

Family Law Practitioner's Apprentice



Version 2+

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Puritas Springs Software

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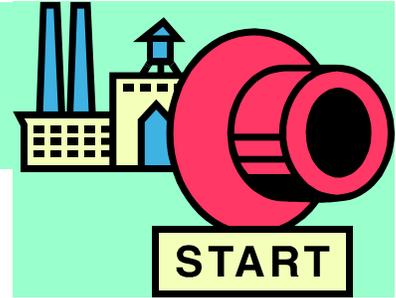
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Getting Started



Puritas Springs Software's *Family Law Practitioner's Apprentice—Version 2+ (FLPA2)* is an ordinary 32 bit *Windows* program that runs on *Windows Vista*, *Windows XP*, *Windows 2000*, *Windows ME*, and *Windows 98*. **FLPA2** comes in different versions for single-user and network installations. You can assume that, unless you specifically purchased a network license, yours is the single user version.

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The topics below give you basic information about window components and technical information concerning the installation process and networks. In all likelihood you already know the *Windows* basics, and you may not need any other technical information, but it's here for you if you need it.

Window Components

Most *Windows* programs appear in a window. A "window" is nothing more than a rectangle on your screen that contains a running application. Each window has several parts—a *title bar* containing the name of the *Windows* application, a *menu bar* with drop down menus containing various commands, a *tool bar* with buttons for common operations, and a *client area* where documents or other information are displayed. Each of these windows components is explained below.

- the *title bar* is the top line of the window; it displays the program call letters—**FLPA2**—and adds the name of the file currently loaded and the particular form at which you are looking. A typical title bar example might be:

FLPA2: Smith, James H—[General Information Worksheet]

- the *menu bar* is directly under the title bar; from left to right, the drop-down menus are: File, Worksheet, Document/Form, Options, Window and Help. There is also a menu that appears when any one of the six database worksheets is on the screen. The individual database worksheet menus take the name of the database (Child, Third Party, Asset, Debt, Income and Expense) and contain a set of commands specific to the database worksheets. Note that the underlined characters in the menu indicate that holding down <ALT> together with the underlined character will pull that menu down without needing to use your mouse.
- The *tool bar* is directly under the menu bar. It contains buttons that let you execute certain, oft-used commands without navigating the menu system; from left

to right, the buttons perform the following functions: create a new client file, open or load a client file from disk, save the currently loaded client file to disk. The next six buttons display the database worksheets: Child, Third Party, Asset, Debt, Income and Expense. The last two buttons close the active window and exit *FLPA2* respectively. *Note that the function of any button can be ascertained by letting the mouse pointer remain stationary over the button.* A help hint will appear. There are a few buttons that only appear in certain contexts. There are Print This Form and Send To Word Processor buttons that appear when *static forms* are on your screen; there are paging buttons that also appear when the *static forms* are multi-page.

- the *client area* is the large portion of the window where you see your worksheets or where the Document Wizard appears.

Technical Information

Your client information is contained in a file that has an FL2 extension and contains the following:

1. The General Information Worksheet;
2. The 6 database worksheets;
3. Information directly entered on static forms; and
4. The information you enter into the various Document Wizards.

- ! **IMPORTANT NOTE:** For most documents, *FLPA2* does NOT display or allow you to edit them. *FLPA2's* basic function is to generate a complete document and send it to YOUR WORD PROCESSOR. It stores these completed documents as rich text or RTF files in the following directory: C:\Puritas\FLPA\Files\RTF\. When you click on the Finish button in the Document Wizard, it automatically saves the RTF file using a combination of the file name and the document name separated by a hyphen, *i.e.*:



Smith, Joseph M—Divorce, Complaint for.RTF

Once the document is in your word processor, you can, of course, resave the document using any name you choose. In addition to saving the RTF file, *FLPA2* automatically starts your word processor and opens the completed document. Again, once you are in your word processor you can do whatever you want—change the name of the file, edit and print it, save it in a different location or save it as a different file type, *ie.*, DOC for *Word* or WP for *WordPerfect*.

