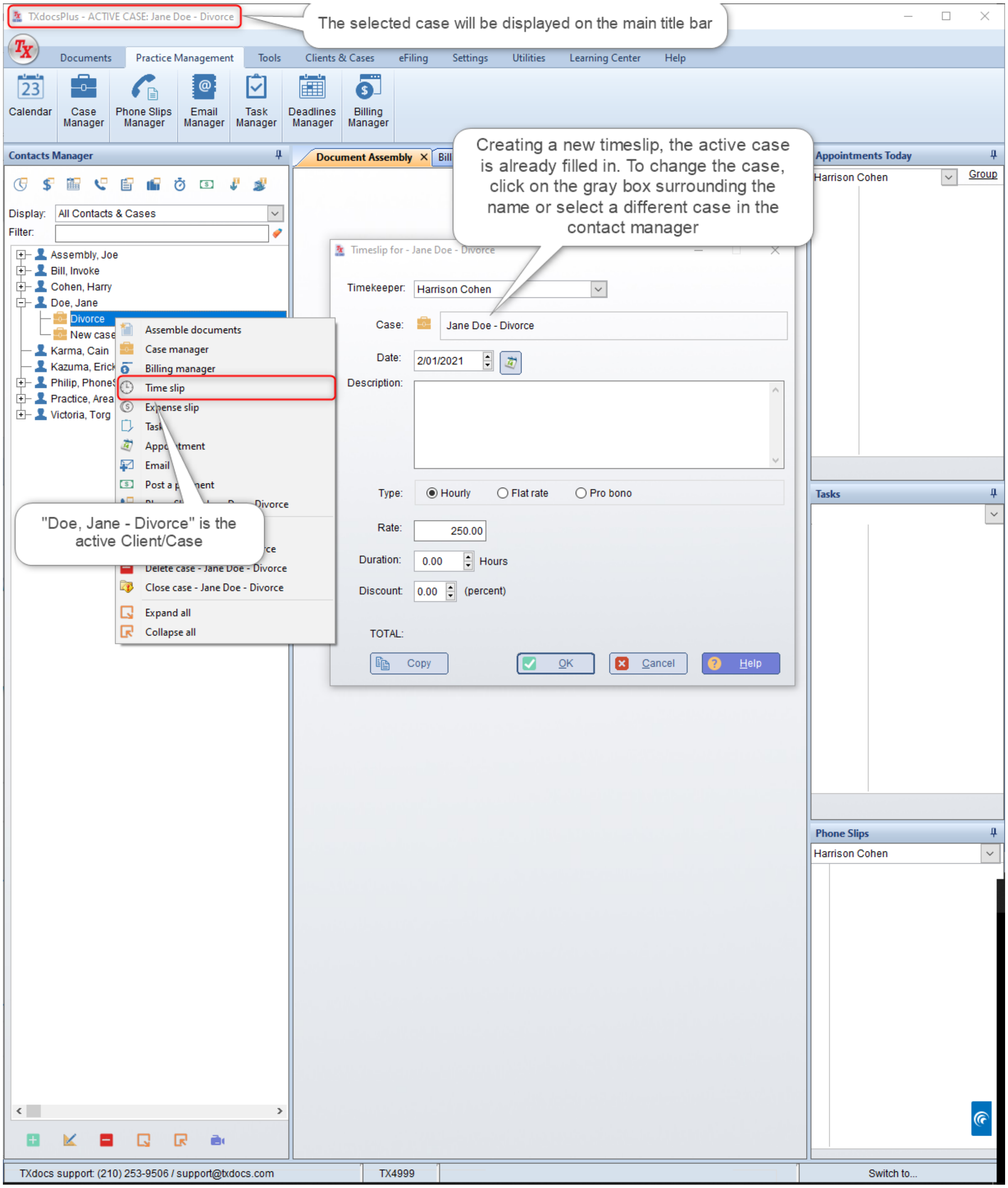
## 7.1 Billing Manager

TXdocs' billing manager is a complete billing system for handling deposits, expenditures and transfers from and between your operating account and your trust account.

You can generate billing statements for a single case or for all cases and you can generate reports to provide the status of individual cases or all cases in your firm.

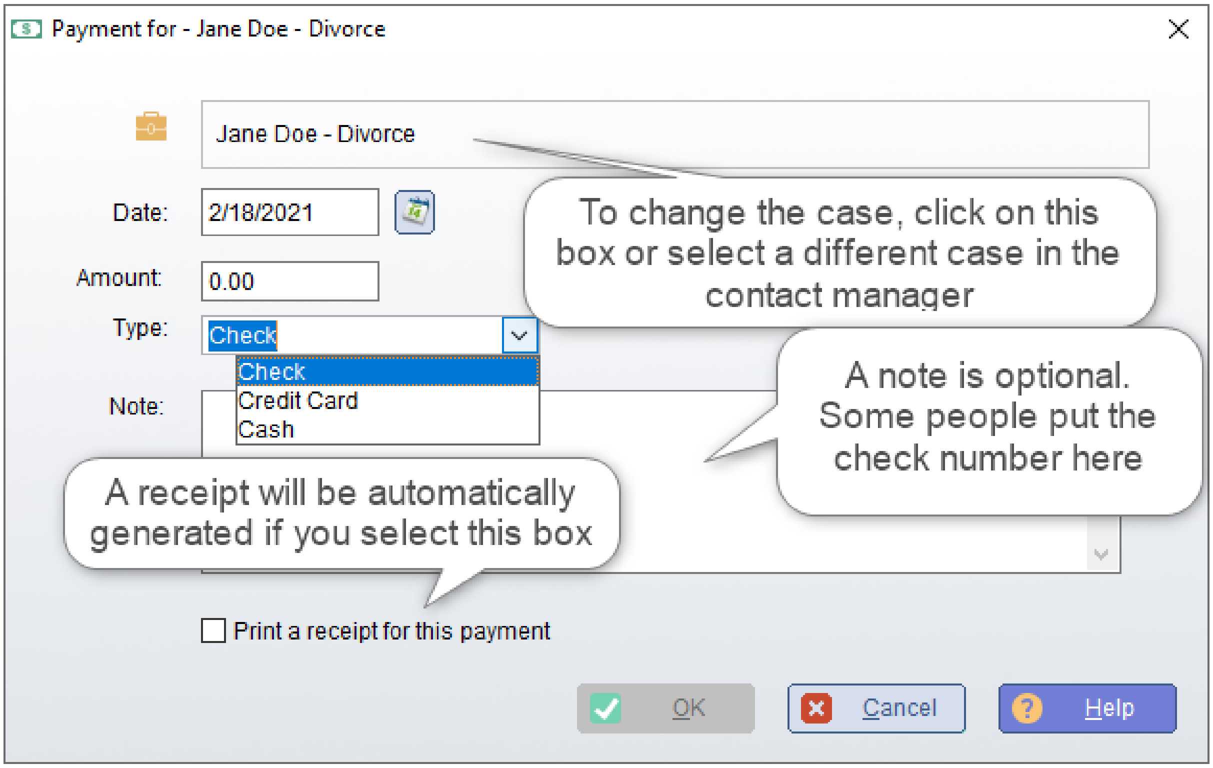
Keep in mind that TXdocs' Practice Management system uses the active client/case that is selected in the Contacts Manager on the left of your screen. So, if you do anything in the Billing System that relates to a specific client or case, for example receiving a payment from a client, the billing manager window will be preset to the active client and case. You will always be able to change the client/case.

You will also note that, if you do not have a Case selected in the Contacts Manager, then all Case specific items will be disabled in the Billing Manager

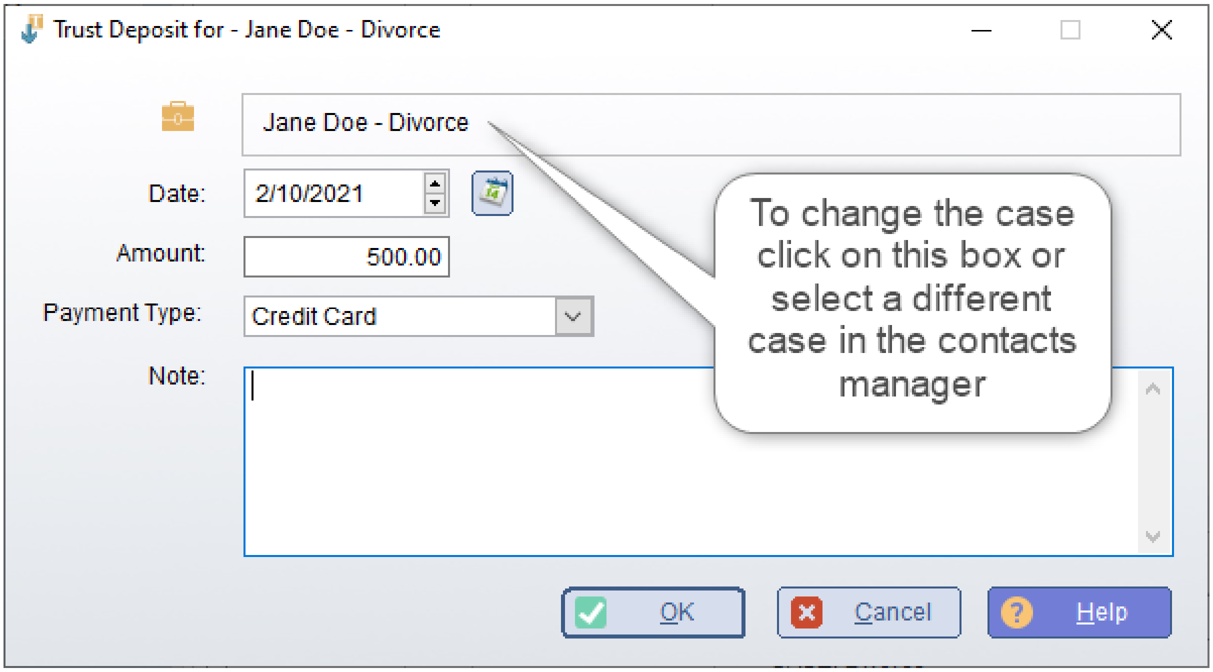

TXdocsPlus - ACTIVE CASE: Jane Doe - Divorce
The selected case will be displayed on the main title bar
Documents
Practice Management
Tools
Clients & Cases
eFiling
Settings
Utilities
Learning Center
Help
Calendar
Case Manager
Phone Slips Manager
Email Manager
Task Manager
Deadlines Manager
Billing Manager
Creating a new timeslip, the active case is already filled in. To change the case, click on the gray box surrounding the name or select a different case in the contact manager
Contacts Manager
Document Assembly
Appointments Today
Display: All Contacts & Cases
Filter:
Assembly, Joe
Bill, Invoke
Cohen, Harry
Doe, Jane
Divorce
New case
Karma, Cain
Kazuma, Erick
Philip, Phone
Practice, Area
Victoria, Torg
Assemble documents
Case manager
Billing manager
Time slip
Expense slip
Email
Delete case - Jane Doe - Divorce
Close case - Jane Doe - Divorce
Expand all
Collapse all
"Doe, Jane - Divorce" is the active Client/Case
Timeslip for - Jane Doe - Divorce
Timekeeper: Harrison Cohen
Case: Jane Doe - Divorce
Date: 2/01/2021
Description:
Type: Hourly Flat rate Pro bono
Rate: 250.00
Duration: 0.00 Hours
Discount: 0.00 (percent)
TOTAL:
Copy
OK
Cancel
Help
Harrison Cohen
Group
Tasks
Phone Slips
Harrison Cohen
TXdocs support: (210) 253-9506 / support@txdocs.com
TX4999
Switch to...

## CASE SPECIFIC ACTIONS

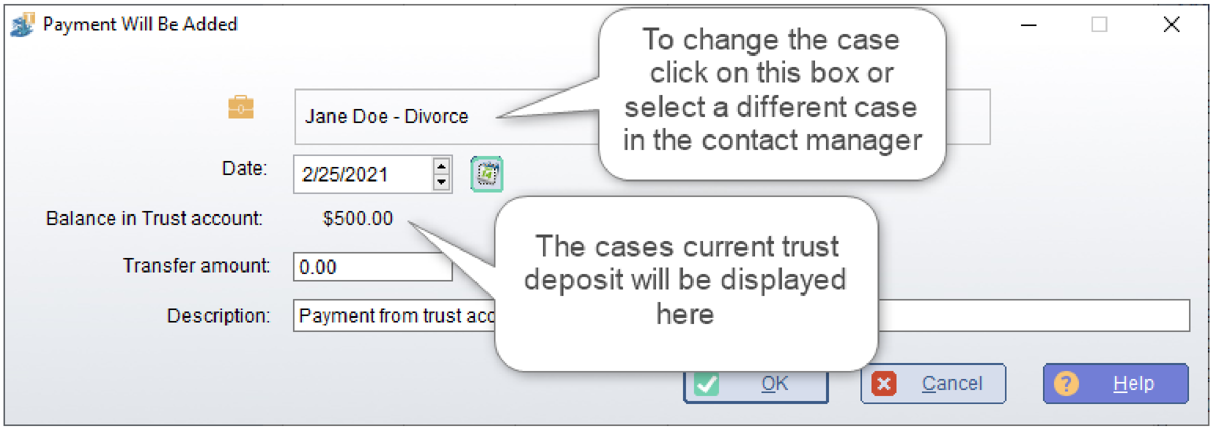
**Post a payment:** Click his button then fill in the form for the date, amount and type of payment.




**Post a Trust Account Deposit:** This button functions almost identically to the other payment button except this one will credit the payment into the active client's trust account balance.




**Transfer a Payment from Trust:** This button is used to transfer funds from the client's trust account for payment of amounts due by the client. The form will not let you transfer more than the client has available in the trust account.




**Generate a Statement:** Click this button to immediately generate a statement for the active case.

## Case Specific Reports

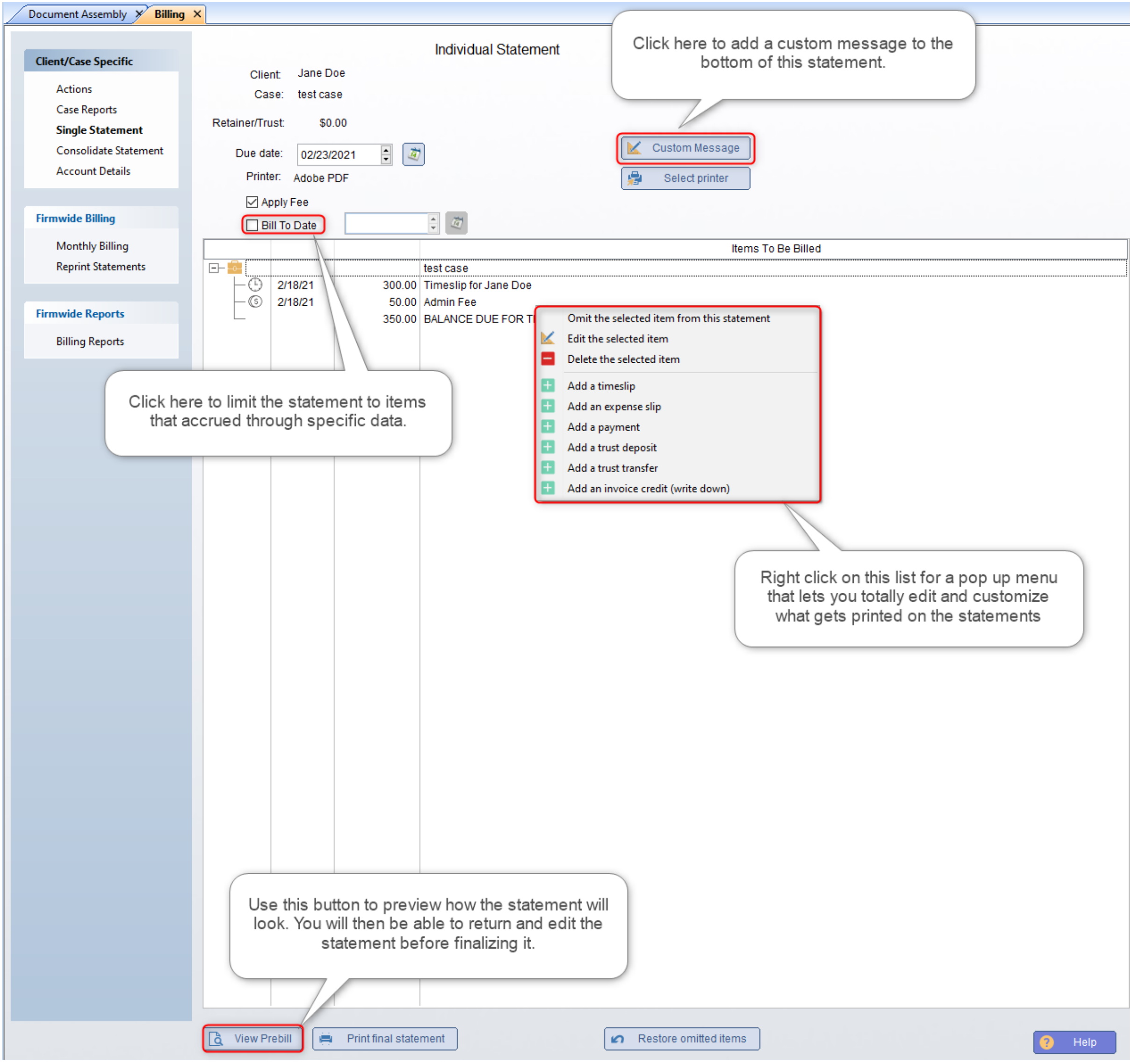
**Court Exhibit:** This option generates a report to use as an exhibit to prove up attorneys fees and costs for the active case.

