



Center for Disability & Elder Law

Step-By-Step Instructions for CDEL's Automated Suite of Documents for Wills and TODs on Contract Express

The link to the questionnaire is: <https://na1.contractexpress.com/app/public/40742>.

General Tips

- Navigate using the arrows on bottom right of screen
- Save and close pages when completed – on top right and bottom left of screen
 - There will be a green arrow on the menu to the left when page is completed
- Use Preview to Open any document you have completed
- When you close the site, you cannot return to it
- ALL Documents are generated and provided to CDEL you do not need to download anything



Center for Disability & Elder Law

Step-By-Step Instructions for CDEL's Automated Suite of Documents for Powers of Attorney on Contract Express

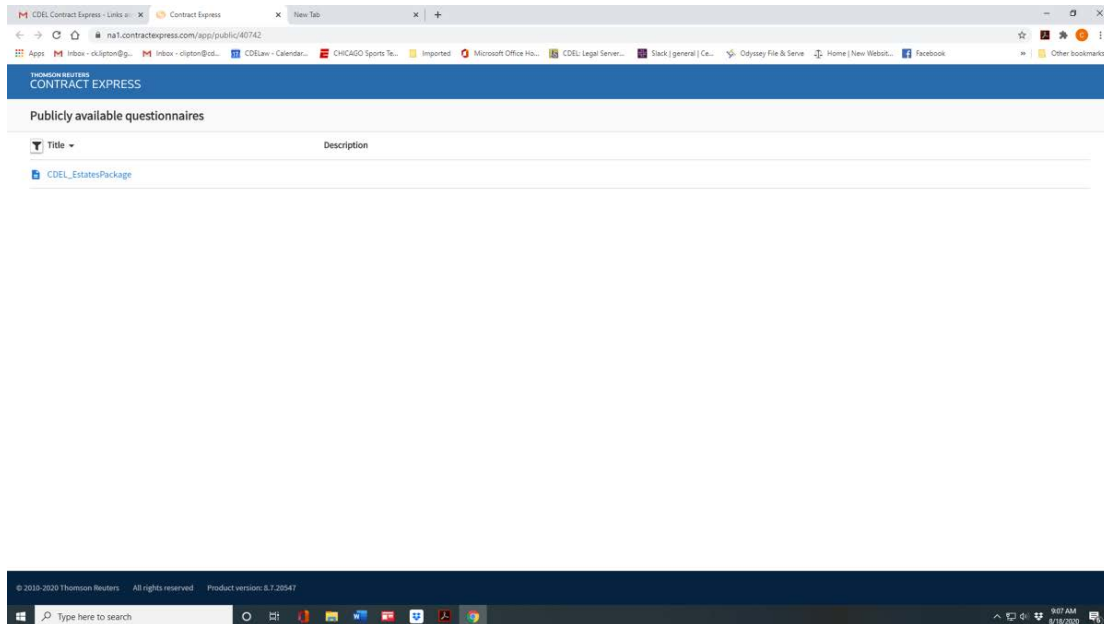
The link to the questionnaire is: <https://na1.contractexpress.com/app/public/40742>.

General Tips

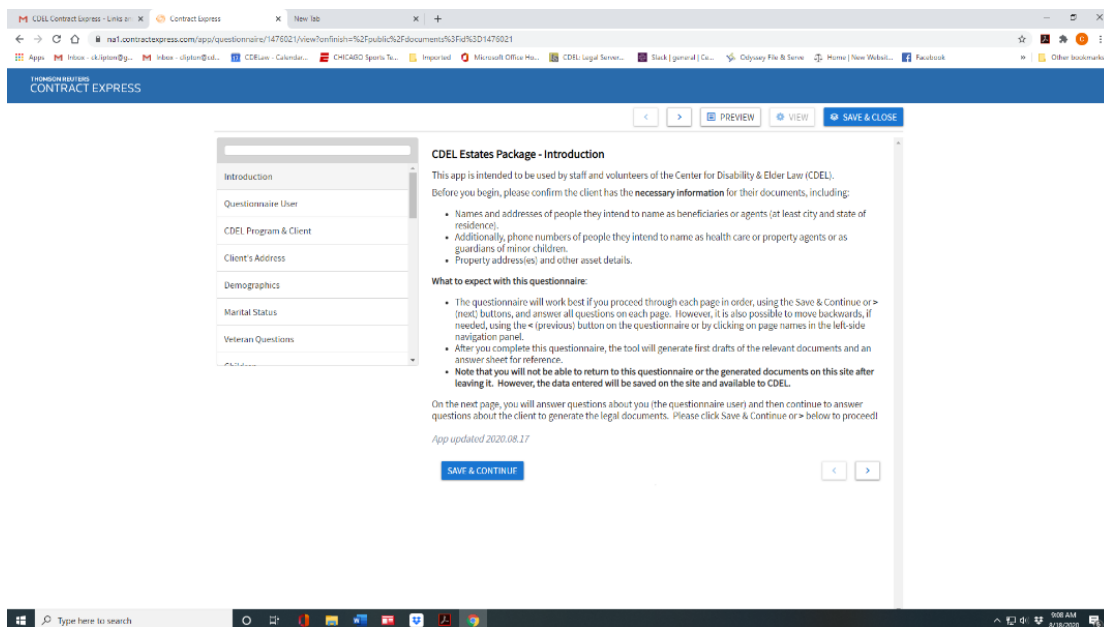
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- Use Preview to Open any document you have completed
- When you close the site, you cannot return to it
- ALL Documents are generated and provided to CDEL you do not need to download anything

The screenshot shows a web browser window displaying the 'CONTRACT EXPRESS' questionnaire. The interface includes a left-hand menu with sections like 'Introduction', 'Questionnaire User', 'CDEL Program & Client', 'Client's Address', 'Demographics', 'Marital Status', and 'Veteran Questions'. The 'Questionnaire User' section is currently active, showing fields for 'First name', 'Last name', 'Role with CDEL' (a dropdown menu), and 'Email address'. Below these fields is a checkbox for 'Is this questionnaire use for testing purposes only?'. At the bottom of the form is a 'SAVE & CONTINUE' button. Navigation arrows (back and forward) are located at the bottom right of the form area. A yellow arrow points to the 'PREVIEW' button at the top right of the form. Another yellow arrow points to the 'SAVE & CLOSE' button at the top right of the browser window. A third yellow arrow points to the 'SAVE & CONTINUE' button at the bottom of the form. A fourth yellow arrow points to the back and forward navigation arrows at the bottom right of the form.

CDEL Estates Package



Introduction



Questionnaire User

- Enter your name
- You are a volunteer attorney
- Enter your email
- Select whether it is a test – if you are testing out and it is not a real client this should say “Yes – this is a test”

The screenshot shows a web browser window with the URL nat1.contractexpress.com/app/questionnaire/1476021/new?onfinish=%2Fpublic%2Fdocuments%2F3D1476021. The page title is "THOMSON REUTERS CONTRACT EXPRESS". The form is titled "Questionnaire User" and includes a sidebar with a list of steps: Introduction (checked), Questionnaire User (active), CDEL Program & Client, Client's Address, Demographics, Marital Status, Veteran Questions, and Children. The main form area contains the following fields and instructions:

- First name: *
- Last name: *
- Role with CDEL: * (dropdown menu showing "-- Select --")
- Email address: *
- Is this questionnaire use for testing purposes only?
☐ No
If so, click to select Yes to help filter your test answers out of regular reporting. For regular uses, leave unchecked.