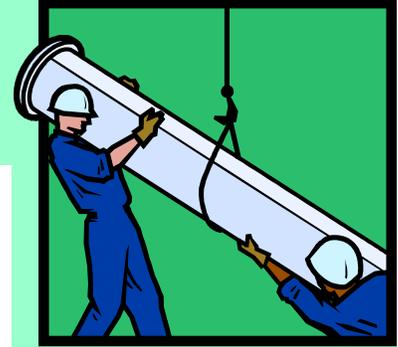
When we ship *FLPA2*, it defaults to using Microsoft's *Word for Windows* as its word processor. We do this because Microsoft created the RTF standard and, in our

experience, *Word* handles RTF files the best. However, any *Windows* word processor capable of opening a rich text format file (RTF) can be used via the **Options** menu's **Set Word Processor** command. Consult the help file's related topics for additional information on these issues.

A good thing about storing your files the **Files** folder is all your client information and completed documents are in one location that is convenient for organizational and backup purposes. This location can be set on the **Options** menu and therefore opening and saving your **FL2** files is automatic, quick and easy. The other important location is the **RTF** subfolder of the **Files** folder. It contains all your completed word processing documents. Of course, once the completed document is assembled and transferred to your word processor, you can save it anywhere you want. Consider however that there may be an advantage to having all your RTF documents in a single location.



Installation



In General

Install *Family Law Practitioner's Apprentice—Version 2+ (FLPA2)* to your computer by following the steps outlined in this section. Before starting the installation, note that the files on the distribution compact disk (CD) are compressed, and therefore, you must “install” *FLPA2* to your computer rather than simply copying the files from the CD to your hard drive. For that same reason, you cannot run *FLPA2* from the CD. You must install *FLPA2* to your computer.

Network Computers. *FLPA2* is an ordinary 32-bit *Windows* program. It is not a “network” program in the sense that it permits simultaneous access to the same file by multiple users. However, *FLPA2* runs on network installations so long as you have purchased a network license. In the case of network computers, the types and implementations are diverse and we cannot give network-specific technical support although we occasionally answer questions *about FLPA2* to assist network administrators on issues involving installation and setup if you have purchased a network license. If you have installation questions or problems regarding network installation issues, please contact us.

Installing *FLPA2*

- A. Place the *FLPA2* disk in your drive.
- B. On most systems, installation will begin automatically, however, **if the installation wizard does not start automatically**, follow these three steps:
 1. Press the Start button;
 2. Click on the Run item; and
 3. In the Run dialog, type the command shown below. **Note** that the CD drive is not always assigned the letter “D” on all systems. **You must use the correct drive letter for your system.**

D:\SETUP.EXE

- C. The Setup progress meter will appear briefly until the Welcome dialog appears. Click the Next button to proceed with installation. Follow the standard *Windows* installation protocol by making sure all other programs/applications are turned off— not just minimized (still on your task bar), but terminated. Click Cancel if you want to abort installation.

D. The **Puritas Springs Software Licensing Agreement** appears in the next dialog. Review the agreement and click the button labeled “I accept the terms in the license agreement.” then press the **Next** button to accept the terms and conditions of the license and continue with the installation. If you do not agree to the terms of the Licensing Agreement, you will not be able to continue installing the program

E. Verify your user identification information and click the **Next** button.

F. The **Setup Type** dialog will appear next. Here you need to select the **Setup** type that best suits your needs. There are three to choose from and they include: **Typical Set-up**, where all program features will be installed (This requires the most disk space), **Minimal Set-up**, where the minimum required program features will be installed, and **Custom Set-up**, where you choose which program features you want installed and where they will be installed. Recommended for advanced users. **Choose Typical and click on the Next button to continue.**

G. The **Ready to Install** dialog signals the end of the installation process and lets you verify your installation parameters. When you are sure everything is correct, click the **Install** button.

H. As installation begins a progress meter will keep you informed as the **FLPA2** files are transferred from the CD to your hard drive.

I. The **InstallShield Wizard Completed** dialog notifies you when the installation process is successfully completed. Click on the **Finish** button.





