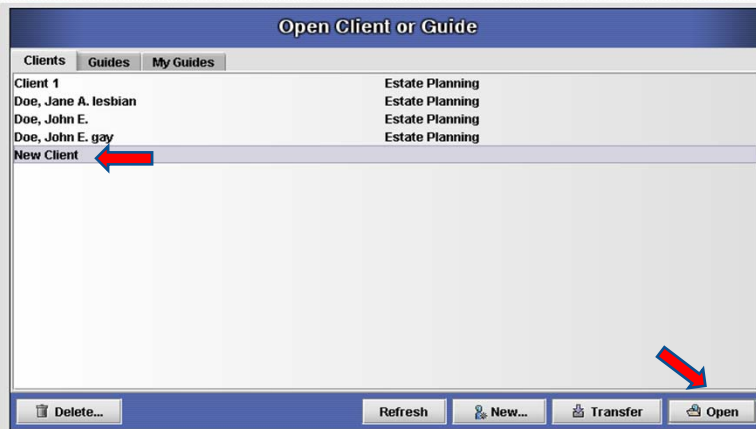


How To Create Input Sheets In DPS

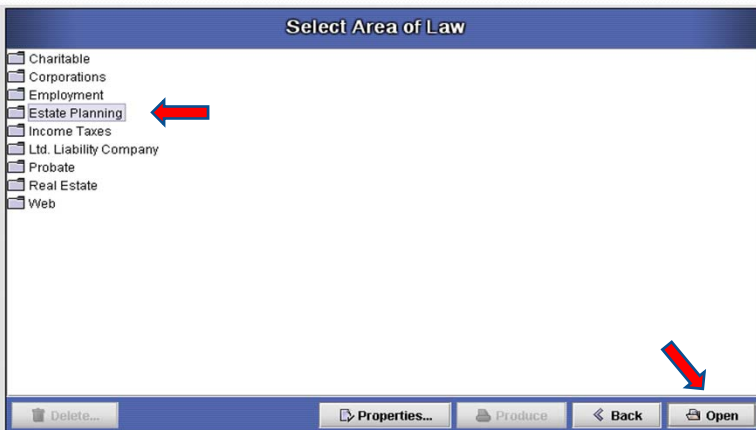
Purpose Of This Tutorial

- This tutorial will show you how to create Input Sheets to help you collect the necessary client information.
- You can also create Input Sheets which show the client information you have entered to assist you in reviewing that information.

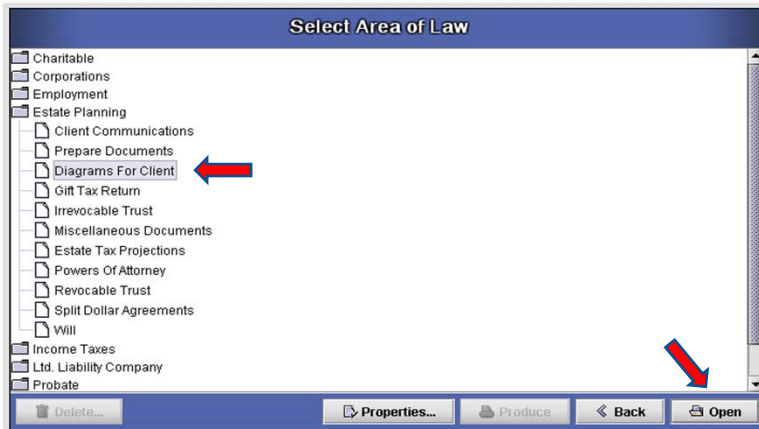
Log in to DPS 8.0
Create a new Client
Select the new Client then Open



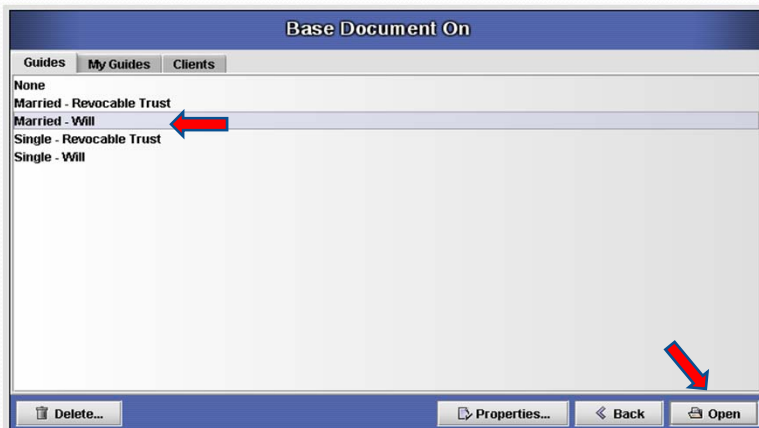
Select an Area of Law such as Estate Planning
Select Open



