



CALIFORNIA JURY INSTRUCTION SELECTOR™

USER GUIDE



THOMSON REUTERS™

Westlaw®
CD-ROM Series

Customer Support

Issue	Resource
Technical questions concerning the Jury Instruction Selector software	Call West Customer Technical Support at 1-800-848-3475.
Questions concerning a key code	Call West Customer Technical Support at 1-800-848-3475.
General questions about this and other West products	Call West Customer Service at 1-800-328-4880.

Content Editor: Ellie Grinols (Thomson Reuters)

Technical Writer: Nita Beck (NitaBeck Communications)

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610 Opperman Drive
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Organization

The User Guide is organized into several chapters and offers a comprehensive index as well.

- Chapter 1, "Introducing Jury Instruction Selector," introduces you to *Jury Instruction Selector* and tells you how to install the program, including updates available from West's web site.
- Chapter 2, "Getting Started with Jury Instruction Selector," describes how to get started using Jury Instruction Selector. It offers a tour of the application window, as well as several general procedures such as starting and exiting the program.
- Chapter 3, "Managing Instruction Files," focuses on managing instruction files (both instruction sets and instructions lists). It begins by defining the difference between instruction sets and instruction lists. It then offers step-by-step procedures for managing these sets and lists (starting new ones, opening existing ones, saving, and so forth).
- Chapter 4, "Working with Case Information," explains how to set up the information that is specific to a case, such as the presiding court, the attorney, the parties, acts, dates, locations, and so forth. Later, you can auto-populate your Selected Instructions with this information.
- Chapter 5, "Working with Jury Instructions," focuses on working with instructions. It includes procedures for viewing the text and Commentary of Master Instructions, for finding specific instructions, for selecting instructions for inclusion in an instruction set, and for editing instructions in various ways. (This chapter does not cover how to create Personal Instructions; see instead Chapter 7.)
- Chapter 6, "Printing Jury Instructions," describes the various formats in which you can provide printed jury instructions. It also offers procedures for setting various printing preferences and for printing, previewing, and printing instructions to a file.
- Chapter 7, "Creating Personal Instructions," explains how to create custom instructions, called *Personal Instructions*. Once created, they can be selected for inclusion in an instruction file and edited with case information just the same as Selected Instructions based on Master Instructions.

Companion resources

In addition to this User Guide, you can find more information about Jury Instruction Selector in several companion resources:

- What's New – This PDF document answers offers highlights of the new and enhanced program features. For more information, see "Find out what's new," page 17.
- Comprehensive Help system – The program's Help system covers much of the material in the User Guide. It also offers a series of Frequently Asked Questions (FAQs). See "Use the Help system," page 17.
- Quick Start Guide – This short document (provided both as a PDF installed with the program and as a printed guide for new subscribers) gives you quick instructions for installing the program and for getting oriented to its user interface and most used features. To open the PDF while running the program, choose **Help > Quick Start Guide**.

Get assistance from West

If you have a question about or a problem with Jury Instruction Selector and cannot find the answers in the Help system or the *Quick Start Guide*, please contact West for assistance.

Software problems and questions

Customer Technical Support offers assistance with software products. Call 1-800-848-3475 or send email to west.appsupport@thomson.com.

IMPORTANT! ABOUT ALTERNATIVE OPERATING ENVIRONMENTS: California Jury Instruction Selector is designed to be compatible with the standard Windows operating systems listed in the system requirements and to function correctly under those installation configurations outlined in this User Guide. Customer Technical Support is available to all users working under those conditions. West does not claim compatibility with any other operating systems, multi-user environments, or installation configurations such as Mac OS, Linux, Novell, Citrix, Terminal Services, etc., and we are unable to provide support for California Jury Instruction Selector in any alternate operating environment or installation configuration not specifically included in this User Guide.

Training

West's training group offers by-appointment, one-on-one customer training over the telephone. Our trainers offer live, web-based demonstrations while answering specific questions to help users learn the program quickly. To make an appointment with a trainer, call 1-800-328-0109.

Questions about your West account

Customer Service assists with account questions. You can reach us at 1-800-328-4880 or send email to west.customer.service@thomson.com.

Give feedback to West

If you would like to make comments or suggestions regarding the features or functions of Jury Instruction Selector, please send email to the product team at jis.feedback@thomsonreuters.com.

NOTE: The product team reads all comments sent to the above email address, but cannot directly respond to each message. When you need immediate assistance, call 1-800-848-3475.

To offer feedback on a particular topic in the program's Help system, use the *Send feedback about this Help topic* link at the upper right corner of the Help window.

Stay current with the latest updates

Be sure to sign up for West's free notification service regarding web updates. Whenever we release a new update of Jury Instruction Selector, you'll get an email message from us with a link to the update. If you did not sign up during installation, click or copy this URL into your browser:

<https://pc2.mypreferences.com/ThomsonReutersUSLegal/Profile>

You can also get web updates on demand. With the program running, click the **Check for online updates** link on the **Start** tab or choose **Help > Check for Updates**. Or, click or copy this URL into your browser: info.legalsolutions.thomsonreuters.com/software/ca-selector

NOTE: For information about other West products, visit legalsolutions.thomsonreuters.com/law-products/ or call 1-800-328-4880.

CHAPTER 1. INTRODUCING JURY INSTRUCTION SELECTOR

This chapter introduces you to Jury Instruction Selector and tells you how to install the program, including updates available from West’s web site.

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What is Jury Instruction Selector?

Welcome to California Jury Instruction Selector, a Windows®-based software application originally designed by Judge Richard A. Adler of the Superior Court of Los Angeles.

California Jury Instruction Selector works in both stand-alone and networked environments. With it, you can create personalized, "approved" criminal and civil jury instructions. You can:

- complete information about your case
- search for and select relevant jury instructions
- edit and print relevant, case-specific jury instructions for submission to the court

With the program's searching and sorting features, you can scroll through the master list of jury instructions, jump to specific instructions, or perform targeted searches for specific terms or phrases. The program also includes commentary for guidance in selecting the most relevant jury instructions. Once you have chosen instructions, you can quickly adapt them to meet the requirements of a specific court case.

Jury Instruction Selector offers these useful features:

- **Case information tab** – Here you store all of your case-specific information such as the name and number of the case, court and attorney information, the names of parties, and all other persons, entities, acts, dates, items, and locations that are pertinent to the case.
- **Multiple print formats** – Allow printing jury instructions in the traditional single-page format (Rule 201), on Los Angeles County Forms 176/177, or in a booklet containing numerically arranged instructions, table of contents, and separate disposition table.
- **Editing features** – Spell checker, auto-populating selected instructions with stored case information, and the ability to create custom instructions provide completely case-specific documents.

- **Coverage of civil issues** – Includes negligence, torts, products liability, vicarious responsibility, and contractual relationships.
- **Coverage of criminal issues** – Includes definitions, general rules, evidence, homicide, accessory, crimes against the government, life, security of person, sex, public health, safety and welfare, property, misdemeanors, and defenses.

System requirements

Before installing Jury Instruction Selector, make sure your computer meets these minimum requirements:

- Operating system – For all installations, .NET 3.5 or higher is required. For a local or workstation installation, one of the following is required: Microsoft Windows 10, 8, 7 (32- or 64-bit), or Vista (SP2) (32- or 64-bit). For a network installation, a Microsoft Windows-based server environment (Windows Server 2003 or later) is recommended.
- Processor – Pentium III 500 Mhz
- Memory – 128 MB of available RAM (256 MB recommended)
- Storage – 250 MB of available storage space
- Monitor – 800 x 600 or higher resolution
- Printer – Laser printer with Printer Control Language (PCL) Level 4 or 5 support
- Media – CD-ROM drive
- Westlaw access – To use Westlaw links within the program, you must have:
 - An Internet browser such as Microsoft Internet Explorer 6.0, Firefox 2.0, or Safari 2.0 or later, with JavaScript and cookies enabled and frames fully supported and pop-ups allowed
 - A connection to the Internet

Important notices regarding installation

IMPORTANT! ABOUT ALTERNATIVE OPERATING ENVIRONMENTS: California Jury Instruction Selector is designed to be compatible with the standard Windows operating systems listed in the system requirements and to function correctly under those installation configurations outlined in this User Guide. Customer Technical Support is available to all users working under those conditions. West does not claim compatibility with any other operating systems, multi-user environments, or installation configurations such as Mac OS, Linux, Novell, Citrix, Terminal Services, etc., and we are unable to provide support for California Jury Instruction Selector in any alternate operating environment or installation configuration not specifically included in this User Guide.

IMPORTANT! ABOUT WORKSTATION INSTALLATION FROM MSI: Workstation installation *must* be run on all computers using a networked version of California Jury Instruction Selector. For your convenience, a workstation installation can be run directly from the CA Jury Instruction Selector.msi, bypassing setup.exe. However, the following Microsoft software (available on Microsoft's web site) *must* be installed first on users' computers before the MSI installation is run:
(1) .NET Framework version 3.5.
(2) MDAC drivers version 2.8.

IMPORTANT! ABOUT NETWORK DISTRIBUTION: Because of the number of different network distribution applications available, West cannot support or offer advice on how to distribute our software using third-party network distribution software such as ZENWorks or Microsoft's SMS.

Install Jury Instruction Selector

Jury Instruction Selector can be installed on a stand-alone computer or on a network and workstations. This section describes three types of installations:

- **Local** – Installs the program, its database, and its support files (such as PDFs of reference documents) to a local (stand-alone) computer.
- **Network** – Installs only the database and support files to a network location that can be accessed by users running workstation installations.
- **Workstation** – Installs only the program on a networked computer (a "workstation") from which a user will access the program database and support files from the network location.

Local installation

A local installation installs all files required to run Jury Instruction Selector on a stand-alone PC. Have your key code(s) ready, as you will be prompted to unlock the program's modules during the installation.

Exit all applications before beginning the installation procedure.

To perform a local installation

IMPORTANT! Before installing Jury Instruction Selector, review "Important notices regarding installation," previous page.

1. Insert the Jury Instruction Selector CD into the CD drive.
The InstallShield Wizard window opens briefly as the InstallShield Wizard is prepared. When the wizard is ready, the **Welcome** window opens. Click **Next** to begin.

*At any time during the installation, you can exit the setup program by clicking **Cancel** on any of the wizard's windows. You can then click **Yes** to exit the installation completely.*

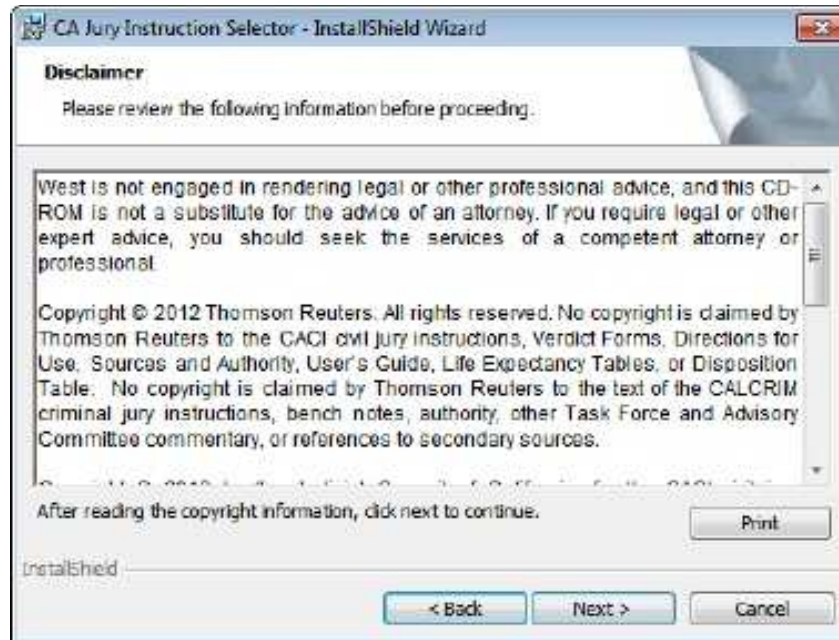


2. On the **Disclaimer** window, review the disclaimer and click **Next** to continue.

Chapter 1. Introducing Jury Instruction Selector

Install Jury Instruction Selector

You may print the disclaimer if you wish.

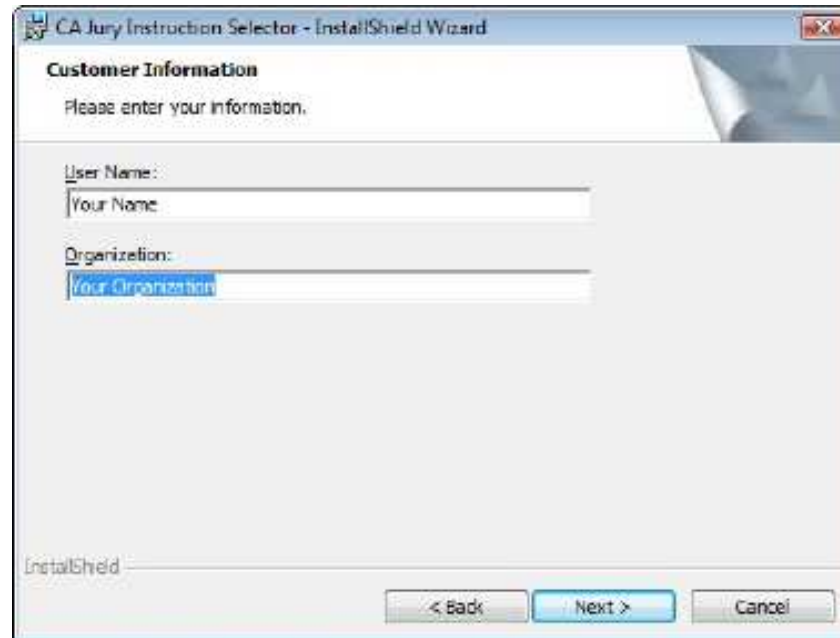


3. On the **License Agreement** window, review and accept the agreement and click **Next** to continue.

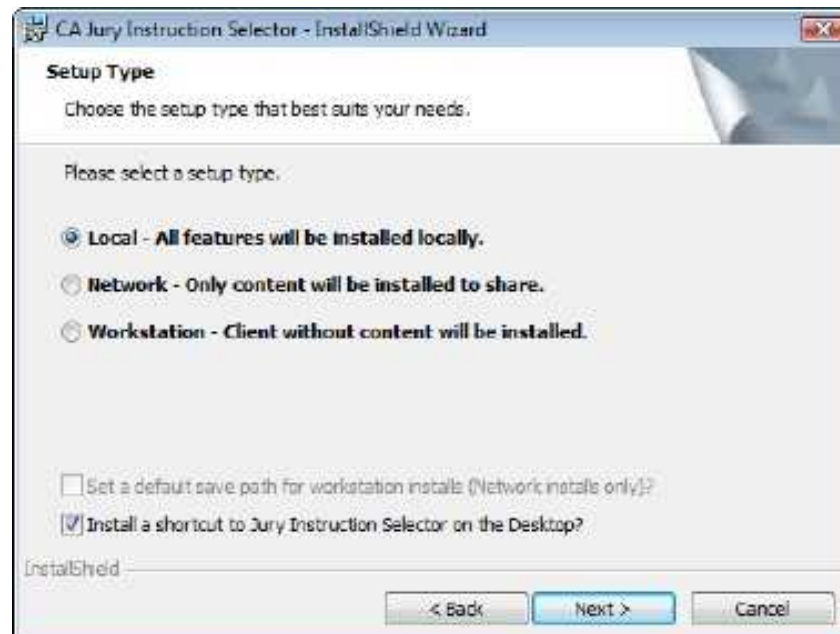
You may print the license agreement if you wish. (Or, while running the program), choose **Help > User License** to view the license.



4. On the **Customer Information** window, enter your customer information, and click **Next** to continue.



5. On the **Setup Type** window, select *Local*. If you do *not* want the wizard to install a program shortcut on your desktop, clear the *Install a shortcut...* check box. Click **Next** to continue.



6. On the **Destination Folder** window, the default location where program files will be installed is shown. Click **Next** to continue.

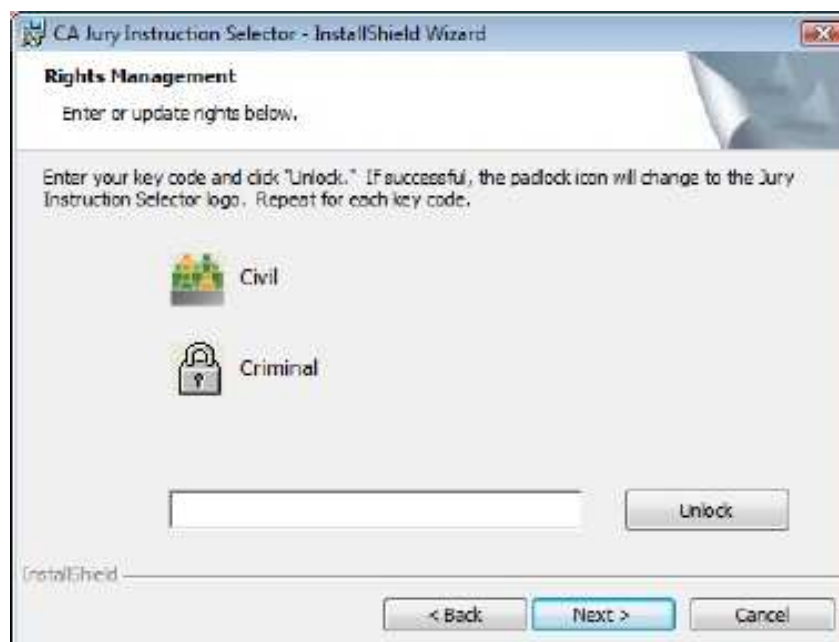
Chapter 1. Introducing Jury Instruction Selector

Install Jury Instruction Selector

We recommend that you use the default location, but you may choose a different one.



7. On the **Rights Management** window, any locked module is depicted by a padlock icon. To unlock a module, enter its key and click **Unlock**. In response to the confirmation message, click **OK**. The padlock icon will change to the Jury Instruction Selector logo.

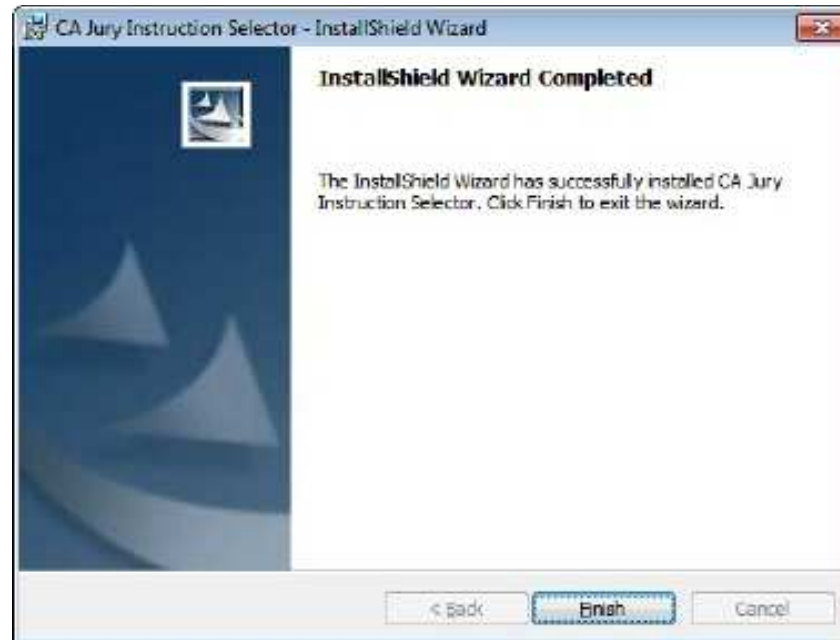


NOTE: If the key code is not recognized, an error message appears. Click **OK** to dismiss the message and re-enter the key code. If you continue to have a problem, call 1-800-848-3475.

Repeat to unlock the other module, if needed.

Click **Next** to continue.

8. Follow the rest of the wizard's windows to complete the installation.
9. When the wizard is complete, click **Finish** to close.



10. The wizard will have started up your default browser to load the West's **Software Update Notification Service** web page. Here you can sign up for free product update notifications. Select the products of interest, enter your contact information, and click **Submit**. (You will need to close the browser manually.)

Network installation

A network installation installs the program's database and shared files (such as PDFs of reference documents) to a network location. It does not install the program itself. Users running workstation installations will be able to access the database and shared files from that network location.

Have your key code(s) ready, as you will be prompted to unlock the program's modules during the installation.

Exit all applications before beginning the installation procedure.

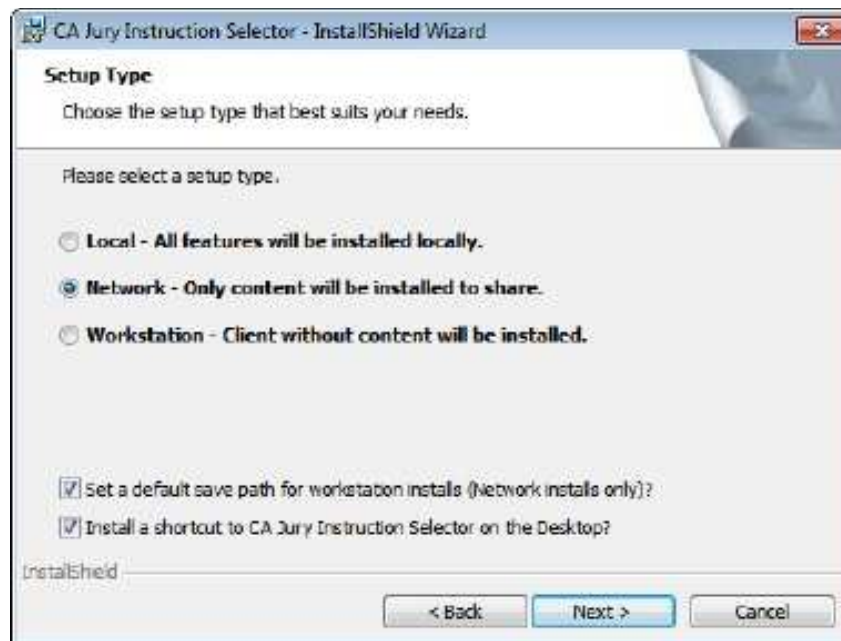
NOTE: After completing the network installation, be sure to perform a workstation installation on each individual computer. See "Workstation installation," page 9.

