FormEvo.co.uk
Evolutionary Legal Forms

If your firm uses Lasting Powers of Attorney forms, and you are not using workflow software, FormEvo can help you save time and improve risk management.

Specific workflow bundles such as the LPA workflows can be used to save significant time and reduce the opportunity for errors across form bundles.

All forms and schedules that are related to each other are linked through auto population. This helps private client lawyers to accurately, and easily, complete these complex forms using automated calculations.

KEY FEATURES AND BENEFITS

- Work on multiple forms and schedules simultaneously

- Print all linked forms and schedules in one batch

- Set up templates for common matters to improve practice competences

- Add or remove relevant schedules for matters whilst brought forward figures auto update - delivering a smooth process

- Use a linked navigation panel to save the time it takes to find all the forms and schedules for each matter

- Automated calculations of asset values, and complex inheritance tax-due figures, provide greater accuracy and time savings for the system user

- Locked totals prevent users accidentally overtyping - but they can unlock these fields if required

"Automatic population of supplemental forms following initial data entry, and accompanying calculations, enables accurate and quick completion of forms"

Office of the
Public Guardian

Lasting Power of Attorney
LP1F
LP1H

What this form is for:

Lasting Power of Attorney forms **LP1F** for Property and Financial Affairs and **LP1H** for Health and Welfare can be either partly or completely populated by using this Workflow form. Complete the sections below and click **Create LPA Bundle** above.

Continuation forms LPC1 - LPC4 have been appended to the LP1F/LP1H forms and will populate any data filled from this LPA-Workflow.

If there are **People to Notify LP3**, simply click on the **Add LP3** button within this workflow once it has been completed.

Limitations

This form can be used for up to a **maximum of 6 Attorneys, 4 Replacement Attorneys 5 People to be told.**

Bookmarks

Use the left side bookmark panel to navigate through each section. As you complete a section the bookmark will change from **white** to **orange** indicating the section is active.

Optionally, you can also tick the red box at the end of each section to indicate the section has been completed which will change the bookmark from orange to **green**.

The bookmarks colours and links are designed to make the navigation easier and to help visually show what stage the LP1 is at.

A **covering letter** addressed to the OPG has also been included within your bundle for your convenience. Once your workflow has been completed, click below if you wish to use it.

Guidance

Do not leave sections blank. If a section is not relevant, use **Cross Out button.**

Information entered on this workflow form will be copied to selected bundled forms. This form is for **'Data Collection Only'** and not for printing and submitting.

Include this LPA-WF data entry form in your **Print Bundle** (for **internal** use only). If left unchecked, your printed bundle will contain summary pages, followed by your chosen LPA forms and all continuation pages used.

LP1 summary pages containing all party details are available at the end of this workflow. If you only want to print these pages, click **Print Form** in the Bookmark panel.

Typical Scenario

If you are creating an LPA bundle for both a Husband and Wife where the Husband is the Donor and the Wife is Attorney 1 and all other Parties are the same or similar, to save time you can switch Donor and Attorney 1.

- Fill the whole LPA for 'Husband' as Donor

- Navigate to Donor section and click **'Make Copy - LPA-WF'.** This will create a copy of your LPA-WF form with -1 added to the saved file name.

- In the new LPA bundle, navigate to Donor section and click **'Swap Donor/Attorney**

FormEvo.co.uk
Evolutionary Legal & Professional Forms

LPAs are a source of extra, profitable work for law firms. Capacity checking, multiple clients, multiple LPAs and alternatives for each file: A lot of time is spent form-filling and repeating information. FormEvo takes care of all of that.

FormEvo can be integrated with many Case Management and Document management Systems and even your 'Searches' Provider. Data-Mapping is much easier than traditional on-prem' applications through the use of Common Field Naming conventions.

FormEvo workflows provides risk management at every stage of the process – for example, when ensuring benefactor capacity. That means focusing on the clients and their circumstances, not just the forms.

"Some forms are combined into bundles where we can auto populate data across multiple forms and set up auto calculations that can take out up to 80% of the time to complete as non-bundled forms"

If you'd like to know more, contact us at enquiries@formevo.co.uk or call our Sales Director Paul on 07340 902835

Legal Tech
Buyers Guide
Supplier of the
Year 2023