At the bottom of the form are buttons for "SAVE & CONTINUE", "PREVIEW", "VIEW", and "SAVE & CLOSE".

CDEL Program & Client

- Select appropriate program
 - Power of Attorney (POA for Property, Health Care and Living Will)
 - Housing Preservation (TODI workshop)
 - Estate Planning (Wills and TODIs)
- Enter client's name

CDEL Limited Client Agreement Acceptance

- Make sure to read the LCA out loud and make sure they understand the scope of the representation
- Use the **Preview** button at the top of the screen to see the LCA
- Will inquire if you are willing to use an electronic signature
- Select yes to advance to next screen

Demographics and Veteran Information for CDEL

- Demographic and veteran information was collected before the appointments

Client's Address

- Will show up on documents exactly as you type it so please type accordingly and use proper spacing and punctuation

Client's Marital Status

The screenshot shows a web browser window with the URL `na1.contractexpress.com/app/questionnaire/1476021/view?onfinish=%2Fpublic%2Fdocuments%3Fid%3D1476021`. The page header includes the text "THOMSON REUTERS CONTRACT EXPRESS". The left sidebar contains a list of questionnaire steps: Introduction, Questionnaire User, CDEI Program & Client, Client's Address, Marital Status (highlighted), Health Care Power of Attorney, and Health POA - Health Decisions. The main content area displays the "Marital Status" section with a note: "Note: 'you' and 'your' on the rest of this questionnaire refer to the Client." Below the note, the "Marital status:" label is followed by four radio button options:
☐ married
☐ single
☐ widowed
☐ divorced
 At the bottom of the form is a blue "SAVE & CONTINUE" button. Navigation buttons for back, forward, preview, view, and save & close are located at the top right of the form area.

Health Care Power of Attorney

- Is there a prior POA?
- Select yes to advance to the questionnaire

The screenshot shows the same web browser window, but the questionnaire has advanced to the "Health Care Power of Attorney" step. The left sidebar now highlights "Health Care Power of Attorney" and lists subsequent steps: Health POA - Health Decisions, Burial Arrangements, Property Power of Attorney, Property POA - Agent Powers, Property POA - Options, and Notes for CDEI. The main content area displays the "Health Care Power of Attorney" section with the question: "Do you already have a current Power of Attorney for Health Care?*" followed by three radio button options:
☐ Yes
☐ No
☐ Not sure
 Below this is another question: "Would you like CDEI to assist you in drafting a Power of Attorney for Health Care now?*" with two radio button options:
☐ Yes
☐ No
 A blue "SAVE & CONTINUE" button is positioned at the bottom of the form. The navigation buttons at the top right remain the same.

Health Care Power of Attorney: Health Care Agent – First Choice

- Agent's full name
- Agent's address and phone number – will appear on document exactly as you type it

Successor Health Care Agent

- Use whatever information is available that day so if not ready to name a successor then select no and continue with the questionnaire

The screenshot displays a web browser window with the URL na1.contractexpress.com/app/questionnaire/1476021/view?onfinish=%2Fpublic%2Fdocuments%3Fid%3D1476021. The page title is "TUTORIALS EXPRESS CONTRACT EXPRESS". The form is titled "Health Care Power of Attorney: Health Care Agent - First Choice" and asks "Who do you want to name as an agent for making health care decisions for you if you are incapable?".

The form includes a sidebar with a list of sections: Marital Status, Health Care Power of Attorney (selected), Health POA - Health Decisions, Burial Arrangements, Property Power of Attorney, Property POA - Agent Powers, Property POA - Options, and Notes for CDEL.

The main content area contains the following fields and instructions:

- Agent's full name:** A dropdown menu with the option "-- Select or Enter Other --".
- Relationship:** A dropdown menu with the option "Select...".
- Address (please at least include City, State):** A text input field.
- Phone number:** A text input field.

Below the fields, a note states: "Please ensure the Relationship, Address, and Phone are correct below. If selecting a name from the list, note that default answers will only update the first time you visit this page." Another note at the bottom states: "Note we strongly encourage providing the agent's phone number here, as the individual may need to be contacted quickly when the Power of Attorney is activated."

The form also includes a section for "Successor Health Care Agent #1" with the question: "Are you naming a successor health care agent (to act if the agent selected above is unable or does not want to make health care decisions for you)?". The options are "Yes" and "No", with a note that "Yes is recommended."

At the bottom of the form, there are buttons for "PREVIEW", "VIEW", "SAVE & CLOSE", and "SAVE & CONTINUE".

Health Care Power of Attorney – Health Care Decisions

- Whether agent should be guardian of the person if one is needed
- When POA becomes active
- End of Life Care

CDel Contract Express - Link in... Contract Express New Tab

na1.contractexpress.com/app/questionnaire/1476021/new?onfinish=%2Fpublic%2Fdocuments%2F1476021

Apps Inbox - cklightn@... Inbox - cklightn@... CDelLaw - Calendar... CHICAGO Sports Te... Imported Microsoft Office Ho... CDel Legal Server... Slack | general | Ce... Odyssey File & Serve Home | New Webst... Facebook Other bookmarks

THOMSON REUTERS CONTRACT EXPRESS

PREVIEW VIEW SAVE & CLOSE

Marital Status ☒

Health Care Power of Attorney ☒

Health POA - Health Decisions

Burial Arrangements

Property Power of Attorney

Property POA - Agent Powers

Property POA - Options

Notes for CDel

Health Care Power of Attorney - Health Care Decisions

If you need a court appointed guardian, do you want the Health Agent you've named to act as your guardian? *

☐ Yes
☐ No

There are 3 choices for when the health care power of attorney becomes active. Which is your preference: *

☐ (a) Only when a doctor has decided that you cannot make decisions for yourself
☐ (b) Only when a doctor has decided that you cannot make decisions for yourself, but your agent can have access to your medical records and information starting now
☐ (c) Starting now, though you will have your choice about any treatment so long as you can communicate your choice

Please select which statement is more in line with your wishes when it comes to end of life care: *

☐ (1) The quality of my life is more important than the length of my life (Your agent may remove you from life support once it is unlikely you will be conscious again)
☐ (2) Staying alive is most important to me (Your agent may not remove you from life support)

Language in the POA for these options:

(1) The quality of my life is more important than the length of my life. If I am unconscious and my attending physician believes, in accordance with reasonable medical standards, that I will not wake up or recover my ability to think, communicate, and experience my surroundings, I do not want treatments to prolong my life or delay my death, but I do want treatment or care to make me comfortable and to relieve me of pain.

• Note, if this option is selected, a Living Will Declaration will also be generated.

(2) Staying alive is more important to me, no matter how sick I am, how much I am suffering, the cost of the procedures, or how unlikely my chances for recovery are. I want my life to be prolonged to the greatest extent possible in accordance with reasonable medical standards.

Are there any limits you want to place on your health care agent (for example, certain procedures like autopsy, organ donation, burial)?

