

MINNESOTA **CLETRUST**SM

Automated Document System

Getting Started

A guide to help you quickly
learn your way around the system and
start assembling your trust documents.

Includes helpful tips, shortcuts and notes.



Minnesota Continuing
Legal Education

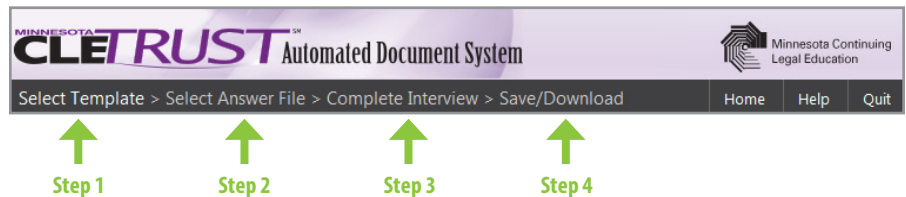
651-227-8266 or 800-759-8840

Assembling Your Trust Documents

Assembling is the process of merging a template (blank form) with information that you, the user, enter into an answer file. The steps for assembling a document are:

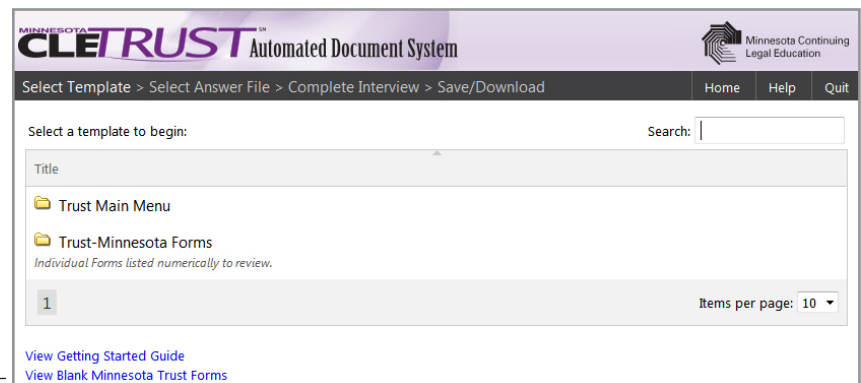
- 1) Select a **template** (blank form).
- 2) Select an **answer file**.
- 3) Complete the **interview** (a questionnaire that prompts you to enter template-specific information into an answer file).
- 4) **Download and save** your answer file and assembled document to your own computer.

As you work through the process of assembling a document, the step you are on will be highlighted in the black bar at the top of the window.



1) Select a Template

Upon entering the **CLETRUST** Automated Document System you see the **Select Template** (home) screen.



TIP:

Click "View Blank Minnesota Trust Forms" to see blank samples of each form.

NOTE:

After selecting the Trust-Main Menu option, you will be directed to choose an answer file (see step 2) before entering the Main Menu where you can choose the group or groups of forms you wish to assemble.

"Select Template" screen

- Click **Trust-Main Menu** to go to the Trust Main Menu where you can select multiple forms to complete various trust tasks. You will be able to choose from the following: Accounting Forms • Terminating a Trust • Trustee: Remove/Resigning Trustee • Charitable Trusts and Real Estate Actions • Decanting a Trust • Real Estate Deeds and Transfer Documents. (The option to select a single form is also available through the Trust-Main Menu.)

TIP:

On the list of forms, use the search box in the upper right-hand corner to quickly find forms by keyword or 3-digit form number.

- Click **Trust-Minnesota Forms** to see a handy reference that lists all available forms and their corresponding form number. You can click on a form number to select a single form to assemble. (The option to select a single form is also available through the Trust-Main Menu.)

2) Select an Answer File

After you've made your selection on the "Select Template" screen, you will enter the **Select Answer File** screen.

IMPORTANT!

Answer files and assembled forms are **NOT** saved on our server. You save them to **your own computer**. Keep in mind that you may need to save your files to a flash drive or disk if you wish to resume work on a file at a different computer.

Answer files are saved with an **.anx** extension.