1. Download the Upgrade.

- A. Click on *FLPA2*'s Help menu and select Download Upgrade.
- B. In the Download Upgrade dialog box, click on the Check Availability button. Note that some systems, typically networks, may have security software and/or hardware in place that prohibit downloading executable files. If this is true in your office or you are having problems with the download, check with your network administrator.
- C. After clicking the Check Availability button, you may get one of three responses.
 - 1) You are notified that a newer version is available and the Check Availability button changes to a Download Upgrade button. Click on Download Upgrade button and see the file downloading.
 - 2) You are notified that there is no newer version available, in which case, you're done.
 - 3) A message indicates an error, *i.e.*, "HTTP Get Failed." Talk with your network administrator or send in your disk according to our instructions on the Current Versions page of our web site: www.puritas-springs.com.

2. Remove *FLPA2*. First, it is important to know that removing the *FLPA2* program using *Windows*' Add/Remove function will not delete or harm your client files. That being said, you should always back up the Files subfolder that contains the client files. The default path is C:\Puritas\FLPA2\Files\.

Below are the steps for removing the prior version of *FLPA2*. Note that when we refer to "prior version" we are not referring to *Version 1*.

- A. Exit the *FLPA2* program.
- B. Click on the Start button. From the Start menu select Settings, and then Control Panel. Note that in some *Windows* versions, you may need to navigate to Control Panel in a different way. However, once in Control Panel, double-click the Add/Remove Programs icon. If you don't see the Add/Remove Programs icon, you may need to click on the Classic View link.

Special Note to Vista Users: The Add/Remove icon in Control Panel is now called Programs and Features in Classic View and Programs\Uninstall a program if you're not in Classic View.

- C. Select FLPA2 from the program list within the Install/Uninstall tab. With the FLPA2 item highlighted, click the Add/Remove button (*Vista* has an uninstall link at the top of the window instead, but the removal process is essentially the same as described herein).
 - D. When the Welcome dialog appears, click the Next button to begin the removal process.
 - E. The next dialog box to appear is titled Program Maintenance. When it appears, click the radio button next the Remove item, and then click the Next button.
 - F. Remove the Program is the next dialog box to appear. The *InstallShield Wizard* will begin to remove the old **FLPA2** program when you click the Remove button.
 - G. You are notified when the removal function is complete. In the dialog box that appears, click the Finish button to close the *InstallShield Wizard*
3. **Install the New Version.** The final step in the upgrade process is to install the new version by executing the file you downloaded. The name of the downloaded file is **setupflpa2.exe** (note that sometimes the **exe** extension is hidden) and when you download it, it is stored at **C:\Puritas\FLPA2\Files**. When you find the file, double-click on it and follow the installation instructions described earlier in this manual. If you don't know how to find the file, try following these steps:
- A Go to My Computer
 - B Double-click the C:/ or Local Hard Drive icon.
 - C Double-click the Puritas folder.
 - D Double-click the FLPA2 folder.
 - E Double-click the Files folder.

In the Files folder you should see the **setupflpa2.exe** file. Double-click on it to begin installation.

Entering Information A Tutorial

As you begin this tutorial, keep in mind that you start entering client information in *Family Law Practitioner's Apprentice—Version 2+ (FLPA2)* and end up with completed documents in your word processor. Along the way you will be working with two types of files. First is the client file—the FL2 file that was described in the “Getting Started” section of this manual. The second is the completed document file, for example, a divorce complaint or separation agreement or judgment entry. **You create a new client file together with all its derived documents by following the steps outlined below.**



Step 1 Enter Attorney Information & Select Your Client

The Attorney Information Dialog appears when you click on this step in the [Main Window](#). The dialog has two functions:

1. It allows you to enter the attorney's name, address and other identifying information that can be used over and over from one client file to the next. The attorney information is not stored in the client file. Instead it is stored as global defaults that are used for every new file.
2. The dialog has two representation buttons that allow you to send the attorney information to the [General Information Worksheet](#) as representative of either the Plaintiff/Petitioner 1 or Defendant/Petitioner 2.