☐ Yes
☐ No

SAVE & CONTINUE

Type here to search 9:14 AM 8/18/2020

Burial Arrangements

- Burial or cremation and any prepaid plans
- Organ donation or autopsy selection

Power of Attorney for Property

- Is there a prior POA?
- Read the Notice in full and get verbal okay – use Preview button to view

The screenshot displays the Thomson Reuters Contract Express web application. The browser window shows the URL: na1.contractexpress.com/app/questionnaire/1476021/view?onfinish=%2Fpublic%2Fdocuments%3Fid%3D1476021. The application interface includes a sidebar with a list of steps: CDEL Program & Client, Client's Address, Marital Status, Health Care Power of Attorney, Health POA - Health Decisions, Burial Arrangements, and Property Power of Attorney (which is currently selected). The main content area is titled 'Property Power of Attorney' and contains the following sections:

- Property Power of Attorney**
Do you already have a current Power of Attorney for Property? *
☐ Yes
☒ No
☐ Not sure
- Would you like CDEL to assist you in drafting a Power of Attorney for Property now? *
☒ Yes
☐ No
- Property Power of Attorney: Property Agent - First Choice**
Who do you name as agent for making property or business-type decisions for you?
Agent's full name: *
-- Select or Enter Other --
-- Select or Enter Other --
Jim Smith
Other
- Relationship: *
Select...
- Address (please at least include City, State):

Phone number:

The bottom of the screen shows a Windows taskbar with the time 9:16 AM on 8/18/2020.

Power of Attorney for Property: Agent First Choice

- Follow guide for Health Care
- Dropdown menu will have all prior agents and their relationships and address and phone numbers

Property Agent – Successor Agents

Property Power of Attorney – Agent's Powers

- Intended to be broad unless client directs otherwise
- ONLY check ones client does not want

Property Power of Attorney Options

- Delegation of discretionary powers
- Agent compensation
- Extra Powers

The screenshot shows a web browser window with the URL na1.contractexpress.com/app/questionnaire/1476021/view?onfinish=%2Fpublic%2Fdocuments%3Fid%3D1476021. The page title is "THOMSON REUTERS CONTRACT EXPRESS". The interface includes a sidebar with a list of sections: Health POA - Health Decisions, Burial Arrangements, Property Power of Attorney, Property POA - Agent Powers, Property POA - Options, Notes for CDEL, and Final Page. The main content area displays the "Property POA - Agent Powers" section. It contains guidance for the client, a "Power Limits" question with radio button options (Yes/No), and an "Extra Powers" section with checkboxes for allowing the agent to make gifts and access digital assets. Navigation buttons at the top right include "PREVIEW", "VIEW", and "SAVE & CLOSE". At the bottom of the main content area is a "SAVE & CONTINUE" button. The Windows taskbar at the bottom shows the time as 9:11 AM on 8/19/2020.

Only check the items the client does NOT wish to grant their agent.

Guidance for client: The person named will have broad powers to handle financial and property affairs. Just because you don't have something listed does not mean that you should strike it because what you have today might not be what you have next year. You could inherit property or win the lottery. With that being said, we can strike any item you would NOT want your agent to be able to handle.

Power Limits Does the client want to place any limits on the property agent's powers? *

☐ Yes

☒ No

For example, prohibit sale of certain assets or access to a certain account?

Extra Powers Note, while the default Property Power of Attorney is very broad, there are a few powers that are not included by default. These include the ability to make gifts and change beneficiaries on accounts like life insurance policies or bank accounts.

Here you can also allow your agent to access your digital assets like social media and other online accounts.

Would you like to add any of these powers? *

☒ Yes

☐ No

Select the extra powers you would like to grant your property agent:

☐ Allow the agent to make gifts (including to the agent; and add, change or update any beneficiary designation (such as on life insurance, retirement accounts, etc.).

☒ Allow the agent to access my digital assets (social media accounts, online accounts, etc.)

☐ Other

Guidance for client: Here you may add any other delegable powers including, without limitation, power to make gifts, exercise powers of appointment, name or change beneficiaries or joint tenants or revoke or amend any trust specifically referenced.

SAVE & CONTINUE

Notes for CDEL

Questionnaire Feedback

THOMSON REUTERS
CONTRACT EXPRESS

< > PREVIEW VIEW SAVE & CLOSE

Notes and feedback on this page will be included on the generated Answers file.

Notes for CDEL Files

Preparer: Please enter any other notes relevant for CDEL's files

Questionnaire Feedback

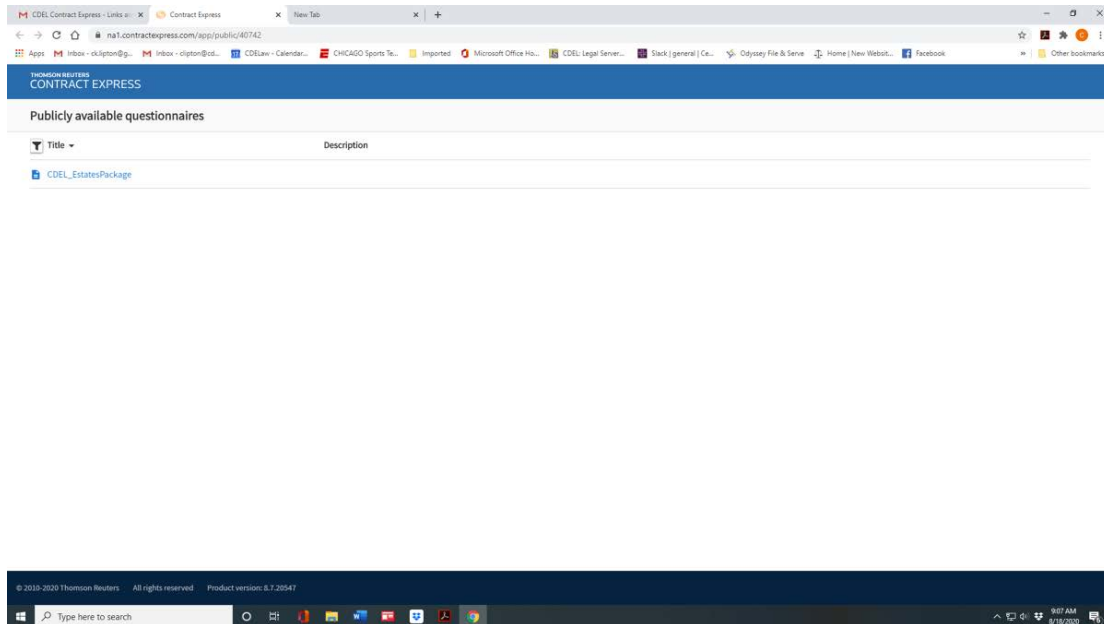
Help us improve this questionnaire! Please provide any feedback you would like to share, including whether there were areas that you found confusing or areas that would benefit from additional guidance.

