

# Using LawHelp Interactive (LHI) to Assemble LLC Formation Documents

## 1. Access the LLC Formation Templates

LLC formation template links can be found:

<http://www.law.byu.edu/site/llctemplates/>

Each entry on the LLC Formation Templates portion of the page (see A in the illustration below) is a separate link to an LLC formation template located on the LHI server.

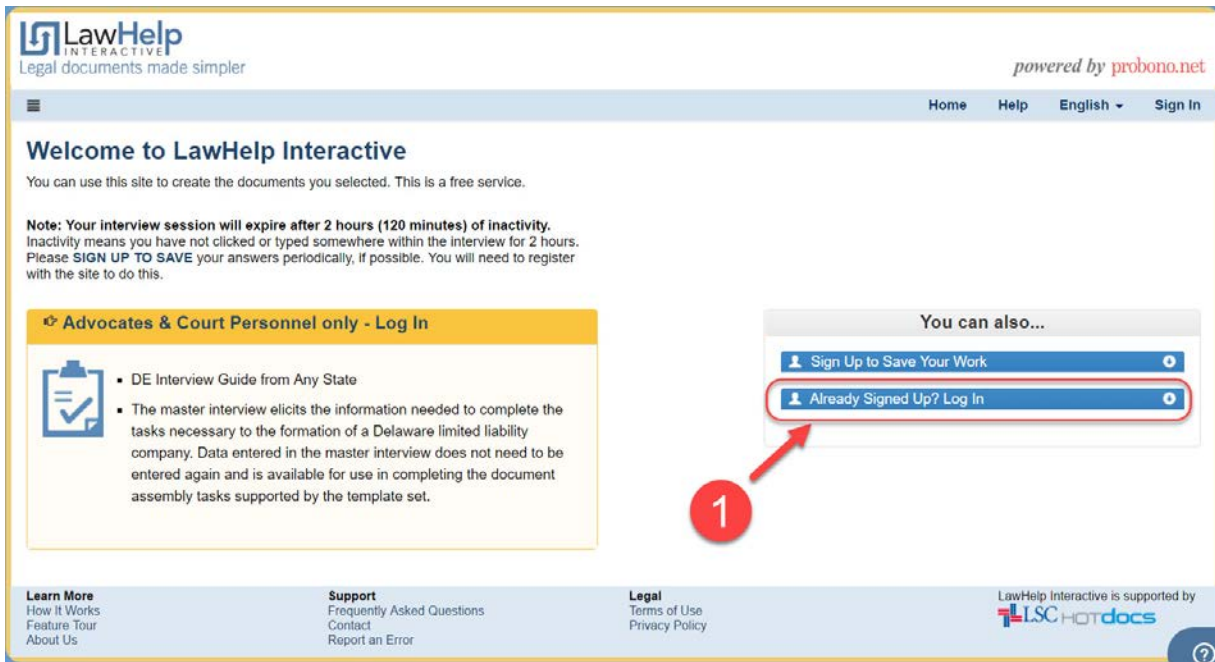
## LLC Formation Tools

LLC Formation Templates	Participant Resources
<p><b>Master Interview &amp; Interview Guide</b> Interview Guide Master Interview Interview Summary</p>	<p><b>Getting Started</b> Quick Start Guide Setting Up an LHI Account Using LHI to Assemble LLC Documents Interviews, Guides &amp; Summaries Document Templates Resources</p>
<p><b>Reservation of Business Name</b> Name Reservation Filing Checklist Name Reservation Transmittal Letter</p>	<p><b>Practice Guides</b> Gathering and Managing Client Data Managing the LLC Formation Process Working with Your Supervisor Using Operational Guidelines</p>
<p><b>Articles/Certificate</b> Articles/Certificate Filing Checklist Articles/Certificate of Formation Statement/Certificate of Conversion (DE, PA &amp; UT) Plan of Conversion Transmittal Letter for Filing Articles/Certificate</p>	<p><b>User Feedback</b> User Comments &amp; Suggestions</p>
<p><b>Operating Agreement/LLC Agreement</b> Operating Agreement/LLC Agreement Agreement Transmittal Letter</p>	<p><b>Clinic Surveys</b> Beginning of Term Survey ** End of Term Survey **</p>
<p><b>Operational Guidelines</b> Operational Guidelines Guidelines Transmittal Letter</p>	
<p><b>Miscellaneous Templates</b> Statement of Authority (DE, UT only) Notice of Meeting Consent of Members Consent of Managers Unanimous Consent of Members Unanimous Consent of Managers Assignment of Membership Interest</p>	
<p><b>FEIN Forms</b> Filing Checklist for FEIN Form Transmittal Letter for FEIN Form Transmittal FAX for FEIN Form</p>	
<p><b>Conflicts Waiver</b> Conflicts Waiver Letter</p>	

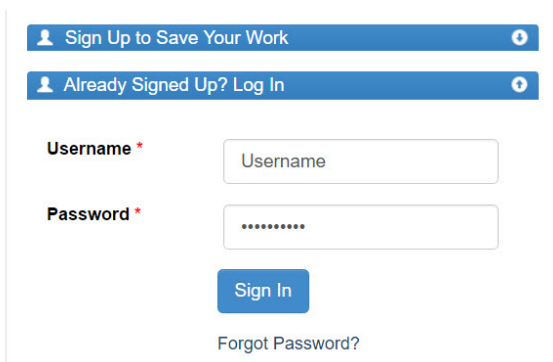
## 2. “Log In” to the LawHelp (LHI) Server

Each link on the LLC Templates page (shown above) will take you to specific LLC template on the LHI server. For example, if you click on “Interview Guide,” you will be taken to the initial page on the LHI server that allows you to start the process of preparing a document, in this case an Interview Guide (shown below). Creating an Interview Guide based on what you initially know about the client is a great first step to assist with the interview process.

