

# ProDoc Tech Tip

## Creating Custom Intake Forms

Many ProDoc volumes contain generic Intake Sheets that you can print using the usual document assembly method. You'll find them named Client Questionnaire, Client Information Worksheet, Profile, etc.—depending on the volume. They are quick and easy to generate but they are generic. Of course, you can choose to generate one and then edit it to fit your requirements.

Another option is to create your own custom Intake Forms using the Print Worksheets feature in ProDoc. Using the Print Worksheets feature enables you to review all of the questions in ProDoc for a particular form or form set, use any of those questions, and then add your own questions for your custom intake form. You can then save your Custom Intake Sheet in ProDoc, if you wish, for easy access.

### Print the Worksheet(s)

Perform the following steps to print worksheets:

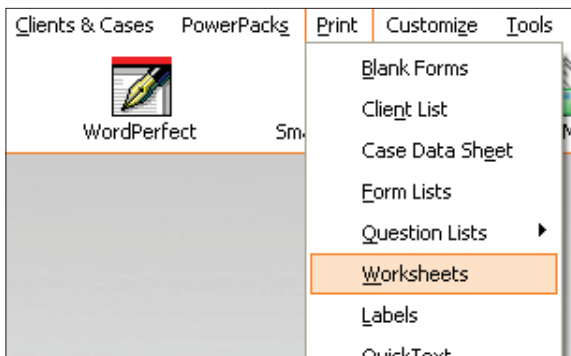


Figure 1. Print Worksheet

1. From the Main Menu, click **Print►Worksheets** (Figure 1).
2. Choose one of the five report-types by clicking the button next to the desired type (Figure 2).

**a. Assembly Questions** are number-based questions, Yes/No questions, and multiple choice questions. They will appear in the pop-up windows during the first phase of an assembly session.

**b. Merge Questions** are the fill-in-the-blank questions that will mostly appear during the second phase of the assembly where you see a preview of the document.

**c. Custom Merge Questions** creates a “custom” worksheet that contains only those merge questions that would be asked for a specific set of answers to the assembly questions. For instance, using this option for a divorce petition would cause ProDoc to ask how many children there are. If you answer zero, then the worksheet will only include questions that pertain only to couples without

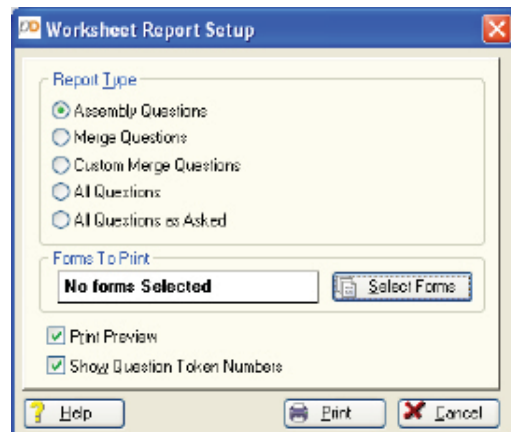


Figure 2. Select Report Type

children. This option also lets you use the answers you previously entered for a case as default answers to the assembly questions.

**d. All Questions** prints a list of all questions asked for the selected form(s).

**e. All Questions as Asked** prints a list of all questions for the form(s) in the order asked.

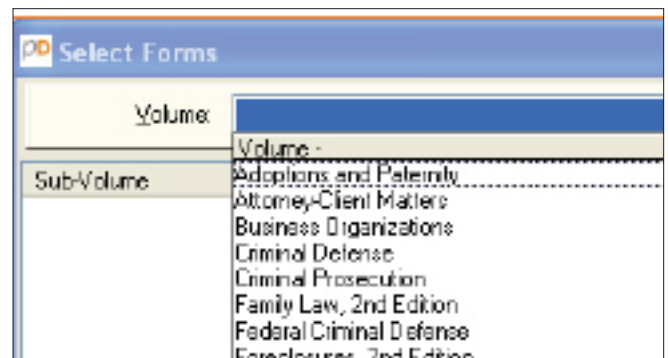


Figure 3. Select Volume

3. Click the **Select Forms** button (Figure 2) to reveal a list of your ProDoc volumes (Figure 3). After selecting the appropriate volume you go immediately to a list of all forms in that volume (Figure 4).