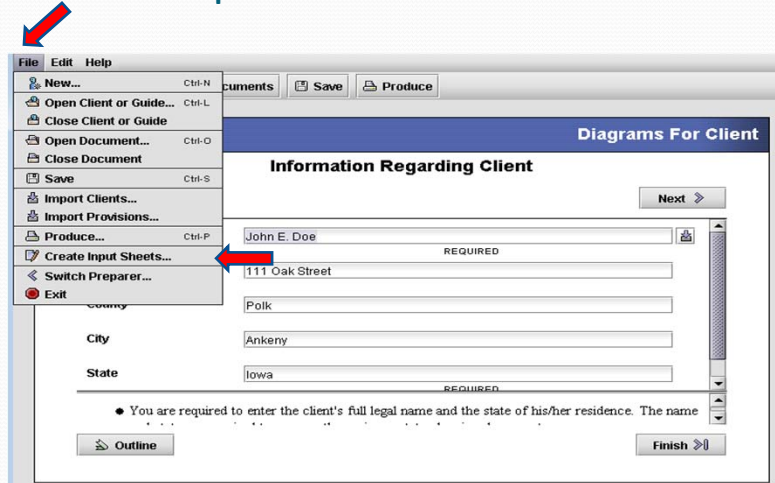
Select the desired Document
Select Open



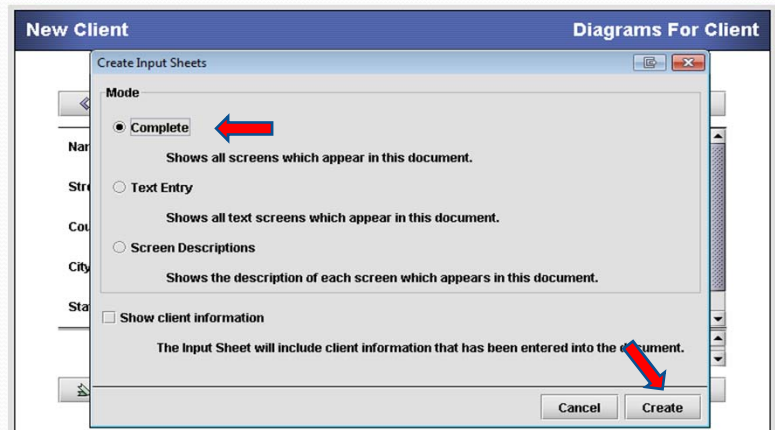
Select Guide on the Base Document On Screen
Select Open



Select File
Select Create Input Sheets



Select Complete then Create



The Input Sheets will be created
These Input Sheets will help you collect client information

Diagrams For Client

New Client

4. Information Regarding Client
Name Of Client -- _____
Street Address -- _____
County -- _____
City -- _____
State -- _____

5. Which State Law Should Apply (Select One)
 Iowa - Residence Of Name Of Testator
 Iowa - State Law Originally Selected

15. Documents For Client
 Last Will
 Financial Power
 Health Care Power
 Living Will
 Tangible Personal Property List
 Revocable Trust
 Irrevocable Trust

16. Information You Wish To Complete Or Modify
 Client And Family

You can also Show client information to review input for an
existing Client
You can also show just the Text Entry Screens

Diagrams For Client

New Client

Create Input Sheets

Mode

Complete
Shows all screens which appear in this document.

Text Entry ←

Shows all text screens which appear in this document.

Screen Descriptions
Shows the description of each screen which appears in this document.

Show client information ←

The Input Sheet will include client information that has been entered into the document.

Cancel Create

The Input Sheets will be created
These Input Sheets will show the client information you
have entered for you to review

Diagrams For Client

Doe, John E.

4. Information Regarding Client
Name Of Client -- John E. Doe
Street Address -- 100 Main Street
County -- Polk
City -- Des Moines
State -- Iowa

15. Documents For John E. Doe
 Last Will And Testament
 Durable Power Of Attorney (Financial)
 Iowa Durable Power Of Attorney For Health Care Decisions
 Declaration Relating To Use Of Life-Sustaining Procedures
 Tangible Personal Property List
 Revocable Trust
 Irrevocable Trust

16. Information You Wish To Complete Or Modify
 Client And Family
 Preparer
 Provisions Of Last Will And Testament
 Provisions Of Revocable Trust
 Provisions Of Irrevocable Trust
 Provisions Of Powers And Declaration Relating To Use Of Life-Sustaining

**For additional assistance call or email
Xan Taylor
Advanced Logic Systems
1-800-454-7703
support@dps8.com**