

# Using Westlaw Doc & Form Builder


Westlaw Doc & Form Builder makes it easy to retrieve, create, and save documents and forms for your clients. To sign on to Westlaw Doc & Form Builder, go to <http://forms.westlaw.com>.

## Searching for Documents

At the home page (Figure 1), you can use the text box at the top of the page to search for forms or to retrieve a form by citation or name. You can also browse content using the links in the *Browse* section, or access favorite or frequently used items by clicking the links in the right column.

### USING THE SEARCH TEXT BOX

To use the Search text box to search for documents, follow these steps:

1. Type terms describing your issue, or a Terms and Connectors search, in the text box at the top of any page. You can also choose a recent search by clicking the *Recent Searches* icon (  ) in the text box.
2. Leave the default jurisdiction or click the arrow to display the Jurisdiction selector. Select up to three jurisdictions and click **Save**.
3. Click **Search**.

### BROWSING FOR DOCUMENTS BY JURISDICTION OR TOPIC

In addition to searching using the text box, you can use the Browse feature to retrieve forms. Simply click the category links on the *Jurisdiction* or *Topics* tab in the *Browse* section. Click a topic heading to display its subtopics.

For assistance using Westlaw, call 1-800-WESTLAW (1-800-937-8529).

For free reference materials, visit [west.thomson.com/westlaw/guides](http://west.thomson.com/westlaw/guides).

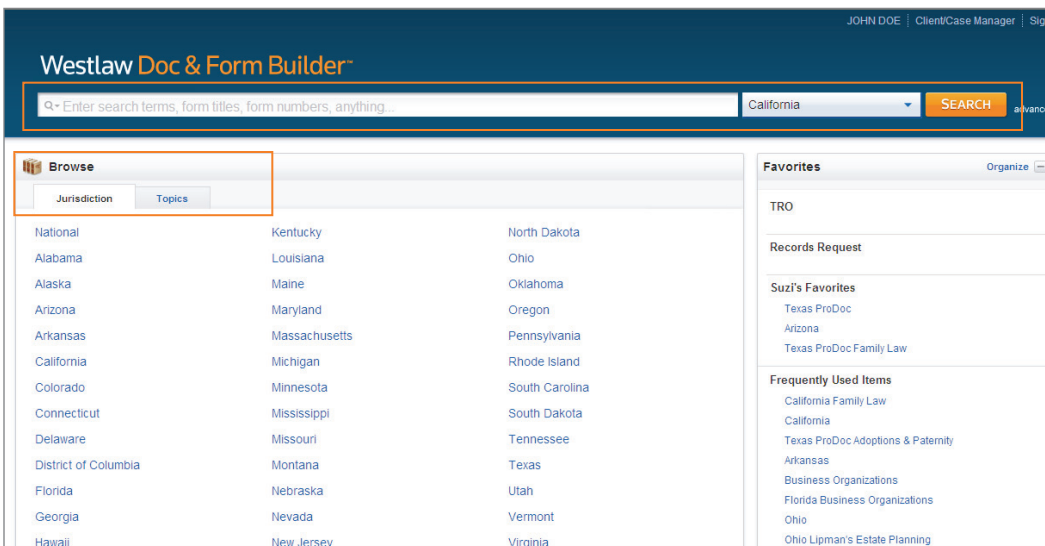


Figure 1 shows the Westlaw Doc & Form Builder home page. The page includes a search bar at the top with a text input field, a dropdown menu for jurisdiction (set to California), and a SEARCH button. Below the search bar is a 'Browse' section with two tabs: 'Jurisdiction' and 'Topics'. The 'Jurisdiction' tab is active, displaying a grid of state and national links. To the right of the 'Browse' section is a 'Favorites' section with an 'Organize' button, containing sections for 'TRO', 'Records Request', 'Suzi's Favorites', and 'Frequently Used Items'.

Figure 1. Westlaw Doc & Form Builder home page

## Viewing the Results page

After your search is run, an overview of the search result is displayed (Figure 2). Documents are displayed in groups of 20. To move to the next group of 20, click the arrows at the top or bottom of the result list. By default, documents are ranked by relevance. To change the default ranking, choose an option from the *Sort by* drop-down list at the top of the center column.

