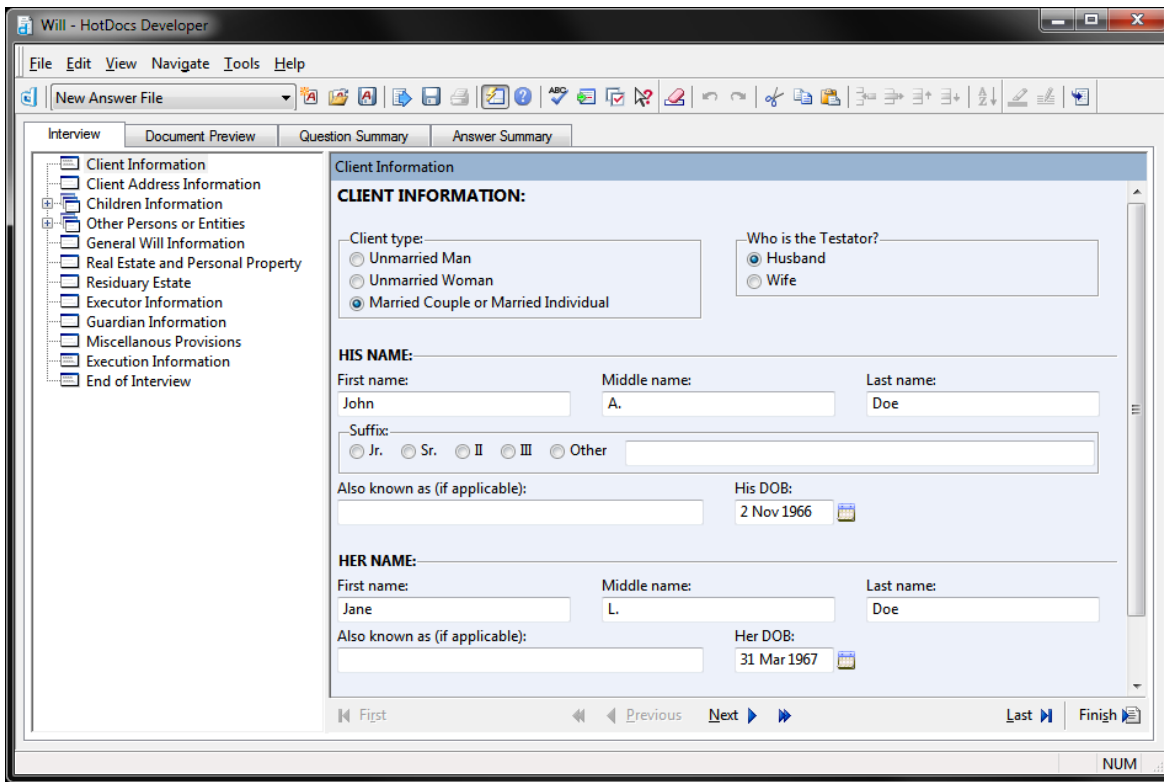


## What Is Document Assembly?

Most document assembly programs integrate with your word processor and enable you to create sophisticated templates. Those templates typically generate an interview (series of questions) presented to the user. Upon answering the questions, a customized document is instantly generated. In addition to simply filling in blanks, document assembly programs support conditional logic (i.e., include the guardianship paragraph if the client has minor children or adult disabled children), infinite lists, and the ability to calculate text, numbers and dates.

The on-screen interview is quite powerful because the template designer can control everything about the sequence and content of the interview. With practice, you can reproduce your entire decision tree in the template and build in safe-guards that walk even novice users through the assembly process. An example of how an interview looks is shown below:



The screenshot shows a software window titled "Will - HotDocs Developer". The interface includes a menu bar (File, Edit, View, Navigate, Tools, Help) and a toolbar. Below the toolbar are tabs for "Interview", "Document Preview", "Question Summary", and "Answer Summary". A left-hand navigation pane lists various sections of the will, such as "Client Information", "Client Address Information", "Children Information", "Other Persons or Entities", "General Will Information", "Real Estate and Personal Property", "Residuary Estate", "Executor Information", "Guardian Information", "Miscellaneous Provisions", "Execution Information", and "End of Interview".

