



This guide will walk you through accessing the Forms WorkFlow website, using the Microsoft Word-integrated toolbar (including creating Profiles, locating and retrieving forms, creating Favorites, using AutoFill) and, finally, searching for forms pertinent to your litigation practice.

Forms WorkFlow Online

Accessing

Whether on the road, at home or in the office, there are several methods for accessing your firm's Forms WorkFlow website account and downloading either fillable Word or fillable PDF documents.

1. Open www.formsworkflow.com. You may need a Username and Password to log in. (Your Systems Administrator can provide the firm's Username and Password.)



Figure 1 - Website Username/Password Fields

2. If your firm has a Forms WorkFlow custom website (*IP Authentication*), you can access the site within the firm's network without a Username or Password.

Website Searching Options

- ◆ **Standard Search:** Enter a form title **Search**. Select a State or the Official Federal Forms from the drop-down menu then click **Search**.
- ◆ **Practice Group Search:** Click any of the practice group to access that practice group's form sets. For example, select the **Litigation** to access the form sets listed in Figure 2.



Figure 2 - Website Litigation Practice Group Options

- ◆ **Interactive Map Search:**
 - a. Roll the cursor over each state to preview and/or select the relevant State Jurisdiction form set; or
 - b. Select the **Federal Forms** button to search the Official Federal Forms.





Figure 3 - Forms Workflow Website Search Screen

Subscriptions: Your firm may subscribe to specific form sets (e.g., California State forms and Official Federal Forms) which allows you to download any forms contained in these sets as either fillable Word or PDF files. All other national form sets can be viewed and printed but only as non-fillable PDFs.

Using the Ribbon in Microsoft Word ®

The Forms Workflow Microsoft Word® ribbon is a web-interface to the Forms Workflow site. While you do have the ability to download fillable PDF forms from the web-integrated ribbon, more often than not, you will choose to download your forms into Word.

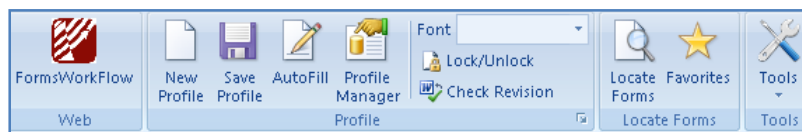


Figure 4 - 2007 Ribbon

◆ Access the Forms Workflow website directly from the ribbon by selecting ⇨



Profiles

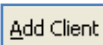
Profiles are templates of information (e.g., attorney information and vital aspects of the case or deal) used to fill forms. The ribbon organizes the Profiles in the **Profile Manager** using **Client** folders. Note: The Profile feature is not available for the fillable PDF forms.

Adding a Client folder

1. Select the **Forms Workflow** ribbon tab.



2. Select **Profile Manager** from the ribbon.



3. Click **Add Client** in the **Profile Manager** window.



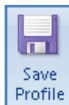
4. Enter the *Client* name and click **OK**.



Create a New Profile



1. Select **New Profile** from the ribbon.
2. From the **New Profile** checklist screen, select the applicable Profile options then click **OK**. At a minimum, you should select **Attorney**, **Court**, and **Case** Information.
3. A blank *Matter profile* will appear in Word. Fill in the applicable fields.



4. When the Profile is complete, select **Save Profile** from the ribbon if the Profile opens as a Microsoft Word file or **Save As** if the Profile form is displayed in its own window.
5. Choose the *Client* from the **Client List** that you wish to associate with the new Profile, or select **Add Client** to create a new client.
6. Enter the **Profile Name**, and click **Save**.

