Forms and Document Assembly Programs

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Kathryn Bellman has been the Director of Continuing Legal Education for the Nebraska State Bar Association since January of 2001, and is responsible for both programming and publications. She is a 1981 graduate of the University Of Nebraska College Of Law and she was admitted to practice in 1981 and practiced law in Lincoln, Nebraska before joining the NSBA staff in 1988. She is also the Executive Editor of The Nebraska Lawyer magazine, the monthly bar journal. She is a member of the Nebraska State Bar Association, ACLEA, and the NABE Communications Section.

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Holly Garland Langworthy is the director of Publications at Minnesota CLE. She has been in publications for 12 years and was a Program Attorney for 2 years prior to that. Holly has been active as a presenter at ACLEA Conferences, Chair of ACLEA's Best Awards Committee and Chair and committee member of the Marketing Awards Committee. Prior to her great career in CLE, Holly practiced intellectual property law. She is married and has 2 kids, Morgan 20 and Stone 15.

SANPSHOT OF DOCUMENT ASSEMBLY SYSTEMS IN NEBRASKA

NEBRASKA PROBATE SYSTEM V

By Kathryn Bellman, Director of Continuing Legal Education, Nebraska State Bar Association

Nebraska Probate System V was developed in 2005-2006 in cooperation with Basha Systems, LLC. We created a comprehensive document assembly system out of our probate form book and provided a tool for twenty-first century lawyers who have come to appreciate document assembly for its efficiency, its ability to track and store information electronically, and its ease of use.

BASICS

At its most basic, a document assembly system provides a series of **templates**, coupled with a **document assembly software**, such as Hotdocs, to drive the delivery of the client information to the template, which is then output as a **Word document**. Probate System V was originally built on Ghostfill software, but we have switched to Hotdocs as the underlying assembly engine.

Document Assembly software assembles documents based on the client information provided in the master information file or interview. Hotdocs allows us to create interviews that guide the user through the creation of probate filings and related documents. Once the questions have been answered, Hotdocs inserts your answers into the selected form and assembles a final document.

NSBA Probate System V consists of several applications which lie like skins over the Hotdocs platform and contain the **interviews** and **templates.** Having the Hotdocs software on your computer will not interfere with any other program on your system including other Hotdocs applications like West's Drafting Wills & Trust Agreements ("DWTA") and AIA Contract Forms. If you have any questions, you can always contact Basha Systems.

Customization: Each user of Probate System V can set up his or her law firm profile the first time they use the system. Once that profile is created, the system will insert all appropriate firm / attorney information in appropriate places in any document generated. Likewise, the system allows you to work with one or multiple offices, different lawyers, paralegals, etc. Each Estate File must be assigned to an attorney (and/or co-counsel). Attorney Profiles must be created for each attorney who will or may be drafting documents using the system. Profiles can be created for as many attorneys in your Firm as you wish. However, if they never do any drafting (or signing) or documents, there is no need to enter them. Additional customization at the level of firm letterhead and stylesheets is also possible.

GENERATING DOCUMENTS – WHAT IS A MILI ANYWAY? (Answer: Master Information List).

People learning to use Probate System V find that they need to learn how to fill out the interview that collects the client information or "MILI" and ensure that the "fill-points" - those parts of the document to be generated where client information is provided, get filled in.

In training, the first question usually asked is "What is an unanswered fill-point and how does it affect the probate documents?" In short, fill-points are the points in a document where the interview answers are inserted. Different documents require different answers and not all answers in the probate file will be used in all documents.

There may be an instance or instances in which you, the user, do not know all of the answers necessary to complete a document. In that case, the user can enter the information he or she has, generate a document, save it, and fill in the rest of the information at a later date.

Users can also exercise the option in a form interview to print a "blank" version of the probate document. In that instance, all of the unanswered fill-points in the blank document will appear as blank spots, but the boilerplate text of the document will appear.

CREATING A NEW PROBATE FILE

The basic Probate System V software comes with four client file units (Please see appendix for an overview of the unit pricing structure). New units are purchased as needed. Each time you start a file for a new probate client, you use a new unit. All the documents created for that client are tracked and are a part of that unit. The unit stays open until you finally close your file.

Once you have opened a file from an unused unit in your unit manager, or you have clicked on the prompt to purchase a file, you will open the file and enter information to the file, including assigning a name to the file, the primary attorney and any other staff who will work on the file.

Once all this information is entered, you can close this part of the system and move on to the interested party interviews. This is where you will input client information into the MILI that will flow into your documents as you need them.

WHEN SHOULD I PURCHASE A NEW UNIT (PROBATE FILE)?

After you have purchased and created a probate file, you can open and use that file as much as you want. In fact, the more you open and use the probate files in PSV, the more value the system will have for you.

This brings up the question – "When should I purchase a probate file?" When Seth Rowland trains people to use PSV, he always says "About one minute after the decedent's daughter has informed your office that her dad has died and they need to probate the will." In other words, from the very beginning of the Probate. The ideal use of PSV would be something like this:

- Retrieve the will from the safe, open the PSV Probate File and enter all the information necessary from the Will.
- Get the EIN from the IRS, open your PSV Probate File and enter it in the EIN line.
- Get the financial papers from the daughter, open the Assets dialog and enter them.
- Get the list of parties, open the interested parties dialog and enter their information.
- Open the PSV file to get the phone numbers of two of your interested parties.
- Create the Probate petition.

In other words, your PSV Probate File can act as a far more efficient substitute for your old redweld system. No more shuffling through papers looking for a social security number! The bottom line is the bottom line – every time you open a PSV Probate File, you've spent $50.00. It's the same $50.00 if you use it every day of the "life" of the Probate or use it for a couple of petitions.

Using the File Manager to Review Documents

One of the nice features of a document assembly system is that it allows you to keep track of what you have produced in regard to a given case. All documents created by the system, by default, are placed into a documents folder with the same name as the name of the estate file. Once you access the estate file, you can see a list of all documents that have been generated for that estate.

CONTACT MANAGER AND INTERESTED PARTIES

Contact Manager: The contact information entered in the Contact Manager can be used program-wide for all units and should be populated with those contacts, such as newspapers or bank employees, and other attorneys which your firm uses as contacts over and over.

Interested Parties: The Interested Parties interviews are specific to each ESTATE FILE and do not copy across the system. They are those persons and companies who have a specific interest in an estate proceeding. An Interested Party record should be created for any person or entity (other than the Decedent) appearing in your probate proceeding. This would include the personal representative(s), spouses, ex-spouses, children, heirs, beneficiaries, creditors, trustees, trustors, grantors, grantees, etc. The system allows you to enter contact information, identify relationships to the decedent, and identify the individual's interest in the estate.

Because of the system's ability to track documents and information about interested parties, if can function as a simple case management system, allowing you to keep track of everything going on in a particular estate matter.

DOCUMENT ABSTRACTS

Legal Secretary and Attorney. The Document Abstracts tool that comes with PSV gives the user a way to both itemize and summarize the key terms of the testamentary documents. It contains a way to make sense of complex legal instruments and turn them into a catalog of key provisions, organized by category and interested party who may be affected by such provision. Over time, it may be this tool, above all, that you make the most use of.

Particularly, when the Probate first comes into the office, you will want to make an inventory of the key legal documents which will be governing the scope and direction of the probate proceedings. You will want to list the documents, identify the witness, take notes on the status, and inventory where such documents are stored.

The next and more vital step is to actually review those documents, preparing an abstract of each of the key provisions. Here, the system gives you a tool that includes a dynamic list of documents (from which the provisions are abstracted), a list of key categories, and a dynamic list of interested parties who are affected by the provisions. From this, you are given a comprehensive report of provisions, organized by document, by category, and by affected person.

You can access document abstracts from the estate file itself or from the template list.

00.020 Master Information List

00.022 Testamentary Documents Abstracts

00.023 Parties – Contact List

00.024 Parties – Contact Detail

MORE ON THE MASTER INFORMATION LIST

The Master Information List is a key part of the system, since this is where you enter all the client information that will flow into any document you generate through PS V document assembly.

The Master Information List or "MIL" (also known as the "MILLIE") is similar to the one you are accustomed to using with the printed probate manual. The main difference is that the MIL is now interactive and can be used to complete probate documents. The MIL is also broken into two distinct parts:

- **Basic Information** concerns information about the decedent, the decedent's family, the court proceedings and appointments, and the probate estate.

