Online Intake Step-by-Step Guide

Sending a Questionnaire

1. Click the ‘Online Intake’ button on the TXdocs start screen ❶ and then click ‘Request client information’.
2. From the Online Intake Manager ❷, select a client and case. If an email address does not prefill (because one’s not already associated with the client), you’ll need to add one.
3. Choose a practice area and select the desired questionnaire(s).
4. Click the preview button to preview the questionnaire if desired.
5. Optionally, customize the subject line and/or include a personal salutation.
6. Click ‘Send’ to send the welcome email/invite to your client. Once logged in, they will see the questionnaire on their dashboard. ❸

Downloading a questionnaire

1. Click the ‘Online Intake’ button on the TXdocs start screen ❶ and then click ‘Download client information’
2. From the Online Intake Manager ❹, click on the client’s finished questionnaire to select it.
3. Click the ‘Download client’s data’ button
4. If you’re downloading a Family Law questionnaire, fill in if the client is the petitioner or the respondent.
5. Print or download the datasheet if needed. (The datasheet is automatically saved to the case folder.)
6. The downloaded information is immediately available for document assembly.

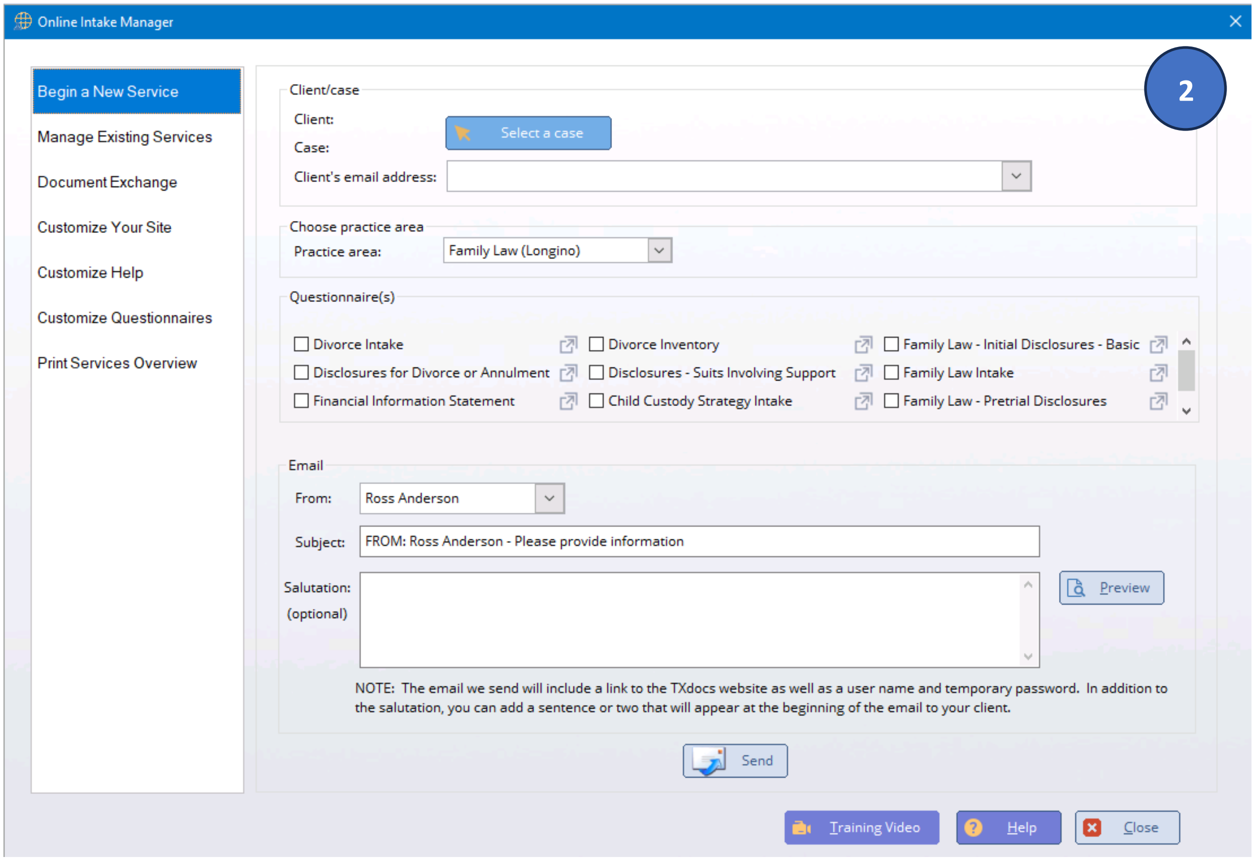
Troubleshooting

Note: the button options presented below are found in the Online Intake Manager ❹❺. To access the manager, click ‘Online Intake’ on the TXdocs start screen ❶, then select ‘Download Client Information’.