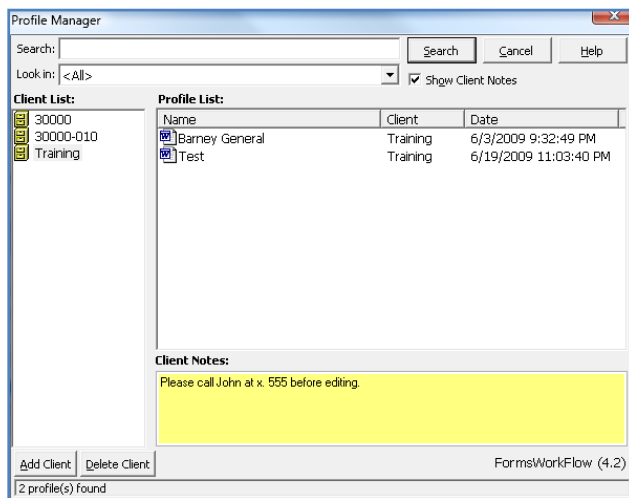


Figure 5 - Profile Manager

Searching and Downloading



Searching Hint: All you need is a few key words. Too much information may limit your results.



1. Select **Locate Forms** from the ribbon. The **Search** window will open.

Select information from the drop-down in the following fields:

2. Select the target State from the **Location** drop-down menu (*required field*).
3. **Jurisdiction:** Drop-down options are dependent on the **Location** selected. See the sample options available under “*Sample Litigation Searches*” of this document.
4. **Subcategory:** Drop-down options are dependent on the **Jurisdiction** selected. See the sample options available under “*Sample Litigation Searches*” of this document.



If the **State | Federal** set is selected, check either **Including National Bankruptcy** or **Including National District** boxes to view the Official Federal Form results with the State Federal form results.

For a more targeted search, also enter information into one or more of the following fields:

5. **Title:** Enter the title of the form or part of the title of the form. This field does not require Booleans.
6. **Form Number:** The form number must have the proper spacing and hyphens.
7. Click . The forms will display in the *Result* section.
8. Check the box next to the target form(s) (see *Figure 6*).
9. Check **AutoFill** to populate the form(s) with information from a Profile (see **AutoFill Forms** for more information).
10. Click to download the form(s) selected into Word.



Favorites

Favorites are saved links to your most commonly used forms. Once saved, the forms are accessed through the **Favorites** button. Forms can be AutoFilled from the Favorites window.

Creating Favorites

1. Search for a form or set of forms.
2. From the **Result** list, select the form(s) to be added to the list of **Favorites** by checking the box next to its name.

Name	Form Number	State
<input type="checkbox"/> Abandonment Of Appeal (Limited Civil Case)	APP-106	Californ
<input type="checkbox"/> Abandonment Of Appeal (Unlimited Civil Case)	APP-005	Californ
<input type="checkbox"/> Appellants Notice Designating Record On Appeal (Unlimit...	APP-003	Californ
<input type="checkbox"/> Application For Extension Of Time To File Brief (Civil Cas...	APP-006	Californ
<input type="checkbox"/> Attendance Sheet For Court-Program Mediation Of Civil ...	ADR-107	Californ
<input checked="" type="checkbox"/> Case Management Statement	CM-110	Californ
<input checked="" type="checkbox"/> Case Questionnaire - For Limited Civil Cases (Under \$25...	DISC-010	Californ
<input type="checkbox"/> Child Support Case Registry Form	FL-191	Californ

Figure 6 –Choose your forms by checking the box next to the form in the Search window



- Click **Add to Favorites**. The **Add Favorite** window will appear.
- Click **New Folder**.

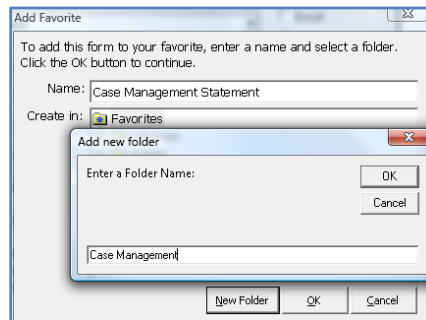


Figure 7 - Add Favorites | Add new folder windows

- From the **Add new folder** dialog, enter a folder name then click **OK**.
- The **Add Favorite** window will reappear. Click **OK** to confirm each form displayed in the name field should be added to the **Favorites** folder selected.
- The favorite(s) selected has been created. Click **Close** to dismiss the **Forms WorkFlow Search** window.