### FILTERING SEARCH RESULTS

You can narrow a search result by selecting a filter under *Narrow* in the left column. For example, the filters can include jurisdiction, document type, or source. To apply a filter, select one or more check boxes and **Apply Filters**. To undo all filters you have added, click **Undo Filters** under *Narrow*.

### SEARCHING WITHIN RESULTS

To narrow a search result by searching within the result, type your terms in the *Search within results* text box under *Narrow* in the left column and click **Search**. Both your original search terms and the terms used to narrow your result are highlighted in the documents. To undo a search within a result, click **Undo search within** in the left column.

### FORM FINDER RESULTS

When you run a search using the text box at the top of the page, the Results page includes a link to Form Finder Results in the left column. Click **Form Finder Results** to view additional forms available through Form Finder on WestlawNext.

**Note:** These forms may not be included in your subscription.

The screenshot shows the Westlaw Doc & Form Builder interface. At the top, the search bar contains 'california divorce' and the location is set to 'California'. The search results are displayed in a list format. On the left side, there are navigation and filtering options. The 'VIEW:' section shows 'Form Finder Results' with a count of 6,154. The 'NARROW:' section includes a search box for 'Search within results' and a 'Jurisdiction' filter for 'California' with a count of 1,914. Below that, a 'Volume' filter lists various legal categories with their respective counts. The main results area is titled 'Doc & Form Builder Results (2,093)' and shows a list of five items, each with a checkbox and a brief description. The items are: 1. Marriage-Divorce Verification - CDSS - AD8, 2. Affidavit of Marital Status, 3. Attorney Fee Letter Agreement, 4. New Client Letter, and 5. Petition for Orders to Stop Workplace Violence. The interface also includes a 'Sort by' dropdown menu set to 'Relevance' and a 'Build' button.

Figure 2. Results page

## Previewing a Document

To preview a document, click its title in the Results page. The form is displayed with blank fields for review, or as a scanned image of a blank document.

At the top of the document, you may see a paragraph containing explanatory text. This paragraph explains when the form may be used, includes links to relevant primary and secondary resources on WestlawNext, and provides other useful information about the form. Only part of the explanatory text may be displayed. Click **More** to display all the explanatory text in a pop-up box (Figure 4). Click **Close** to close the box.

To build a document, click **Build** at the upper-right corner of the document.

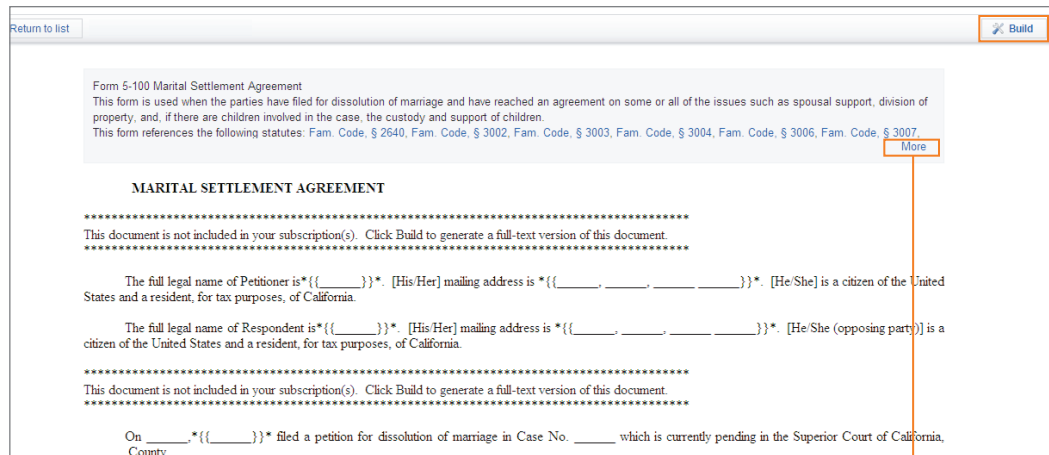


Figure 3. Previewing a text document

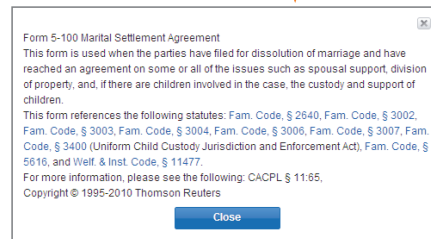


Figure 4. Explanatory text and related links for displayed document

## Building a Document

### BUILDING A PDF DOCUMENT

When you preview a PDF form, the form is displayed as a scanned image of a blank form (Figure 5). When you click **Build**, the fillable PDF is displayed (Figure 6). If there is more than one page, navigation arrows are displayed at the upper-left of the document. To complete and download the form, follow these steps:

