

conscious

brand, design & marketing for law firms

Conscious Guide to

SecureForms

Speed up workflow and make efficiency gains at the same time



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1 Overview

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

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.

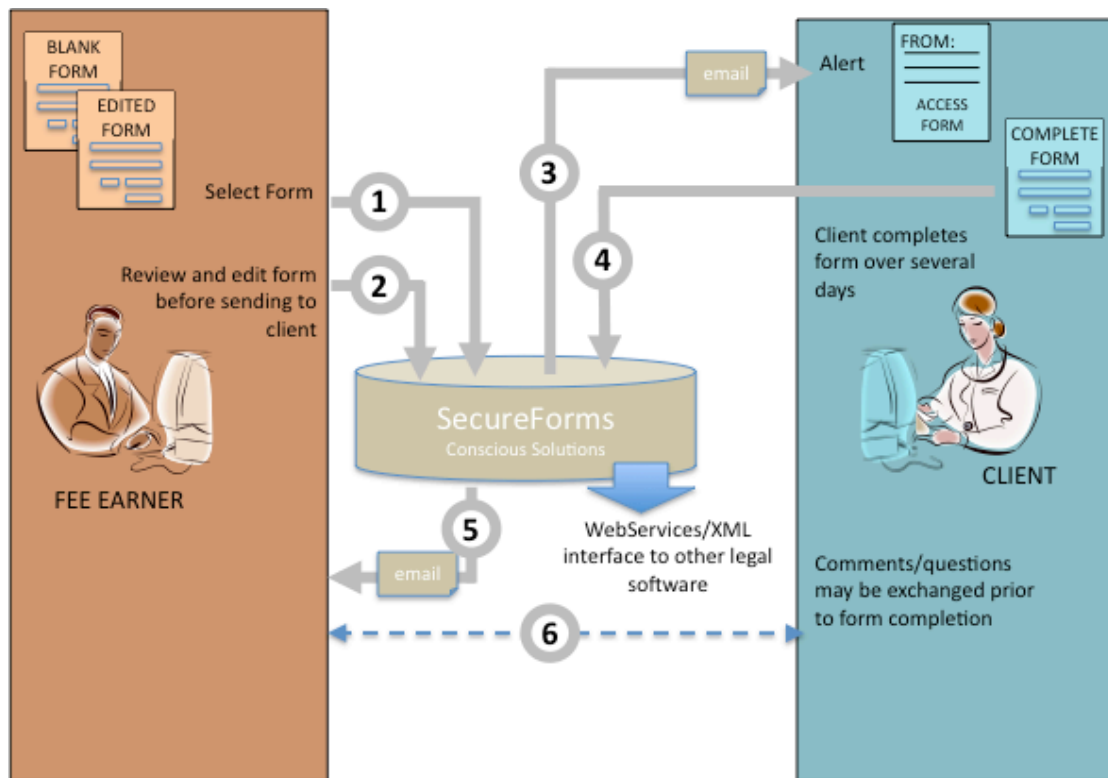
Email Alerts.

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.

The main screen provides an overview of work-in-progress and status (i.e. whether the form is with you or with the client).

The screenshot shows the main interface of the Wards Solicitors system. On the left is a sidebar with navigation options for 'Forms' and 'Library', and a search bar. The main content area displays a table titled 'Most recent 25 forms.' with columns for Client, Solicitor, Form, Reference, and Status. A 'Create New Form' button is located at the top right of the table. On the far right, a green sidebar provides 'Available options for the selected form', including buttons for 'View Form', 'Download Data', 'Email Client', 'View Activity', 'Change Status', 'Check Data', and 'Change Solicitor'.

Client	Solicitor	Form	Reference	Status
Wards Demo3	Ian Williamson	Debt Recovery - 7 day Letter Before Action	DR7-2	Client
Kevin Glass	Ian Williamson	Debt Recovery - 7 day Letter Before Action	UF5201105201417	Client
Clare Fanner	James Taylor	Debt Recovery - 7 day Letter Before Action	UF5201105191353	Client
Clare Fanner	Nigel Murray	Will Questionnaire	UF4201105191352	Solicitor
Julie Burbidge	James Taylor	Debt Recovery - 7 day Letter Before Action	UF5201105190951	Solicitor
Kevin Glass	Ian Williamson	Debt Recovery - 7 day Letter Before Action	UF5201105181446	Solicitor
Andrew Gray		Preparing a will (standard)	123	New
adam davidson	Katherine Roe	Will Questionnaire	UF4201105171420	Client
Andrew Test		Divorce - Financial Statement	123456	New
adam davidson	Katherine Roe	Will Questionnaire	UF4201105161759	Solicitor
Andrew Test	James Taylor	Divorce - Financial Statement	12345	Solicitor
Andrew Test	Jenny Pierce	Will Questionnaire	UF4201105112025	Client
Kevin Glass	James Taylor	Debt Recovery - 7 day Letter Before Action	UF5201105101713	Solicitor
Kevin Glass	Alison Bradley	Will Questionnaire	UF4201105101434	Solicitor
tom bevan	Katherine Roe	Will Questionnaire	UF4201104271118	Client
Eamonn Boylan	Alison Bradley	Will Questionnaire	UF4201104200928	Client

To send a form to a client the Solicitor first selects the form from the library...

The screenshot shows the 'Library' view of the Wards Solicitors system. The sidebar on the left is identical to the main screen. The main content area displays a list of 5 forms under the heading '5 forms'. The forms are categorized into 'Debt Recovery', 'Divorce', and 'Wills'. The 'Preparing a will (standard)' form is highlighted in green. A 'Create New Form' button is visible at the top right of the library view.