AutoFill Forms

AutoFill is the feature which associates the Forms WorkFlow-Microsoft Word Profile with the Forms WorkFlow-Microsoft Word downloaded form.

*AutoFill checkboxes are also accessible in the **Search** and **Favorites** windows.*

- Search for and download a form.
- Select **AutoFill** from the ribbon.
- From the **Select Profile** window, locate the *Client* folder containing the *Profile* to be used to **AutoFill** the form, and click once to select it.
- From the **Profile List**, double-click the appropriate **Profile**.
- The applicable information from the **Profile** selected will be used to **AutoFill** the form.

CM-010	
ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, State Bar Number, and address):	
Fred Flinstone Bar No.	
Stone, Stone and More Stone	
1234 Main Street	
Anywhere, CA 67890	
TELEPHONE NO.: (555) 555-1234	FAX NO.: (555) 555-1234
ATTORNEY FOR (Name): Bedrock, Inc.	
SUPERIOR COURT OF CALIFORNIA, COUNTY OF Los Angeles	
STREET ADDRESS: 111 N. Hill Street	
MAILING ADDRESS: 111 N. Hill Street	
CITY AND ZIP CODE: Los Angeles 90017	
BRANCH NAME: Branch	
CASE NAME: Motion	
FOR COURT USE ONLY	

Figure 8 - AutoFilled Form


Additional Editing Options

- Select **Lock/Unlock** to enable Word's formatting features. You may also spell check and perform minor adjustments to cells to accommodate extra text.



◆ **Warning: Care must be exercised when a form is unlocked. Courts will reject filings if the form is modified beyond their accepted specifications. Here are a few guidelines:**

- Form modifications must not increase the page count.
- We do not recommend editing any of the “hard text” in a form without receiving approval from the court or agency *before* filing the document.

2. Select the **Font** drop-down to change a field's font size. Select  to determine if a saved form is valid. . *Note: Check Form Revision is not compatible with forms downloaded from the Forms WorkFlow Website.*

Sample Litigation Searches

This section is intended general guideline for searching.

Location: California
Jurisdiction: Federal
Subcategory: Equal Opportunity Commission
Subcategory: USBC Central
Subcategory: USBC Eastern
Subcategory: USBC Northern
Subcategory: USBC Southern
Subcategory: USDC Central
Subcategory: USDC Eastern
Subcategory: USDC Northern
Subcategory: USDC Southern
Jurisdiction: Judicial Council
Subcategory: Adoption (13)
Subcategory: Alternative Dispute Resolution (11)
Subcategory: Appellate (20)
Subcategory: Attachment (17)
Subcategory: Case Management (7)
Subcategory: Civil (7)
Subcategory: Civil Harassment (11)
Subcategory: Claim And Delivery (10)
Subcategory: Court Records (5)
Subcategory: Criminal (38)
Subcategory: Discovery (8)
Subcategory: Domestic Violence Prevention (32)
Subcategory: Elder Or Dependent Adult Abuse (11)
Subcategory: Emergency Protective Order (1)
Subcategory: Enforcement Of Judgment (18)
Subcategory: Family Law - Dissolution - Legal Separation -
Subcategory: Family Law - Enforcement (22)
Subcategory: Family Law - Governmental (46)
Subcategory: Family Law - Interstate Actions (11)
Subcategory: Family Law - Miscellaneous (12)
Subcategory: Family Law - Motions (52)
Subcategory: Family Law - Parentage Actions (18)
Subcategory: Family Law - Summary Dissolution (5)
Subcategory: Fee Waiver (6)
Subcategory: Ignition Interlock Device (6)



