Your Legacy EP – Internal FAQ (Intake Module)

What if the client skips non-required fields?

Non-required fields may be left blank, but staff should review the intake before the consult and note any gaps that could affect planning. Encourage completion where possible during the meeting.

How do we handle expired IDs?

If an ID is expired or missing, flag this in your internal notes and help the client obtain a valid ID before any document signing appointments are scheduled.

How do we correct an entry after submission?

Use your internal workflow to reopen or edit the intake record, or add a clear note for the attorney describing what needs to be corrected so it is handled before drafting.

How do we see uploaded documents?

Uploaded documents are available in the client's record in the system. Staff should verify that all expected documents are present and legible before the consult.

How does intake data flow into drafting?

Intake fields are mapped to data fields in your drafting system or document templates. Accurate entries reduce manual editing and drafting errors.

What should staff flag for the attorney before the consult?

Flag complex family structures, blended families, disabled beneficiaries, government benefits, high-value or unusual assets, disinheritance requests, and any urgent questions raised by the client.

How do we handle clients with limited technology skills?

Offer to complete intake over the phone or in-office with staff assistance. Document who provided the information and confirm accuracy during the consult.