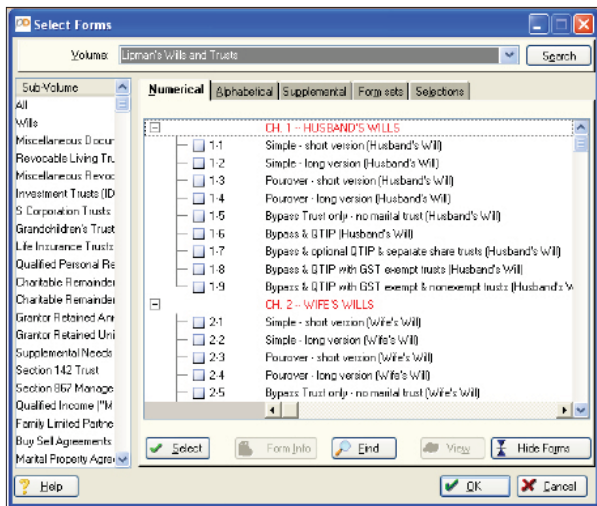


Figure 4. Select Forms

4. Basic functions of the **Select Forms** window that appears are:

- a. You can find and select one or multiple forms from the volume you select.
  - i. You can choose from the sub-volumes on the left; the default is **All**.
  - ii. You can also display the list in **Numerical** or **Alphabetical** order by selecting the tabs.
  - iii. After you've added **Supplemental forms** to a volume, you can find these by selecting the **Supplemental** tab.
  - iv. Use the **Form Sets** tab to add the forms from any special sets you have created to the list of forms to print. If you have not yet set up any special sets, you can do so by clicking the **Set up form sets** button.
  - v. Click the **Selections** tab to display only the forms you have selected.
- b. You can research the forms further:
  - i. Click the form title to select the form.
  - ii. Click **Form Info** to see discussion about the highlighted form and/or **View** to see the form.
- c. You can click **Find** to search for a form by a word or phrase in either the title only or in both the title and the form. You can flip through instances using the **Find Previous** or **Find Next** buttons. Unchecking the **Search form titles only** option enables you to search in titles and in the content of the forms.

5. After selecting the form(s) for which you want a worksheet, click **OK**.
6. The **Worksheet Report Setup** reopens (Figure 5).
7. If you chose **Custom Merge Questions**, you may click the **Select Case** button to select a specific case before proceeding. While not required, selecting a case enables you to save the answers you provide in the selected case file.

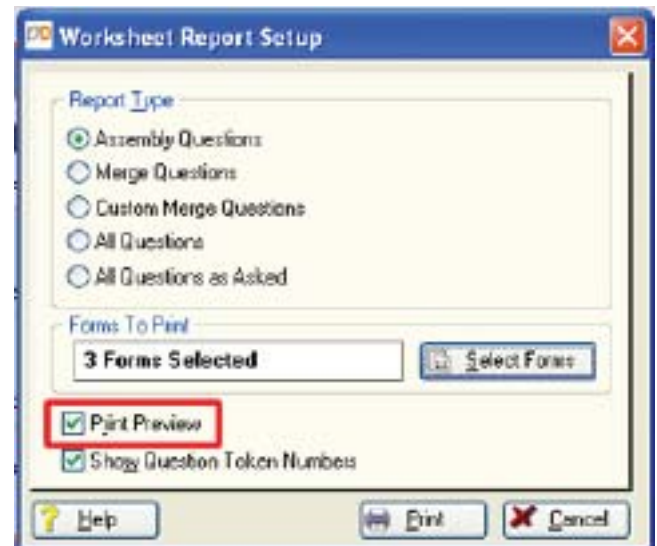


Figure 5. Make Final Choices

- By default, the box labeled **Show Question Token Numbers** is checked. These numbers are assigned by ProDoc to identify the token questions and control certain other variables. Uncheck this box if you do not want to print these token numbers. In most cases, you do not need the tokens.
8. If you chose **Custom Merge Questions**, the **Show Assembly Questions** selection box is displayed. You may click this box to print the questions that will be asked during assembly of the form.
  9. Make certain that the **Print Preview** box is checked. You will not be able to create your list if this is not checked.
  10. Click **Print**. If you are producing a report of **Custom Merge Questions**, you will be prompted to answer questions before printing. When you are finished, the **Report Destination** window appears.
  11. Select your printer and click **OK**.
  12. Because you earlier selected the **Print Preview** option, a preview of the worksheet will open (Figure 6).
  13. This particular list of questions is 14 pages long. You can manually preview them on the screen by scrolling through each page using the page selector shown in **6A**.
  14. Click the **T** icon, **6B**, to save the list of questions as a text file.