To perform a network installation

IMPORTANT! Before installing Jury Instruction Selector, review "Important notices regarding installation," page 2.

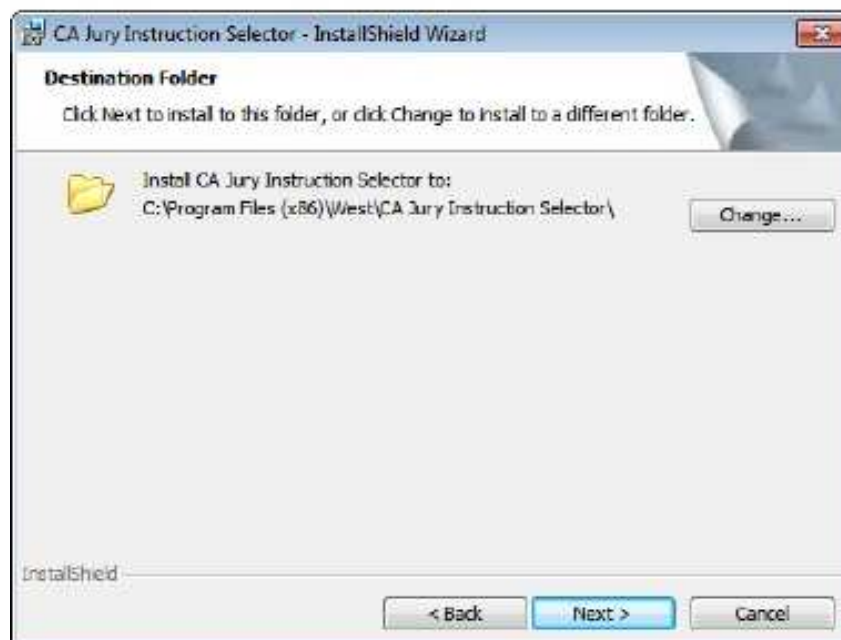
1. Complete steps 1–4 of the local installation procedure (from page 3).
2. On the **Setup Type** window, select *Network* and do the following:
 - If you want to set a default save path for workstation installations, select the check box *Set a default save path for workstation installs (Network installs only)?* This will automatically set the default save/load location in the **Options** window for all workstations.
 - If you do *not* want the wizard to install a program shortcut on your desktop, clear the check box *Install a shortcut to CA Jury Instruction Selector on the Desktop?*

Click **Next** to continue.

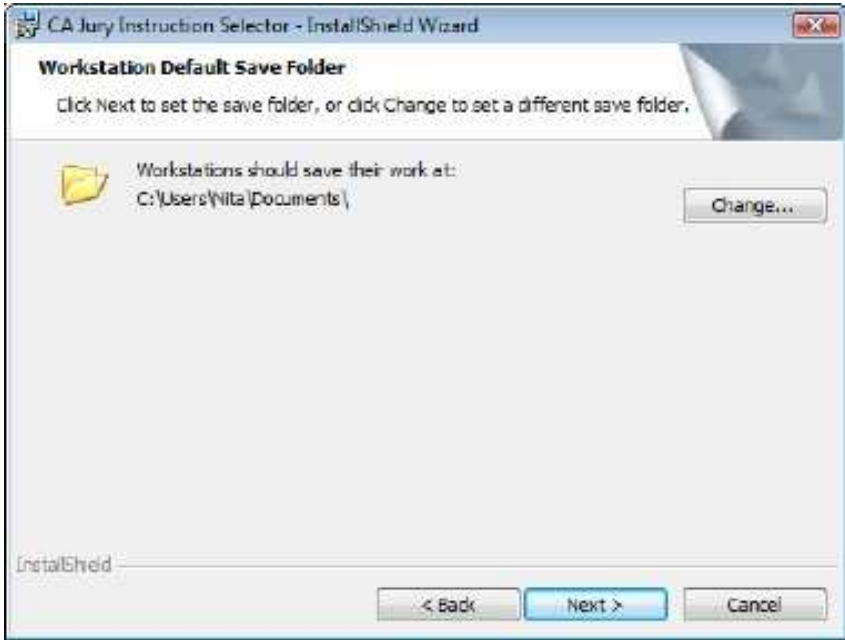


3. On the **Destination Folder** window, the default location where program files will be installed is shown. Click **Next** to continue.

NOTE: We recommend that you use the default location, but you may choose a different one.



4. If you elected to set the default save path for workstations, the **Workstation Default Save Folder** window opens, showing the program's default save location. To change the default save location, type a new, full path. Click **Next** to continue.



5. Follow steps 7–10 of the local installation (continuing from page 6) to complete the installation.

NOTE: After completing the network installation, be sure to perform a workstation installation on each individual computer. See "Workstation installation," below.

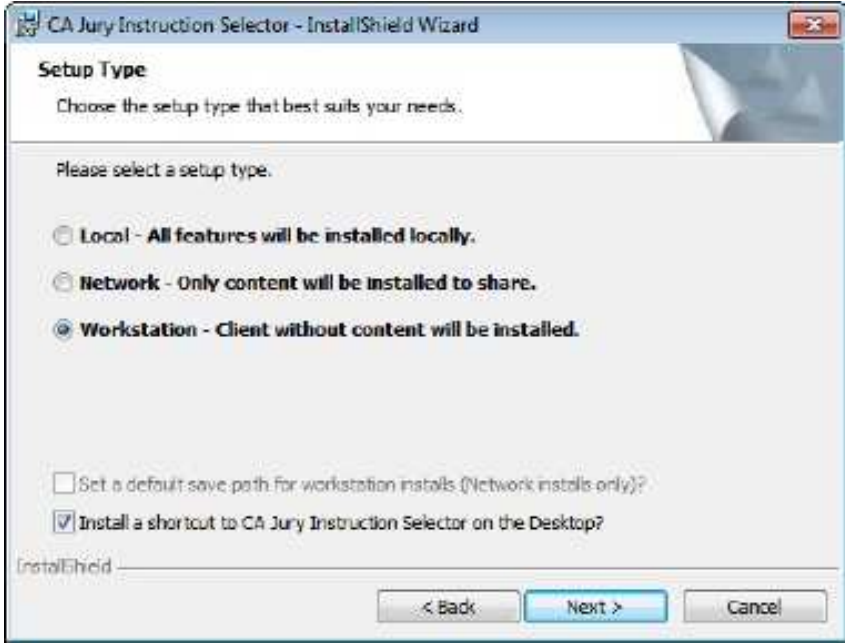
Workstation installation

A workstation installation installs only the program on a computer that will access the database and shared files from a network location. You must have already performed a network installation.

To perform a workstation installation

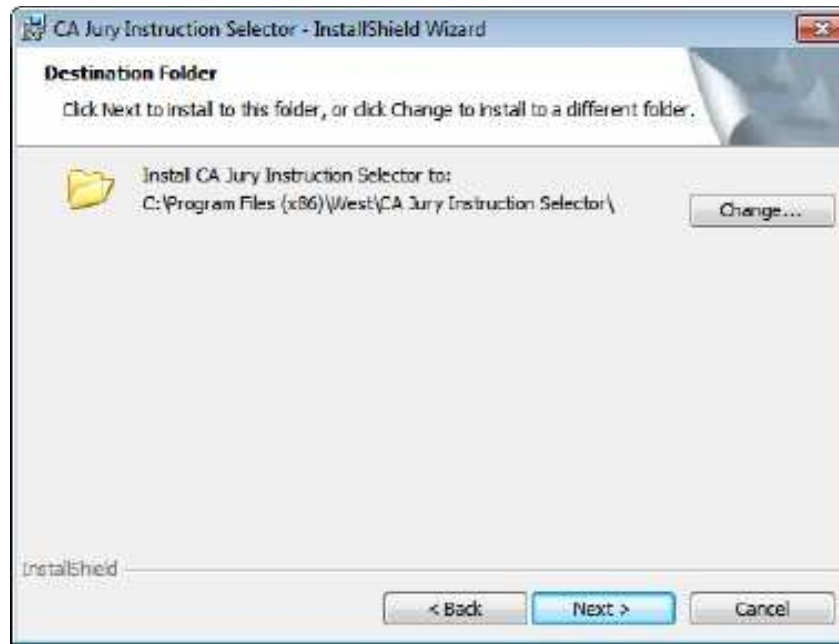
IMPORTANT! Before installing Jury Instruction Selector, be sure to review "Important notices regarding installation," page 2.

1. Complete steps 1–4 of the local installation procedure (from page 3).
2. On the **Setup Type** window, select *Workstation*. If you do *not* want the wizard to install a program shortcut on your desktop, clear the *Install a shortcut...* check box. Click **Next** to continue.

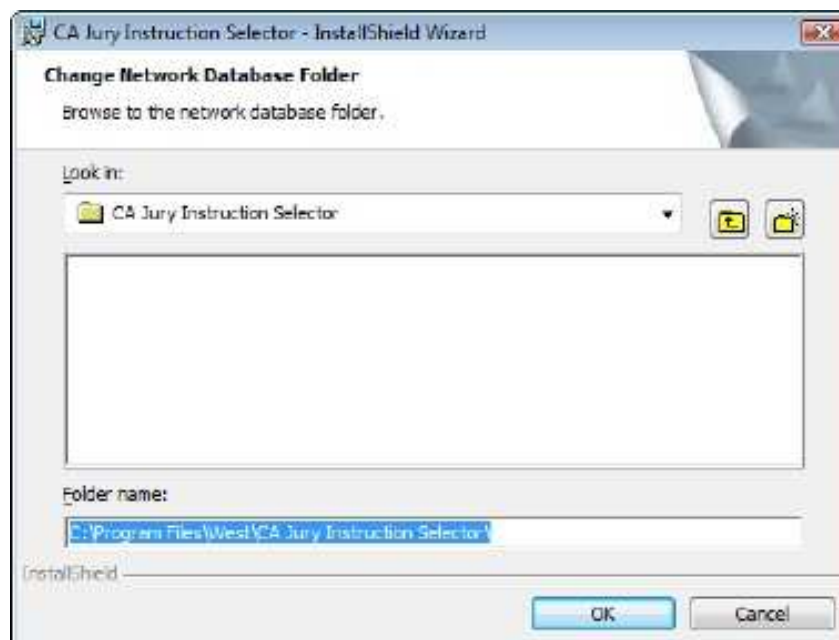


3. On the **Destination Folder** window, the default location where the program will be installed is shown. Click **Next** to continue.

We recommend that you use the default location, but you may choose a different one.



4. The next window to appear is the **Network Database Folder** window (not illustrated). If, during network installation, you installed the database and shared files to a custom location, click **Change** to open the **Change Network Database Folder** window. Navigate to and select the custom location and click **OK**. Back on the **Network Database Folder** window, click **Next** to continue.



5. Follow steps 7–10 of the local installation (continuing from page 6) to complete the installation.

Install web updates

You might find it helpful to regularly consult the Jury Instruction Selector software downloads web page for important product information and updated files. Visit the following web page, where you'll find download and installation instructions for web updates.

info.legalsolutions.thomsonreuters.com/software/ca-selector

You can also sign up for the free Software Update Notification Service. Each time a product you request notification for is updated, you will receive a notification message via email with a link to the update. The notification will also include a list of the new features or fixes included in the update. To sign up for the service, visit the following web page:

<https://pc2.mypreferences.com/ThomsonReutersUSLegal/Profile>

Once you begin using Jury Instruction Selector, you can check for updates right from the program itself.

Reinstall or uninstall Jury Instruction Selector

To reinstall or uninstall Jury Instruction Selector, use your standard Windows feature for adding or removing programs. In the Control Panel of Windows 7 or Vista, use **Programs and Features**. In the Control Panel of Windows XP, use **Add or Remove Programs**.

Reinstalled files are always placed in the same folder as the original installation files.

Uninstalling the program does not delete user files (instruction sets and instruction lists). They will still be stored in the program's default save location (folder). If you no longer need these files, you may delete the folder.

CHAPTER 2. GETTING STARTED WITH JURY INSTRUCTION SELECTOR

This chapter describes how to get started using Jury Instruction Selector. It offers a tour of the application window, as well as several general procedures such as starting and exiting the program.

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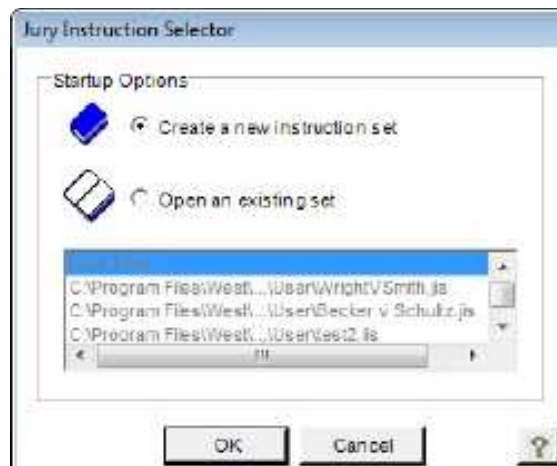
Quick Start Guide for new users

If you're a new user, be sure to check out the *Quick Start Guide*. This short document (provided both as a PDF installed with the program and as a printed guide for new subscribers) gives you quick instructions for installing the program and for getting oriented to its user interface and most used features. To open the PDF while running the program, choose **Help > Quick Start Guide**.

Start up Jury Instruction Selector

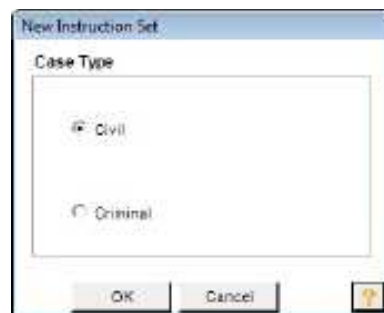
To start Jury Instruction Selector

1. From the Windows **Start > All Programs** menu, choose **West > CA Jury Instruction Selector > CA Jury Instruction Selector**. (Alternatively, double-click the CA Jury Instruction Selector desktop icon.)
The **Startup Options** window opens, listing instruction sets and lists (if any) that were previously opened in Jury Instruction Selector.



NOTE: If you prefer, you can "turn off" the **Startup Options** window so that it won't appear the next time you start the program. (See "Turn off the Startup Options window," page 20.)

2. Do either of the following:
- To create a new instruction set, select *Create a new instruction set* and click **OK**. The **New Instruction Set** window opens.



Select the casetype and click **OK**.

- To open an existing instruction file, select *Open an existing set*, select the desired file from among those listed, and click **OK**. (Alternatively, click *More Files* to navigate to a desired file).

The new file or the selected existing file is loaded.

Jury Instruction Selector window

You do all of your work in the **Jury Instruction Selector** window (Figure 2-1). The window's components include:

- **Title bar** – Identifies the instruction file that is currently loaded.
- **Menu bar** – Provides access to the full set of the program's commands and resources.
- **Main toolbar** – Provides quick access to commonly used features. (For more information on this and other toolbars, see page 16.)
- **Tabs** – From which you will add case-specific information, select jury instructions, and print the jury instructions. When you first start up the program, it opens at the **Start** tab, from which you can quickly access details of the currently installed version of the program and check for updates. (For more information, see "Tabs," facing page.)
- **Status bar** – Shows the type of case, the full path and file name of the instruction file, the version of the program, and the date as of which content (e.g., jury instructions, references) was last updated.

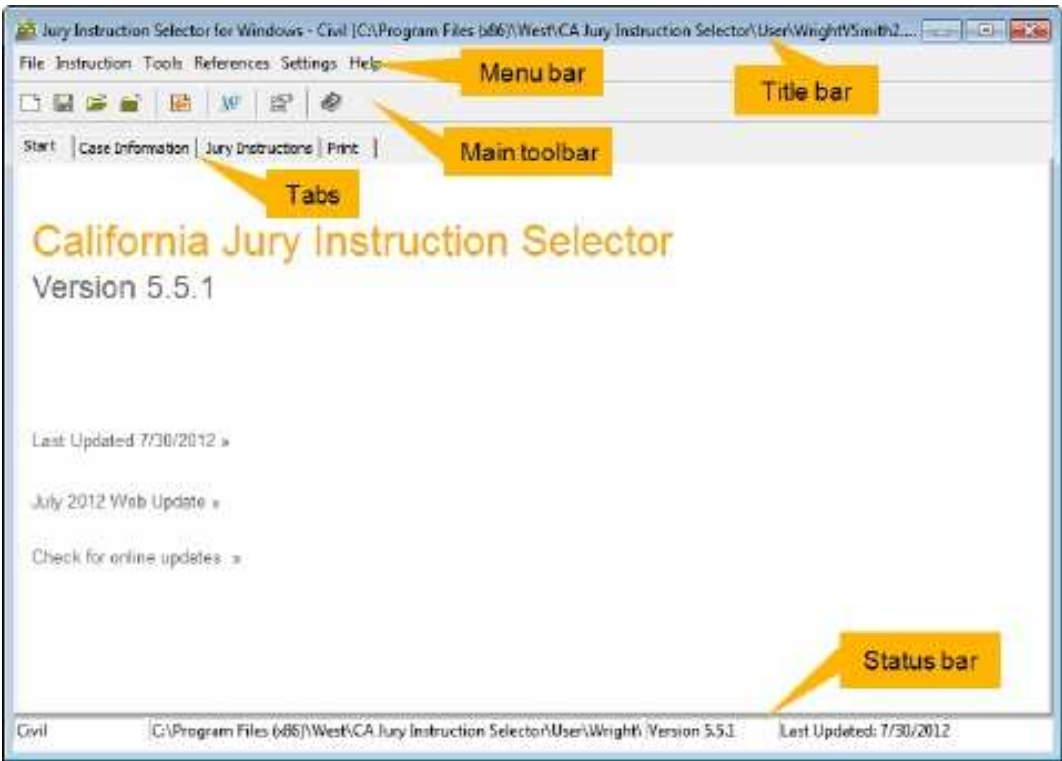


Figure 2-1. *The main Jury Instruction Selector window, open at its Start tab*

NOTE: When this window opens, it fills the entire screen. It is shown above resized to save space. Feel free to resize it to a size that you find comfortable to work with.

Tabs

The Jury Instruction Selector window has several tabs (some further divided into pages) on which you will do most of your work.

Table 2-1. *Tabs of the Jury Instruction Selector window*

Tab	Description
Start	<p>This tab offers links for:</p> <ul style="list-style-type: none">• Viewing software and content information about the installed version of the program.• Viewing what's new in the installed version of the program.• Checking for web updates. (See "Stay current with the latest updates," page ix.)
Case Information	<p>This tab offers a series of pages on which you will enter information about the case. For example, here you enter the number and name of the case, the plaintiffs and defendants in the case, and the district and court where the case is being heard. You will also enter the names of various individuals and other entities involved with the case in some aspect, such as the name of a witness. Finally, you will enter names of additional individuals and entities, as well as other details pertinent to the case, such as dates, acts, property, items, and locations.</p> <p>See Chapter 4.</p>

Tab	Description
Jury Instructions	This tab offers a series of pages from which you will select instructions to include in the jury instructions you are preparing. From here, you can auto-populate the instructions with the abovementioned case information, further edit instructions manually as needed, fine-tune the order in which they will appear when printed, and track the history and status of the instructions' modifications. See Chapter 5.
Print	This tab offers a series a pages used for printing your jury instructions. You will select which instructions you want to print and then select a format (e.g., Booklet or Single Page). See Chapter 6.

Toolbars

Jury Instruction Selector has several types of toolbars that give you quick access to features just where you need them.

- **Main toolbar** – As part of the main Jury Instruction Selector window, this toolbar is always present. It gives you ready access to features such as *New*, *Save*, and *Open*.
- **Tab toolbars** – The program's various tabs, such as the **Jury Instructions** tab, each have their own toolbar of tab-specific features.
- **Page toolbars** – Most of the tabs are further divided into pages, some of which have their own page toolbars of page-specific features.
- **Window toolbars** – Many windows, such as the **Edit** window where you will edit jury instructions, also have their own toolbars. (Some windows also have their own menu bars with even more features.)

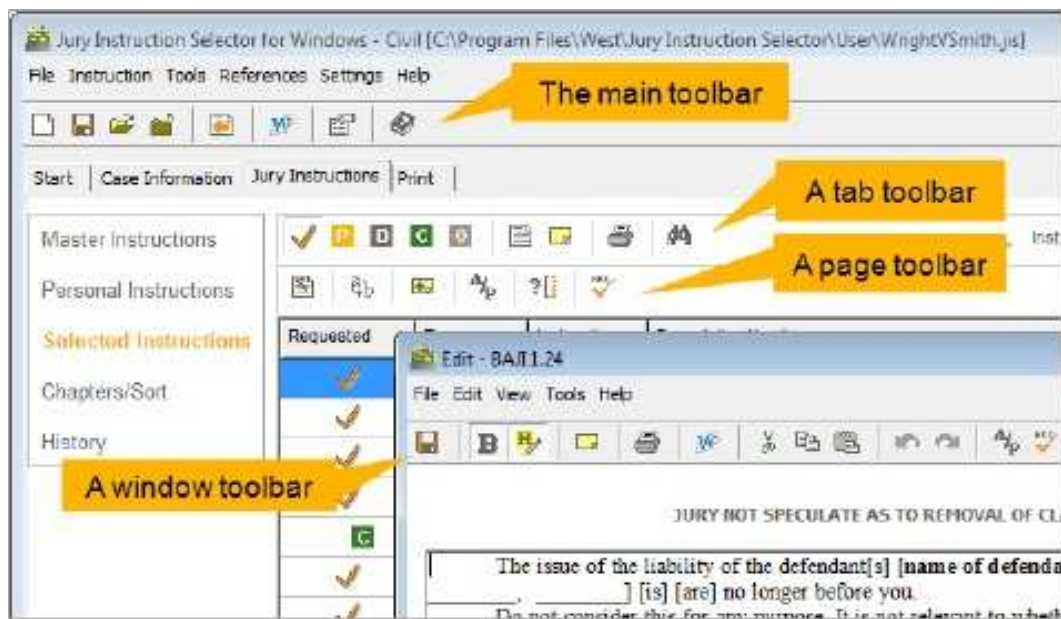


Figure 2-2. Various toolbars available in Jury Instruction Selector

Get assistance as you work

When you need help using Jury Instruction Selector, check out the following resources. (See also "Get assistance from West," page viii.)


Find out what's new

There are two resources from which you can find out what's new in the version of Jury Instruction Selector installed on your computer.

