Customer Service

Technical and Search Assistance (available 24 hours a day)
If you have general or technical questions about WestCheck, call Customer Technical Support at 1-800-WESTLAW (1-800-937-8529) or email west.support@thomsonreuters.com.

If you have search questions about a Thomson Reuters legal product, call the Reference Attorneys at 1-800-REF-ATTY (1-800-733-2889) or email west.referenceattorneys@thomson.com.

Accessibility Support
For information on the Thomson Reuters accessibility policy, go to legalsolutions.thomsonreuters.com/accessibility.

Billing and Account Assistance
For billing and account assistance, call Customer Service at 1-800-328-4880 or email customerservice@thomsonreuters.com. Billing and account assistance is also available online at legalsolutions.thomsonreuters.com/support.

Training
For information about Web-based training, telephone training, or in-person training, go to legalsolutions.thomsonreuters.com/training.

Reference Materials
For free reference materials, go to legalsolutions.thomsonreuters.com/guides. Thomson Reuters products also contain online Help.
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1 Introduction to WestCheck

WestCheck is automated citation-checking software that verifies the status of citations in your legal document or in a citations list you create manually. With WestCheck you can

• check the status of your citations in KeyCite
• create a Cited Decisions list of cases cited by your case
• use QuoteRight to verify the accuracy of quotations in your document
• use the Find service to retrieve the documents

WestCheck is available in three versions:

• Integrated software in Microsoft Word and Corel WordPerfect
• Stand-alone software
• Online at westcheck.com

This guide explains how to use the integrated software version, in which products and features are launched from within Microsoft Word or Corel WordPerfect using the Westlaw Solutions framework.

This guide explains how to use the integrated software version and the stand-alone software version. In the integrated software version, products and features are launched from within Microsoft Word or Corel WordPerfect using the Westlaw Solutions framework.

Downloading WestCheck

WestCheck software is packaged with Drafting Assistant and can be downloaded at info.legalsolutions.thomsonreuters.com/software/westlaw-drafting-assistant.

Services Available in WestCheck

KEYCITE

KeyCite is our comprehensive, current, and accurate citation research service. KeyCite provides information such as

• direct appellate history of cases and administrative decisions
• negative citing references for cases and administrative decisions
• citations to cases, administrative decisions, secondary sources, and briefs and other court documents that have cited a case, statute, administrative decision, or regulation
• complete integration with the West Key Number System so you can track legal issues discussed in a case
• citations to session laws or rules amending or repealing a statute or regulation
• citations to proposed legislation affecting a federal or state statute

KeyCite covers every case in the National Reporter System, as well as more than 1 million unpublished cases. KeyCite information is also available for federal and state statutes and regulations; administrative decisions from selected states; patents issued by the U.S. Patent and Trademark Office; American Law Reports (ALR) annotations; articles from hundreds of law reviews; and administrative decisions of selected federal agencies. In addition, KeyCite provides citing references from numerous texts and treatises.
CITED DECISIONS

While KeyCite lists cases citing your case, the Cited Decisions service lists the cases cited by your case. Cited Decisions is also available for ALR annotations, law review articles, and selected administrative decisions.

Cited Decisions is a useful tool for finding hidden weaknesses in a case because it shows whether the cases on which your case relies have significant negative history. The Cited Decisions result allows you to determine at a glance which cited cases merit investigation.

- Cited cases are marked with KeyCite status flags, which indicate whether the cases have history or citing references available in KeyCite.
- Each cited case is marked with depth of treatment stars that indicate the extent to which the citing case discusses the cited case.
- Quotation marks indicate when a citing case directly quotes the cited case.

FIND

When you know the citation of the document you want, WestCheck can retrieve the full text of the document and send it to a destination you choose. The Find service is available for many types of documents, including case law, statutes, regulations, administrative decisions, articles from publications such as law reviews and treatises, specialized materials (e.g., OSHA inspection and enforcement reports), and materials published in foreign countries.

QUOTERIGHT

Use QuoteRight to verify the accuracy of quotations cited in your document. When WestCheck extracts citations from your document, it also creates a list of quotations found in your document. You can choose to have the QuoteRight service check these quotations against the full text of the documents.