- **Taxes and Expenses** concerns the expenses of the estate and various itemized deductions and allowance that are included in the Nebraska Tax Inheritance Worksheet.

When one is beginning a probate, it is not necessary to fill out all of the MIL dialogs but the user must be sure to fill out at least the first four (**Decedent** details, **Will** details, **Estate Valuation for Bond** and **Estate & Court** details) in order to begin creating probate documents.

Entering Details About the Decedent

The first step you (or your staff) will take, when completing the MILI is to enter basic information about the decedent, such as names, titles, dates of birth and death, other names decedent may have used, domicile at time of death, etc. You will also be able to enter details about the decedent's occupation and whether he

[Screenshot needed]

You will also be able to enter **details about the death of decedent,** including place, details about illness or hospital, attending physicians, etc.

Will and Codicil Details

The **Wills and Codicils** interview asks the user to make some confirming statements necessary for programmatic use. It also allows the user to check that sufficient prior information has been entered and to return and create new interview profiles, where necessary. It allows you to enter information about the will, about any codicils that may exist, about whether a personal representative has been named in the will, and if the will has been previously probated.

[Screenshot]

Estate Valuation for Bond

If a bond is required for the probate, this dialogue provides for a rough evaluation of the estate for the purposes of determining the amount of the bond. If a bond is not required, you can check that no bond is required and skip this menu.

If a bond is NOT required

• Choose **No Bond Required.**

• Then **Specify reason why no bond is required**. This is a sentence fragment that finishes the sentence, "No bond is required because … "
[Screenshot needed]

If a bond is required

[Screenshot needed]

Information can be entered about the estimated value of real and personal property as well as income for the next twelve months

Designating Personal Representative(s) or a Special Administrator

These parts of the MILI allow you to indicate who has been named as a Personal Representative or a Special Administrator. This is critical information, since it will flow into many of the documents generated by the system.
[Screenshot needed]

Publication and Public Notice

This section allows you to indicate the date(s) of publication as well as the publication. The value of being able to track these details in your system should be apparent.
[Screenshot needed]

Ancillary Proceeding Interview

If decedent owned property outside of the state, you can indicate information about any ancillary proceedings. [Screenshot needed]

Safety Deposit Box Interview

This interview allows you to enter the bank(s) where decent had safety deposit boxes and also indicate whether or not the contents have been inventoried. [Screenshot needed]

Insurance Interview
This interview allows you to document whatever insurance policies were held by decedent and indicate to whom the benefits will be paid if not to the estate. [Screenshot needed]

Taxes And Expenses

Here you would list the relevant transfers before death, such as taxable gifts and events that may have occurred during decedent's life that could have tax consequences

Cataloguing funeral expenses and adjusting for social security death benefits

Listing the expenses of the final illness

Entering allowances and deductions

- Allowances and exempt property w
- Attorney fees and expenses – t
- Other administration expense
- Non-probate expenses
- Other deductions

Listing Unsecured Debts of Decedent
Documenting Charitable Devises or Pledges

Listing Relevant Transfers Before Death

Cataloguing Funeral Expenses

Itemizing Funeral Expenses

Adjusting for Social Security Death Benefits

Doctor, Hospital and Other Bills

Closing the Estate File

Once all the work is complete in the opening, administration, and closing of an estate, you may or may not wish to close the estate file in PSV in the computer. Your computer estate file is the electronic equivalent of a file folder in your file drawer. Closing out the file would be the equivalent of pulling the redweld out of a file drawer, marking it for the warehouse and sending it out to storage. In other words, it's totally inactive for future use. If you're the type of office that likes to close out your files and keep everything tidy, feel free to check **CHECK to close Estate File** at the end of your Probate. Otherwise, don't bother and just leave the file open so that you can keep using it. Of course, if you do lots and lots of estates and your **File Manager** list is getting too long, you might decide to close out some of your older ones that you are certain will not require any future activity.

This is a brief overview of how a document assembly system can streamline the practice of law in such document-intensive areas such as probate.

NEBRASKA DOCS

The Nebraska State Bar Association entered into a cooperative arrangement with the Iowa State Bar Association to develop a document assembly system that would operate with a library of general civil and criminal pleadings and documents. This system continues to be developed and is available for practitioners to purchase as a CD with an underlying operating system of HotDocs.

Operationally, like Probate System V, NebDocs provides interviews that will populate the templates and allow the system to generate documents.

A general collection of pleadings was used and is being added to on a regular basis. At this point, the Nebraska version of this system (IowaDocs has been in use for a number of years) is most appropriate as a tool for newer lawyers or solo-small firm lawyers who may not have developed extensive form libraries.

One difference between the Nebraska and Iowa forms systems, is that Iowa has a set of civil practice forms called "bordered forms" wherein the text of the form cannot be altered, but only the client information variables. Nebraska does not have an equivalent system, and all of our pleadings can be adjusted as local practice or custom determines.

The software and forms are sold as an annual subscription and are provided on a CD.

For more information on NebDocs, please see the appendix.

Basha Systems
(800) 725-0326

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NSBA Probate System V - Features

MANAGEMENT OF CLIENT DATA: Probate System V excels at managing your client-specific data with a comprehensive and easy-to-use interface. The system is organized around the "probate" or "estate" file. Once you open a new file and assign it to an attorney, assisting attorney and paralegal, you then enter information about:

- the decedent and other information currently gathered on the Master Information List checklist
- interested parties
- testamentary documents, including the will, codicils and any separate writings having a bearing on the estate
- estate assets and distributions. This information need only be entered once. However, you can change or update this information at any time

COMPREHENSIVE SET OF FORMS: Probate System V includes over 225 forms and checklists. Each form interview includes the complete reference text for such form found in the Probate IV manual. Forms can be assembled in blank or with client-specific data gathered during the file interview and document-specific interviews. You can access forms either by chapter and section of the manual or by form number.

CUSTOMIZATION: Probate System V goes beyond the typical document assembly system. With Probate System V you have extensive customization options. You can customize the pleading captions and signature blocks. You can add electronic letterhead. Each form itself can be customized so that your firm's version of a particular form is used in lieu of the shipping form. In addition, you can create your own custom pleadings, letters and memos using the information in the client's estate file.

PRACTITIONER TOOLS: Along with the forms come extensive practitioner tools to help you manage your estate file. The system ships with a handy tool for summarizing the provisions of your client's will. As you review your client's documents (the will, codicils, trusts and separate writings), you can take notes on each provision which will require action, note the type of provision, the section of the document, the text of provision, and the affected persons. You can then print out a complete report organized by document, type of provision and affected person. The system also lets you inventory the assets of the estate and track distributions of those assets. While estate tax forms and estate accounting are not currently supported, the data gathered in the assets and distributions table can be used to simplify the estate tax preparation process.

PRICING: The product will licensed on the basis of number of opened estate files. The software will be free. Updates will be free. Technical support will be free. The initial purchase price of $200 will include free remote installation and configuration of the software for your practice and four estate files. Additional estate files can be purchased for $50 per file, with the price dropping to $25 per file for prepaid purchases of 100 or more estate files for your firm.

There is no limit on the time you have to use the software or the number of documents you can create for a given estate file. There is no limit to the number of machines on which you can install the GhostFill client software, so long as the templates are on a shared network drive. There will be no annual update or maintenance fees. The only charges will be for additional estate files or for consulting services in connection with customization of the shipping forms or creation of additional forms.

SUPPORT: Support for the system will be provided both by NSBA and Basha Systems. Initial calls should go to NSBA. Email support will be provided by Basha Systems along with remote desktop assistance where required. In addition, we will be establishing an electronic discussion forum for discussion of revisions to the forms and support issues. You will receive notifications of any replies to your posts. We will also be scheduling period web-training classes on the use of the product conducted by Basha Systems.

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Product Resources

Practice Management Sites

- AdvologixPM
- Amicus + Credenza
- EPMS for Time Matters
- OMS for Time Matters
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Document Assembly Sites

- ContractExpress
- Exari
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(800) 725-0326

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NSBA Probate System V - Pricing

Nebraska Probate System V is a "pay per drink" model. Clients are not charged annual fees, maintenance, upgrade fees or the like. There is an initial charge to purchase the system (which includes 4 licences) and from that point forward, clients are charged per matter. To purchase Probate System V, or puchase additional licences, please click here to visit our online store.

