Check-Out™
PLANNING SERVICES LTD

CheckOutPlan.com

Get Started!

2019

CheckOutPlan™
Help Files

HOW WOULD YOU LIKE TO BE REMEMBERED?

Check-Out is a SAAS-based platform where subscribers can build and share a plan to manage end-of-life events & more. CheckOutPlan™ is structured into 7 steps to help families communicate and collaborate.

Check-Out Help Pages

Table of Contents

Welcome to Check-Out's Help Pages

Check-Out Planning Services provides an online experience that helps people and their families plan end-of-life events and much more. Get the most out of your Check-Out experience by reviewing our Help section.

Additional Support for Members

Support for Check-Out subscribers can be found at the following locations:

- Help Pages (You are here!)
- [Using Check-Out](#)
- [Articles in Resources](#)
- [FAQs](#)
- By email: [mailto:MemberSupport@CheckOutPlan.com?subject=Question from a Valued Member](mailto:MemberSupport@CheckOutPlan.com?subject=Question)

Chapter 1

Definitions

Learn some of the common terms used to describe various parts of Check-Out:

Subscriber: That's you!

CheckOutPlan: The result of your work and effort. Your CheckOutPlan will help guide your family and friends just when they need it most. The plan is comprised of 7 core sections, which include letter writing and photo uploads.

Your Team: The family and/or friends that you invite and assign to fulfill the final wishes outlined in your CheckOutPlan when the time comes.

The 360 Degree Method: Found in the "Taking Stock" section, this term refers to an efficient methodology supporting the process of doing an orderly inventory of a space, such as your home or storage unit.

Your Office: This is where the magic happens! You access and build your plan from this central location.

Sidebar: Navigate to all major sections necessary for building and managing your plan using this location.

Sections: Also known as Workspaces, your CheckOutPlan is comprised of these 7 key sections such as "Taking Stock" and "Making Memories."

Forms: Your CheckOutPlan is comprised of forms and letters. The forms contain all elements essential to your end-of-life plan and provide guidance for your Team Members when the time comes.

Fields: Located on forms, this is where you add the information that makes up your plan.

Letters: The letters used to communicate with family, friends and/or Team Members. They are found in sections such as "Having 'The Talk'" and "Making Memories." Letters are generally pre-written and ready for editing when you like.

Introduction: Located at the top of each form, the introduction provides an outline of the form's intent and/or goal.

Tips: Often containing helpful, time-saving ideas, these handy prompts help make the building and management of your CheckOutPlan even easier.

Grey text: The instructional text seen in many of the form fields. It disappears when you start to type in the field. Delete or Cut your content to make the grey text return.

Not Completed: This will appear on your form's completed view if a field has been left blank. We recommend adding "N/A" or "Not applicable" in a field that doesn't pertain to you to avoid confusion.

Identification Stamp: Also known as an "ID Stamp," this information is found at the bottom of a CheckOutPlan page. It is a unique identifier that helps prove its authenticity.

Recipients: The people to whom you are sending an email or letter to.

Your signature: Found at the bottom of all letters, your signature is styled as a script font (or typestyle) but can be changed to the standard font used in Check-Out used by just typing your name in the field.

Dashboards: Tables where you can view your progress and status at a glance. Review Your Progress, My CheckOutPlan and Team Dashboard are all examples and can be accessed on the Office sidebar.

Browser: The program used to both surf the Internet and to access your CheckOutPlan. Examples of popular browsers include *Chrome, Firefox* and *Safari*.

Copy and Paste: A method to move text from one field to another.

To edit: To change or update forms or files.

Executor: "A legal term referring to a person who is nominated or appointed by the creator of a will to carry out the instructions of the will.

Will: Also known as a "Last Will and Testament," this document expresses the final wishes of how a person's property is to be distributed at the time of death. As well, it may name the Executor and other people needed to manage the estate until its final distribution.

Important Buttons (Found in "Forms" and "Letters")

Add to My CheckOutPlan: Use this button to add a form to your CheckOutPlan dashboard. The status of the form will change from "Begin" to "Complete."

Save/Update: When you work on a form for the first time and choose this button, it will save your work. Once you revisit the form, the button will automatically change to "Update."

Chapter 2

Welcome to Your Office!

Your Office is the key to building your CheckOutPlan. To access this area, you need to create an account and be logged in.

The following section provides an overview of the Office homepage, as well as navigation tips to make moving through the building process fast and easy. Once you are familiar with one section, the rest of the sections will be simple to work through, as they are structured the same.

Homepage Overview
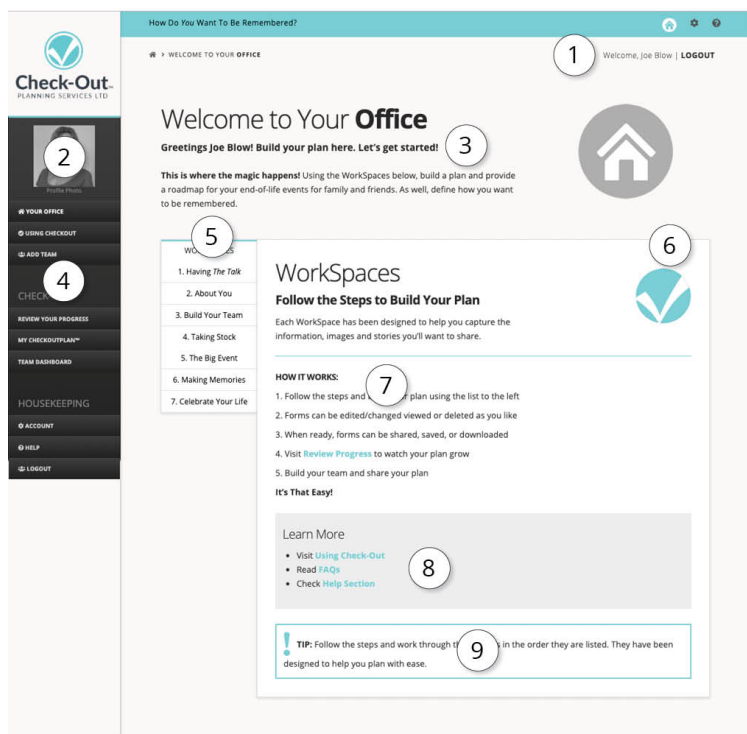
At a Glance

1. Account holder name

2. Your profile photo

3. Your name will appear here too

4. Sidebar (see below for more info)

5. Workspaces tabs

6. Icon for each section appears here

7. How it Works or Steps to Success

8. References helpful articles

9. Helpful tip

Note: Most of the elements noted here appear on the Home pages of each workspace/ section.

Your Office – Homepage.

1. **Subscriber's Name:** Your name will be visible here.

2. **Profile Photo:** Click on this space to add your profile photo.
3. **Account ID:** Your name will appear here too.
4. **Sidebar:** See sidebar details below.
5. **Workspace Tabs:** Move to other sections easily using these tabs.
6. **Section Icon:** Each section has a unique icon.
7. **How it Works or Steps to Success:** Provides a step-by-step outline for each section.
8. **Learn More or Supporting Articles:** Links to helpful articles for each section.
9. **Tip:** Helpful tips are offered for each section and can be found on most

Sidebar Overview

Profile Photo: Upload an image of yourself to personalize your account.

Your Office: This your homepage. From here, you can access all the sections of your CheckOutPlan. Return to this point any time you wish to start a new section of your plan.

Using Check-Out: An overview of how to use Check-Out, and access to the main Website.

Add Team: A shortcut to adding/providing access for Team Members. Review and edit information and delete Team Members as needed using the Team dashboard.

Review Your Progress: View and access your plan at a glance, as well as review the status of each page.

My CheckOutPlan: When ready to share, click Add to My CheckOutPlan on your forms and your Team Members will be able to access them here.

Team Dashboard: A shortcut to the Team Dashboard where you can review and edit information and delete Team Members.

Account: Manage your Check-Out account from here. Edit your personal information, including address, phone number, password and payment information.

Help: A guide to the function and features of CheckOutPlan.com. You're here now!