Pricing Information

To use WestCheck, a Westlaw subscription is required. Additional charges can be incurred for each document retrieved and delivered from outside your subscription plan. Prices and availability may vary by price plan. Whether you can access content outside your Westlaw subscription plan, and whether you receive warning prompts if you can, also depends on your plan. For specific WestCheck charges under your price plan, call 1-800-328-4880 or email customerservice@thomsonreuters.com.
2 Using WestCheck

Accessing WestCheck

IN THE INTEGRATED APPLICATION

To access WestCheck from within Microsoft Word or Corel Wordperfect,

1. Open your legal document.
   
   Note   If your DMS supports the Open Document Management API (ODMA), you can open documents in your DMS from the WestCheck stand-alone application.

2. Do one of the following:

   • Click the Westlaw Solutions tab on the word processor ribbon, and then click WestCheck (Microsoft Word 2007 or later).

   ![WestCheck on the Microsoft Word ribbon](image)

   • Click the WestCheck button on the Thomson toolbar (Microsoft Word 2003 or Corel WordPerfect).

   ![WestCheck on the Microsoft Word toolbar](image)

3. At the Westlaw Sign-On dialog box, type your OnePass username and password and a client identifier in the appropriate text boxes and click Sign On.

   ![Westlaw Sign-On dialog box](image)
WestCheck is displayed in the left pane alongside your document.

**IN THE STAND-ALONE APPLICATION**

1. Double-click the **WestCheck** icon on your desktop or click **Start**, point to **All Programs**, point to **Thomson Reuters**, and click **WestCheck**.

2. In the Welcome to WestCheck dialog box, do one of the following:
   - To check citations in a document, select **Extract Cites from a Document** and then click **OK**. In the **Open** dialog box, navigate to the document from which you want to extract citations and then click **Open**. (If WestCheck is already running, on the **File** menu, click **Extract Cites from a Document**.)
   - To check citations in a list you create manually, select **Enter individual citation(s)...**, type or paste your citations in the text box, and click **OK**. (If WestCheck is already running, on the **File** menu, click **Create a New Citations List**.)
3. At the Westlaw Sign-On dialog box, if displayed, type your OnePass username and password and a client identifier in the appropriate text boxes and click **Sign On**.

Westlaw Sign-On dialog box

WestCheck and your document are displayed, with WestCheck features accessible in the left pane.

Opening a Document Saved in a DMS

If your DMS supports the Open Document Management API (ODMA), you can open documents in your DMS from the WestCheck stand-alone application. Note that you must have a DMS client installed on your computer.

In the Welcome to WestCheck dialog box, click **Extract Cites from a Document**, and then click **OK**. If WestCheck is currently running, on the **File** menu, click **Extract from a DMS Document**.

Creating a Citations List

To extract the citations from your document to create a citations list, access WestCheck (see “Accessing WestCheck” on page 3) and click **Extract Citation List**.

**ADDING CITATIONS TO THE CITATIONS LIST**

To manually add a citation to the WestCheck citations list,

1. Click the **Add Citation** button at the top of the citations list. The Add Cites to Citation List dialog box is displayed.
2. In the Citation box, type the citation.
3. In the Title box, type a title for the citation.
4. Click Add.

**LOCATING A CITATION IN YOUR DOCUMENT**

**Locating a Citation**
To quickly locate a citation in your document, select it within the citations list in the left pane. The citation will be highlighted in your document.

**Locating Inaccurate Citations in Your Citations List**
After your citations list has been created, a question mark is displayed before citations that are unverified, or contain potential errors. The question mark will remain until the citation is corrected and WestCheck is run again or the citation is added to the list (see “Adding Citations to the Citations List” above).

A red symbol is displayed before citations that are not available under your subscription.

**PRINTING YOUR CITATIONS LIST**
To print your citations list, click Features in the left frame and then click Print Citation List.

**SAVING YOUR CITATIONS LIST**
To save your citations list, click Features in the left frame and then click Save Citation List.

**Checking Citations and Creating a Report**
You can check your citations in WestCheck using the KeyCite, Find, QuoteRight, and Cited Decisions services and then create an online or offline report.