Location: California
Subcategory: Indian Child Welfare Act (8)
Subcategory: Interpreter (6)
Subcategory: Judgment (1)
Subcategory: Juvenile (150)
Subcategory: Miscellaneous (64)
Subcategory: Name Change (14)
Subcategory: Pleading Contract (5)
Subcategory: Pleading General (1)
Subcategory: Pleading Personal Injury (9)
Subcategory: Probate Guardianship-Conservatorship (101)
Subcategory: Probate-Decedents Estates (36)
Subcategory: Proof Of Service (11)
Subcategory: Receiverships (4)
Subcategory: Small Claims (31)
Subcategory: Subpoena (6)
Subcategory: Summons (8)
Subcategory: Traffic Infractions (11)
Subcategory: Transitional Housing Misconduct (8)
Subcategory: Unlawful Detainer (Landlord-Tenant) (7)
Subcategory: Wage Garnishment (17)
Subcategory: Workplace Violence (7)

*Number of forms available in the module is indicated in ().



Official Federal Forms

Note: Not all State Federal Courts use all the Official Federal Forms. It is recommended you execute a **State | Federal** search then check either **Including National Bankruptcy** or **Including National District** boxes to view the Official Federal Form results in tandem with the State Federal form results.



denotes an Official Federal Form.

The screenshot shows the FormsWorkFlow (4.2) search window. The search criteria are: Location: Official Federal Forms; Jurisdiction: Circuit Court Of Appeals; Subcategory: 9th Circuit Court Of Appeals. The search results list several forms, including 'Acknowledgement Of Hearing Notice' for Pasadena, Portland, San Francisco, and Seattle, as well as 'Administrative Agency Case Management Checklist', 'Application And Oath For Admission', and 'Application For Leave To File Second Or Successive Petition' (FORM 12). The status bar at the bottom indicates '36 form(s) found'.

Figure 9 – Official Federal Forms Sample Search

Searching

1. **Location** (required): Select **Official Federal Forms**.
2. **Jurisdiction**: Choose any option listed under the “Selected Litigation Official Federal Form Sets.” In Figure 9, **9th Circuit Court of Appeals** is selected.
3. **Subcategory**: Choose any option listed under the “Selected Litigation Official Federal Form Sets”.
4. For a more targeted search, also enter information into either or both of the *Title* or *Form Number* fields.
5. To use additional Forms WorkFlow features, see the *Profiles*, *Favorites* and *AutoFill* sections of this guide.



Searching Hint: All you need is a few key words. Too much information may limit your results.

Selected Litigation Official Federal Form Sets

Location: Official Federal Forms

Jurisdiction: American Arbitration Association (27)

Jurisdiction: Bankruptcy

Subcategory: General (64)



Location: Official Federal Forms
Subcategory: Procedural Forms (50)
Jurisdiction: Circuit Court Of Appeals
Subcategory: 1st-11th Circuit Court Of Appeals (273)
Subcategory: DC Circuit Court Of Appeals (28)
Jurisdiction: Criminal Justice Act (CJA) (18)
Jurisdiction: Federal District
Subcategory: Administrative Office – Civil (39)
Subcategory: Administrative Office – Criminal (49)
Subcategory: Miscellaneous (12)
Subcategory: National Records and Archives (38)
Jurisdiction: US Court Of Appeals - Federal Circuit (27)
Jurisdiction: US Department Of Justice (21)
Jurisdiction: US Department Of State
Subcategory: Directorate Of Defense Trade Controls (1)
Subcategory: Passport (12)
Subcategory: Visa (11)
Jurisdiction: US Dept Of Justice
Subcategory: Civil Division (4)
Subcategory: Executive Office For Immigration Review (14)
Subcategory: US Marshalls Office (3)
Jurisdiction: US Dept Of Labor (151)
Jurisdiction: US Tax Court (19)

*Number of forms available in the module is indicated in ().

Jury Instructions

Forms WorkFlow has the Jury Instruction sets for **California** (Civil & Family), **Florida** (Civil & Criminal) and **Illinois** (Civil & Criminal) available under the **Tools** button. The instructions below detail the California Jury Instructions process, but the same concepts also apply to the Florida and Illinois Jury Instructions.