Logout: Exit your Check-Out account.
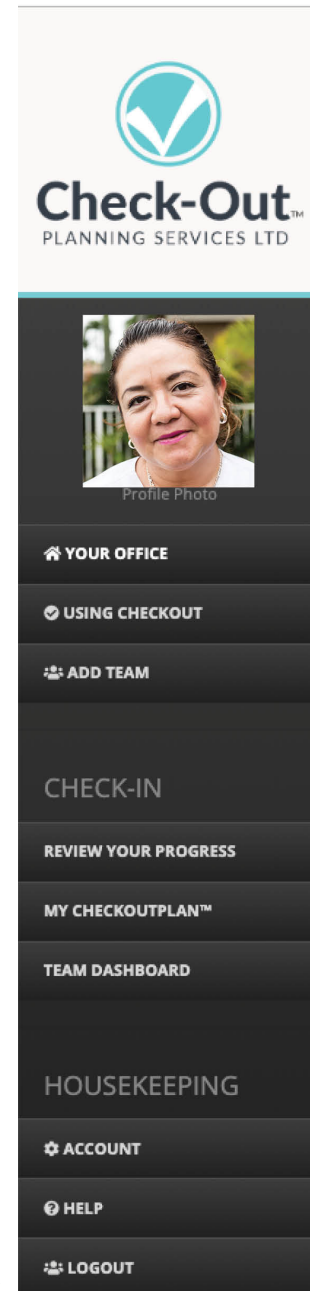
forms.

The Sidebar.

Review Your Progress: Your Progress Dashboard
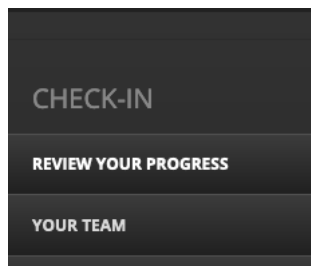
Located in the sidebar, Review Your Progress functions like a dashboard, providing an overview of your plan. Access and review actions and the status of all CheckOutPlan forms and letters.

Review Your Progress Button in the Sidebar.

Here is an outline for each column and its purpose:

Sample of Review Your Progress dashboard: Enter, View, Edit and Download your information.

Section: Indicates the form or letter.

Last Updated: This indicates the most recent date and time the form or letter was updated.

Status: Sections that do not have any entries are indicated by "Not Started" under the Status column. The Actions column invites you to "Begin This Section." Once you've begun to work on this part of your plan and choose Save or Update, the

status here will change to "In Progress." When you are ready to share your form with your Team, select (or click) Add to My CheckOutPlan. This changes the status of the form to "Complete."

Actions: This column allows you to take the following actions regarding your forms and letters:

Begin This Section: Indicates that this section has not yet been started.

Edit: Allows you to edit or update a form that is already in progress.

View and Download: Once you've clicked Add to My CheckOutPlan and Save or Update, this form or letter can be viewed and downloaded. As well, the status here changes to "Complete."

Chapter 3

Navigating Your Office

Moving around the pages and sections of Your Office is made easy by using the following navigational choices:
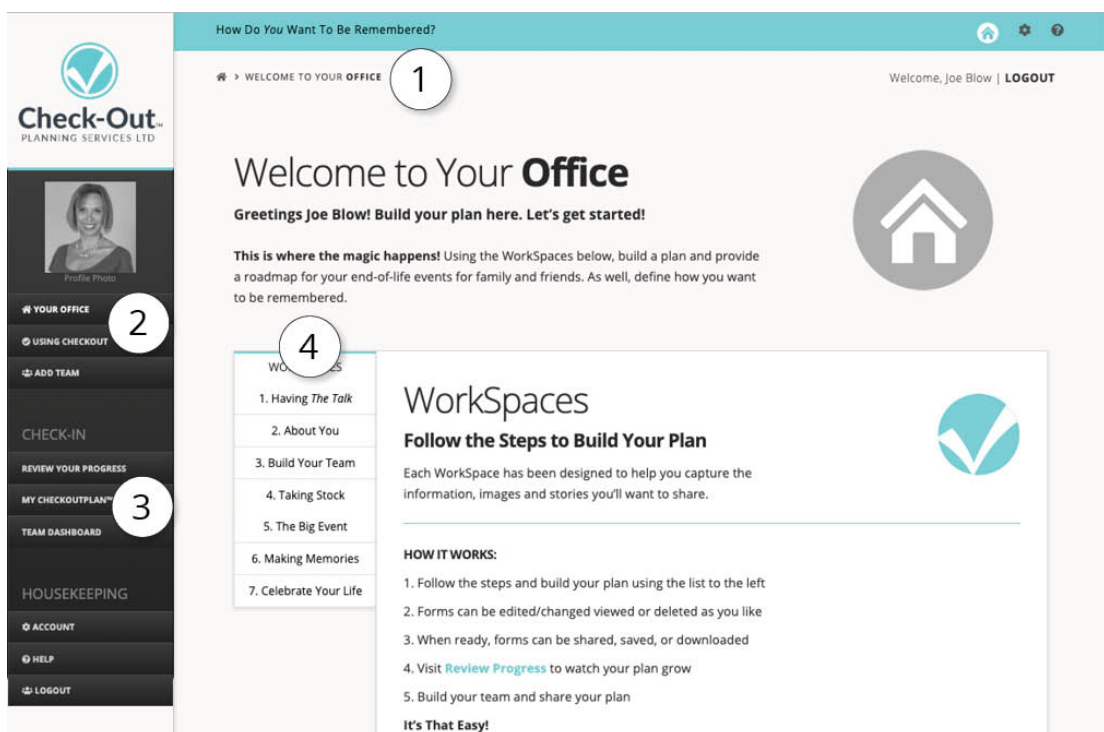
Navigation points from Office Homepage.

1. Breadcrumb Navigation: Found at the top of each form, breadcrumbs help you move from section to section and confirm your location.

2. Sidebar: The sidebar directs you to all the primary functions involved in managing your CheckOutPlan.

3. Review Your Progress, My CheckOutPlan and Team Dashboards: Located in the sidebar, these dashboards provide the ability to check the status of each section of your plan and to navigate directly to any section.

4. Your Office tabs: These tabs help you move directly to that section/workspace.

Additional Navigation on Forms and Letters

Bottom Navigation Button: Found at the bottom of each form is the Navigation direction button. You can move forward or back, form to form and section to section.

← **Next: Your Accounts** →
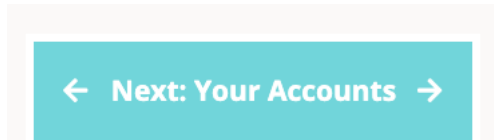
Bottom Navigation button, located at the bottom of each form page.

Progress Bar: Some of the larger sections such as, "About You - Key Facts" have multiple pages of entry. To allow for easy navigation and progress review, these sections have a Progress Bar located at the top of the page. This shows all the forms in that section, and which form you're currently on. Use the Progress Bar to navigate by clicking on the form in the Progress Bar that you wish to visit.

| About You | Your Spouse | Your Children | Your Grandchildren | Other Family Members | Friends & Colleagues |

50% Complete   4 of 6
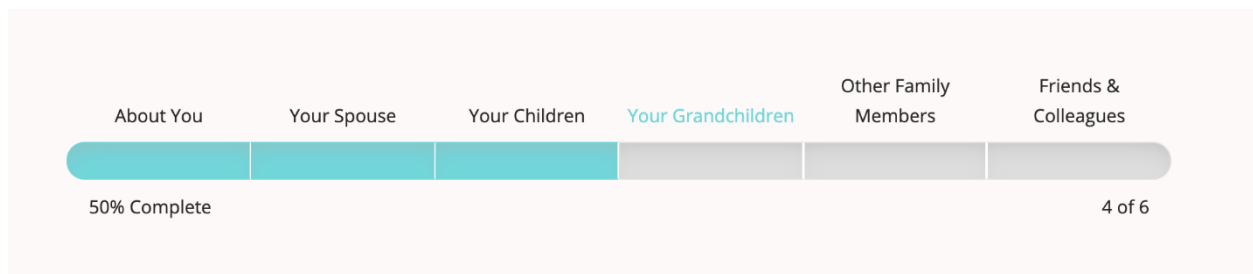
Progress Bar, helpful for longer forms.