SAVE & CONTINUE < >

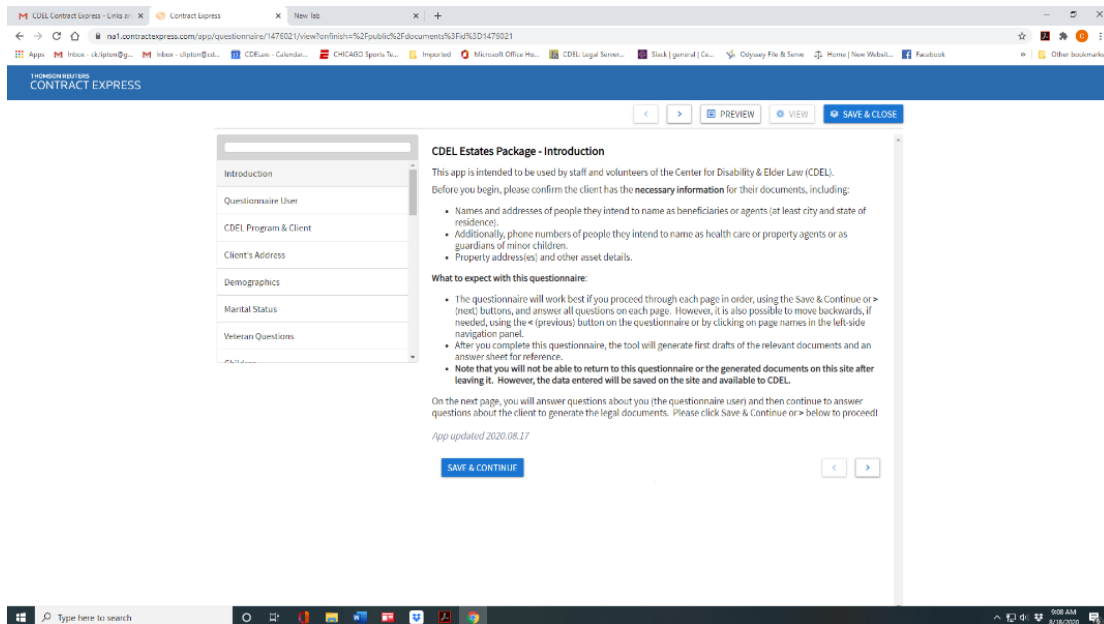
Final Page

- Save and close when questionnaire completed

For Power of Attorney Documents



Introduction



Questionnaire User

- Enter your name
- You are a volunteer attorney
- Enter your email
- Select whether it is a test – if you are testing out and it is not a real client this should say “Yes – this is a test”

The screenshot shows a web browser window with the 'Contract Express' application. The page title is 'THOMSON REUTERS CONTRACT EXPRESS'. The main content area is titled 'Questionnaire User' and contains the following fields and instructions:

- Introduction** (checked with a green checkmark)
- Questionnaire User** (selected in the left sidebar)
- CDEL Program & Client**
- Client's Address**
- Demographics**
- Marital Status**
- Veteran Questions**
- Children**

Questionnaire User

Please enter your name, role, and email so we know who is completing this questionnaire for the client.

First name: *

Last name: *

Role with CDEL: *

[- Select -]

Email address: *

Is this questionnaire use for testing purposes only?

☐ No

If so, click to select Yes to help filter your test answers out of regular reporting. For regular uses, leave unchecked.

SAVE & CONTINUE

CDEL Program & Client

- Select appropriate program
 - Power of Attorney (POA for Property, Health Care and Living Will)
 - Housing Preservation (TODI workshop)
 - Estate Planning (Wills and TODIs)
- Enter client's name

The screenshot shows the CDEL Contract Express web application interface. The browser address bar displays the URL: na1.contractexpress.com/app/questionnaire/1476021/view?onfinish=%2Fpublic%2Fdocuments%3Fid%3D1476021. The application header includes the text "THOMSON REUTERS CONTRACT EXPRESS".

The main content area is titled "CDEL Program" and contains the following sections:

- Please select the client's applicable CDEL Program: ***
 - ☐ Power of Attorney Suite
 - ☐ Housing Preservation Project (HPP)
 - ☒ Estate Planning Suite
- Client**
 - Client's first and middle names *
 - Client's last name (surname) *
 - Need to collect client's income and demographic data for CDEL?
 - ☒ Yes
 - ☐ No, already collected
 - Select "No" only if CDEL has already collected all the client's demographic and household income data.
 - Is the client a veteran or the spouse of a veteran (of the United States military)? *
 - ☐ Yes
 - ☐ No
- Counsel**
 - Have you (the client) spoken to any other attorneys about this matter?
 - ☐ Yes
 - ☐ No

Navigation buttons at the top right include "<", ">", "PREVIEW", "VIEW", and "SAVE & CLOSE". A "SAVE & CONTINUE" button is located at the bottom left of the form area. A yellow arrow points to the "Estate Planning Suite" radio button.

CDEL Limited Client Agreement Acceptance

- Make sure to read the LCA out loud and make sure they understand the scope of the representation
- Use the **Preview** button at the top of the screen to see the LCA
- Will inquire if you are willing to use an electronic signature

The screenshot shows a web browser window with the URL na1.contractexpress.com/app/questionnaire/1509550/view?onfinish=%2Fpublic%2Fdocuments%3Fid%3D1509550. The page title is "THOMSON REUTERS CONTRACT EXPRESS". The form is titled "CDEL Limited Client Agreement Acceptance". It includes a sidebar with a table of contents: Introduction (checked), Questionnaire User (checked), CDEL Program & Client (checked), CDEL Limited Client Agreement (selected), Other Counsel, Demographics Information, and Demographics Details. The main content area contains the following text: "If you have not done so already, please review the CDEL Limited Client Agreement document with the client to gain the client's verbal acceptance to the Agreement." followed by a link: "<< To preview the agreement text, click here to EXPAND the text preview. >>". Below this is a question: "Has the client given verbal agreement to CDEL's Limited Client Agreement?" with radio buttons for "Yes" (selected) and "No". A note states: "If the client does not accept, you may close this questionnaire without proceeding further." The next section is "CDEL Volunteer Attorney - Electronic Signature" with a question: "Jay Kay: Would you like this system to add your /s/ electronic signature to the Limited Client Agreement? (/s/ Jay Kay)" with radio buttons for "Yes" (selected) and "No". A note states: "If you select No here, you will need to manually sign the Limited Client Agreement after the document is generated and send it to CDEL. CDEL will send the Limited Client Agreement to the client to sign, along with other documents." At the bottom of the form are buttons for "SAVE & CONTINUE", "PREVIEW", "VIEW", and "SAVE & CLOSE".

Other Counsel

- Yes/No
- If yes, provide contact information and whether retained

Demographics and Veteran Information for CDEL

- Demographic and veteran information was collected before the appointment

Client's Address

- Will show up on documents exactly as you type it so please type accordingly and use proper spacing and punctuation

Client's Marital Status

- Select marital status
- If married, answer if disinheriting spouse
 - If yes, explain spousal share
- Add requested information
- If you don't have date of divorce or death, add what you do have

The screenshot displays the CDEL Contract Express web application interface. The browser's address bar shows the URL: `na1.contractexpress.com/app/questionnaire/1476021/view?onfinish=%2Fpublic%2Fdocuments%3Fid%3D1476021`. The application header includes the text "TUTORIALS EXPRESS CONTRACT EXPRESS" and navigation buttons: "<", ">", "PREVIEW", "VIEW", and "SAVE & CLOSE".

On the left, a sidebar lists the questionnaire sections with progress indicators (green checkmarks):

- Introduction
- Questionnaire User
- CDEL Program & Client
- Client's Address
- Marital Status
- Health Care Power of Attorney
- Health POA - Health Decisions

The main content area is titled "Marital Status" and includes a note: "Note: 'you' and 'youi' on the rest of this questionnaire refer to the Client." Below the note, the "Marital status: *" field has four radio button options:

- ☐ married
- ☐ single
- ☐ widowed
- ☐ divorced

A "SAVE & CONTINUE" button is located below the options. Navigation buttons "<" and ">" are also present on the right side of the form.

Children

- List children (birth or adoption)
- Are they minors?
- Want to provide for future children?
- Any step-children?
- Fill in all needed details about children

The screenshot shows a web browser window with the URL na1.contractexpress.com/app/questionnaire/1509550/view?onfinish=%2Fpublic%2Fdocuments%3Fid%3D1509550. The page is titled "THOMSON REUTERS CONTRACT EXPRESS". On the left, a sidebar lists various sections: CDEL Program & Client, CDEL Limited Client Agreement, Other Counsel, Demographics Information, Client's Address, Marital Status, Children (selected), and Real Property. The main content area is titled "Children" and contains the following questions and options:

- Do you have children (by birth or adoption) that you want to provide for?
☒ Yes
☐ No
- Are any of your children under age 18 (minors)?
☐ Yes
☒ No
- Do you want to provide for future children?
☐ Yes
☒ No
- Do you have step-children (who you have not adopted) that you wish to treat the same as your children for purposes of sharing in your estate?
☐ Yes
☒ No

Below these questions is the "Children Details" section:

- How many children do you have (by birth or adoption)?
- Are you disinheriting any child?
☐ Yes
☒ No

At the bottom of the form, there is a "SAVE & CONTINUE" button and navigation arrows.