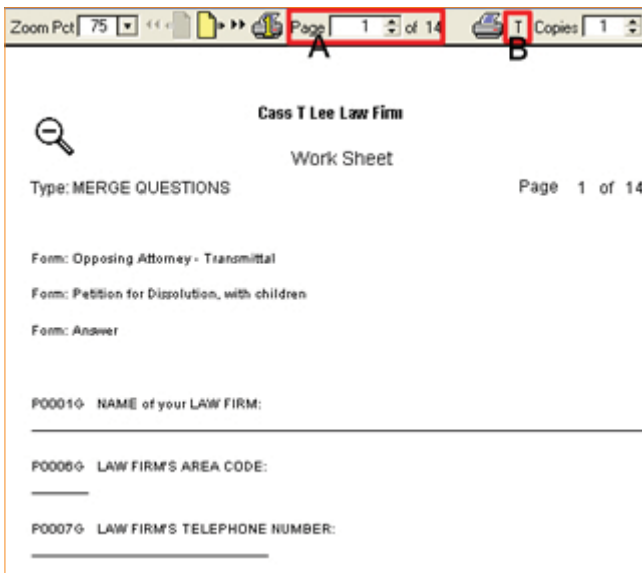


Figure 6. Preview Worksheet Questions

5. Select the file type of **Text file (\*.txt)** as shown in *Figure 8* and you will now be able to view and select your saved list of Worksheet questions.

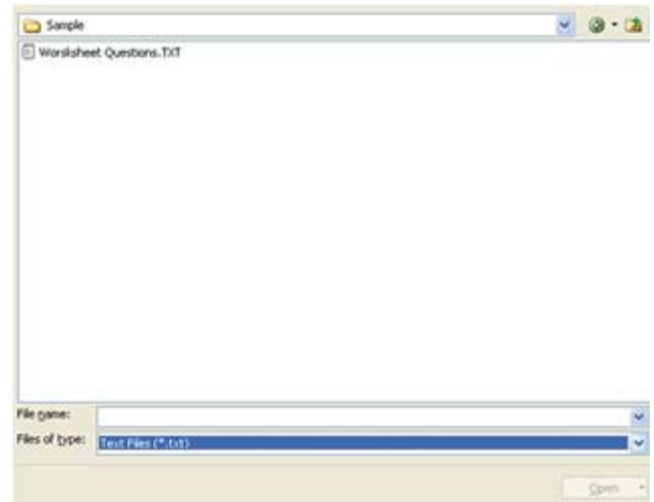


Figure 8. .txt Files Now Display

15. Using standard Microsoft® Windows procedures, name and save the .txt file wherever you wish on your computer or on your network. Just be sure that you can easily find it.

### Create Your Custom Intake Form

1. Open your word processor.
2. Navigate to the file containing the Worksheet questions that you saved.
3. Your word processor will probably default to searching for files matching its native file type. i.e. Corel® WordPerfect® will default to .wpd file types while Microsoft Word will default to searching for .doc or .docx file types.
4. Click the drop down in the **Files of type** field to display all of the file type options as shown in *Figure 7*.

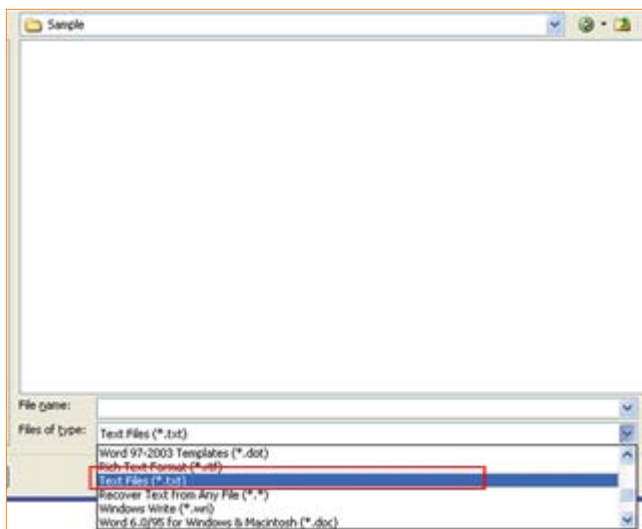


Figure 7. File Type Options Displayed

6. Copy those questions to your clipboard, paste them into a new word processor and begin editing to create your customized intake form.

7. You can also save your completed Custom Intake Form in ProDoc to find it easily. This would be considered to be a Supplemental form and you can learn how to add it to ProDoc at: <http://tinyurl.com/pd-suppforms>

### Additional Resources

For more help with printing worksheets or creating your custom intake sheets, you can:

- a. Call our Technical Support team at 800 759-5418.
- b. Call our Training Team at 800-759-5418 for a personal training session on this topic.