

# **TXdocsPlus**

## **USER MANUAL**

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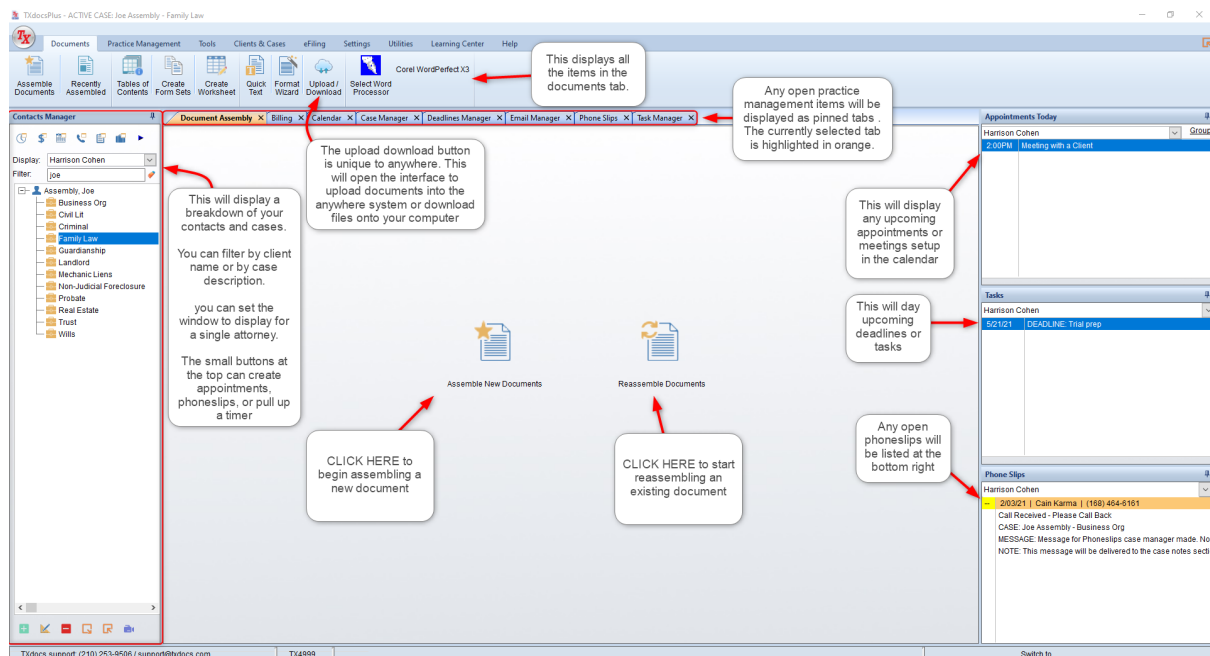


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# Introduction

## 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.

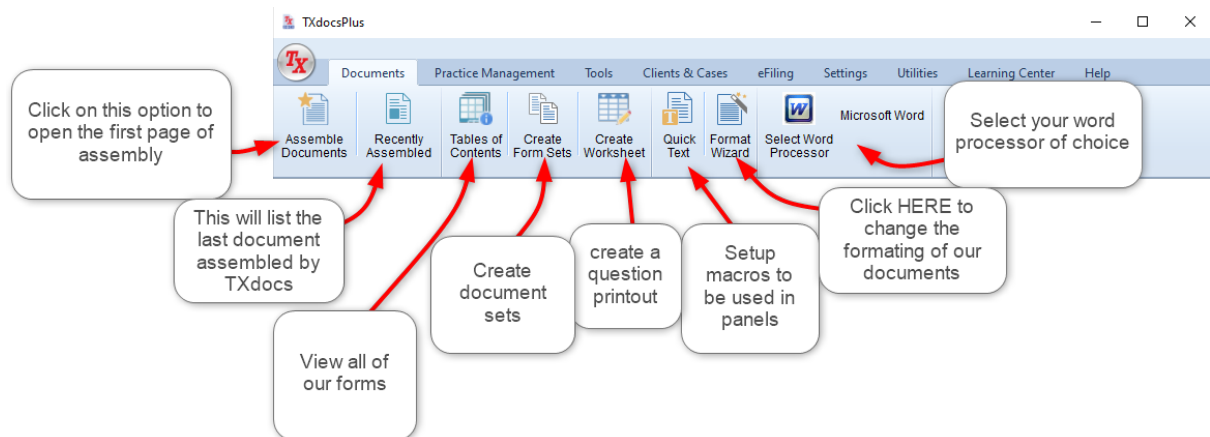


TXdocs is organized in 8 major categories:

- (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

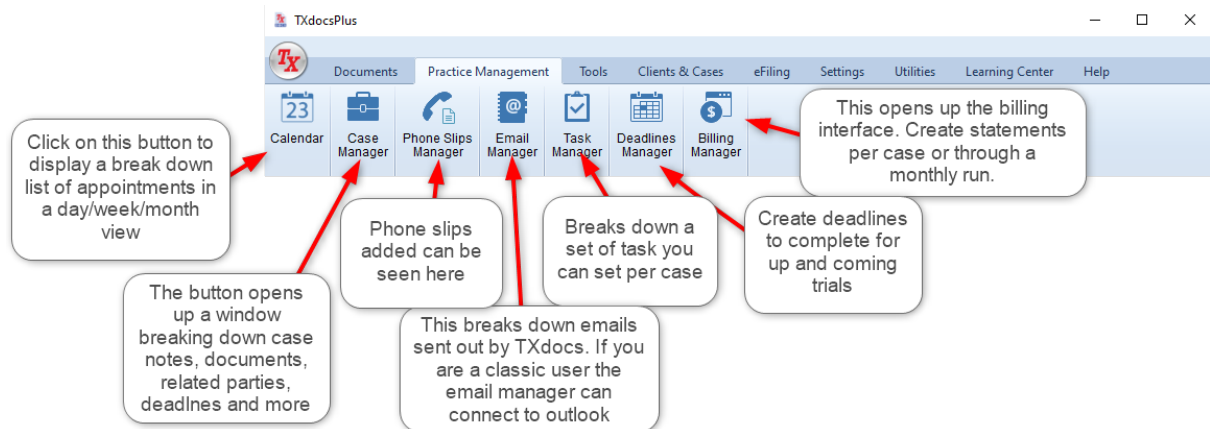
Each category can be selected by clicking the appropriate tab at the top of the ribbon bar

## DOCUMENTS TAB



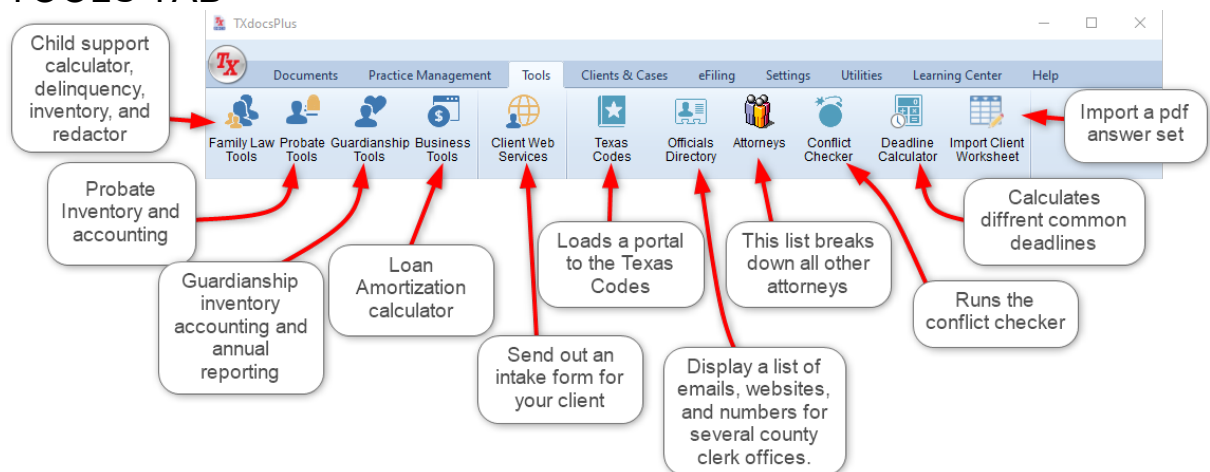
## Documents Tab information

### PRACTICE MANAGEMENT TAB



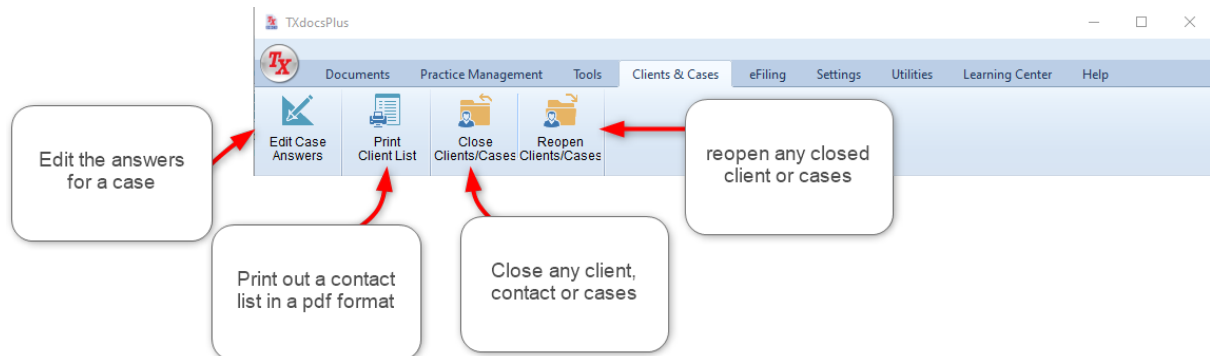
## Practice Management Tab information

### TOOLS TAB



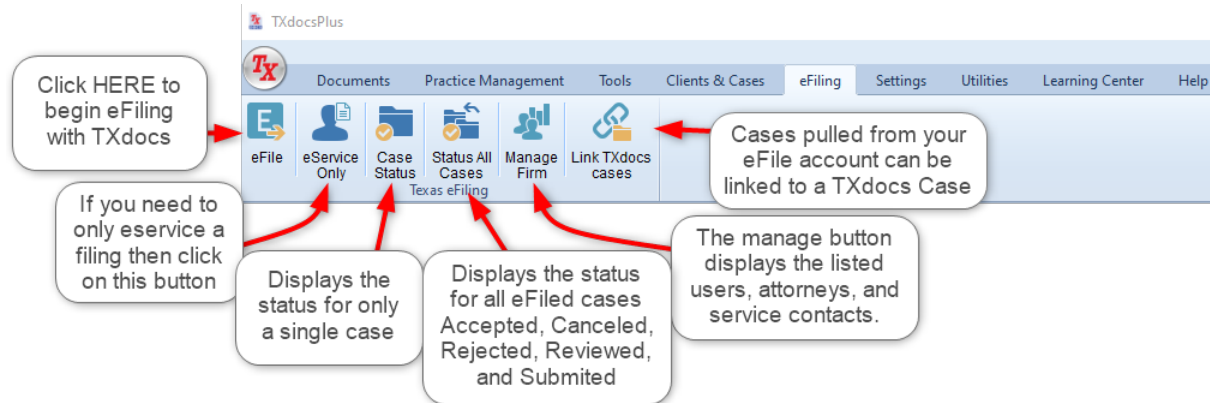
## Tools Tab information

### CLIENTS & CASES TAB



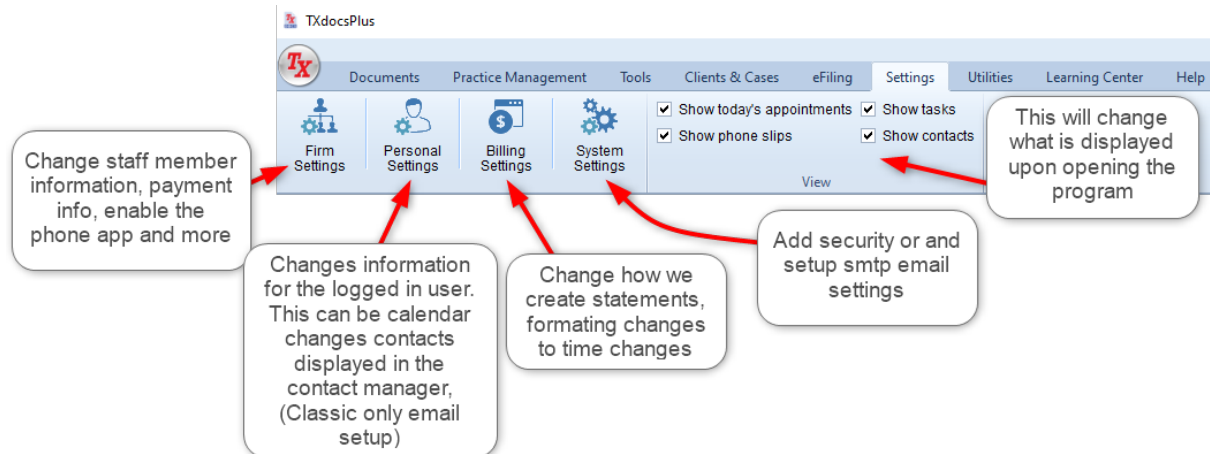
## Clients & Cases Tab information

### EFILING TAB



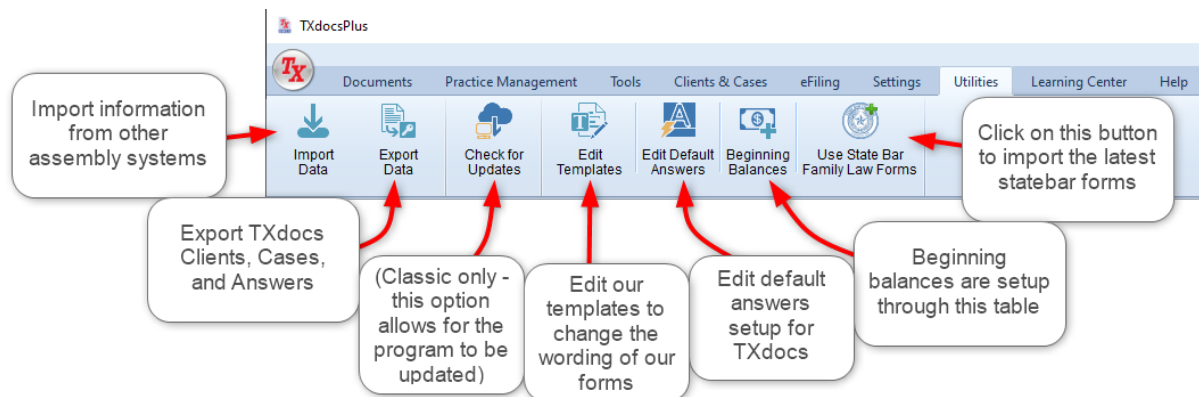
### eFiling Tab information

### SETTINGS TAB



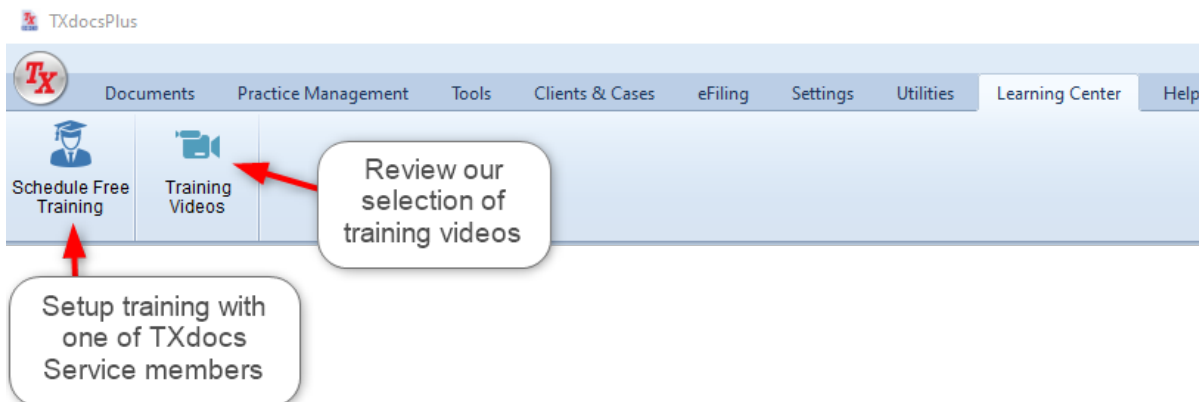
### Settings Tab information

### 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 in the long run.

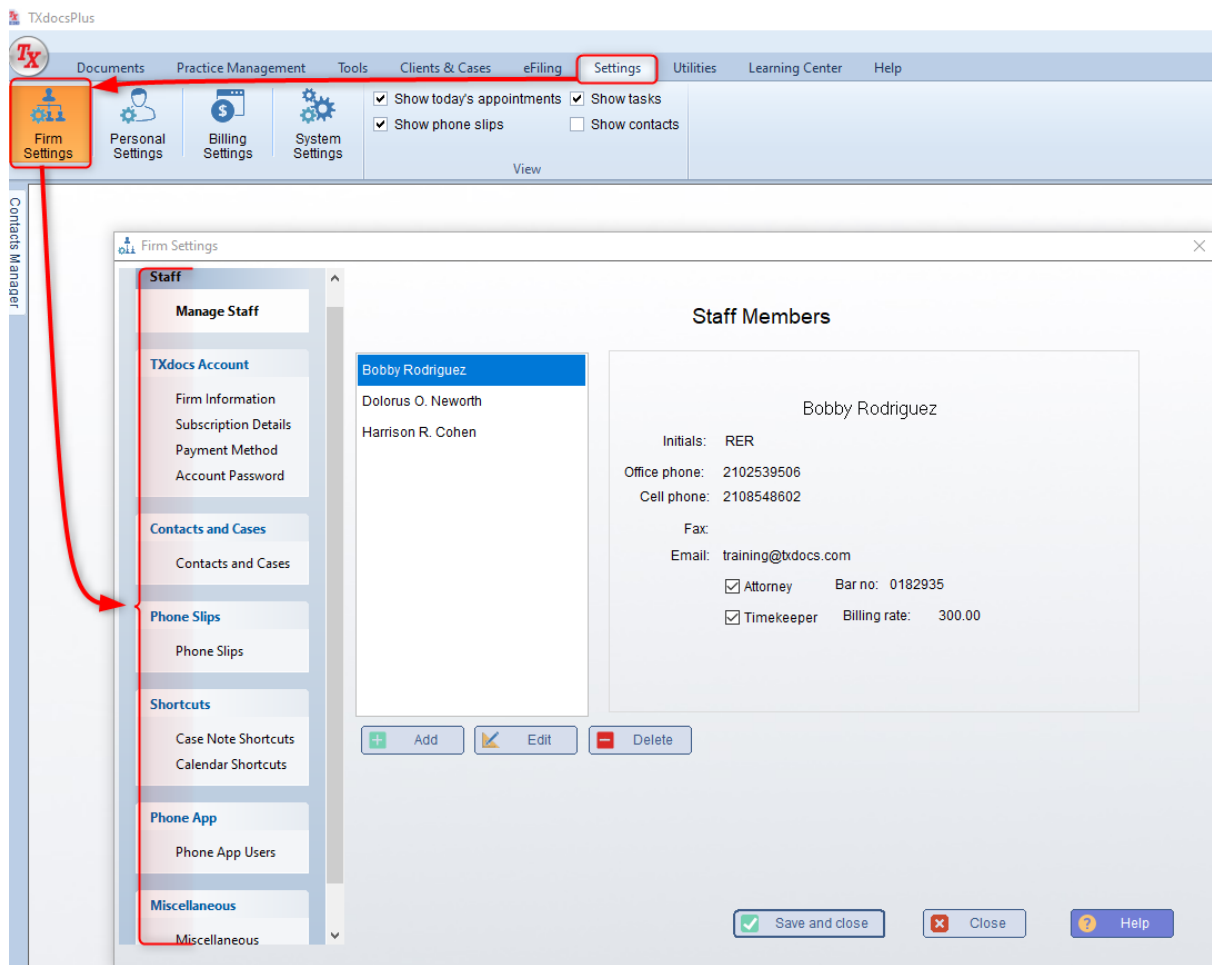
### Setup - Firm Settings

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 files 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 efilng service and auto save

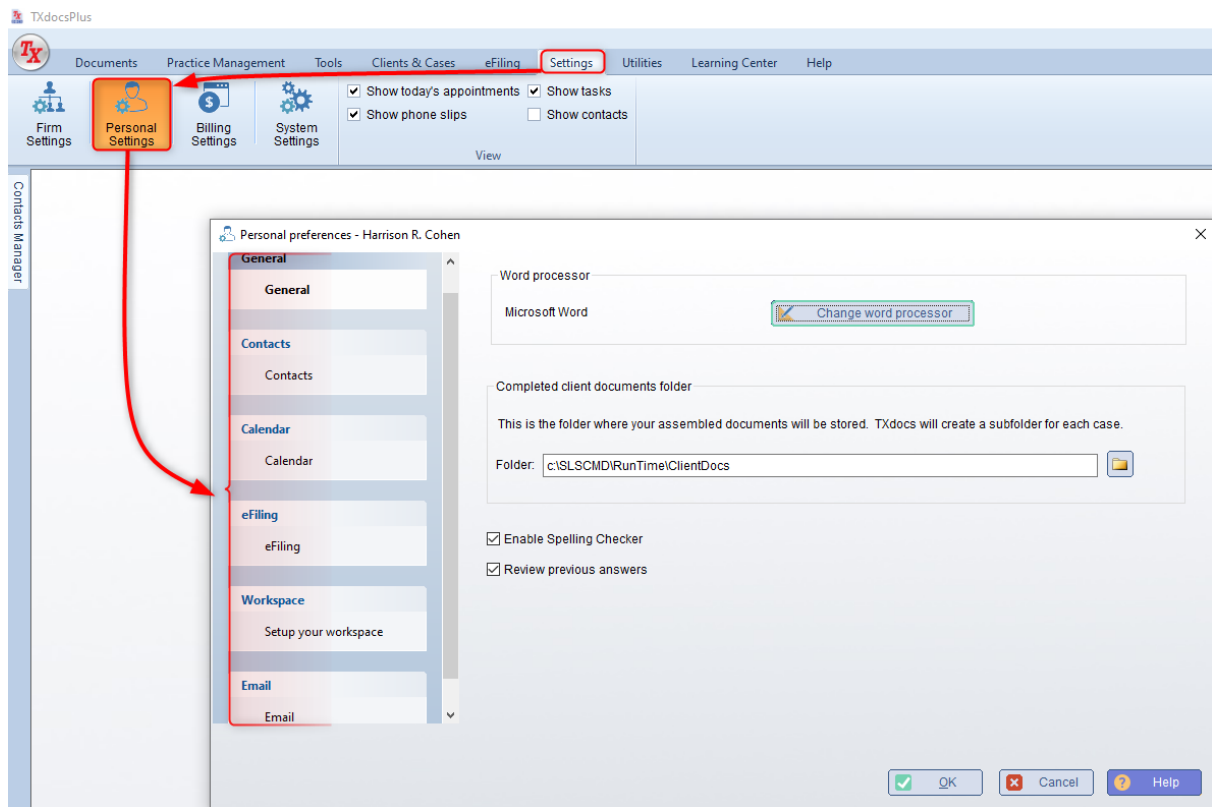




## Setup - Personal Settings

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.

Staff Information Will Be Changed

General Digital Signature

Name: Harrison Cohen Initials: HRC (to sign on)

Office phone: (210) 253-0506 Cell phone: (555) 555-5555 Fax: (555) 555-5555

Email: support@txdocs.com

☒ Attorney Bar No: 123456789

☒ Timekeeper - calendar & billing

Hourly billing rate: 350.00

Regular event color: Color not set

Recurring event color: Color not set

☒ Mobile app login allowed App Password: [Redacted]

☐ Use alternative email for reminders

☐ Use alternative phone for reminders

☐ Include me in TXdocs' informational emails

Signature block for letters: Sincerely, Harrison Cohen

Signature block for pleadings: TXdocs  
404 Pat Booker Rd., Suite A  
Universal City, TX 76148

After inserting your password we hide the character that make up the password

After inserting your password we hide the character that make up the password

OK Cancel Help

Staff Information Will Be Changed

General Digital Signature

A digital signature, or e-signature, refers to data in digital form which is used by the signatory to sign.

Digital signature for Harrison Cohen

Type of e-Sign

☒ Text Example: /s/ Harrison Cohen

☐ Image

Let TXdocs automatically e-Sign assembled documents

☐ Never

☐ Always

☒ Ask during assembly

After completing the last panel for a template a message will appear asking if you want to digitally sign your document(s).

OK Cancel Help

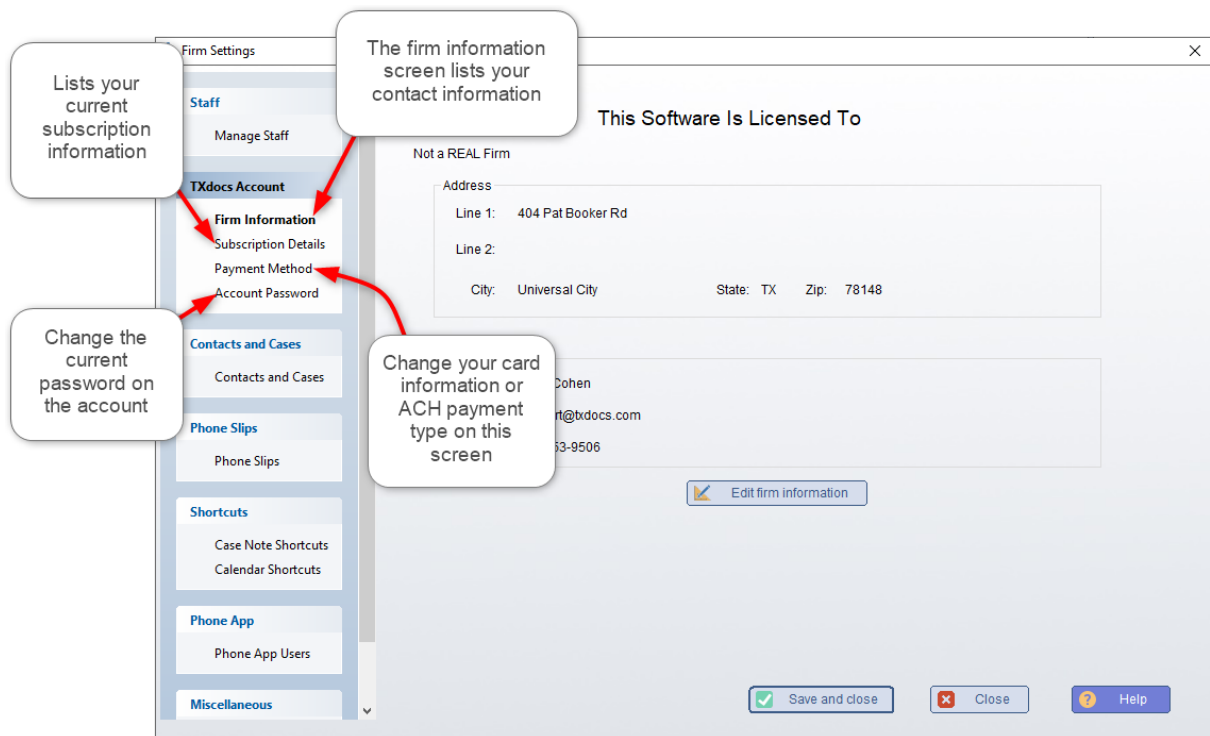
### 3.1.2 TXdocs Account

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

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

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

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



### 3.1.3 Contacts and Cases

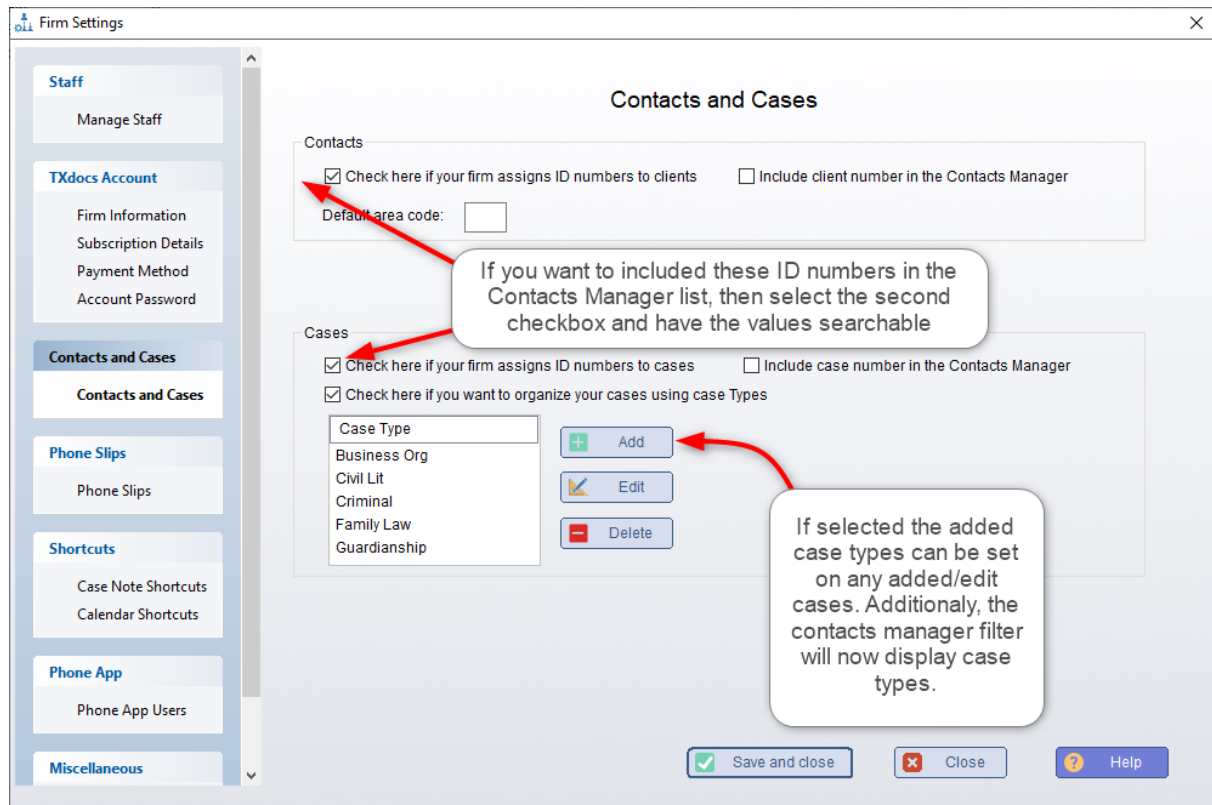
**Check here if your firm assigns ID numbers to Clients:** Some firms assign ID numbers to clients as they open them. For example "2021-ALS-132". If you want to include client ID numbers when you add a client to the system check this box.