- View the *What's New.pdf* document, which is stored in the folder where the program was installed. (This document is similar to the program's shipping insert.) To access this document, do either of the following:
 - If the program is not running, go to the **Windows Start > All Programs** menu and choose **West > CA Jury Instruction Selector > What's New**.
 - If the program is running, choose **Help > What's New** or click the Update>> link on the **Start** tab. (The precise wording of the link will vary, depending on the version number of the update.)
- Visit the "What's new in Jury Instruction Selector" topic in the program's Help system.

Use the Help system

Jury Instruction Selector's comprehensive Help system is a convenient, easy way to find how-to information and reference information.

To open the program's Help system at its first topic, click  **Help Contents** on the main toolbar or choose **Help > Help**.

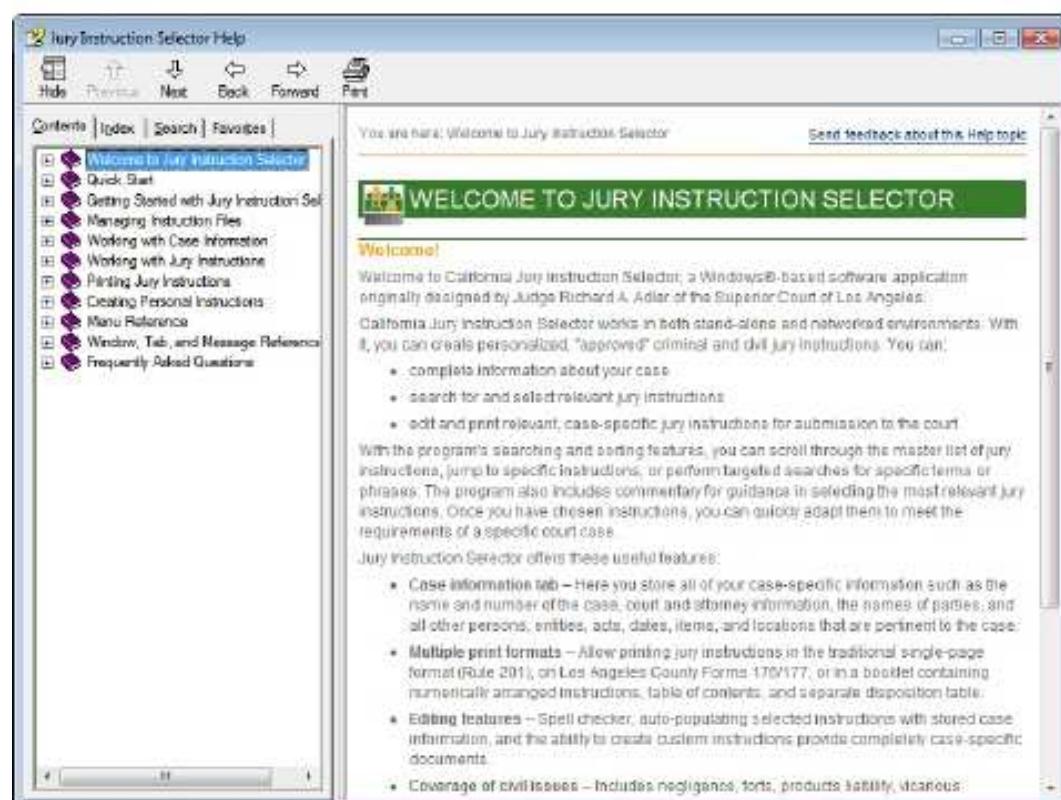


Figure 2-3. *Jury Instruction Selector Help system*









Alternatively, to open it at the topic that pertains to the active tab or window, click the window or dialog box's  **Help** button.



Figure 2-4. *Help button on a window*

Once the Help system is open, you can freely navigate it with any of the following techniques.


Table 2-2. *Techniques for using the comprehensive Help system*

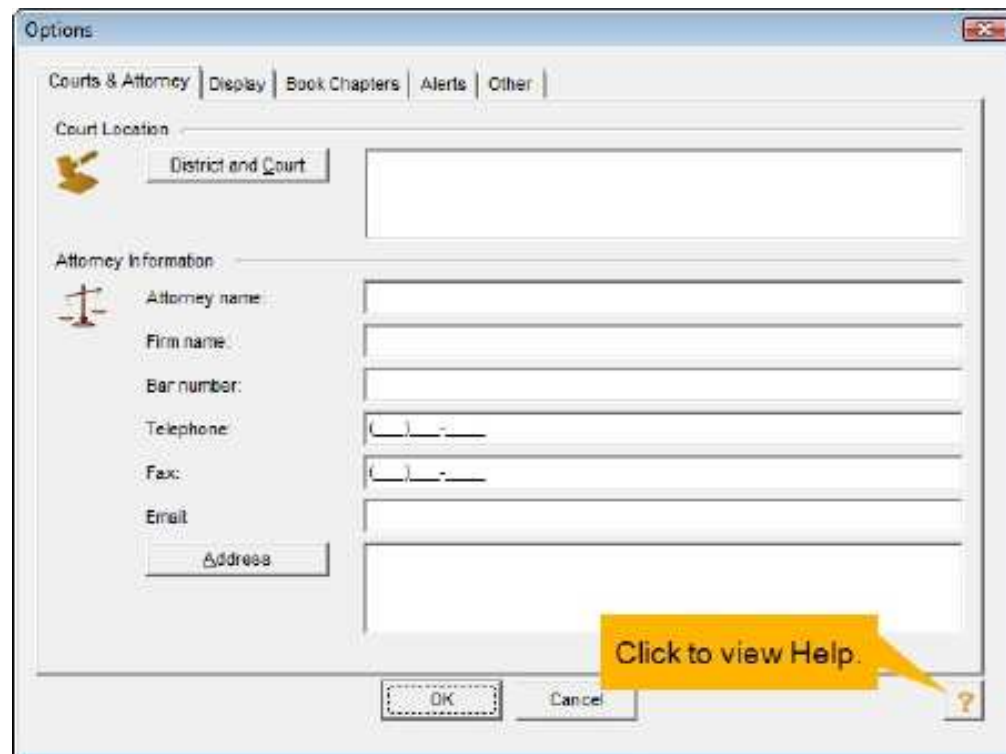
Feature	Used to
Contents tab	Select a topic from a table of contents.
Index tab	Select a topic from a list of keywords.
Search tab	Search for specific text within the entire Help system, which is especially useful when the subject you are interested in may be covered in different topics.
Favorites tab	Add topics to your list of favorite topics. To add a topic, navigate to it, switch to the Favorites tab, and click Add (at the bottom of the tab).
 Hide  Show	Hide or show the navigation pane (the tabs).
 Previous  Next	Display, respectively, the previous topic and next topic, relative to the currently displayed topic. In this way, you can step up and down the table of contents.
 Back  Forward	Display, respectively, the last topic you visited and the next topic you visited.
 Print	Print the topic or set of topics selected in the Contents.
"You are here" breadcrumb links	See at a glance where the current topic is located in the Help system. Click a link to select another topic in the same breadcrumb path.
Links in topics	Jump to related topics.
"Send feedback" link	Help us improve the Help system. Just click the <i>Send feedback about this Help topic</i> link at the upper right corner of the Help window to send us e-mail about the currently displayed topic.
	Close the Help system.

Define the default district, court, and firm

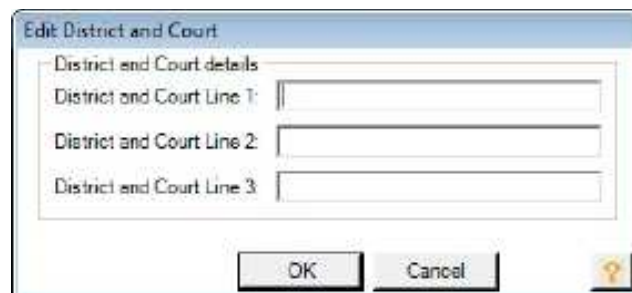
Before creating instruction files, take the time to define the default district and court, as well as default firm (attorney information). By defining these items, you will save yourself the trouble of typing in this information for each instruction file you create. (You can always override these defaults when you set up case-specific information. See "Set up the court and attorney," page 43.)

To define the default district and court and the default attorney information

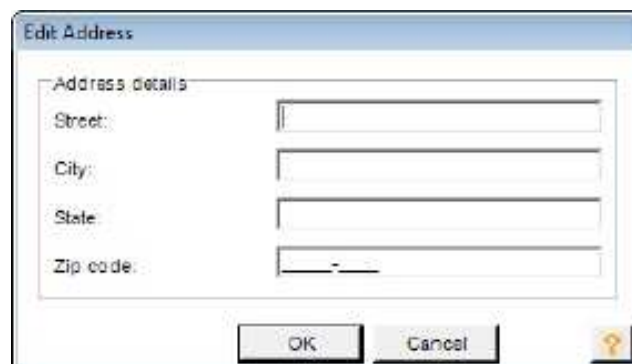
1. Click  **Options** on the main toolbar, or choose **Settings > Options**.
The **Options** window opens at its **Courts & Attorney** tab.



2. To enter the default district and court, do the following:
 - a. In the *Court Location* section, click **District and Court** to open the **Edit District and Court** window.



- b. Complete the fields as needed, and then click **OK** to save and close.
3. To enter the default firm, do the following:
 - a. In the *Attorney Information* section, complete the fields as needed.
 - b. To enter the firm's address, click **Address** to open the **Edit Address** window.



- c. Click **OK** to save and close.
4. If finished with the **Options** window, click **OK** to save and close.

Turn off the Startup Options window

By default, the **Startup Options** window opens when you start up Jury Instruction Selector. It offers a quick way to create a new instruction set or to open an existing instruction set.

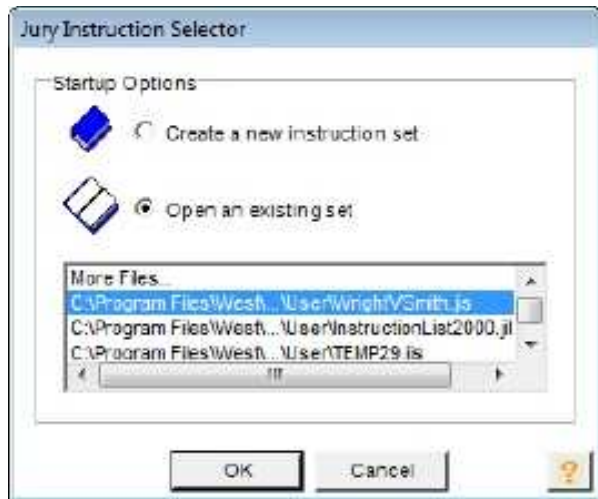

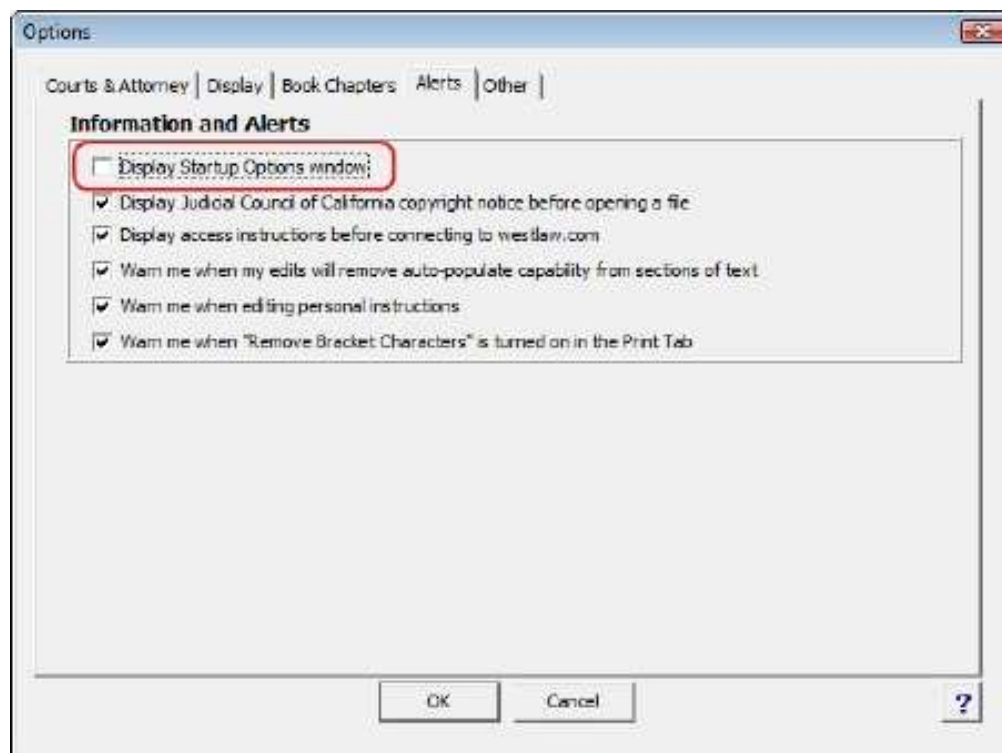


Figure 2-5. *The Startup Options window*

If you'd prefer not to see this window, you can easily turn this feature off. (You can easily turn it back on if you later change your mind.)

To turn off the Startup Options window

1. Click  **Options** on the main toolbar, or choose **Settings > Options**.
The **Options** window opens at its **Courts & Attorney** tab.
2. Switch to the **Alerts** tab and clear the *Display Startup Options window* check box.




3. Click **OK** to save and close.
The next time you start up the program, the startup options will not appear.

Set the default save location

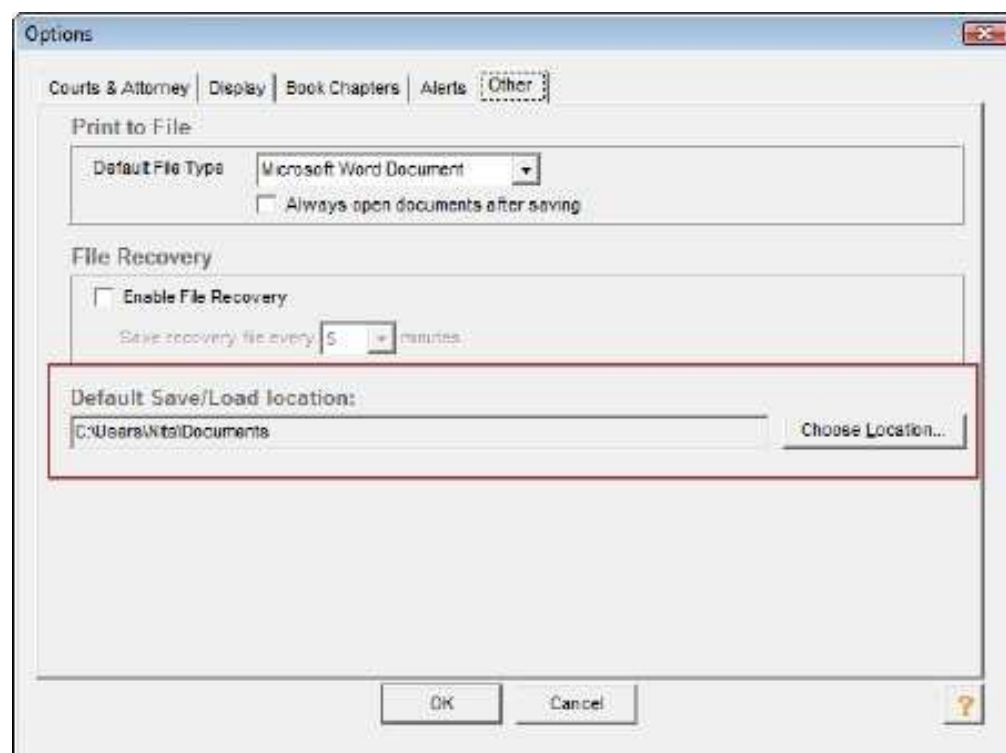
You can set the default location where your jury instruction files and print-to-file jobs will be saved.

NOTE: If you are running a workstation installation of the program, the default save location was probably already set up by your network administrator. You may want to check with the administrator before changing the save location.

To set the default save location

1. Click  **Options** on the main toolbar, or choose **Settings > Options**.
The **Options** window opens.
2. Switch to the **Other** tab.
3. In the *Default Save/Load Location* section, click **Choose Location** to open the **Browse For Folder** window (not illustrated). Browse to or make a new folder to use as the default save location and click **OK**.

The path of the location you selected appears in the *Default Save/Load Location* box.




4. Click **OK** to save and close.

Turn on File Recovery

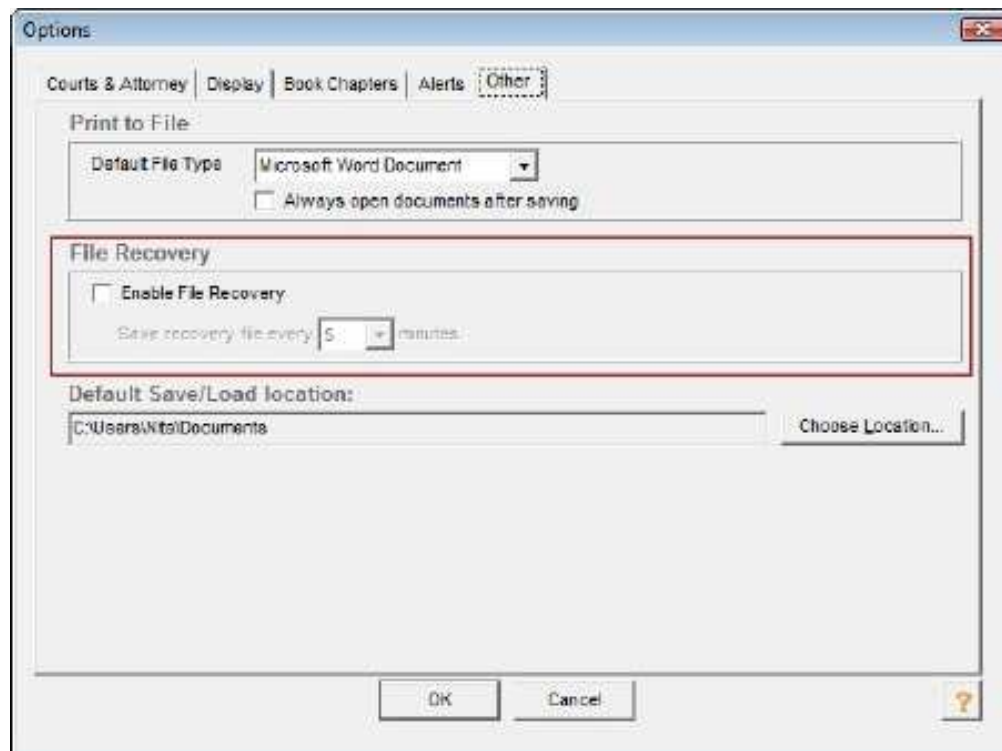
With the *File Recovery* feature (formerly called *Auto Save*), you can have Jury Instruction Selector automatically save a recovery file at regular intervals. In the event that the program exits unexpectedly, the program will prompt you to open the recovery file the next time you start up the program.

Use the following procedure to turn on File Recovery.

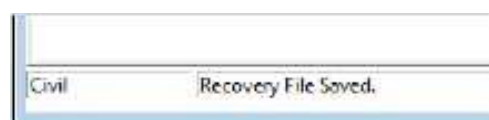
To turn on File Recovery

1. Click  **Options** on the main toolbar, or choose **Settings > Options**.
The **Options** window opens.

2. Switch to the **Other** tab.
3. In the *File Recovery* section, select the *Enable File Recovery* check box, and then type or select the number of minutes (from 1 to 10) after which you want the open instruction file to be saved automatically.




4. Click **OK** to save and close.
Until you turn the feature off, Jury Instruction Selector will automatically update the recovery file every *n* minutes that you selected. When it does, you will see *Recovery File Saved* in the status bar of the Jury Instruction Selector window.

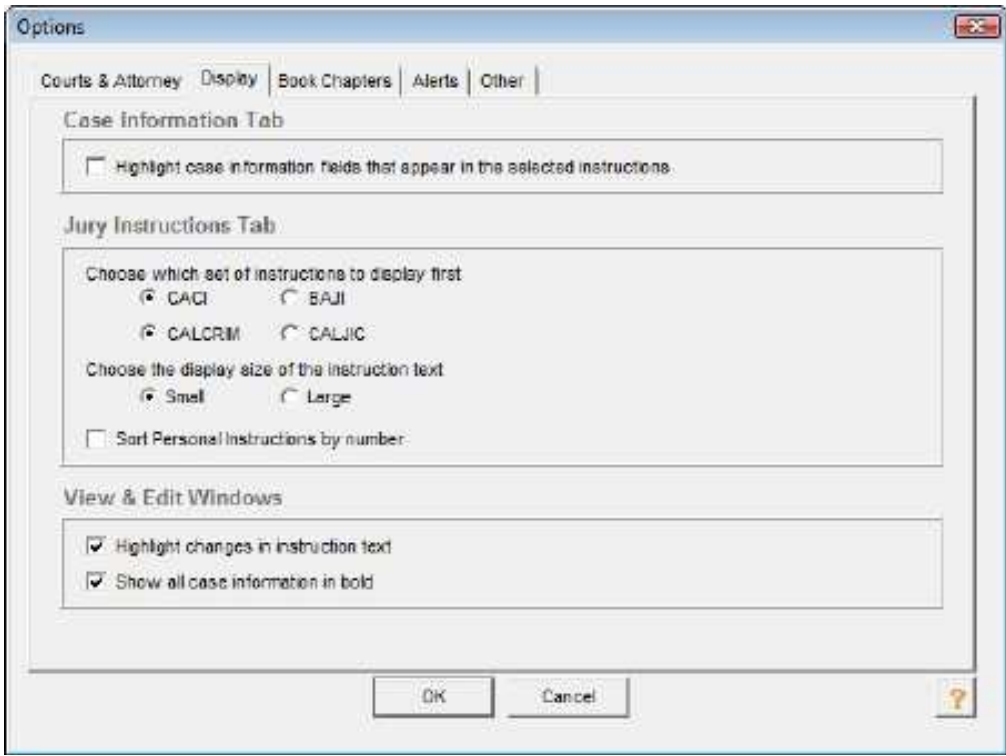


Set display options

With the display options, you can control how jury instructions appear in Jury Instruction Selector. Experiment with the settings to suit your preferences.

To set display options

1. Click  **Options** on the main toolbar, or choose **Setting > Options**.
The **Options** window opens.
2. Switch to the **Display** tab.



