

Volume Enhancements Included in this Update

This update contains hundreds of revised forms, almost 100 new forms, and deletions of outdated forms. Many of the revisions are for the **2010 mid-year revision of the Judicial Council Forms (JCFs)**.

Attorney-Client Matters – We updated four attorney fee agreement forms pursuant to California Rule of Professional Conduct 3-410, allowing for the disclosure of personal liability insurance to the client.

Business Transactions Solution - We updated the *Directors', Officers' and Principal Shareholders' Questionnaire* form.

Family Law – We added one new JCF and updated 13 JCFs; added 29 new mandatory local forms from various counties for alternative dispute resolution, mediation, and fee statements of the mediator or arbitrator; updated 63 other local forms for various counties; and updated the FL 685, *Response to Governmental Notice or Motion or Order to Show Cause (Gov)* form to enable it to be assembled by either petitioner or respondent. Finally, we modified three forms pursuant to customer requests and suggestions.

Conservatorship – We updated one JCF, updated two forms, and modified one form pursuant to a customer request.

Criminal Defense – We updated five local forms pursuant to county updates and added 10 new mandatory local forms.

Federal Civil Litigation – We updated seven forms, including two Administrative Office forms with minor changes pursuant to the AO update. Three other changes are pursuant to Central District of California updates. We removed one Southern District of California form and replaced it with a similar form.

Federal Criminal Defense – We revised the 10-027a form, *Waiver of Rule 5 and 5.1 Hearings* (AO Form 466A) pursuant to an Administrative Office update.

Guardianships – We updated two local forms and modified five forms pursuant to customer requests and suggestions.

Juvenile Law – We updated 13 JCFs and removed nine outdated JCFs, updated one local form, and tweaked the assembly logic in the proof of service

(continued on page 2)

Helpful Hints about this Installation

This update installation is very different from those of the past because of the database enhancement discussed below. Here are a few quick hints to assist you:

- Time your installation for the last task of the day
- The installation is lengthier and will require a reboot/restart
- Leave the CD in the computer during the reboot
- Be certain that you install on the server for a network installation
- Be certain that you are logged in as an administrator

For an explanation of the above hints as well as information about system messages you may encounter during the installation, please visit:

www.prodoc.com/install-2010/

ProDoc and SOS Database Enhancement Released

When you install this update, you are beginning the process of updating your ProDoc database with a more robust technology.

During the installation of this update, it may replace the existing database engine with the new database technology. This technology is more likely to continue to perform correctly through situations such as:

(continued on page 2)

Your ProDoc Installation KeyCode Is on the Shipping Envelope

You will need a 20-character **KeyCode** to install this update. You'll find it on the envelope in which the CD shipped.

We strongly encourage you to keep the shipping envelope in a safe place so you have your KeyCode available when you install the update.



(Volume Enhancements continued from page 1)

forms.

Landlord and Tenant – We added one new JCF and updated another; added 10 new forms, including various Memorandums of Costs, a 30 day notice to quit, and two new mandatory local forms; modified seven forms pursuant to customer requests. Finally, we updated 10 local forms in accordance with county changes.

Litigation – We added 15 new JCF, updated 21 JCFs, and removed four outdated JCFs; modified 11 forms pursuant to customer requests; updated 30 and added 21 new mandatory local forms in accordance with county changes.

Probate – We updated 77 local forms and added one new local form in accordance with county changes. We also tweaked the assembly logic in two forms. Finally, we removed one retired form.

Real Estate – We added back a signature line for the settlement agent for the three versions of the HUD-1 forms, updated 264 local forms in accordance with county changes, and we made minor assembly logic fixes to five forms.

Worker's Compensation – We updated almost 30 forms and removed thirteen Vocational Rehabilitation forms that are now obsolete.

Lipman's Wills & Trusts – The revisions to this volume include:

1. Modified and improved the fee agreements.
2. Added a new form to revoke existing revocable trust.
3. Enabled you to draft an unlimited number of deeds simultaneously.
4. Improved and renamed the Memorandum Regarding Transfer of Accounts forms.
5. Added a new options to irrevocable trusts that contain Crummey withdrawal rights.
6. Modified pet trust language relating to the early termination of uneconomical trusts.
7. Removed the Widow and Orphan format settings from every form.
8. Revised the no-contest clauses language in the wills and revocable trusts.
9. Modified and improved the tax clauses found in most wills and revocable trusts.
10. Enabled trustee to make an election regarding S stock.
11. Modified the Assignment of Property section in Revocable Trust forms.

(Database Enhancement continued from page 1)

- minor degradation of the operating environment caused by fluctuating electrical power conditions,
- other hardware or network interference,
- under catastrophic failures such as a complete loss of power, hard drive failure, or
- interruption of network connections between workstations and the file server.

We believe that the improved reliability will greatly reduce any down time you may experience in the event of database issues.

We also expect that the new technology will continue to perform responsively even as the database load increases through the addition of more users or as greater amounts of client and case data are stored.

What to Expect During the Installation Process

During the installation process the software will verify the integrity of the data in your existing ProDoc/SOS database. If no issues are discovered, your data will be converted to the new database format and the installation of the update will proceed in the normal fashion.

Your data will not be converted to the new format and the update will continue in the normal fashion if an issue is identified during the installation process. However, the program will alert us that there is an issue and our Customer Support team will contact you so they can assist with the completion of the database conversion.

Your data will not be visible to us at any point during this conversion process. Your data will be automatically backed up on your computer during the conversion process and we will not have access to it.

And, none of your completed documents will be affected. Your documents completed in ProDoc are saved in a completely different directory outside of this conversion.

Where/Who to Call for Assistance

If you experience any issues or if you have questions about this process, please contact our Technical Support team at 800-759-5418, option 3.

View the Detailed Form Changes

To view the changes to specific forms:

- Open ProDoc and click on **Help ► About the Volumes**. Then click the area of law.
- Click on the **Change History** link and you will see information about the changes made to each form in the volume for this update.