Chapter 4

Building Your CheckOutPlan
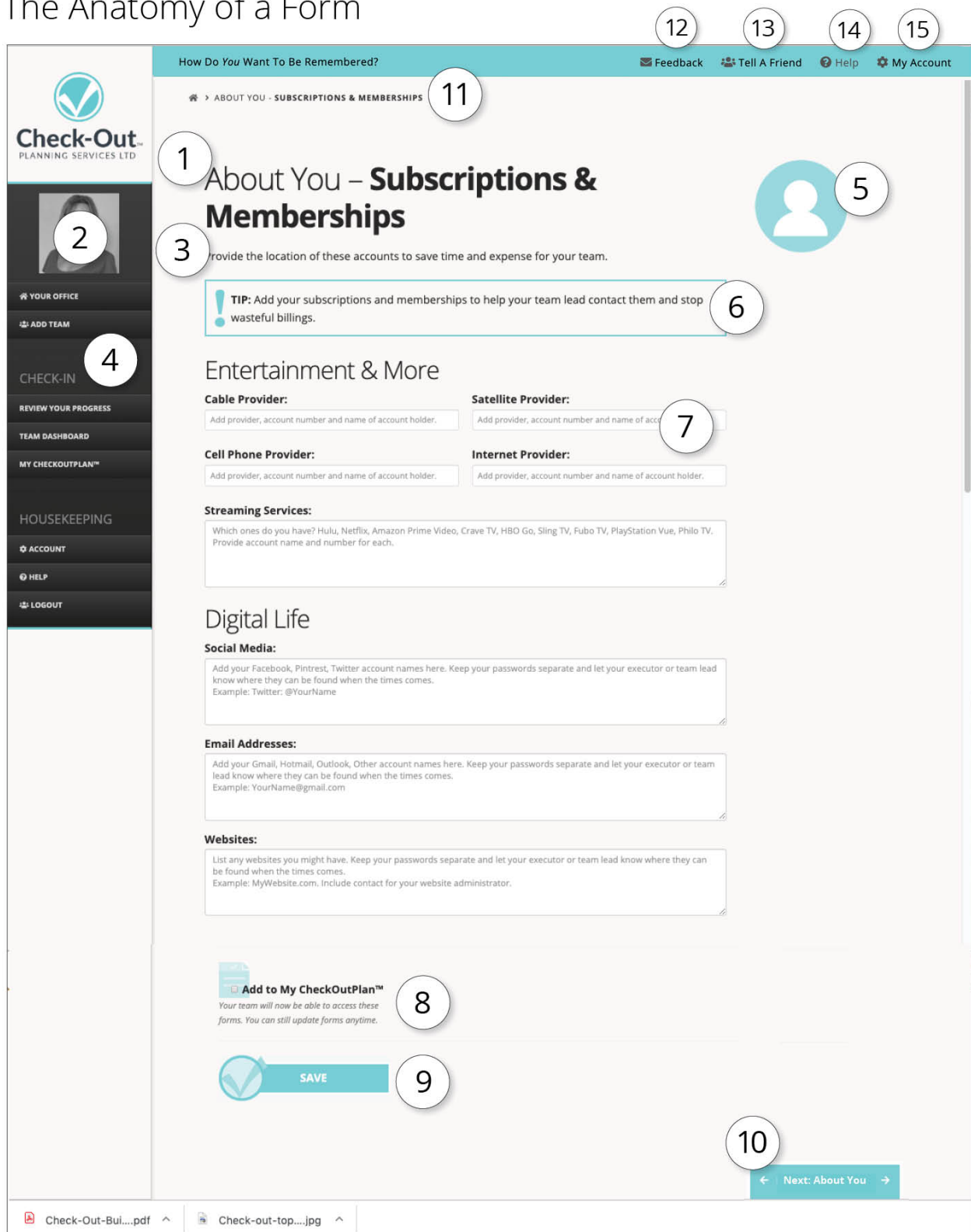
Check-Out helps you leave behind a plan that lets your family and friends know your wishes. As well, you can print and/or send certain sections to your lawyer or estate planner to save time and money now. A CheckOutPlan is comprised of the following elements:

1. **Forms:** Used to create your CheckOutPlan.

2. **Letters:** Used to communicate with loved ones.

3. **CheckOutPlan Pages:** These are created from forms once you click Add to My CheckOutPlan + Save/Update.

3. **Photo/File Uploads:** Add photos to your CheckOutPlan. These are located in sections such as "Taking Stock," "Making Memories" and "The Big Event."

4. **Team Downloads:** Add photo and files that your Team Members can later download at full size/resolution.

5. **Dashboards:** These are used to both check your form status and to navigate around the platform. These include Review Your Progress, My CheckOutPlan and Team Dashboard.

Anatomy of a Form

All forms are built to be easy to use and navigate. Here is an overview of a typical form in your CheckOutPlan.

The Anatomy of a Form

✉ Feedback   👥 Tell A Friend   ❓ Help   ⚙ My Account

🏠 › ABOUT YOU · **SUBSCRIPTIONS & MEMBERSHIPS**

Check-Out
PLANNING SERVICES LTD

🏠 YOUR OFFICE

👥 ADD TEAM

CHECK-IN

REVIEW YOUR PROGRESS

TEAM DASHBOARD

MY CHECKOUTPLAN™

HOUSEKEEPING

⚙ ACCOUNT

❓ HELP

👥 LOGOUT

About You – **Subscriptions & Memberships**

Provide the location of these accounts to save time and expense for your team.

> ❗ **TIP:** Add your subscriptions and memberships to help your team lead contact them and stop wasteful billings.

Entertainment & More

Cable Provider:

Add provider, account number and name of account holder.

Satellite Provider:

Add provider, account number and name of acc

Cell Phone Provider:

Add provider, account number and name of account holder.

Internet Provider:

Add provider, account number and name of account holder.

Streaming Services:

Which ones do you have? Hulu, Netflix, Amazon Prime Video, Crave TV, HBO Go, Sling TV, Fubo TV, PlayStation Vue, Philo TV.
Provide account name and number for each.

Digital Life

Social Media:

Add your Facebook, Pintrest, Twitter account names here. Keep your passwords separate and let your executor or team lead know where they can be found when the times comes.
Example: Twitter: @YourName

Email Addresses:

Add your Gmail, Hotmail, Outlook, Other account names here. Keep your passwords separate and let your executor or team lead know where they can be found when the times comes.
Example: YourName@gmail.com

Websites:

List any websites you might have. Keep your passwords separate and let your executor or team lead know where they can be found when the times comes.
Example: MyWebsite.com. Include contact for your website administrator.

☐ **Add to My CheckOutPlan™**
Your team will now be able to access these forms. You can still update forms anytime.

✔ SAVE

← Next: About You →

📄 Check-Out-Bui....pdf ^   📄 Check-out-top....jpg ^

A typical Check-Out form.

1. **Section Heading and Form Title:** Shown on all section pages.
2. **Profile Photo:** Click on this space to add your profile photo. Adding your profile photo can also be done through your Account screen.
3. **Introduction:** All sections have a title and introduction.
4. **Sidebar:** See sidebar details below.
5. **Section Icon:** Each section has a unique icon which appears here.
6. **Tip:** Helpful tips are offered for each section and most forms.
7. **Grey Text:** It guides you to enter the correct information in fields. If you don't complete a field, "Not completed" shows in the field and on your printout, urging you to complete that section. If that section is not relevant to you, add "Not Applicable" or "N/A" to let your Team know and to avoid confusion over an empty field.
8. **Add to My CheckOutPlan:** Click this button to share with your Team.
9. **Save or Update:** Click Save or Update to save your work.
10. **Bottom Navigation:** Use this to move from page to page.
11. **Breadcrumb Navigation:** Shows which section you're in.
12. **Feedback:** Use this link to send your comments and concerns.
13. **Tell a Friend:** Share Check-Out with a friend by filling out this window.
14. **Help:** This link takes you to this section and is available for members only.
15. **My Account:** Use this to manage or update your Check-Out account.