"Select Answer File" screen

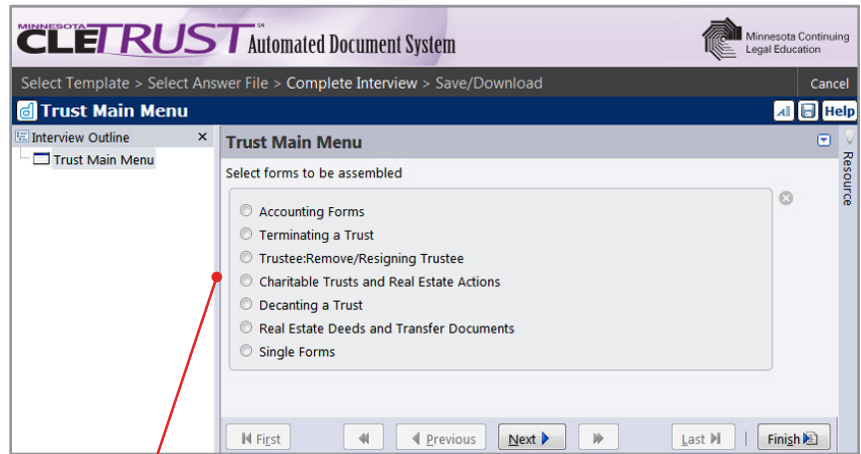
- Select **Begin using a new, empty answer file** to create a brand-new answer file.
- Select **Use a HotDocs answer file from my PC** to open an answer file you have saved on your own computer. Click the **Browse** button to locate a specific answer file on your computer.

Click **Continue** to begin the "interview."

3) Complete the Interview

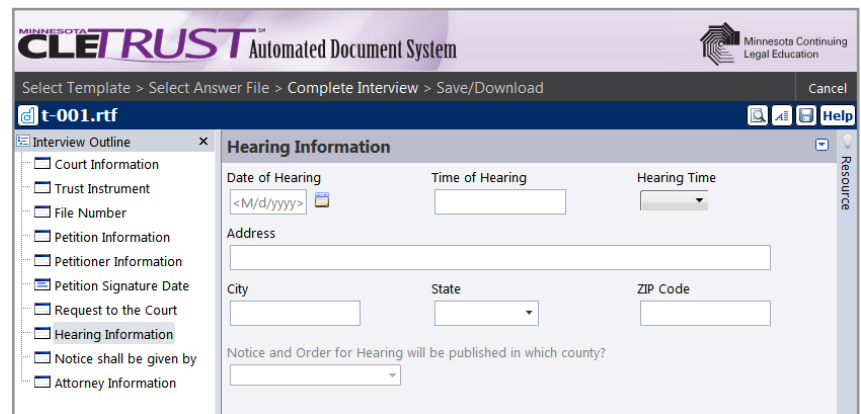
After you've made your answer file selection, the **Complete Interview** screen appears and the interview process begins. During the interview you will answer questions pertinent to the selected templates (blank forms). The answers you provide in the interview will automatically be inserted into the template. The questions asked in the interview are specific to each template and will change based on the template selected by you.

If in Step 1 you chose the "Trust-Main Menu" option, you will first be given an opportunity to select the group of forms that you wish to assemble. Please note that you can also choose single trust forms from this screen.



**Choose the group of forms you wish to assemble.
Or choose the Single Trust Form option.**

If in Step 1 you chose a single form from the Trust-Minnesota Forms list, you immediately will be taken into the interview for the specific form that you chose.