3. Set the options as desired.

Case Information Tab	Highlight case information fields that appear in the selected instructions	Select to highlight on the Case Information tab's Party Types , Acts , Dates , Items & Locations , and Miscellaneous pages any auto-populate field (a field that can be replaced with entered case information) that can be found in the Selected Instructions in the open instruction file. This is a handy way to tell which fields you need to complete. (For information on the Case Information tab and its related pages, begin with "Case Information tab," page 42.)
Jury Instruction Tab	Choose which set of instructions to display first	Select which set of instructions (e.g., BAJI, CACI) you want to appear first on the Jury Instructions tab's Master Instructions page. (See "Master Instructions page," page 54.)
	Choose the display size of the instruction set	Select the size of instruction text displayed on any of the pages of the Jury Instructions tab. (For information on the Jury Instructions tab and its related pages, begin with "Jury Instructions tab," page 54.)
View & Edit Windows	Highlight changes in instruction text	Select to use yellow highlighting to show the differences between original instruction text and any changes (e.g., manual edits, auto-populated edits, etc.) in Selected Instructions opened for editing. (For more information on editing Selected Instructions, begin with "Select and edit instructions for your instruction file," page 61.)
	Show all case information in bold	Select to use bold to show case information in Selected Instructions opened for editing.

4. Click **OK** to save and close.

Set up chapter defaults

This section describes how to work with the chapter defaults associated with the Booklet print format. You can modify the chapter defaults to suit your preferences.

For more information on the Booklet format, including sample pages, see "Booklet format," page 87.

About chapter defaults

A standard format for submitting approved instructions to a jury is the *Booklet format*, in which instructions are organized into chapters. By default, every instruction in Jury Instruction Selector is assigned to a specific chapter of the Booklet format, based on its instruction number. For example, civil instructions numbered in the 100 series are assigned to a chapter called PRETRIAL, whereas civil instructions in the 3500 series, which pertain to issues of eminent domain, are within a chapter called EMINENT DOMAIN. Within each chapter, the instructions are arranged numerically.

You can modify the chapter defaults to suit your preferences.

Jury Instruction Selector differentiates between chapters of civil instructions and chapters of criminal instructions. The following tables outline the chapters as defined at the program's installation.

Table 2-3. Default chapters of civil instructions

Chapter	From Inst. #	Up to Inst. #
GENERAL INSTRUCTIONS	0.05	2.00
GENERAL INSTRUCTIONS	1.00	2.00
EVIDENCE AND GUIDES FOR ITS CONSIDERATION	2.00	3.00
NEGLIGENCE –CONTRIBUTORY NEGLIGENCE –CAUSATION	3.00	4.00
TORT LAW--SPECIAL DOCTRINES	4.00	5.00
MOTOR VEHICLES	5.00	6.00
OTHER NEGLIGENCE ACTIONS	6.00	7.00
INTENTIONAL TORTS	7.00	8.00
OWNERS, OCCUPANTS OR LESSORS OF LAND	8.00	9.00
PRODUCTS LIABILITY	9.00	10.00
CONTRACTUAL RELATIONSHIPS	10.00	11.00
STATUTORY ACTIONS	11.00	12.00
MISCELLANEOUS ACTIONS	12.00	13.00
VICARIOUS RESPONSIBILITY	13.00	14.00
DAMAGES	14.00	15.00
CONCLUDING INSTRUCTIONS	15.00	16.00
FORMS OF SPECIAL VERDICTS AND JUDGMENTS ON SPECIAL VERDICT	16.00	17.00
ANNOTATIONS TO CACI	17.00	18.00
PRETRIAL	100	200
EVIDENCE	200	300
CONTRACTS	300	400
NEGLIGENCE	400	500
MEDICAL NEGLIGENCE	500	600
PROFESSIONAL NEGLIGENCE	600	700
MOTOR VEHICLES AND HIGHWAY SAFETY	700	800
RAILROAD CROSSINGS	800	900

Chapter	From Inst. #	Up to Inst. #
COMMON CARRIERS	900	1000
PREMISES LIABILITY	1000	1100
DANGEROUS CONDITION OF PUBLIC PROPERTY	1100	1200
PRODUCTS LIABILITY	1200	1300
ASSAULT AND BATTERY	1300	1400
FALSE IMPRISONMENT	1400	1500
MALICIOUS PROSECUTION	1500	1600
EMOTIONAL DISTRESS	1600	1700
DEFAMATION	1700	1800
RIGHT OF PRIVACY	1800	1900
FRAUD OR DECEIT	1900	2000
TRESPASS	2000	2100
CONVERSION	2100	2200
ECONOMIC INTERFERENCE	2200	2300
INSURANCE LITIGATION	2300	2400
WRONGFUL TERMINATION	2400	2500
FAIR EMPLOYMENT AND HOUSING ACT	2500	2600
CALIFORNIA FAMILY RIGHTS ACT	2600	2700
LABOR CODE ACTIONS	2700	2800
WORKERS' COMPENSATION	2800	2900
FEDERAL EMPLOYERS' LIABILITY ACT	2900	3000
CIVIL RIGHTS	3000	3100
ELDER ABUSE AND DEPENDENT ADULT CIVIL PROTECTION ACT	3100	3200
SONG-BEVERLY CONSUMER WARRANTY ACT	3200	3300
UNFAIR PRACTICES ACT	3300	3400
CARTWRIGHT ACT	3400	3500
EMINENT DOMAIN	3500	3600
CONSPIRACY	3600	3700
VICARIOUS RESPONSIBILITY	3700	3800
EQUITABLE INDEMNITY	3800	3900
DAMAGES	3900	4000
LANTERMAN-PETRIS-SHORT ACT	4000	4100
BREACH OF FIDUCIARY DUTY	4100	4200
UNIFORM FRAUDULENT TRANSFER ACT	4200	4300
UNLAWFUL DETAINER	4300	4400
TRADE SECRETS	4400	4500
CONCLUDING INSTRUCTIONS	5000	5100

Table 2-4. *Default chapters of criminal instructions*


Chapter	From Inst. #	Up to Inst. #
GENERAL INSTRUCTIONS	0.05	2.00
GENERAL INSTRUCTIONS	1.00	2.00
EVIDENCE AND GUIDES FOR ITS CONSIDERATION	2.00	3.00
CULPABILITY FOR CRIME	3.00	4.00
EXEMPTIONS AND DEFENSES	4.00	5.00
GENERAL PRINCIPLES OF JUSTIFICATION	5.00	6.00
ANTICIPATORY AND ACCESSORIAL CRIMES	6.00	7.00
CRIMES AGAINST THE ADMINISTRATION OF GOVERNMENT	7.00	8.00
CRIMES AGAINST LIFE	8.00	9.00
CRIMES AGAINST SECURITY OF PERSON	9/00	10.00
SEX CRIMES	10.00	11.00
CRIMES AGAINST PUBLIC HEALTH, SAFETY AND WELFARE	12.00	13.00
CRIMES AGAINST PROPERTY	14.00	15.00
CRIMINAL WRITINGS	15.00	16.00
MISDEMEANOR INSTRUCTIONS	16.00	17.00
CONCLUDING INSTRUCTIONS	17.00	18.00
ANNOTATIONS TO CALCRIM	18.00	19.00
PRETRIAL	100	200
POST-TRIAL: INTRODUCTORY	200	300
EVIDENCE	300	400
AIDING AND ABETTING, INCHOATE, AND ACCESSORIAL CRIMES	400	500
HOMICIDE	500	800
ASSAULTIVE AND BATTERY CRIMES	800	1000
SEX OFFENSES	1000	1200
KIDNAPPING	1200	1300
CRIMINAL THREATS AND HATE CRIMES	1300	1400
CRIMINAL STREET GANGS	1400	1500
ARSON	1500	1600
ROBBERY AND CARJACKING	1600	1700
BURGLARY AND RECEIVING STOLEN PROPERTY	1700	1800
THEFT AND EXTORTION	1800	1900
CRIMINAL WRITINGS AND FRAUD	1900	2100
VEHICLE OFFENSES	2100	2300
CONTROLLED SUBSTANCES	2300	2500
WEAPONS	2500	2600
CRIMES AGAINST GOVERNMENT	2600	2800

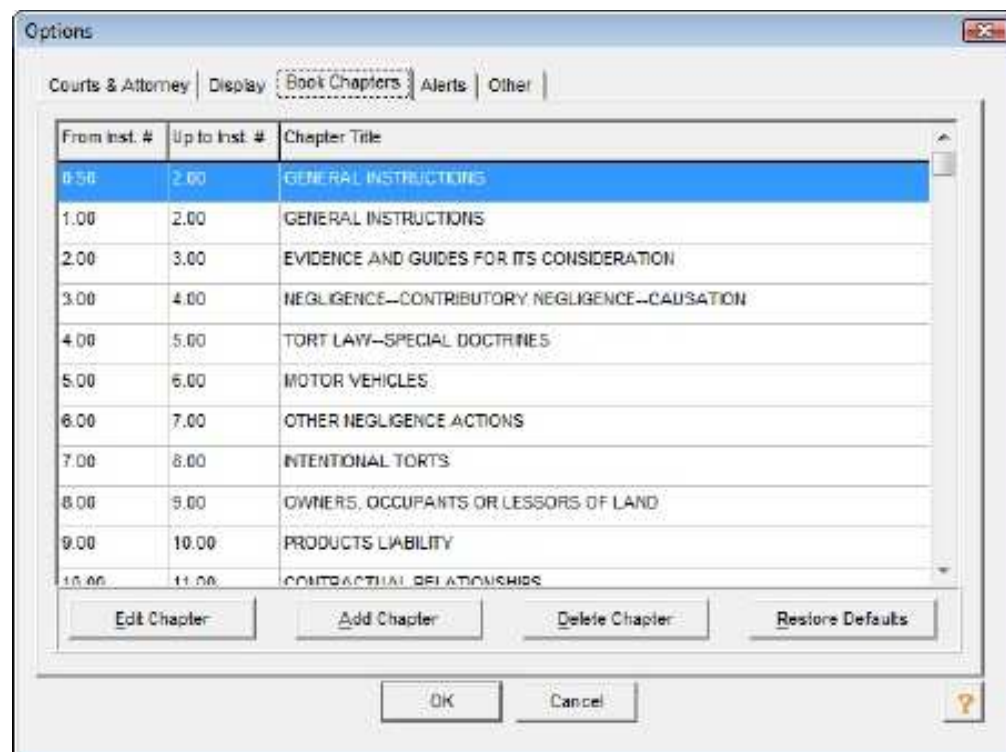
Chapter	From Inst. #	Up to Inst. #
TAX CRIMES	2800	2900
VANDALISM, LOITERING, TRESPASS, AND OTHER MISCELLANEOUS OFFENSES	2900	3000
ENHANCEMENTS AND SENTENCING FACTORS	3100	3300
DEFENSES AND INSANITY	3400	3500
POST-TRIAL: CONCLUDING TABLES	3500	3600

Open the chapter defaults for modifying

Use the following procedure to access the chapter defaults for the Booklet format so that you can modify them.

To access the chapter defaults

1. If necessary, open a case of the type (e.g., civil or criminal) whose chapter defaults you want to access and modify.
2. Click  **Options** on the main toolbar, or choose **Settings > Options**. The **Options** window opens.
3. Switch to the **Book Chapters** tab.



You are now ready to modify the default chapters.

Add default chapters

Use the following procedure to add a default chapter to the Booklet template and identify the chapter's contents (by range of instruction numbers). For example, you might want to create a chapter that will contain Personal Instructions (if you've established sequential numbers for them). The program will automatically position the new chapter among the other chapters based on its starting instruction number.

NOTE: Regarding the range of instruction numbers in a chapter, the starting instruction will be included in the chapter, while the ending instruction will be excluded from the chapter. The ending instruction is actually the point **before which** the chapter will end.

To add a default chapter to the Booklet template

1. Open the chapter defaults (see previous page).
2. On the **Options** window's **Book Chapters** tab, click **Add Chapter**.
The **Add Chapter** window opens.

NOTE: Yellow in a field means that the field does not contain a valid entry. When you first add a chapter, the fields will be blank, and therefore, technically, invalid. As you set up the new chapter, pay attention to the Help Text that will appear at the bottom of the window for guidance.

3. In the *Start Instruction* and *End Instruction* boxes, type or select the numbers of the chapter's starting instruction and ending instruction.

NOTE: The drop-down lists show all of the Master Instructions as well as any Personal Instructions. To quickly jump to a specific instruction in a list, type the first few digits/letters of its instruction number.

4. In the *Chapter Title* box, enter the title. (The program does not require that the title be in all caps, but you might prefer to do so for consistency with other chapter titles.)
5. Click **OK** to save and close.
The new chapter is added to the list of chapters.

TIP: Check the list to verify that the new chapter's range of instructions does not overlap with those of the chapter immediately preceding it. If there is any overlap, the overlapping instructions will end up appearing in both chapters. To correct this, edit the preceding chapter's ending instruction number accordingly. (See "Edit default chapters," below.)

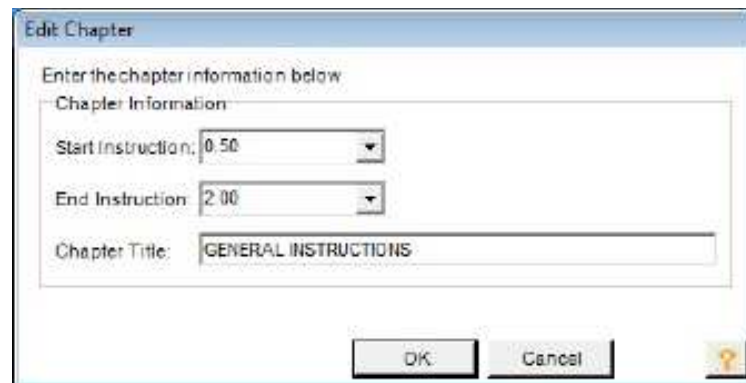
Edit default chapters

You can edit a default chapter's title and the range of instructions the chapter contains.

NOTE: Regarding the range of instruction numbers in a chapter, the starting instruction will be included in the chapter, while the ending instruction will be excluded from the chapter. The ending instruction is actually the point **before which** the chapter will end.

To edit a default chapter of the Booklet template

1. Open the chapter defaults (see previous page).
2. On the **Options** window's **Book Chapters** tab, click **Edit Chapter**.
The **Edit Chapter** window opens.



NOTE: As you edit the chapter, if a field turns yellow, it means your entry is not valid. Pay attention to the Help Text that will appear at the bottom of the window for guidance.

3. In the *Start Instruction* and *End Instruction* boxes, type or select the numbers of the chapter's starting instruction and ending instruction.

NOTE: The drop-down lists show all of the Master Instructions as well as any Personal Instructions. To quickly jump to a specific instruction in a list, type the first few digits/letters of its instruction number.

4. In the *Chapter Title* box, edit the title as desired. (The program does not require that the title be in all caps, but you might prefer to do so for consistency with other chapter titles.)
5. Click **OK** to save and close.

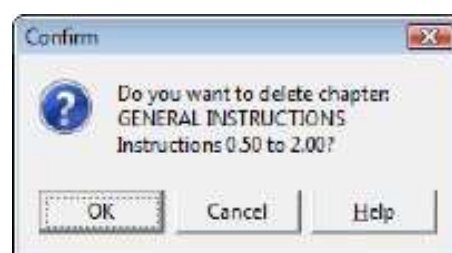
TIP: Check the list to verify that the chapter's range of instructions does not overlap with those of the chapter immediately preceding it. If there is any overlap, the overlapping instructions will end up appearing in both chapters. To correct this, edit the preceding chapter's ending instruction number accordingly.

Delete default chapters

When you delete a default chapter from the Booklet template, you remove the container for a range of instructions. For instance, were you to remove the chapter containing any of the instructions in the 100 series, **no** instructions with any of those numbers, **even if selected in the instruction file**, will appear in the printed booklet.

To delete a chapter from the Booklet template

1. Open the chapter defaults (see page 27).
2. Select the chapter you want to delete and click **Delete Chapter**.
3. In response to the confirmation message, click **OK**.

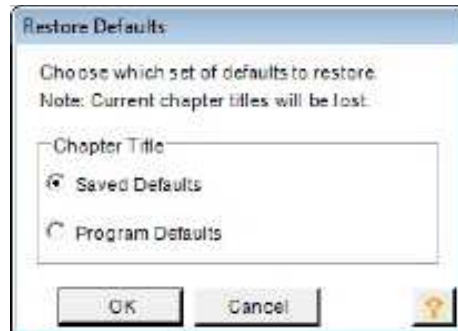


Restore chapter defaults

You may find that you'd like to restore the Booklet template to its default chapter settings. You can actually restore back to last saved defaults or to the defaults at program installation.

To restore the default chapters

1. Access the chapter defaults. (See page 27.)
2. On the **Options** window's **Book Chapters** tab, click **Restore Defaults**.
The **Restore Defaults** window opens.




3. Select the desired option, *Saved Defaults* or *Program Defaults*.
4. Click **OK** to save and close.

Access Westlaw from within Jury Instruction Selector

As you use Jury Instruction Selector, you can quickly access Westlaw material. A connection to the Internet must already be active.

To access Westlaw from within Jury Instruction Selector

1. Click  **Westlaw Research** on the main toolbar, or choose **References > Westlaw Online Research**.

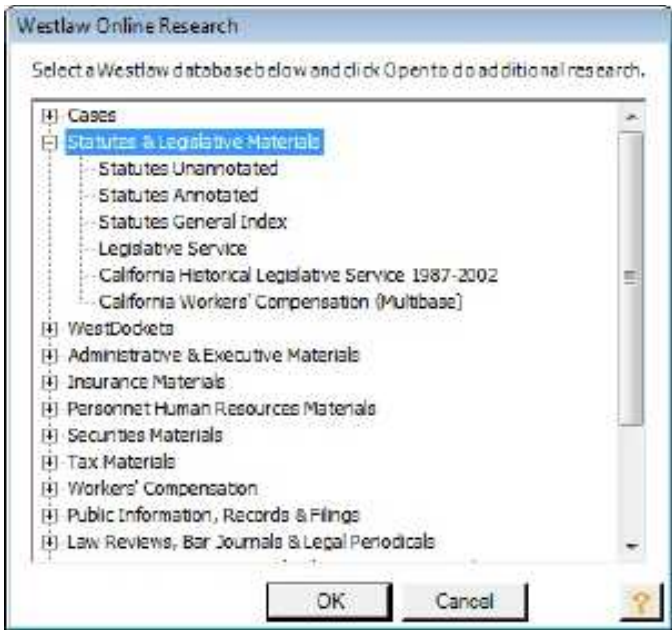
If this is the first time you have attempted to access Westlaw from within the program, an information message appears.



If you do not have access to Westlaw, be sure to call one of the telephone numbers in the message to request access. Click **OK** to dismiss the message.

NOTE: To keep this message from appearing in future, select the *In the future, do not show this message* check box. (If you decide later to turn this message back on, choose **Settings > Options**. On the **Options** window's **Alerts** tab, select the *Display access instructions before connecting to westlaw.com* check box.)

2. On the **Westlaw Online Research** window that opens, find the subject area you are interested in, and click  to expand it to see the resources it contains.



3. Select the material you want to view on Westlaw and click **Open**.
Your default web browser launches (if not already running) and opens the Westlaw Sign-on Page.
4. Follow your standard practice for signing onto and using Westlaw.
After you sign on, you will be directed to the relevant material in Westlaw.

View reference materials

For your convenience, Jury Instruction Selector includes reference materials that you can access at any time. Which reference materials are available for viewing depend on the type of case (civil or criminal). These reference materials are provided as PDF documents, viewable with a PDF reader such as Adobe Reader. To view any of these materials, use their corresponding commands on the References menu, such as **References > Tables > Life Expectancy Table**. Your default PDF reader starts up, and you can then view the document on screen or print it.

Table 2-5. Civil reference materials

References menu command	Reference
CA Rules of Court, Rules 2.1050, 2.1055	Amendments to the California Rules of Court specific to Rule 2.1050 (formerly Rule 855) and Rule 2.1055 (formerly Rule 229), effective January 1, 2007.
BAJI Appendices	The following appendices of the BAJI print version: <ul style="list-style-type: none">• Appendix C, "California Evidence Code"• Appendix D, "Special Verdicts"• Appendix E, "BAJI Master List"
CACI Preface	The following material from the CACI print version: <ul style="list-style-type: none">• Members list of the Judicial Council Task Force on Civil Jury Instructions• Publisher's Preface and Preface to CACI Updates• Guide for Using Judicial Council of California Civil Jury Instructions (CACI)• Westlaw Electronic Research Guide• Related Products from West• Table of derived, renumbered, replaced, and revoked instructions

References menu command		Reference
Tables	BAJI-CACI Conversion Table	Two tables listing CACI instructions and their directly corresponding and other related BAJI instructions and vice versa.
	CACI No. 1700 Tables	The following tables from CACI No. 1700: <ul style="list-style-type: none">• Table A, "Defamation Per Se"• Table B, "Defamation Per Quod"
	CACI No. 3100 Tables	The following table from CACI No. 3100: <ul style="list-style-type: none">• Table A, "Elder Abuse: Causes of Action, Remedies, and Employer Liability"
	CACI No. 3900 Tables	The following tables from CACI No. 3900: <ul style="list-style-type: none">• Worksheets A and B from CACI No. 3904B, "Use of Present Value Tables"
	Disposition Table	A blank Disposition Table form that may be printed for use when planning instructions to be included in an instruction set.
	Finding Aids	The BAJI and CACI Tables of Cases, Tables of Statutes, Key Digest Tables, and Indices.
	Life Expectancy Table	A table of life expectancies for individuals living in the U.S. beginning at specific age intervals and for specific populations. From the National Center for Health Statistics.
	Present Value Table	Tables of present values and compound discounts with which you can calculate a present value which, when invested at a specific rate of investment return, will pay at the end of each year a determined amount for a specific number of years.