Description	Licence Count	Price
Probate Systems V	4	$200.00
NSBA's Probate System V includes GhostFill software, application license, complete electronic manual and automated forms, and four (4) estate files.		
Quick Order	1	$50.00
Need to open a new estate file and wish to pay as you go.		
Bulk Purchase	5	$250.00
Plan ahead. Purchase five estate files. Be prepared when the next probate case comes in.		
Active Practice	10	$450.00
Take advantage of volume discounts. Save 10% over single file purchase price.		
Busy Practice	25	$1,000.00
For an active probate practice. Save 20% over single file purchase price.		
Multi-Lawyer Practice	50	$1,750.00
If you practice with other attorneys, you should consider purchasing 50 files for your office, saving 30% over the single file purchase price.		
Large Firm Practice	100	$2,500.00
If you are working in a large firm with a high-volume of probate actions, consider purchasing 100 files at a discount of 50% off the single file purchase price.		

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NSBA Probate System V - Forms and Commentary

Nebraska Probate Form Commentary

Demand for Notice	Nebraska Probate Form 100
Notice to Demandant of Application for Informal Proceedings	Nebraska Probate Form 101
Waiver of Notice	Nebraska Probate Form 105
Order Setting Date for Hearing & Notice	Nebraska Probate Form 106
Motion for Hearing & Change of Notice	Nebraska Probate Form 107
Order for Hearing & Change of Notice	Nebraska Probate Form 108
Affidavit of Mailing Notice	Nebraska Probate Form 109
Renunciation of Right to Appoint and Nomination of Personal Representative	Nebraska Probate Form 130
Waiver of Bond	Nebraska Probate Form 135
Statement of Value and Income for Purposes of Bond	Nebraska Probate Form 136
Affidavit for Transfer Of Personal Property Without Probate Under Nebraska Probate Code	Nebraska Probate Form 150
Affidavit for Transfer of Decedents Motor Vehicle	Nebraska Probate Form 151
Petition For Formal Probate of Will, Determination of Heirs, And Appointment of Personal Representative	Nebraska Probate Form 200
Order Admitting Will To Formal Probate, Determination Of Heirs And Appointment Of Personal Representative	Nebraska Probate Form 201
Notice Of Hearing On Probate And Appointment Of Personal Epresentative (Probate Of Will, Determination Of Heirs, And Appointment Of Personal Representative)	Nebraska Probate Form 202
Petition For Formal Adjudication Of Intestacy, Determination Of Heirs, And Appointment Of Personal Representative	Nebraska Probate Form 210
Order Of Intestacy, Determination Of Heirs, And Appointment Of Personal Representative	Nebraska Probate Form 211
Notice Of Hearing On Administration (Adjudication Of Intestacy, Determination Of Heirs, And Appointment Of Personal Representative)	Nebraska Probate Form 212
Application For Informal Probate Of Will And Informal Appointment Of Personal Representative	Nebraska Probate Form 220
Registrar's Statement Of Informal Probate	Nebraska Probate Form 221
Notice Of Informal Probate And Appointment Of Personal Representative And Notice To Creditors	Nebraska Probate Form 223
Notice Of Informal Probate And Appointment Of Personal Representative (Without Notice To Creditors)	Nebraska Probate Form 224
Application For Informal Appointment Of Personal Representative In Intestacy: NSBA Probate Commentary	Nebraska Probate Form 230
Registrar's Statement Of Informal Appointment Of Personal Representative In Intestacy	Nebraska Probate Form 231
Notice Of Informal Appointment Of Personal Representative And Notice To Creditors (Informal Intestacy)	Nebraska Probate Form 233
Notice Of Informal Appointment Of Personal Representative (Without Notice To Creditors)	Nebraska Probate Form 234
Petition For Appointment Of Special Administrator In Formal Proceedings: NSBA Probate Commentary	Nebraska Probate Form 240
Notice Of Hearing On Appointment Of Special Administrator: NSBA Probate Commentary	Nebraska Probate Form 240a
Order Appointing Special Administrator In Formal Proceedings	Nebraska Probate Form 241
Application For Appointment Of Special Aministrator In Informal Proceedings	Nebraska Probate Form 242

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Informal Appointment Of Special Administrator	Nebraska Probate Form 243
Letters Of Special Administrator	Nebraska Probate Form 244
Petition For Supervised Administration	Nebraska Probate Form 250
Notice Of Hearing On Supervised Administration	Nebraska Probate Form 250a
Order For Supervised Administration	Nebraska Probate Form 251
Petition For Supervised Administration When Testacy And/Or Appointment Of Personal Representative Not Previously Adjudicated	Nebraska Probate Form 252
Order Determining Testacy, Appointing Personal Representative And Supervised Administration	Nebraska Probate Form 253
Notice Of Hearing On Review Of Employment And Fees	Nebraska Probate Form 254
Affidavit For Collection Of Assets By Domiciliary Foreign Personal Representative	Nebraska Probate Form 260
Proof Of Authority Of Domiciliary Foreign Personal Representative	Nebraska Probate Form 261
Acceptance Of Appointment	Nebraska Probate Form 300
Appointment Of Resident Agent	Nebraska Probate Form 301
Demand For Bond	Nebraska Probate Form 301b
Bond Of Personal Representative	Nebraska Probate Form 302
Letters Of Personal Representative	Nebraska Probate Form 303
Waiver Of Personal Representative Fees	Nebraska Probate Form 307
Notice Of Formal Appointment Of Personal Representative And Notice To Creditors	Nebraska Probate Form 310
Notice Of Formal Appointment Of Personal Representative (Without Notice To Creditors)	Nebraska Probate Form 311
Statement Of Claim	Nebraska Probate Form 313
Notice Of Disallowance Of Claim	Nebraska Probate Form 314
Petition For Allowance Of Claim	Nebraska Probate Form 315
Notice Of Hearing On Allowance Of Claim	Nebraska Probate Form 315a
Petition For Elective Share	Nebraska Probate Form 323
Notice Of Petition For Elective Share Of Augmented Estate	Nebraska Probate Form 324
Notice Of Hearing On Elective Share Of Augmented Estate	Nebraska Probate Form 324a
Worksheet For Computation Of Augmented Estate	Nebraska Probate Form 326
Withdrawal Of Demand For Elective Share	Nebraska Probate Form 328
Inventory	Nebraska Probate Form 330
Short Form Inventory	Nebraska Probate Form 331
Certificate Of County Court Proceeding Involving Real Estate	Nebraska Probate Form 332
Petition For Authority To Sell Real Property	Nebraska Probate Form 340
Order Authorizing Sale Of Real Property	Nebraska Probate Form 341
Notice Of Hearing On Authority To Sell Real Property	Nebraska Probate Form 342
Estate Accounting Sheet	Nebraska Probate Form 343
Interim Accounting	Nebraska Probate Form 344
Petition To Allow Personal Representative To Select Homestead Allowance And Exempt Property	Nebraska Probate Form 360
Order For Selection Of Homestead Allowance And Exempt Property	Nebraska Probate Form 361
Notice Of Determination By Personal Representative Of Homestead Allowance And Exempt Property	Nebraska Probate Form 362
Notice Of Determination By Personal Representative Of Family Allowance	Nebraska Probate Form 363
Deed Of Distribution By Personal Representative	Nebraska Probate Form 370
Instrument Of Distribution Of Personal Property By Personal Representative	Nebraska Probate Form 372
Renunciation Under Nebraska Probate Code § 30-2352 And Irc §§ 2518 And 2046	Nebraska Probate Form 390
Formal Petition For Complete Settlement After Informal Testate Proceeding	Nebraska Probate Form 400
Formal Order For Complete Settlement After Informal Testate Proceeding	Nebraska Probate Form 401
Formal Petition For Complete Settlement After Informal Intestate Proceeding	Nebraska Probate Form 402
Formal Order For Complete Settlement After Informal Intestate Proceeding	Nebraska Probate Form 403
Formal Petition For Complete Settlement After Formal Testate Proceeding	Nebraska Probate Form 404
Formal Order For Complete Settlement After Formal Testate Proceeding	Nebraska Probate Form 405
Formal Petition For Complete Settlement After Formal Intestate Proceeding	Nebraska Probate Form 406
Formal Order For Complete Settlement After Formal Intestate Proceeding	Nebraska Probate Form 407
Notice Of Hearing On Complete Settlement After Informal Probate Of Will (Final Account And Report, Probate Of Will, Determination Of Heirs, And Determination Of Inheritance Tax)	Nebraska Probate Form 409a
Notice Of Hearing On Complete Settlement After Formal Testacy Proceedings (Final Account And Report And Determination Of Inheritance Tax)	Nebraska Probate Form 409b

