



WESTLAW ELDER PRACTITIONER RESEARCH GUIDE

DECEMBER 2009



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About This Guide

In this guide, the graphics and step-by-step instructions are based on accessing Westlaw via the Internet. Because of the evolving nature of Internet technology, there may be recent changes to the Westlaw interface and functionality that are not reflected in this documentation.

Information in this guide is current through December 1, 2009.

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West

610 Opperman Drive

Eagan, MN 55123-1396

Printed in the United States of America

1 Introduction

Welcome to Westlaw Elder Practitioner

Comprehensive and well-organized materials help you provide expert representation to your clients. Westlaw Elder Practitioner provides you with all of your practice resources in a single location so you can access them quickly and efficiently.

This quick reference guide will assist you in using these materials as you handle issues such as the following:

- identifying your client
- evaluating the health needs of your client
- establishing guardianship and conservatorship
- evaluating pension and retirement benefits
- identifying the housing needs of your client

Because estate planning topics are closely related to working with the elderly client, the Elder Practitioner page includes public records containing information about assets and people and tax materials.

Selecting the Tabbed Elder Practitioner Page

When you access Westlaw, you can select a tabbed page customized for elder law research. The tabbed Elder Practitioner page places resources and search options within easy reach to help you quickly access the materials you need. To add the Elder Practitioner page, follow these steps:

1. Click **Add a Tab** at the top of any page. At the next page, click **Add Westlaw Tabs** to display a list of available tabbed pages.
2. Select the check box next to *Elder Practitioner* under *Topical* and then click **Add to My Tab Set**.
3. A list of the pages you've selected is displayed under *In Tab Display*. One page is designated as your default page (the page that is displayed when you sign on to Westlaw). Click **Set as Default** next to *Elder Practitioner* to set this page as your default.
4. To display the Elder Practitioner page, click its tab (Figure 1).

The Elder Practitioner page allows you to add materials for up to three jurisdictions. To add materials for a specific jurisdiction, click **Edit** in the left or right frame.

Elder Practitioner Page Overview

The left frame provides quick access to common research tasks. The right frame allows you to easily access resources in the following areas:

- State Primary Sources
- Elder Essentials
- Elder Essentials–Forms, Checklists, and Clauses
- Elder Housing
- Elder Health Resources
- Federal Elder Primary Sources
- Pensions and Retirement
- Guardianship and Conservatorship
- Court Documents
- Jury Verdicts
- Asset and People Information
- Tax Materials

The screenshot shows the Westlaw Elder Practitioner page. At the top, there is a navigation bar with links for FIND&PRINT, KEYCITE, DIRECTORY, KEY NUMBERS, COURT DOCS, FORMFINDER, SITE MAP, HELP, and SIGN OFF. Below this, the page is organized into several sections:

- Shortcuts:** Includes Andrews Litigation Reporters, Current Awareness (with a dropdown menu and Go button), Andrews Express, Search (with links for Court Documents and Litigation Reporters), Recent Developments (with a link for Estate Planning Updates), Find by citation (with a search box and Go button), KeyCite this citation (with a search box and Go button), Finding Tools (with links for Find a Case by Party Name, Find a Person, Find a Company, and Find a Database), Search for a database (with a search box and Go button), Case Evaluator (with links for Create Report and What is Case Evaluator?), and Related Westlaw Tabs (with links for Estate Planning Practitioner and Tax).
- Resources:** Includes Prove Your Case (with a link for AmJur Proof of Facts), State Primary Sources (with links for Ohio Statutes Annotated, Ohio Administrative Code, Ohio Cases - All, Medicare/Medicaid (Health Law) Cases -Ohio, Ohio Court Rules, and All State Cases), Elder Essentials (with links for Advising the Elderly Client, Academy of Elder Law Attorneys (NAELA) Materials, Elderlaw: Advocacy for the Aging, Elder Law Journal, Elder Law Advisory, Marquette's Elder Advisor, Representing the Elderly or Disabled Client (Prem. Cont.), and Advising the Elderly or Disabled Client (Prem. Cont.)), and Elder Essentials - Forms, Checklists & Clauses (with a description of the resources and links for OHIO and NATIONAL categories).
- Right-hand Column:** Includes Federal Elder Primary Sources (with links for Elderly Housing - Federal Statutes, Federal Government Benefits, Federal Health Law, Federal Pension & Retirement Benefits, and Federal Veterans' Law), Pensions & Retirement (with links for Advising the Elderly Client - Pensions and Retirement, Social Security Materials, and Federal Pension and Retirement Benefits - News Releases), Guardianship & Conservatorship (with links for Advising the Elderly Client - Guardianship and Conservatorship, Incapacity, Powers of Attorney and Adoption in Connecticut - Elder Law, Florida Guardianship Law and Procedure - Elder Law, Georgia Guardian and Ward, Elder Law and Guardianship in New York, and Additional Materials...), Court Documents (with links for All State and Federal Briefs, All State and Federal Trial Filings, Expert Witness Filings, Civil Jury Instruction Filings, and State Trial Court Orders), Jury Verdicts (with a link for All Jury Verdicts), and Asset & People Information (with a link for PeopleMap).

Figure 1. Elder Practitioner page