**Case History:** This option generates a report showing all billing activities for the selected active case.

**Unbilled Items:** This option generates a report of all time slips and expense slips for the active case which have not been included on a statement.

## Statements

Single Statement and Consolidated Statements are very similar. The difference is that a single statement is for active case while a Consolidated Statement is a statement that bills for all cases for the active client. Obviously, if the active client only has one case, then the result is the same as if you had selected "Single Statement".




**Editing a Statement**: As you can see in the yellow highlighted text above, you can change the contents of the statement right from this screen. Just right click on an item in the list to see this menu:

**Omit the selected item from this statement:** If you selected an item in the list, this option will case that item to not be included in this statement. The item will, however, remain in the case and you will be able to to include it on any subsequent statements.

**Edit / Delete the selected item:** These options will permanently change or delete the selected item from the case.

**Add Timeslip, Expense slip, Payment, Trust deposit**: These options will let you add any of these items which you may have forgotten to enter before.

****NOTE**:** If you want to refund someones trust you can add a negative Trust deposit, i.e. $-1,000.

**Add a trust transfer:** If the case has funds in trust, you can use this option to apply those funds to this statement.

**Add an invoice credit (write down):** Select this option to make an adjustment to the amount due on this statement.

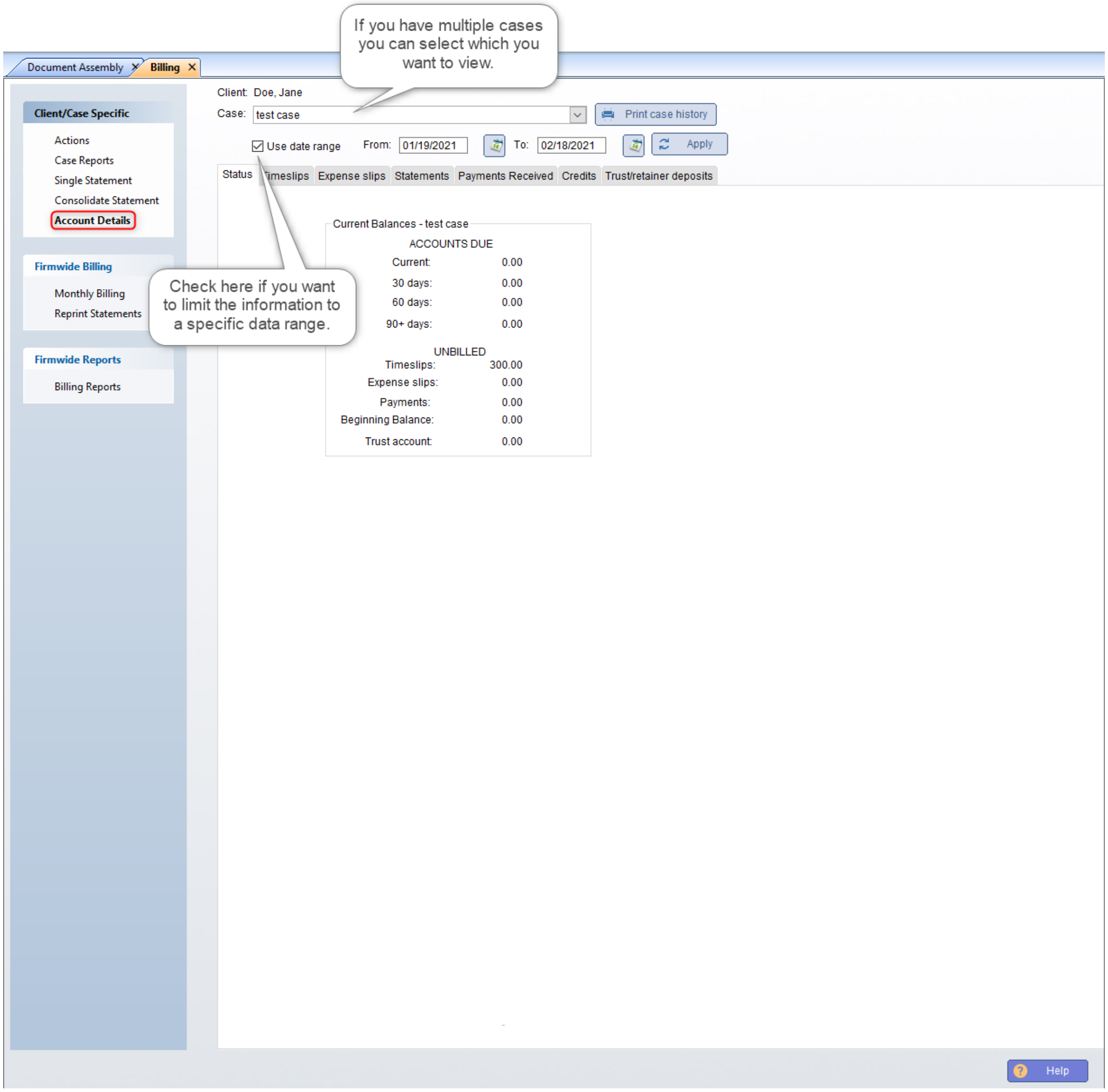
## Account Details

This option gives you a single location to see all billing details for your cases. The information is organized and presented on 7 tabs. Simply click a tab to view the associated information.

**Case:** If the active client has multiple cases, this drop list will include all of those cases. Click the down arrow to see and select the case you want.

**Use date range:** If you want to limit the data to only those items that fall within a specific date range, check this box. You can then enter the From and To dates. You must click the Apply button to apply the date range.

**Undoing Bills:** If there was an issue with a bill please see the section on how to undo a bill .




## Monthly Billing

The other options for billing give you the ability to generate a statement for a specific client or case.  The monthly billing feature lets you generate a batch of statements all at once.  The most common way to use this feature is to generate statements for your clients at the beginning of each month covering all charges that accrued to their account in the previous month.

**Due date:**  The is the due date that will be printed on the statements.

**Bill To Date:** Check this box if you want to only bill for items that accrued through a specific date. For example, if you are billing on September 4, you can choose to only bill for items that accrued through then end of last month (August 31).

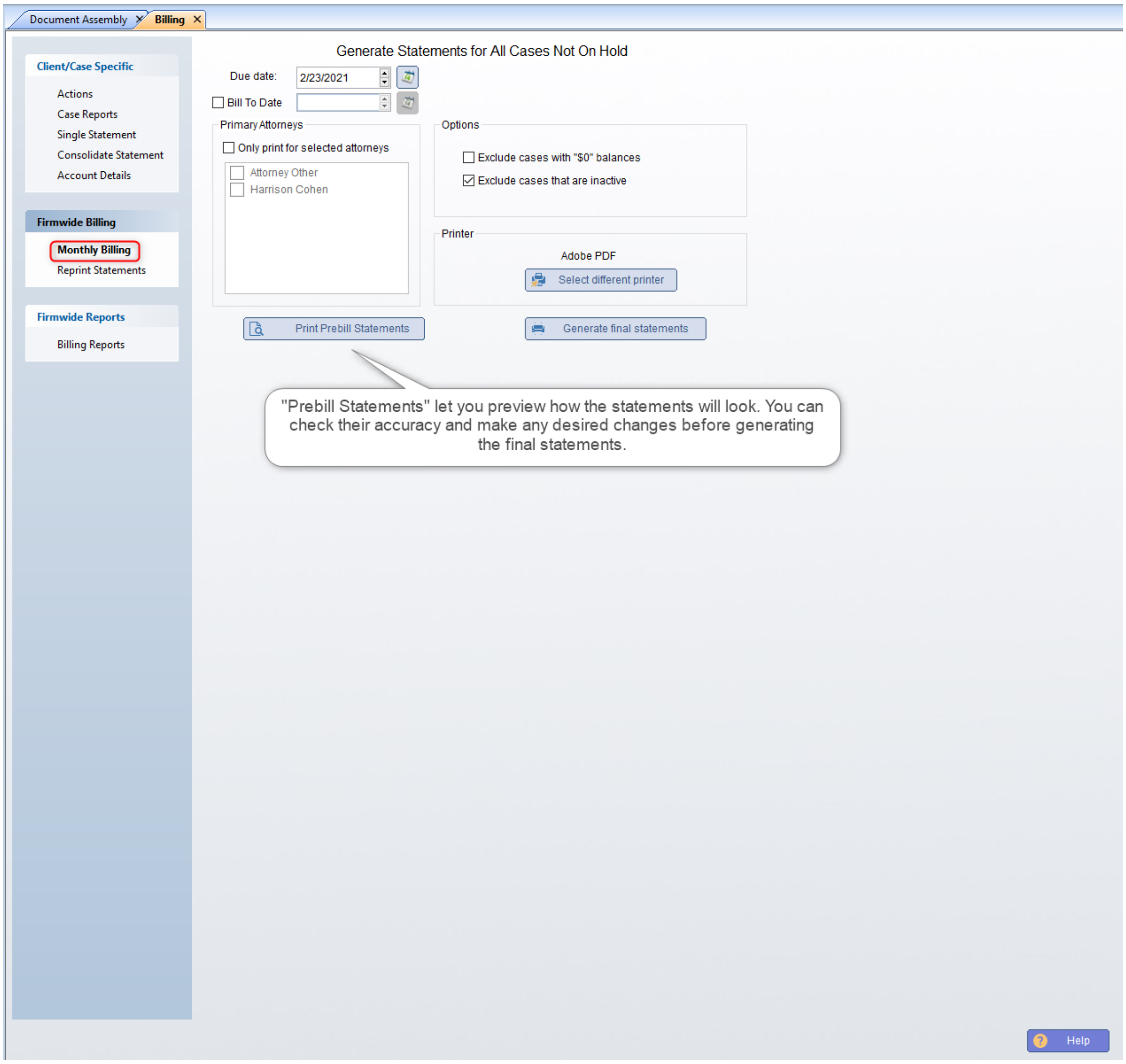
**Primary Attorneys:** This includes a list of all attorneys in your firm. You can select to limit the monthly billing to just one or more of the attorneys.

**Exclude cases with "$0 balances:** Check this box to not include any cases where nothing is due. For example, there could be charges and payments during the period but, if the net result is $0 due, the case would be excluded.

**Exclude cases that are inactive:** An inactive case is a case in which there was no activity in the billing system - that is, there were no charges and no payments during the billing period AND there is no previous balance still due.

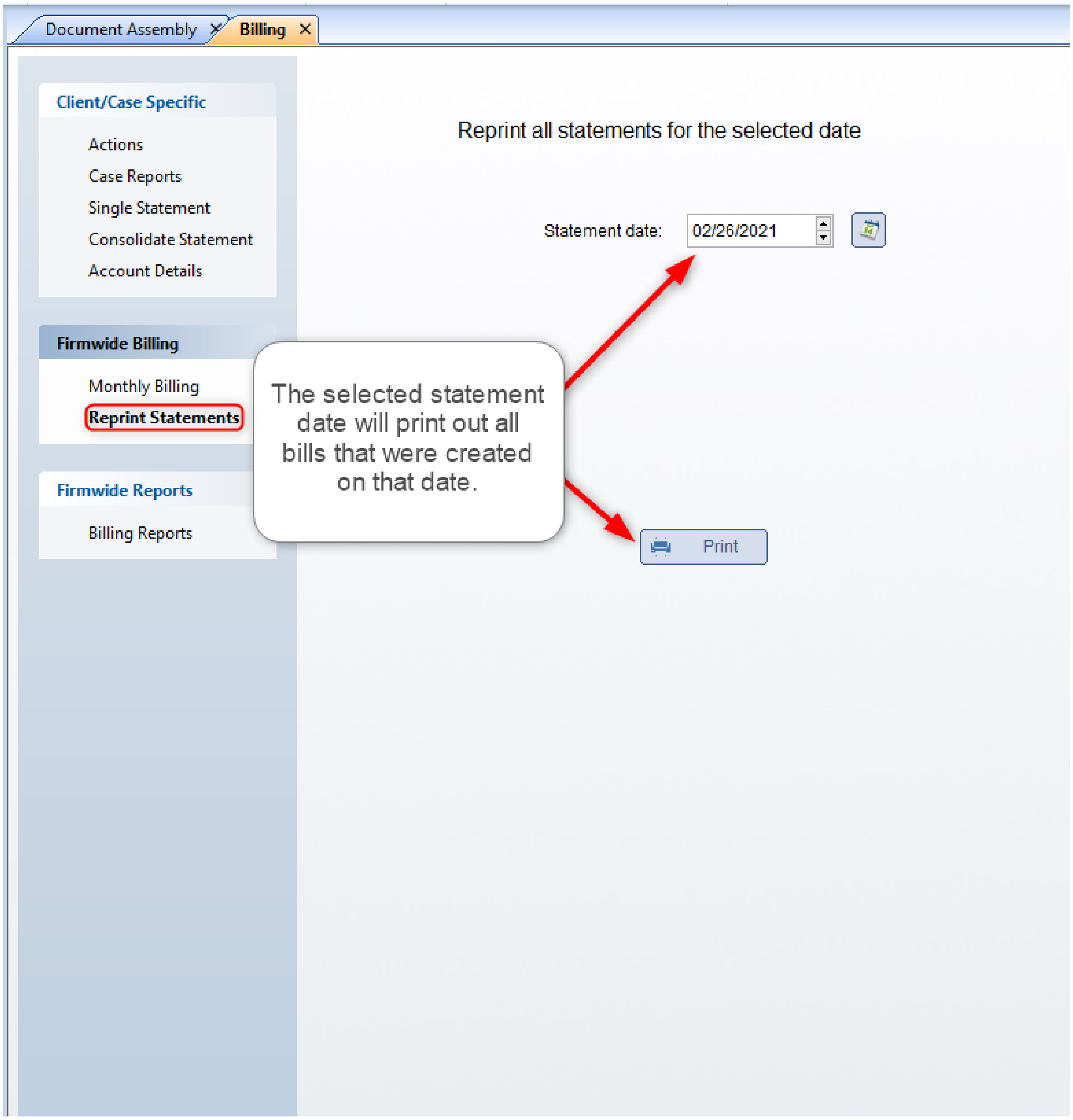
**Print Prebill Statements:** Prebill statements let you preview what will be billed to the client. You can review the prebills and then come back into TXdocs and adjust the statements before final printing. REMEMBER - printing prebills does not actually bill the client and it does not post the amounts to the case. You must Generate final statements to post all entries and keep the system up to date.

**Generate final statements:** This generate the statements and post all amounts to the case. If a case is set to "Email statements", then the statement will be emailed. Otherwise, it will be printed.




## Reprint Statements

Occasionally you may run monthly statements and something went wrong with the printer and the statements did not print properly.  On this tab you can reprint all of the statements for a particular date.




## Billing Reports

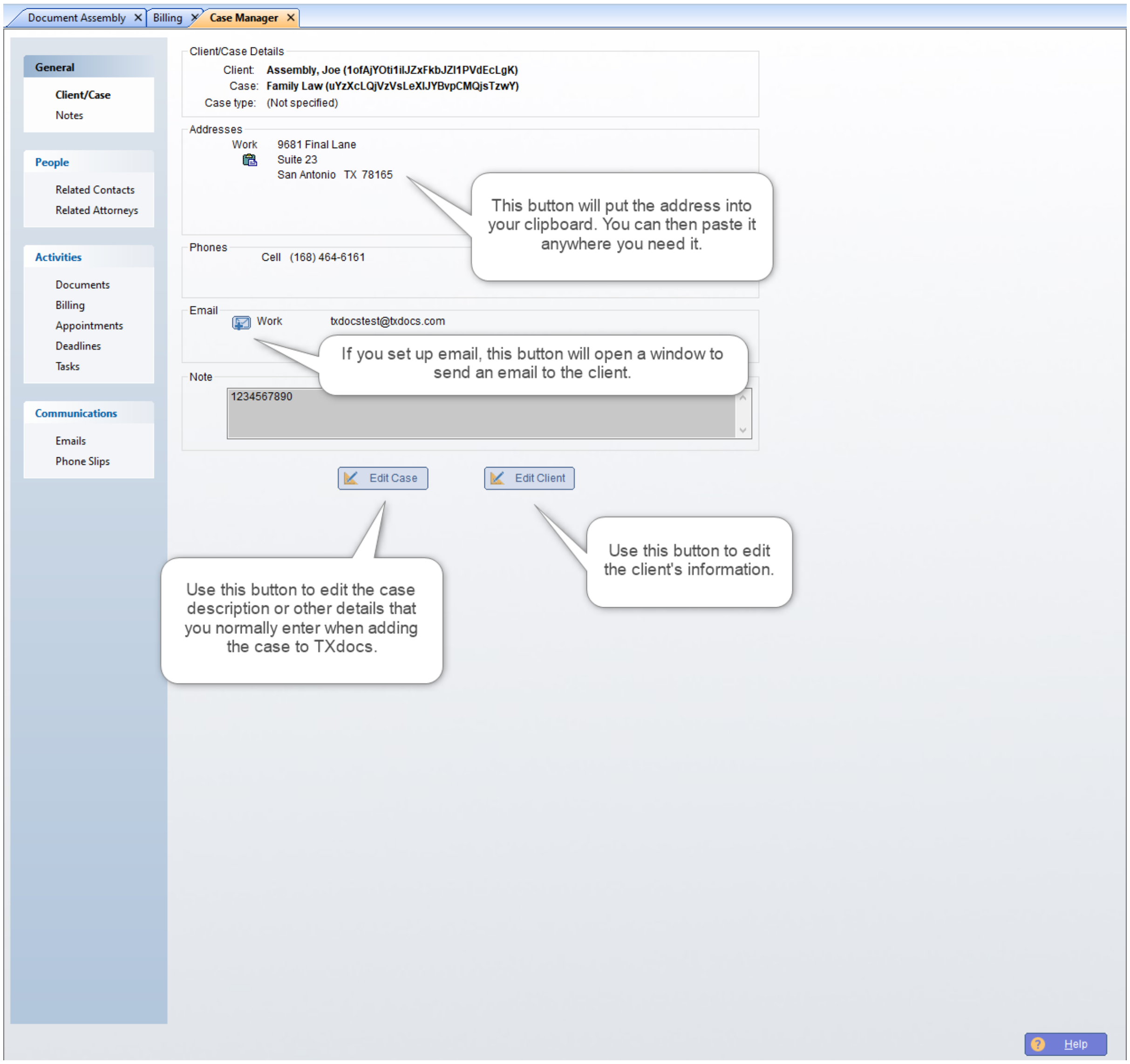
The best way to learn what each of these reports provides is to click on each button. A preview window will open showing you what the report looks like and what data will be included.

