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Introduction to Lexis® Smart Forms

Lexis Smart Forms are automated legal templates that provide trusted up-to-date content delivered on a powerful technology platform. The templates come in the form of interactive interviews that can build documents with the right data and clauses based on user answers. The interviews can support multiple data types, enabling easy population of the document based on interview answers supplied as free text, date selections, radio button selections, etc.

Completed forms built using Lexis Smart Forms can be downloaded as Word files (.docx) or PDF. Interview answers can also be saved and imported into other Smart Forms interviews.

1 Finding Smart Forms

Smart Forms are included in select Lexis Practice Advisor® practice areas. Navigate Lexis Practice Advisor as you normally would, by browsing in the Task List or using the Search bar to find forms. If there are Smart Forms available in your browse or search results list, you will see a "Lexis® Smart Forms" check box at the end of the list of filters. Check the box to see just the Smart Forms in your browse or search results list. Smart Forms are labelled in browse and search results with an information button. Hover over the button to get more information about Smart Forms.
You can see all Smart Forms available on your Lexis Practice Advisor subscription by clicking on the link in the Smart Forms pod on select practice area pages.
2 Accessing Smart Forms

Lexis Practice Advisor forms that have the Smart Forms feature include a "Build Your Document" button at the top of the screen. When you click on "Build Your Document," the start screen will open in your default browser in a new tab or window.

In Delaware, the Certificate of Formation is filed with the Delaware Secretary of State and a filing fee of $90 is paid. Only one filing fee is required to form a Series LLC regardless of the number of series it contains. The form itself is usually a very simple document no longer than one page in length. While the specifics of the Certificate of Formation may vary, every Certificate of Formation must contain the following elements: (i) the name of the LLC; (ii) the address of the registered office; (iii) the name and address of the registered agent in Delaware; (iv) a statement noting the existence and scope of the underlying series within the LLC; (v) a statement providing notice to creditors that their recourse with respect to the liabilities of a series is limited to the assets associated with said series, and not the assets of the LLC generally or the assets of any other series and (vi) the dated signature of an authorized person or the organizer.
3 Interview Progress

Each screen in the interview will show you the name of the form that will be built based on your answers, which topic you are in in the interview, and the number of questions answered and remaining. Answer fields may be free text fields, drop-down menus, radio buttons, date selectors, or check boxes.

<table>
<thead>
<tr>
<th>NO.</th>
<th>ITEM</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Form in Progress</td>
<td>Form title with the additional words “in progress...” indicating that the interview is in progress.</td>
</tr>
<tr>
<td>2</td>
<td>Hide/Show Interview Progress</td>
<td>Click to hide the progress pane. Click again to show the progress pane.</td>
</tr>
<tr>
<td>3</td>
<td>Topic Progress</td>
<td>The topic highlighted in white denotes the topic of the interview that the user is on.</td>
</tr>
<tr>
<td>4</td>
<td>Count of Questions Answered</td>
<td>Indicates the number of questions answered in the interview and the number remaining to be answered. Hover over the red progress bar to check the progress in percentage form.</td>
</tr>
<tr>
<td>5</td>
<td>Topic Title</td>
<td>Title of the topic, which reflects the title in the Topic Progress pane.</td>
</tr>
</tbody>
</table>
4 Navigating the Interview Topics

You can jump from one interview topic to another by clicking on the topics in the Topic Progress pane. If you jump to a different topic, you will see a pop-up box prompting you to commit to your answers in the current screen before jumping (Commit), jump to the new topic without committing to your answers (Jump), or cancel. Select “Don’t ask me again – always take this action” before clicking on Jump or Commit to make it your default action. You can change this setting in your session configuration. Note that by selecting Jump, you will lose the answers you have entered in the current interview topic.

---

<table>
<thead>
<tr>
<th></th>
<th>Answer Field</th>
<th>Text answers should be written here. Other types of answer fields may include radio buttons, check boxes, date selectors, and drop-down menus.</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>Asterisk</td>
<td>Signifies an answer that is mandatory to progress to the next interview topic.</td>
</tr>
<tr>
<td>8</td>
<td>Quit</td>
<td>Quits the Smart Forms interview. The user will be taken to the Lexis Practice Advisor home page.</td>
</tr>
</tbody>
</table>

---

![Certificate of Formation (DE Series LLC) in progress](image)
Jump from the topic 'Advertising Agency -> Signatory' to 'Agreement'?

Your answers have not been saved from this page.

You can choose to:
- jump now, ignoring answers from the page (don't commit)
- commit your answers and jump to this topic if possible
- cancel and use next to proceed with the interview

Jump Commit Cancel

Don't ask me again - always take this action

If you click on the topic you are currently in, you will see a pop-up box that will allow you to reload the topic. This is useful if you want to delete the answers that have been entered into the screen and start over. As with the Jump pop-up box, you can select “Don't ask me again – always take this action” before clicking on Reload to make it your default action. You can change this setting in your session configuration.
Reload the topic 'Agreement'?

Your answers have not been saved from this page.