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

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

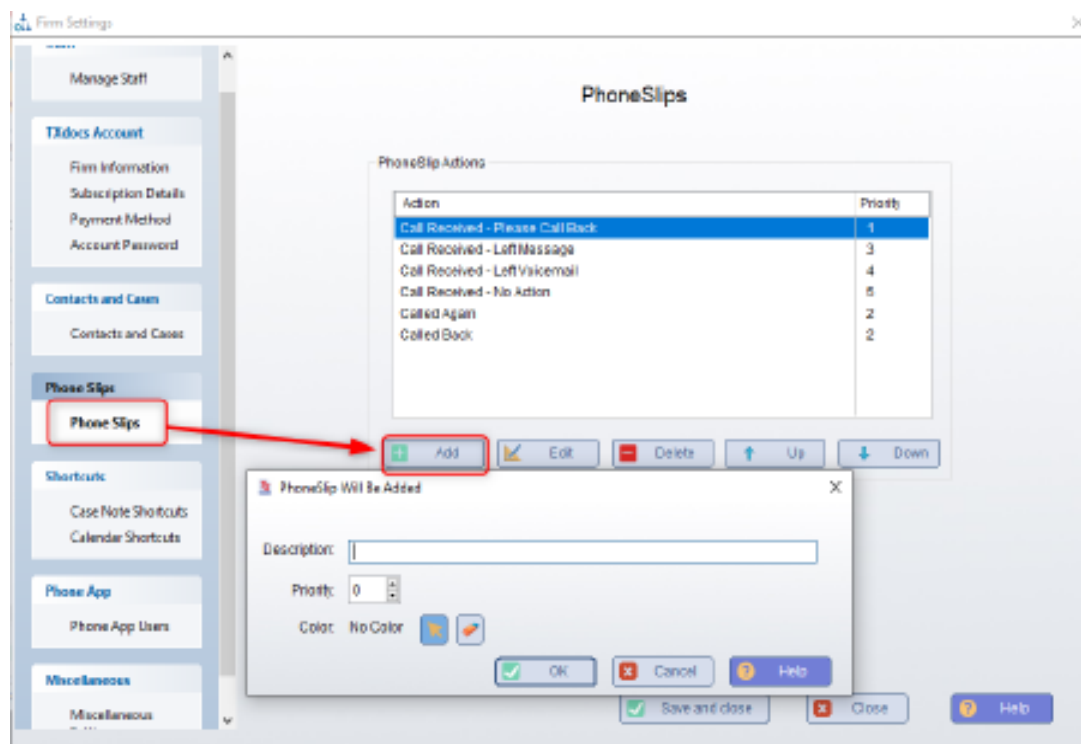
**Check here if you want to organize your cases using case types:** If you check this box then you can add as many case types as you wish: You can use general types such as "Family" or "Criminal" or you can be even more specific like "Divorce" or "Set Bond ". You will be able to sort, filter and report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

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



### 3.1.4 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 from 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.

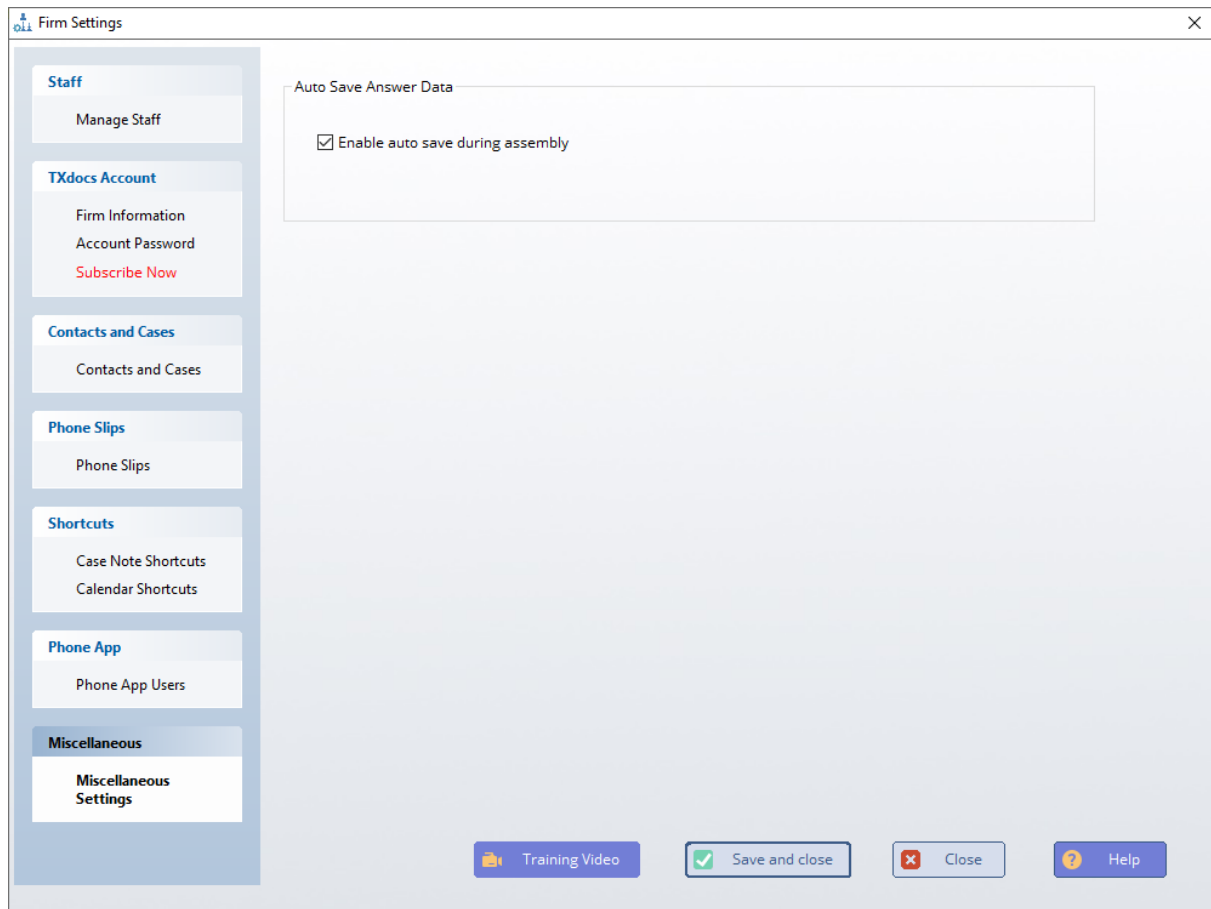
You can download a short manual on how to setup and use the TXdocs phone app here:

[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.

**Billing Settings**

**Billing**

- Billing Preferences**
- Customize Statements
- Expense Types
- Document Pricing
- Rate Schedules
- Billing Shortcuts
- Statement Email
- Trust
- LawPay

### Billing Preferences

**Billing defaults**

Statements are due  days after the statement date - it can be changed as you generate statements

Printer: No Printer Selected [Select printer](#)

☒ Consolidate statements if client has multiple cases

☐ Allow Monthly Fee

Default Payment Type:

**Time Increments**

Increment Type

☐ Minutes

☐ Tenths Hour

☒ Hundredths Hour

Bill for time in increments of:  Hundredths of Hour ☒ Round up timer

Default timeslip duration:  Hundredths of Hour

☒ Statement date is Bill To Date

[Save and close](#) [Close](#) [Help](#)

Billing preferences first tab allows you to change how a statement time and fees are calculated

### 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.

Billing Settings

Billing

- Billing Preferences
- Customize Statements**
- Expense Types
- Document Pricing
- Rate Schedules
- Billing Shortcuts
- Statement Email
- Trust
- LawPay

Customize Statements

Format | Statement Number Style | Messages

- ☒ Show timekeeper's initials on statement
- ☒ Aged Receivables
- ☒ Long Description
- ☒ Use 'Invoice' vs 'Statement'
- ☐ Aggregate Previous Balances
- ☒ Show Timeslip Discount

Rate and/or Duration on statement

☐ Neither ☒ Both ☐ Rate Only ☐ Duration Only

Location of client's address on statement in inches

Left margin:  inches Top margin:  inches

Statement Format

☐ Original Statement ☒ Statement w/Sections ☐ Custom [Custom Design](#)

Upon first reaching the format screen you want to select a format type. Original will display all items together.

Sections will breakup items into categories Timeslips / Expense Slips / Payments.

Lastly Custom has the body of sections, but the heading can manipulated.

[Save and close](#) [Close](#) [Help](#)

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

Invoice date: 7/31/2020

Due date: 8/11/2020  
Total due: \$3,133.75

Cur:	30:	60:	90+:
1,487.50	318.75	1,327.50	0.00

Jane Doe

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

This shows a statement with sections.

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

Invoice Date: 7/31/20

Due Date: 8/11/20  
Total due: 3,133.75

Cur:	30:	60:	90+:
1,487.50	318.75	1,327.50	0.00

Jane Doe

Case: Divorce

**Previous Balances**

Date	Description	Amount
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
	<b>Previous Balance:</b>	1,646.25

**Billed Time**

Date	Time Keeper	Activity	Time	Rate	Amount
7/07/20		Depositions	3:30	425.00	1,487.50
		<b>Total Time Billed:</b>	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](#)<sup>22</sup> and if you want TXdocs to prepend that to the statement number.

Billing Settings

Billing

- Billing Preferences
- Customize Statements**
- Expense Types
- Document Pricing
- Rate Schedules
- Billing Shortcuts
- Statement Email
- Trust
- LawPay

Customize Statements

Format **Statement Number Style** Messages

☒ Use Statement Number:

Statement Number Format

☐ Number Only ☐ YYYY##### ☐ YYYYMM##### ☒ YYYYMMDD#####

☐ Prepend Client number

Sample: YYYYMMDD123456

Beginning Statement Number:

The statement number when enabled will appear above the aged Receivable.

☒ Save and close ☐ Close

## 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](#)<sup>29</sup> 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:** When adding a new case to TXdocs, you have the option of setting a [Minimum trust balance](#)<sup>35</sup> for the case. When a case is below the minimum, then this message will be printed on the bottom of statements you generate.

Billing Settings

Billing

- Billing Preferences
- Customize Statements**
- Expense Types
- Document Pricing
- Rate Schedules
- Billing Shortcuts
- Statement Email
- Trust
- LawPay

Customize Statements

Format Statement Number Style **Messages**

Statement Message

This is a common statement message

This message will appear at the bottom of all statements

Save and close Close Help

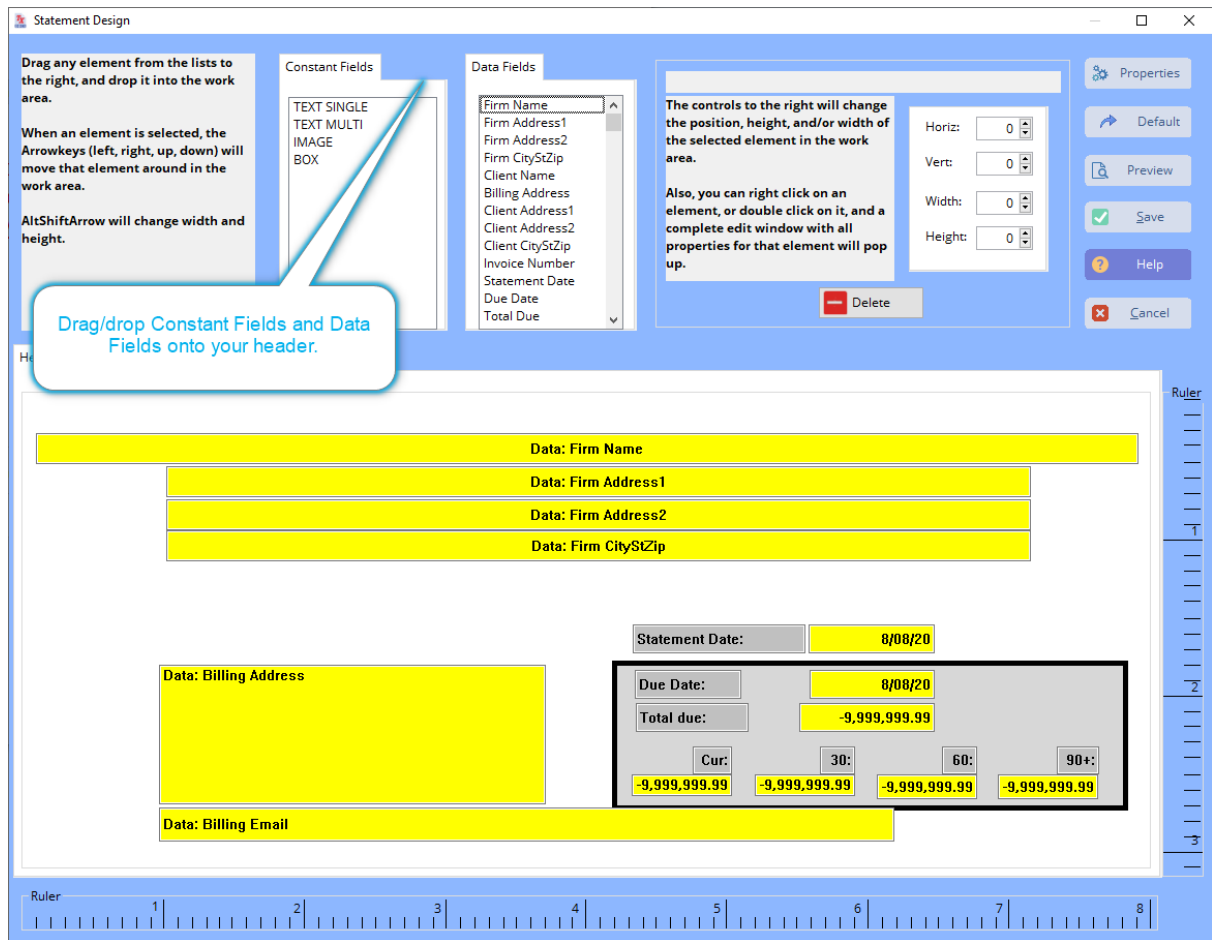


### 3.2.3 Custom Design

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](#)

.



**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

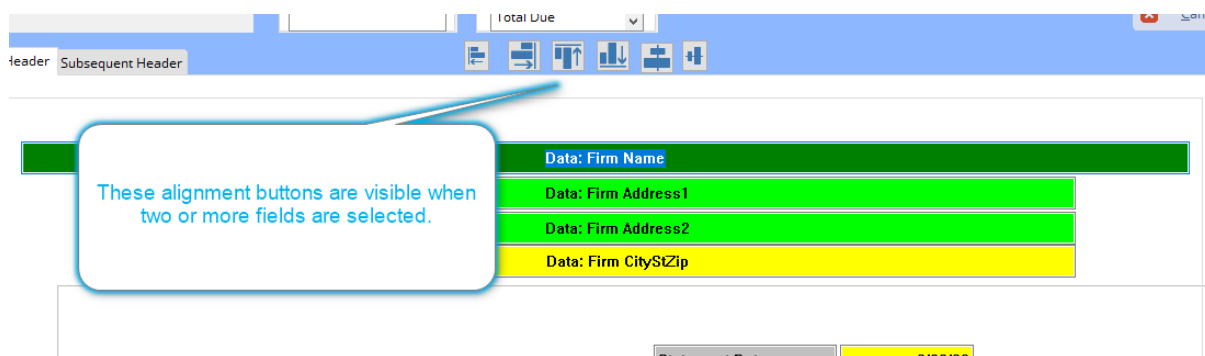
**To move a field:** Select the field and then press an arrow key (left, right, up, down) Alternatively, change the Horiz: or Vert: position in the entry fields at the upper right of the window.

**To change properties (position, 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** (Ctrl+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.

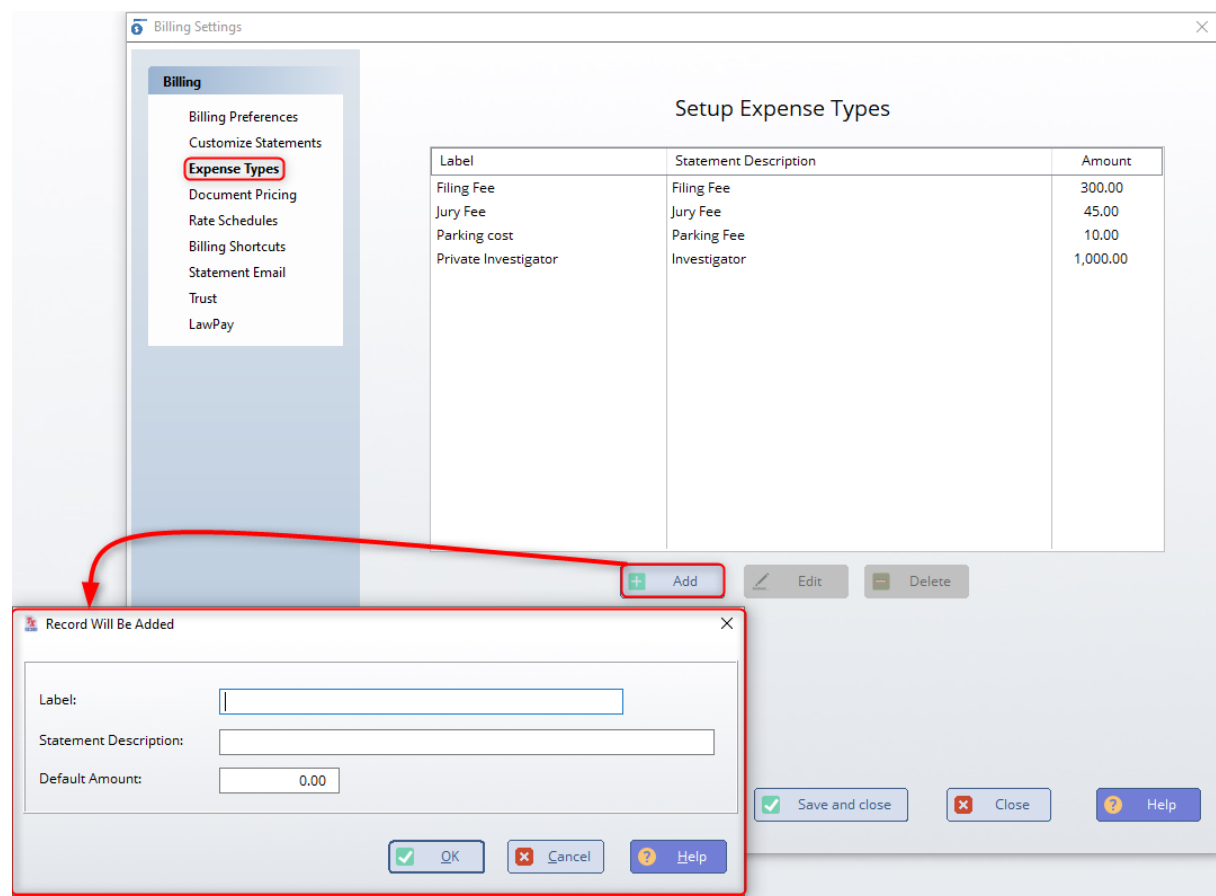
**Moving multiple fields:** After you select multiple fields as described above, you can move all of them at the same time with your arrow keys.

**Aligning multiple fields:** After you select multiple fields as described above, you can align 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.

The screenshot shows the 'Billing Settings' window with a sidebar on the left containing the following menu items: Billing Preferences, Customize Statements, Expense Types, **Document Pricing** (highlighted with a red box), Rate Schedules, Billing Shortcuts, Statement Email, Trust, and LawPay. The main content area is titled 'Setup pricing by document assembled' and contains the following elements:

- A checked checkbox labeled 'Create billing slips as documents are assembled' with a callout bubble stating: 'This checkbox enables automatic Billing'.
- A section titled 'List Assembled Document Options' with two radio button options:
  - ☒ List each document in a separate line item on the bill
  - ☐ List all documents in a single billing itemA callout bubble for this section states: 'How you want the document assembly task described on your statement'.
- An 'Update Document Pricing' button with a pencil icon. A callout bubble for this button states: 'Click to add/edit the prices charged for documents'.
- At the bottom right, three buttons: 'Save and close' (with a green checkmark icon), 'Close' (with a red X icon), and 'Help' (with a question mark icon).

Set Prices for Document Assembly

Practice area: Family Law

by Form Number Alphabetical

Decree, Findings and Agreement

4.01 ☒ Decree of Divorce

4.02 ☐ Findings of Fact and Conclusions of Law - Divorce

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 Marriage

4.07 ☐ Order Waiving Prohibition Against Marriage

4.08 ☐ Statement of Evidence - Divorce

4.09 ☐

4.10 ☐

5.01 ☐

5.02 ☐

5.03 ☐

5.04 ☐

5.05 ☐

5.06 ☐

5.07 ☐

Decree of Divorce

Unselect

New Price: 300.00 Update Price

Close Help

Check 1 or multiple form numbers. The documents selected will appear in the right window.

Enter a price for all documents selected

### 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.

Case Will Be Changed

Description: Sale of property

Case type: (Not specified)

Case ID: 5XsFhrtddNXVHas29vlio2NL8dsk4v

Billing

☐ Hold (do not generate statement)

☐ Pro bono case

☒ Automatically apply funds in trust to balance due on a statement

Trust minimum balance: 0.00

Rate Schedule: None

☐ Add Monthly Fee

None

Acme Widgets Contract Rate

San Antonio Legal Services

OK Cancel Help

Rate schedules are available in this drop list.

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

Record Will Be Added

Rate Description:

☐ Discount Base Rate

Check this box if you want to apply a percentage discount to standard hourly rates instead of specifying a dollar amount for each timekeeper.

Name	Base Rate	Schedule Rate
Alan Schoolcraft	425.00	300.00
Edie Dutton	250.00	125.00
Jordan Schoolcraft	100.00	50.00
Kay Cohen	350.00	175.00

Press Enter, or double click mouse on selected line to edit schedule rate.

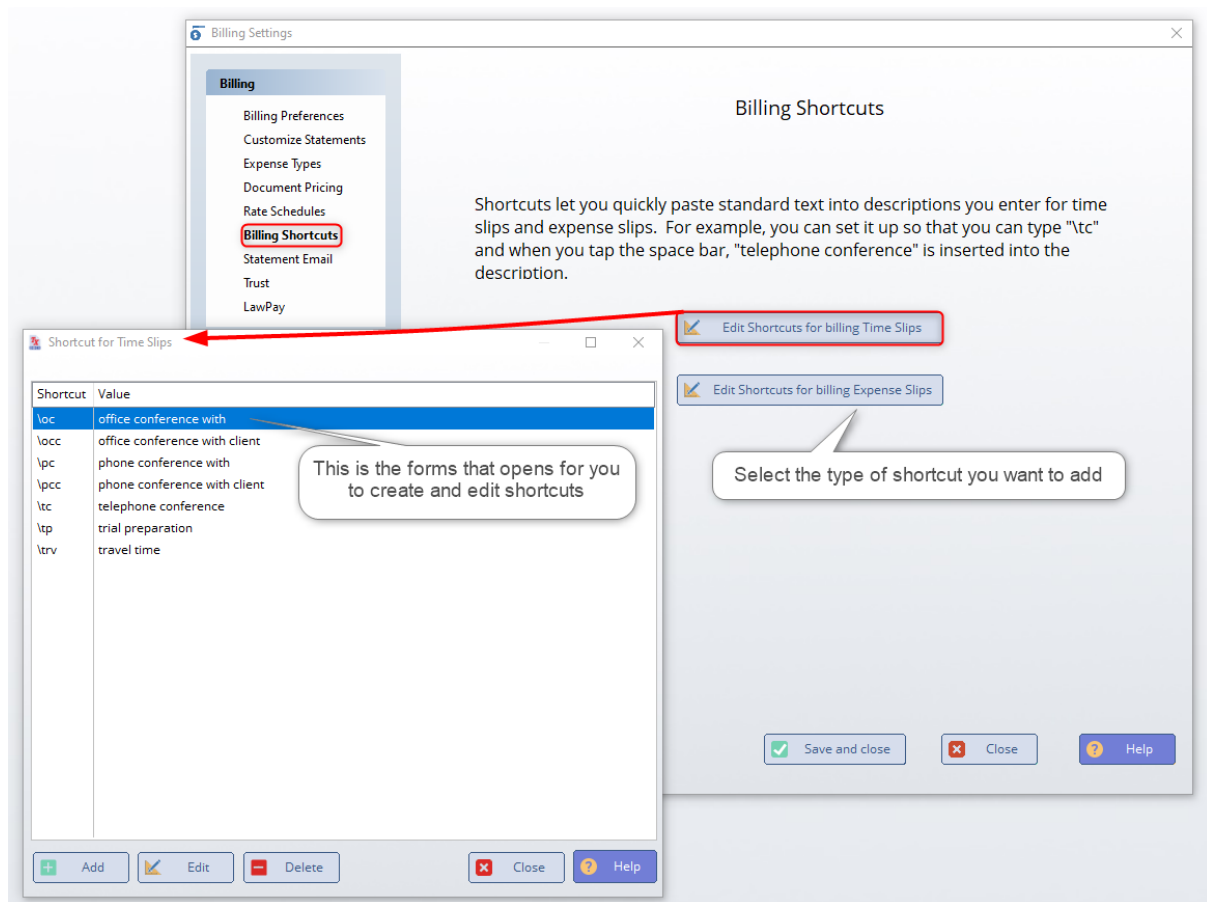
This list includes every timekeeper in your firm. You can specify a different rate for each timekeeper.

☒ Save ☐ Cancel ☐ 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.

**Billing Settings**

**Billing**

- Billing Preferences
- Customize Statements
- Expense Types
- Document Pricing
- Rate Schedules
- Billing Shortcuts
- Statement Email
- Trust**
- LawPay

☒ Automatic application of available trust funds to balance due on statements (default value for new cases)

**Minimum Trust Message**

☒ Include a Minimum Trust Deposit Needed Message if necessary

Your trust account balance is below the required minimum of ~MINTRUST. Please replenish the trust account funds up to ~REPLEVEL. Please make a payment of ~TRUSTDEP.

Use the tokens ~MINTRUST, ~REPLEVEL and ~TRUSTDEP in text to be replaced with min trust balance, replenishment level, and deposit needed.

**Trust Replenishment**

☒ Include auto trust replenishment

Default trust replenishment amount \$  above minimum trust balance

**Trust Deposit Request Text**

Please remit ~leave this -TXdocs fills in amount~ as an initial payment for us to start your case.

Please do not change the text between character "~"

☒ Save and close

This message will be put at the bottom of invocies

You can add a additional trust amount above the required minimum trust amount

### 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.

**Billing Settings**

**Billing**

- Billing Preferences
- Customize Statements
- Expense Types
- Document Pricing
- Rate Schedules
- Billing Shortcuts
- Statement Email
- Trust
- LawPay**

**LawPay Settings**

☒ Use LawPay

**LAWPAY**  
AN AFFINIPAY SOLUTION

I'm using an existing LawPay account

Connect LawPay to TXdocs Disconnect LawPay

I don't have a LawPay account

Sign up for LawPay

It can take one business day for LawPay to accept your new account. Once you have LawPay account please go to this window again and click Connect LawPay to TXdocs button to login.

Select the operating bank account: Bank Account 1 - TEST

Select the trust account: Bank Account 2 - TEST

Email subject: leave empty for LawPay's default subject

Email message: this text will be in the email sent by LawPay

LawPay will send your client an email with this subject and message. The pdf statement will be attached. The email contains a link to LawPay's payment portal.

Extra email addresses that receive the LawPay emails: optional, ; separated

Save and close Close Help

Default text for the subject is "Your AffiniPay Statement"

Default text for the body is "(name of the firm) has sent you a payment request"

**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 paid 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.

Statement Preview

Zoom In Zoom Out Layout

Search

Not a REAL Firm  
404 Pat Booker Rd  
suite 3  
Universal City, TX 78148

Invoice Number: 20211021000200  
Invoice Date: October 21, 2021

Everstar Hadi

Due Date: October 26, 2021

105.00

30: 0.00 60: 0.00 90+: 0.00

TXDocstest@aol.com

CASE: Civil

Page 1 / 1

Clicking the 'Finish' button will finalize these statements.

Output Options

☒ Email Statements ☒ Upload to LawPay ☒ Print Statements

Finish Cancel

When the option Upload to LawPay is checked on Lawpay will send out an email to the client. The Email statement option can be checked on or off. When the upload to lawpay is disabled and email statements is check on TXdocs will send out the email.