## 7.2 CaseManager

TXdocs' Case Manager is designed to give you just about every conceivable bit of information about a case in a single location.

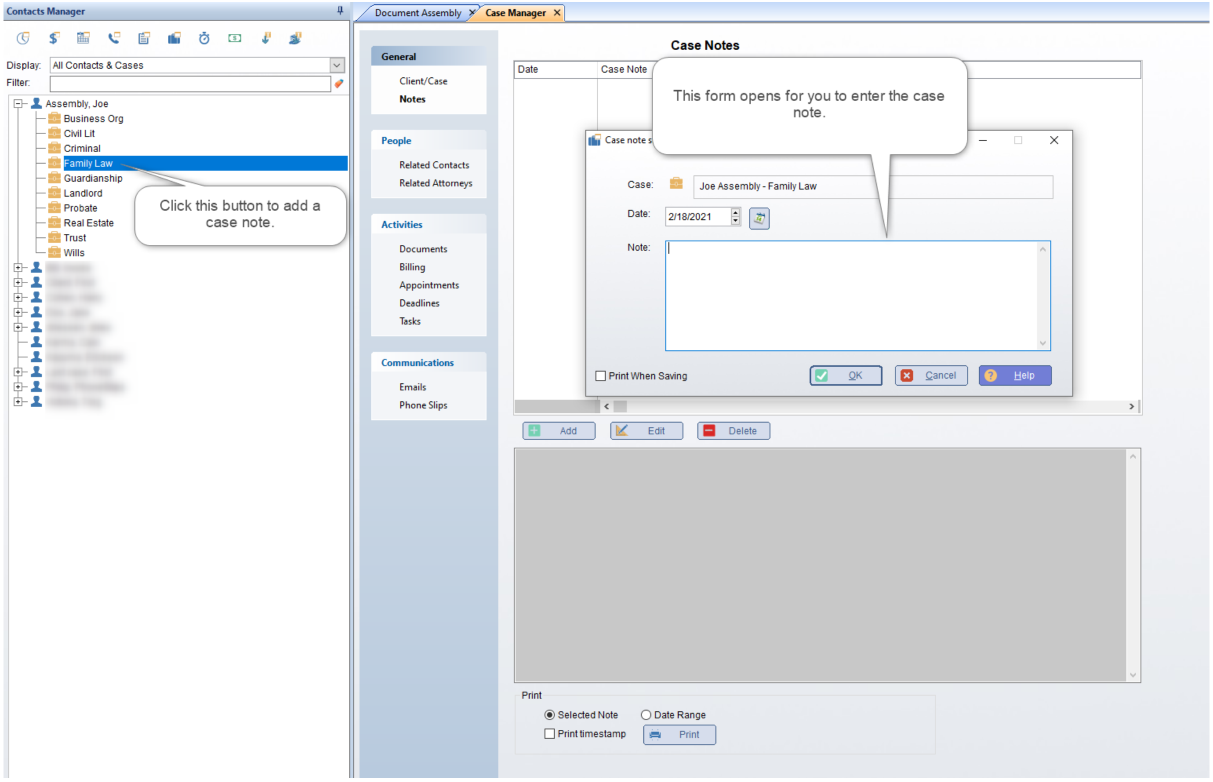
## Client/Case

This tab provides contact information for your client.




## Notes

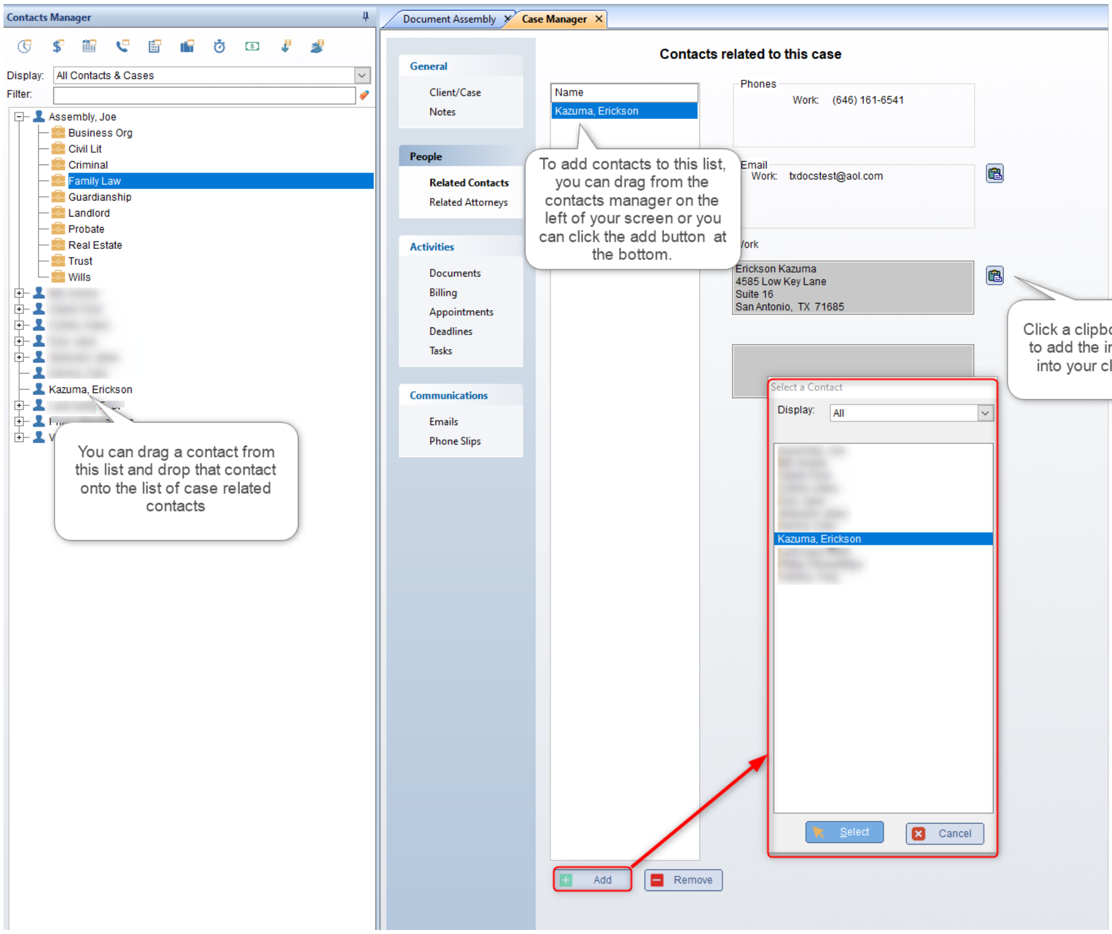
You can keep notes about a case. For example, some attorneys like to add notes to the case file whenever they have a phone conversation with the client of the opposing attorney. On the Notes tab you will find a chronological listing of all notes you have made for this case.




## Related Contacts

You can keep track of the people you are dealing with in a case on the Related Contacts tab. (there is a separate tab for attorneys in the case). First, you will want to make sure you have added those people into the Contacts Manager. One really big advantage to adding all contacts into your Contacts Manager is that years later, the Conflict Checker will be able to tell you that you have dealt with that person before. Additionally, by associating that person with a case, the conflict checker will be able to tell you which case or cases that person was involved in . Another advantage is that you don't have to try to remember which investigator or the name of some witness involved in this case - all that information will be right here. Additionally, when you highlight the person you will see their phone numbers and addresses.

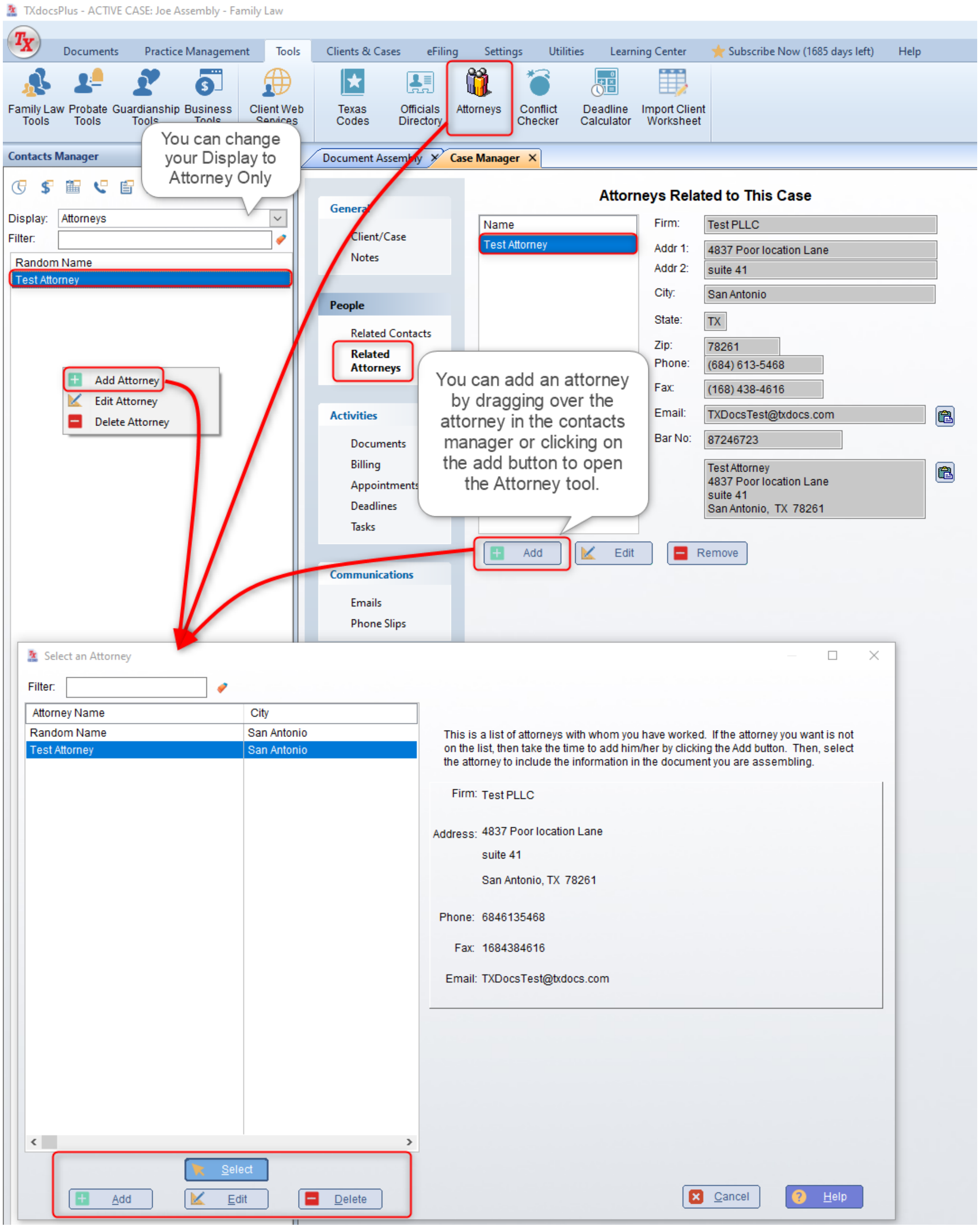
NOTE: One great time saving shortcut is to simply drag the contact's name from the Contacts Manager and drop it on the Related Contacts list.




## Related Attorneys

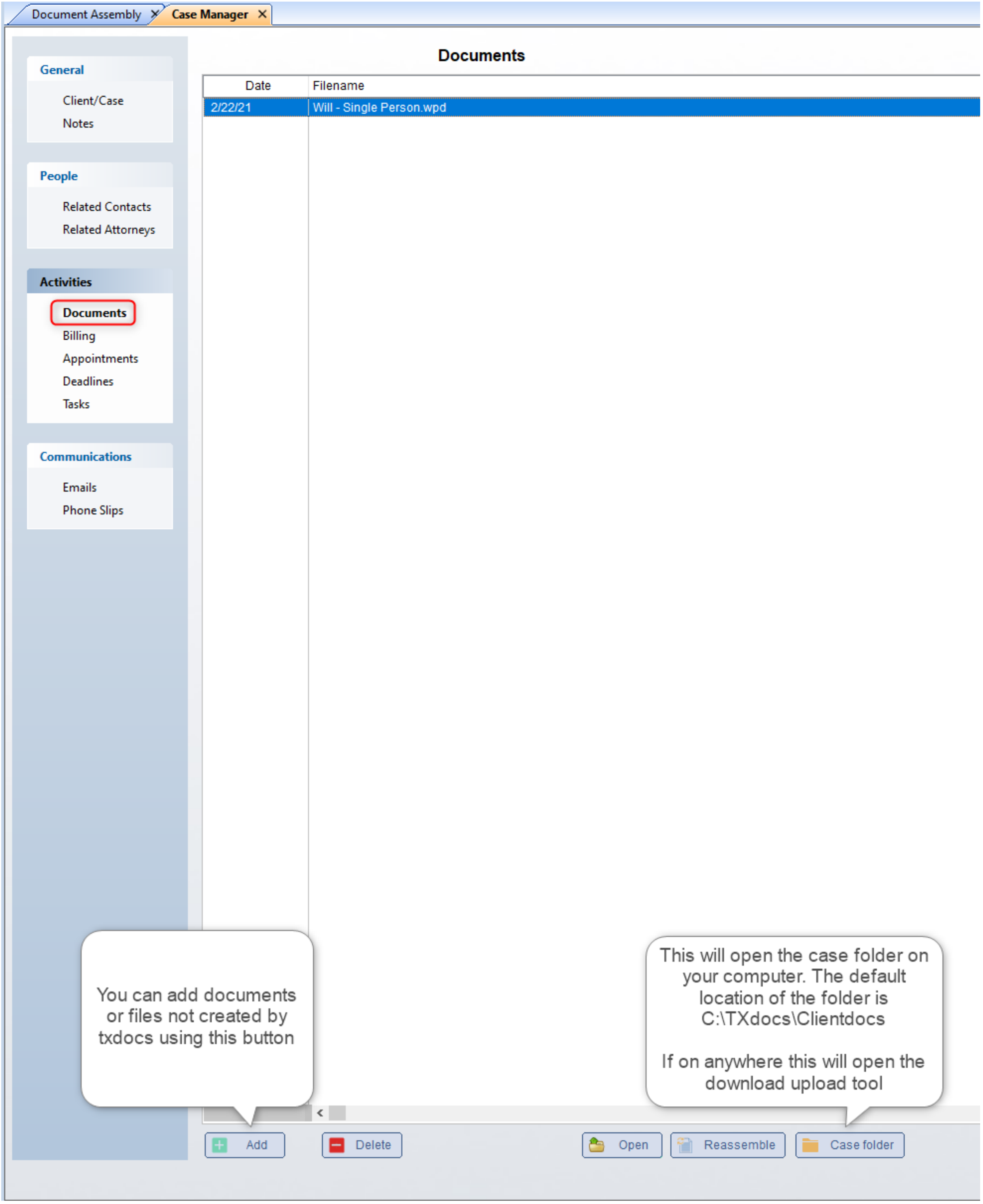
The Related Attorneys feature is very similar to the Related Contacts feature described above. You can keep track of the other attorneys involved in a case. First, you will want to make sure you have added those attorneys into the Contacts Manager. One really big advantage to adding all contacts into your Contacts Manager is that years later, the Conflict Checker will be able to tell you that you have dealt with that person before. Additionally, by associating that person with a case, the conflict checker will be able to tell you which case or cases that person was involved in . Another advantage is that you don't have to try to remember which investigator or the name of some witness involved in this case - all that information will be right here. Additionally, when you highlight the person you will see their phone numbers and addresses.

NOTE: One great time saving shortcut is to simply drag the contact's name from the Contacts Manager and drop it on the Related Contacts list.