Creating CheckOutPlan Pages

It's easy to build CheckOutPlan with your Team using the following steps:

1. Visit Your Office to start a section.
2. Fill out the form and click Add to My CheckOutPlan + Save/Update.
3. The Review Your Progress dashboard will appear, and the form's status will be marked as "Complete."
4. Click on the action you would like: View, Edit or Download.
5. Choose View or Download to see your completed CheckOutPlan page.
6. Print or save on your computer. Your plan information is securely saved in your Check-Out account and can be accessed and worked on anytime.

CheckOutPlan Form

CheckOutPlan Page

Form becomes a CheckOutPlan page when you click Add to My CheckOutPlan + Save/Update.

The Anatomy of a Completed CheckOutPlan Page

(1) Taking Stock of Your Vehicles

This document is part of an end-of-life plan created by a subscriber of CheckOutPlan.com
The information provided here is intended to provide direction to my team.

Transportation Vehicle 01

Description: My 1966 GT Ford Mustang

(2)

License Plate: 668 STA   Insured? YES!

Keys, Registration & Insurance: 1444 Semi-Circle Street, Squareville, NV, 234VVV

Give Vehicle To: My Son, Joe Blow Jr.

Explain Why: We went for rides in this car when Joe Jr. was a baby. So, I want him to have this car because he loves that car and I want him to have it.

Completed CheckOutPlan page.

1. Title and Introduction to CheckOutPlan Page

2. Form Information

3. Uploaded Photo

4. Standard Form Instructions

5. Form ID

Viewing, Downloading/Printing Letters and Forms

Once you have completed a form or letter, or you simply want to view it, take the following steps:

1. Click Add to My CheckOutPlan + Save/Update located at the bottom of the form or letter. You will be returned to the Review Your Progress dashboard.

2. Find your section and select View from that dashboard. The system will generate the completed form for you to view.

3. Hover your pointer at the top of the letter or form and a dropdown menu will appear giving you options, such as Print, Download or Zoom.

Tips for Completing Forms

Here is an overview to help with filling out forms and letters, both of which are important aspects of building your CheckOutPlan.

Entering Content/Keeping Your Form Content Neat
The number of characters you can type in each field is limited to allow for nicely formatted, printable forms. The "Max Characters" are indicated for each field of your form. When the maximum number of characters have been entered in a field, the system will not allow more content to be entered.

Note the Brackets

Most often seen in letters (rather than forms), brackets are used to indicate specific details that you will need to add. Since much of the content in letters is pre-written, brackets indicate that specific information is needed to complete this section of the form.

Pre-written content with brackets.

Saving Space

If you wish to add several items (like a list) in a field, use slashes (/) and not the Return/ Enter button. Instead, separate content using a slash (/). In this way, you'll have much more space to add information into the field.

Grey Text

Found in most form fields, "grey text" is informational content intended to provide members with guidance on the type of content needed. This temporary text disappears when you begin to type in that field.

Tip: If you wish the grey text to reappear, simply delete all the content in that field.

Typical location of grey text.

Use "N/A" to Avoid Confusion: When a form or field doesn't apply to you, for example, if you don't have grandchildren, type "N/A" (Not Applicable). This will let your Team know that rather than having forgotten to complete a field or section that it didn't pertain to you. If a field is left unchanged or blank, "Not Completed" will appear in those fields of your plan.

Resetting a Form: When a form is in progress, simply unselect the Add to My CheckOutPlan button and click Save or Update. The form will be reset and any content you added will be removed. The form will revert to show the original grey text content.

Keeping Forms or Letters Private: Do not click Add to My CheckOutPlan + Save/Update. The status of the form will remain "In Progress." Team members will not be able to view this content.

Locked Versus Unlocked Forms:
Forms that have content that need to be copied to complete a task, such as The Event Program or Eulogy, are unlocked, meaning the content can be copied and pasted from the PDF file. All other forms are locked, meaning the content cannot be copied, thereby protecting your original intentions.

Options for Completing or Saving Your Work

Three options appear on the bottom of most forms and letters:

Add to My CheckOutPlan: When you chose this option, the form or letter becomes part of your CheckOutPlan and is now visible and accessible by your Team. The status of your form or letter changes to "Complete."
Note: You need to also click Save or Update to complete this action.

Send as Email: Available only on letters. When you select this feature, a copy of the letter is automatically sent to your recipient(s).
Note: You need to also click Save or Update to complete this action.

Save: Save the work you've done on your form, and to complete an action like Add

to My CheckOutPlan. After the first time you save a form or letter, an Update button will replace Save. When you Save, the status of the form will change from "Begin This Section" to "In Progress" in the Review Your Progress dashboard.

Update: When you return to update a form that's in progress, select the Update button to save your most recent work.

Uploading Photos

In sections such as "Taking Stock," you can upload and save photos of your favorite items to help with their identification. There are no size restrictions on the file size you upload since the photo will be compressed to fit on the completed, printable form. Photo file formats such JPEG and PNG are allowed. Click on the Photo Upload window and choose a photo file from your system or simply drag and drop a file onto the window.

Note: The download feature is not available for these images, meaning they cannot be downloaded at a later date.
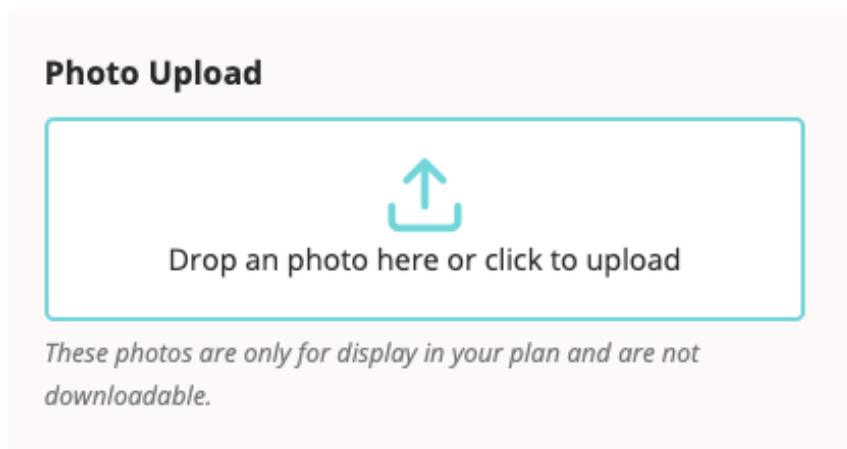
Photo upload window.

Once the photo has been uploaded, it will look like this on the form. It will appear larger on the printable form. To remove or delete a photo, click on the blue X inside the circle.
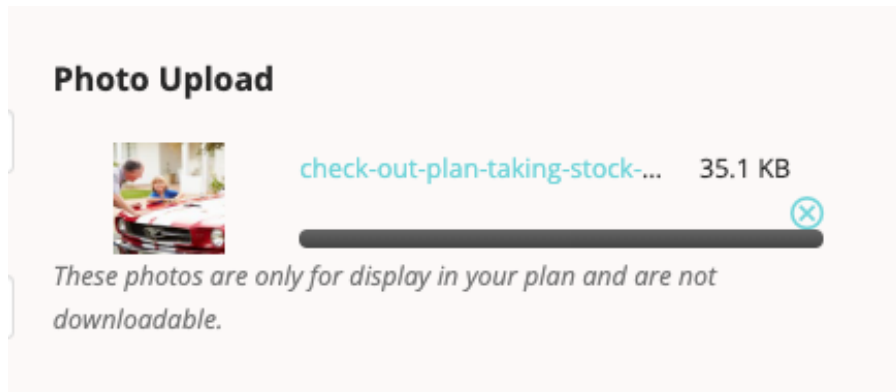
*Image attached in Photo Upload window.*

Team Downloads: Photo & Document Files

Your Team will want to access certain photos or documents when it's time. Sections in Check-Out such as "The Big Event," "Making Memories" and "Celebration of Life" allow subscribers to upload photos and documents and for their Team Members to download this content. Providing your Team with downloadable photos helps them better identify specific objects and provides photos to accompany a personal story in sections like "Making Memories."