Household Information

Guardianship for Minor Children

- Wish to nominate a guardian for minor children?
- Wish to have sole or co-guardians?
- Provide requested information for guardians

Real Property

- Does client own real property?
- Own any other real property?

The screenshot displays the Thomson Reuters Contract Express web application. The browser's address bar shows the URL: `na1.contractexpress.com/app/questionnaire/1509550/view?onfinish=%2Fpublic%2Fdocuments%3Fid%3D1509550`. The application header includes the Thomson Reuters logo and the text "CONTRACT EXPRESS". A navigation menu on the left lists several sections: "Real Property", "Real Property Information", "TODI Beneficiaries Setup", "TODI Successor Beneficiaries", "Additional Assets", "Specific Gifts", and "Residual Estate". The "Real Property" section is currently active, showing the following questions and options:

Real Property

Do you own residential property (your home)?*

☒ Yes
☐ No

We strongly advise Illinois homeowners execute a **Transfer on Death Instrument (TODI)** to simplify title passage of their residential property.

If you do not execute a TODI, you can still specify who should receive the residential property in your will. You may select here if you want to opt out of generating a TODI.*

☒ Generate TODI
☐ Opt out of TODI

Do you own any other real property (that will not be transferred via a TODI)?

☐ Yes
☐ No

At the bottom of the form, there is a "SAVE & CONTINUE" button and navigation arrows. The Windows taskbar at the bottom of the screen shows the time as 9:49 AM on 10/26/2020.

Real Property Information

- Enter address, county, PIN, and title information

The screenshot shows the 'Contract Express' web application interface. The left sidebar contains a navigation menu with the following items: Real Property, Real Property Information, TODI Beneficiaries Setup, TODI Successor Beneficiaries, Additional Assets, Specific Gifts, and Residual Estate. The main content area is titled 'Residential Property Information for TODI' and contains the following fields and instructions:

- Property address: Street address***: A text input field.
- Include unit number, if applicable.**: A text input field.
- Property address: City, State (Illinois) and Zip***: A text input field.
- County where the property is located:**: A dropdown menu with 'Cook' selected.
- Property Identification Number ("PIN"). This should be in the format 12-12-123-1234**: A text input field.
- Property legal description:**: A text input field with the placeholder text 'See Attachment.'

Below the fields, there is a note: 'If you do not currently know the legal description, or if it is longer than a single paragraph or otherwise easier to include via an attachment, enter "See Attachment" here and add the legal description in a separate attachment later.'

At the bottom, there is a section titled 'Who is on the title for the residential property?' with two radio button options: 'You only' and 'You and other(s)'.

The screenshot shows the 'Contract Express' web application interface, specifically the 'Other Real Property Information' section. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Other Real Property Information' and contains the following fields and instructions:

- County where the property is located:**: A dropdown menu with 'Cook' selected.
- Property Identification Number ("PIN"). This should be in the format 12-12-123-1234**: A text input field.
- Property legal description:**: A text input field with the placeholder text 'See Attachment.'

Below the fields, there is a note: 'If you do not currently know the legal description, or if it is longer than a single paragraph or otherwise easier to include via an attachment, enter "See Attachment" here and add the legal description in a separate attachment later.'

At the bottom, there is a section titled 'Who is on the title for the residential property?' with two radio button options: 'You only' and 'You and other(s)'.

TODI Beneficiaries Setup

- List number of beneficiaries
- List beneficiaries' information
- How should title be held?

This screenshot shows the 'TODI Residential Property Beneficiaries' setup screen in the Contract Express application. The left sidebar contains a menu with options: Real Property, Real Property Information, TODI Beneficiaries Setup (highlighted), TODI Successor Beneficiaries, Additional Assets, Specific Gifts, and Residual Estate. The main content area is titled 'TODI Residential Property Beneficiaries' and includes a question: 'How many Beneficiaries of your residential property should be listed on the TODI?'. Below this is a text input field. A section titled 'Multiple Beneficiaries' asks 'How would you like the multiple Beneficiaries to hold title to the property?'. It provides two options: 'Joint Tenancy with right of survivorship (equal shares)' and 'Tenancy in common'. The 'Joint Tenancy' option is selected. Below this, there are radio buttons for 'joint tenants with right of survivorship (equal shares)' and 'tenants in common (equal or unequal shares)'. At the bottom of the main content area is a 'SAVE & CONTINUE' button. The top of the screen shows the Contract Express logo and navigation buttons: PREVIEW, VIEW, and SAVE & CLOSE.

This screenshot shows the 'TODI Beneficiaries' setup screen in the Contract Express application. The left sidebar contains a menu with options: Real Property, Real Property Information, TODI Beneficiaries Setup (highlighted), TODI Beneficiaries Details, TODI Successor Beneficiaries, Additional Assets, Specific Gifts, and Residual Estate. The main content area is titled 'TODI Beneficiaries' and includes a section for 'First Beneficiary'. It asks for the 'Beneficiary's full name' and provides a dropdown menu. Below this, it asks for the 'Relationship' and provides a dropdown menu. It also asks for the 'Address (at least City, State)' and provides a text input field. Finally, it asks for the 'Share' (percentage share) and provides a text input field. A note explains that for a half share, enter '50%', and for splitting evenly three ways, enter '33.33%' or 'third'. Below this, there is a section for 'Second Beneficiary' with similar fields for name, relationship, address, and share. The top of the screen shows the Contract Express logo and navigation buttons: PREVIEW, VIEW, and SAVE & CLOSE.

TODI Successor Beneficiaries

- Identify and provide details
- Use information available when you do the questionnaire

Additional Assets

- Provide information as requested for safe deposit box, bank accounts, life insurance, retirement accounts, vehicles, and stocks and bonds.

The screenshot shows a web browser window with the Thomson Reuters Contract Express application. The browser's address bar displays the URL: `na1.contractexpress.com/app/questionnaire/1509550/view?onfinish=%2Fpublic%2Fdocuments%3Fid%3D1509550`. The application interface includes a top navigation bar with the 'THOMSON REUTERS CONTRACT EXPRESS' logo and a set of navigation buttons: '<', '>', 'PREVIEW', 'VIEW', and 'SAVE & CLOSE'. On the left side, there is a sidebar menu with the following items: 'Real Property', 'Real Property Information', 'TODI Beneficiaries Setup', 'TODI Beneficiaries Details', 'TODI Successor Beneficiaries', 'Additional Assets' (which is currently selected), and 'Specific Gifts'. The main content area is titled 'Additional Assets' and contains the following text and questions:

If a particular asset is unknown/unsure, you may leave it blank.

Do you have a safe deposit box?

☐ Yes
☐ No

Do you have life insurance?

☐ Yes
☐ No

Do you have a retirement account?

☐ Yes
☐ No

Do you own a vehicle(s)?

☐ Yes
☐ No

Do you own stocks?

☐ Yes
☐ No

Do you own bonds?

☐ Yes
☐ No

Do you have a bank account(s)?

☐ Yes
☐ No

Do you have any other property not yet mentioned?