**Note** If citation verification identified inaccurate citations, edit the citations in your document and reprocess it or add the citation to the list (see “Adding Citations to the Citations List” on page 5).
Using WestCheck

1. Access WestCheck and click **Extract Citation List**. (For details, see “Creating a Citations List” on page 5.)

2. To check individual citations in the citations list, select the check box next to each citation under the service in which you want to check that citation. To select the entire citations list in the same service or services, select the check box under the column heading.

3. To apply a preset service to the citations in your list (e.g., KeyCite History), click a preset service in the list at the top of the citations list. If you select a preset service, it applies to all citations. Or you can select services for each citation.

   If you are a new user, it is recommended that you define preset services for common use cases. This feature allows you to combine the WestCheck KeyCite, Find, QuoteRight, and Cited Decisions services and access them as a single service. See “Creating Preset Services” on page 18 for more information on preset services.

4. Click **Generate WestCheck Report**. The WestCheck Delivery dialog box is displayed.

5. Under Select a Report Option, do one of the following:

   • To view the report online, click **Online report display**. The report will be displayed in a new browser window, from which you can save it or print it. When saving the report, make sure that **Webpage, complete (*.htm, *.html)** is selected in the **Save as type** list; the report will be saved in HTML format so you can open the report in your browser.

   • To send a report to a printer or email address or to download it to your computer, click **Offline report delivery**. In the **Destination** list, click the desired delivery destination. If you select **Email**, type the email address to which you want the report sent in the **Email Address** box. If you select **E-mail** or **Download**, you must also select a format from the **Format** list.

6. To have your Find requests delivered in separate documents, select the **Deliver Find results separately from the report** check box under For Find Results. To deliver all Find requests in a single document (instead of in multiple documents), also select the **Create one file for all Find results** check box.

7. To deliver PDF images of case law documents exactly as they appear in the West reporters, select the **Substitute with Reporter images when available** check box under For Reporter Images. To deliver a single PDF image that contains all of the case law documents in the result, select the **Create one PDF for all Reporter images** check box.

8. To sort the report by citation, click **Citation** under Sort Report By. To sort the report by the services run, click **Services**.

9. Click **Run Report**.
EXCLUDING AND INCLUDING A CITATION

You can exclude or include citations in your citations list when you check your citations. All citations are automatically included unless you decide to exclude them. To exclude or include a citation, do one of the following:

• To exclude a citation, clear the check box preceding it in the citations list.
• To reinstate an excluded citation, select the check box preceding the citation.

Reading Reports

WestCheck reports generated from one of the available Westlaw services consist of a header, summary report, service request summary, and billing report. Reports include KeyCite status flags and depth-of-treatment indicators for cited documents so that you know at a glance whether your authority is good law.

The online report includes the KeyCite status flags, links to the full-text documents on WestlawNext or Westlaw Classic, links to the KeyCite history and citing references, and a navigational index.

For definitions of the KeyCite status flags and the depth of treatment categories in a report, see “KeyCite Appendix” on page 83.

Note  A printed black and white report will display a yellow flag as empty or very lightly shaded, while a red flag will appear more shaded.

In offline plain text reports, KeyCite flags are represented by Red Flg, Yel Flg, H, and C.

• Red Flg = Red Flag
• Yel Flg = Yellow Flag
• H = Blue H
• C = Green C

Sample WestCheck report—online
Limiting KeyCite Results

Use KeyCite Limits to restrict your KeyCite results for cases and statutes. Limiting your results is helpful if you are interested only in specific categories of KeyCite information.

LIMITING KEYCITE RESULTS FOR CASE CITATIONS

1. Access WestCheck (for details, see “Accessing WestCheck” on page 3).
2. Click Features and then click Set KeyCite Limits for All Citations. The KeyCite Retrieval Options dialog box is displayed with the Cases tab selected.

3. To view KeyCite history, select the KeyCite History check box and then select one of the following options from the list:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Negative History Only</td>
<td>WestCheck retrieves only negative history for this case.</td>
</tr>
<tr>
<td>Show Full History (Including Court Documents)</td>
<td>WestCheck retrieves all history for this case, including citations for related court documents, such as petitions, motions, and pleadings.</td>
</tr>
</tbody>
</table>
4. To retrieve citing references, select the **KeyCite Citing References** check box. To restrict the citing references, click **Limit Citations**. The KeyCite–Cases Limits dialog box is displayed.