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Notice Of Hearing On Complete Settlement After Informal Intestacy Administration (Final Account And Report, Adjudication Of Intestacy, Determination Of Heirs, And Determination Of Inheritance Tax)	Nebraska Probate Form 409c
Notice Of Hearing On Final Settlement After Informal Probate Without Determination Of Testacy (Final Account And Report And Determination Of Inheritance Tax)	Nebraska Probate Form 409d
Formal Closing Receipt	Nebraska Probate Form 410
Decree Of Final Discharge	Nebraska Probate Form 411
Informal Closing Of Estate By Verified Statement	Nebraska Probate Form 412
Application For Certificate Discharging Liens Securing Fiduciary Performance	Nebraska Probate Form 413
Informal Closing Receipt	Nebraska Probate Form 414
Small Estate Closing Statement	Nebraska Probate Form 415
Informal Application For Release Of Sureties	Nebraska Probate Form 416
Schedule Of Distribution	Nebraska Probate Form 422
Certificate Of Mailing Schedule Of Distribution	Nebraska Probate Form 422a
Inheritance Tax Worksheet	Nebraska Probate Form 500
Application To Pay Tentative Inheritance Tax	Nebraska Probate Form 510
Order To Allow Payment Of Tentative Inheritance Tax	Nebraska Probate Form 511
Application To Release Tax Liens	Nebraska Probate Form 512
Order To Release Tax Liens	Nebraska Probate Form 513
Petition For Determination Of Inheritance Tax	Nebraska Probate Form 520
Order Determining And Assessing Inheritance Tax	Nebraska Probate Form 521a
Order Determining No Inheritance Tax Due, Voluntary Appearance And Waiver Of Notice	Nebraska Probate Form 521b
Notice Of Hearing On Determination of Inheritance Tax	Nebraska Probate Form 522
Voluntary Appearance And Waiver Of Notice Of Interested Parties	Nebraska Probate Form 523
Voluntary Appearance, Waiver Of Notice, And Agreement To Pay Inheritance Tax	Nebraska Probate Form 524
Certificate Evidencing Payment Of County Inheritance Tax	Nebraska Probate Form 525
Order Appointing Acting County Attorney	Nebraska Probate Form 530
Affidavit Of Marital Status	Nebraska Probate Form 535
Notice Of Election Under Irc § 6166 To Extend Time For Payment Of Estate Tax Attributable To Interest In A Closely Held Business	Nebraska Probate Form 807
Eligibility For Federal Estate Tax Deferral Under Irc § 6166 Worksheet	Nebraska Probate Form 808
Election Under Irc § 6324a Of Special Lien For Estate Tax	Nebraska Probate Form 809
Agreement Under Irc § 6324a	Nebraska Probate Form 809a
Discharge Of Fiduciary From Personal Liability Under Irc § 2204	Nebraska Probate Form 810
IRS: How To Prepare Application For Certificate Of Subordination Of Federal Tax Lien	IRS Probate Form 784
IRS: Application Under Irc § 6325(C) For Release Of Specific Property From Irc § 6324 Estate Tax Lien	IRS Probate Form 4422
Waiver Of Estate Tax Deduction For Administration Expenses Under Reg. § 1.642(G)	Nebraska Probate Form 901
Petition For Formal Probate Of Will, Determination Of Heirs, Appointment Of Personal Representative, Order Setting Aside Prior Informal Appointment In Intestacy,And For Restraining Order	Nebraska Probate Form 1000
Objections To Petition For Formal Probate Of Will, Determination Of Heirs, And Appointment Of Personal Representative	Nebraska Probate Form 1001
Order Continuing Hearing On Petition For Formal Probate Of Will, Determination Of Heirs, And Appointment Of Personal Representative	Nebraska Probate Form 1002
Notice Of Transfer Of Proceedings For Formal Probate Of Will And Objections Thereto	Nebraska Probate Form 1003
Petition To Enforce Claim Against Estate Of A Decedent	Nebraska Probate Form 1004
Notice Of Transfer Of Claim Not In Excess Of $10,000 To Regular Docket Of County Court	Nebraska Probate Form 1005

Basha Systems
(800) 725-0326

Support Store

Home Nebraska Probate NSBA PSV Videos Contact Basha

NSBA Probate System V - Links

Nebraska Bar Probate System V & Online Support

While working with the Nebraska Bar's Probate System ("PSV") product and revolutionizing it with the power of GhostFill document assembly, Basha Systems also embarked upon a web campaign to ensure that PSV was as solidly supported as possible. To see what we mean by "solid support", read on.

Probate Announcements & Support

The PSV Website delivers regular updates to subscribers, as well as breaking news, and advices as to upcoming features in the PSV product.

Probate Forums

A complete set of forums & message board can be found here, with specific forums dedicated to FAQ's, general member chat and support requests.

Probate Store

Why bother spending time on the phone to order some more probate files? By visiting our PSV Online Store, you can purchase new units and be good to go within minutes, at any time or the day.

Main Menu

- Home
- Nebraska Probate
  - NSBA PSV 5 Features
  - NSBA PSV 5 Pricing
  - NSBA PSV 5 Links
  - NSBA PSV 5 - Forms Commentary
- NSBA PSV Videos
- Contact Basha

Basha Network

- Main Site
- Basha's Blog
- Basha Store
- Bahsa White Papers
- Estate Planning

Product Resources

Practice Management Sites

- AdvologixPM
- Amicus + Credenza
- EPMS for Time Matters
- OMS for Time Matters
- Time Matters

Document Assembly Sites

- ContractExpress
- Exari
- HotDocs
- Nebraska PSV 5

What is Document Automation/Assembly?

"Document automation/assembly, at the most basic level, is the creation of new, complete documents from the combination of new, and existing information."

Document Automation or Document Assembly saves time, effort and money in the production of repetitive documents and forms. A document assembly/automation system is a computer program that is used to create templates. When launched these templates ask questions and automatically create customized documents based on the answers given.

Document assembly overcomes the problems in ordinary work processing, such as cutting, pasting, and reformatting. You get a customized document with all the blanks filled in, all the pronouns and verbs grammatically in place, all the paragraphs properly placed and numbered -everything complete and correct, in a fraction of the time it would take you using a word processor.

With a document assembly system, once templates are created you can increase your productivity many times, while improving the quality of client services.

2012 NebDocs Order Form

User Manual
Quick Start Manual

List of Forms

System Requirements

Support Items:
Error Report Form
Tutorials
Knowledge Base
Remote Help!

Contact For Pricing/Ordering:
402-475-7091 or
800-927-0117

Contact Support:
support@nebdocs.net
877-243-3179

What is NebDocs?

NebDocs™ takes document assembly to the next level. Not only does this program provide you the benefits of document assembly described above, it provides you with Nebraska State Bar Association templates that can be implemented in your practice out of the box. The documents provided in NebDocs™ have been created by the various substantive law sections of the Nebraska State Bar Association and will be reviewed periodically by these sections to ensure they are compliant with current Nebraska law.

Why use NebDocs™?

"Research indicates that creating documents from within a document assembly system is 50% to 80% quicker than standard creation"

Increased productivity and lower cost

NebDocs™ templates prompt users to provide required information in a logical sequence. The template then automatically marries answers to format and assembles the document. **NebDocs**™ lets you use the word processing programs your staff is comfortable with – Microsoft Word or Corel WordPerfect. You may also save assembled documents as universally accepted PDF files.

Minimize errors

- § Since each new document starts from a template it retains the properties of the template and doesn't allow the human error factor caused by repetitive typing to be introduced.
- § Search and replace is not needed to update verb tenses, gender references, dates/numbers and much more.

Improve document consistency

- · Since each new document starts from a template each finished legal document contains consistent language.

Share knowledge

- · **NebDocs™ allows** experienced colleagues to share knowledge with new colleagues enabling them to come up to speed quicker.
- · Help messages and interview questions are built into templates to assist end users with document completion.

