

Conscious Guide to

# SecureForms

*Speed up workflow and make efficiency gains at the same time*



conscious

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# 1 Overview

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The purpose of this document is to provide a general guide to a sophisticated new product called SecureForms.

***The screen shots contained in this document are from a technical specification of the product and represent a relatively crude "wireframe" and do not represent the final look of the product – design work on the user interface. The finished product is expected to be available in Q1 2011.***

*Clients increasing expect to provide information electronically.*

The purpose of SecureForms is to provide a more effective method of capturing information from Clients.

Increasingly Clients want (and even expect) to provide information electronically and prefer to invest their own time in doing what they can rather than incur the time of their Solicitor unnecessarily.

*The problem with traditional web forms for electronic capture.*

Some law firms have tried to address this issue with traditional online forms but these suffer from many problems:

- They are normally not secure i.e. not protected by a Secure Certificate (an https://) domain
- The forms are often very long and Clients can't usually save the form for completion at a later time
- Data validation is awkward – fields are often treated as required which the Client may be uncertain about
- There is no ability to communicate with the Solicitor during the form-completion process

*SecureForms offers a completely different user experience.*

We've looked at the entire problem and designed a solution from the ground up. We want the Client's experience to be pleasurable and for the interaction between Client and Solicitor to be enhanced not eliminated.

A range of sophisticated features seeks to make the entire process not only efficient but even pleasurable!

*Don't lose the personal touch.*

Contact details of the Solicitor are always readily available.

*Making it easy for your Clients.*

Fee Earners can partially complete a form on behalf of the Client or add comments to specific questions to help clarify matters as far as possible for the Client.

*Not sure – don't worry!*

When Clients are completing a SecureForm they can skip questions that they might be uncertain about and leave comments/questions for the Solicitor to be discussed at a later stage.

Questions are defined as required, requested or optional. When skipping a "requested" field the Client is prompted to add a comment.

*Multi-media help.*

Help resources can be associated with each form, each page, each section, each group and each question. Help resources can be text, audio or video.

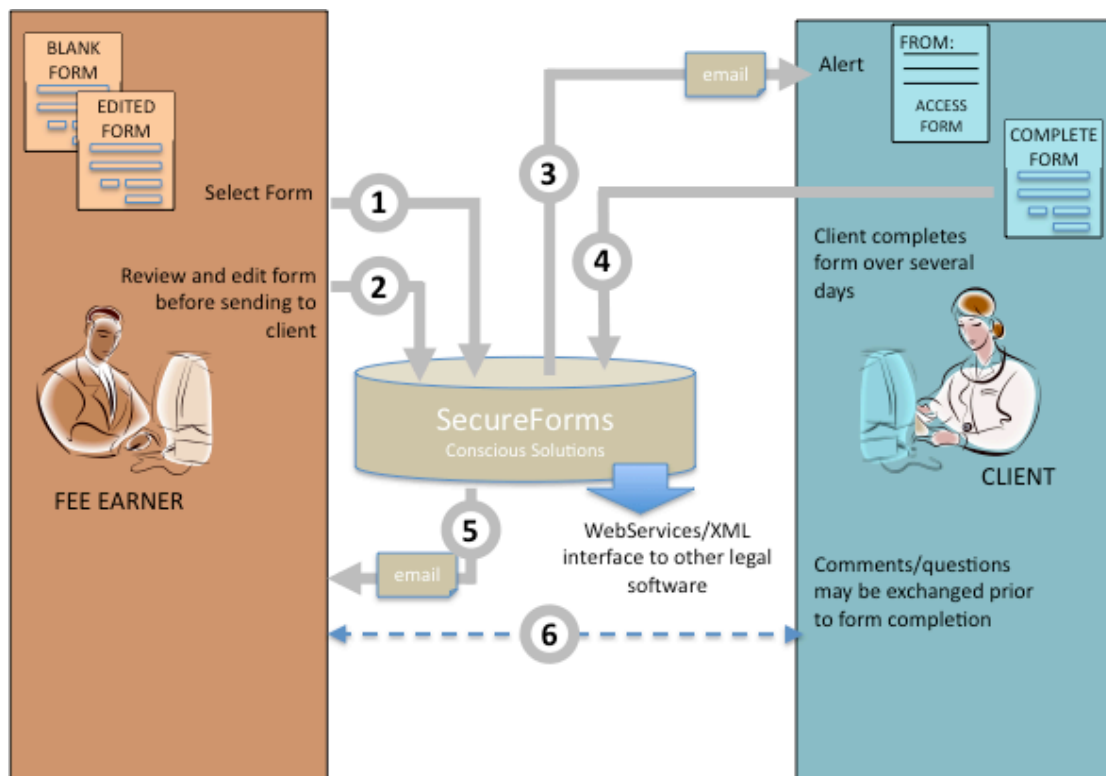
*Email Alerts.*

Fee Earners receive an alert whenever a Client completes a form. The alert contains all the links needed to quickly review the form and accept it or return it to the Client (with comments) for further input.