You can choose to:
- reload the topic, reviewing previously committed answers if any
- cancel and use next to proceed with the interview

[Reload] [Cancel]

☐ Don’t ask me again - always take this action

To go back and forth between interview screens, click the Back or Next buttons. Skip allows you to go from an interview screen to the document preview by skipping all non-mandatory questions.
<table>
<thead>
<tr>
<th>NO.</th>
<th>ITEM</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>Jump pop-up window</td>
<td>Enables the user to navigate to another topic and either (1) commit to the answers before jumping, which will save the answers on the screen or (2) jump without committing, which will delete the answers on the screen. The user can choose to always take one or the other action by selecting “Don’t ask me again – always take this action.”</td>
</tr>
<tr>
<td>10</td>
<td>Reload pop-up window</td>
<td>Enables the user to reload the topic. Any answers written will be lost if the topic is reloaded. The user can choose to always take this action when the current topic is reloaded by selecting “Don’t ask me again – always take this action.”</td>
</tr>
<tr>
<td>11</td>
<td>Back</td>
<td>Takes the user back to the previous screen in the interview.</td>
</tr>
<tr>
<td>12</td>
<td>Skip</td>
<td>Skip to the document preview. If the interview has any mandatory questions that have not been answered, then clicking Skip will show the user the mandatory questions that remain in the interview.</td>
</tr>
<tr>
<td>13</td>
<td>Next</td>
<td>Takes the user to the next screen in the interview.</td>
</tr>
</tbody>
</table>

To go back and forth between interview screens, click the Back or Next buttons. Skip allows you to go from an interview screen to the document preview by skipping all non-mandatory questions.
5 Previewing and Saving Your Document

You can preview your document in two ways: (1) within an interview screen by clicking on "Preview" to see the document with the answers entered so far in the interview and (2) at the end of the interview, when a preview is generated with all the answers supplied in the interview.

The document preview at the end of the interview also includes options for downloading the document to your local drive as a Microsoft Word or PDF file.

You can also save all your interview answers by clicking on the Save button. The Save button is available on all interview screens as well as the document preview, so that you can save your answers at any point in the interview. When Save is clicked, an answer file will be saved to your local drive. The answer file can then be imported into any Smart Forms interview, with answers populating the interview to the extent the fields match what is in the answer file.
Certificate of Formation (DE Series LLC) complete

1. Review the web preview below and click any active text to change your answers.
2. Review the Interview summary at the bottom of this page and click any question to change your answer...
3. When you are happy with the document and your answers, click next to proceed...

Create a Word/DOCX document, containing:
- The document
- Drafting notes
- Interview summary
Open

Create a PDF document, containing:
- The document
- Drafting notes
- Interview summary
Open

CERTIFICATE OF FORMATION
OF
ABC LLC

This Certification of Formation, dated as of the 18th day of September, 2018, is being duly executed and filed by the undersigned to form a limited liability company pursuant to Section 18-301 of the Delaware Limited Liability Company Act (the “Act”).

FIRST. The name of the limited liability company (the “Company”) hereby is
ABC LLC.

SECOND. The registered office of the Corporation in the State of Delaware is located at 123 Fourth St., New York, New York 10001. The name of its registered agent at such address is
ABC LLC.

Interview Summary

Formation
Certificate of Formation Date
September 18, 2018

Limited Liability Company
Name
ABC LLC

This document establishes the following series of members:

Name of Series
[]

Registered Address
Registered Agent Name
Jane Doe
Address
123 Fourth St.
City
New York
State
New York
<table>
<thead>
<tr>
<th>NO.</th>
<th>ITEM</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>14</td>
<td>Preview link</td>
<td>Generates a preview of the document using the currently available interview answers.</td>
</tr>
<tr>
<td>15</td>
<td>Preview pop-up window</td>
<td>Preview of the document generated based on the currently available interview answers.</td>
</tr>
<tr>
<td>16</td>
<td>Summary</td>
<td>A tab within the Preview pop-up window, this shows a list of all the currently available interview answers.</td>
</tr>
<tr>
<td>17</td>
<td>Document Preview</td>
<td>At the end of the interview, the Document Preview shows a preview of the document with all available interview answers, download options, and the interview summary.</td>
</tr>
<tr>
<td>18</td>
<td>Save</td>
<td>Also available on each interview screen, the Save button enables the user to save the answers to the interview to the user’s local drive.</td>
</tr>
<tr>
<td>19</td>
<td>Download options</td>
<td>Allows the user to download the document as a Microsoft Word or PDF file. In addition to the document, the user can include Drafting Notes and the Interview Summary in the download.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Drafting Notes: Additional guidance about select clauses in the document that may not have been addressed in the interview, such as how and why a clause may need to be revised to fit particular situations and filing or service instructions. Not every document will have Drafting Notes.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Interview Summary: A list of the answers the user supplied in the interview.</td>
</tr>
<tr>
<td>20</td>
<td>Active text</td>
<td>When clicked, active text will take the user back to the corresponding question, allowing the user to change the answer. After changing an answer using active text and clicking Next, the user will be taken back to the Document Preview.</td>
</tr>
<tr>
<td>21</td>
<td>Interview Summary</td>
<td>A list of the answers the user supplied in the interview. The user can go back to any of the questions in the interview by clicking on the question names (blue text).</td>
</tr>
</tbody>
</table>
6 Previewing and Saving Your Document

As noted above, the Save button is available on every interview screen the Document Preview at the end of the interview. When the Save button is clicked, you will see a screen prompting you to download your answers to your local drive. You can upload saved answers to a Smart Forms interview by clicking on the link on the first interview screen. Answers will populate in the interview to the extent the answers in the upload match the questions in the interview.

After you click Save you will see this screen, where you will be able to select the location on your local drive to save the answer file:

When you are in a Smart Form into which you want to import your answers from an answer file, click “Import Saved Answers”:

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You will be taken to a screen from which you can select the answer file on your local drive to import into the interview.