**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

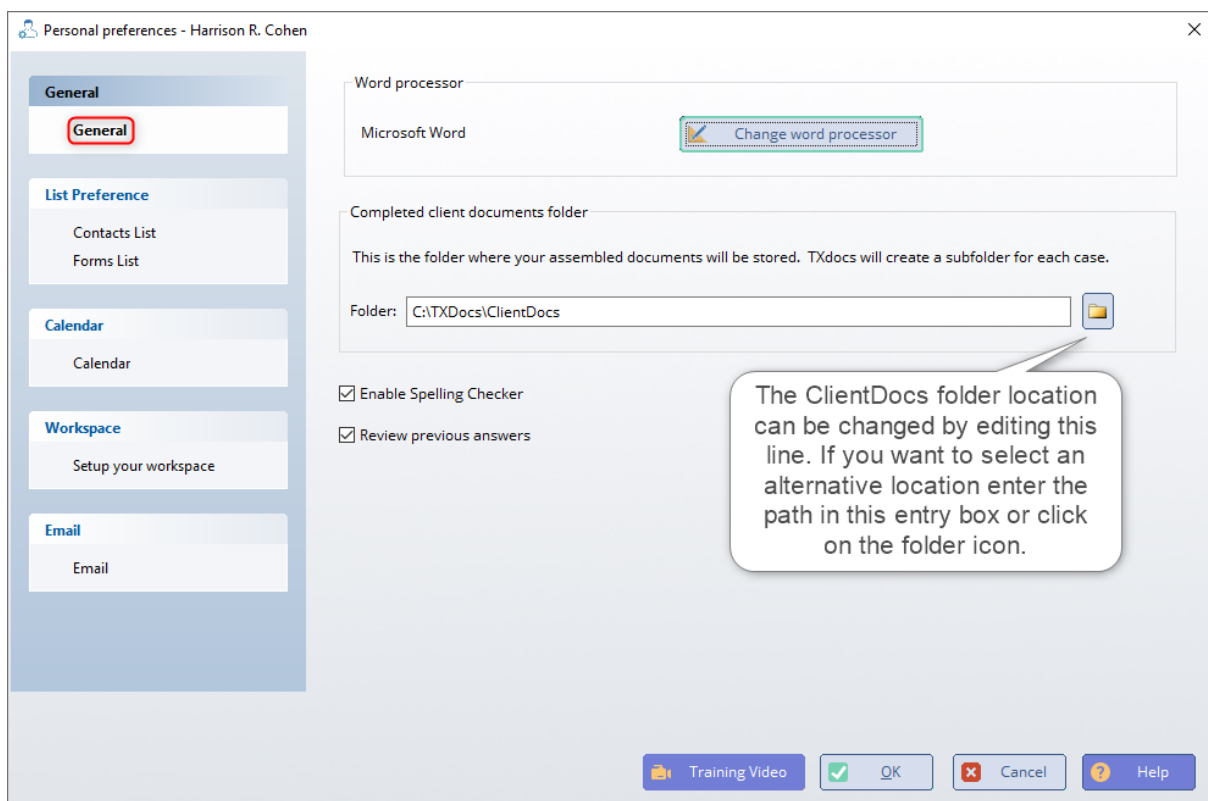
**Word processor:** TXdocs works with Microsoft Word, Corel WordPerfect or the free word processor - OpenOffice. If you are using TXdocs Anywhere (our internet version) you will also be able to choose Word 365. It is important to select the correct word processor because TXdocs makes many formatting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

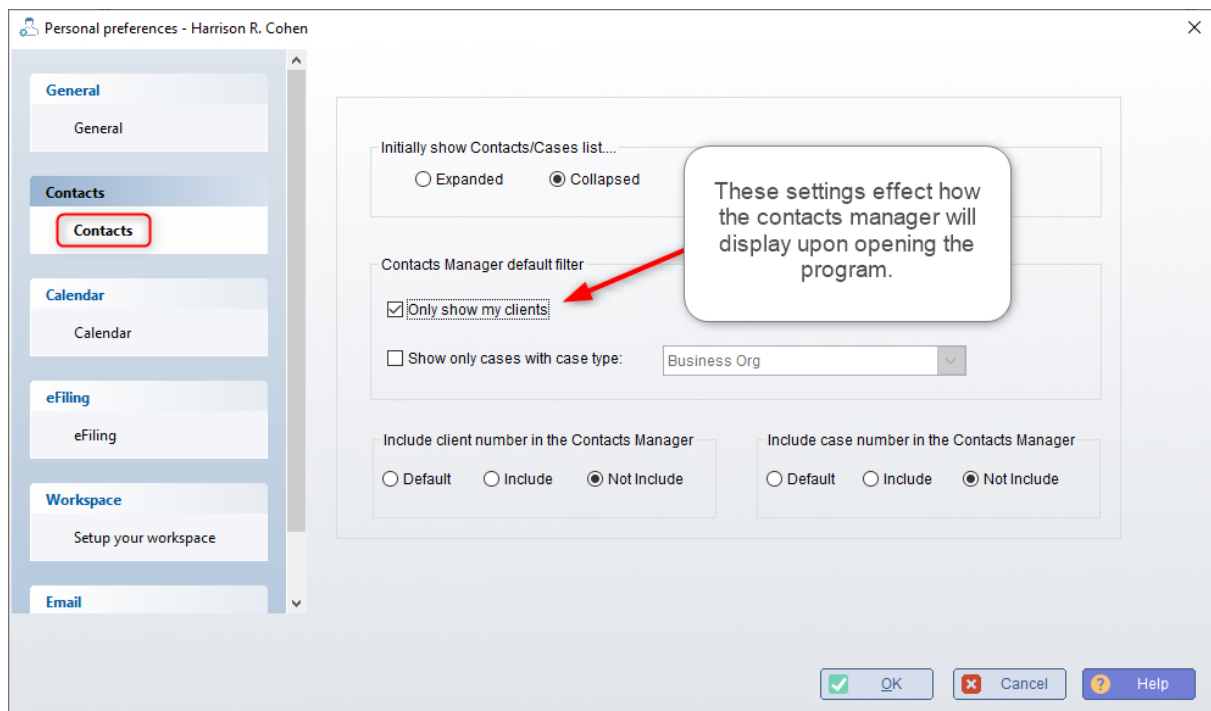
**Initially show Contacts/Cases list....** Your clients and cases are displayed in what is called a tree structure. That is, the clients are displayed on a line and then all of the cases related to that client are shown on indented lines below the client. You can click on a "+" or "-" to show (expand) and hide (collapse) the cases. If you have hundreds or thousands of 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.

Personal preferences - Harrison R. Cohen

**General**

General

**List Preference**

Contacts List  
Forms List

**Calendar**

Calendar

**Workspace**

**Setup your workspace**

**Email**

Email

How to display tasks on today at a glance

☐ Only today

☒ This week

☐ This month

☐ All upcoming

How to display deadlines on today at a glance

☐ Only today

☒ This week

☐ This month

☐ All upcoming

Training Video OK Cancel Help

### 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](#)<sup>[64]</sup>.

**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](#)<sup>[177]</sup> 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.

Personal preferences - Harrison R. Cohen

**General**

General

**List Preference**

Contacts List  
Forms List

**Calendar**

Calendar

**Workspace**

Setup your workspace

**Email**

**Email**

☒ Enable TXdocs and Outlook integration

TXdocsPlus Email Manager will automatically give you access to your Inbox, Sent Items and Trash folders. Here you can select any additional folders you would like to have access to in Email Manager.

Account: support@txdocs.com

Client folder: Client Emails

The client folder will hold subfolders for each client and case. Every email you assign to a case will be moved automatically.

**Managed Outlook folders**

☒ Inbox ☒ Trash ☒ Sent Items

Additional folders to include in Email Manager

- ☐ Bulk Mail
- ☐ Client Emails
- ☐ CompDocFail
- ☐ Data Integrity
- ☐ Deleted
- ☐ Drafts

Training Video OK Cancel Help

## 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.

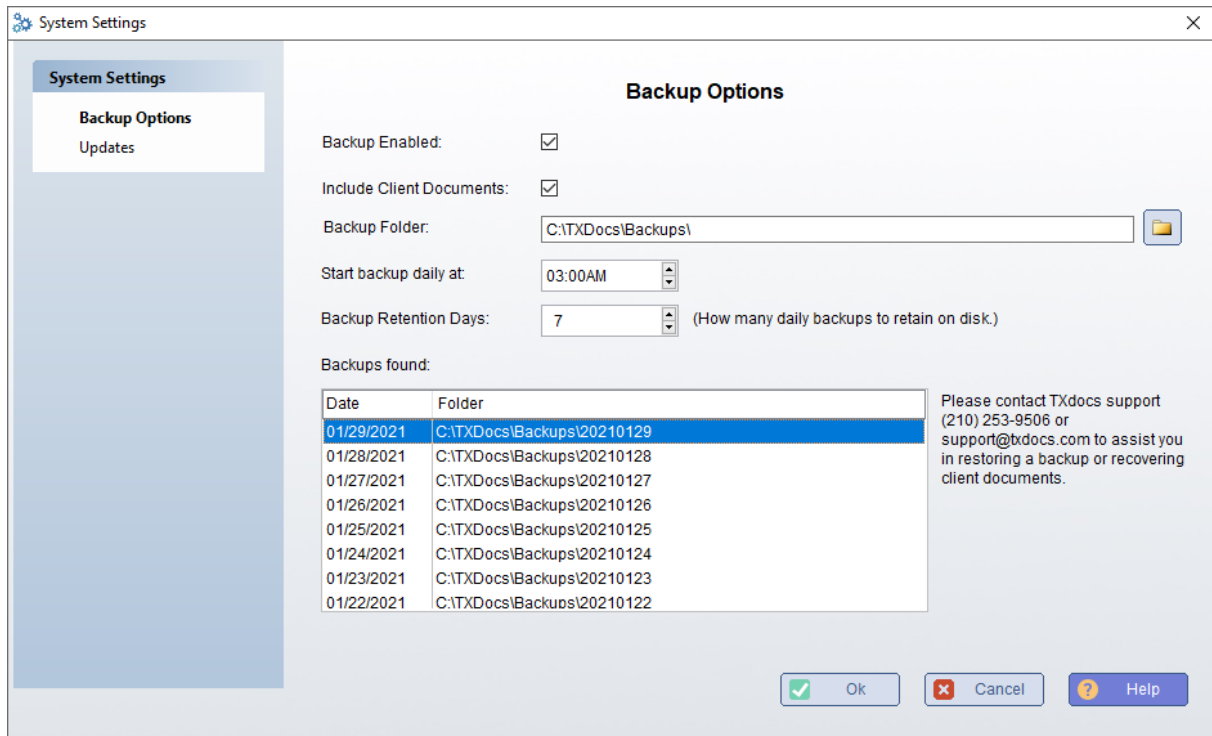
**Backup Folder:** Tell TXdocs where you want your backup files stored.

**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.

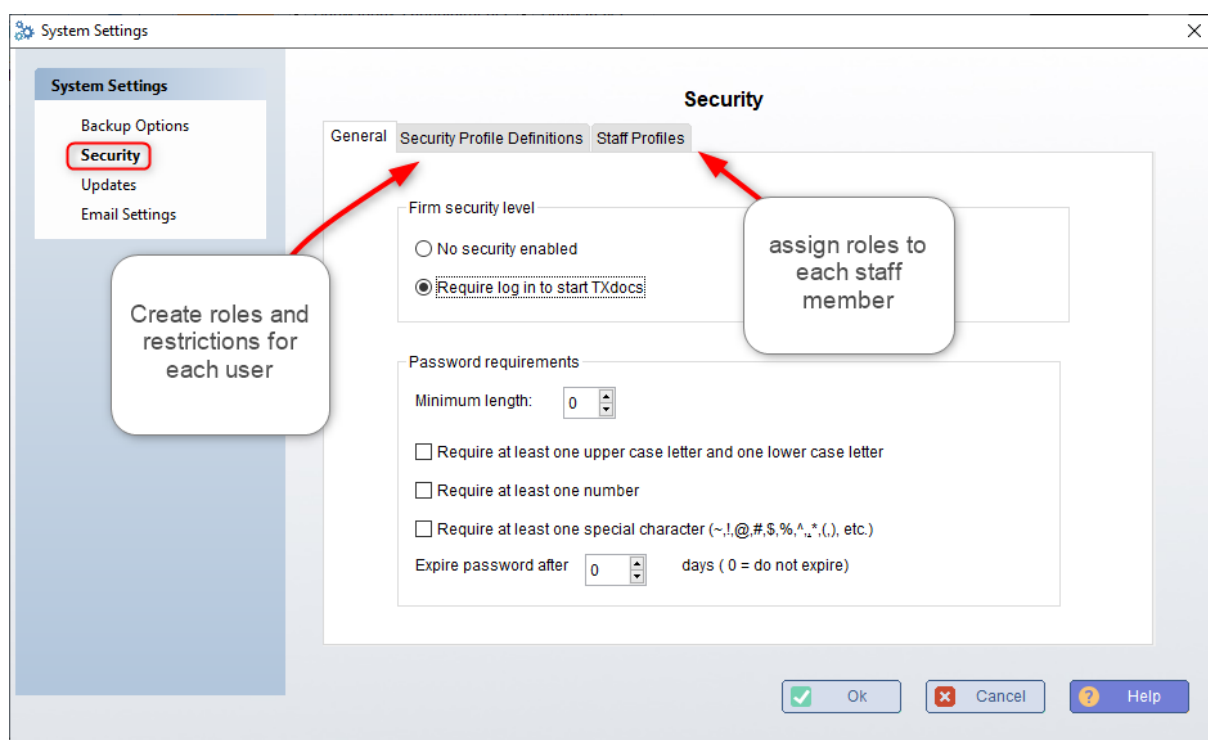
**Security Profile Definitions:** This table lets you add roles for your staff members. You can break up a users roll in 4 sections general features such as allow access to the calendar, case manager, and cws. To edit features, system and firm settings, and lastly billing features.

**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 to 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.

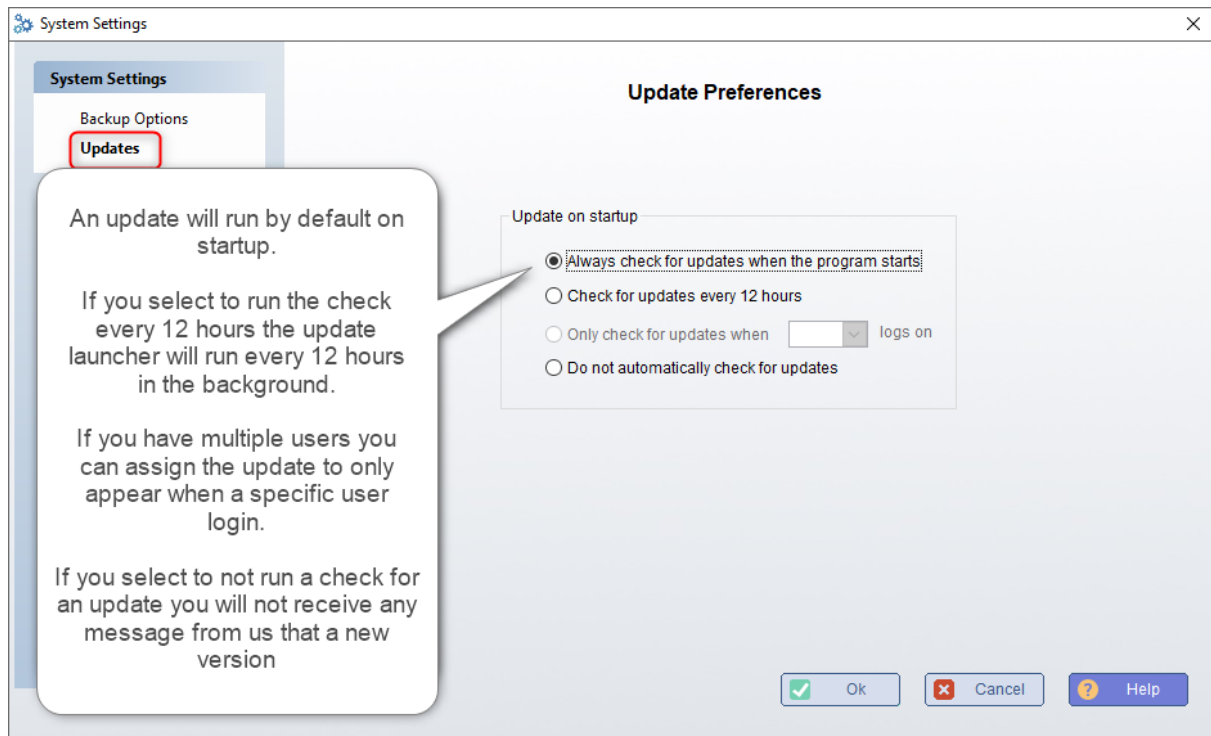
This setting is totally irrelevant to and not available to TXdocs Anywhere (our internet version) subscribers because we update our internet server automatically for you as soon as an update is available.

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**

- Backup Options
- Security
- Updates
- Email Settings**

**Outgoing Email SMTP Settings**

☒ Use SMTP for outgoing Email

From/Reply To Address:

Bcc Address:

SMTP Server:

SMTP Port:  ☐ Use TLS

☐ SMTP Server Requires Authentication

User:

Password:

☒ Ok ☐ Cancel

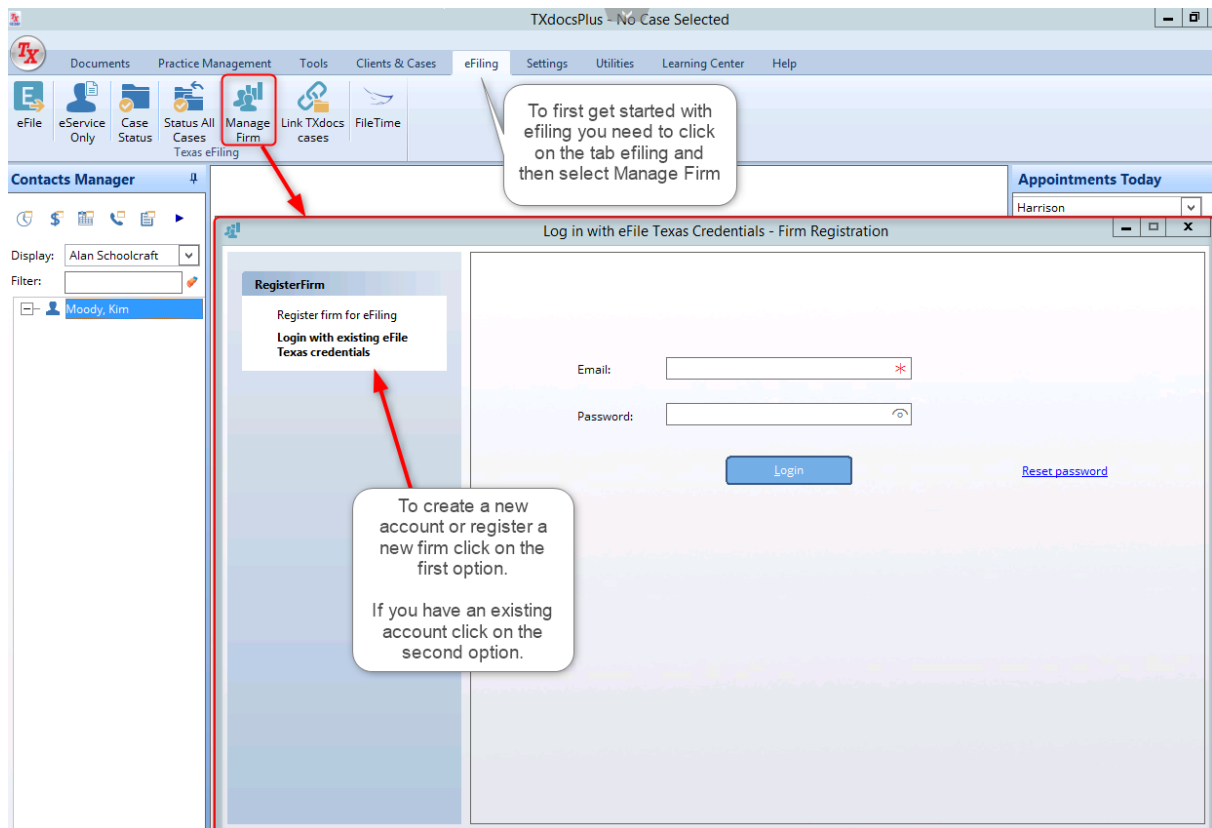
If you are running TXdocs Classic and user outlook locally instead of connecting to the program through smtp. To find those settings go to personal preferences.

# 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.

**RegisterFirm**

**Register firm for eFiling**

Login with existing eFile Texas credentials

If you are already registered with eFile Texas, please log in with your existing credentials.

**Filer Information**

First Name:

Middle Name:

Last Name:

Email Address:

Password:  (8-20 characters with a mix of lower case characters, upper case characters and at least 1 number or symbol)

User Agreement: ☐ [I accept the eFileTexas.gov Service Agreement](#)

[Previous](#) [Submit](#)

After filling in required information an email will be sent to your email address. This email contains a link to activate your efiling account.

Please take time to activate your account then return to TXdocs to continue setting up your efiling system.

## 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

**eFile Firm Management - Firm Information**

**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

Firm Name: Not A Real Firm \*

Country: United States \*

Address Line1: 404 Pat Booker Rd \*

Address Line2:

City: Universall City \*

State: Texas \*

Zip: 78148 \*

Phone: 2102539506 \*

☒ Save Changes

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

TXdocsPlus - No Case Selected

Documents Practice Management Tools Clients & Cases eFiling Settings Utilities Learning Center Help

eFile eService Only Case Status Status All Cases **Manage Firm** Link TXdocs cases FileTime

Contacts Manager Appointments Today

**eFile Firm Management - Users**

**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

**Users**

First Name	Middle Name	Last Name	Email Address
Harrison	R.	C.	Txdocs

When you add a new user they will also be sent an activation email.

Please have them take some time to check their email and click on the activation link. When activated they will also be able to file with TXdocs.

+ Add Edit Delete Resend Activation Email Unlock User

**User Details**

First Name: \*

Middle Name:

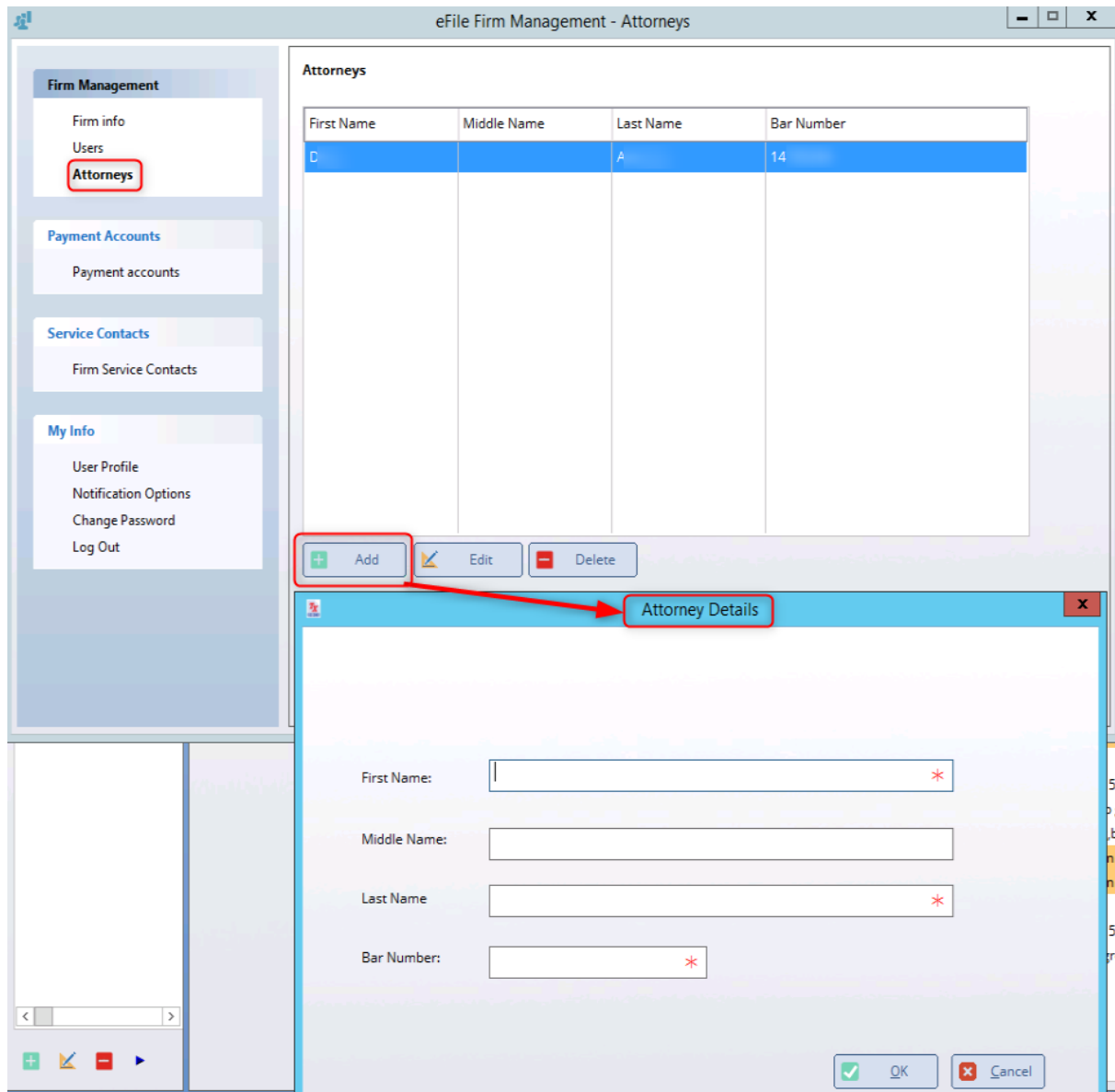
Last Name: \*

Email: \*

☐ Admin ☒ Filer

OK Cancel

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



## Payment accounts

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



**Payment Accounts**

Account Name	Account Type	Card Type	Card Last4	Card Expiry	Status
Master Card Test	CreditCard	MASTERCARD	5454	09/2022	Active

The table above will display a list of all payment and wavier accounts to be used by the firm.

**Payment Information**

**Method of Payment**

☒ Credit Card  
☐ e-Check

**Cardholder Information**  
Enter the information as it appears on the Cardholder Account. The fields marked with a red asterisk (\*) are required fields.

Card Type  \*  
Card Number  \*  
Exp Month  \* Exp Year  \*  
CVV Code  \* [CVV Help](#)  
Name on Card  \*  
Maximum of 30 characters  
Address Type ☒ US ☐ Foreign  
Address Line 1  \*  
Street address, P.O. box, company name, c/o  
Address Line 2  \*  
Apartment, suite, unit, building, floor, etc.  
City  \*  
State  \*  
Zip Code  \*

[Continue](#)

## 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**

**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

use the buttons to add edit or delete any of the service contacts records

Attached Cases

## User Profile

User Profile - Changes the default user settings

eFile Firm Management - UserProfile

**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

First Name: Jane \*

Middle Name: R

Last Name: Doe \*

Email: Txdctest@yahoo.com \*

The user profile shows the original administrator's information. This information can also be found on the Users tab.

☒ Save Changes

Notification Options - This changes our notified settings.

eFile Firm Management - Notification Options

**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

☒ Filing Accepted

☒ Filing Returned

☒ Filing Submitted

☒ Service Undeliverable

☒ Filing Submission Failed

☒ Filing Received

Notification messages will be sent out upon the completion of these steps. Please check off any notification that are unnecessary to your practice.

☒ Save Changes

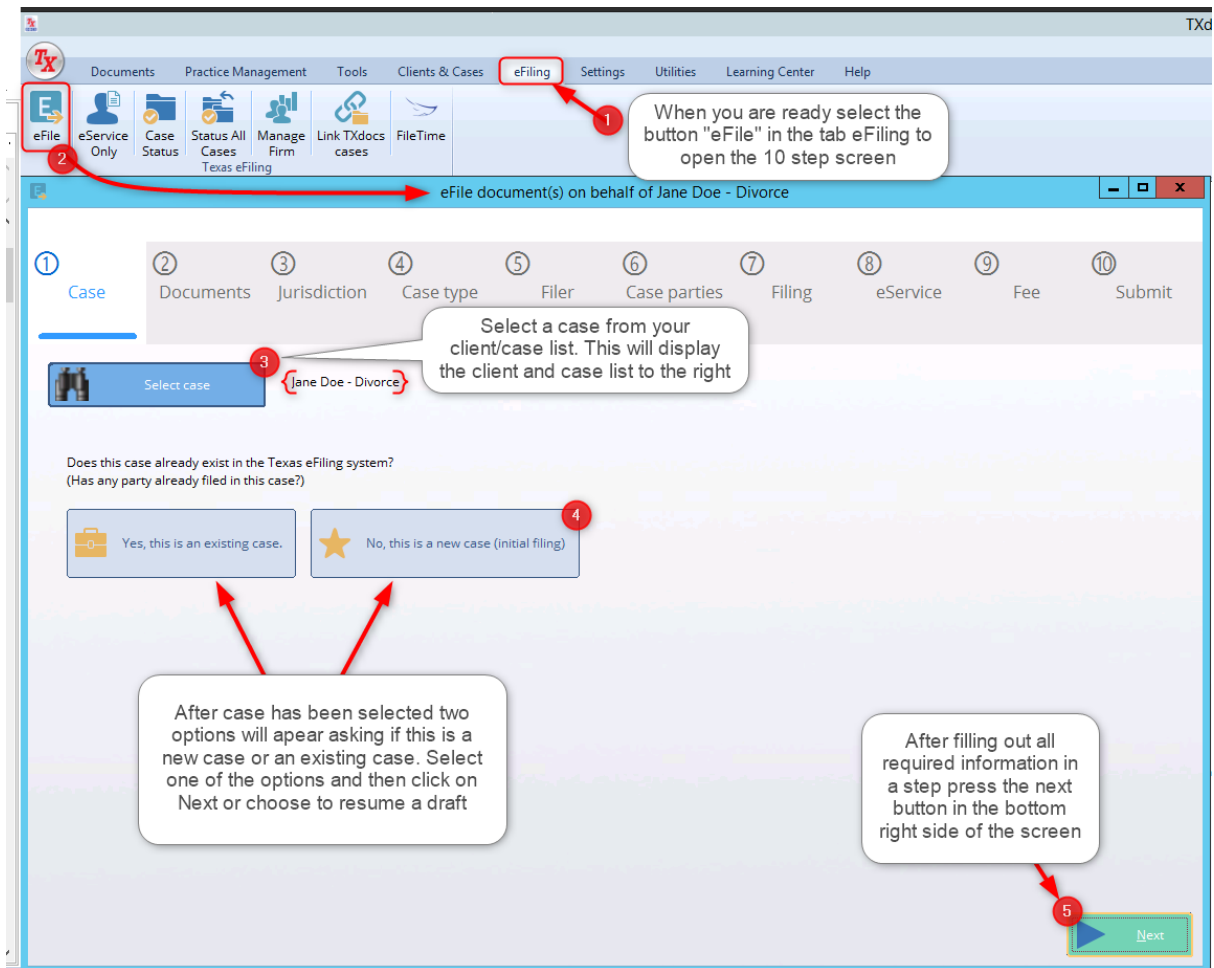
**Change Password** - If you need to change the registered password you can click on this option to insert the old password and then type a new password.

## 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 is 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.

Submit documents to Texas eFiling

1 Case 2 Documents 3 Jurisdiction 4 Case type 5 Filer 6 Case parties 7 Filing 8 E-Service 9 Fee 10 Submit

Pick the document(s) and click the select button. You can also drag the document over.

Documents

respondent's original answer to petition for divorce.doc

Select

Remove lead

Add

Remove

Add order

Remove order

Lead document(s) ?

Lead document #1

Respondent's Original Answer to Petition for Divorce.doc

Add lead document

Attachments

if you need to remove a document select the document from the appropriate list then click remove

Proposed orders

Add other document

Add as lead document

Add as attachment

Add as proposed order

Next

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.

The screenshot shows a web application window titled "Submit documents to Texas eFiling". At the top, there is a progress bar with 10 numbered steps: 1. Case, 2. Documents, 3. Jurisdiction, 4. Case type, 5. Filer, 6. Case parties, 7. Filing, 8. E-Service, 9. Fee, and 10. Submit. Steps 1 and 2 are marked with green checkmarks. Step 3, "Jurisdiction", is currently active and underlined. Below the progress bar, there is a search field with the placeholder text "Enter (part of) the name of the court or county...". A dropdown menu is open, displaying a list of courts and counties. The "12th Court of Appeals" is highlighted in blue. At the bottom of the window, there are two buttons: "Previous" (with a left arrow) and "Next" (with a right arrow).

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.

The screenshot shows the 'Submit documents to Texas eFiling' window. At the top, there is a progress bar with 10 steps: 1. Case, 2. Documents, 3. Jurisdiction, 4. Case type, 5. Filer, 6. Case parties, 7. Filing, 8. E-Service, 9. Fee, and 10. Submit. Steps 1 through 4 are marked with green checkmarks, and Step 4 is highlighted with a blue underline. Step 5, 'Filer', is the current step.

Below the progress bar, there are two search fields. The left search field is labeled 'Category' and has a search bar with the placeholder text 'Enter (part of) the case category...'. Below the search bar is a list of categories: 'Civil - Contract', 'Civil - Injury or Damage', 'Civil - Other Civil', 'Civil - Related to Criminal Matters', 'Probate', 'Probate - Guardianship', and 'Probate - Other'. The 'Civil - Contract' category is selected and highlighted in blue.