The Team Downloads feature supports all major image and document file formats. Files need to be 30 MG or less for upload. Files can be downloaded at full size/resolution.

Example: *Your obituary. It will be necessary for your Team to download the photo you have chosen as the feature image for the newspaper. Your Team will be able to download these files at the same quality as they have been uploaded at.*

Upload Team Downloads using these windows:
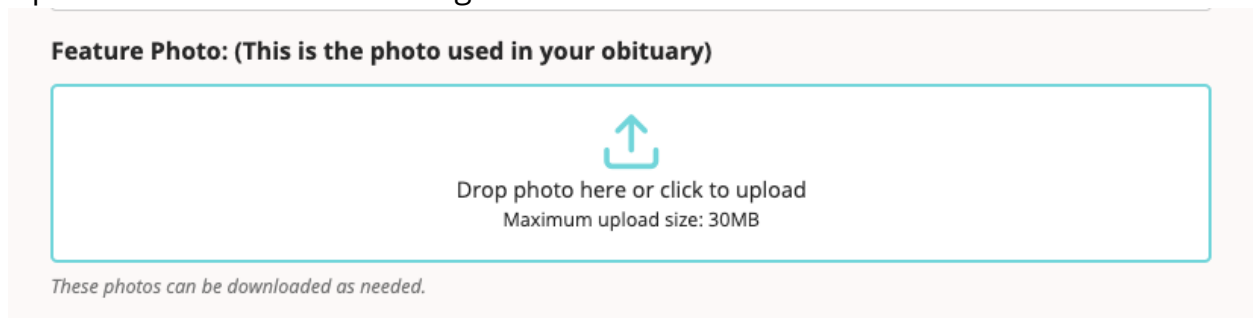
Photo uploaded in the Team Downloads window.
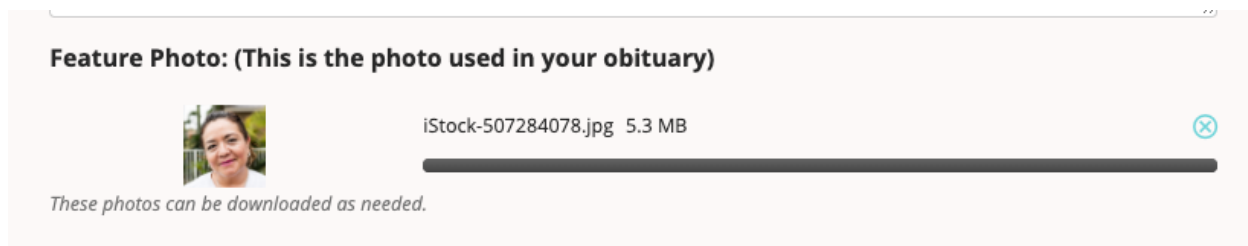
Example of photo uploaded.

How to Download Team Downloads

Photos and files can be both viewed and downloaded by going to either the My CheckOutPlan or Review Your Progress dashboards. Photos and files will be located at the bottom of the section. Click the Download button on the right side.
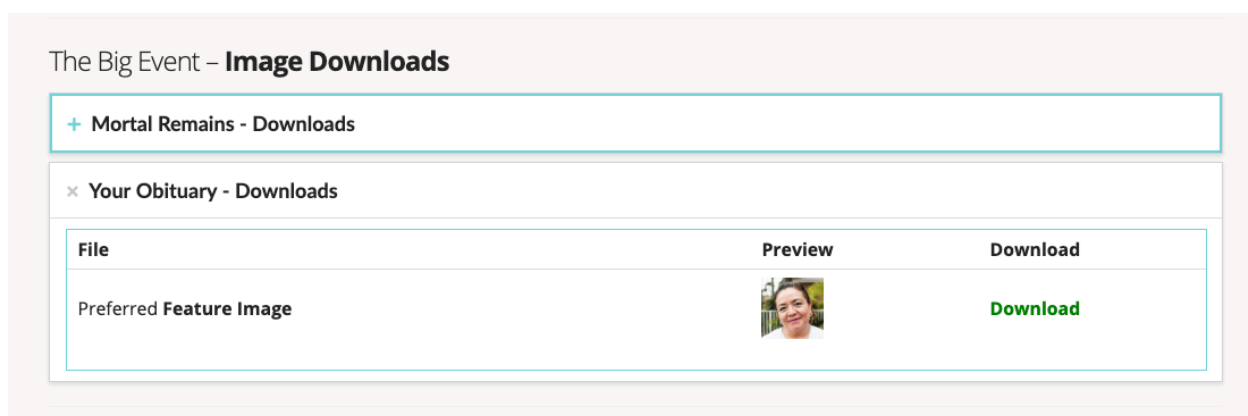
Photo is ready to download at the My CheckOutPlan dashboard or Review My Progress dashboard.

To Upload or Download Documents: Follow the same process as photo uploads/downloads.

Chapter 5

About Letters

Create Letters Quickly and Easily
Besides forms, CheckOutPlan provides letters that can be used to communicate with family, friends and Team Members. These are a few ways Check-Out Letters can be used to support the building of your plan:

1. Communicating with family and friends about your intent to build a CheckOutPlan.
2. Asking family and friends for their input on your plan.
3. Inviting and welcoming Team Members.
4. Asking loved ones to contribute stories or photos to your "Making Memories" folder.

The Anatomy of a Completed Letter

The letter is generated when you select Add to My CheckOutPlan + Save/Update at the bottom of your form. Letters are comprised of the following elements:
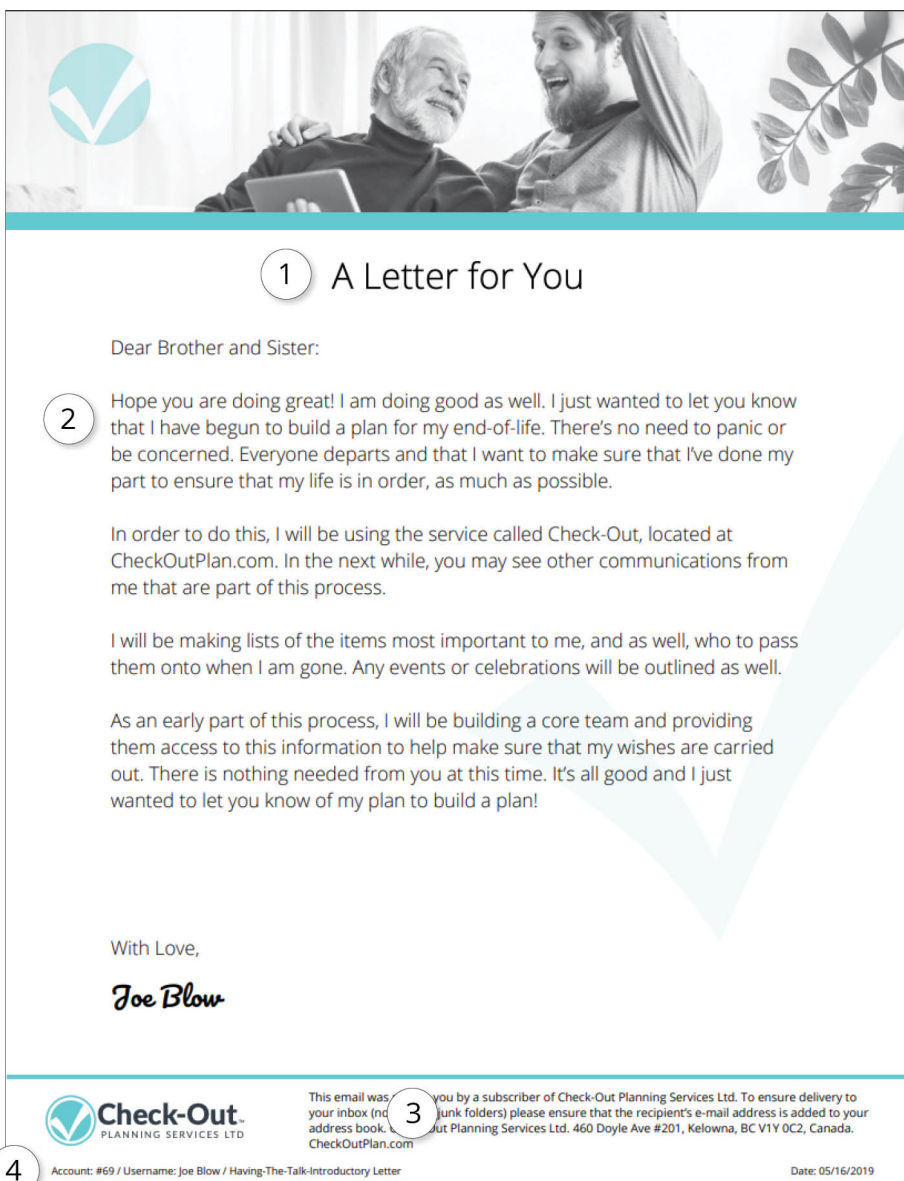
1. Letter Title and Heading
2. Letter's Body Content
3. Statement
4. Identification Stamp