Figure 9 - Accessing Jury Instructions from the Forms WorkFlow ribbon

Create a New Jury Instruction

1. Select **Tools** | **California Jury Instructions** from the **Tools** drop-down (see *Figure 9 - Accessing Jury Instructions from the Forms WorkFlow ribbon*) to open the **Jury Instructions Insert** window.

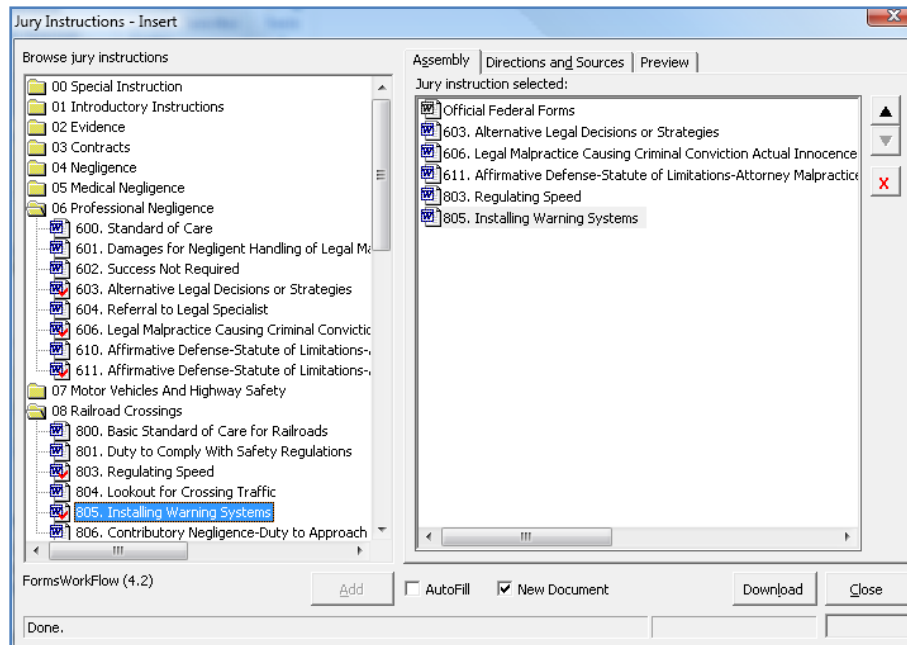






Figure 10 – Selecting Jury Instructions

2. Double-click a category folder to expand the jury instructions list.
3. Double-click (or highlight then click ) a jury instruction to add it to the **Assembly** tab.
4. Repeat Steps 2 and 3 above to continue building the jury instruction document.
5. Click  to download the selected jury instructions into an MS Word file.


Arrange/Delete Jury Instructions

Prior to download, jury instructions can be rearranged and deleted within the **Assembly** tab.

Rearrange Jury Instructions

1. Highlight the jury instruction to be moved in the **Assembly** tab.
2. Click  to move the selected instruction up in the list.
3. Click  to move the selected instruction down in the list.

Delete Jury Instructions

1. Highlight the jury instruction to be deleted in the **Assembly** tab.
2. Click  to delete the selected instruction.

View Jury Instructions Directions and Sources Tab

1. Click the **Directions and Sources** tab.
2. Select a jury instruction. The *Directions for Use* and *Sources and Authority* for the selected instruction will display.




Preview Jury Instructions

1. Click the **Preview** tab.



2. Select a jury instruction. The text of the selected instruction will display in the **Preview** tab.

Adding Jury Instructions

1. Open an existing jury instruction document.
2. Select **Tools** menu | **California Jury Instructions** from the ribbon to access the **Jury Instructions Insert** window.
3. To add additional instructions to the document, double-click the jury instruction(s) to insert it into the **Assembly** tab.
4. Use  and  to change the order of the added jury instructions.
5. Uncheck the **New Document** box.
6. Click  to download the additional instructions to the existing jury instruction document.