Table 2-6. Criminal reference materials

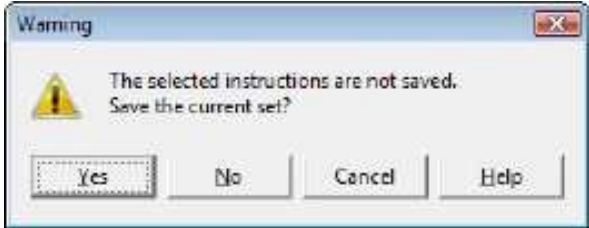
References menu command	Reference
CA Rules of Court, Rules 2.1050, 2.1055	Amendments to the California Rules of Court specific to Rule 2.1050 (formerly Rule 855) and Rule 2.1055 (formerly Rule 229), effective January 1, 2007.
CALJIC Appendices	The following appendices of the CALJIC print version: <ul style="list-style-type: none">• Appendix A, "Criminal Law – Sua Sponte Instructions"• Appendix B, "Reasonable Doubt – The California Experience"• Appendix C, "Lesser Offenses to the Offense Charged"• Appendix D, "The Birth, Life, and Death of Lesser Related Offenses"• Appendix E, "CALJIC Master List"
CALCRIM Preface	The following material from the CALCRIM print version: <ul style="list-style-type: none">• Members list of the Judicial Council Task Force on Civil Jury Instructions• Publisher's Preface and Preface to CALCRIM Updates• Guide for Using Judicial Council of California Criminal Jury Instructions (CALCRIM)• Westlaw Electronic Research Guide• Related Products from West

References menu command		Reference
Tables	CALJIC-CALCRIM Conversion Table	Two tables listing CALJIC instructions and their directly corresponding and other related CALCRIM instructions and vice versa.
	Disposition Table	A blank Disposition Table form that may be printed for use when planning instructions to be included in an instruction set.
	Finding Aids	The CALJIC and CALCRIM Tables of Cases, Tables of Statutes, and Indices, as well as the CALJIC Key Digest Tables.
	Life Expectancy Table	A table of life expectancies for individuals living in the U.S. beginning at specific age intervals and for specific populations. From the National Center for Health Statistics.

Exit Jury Instruction Selector

To exit Jury Instruction Selector

1. Choose **File > Exit**, or click  on the title bar.
If an instruction set is open and you have not yet saved recent changes, a warning message appears prompting you to save.



2. Respond appropriately to the warning.
The program exits.

CHAPTER 3. MANAGING INSTRUCTION FILES

This chapter focuses on managing instruction files (both instruction sets and instructions lists). It begins by defining the difference between instruction sets and instruction lists. It then offers step-by-step procedures for managing these sets and lists (starting new ones, opening existing ones, saving, and so forth).

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Save an instruction file under a different name	37
Save an instruction file of one type as the other type	37
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About instruction sets and instruction lists

You can save your instruction files in two formats:

- **Instruction set** – This file format (.jis) contains case-specific data (such as the names of persons and entities, dates, acts, and so forth), the collection of jury instructions that you select (thereby called *Selected Instructions*), and all of your customizations to those instructions. When you need to prepare jury instructions for a particular case, you will save your work in this format.
- **Instruction list** – This file format (.jil) does not include any case-specific data or any edits you may have made to instructions. Instead, it contains *only the Master versions* of those instructions. You might like to save an instruction set as an instruction list to use as a template.

An instruction set can be saved as an instruction list, and vice versa. But it is important to remember that if you save an instruction set as an instruction list, *all case-specific data and customizations will be lost*.


Unless otherwise noted, the term *instruction file* means either format.

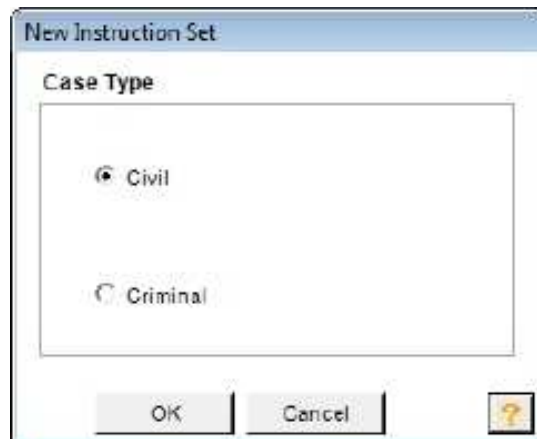
Create an instruction file

Use the *New* feature to create a new instruction file.

If an instruction file is already open, you don't have to close it first. If the open file has not yet been saved, you will be prompted to save it before a new file is started.

To start a new instruction file

1. Click  **New** on the main toolbar, or choose **File > New**.
The **New Instruction Set** window opens.



2. Select the type of case you will prepare jury instructions for and click **OK**.
The **Judicial Council of California Copyright Notice** window (not illustrated) opens.
3. If you prefer not to see the copyright notice in future, select the *In the future, do not show this message* check box and click **OK**.
A new instruction file has now been started. Notice that the type of case, such as "Criminal," appears in the application window's title bar and status bar.




The new instruction file is now ready for you to begin working with it. (Before continuing, you may want to save the new file. See "Save a new instruction file," below.)

Save a new instruction file



Use the *Save* feature to save a new instruction file, whether as an instruction set or instruction list.

To save a new instruction file

1. Click  **Save** on the main toolbar, or choose **File > Save**.
The **Save Instructions** window opens, listing previously saved instruction files. By default, the window assumes that you will save your file as an instruction set.



2. (Optional) Navigate to a different *Save in* location.
3. In the *File name* box, type a name for the instruction file.
4. From the *Save as type* drop-down list, select either *Instruction Set* or *Instruction List*, depending on the type you want.
5. Click **Save**.
6. If you elected to save the new file as an instruction list, a warning message appears. Click **Yes** to confirm.

TIP: Notice that the **Save** button on the toolbar is now "grayed out," as in , to indicate that the file has been saved. As soon as you change something in the file, the button will turn orange again, as in . By noting this color change, you can always see at a glance if you need to save your file.

Save an instruction file under a different name

Use the **File > Save As** command to save an instruction file under a different name while retaining the original instruction file.

To save an instruction file under a different name

1. Choose **File > Save As**.
The **Save Instruction Set** window opens, listing previously saved instruction sets. (This window is similar to the Save Instructions window.)
2. (Optional) Navigate to a different *Save in* location.
3. In the *File name* field, type a new name for the instruction file.
4. Click **Save**.

Save an instruction file of one type as the other type

Use the **File > Save As** command to save an instruction file of one type (e.g., instruction set) as the other type (e.g., instruction list). For example, saving an instruction set as an instruction list is useful

if you want to create a template for use in future cases.

IMPORTANT! When you save an instruction set as an instruction list, *all of the case-specific data will be discarded, as well as any edits you made to the text of Selected Instructions*. Instructions will revert to their original Master Instruction texts.

To save an instruction file of one type as the other type


1. Choose **File > Save As**.
The **Save Instruction Set** window opens, listing previously saved instruction sets. (This window is similar to the Save Instructions window.)
2. (Optional) Navigate to a different *Save in* location.
3. In the *File name* field, type a new name for the instruction file.
4. From the *Save as type* drop-down list, select either *Instruction Set* or *Instruction List*, depending on the type you want.
5. Click **Save**.
6. If you elected to save as an instruction list, a warning message appears. Click **Yes** to confirm.

Open an instruction file

Use the *Open* feature to open an instruction file.

If another instruction file is already open, you don't have to close it first. If the open file has not yet been saved, you will be prompted if you want to save it before opening another file.

To open an instruction file

1. Click  **Open** on the main toolbar, or choose **File > Open**.
The Open Instructions window opens, listing previously saved instruction sets and lists.



2. If there are many files, you may prefer to filter the list to show files of one type only. From the *Files of type* drop-down list, select *Instruction Sets* or *Instruction Lists*.
3. Select the desired file and click **Open**.


NOTES:

- (1) If the instruction set had been saved before any instructions were selected for it, the message "No instructions exist in the file" opens. Click **OK** to dismiss the message.
- (2) If you use Jury Instruction Selector on a network, it is possible that another user may have already opened the file. In that case, a warning will alert you that the file is already in use. If you continue to open the file, it will be read-only.
- (3) If the official versions of any Selected Instructions were updated since the last time the file was opened, a warning will alert you that there are out-of-date instructions. To update the instructions, click **OK** and then proceed to the **Jury Instructions** tab's **Master Instructions** page. You will need to deselect and reselect the instructions, and you may need to re-edit the instructions as needed. For more information, see the FAQ "Why do I get a message saying that instructions are out-of-date?" in the Help system.

Close an instruction file

Use the *Close* feature to close an instruction file.


To close an instruction file

1. Click  **Close** on the main toolbar, or choose **File > Close**.
If you have made changes to the instruction file but have not yet saved them, a warning message appears.
2. Respond appropriately to the warning.
The file closes.

Delete an instruction file

There is no "delete a file" feature in Jury Instruction Selector per se. However, you can easily delete an instruction file either directly from Windows Explorer or right from within the program (as described below).

To delete an instruction file

1. If the instruction file you want to delete is currently open, close it before proceeding.
2. Click  **Open** on the main toolbar, or choose **File > Open**.
The **Open Instructions** window opens, listing previously saved instruction files.
3. If there are many files, you may prefer to filter the list to show files of one type only. From the *Files of type* drop-down list, select *Instruction Sets* or *Instruction Lists*.
4. Right-click the file you want to delete and choose **Delete**.
5. In response to the confirmation message, click **Yes**.
6. Click **Cancel** to close the window.

CHAPTER 4. WORKING WITH CASE INFORMATION

This chapter explains how to set up the information that is specific to a case, such as the presiding court, the attorney, the parties, acts, dates, locations, and so forth. Later, you can auto-populate your Selected Instructions with this information.

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About case information

Case information consists of all the persons, entities, actions, dates, locations, and other information that is specific to the case for which you are creating jury instructions. To set up case information, you work on the program's **Case Information** tab.

Typically you define case information when you start a new instruction set, but you can also edit and add case information at any time before printing the completed set of instructions. In fact, you're likely to add more case information as instructions are added to the instruction set.

Case Information tab

You manage case information on the aptly named **Case Information** tab. Along its left panel, the tab is divided into pages, such as **Court & Attorney**, **Parties**, and **Acts**. Just click a heading to switch to the page you want to work with.

Figure 4-1. *Case Information tab, opened at its Court & Attorney page*

NOTE: Periodically save your instruction file as you work.

Court & Attorney page

Use the **Court & Attorney** page of the **Case Information** tab to set up information about the court presiding over the case and the attorney handling the case. This information will be used to auto-populate applicable Selected Instructions in the open instruction set.

Table 4-1. *Court fields*


Field	Description
Case name	Enter the name of the case for which you are preparing jury instructions.
Case number	Enter the identifying number of the case for which you are preparing jury instructions.
Trial date	Enter the trial date, or click  to open a popup calendar from which you can select a date. The default is today's date.
Judge name	Enter the name of the judge presiding over the case.
District and Court	The district and court where the case is being heard. To enter these items, click District and Court to open and complete the Edit District and Court window (not illustrated).
Department	Type the department handling the case.
Use Division Title	Select this check box to use the division title rather than the department title.

Table 4-2. Attorney fields

Field	Description
Attorney name	Enter the name of the attorney handling the case.
Firm name	Enter the name of the attorney's firm.
Bar number	Enter the attorney's bar number.
Address	The attorney's address. To enter this address, click Address to open and complete the Edit Address window (not illustrated).
Telephone	Enter the attorney's telephone number.
Fax	Enter the attorney's fax number.
Email	Enter the attorney's email address.
Party type	From this drop-down list, select the party that the attorney is representing, such as Plaintiff or Defendant for a civil case or People or Defendant for a criminal case.

Set up the court and attorney

To identify the court and attorney information

1. On the **Case Information** tab, go to the **Court & Attorney** page.
2. In the *Court* section, complete the fields as needed. (See Table 4-1.)
3. In the *Attorney* section, complete the fields as needed. (See Table 4-2.)

Parties page

Use the **Parties** page of the **Case Information** tab to manage information about the persons and/or entities who are parties in the case. This information will be used to auto-populate applicable Selected Instructions in the open instruction set.

Each party has an assigned role in the case, such as Defendant or Plaintiff, or some other applicable role such as Expert, Accomplice, or Employer.

From the **Parties** page, you can add parties, edit parties (including changing their roles), and remove parties.

Although you might add most of the information about parties when you first begin working on an instruction set, you can add parties at any time. In fact, you are likely to add parties gradually as more jury instructions are selected.

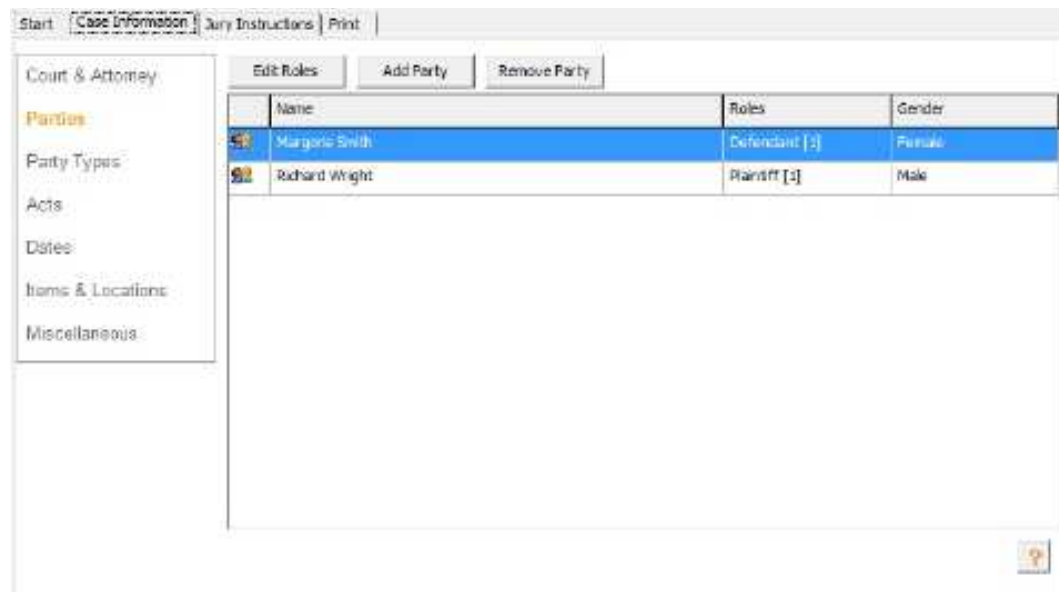
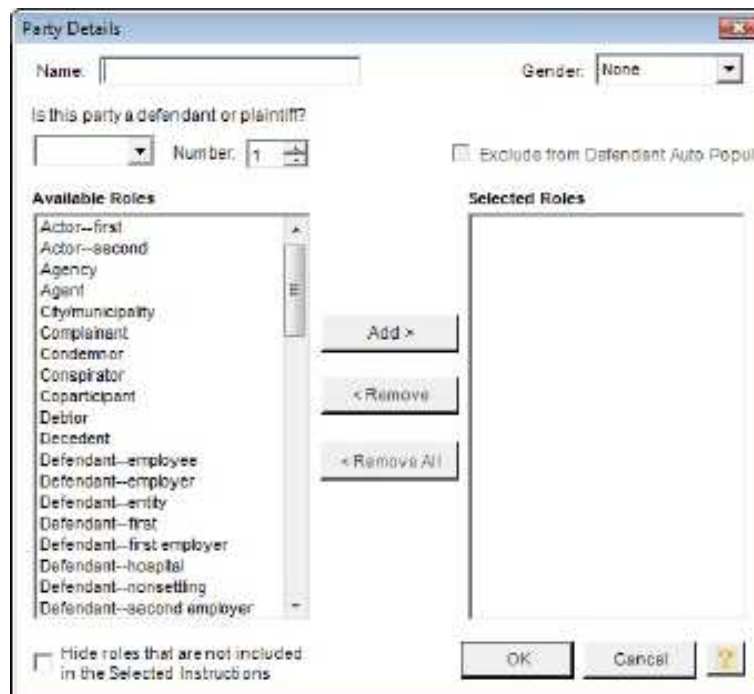


Figure 4-2. *Case Information > Parties page*

Set up the parties

To add a party to the case

1. On the **Case Information** tab, go to the **Parties** page.
2. Click **Add Party** to open the **Party Details** window.



3. If adding a defendant or plaintiff, do the following:
 - a. Enter the party's name, select the appropriate gender, select the party's type (e.g., Defendant, Plaintiff), and the party's number (e.g., 1, as in Defendant 1).
 - b. If you plan to exclude this party's information when you later auto-populate jury instructions, select the *Exclude in Defendant/Plaintiff Auto-Populate* check box.

BEST PRACTICE: Why might you want to exclude a party's information from the *Auto-Populate* feature? Assume a case involving an employer and employee in which both are defendants, but the first person is to be referred to as "defendant" and the second person as "employee." In this situation, you would want to exclude the

employee's information when auto-populating instructions. But then assume you later selected a new instruction in which both the employee and employer are to be referred to jointly as "defendants," with both names appearing together. In this situation, you would come back to the employee's party details, clear the *Exclude* check box, and then auto-populate the new instruction.

4. If adding any other kind of party (e.g., Expert, Accomplice, Employer) do the following:
 - a. Enter the party's name and select the appropriate gender.
 - b. From the *Available Roles* list, select an appropriate role(s) for this party and click **Add>**. (To select multiple roles, use **Shift+click** and **Ctrl+Click**.)

NOTE: The roles listed will vary depending on the type of case (civil or criminal).

5. Click **OK** to save and close.
The party is now listed on the **Parties** page.

To edit a party

1. On the **Case Information** tab, open the **Parties** page.
2. Select the party you want to edit and click **Edit Roles**.
3. On the **Party Details** window, edit the fields and/or change the party's role(s), as needed. For example, to remove (unassign) a role, select it on the *Selected Roles* list and click **<Remove**.
4. Click **OK** to save and close.

To remove a party from the case

1. On the **Case Information** tab, open the **Parties** page.
2. Select the party you want to remove and click **Remove Party**.
3. Click **OK** to confirm.

Party Types page

Use the **Party Types** page of the **Case Information** tab to enter general descriptions of parties (such as "attorney" or "registered nurse") or official titles or job descriptions (such as "Police Officer") that you will use in instructions. This information will be used to auto-populate applicable Selected Instructions in the open instruction set.

NOTE: The fields will vary depending on the type of case (civil or criminal).

Start Case Information Jury Instructions Print

Court & Attorney
Parties
Party Types
Acts
Dates
Items & Locations
Miscellaneous

Entity-type:
Health-care provider-type:
Occupation/professional:
Officer-title:
Officer-type:
Service provider:

highlight fields that are included in the Selected Instructions

Click a field's label to see exactly which Selected Instructions the field appears in.

Click to see which fields need to be completed for the Selected Instructions.

Figure 4-3. *Case Information > Party Types page*

Set up party types

To set up party types

1. On the **Case Information** tab, go to the **Party Types** page.
2. Complete the necessary fields. (Click *Highlight fields that are included in the Selected Instructions* to see which fields need to be completed.) Leave blank any party type that does not apply to the case.

Acts page

Use the **Acts** page of the **Case Information** tab to identify the acts and/or crimes that are pertinent to the case. This information will be used to auto-populate applicable Selected Instructions in the open instruction set. If an act is not applicable to the case, leave its field blank.

NOTE: The fields will vary depending on the type of case (civil or criminal).

Figure 4-4. *Case Information > Acts page*

Set up acts

To set up act information

1. On the **Case Information** tab, go to the **Acts** page.
2. Complete the necessary fields. (Click *Highlight fields that are included in the Selected Instructions* to see which fields need to be completed.) Leave blank any act that does not apply to the case.

Dates page

Use the **Dates** page of the **Case Information** tab to identify dates that are pertinent to the case. This information will be used to auto-populate applicable Selected Instructions in the open instruction set. If a date is not applicable to the case, leave its field blank. Also be sure to use the date format required by the court.

NOTE: The fields will vary depending on the type of case (civil or criminal).

The screenshot shows the 'Case Information' tab with the 'Dates' sub-tab selected. On the left is a sidebar menu with options: Court & Attorney, Parties, Party Types, Acts, Dates (highlighted), Items & Locations, and Miscellaneous. Below this menu is a button labeled 'highlight fields that are included in the Selected Instructions'. The main area contains a 'Date:' label and five input fields for 'Date of accident:', 'Date of death:', 'Date of filing:', and 'Date of valuation:'. Two yellow callout boxes are present: one pointing to the 'Date:' label with the text 'Click a field's label to see exactly which Selected Instructions the field appears in.', and another pointing to the 'highlight fields...' button with the text 'Click to see which fields need to be completed for the Selected Instructions.'.

Figure 4-5. Case Information > Dates page

Set up dates

To set up dates

1. On the **Case Information** tab, go to the **Dates** page.
2. Complete the necessary fields. (Click *Highlight fields that are included in the Selected Instructions* to see which fields need to be completed.) Use the date format required by the court. Leave blank any date that does not apply to the case.

Items & Locations page

Use the **Items & Locations** page of the **Case Information** tab to identify any items and locations that are pertinent to the case. This information will be used to auto-populate applicable Selected Instructions in the open instruction set. If an item or location is not applicable to the case, leave its field blank.

NOTE: The fields will vary depending on the type of case (civil or criminal).

The screenshot shows the 'Case Information' tab with the 'Items & Locations' sub-tab selected. The left sidebar contains a list of categories: Court & Attorney, Parties, Party Types, Acts, Dates, **Items & Locations** (highlighted), and Miscellaneous. Below this is a link: 'highlight fields that are included in the Selected Instructions >'. The main area contains a list of fields: Animal, Goods, Item, Location, Object/things, Product/crop, Property-personal, Property-public, Property-real, and Street. To the right of these fields are input boxes. Further right are 'Typing item/product:' and 'Vehicle:' with their respective input boxes. Two yellow callout boxes provide instructions: one points to the 'Animal' field label with the text 'Click a field's label to see exactly which Selected Instructions the field appears in.', and the other points to the 'highlight fields...' link with the text 'Click to see which fields need to be completed for the Selected Instructions.'.

Figure 4-6. *Case Information > Items & Locations page*

Set up items and locations

To set up information about items and locations

1. On the **Case Information** tab, go to the **Items & Locations** page.
2. Complete the necessary fields. (Click *Highlight fields that are included in the Selected Instructions* to see which fields need to be completed.) Leave blank any item or location that does not apply to the case.

Miscellaneous page

Use the **Miscellaneous** page of the **Case Information** tab to define any remaining, miscellaneous information needed for the case (e.g., an amount [usually but not always monetary], a description of damages, a description of a health condition, a status or class, and so forth). This information will be used to auto-populate applicable Selected Instructions in the open instruction set.

NOTE: The fields will vary depending on the type of case (civil or criminal).