Viewing, Downloading/Printing Letters and Forms

Once you have completed or simply want to view a form or letter, take the following steps:

1. Click Add to my CheckOutPlan + Save/Update located at the bottom of the form or letter. You will be returned to the Review Your Progress dashboard.

2. Find your section and select View from that dashboard. The system will generate the completed form for you to view.

3. Hover your pointer at the top of the letter or form and a dropdown menu will appear giving you options such as Print, Download or Zoom.

Viewing a Letter or Form
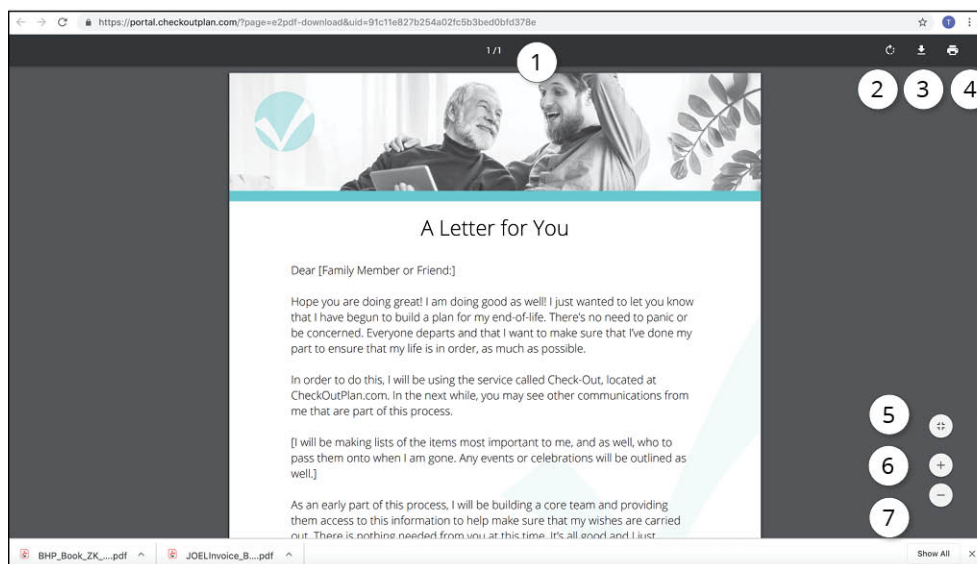
A letter in View mode.

1. Page Count

2. Rotate File Clockwise

3. Download File

4. Print File

5. Fit to Page

6. Zoom In

7. Zoom Out

Sending a Letter as an Email
Letters are unique in the sense that they can be directly emailed to a recipient from within Check-Out. Sending your completed letter as an email is as easy as selecting Email This Letter? and then clicking Save or Update.
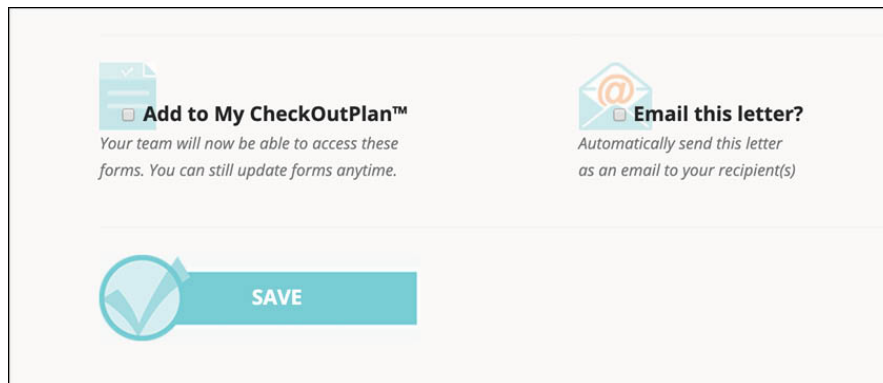
Email This Letter? button on right.

Send A Letter as An Email to One Person or Several: Simply add the email address of the person you wish to email your letter to. If more than one person is desired, separate email addresses with a comma:

joeblow@email.com, sammysquare@email.com, suesomething@email.com

Adding More Letters Or Items

If you would like to write more letters or items on forms, simply click on and slide the toggle to the right to activate. A new letter will appear below:

Asking for Input Letters

Located in the "Having 'The Talk'" section.

This section is intended to help subscribers ask for input from family and friends on matters related to planning end-of-life events. Pre-written questions are provided as a guide to get started:

1. Prepare your Asking for Input Letter.

2. Email to your loved ones/recipients.

3. Once you have received replies to your questions, paste them into the Responses box below and click Save or Update.

Location of Responses in the Review Your Progress dashboard.

Once you have received responses to your questions, you can paste them into the Responses form to keep this information all in one location for easy reference. Access Responses from the Review Your Progress dashboard. Click Save or Update to save them for future reference.

Here's how: To save responses from loved ones in one spot, go to their email, and Copy and Paste their replies into the Responses form found in Review Your Progress and click Save or Update.

Note: This Responses folder is kept private from your Team and is for your eyes only. It does not appear on the My CheckOutPlan dashboard.

Just-in-Case Letters

Located in the "Having 'The Talk'" section.

Because the content of these letters may be considered extra private, these letters have a slightly different workflow. Since these letters are meant to be shared after you pass, you can assign a Team Member to send your Just-in-Case letter when the time comes, or you can send the letters yourself as you like. Here's how:

1. Write the Just-in-Case letter using the pre-written text as a guide.

2. Assign the letter to a highly trusted Team Leader/Member and provide instructions on when and how you would like the letter to be delivered.

3. Email the letter to that assigned Team Member for safekeeping. Since it may be wise to have a backup, you can assign more than one Team Member.

4. It is possible to treat this letter as any other and send it to several people at the same time by adding extra email addresses and separating addresses with commas. You may also choose Add to My CheckOutPlan + Save/Update for the entire Team to access it when the time comes.

5. Letters can be viewed in the Review Your Progress folder. Go to the "Having 'The Talk'" section and visit your *Just-in-Case Letter* folder. Note that these letters will not be visible to Team Members unless you choose to Add to My CheckOutPlan.

Chapter 6

Build Your Team

Your Team consists of the family and friends entrusted with fulfilling your CheckOutPlan when the times comes. Adding Team Members to your CheckOutPlan also means that they will have access to all the letters and forms where you have chosen Add to My CheckOutPlan + Save/Update. Once Team Members have been invited and have agreed to assist you with the details of your plan, adding and managing them is easily done.