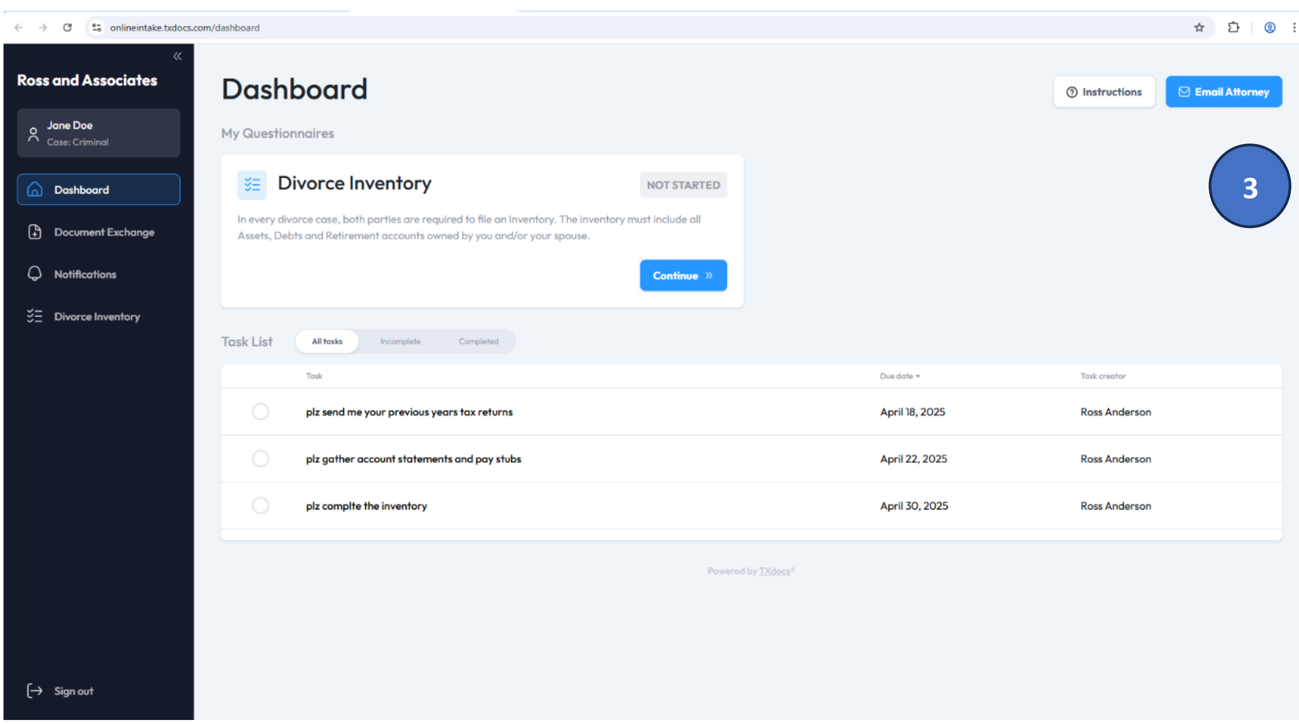
- Client says that they did not receive the welcome email/invite
  - You can resend the client’s welcome email. For security reasons, their login will be reset and they will be provided with a new, temporary password.
- Client can’t log in anymore.
  - They are either using the wrong email address or the wrong password.
  - Verify the email address they’re using in the ‘Change email address’ window.

    - If the email address they are using is correct, you can resend the welcome email since it will reset their password.
    - If the email address they are using is not correct, you can change the email address. Their login will be reset, and they will be provided with a new, temporary password for security reasons.
- After downloading the client's data (completed questionnaire), it's discovered that the client skipped important questions.
    - You can reopen the questionnaire. This will send the questionnaire back to your client's dashboard ❸ for completion.
- Client calls/emails with questions about the questionnaire, does not know what is being asked.
    - You can view the questionnaire with their answers using the 'Open as User' button. This allows you to access your client's dashboard ❸, view the questions and their answers with them, and offer guidance.
- (Family Law only) I downloaded the client data/completed questionnaire, then later found out that my client, whom I'd designated as the petitioner, is actually the respondent.
    - You can use the 'Undo download' button to remove the downloaded answers from TXdocs. You can then download again, this time designating your client as the respondent