*Interface with other legal software.*

SecureForms is a modern, standards-compliant application that expects to be integrated with a wide range of different legal software. It has a Web Services interface and XML data structure to make this process as easy as possible.

SecureForms is available to existing Clients as an extension to the Content Management System (CMS). However, it can also run "stand alone" for Law Firms who are not hosting their website with us.



## 2 Typical Workflow

In most cases a Solicitor initiates the process by explicitly sending a particular form to a Client, but is also possible for the Client to initiate the process themselves directly from the website (perhaps in response to a "Start your will now") advert.

*Following login, the Solicitor is invited to view "work in progress" or "send a new form".*

BARLOW ROBBINS LLP  
Solicitors

| Your forms |   | All forms |
|------------|---|-----------|
| Sent       | 7 | 18        |
| Returned   | 3 | 9         |

**Welcome**  
Welcome to back Simon Moss - login successful.

Send a new form to a client

Review Work-in-Progress

This is as a very simple, non-threatening homepage that ALL Solicitors would find easy to use.

*Having selected which form to send to a Client the Solicitor can adjust the standard text of the email that will be sent to the Client.*

BARLOW ROBBINS LLP  
Solicitors

| Your forms |   | All forms |
|------------|---|-----------|
| Sent       | 7 | 18        |
| Returned   | 3 | 9         |

**Send a New Form**

**Select the client**

Email address

First name

Last name

Client ID

**Or create a new one**

Email address

First name

Last name

Address

City

Postcode

Email address

**Select the Form**

Divorce, separation and dissolution

**Edit the standard message sent with this form**

Further to our conversation, it would be most helpful if you could complete this form (at least the sections that you can) and send it back to me before we meet.

Yours sincerely,  
Simon Moss

Person responsible? Simon Moss

Case reference

Generate Form

The Solicitor uses this page to select the Client and determine which form to send to them. If the Client's email address is not found a new Client record is created. The Solicitor responsible is assumed to be the person who is sending the form, but it can be adjusted (so for example, a PA can send the form on behalf of a Fee Earner).

*Having created a new form the Solicitor has the opportunity to complete parts of the form on behalf of the Client.*

*The Client receives an email linking them to the form.*

*The first time they access the form they have to select a password but once this has been done is they reach the form itself.*

*Each instance of a form is always associated with a specific Fee Earners – maintaining the personal approach.*

Forms are intuitive and easy to use.

A Table of Contents is always visible for fast navigation to specific sections.

When necessary, help appears in the right hand column. Help can be text, audio, or video.

Form name: Divorce and separation  
Client name: Samantha Gilroy  
Reference: K12345/RT  
[Send form to Barlow Robbins](#)

**Table of Contents** Progress

| Title                               | Progress |
|-------------------------------------|----------|
| <b>1 - Your Details</b>             |          |
| Name                                |          |
| Current address                     |          |
| Correspondence address              |          |
| Occupation                          |          |
| <b>2 - Spouse/Partner Details</b>   |          |
| Name                                |          |
| Current address                     |          |
| Correspondence address              |          |
| Occupation                          |          |
| <b>3 - Court</b>                    |          |
| Details of court proceedings        |          |
| <b>4 - Marriage/Partnership</b>     |          |
| Details of the marriage/partnership |          |
| Children                            |          |
| Health issues                       |          |
| <b>5 - Financial Matters</b>        |          |
| The matrimonial home                |          |
| Other joint capital and income      |          |
| Your capital and income             |          |
| Partner/spouse capital and income   |          |

**Contact Details**

**Your Name**

1.n.n First name

1.n.n Middle name(s)

1.n.n Surname

Any former surname?