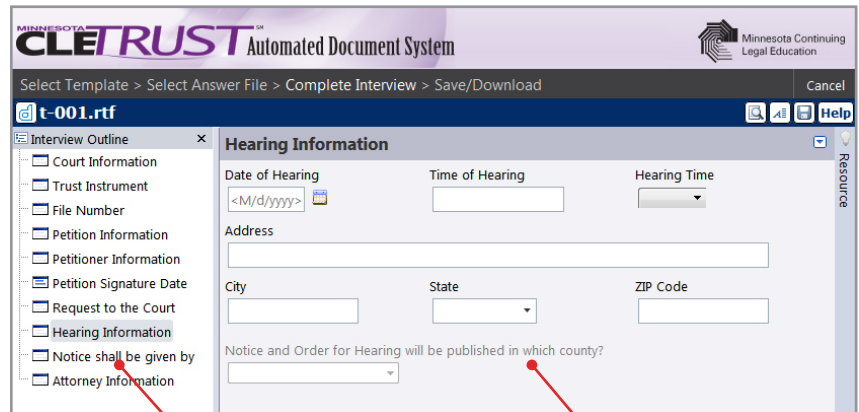


Sample "Complete Interview" screen

The **Complete Interview** screen contains two panes. The left-hand side of the screen is the *Interview Outline* pane. The right-hand side of the screen is the *Dialog* pane.

- The *Interview Outline* pane
This pane provides an overview of the questions you must answer to complete a selected form. It lists all the groups of questions in the interview and allows you to quickly move from one group of questions to another in the interview. (Each group of questions is called a dialog.) When you click the name of a dialog in this pane, the questions included in that dialog appear in the *Dialog* pane.

- The **Dialog** pane
This pane displays the questions included in a specific dialog. The current dialog will be highlighted in the *Interview Outline* pane. The *Dialog* pane is where you enter your answers to the questions.

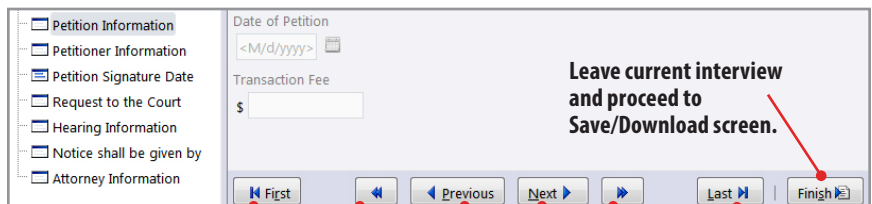


This is the “Interview Outline” pane. It displays the dialogs (groups of questions) that must be answered in order to complete the interview and assemble a form.

This is the “Dialog” pane. It displays the questions you need to answer and provides the spaces for you to enter your answers.

Navigating around the “Complete Interview” screen:

The navigation bar located along the bottom of the *Dialog* pane lets you move between dialogs.



Go to first dialog in this interview.

Go to previous *unanswered* dialog in this interview.

Go to previous dialog in this interview.

Go to next dialog in this interview.

Go to next *unanswered* dialog in this interview.

Go to last dialog in this interview.

Understanding the icons in the “Interview Outline” pane:





The following icons are used in the *Interview Outline* pane to show the answered status of questions. These can help you determine which dialogs still contain questions that you need to answer.




None of the questions in the dialog are answered.

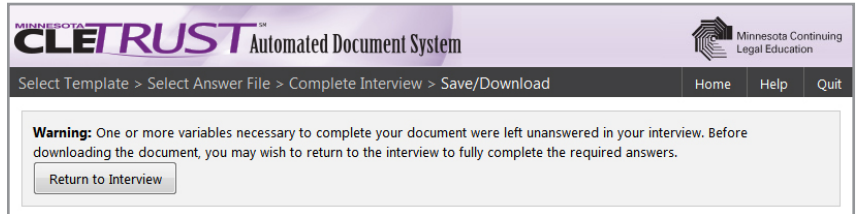


A new repetition of a repeated dialog in which none of the questions are answered.

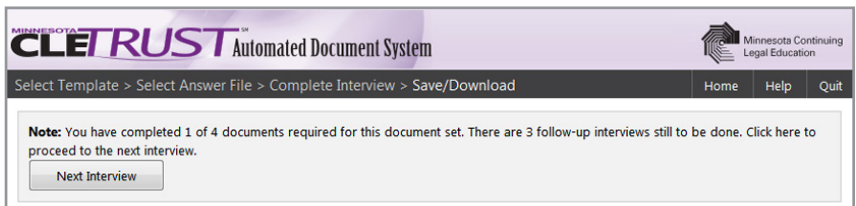
-  At least one of the questions in the dialog is answered.
-  All required questions in the dialog are answered.
-  The dialog contains at least one unanswered required question.
-  The dialog cannot be answered until required questions in previous dialogs are answered.

