Wills For Heroes
HotDocs Instructions

1. Turn on Computer by pressing the power button on the top left corner of laptop.
2. When screen comes up double click on the HotDocs icon.
3. HotDocs will open. On the left-hand side of the screen the 3 document templates will appear. Double click on the **Will template**.
4. An ANSWER FILE BOX will appear and state **New Answer File**, click **Okay.**
5. A CLIENT INFORMATION SCREEN will appear, begin entering information in the answer to each question.
   When you have answered all questions on the screen click **Next** at the bottom of the screen (you can also click on the next item listed in the left dialog box)
   Continue to enter information and go on to the **Next** screen.
6. The last screen is called END OF INTERVIEW. If you have left any question unanswered the 1st icon on the END OF INTERVIEW screen will indicate that. If you click on that icon it will take you to the 1st unanswered question.
   If you answered all the questions the 1st icon will be **Send the assembled document to Microsoft Word,** click this icon.
7. Microsoft Word will open with your assembled document. You can review the document on the screen quickly.
   Print the document and review it with your client.
8. If there are changes you can make them directly in the document or close the document and go back into HotDocs and change the answer on the correct CLIENT INFORMATION screen
   If the document is correct the printed copy will be the final document.
9. When the document is complete minimize the Word document screen. This will take you back to the HotDocs screen – click Close.
10. A box will come up stating **Answers have been changed during this session. The current file is New Answer File. Do you want to save changes**? Click **Save As.**
11. A SAVE ANSWER FILE box will open. In the **File Name** box enter the client's name and click the **Tab** key twice and then click **Okay**.
12. You will be asked if you want to save the assembled document click **Don't Save**.
13. You will return to the main HotDocs screen
14. Double click the **General Power of Attorney template**.
15. The ANSWER FILE box will appear. On the right click the icon that looks like a file folder, the **Open Answer File** icon. The name of your client should appear on the left hand side of the OPEN ANSWER FILE screen.
    Double click on the name of your client.
    The ANSWER FILE box will appear with the client's name listed in the box click **Okay**.
16. The CLINET INFORMATION screen will appear with any previous information included.
17. Continue completing the requested information and click **Next** on the bottom of the screen. Complete the rest of the information screens continuing at the end of each screen by clicking **Next**.
18. When complete you will again be at the END OF INTERVIEW screen.

19. If the END OF INTERVIEW screen indicates you missed any questions click that icon and completed the needed information. If the information is complete click the **Assemble Document** icon.
20. Microsoft Word will open with your assembled document. You can review the document on the screen quickly.
    Print the document and review it with your client.
21. If there are changes you can make them directly in the document or close the document and go back into HotDocs and change the answer on the correct CLIENT INFORMATION screen
    If the document is correct the printed copy will be the final document.
22. When the document is complete minimize the Word document screen. This will take you back to the HotDocs screen – click Close.
23. Click **Save As** in the ANSWER FILE box. Click the Folder icon on the right and select the client's name and click it. The client's name will appear in the Save Answer File box click **Okay.** A box will ask **Do you want to replace the existing file?** Click **Yes**.
24. You will be asked if you want to save the assembled document click **Don't Save**.
25. You will return to the main HotDocs screen.
26. Double click on the **Advanced Directive for Health Car Template**.
27. The ANSWER FILE box will appear. On the right click the icon that looks like a file folder, the **Open Answer File** icon. The name of your client should appear on the left hand side of the OPEN ANSWER FILE screen.
    Double click on the name of your client.
    The ANSWER FILE box will appear with the client's name listed in the box click **Okay**.
28. The CLINET INFORMATION screen will appear with any previous information included.
29. Continue completing the requested information and click **Next** on the bottom of the screen. Complete the rest of the information screens continuing at the end of each screen by clicking **Next**.
30. When complete you will again be at the END OF INTERVIEW screen.
31. If the END OF INTERVIEW screen indicates you missed any questions click that icon and completed the needed information. If the information is complete click the **Assemble Document** icon.
32. Microsoft Word will open with your assembled document. You can review the document on the screen quickly.
    Print the document and review it with your client.
33. If there are changes you can make them directly in the document or close the document and go back into HotDocs and change the answer on the correct CLIENT INFORMATION screen
    If the document is correct the printed copy will be the final document.
34. As all the documents are complete and have been reviewed by the client you are ready for them to be executed by the client. Request two witnesses and a Notary come over to your station. Introduce your client to the witnesses. Ask the client, "do you wish to execute your Last will and Testament, Power of Attorney and Advanced Directive?" When the client indicated that they do, begin the signing process. The client will need to initial each page of the Will and then sign where appropriate and the witnesses will need to sign followed by the notary. The client will then need to sign the Power of Attorney, followed

by the witnesses and then the Advanced directive. The Advanced Directive is witnessed but is not notarized.

35. If the client has named proxies in the Advanced Directive remind the client that the proxies will need to sign the document and place post-it notes indicating the spaces to be signed.
36. Place all the executed documents in a Wills for Heroes folder and give it to the client.
37. **Keep the client's complete questionnaire and give it to the Clinic supervisor.**
38. Shred any incorrect documents.
39. Delete the Client's Answer File from HotDocs. Also complete any Documents save in Word.