Existing jury instructions cannot be rearranged or deleted from within the Assembly tab. Use the Jury Instruction Ribbon to rearrange or delete existing instructions.

Tip: In the Assembly pane, the document icon that represents the jury instruction is gray for existing instructions and in color for added instructions.

Using the Jury Instructions Ribbon



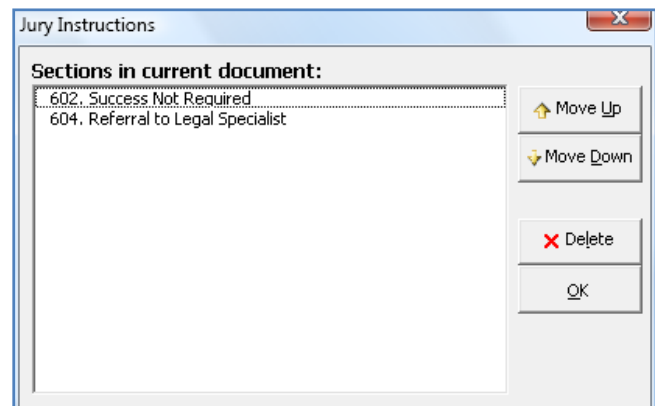
Figure 11 – CACI Jury Instructions Ribbon

Arrange/Delete

Arrange/Delete allows you to rearrange or delete jury instructions.

1. Click **Arrange/Delete** on the *Jury Instructions* ribbon. Word will switch to outline view, and the **Jury Instructions** window will appear.
2. Select the instruction to be moved or deleted.
3. To move the instruction, click the **Move Up** or **Move Down** buttons. To delete an instruction, click the **Delete** button.
4. Click **OK** to confirm the changes and to return to the normal view.

Figure 12 - Arrange/Delete



Remove Table

Remove Table removes all occurrences of the history table from the entire jury instruction document.

1. Click **Remove Table** on the *Jury Instructions* ribbon.
2. Click **Yes** to confirm deletion.



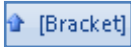

Update Checkbox

Update Checkbox copies the checkbox information from the history table on the first page of the jury instruction document to the history table on all pages of the document.

1. Check the applicable box in the history table on the first page of the jury instruction document.
2. Click **Update Checkbox** on the *Jury Instructions* ribbon.
3. Click **OK** to duplicate the checkmark in all other history tables in the document.

Bracket Navigation

Bracket navigation allows you to move between the fillable fields in a jury instruction document.

1. To move to the previous fillable field, click .
2. To move to the next fillable field, click .

Replace Bracket

Replace Bracket allows you to replace all instances of a fillable field (bracketed text) with specified text.

1. Select the item by clicking a fillable field (bracketed text) once.
2. Click **Replace [Bracket]** on the *Jury Instructions* ribbon. The **Find and Replace** window will display.
3. Enter the appropriate information in the **Replace with** field to replace the text in the **Find what** field.
4. Click the **Replace** button to replace the text in the selected field only, or click the **Replace All** button to replace all like bracketed fields throughout the document.

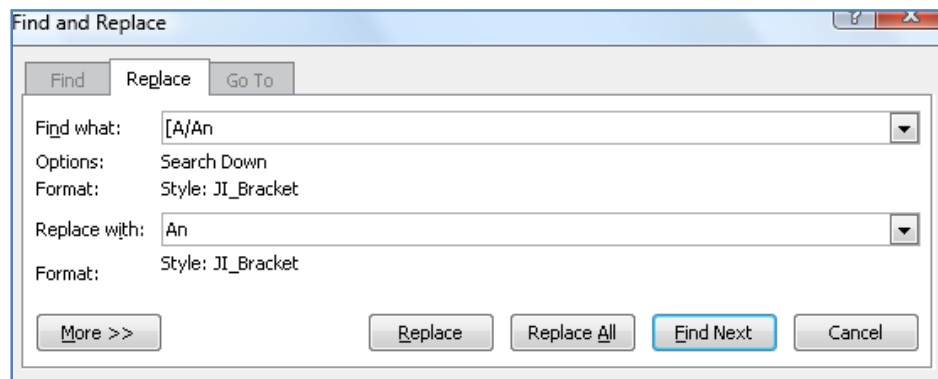
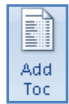


Figure 13 - Replacing bracketed fields



Add TOC



creates a table of contents page based on the jury instructions in the document.

