

WESTLAW FORM BUILDER

Getting started with Westlaw Form Builder

Manually filling in forms is time-consuming, tedious, and can cause errors you often don't catch until it's too late. Westlaw Form Builder™ is a better, more accurate way to create forms. Westlaw Form Builder is an online legal document assembly tool, providing templates, organization, and automated content management. Westlaw Form Builder can be accessed from any desktop or laptop computer, tablet, or smartphone.

Accessing Westlaw Form Builder

Go to www.forms.westlaw.com to sign on with your OnePass username and password.

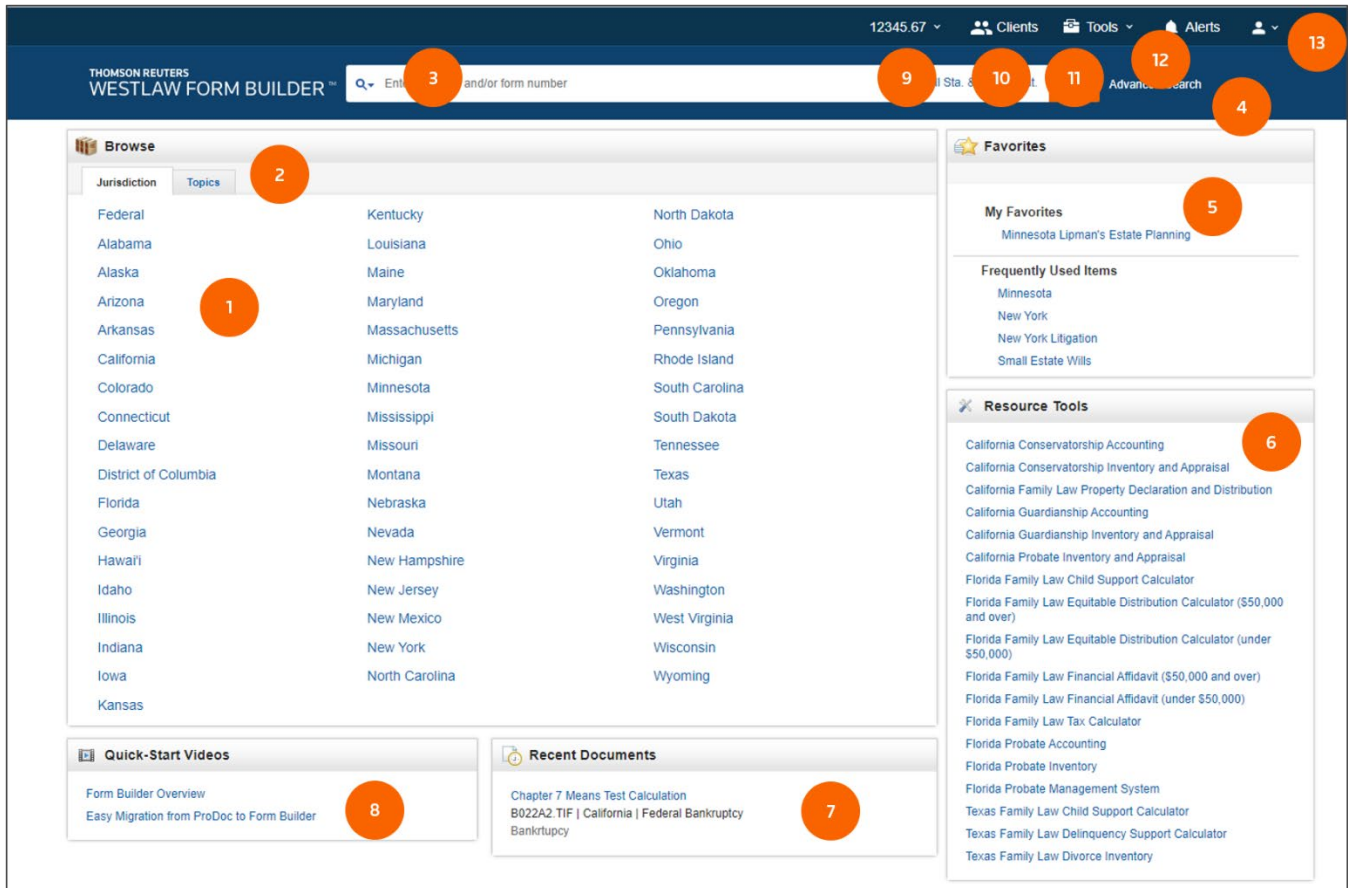
NOTE: *Westlaw Form Builder also has access points in Westlaw and Firm Central.*

Westlaw Form Builder Homepage

There are several ways to access content and tools on Westlaw Form Builder.

1. Look for forms by **Jurisdiction**.
2. Look for forms by **Topic**.
3. Enter a form title or form number in the **Search** bar.
4. **Advanced Search** provides you a template to create a Boolean Terms & Connectors search.
5. When you are browsing for forms, you can easily add collections of forms to **My Favorites**.
6. The **Resource Tools** widget contains many different calculators and supplemental tools that will help you to complete specific forms.
7. The **Recent Documents** widget displays recent forms you have been working on, regardless of whether they are finished or not. The Recent Documents pane displays the details for the form and the matter you built the form for, if any.
8. The **Quick-Start Videos** widget displays links to various help videos for Form Builder, including Form Builder Overview and Custom Forms.
9. A **Client ID**, or client identifier, helps to identify the client for whom you are performing research. For example, you can identify the session by client name and/or matter number. If you are not working on a specific client or matter, you can enter any other identifier to help you identify the session.
10. **Clients** helps you organize your clients and matters, share your work with others in your firm, company or organization, and view in-progress or completed documents.
11. **Tools** includes several resources:
 - **Forms Sets** are a collection of forms that are built together. If you find yourself building the same forms together multiple times, putting them into a form set will save you from having to search for them every time you need to use them.
 - **Default Answers** enable you to save sets of answers which you can create and apply across forms you assemble in Form Builder. They can save you time if you find yourself answering the same questions in the same way across multiple forms, by pre-populating those questions with answers you have already provided.
 - **Certified Mailer** feature makes it easy to print labels for certified mail. Certified Mailer conforms to United States Postal Service certified mail requirements when you print on the updated Walz certified mailer labels.

- 12. Alerts are notifications that are set on individual forms. When these alerts are activated, it means there has been a change in the form’s format or language that is substantial and may affect the legal sufficiency of the form.
- 13. Your Profile includes links to Preferences (you can change some generic aspects of the application such as time zone and formatting), Help, and Sign Off.



Looking for more information?

Visit legal.solutions.com/formbuilder