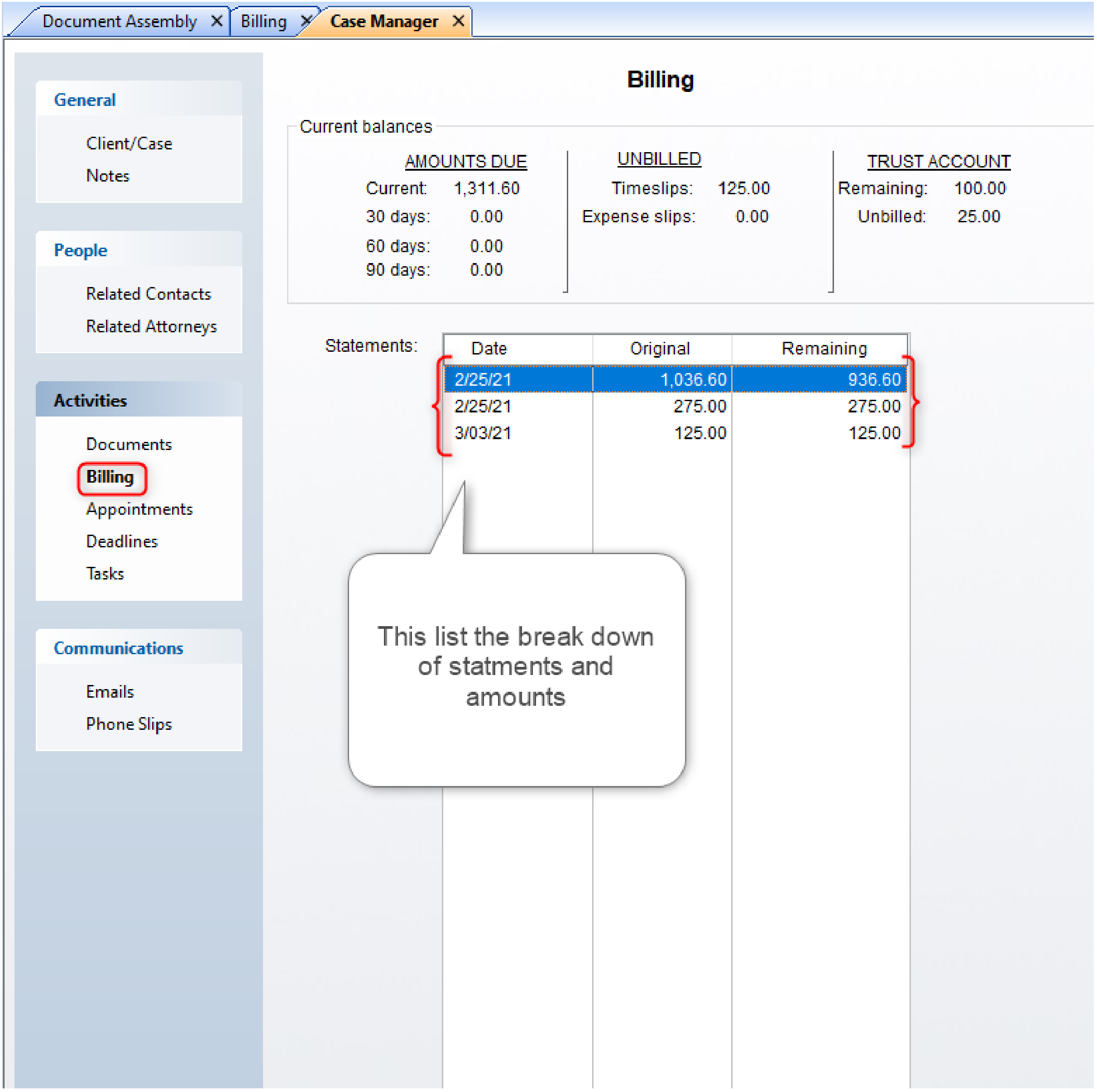
## Documents

The documents tab provides a list of all documents you have assembled for the case in TXdocs. You can add documents that were not assembled in TXdocs to the list by using the **Add** + that is at the bottom of the documents list.



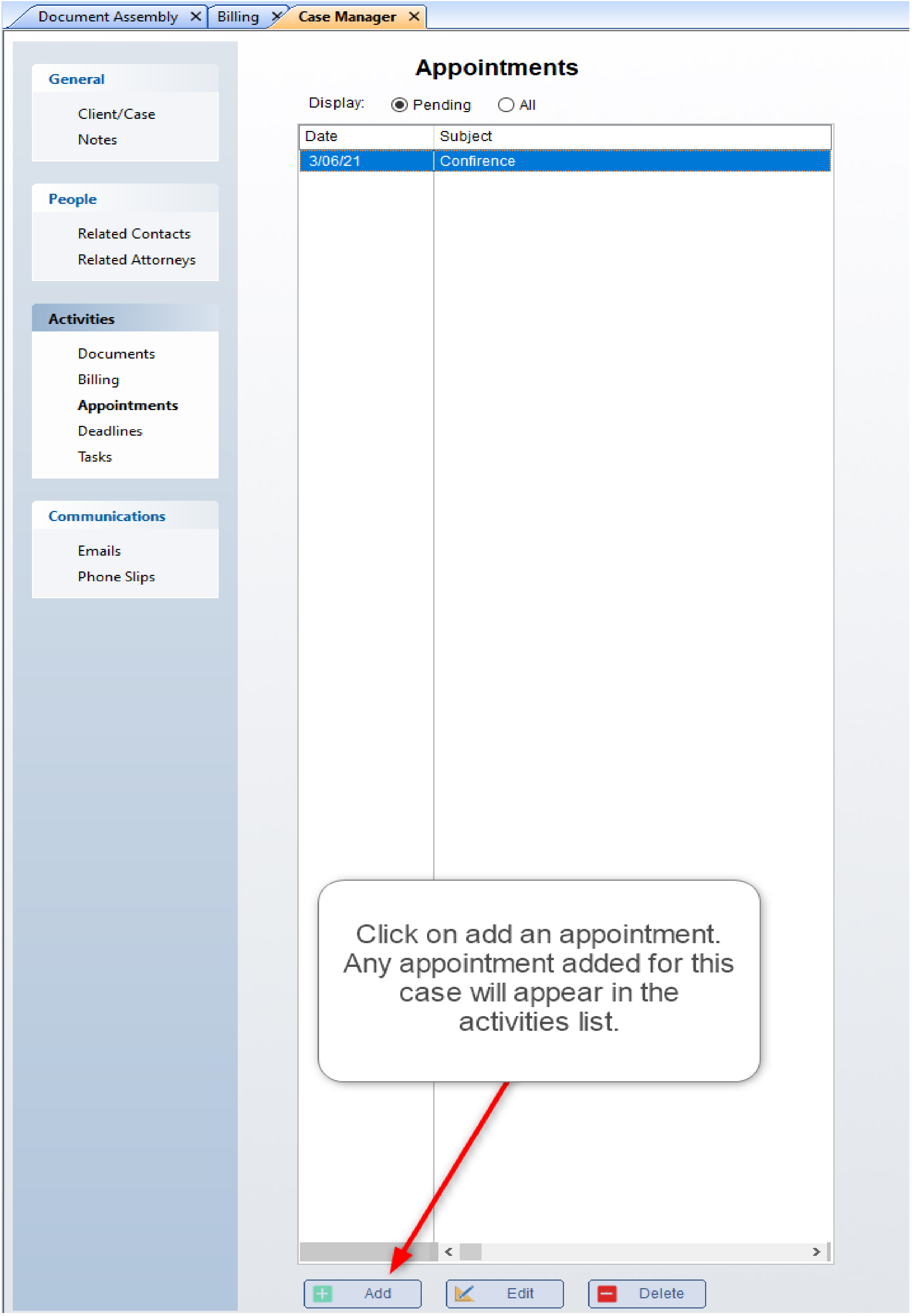

## Billing

This tab provides a snapshot of the billing status of the selected case. Note the **View/Print** button at the bottom of the list of statements. You can select a statement and then use this button to reprint it.

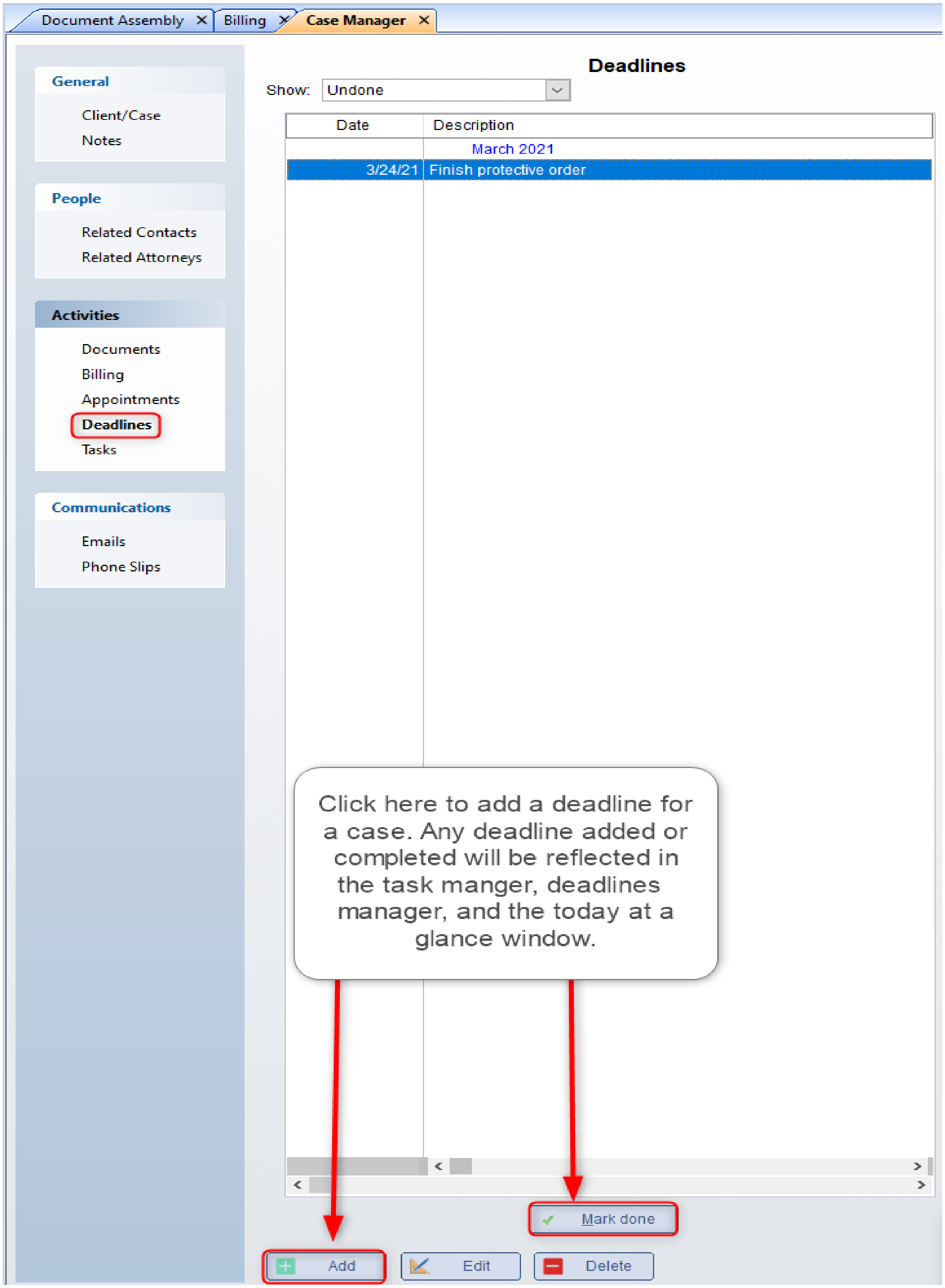



## Appointments

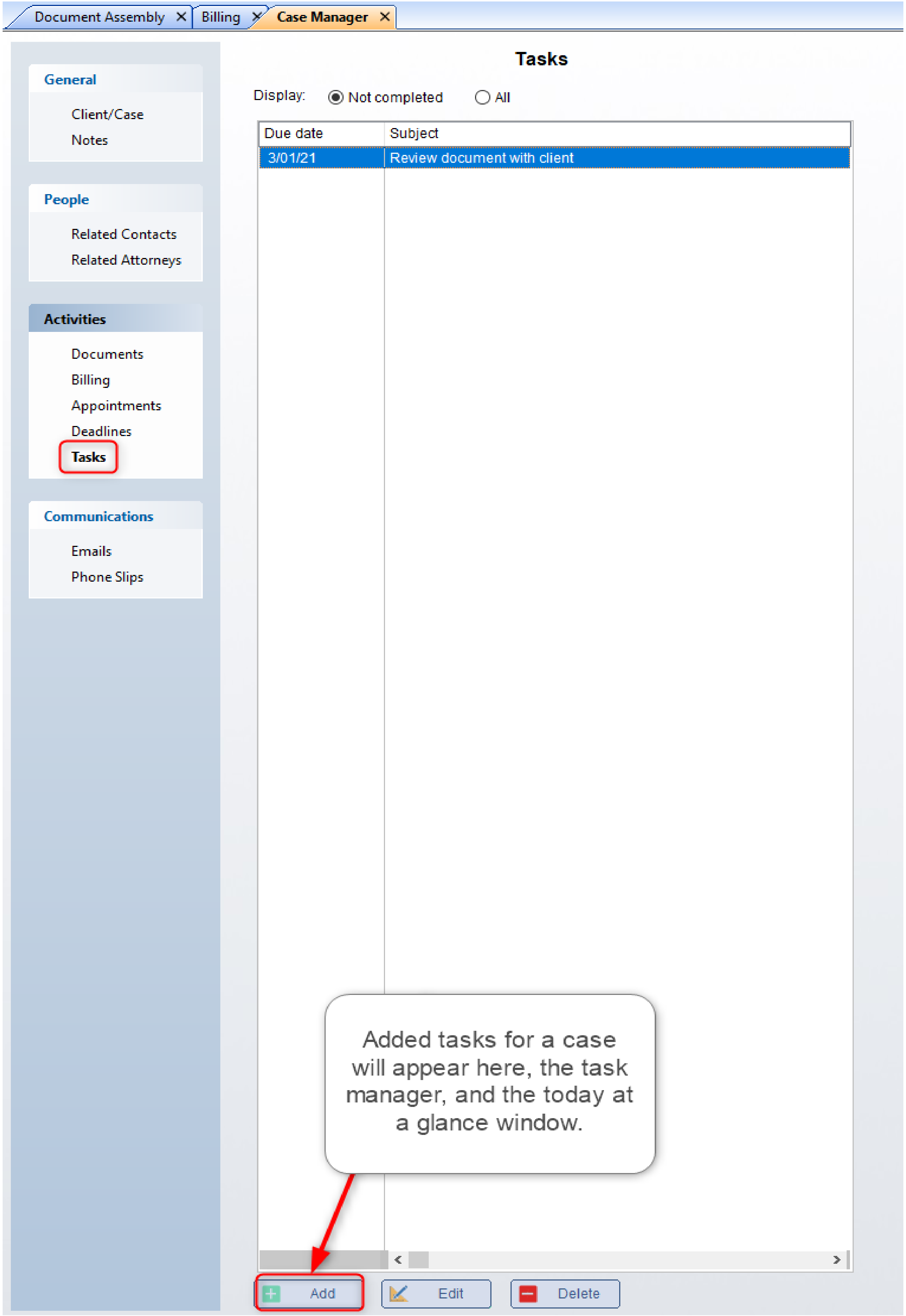
The appointments tab shows every calendar appointment that is related to this case. For an appointment to show up here, however, you must have selected this case at the time you created the appointment. Note that you can Add, Edit and Delete appointments for this case right here instead of having to go to the calendar and find it.