Quick Start Guide

Provided by The Nebraska State Bar Association
www.nebdocs.net

Table Of Contents:

Technical Support:

Technical Support is available to help you use NebDocs . If you are having difficulties installing or using the software contact us at the following:

Internet	www.nebdocs.net
Email Support	support@NebDocs.net
Support Phone	(877) 243-3179

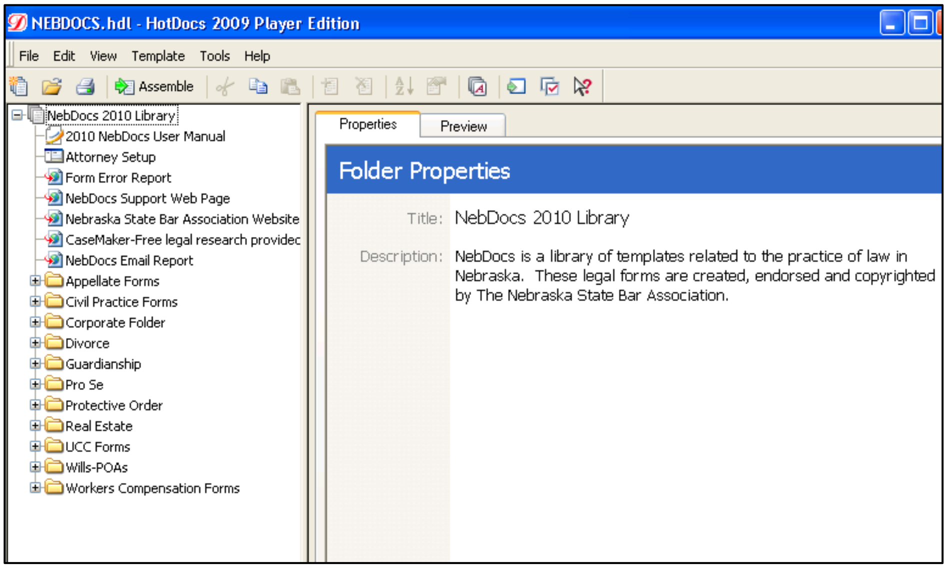
Support is available from 9:00 A.M. to 3:00 P.M. Central Standard Time, Monday through Friday. To expedite your call, please be at your computer on which the program is running.

Assembling an NebDocs Form:

Display the Library

Double-click on the NebDocs shortcut on the desktop – OR -
Choose **HotDocs 2009 Player > NebDocs** at the **Start/Programs menu**. The NebDocs library window appears.

To Assemble/Fill a document



1. At the NebDocs library window, select a template (Note: see “Finding a Form” below).
2. Click **Assemble**. The **Answer File** dialog box appears.
3. Select the type of answer file needed, then click **OK**.
4. If this is a new answer file then it is recommended that you save your answer file first. Go to File/Save Answers or click on the Save Answers icon in the toolbar. To save often, simply click the icon or Ctrl+S.
   (Note: see “About Answer Files” section for more information Answer Files)
5. Answer the dialog questions in the “Interview Tab”, then click **Next** to advance to each new dialog.
6. After the final dialog, the **End of Interview** dialog identifies how many questions haven't been answered. This dialog also provides options for working with the assembled document. For RTF forms you will send the document to your word processor where you can edit, save and print your form.

Finding a Form

You can use the “Find” feature in order to find a form in the library. All forms have a title which can be used to find forms. You can also search on form descriptions, also.

1. To use the find feature, have the NebDocs Library window open.
2. At the bottom left of the library screen, locate the Find dialog box, type in your text (i.e. deed)
3. A list will populate with forms that have that criteria.
4. During this search, the checkbox will be checked. To go back to the library window, uncheck this box.

Saving and Printing an NebDocs Form:

Saving a RTF Form:

Once NebDocs displays an assembled document in your word processor, the document is a normal word processing document. You can manipulate this document just like any other word processing document. You may change your answer or standard document text. Any changes to your answers will not be saved in the answer file that you saved during the interview dialog, nor will any standard document text change within the template that you selected from the library listing in NebDocs.

Printing a RTF Form:

Once NebDocs displays an assembled document in your word processor, the document is a normal word processing document. You can print as you normally would print a word processing file.

Saving a HPT* Form:

Once you have completed the form interview the "End of Interview" options are a different than if the form was a word processing type of form. Once you save this type of form it can be edited with HotDocs Filler. Any changes made will not be saved in the answer file.

Printing a HPT* Form:

To print this type of form you can either print using the "Form Document" tab after the interview is completed. Or you can send (or open at a later time) the form in HotDocs Filler to print. Once you select Print you will see a typical print dialog box as you would in any other type of application that you would print from.

** An HPT form is a graphical form that usually is a pre-formatted form. State and Federal forms are generally classified as a HPT forms because the state or federal government dictates the format and content of these forms. These forms cannot be saved or used as a word processing type form. In order to manipulate these forms you would need to use an answer file to recreate the form or use HotDocs Filler to open the form for editing purposes. Only answer fields can be changed on these forms*

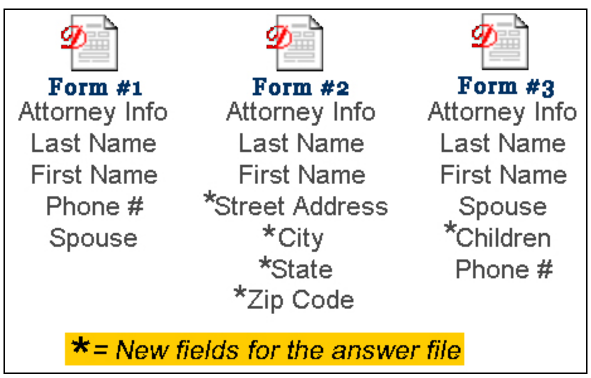
About Answer Files

When you assemble a document or fill a form, you can save the information you entered for the document or form (the "answers") in a HotDocs answer file. The answer file stores each answer along with the name of the variable that uses that answer. The answer file can be used again later to produce the same document or form without the need to answer the same questions again. You can also use the answer file to assemble documents and fill forms from other templates that use the same variables.

IMPORTANT: Answer files serve three main purposes: 1) they provide an efficient way to assemble multiple, similar forms quickly, 2) you can 'share' the answers for multiple users to access so others do not need to type the same information for a client, and 3) they provide a backup in case of computer or user malfunction.

The best way to organize your answer files depends largely on your type of practice. Some users create one answer file per client. Others create one answer file per matter. (This method is especially good when you have multiple matters per client that use the same forms, because it prevents the answers from the current matter from overwriting the answers from a different matter and the answers from a previous matter from getting used accidentally in the current matter.) Still other users combine the two methods, creating a pattern answer file for each client that contains basic client information, and then using the pattern file to copy the answers into a new file every time they start a new matter for the client.

Answer files have the filename extension .ANS (or .ANX) and are stored by default in the default answer file directory (<user>\My Documents\HotDocs\Answers). You can specify a different directory (shared or on a network to share answer files with others) when you create an answer file.



NOTE: All 3 of the above forms are using the same answer file.

Using an Existing Answer File

You can use an existing answer file to assemble a document or fill a form. You can save any changes you make to the answers in the file, or you can use the answer file but not save your changes.

To use an existing answer file

1. Open the template you would like to use.
2. At the Answer File dialog box, click on the Select Answer File button ().
3. Find the Answer File you want to use. Click on Open
4. Assemble the document or fill the form.

✎Tip
To reopen the last answer file you used, click on the drop down menu to select the previous answer files you have used.

You can select an answer file so that it can be used for all documents you assemble and forms you fill until you select another answer file. Check the “Remember Selected Answer File” box.

Save an Answer File During Assembly

You can save an answer file at any time while you are assembling a document.

To save an answer file during assembly

1. Go to the **File menu** and select **Save Answers As**… (use Save Answers if you have already saved the answers once before)
2. Give your answer file a file name (i.e. client last name, first name)
3. Hit your tab key – this will take you to the Title field – this will automatically put in your file name for you.
4. Click on **OK**

If you are using a new answer file, HotDocs opens an empty, untitled answer file. Give the answer file a name. If you are using an existing answer file, HotDocs saves the answers you have entered to that file.