5. Select the restrictions you want to apply to the citing references.

6. Click **Apply Limits**.

7. Click **OK** in the KeyCite Retrieval Options dialog box.

**LIMITING KEYCITE RESULTS FOR STATUTE CITATIONS**

1. Access WestCheck (for details, see “Accessing WestCheck” on page 3).

2. Click **Features** and then click **Set KeyCite Limits for All Citations**. The KeyCite Retrieval Options dialog box is displayed.

3. Click the **Statutes** tab.

4. To retrieve statutory history, including proposed legislation, credits, and statutory and historical notes, select the **KeyCite History** check box.
5. To retrieve citing references, select the **KeyCite Citing References** check box. To restrict the citing references, click **Limit Citations**. The KeyCite–Statutes Limits dialog box is displayed.

![KeyCite–Statutes Limits dialog box](image)

6. Select the restrictions you want to apply to the citing references.

7. Click **Apply Limits**.

8. Select the **Annotations** check box to include notes of decisions in your result.

9. Click **OK** in the KeyCite Retrieval Options dialog box.
3 Verifying Quotations

Use QuoteRight to verify the accuracy of quotations cited in your document. When WestCheck extracts citations from your document, it also creates a list of quotations found in your document.

If a citation is linked to a quotation, the number of available quotations for the citation is listed after the citation in your citations list. WestCheck also creates a list of quotations found in your document. You can view the extracted quotations for the entire list or you can view the extracted quotations by individual citations.

When a quotation is attached to a citation, WestCheck compares the quotation in the user's document against the actual quotation. QuoteRight displays the quotation text from both the user's document and the cited document, noting if the quotation is identical or different.

For details about the possible actions QuoteRight will take if a quotation cannot be verified, see "Understanding Unverified Quotations" on page 13.

Viewing Quotations by Individual Citation

After creating a citations list (see “Creating a Citations List” on page 5), click the number of the quotation you want to view in the citations list to display the quoted citation in your document.
Viewing a List of Quotations Extracted from Your Document

1. After creating a citations list (see “Creating a Citations List” on page 5), click Browse Quotes at the top of the citations list. The QuoteBrowser window is displayed.

2. Click a quotation in the QuoteBrowser window to display the corresponding citation in your document.

3. Detach a quotation from a citation by dragging the quotation under Unattached Quotes.

4. Attach a quotation under Unattached Quotes by dragging it to the citation you want to attach it to.

5. Close the QuoteBrowser by clicking the Close icon in the upper-right corner.

Understanding Unverified Quotations

If a quotation cannot be verified, following are the possible actions QuoteRight will take.

A quotation is considered unverified if the quotation in your document could not be found in the cited document. If you have an unverified quotation (or quotations) in your QuoteRight result, QuoteRight will deliver results according to the table below.

The following QuoteRight actions assume that you selected the option to deliver the full case if a quotation is unverified. For details on this option, see “Modifying Report Options” on page 18.

<table>
<thead>
<tr>
<th>QUOTERIGHT SERVICE SELECTED, FIND SERVICE NOT SELECTED</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Unverified Quotation Result</strong></td>
</tr>
<tr>
<td>Single unverified quotation attached to a unique citation.</td>
</tr>
<tr>
<td>One unverified quotation among multiple quotations attached to a unique citation.</td>
</tr>
<tr>
<td>Two or more unverified quotations among multiple quotations attached to a unique citation.</td>
</tr>
<tr>
<td>Single unverified quotation attached to a nonunique case law citation.</td>
</tr>
<tr>
<td>One or more unverified quotations among multiple quotations attached to a nonunique case law citation.</td>
</tr>
</tbody>
</table>
When both the QuoteRight and Find services are selected, QuoteRight will not deliver the full case containing an unverified quotation under any circumstances because the Find service will have already delivered the full case.