☐ Yes
☐ No

The Windows taskbar at the bottom of the screen shows the search bar with the text 'Type here to search' and the system clock indicating '11:01 AM 10/26/2020'.

Specific Gifts

- List any specific gift
- Get successor beneficiary where possible

The screenshot shows a web browser window with the URL `na1.contractexpress.com/app/questionnaire/1509550/view?onfinish=%2Fpublic%2Fdocuments%3Fid%3D1509550`. The application header includes the text "THOMSON REUTERS CONTRACT EXPRESS". On the left is a sidebar menu with items: Real Property, Real Property Information, TODI Beneficiaries Setup (checked), TODI Beneficiaries Details (checked), TODI Successor Beneficiaries (checked), Additional Assets, and Specific Gifts (selected). The main content area has a "Yes" radio button selected and a "No" radio button. Below this is a note: "Note, you may wish to specify recipients for assets such as your:". The "Specific Gifts" section follows, with instructions: "Below, list each specific gift and recipients (including relationship and address) in similar format to the examples below. Make sure to include any successor beneficiaries. For example:". Three example bullet points are provided: 1. "I give, devise, and bequeath the entirety of my CHASE SAVINGS ACCOUNT x5555 to go to John Smith, my brother, of Chicago, Illinois. If John Smith should predecease me, then to Samantha Smith, my niece, of Grand Rapids, Michigan." 2. "I give, devise, and bequeath all and any CATS AND DOGS I may have to my nephew, Jose Glee, if he survives me. If Jose Glee does not survive me, I give, devise, and bequeath all and any CATS AND DOGS I may have to my nephew, Keith Glee, of Madison, Wisconsin." 3. "I give, devise, and bequeath my CAR to WBEZ91.5 Chicago's NPR News Station (855-969-9589), if it is in existence at the time of my death. If WBEZ91.5 Chicago's NPR News Station is not in existence at the time of my death, I give, devise, and bequeath my CAR to NPR world headquarters in Washington, D.C." Below the examples, it says "You may reference the list of the client's assets above." and "To add additional gifts, use the + Add button at the right." There are "INSERT", "ADD", and "REMOVE" buttons. The "First Gift:" section instructs to "Enter gift(s) for a single beneficiary/group of joint beneficiaries per text box. Replace the [[placeholder]] text and edit with appropriate information:". A text box contains a placeholder: "I give, devise, and bequeath [[asset description]] to my [[beneficiary relationship]], [[beneficiary full name]], of [[beneficiary city, state of residence]]. If [[beneficiary name]] does not survive me, then to my [[successor beneficiary relationship]], [[successor beneficiary full name]], of [[successor beneficiary city, state of residence]].". At the bottom, it says "To add another gift, click '+ Add' at above right." The Windows taskbar at the bottom shows the search bar and various application icons, with the system clock displaying 10:01 AM on 10/26/2020.

Residual Estate

- Number of beneficiaries
- Provide information as requested

The screenshot shows the 'Residual Estate' step in the Contract Express questionnaire. On the left is a sidebar menu with options: Residual Estate (selected), Residual Estate Beneficiaries, Residual Estate Successor Beneficiaries, Liabilities of the Estate, Executors, Health Care Power of Attorney, and Health POA - Health Decisions. The main content area is titled 'Residual Estate' and contains the following text: 'The remaining portion of your estate (called your "residual estate") includes any and all property not specially named or gifted above.' followed by 'On the next page, you will list the names of individuals or charities that you would like to leave the rest of your property, also called your "residuary estate."' and 'How many beneficiaries of the residuary estate would you like to name?'. There is an empty text input field for the number of beneficiaries. At the bottom of the main content area is a 'SAVE & CONTINUE' button. Navigation buttons at the top right include '<', '>', 'PREVIEW', 'VIEW', and 'SAVE & CLOSE'. The browser's address bar shows the URL: na1.contractexpress.com/app/questionnaire/1509550/view?onfinish=%2Fpublic%2Fdocuments%3Fid%3D1509550.

The screenshot shows the 'Residual Estate Beneficiaries' step in the Contract Express questionnaire. The sidebar menu on the left is the same as in the previous screenshot, with 'Residual Estate Beneficiaries' now selected. The main content area is titled 'Residual Estate Beneficiaries' and contains the following sections: '1st Residual Estate Beneficiary' with a sub-header 'Beneficiary's full name:' and a dropdown menu showing '-- Select or Enter Other --'; a note 'Please ensure the Relationship and Address below are correct. If selecting a name from the list, note that default Relationship and Address answers will only update the first time you visit this page.'; a 'Relationship:' dropdown menu showing 'Select...'; a note 'If this beneficiary is an organization, choose "N/A".'; an 'Address (at least City, State):' text input field; and a 'Percent share of estate balance:' section with a text input field containing '33.33' and a '%' symbol. Below this is an example: 'For example, enter "50" for a half share. If splitting evenly three ways, enter "33.33".' and a red warning message: 'Please review to confirm that the beneficiaries' shares add up to 100 (%): 33.33333333'. At the bottom of the main content area is a 'SAVE & CONTINUE' button. Navigation buttons at the top right include '<', '>', 'PREVIEW', 'VIEW', and 'SAVE & CLOSE'. The browser's address bar shows the same URL as the previous screenshot.

Residual Estate Successor Beneficiaries

The screenshot shows a web browser window with the 'Contract Express' application. The left sidebar contains a list of sections: Residual Estate, Residual Estate Beneficiaries, Residual Estate Successor Beneficiaries, Liabilities of the Estate, Executors, Health Care Power of Attorney, and Health POA - Health Decisions. The 'Residual Estate Successor Beneficiaries' section is selected and highlighted in green. The main content area displays the title 'Residual Estate Successor Beneficiaries' and the question: 'Would you like to specify who the residual estate should pass to if the named beneficiary predeceases you?'. Below the question are two radio buttons: 'Yes' and 'No'. A note states: 'Yes is recommended. However, if you are not ready to name a successor today, then select No.' At the bottom of the form is a 'SAVE & CONTINUE' button. The top of the application window has navigation buttons: '<', '>', 'PREVIEW', 'VIEW', and 'SAVE & CLOSE'.

Liabilities of the Estate

The screenshot shows the 'Contract Express' application with the 'Liabilities of the Estate' section selected and highlighted in green in the left sidebar. The main content area displays the title 'Liabilities of the Estate' and the instruction: 'Please list all liabilities (including all debts, unpaid mortgages, or other loans):'. Below the instruction is a large text input field. At the bottom of the form is a 'SAVE & CONTINUE' button. The top of the application window has navigation buttons: '<', '>', 'PREVIEW', 'VIEW', and 'SAVE & CLOSE'.

Executors

- First choice information
- Alternate choice information

The screenshot shows a web browser window with the Thomson Reuters Contract Express application. The URL is na1.contractexpress.com/app/questionnaire/1509550/view?onfinish=%2Fpublic%2Fdocuments%3Fid%3D1509550. The application header includes the Thomson Reuters logo and the text "CONTRACT EXPRESS". The main content area is titled "Executor of the Estate" and contains the following sections:

- Residual Estate**: A green checkmark indicates completion.
- Residual Estate Beneficiaries**: A green checkmark indicates completion.
- Residual Estate Successor Beneficiaries**: A green checkmark indicates completion.
- Liabilities of the Estate**: A green checkmark indicates completion.
- Executors**: The current section, highlighted in grey.
- Health Care Power of Attorney**: A green checkmark indicates completion.
- Health POA - Health Decisions**: A green checkmark indicates completion.