The screenshot shows the 'Miscellaneous' page within the 'Case Information' tab. The page has a sidebar on the left with a list of categories: Court & Attorney, Parties, Party Types, Acts, Dates, Items & Locations, and Miscellaneous (which is highlighted). Below the sidebar is a button labeled 'Highlight fields that are included in the Selected Instructions'. The main area contains a list of fields: Amount, Characteristic/trait, Code/statute reference, Condition, Damages, Duty, Health condition, Medical procedure/treatment, Status/class, and Status/class-group. Each field has a corresponding text input box. Two yellow callout boxes provide instructions: one points to the 'Amount' field label with the text 'Click a field's label to see exactly which Selected Instructions the field appears in.', and the other points to the 'Highlight fields...' button with the text 'Click to see which fields need to be completed for the Selected Instructions.'.

Figure 4-7. *Case Information > Miscellaneous page*

Set up miscellaneous information

To set up miscellaneous information

1. On the **Case Information** tab, go to the **Items & Locations** page.
2. Complete the necessary fields. (Click *Highlight fields that are included in the Selected Instructions* to see which fields need to be completed.) Leave blank any item or location that does not apply to the case.

Look up where case information is used in Selected Instructions

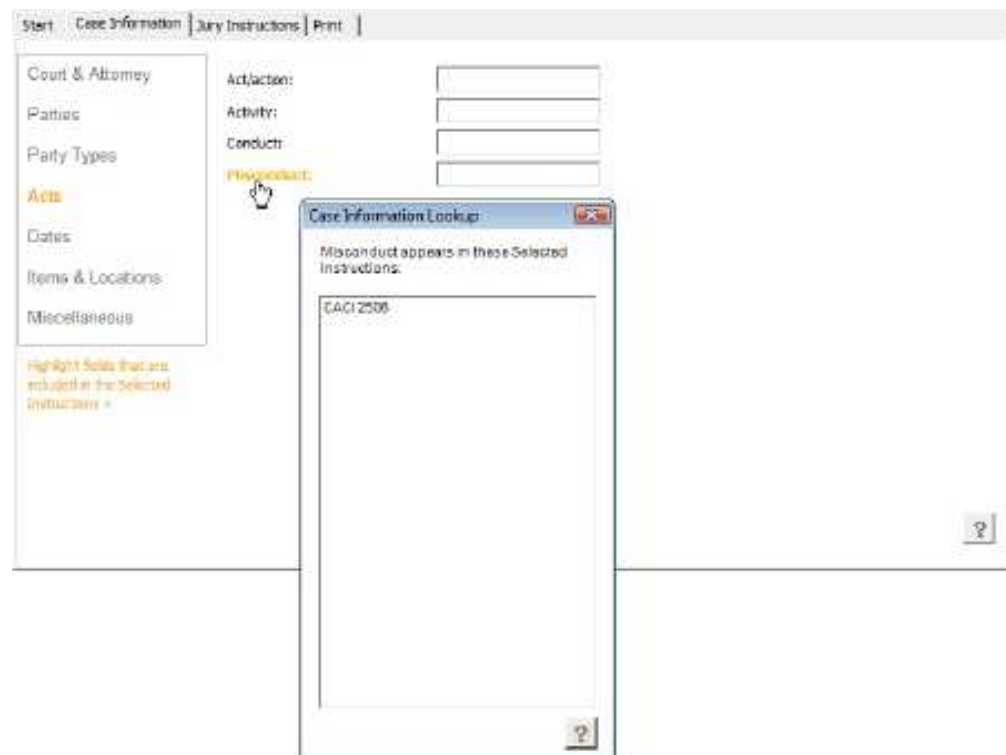
With the *Case Information Lookup* feature, you can quickly look up the list of Selected Instructions in which a particular auto-populate field is used. This feature is available on the **Case Information** tab's **Party Types, Acts, Dates, Items & Locations, and Miscellaneous** pages.

TIP: Before using the *Lookup* feature, turn on the highlighting to see which fields are used somewhere in your Selected Instructions. Do so by clicking the Highlight fields that are included in the Selected Instructions>> link beneath the page headings at the left of the **Case Information** tab. The labels that now appear in bold orange letters indicate those fields that are used somewhere Selected Instructions. Then use the *Lookup* feature to see exactly where.

To look up where case information is used

- On the page of the **Case Information** tab where the field is shown, click the field's label (not its text box).

The **Case Information Lookup** window opens, listing the instructions where the field is used.



CHAPTER 5. WORKING WITH JURY INSTRUCTIONS

This chapter focuses on working with instructions. It includes procedures for viewing the text and Commentary of Master Instructions, for finding specific instructions, for selecting instructions for inclusion in an instruction set, and for editing instructions in various ways. (This chapter does not cover how to create Personal Instructions; see instead Chapter 7.)

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 - Auto-populate individual Selected Instructions 66
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About Master, Personal, and Selected Instructions

There are three types of jury instructions in Jury Instruction Selector:

- *Master Instructions* – The jury instructions provided with their official language and stored in the program's database. You cannot edit them or remove them from the program. Many Master Instructions include replaceable fields (called brackets and blanks) intended to be populated with case-specific information. All Master Instructions have accompanying Commentaries that provide authority and can help you decide whether or not to select them for inclusion in an instruction file.
- *Personal Instructions* – Custom instructions that can be selected for inclusion in an instruction file.

NOTE: This chapter discusses only how to use Personal Instructions as you would a Master Instruction. For information on creating Personal Instructions, see Chapter 7.

- *Selected Instructions* – The instructions that you have selected from the Master Instructions and Personal Instructions for inclusion in the instruction file. It is this set of instructions that will be handed out to the jury, after review and comment by the opposing attorneys and the court. You can freely edit the Selected Instructions as the attorneys and court request, and you can auto-populate the instructions' replaceable fields with case information.

Jury Instructions tab

You work with instructions on the **Jury Instructions** tab (Figure 5-1). Along its left panel, the tab is divided into pages, such as **Master Instructions**, **Personal Instructions**, and **Selected Instructions**. Just click a heading to go to the page you want to work with.

NOTE: Periodically save your instruction file as you work.

Master Instructions page

The **Jury Instructions** tab's **Master Instructions** page gives you access to the full set of Master Instructions in Jury Instruction Selector. On this page, you will select instructions for inclusion in your instruction file.

Requested	Type	Instruction	Description Header	Print Date
<input checked="" type="checkbox"/>	CACI	100	PRELIMINARY ADDITIONS	12/2007
<input checked="" type="checkbox"/>	CACI	101	OVERVIEW OF TRIAL	2/2007
<input checked="" type="checkbox"/>	CACI	102	TAKING NOTES DURING THE TRIAL	12/2007
<input type="checkbox"/>	CACI	103	MULTIPLE PARTIES	4/2009
<input type="checkbox"/>	CACI	104	NON-PERSON PARTY	9/2003
<input type="checkbox"/>	CACI	105	INSURANCE	9/2005
<input checked="" type="checkbox"/>	CACI	106	EVIDENCE	2/2005
<input checked="" type="checkbox"/>	CACI	107	WITNESSES	4/2007
<input checked="" type="checkbox"/>	CACI	108	DUTY TO ABIDE BY TRANSLATION PROVIDED IN COURT	4/2004
<input type="checkbox"/>	CACI	109	REMOVAL OF CLAIMS OR PARTIES	9/2003
<input type="checkbox"/>	CACI	110	SERIAL PROVIDER FOR JURY WITH DISABILITY	9/2003

Figure 5-1. Master Instructions page of the Jury Instructions tab

Personal Instructions page

From the **Jury Instructions** tab's **Personal Instructions** page, you will select user-defined instructions known as Personal Instructions for inclusion in your instruction file, exactly as you would a Master Instruction. From here you can also add, edit, and delete Personal Instructions. (Creating Personal Instructions is not covered in this chapter; instead, see Chapter 7.)

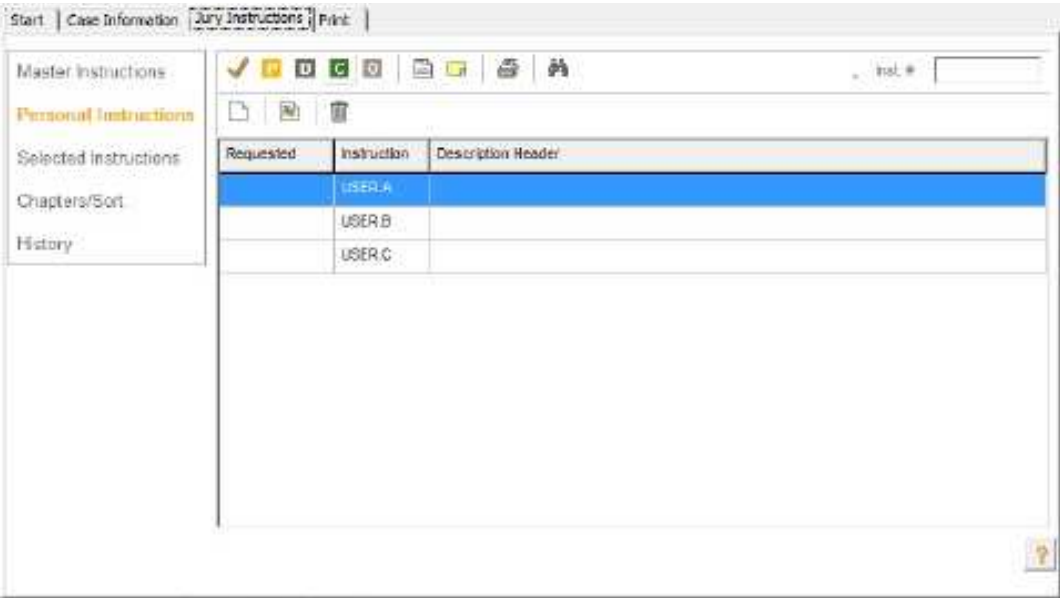


Figure 5-2. *Jury Instructions > Personal Instructions page*

Selected Instructions page

The **Jury Instructions** tab's **Selected Instructions** page lists only those Master Instructions and Personal Instructions that have been selected for inclusion in your instruction file. From this page, you will access features for editing the Selected Instructions for the case for which you are preparing jury instructions.

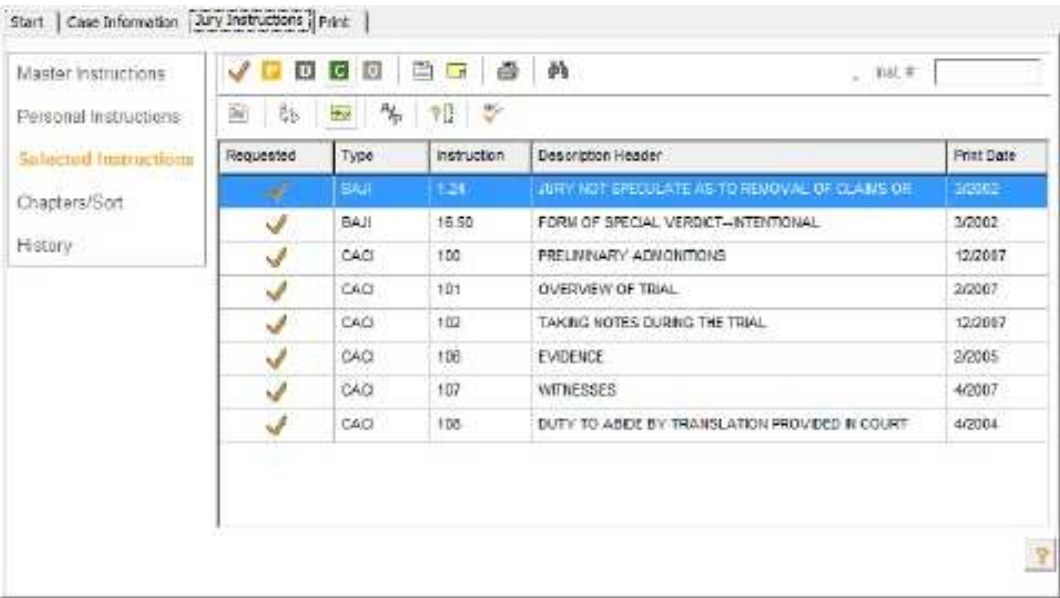


Figure 5-3. *Jury Instructions > Selected Instructions page*

Chapters/Sort page

The **Jury Instructions** tab's **Chapters/Sort** page offers features for fine-tuning the order in which your Selected Instructions will print. (In fact, the order of instructions on this page controls the order in which instructions are listed on the **Print** tab's **Choose Instructions** page.)

If you will be printing your instructions in Booklet format, you can also use the **Chapters/Sort** page to edit the titles of chapters for the particular case you're working on, in effect, overriding the chapter defaults. (If you will not be using the Booklet format, you can ignore the chapter titles.)

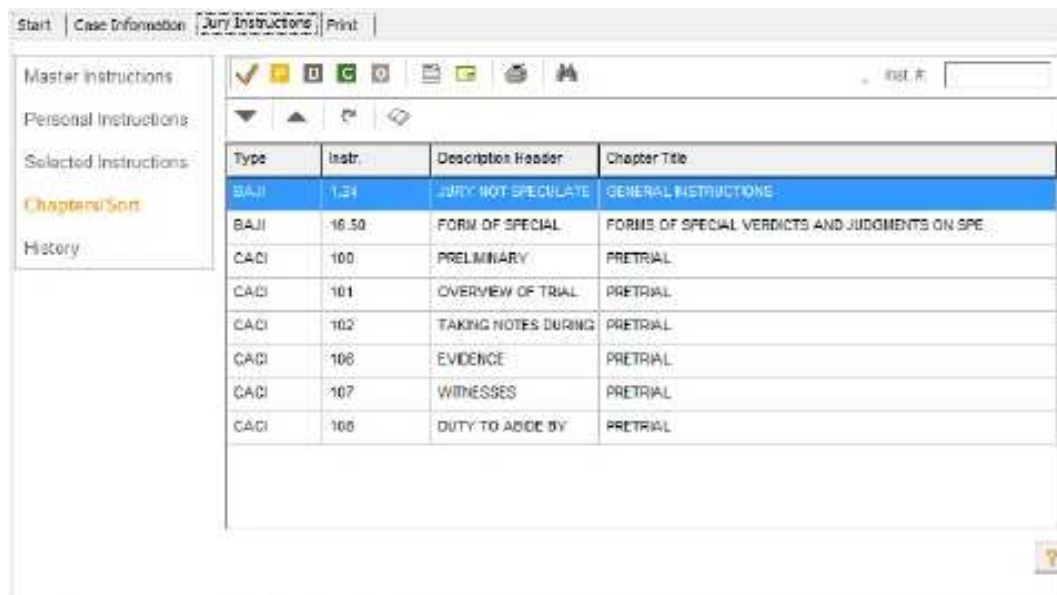


Figure 5-4. *Jury Instructions > Chapters/Sort page*

History page

The **Jury Instructions** tab's **History** page is used to manage the Requested-By Flags and Status flags of Selected Instructions. To set a flag, you can simply right-click an instruction on the list and choose the desired flag on the shortcut menu.

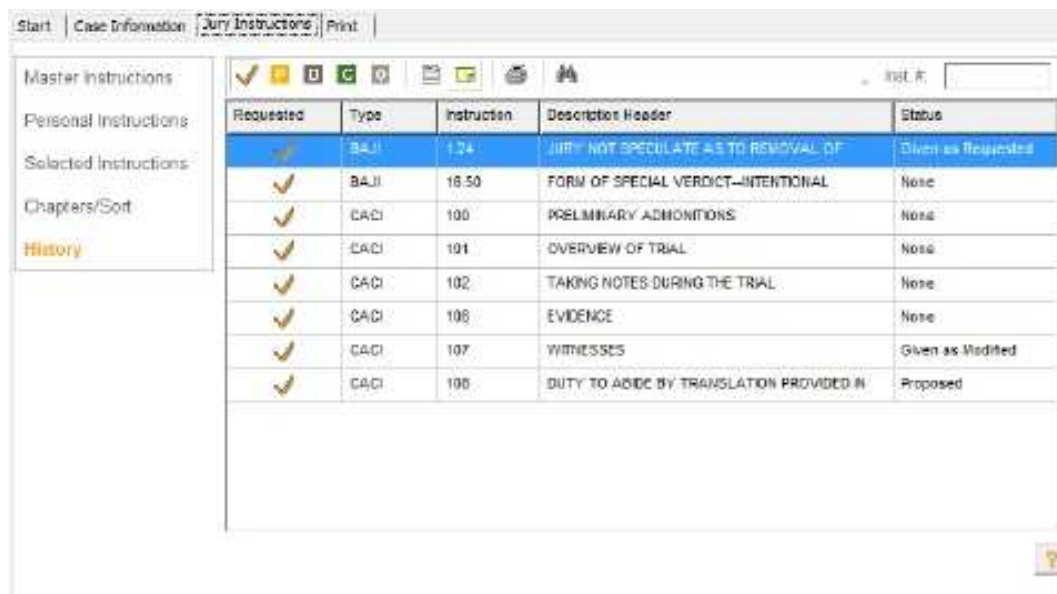


Figure 5-5. *Jury Instructions > History page*

Search for and within instructions

Jury Instruction Selector offers several methods for searching for and within instructions: jumping to the first instruction of a certain type (on the Master Instructions tab only), searching by instruction number, and searching for text within instructions.

Search by instruction number

Use the **Jury Instructions** tab's *Inst. #* box when you know the number of the instruction you seek. Starting at the beginning of its database of instructions, the program jumps to the first instruction whose number matches your entry.

NOTE: In the program's database, the first set of instructions is the BAJI instructions. When the program searches for an instruction by number, it begins with the BAJI instructions, regardless of which set of instructions you may have elected to always be listed first on-screen.



Figure 5-6. *Inst. #* box and a matching instruction

Jump to the first Master Instruction of a certain type

As you work on the **Jury Instructions** tab's **Master Instructions** page to select jury instructions, you might find it convenient to quickly go to Master Instructions of a certain type (e.g., BAJI or CACL).

You can do so easily with the *Go to* drop-down list. Just select from the list the type of jury instructions you are interested in. The program will jump to the first instruction of that type.

NOTE: If you want Jury Instruction Selector to always list instructions of a certain type first, set the *Choose which set of instructions to display first* option as you prefer on the **Options** window's **Display** tab. See "Set display options," page 22.



Figure 5-7. *Go to* drop-down list

Search for text

Use the *Search* feature to search for text in Master Instructions or their Commentaries. This is a quick way to find Master Instructions that are pertinent to the case whose jury instructions you are preparing.

The *Search* feature finds only exact matches of your search text. Endings (e.g., "ing," "ly," "es") are not considered. You might find it useful to conduct multiple searches seeking various endings.

To search for text in Master Instructions and their Commentaries

1. Click  **Search** on the **Jury Instructions** tab's toolbar, or choose **Tools > Search**. The **Search** window opens.



2. In the *Search for terms* box, type the word or phrase you want to find. To find an exact phrase, such as "dog bite," frame it with quotation marks.
3. Select the applicable *Search in* option: *Instructions*, *Commentaries*, or *Both*.
4. Click **Search**.

The program searches in and lists those Master Instructions and/or Commentaries that contain the exact matches of your search terms. Notice that the search results are ranked by their relevance. The 100% relevance indicates that the search term matched exactly; lower percentages indicate that the exact search terms were not found. The higher the relevancy percentage, the more likely you are to find the information you seek in an instruction.

NOTE: If you search for common text that results in many matches, such as the word "the," a message appears indicating that only the top 100 matches will be shown. If more than 100 matches exist, an information message appears to inform you that there are "too many solutions."

5. You can now do any of the following with a match you select on the list:
 - Click **Select Instruction** to include this instruction in the instruction set. In response to the confirmation message, click **OK**.



NOTE: If the **Select Instruction** button is not enabled, the instruction is already included in the instruction set.

- Click **View Instruction** to view the instruction's text. (You can't edit the instruction here because you are actually viewing the Master Instruction.)
 - Click **View Commentary** to view the instruction's Commentary.
6. When finished with searching, click **Close** on the **Search** window.

View the text of a Master Instruction

At any time, you can view the text of a Master Instruction (Figure 5-8) to review its relevance to the case. You especially might want to do so before deciding to select it for inclusion in your instruction file. (For the same reasons, also view its Commentary; see "View a Commentary," next page.)

To open a Master Instruction

- On any page of the **Jury Instructions** tab where the instruction you are interested in is listed:
 - Right-click its row and choose **View Instruction** on the shortcut menu.
 - Highlight the row and click  **View Instruction** on the tab toolbar.
 - Highlight the row and choose **Instruction > View Instruction**.
- On any window (such as the **Edit** window) where the  **View Instruction** button is available, click it.

The Master Instruction opens in the **View Instruction** window.

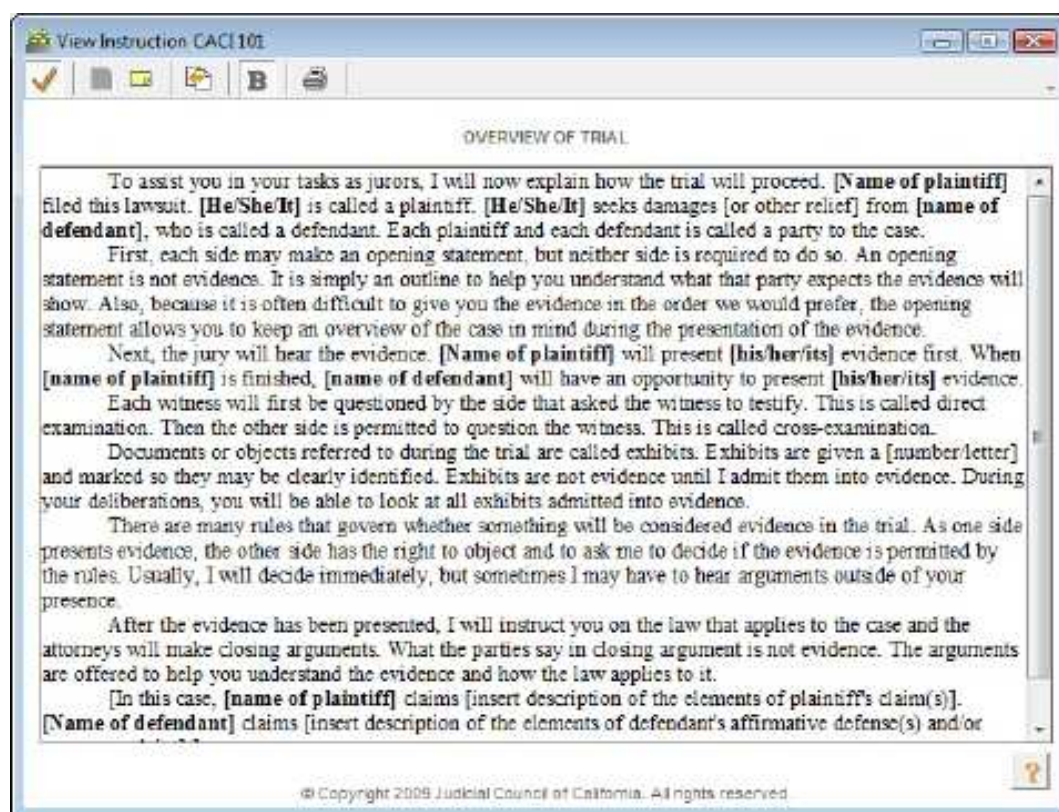



Figure 5-8. A Master Instruction opened in the View Instruction window

By default, a Master Instruction appears with its auto-populate fields (those bracketed text and blanks that can be replaced with case information) shown in **bold**. (To toggle the bolding on and off, click  **Bold Case Info** on the window's toolbar.) You can see which case information field is tied to a particular auto-populate field by right-clicking the field to open a preview balloon (Figure 5-9). Click **OK** to close the balloon.