<table>
<thead>
<tr>
<th>Unverified Quotation Result</th>
<th>QuoteRight Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single unverified quotation attached to a nonunique, non–case law citation.</td>
<td>Attempts to deliver the document. Because it is a nonunique, non–case law citation, a list of the non–case law documents for the specified citation is delivered instead of the full text of the document.</td>
</tr>
<tr>
<td>One unverified quotation among multiple quotations attached to a nonunique, non–case law citation.</td>
<td>Attempts to deliver the document for the unverified quotation. Because it is a nonunique, non–case law citation, a list of the non–case law documents for the specified nonunique citation is delivered instead of the full text of the document.</td>
</tr>
<tr>
<td>Two or more unverified quotations among multiple quotations attached to a nonunique, non–case law citation.</td>
<td>Attempts to deliver the document for the first unverified quotation. Because it is a nonunique, non–case law citation, a list of the non–case law documents for the specified citation is delivered instead of the full text of the document. All other unverified quotations will not have the document delivered.</td>
</tr>
</tbody>
</table>
4 Customizing WestCheck

Modifying WestCheck General Options

1. Access WestCheck (see “Accessing WestCheck” on page 3).
2. Click Features and then click WestCheck Options & Preset Services.

3. On the General tab under QuoteRight, select the number of words under which QuoteRight should not process quotations (e.g., select 2 to indicate that QuoteRight should not process quotations of less than two words). WestCheck will extract the citation but QuoteRight won’t attach quotations under the specified number of words to citations.
4. If you do not want WestCheck to create a list of quotations found in your document when extracting citations, select Do Not Process Quotes After Identification. (Selecting this option improves response time.)
5. Under Cite Finding Options, do one of the following:
   • To send your entire document to a Thomson Reuters server for processing, click Submit Entire Document.
   • To submit only the citations from your document for processing, click Submit Citations Only.
6. To help locate valid local citations, click Publications.
7. In the Default Jurisdiction list, click your default jurisdiction (this aids in identifying citations).
8. Click OK.

Modifying the WestCheck Publications List

WestCheck uses the publications list to help locate valid citations. WestCheck only uses the publications list if you chose the Submit Citations Only option (see step 5 under Modifying WestCheck General Options above).
To access the WestCheck publications list,
1. Access WestCheck (see “Accessing WestCheck” on page 3).
2. Click Features and then click WestCheck Options & Preset Services.
3. On the General tab, click Publications. The Publications dialog box is displayed.

![Publications dialog box]

**ADDING A PUBLICATION TO THE PUBLICATIONS LIST**

To add a publication name and abbreviation to the WestCheck Publications list,

1. In the Publications dialog box, click Add. The Add Publication dialog box is displayed.

![Add Publication dialog box]

2. In the Publication Name box, type the long form of the publication name, e.g., *internal revenue manual*.
3. In the Display Abbreviation box, type the abbreviation that you want displayed for the publication, e.g., i.r.m.
   
   **Note** WestCheck looks for abbreviations when extracting citations.
4. In the Publication Category list, click the type of publication you are adding, e.g., Federal Administrative Reports and Decisions.
5. If your citations to this publication might include abbreviations other than the one you typed in step 3, click Add to enter those abbreviations. The Add Publication Abbreviation dialog box is displayed.
6. In the Publication Abbreviation box, type the abbreviation, e.g., ria-irm, and then click OK.
7. Click OK to close the Add Publication dialog box. The publication you added is displayed in the list of publications. A Book icon is displayed next to publications that you have added.
8. Click OK to close the Publications dialog box.
MODIFYING AN ABBREVIATION IN THE PUBLICATIONS LIST

To modify an abbreviation that you have added for a publication in the WestCheck Publications list,

1. In the Publications dialog box, click the publication in the Publication Names list, and then click Modify. The Modify Publication dialog box is displayed.

![Modify Publication dialog box](image)

2. To modify an abbreviation, click it in the Publication Abbreviations list, and then click Modify. The Modify Publication Abbreviation dialog box is displayed.

   Note You can only modify abbreviations that you have added to the list, which are indicated by the Book icon ( ).

![Modify Publication Abbreviation dialog box](image)

3. In the Publication Abbreviation box, type the new abbreviation, and then click OK.
4. Click OK to close the Modify Publication dialog box.
5. Click OK to close the Publications dialog box.