1. Click the **Add TOC** button on the *Jury Instructions* ribbon.
2. A table of contents page will be inserted at the beginning of the jury instructions document.

California Interrogatories Response Generator

The California Interrogatories Response Generator adds text from California Judicial Council Form Interrogatories – General (DISC-001) and corresponding response fields into an existing or new pleading.

If using an existing pleading, place the cursor at the insertion point in the document before downloading the interrogatories



Figure 14 – Open the **California Interrogatories Response Generator** from the Forms WorkFlow ribbon **Tools** button

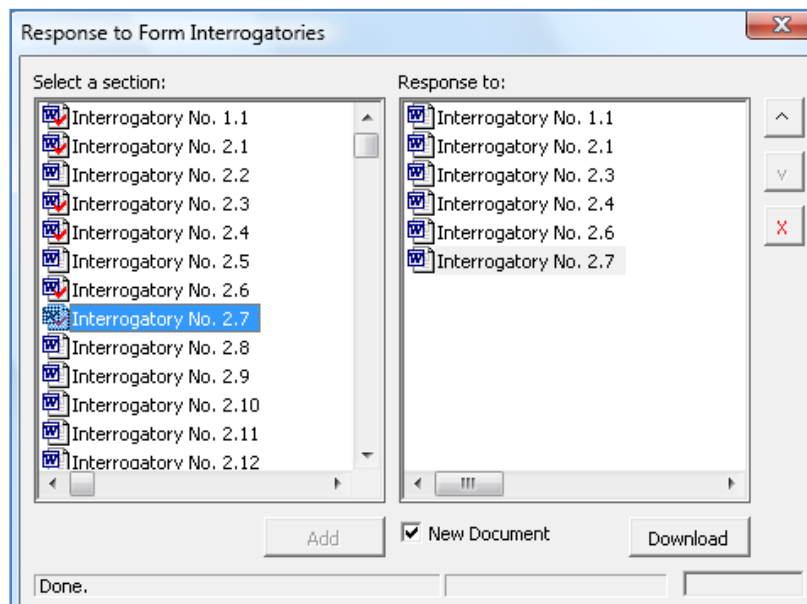


Figure 15 - Add the target interrogatories to the **Response to** pane. Uncheck **New Document** to add the interrogatory/reponses to an open pleading caption. Click **Download**.



16 ¶ **INTERROGATORY NO. 1.1:** ¶

17 ¶ State the name, ADDRESS, telephone number, and relationship to you of each PERSON

18 ¶ who prepared or assisted in the preparation of the responses to these interrogatories. *(Do not identify*

19 ¶ *anyone who simply typed or reproduced the responses.)* ¶

20 ¶ **RESPONSE TO INTERROGATORY NO. 1.1:** ¶

21 ¶ Enter Response Here. ¶

22 ¶ **INTERROGATORY NO. 2.1:** ¶

23 ¶ State. ¶

24 ¶ (a) → your name. ¶

25 ¶ (b) → every name you have used in the past; and ¶

26 ¶ (c) → the dates you used each name. ¶


27 ¶ **RESPONSE TO INTERROGATORY NO. 2.1:** ¶

28 ¶ Enter Response Here. ¶

Figure 16 - Add the responses to the Enter Response Here field.

Requesting Forms

Can't find a form?

- Click  **Suggest a Form** on your firm's website **Home** page then complete the **Request a Form** information; or
- E-mail a PDF copy of the form to: formrequest@americanlegalnet.com