Note that you cannot use the representation buttons until you have completed the attorney information fields because if you haven't completed the information fields, there's nothing to send to the General Information Worksheet anyway.

Step 2 Complete the General Information Worksheet

After you have indicated the party you will be representing in Step 1, the next step involves completing the General Information Worksheet. The information entered on the General Information Worksheet is basic information that reappears on most every other family law document, form and pleading in *FLPA2*. The information you enter on this worksheet transfers automatically to the other documents. A good example is the case number. When you enter the case number on the General Information Worksheet, it automatically appears on every other document, form and pleading that contains a case number field -- and most do. That's why we consider the General Information Worksheet one of the first places you should enter information. You won't need much guidance to make your way through the worksheet. Simply tab from field to field and make your entries.

IMPORTANT NOTE : One often overlooked thing to note is that if you wish to tab backwards, hold the <SHIFT > key down while you tab.

Step 3 Naming & Saving Your File

It's always a good idea to name your file right away, and now is as good a time as any. When you select this item in the **Main Window**, you'll see the standard *Windows Save As* dialog. This dialog has been a common and familiar *Windows* component for years.

When you name your file it's good to keep a few points in mind.

1. The rule of thumb about saving is - early and often.
2. Always use the **FL2** extension.
3. It's best to save your **FL2** files in the **Files** folder located by default at:
C:\Puritas\FLPA2\Files.

IMPORTANT NOTE. Now is as good a time as any to explain the two types of files you will be saving when you use **FLPA2**:

1. When you save a file using **FLPA2**, you are saving a **FL2** file that contains the following information:
 - Entries made on the [General Information Worksheet](#) ,
 - Entries made on the six database worksheets (**Child, Third Party Defendant, Asset, Debt, Income & Expense**),
 - Any answers you typed in any and all of the **Document Wizards**; and
 - Any fields you completed on the static forms.
2. When you use the [Document Wizard](#) and click on the **Finish** button, you are transported to your word processor. Any file you save at that point is an ordinary word processing file.

Step 4 The Database Worksheets

There are six worksheets in **FLPA2** that we refer to as database worksheets. They are different from the [General Information Worksheet](#) in that they are designed to manage an infinite amount of information in the same way that a spreadsheet or database is used to process data records. Here are the six database worksheets:

1. **Child Worksheet** - used to list the names, dates of birth, social security numbers and other information about the children of the marriage.
2. **Third Party Defendant Worksheet** - used to list the names and addresses of parties that have control or an interest in marital property or property from which support obligations may be satisfied.
3. **Asset Worksheet** - used to list the marital and non-marital assets.
4. **Debt Worksheet** - used to list the debts of the parties - joint and separate.
5. **Income Worksheet** - used to list the parties' sources of income.
6. **Expense Worksheet** - used to list the parties' expenses.

The following comments apply to all six database worksheets.

When you first view an empty worksheet, there's one blank record in it. You begin by completing that first record and then adding and completing more records as required. Here's some suggestions to keep in mind when making entries in the worksheet.

- You can only enter information on the top part of the screen, the bottom half is for viewing multiple records, navigating, sorting, *etc* .
- When you're done entering or modifying a record, send your information back to the table below by clicking the [Save To Current Table Row](#) button. Clicking this button takes the information on the top part of the screen and moves it to the currently selected row in the table on the bottom half of the screen. The hot key combination for performing this function is <CTRL><T>.
- You can navigate, view multiple records, sort the table, and select a record for editing on the bottom part of the screen -- the part that looks like a spreadsheet.
- Use <CTRL><F> to find things quickly.
- Almost every function in the worksheet can be implemented using hot keys. There is a right-click, popup menu that has all the commands along with the hot key combinations.
- Each of the columns in the worksheet can be resized by dragging and sliding the dividing bars between columns to the left to make a column smaller and to the right to make a column wider. This allows you to customize the worksheet for your particular computer monitor and screen resolution. *FLPA2* remembers your settings the next time you use it.
- The entire table can be sorted by any of its rows by simply clicking your mouse on the column title. The sorted column has a caret mark (^) next to the column title.
- The worksheet preserves any carriage returns you enter in the **Description** input box.
- Hot key combination for working faster:
 - <CTRL><A> - Same as clicking on the Add at End button.
 - <CTRL><T> - Same as clicking on the Save to Table button.
 - <TAB> - you can use tab to move from field to field.
 - <SPACEBAR> - toggles the checkboxes on and off.