The main area displays the "Client Information" form, which is titled "CLIENT INFORMATION:". It contains the following fields and options:

- Client type:** Radio buttons for "Unmarried Man", "Unmarried Woman", and "Married Couple or Married Individual".
- Who is the Testator?:** Radio buttons for "Husband" (selected) and "Wife".
- HIS NAME:**
  - First name: John
  - Middle name: A.
  - Last name: Doe
  - Suffix: Radio buttons for "Jr.", "Sr.", "II", "III", and "Other".
- Also known as (if applicable):** An empty text field.
- His DOB:** 2 Nov 1966 (with a calendar icon).
- HER NAME:**
  - First name: Jane
  - Middle name: L.
  - Last name: Doe
- Also known as (if applicable):** An empty text field.
- Her DOB:** 31 Mar 1967 (with a calendar icon).

At the bottom of the form, there are navigation buttons: "First", "Previous", "Next", "Last", and "Finish". A status bar at the very bottom shows "NUM".

Figure I-1

1. **How It Works - Big Picture:** Using HotDocs as an example, the program allows users to replace changeable text with variables (i.e., «Testator Name», «Testator Street Address»), make the inclusion of text (words, sentences, paragraphs, etc.) conditional, gather (infinite) lists, and automatically calculate dates, text and numbers.

By "lists", I mean that the template can gather and process multiple records. This is particularly important with legal documents because there are almost always parties and you never know how many there will be. For example, in a deed, you have grantors and grantees. There could be more than 1 of each. In estate planning documents, there may be multiple children listed, executors/personal representatives, beneficiaries, guardians, or trustees. All of those things are lists. Good document assembly software lets you enter as many parties as necessary and based upon how many you enter, the template will produce correct language. For example, depending upon what the user enters into a list of children in a Will, the document may say:

"Barron Henley has no children." or

"Barron Henley has one child, Ariel, age 20." or

"Barron Henley has two children, Ariel, age 20 and Alexis, age 18." or

"Barron Henley has three children, Ariel, age 20, Alexis, age 18 and Rylee, age 16."

The point is that whatever the user enters, the template produces the correct language and verb conjugation; and it doesn't matter how many there are.

With each new variable, you create a corresponding question (prompt) which is presented to the user during the assembly process. Generating a new document is a simple matter of answering the questions presented by the template. After the questions are answered, the completed document appears on the screen (in Word or WordPerfect), ready edit, save, print, etc.

After a document is assembled, HotDocs allows users to save the *answers* entered for one document so that they can be used to assemble other documents which use the same information. In this manner, users simultaneously decrease the margin for error while eliminating time wasted on redundant data entry. The document produced by HotDocs is a plain word processor document and can be edited and stored like any other document.

2. **Document Assembly Options:** There are several available document automation applications and while each has its own unique way of handling the task, they all are very capable and able to achieve the objectives we discuss below. Each of them work with Word or WordPerfect or both. Some provide the ability to automate PDF forms. Because HotDocs continues to dominate the market and both of us are most familiar

with it we refer to and show examples from HotDocs throughout this article but we could just as easily be referring to any of these applications. It is highly recommended that you explore the various options and decide for yourself which application best meets your practice needs in terms of availability, functionality and cost. Here are some options:

- HotDocs - [www.hotdocs.com](http://www.hotdocs.com)
- TheFormTool & Doxserá - [www.theformtool.com](http://www.theformtool.com)
- ContractExpress - <http://contractexpress.com>
- Rapidocs - [www.rapidocs.com](http://www.rapidocs.com)
- Pathagoras - [www.pathagoras.com](http://www.pathagoras.com)
- Perfectus - [www.dpa-technologies.com](http://www.dpa-technologies.com)
- ActiveDocs - [www.activedocs.com](http://www.activedocs.com)
- Smokeball - [www.smokeball.com](http://www.smokeball.com)
- Exari - [www.exari.com](http://www.exari.com)