

# The LPA Combined Workflow

## Improved Efficiency and Risk Management



Integrates to most case management systems



Fast & efficient navigation between sections



Internal help pages for all functions

## Intelligent LPA & CoP Workflow Solutions

### LPA Combined Workflow

Allows the LPA to be completed efficiently with minimal risk and is suitable for matters where there are up to 4 attorneys and up to 5 people to be told

#### Workflow section

Navigate to the Workflow section to edit and complete the details for:

- Donor,
- Attorney,
- People to be told
- Replacement Attorneys
- Additional

Once the relevant details have been entered in the Workflow section, you can complete the appropriate LPA by clicking on the tab provided for Property and Financial Affairs, LP1F, or Health and Welfare, LP1H.

Data entered into the Workflow will now flow into the relevant sections. Similarly for the LP3 (PA) and LP3(HW)

### The CoP Workflow

We also offer a CoP Workflow that will save you hours of time by eliminating the tedious process of typing repetitive case details into forms.

Simply tab through to fill in the relevant case details on the front page once. When required details have been entered, move to the bottom of the page and select the forms you wish to complete.