If you’ve already created an account (if not, see instruction Setting Up an LHI Account in Participant Resources), click on the Log In option (see “1” below) to log in with your LHI username and password to “run” the selected template.



The screenshot shows the LawHelp Interactive website interface. At the top, there is a navigation bar with 'Home', 'Help', 'English', and 'Sign In' links. The main content area features a 'Welcome to LawHelp Interactive' message and a 'Note: Your interview session will expire after 2 hours (120 minutes) of inactivity.' Below this, there is a section titled 'Advocates & Court Personnel only - Log In' with a list of bullet points. To the right, a 'You can also...' box contains two options: 'Sign Up to Save Your Work' and 'Already Signed Up? Log In'. A red circle with the number '1' and an arrow points to the 'Already Signed Up? Log In' option.



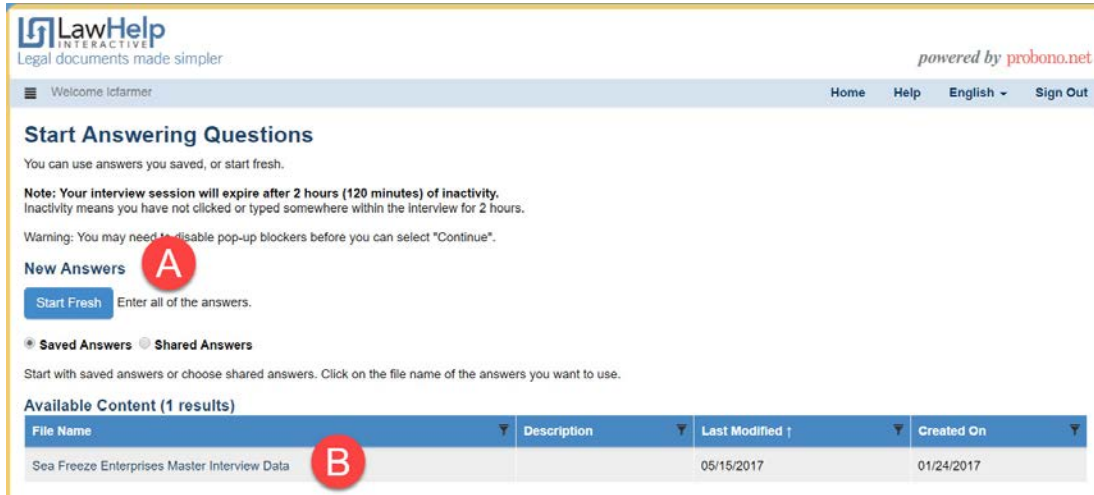
The login form consists of two input fields: 'Username \*' and 'Password \*'. The 'Username' field contains the text 'Username' and the 'Password' field contains a series of dots. Below the fields is a blue 'Sign In' button and a link for 'Forgot Password?'.

Enter your **Username** and **Password**.

### 3. Create or Select an Answer File.

Your first task when running a template is to either create a new “answer” file or select an existing answer file. To get started with an answer file, do one of the following:

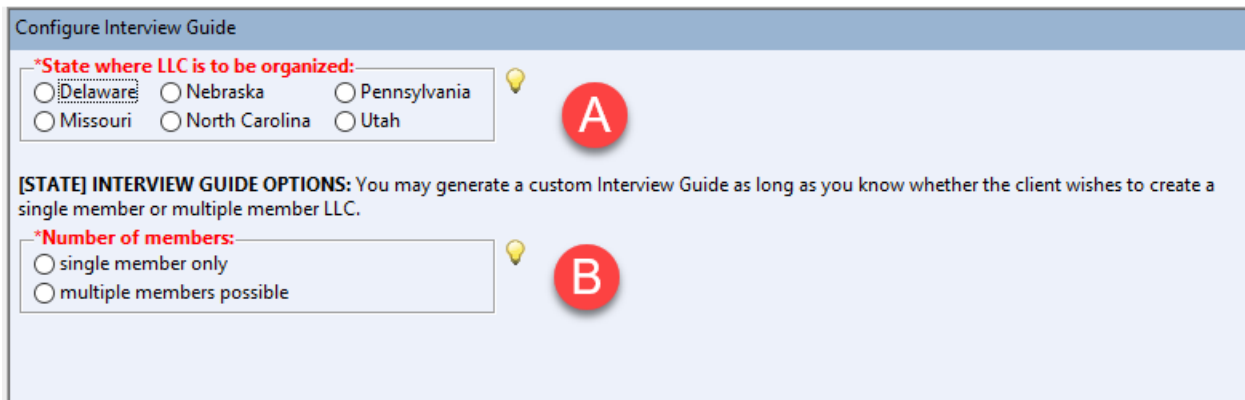
- a. On your first entry or whenever you are starting with a new client, select “**Start Fresh**” (see A below)
- b. If you’ve previously entered data (answers) collected from a client, you may load a pre-existing file by selecting the appropriate file from the “**Available Content**” list (see B below). Note that thoughtful file naming can make this process easier.