The right search field is labeled 'Case type' and has a search bar with the placeholder text 'Enter (part of) the case type...'. Below the search bar is a list of case types: 'Debt/Contract - Debt Collection (182.00)' and 'Debt/Contract - Other (182.00)'. The 'Debt/Contract - Debt Collection (182.00)' case type is selected and highlighted in blue.

At the bottom of the window, there are two buttons: 'Previous' on the left and 'Next' on the right. The 'Next' button is highlighted in green.

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



The screenshot shows a web application window titled "Submit documents to Texas eFiling". At the top, there is a progress bar with 10 steps: 1. Case, 2. Documents, 3. Jurisdiction, 4. Case type, 5. Filer, 6. Case parties, 7. Filing, 8. E-Service, 9. Fee, and 10. Submit. Steps 1 through 5 are marked with green checkmarks, and Step 5 is highlighted with a blue underline. Step 6 is the current step.

Below the progress bar, the form contains the following fields:

- Filing Attorney:** A dropdown menu with "Jane M Doe" selected and a question mark icon to its right.
- Damages sought:** A dropdown menu with a blue bar indicating a selection.
- Procedures / Remedies:** A list box with the following options:
  - ☐ Appeal from Municipal or Justice Court
  - ☐ Arbitration-related
  - ☐ Attachment
  - ☐ Bill of Review
  - ☐ Certiorari
  - ☐ Class Action
  - ☐ Declaratory Judgment

At the bottom of the window, there are two buttons: "Previous" (with a left arrow) and "Next" (with a right arrow).

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.

**Submit documents to Texas eFiling**

Progress: 1 Case ✓, 2 Documents ✓, 3 Jurisdiction ✓, 4 Case type ✓, 5 Filer ✓, 6 Case parties ✓, 7 **Filing**, 8 E-Service, 9 Fee, 10 Submit

**File**  
Petition

Filing code: Petition \$ 0.00 \*

Filing Description:

Add eService to this filing: ☐

Reference Number:

Courtesy Copies:

Filing Comments:

Status	Description (double-click to edit)	Doc type	Security* (double-click to edit)	Uploaded document
	Respondent's Original Answer to Petition for Dismissal	Lead Document	Please select... (double click)	* Uploading...

**Optional services**

Search:

- Issue Citation (\$ 8.00)
- Record Search (\$ 10.00)
- Copies - Certified (\$ 5.00)
- Copies - Non-Certified (\$ 1.00)
- Service - Sheriff - All Other (\$ 90.00)

Step 8. If you didn't choose in step 7 to include an E-service 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.

Submit documents to Texas eFiling

1 Case

2 Documents

3 Jurisdiction

4 Case type

5 Filer

6 Case parties

7 Filing

8 E-Service

9 Fee

10 Submit

Name	Email	Firm Name	Association (double click to edit)

+

 Add existing service contacts

+

 Add new contact

-

 Remove contact from this case

Previous

Select Service Contact

Firm Service Contacts

Public List

Search Public List

First Name:

Last Name:

Firm Name:

Email:

Search

Firm Name	First Name	Middle Name	Last Name	Email Address

Select Contact

Cancel

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.

Submit documents to Texas eFiling

① Case ✓ ② Documents ✓ ③ Jurisdiction ✓ ④ Case type ✓ ⑤ Filer ✓ ⑥ Case parties ✓ ⑦ Filing ✓ ⑧ E-Service ⑨ Fee ⑩ Submit

Party responsible for fees: Sammy, W Tolm \* v

Payment Account: Dumb Account \* v What is this? ?

FEES	
Petition	
Petition	\$ 0.00
Total this filing	\$ 0.00
Total Filing Fees	\$ 0.00
Court Case Fee	\$ 182.00
Convenience Fee	\$ 5.26
<b>Total</b>	<b>\$ 187.26</b>

Previous Next

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.

1

2

3

4

5

6

7

8

9

10

Case

Documents

Jurisdiction

Case type

Filer

Case parties

Filing

E-Service

Fee

Submit

Case Information

Location:

Brooks County - County Clerk

Case Category:

Civil - Contract

Case Type

Debt/Contract - Other (182.00)

Filing attorney:

Jane M Doe

Payment account:

Dumb Account

Parties

Party type	Name	Email
Defendant	Sammy, W Tolm	
Plaintiff	Iren, P Zin	

Filings

Filing Code	Description	Reference	Filing Type
Petition			eFile
	Description	Security	
	Respondent's Original Answer to Petition for Divorce	Does not contain sensitive data	

FEES

Petition	\$ 0.00
Total this filing	\$ 0.00
Total Filing Fees	\$ 0.00
Court Case Fee	\$ 182.00
Convenience Fee	\$ 5.26
<b>Total</b>	<b>\$ 187.26</b>

Submit this filing?

Previous

Submit

## 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.

The screenshot shows the eFiling interface for a divorce case. The top navigation bar includes steps 1 through 10: Case, Documents, Jurisdiction, Case type (highlighted with a blue underline), Filer, Case parties, Filing, eService, Fee, and Submit. Below the navigation bar, there are two search fields: 'Category' and 'Case type'. The 'Category' dropdown shows 'Family - Marriage Relationship' selected. The 'Case type' dropdown shows 'Divorce No Children (295.00)' selected. A red box highlights a dialog box titled 'Save as draft? [NewEfileSubmission]' with the question 'Do you want to save this filing as a draft?' and three buttons: 'Yes', 'No', and 'Cancel'. A red arrow points from the 'Case type' dropdown to the dialog box. At the bottom, there are 'Previous' and 'Next' buttons.

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.

This case has previously saved but incomplete filing drafts.

Show drafts

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 until the filing has been complete or if the button "Remove draft" has been clicked.

eFile document(s) on behalf of Jane Doe - Divorce

- Case
- Documents
- Jurisdiction
- Case type
- Filer
- Case parties
- Filing
- eService
- Fee
- Submit

Select case Jane Doe - Divorce

Initials	Last saved	
HRC	05/17/2021	10:56AM

**Documents**

File name	Type	Folder
Decree of Divorce.DOC	Lead document	\\TSPLUS-HOST-4\TXSubscribers\TX140\shared\ClientDc

**Case Information**

Location: Anderson County - District Clerk  
 Case Category: Family - Marriage Relationship  
 Case Type: Divorce No Children (295.00)  
 Filing attorney:  
 Payment account:

**Parties**

Party type	Name	Email

Resume draft Remove draft Continue without resuming a draft

Next

## 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

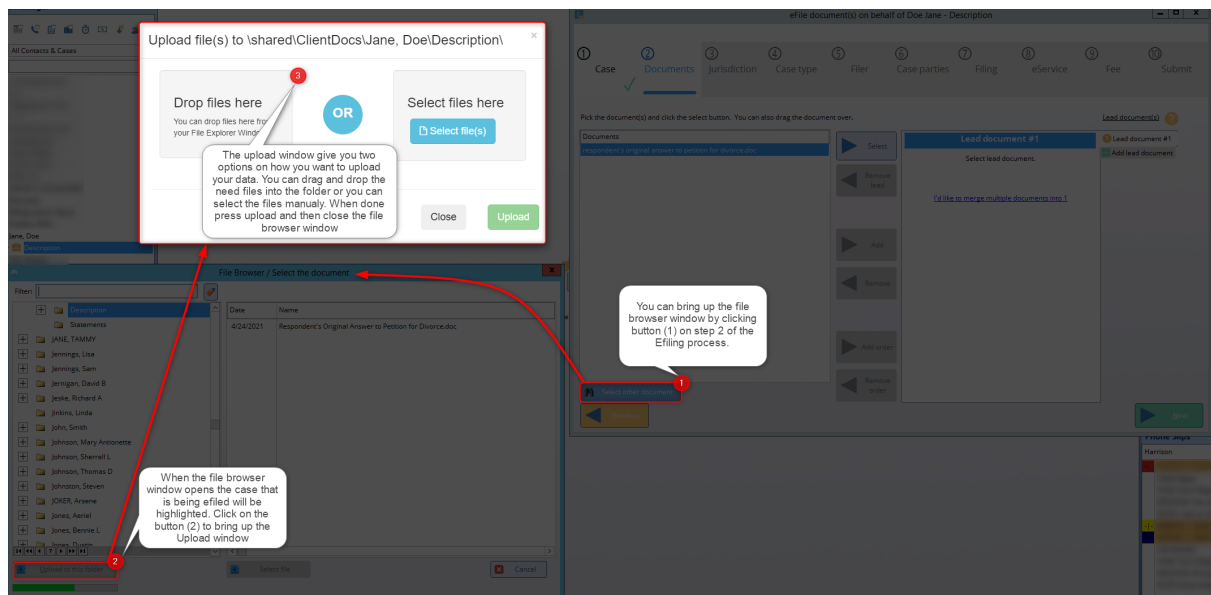
Anywhere is on our secure servers meaning that users looking to download or upload documents from their computer must take steps to transfer data from their machine to our systems.

### 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 efiling 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.

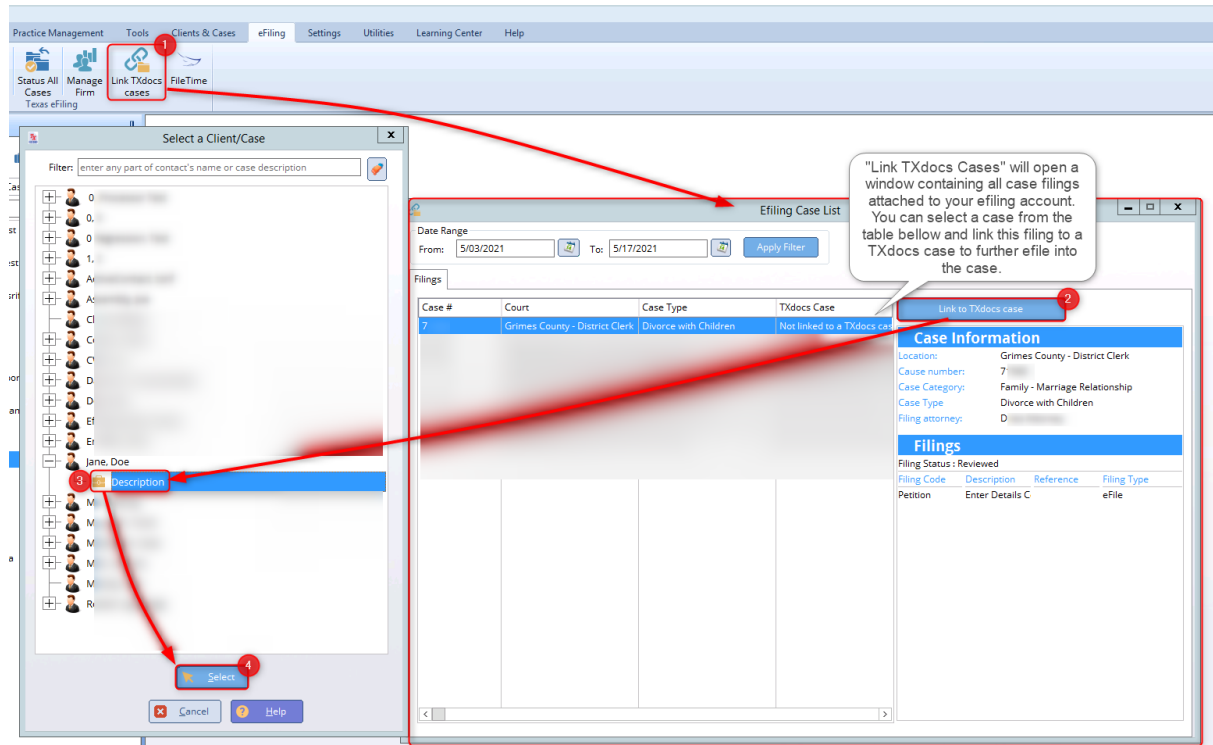


## 4.7 Case Status and Link

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.

The screenshot displays the TXdocs Efiling interface with several callouts explaining its features:

- Date Range:** A callout points to the date range filter (From: 4/06/2020 To: 5/18/2021) with the text: "If you don't see a filing please be sure to change the date range."
- Apply Filter:** A callout points to the "Apply Filter" button with the text: "This will display sent emails."
- Filing History Table:** A callout points to the table with the text: "This will display a pop out window showing the filing's details". The table lists filings with columns for Status, Envelope#, TXdocs case status, and Date.
- Resubmit:** A callout points to the "Resubmit" button with the text: "When a rejected filing has been highlighted an option to resubmit the filing will appear".
- Link to TXdocs case:** A callout points to the "Link to TXdocs case" button with the text: "Just like the link TXdocs case button on the TXdocs home page you can link an outside filing to a case."
- Status for filing:** A callout points to the status column with the text: "Status for filing can be marked as Accepted, Cancelled, Rejected, Reviewed, and Submitted".
- New Filing to this Case:** A callout points to the "New Filing to this Case" button with the text: "This option lets you quickly create an additional filing for a case".
- New eService to this Case:** A callout points to the "New eService to this Case" button with the text: "The selected case will be e-served".
- Cancel Filing:** A callout points to the "Cancel Filing" button with the text: "You can cancel a filing when the filing is just marked as submitted. This will change the status of the case to Cancelled".
- Rejected filing message:** A callout points to the "Filing Status: Rejected" message with the text: "Rejected filing will show a message listing the filing as rejected and any comments from the clerk".

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.

The cases status will be displayed for all filings for the case. If you do not see any items in the case status screen please check if the date range is correct.

When a case has been selected we will load the case data to the right and allow for the filing to be resubmitted or new filings to the case to be created.

If this case has any submissions this tab will be clickable. When selected the case status button will be displayed in the case manager window

**Case Information**

Location: Refugio County - District Clerk  
Cause number: 788544  
Case Category: Family - Marriage Relationship  
Case Type: Divorce No Children (293.00)  
Filing attorney: Dries Attorney

**Parties**

Party type	Name	Email
Petitioner	Oc	
Respondent	Ka	

**Filings**

Filing Status: Accepted

Filing Code	Description	Reference	Filing Type
Petition	Original Petition for Divor		eFile & eService
	<a href="#">Original Petition for Divorce</a>		Security
	<a href="#">Filestamped - Original Petition for Divorce.pdf</a>		Does not contain sensitive data

**Service Recipients**

Name	Email
Do	joh
Pa	an

## 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.

eFile Firm Management - UserProfile

**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

First Name: Jane \*

Middle Name: Q

Last Name: Doe \*

Email: txdocstest@aol.com \*

Save Changes

Click on this option to log out of the program.

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.

Log out? [EFileFirmManagement]

Are you sure you want to log out?

Yes No

# 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 obligation, 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
<input type="checkbox"/>	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

**Child Support Calculator**

Case: Jane Doe - Divorce Select case

Children before the court: 3 Children in other households: 0 Net resources: 5,017.77

Obligor Obligee **Stepdown matrix**

		CHILDREN IN OTHER HOUSEHOLDS							
		0	1	2	3	4	5	6	7
CHILDREN BEFORE THE COURT	1	1,003.55							
	2	1,254.44							
	3	1,505.33							
	4								
	5								
	6								
	7								

Under Sec. 154.128 of the Family Code, child support obligations are supposed to include children in other households the obligor is obligated to support. Use this matrix to select the appropriate amount of child support as each child in this matter emancipates.

The children for whom support is being calculated are shown in the first column (column 0). Each row represents a child involved in this matter. So, if there are only 3 children, there will be only 3 rows of buttons. Other children the obligor has a duty to support (not involved in this matter) are represented by columns 1 through 7. So, if there are 3 children in this matter and obligor has a support obligation for two children in another household, you will find the correct amount of child support on row "3", in the column under "2". If one of the children emancipates and there are still two other children in the other household, the step down amount of support would be in row "2" on the column under "2".

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

<u>Gross Wages</u>	<u>Old Age</u>	<u>Medicare</u>	<u>Federal Income Tax</u>
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:  $241.92 - 229.92 = \underline{12.00}$

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.

$$\begin{array}{r} 3,200 \\ -\underline{3,100} \end{array}$$

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 Obligor](#)s: 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 Obligor 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.

Property Inventory - Jane Doe - Divorce

Community | **Petitioner separate** | Respondent separate | Other property

	Value
<b>ASSETS</b>	
[-] Household Items in Possession of Petitioner	
[-] Miscellaneous Household items	3,600.00
[-] Household Items in Possession of Respondent	
[-] Miscellaneous household items	7,800.00
[-] Motor Vehicles, Boats, Airplanes, etc.	
[-] 2008 Ford Focus	
[-] 2015 Ram 1500	
[-] Real Estate	
[-] Property at Property at 206 Winn Ave	128,000.00
Mineral Interests	
[-] Bank Account	
[-] Checking account # 9879 at Big Bucks Bank	2,895.00
Health Savings Accounts	
Medical Savings Accounts	
Brokerage and Mutual Fund Accounts	
Publicly Traded Stocks and Securities	

(Hint: To Add an item, simply double-click on the category you want.)

#### 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.

Child Support Delinquency Calculator

Setup Audit

Child Support

Client: Alan Schoolcraft  
Case: Divorce

Obligor:   
Obligee:

Calculate interest through  
Report date: 7/24/20

\*Interest will be calculated through the Report date specified above.

Standard report  
Audit report

Date	Description	Obligation	Payment	Payments				Remaining obligation	
				to Interest	to Principal	to Judgments	to Costs	Principal	Accrued Int.
9/01/11	Payment		2,000.00		2,000.00				0.00
10/01/11	Payment		2,000.00		2,000.00				0.00
11/01/11	Payment		2,000.00		2,000.00				0.00
12/01/11	Payment		2,000.00		2,000.00				0.00
1/01/12	Payment		2,000.00		2,000.00				0.00
2/01/12	Payment		2,000.00		2,000.00				0.00
3/01/12	Payment		2,000.00		2,000.00				0.00
4/01/12	Payment		2,000.00		2,000.00				0.00
5/01/12	Payment		2,000.00		2,000.00				0.00
6/01/12	Payment		2,000.00		2,000.00				0.00
7/01/12	Payment		2,000.00		2,000.00				0.00
8/01/12	Payment		2,000.00		2,000.00				0.00
9/01/12	Payment		2,000.00		2,000.00				0.00
10/01/12	Payment		2,000.00		2,000.00				0.00
11/01/12	Payment		2,000.00		2,000.00				0.00
12/01/12	Payment		2,000.00		2,000.00				0.00
1/01/13	Payment		2,000.00		2,000.00				0.00
2/01/13	Payment		2,000.00		2,000.00				0.00
3/01/13	Payment		2,000.00		2,000.00				0.00
4/01/13	Payment		2,000.00		2,000.00				0.00
5/01/13	Payment		2,000.00		2,000.00				0.00

Child Support Payments Judgment Costs Edit Delete

How Delinquent Support is Calculated OK Cancel Help

### 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.

	Amount	Unawarded	Awarded to/Paid by			
			Pet	Resp	Other	Sell
<b>ASSETS</b>						
Household Items in Possession of Petitioner						
Miscellaneous Household items	3,600.00		✓			
Household Items in Possession of Respondent						
Miscellaneous household items	7,800.00			✓		
Motor Vehicles, Boats, Airplanes, etc.						
2008 Ford Focus				✓		
2015 Ram 1500						✓
Real Estate						
Property at Property at 206 Winn Ave	128,000.00		✓			
Mineral Interests						
Bank Account						
Checking account # 9879 at Big Bucks Bank	2,895.00	✗				
Health Savings Accounts						
Medical Savings Accounts						
Brokerage and Mutual Fund Accounts						
Publicly Traded Stocks and Securities						
Publicly Traded Bonds						
Business Interests						

<input checked="" type="radio"/> None <input type="radio"/> Respondent to Petitioner <input type="radio"/> Petitioner to Respondent	
Amount:	0.00

	Assets	Debts
Unawarded:	2,895.00	0.00
To Petitioner:	131,600.00	0.00
To Respondent:	7,800.00	0.00
<b>Total:</b>	<b>142,295.00</b>	<b>0.00</b>

Petitioner:	0.00	
Respondent:	0.00	
<b>Net to Petitioner:</b>	<b>131,600.00</b>	<b>94.4 %</b>
<b>Net to Respondent:</b>	<b>7,800.00</b>	<b>5.6 %</b>

## Creating Alternate Plans

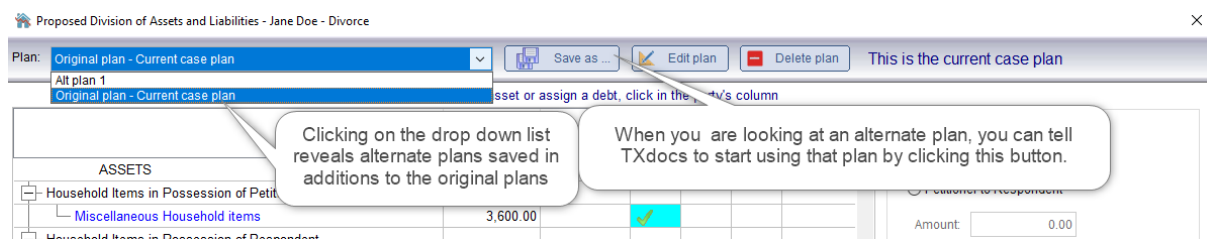
You can create and save alternative proposals for dividing the estate. To create an alternative proposal, click the Save as... button at the top of the screen. Then enter a name for the plan you are working on and

click OK. This creates 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 see 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.

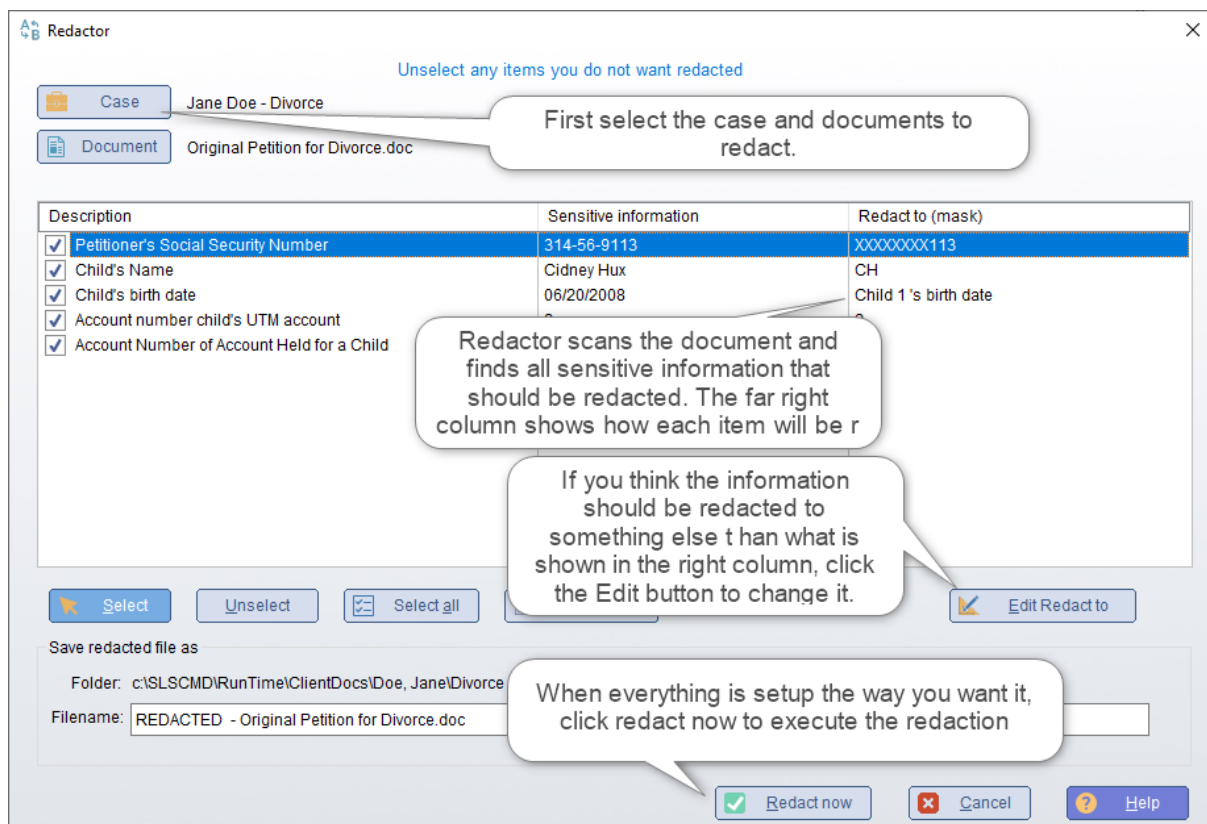
**Select/Unselect/Select all/Unselect all** - initially, all of the listed information will be selected for redaction. If, for any reason, you do not want Redactor to redact a particular answer, you can unselect it. Questions selected for redaction have a green checkmark in the left column.

**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.

 Redactor

The left two columns show you what TXdocs will do unless you customize the entry. "X" represents the sensitive information to be redacted. Any visible "y"s are portions of the answer which will appear in the document. The number "1" is used to show a numbered item. For example, an item that could refer to the first child, second child and third child will appear as "Child 1's name", "Child 2's name", etc.

TXdocs Setting		Your Preference	
Description	Redact To	Skip	Redact To
Respondent's Driver's License Number		<input type="checkbox"/>	yyyAAAAAA
Respondent's Social Security Number		<input type="checkbox"/>	XXXXXXXXXX
Petitioner's Driver's License Number		<input type="checkbox"/>	CCCCCCCCC
Petitioner's Social Security Number		<input type="checkbox"/>	DDDDDDDDDD
Prior full name of child		<input type="checkbox"/>	PRIOR NAME OF THE CHILD1
Patient's Social Security Number		<input type="checkbox"/>	yyyyEEEEEE
Account Number		<input type="checkbox"/>	yFFFFFFFFF
Custodial Account Number	XXXXXXy	<input type="checkbox"/>	
Child's Name		<input type="checkbox"/>	initials
Child's birth date	Child 1 's birth date	<input type="checkbox"/>	
Child's Social Security Number		<input type="checkbox"/>	CHILD 1 's SOCIAL
Child's Driver's License Number		<input type="checkbox"/>	CHILD 1's DRIVERS LICENSE NUMBER
Petitioner's social security number	XXXXXXy	<input type="checkbox"/>	
Respondent's social security number	XXXXXXy	<input type="checkbox"/>	
Petitioner's driver's license number	XXXXXXy	<input type="checkbox"/>	
Respondent's driver's license number	XXXXXXy	<input type="checkbox"/>	

 Edit  Reset  Close  Help

## 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.

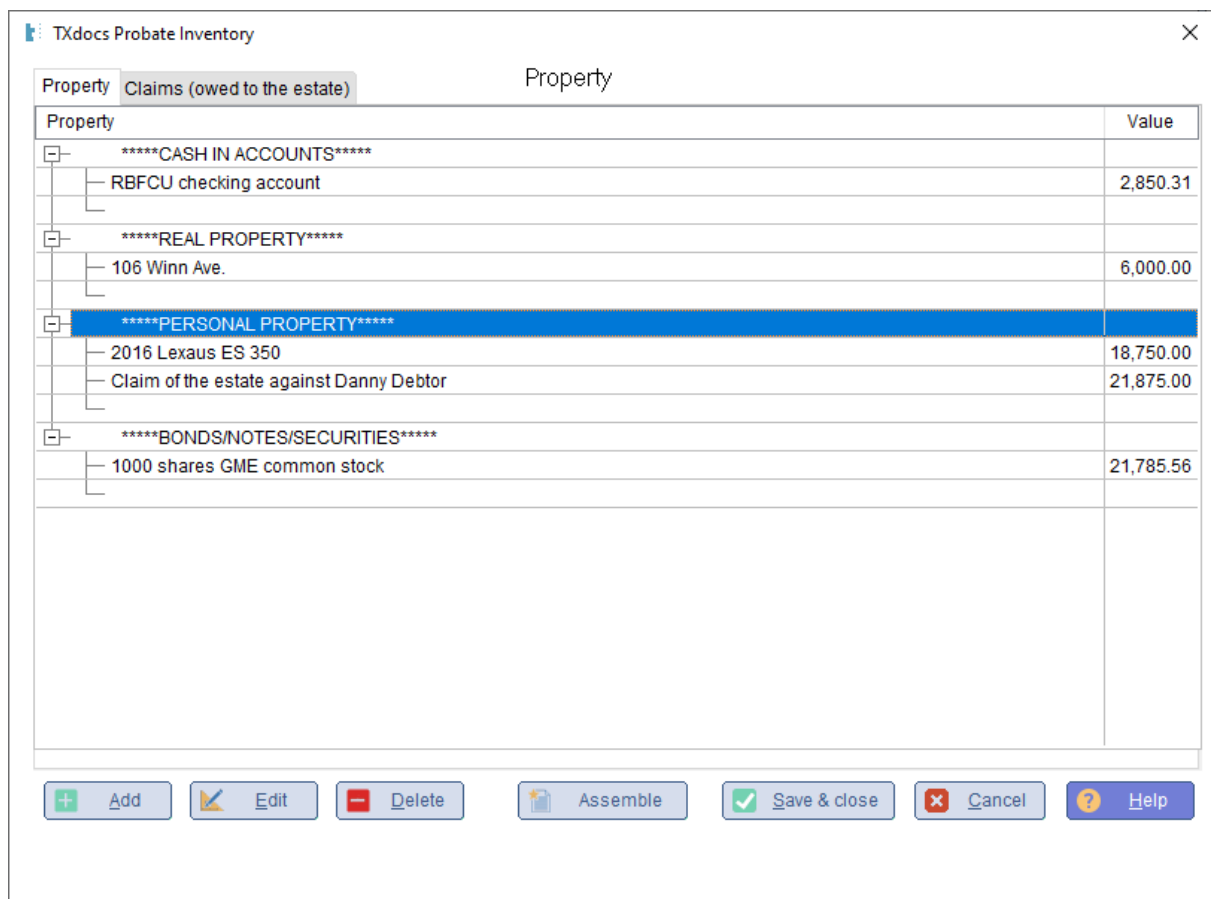
You only need to include property and claims owed to the estate on the inventory so you are provide tabs for each of those categories.

**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



Property	Value
*****CASH IN ACCOUNTS*****	
RBFCU checking account	2,850.31
*****REAL PROPERTY*****	
106 Winn Ave.	6,000.00
*****PERSONAL PROPERTY*****	
2016 Lexaus ES 350	18,750.00
Claim of the estate against Danny Debtor	21,875.00
*****BONDS/NOTES/SECURITIES*****	
1000 shares GME common stock	21,785.56

### 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.

The screenshot shows the 'TXdocs Probate Accounting' window with the 'Setup' tab selected. The 'Annual Account Setup' section contains the following elements:

- This accounting period:** A box with 'Beginning date: 7/14/16' and 'Ending date: 7/09/17'.
- ☐ Check here if you want to include a list of unpaid debts in the Accounting.
- New accounting period:** A box containing the text: 'This option will close out the current accounting period and process data to start a new accounting period.' and 'Do not use this option until you have finished everything and assembled the accounting for the current period.' Below this text is 'Current accounting period: 1' and a button with a green plus icon and the text 'Click here to begin a new accounting period'.

