



Lexis® Smart Forms

Advancing what's possible

FREQUENTLY ASKED QUESTIONS

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WHAT ARE LEXIS SMART FORMS?

Lexis Smart Forms are simple questionnaires that generate a document based on your responses. Answers to questions about specific aspects of the transaction will add the appropriate language to the document. Data you enter about the transaction, such as party names, dates, prices, and amounts, are added to the form in every place they should appear. Smart Forms save you the burden of finding and putting together the necessary elements of a document, thus freeing you up to focus on the legal details of the transaction. Each questionnaire contains detailed relevant guidance throughout to ensure that we help you fully understand the legal implications of the questions being asked and the responses you are giving.

HOW DO I ACCESS LEXIS SMART FORMS?

Lexis Smart Forms are included in select Lexis Practice Advisor practice areas. 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. You can also find Smart Forms by browsing or searching for precedents in Lexis Practice Advisor. Navigate Lexis Practice Advisor as you normally would, by browsing in the Topic List or using the Search bar to find precedents. 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.

To start using a Smart Form, click on the title of the form in the browse or search list. At the top of the document you will see a Smart Form banner and a “Build Your Document” button. Click on “Build Your Document” to open the Smart Form questionnaire.

HOW DO I DOWNLOAD A DOCUMENT CREATED WITH LEXIS SMART FORMS?

At the end of the questionnaire, Lexis Smart Forms will generate a document preview showing the form created by the answers provided by the user. The preview page includes options to download the document in Microsoft Word or PDF. You can choose to download the document only or the document with the Interview Summary (a list of the answers provided by the user) and Drafting Notes (if available).

CAN I SAVE THE ANSWERS I GAVE TO A LEXIS SMART FORMS QUESTIONNAIRE?

Yes. Click “Save” at any point after the first screen of the Smart Form to save all answers provided up to that point. A screen will prompt you to save a file to your local drive.

CAN I REUSE THE ANSWERS I GAVE TO A LEXIS SMART FORMS QUESTIONNAIRE?

Yes. On the first screen of a Smart Forms questionnaire, click “Import saved answers.” A screen will prompt you to upload an answer file from your local drive. The answers will then populate the current questionnaire to the extent the answers in the upload match the questions in the questionnaire.

WHICH WEB BROWSER DO I NEED?

The minimum browser requirements for creating documents using Lexis Smart Forms are Internet Explorer 11 and above, Safari 11.1.2 and above, Mozilla Firefox 53 and above, and Google Chrome 61 and above.

WHY DOESN'T THE DOCUMENT OPEN IN MY BROWSER?

If your document does not download or open, it may be because of a security setting in your web browser. Please check your settings and try again. If you are still experiencing difficulties in opening or downloading your document, please contact Lexis Customer Support at **1-800-387-0899**.

WHY CAN'T I DOWNLOAD THE DOCUMENT INTO WORD?

This might be because you are using an older version of Microsoft Word. Lexis Smart Forms supports Microsoft Word 2014 and above. You may need to install the Microsoft compatibility pack for Word available from the Microsoft website.

HOW DO I KNOW MY DOCUMENT COMPLIES WITH CURRENT LAW?

Lexis Smart Forms are reviewed and maintained by the Lexis Practice Advisor Lawyer Team to ensure they contain the right information and are up to date.

CAN I GO BACK AND CHANGE ANSWERS I HAVE ALREADY GIVEN?

Yes. If you are currently in the questionnaire, use the ‘Back’ button to revisit and change your answer to previous questions or use the Topic Progress pane to jump to different topics within the questionnaire.

In the document preview at the end of the questionnaire, change answers by clicking on active text (in blue brackets) or the data in the Interview Summary to be taken back to the relevant question.

To change answers you have already downloaded as an answer file to your local drive, upload the answer file by clicking on “Import saved answers” on the first page of the questionnaire and then navigate through the questionnaire to the answers you want to change.

WHAT IS THE SKIP BUTTON?

You do not have to complete every question in a questionnaire before you can generate documents. However, some questions are mandatory (marked with a red asterisk) because the answers to those questions have a significant impact on the structure of the documents. The Skip button allows you to skip to the document preview and will prompt you to answer any remaining mandatory questions before generating the preview.

IS MY DATA SECURE?

Yes. Data entered into Lexis Smart Forms questionnaires are encrypted. Note that answers are not saved on our servers after the user closes out of a Smart Form. To save your answers, please see “Can I save the answers I gave to a Lexis Smart Forms questionnaire?”

WHERE CAN I GET MORE INFORMATION ABOUT LEXIS SMART FORMS?

For more information about Lexis Smart Forms, please see the User Guide.