The "Executor of the Estate" section includes the following text and form fields:

The Executor is the person responsible for carrying out the terms of the will. Name an Executor and an alternate, in case the first choice Executor is unable or unwilling to serve for any reason.

Who do you name as Executor?

First choice - Full name:*
-- Select or Enter Other --

Please ensure the Relationship and Address below are correct. If selecting a name from the list, note that default Relationship and Address answers will only update the first time you visit this page.

Relationship:*
Select...

Address (please enter City, State):*
[Text input field]

Alternative Executor

Do you wish to name an alternative (successor) executor at this time?*

☐ Yes
☐ No

Yes is recommended. However, if you are not ready to name a successor executor today, then select No.

At the bottom of the form, there is a "SAVE & CONTINUE" button and navigation arrows.

Notes for CDEL

Questionnaire Feedback

Final Page

- Save and close when questionnaire completed

CDEL QUESTIONNAIRE ANSWERS SHEET

Client: { . . . }

INTRODUCTION	
CDEL Estates Package - Introduction	
QUESTIONNAIRE USER	
Questionnaire User	
First name:	UNKNOWN
Last name:	UNKNOWN
Role with CDEL:	UNKNOWN
Email address:	UNKNOWN
Is this questionnaire use for testing purposes only?	UNKNOWN
CDEL PROGRAM & CLIENT	
CDEL Program	
Please select the client's applicable CDEL Program:	UNKNOWN
Client	
Client's first and middle names	UNKNOWN
Client's last name (surname)	UNKNOWN
CDEL LIMITED CLIENT AGREEMENT	
CDEL Limited Client Agreement Acceptance	
Has the client given verbal agreement to CDEL's Limited Client Agreement?	UNKNOWN
CDEL . . . - Electronic Signature	
. . . : Would you like this system to add your /s/ electronic signature to the Limited Client Agreement? (/s/ . . .)	UNKNOWN
OTHER COUNSEL	
Other Counsel	
Has the client spoken to any other attorneys about this matter?	UNKNOWN
Did the client retain another attorney?	UNKNOWN
Name and address of attorney / other notes:	UNKNOWN
DEMOGRAPHICS INFORMATION	
Demographics and Veteran Information for CDEL	
Do you need to collect client's income and demographic data for CDEL?	UNKNOWN



Is the client a veteran or the spouse of a veteran (of the United States military)?	UNKNOWN
Client is the:	UNKNOWN
DEMOGRAPHICS DETAILS	
Demographics	
Date of birth:	UNKNOWN
Gender:	UNKNOWN
Are you a U.S. citizen?	UNKNOWN
Race/ethnicity:	UNKNOWN
Do you live with a disability?	UNKNOWN
Nature of disability:	UNKNOWN
VETERAN QUESTIONS	
Veteran Questions	
Veteran's last four digits of Social Security Number:	UNKNOWN
Language spoken at home:	UNKNOWN
Education, highest level attained:	UNKNOWN
Employment status:	UNKNOWN
Housing:	UNKNOWN
Military Branch	UNKNOWN
Veteran's Rank (highest attained)	UNKNOWN
Military service entry year	UNKNOWN
Military service exit year	UNKNOWN
Number of Foreign Deployments	UNKNOWN
Current military service status	UNKNOWN
Discharge status	UNKNOWN
CLIENT'S ADDRESS	
Client's Address	
Street address:	UNKNOWN
City:	UNKNOWN
State:	UNKNOWN
Zip code:	UNKNOWN
County:	UNKNOWN
MARITAL STATUS	
Marital Status	
Marital status:	UNKNOWN
Spouse's full name:	UNKNOWN
Are you dis inheriting your spouse?	UNKNOWN
Former spouse's full name:	UNKNOWN
Year of divorce:	UNKNOWN
Year of death:	UNKNOWN
CHILDREN	



Children	
Do you have children (by birth or adoption) that you want to provide for?	UNKNOWN
Are any of your children under age 18 (minors)?	UNKNOWN
Do you want to provide for future children?	UNKNOWN
Do you have step-children (who you have not adopted) that you wish to treat the same as your children for purposes of sharing in your estate?	UNKNOWN
Children Details	
How many children do you have (by birth or adoption)?	UNKNOWN
Are you disinheriting any child?	UNKNOWN
Are you disinheriting all your natural born /adopted children?	UNKNOWN
How many step-children do you wish to provide for in your will?	UNKNOWN
HOUSEHOLD	
Household	
Number of adults in household (including yourself):	UNKNOWN
Number of minors (persons under 18) in household:	UNKNOWN
HOUSEHOLD MEMBERS	
Household Members - You	
Your name	UNKNOWN
Age:	UNKNOWN
Total monthly income:	UNKNOWN
Source(s) of income:	UNKNOWN
GUARDIANSHIP FOR MINOR CHILDREN	
Will: Guardianship for Minor Children	
Do you wish to include a guardian section in the will?	UNKNOWN
Do you wish to nominate a sole guardian (and successor guardian) or co-guardians?	UNKNOWN
First Guardian	
First choice of Guardian - Full name:	UNKNOWN
Address:	UNKNOWN
Phone number:	UNKNOWN
Second Guardian	
Second choice of Guardian - Full name:	UNKNOWN



Address (at least City, State):	UNKNOWN
Phone number:	UNKNOWN
REAL PROPERTY	
Real Property	
Do you own residential property (your home)?	UNKNOWN
We strongly advise Illinois homeowners execute a Transfer on Death Instrument (TODI) to simplify title passage of their residential property. If you do not execute a TODI, you can still specify who should receive the residential property in your will. You may select here if you want to opt out of generating a TODI.	UNKNOWN
Do you own any other real property (that will not be transferred via a TODI)?	UNKNOWN
REAL PROPERTY INFORMATION	
Residential Property Information	
Property address: Street address	UNKNOWN
Property address: City, State (Illinois) and Zip	UNKNOWN
County where the property is located:	UNKNOWN
Property Identification Number ("PIN"). This should be in the format 12-12-123-123-1234	UNKNOWN
Property legal description:	UNKNOWN
Who is on the title for the residential property?	UNKNOWN
How is the title held?	UNKNOWN
Other Real Property Information	
Please list your other real property, including the address, who is on title, and how title is held (if multiple people are on title - e.g., joint tenant or tenants in common):	UNKNOWN
TODI BENEFICIARIES SETUP	
TODI Residential Property Beneficiaries	
How many Beneficiaries of your residential property should be listed on the TODI?	UNKNOWN
Multiple Beneficiaries	
How should the property beneficiaries take title?	UNKNOWN



TODI SUCCESSOR BENEFICIARIES	
TODI Successor Beneficiaries	
Would you like to specify who the property should transfer to if the named . . . you?	UNKNOWN
...	UNKNOWN
Draft the custom succession language here, including all necessary punctuation:	UNKNOWN
Named Successor Beneficiary	
TODI successor beneficiary's full name:	UNKNOWN
Relationship:	UNKNOWN
Address (please enter City, State):	UNKNOWN
ADDITIONAL ASSETS	
Additional Assets	
Do you have a safe deposit box?	UNKNOWN
Is there an additional signatory?	UNKNOWN
Name of the safe deposit box additional signatory:	UNKNOWN
Name of bank and address where the safe deposit box is located, and any other notes:	UNKNOWN
Do you have life insurance?	UNKNOWN
For each policy, enter the name of the life insurance company, value of policy, names of beneficiaries:	UNKNOWN
Do you have a retirement account?	UNKNOWN
Enter the name of the holder of account, value of account, and names of beneficiaries:	UNKNOWN
Do you own a vehicle(s)?	UNKNOWN
For each vehicle, please enter the make and model, value, and name(s) on title:	UNKNOWN
Do you own stocks?	UNKNOWN
Stocks value (approximate current value):	UNKNOWN
Do you own bonds?	UNKNOWN
Bonds value:	UNKNOWN
Do you have a bank account(s)?	UNKNOWN
For each account, please list: Name of bank, type of account (e.g., savings or checking), last 4 digits of the account number (x5555), value of account, and if it is a joint account or "pay on death account":	UNKNOWN
Do you have any other property not yet mentioned?	UNKNOWN
Please list additional property:	UNKNOWN