At the bottom of the window are four buttons: 'Assemble', 'Save & close', 'Cancel', and 'Help'.

### 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. 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.

The screenshot shows a software window titled "TXdocs Account For Final Settlement". At the top, there is a tabbed interface with the following tabs: Setup, Receipts, Disbursements, Claims, Property, Distributions/Sales, Debts, Taxes, and Tax returns. The "Setup" tab is currently selected. The main content area is titled "Final Account Setup". It contains the following fields and options:

- A section labeled "This accounting period" with two date input fields: "Beginning date:" (containing "7/14/16") and "Ending date:" (containing "7/09/17").
- A checkbox labeled "Check here if you want to include a list of unpaid debts in the Accounting", which is currently checked.
- A section labeled "How many Annual Accounts have been filed in this cause" with three radio button options: "None", "One" (which is selected), and "More than one".

At the bottom right of the window, there are four buttons: "Assemble" (with a document icon), "Save & close", "Cancel" (with a red X icon), and "Help" (with a question mark icon).

#### 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.

The screenshot shows a software window titled "TXdocs Probate Accounting - Temporary Administration". It has three tabs: "Setup", "Property", and "Sales", with "Setup" currently selected. The main area is titled "Account Setup" and contains a section "Select Optional Items To Include In This Account". Below this, there is a blue text block stating: "While Sec. 452.151 explicitly requires an account to include a list of all property and a return of all sales, the Court can give the administrator additional powers. Select any of the items that were handled by the administrator." Below the text are three checkboxes: "Receipts", "Disbursements", and "Claims". At the bottom of the window are four buttons: "Assemble" (with a folder icon), "Save & close" (with a red X icon), "Cancel" (with a red X icon), and "Help" (with a question mark icon).

## 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

PROPERTY		Value
*****CASH IN ACCOUNTS*****		
Checking #37772733 - at RBFCU		3,883.00
*****REAL PROPERTY*****		
4173 Second Street		24,541.00
*****PERSONAL PROPERTY*****		
2013 Lexus		8,760.00
Claim of the estate against DANNY DEBTOR		1,460.00
*****BONDS/NOTES/SECURITIES*****		

Bottom toolbar: Add, Edit, Delete, Assemble, Save & close, Cancel, Help

### 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. 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.

**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.

The screenshot shows a software window titled "TXdocs Guardianship Accounting" with a close button (X) in the top right corner. Below the title bar is a tabbed interface with the following tabs: Setup, Receipts, Disbursements, Claims, Property, Sales/Dispositions, Debts, Taxes, and Tax returns. The "Setup" tab is currently selected. The main content area is titled "Final Account Setup" and displays "Jane Doe - Divorce" as the case name. Under the heading "This accounting period", there are two input fields: "Beginning date:" with the value "9/15/16" and "Ending date:" with the value "9/14/17". Below this, under the heading "How many Annual Accounts have been filed in this cause", there are three radio button options: "None", "One" (which is selected), and "More than one". At the bottom of the window is a toolbar with four buttons: "Assemble" (with a document icon), "Save & close" (with a red X icon), "Cancel" (with a red X icon), and "Help" (with a question mark icon).

#### 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

TXdocs Guardianship Annual Report - Jane Doe - Divorce

Receipts Disbursements Receipts

This list shows all receipts you currently have in the system for this period. The annual report should include all receipts that were "for: (1) the support and maintenance of the ward; (2) the education of the ward; or the support and maintenance of the ward's dependents".

Click in the box on the left to select/unselect items to include in the report.

Amount	Source	For
<input checked="" type="checkbox"/> 8,760.00	Sale of 2013 Lexus	support of ward
<input checked="" type="checkbox"/> 275.00	GVEC Electric Coop	support of ward
<input checked="" type="checkbox"/> 3,500.00	U.S. Government SSI	support of ward

## 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.

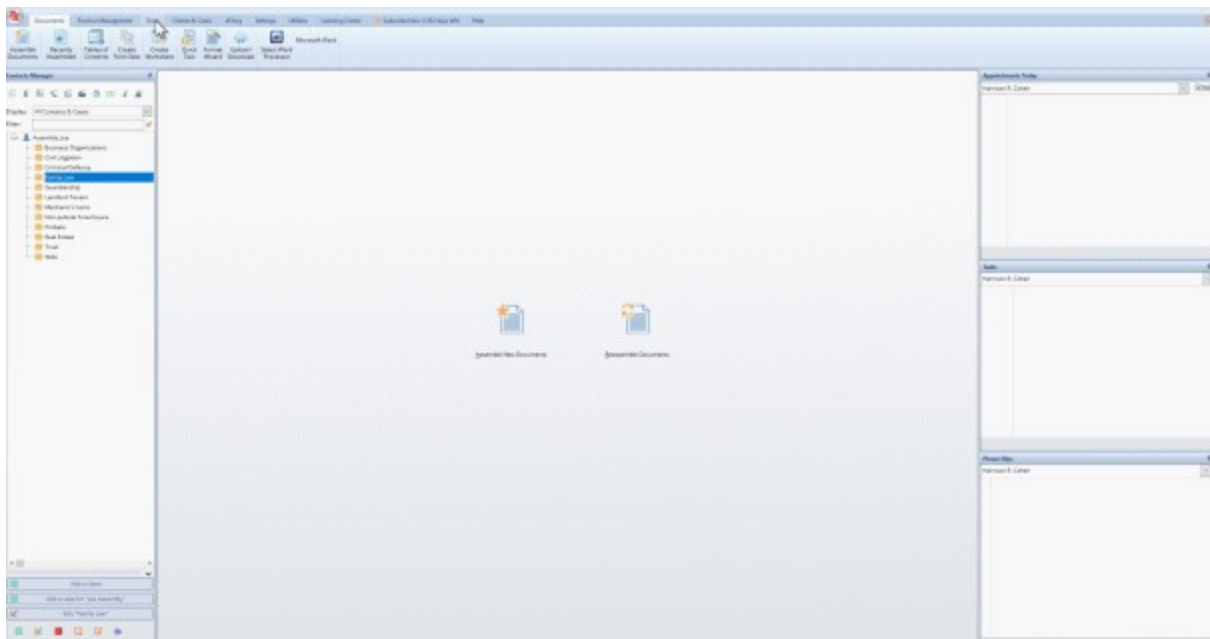
### 5.4.1 WebServicesNew

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.

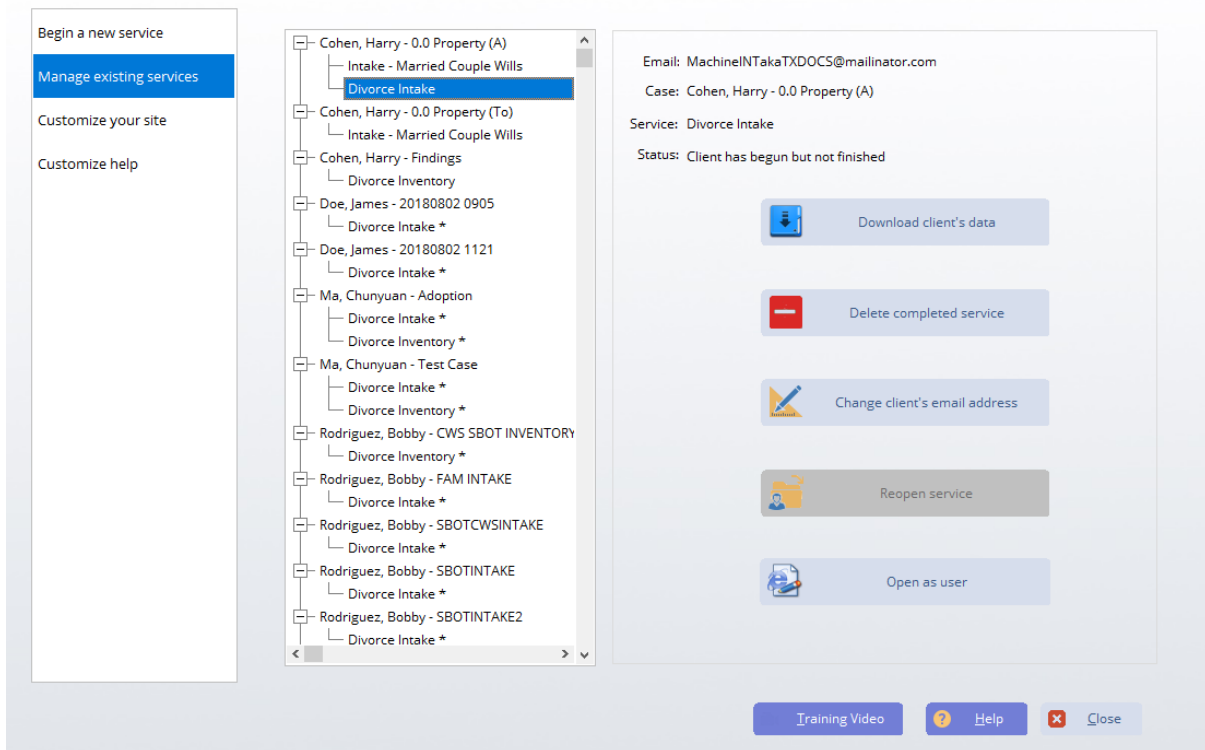
**HINT:** If you enter your clients' email addresses as you add the client to TXdocs, you won't have to enter it again on this screen.



#### 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.

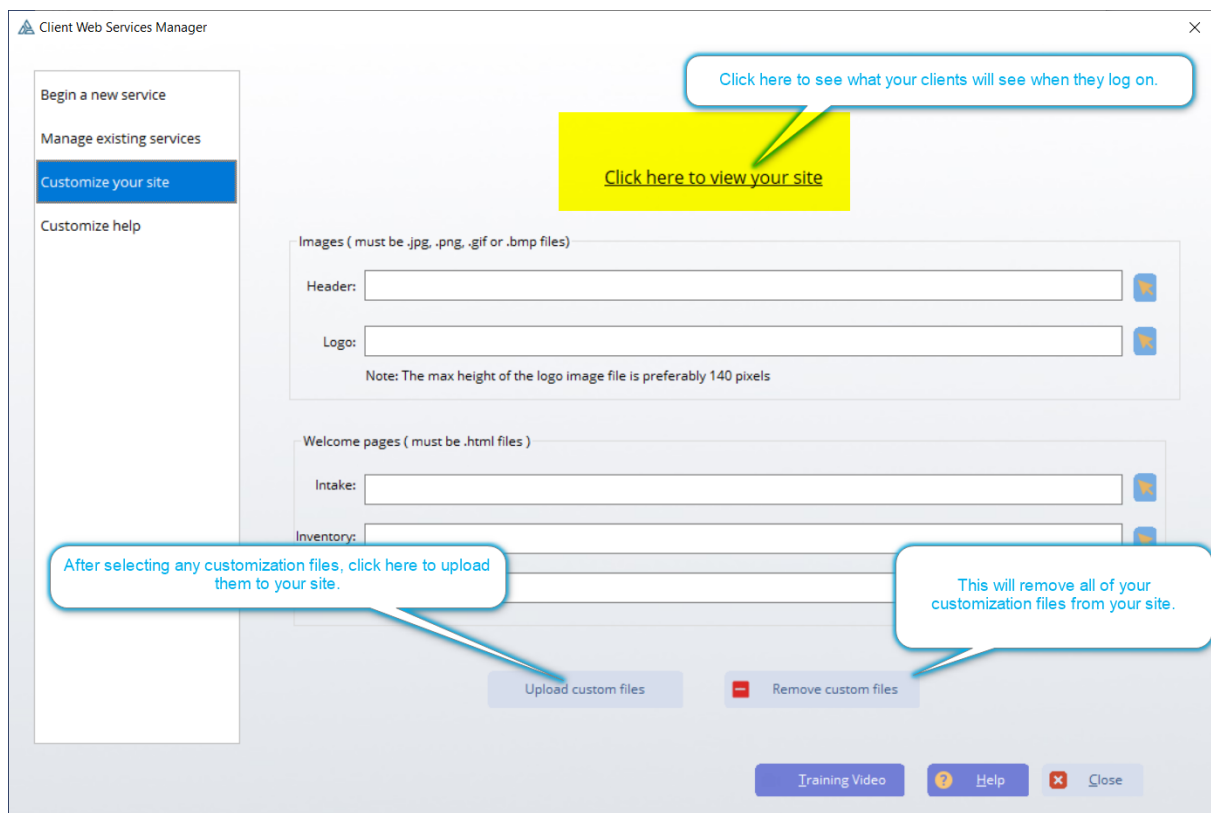
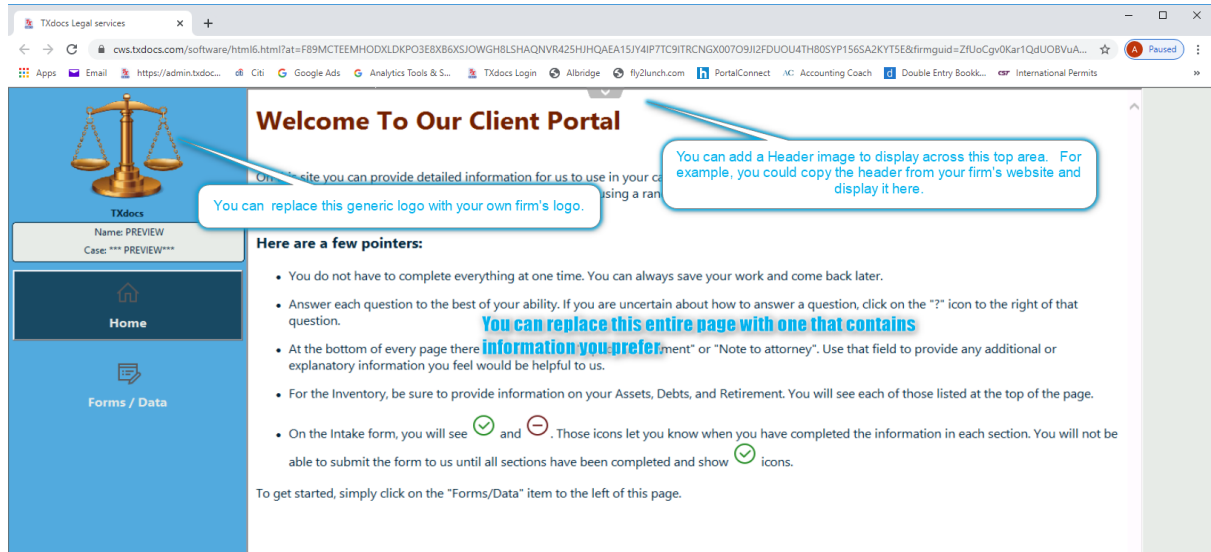
**Reopen service:** After you have downloaded a client's data, the case is closed and your client will not be able to log on the add or change data. This protects you from having them change information without you knowing it. If you decide that you should allow your client to log on and update their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

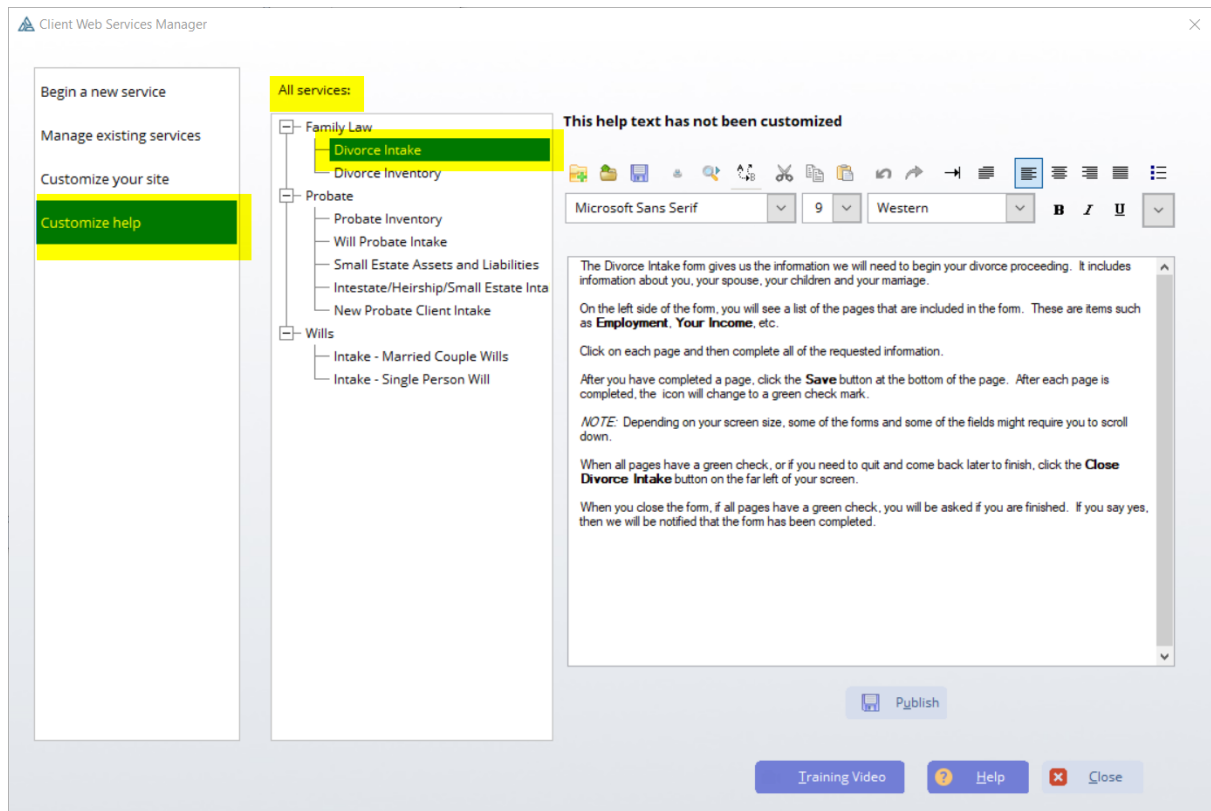
- the files must be .htm or .html format
- the easiest way to create the files is to create them in Word and then Save As - Web Page(\*.htm,\*.html)

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, if 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.

Deadline Calculator

Source: TRCP - Texas Rules of Civil Procedure

Search:

Jump to:  [Add to favorites](#)

- 12 Attorney to Show Authority
- 15 Writs and Process (Standard Answer Filing Deadline)
- 18a(b) Time to File Motion To Recuse
- 21(b) Notice of Hearing (Standard Hearing Notice)
- 38 Third Party Practice
- 77 Lost Records and Papers**
- 87 Motion To Transfer - 45 days notice
- 87 Motion to Transfer - Response
- 99 Issuance and Form of Citation
- 114 Citation By Publication - Answer date
- 116 Service by Publication - first publication
- 117a Citation By Publication in Tax Suits - answer day-
- 117a First Publication - 28 days
- 120a Special Appearance Affidavits
- 122 Constructive Appearance
- 129 How Costs Collected
- 143 Rule for Costs

☐ Use generic calculator

After three days' notice to the adverse party or his attorney, make written sworn motion before the court stating the loss or destruction of such record or papers, accompanied by certified copies of the originals if obtainable, or by substantial copies thereof.

☐ Add 3 days for service by mail (TRCP 21a (c))

Holiday schedule: Anderson

Trigger event: Date of Service

Trigger date: 2/18/21

[Calculate](#)

Sworn motion made no earlier than Tuesday, February 23, 2021

[Save to Deadlines Manager](#)

[Close](#) [Help](#)

## 5.6 Officials 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 in 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.

**Texas Officials**


Office: **County Clerks**


- Anderson
- Andrews
- Angelina
- Aransas
- Archer Co
- Armstrong
- Atascosa
- Austin Co
- Bailey Co
- Bandera
- Bastrop
- Baylor Co
- Bee Court
- Bell County Clerk
- Bexar County Clerk
- Blanco County Clerk
- Borden County Clerk
- Bosque County Clerk**
- Bowie County Clerk
- Brazoria County Clerk
- Brazos County Clerk
- Brewster County Clerk

Phone: (254) 435-2201

Fax: (254) 435-2152



Website: [www.bosquecounty.us](http://www.bosquecounty.us)

Address:  Bosque County Clerk  
P.O. Box 617  
110 South Main, Rm 110  
Meridian, TX 76665

Email:  [county\\_clerk@bosquecounty.us](mailto:county_clerk@bosquecounty.us)

In the list on the left, you can type a letter to jump to the first county whose name begins with that letter. For example, type "G" to jump to Gaines County.

Click the clipboard icon to copy the information to your clipboard. You can then paste that information into a document.

## 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 information for the document you are assembling.

The screenshot shows a software window titled "Certificate of Service". Inside, there are several input fields and buttons. A callout box with a blue border and a white background points to the "Lookup attorney" button. The callout text reads: "While assembling documents, you can select an attorney in your list by clicking the Lookup button." The "Lookup attorney" button is a blue button with a white icon of a person and the text "Lookup attorney". Other elements in the window include: a "Service on:" section with radio buttons for "attorney" (selected) and "party"; a "Type of service:" dropdown menu showing "electronic filing manager"; "Person served:", "Address:", and "Email address:" text input fields; a "Fax number:" field with a placeholder "(000) 000-0000"; and "OK" and "Cancel" buttons at the bottom right.

Certificate of Service

Service on: ☒ attorney ☐ party

Type of service: electronic filing manager ▼

Person served:  **Lookup attorney**

Address:

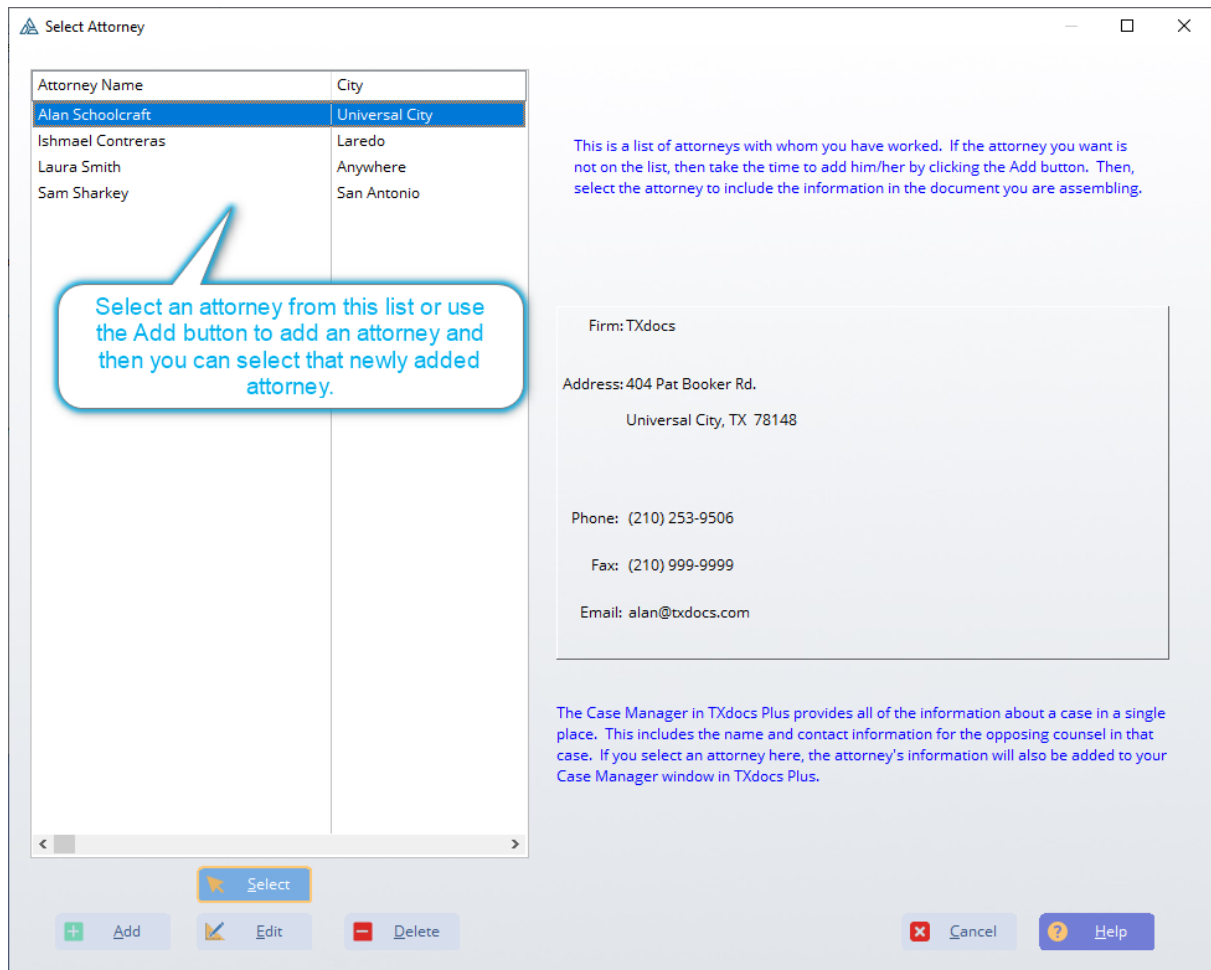
Email address:

Fax number: (000) 000-0000

OK Cancel

While assembling documents, you can select an attorney in your list by clicking the Lookup button.

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

Education Code

Human Resources Code

Parks and Wildlife Code

Texas Rules of Evidence

Alcoholic Beverage Code

Election Code

Insurance - Not Codified

Penal Code

Transportation Code

Auxiliary Water Laws

Estates Code

Insurance Code

Property Code

Utilities Code

Business and Commerce Code

Family Code

Labor Code

Special District Local Laws

Water Code

Business Organizations Code

Finance Code

Local Government Code

Tax Code

Civil Practice and Remedies Code

Government Code

Natural Resources Code

Texas Constitution

Code of Criminal Procedure

Health and Safety Code

Occupations Code

Texas Rules of Civil Procedure

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



The screenshot shows the 'Search Texas codes' interface for 'Finance Code'. A 'Bookmarks' button is highlighted in the top right corner. A callout bubble points to it with the text: 'Click here to see the list of bookmarked favorites'. Another callout bubble points to a 'Copy' icon next to section 11.104 with the text: 'Click here to copy the section to your clip board.' A third callout bubble points to a 'Bookmark' icon next to section 11.105 with the text: 'Click here to bookmark this section as a favorite'.

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- 11.108 SUNSET PROVISION.
- 11.109 STANDARDS OF CONDUCT.
- 11.110 TRAINING.
- 11.111 SEPARATION OF FUNCTIONS.
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**11.104 EXPENSES AND COMPENSATION OF MEMBERS.**

A member of the finance commission is entitled to:

- (1) the reimbursement for reasonable and necessary expenses incidental to travel incurred in connection with the performance of official duties; and
- (2) a per diem for each day that the member is absent from more than half of the regularly scheduled finance commission meetings that the member is eligible to attend during a calendar year without an excuse approved by a majority vote of the finance commission.

**11.105 MATTER IN WHICH MEMBER HAS PERSONAL INTEREST.**

A member of the finance commission may not act or participate in the portion of a commission meeting during which the matter considered specifically relates to an entity:

- (1) of which the member or the member's spouse is an officer, director, stockholder, shareholder, or owner; or
- (2) in which the member or the member's spouse has another financial interest.

**11.106 MEETINGS.**

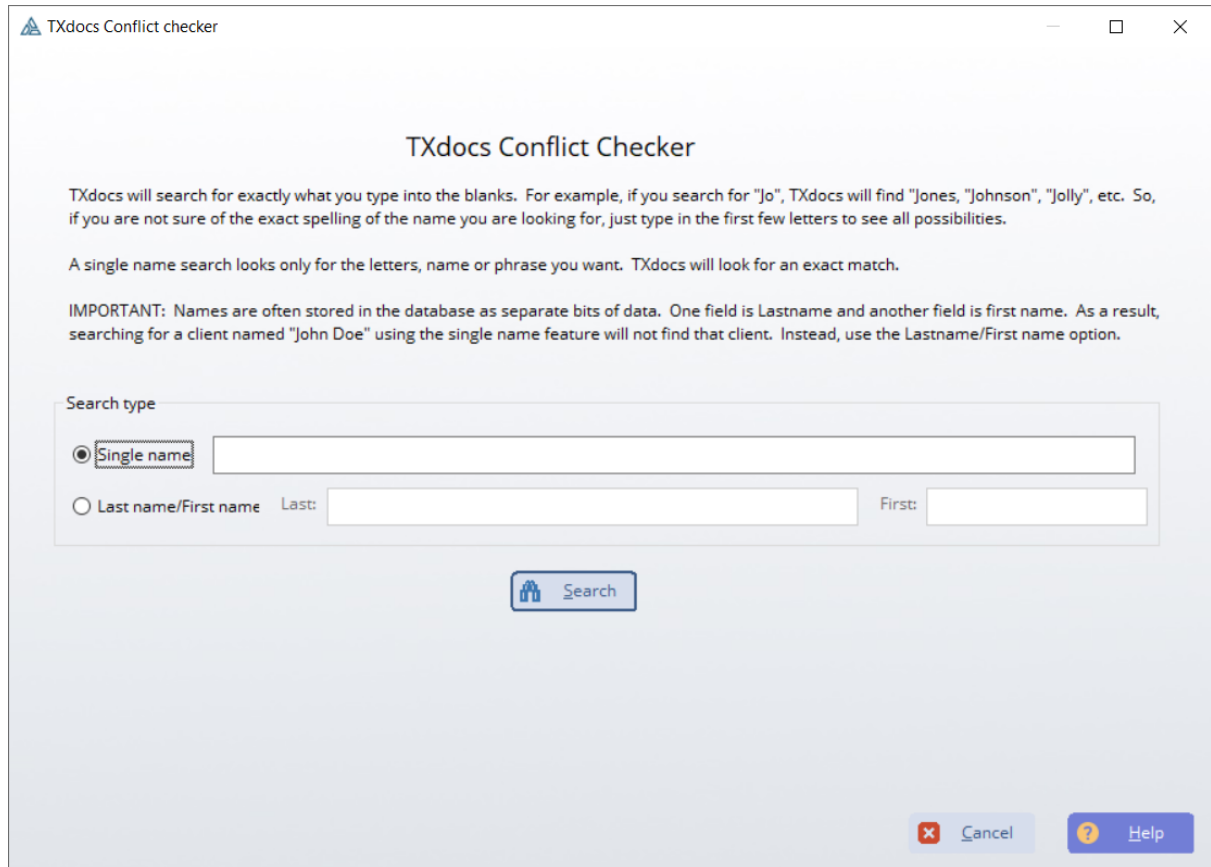
- (a) The finance commission shall hold at least six regular public meetings during each calendar year on dates set by the commission.
- (b) The presiding officer or three members of the finance commission may call a special public meeting of the commission.