### 4. Entering Interview Data – Part 1

To generate an Interview Guide, enter the information you know about the client’s matter.

- a. **State selection (see A below; Answer Required).** Since the LLC Tools support LLC formation in many different states, the “State where LLC is to be organized:” is always asked as the first question in each interview. The question is displayed in red font to signal that the question must be answered to proceed through the interview.



- b. For this illustration, “Delaware” and “multiple members possible” are selected (see illustration below).

Configure Interview Guide

\*State where business to be formed:

Delaware  Nebraska  Pennsylvania  
 Missouri  North Carolina  Utah

DELAWARE INTERVIEW GUIDE OPTIONS: You may generate a custom Interview Guide as long as you know whether the client wishes to create a single member or multiple member LLC.

\*Number of members:

single member only  multiple members possible

## Entering Interview Data – Part 2

Notice that additional questions become available on the same display after you indicate whether the LLC will have a “single” member or “multiple members.” If you are uncertain as to how to answer one of the questions, select “unknown” (see “1” below) which will cause a full range of options related to that item to be included in the Guide. After responding to all the questions, click *Next* (to move to the next question) or *Finish* (to close the interview and assemble the document) (see “2” below).

DELAWARE CUSTOMIZATION OPTIONS: You may further focus content of the Interview Guide by specifying what you already know about the nature of the business, its origin and management. If you are uncertain on any of these issues, select “unknown” in order to retain the full range of options in the Guide.

\*Nature of the business:

commercial enterprise  
 professional services  
 unknown

\*Company origin:

formation of new LLC  
 conversion of existing partnership to new LLC  
 unknown

\*Management:

member management  
 representative management  
 unknown

Navigation: First Previous Next Last Finish

## 5. Getting Substantive Help

Click on a lightbulb icon (see “1” below) to see a question specific help or the lightbulb icon in the upper right corner for a general help (see “2” below). These helps illuminate the law and legal considerations associated with the various questions.

**CUSTOMIZATION OPTIONS:** You may further focus content of the Interview Guide by specifying what you already know about the nature of the business, its origin and management. If you are uncertain on any of these issues, select "unknown" in order retain the full range of options in the Guide.

**Nature of the business:**

- commercial enterprise
- professional services
- unknown

**Company origin:**

- formation of new LLC
- conversion of existing partnership to new LLC
- unknown

**Management:**

- member management
- representative management
- unknown

**Resource**

**PROFESSIONAL OR COMMERCIAL PURPOSE:** Caution - While the system generally accommodates the formation of a professional limited liability company, it does not account for all of the options and constraints imposed by statutes and regulations specific to particular professions and the business forms in which they may be conducted. Accordingly, before proceeding, carefully review all other statutes and regulations pertaining to the particular profession, in order to confirm that the information, choices and documentation supplied by the LLC template set fully comply with the requirements of those statutes and regulations.

The screenshot shows a form with three sections: 'Nature of the business', 'Company origin', and 'Management'. Each section has radio button options. A red circle with the number '1' highlights a lightbulb icon next to the 'commercial enterprise' option. Another red circle with the number '2' highlights a lightbulb icon in the top right corner of the interface, next to a 'Resource' tab.

## 6. Get Your Document

Once you’ve answer all the interview questions and clicked on “Finish” you will see the “Done Answering Questions” page below from which you can (a) save the answers you’ve provide to the interview questions for later access (highly recommended; see “1” below) (b) go back to questions or (c) get access your document (in this case a **Delaware Interview Guide**). Your document access options (see 2 below) are to either download the document to your computer or have the document emailed to you.

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### Done answering questions?

Now review your document, save your answers, or go back to the questions.  
**Note:** LawHelp Interactive does not file your form for you. You must print and file it yourself.

**Important!**  
When you are done, close **all** of your browser’s windows. If you do not, other people may see what forms you filled out. Make sure to get or e-mail your document before you close your browser.

**Save Your Answers**

**File Name \***  
lcfarmer’s Answers (created 05/15/2017)

Name your answers.

**Description**

**You can also...**

- Go Back To Questions
- Get Your Document
- Email Your Document

The screenshot shows the 'Done answering questions?' page. It has a header with the LawHelp logo and navigation links. The main content area contains instructions and a 'Save Your Answers' section with a form for file name and description. A red circle with the number '1' highlights the 'Save Your Answers' button. To the right, there is a 'You can also...' section with three buttons: 'Go Back To Questions', 'Get Your Document', and 'Email Your Document'. A red circle with the number '2' highlights the 'Get Your Document' button.