Document Assembly
Billing
Case Manager
General
Client/Case
Notes
People
Related Contacts
Related Attorneys
Activities
Documents
Billing
Appointments
Deadlines
Tasks
Communications
Emails
Phone Slips
Appointments
Display: Pending All
Date
Subject
3/06/21
Confirence
Click on add an appointment. Any appointment added for this case will appear in the activities list.
Add
Edit
Delete

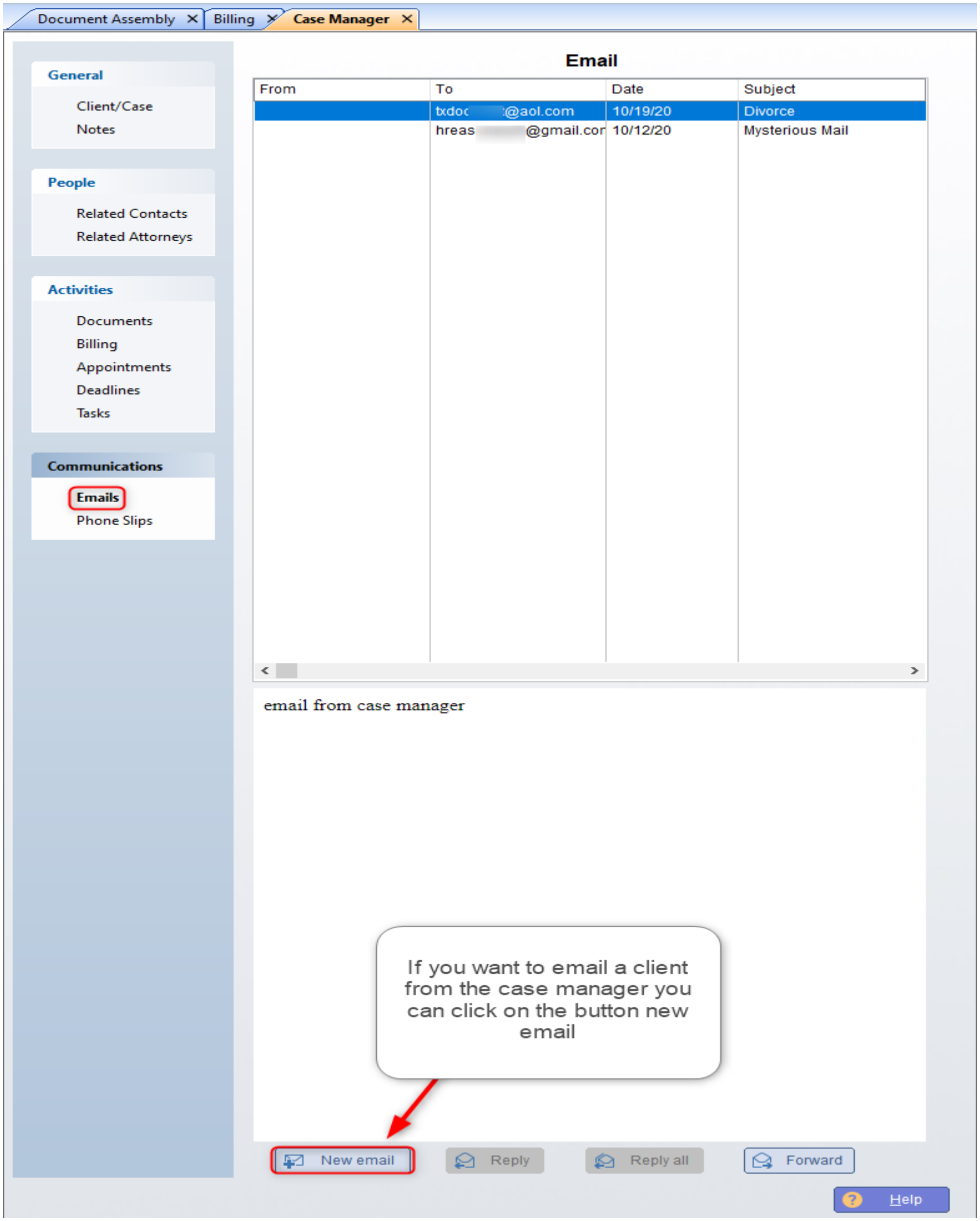


Document Assembly
Billing
Case Manager
General
Client/Case
Notes
People
Related Contacts
Related Attorneys
Activities
Documents
Billing
Appointments
Deadlines
Tasks
Communications
Emails
Phone Slips
Deadlines
Show: Undone
Date
Description
March 2021
3/24/21
Finish protective order
Click here to add a deadline for a case. Any deadline added or completed will be reflected in the task manger, deadlines manager, and the today at a glance window.
Mark done
Add
Edit
Delete


Document Assembly
Billing
Case Manager
General
Client/Case
Notes
People
Related Contacts
Related Attorneys
Activities
Documents
Billing
Appointments
Deadlines
Tasks
Communications
Emails
Phone Slips
Tasks
Display:
Not completed
All
Due date
Subject
3/01/21
Review document with client
Added tasks for a case will appear here, the task manager, and the today at a glance window.
Add
Edit
Delete

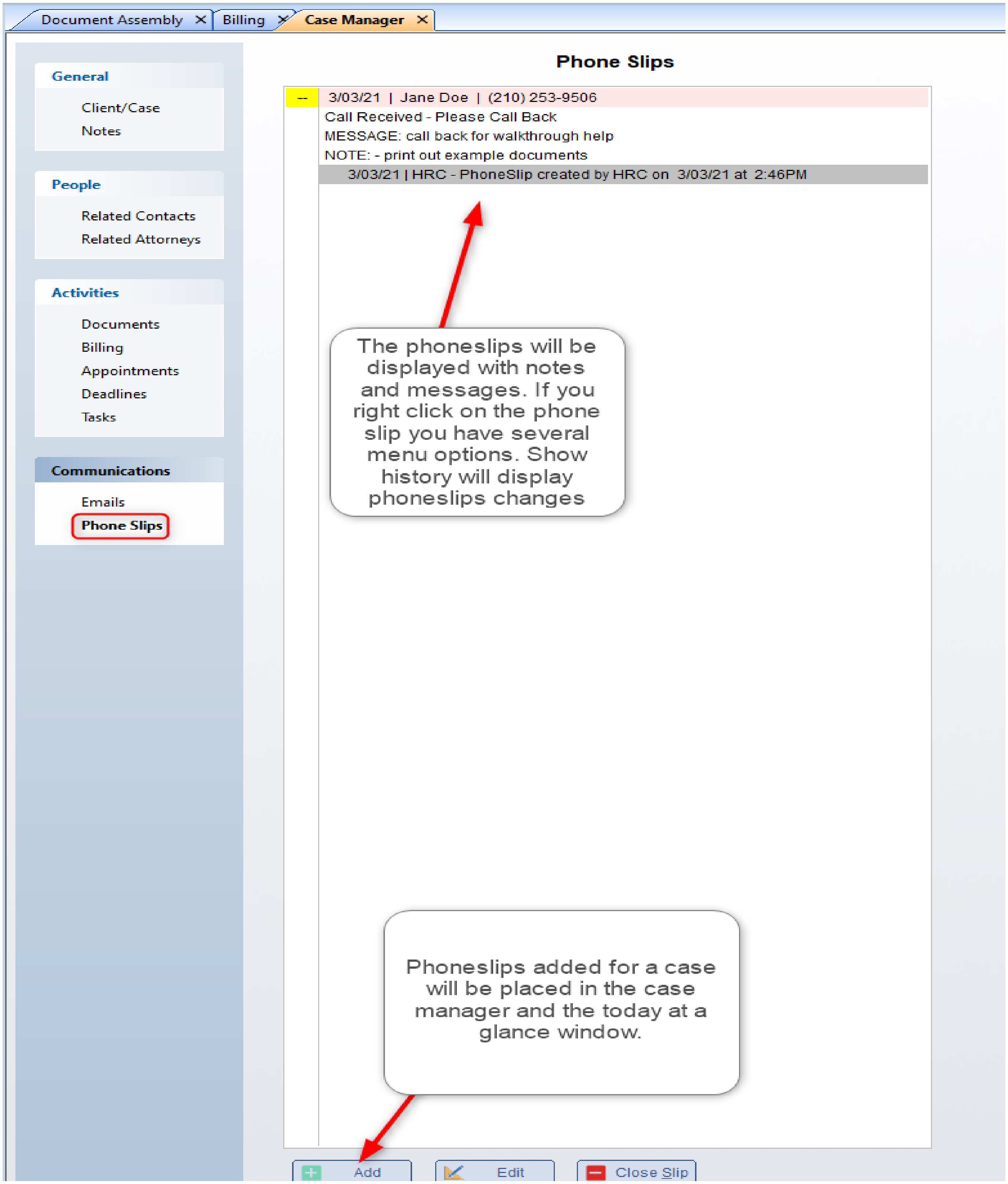
## Emails

The emails tab shows all emails that you sent from within TXdocs and in which you selected this case. Additionally, if you are using Email Manager, this tab shows all emails you dragged from your Outlook folders and dropped on this case.



## Phone Slips

Each of these tabs show the appropriate items that have been related to this case.



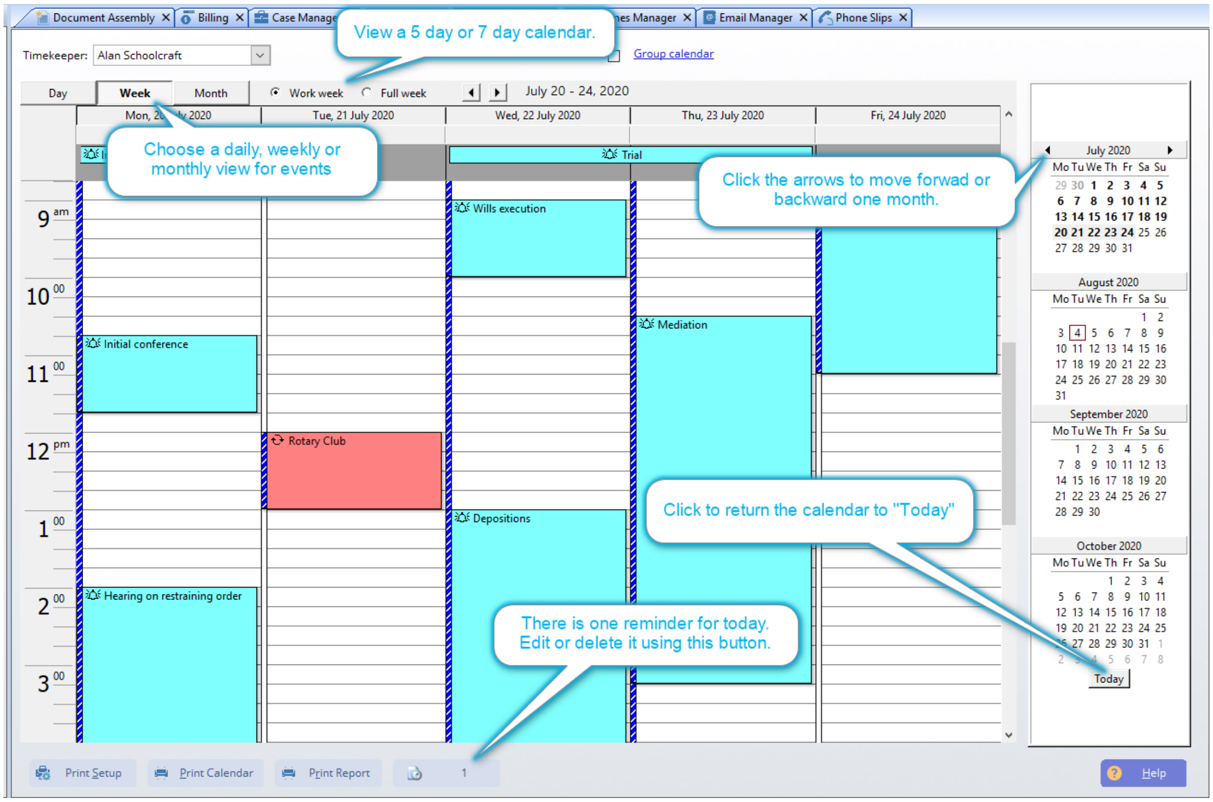
## 7.3 Calendar

**Adding events to the calendar:** There are 3 ways to add an event directly into the calenar: (1) double-click on any time slot on the calendar; (2) right-click on the calendar and select **Add event** from the pop up menu; or (3) drag a contact from the Contacts Manager and drop it onto a time slot.

**Editing events:** There are three ways to edit the details about an event: (1) double-click on the event; (2) right-click n the event; or (3) drag the event to a different time or date on the calendar or drag the top or bottom edge of the event on the calendar to change the length of time for the event.

**Timekeeper:** you can view the calendar for any time keeper in your firm. Simply select the timekeeper from this drop list.

**Group calendar:** This feature is particularly useful when trying to plan an event that includes multiple timekeepers. Click on the Group calendar link and then select all of the timekeepers involved. This will display all of their calendars on the screen at the same time, thus allowing you to see time periods when they are all available.




## 7.4 Email Manager

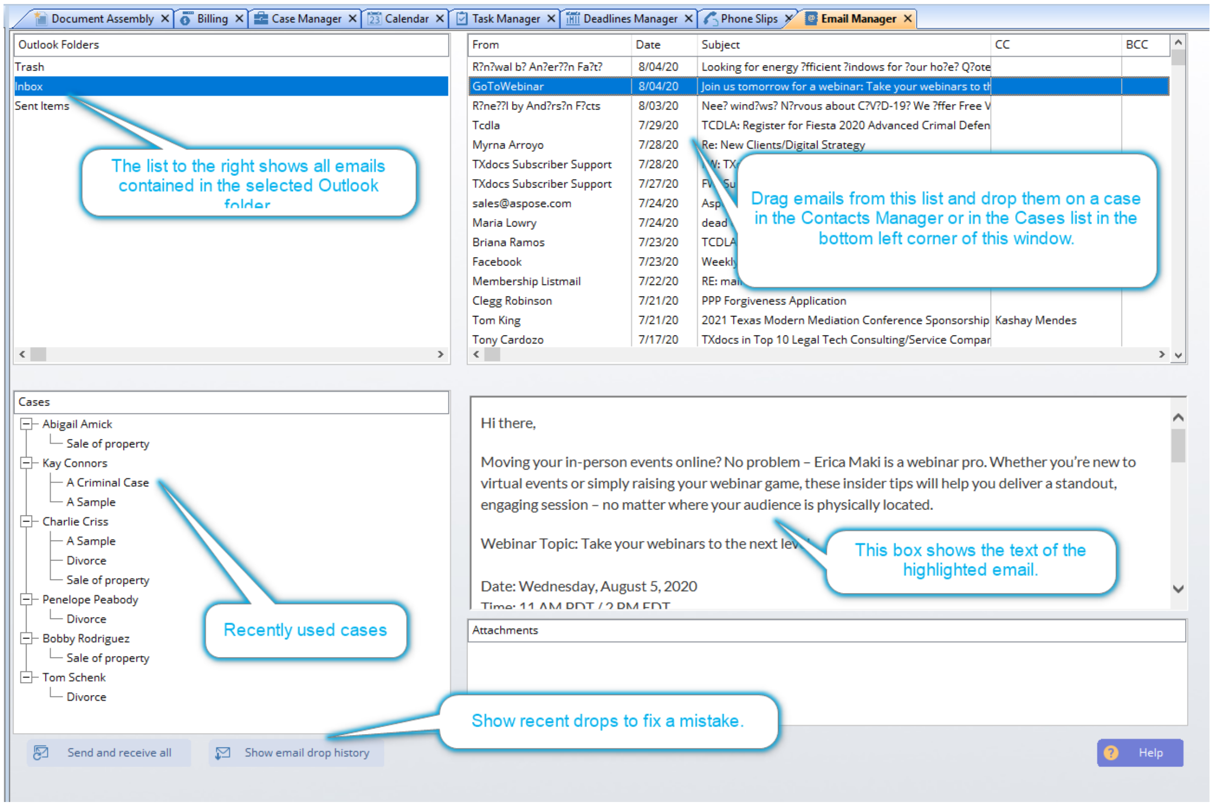
TXdocs' Email Manager manages the email integration between TXdocs and Microsoft Outlook.  The manager displays emails that are in Outlook's folders and it gives you the ability to drag a copy of those emails and drop them into a case.  All emails that are dropped into a case are then visible in Case Manager under the Emails tab.

This feature is only available to you if you use Microsoft Outlook for your email and if you enabled TXdocs' integration with Outlook in Personal Settings.

**Outlook Folders:** This list shows all Outlook folders that you told TXdocs to manage when you enable Outlook integration in Personal Settings.  When you select a folder in this list, then all of the emails in that folder will be displayed in the list to the right.

**Copying an email to a case:** The whole purpose of the Email Manager is to enable you to copy all emails that relate to a particular case into the Case Manager for that case.  That way, all email relating to each case is organized and readily available in that case.  To copy an email to a case, simply drag the email from the list on the right and drop it onto a case in the Contacts Manager on the far left of your screen. Alternatively, the Cases list in the bottom left side of the Email Manager shows recently used cases. If the case you want is shown in that list, you can drop the case there.

**Show email drop history:** If you accidentally drop an email into the wrong case, click this button to fix that mistake.




## 7.5 DeadlinesManager

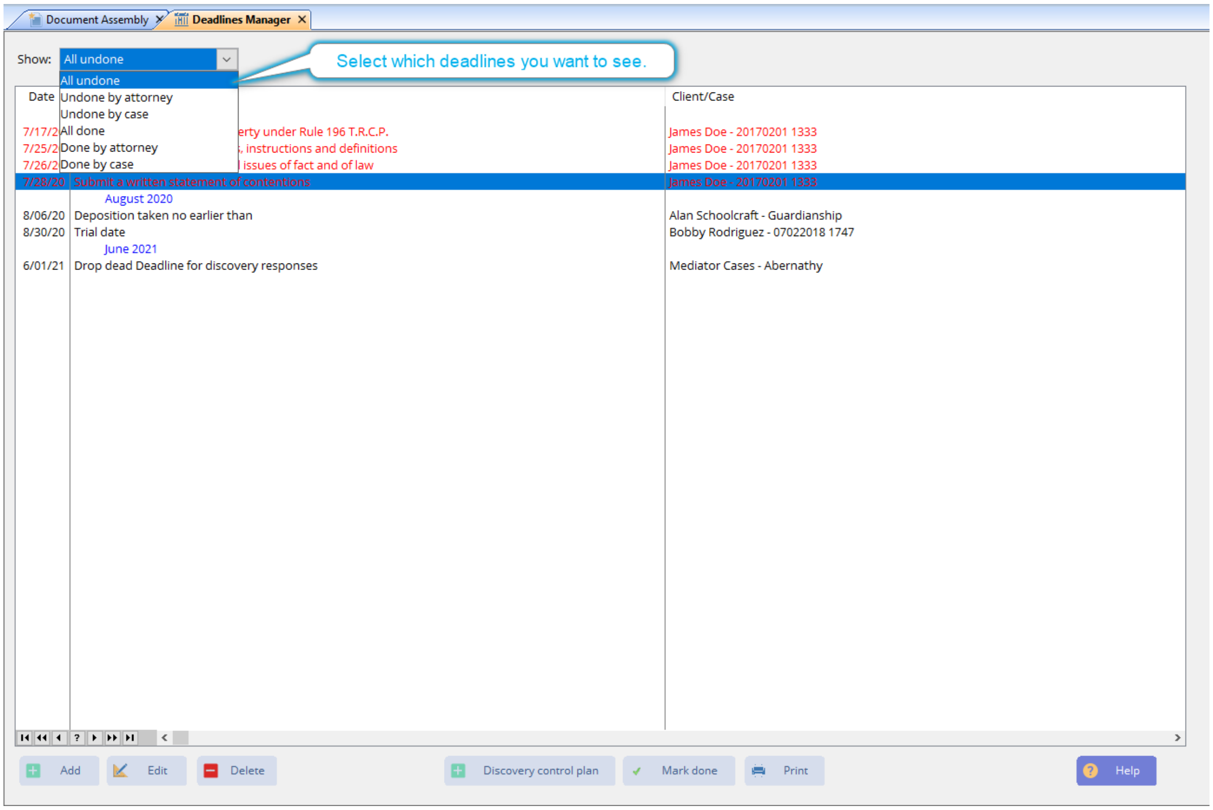
The Deadlines Manager gives you a single location for managing all deadlines for all members of your firm. From here, you can filter and see all deadlines. You can also open a window to create an entire discovery control plan and automatically add those deadlines into the manager.