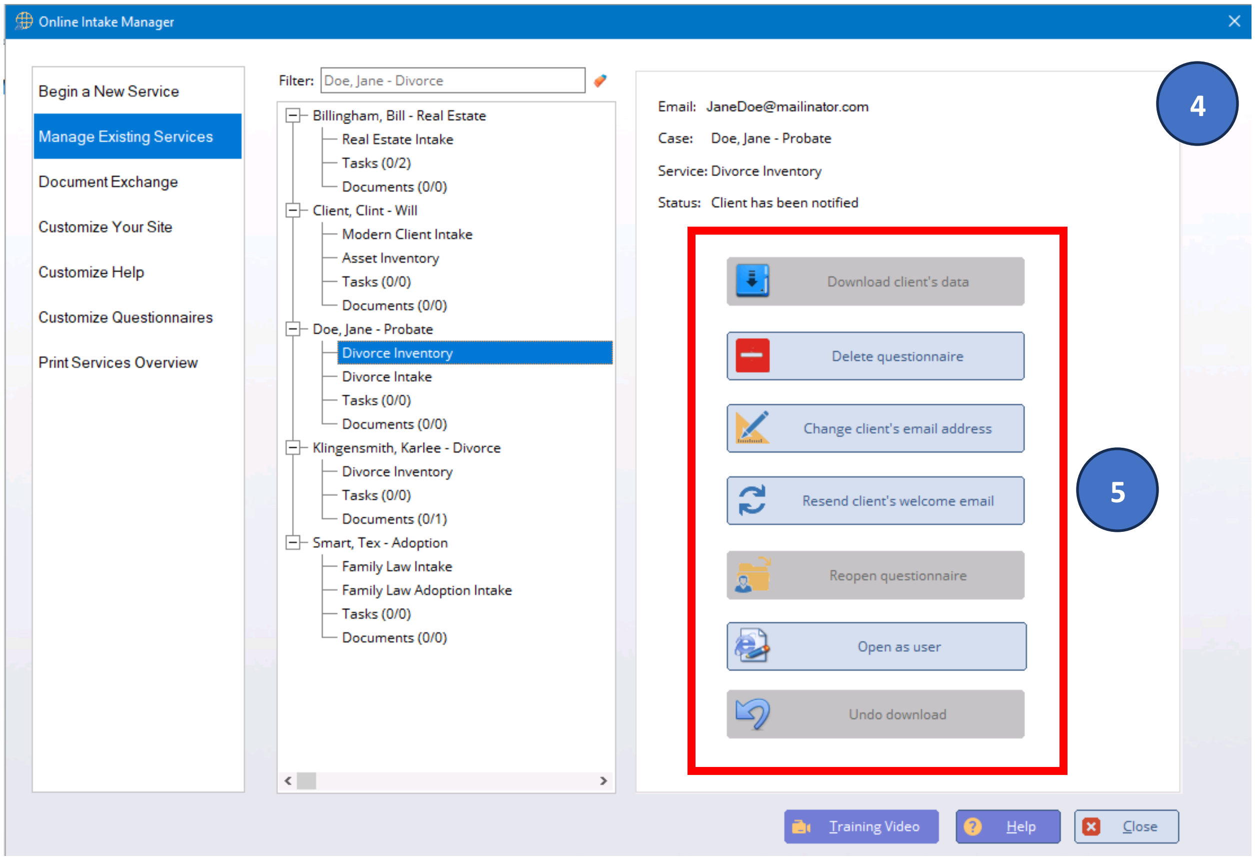
Online Intake Screen Shots


Online Intake Manager
Begin a New Service
Manage Existing Services
Document Exchange
Customize Your Site
Customize Help
Customize Questionnaires
Print Services Overview
Client/case
Client:
Case:
Select a case
Client's email address:
Choose practice area
Practice area:
Family Law (Longino)
Questionnaire(s)
Divorce Intake
Divorce Inventory
Family Law - Initial Disclosures - Basic
Disclosures for Divorce or Annulment
Disclosures - Suits Involving Support
Family Law Intake
Financial Information Statement
Child Custody Strategy Intake
Family Law - Pretrial Disclosures
Email
From:
Ross Anderson
Subject:
FROM: Ross Anderson - Please provide information
Salutation:
(optional)
Preview
NOTE: The email we send will include a link to the TXdocs website as well as a user name and temporary password. In addition to the salutation, you can add a sentence or two that will appear at the beginning of the email to your client.
Send
Training Video
Help
Close

2


onlineintake.txdocs.com/dashboard
Ross and Associates
Jane Doe
Case: Criminal
Dashboard
Document Exchange
Notifications
Divorce Inventory
Sign out
Dashboard
Instructions
Email Attorney
My Questionnaires
Divorce Inventory
NOT STARTED
In every divorce case, both parties are required to file an Inventory. The inventory must include all Assets, Debts and Retirement accounts owned by you and/or your spouse.
Continue
Task List
All tasks
Incomplete
Completed
Task
Due date
Task creator
plz send me your previous years tax returns
April 18, 2025
Ross Anderson
plz gather account statements and pay stubs
April 22, 2025
Ross Anderson
plz complte the inventory
April 30, 2025
Ross Anderson
Powered by TXdocs®

3


Online Intake Manager
Begin a New Service
Manage Existing Services
Document Exchange
Customize Your Site
Customize Help
Customize Questionnaires
Print Services Overview
Filter: Doe, Jane - Divorce
Billingham, Bill - Real Estate
Real Estate Intake
Tasks (0/2)
Documents (0/0)
Client, Clint - Will
Modern Client Intake
Asset Inventory
Tasks (0/0)
Documents (0/0)
Doe, Jane - Probate
Divorce Inventory
Divorce Intake
Tasks (0/0)
Documents (0/0)
Klingensmith, Karlee - Divorce
Divorce Inventory
Tasks (0/0)
Documents (0/1)
Smart, Tex - Adoption
Family Law Intake
Family Law Adoption Intake
Tasks (0/0)
Documents (0/0)
Email: JaneDoe@mailinator.com
Case: Doe, Jane - Probate
Service: Divorce Inventory
Status: Client has been notified
4
Download client's data
Delete questionnaire
Change client's email address
Resend client's welcome email
5
Reopen questionnaire
Open as user
Undo download
Training Video
Help
Close