SPECIFIC GIFTS	
Distribution of the Estate - Specific Gifts	
Do you wish to leave any certain assets or items of personal property (e.g., savings account, vehicle, cash gift, jewelry, or other asset) to a specific person or a charity?	UNKNOWN
RESIDUAL ESTATE	
Residual Estate	
How many beneficiaries of the residuary estate would you like to name?	UNKNOWN
RESIDUAL ESTATE SUCCESSOR BENEFICIARIES	
Residual Estate Successor Beneficiaries	
Would you like to specify who the residual estate should pass to if the named . . . you?	UNKNOWN
. . .	UNKNOWN
Successor beneficiary name:	UNKNOWN
Relationship:	UNKNOWN
Address (at least City, State):	UNKNOWN
Draft the custom succession language here, including all necessary punctuation:	UNKNOWN
LIABILITIES OF THE ESTATE	
Liabilities of the Estate	
Please list all liabilities (including all debts, unpaid mortgages, or other loans):	UNKNOWN
EXECUTORS	
Executor of the Estate	
First choice - Full name:	UNKNOWN
Relationship:	UNKNOWN
Address (please enter City, State):	UNKNOWN
Alternative Executor	
Do you wish to name an alternative (successor) executor at this time?	UNKNOWN
Alternative executor's full name:	UNKNOWN
Relationship:	UNKNOWN
Address (please enter City, State):	UNKNOWN
HEALTH CARE POWER OF ATTORNEY	
Health Care Power of Attorney	
Do you already have a current Power of Attorney for Health Care?	UNKNOWN



Would you like CDEL to assist you in drafting a Power of Attorney for Health Care now?	UNKNOWN
Health Care Power of Attorney: Health Care Agent - First Choice	
Agent's full name:	UNKNOWN
Relationship:	UNKNOWN
Address (please at least include City, State):	UNKNOWN
Phone number:	UNKNOWN
Successor Health Care Agent #1	
Are you naming a successor health care agent (to act if the agent selected above is unable or does not want to make health care decisions for you)?	UNKNOWN
Successor Health Care Agent's full name:	UNKNOWN
Relationship:	UNKNOWN
Address (please at least include City, State):	UNKNOWN
Phone number:	UNKNOWN
Successor Health Care Agent #2	
Are you naming a second successor health care agent (to act if the agents selected above are unable or do not want to make health care decisions for you)?	UNKNOWN
Successor Health Care Agent #2's full name:	UNKNOWN
Relationship:	UNKNOWN
Address (please at least include City, State):	UNKNOWN
Phone number:	UNKNOWN
HEALTH POA - HEALTH DECISIONS	
Health Care Power of Attorney - Health Care Decisions	
If you need a court appointed guardian, do you want the Health Agent you've named to act as your guardian?	UNKNOWN
There are 3 choices for when the health care power of attorney becomes active. Which is your preference:	UNKNOWN
Please select which statement is more in line with your wishes when it comes to end of life care:	UNKNOWN
Are there any limits you want to place on your health care agent (for example, certain procedures like autopsy, organ donation, burial)?	UNKNOWN
LIVING WILL DECLARATION	
Living Will Declaration	



Have you reviewed and understand the Living Will Declaration?	UNKNOWN
BURIAL ARRANGEMENTS	
Burial Arrangements	
Please select your burial/cremation preference:	UNKNOWN
If you have prepaid burial or cremation arrangements or specific wishes, please provide the details here (including plans and name of organization):	UNKNOWN
PROPERTY POWER OF ATTORNEY NOTICE	
Property Power of Attorney	
Do you already have a current Power of Attorney for Property?	UNKNOWN
Would you like CDEL to assist you in drafting a Power of Attorney for Property today?	UNKNOWN
Property Power of Attorney Notice	
Have you (the client) reviewed and understand the "Notice to the Individual Signing the Illinois Statutory Short Form Power of Attorney for Property"?	UNKNOWN
PROPERTY POA - AGENTS	
Property Power of Attorney: Property Agent - First Choice	
Agent's full name:	UNKNOWN
Relationship:	UNKNOWN
Address (please at least include City, State):	UNKNOWN
Phone number:	UNKNOWN
Property Agent - Successor Agent #1	
Do you wish to name a successor property agent (to act if the agent selected above is unable or does not want to make property decisions for you)?	UNKNOWN
Successor Property Agent's full name:	UNKNOWN
Relationship:	UNKNOWN
Address (please at least include City, State):	UNKNOWN
Phone number:	UNKNOWN
Property Agent - Successor Agent #2	
Do you wish to name a second successor property agent (to act if the agents selected above are unable or do not want to make property decisions for you)?	UNKNOWN
Successor Property Agent #2's full name:	UNKNOWN



Relationship:	UNKNOWN
Address (please at least include City, State):	UNKNOWN
Phone number:	UNKNOWN
PROPERTY POA - AGENT POWERS	
Property Power of Attorney - Agent's Powers	
Default Powers: The below is a list of default powers granted to Property Agents. If you do not wish to grant all these powers, you may select to STRIKE (not grant) them here, otherwise they will be included:	UNKNOWN
Power Limits: Does the client want to place any limits on the property agent's powers?	UNKNOWN
Describe the limits:	UNKNOWN
Extra Powers: Note, while the default Property Power of Attorney is very broad, there are a few powers that are not included by default. These include the ability to make gifts and change beneficiaries on accounts like life insurance policies or bank accounts. Here you can also allow your agent to access your digital assets like social media and other online accounts. Would you like to add any of these powers?	UNKNOWN
Select the extra powers you would like to grant your property agent:	UNKNOWN
PROPERTY POA - OPTIONS	
Property Power of Attorney Options	
Ability to delegate powers: Do you want your agent to have the ability to delegate the power you give to the agent to another person?	UNKNOWN
Delegate's full name:	UNKNOWN
Agent Compensation: Your agent will always be able to be reimbursed for any expenses incurred when acting for you. Do you want your agent to be able to take compensation for the time the agent spends acting for you?	UNKNOWN
Compensation: Not to exceed (amount)...	UNKNOWN
...per (time period):	UNKNOWN
Property Power of Attorney shall become effective:	UNKNOWN
Property Power of Attorney shall terminate:	UNKNOWN



IMPORTANT BENEFITS INFORMATION	
Important Benefits Information	
Do any intended beneficiaries named in the will or on the TODI receive SSI, Medicaid or LINK (food stamps) benefits?	UNKNOWN
Please select the beneficiary name(s) who receive SSI, Medicaid or LINK (food stamps):	UNKNOWN
NOTES FOR CDEL	
Notes for CDEL Files	
Preparer: Please enter any other notes relevant for CDEL's files	UNKNOWN
Questionnaire Feedback	
Help us improve this questionnaire! Please provide any feedback you would like to share, including whether there were areas that you found confusing or areas that would benefit from additional guidance.	UNKNOWN
FINAL PAGE	
Final Page	
Save & Close	