- <ARROW KEYS> - can be used to make selections in the drop-down list boxes; used in the Date field as well.

Step 5 Prepare Forms and Documents

With the worksheets completed, you are ready to prepare any of the available forms, documents and pleadings. How you prepare a form or document depends on whether it is a *static form* or a *free-flowing document*. Here's the difference and how to complete each.

Static Form - A static form has its fields in the same location. The [General Information Worksheet](#) is an example. The fields on the General Information Worksheet all have a permanently defined x/y coordinate. The Defendant's Last Name field, for example, is always against the left margin about half way down the page. The location of the Last Name field never varies. When you complete a static form, you select it from the Document/Form menu and the form appears on your screen. You tab from field to field and complete the form. When you are ready to print it, you can do so by using the Print menu on the file menu or clicking on the Print button on the tool bar near the top of the screen. Below is a list of static forms.

- General Information Worksheet
- Financial Disclosure Affidavit
- Pretrial Statement
- Parenting Proceeding Affidavit
- Private Health Insurance Questionnaire
- Guidelines for Ex-Parte Temporary Restraining Orders
- Practitioner's Instructions for Service
- Service Instructions to Clerk of Courts

Documents - Documents, by contrast, are free-flowing. A Separation Agreement is a good example. In some cases there are children, sometimes not. Some married couples own real estate, others do not. Some marriages involve dividing many assets, others involve none. The existence or lack of these items all contribute to the variable length of the document. In some instances, the signature lines might fall on page 3. Other, more complicated Separation Agreements, might have their signature lines on page 15. Documents are completed by choosing the document from the [Document/Form](#) menu or using the [Main Window](#). When you select a document, it does not appear on your screen like static forms do. Instead, a [Document Wizard](#) appears and solicits information about the document. When the last page of the Wizard is complete (or the Finish button is clicked), your word processor appears and the completed document is opened. Viewing, editing and printing is all done in your word processor and not in *FLPA2*. Every available choice on the Document/Form menu is a document with the exception of the static forms listed above.

Step 6 Printing

How you print depends on whether you are printing a static form or free-flowing document. Static forms are printed by using *FLPA2's* Print This Form button or by using *FLPA2's* Print menu. Free-flowing documents are printed from your word processor.

One More Thing—Setting Defaults

There is one thing you can do to expedite your document processing even more—set defaults. To anyone who owns any of our other legal programs, setting defaults should be a familiar process. In *FLPA2*, you can prime or seed new files so that they contain General Information Worksheet data (*i.e.* static form data) *and* Document Wizard answers that don't change from client to client.

In terms of the General Information Worksheet here are a few examples. Starting from the top, there's the Subtitle field. That's the line in the case caption between the first line and the county line:

IN THE COURT OF COMMON PLEAS
DOMESTIC RELATIONS DIVISION
CUYAHOGA COUNTY, OHIO

The subtitle line is the second line—DOMESTIC RELATIONS DIVISION. The Agency/Department handling support/arrearages is next. This entry could be the “Department of Job & Family Services” or the “Child Support Enforcement Agency.” The County field is another example. If you do 90% of your family law practice in one county why not make that county the default. In the event you need to, you can always change it easily enough. The four residency checkboxes might be other good candidates. Check them by default. If you need to uncheck them for a particular client's file, you can always do so.