SEARCHING FOR A PUBLICATION IN THE PUBLICATIONS LIST

To search for a publication by its abbreviation in the WestCheck Publications list,

1. In the Publications dialog box, click Search. The Search for Publication dialog box is displayed.

![Search for Publication dialog box](image)

2. In the Publication Abbreviation box, type the abbreviation of the publication for which you are searching, e.g., mdproc.
3. Click OK. The Modify Publication dialog box is displayed with the matching publication abbreviation highlighted. You can add abbreviations in this dialog box, if desired.
REMOVING A PUBLICATION FROM THE PUBLICATIONS LIST
You can remove publications that you have added to the WestCheck Publications list, which are indicated by the Book icon ( ). You cannot remove the standard publications provided by Thomson Reuters.
1. In the Publications dialog box, in the Publication Names list, click the publication and then click Delete.
2. To confirm that you want to delete the publication, click Yes.
3. Click OK.

Modifying Report Options
You can modify the format and contents of reports for WestCheck results. These reports are generated by one of the available WestCheck services.
1. Access WestCheck (see “Accessing WestCheck” on page 3).
2. Click Features and then click WestCheck Options & Preset Services.
3. Click the Result Report tab.

Modifying Report Options

4. Select your report options.
5. Click OK.

Creating Preset Services
You can create preset services to combine the KeyCite, Find, QuoteRight, and Cited Decisions services in WestCheck and access them as a single service.

CREATING A PRESET SERVICE
To create a preset service,
1. Access WestCheck (see “Accessing WestCheck” on page 3).
2. Click Features and then click WestCheck Options & Preset Services.
3. Click the Preset Services tab.
4. Click New.
5. In the Service Name box, type a name for the new preset service (e.g., KeyCite History) and click Add.
6. Under Services, select the check boxes preceding the services you want to include (e.g., KeyCite).
7. If you select KeyCite, you can set your KeyCite limits. See “Limiting KeyCite Citations” below.
8. Click OK.
LIMITING KEYCITE CITATIONS

Case Law
To limit KeyCite case law citations for a preset service,

1. Click Features and then click WestCheck Options & Preset Services.
2. Click the Preset Services tab and click the preset service for which you want to limit KeyCite citations (if necessary).
3. Under Services, make sure the KeyCite check box is selected.
4. Click Set Limits. The KeyCite Retrieval Options dialog box is displayed.

5. To include KeyCite history in the preset service, select the KeyCite History check box and then click an option in the list: Negative History Only, Show Full History (Excluding Court Docs), or Show Full History (Including Court Docs).

6. To retrieve citing references, select the KeyCite Citing References check box. To restrict the citing references, click Limit Citations. The KeyCite–Cases Limits dialog box is displayed.

7. Select the restrictions you want to apply to the citing references.
8. Click Apply Limits.
9. Click OK.
Statutes
1. Complete steps 1–4 under “Case Law” on page 19. The KeyCite Retrieval Options dialog box is displayed.
2. Click the Statutes tab.

![KeyCite Retrieval Options dialog box showing the Statutes tab](image)

3. Select the KeyCite History check box to retrieve statutory history, including proposed legislation, credits, and statutory and historical notes.
4. To retrieve citing references, select the KeyCite Citing References check box. To restrict the citing references, click Limit Citations. The KeyCite–Statutes Limits dialog box is displayed.

![KeyCite–Statutes Limits dialog box](image)

5. Select the restrictions you want to apply to the citing references.
6. Click Apply Limits.
7. To include notes of decisions in your result, select the Annotations check box.
8. Click OK.

**CHANGING THE DEFAULT PRESET SERVICE**

Click the preset service you want to use as your default from the preset services list at the top of the citations list. The selection will be preserved when you start a new session.
Selecting Citation Categories
You can specify the categories that are included in your citations list. WestCheck automatically places each citation in the citations list into one of the following categories:

- Cases
- Statutes
- Law Reviews and Bar Journals
- Court Rules and Orders
- Administrative Reports and Decisions
- Regulations

To change which categories are displayed,

1. Click **Features** in the left pane and then click **WestCheck Options & Preset Services**.
2. Click the **Select Citation Categories** tab.

3. Select the check boxes preceding any categories you want to include in your citations list.
4. Click **Apply**.
5. Click **OK**.

You can also click **Select Categories for Processing** in the left pane to specify your citation categories.