5 forms	
Debt Recovery	
Debt Recovery - 7 day Letter Before Action	Debt Recovery - 7 day Letter Before Action
Divorce	
Divorce	Divorce
Divorce - Financial Statement	Divorce - Financial Statement
Wills	
Preparing a will (standard)	Preparing a standard will
Will Questionnaire	Will Questionnaire

...then selects the client to whom to send the form.

The system send the client an email containing a link to the form

Client	Email	Options
Andrew Test	agray@conscious.co.uk	Select Client
Andrew Gray	agray@conscious.co.uk	Select Client

The Client receives an email linking them to the form.

To: Samantha Jones
From: Simon Mess
Date: 23-Sept-2010
Subject: New form for your attention

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.
<Any additional notes entered by the Fee Earner would appear here>

Access 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.

WARDS SOLICITORS


Client: Clare Fanner
Reference: UF4201105191352

Home

Start
1 - Personal Details
2 - Funeral, Guardians and Executors
3 - Your Assets
4 - Beneficiaries
5 - Signing your will
Finish

Will Questionnaire

If your Will is straightforward we offer an online Will writing service. All you need to do is complete the form and submit it to us. Our team of qualified experts will draft a Will and send it to you for approval. Once you have agreed the draft we will produce the Will for signing and witnessing (which you can do at our offices for no extra cost, if you like).



Nigel Murray
01454 316789

Start

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.

WARDS
SOLICITORS

Client:
Clare Fanner

Reference:
UF4201105191352

Home Save

Start >

1 - Personal Details >

Your Details

Your Husband/Wife/Partner

Your Children

2 - Funeral, Guardians and Executors >

3 - Your Assets >

4 - Beneficiaries >

5 - Signing your will >

Finish >

Will Questionnaire

Next >

Personal Details

Your Details

All Forenames

Surname

Address

Postcode

E-mail address

Date of Birth

Telephone number

Occupation

Have you been married before? Yes No

Your Husband/Wife/Partner

If your husband/wife/partner is making a will they should complete a separate questionnaire

All Forenames

Surname

Address

3 Adding Forms to your Website

In most cases it is the Solicitor who starts the process by sending the form to the Client. However, it is also possible to put particular SecureForms onto your website so that the User can initiate the process. This is often done for Wills forms.

In this case the User is also asked to select a particular office (this information is used to determine which Fee Earner to linked to the form).

The screenshot shows the Wards Solicitors website. The header features the logo 'WARDS SOLICITORS' and the tagline 'YOUR LOCAL LEGAL SPECIALISTS'. Navigation links include 'FIRST TIME HERE', 'ForWards BLOG', and 'CONTACT'. The main content area is titled 'WILL QUESTIONNAIRE' and includes a description of the online will writing service, a list of office locations, and a form to select the nearest office. A sidebar on the right lists 'OUR SERVICES' for both individuals and businesses. Social media icons and a 'KEEP IN TOUCH' banner are located at the bottom left.

WARDS SOLICITORS YOUR LOCAL LEGAL SPECIALISTS
FIRST TIME HERE ForWards BLOG CONTACT

OUR OFFICES

- Bradley Stoke
- Bristol
- Clevedon
- Nailsea
- Portishead
- Staple Hill
- Weston-Super-Mare
- Weston-Super-Mare, Family Law
- Worle
- Yate

WILL QUESTIONNAIRE

If your Will is straightforward we offer an online Will writing service. All you need to do is complete the form and submit it to us. Our team of qualified experts will draft a Will and send it to you for approval.

Once you have agreed the draft we will produce the Will for signing and witnessing (which you can do at our offices for no extra cost, if you like).

Charges for the online Will service are **£110 (plus VAT)** for a single Will and **£180 plus VAT** for two similar Wills.

Select your nearest office. Start now

List all available forms »

OUR SERVICES

For You

- Accident & Injury
- Countryside
- Disputes
- Employee Relocation
- Employment
- Moving Home
- Probate
- Probate Disputes
- Relationship Breakdown
- Wills & Mental Capacity

For Your Business

- Business Disputes
- Business Employment
- Business Relocation
- Commercial Property

KEEP IN TOUCH

4 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, uma 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 hidden.

QuestionHeader: can exist but not often used


1.n.n **Question Title**

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

Text (single line)		
1.n.n	First Name	Samatha
		Control over the max. num of characters
Text (multi-line but less than 255 characters)		
1.n.n	Schools attended	Bristol Grammar School Hartfield School Clifton School
		Control over the number of lines
Text (essay)		
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, uma praesent at id quisque ac. Arcu massa vestibulum malesuada, integer vivamus elit eu mauris eu, cum eros quis aliquam nisi wisi.</p> <p>Lorem ipsum dolor sit amet, sapien etiam, nunc amet dolor ac odio mauris justo. Luctus arcu, uma praesent at id quisque ac. Arcu massa vestibulum malesuada, integer vivamus elit eu mauris eu, cum eros quis aliquam nisi wisi.</p>
		Control over the number of lines
		Vertical scroll bar appears if the user enters more data than space allows
Text (rich text)		
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, uma praesent at id quisque ac. Arcu massa vestibulum malesuada, integer vivamus elit eu mauris eu, cum eros quis aliquam nisi wisi.</p> <p>Lorem ipsum dolor sit amet, sapien etiam, nunc amet dolor ac odio mauris justo. Luctus arcu, uma praesent at id quisque ac. Arcu massa vestibulum malesuada, integer vivamus elit eu mauris eu, cum eros quis aliquam nisi 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