1. Complete the text and check boxes in the displayed fillable PDF. To advance to the next blank field, press **Tab** on your keyboard. To go back to the previous blank field, press **Shift+Tab**.
2. Click **Download** in the upper-right corner of the form.
3. Click **Download** in the dialog box that is displayed.
4. To save the form without viewing it, click **Save**. In the alternative, open the form and view it before saving by clicking **Open**. Then click **File** and then **Save a Copy** in the upper-left corner to display the Save a Copy dialog box
5. Name the file, decide where you want to save it, and click **Save**.

Review of Form FL-150\* Income and Expense Declaration

Return to list Build

Form FL-150\* Income and Expense Declaration  
This Judicial Council Income and Expense Declaration form is used to provide a list of a party's income and expenses.  
\*This form was adopted for mandatory use by the Judicial Council of California.  
This form references the following statutes: Fam. Code, § 2030 - Fam. Code, § 2032, Fam. Code, § 2100 - Fam. Code, § 2113, Fam. Code, § 3562, Fam. Code, § 3620 - More

**FL-150**

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, State Bar number, and address):	<b>FOR COURT USE ONLY</b>
TELEPHONE NO.:	
E-MAIL ADDRESS (Optional):	
ATTORNEY FOR (Name):	
<b>SUPERIOR COURT OF CALIFORNIA, COUNTY OF</b>	
STREET ADDRESS:	
MAILING ADDRESS:	
CITY AND ZIP CODE:	
BRANCH NAME:	
PETITIONER/PLAINTIFF:	

Figure 5. Previewing a PDF form

Westlaw Doc & Form Builder JOHN DOE | Client/Case Manager | Sign O

FL-150\* Income and Expense Declaration  
Client: Mr. John Doe Case: Divorce

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**FL-150**

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, State Bar number, and address): John Doe	SBN:	
TELEPHONE NO.: 310-555-5555	fax:	
E-MAIL ADDRESS (Optional):		
ATTORNEY FOR (Name): John Doe		
<b>SUPERIOR COURT OF CALIFORNIA, COUNTY OF NAPA</b>		
STREET ADDRESS: 2120 Martin Luther King, Jr. Way		
MAILING ADDRESS: 2120 Martin Luther King, Jr. Way		
CITY AND ZIP CODE: Berkeley, 94704		
BRANCH NAME: Berkeley Courthouse		
PETITIONER/PLAINTIFF: JOHN DOE		
RESPONDENT/DEFENDANT:		
OTHER PARENT/CLAIMANT:		
<b>INCOME AND EXPENSE DECLARATION</b>	CASE NUMBER:	

Figure 6. Fillable PDF form

## BUILDING A TEXT DOCUMENT

When you preview a full text form, the form is displayed as text with blanks where information should be entered (see Figure 3 on page 3 of this guide). To complete the form, click **Build** in the upper-right corner. To complete the form, use the text boxes, drop-down lists, and plus signs (+) to enter the required information. Click the question mark next to a question for more information about that question (Figure 7).

### Saving a partially complete document

To save a document (it does not need to be complete), click **Save & Exit** at the top of the left column.

### Accessing a saved document

To access a document you saved, follow these steps:

1. Click **Client/Case Manager** at the upper-right corner of any page.
2. Click the name of the client to display the cases associated with that client.
3. Click the name of the case associated with the document you want to access. Documents are displayed in the right column.
4. Select the check box for the form you want to access and click **Build** in upper-right corner. Click **Continue** in the dialog box that is displayed (or select a different client or case for which to build the form). The document is displayed at the beginning, regardless of where you stopped in the build process.