Updating NebDocs

Notification of Template Updates

Automatic notification of updates via the internet. Your computer must be connected to the internet to receive updates. Note some network installations might not work correctly, please contact technical support for assistance.
(NOTE: this is done by having a HCAT File on your computer basically talk to our server for updates. The HCAT File is automatically installed on your computer. If you don’t get a notice of updates and believe there are please visit www.nebdocs.net for more information on getting this file installed correctly)

1. Launch NebDocs.
2. Double-click on the flashing yellow icon in the lower right. If you do not see a flashing icon then there are no updates currently available.
3. List of updates will display.
4. Select the updates needed.
5. Click on “Continue”.
6. Select “Overwrite All” (if prompted).
7. Click “Ok” at the successful screen

Keyboard Shortcuts and Keystroke for Symbols

Keyboard Shortcuts

Open	Ctrl+O
Close	Ctrl+F4
Save	Ctrl+S
Exit	Alt+F4
Undo	Ctrl+Z
Redo	Ctrl+Y
Cut	Ctrl+X or Shift+Delete
Copy	Ctrl+C or Ctrl+Insert
Paste	Ctrl+V or Shift + Insert
Delete	Del
Select All	Ctrl+A
Previous Page	Alt+PgUp
Next Page	Alt+PgDn
Go To Page	Ctrl+G
Fit Page to Width	Ctrl+H
Zoom In	F10
Zoom Out	F9

Keystrokes for Symbols

º	**Alt+0186**
¢	**Alt+0162**
£	**Alt+0163**
§	**Alt+0167**
©	**Alt+0169**
®	**Alt+0174**
¶	**Alt+0182**
¼	**Alt+0188**
½	**Alt+0189**
¾	**Alt+0190**
™	**Alt+0153**
‰	**Alt+0137**

(updated: August 2010)

NebDocs is a library of templates related to the practice of law in Nebraska. These forms are copyrighted by NSBA, with the exception of any forms created by the Nebraska Supreme Court, the Administrative Office of the Courts and Probation, and the Nebraska Supreme Court Implementation Committee on Pro Se Litigation. The NSBA gratefully acknowledges the work of the Supreme Court Implementation Committee on Pro Se Litigation for the forms in the Pro Se Folder.

Appellate Forms

30 Day Extension of Brief Motion Example Only
30 Day Extension of Brief Motion
Motion to Dismiss Example Only
Motion To Dismiss
Request for Confidential Record - Example Only
Sample Brief Cover Sheet - Example Only
Sample Brief Table of Authorities - Example Only
Sample Syllabus of Brief - Example Only
Stipulation for Extension of Brief - Example Only
Stipulation for Extension of Brief

Civil Practice Forms

Amended Complaint
Complaint - Breach of Contract
Complaint - Construction
Complaint - Open Account
Complaint Business Dispute
Complaint Personal Injury-Negligence
Complaint Property Damage
Complaint-Personal Injury
Complaint-Personal Injury 2
Retainer Agreement

Corporations

Amendment or Correction to Biennial Report
Application for Amended Certificate of Authority
Application For Certificate of Authority to Transact Business
Application For Certificate of Authority to Transact Business, Page 3
Application for Electronic Access of Records (Foreign Corporations)
Application For Registration of Trade Name
Assignment of Registration - TM or SM
Assignment of Registration Trade Name

Certificate of Withdrawal to Transact Business in State of Nebraska
Domestic Change of Registered Agent and or Office
Foreign Change of Registered Agent and or Office
Registration or Renewal of Corporate Name - Foreign Corporations
Trademark or Servicemark Application

Limited Co-Op

Amendment or Correction to Biennial Report - Limited Cooperative Association
Application for Amended Certificate of Authority Limited Cooperative Association (Foreign)
Application For Certificate Of Authority Limited Cooperative Assoc (Foreign)
Cancellation of Certificate of Authority of Foreign Limited Cooperative Assoc
Change of Reg Agent and or Reg Office Limited Cooperative Association

Limited Partnership

Application For Reservation of Limited Partnership Name
Registration of Foreign Limited Partnership to Transact Business

LLC

Amended Articles of Organization Limited Liability Company
Application For Amended Certificate of Authority Limited Liability Company (Foreign)
Application For Certificate Of Authority Limited Liability Company (Foreign)
Application for Electronic Access of Records
Application for Reservation of Limited Liability Company Name
Application For Withdrawal Of Foreign Limited Liability Company
Articles of Dissolution Limited Liability Company
Change of Registered Agent and or Registered Office Limited Liability Co
Statement Of Intent To Dissolve Limited Liability Company

LLP

Statement of Qualification as a Limited Liability Partnership

Non-Profit Corporations

Application For Amended Certificate Of Authority (Non-Profit Corps)
Application for Certificate of Authority to Transact Business (Non-Profit Corps)
Certificate of Withdrawal to Transact Business in the State of Nebraska
Domestic Change of Registered Agent and or Office NP Corp
Foreign Change of Registered Agent and or Office NP Corps

Divorce

Alternate Service (Instructions Only)
Divorce Closing Checklist
Filing for Divorce in NE (No Children and No Disputed Property) Instructions Only
Instructions for Your Divorce Hearing
Proceeding Without Payment of Fees Instructions
Affidavit in Support of Application to Proceed in Forma Pauperis
Affidavit in Support of Motion for Alternative Service
Application to Proceed in Forma Pauperis
Certificate of Dissolution of Marriage or Annulment (Worksheet Only) HHS-73 Form
Certificate of Readiness
Complaint for Dissolution of Marriage
Complaint for Dissolution of Marriage (No Children)
Decree of Dissolution of Marriage
Decree of Dissolution of Marriage (No Children)
Decree of Dissolution of Marriage (Service By Publication)
Motion for Alternative Service
Notice of Divorce Proceeding
Notice of Hearing-General

Order for Trial
Order Granting Leave to Proceed in Forma Pauperis
Praecipe for Residential Service
Praecipe for Summons - Personal Service
Proof of Mailing
Proposed Scheduling Order
Voluntary Appearance
Voluntary Appearance

Parenting Act

Atty Cert of Providing Parenting Act Info DC-6-5-9
Cert of Completion of Parenting Education Course DC-6-5-5
Sample Court-Created Parenting Plan DC-6-5-7
Sample Parent-Created Parenting Plan DC-6-5-6

Guardianship

Acceptance of Guardian and Conservator
Acceptance of Temporary Guardianship and Temporary Conservatorship
Address Information Sheet (Form 16-8)
Affidavit Guardian-Conservator Training
Annual Account and Motion for Approval of Annual Account of Conservator - Fees and Expenses
Annual Report of Guardian on Condition of Ward (Form 16-10)
Annual Report of Guardian
Application-Order and Notice for Approval of Annual Accounting Fees (Form 16-7)
Certificate of Proof of Possession
Certificate of Proof of Possession
Guardian and Conservator's POA for Ward and Protected Person
Inventory
Inventory Form 16-2
Letters of Conservatorship - Child
Letters of Guardianship - Child
Letters of Guardianship and Conservatorship - Adult
Letters of Temp Guardianship and Conservatorship - Adult
Motion for Appointment of Ex Parte Temp Guardian and Temp Conservator
Notice of Hearing on Petition for Appoint of Guardian of Minor
Notice of Hearing on Petition for Appointment of Guard. and Cons. for Incap. and Protected Person
Notice of Hearing on Petition for Appointment of Guardian and Conservator for Incapacitatied and Protected Person
Order Appointing Conservator - Adult
Order Appointing Guardian - Adult
Order Appointing Guardian - Child
Order Appointing Temp Guardian and Temp Conservator
Personal Surety Bond
Petition for Appoint of Guardian and Conservator for Incapacitated Person
Petition for Appointment of Guardian or a Minor Child
Waiver - Parent-of-child
Waiver of Notice and Nomination of Guardian - Child
Waiver of Notice and Nomination of Guardian and Conservator - Adult

Pro Se

Filing a Divorce Case Without Payment of Fees DC-6-7 Instructions Only
Instructions for Filling Out Affidavit and Application to Proceed in Forma Pauperis DC-6-7-1a
Instructions for Filling Out Order to Proceed in Forma Pauperis DC-6-7-2a --
Affidavit and Application to Proceed inForma Pauperis DC-6-7-1
Order to Proceed in Forma Pauperis DC-6-7-2