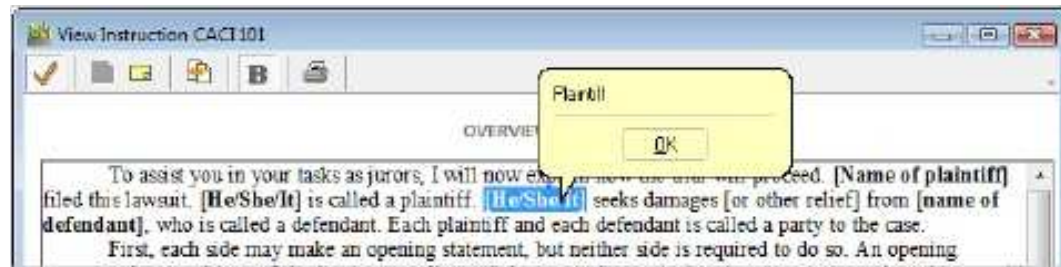


Figure 5-9. Auto-populate preview balloon showing which case information field is tied to an auto-populate field

From the **View Instruction** window, you can also print the text of the Master Instruction and select and copy some or all of the text in order to paste it somewhere else. However, you cannot edit the text of a Master Instruction.



View a Commentary

A Master Instruction's *Commentary* (Figure 5-10) offers general discussion and guidance explaining how to use that particular instruction, as well as (for most instructions), sources and authority. All Master Instructions have Commentaries. Reading through an instruction's Commentary can help you decide whether to select the instruction for inclusion in your instruction file. A Commentary can even help you decide how to edit it for the case you are working on.

Many Commentaries include editorial reference links to related jury instructions.

NOTE: While editing a Selected Instruction, you can append Commentary text to the instruction. (See "Add authorities to Selected Instructions," page 71.)

To view a Commentary

- On any page of the **Jury Instructions** tab where the instruction you are interested in is listed:
 - Right-click its row and choose **View Commentary** on the shortcut menu.
 - Highlight the row and click  **View Commentary** on the tab toolbar.
 - Highlight the row and choose **Instruction > View Commentary**.
- On any window (such as the **Edit** window) where the  **View Commentary** button is available, click it.

The Commentary opens in the **View Commentary** window.

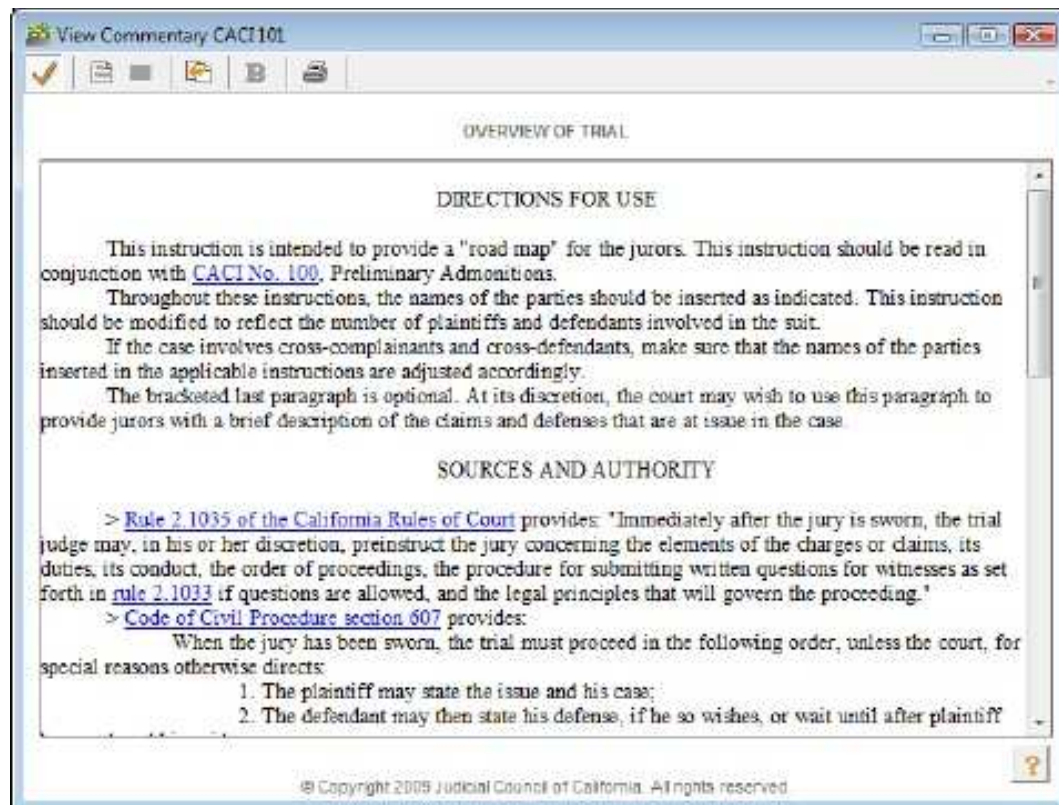


Figure 5-10. A Master Instruction's Commentary in the View Commentary window

Select and edit instructions for your instruction file


This section explains how to select instructions for your instruction file and edit them as needed.

NOTE: Periodically save your instruction file as you work.

Select an instruction

You can easily select a Master Instruction or Personal Instruction for inclusion in your instruction file, thereby making it a Selected Instruction. Once you've selected it, you are then free to edit it as needed for the case.


To select an instruction for inclusion in your instruction file

1. Working on the **Jury Instructions** tab's **Master Instructions** page or **Personal Instructions** page, find the instruction you want to select for your instruction file.
2. To select the instruction, click anywhere on its row or click  **Select/Deselect Instruction** on the tab toolbar.
A check mark appears in the *Requested* column of the instruction's row.

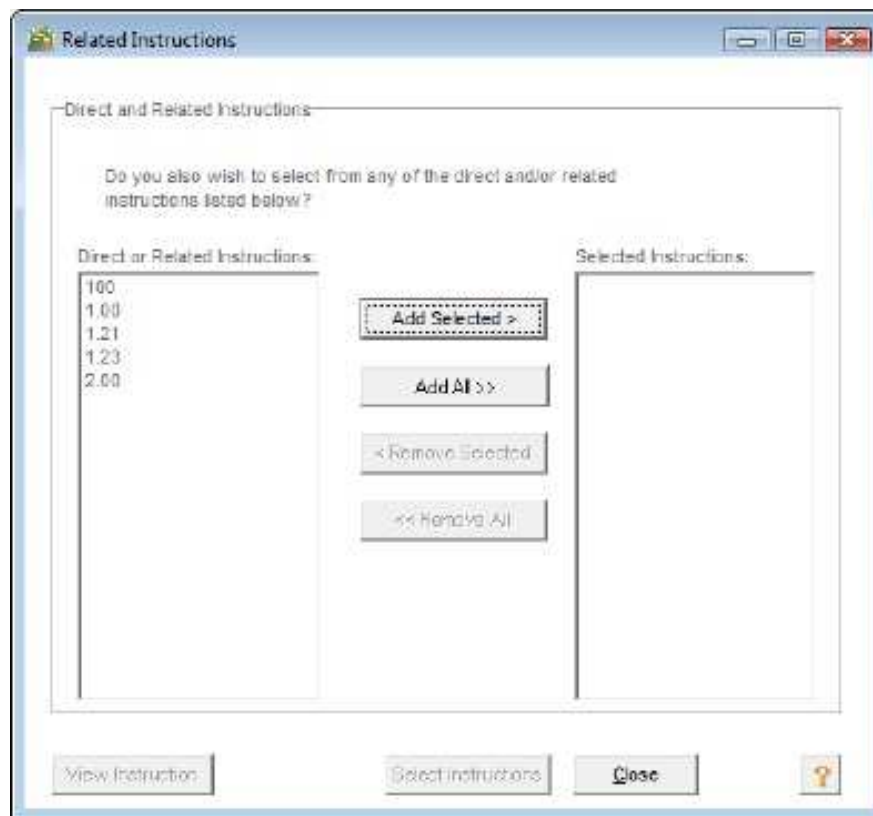
Select related instructions

While viewing a Master Instruction's text or its Commentary, you can easily select instructions that are related to it to add to your instruction file.

To select instructions related to the open instruction

1. View the Master Instruction (see page 59) or view its Commentary (see previous page).
2. On the **View Instruction** or **View Commentary** window, click  **Related Instructions**.
The **Related Instructions** window opens, listing all the instructions related to the Master

Instruction.



3. From the *Direct or Related Instructions* list, select one or more instructions. (To select multiple instructions, use **Shift+click** or **Ctrl+click**.) Then click **Add Selected>**. If you want to add all of the instructions, click **Add All>>**.


NOTE: You can view the text of instructions, one at a time, by selecting an instruction and clicking **View Instruction**.

4. When ready to add the selected instructions to your instruction file, click **Select Instructions**.

Import Selected Instructions from another instruction file

There may be times when you would like to import Selected Instructions from another instruction file of the same case type (e.g., civil or criminal). You can import instructions from files created with Version 4.0 and later of Jury Instruction Selector.

To import instructions

1. Open the instruction file (see page 38) into which you want to import Selected Instructions from another instruction file.
2. Click  **Import Instructions** on the main toolbar, or choose **File > Import Instructions**. The **Open Instructions window** opens.
3. Navigate to and select the file from which you want to import and click **Open**. The **Import Instructions** window opens.



4. Select where to place the imported instructions in relation to the currently selected instructions and click **OK**.
 - *Combine* places the imported instructions within the existing instructions in numerical order.
 - *Insert at beginning* adds the imported instructions to the beginning of the instructions.
 - *Append at end* adds the imported instructions to the end of the instructions.
5. In response to the confirmation message, click **OK**.
6. If an imported instruction duplicates an existing instruction in the destination instruction set, a confirmation message appears, prompting if you want to retain the existing instruction.
 - To retain the existing instruction (thereby skipping the imported instruction), click **Yes**.
 - To replace the existing instruction with the imported instruction, click **No**.

The instructions are imported, which you can view on the **Jury Instructions** tab's **Selected Instructions** page.

Open a Selected Instruction for editing

In order to edit a Selected Instruction, such as to auto-populate it with case information, check its spelling, or convert it to a verdict, you must open it in the **Edit** window. That window is accessible only from the **Jury Instruction** tab's **Selected Instructions** page.

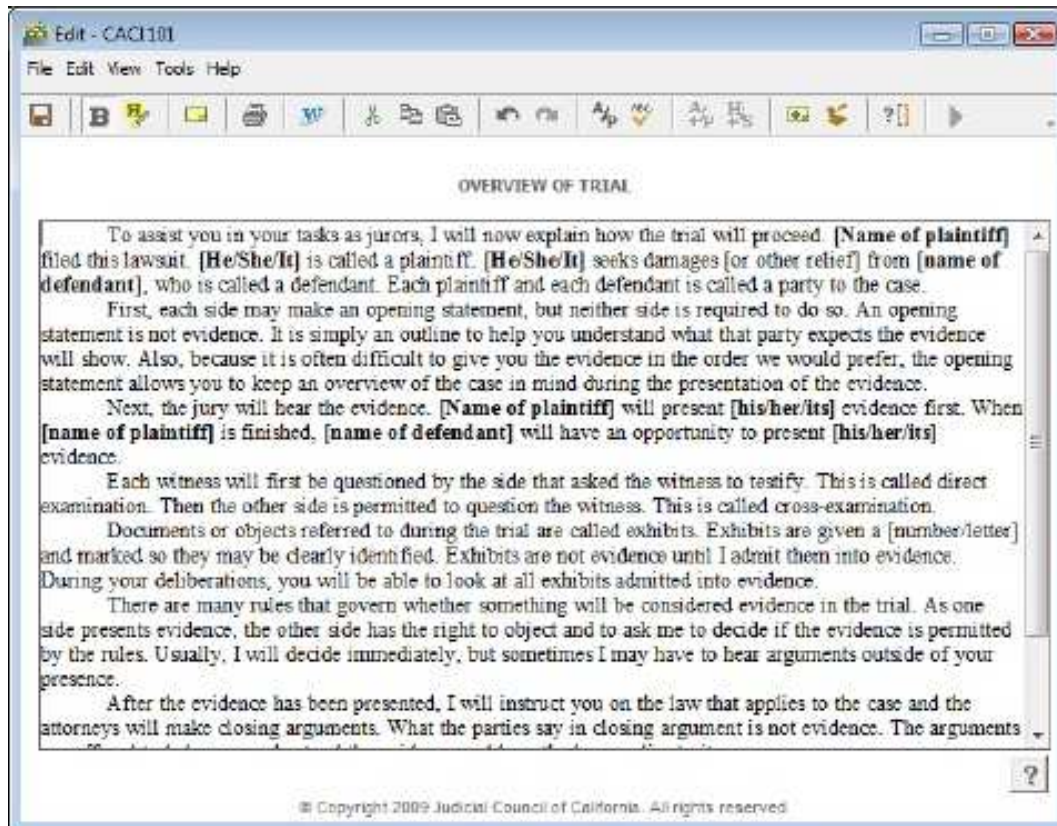



Figure 5-11. *Edit window, showing a Selected Instruction ready for editing*

To open a Selected Instruction for editing

1. On the **Jury Instructions** tab's **Selected Instructions** page, find the instruction you want to open for editing.
2. Do either of the following:
 - Double-click anywhere on the instruction's row.
 - Highlight (click once on) the instruction's row and click  **Edit Instruction** on the page toolbar or choose **Instruction > Edit**.

The **Edit** window opens showing the instruction's text.

Once you have opened a Selected Instruction, you can easily edit it as you would using a text editor or basic word processor. For example, you can place the insertion marker where you want to insert new text and then type the text.

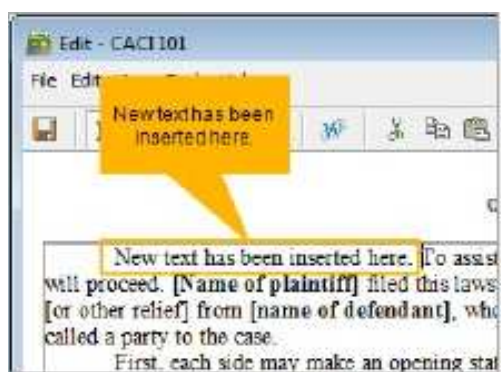



Figure 5-12. *Selected Instruction in which text has been inserted*

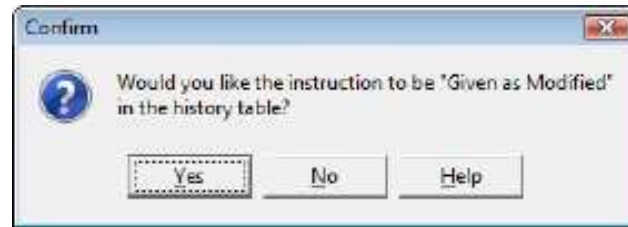
Also use the features on the window's menu bar and toolbar to further edit the instruction, using the techniques later in this section.

Save an edited Selected Instruction

When you are ready to save an edited Selected Instruction, use the **Edit** window's  **Save** button.


To save an edited Selected Instruction

1. Click  **Save** on the **Edit** window's toolbar.
If this is the first time you have saved the instruction, a confirmation message appears to ask if you want to set the instruction's Status flag to "Given as Modified."



2. Respond appropriately.

Auto-populate Selected Instructions with case information

Many instructions include auto-populate fields that are intended to be replaced with stored case information. You can recognize these auto-populate fields by the brackets that frame them. The brackets may appear as parentheses (), square brackets [], or angle brackets < >, depending on the type of instruction (e.g., civil, criminal). You can also quickly distinguish the auto-populate fields by clicking  **Bold Case Information** on the **Edit** window's toolbar.

Using the *Auto-populate* feature, you can replace these bracketed fields with applicable stored case information. For example, wherever the field "[name of defendant(s)]" appears, it will be replaced with the defendant's name. Similarly, gender phrases such as "[he/she]" will be replaced with the correct pronoun for the defendant's or plaintiff's gender.

You can auto-populate Selected Instructions individually or globally.

NOTES:

- (1) If you attempt to manually edit the text within an auto-populate field, you will be alerted that the field will be changed to text and can no longer be auto-populated. You can elect to proceed or to cancel your edit.
- (2) If you re-auto-populate instructions at some point in future, they will be updated with the latest stored case information. (Gender phrases are the exception.)

TIP: As a best practice after auto-populating an Selected Instruction, be sure to review brackets and blanks. (See "Review brackets and blanks in Selected Instructions," page 67.)

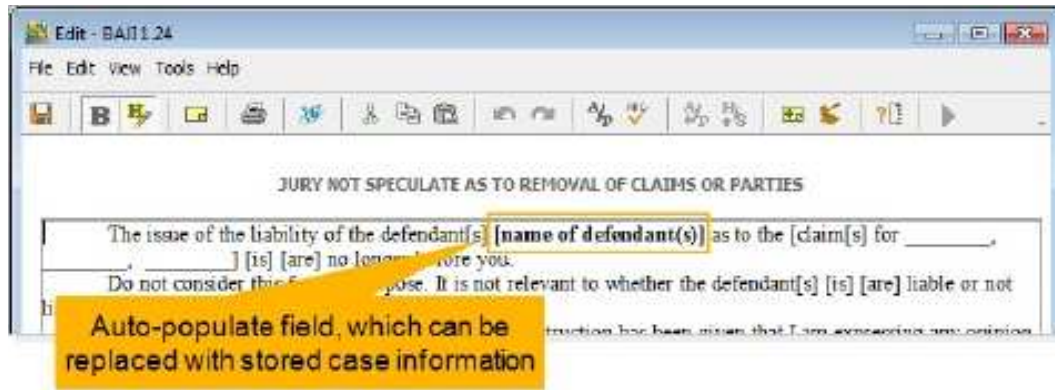





Figure 5-13. An auto-populate field on a Selected Instruction

NOTE: To quickly see exactly which case information field is tied to a particular auto-populate field, right-click the auto-populate field. That will open a preview balloon that identifies the case information field. (See Figure 5-9.)

Auto-populate individual Selected Instructions

Use the following procedure to auto-populate an individual Selected Instruction.


To auto-populate an individual Selected Instruction

1. Open the Selected Instruction for editing (see page 64).
2. On the **Edit** window's toolbar, click  **Auto-Populate**.
The instruction's auto-populate fields are replaced by applicable case information and are highlighted for easy identification. (If you don't see the highlighting, click  **Highlight Text Changes**.)
3. Look through the highlighted changes, and edit any that need further editing.
4. Click  **Save** to save.
Respond as needed to the confirmation message regarding the "Given as Modified" status flag.

Globally auto-populate all Selected Instructions

Use the following procedure to auto-populate all Selected Instruction.

To auto-populate all Selected Instruction instructions

1. Do either of the following:
 - With any tab open, choose **Tools > Automated Tools > Auto-Populate All Instructions**.
 - On the **Jury Instruction** tab's **Selected Instructions** page, click  **Auto-Populate All Instructions**.
2. Respond as needed to the confirmation message regarding the "Given as Modified" status flag.
3. On the information window that opens, click **OK**.

Review brackets and blanks in Selected Instructions

Many Selected Instructions contain brackets and blanks that identify places where you may want to replace text, select from among optional text, or enter text (Figure 5-14). Brackets (parentheses (), square brackets [], or angle brackets <>, depending on the type of instruction) indicate places where you can replace text or select from among optional text for grammatical correctness. Blanks indicate places where you can insert text. Some blanks include explanatory text in parentheses to suggest what you are to insert. For example, you might see something like "__(insert duty)___."

NOTE: Many bracketed fields are auto-populate fields, which you can replace with the *Auto-Populate* feature (page 65). But, as a best practice, you should auto-populate your Selected Instructions first, and then review brackets and blanks and make any necessary manual edits.

You can review brackets and blanks in Selected Instructions individually or globally.

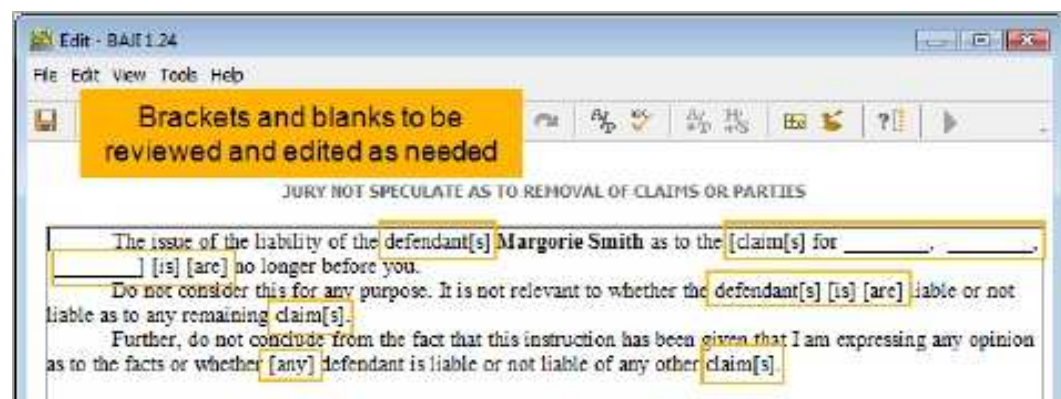



Figure 5-14. Brackets and blanks in a Selected Instruction (after auto-populating)

Review brackets and blanks in an individual Selected Instruction



Use the following procedure to review the brackets and blanks in an individual Selected Instruction.