All past due deadlines are colored red.

**Show:** Click the down arrow to set the filter to only show the deadlines you need to see.

**Discovery control plan:** Click this button to open the discovery plan window for creating an entire plan and adding those deadlines to the manager.

**Mark done:** After a deadline is met you can highlight it and click this button to remove it from the list.




## 7.6 PhoneSlipsManager

The Phone Slips Manager provides a single location for managing all outstanding phone messages for everyone in the firm. Phone slips will remain on this list until they are explicitly close.

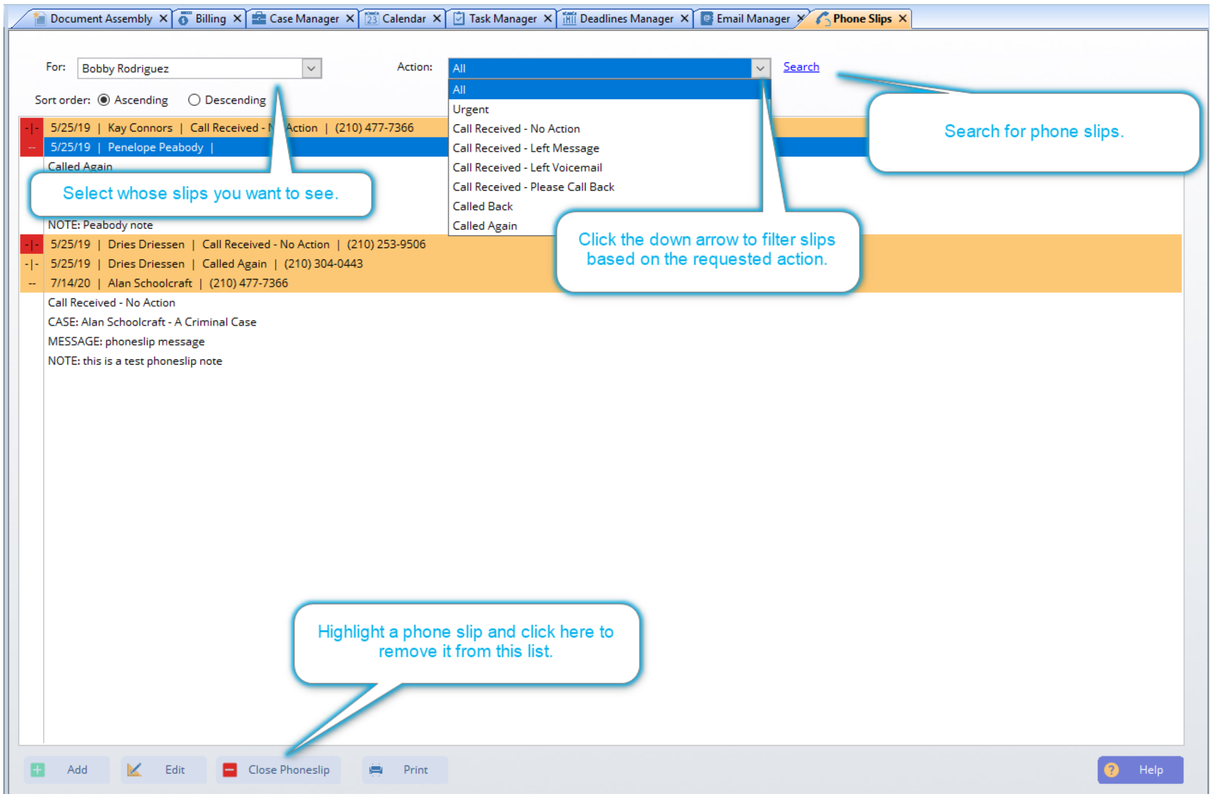
Phone slips that are flagged as urgent are shown in red.

The main line for the phone slip shows the date, who called, the requested action and a callback number. Below the main line, you may see one or more additional lines showing the call history, the case it relates to, any message the caller left, and note from the person who took the call.

**For:** Select whose phone slips you want to see.

**Filtering by contact or case:** When you click on the drop arrow to select whose phone slips you want to see, you will notice that at the very bottom of that list there is "Contact or Case". If you select this option, then you will be able to select a contact or case and the list will show all phone slips that relate to that contact or case.

**Close Phoneslip:** You do not have the ability to delete phone slips from the system. To remove it from this list, highlight the phone slip and click Close. Once a phone slip is close it will no longer appear in this manager but it will continue to be visible in the Case Manager if the slip was associated with a case.



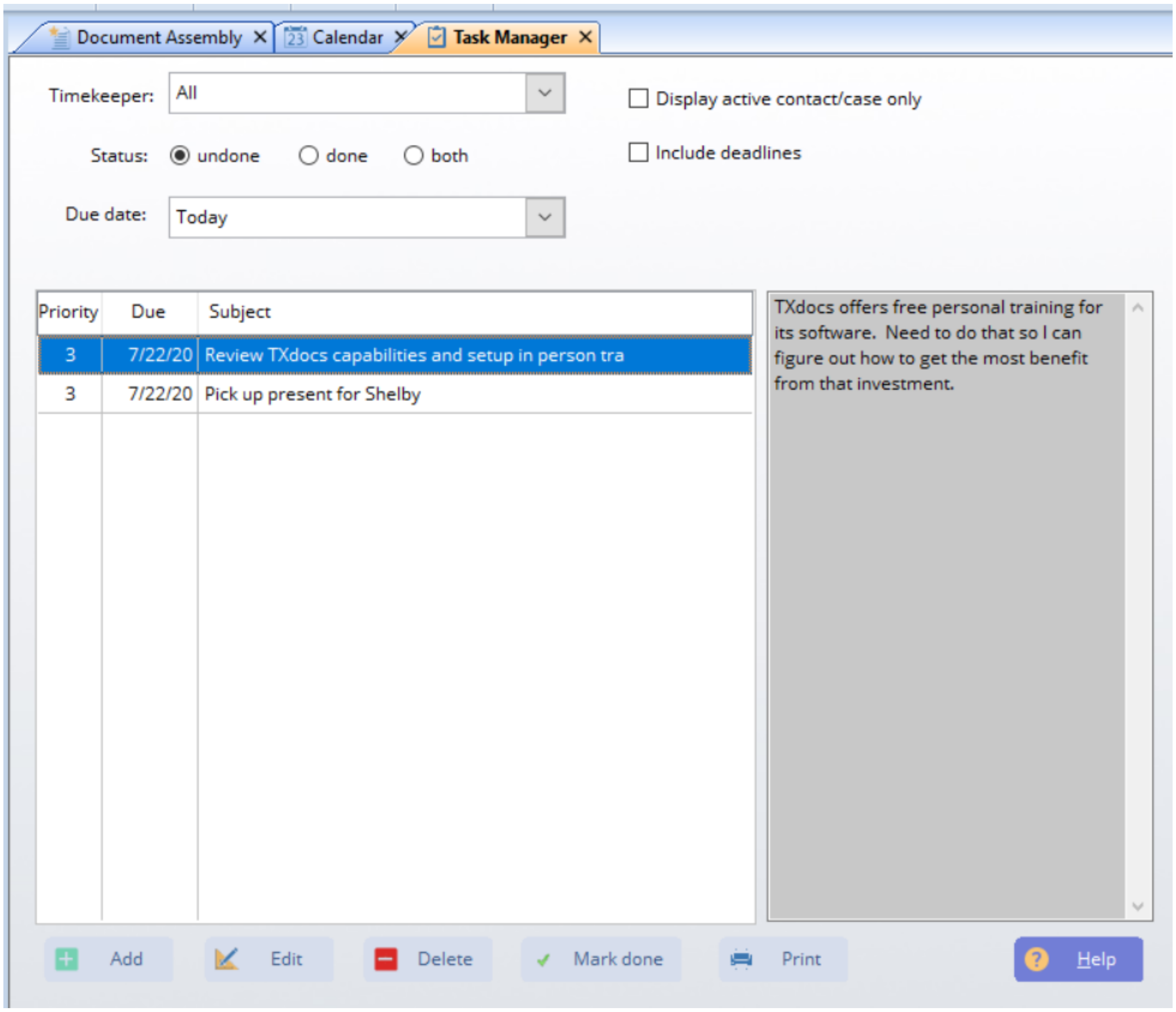

## 7.7 TaskManager

Tasks are things that need to be done but that are not nearly as time critical as a "Deadline". Think of a Task as a TODO item. Often these items are personal in nature although you can associate a contact or case with a task.

**Timekeeper:** Select whose Tasks you want to see.

**Display active contact/case only:** This option will cause Task Manager to only show Tasks associated with the contact or case that is selected in the Contacts Manager.

**Include deadlines:** This option just gives you the option of seeing in one location everything that needs to be done. It will add deadlines to the list.



# How to...

# 8 How to...

## 8.1 Bar Forms

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

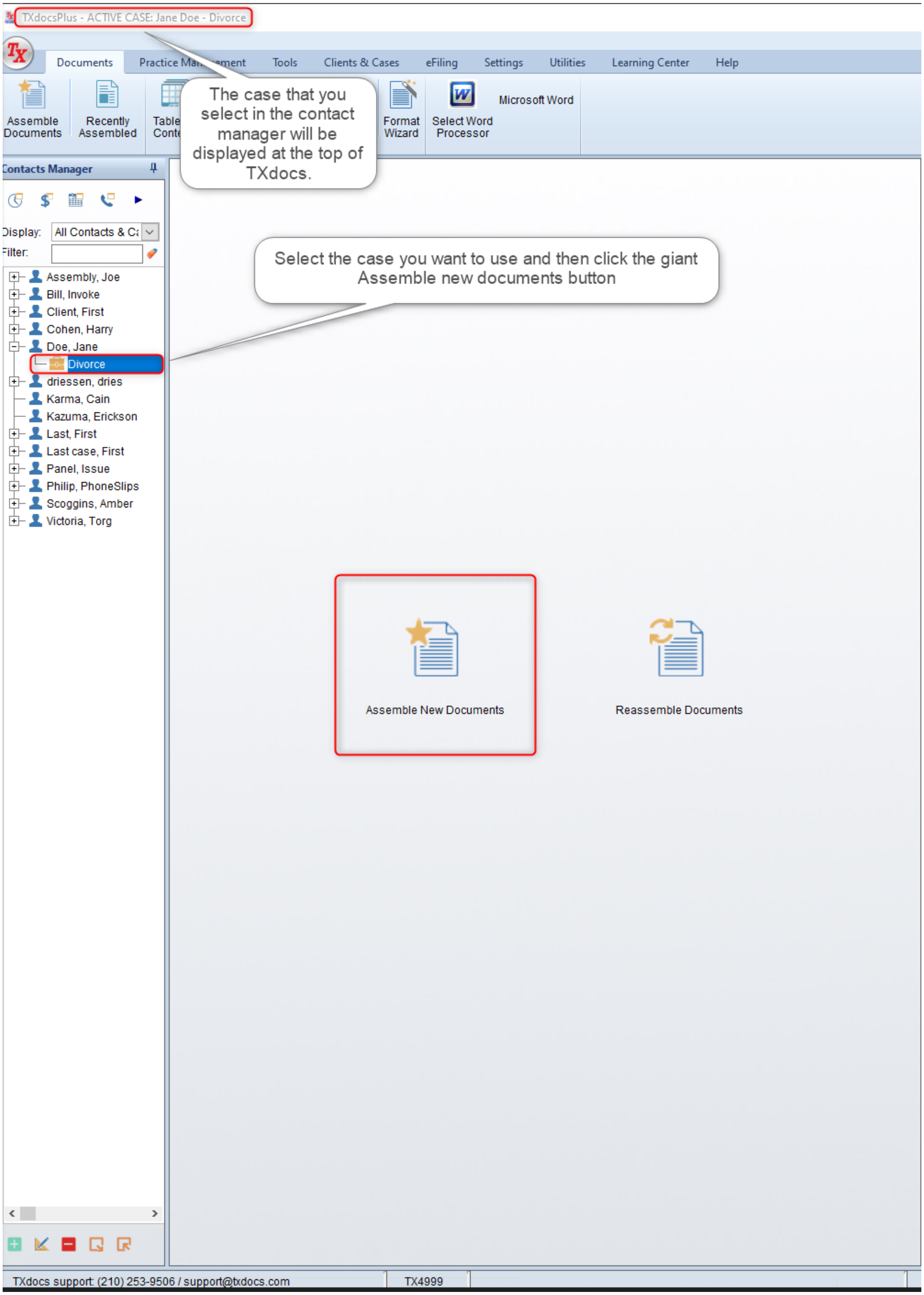
## 8.2 How to Assemble Documents_2

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

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

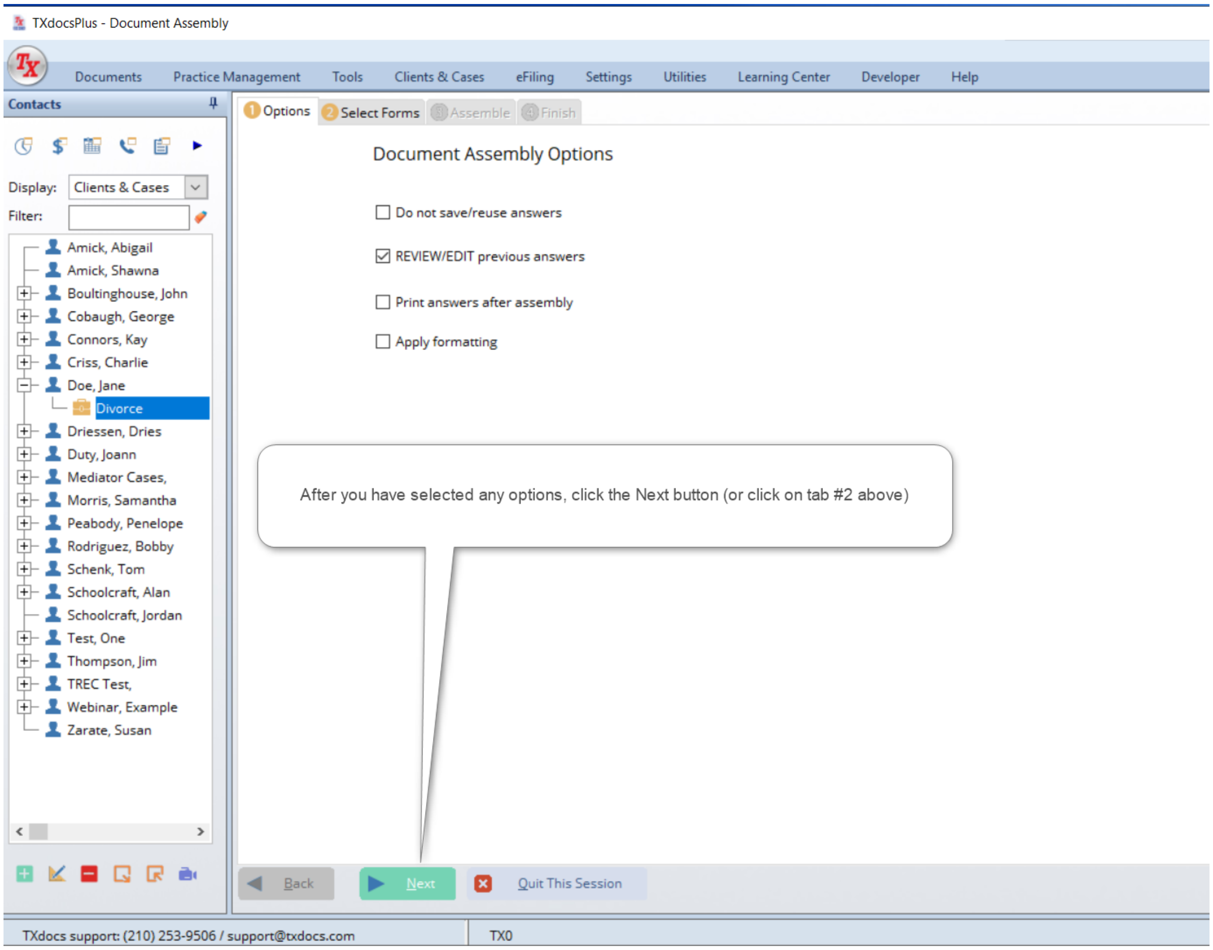
**To get started, select the case you want to use and then click the giant Assemble New Document in the middle of the main window**


TXdocsPlus - ACTIVE CASE: Jane Doe - Divorce
Documents
Practice Management
Tools
Clients & Cases
eFiling
Settings
Utilities
Learning Center
Help
Assemble Documents
Recently Assembled
Format Wizard
Select Word Processor
Microsoft Word
The case that you select in the contact manager will be displayed at the top of TXdocs.
Contacts Manager
Display: All Contacts & C
Filter:
Assembly, Joe
Bill, Invoke
Client, First
Cohen, Harry
Doe, Jane
Divorce
driessen, dries
Karma, Cain
Kazuma, Erickson
Last, First
Last case, First
Panel, Issue
Philip, PhoneSlips
Scoggins, Amber
Victoria, Torg
Select the case you want to use and then click the giant Assemble new documents button
Assemble New Documents
Reassemble Documents
TXdocs support: (210) 253-9506 / support@txdocs.com
TX4999