Selecting Team Leaders and Members:

Visit the Team Support Page for the qualities good Team Members should possess: https://checkoutplan.com/resources/team-support/

Inviting Team Members:

Once you've identified the best potential Team Members, send invites to them using the pre-written letters in Step 1 of the "Build Your Team" process:
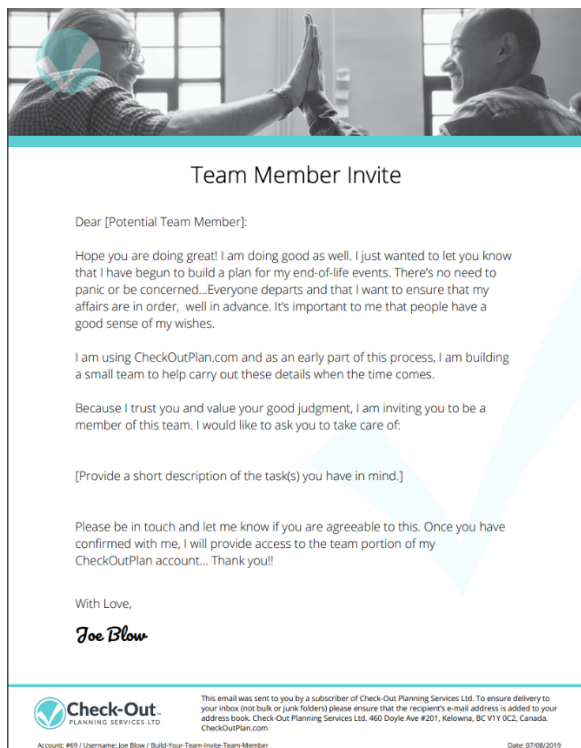
Team Member Invitation Letter View mode.

Adding a Team Member/Providing Access:

Once your invitee agrees to be part of the Team, you can provide access for them or add them to your CheckOutPlan. This means that this person will now be able to view all forms that you have opted to share (click Add to My CheckOutPlan + Save/Update buttons.) Providing access to Team Members is easily done:

1. Go to Team Dashboard in the "Build Your Team" section (or from the sidebar).

2. Fill out information for the new Team Member.

3. If this person is a Team Leader, indicate by selecting Yes under Team Leader?

When you click Send Access to Team Member an email is sent to the Team Member with their username, password and link to the My CheckOutPlan page.

Team Members can only access your CheckOutPlan documents using the password you have provided.

Add Team Members by filling out information on this screen.

Use the Send Access to Team Member and a Welcome email will be sent with the username and password. The new Team Member will then be automatically added to the Team Dashboard below.

Note: Add Team Members can also be accessed from the sidebar menu in Your Office.

Sample of the email that is sent to new Team Members.

Team Dashboard: Managing Your Team

Adding, deleting and editing Team information is done through the Team Dashboard located in the "Build Your Team" section.

Team **Dashboard**

View your list of confirmed team members. Use the Team Dashboard to remove a team member or edit their information as needed. It is helpful for all to keep team statuses up to date.

> **!** **TIP:** Confirm with each team member that its OK to share their contact information with the rest of the team, shown here.

Team Member	First Name	Email	Status	Team Leader
Jan Blow Edit | Delete	Jan	jan.blow@email.com	Approved	
Joe Blowss Edit | Delete	Joe	joe.blow@email.com	Approved	
Sally Blow Edit | Delete	Sally	sally.blow@email.com	Approved	

View and manage your Team at a glance with the Team Dashboard.

Editing/Deleting Team Members can be easily done by clicking on the Edit|Delete buttons under their names and following the prompts.

Managing Helpers Who Help

Use a CheckOutPlan Letter to send an invite to Helpers. These are people who have agreed to support your Team Members when the time comes. They do not have access to your plan but have indicated that they are willing to help.

You can send one letter to all Helpers or you can send individual letters to individual Helpers, but remember that when you write additional letters, the new letter will save over the previous letter you may have written.

If you wish to save a copy of each letter that you write, just download one letter before starting the next one.

Once you have added them, the list of Confirmed Helpers can be viewed as a list, complete with notes, below the Team Dashboard.

How the Team Sees Your CheckOutPlan:

Their sidebar is different and designed to serve the needs of Team Members. CheckOutPlan, located in the sidebar, is both the plan you have created as well as the plan that your Team Members see when they log in. While they won't be able to make any changes, Team Members with account access will be able to view, download and print your forms. (Note: They can only see a form once you have selected Add to My CheckOutPlan. They will also be able to see the status of forms within your plan, but can only view them as described above.

Sample of My CheckOutPlan dashboard as seen by Team Members.

Instructions for Team Members

Team Members can also review the information below when they view your CheckOutPlan and click on the *Important Information for Team Members tab*.
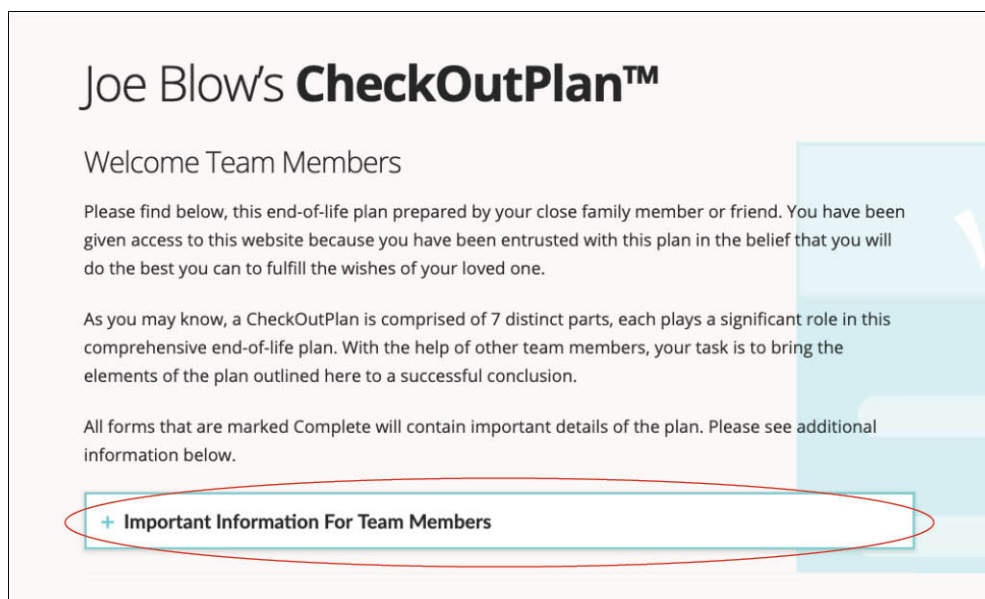
Important Information for Team Member's screen in My CheckOutPlan.

Content from Team Duties and Responsibilities:

Team Members can also visit the Team Support page for an outline on Code of Ethics and Team Responsibilities and Rewards.

Team Downloads

Sections such as "The Big Event," "Making Memories," and "Celebrate Your Life" typically contain downloadable files pertaining to that part of the plan. They are usually for reference or a source file to be used such as a key photo to be used at the Celebration of Life or Memorial Service. Downloads, if available, are located at the bottom of each section.

Helpers

Your loved one may have assigned Helpers Who Help as well as Team Members. These are people who can be called upon to help, but who do not have access to the CheckOutPlan.

User and Team Privacy
Do not share your Check-Out account access with anyone unless directed by the subscriber of this Check-Out account. Respect the privacy of your Team Members by checking with them first before sharing their name or contact information.

Private Account Access
Only the account holder's Executor or Team Leader typically hold password access to private accounts.

* Not Completed *
When sections of a form remain blank, the lack of information can be confusing for the Team. The phrase ** Not Completed ** will appear if the account subscriber has not completed a section. Whenever a field or section does not apply to the subscriber, they are requested to add "N/A" or "Not Applicable" to avoid confusion.

Locked Versus Unlocked Forms
Forms that have content that needs to be copied to complete a task such as The Event Program or Eulogy are unlocked, meaning the content can be copied and pasted from the PDF file. All other forms are locked, meaning the content cannot be copied, thereby protecting your loved one's original intentions.

Keeping Files Organized
We suggest that you create folders based on the action required such as *Events > Celebration of Life > Event Program.* Naming files clearly will also help whenever a file needs to be searched or shared.

