**Lexis and Westlaw for Finding Forms  
Professor Mika’s Transactional Drafting Class 2/6/12**

**URL for handout -** [**https://www.law.csuohio.edu/lawlibrary/ehandout/mika/wexisdrafting**](https://www.law.csuohio.edu/lawlibrary/ehandout/mika/wexisdrafting)

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| **WestlawNext**  **Search One:**  **Find a lease with an option to purchase for Ohio**  Go to the Ohio Real Property **Formfinder**:  Type in: commercial lease with purchase option   * Filter by Ohio (we get both Ohio and National forms) * Filter by Search within Results: option /3 purchase or buy   Which hit number(s) are an option to purchase form?: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  **Checklists:** Apply Checklists Filter. Look at a checklist.  (Return to List and Undo Filters)  **Statutes:** Apply the Statutes filter and open up a few results.   Note that WestlawNext also searches statutes, because statutes sometimes contain form language. |

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| **Search Two:** **Advanced Search with Title Field (WestlawNext)**  Searching just the title of a form can be useful to pinpoint the form you want, not just a document that includes your search terms somewhere in the text.  **Problem: Find a lease with an option to purchase for Ohio**  Go back to the Ohio Real Property Formfinder  **Learn About:** On the right hand side –contains background information on topics, such as Leases. Does the Learn About for Leases tell you who is the lessor and who is the lessee?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Click on **Advanced Search**   * In the Title field type: lease and purchase and option  & run the search (Preliminary field also available) * Then, Filter by Text forms   List a few hits which are leases with options to purchase? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Can also use field searches in the search boxes, eg. TI,PR( lease and purchase and option) in the original search or Search within Results. |

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| **Find a Specific Formbook on WestlawNext:**  **Find Merrick Rippner Ohio Probate Law**  Method One: Formbooks listed at bottom of form finder (does not help in this case)  Method Two: Type the name of the formbook into the all in one search box. Need to have the exact title of the book.  Method Three: Browse widget and drill down. |
| **Classic Westlaw**  **Finding Specific Formbooks**  Use the Directory OR tabs (eg. Ohio Tab) OR Search for a Database box. The tabs do not list everything but the directory does.  You do not need to know the specific name of the book/database when using Search for a Database box.  Search for Ohio Real Property Forms  It returns:  [Ohio Real Property Forms, Clauses, and Checklists](http://web2.westlaw.com/search/result.aspx?tc=1&rp=%2fsearch%2fdefault.wl&sv=Split&rs=WLW11.07&db=OH-RPFORM&tf=755&fn=_top&mt=374&vr=2.0)  [Real Property Law FormFinder - Ohio (FF-RP-OH)](http://web2.westlaw.com/search/result.aspx?tc=1&rp=%2fsearch%2fdefault.wl&sv=Split&rs=WLW11.07&db=FF-RP-OH&tf=755&fn=_top&mt=374&vr=2.0)  What is the difference? Click on the I for information  The Formfinder contains pdf fillable forms, and it costs more. Both have the search template to select topics and subtopics. |

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| **Formfinders**  [FORMFINDER](http://web2.westlaw.com/search/default.wl?rs=WLW9.08&ifm=NotSet&fn=_top&sv=Split&db=FORMFINDER&vr=2.0&rp=/search/default.wl&mt=Westlaw) - Directory>Forms>Formfinder.  Or use Search for a Database box.  [OH-FORMFINDER](http://lawschool.westlaw.com/shared/westlawRedirect.asp?url=http%3A%2F%2Fwww%2Ewestlaw%2Ecom%2Fsearch%2Fdefault%2Ewl%3Fdb%3DOH%2DFORMFINDER%26Action%3Dsearch%26RS%3DITK3%2E0%26VR%3D1%2E0&appflag=87.9) - In the Ohio tab, under Ohio Forms and KeyRules.  Or use Search for a Database box.  **Using Ohio Formfinder,** **Find a lease with an option to purchase for Ohio**  Which Topic? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Which Subtopic?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Search terms – option /3 purchase or buy   * We get both Ohio and National formbooks. * If we really want forms specific to Ohio, click on Text Forms – State Specific   **Field Searching for Title:** Can use field searching for title and preliminary, the same as in WestlawNext.   * Click on Edit Search. * Select Terms and Connectors * Field pull down menu - field for form FO() limits to the text of the form itself, excluding discussion before or after the form. |