## 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.



The image shows a software window titled "TXdocs Conflict checker". Inside the window, the title "TXdocs Conflict Checker" is centered. Below the title, there is explanatory text: "TXdocs will search for exactly what you type into the blanks. For example, if you search for 'Jo', TXdocs will find 'Jones', 'Johnson', 'Jolly', etc. So, if you are not sure of the exact spelling of the name you are looking for, just type in the first few letters to see all possibilities." This is followed by another line of text: "A single name search looks only for the letters, name or phrase you want. TXdocs will look for an exact match." Then, an "IMPORTANT:" note states: "Names are often stored in the database as separate bits of data. One field is Lastname and another field is first name. As a result, searching for a client named 'John Doe' using the single name feature will not find that client. Instead, use the Lastname/First name option." Below this text is a "Search type" section with two radio button options. The first option, "Single name", is selected and has a text input field next to it. The second option, "Last name/First name", is unselected and has two text input fields labeled "Last:" and "First:". Below the search type section is a "Search" button with a magnifying glass icon. At the bottom right of the window are "Cancel" and "Help" buttons.

TXdocs Conflict checker

### TXdocs Conflict Checker

TXdocs will search for exactly what you type into the blanks. For example, if you search for "Jo", TXdocs will find "Jones", "Johnson", "Jolly", etc. So, if you are not sure of the exact spelling of the name you are looking for, just type in the first few letters to see all possibilities.


A single name search looks only for the letters, name or phrase you want. TXdocs will look for an exact match.



**IMPORTANT:** Names are often stored in the database as separate bits of data. One field is Lastname and another field is first name. As a result, searching for a client named "John Doe" using the single name feature will not find that client. Instead, use the Lastname/First name option.

Search type

☒ Single name

☐ Last name/First name Last:  First:

 Search

 Cancel  Help

# 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](#)

Format For Assembled Documents

### Create Beautiful Documents in TXdocs

This window provides just a sample of the options now available to you through our Document Format Wizard. Find the Document Format Wizard under the "Documents" tab on the TXdocs main menu.

All documents

Select Font Font Size: 12 Font Name: Times New Roman

Pleadings

Line spacing: 1.50 Alignment: Left

☐ Show page numbering for all pleadings (Page # Of #)

(NOTE: Use the Document Format Wizard to create custom footers and headers)

Letters

Line spacing: 1.08 Alignment: Left

Letterhead: ☒ None ☐ Text file ☐ Image file

This setting can tell TXdocs to insert a letterhead at the top of all letters you generate in TXdocs.

[more information](#)

OK Help

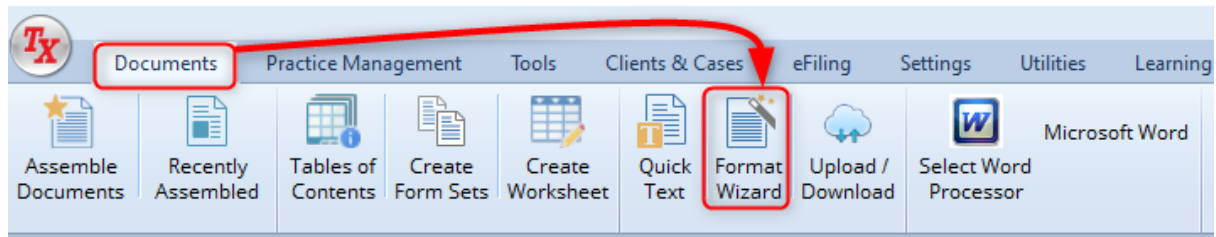
You can change our default fonts from times new roman

Add page numbers to pleadings, but not page numbers to agreements, a header for you letters

### 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.

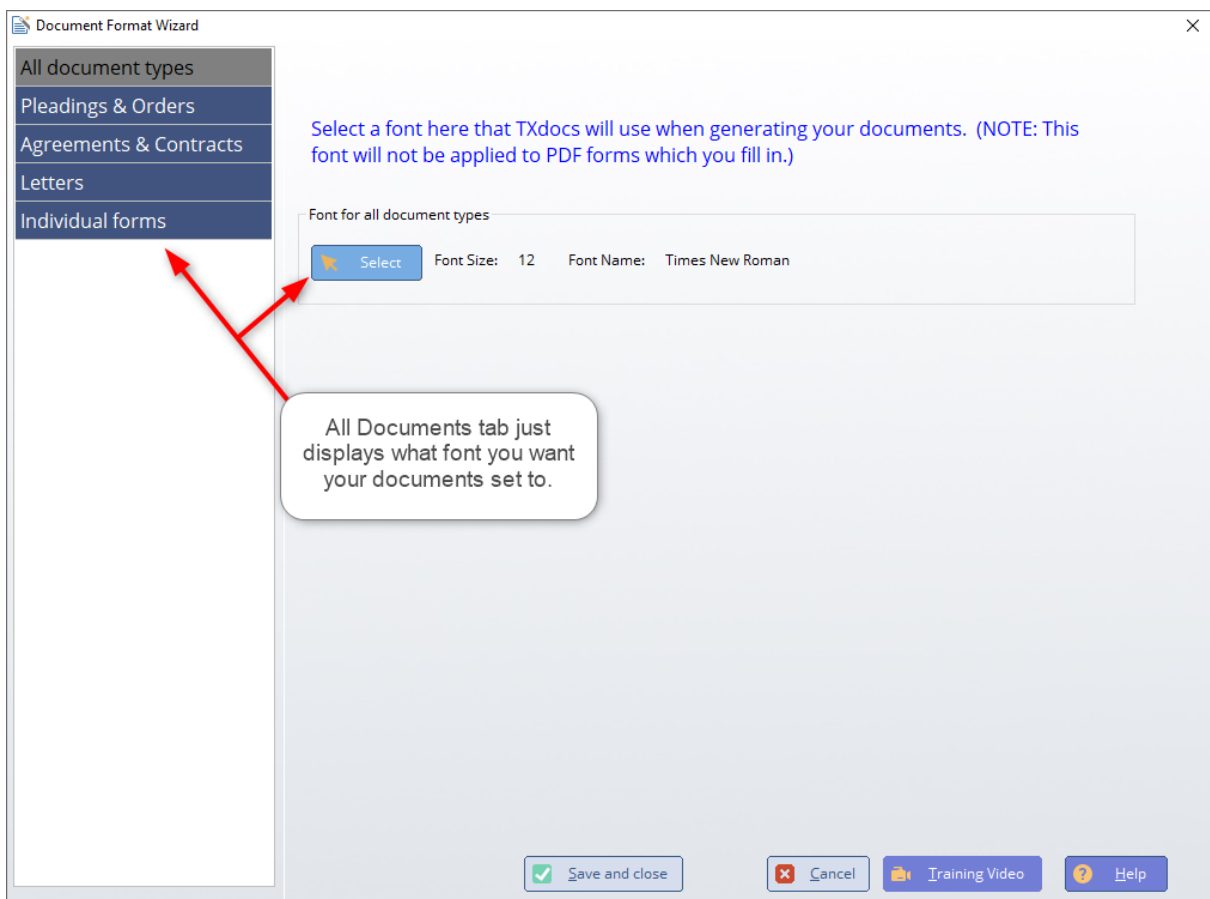
The settings you make in this window generally apply to all documents of the particular type. For example, when you make a selection for bolding the captions in Pleadings, that selection applies to all pleadings you assemble. BUT - you can override this selection in the Individual Forms section of this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

Document Format Wizard

All document types  
Pleadings & Orders  
Margins  
Footers & Headers  
Caption  
Title  
Body  
Section Heading  
Subheading  
Dispositive  
Indented Paragraphs  
Signature Blocks  
Warnings  
Agreements & Contracts  
Letters  
Individual forms

Headers/Footers have 3 sections. Left aligned text will appear at the left margin of the header/footer, centered text appears centered in the header/footer and right aligned text appears at the right margin. You can use one, two or three of the sections in the same header.

Headers

Left aligned:

Centered:

Right aligned:

You can setup Headers and Footers in this section. If you have word perfect then we recomend clicking on the checkbox for table positioning.

Click to insert a special character into the header

Page#	Today ie: 01/01/15	Your initials	Form title	Cause Number
Total pages	Today ie: January 1, 2015	Your name	Client Name	Case Description

Footers

Left aligned:

Centered:

Right aligned:

Click to insert a special character into the footer

Page#	Today ie: 01/01/15	Your initials	Form title	Cause Number
Total pages	Today ie: January 1, 2015	Your name	Client Name	Case Description

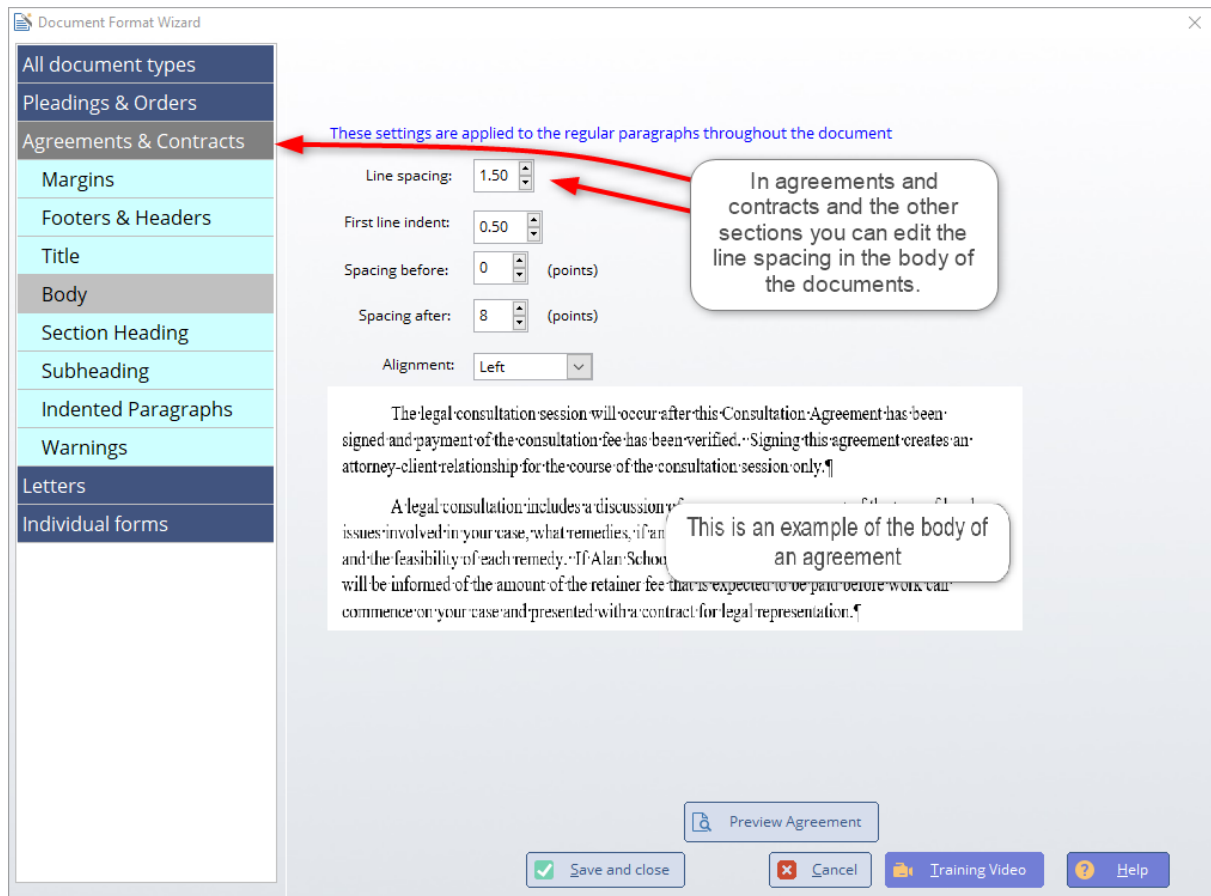
☐ Use alignment instead of a table for positioning.

[Preview Pleading](#)

☒ Save and close  [Training Video](#) [Help](#)

## Agreements & Contracts

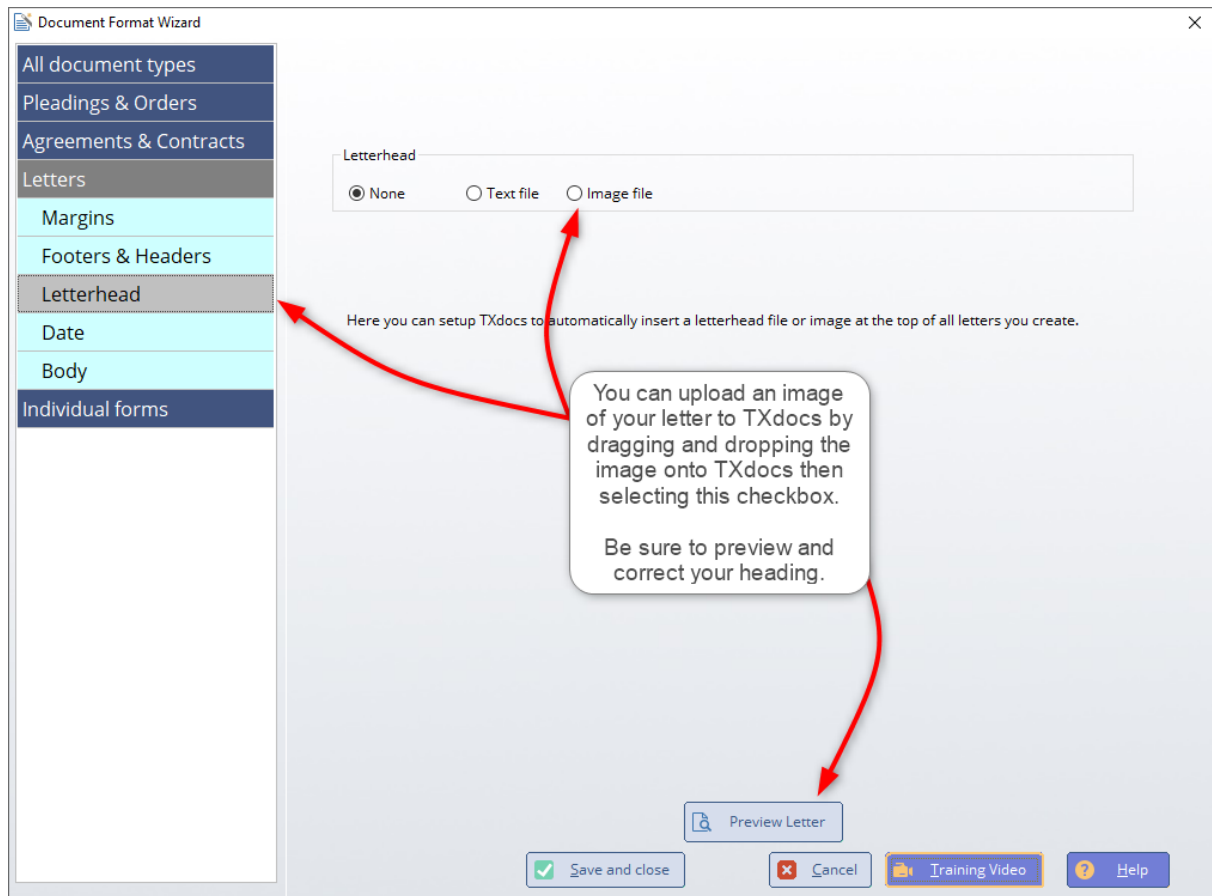
Click this option to set preferences for headers and footers, margins, etc. that you want applied to all agreements and contracts that you assemble.



## 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

1

Select forms

Practice Area

Form Title

Already Formatted

Select Forms

Practice area: Family Law

Filter: search form's title

Advanced Search

Topic: All

by Form Number

Alphabetical

Local forms

2

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 Divor

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

3

OK

Cancel

You can set the formatting to be diffrent from other forms.

Cancel

Training Video

Help

# 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

The screenshot displays the TXdocsPlus Practice Management software interface. The main title bar shows the active case: "Jane Doe - Divorce". The interface includes a menu bar with options like Documents, Practice Management, Tools, Clients & Cases, eFiling, Settings, Utilities, Learning Center, and Help. Below the menu bar is a toolbar with icons for Calendar, Case Manager, Phone Slips Manager, Email Manager, Task Manager, Deadlines Manager, and Billing Manager. The left sidebar contains a "Contacts Manager" section with a list of contacts and a "Divorce" case. A context menu is open over the "Divorce" case, showing options like "Assemble documents", "Case manager", "Billing manager", "Time slip", "Expense slip", "Task", "Appointment", "Email", "Post a comment", "Delete case - Jane Doe - Divorce", "Close case - Jane Doe - Divorce", "Expand all", and "Collapse all". The "Time slip" option is highlighted. The main window displays the "Time slip for - Jane Doe - Divorce" form. The form includes fields for 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), and a TOTAL section. The form also has buttons for Copy, OK, Cancel, and Help. A callout box points to the "Time slip" option in the context menu, stating: "Doe, Jane - Divorce" is the active Client/Case. Another callout box points to the "Case" field in the form, stating: 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. A third callout box points to the main title bar, stating: The selected case will be displayed on the main title bar. The bottom status bar shows TXdocs support contact information, the TX4999 code, and a "Switch to..." button.

TXdocsPlus - ACTIVE CASE: Jane Doe - Divorce

The selected case will be displayed on the main title bar

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

"Doe, Jane - Divorce" is the active Client/Case

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.

The screenshot shows a dialog box titled "Payment for - Jane Doe - Divorce". It contains the following fields and callouts:

- Case Selection:** A box containing "Jane Doe - Divorce". A callout points to it: "To change the case, click on this box or select a different case in the contact manager".
- Date:** A text field with "2/18/2021" and a calendar icon.
- Amount:** A text field with "0.00".
- Type:** A dropdown menu with "Check" selected. A callout points to the dropdown: "A receipt will be automatically generated if you select this box".
- Note:** A text area with a callout: "A note is optional. Some people put the check number here".
- Print Receipt:** A checkbox labeled "Print a receipt for this payment".
- Buttons:** "OK", "Cancel", and "Help" buttons at the bottom.

**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.

Trust Deposit for - Jane Doe - Divorce

Jane Doe - Divorce

Date: 2/10/2021

Amount: 500.00

Payment Type: Credit Card

Note:

To change the case click on this box or select a different case in the contacts manager

OK Cancel Help

**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.

Payment Will Be Added

Jane Doe - Divorce

Date: 2/25/2021

Balance in Trust account: \$500.00

Transfer amount: 0.00

Description: Payment from trust acc...

To change the case click on this box or select a different case in the contact manager

The cases current trust deposit will be displayed here

OK Cancel Help

**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.

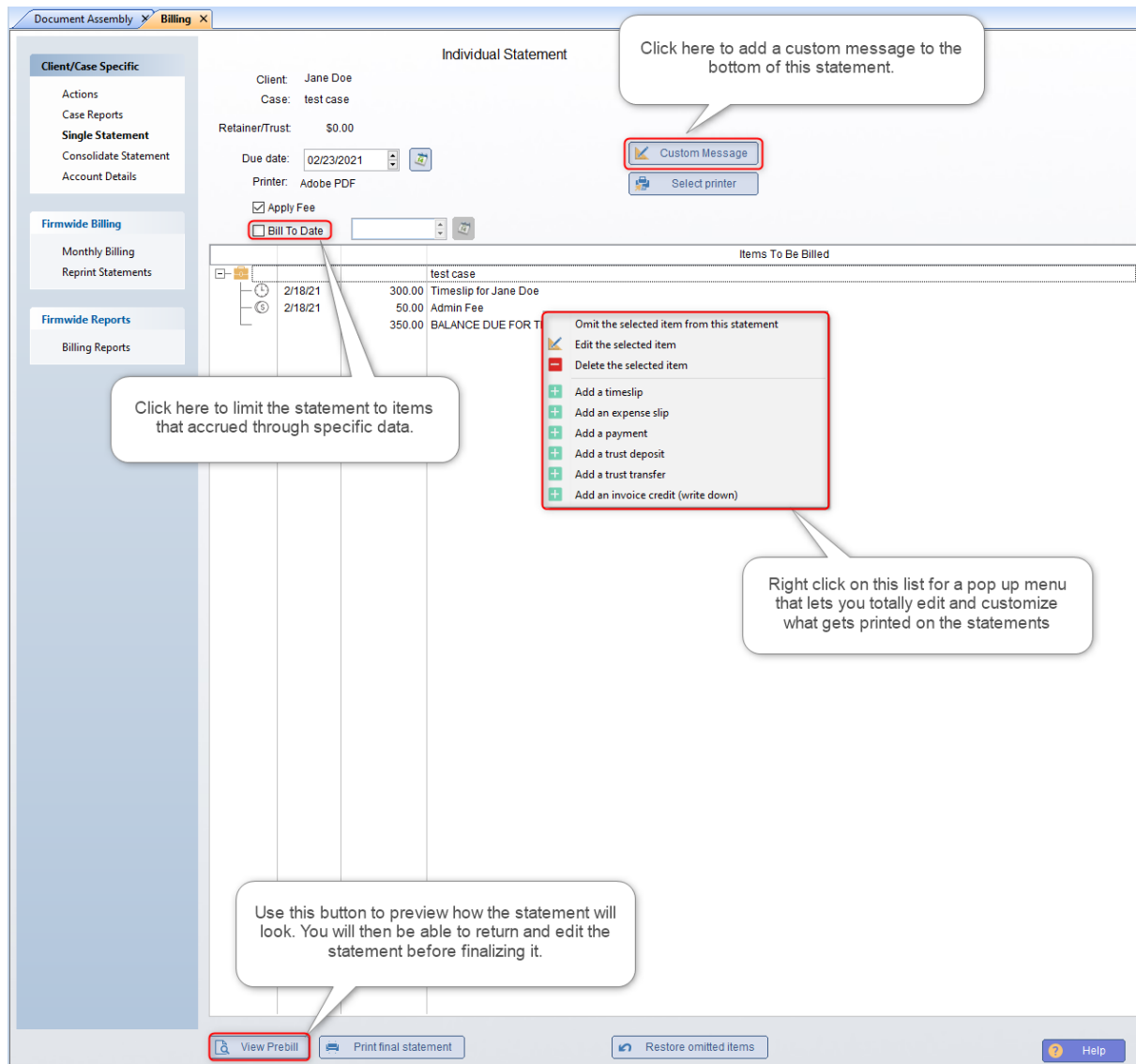
**Case History:** This option generates a report showing all billing activities for the selected active case.

**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 cause that item to not be included in this statement. The item will, however, remain in the case and you will be able 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](#) .

Document Assembly **Billing**

Client: Doe, Jane  
Case: test case Print case history

☒ Use date range From: 01/19/2021 To: 02/18/2021 Apply

Status: **Timeslips** Expense slips Statements Payments Received Credits Trustretainer deposits

**Client/Case Specific**

- Actions
- Case Reports
- Single Statement
- Consolidate Statement
- Account Details**

**Firmwide Billing**

- Monthly Billing
- Reprint Statements

**Firmwide Reports**

- Billing Reports

Current Balances - test case

ACCOUNTS DUE	
Current:	0.00
30 days:	0.00
60 days:	0.00
90+ days:	0.00

UNBILLED	
Timeslips:	300.00
Expense slips:	0.00
Payments:	0.00
Beginning Balance:	0.00
Trust account:	0.00

Help

## 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:** This 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.

Document Assembly X Billing X

Generate Statements for All Cases Not On Hold

Due date: 2/23/2021

☐ Bill To Date

Primary Attorneys

☐ Only print for selected attorneys

☐ Attorney Other

☐ Harrison Cohen

Options

☐ Exclude cases with "\$0" balances

☒ Exclude cases that are inactive

Printer

Adobe PDF

Select different printer

Print Prebill Statements

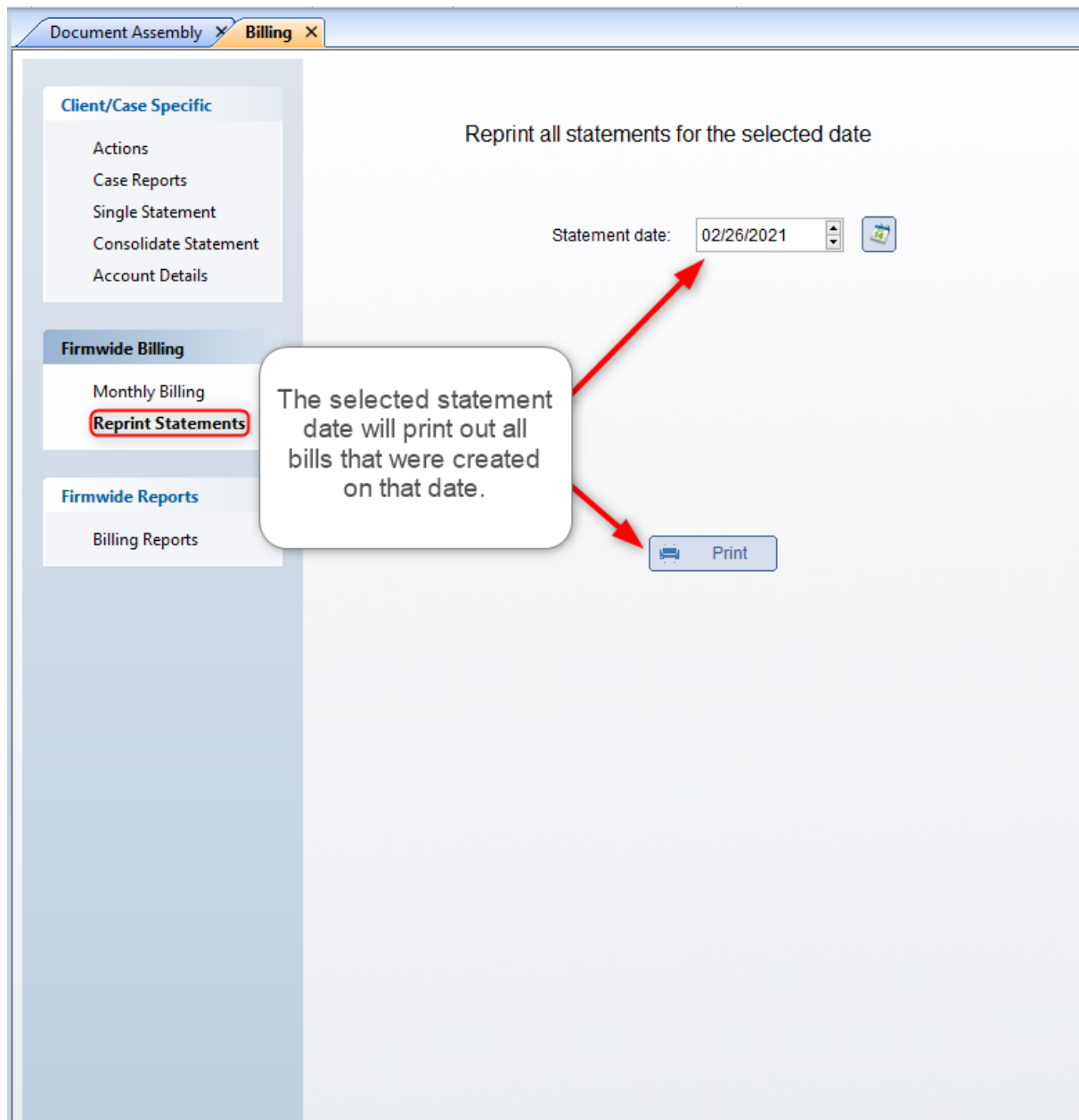
Generate final statements

"Prebill Statements" let you preview how the statements will look. You can check their accuracy and make any desired changes before generating the final statements.

Help

## **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.

The screenshot displays the TXdocs Case Manager interface. The top navigation bar includes tabs for Document Assembly, Billing, and Case Manager. The left sidebar contains a 'General' section with 'Client/Case' and 'Notes' options, and a 'People' section with 'Related Contacts' and 'Related Attorneys'. The main content area is titled 'Client/Case Details' and contains the following information:

- Client/Case Details:**
  - Client: Assembly, Joe (1ofAiyOt1iIJZxKbjZ11PVdEclgK)
  - Case: Family Law (uYzXcl.QjVzVsLeXIJYBvpCMQsTzwY)
  - Case type: (Not specified)
- Addresses:**
  - Work: 9681 Final Lane, Suite 23, San Antonio TX 78165
- Phones:**
  - Cell: (168) 464-6161
- Email:**
  - Work: txdocstest@txdocs.com
- Note:**
  - 1234567890

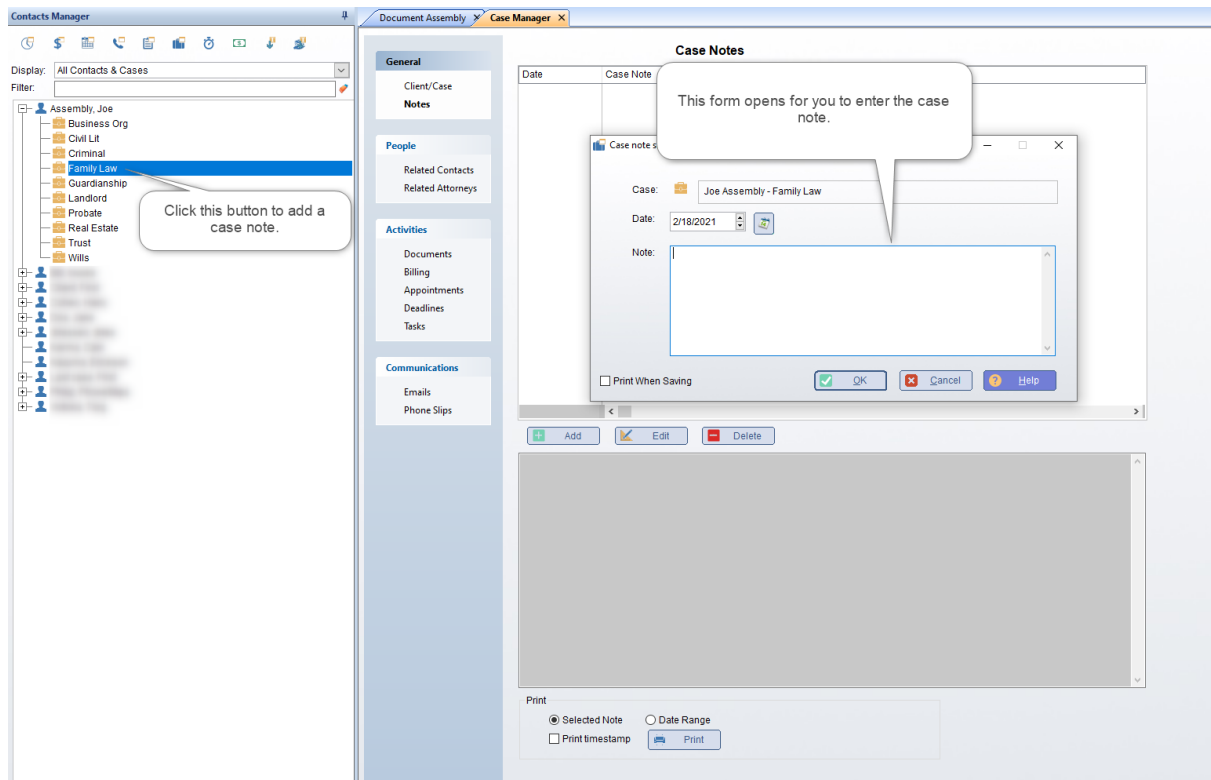
Below the information fields are two buttons: 'Edit Case' and 'Edit Client'. Callout boxes provide instructions for these buttons:

- Edit Case:** Use this button to edit the case description or other details that you normally enter when adding the case to TXdocs.
- Edit Client:** Use this button to edit the client's information.