Getting it Right
Review each form carefully for instructions for your loved one's wishes. As well, respect what they *don't* want. Review the "Notes" section provided on most forms for additional details the account holder may have provided.

Sharing Content
The "Making Memories" section contains stories, photos and more. Make sure you have a clear understanding of how and who you can share this content with.

Ongoing Access to CheckOutPlan
Access to this CheckOutPlan will continues as long as the account is kept in good standing. To ensure access to Check-Out, you may wish to discuss an ongoing payment method with the account holder if possible.

Help for Team Members

We're here for you! Visit the Team Support page, FAQs, the Help section or Contact Us for help as needed.

Tell Us Your Stories!

We would like to hear about your experiences about using CheckOutPlan as a guide to your loved one's wishes. Click on the Feedback button that is featured at the bottom of each page of the Website: http://www.checkoutplan.com/ or send us an email at mailto:feedback@checkoutplan.com?subject=Team Member Stories
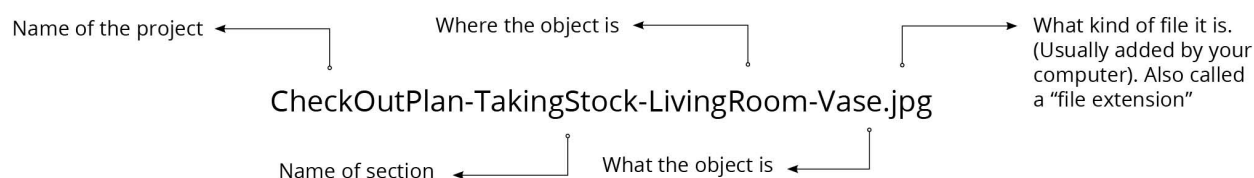
Chapter 7

File Management

The proper management of your files will support better outcomes for your CheckOutPlan and make life easier for the Team Members who will help administer your plan when the time comes. This section provides some tips on how to name files and bundle them and more.

Naming Files: Also called "naming conventions," this method of naming files will allow you and your Team to easily search and find files as needed. Having the right naming will be so much more helpful than calling a photo *Img.006.* Here is a brief overview with examples:

Original file name: Image006.jpg

Suggestion: Change the name of the file to a name with a similar structure as shown below to make them easily searchable and understood.

Updated file name (photos)

Name of the project →   Where the object is →   What kind of file it is. (Usually added by your computer). Also called a "file extension"

CheckOutPlan-TakingStock-LivingRoom-Vase.jpg

Name of section ←   What the object is ←

Updated file name (forms)

Name of the project →   Who letter is to →   What kind of file it is. (Usually added by your computer). Also called a "file extension"

CheckOutPlan-HHTInput-JoeBlow.pdf

Name of section (Having "The Talk") ←
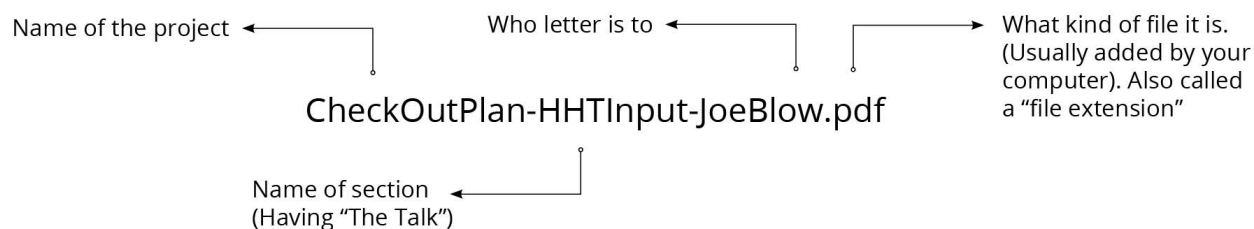
Names can be abbreviated as long as the shortened name is used consistently and can be easily understood.

How to Use Folders:

Should you decide to download your forms and store them onto your computer, taking the time to organize your folders will make it easy to locate your files later.

Here is an example of proper file storage based on the Taking Stock section:

How to Cut and Paste:

Knowing how to Cut and Paste your text is a useful skill that can speed up the process of building your CheckOutPlan. Here's how:

How to select your text:

- Hover the cursor (pointer/arrow) over the first word in the text you want to select.

- Click and drag the cursor over the text you want to select, and a highlight will appear over the selected text like this:

Blue highlight shows selected text.

To Cut and Paste text:

- Go up to the Edit menu at the top of the screen/browser window and click on Copy. This will "copy" your selected text onto the pasteboard of your computer.
- Choose Paste to place your selected text into another field.
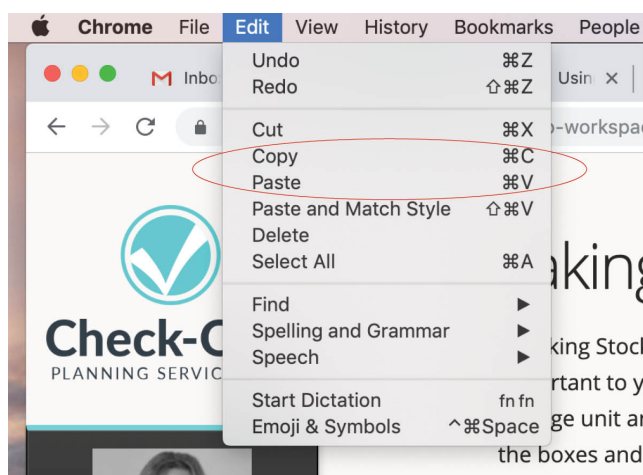
Copy and Paste shown on the Edit menu of Internet browser.

Shortcut: Use Ctrl+ C for copy and Ctrl + V for paste.

Chapter 8

Tips and Tricks

Keeping Your Forms Neat: The number of characters you can type in each field allows for nicely formatted, printable form output. If you wish to add several items in a field, use slashes (/) not the Return/Enter key when entering text into these fields. Instead, separate content using a slash (/). This way, you'll have much more space to add information into the field.

Viewing Check-Out Online: Check-Out is built to be viewed at Actual Size on your Internet browser. Text may be skewed and layout may be affected by zooming in or out.

Use "N/A" to Avoid Confusion: When a form or field doesn't apply to you, for example, if you don't have grandchildren, type "N/A" (Not Applicable). This will let your Team know that rather than having forgotten to complete a section that it didn't pertain to you or your plan. If a field is left unchanged or blank, "Not Completed" will appear in those fields of your plan.

Auto-Populated Content: When information is added that's likely to repeat, such as your address, the platform will recognize it when you type in the first few characters when re-entering it in another section (like "About You"). As long as the format of the information stays the same, the system will auto-populate those fields.

Changing Your Signature: Currently the font is set to a script style. If you wish to use the standard font, just type your name in to the signature field and it will appear in the standard CheckOutPlan font, which is called Open Sans, Regular.

Resetting a Form: You can delete the content of your form and begin again by using the following steps:

1. Uncheck the Add to my CheckOutPlan box.
2. Select Update.
3. Visit either the Review Your Progress dashboard or the Introductory page for that section and choose Delete.
4. Your form content will be deleted, and then you can begin again.

Grey Text: It is the instructional and temporary text that appears in many fields of every form. It is intended to provide guidance and support. This temporary text

disappears when you begin to type in that field, and it reappears when you delete all the content in that field.

Platform Updates

The newest updates to the Check-Out system are automatically applied when you visit the Website or log into your account. Major updates or maintenance are announced via email notices sent to Check-Out subscribers and Team Members.

In Closing

Are there topics missing from Check-Out's Help files? If so, please contact us at
http://Feedback@CheckOutPlan.com

Thank you for being an important part of the Check-Out family. Best of luck of your planning journey...and beyond!

_____

Thank You for visiting CheckOutPlan's Help Pages!

Are there topics you would like to see covered here? If so, please contact us at:
mailto:Feedback@CheckOutPlan.com?subject=Feedback from a Valued Member

CheckOutPlan.com

email: MemberSupport@CheckOutPlan.com