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| **Real Estate Practitioner Tab (Classic Westlaw)**  Add a Tab in the Upper Right, Add Westlaw Tabs and add the Real Estate Practitioner tab.  Model Documents: Search transactional documents included as exhibits to SEC filings. Try a search for: option and purchase, document type=lease  Quick links to Formfinders specific to Real Property, such as  [Ohio Real Property Forms, Checklists & Clauses](http://web2.westlaw.com/search/default.wl?rs=WLW11.07&rp=%2fsearch%2fdefault.wl&vr=2.0&fn=_top&mt=374&sv=Split&db=FF-RP-OH) |

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| **Browsing Using Site Map/Table of Contents to find forms (Classic Westlaw)**  You can find a specific form book and browse the table of contents. A cost saving method, as you are not charged until you click on a document.  **Find a lease form for Ohio in the form set Ohio Forms and Transactions.**  Click on **Site Map** in the top Blue Bar  Click on **Table of Contents** in the right hand column under Find a Document  Pick State Secondary Sources and Forms  **Can you find an additional /alternate clause for a parking facility?** What section number of Ohio Forms and Transactions is it? |

**SUGGESTION:** Go to the book (database) that the form is in and look at the table of contents and the surrounding sections.

**Forms-all databases (Westlaw)** – searches all forms, does not have a template like the formfinder. Costs less money.

**LEXIS**

**New problem: Find a form for an Ohio Will with a clause saying that the beneficiary forfeits the gift if beneficiary brings a will contest.**

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| **All forms Databases**  These **compile many form sets** together and have a handy **outline** to drill down and find forms.  From the Legal Tab, Secondary Legal>Forms and Agreements  Find Ohio Transactions LexisNexis Forms   * Can you find a No contest Clause? What is the form number?\_\_\_\_\_\_\_\_\_\_\_   As far as the will itself – Wills – there is a sample will under Estates, Gifts and Trust Law>Wills>. More examples under Estates, Gifts and Trust Law>Wills>Bequests and Devises  Or could search – Estate, Gift and Trust Law>Wills  **Field Searches –** For the above compiled form sets databases there are a limited choice of fields – click on advanced to see the fields available.  If you use a specific form set you may be able to use the HEADING field, similar to title field in Westlaw. Click on the i next to the database name to see field options. |

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| **Finding a specific form set**  **Browse**– Ohio Tab>Search Analysis & CLE Materials>Estate Planning and Probate> Ohio Transaction Guide - Estate Planning Law and Forms  Look at Table of Contents or do a search  Other useful databases for wills in Ohio:   * Anderson's Ohio Elder Law Practice Manual * Couse’s * Ohio Estate Planning Checklists   **The Simple Will in Ohio** / LexisNexis, Annual. [KFO 144 .A15 S57](http://scholar.csuohio.edu/record=b1863771) (not online, but useful)  Can also use **Find a Source** - Type in: wills and forms and ohio | |
| **Findforms Box on the Right Side:**  **Search> Legal**  Select deal type, type of form and jurisdiction.  Find a form for a will with a no-contest provision. Is the Findforms box helpful in this instance? | |

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| **Total Litigator and Transactional Advisor**  **Transactional Advisor**  More (at the top)>Transactional Advisor  Real Estate>Create and Draft Documents>Real Estate Leases  Precedent Search (on the left) – searches documents filed with the SEC  **Total Litigator**  More>Total Litigator>Drafting Resources  Find a complaint to cancel a lease in Ohio.What is the form number? |

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| **LexisAdvance**  **Example One: Find a commercial lease with an option to purchase for Ohio**  **Prefilters** for Content type, jurisdiction and practice area  **Type in search:** lease and option w/5 purchase (note slightly different search syntax, although not in this particular search)  **Postfilters:**  Form Type (lease, notice, option) Source (specific formbook) |