

## ProDoc February Update for 12 Volumes

**We're proud to send you this update containing 54 new forms and 560 changed forms in 12 volumes.**

### Family Law

This volume contains 44 new forms and 243 changed forms. We incorporated changes made by the 2006 Supplement to the *Texas Family Law Practice Manual 2nd ed.*<sup>1</sup>. Major changes include a new chapter on Parenting Plans and Parenting Coordinators. Form 100-23, Parenting Plan has been replaced with the State Bar's Parenting Plan, form 13-1. This Parenting Plan includes all of the provisions provided by the State Bar as well as all of the provisions included in Form 100-23.

Substantial changes were made to the Temporary Orders for Divorce and the Final Divorce Decree and to the temporary orders and final orders for a SAPCR. Additional modifications include several new optional possession provisions for Easter, Memorial Day, Labor Day, and Halloween. Optional provisions have also been included for summer camp, child care, and religious upbringing. Settlement of Future Disputes and provisions for the Changing Needs of the Children have been extensively revised.

Passport provisions are now completely optional. New parenting coordinator provisions have also been added to these orders. New forms to seek visitation of a sibling or to modify an existing sibling access order have been included as well as a Petition in Intervention for an Aunt or Uncle.

### Adoptions

We incorporated into this volume changes made by the 2006 Supplement to the *Texas Family Law Practice Manual 2nd ed.*<sup>1</sup>, updating 19 existing forms and adding one, the new Medical History Report. Changes to existing forms included adding a provision ordering a medical history report in the termination forms, and modifying the types of court ordered representatives offered for each form.

In addition, the orders adjudicating parentage were heavily modified to include additional options from the parenting plan, such as holidays and extracurricular activities, specifics regarding doctors and medications that will be used for the child, and how future disputes will be handled.

### Litigation

We revised 30 forms in order to add language to support referrals by the Houston Lawyer Referral Service and made other minor text changes.

### Lipman's Wills & Trusts

Mr. Lipman revised more than 180 forms in the update.

In the Medical Power of Attorney forms and the Combo Medical Power of Attorney & Directive to Physician forms, a place for the witnesses to sign has been added to the Attached HIPAA Release (which can be added at the drafter's option).

In four tax-planned, husband and wife jointly created revocable trusts, you can now draft the trust agreement so that each spouse has a different set of beneficiaries, and you can also now add specific bequests that are made from the Husband's share of the trust property upon his death, whether he dies first or second, and/or from the Wife's share of the trust property upon her death, whether she dies first or second.

You are now able to choose whether you want to refer to the creator of a trust as: *Grantor, Settlor, or Trustor.*

The following sentence has been added to the tax-planned will forms: "The trusts created under this Will shall be irrevocable."

Numerous changes were made to the Agreement of Limited Partnership (Form 41-1) to account for changes in the law.

Changes have been made to the transmittal letters allowing you to list other estate planning options that your client might have

implemented, but did not. The purpose of the additional text is to establish that you did advise your client about other available estate planning options.

### Probate

One form was modified to allow for bond language in all situations. Previously bond language was removed for certain types of clients.

### Real Estate

We incorporated changes made by the 2006 Supplement to the *Texas Real Estate Forms Manual*<sup>1</sup>, which involved updating 57 existing forms and adding 9 new forms, including an insurance and indemnity agreement and forms necessary for foreclosure of a home equity loan. In addition, 24 forms were changed based on suggestions from our subscribers and updates to agency forms. These enhancements include modifying the questions pertaining to the reservation of mineral estates in deeds, so that the provisions can now work in conjunction with each other, allowing for the promissory note to be prepared on behalf of the second lender, and adding the capability for multiple personal representatives in the Administrative Deed. The option of including a notice of confidentiality rights above the title was left in most forms that may be recorded, in accordance with statute.

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## Watch for Our Legislative Update in August

This is a legislative year and that means it will be time for another legislative update in August. It is always a massive project for our attorney-programmer team to get the update out on time. Based on past experience, we'll review literally thousands of bills and update hundreds of forms in order to provide them to you prior to their September 1, 2007 effective date.

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### Criminal Defense

We added information on the Houston Lawyer Referral Service to the fee agreement letter. Additionally, we removed a redundant form. Finally, we added a certificate of service to a form.

### Business Organizations

We added information on the Houston Lawyer Referral Service to two fee agreement letters.

### Foreclosures

We added information on the Houston Lawyer Referral Service to the fee agreement letter.

### Landlord-Tenant

One form was affected as we added required text from the Texas Rules of Civil Procedure to the Notice of Filing of Possession Bond.

### Criminal Prosecution

We removed a redundant form.

### Attorney-Client

We added language to five forms to support referrals by the Houston Lawyer Referral Service.

## eFiling From ProDoc

As a ProDoc customer, you can eFile directly from ProDoc into the TexasOnline system for eFiling into the state courts. There are several advantages of eFiling from your ProDoc software:

- ProDoc's client and case data flows into the appropriate eFiling fields-saving you time.
- An easy-to-use scanner interface is provided for adding third party documents to your eFilings.

If you are already registered with TexasOnline eFiling, you probably know that signatures are not required on documents executed and filed by your firm. Once you are finished producing a ProDoc document, it is ready to eFile. If you need to add a third party document to your filing, you may need to scan the document to add it to your computer.

If you are not yet registered to eFile in Texas, go to [www.prodocefile.com](http://www.prodocefile.com), click the Register for eFiling link, and complete registration before following the steps below.

Please note that in order to eFile from ProDoc, you must have administrator rights on the computer. Consult your computer technician if you aren't sure whether or not you have these rights.

### To eFile from ProDoc:

**1.** Click eFile on the main menu and select eFile Documents. The Preparing for eFiling window opens. The other choice, eFile Manager, simply opens the ProDoc eFiling

website, but doesn't allow you to use case files.



**2.** Click the Select Contact/Case button to select the case you wish to use.

**a.** Click the Case Documents button to select a completed case document to file. Highlight the case document and click the Select button.



**b.** If the document isn't located in your case files, click the Browse button to locate the document and click Open to select it.

**c.** If you need to scan a document to eFile, click the Scan button. Follow the procedures on succeeding windows to add the document to your computer.

**3.** The document you select is added to the Preparing for eFiling window. If you need to add attachment(s) to your lead document, follow step 2, but use the buttons in

the lower half of the window.



**4.** Click the OK button at the bottom of the window. After your documents and information are processed, the ProDoc eFiling login page will appear.



**5.** ProDoc will automatically convert your documents to the required PDF format, start your eFiling, add your documents and fill in the required fields when you log in to the ProDoc eFiling website.

**6.** Continue with the eFiling process. Help links are available for each page. Your document(s) will already be selected, converted and entered for you on the Attach Documents page.

We hope you take full advantage of eFiling from ProDoc. If you have any questions about eFiling or suggestions for us, call us at **1-800-759-5418**.