Once you have completed all of the questions in each dialog, click Finish.

If you have left one or more questions unanswered a warning will appear along with a **Return to Interview** button. You may click this button to return to the interview to complete the unanswered questions. The dialogs containing unanswered questions should be marked with the  icon.



If you chose more than one document to assemble, you may see a **Next Interview** button. This button will appear each time you click Finish until you have completed all of the interviews required to completely assemble all of the documents you chose. This screen will indicate how many interviews you have completed and how many are still to be done. Click the **Next Interview** button to return to the interview process.



4) Download/Save an Answer File and Assembled Documents

IMPORTANT!

It is very important to download and save your answer file. You may need it to assemble additional documents or to recreate a document.

Remember, answer files and assembled documents are NOT saved on our server. You save them to **your own computer**. Keep in mind that you may need to save your files to a flash drive or disk if you wish to resume work on a file at a different computer.

WARNING!

Signing out or clicking the Home or Quit button or the "X" in the upper right-hand corner of the window will cause you to lose any unsaved answers! **Always save your answers before clicking any of these buttons.**

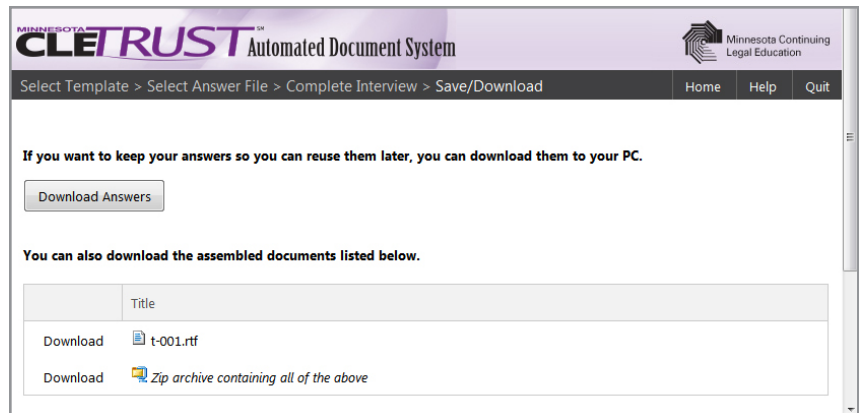
NOTE ON DOWNLOADING:

Newer web browsers default to storing everything downloaded from the Internet in a generic "Downloads" folder, bypassing the "Save As" prompt. It is usually possible to change this default setting, allowing you to choose where each answer file and form is stored. For complete information and instructions on how to change your download settings, consult your browser's "Help" section.

NOTE:

The forms used in this system were designed in Microsoft Word. You may be able to open your saved .rtf files in other word processors; however, some of the formatting may be lost.

Click the Finish button on the "interview" screen to go to the **Save/Download** screen. Once you have answered all of the questions in the interview appropriately, you can download and save the answer file and the assembled document(s) to your own computer.



"Save/Download" screen

- To save an answer file click the **Download Answers** button. In the gray "File Download" pop-up box, click Save. In the "Save As" box, go to the location on your computer where you would like to save your answer file. Rename your file under your client's name and click Save. **Your answer files must be saved with an .anx extension.**
- To save an assembled form, click **Download** next to the form. In the gray "File Download" pop-up box, click Open to view the form in a word processor or click Save to save the form. In the "Save As" box, go to the location where you would like to save your document. Name your file and click Save. **Assembled documents should be saved with an .rtf extension.** Saved documents can be opened in a word processor.

At this point, all of your work will be saved on your own computer. You can open, modify (if you wish) and print the completed forms right from within your own word processor.

Log Off

After you have assembled and saved your completed forms and answer file, simply click the **Quit** button in the upper right-hand corner of the screen to exit the **CLETRUST** Automated Document System.

If you wish to start a new answer file or new form, click the **Home** button in the upper right-hand corner of the screen to go back to the "Select Template" screen.