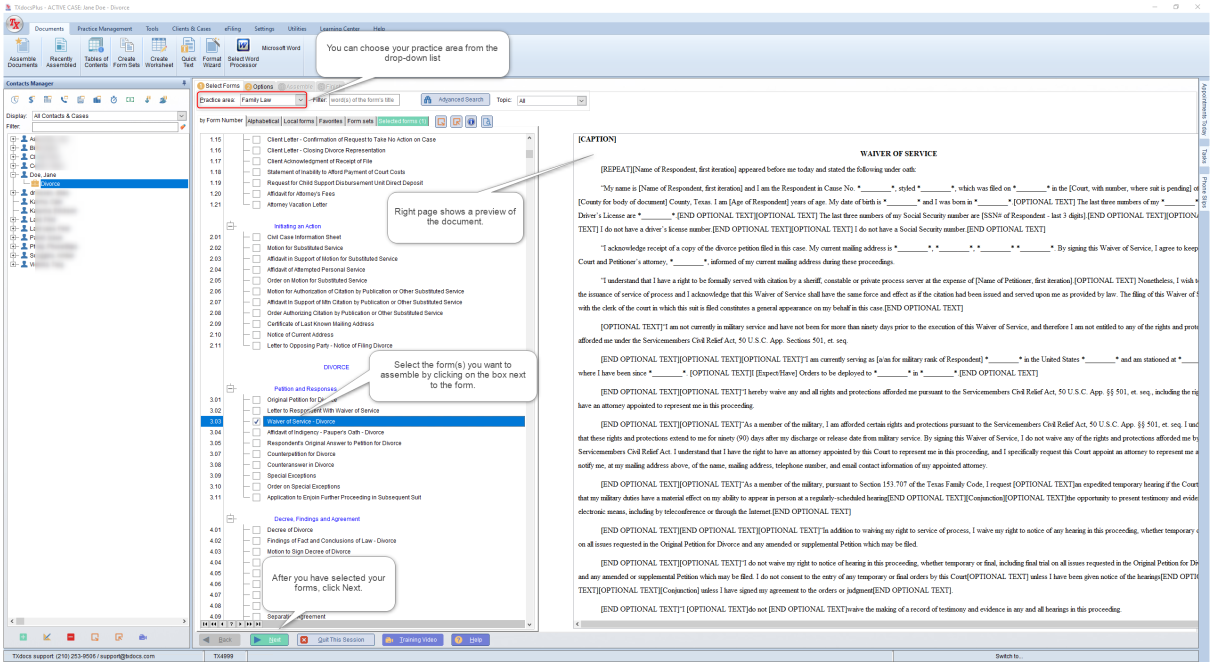
## STEP ONE

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



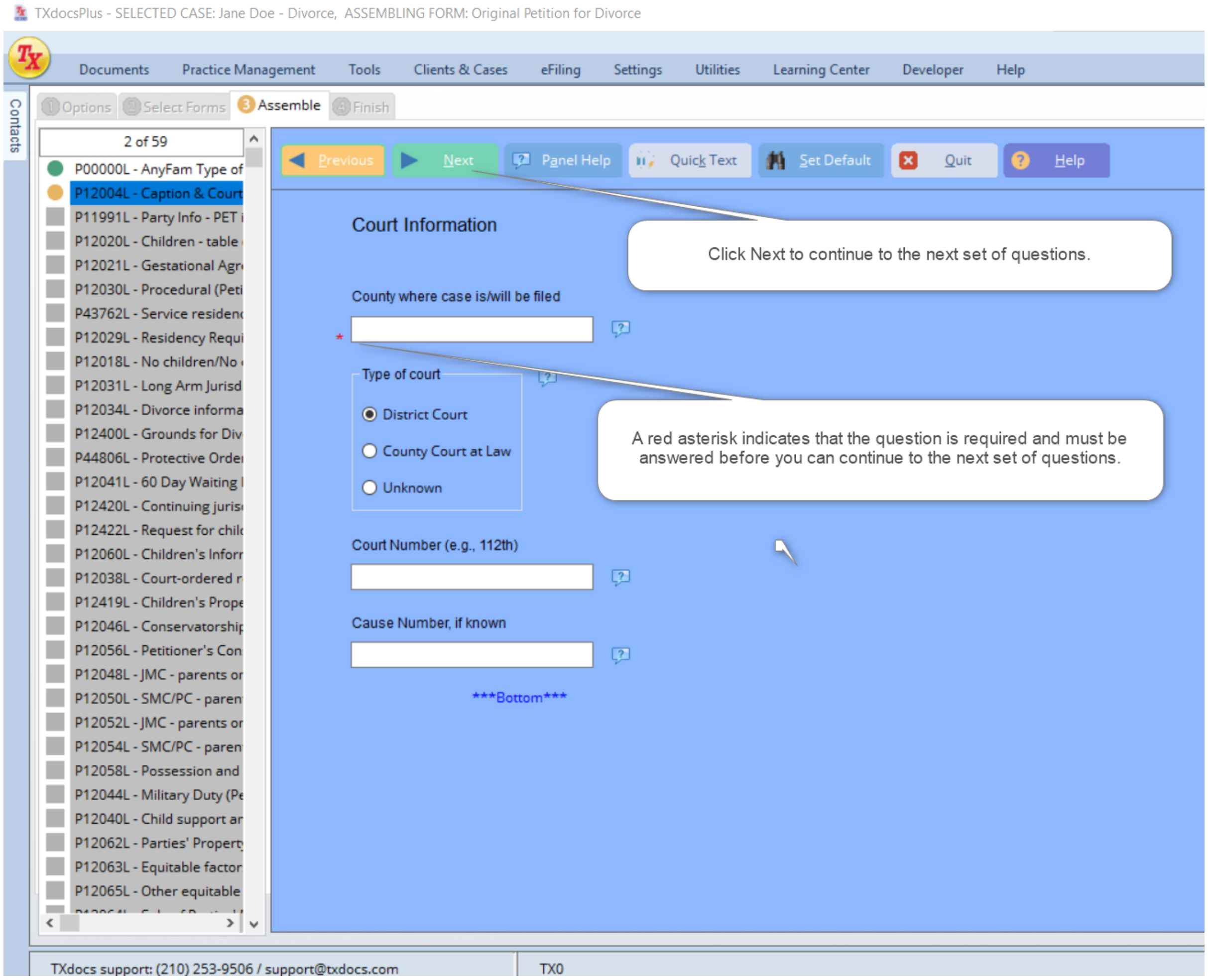

## STEP TWO

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



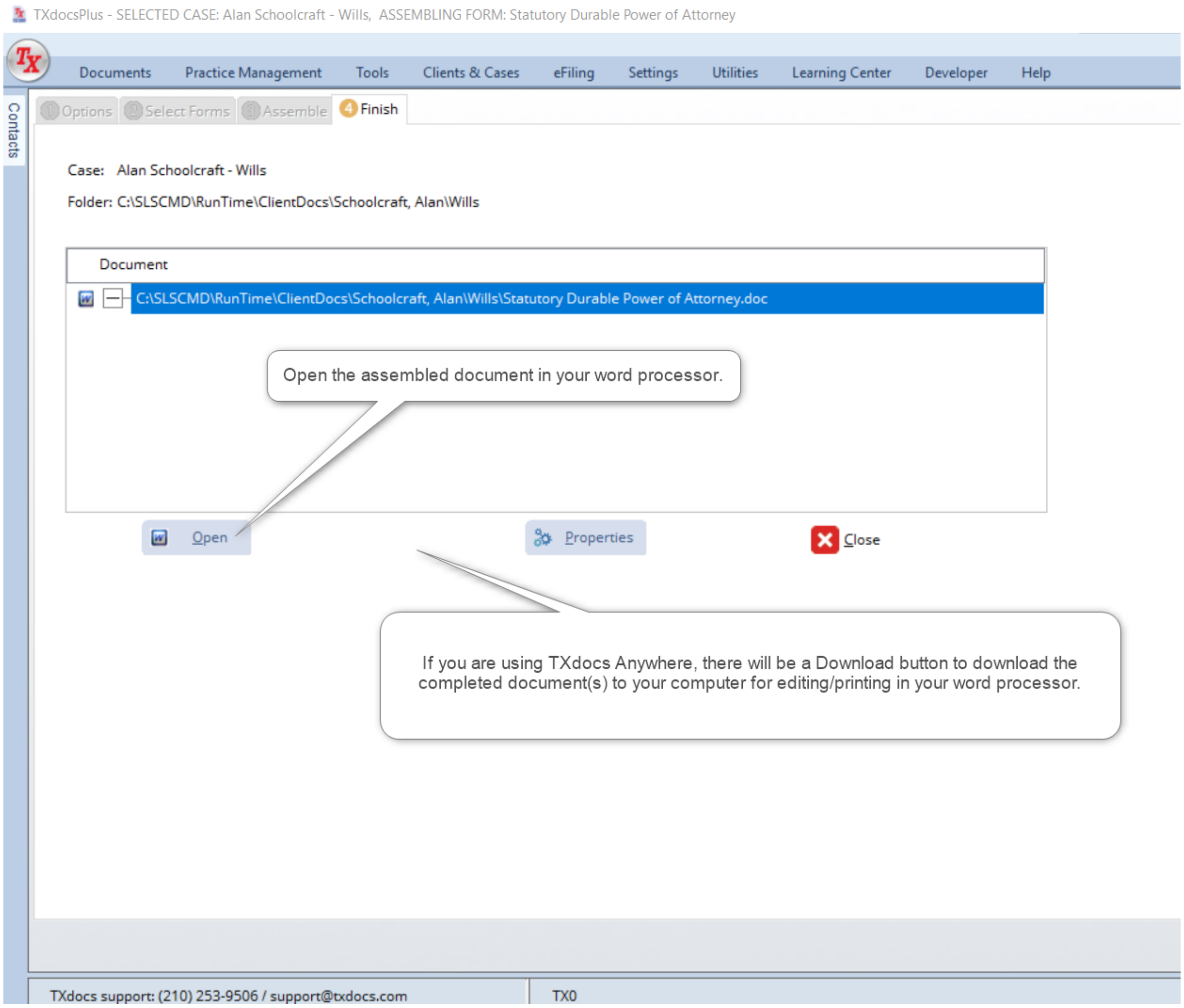

STEP THREE

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




## STEP FOUR

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



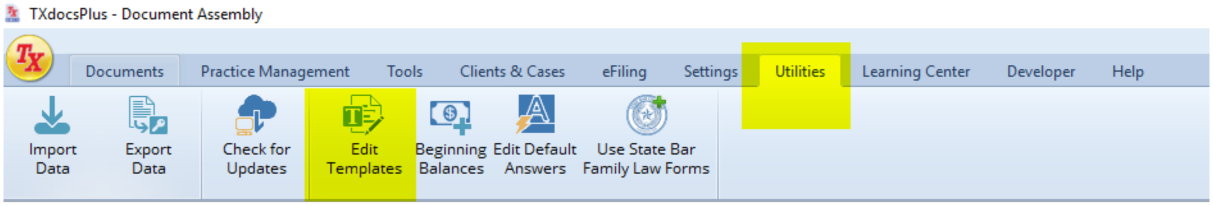

## 8.3 How to Edit Templates

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

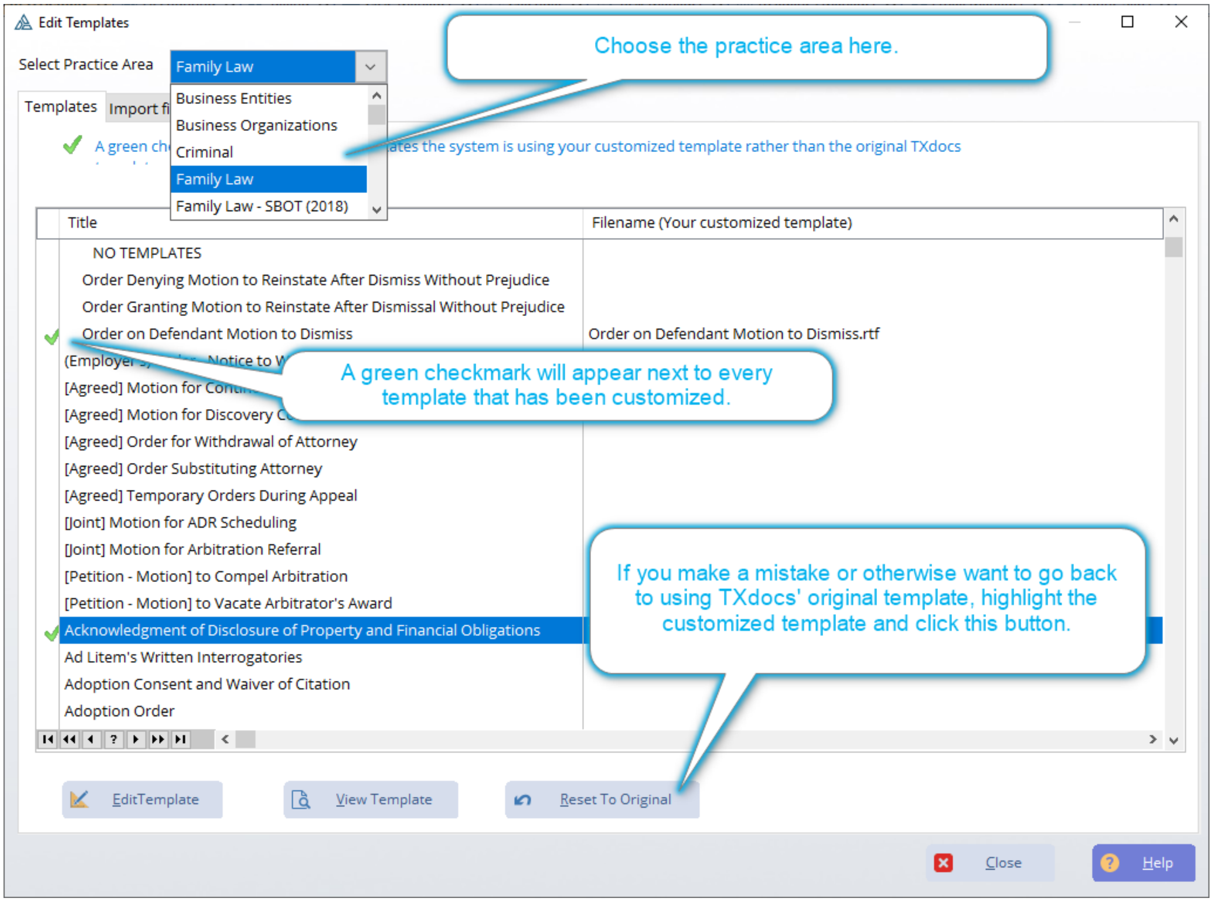
1. If you change a template, TXdocs will no longer be able to update that template if the law changes. That means you will have to remember to go back into the changed template and update it yourself.

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

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




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




## 8.4 How to Edit Templates in Anywhere

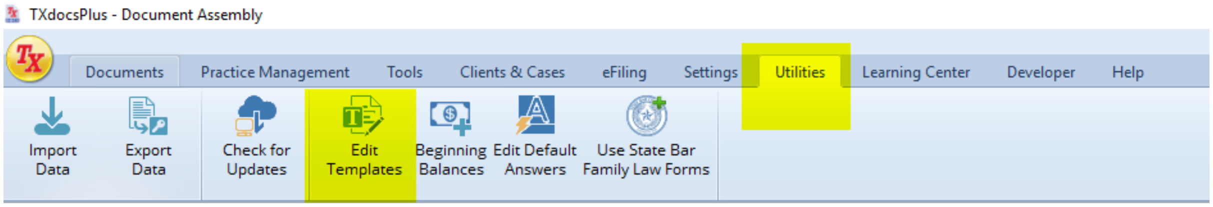
TXdocs contains a template for every form in our menu. These templates contain standard language that will be included in the documents you assemble. You can change these templates so that

TXdocs will assemble a document using different language from what we provide. BUT, there are two very important points you should know before you make any changes:

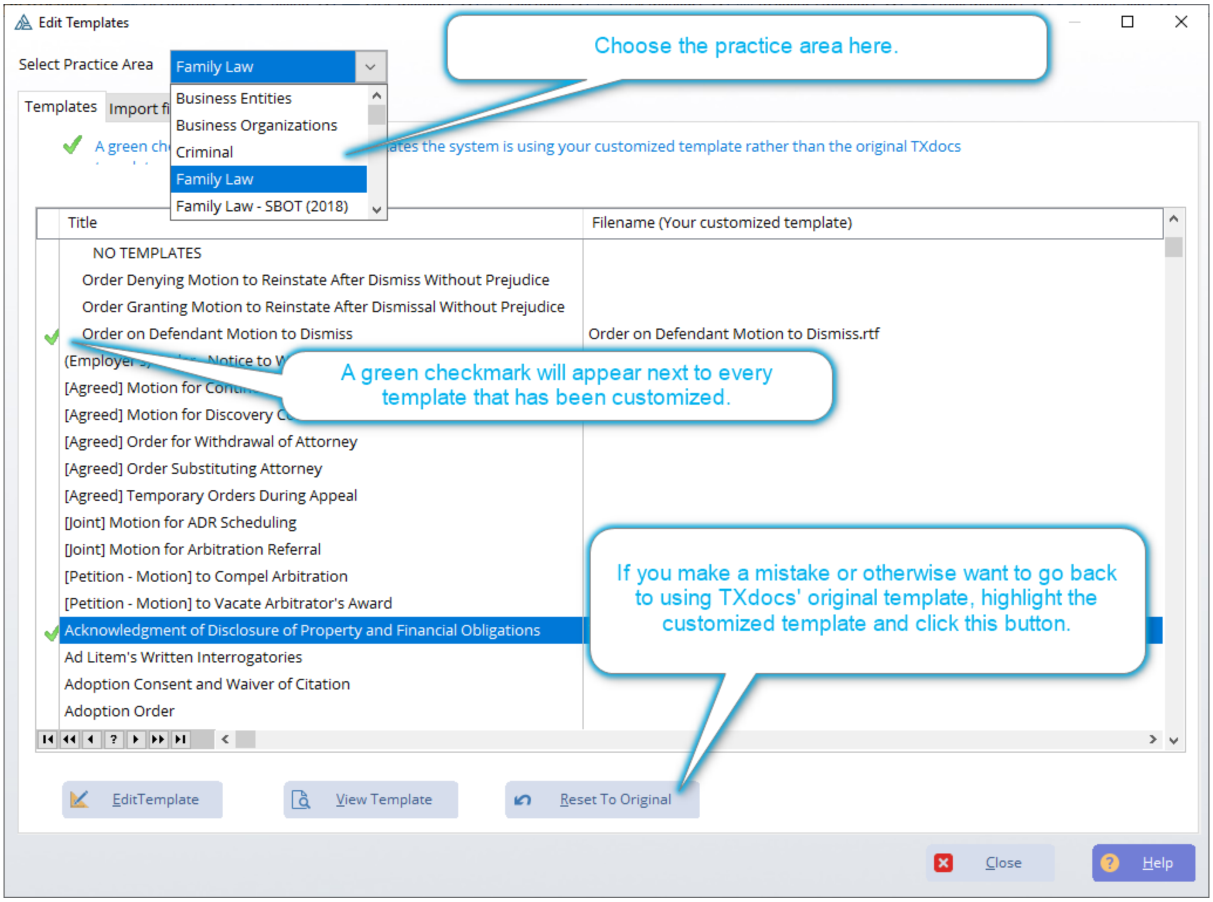
1. If you change a template, TXdocs will no longer be able to update that template if the law changes. That means you will have to remember to go back into the changed template and update it yourself.