Additional callouts explain the functionality of icons in the 'Addresses' and 'Email' sections: a clipboard icon for addresses and an envelope icon for email. A 'Help' button is located in the bottom right corner.

## 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.



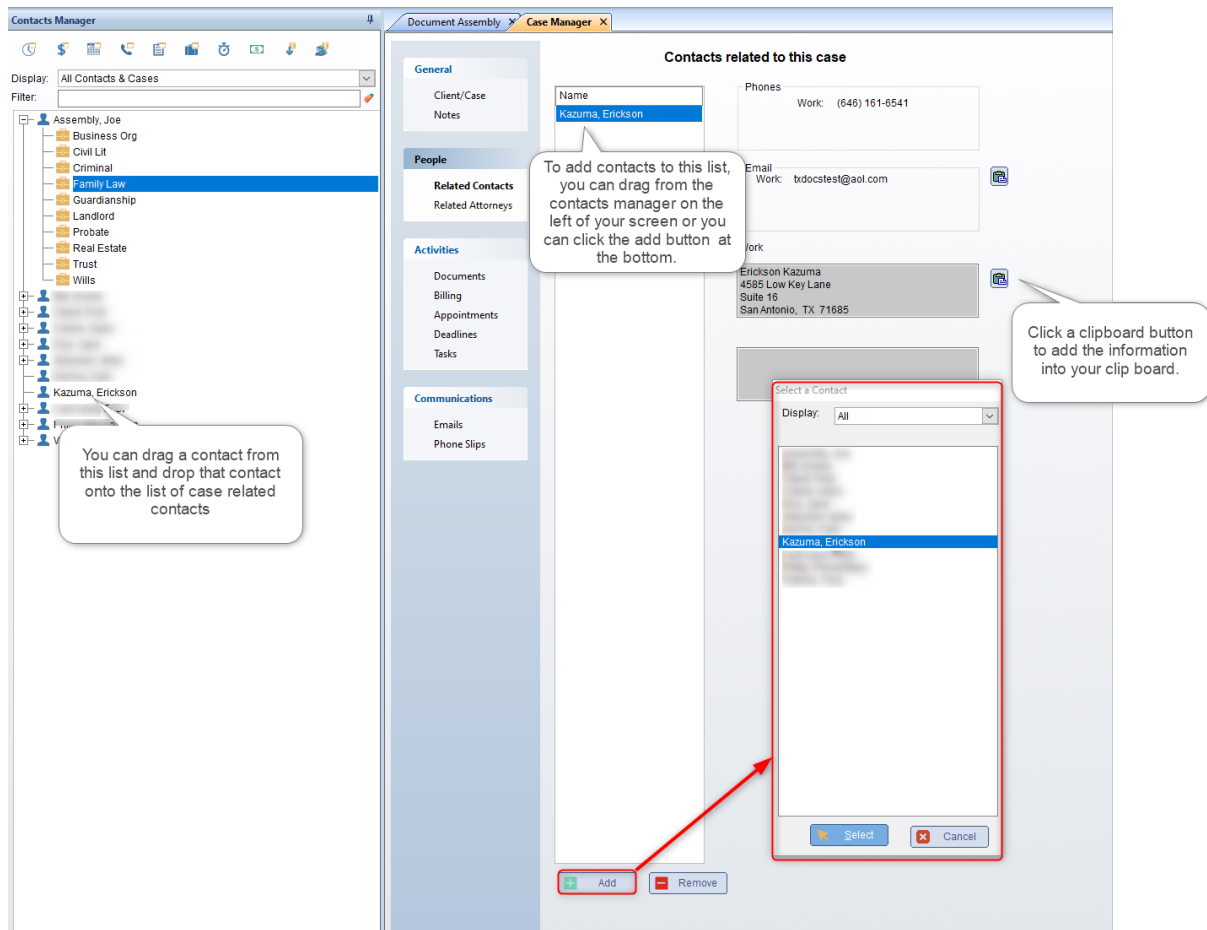
## Related Contacts

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.

TXdocsPlus - ACTIVE CASE: Joe Assembly - Family Law

Documents Practice Management Tools Clients & Cases eFiling Settings Utilities Learning Center Subscribe Now (1685 days left) Help

Family Law Tools Probate Tools Guardianship Tools Business Tools Client Web Services Texas Codes Officials Directory Attorneys Conflict Checker Deadline Calculator Import Client Worksheet

**Contacts Manager**

Display: Attorneys Filter: Random Name Test Attorney

+ Add Attorney Edit Attorney Delete Attorney

**Attorneys Related to This Case**

Name: Test Attorney Firm: Test PLLC

Addr 1: 4837 Poor location Lane

Addr 2: suite 41

City: San Antonio

State: TX

Zip: 78261

Phone: (684) 613-5468

Fax: (168) 438-4616

Email: TXDocsTest@txdocs.com

Bar No: 87246723

Test Attorney  
4837 Poor location Lane  
suite 41  
San Antonio, TX 78261

**Select an Attorney**

Filter:

Attorney Name	City
Random Name	San Antonio
Test Attorney	San Antonio

This is a list of attorneys with whom you have worked. If the attorney you want is not on the list, then take the time to add him/her by clicking the Add button. Then, select the attorney to include the information in the document you are assembling.

Firm: Test PLLC

Address: 4837 Poor location Lane  
suite 41  
San Antonio, TX 78261


Phone: 6846135468

Fax: 1684384616

Email: TXDocsTest@txdocs.com

+ Add Select Edit Delete Cancel Help

## 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.

The screenshot shows the 'Case Manager' window with the 'Documents' tab selected. The sidebar on the left has a 'Documents' button highlighted with a red box. The main area contains a table with the following data:

Date	Filename
2/22/21	Will - Single Person.wpd

At the bottom of the window, there are buttons for 'Add', 'Delete', 'Open', 'Reassemble', and 'Case folder'. Two callout boxes provide additional information:

- A callout for the 'Add' button states: "You can add documents or files not created by txdocs using this button".
- A callout for the 'Case folder' button states: "This will open the case folder on your computer. The default location of the folder is C:\TXdocs\Clientdocs. If on anywhere this will open the download upload tool".

## 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.

**Billing**

Current balances

<u>AMOUNTS DUE</u>		<u>UNBILLED</u>	<u>TRUST ACCOUNT</u>
Current:	1,311.60	Timeslips: 125.00	Remaining: 100.00
30 days:	0.00	Expense slips: 0.00	Unbilled: 25.00
60 days:	0.00		
90 days:	0.00		

Statements:

Date	Original	Remaining
2/25/21	1,036.60	936.60
2/25/21	275.00	275.00
3/03/21	125.00	125.00

This list the break down of statments and amounts

## 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 X Billing X **Case Manager X**

### Appointments

Display: ☒ Pending ☐ All

Date	Subject
3/06/21	Confirence

**General**  
Client/Case  
Notes

**People**  
Related Contacts  
Related Attorneys

**Activities**  
Documents  
Billing  
**Appointments**  
Deadlines  
Tasks

**Communications**  
Emails  
Phone Slips

Click on add an appointment.  
Any appointment added for this  
case will appear in the  
activities list.

+ Add Edit - Delete

The screenshot shows the 'Case Manager' window with the 'Deadlines' tab selected. The left sidebar contains sections for 'General' (Client/Case Notes), 'People' (Related Contacts, Related Attorneys), 'Activities' (Documents, Billing, Appointments, **Deadlines**, Tasks), and 'Communications' (Emails, Phone Slips). The 'Deadlines' section is highlighted with a red box. The main area displays a table of deadlines with columns 'Date' and 'Description'. A dropdown menu shows 'Undone'. A table entry shows the date '3/24/21' and the description 'Finish protective order'. A callout box with the text '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.' has two red arrows pointing to the 'Add' button and the 'Mark done' button at the bottom. The 'Add' button is highlighted with a red box. The 'Mark done' button is also highlighted with a red box.

**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.

**Add** **Edit** **Delete** **Mark done**

Document Assembly X Billing X **Case Manager** X

**Tasks**

Display: ☒ Not completed ☐ All

Due date	Subject
3/01/21	Review document with client

**General**

Client/Case  
Notes

**People**

Related Contacts  
Related Attorneys




**Activities**

Documents  
Billing  
Appointments  
Deadlines  
**Tasks**

**Communications**

Emails  
Phone Slips

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.

**Case Manager**

**General**

- Client/Case
- Notes

**People**

- Related Contacts
- Related Attorneys

**Activities**

- Documents
- Billing
- Appointments
- Deadlines
- Tasks

**Communications**

- Emails**
- Phone Slips

**Email**

From	To	Date	Subject
txdoc@aol.com		10/19/20	Divorce
hreas@gmail.com		10/12/20	Mysterious Mail

email from case manager

If you want to email a client from the case manager you can click on the button new email

New email Reply Reply all Forward Help

## Phone Slips

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

The screenshot shows the 'Case Manager' tab selected in the top navigation bar. The sidebar on the left contains several sections: 'General' with 'Client/Case' and 'Notes'; 'People' with 'Related Contacts' and 'Related Attorneys'; 'Activities' with 'Documents', 'Billing', 'Appointments', 'Deadlines', and 'Tasks'; and 'Communications' with 'Emails' and 'Phone Slips' (which is highlighted with a red box). The main content area is titled 'Phone Slips' and displays a single entry for '3/03/21 | Jane Doe | (210) 253-9506'. The entry details include 'Call Received - Please Call Back', 'MESSAGE: call back for walkthrough help', and 'NOTE: - print out example documents'. A red arrow points from a callout box to the entry, stating: 'The phoneslips will be displayed with notes and messages. If you right click on the phone slip you have several menu options. Show history will display phoneslips changes'. At the bottom of the main content area, there are three buttons: '+ Add', 'Edit', and 'Close Slip'. A red arrow points from a second callout box to the '+ Add' button, stating: 'Phoneslips added for a case will be placed in the case manager and the today at a glance window.'

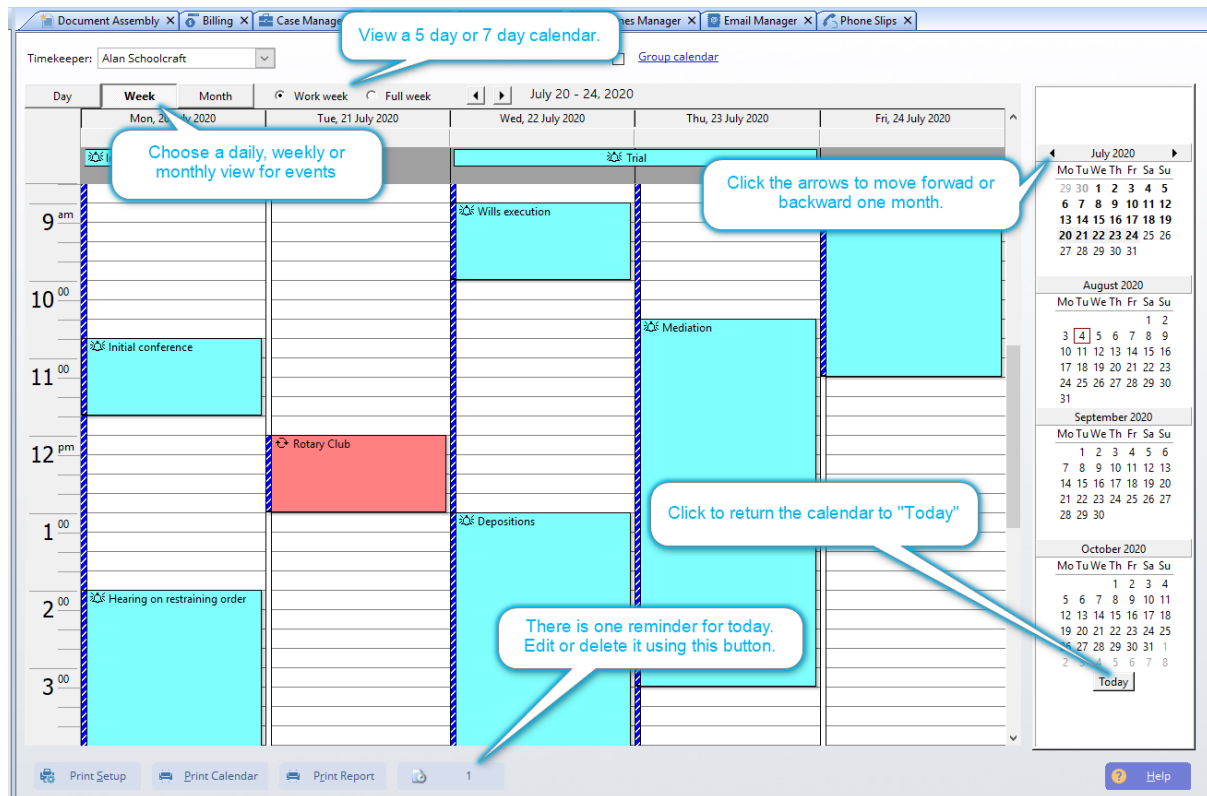
### 7.3 Calendar

**Adding events to the calendar:** There are 3 ways to add an event directly into the calendar: (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 on 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.

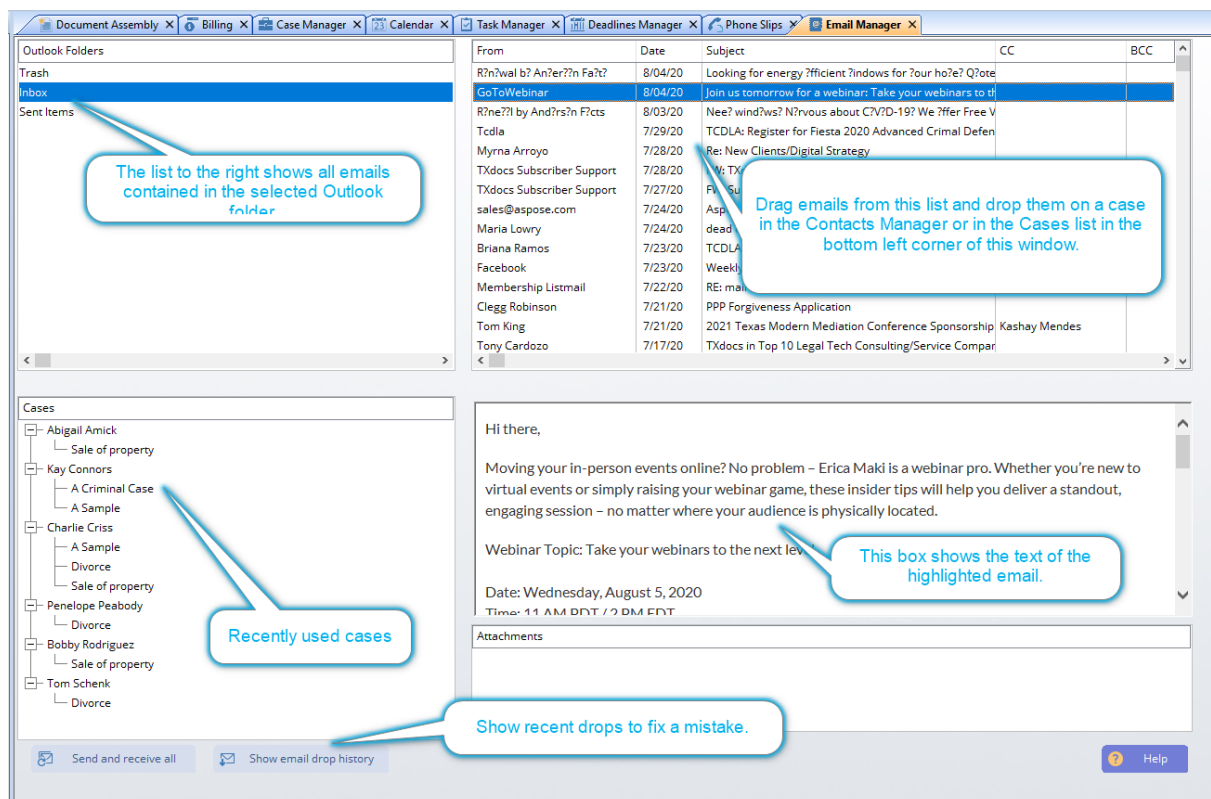
This feature is only available to you if you use Microsoft Outlook for your email and if you enabled TXdocs' integration with Outlook in Personal Settings.

**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

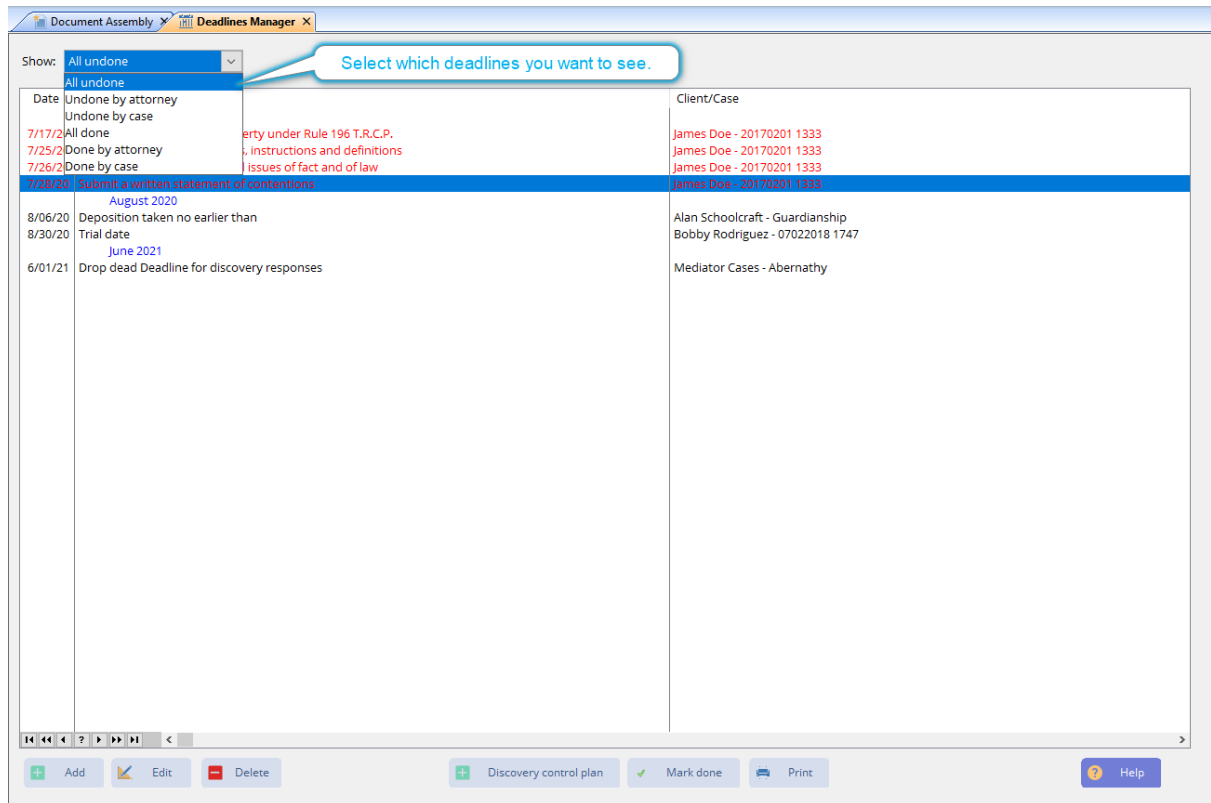
The Deadlines Manager gives you a single location for managing all deadlines for all members of your firm. From here, you can filter and see all deadlines. You can also open a window to create an entire discovery control plan and automatically add those deadlines into the manager.

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.

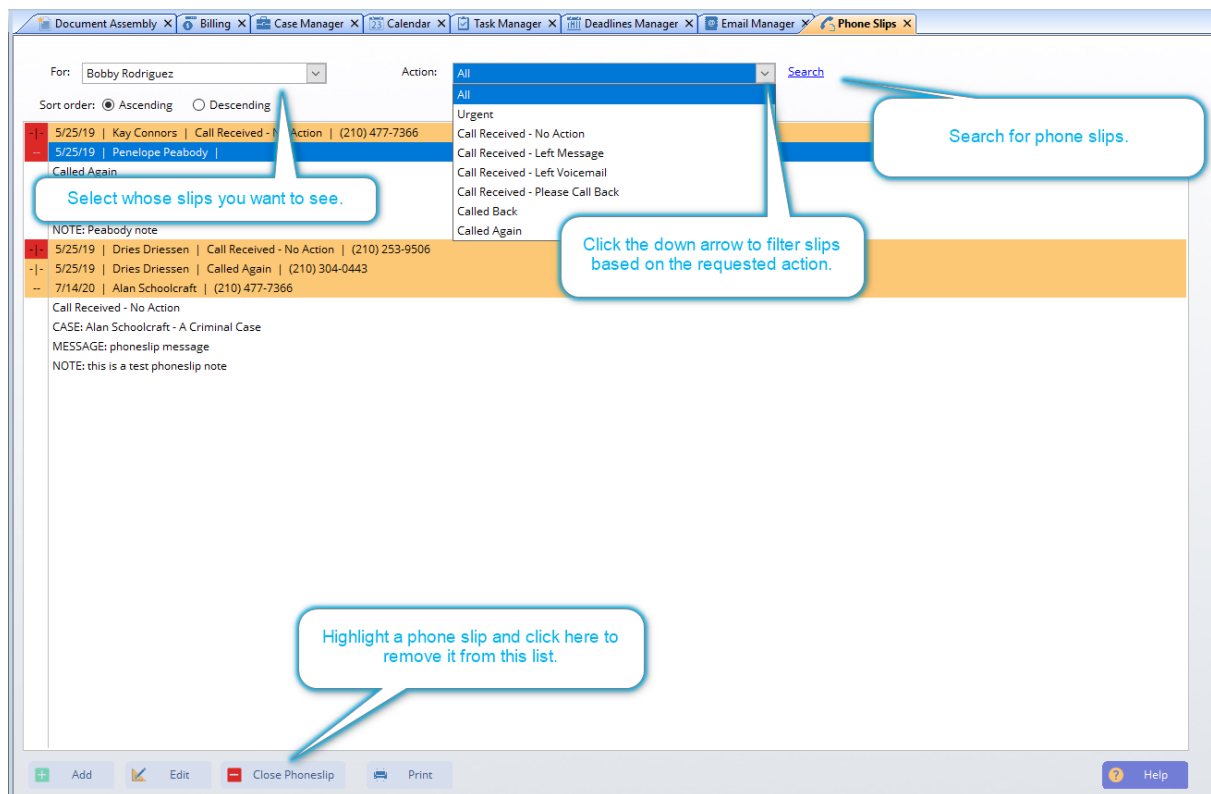
Phone slips that are flagged as urgent are shown in red.

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.

Document Assembly x Calendar x Task Manager x

Timekeeper: All v

Status: ☒ undone ☐ done ☐ both

Due date: Today v

☐ Display active contact/case only

☐ Include deadlines

Priority	Due	Subject
3	7/22/20	Review TXdocs capabilities and setup in person tra
3	7/22/20	Pick up present for Shelby

TXdocs offers free personal training for its software. Need to do that so I can figure out how to get the most benefit from that investment.

+ Add Edit - Delete ✓ Mark done Print ? Help



**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.

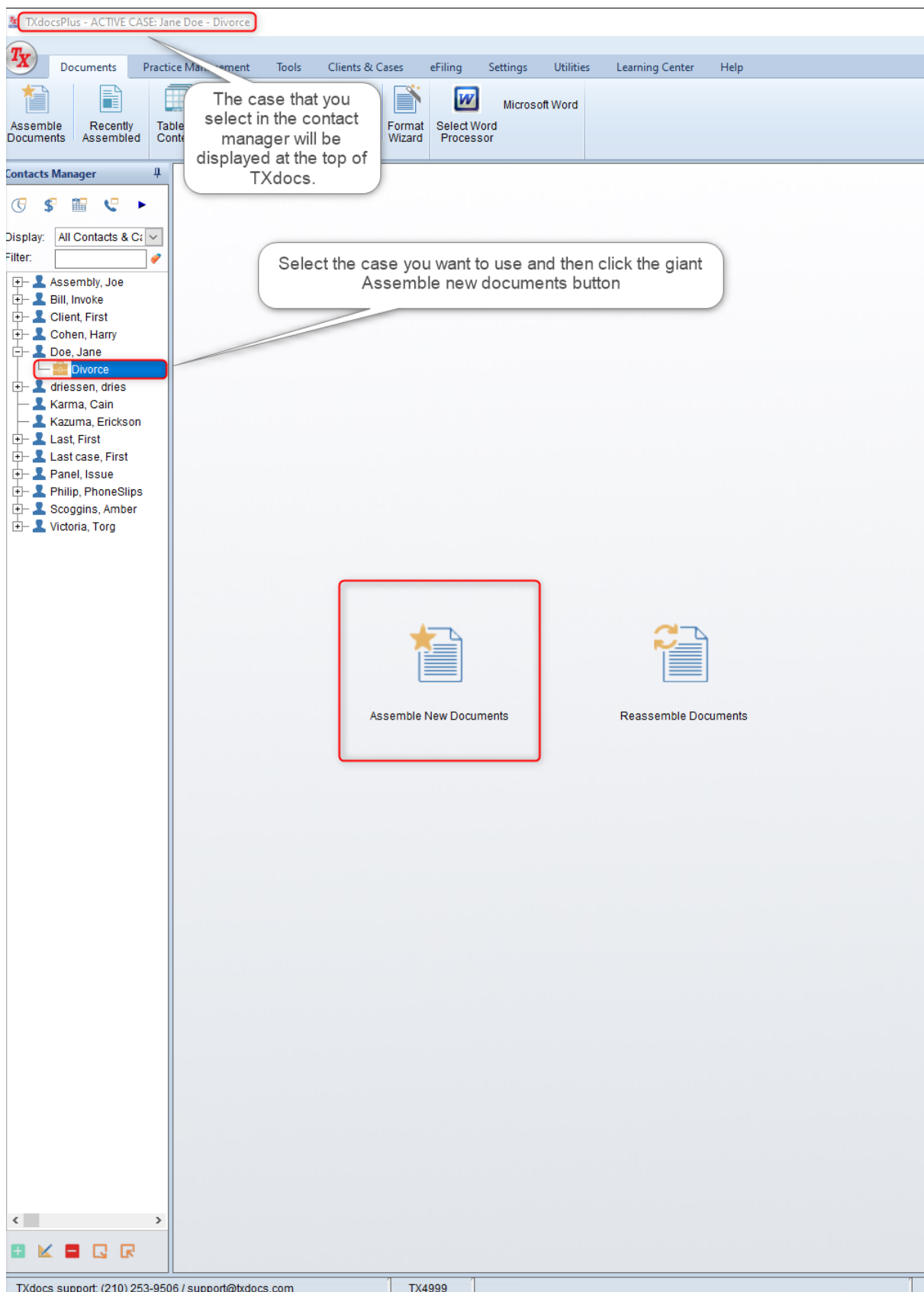
If you own a digital copy of the manual, this feature gives you the ability to import your bar forms into TXdocs to use in place of TXdocs' forms.

### 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.

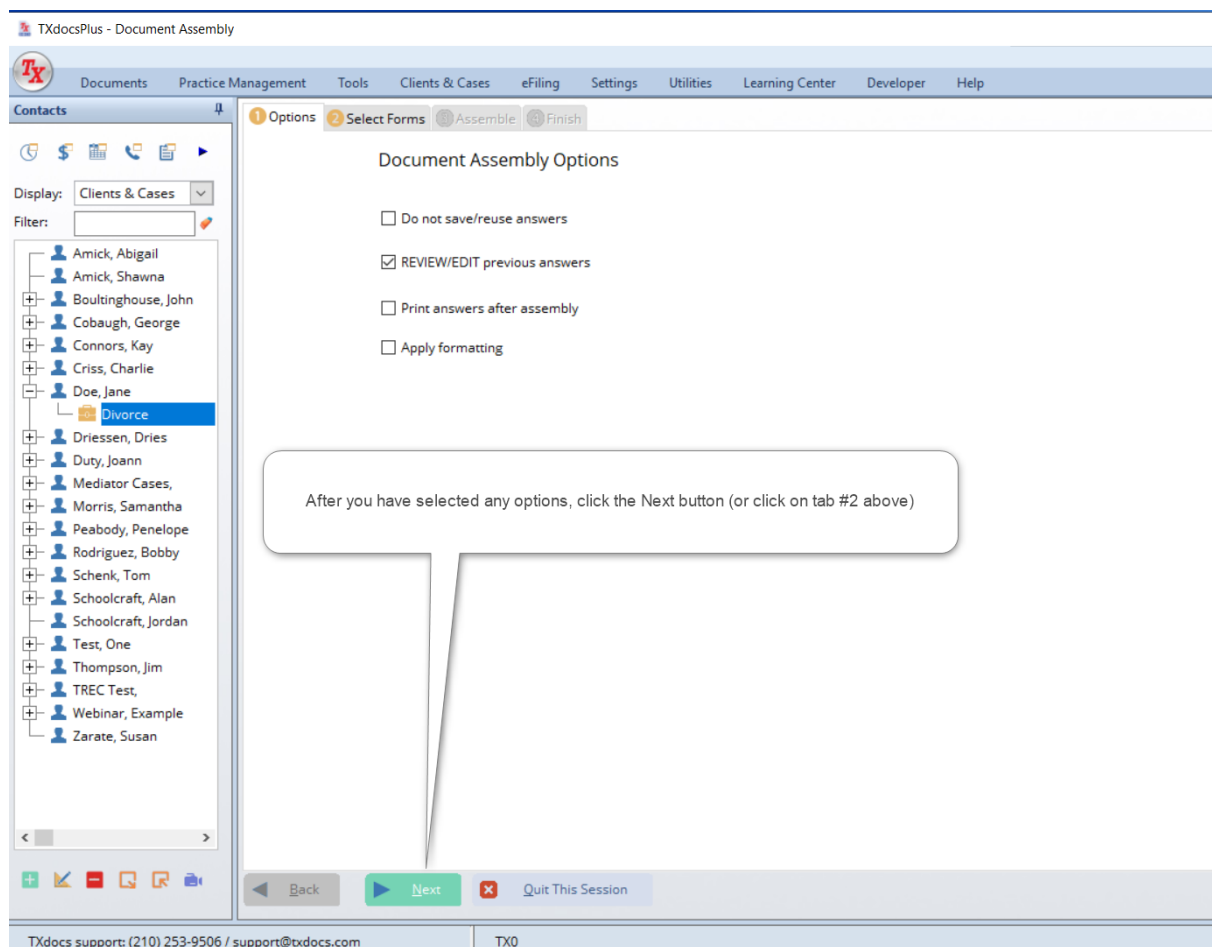
Skipping all the additional time saving details, here's a quick overview of how to assemble documents:

**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**



## **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.)

You can choose your practice area from the drop-down list

Right page shows a preview of the document

Select the form(s) you want to assemble by clicking on the box next to the form

After you have selected your forms, click Next

**Divorce**

Client Letter - Confirmation of Request to Take No Action on Case

Client Letter - Closing Divorce Representation

Client Acknowledgment of Receipt of Filing

Statement of Intention to Afford Payment of Court Costs

Request for Child Support Disbursement Unit Direct Deposit

Affidavit for Attorney's Fees

Attorney Vacation Letter

**Initiating an Action**

Child Case Information Sheet

Written for Substituted Service

Affidavit in Support of Motion for Substituted Service

Affidavit of Attempted Personal Service

Order on Motion for Substituted Service

Motion for Authorization of Citation by Publication or Other Substituted Service

Affidavit in Support of Motion for Publication or Other Substituted Service

Order Authorizing Citation by Publication or Other Substituted Service

Certificate of Last Known Mailing Address

Notice of Current Address

Letter to Opposing Party - Notice of Filing Divorce

**Divorce**

Original Petition for Divorce

Letter to Respondent with Waiver of Service

**Answer to Original Petition**

Affidavit of Allegiance - Preparer Oath - Divorce

Respondent's Original Answer to Petition for Divorce

Counterpetition to Divorce

Counteranswer to Divorce

Special Exceptions

Order on Special Exceptions

Application to Sustain Further Proceeding in Subsequent Suit

**Divorce, Findings and Agreement**

Decree of Divorce

Findings of Fact and Conclusions of Law - Divorce

Written to Sign Decree of Divorce

**Divorce**

Separate Agreement

**WAIVER OF SERVICE**

[REPEAT] (Name of Respondent, first iteration) appeared before me today and stated the following under oath:

"My name is [Name of Respondent, first iteration] and I am the Respondent in Cause No. " \* , styled " \* , which was filed on " \* in the [Court, with number, where out is pending] of [County for body of document] County, Texas. I am [Age of Respondent] years of age. My date of birth is " \* and I was born in " \* [OPTIONAL TEXT] The last three numbers of my " \* Driver's License are " \* [END OPTIONAL TEXT] [OPTIONAL TEXT] The last three numbers of my Social Security number are [SSN of Respondent - last 3 digits] [END OPTIONAL TEXT] [OPTIONAL TEXT] I do not have a driver's license number [END OPTIONAL TEXT] [OPTIONAL TEXT] I do not have a Social Security number [END OPTIONAL TEXT]

"I acknowledge receipt of a copy of the divorce petition filed in this case. My current mailing address is " \* , " \* , " \* . By signing this Waiver of Service, I agree to keep Court and Petitioner's attorney, " \* , informed of my current mailing address during these proceedings.