Protective Order

Protective Order Info Domestic Abuse Form 19-9 Instructions Only
Petition and Affidavit to Obtain Domestic Abuse Protection Order DC-19-8

Protection Order Praecipe DC-19-1
Request For Hearing Form 19-14

Real Estate

Acknowledgement of Disclosures- Broker

Condos

Condominiums and Housing Association Instructions
Condo Action of Exec Board
Condo Articles of Incorp - For Profit
Condo Articles of Incorp - Non Profit
Condo Bylaws - NonProfit
Condo Common Interest Community Addendum
Condo Declaration
Condo Org Consent - For Profit
Condo Quit claim Deed
Party Wall Agreement

Construction Lien

Amendment to Construction Lien
Construction Lien
Construction Lien Waiver
Demand To Institute Judicial Proceedings
Notice of Commencement
Notice of Lien Liability
Notice of Recording Lien
Release of Construction Lien

Deeds

Conservator's Deed
Conservator's Joint Tenancy Deed
Corporation Joint Tenancy Quitclaim Deed
Corporation Quitclaim Deed
Corporation Warranty Deed
Corporation Joint Tenancy Warranty Deed
Deed of Distribution By Personal Representative
Joint Tenancy Quitclaim Deed
Joint Tenancy Warranty Deed
Partnership Joint Tenancy Quitclaim Deed
Partnership Joint Tenancy Warranty Deed
Partnership Quitclaim Deed
Partnership Warranty Deed
Personal Representative's Deed (Pursuant To Court Order)
Personal Representative's Deed, Version 1
Personal Representative's Deed, Version 2
Personal Representative's Joint Tenancy Deed (Pursuant To Court Order)
Personal Representative's Joint Tenancy Deed, Version 1
Personal Representative's Joint Tenancy Deed, Version 2
Quitclaim Deed
Special Joint Tenancy Warranty Deed
Special Warranty Deed
Trustee's Deed (Inter Vivos Trust)
Trustee's Deed (Testamentary Power)
Trustee's Joint Tenancy Deed (Inter Vivos Trust)
Trustee's Joint Tenancy Deed (Testamentary Power)
Warranty Deed

Escrow - Closing

Closing

Eviction

14 Day Notice to Tenant of Termination for subsequent breach
14-30 Notice to tenant for breach of lease
Abandoned Property Notice, property value in excess of $250
Abandoned Property Notice, property value under $250
Affidavit showing Service pursuant to Neb. Rev. Stat. § 76-1442.01
Complaint (Restitution, Rent and Damages)
Complaint form (Restitution only)
Forcible Entry and Detainer Complaint
Forcible Entry and Detainer, Notice to Vacate
Forcible Entry, Praecipe for Writecipe for Writ
Forcible Entry, Writ
Miscellaneous Clauses For Complaint
Mobile Home Complaint for Possession of Premises
Mobile Home Praecipe
Mobile Home Praecipe for Writ
Mobile Home, 5-Day Notice for Failure to Pay Rent
Notice of Failure to Comply with 14-30 Day Notice
Notice of Termination of Tenancy
Praecipe for Eviction Pursuant to Neb. Rev. Stat. §25-21,219 et. seq.
Praecipe for residential eviction pursuant to Neb. Rev. Stat. §76-1401 et. seq.
Praecipe for Writ of Restitution under Neb. Rev. Stat. § 76-1446
Substituted Service, Affidavit in Support of Motion
Substituted Service, Affidavit showing substituted service
Substituted Service, Motion
Substituted Service, Order Granting Substituted Service
Substituted Service, Praecipe for Alias Summons
Tenant Notice to Landlord
Tenant Notice to Landlord, Failure to Deliver Possession
Tenant Notice to Landlord, Fire or Casualty Damage
Three Day Notice for Failure to Pay Rent
Writ of Restitution, Mobile Home Action for Possession Neb. § 76-1450 et. seq.
Writ of Restitution, Neb. Rev. Stat. § 76-1401 et seq.

Financing and Foreclosure

Foreclosure Timelines
Agreement For The Sale and Purchase of Real Estate
Deed of Trust
FCSA Deed of Trust
FCSA Mortgage
Notice of Agreement For The Sale and Purchase of Real Estate
Notice of Default
Notice of Trustees Sale
Promissory Note
Real Estate Mortgage
Request For Reconveyance & Deed of Reconveyance
Substitution of Trustee

Partition Forms

Bond of Referee
Complaint in Partition
Confirmation of Sale and Order for Deed
Default Judgment
Instructions to Publisher
Motion for Distribution of Sale Proceeds
Motion for Service by Publication
Motion for Summary Judgment and Default Judgment

Defects of Title

- Affidavit - Celibacy
- Affidavit - Death of Life Tenant
- Affidavit - Heirship
- Affidavit - Life Insurance
- Affidavit - Marketable Title Affidavit, Version 2
- Affidavit - Martial Status
- Affidavit - Name Discrepancy
- Affidavit - Non Resident Spouse
- Affidavit - Non-Military Service
- Affidavit - Oil and Gas Lease - Bank
- Affidavit - Oil and Gas Lease - Landowner
- Affidavit - Satisfaction of Charge
- Affidavit - School Lease
- Affidavit of Marital Status
- Appendix IV-A Warranty Deed
- Appendix IV-C Warranty Deed
- Appendix IV-E Release
- Appendix IV-H Resolution Number
- Appendix IV-I Resolution Number
- Complaint
- Corporation Quitclaim Deed
- Correction Warranty Deed
- Letter to Department of Interior
- Marketable Title Affidavit
- Petition for Formal Adjudication of Intestacy and Determination of Heirs
- Quitclaim Deed

UCC Forms

- Revised Article 9 of the Nebraska UCC Seminar Manual
- November 1 2008 Notice on Liens
- EFS-1 Nebraska Effective Financing Statement
- EFS-2 Nebraska Effective Financing Statement
- EFS-3 Continuation or Termination of the Nebraska Effective Financing Statement
- EFS-A Nebraska Effective Financing Statement
- NE Ag Production Input Lien Notification Stmt
- Statutory Lien
- UCC Financing Statement Amendment Addendum
- UCC FS in Leu of Continuation
- UCC Information Request
- UCC1 Financing Statement
- UCC11
- UCC1Ad Financing Statement Addendum
- UCC3 FS Amendment
- UCC5 Correction Statement

Wills-Power of Attorneys

- Estate Planning Documents
- Will Drafting Checklist
- Will Questionnaire - To be printed and completed by client
- Will Signing Checklist
- Advance Directive - Catholic
- Disposition of Remains - Client Completed
- Disposition of Remains - PreFilled
- Durable General POA Short Form
- Durable POA with Living Will Provisions
- Living Will
- Personal Property Memo
- POA - Children
- POA Long Form

Revocation
Sample Will
Temporary POA - Children

Workers Compensation Forms

Workers Compensation 101
Sample Plaintiff Exhibit "List Only"
Application for Review
Certificate of Service
Certificate of Service - Interrogatories
Order for Change of Venue
Petition
Plaintiffs WC Interrogatories
Sample Letter - Request for Medical Information
Sample Letter - Request for Records
Stipulation for Change of Venue

System Requirements

Hardware

- 900 MHz processor (2GHz, recommended)
- 1 GB RAM (2 GB, recommended)
- 25 MB hard disk storage
- HP LaserJet printer (for printing graphical forms)
  (For the most reliable results, use a PCL-based printer with at least 8 MB RAM. Other types of printers may or may not print as expected. Click here for details.)

Software

- Microsoft Windows Vista or Windows XP
- Microsoft Internet Explorer 6.0 or later
- Microsoft Word 2007*, 2003*, XP*, 2000*; or Corel WordPerfect X4*, X3*, 12*, 11, 10, 9, or 8
  (WordPerfect X3 SP2 or WordPerfect X4 are the only versions of WordPerfect supported for use on Windows Vista.)

* Recommended Word Processors for NebDocs

Back

2012 SUBSCRIPTION AGREEMENT

INSTRUCTIONS FOR COMPLETION OF SUBSCRIPTION AGREEMENT:

1) Complete Name and Address Information.
2) Indicate Size Of Your Law Firm and Check Box for Corresponding Annual Subscription Fee.
3) Sign and Date Agreement.
4) Read, Date and Sign Agreement with NSBA. Fill out additional users on Page 3, making appropriate copies as needed and adding $15 per computer.
5) Mail Agreement to NSBA With Check Or Money Order.