**Your Current Address**

1.n.n Line 1

1.n.n Line 2

1.n.n Line 3

1.n.n Town

1.n.n County

1.n.n Postcode

1.n.n Country

**Correspondence Address**  Same as current address

### 3 Technical Information

#### Security

All communication runs as https:// and is fully encrypted.

Passwords or other personal information is never sent via email.

The system automatically creates user accounts for all new Clients based on their email address. However, the first time a Client uses the system they are required to set a password which is then required on all subsequent visits.

#### Integration via WebServices and XML

All forms are defined in XML. Response data is also stored in XML. A Web Services interface is available for those Clients who want to integrate the application into existing legal software.

Forms contain **questions**. These can be organised into **groups** which themselves are associated **sections** and **pages**.

Form name: Divorce and separation  
Client name: Samantha Gilroy  
Reference: K12345/RT  
Send form to Barlow Bobbins

<< 1 2 3 4 >>

**PageTitle**  
PageHeader text (optional) appears at the top of the page immediately below PageTitle. Lorem ipsum dolor sit amet, sapien etiam, nunc amet dolor ac odio mauris justo. Luctus arcu, urna praesent at id quisque ac. Arcu massa vestibulum malesuada, integer vivamus elit eu mauris eu, cum eros quis aliquam nisi wisi.

**SectionTitle**  
SectionHeader text (optional) appears at the top of the section immediately below SectionTitle. Lorem ipsum dolor sit amet, sapien etiam, nunc amet dolor ac odio mauris justo.

**GroupTitle (optional)**  
GroupHeader: Questions belongs to groups which can have titles and descriptions but normally groups are used for other (more technical) purposes. GroupTitle and GroupHeader will often be blank.

QuestionHeader: can exist but not often used

1.n.n **QuestionTitle**

QuestionDescription: Some questions may need more descriptive information - if present it appears here.

QuestionComms: The user may add comments to any response. If present they appear here.

QuestionFooter: can exist but not often used

A wide range of question types can be used in the forms including

- Text
- Rich Text
- Radio buttons
- Drop-downs

|   |                                    |   |
|---|------------------------------------|---|
| <b>Text (single line)</b>                             |                                    |   |
| 1.n.n   | First Name                         | Samatha   |
|   |                                    | Control over the max. num of characters   |
| <b>Text (multi-line but less than 255 characters)</b> |                                    |   |
| 1.n.n   | Schools attended                   | Bristol Grammar School<br>Hartfield School<br>Clifton School  |
|   |                                    | Control over the number of lines  |
| <b>Text (essay)</b>                                   |                                    |   |
| 1.n.n   | Brief description of your accident | <p>Lorem ipsum dolor sit amet, sapien etiam, nunc amet dolor ac odio mauris justo. Luctus arcu, urna praesent at id quisque ac. Arcu massa vestibulum malesuada, integer vivamus elit eu mauris eu, cum eros quis aliquam nisl wisi.</p> <p>Lorem ipsum dolor sit amet, sapien etiam, nunc amet dolor ac odio mauris justo. Luctus arcu, urna praesent at id quisque ac. Arcu massa vestibulum malesuada, integer vivamus elit eu mauris eu, cum eros quis aliquam nisl wisi.</p>                           |
|   |                                    | Control over the number of lines  |
|   |                                    | Vertical scroll bar appears if the user enters more data than space allows  |
| <b>Text (rich text)</b>                               |                                    |   |
| 1.n.n   | Brief description of your accident | <p><b>B</b> <b>I</b> </p> <p>Lorem ipsum dolor sit amet, sapien etiam, nunc amet dolor ac odio mauris justo. Luctus arcu, urna praesent at id quisque ac. Arcu massa vestibulum malesuada, integer vivamus elit eu mauris eu, cum eros quis aliquam nisl wisi.</p> <p>Lorem ipsum dolor sit amet, sapien etiam, nunc amet dolor ac odio mauris justo. Luctus arcu, urna praesent at id quisque ac. Arcu massa vestibulum malesuada, integer vivamus elit eu mauris eu, cum eros quis aliquam nisl wisi.</p> |
|   |                                    | Control over which version of the toolbar to display (simple vs. full)  |
|   |                                    | Control over the number of lines  |
|   |                                    | Vertical scroll bar appears if the user enters more data than space allows  |
|   |                                    | Useful the user needs to emphasize words or enter hyperlinks.   |
|   |                                    | User can also paste-from-Word to provide tabular data   |