"I understand that I have a right to be formally served with citation by a sheriff, constable or private process server at the expense of [Name of Petitioner, first iteration] [OPTIONAL TEXT] Nonetheless, I wish to the issuance of service of process and I acknowledge that this Waiver of Service shall have the same force and effect as if the citation had been issued and served upon me as provided by law. The filing of this Waiver of Service with the clerk of the court in which this suit is filed constitutes a general appearance on my behalf in this case [END OPTIONAL TEXT]

[OPTIONAL TEXT] I am not currently in military service and have not been for more than ninety days prior to the execution of this Waiver of Service, and therefore I am not entitled to any of the rights and protections afforded me under the Servicemembers Civil Relief Act, 50 U.S.C. App. Sections 501, et. seq.

[END OPTIONAL TEXT] [OPTIONAL TEXT] [OPTIONAL TEXT] I am currently serving as [a] in [military rank of Respondent] " \* in the United States " \* and am stationed at " \* where I have been since " \* [OPTIONAL TEXT] [Exempt/Have] Orders to be deployed to " \* in " \* [END OPTIONAL TEXT]

[END OPTIONAL TEXT] [OPTIONAL TEXT] I hereby waive any and all rights and protections afforded me pursuant to the Servicemembers Civil Relief Act, 50 U.S.C. App. §§ 501, et. seq., including the right to have an attorney appointed to represent me in this proceeding.

[END OPTIONAL TEXT] [OPTIONAL TEXT] As a member of the military, I am afforded certain rights and protections pursuant to the Servicemembers Civil Relief Act, 50 U.S.C. App. §§ 501, et. seq. I understand that these rights and protections extend to me for ninety (90) days after my discharge or release from military service. By signing this Waiver of Service, I do not waive any of the rights and protections afforded me by the Servicemembers Civil Relief Act. I understand that I have the right to have an attorney appointed by this Court to represent me in this proceeding, and I specifically request this Court appoint an attorney to represent me as my attorney, at my mailing address above, of the name, mailing address, telephone number, and email contact information of my appointed attorney.

[END OPTIONAL TEXT] [OPTIONAL TEXT] As a member of the military, pursuant to Section 151.707 of the Texas Family Code, I request [OPTIONAL TEXT] the expedited temporary hearing if the Court that my military duties have a material effect on my ability to appear in person at a regularly-scheduled hearing [END OPTIONAL TEXT] [Conjunction] [OPTIONAL TEXT] the opportunity to present testimony and evidence electronically, including by teleconference or through the Internet [END OPTIONAL TEXT]

[END OPTIONAL TEXT] [END OPTIONAL TEXT] [OPTIONAL TEXT] In addition to waiving my right to service of process, I waive my right to notice of any hearing in this proceeding, whether temporary or on all issues requested in the Original Petition for Divorce and any amended or supplemental Petition which may be filed.

[END OPTIONAL TEXT] [OPTIONAL TEXT] I do not waive my right to notice of hearing in this proceeding, whether temporary or final, including final trial on all issues requested in the Original Petition for Divorce and any amended or supplemental Petition which may be filed. I do not consent to the entry of any temporary or final orders by this Court [OPTIONAL TEXT] unless I have been given notice of the hearing [END OPTIONAL TEXT] [OPTIONAL TEXT] [Conjunction] unless I have signed my agreement to the orders or judgment [END OPTIONAL TEXT]

[END OPTIONAL TEXT] [OPTIONAL TEXT] I do not [END OPTIONAL TEXT] waive the making of a record of testimony and evidence in any and all hearings in this proceeding.

## 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.

TXdocsPlus - SELECTED CASE: Jane Doe - Divorce, ASSEMBLING FORM: Original Petition for Divorce

Documents Practice Management Tools Clients & Cases eFiling Settings Utilities Learning Center Developer Help

Options Select Forms Assemble Finish

2 of 59

P00000L - AnyFam Type of  
**P12004L - Caption & Court**  
 P11991L - Party Info - PET  
 P12020L - Children - table  
 P12021L - Gestational Agn  
 P12030L - Procedural (Pet  
 P43762L - Service residen  
 P12029L - Residency Requ  
 P12018L - No children/No  
 P12031L - Long Arm Jurisd  
 P12034L - Divorce Informa  
 P12400L - Grounds for Div  
 P44806L - Protective Order  
 P12041L - 60 Day Waiting  
 P12420L - Continuing Juris  
 P12422L - Request for chil  
 P12060L - Children's Inform  
 P12038L - Court-ordered n  
 P12419L - Children's Prop  
 P12046L - Conservatorship  
 P12056L - Petitioner's Con  
 P12048L - JMC - parents or  
 P12050L - SMC/PC - paren  
 P12052L - JMC - parents or  
 P12054L - SMC/PC - paren  
 P12058L - Possession and  
 P12044L - Military Duty (Pe  
 P12040L - Child support ar  
 P12062L - Parties' Propert  
 P12063L - Equitable factor  
 P12065L - Other equitable

Previous Next Panel Help Quick Text Set Default Quit Help

### Court Information

County where case is/will be filed

\*

Type of court

☒ District Court

☐ County Court at Law

☐ Unknown

Court Number (e.g., 112th)

Cause Number, if known

\*\*\*Bottom\*\*\*

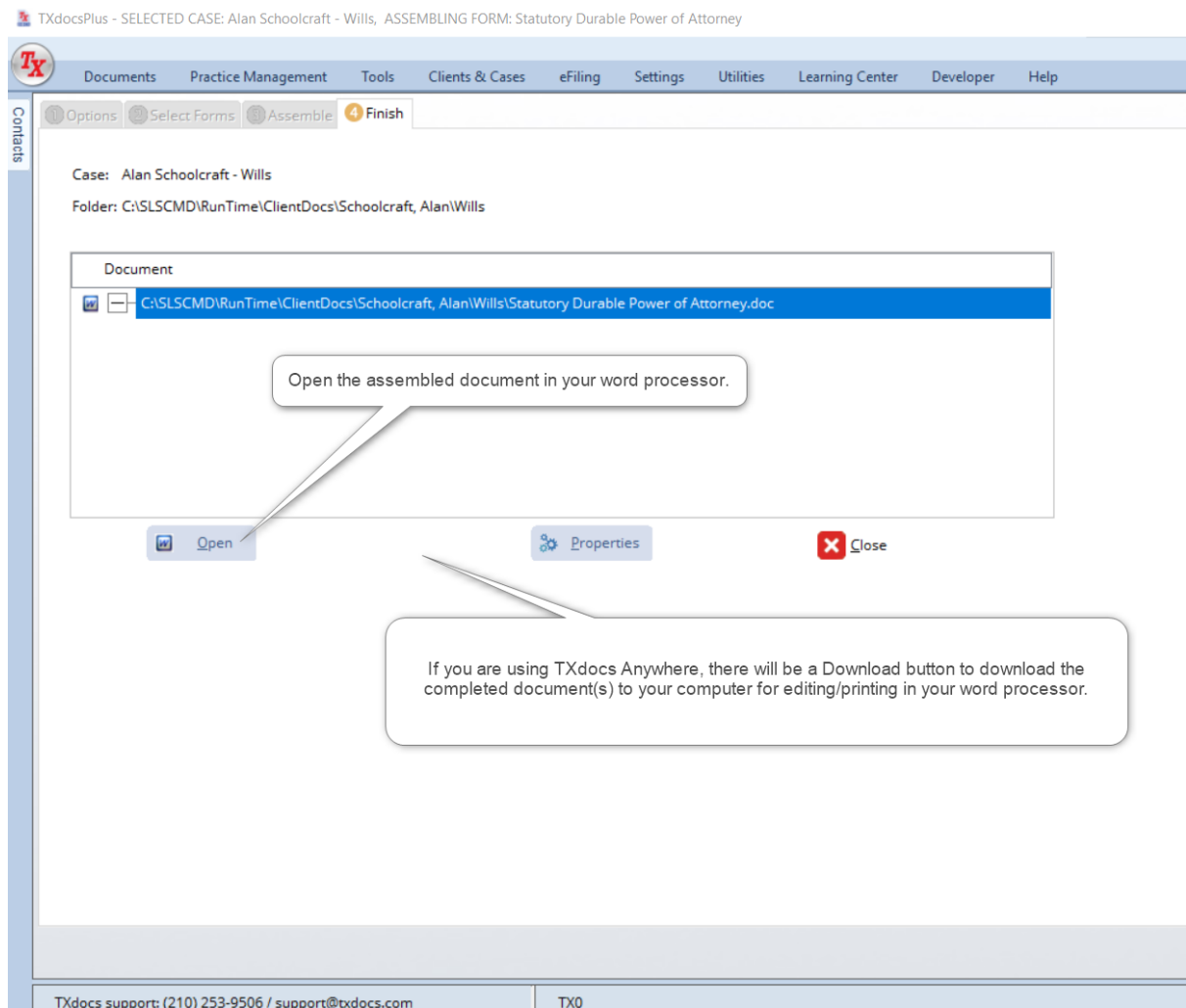
Click Next to continue to the next set of questions.

A red asterisk indicates that the question is required and must be answered before you can continue to the next set of questions.

TXdocs support: (210) 253-9506 / support@txdocs.com TX0

## **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.



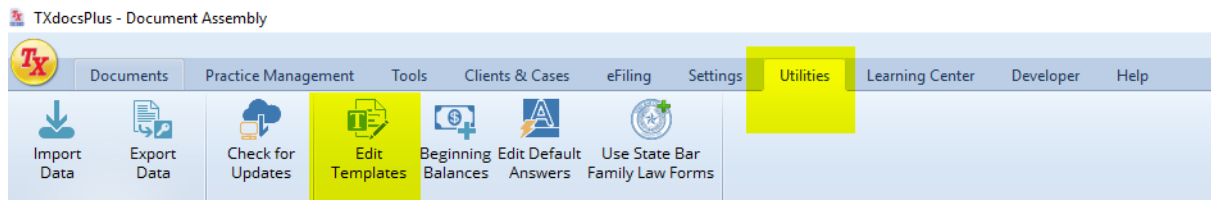
### 8.3 How to Edit Templates

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:

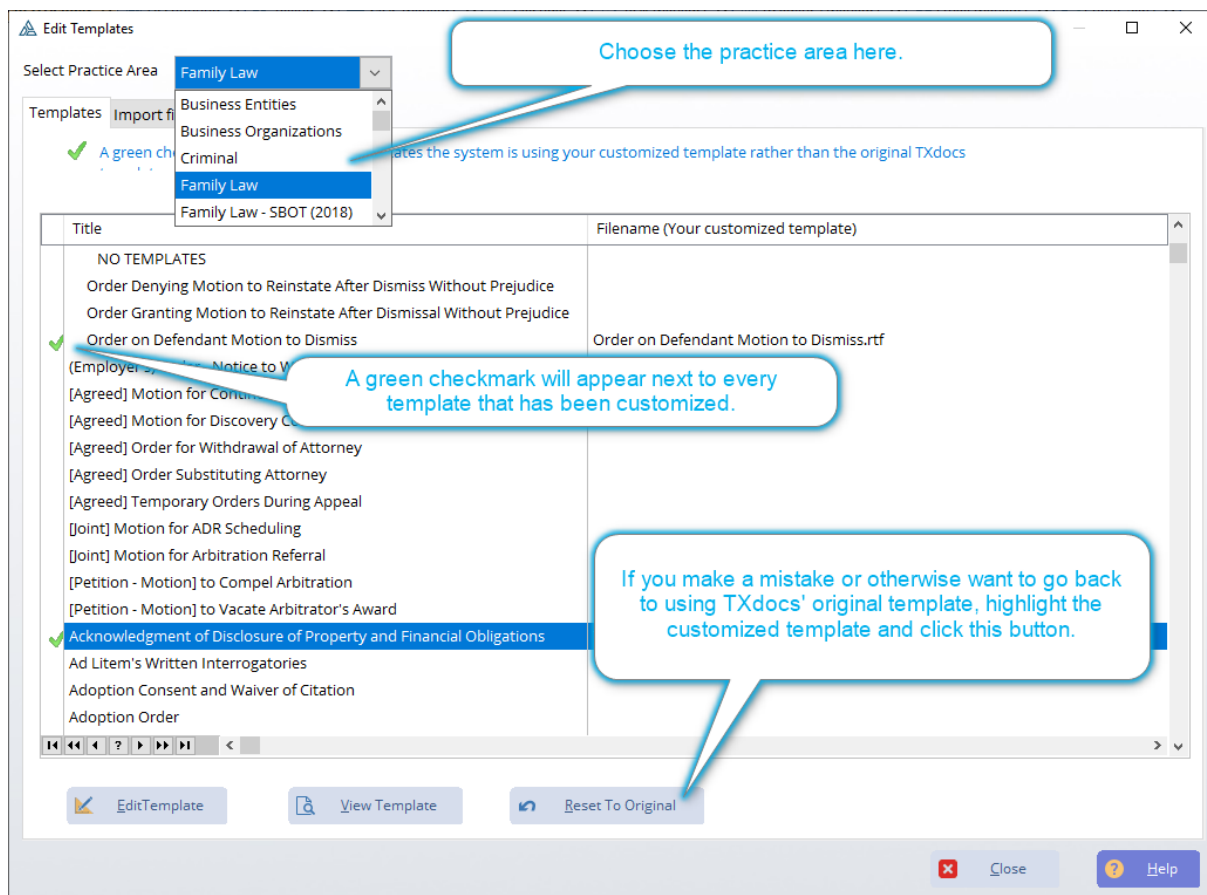
1. If you change a template, TXdocs will no longer be able to update that template if the law changes. That means you will have to remember to go back into the changed template and update it yourself.

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

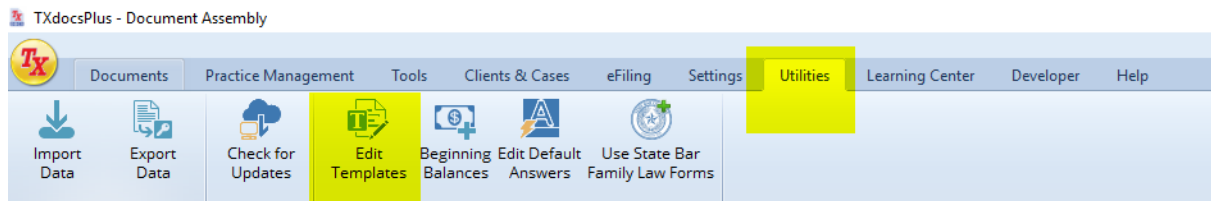
TXdocs contains a template for every form in our menu. These templates contain standard language that will be included in the documents you assemble. You can change these templates so that



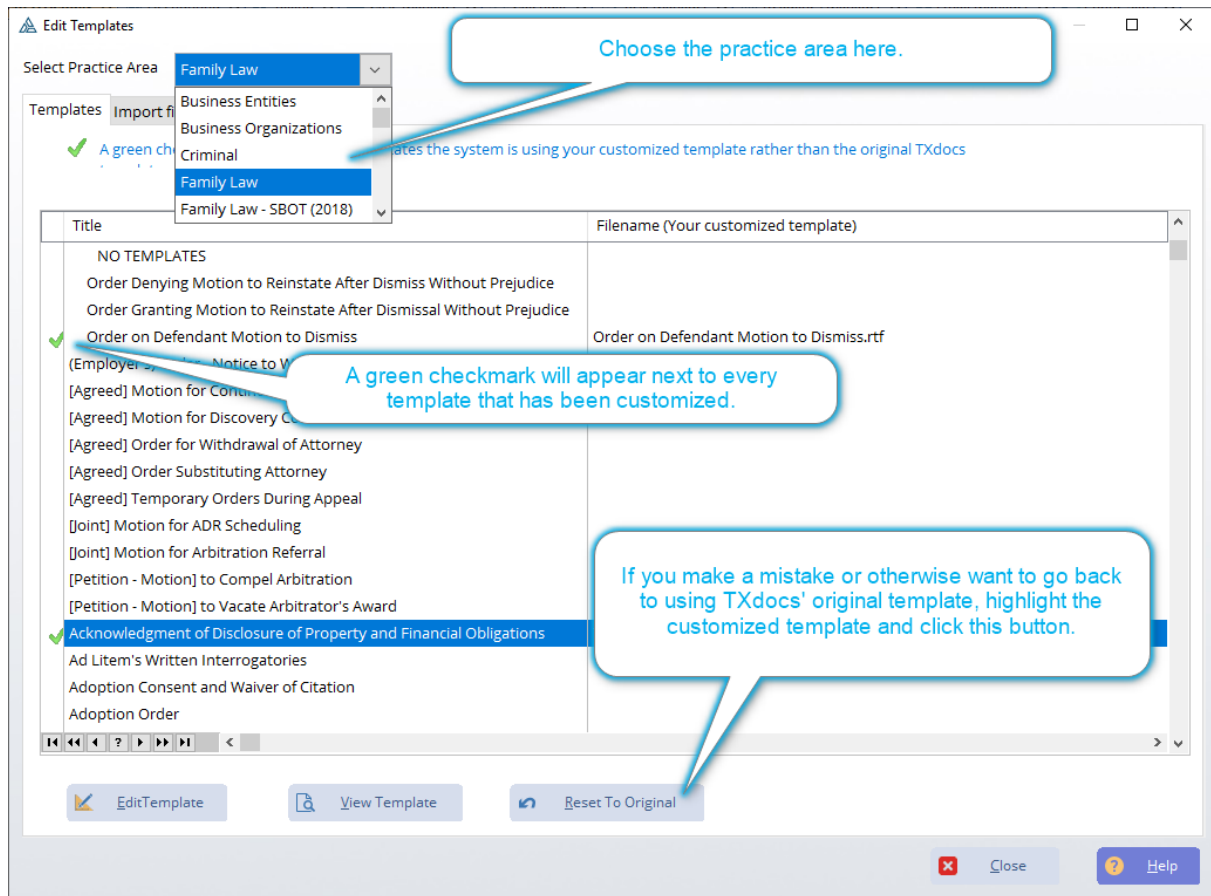
TXdocs will assemble a document using different language from what we provide. BUT, there are two very important points you should know before you make any changes:

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.

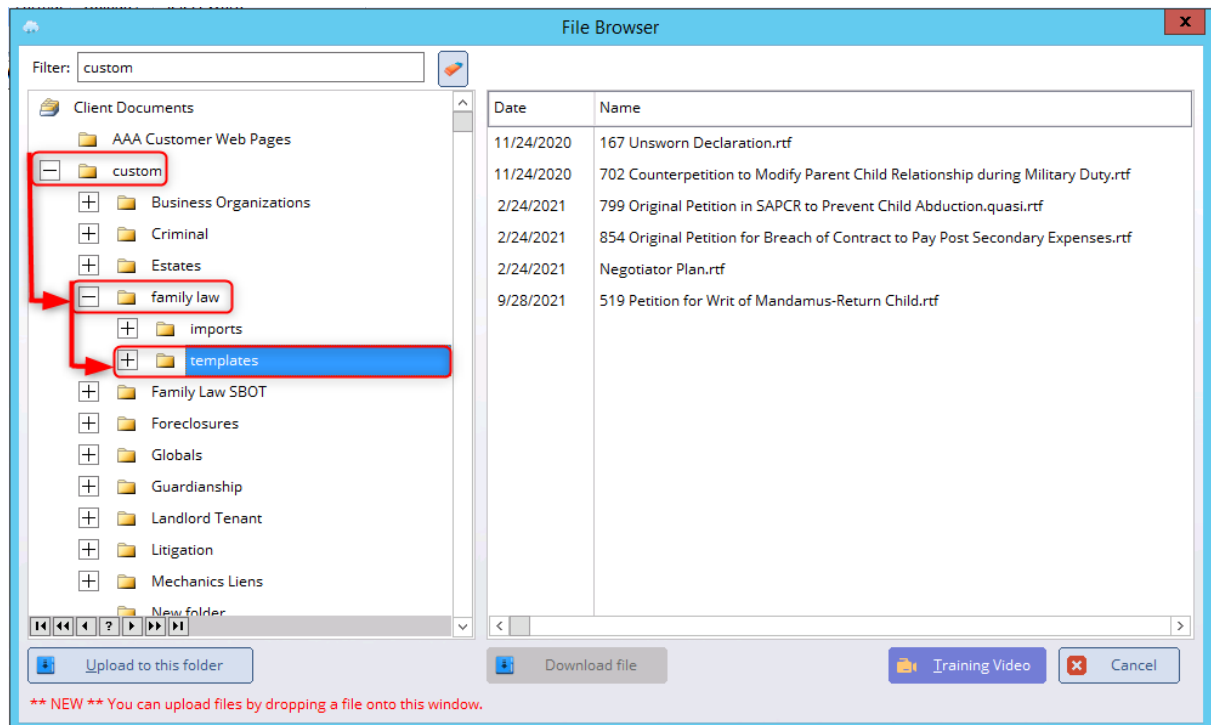
To get started, select **Edit Templates** on the **Utilities** ribbon bar.



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



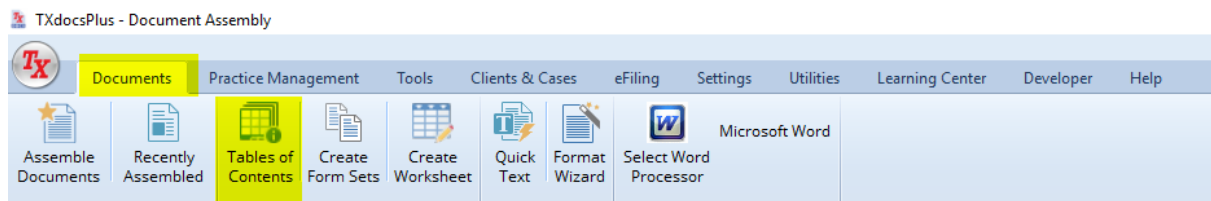
After clicking on Edit Template a copy of the template will be downloaded to your machine. When downloaded open the document in your word processor of choice. Change the Text to your preferred wording (**\*\*\*Do not rename the downloaded Document\*\*\***) then upload the document back into TXdocs. Upload 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.



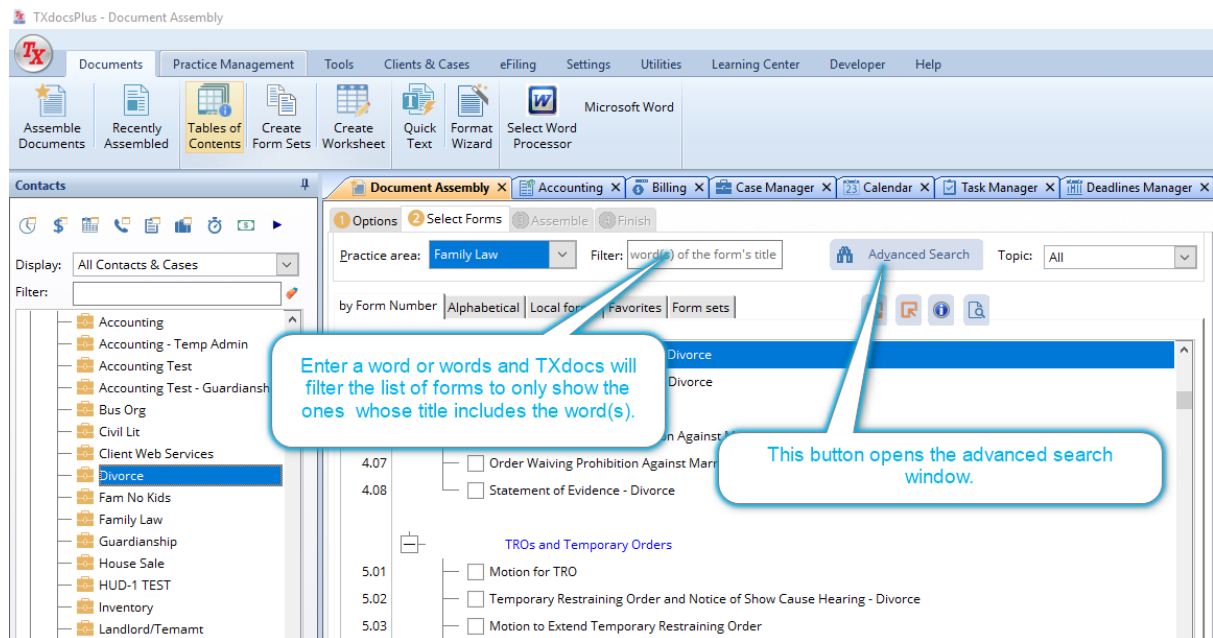
## 8.5 How to Find a Form

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 in 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.

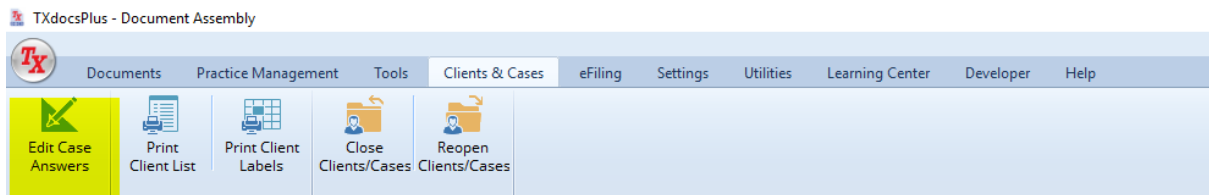
Document Assembly Options

- ☐ Do not save/reuse answers
- ☒ REVIEW/EDIT previous answers
- ☐ Print answers after assembly
- ☐ Apply formatting

Check this box to tell TXdocs you do not want to skip questions you have previously answered.

Back Next Quit This Session Help

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



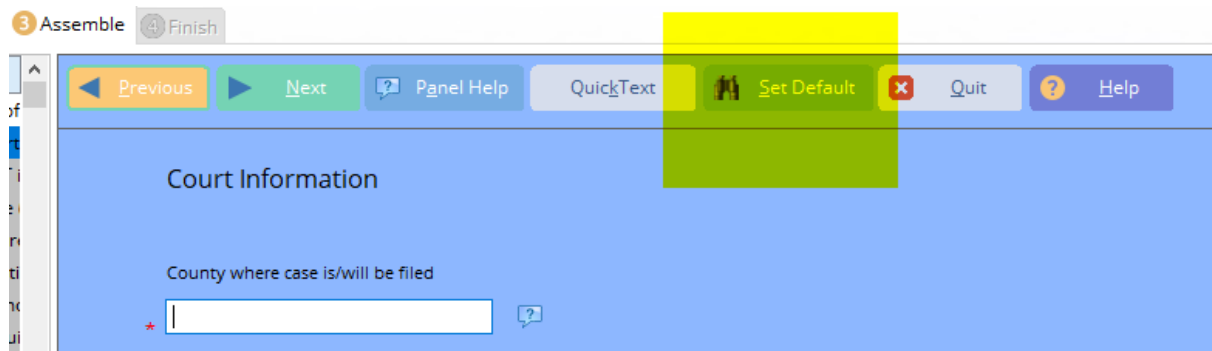
## Edit Case Answers window

### 8.9 How to Set Default Answers

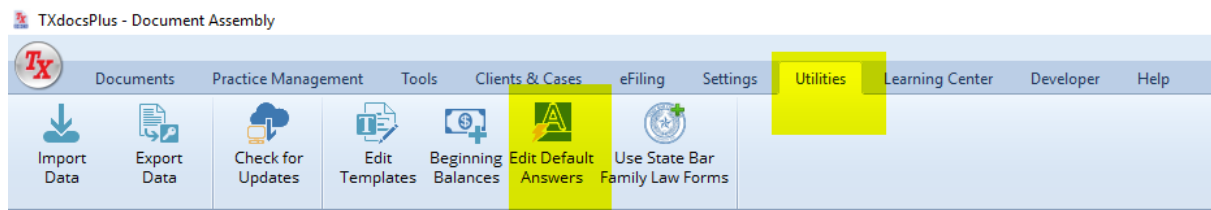
A default answer is an answer that will display the first time a question is asked in a case. If the default is correct, simply continue on without having to type anything. If not - just type over it. Setting default answers saves you time and effort, not to mention it relieves you from the tedious task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