The screenshot shows the Westlaw Doc & Form Builder interface for a "5-100 Marital Settlement Agreement". The client is "Mr. John Doe" and the case is "Divorce". The left sidebar contains a "Save & Exit" button and a section for "NAME, BIRTHDATE and SEX of the CHILDREN AFFECTED by this ACTION:". This section includes a "Child's Name" field with a question mark icon, a "Date of Birth" field with a question mark icon, and a "Sex" dropdown menu currently set to "Male". The main content area displays the text of the "MARITAL SETTLEMENT AGREEMENT" with various blanks for input. The text includes: "This Agreement, dated \_\_\_\_ (the 'Effective Date'), is made in connection with an action for dissolution between \*{{\_\_\_\_}}\*, referred to as 'Petitioner', and \*{{\_\_\_\_}}\*, referred to as 'Respondent', who agree as follows: The full legal name of Petitioner is \*{{\_\_\_\_}}\*. [His/Her] mailing address is \*{{\_\_\_\_, \_\_\_\_, \_\_\_\_}}\*. [He/She] is a citizen of the United States and a resident, for tax purposes, of California. The full legal name of Respondent is \*{{\_\_\_\_}}\*. [His/Her] mailing address is \*{{\_\_\_\_, \_\_\_\_, \_\_\_\_}}\*. [He/She] (opposing party) is a citizen of the United States and a resident, for tax purposes, of California. The Parties were married to each other on or about \_\_\_\_\_. For all purposes relating to the dissolution of the marriage, the date of separation is \_\_\_\_\_. The period of time between marriage and separation is \_\_\_\_ years and \_\_\_\_ months. The Court acquired jurisdiction over Respondent on \_\_\_\_\_. On \_\_\_\_\_, \*{{\_\_\_\_}}\* filed a petition for dissolution of marriage in Case No. \_\_\_\_\_ which is currently pending in the Superior Court of California, \_\_\_\_\_ County. The Parties acknowledge that irreconcilable differences have arisen between the Parties, that there is an irremediable breakdown of the marriage, and there is no reasonable hope of reconciliation. \*{{\_\_\_\_}}\* The following child[ren] involved in this action [has have] been born to or adopted by the Parties during the marriage: Name[s] of Child[ren] Birthdate Sex \*{{\_\_\_\_}}". The bottom of the interface shows a navigation bar with "Preferences", "My Contacts", "Help", and "Sign Off" buttons, and a footer with "Westlaw Doc & Form Builder. © 2011 Thomson Reuters | Privacy | Contact Us | 1-800-REF-ATTY (1-800-733-2889) | Improve Westlaw Doc & Form Builder" and the Thomson Reuters logo.

Figure 7. Building a text document

## Using the Client/Case Manager

The Client/Case Manager (Figure 8) helps you to organize clients and cases, share your work with others in your firm, and view documents in progress or completed documents. To access the Client/Case Manager, click **Client/Case Manager** at the upper-right corner of any page.

## Creating, Editing, Sharing, Closing, and Deleting Clients or Cases

### CREATING A NEW CLIENT OR CASE

You can create a client or case in three ways.

#### From the Client/Case Manager

To create a new client or case using the Client/Case Manager, access the Case/Client Manager and click **New** at the top of the left column. Complete the text boxes. To save the client or case, click **Save**. To save the client and immediately add a case for that client, click **Save & Add Case**.

The screenshot displays the Westlaw Doc & Form Builder interface. At the top, there is a search bar and a dropdown menu set to 'California'. The main area is titled 'Suzi's Clients' and shows a list of clients: 'Doe, John' and 'Magill, Suzi'. A 'New' button is highlighted in the top left corner. An 'Add New Client' form is open, featuring the following fields: 'Client Status' (radio buttons for 'Individual' and 'Business Entity'), 'Prefix', 'First Name', 'Middle Name', 'Last Name (Required)', 'Suffix', 'Address', 'City', 'State', 'ZIP', and 'Client Number'. At the bottom of the form are three buttons: 'Save', 'Save & Add Case', and 'Cancel'. The footer of the page includes 'Westlaw Doc & Form Builder. © 2011 Thomson Reuters' and the Thomson Reuters logo.

