



If your firm uses Court of Protection forms, and you are not using workflow software, FormEvo can help you save time and improve risk management.

Specific workflow bundles such as the COP workflow can be used to save significant time and reduce the opportunity for errors across form bundles.

All forms and schedules that are related to each other are linked through auto population. This helps busy probate lawyers to accurately, and easily, complete these complex forms using automated calculations.

KEY FEATURES AND BENEFITS

- Work on multiple forms and schedules simultaneously
- Print all linked forms and schedules in one batch
- Set up templates for common matters to improve practice competences
- Add or remove relevant schedules for matters whilst brought forward figures auto update - delivering a smooth process
- Use a linked navigation panel to save the time it takes to find all the forms and schedules for each matter
- Automated calculations of asset values, and complex inheritance tax due figures, provide greater accuracy and time savings for the system user
- Locked totals prevent users accidentally overtyping - but they can unlock these fields if required

Court of Protection Application form

For office use only

Case no. _____

Application no. _____

Date received _____

Date issued _____

SEAL

Full name of person to whom the application relates (this is the name of the person who lacks, or is alleged to lack, capacity)

Your application will not be complete unless all the relevant forms and annexes, including where appropriate COP3 (and COP4), are submitted together with a fee or remission request (Please see COP1 guidance). Please submit the COP1 application form in duplicate.

This form is not to be used in respect of applications concerning deprivation of liberty (DOL) under section 21A of the Mental Capacity Act 2005 (the Act) relating to a standard or urgent authorisation under Schedule A1 or the streamlined application under section 4A(3) and 1(2)(b) of the Act. For those applications please visit our website at www.gov.uk/court-of-protection

Section 1 – Type of application

1.1 What type of application do you intend to make?

Deputy, proposed deputy or other:	Tick	Enclose Annex/Form:
Appointment of deputy for property and affairs	<input type="checkbox"/>	COP1A
Property and affairs (where deputy not required)	<input type="checkbox"/>	COP1A
Appointment of deputy for personal welfare	<input type="checkbox"/>	COP1B
Personal welfare order (where deputy not required)	<input type="checkbox"/>	COP1B
Application relating to a statutory will, codicil, gift(s), deed of variation or other settlement of property	<input type="checkbox"/>	COP1C
Application relating to the appointment or discharge of a trustee	<input type="checkbox"/>	COP1D and COP12
Application by existing deputy	<input type="checkbox"/>	COP1E
Other applications	<input type="checkbox"/>	COP24
Enduring Powers of Attorney (EPA) or Lasting Powers of Attorney (LPA):	Tick	Enclose Annex/Form:
Question of validity or operation of an EPA/LPA	<input type="checkbox"/>	COP1F
Application relating to a statutory will, codicil, gift(s), deed of variation or other settlement of property	<input type="checkbox"/>	COP1C
Application relating to the appointment or discharge of a trustee	<input type="checkbox"/>	COP1D and COP12
Application by existing attorney	<input type="checkbox"/>	COP1E
Other applications	<input type="checkbox"/>	COP24

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“Automatic population of supplemental forms following initial data entry, and accompanying calculations, enables accurate and quick completion of forms”

By eliminating the repetitious entry of case information into COP forms, you will save hours of time with this creative workflow approach.

Filling out the pertinent case information only has to be done once, and the CoP forms will automatically get the information.

“Some forms are combined into bundles where we can auto populate data across multiple forms and set up auto calculations that can take out up to 80% of the time to complete as non-bundled forms”

The CoP workflow will pre-populate names and addresses of all parties across 14 different forms. This will allow for up to:

- 4 Applicants/Proposed Deputies
- 4 Attorneys
- 4 People to notify
- 2 Witnesses
- 2 Trustees
- 1 Donor
- The person whom the application relates

The data entry form has ‘Copy’ buttons for copying names, addresses, telephone numbers etc, avoiding the re-keying of the same data speeding up the data entry process.

You have the option to add forms to the bundle either as you need them or select them all at once before you begin. Individual forms can be shared with clients for them to view only, or view and actual edit.

With the COP workflow, you can:

- Easily create a separate COP4 for every Applicant including both witnesses,
- Create a separate COP15PADep. Suggested Texts are also available which can be used when shared and completed by a client to copy back into the form if instructed by their legal rep

Other benefits include being able to set Reminder/Deadline buttons when a notified date has been confirmed, add bookmarks for easy navigation and completed Section check boxes are available for keeping track on where each form is at in terms of completion.

The image shows a computer monitor displaying a software interface for managing legal forms. The interface includes a sidebar with a list of form bundles and a main window showing a 'Financial statement' form. The form is partially filled out with green text. Below the monitor, a printed version of the 'Financial statement' form is visible. The printed form has a header section for 'To be completed by the relevant party' with fields for 'Name of court', 'Case No.', 'Name of Applicant', and 'Name of Respondent'. It also includes a section for 'The parties are' with checkboxes for 'Spouse' and 'Civil partner'. At the bottom, there is a section for 'Solicitor's fee' with a field for 'Solicitor's fee account no.' and a field for 'Name and address of solicitor'.

“FormEvo can be integrated with many Case Management and Document management Systems and even your 'Searches' Provider. Data-Mapping is much easier than traditional on-prem' applications through the use of Common Field Naming conventions.”

If you'd like to know more, contact us at enquiries@formevo.co.uk or call our Sales Director Paul on 07340 902835