The next set of potential defaults would be the Document Wizard answers. Signature dates at the end of documents and in notary clauses could be primed with underscores (_____). This is just one example of many. **The test is that if you find yourself making the same entries in different client files, such entries should be made defaults.**

So how do you make a default? It's easy. Open the DEFAULT.FL2 file by clicking on the File menu's Open command. It's just like opening any other file. Once you're in the DEFAULT file type your default answers in the General Information Worksheet and any Document Wizards you wish to set. Don't forget to press the <TAB> key after each entry. When you're finished entering your defaults, press the Save button. Once you've saved your changes, use the File menu's New command to get out of the DEFAULT file. Setting defaults may take some thought and time, so be aware that you don't have to set all the defaults at once. You can open, add to, and save the DEFAULT file any time.

Another time-saver could be modifying *FLPA2*'s document templates. Let's say that you always use certain language in your shared parenting plans. You could use the Option menu's Modify Templates command and insert your special language into the Shared Parenting Plan template so that the change would be a permanent part of *FLPA2* and you would not need to insert that language on a document-by-document basis. Beware, however, that it's relatively easy to corrupt a template so consult the help file on this topic and be careful.

Don't Neglect The Help Files

This paper manual is merely an outline of the basics of installation, getting started and a tutorial on basic information entry. You can get additional help via the program's Help|Table of Contents menu. This program has context-sensitive help. That means that you get help on a specific menu item without searching for that topic. Simply highlight the menu command and press **F1**. Other objects on your screen may have associated help topics. When in doubt, move focus to the component object and press **F1**.

Note. The mouse won't work to highlight a menu command. You must use the keyboard. To give an example, if you wanted help with the **Save As** command you would press **ALT F** to pull down the **File** menu, and use the arrow keys to highlight the **Save As** command. With the command highlighted press the **F1** key.

If you're like us, you might be doubtful as to whether help files can be truly helpful. Regardless of any drawbacks, we found them to have significant benefits over their paper counterpart.

Help Is Always There

When we were at the office, the manual was at home. When we were on the computer at home, the manual was at the office. On unfortunate occasions, that alone can make you lose a day's work. It never happens with help files. They're always there. A copy for your home computer, and a separate one for the office. Ditto for your laptop! When you're desperate for information, you can always count on its accessibility.

Help Is Hyperlinked, Searchable & Better Indexed.

We took extra time to develop a logical system of indexing. You should find that a help file's searchability can be a time-saver when you're looking for a snatch of text. The point and click links between key words provide instant information without fumbling through page after page looking for something. This **non-linear** characteristic is part of what makes help files so uniquely useful.

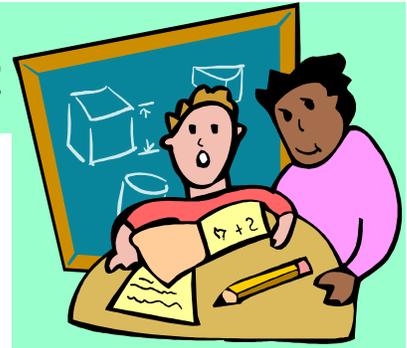
Help Is Up To Date

Because they are printed in large quantities, paper manuals fall out of synch with last-minute or late-minor programming changes. Help files, on the other hand, are easier to keep current with programming changes because their modification involves no additional processing steps to implement (*i.e.*, physical transportation, printing, binding, *etc.*).

Paper Fix

Don't forget that you can print any help topic by pressing the help window's Print button, or using the menu's Print Topic command.

Essential Help Topics



Checking out these help topics before starting *FLPA2* will reduce the slope of the learning curve. Although *FLPA2* is relatively straightforward to use, you may find that you can be more efficient by becoming acquainted with the help topics listed below.

Setting Defaults

Some information doesn't change from file to file. The county you practice in, for example. This help topic shows you how to set this type of information globally so you needn't enter it every time you start a new file.

Modifying Templates

This help topic explains how you can customize some of the free-flowing documents so as to automatically include personalized language. This is another form a global change that lets you avoid making additions to documents every time you send them to the word processor.

Static Forms vs. Free-Flowing Documents

You really need to understand the difference between these two if you're going to use *FLPA2* successfully and productively.

Overriding

Occasionally certain static form fields will not be populated with the information you want. Overriding these fields is how you can force *FLPA2* to do what you want.

Client Worksheets

These blank worksheets are useful to both your client and you. Don't overlook their utility.