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

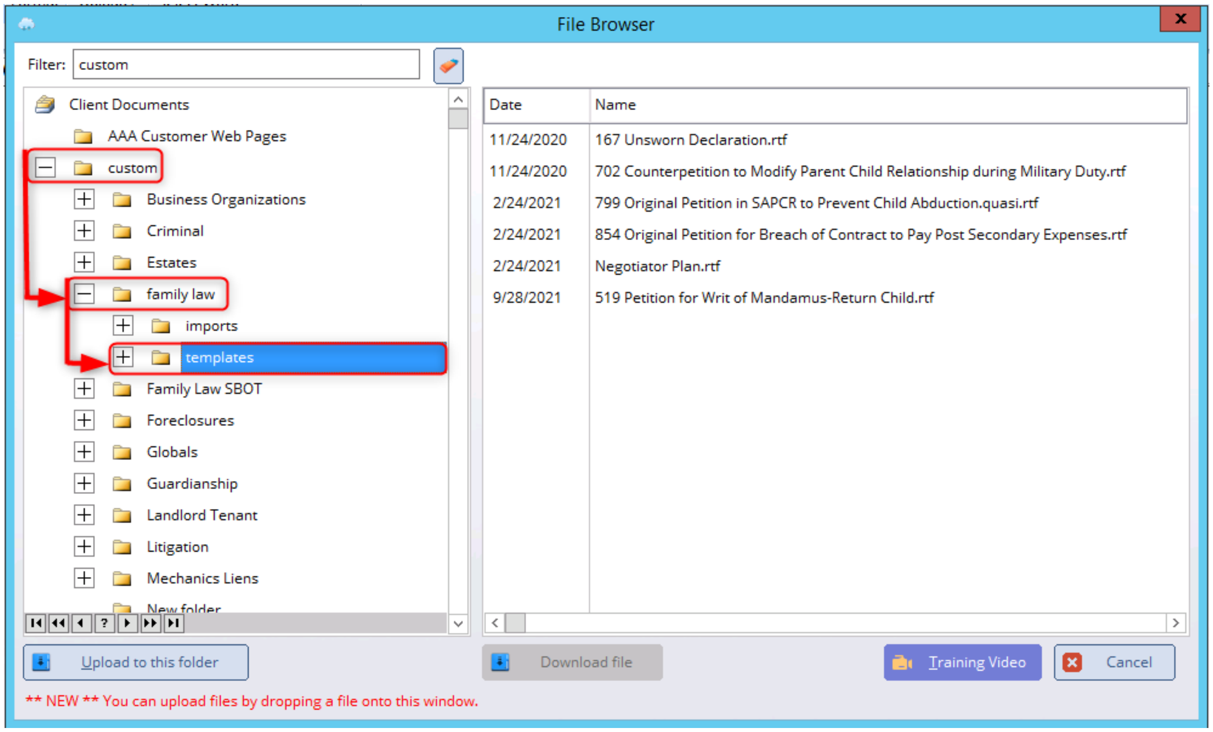
To get started, select **Edit Templates** on the **Utilities** ribbon bar.




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



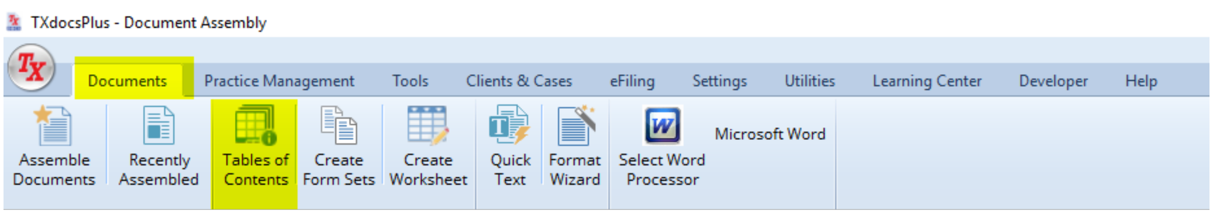

After clicking on Edit Template a copy of the template will be downloaded to your machine. When downloaded open the document in your word processor of choice. Change the Text to your preferred wording (***Do not rename the downloaded Document***) then upload the document back into TXdocs. Upload by dragging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



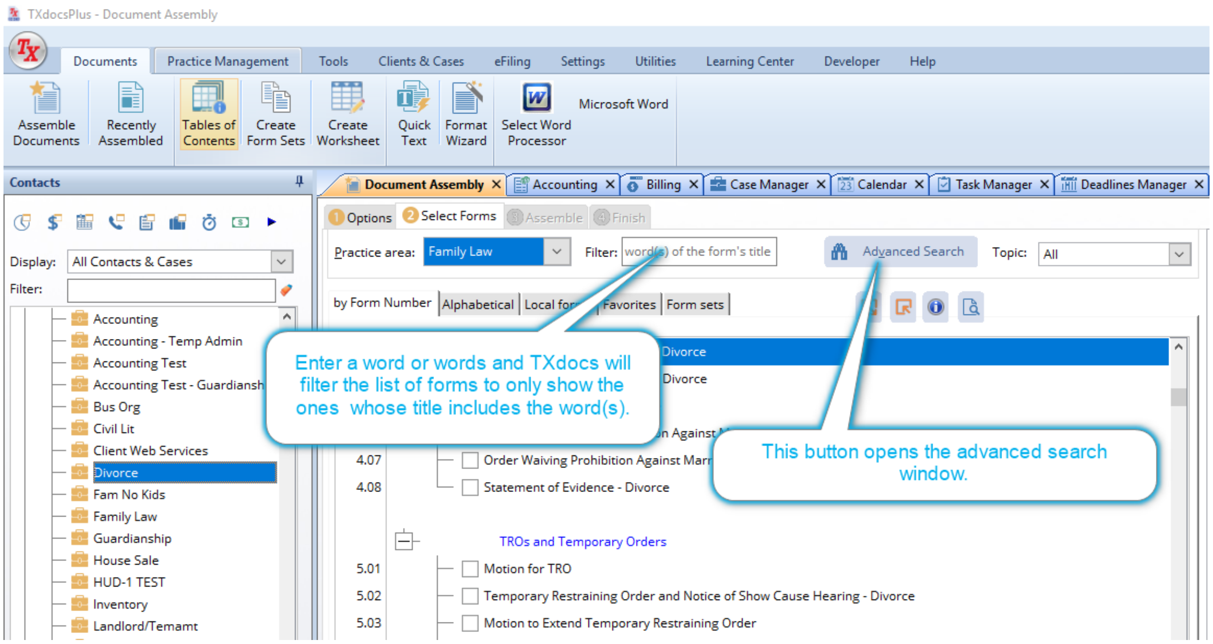

## 8.5 How to Find a Form

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

Here is where you find the table of contents:




You can also search for forms when assembling documents.




## 8.6 How to find Assembled Documents

After a document has been assembled it can be located on your computer. For Classic users this will be in your client documents folder on C:\TXdocs\Clientdocs. For anywhere users this will be in the upload/ downloads folder.

On TXdocsPlus you will be able to see your assembled documents int the case manager tab. Selecting documents allows you to efile, reassemble, and download/open.

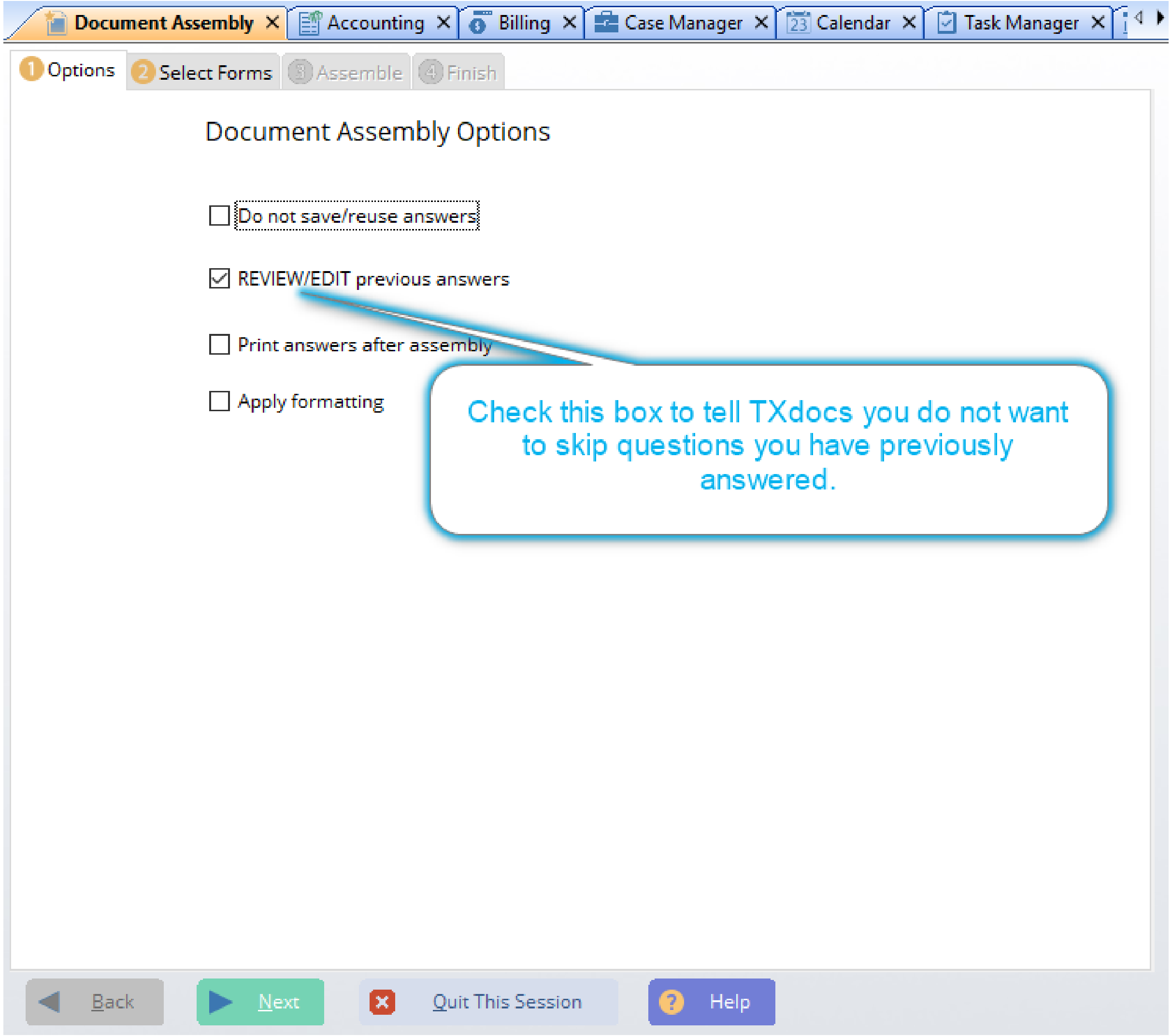
## 8.7 How to Manage Form Sets

On the tab documents you can select Create a formset. This option lets you select a practice area to add forms that are often assembled together as part of a common set. You can select this set from the assemble new documents window by clicking on the tab formset.

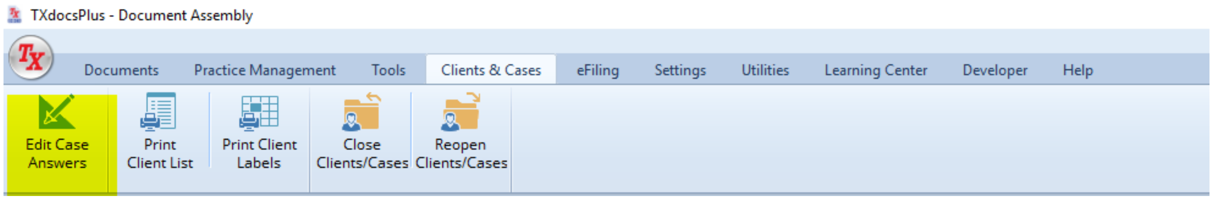
## 8.8 How to Edit Case Answers

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

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




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



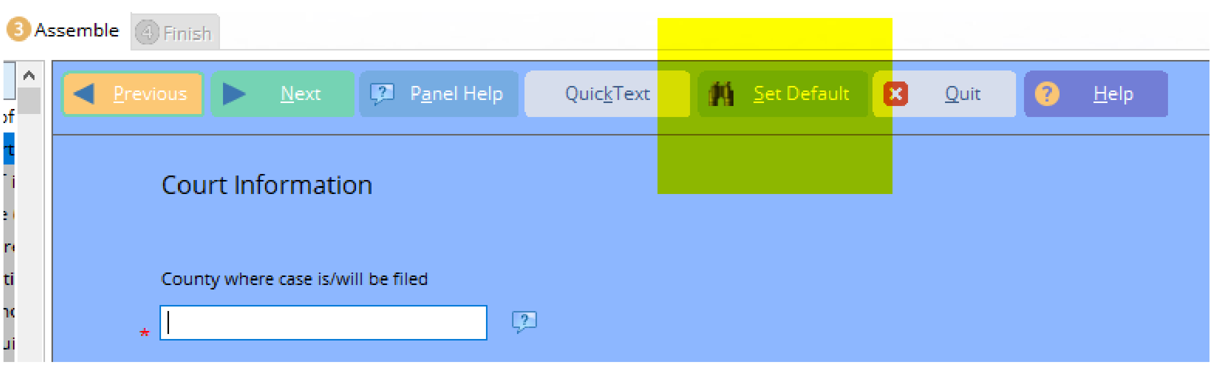

Edit Case Answers window

## 8.9 How to Set Default Answers

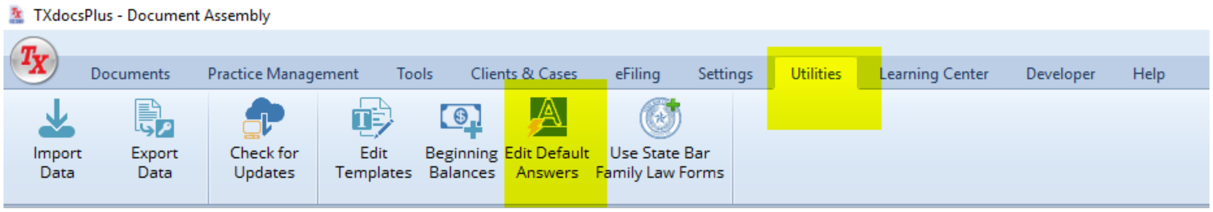
A default answer is an answer that will display the first time a question is asked in a case. If the default is correct, simply continue on without having to type anything. If not - just type over it. Setting default answers saves you time and effort, not to mention it relieves you from the tedious task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

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

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




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




## 8.10 How to Undo a billing statement

**To Undo a statement:** you need to go to the statements tab located in the billing manager's account details page. When on the statements tab you will have the option to undo your bill. If you have multiple bills for the case you must undo the bills from the most recently created bill(s) first. When a bill is undone the timeslips, expense slips, payments trust changes, and credits will be marked as unbilled again. You can redo the bill by going to the statement tab. If you are undoing a consolidated bill this will undo the other cases last billed items as well. Lastly if LawPay is enabled you should first delete the invoice that LawPay has before undoing the bill. Click  the delete from LawPay button to remove the invoice. Note: This will not send out a message to the client that the bill has been retracted, nor does TXdocs allow a bill to be deleted from LawPay if the client has paid the bill.