Figure 8. Creating a new client using the Client/Case Manager

## From a Result List or a Document

To create a new client or case from a result list or a document, follow these steps:

1. In a result list, select the check box of the form you want to build, then click **Build** at the upper-right of the list (Figure 9). From a document you are previewing, click **Build** in the upper-right corner of the document.
2. In the dialog box that is displayed, click **New Client** or **New Case**.
3. Complete the text boxes.
4. To save the client or case, click **Save**. To save a client and immediately add a case for that client, click **Save & Add Case**.

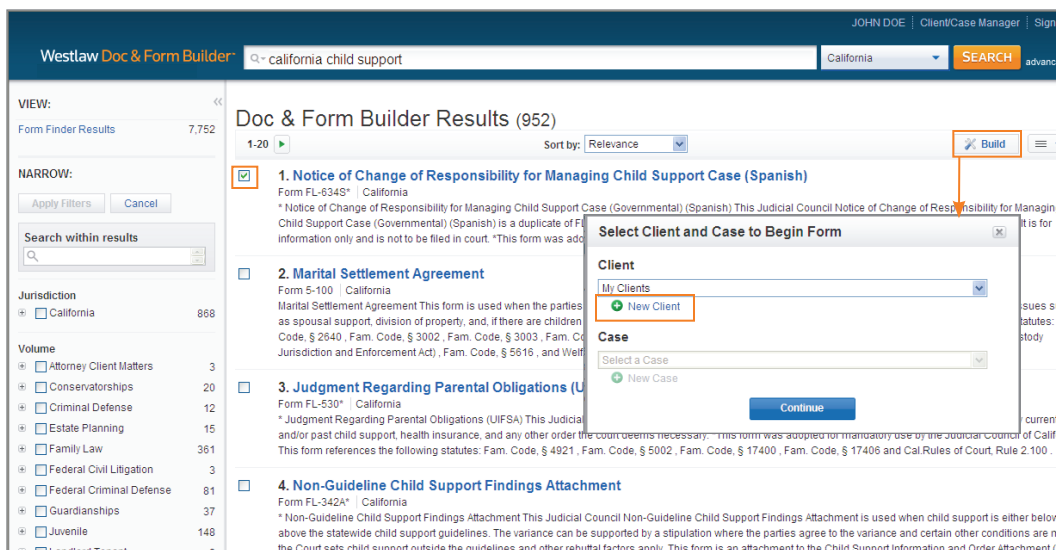


Figure 9. Creating a new client or case from a result list

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### EDITING CLIENT OR CASE INFORMATION

To edit client or case information, access the Client/Case Manager and click the name of the client or case in the left column. Click **Options** at the top of the list and select **Edit** from the drop-down list that is displayed. Or click **Edit** next to the client or case name in the right column.

### CLOSING CLIENTS OR CASES

When you have completed work on a client or case, you can add the case to a list of closed clients or cases for that client. To close a client or case, access the Client/Case Manager and follow these steps:

1. Click the name of the client or case in the left column.
2. Click **Options** at the top of the list.
3. Select **Close** from the drop-down list that is displayed.

To reopen a client or case, click its name under *Closed Cases* in the left column. Click **Options** at the top of the list and select **Reopen** from the drop-down list that is displayed.

### DELETING CLIENTS OR CASES

To delete a client or case, access the Client/Case Manager and click its name in the left column. Then click **Options** at the top of the list. Select **Delete** from the drop-down list that is displayed.

### SHARING CLIENTS OR CASES

To share a case with a colleague, follow these steps:

1. Click the name of the client or case in the left column.
2. Click **Options** at the top of the list.
3. Select **Share** from the drop-down list that is displayed.
4. In the dialog box that is displayed, type the name of the person or group in the text box. Or click **Contacts** in the upper-right corner to display a list of people and groups. Click the name of the individuals or groups you want to add (a green check mark will appear beside their name when they are selected) and then click **Insert Contacts**.
5. Click **Continue**. A list of groups or individuals who have sharing permission for that case is displayed. To remove sharing permission for an individual or group, click the **X** icon next to the name.
6. To share the case with the selected individuals or groups, click **Share**.