NEBDOCS ANNUAL SUBSCRIPTION FEE SCHEDULE:

	Number of Lawyers	Cost*
☐	1	Call NSBA Office for Pro-rated Pricing (402) 475-7091
☐	2-3	
☐	4-5	
☐	6-9	
☐	10-20	
☐	21-30	
☐	31-40	
☐	41-50	
☐	51-60	
☐	61 or more	

Name: ______________________________
Member #: ____________________ No. of Lawyers in Firm: __________
Firm Name: ______________________________
Address: ______________________________
City/State/Zip: ______________________________
Phone: ____________________ Email: ____________________

Annual Subscription Fee __________
Sales Tax (Attorneys Practicing in Nebraska Only) __________
Number of computers program to be installed ___ x $15.00* __________
Total Amount Due __________

Card Type ☐ Visa ☐ Mastercard ☐ American Express ☐ Discover ☐ Check

Credit Card Number: ____________________ **Exp. Date:** __________ **Ver. Code:** ________

Please list all other users and the number of computers* on the program will be run on page3.

***There is a $15 licensing fee form LexisNexis per computer**

If your Credit Card billing address is DIFFERENT than the address listed above, please provide below:

Name on Card: ______________________________
Billing Address: ______________________________
City/State/Zip: ______________________________

NEBDOCS AGREEMENT:

By signing below I hereby subscribe to NEBDOCS (acknowledging that I have read and agree to the terms on the opposite page) and agree to pay during the term of this subscription the applicable charges. I understand that I will be charged for any delinquent amount due from me.

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Date:________________________ Subscriber's Signature_________________________________

Subscriber's PRINTED Name_________________________________

Minnesota Continuing
Legal Education

Automated Document Systems

Minnesota CLE offered its latest automated document system "CLEPro" to the Probate/Estate section of the Minnesota state bar in 2008. We contracted with LexisNexis to design a Probate document system using Minnesota CLE forms license their HotDocs software as the platform.

What is the CLEPro℠ Probate Document System?

About CLEPro℠

Minnesota CLE, in conjunction with Hot Docs©, developed this affordable and automated document assembly system to help Minnesota attorneys tackle any probate matter, large or small. Accessed via our website (minncle.org), CLEPro requires no software. We maintain and update the system; meaning that the only data saved to the user's computer are the most important, not to mention private – the users clients' information.

CLEPro can be used by subscribers to assemble forms one-by-one, or in caches according to probate types (formal, informal, etc.). Our website "interviews" the user to gain the data it needs, and forms appear – at the touch of a button – when the relevant questions are answered. The answers are saved to a single location – the user's computer. The end results are the very same time-tested Minnesota CLE forms that attorneys have used for decades, optimized for clarity, flexibility, and ease of use. CLEPro takes away the tedious parts of probate, saving time and money.

Special Features of the CLEPro℠ System

- This system includes **more than 215 updated forms** including informal, formal, general use forms, inventory, final account, and more!
- The forms used are the ones Minnesota attorney's have used for years…**the forms the judges and registrars know!**
- The **forms are flexible…**they expand to capture all information without using attachments!
- Not only do these forms **automatically fill in…**they **automatically calculate,** too!
- There is no software for the user to install! Simply access the system through our website. When we make system updates or add new forms, they will be available to the user instantly. **The user won't be bothered with installation and update CDs!**
- The users **answer files and assembled documents are saved to their own computer.** The user can access completed documents from their own computer with their own word processor.

To see the forms available in the CLEPro℠ Probate Document System please go to the Minnesota CLE website at: Minncle.org click the Online Resources button and scroll down to CLEPro.

CLEPro℠ – Pricing

Annual Subscription
Access to CLEPro℠ is offered on an annual subscription basis, currently priced at $95 per year.

Money-Back Guarantee
We believe that CLEPro℠ will revolutionize the way you handle probate. If you are not fully satisfied with our product, we will refund the price of your current subscription, no questions asked.

CLEPro℠ – System Recommendations

For PCs:

- This system can be used on PCs with Internet Explorer 6 or higher.

- To ensure correct formatting, we recommend using Microsoft Word to open assembled documents. Assembled documents can be downloaded to, or opened in, any word processor that can read .rtf files, however some of the document integrity and formatting may be lost.

For MACs:

- This system can be used on MACs using Internet Explorer 6 or higher, as long as Microsoft Windows is installed.

- To ensure correct formatting, we recommend using Microsoft Word to open assembled documents. Assembled documents can be downloaded to, or opened in, any word processor that can read .rtf files, however some of the document integrity and formatting may be lost.

CLEPro℠ – FAQs

1. **What are the system requirements for CLEPro℠? Will you send me a CD-ROM?**
   CLEPro requires a connection to the Internet and Internet Explorer, Firefox, or Google Chrome. It will not work with Safari. Completed forms can be edited using various word processing programs. Because CLEPro is accessed through our website, you will not receive any software.

2. **If I'm assembling these documents on your website, won't my clients' private information be stored there?**
   No. When you build forms, our website will "interview" you to gain the information it needs. As you answer the questions, an answer file is being created. That answer file can only be saved to your computer; it will disappear completely if you do not save it. Saved answer files can be recalled at any time and used to make multiple forms. (The website will always ask whether you want to begin the assembly process using an existing answer file, and prompt you to find it on your computer.)

3. **I can't find the answer file I saved yesterday. Where did it go?**
   Answer files are saved with the file extension .anx and will not be readable by programs or applications on your computer. Before you begin using CLEPro, we suggest creating a folder for all of your CLEPro information, at a location you can easily find. When our website prompts you to save answer files, be sure to save them to this location.

4. **I know I made a mistake in an answer file, how do I fix the error?**

   When our website asks you whether you want to begin using a new or existing answer file, simply choose the "existing answer file" option and recall the answer file in question. You can then scroll through the interview to locate the inappropriately answered question, and fix it.

5. **I noticed a minor error on my finished form and fixed it. Will this be reflected in the answer file?**

   No. In order to ensure the error doesn't reappear the next time you build a form for this client, you must correct the information in the answer file, using the process described in the answer immediately above. The ability to edit completed forms is a valuable option, but editing the answer file is the best way to use CLEPro as intended.

6. **How can I avoid having to type in the attorney information each time I use the system? What if I work with several attorneys?**

   To avoid having to type in the attorney information each time you begin a new probate, simply create an answer file containing only the attorney information. To do this, begin the system just like you would with a new probate and select "Begin using a new, empty answer file." Then select from the next menu "Single probate form." We suggest you select P-001. When the program asks you for specific information simply click through without answering the questions until you reach the attorney information questions. Complete that information and continue to the final screen. Then download and save the answer file to the specific location on your hard drive where you want to keep this attorney answer file and name it appropriately, e.g. SmithAttorneyFile.anx. If you work with more than one attorney create a separate answer file for each attorney.

   Now, when you go to open a new probate, after the Main Menu select "Use a previously saved answer file on my pc" and select your attorney answer file. At the end of the form assembly process save the answer file to your client's subdirectory or to wherever you save answer files and rename the answer file using your client's name.

7. **I don't have enough information to answer all of the interview questions, but my client is dropping by and I want the form to look professional. What can I do?**

   You can always download forms without completing an interview, but incomplete forms may contain unwanted coding and text. You can easily avoid this by inputting an underscore ("________") along the full bottom length of the question field.

8. **The legislature made changes that I'm certain will affect these forms. Do I need to do anything?**

   No. We will upload new form templates as necessary; and, although the system may function exactly as before, the relevant changes will be reflected on your completed forms. Members of the Minnesota State Bar Association's Probate & Trust Law Section review the forms regularly. If you believe any of our forms contains an error, please do not hesitate to call us at 651-227-8266 or 800-759-8840.

9. **Form attachments are cumbersome. Are they used in this system?**

   Form flexibility is integrated with the interview process. CLEPro forms are flexible and expand to capture all needed information (such as multiple interested parties) without resorting to attachments.

10. **What do I do if I decide that CLEPro℠ is not the program for me? Is there a return or cancellation policy?**

    We believe CLEPro will revolutionize the way you handle probate; therefore we offer a money-back guarantee. If you are not completely satisfied with our product, we will refund the price of your current subscription, no questions asked.

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