To review brackets and blanks in an individual Selected Instruction

1. Open the Selected Instruction for editing (see page 64).
2. On the **Edit** window's toolbar, click  **Brackets and Blanks Review**.
The window changes to the **Brackets & Blanks Review** window. (Notice the window's title.)
The first bracketed text or blank is selected, ready for you to review and edit as needed.
3. Edit the brackets and blanks manually.



Position the insertion pointer anywhere within the instruction to manually edit text at that point. (If you manually edit within the brackets of an auto-populate field, an information message will appear to alert you that the *Auto-Populate* feature will be disabled for that field. Respond appropriately.)

Also use the following editing shortcuts.

- **Ctrl + n**, where *n* is a number corresponding to an option's position within a set of bracketed options – Selects an option by its position. For example, given the options *[attendant/bailiff]*, you could quickly select "bailiff" by pressing **Ctrl+2**.
-  **Cut** or **Ctrl+X** – Deletes the selected placeholder text or blanks. You can then type new text.
-  **Copy** or **Ctrl+C** – Copies the selected placeholder text or blanks for pasting elsewhere.

-  **Paste** or **Ctrl+V** – Pastes text copied from elsewhere in place of the selected placeholder text or blanks.
-  **Undo** or **Ctrl+Z** – Reverses the last change.
-  **Redo** or **Ctrl+Y** – Reinstates the reversed change.


IMPORTANT! The authors of the official instructions sometimes inadvertently omit the bracket that "closes" some bracketed language. Likewise, you might occasionally inadvertently remove a closing bracket while editing a Selected Instruction. When the *Brackets and Blanks Review* tool advances to one of these "open" or "unbalanced" brackets, a message appears saying that there is a bracket in the instruction whose closing bracket is missing. For information on how to handle these "open" brackets, visit the Frequently Asked Question "What do I do about an 'open' or 'unbalanced' bracket?" in the program's Help system .

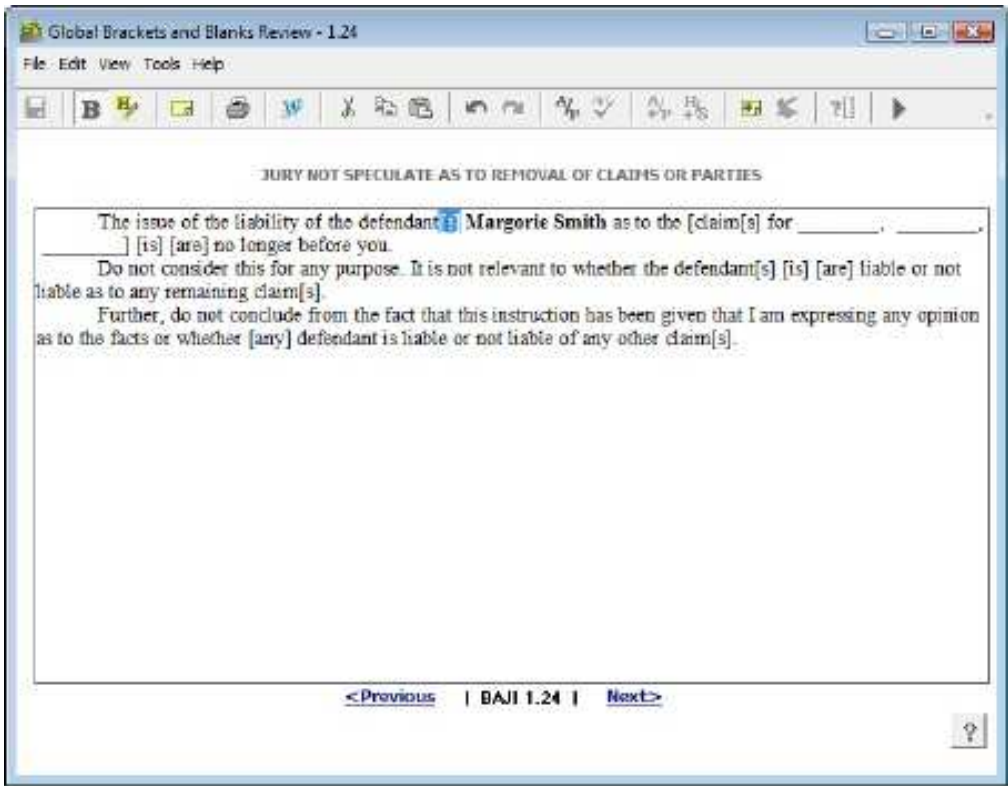
4. To advance through remaining items, click  **Review Next** or press **Tab** or **Ctrl+Tab**.
5. Click  **Save** to save.
Respond as needed to the confirmation message regarding the "Given as Modified" status flag.


Globally review brackets and blanks in all Selected Instructions

Use the following procedure to review the brackets and blanks in all Selected Instructions.

To review brackets and blanks in all Selected Instructions

1. Do either of the following:
 - With any tab open, choose **Tools > Global Review Tools > Brackets & Blanks Review**.
 - On the **Jury Instruction** tab's **Selected Instructions** page, click  **Global Brackets and Blanks**.
2. A confirmation window appears prompting you to confirm whether you would like the Status flags for all the instructions to be set to "Given as Modified." Respond appropriately.
The **Global Brackets and Blanks Review** window opens, with the first bracketed text or blank selected, ready for you to review and edit as needed. (Note the instruction number appearing between the **<Previous** and **Next>** links.)



3. Use the same techniques as described above to edit the brackets and blanks.
4. When you have finished reviewing brackets and blanks, click  **Save** to save.

Check spelling

Use the **Spell Checker** window to search for and correct misspellings in your Selected Instructions. You can spell-check Selected Instructions individually or globally.

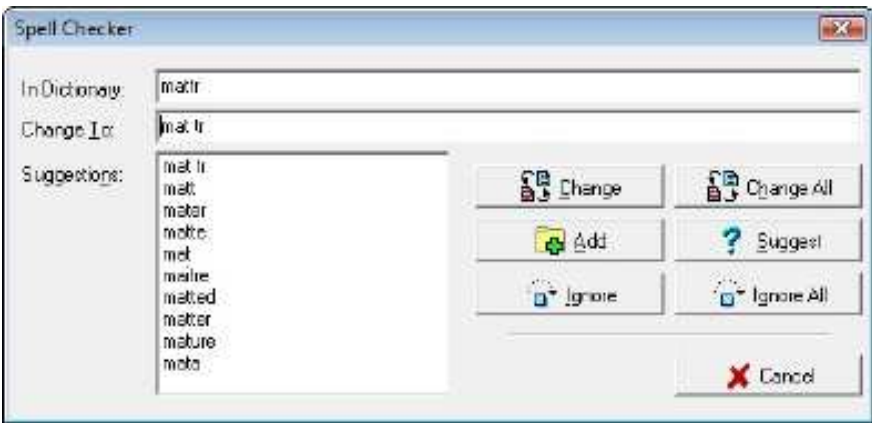




Figure 5-15. *Spell Checker window*

Table 5-1. *Spell Checker buttons*


Button	Description
Change	Changes the misspelled word with the text in the Change To box.
Change All	Changes all occurrences of the misspelled word with the text in the Change To box.
Add	Adds the text in the Change To box to the dictionary. In response to the "Add 'text' to dictionary" message, click Yes or No as desired.
Suggest	Updates the list of suggested replacements shown in the Suggestions list.
Ignore	Ignores the current misspelled word and searches for the next.

Button	Description
Ignore All	Ignores all occurrences of the misspelled word.

To spell-check an individual Selected Instruction

1. Open the Selected Instruction for editing (see page 64).
2. On the **Edit** window's toolbar, click  **Spell Check**.
If a misspelled word is found, the **Spell Checker** window opens.
3. To correct misspellings, use the buttons described in the table below.
4. Click  **Save** to save.
Respond as needed to the confirmation message regarding the "Given as Modified" status flag.

To spell-check all Selected Instructions

1. Do either of the following to begin:
 - On the **Jury Instructions** tab's **Selected Instructions** page, click  **Global Spell Check**.
 - With any tab open, choose **Tools > Global Review Tools > Spell Check**.


The **Edit** window opens, over which, if a misspelled word is found, the **Spell Checker** window opens.

2. To correct misspellings, use the buttons described in the table below. As you work, the program will automatically find the next misspelling.
When all misspellings have been addressed, the **Spell Checker** window closes.
3. On the information window that opens, click **OK**.

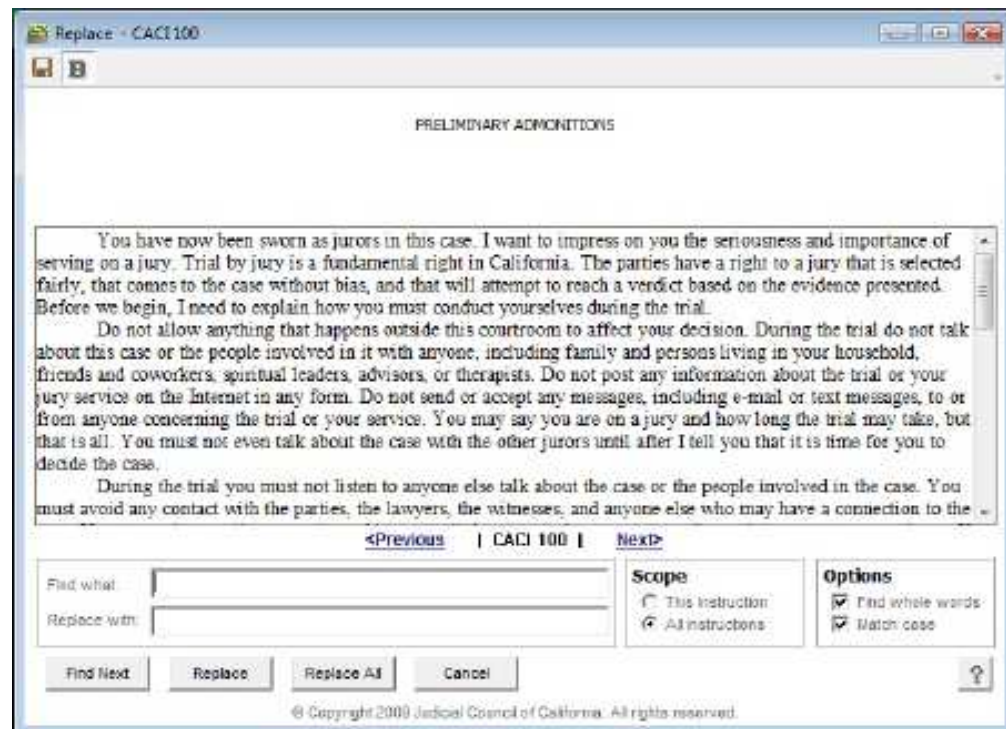
Search for and replace text in Selected Instructions


With the *Replace* feature, you can search for text in one or more Selected Instructions and replace it with other text.

To search for and replace text in Selected Instructions

1. Do either of the following to begin:
 - On the **Jury Instructions** tab's **Selected Instructions** page, click  **Replace**.
 - With any tab open, choose **Tools > Global Review Tools > Replace**.

The **Replace** window opens, showing the first Selected Instruction. (Note the instruction number appearing between the **<Previous** and **Next>** links.)




2. In the *Find what* box, type the text you want to search for. In the *Replace with* box, type the text you want to replace it with.
3. Set the *Scope* and *Options* settings as desired. For example, you can elect to search in the displayed instruction only and to match case.
4. When ready to search, click **Find Next**. If an occurrence of the search text is found, click either:
 - **Replace** to replace only this occurrence.
 - **Replace All** to replace all occurrences (either in the open instruction only or in the entire instruction set, depending on the scope).
5. To advance to the next selected instruction in the instruction set, click **Next>**. (You do not need to do this if the scope is for all instructions.) Repeat the process to search for and replace more occurrences.
6. Click  **Save** to save.
Respond as needed to the confirmation message regarding the "Given as Modified" status flag.


Add authorities to Selected Instructions

For some or all of your Selected Instructions, you may want to add authorities to them so that the authorities will appear in the printed jury instructions. The authorities material originates from the Commentaries associated with the instructions. In fact, when you add authorities, you actually append the entire texts of the Commentaries to the end of their respective instructions. (You may then want to remove any material that you do not want to include in the printed jury instructions.)


You can add authorities to Selected Instructions individually or globally.

To add authorities to an individual Selected Instruction

1. Open the Selected Instruction for editing (see page 64).
2. On the **Edit** window's toolbar, click  **Add Authorities**.
The complete text from the instruction's Commentary is added to the end of the instruction.

3. Click  **Save** to save.
Respond as needed to the confirmation message regarding the "Given as Modified" status flag.

To add authorities to all Selected Instructions


1. Do either of the following to begin:
 - On the **Jury Instructions** tab's **Selected Instructions** page, click  **Add Authorities to all selected instructions.**
 - With any tab open, choose **Tools > Automated Tools > Add Authorities All Instructions.**
2. Respond as needed to the confirmation message regarding the "Given as Modified" status flag.
3. On the information window that opens, click **OK**.

Convert a Selected Instruction to verdict format


You can easily convert the text of a Selected Instruction into the format of a verdict. For example, for a criminal case, you can include the "Guilty" and "Not Guilty" instructions and convert these to verdict format. (You can always revert back to a normal instruction if needed.)

Convert a Selected Instruction to a verdict

To convert an instruction to a verdict

1. Open the Selected Instruction for editing (see page 64).
2. On the **Edit** window's toolbar, click  **Make Verdict.**
A warning message appears prompting if you want to convert the instruction to a verdict.



3. Click **Yes** to convert the instruction.
The instruction is now reformatted as a verdict.
4. Click  **Save** to save.
Respond as needed to the confirmation message regarding the "Given as Modified" status flag.

Revert a verdict back to instruction format

Provided that you have saved the instruction file, any edits you have made to a verdict will remain intact when you revert it back to a standard instruction. (If you have not yet saved your instruction file, any edits you made to the verdict will be lost when you revert it to an instruction.)

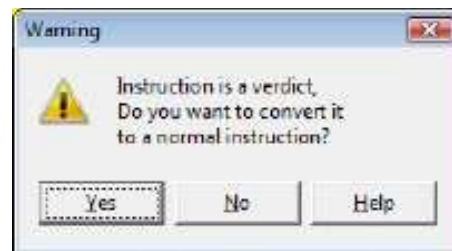
To revert a verdict back to an instruction


1. Open the Selected Instruction for editing (see page 64).
2. On the **Edit** window that opens, click



Undo Verdict.

A warning message appears prompting if you want to revert the verdict to a normal instruction.




3. Click **Yes** to convert back to a normal instruction.
4. Click  **Save** to save.
Respond as needed to the confirmation message regarding the "Given as Modified" status flag.

Remove (deselect) an instruction

You can easily remove (deselect) a Selected Instruction from your instruction set at any time.

CAUTION! Any edits you may have made to the Selected Instruction are lost when you remove it.

To remove an instruction from your instruction file

- On the **Jury Instructions** tab, do any of the following:
 - On the **Master Instructions** page, locate the instruction and click once on its row.
 - On any of the other pages, locate and highlight the instruction and then click  **Select/Deselect Instruction**, or choose **Instruction > Select/Deselect**.

The instruction is no longer a Selected Instruction in your instruction file.

Fine-tune the order of Selected Instructions in your instruction file



Once you have selected all the instructions you want to include in your instruction file, you can then arrange the order in which they will appear when printed. You can move their position relative to other instructions. If you will be printing them in Booklet format, you can also edit, as needed, the titles of the chapters in which the instructions will appear.

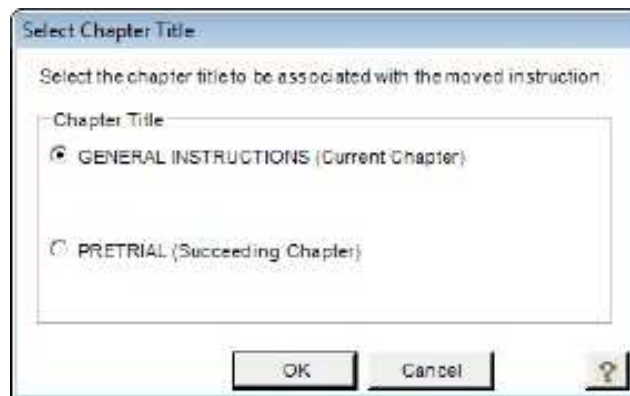
Change the print order of Selected Instructions

By default, Selected Instructions are arranged alphanumerically by their instruction numbers (which are, in turn, associated with default chapters for the Booklet format). This is the default order in which jury instructions will be printed. However, you can change the order as you prefer, which you do on the **Jury Instructions** tab's **Chapters/Sort** page.

NOTE: The new arrangement of instructions will be reflected as well on the **Jury Instructions** tab's **Selected Instructions** page and on the **Print** tab's **Choose Instructions** page. When you print Selected Instructions, they will print in this order (unless you override the order at the point of selecting which instructions to print).

To change the print order of Selected Instructions

1. On the **Jury Instruction** tab's **Chapters/Sort** page, highlight a Selected Instruction that you want to move.
2. Click  **Move Up** and  **Move Down** to reposition it on the list. Alternatively, drag an instruction to the desired position. If the instruction's new position is in a different chapter than its default chapter, the **Select Chapter Title** window opens. Select the chapter title you want to associate with the moved instructions and click **OK**.



3. Repeat to move other Selected Instructions until all of the instructions are in the order you prefer.
If you plan to print instructions using Booklet format, continue to "Edit a Selected Instruction's associated chapter title," below.

Edit a Selected Instruction's associated chapter title

NOTE: This section pertains only if you plan to print your Selected Instructions using the Booklet format. In that format, instructions are arranged into chapters. If you do not plan to print using that format, you can skip this section.

By default, Selected Instructions based on Master Instructions are included in specific chapters based on their instruction number. For example, instructions whose numbers are in the *100* series are generally contained in a chapter called GENERAL INSTRUCTIONS.


But if you changed the order of the Selected Instructions (as described in previous page), you will likely need to edit the associated chapter titles of at least some of those instructions. Why? Consider the situation in which you have a number of instructions all associated with one chapter, but you then move an instruction associated with a different chapter to a position among them.

For example, the figure below shows an instruction associated with the GENERAL INSTRUCTIONS chapter moved to a position among instructions associated with the PRETRIAL chapter. Were you to print these instructions using the Booklet format, there would be not one PRETRIAL chapter, but two PRETRIAL chapters, with a GENERAL INSTRUCTIONS chapter between them. To remedy this situation, you would edit the title of the intervening instruction to PRETRIAL so that there will be one, continuous PRETRIAL chapter.

Type	Instr.	Description Header	Chapter Title
PERS	BITE.1	BITING POLICE DOG	
BAJI	16.50	FORM OF SPECIAL	FORMS OF SPECIAL VERDICTS AND JUDGE
CACI	100	PRELIMINARY	PRETRIAL
CACI	101	OVERVIEW OF TRIAL	PRETRIAL
BAJI	1.24	JURY NOT SPECULATE	GENERAL INSTRUCTIONS
CACI	102	TAKING NOTES DURING	PRETRIAL
CACI	106	EVIDENCE	PRETRIAL
CACI	107	WITNESSES	PRETRIAL
CACI	108	DUTY TO ABIDE BY	PRETRIAL

Figure 5-16. An instruction associated with one chapter moved to appear among instructions associated with a different chapter

Selected Instructions based on Personal Instructions will not be associated with any particular chapter. But if you included any in your instruction file, you will also need to edit their "blank" chapter title to be an actual chapter title. Otherwise, they will appear as "orphan" instructions interspersed among the chapters.

CAUTION! Before editing any chapter title, you should finalize the order of instructions in case you later decide to use the  **Reset Chapters** button to return the instructions to their chapter defaults. Resetting chapters affects *both* the order of the instructions *and* their associated chapter titles.

To edit a Selected Instruction's chapter title

1. On the **Jury Instruction** tab's **Chapters/Sort** page, highlight an instruction whose chapter title you want to edit.

2. Click  **Edit Chapters** on the page's toolbar.
The **Edit Chapter Title for Selected Instruction** window opens.




3. From the *Chapter Title* drop-down list, which lists only those chapters associated with the Selected Instructions, select the appropriate chapter. Alternatively, type the name of a custom chapter. (The program does not require that the title be in all caps, but you might prefer to do so for consistency with other chapter titles.)
4. Click **OK** to save and close.
5. Repeat as needed to edit other instructions' titles.

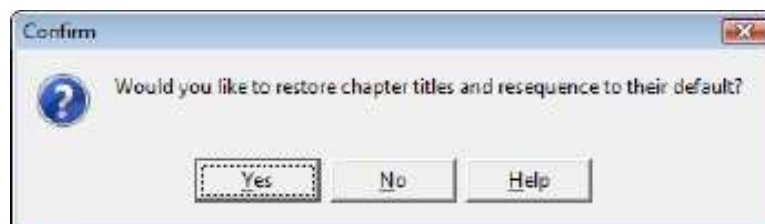
Reset Selected Instructions' order and associated chapter titles

With the *Reset Chapters* feature, you can easily reset both the order and associated chapter titles of your Selected Instructions. You do this on the **Jury Instructions** tab's **Chapters/Sort** page.

CAUTION! Resetting chapters affects *both* the order of instructions *and* their associated chapter titles.

To reset Selected Instructions' order and their associated chapter titles

1. On the **Jury Instruction** tab's **Chapters/Sort** page, click  **Reset Chapter**.
2. In response to the confirmation message, click **Yes**.



Track the history of Selected Instructions

This section begins by defining the History Table and then covers how to track the history and status of your Selected Instructions (e.g., who requested an instruction's inclusion, was it modified, was it refused, and so forth).

About the History Table

The *History Table* is a database table that stores flags used to track the history and status of Selected Instructions in an instruction set. There are two types of flags:

- *Requested-By flags* – As their name suggests, these flags indicate who has requested the inclusion of an instruction: the plaintiff, the defendant, the court, or some other party. (See "Assign Requested-By flags," below.)
- *Status flags* – These flags indicate whether an instruction will be given to the jury "as modified" or "as requested" or whether it has been refused or withdrawn. (See "Assign Status flags," facing page.)

The flags associated with the Selected Instructions will be appear in the printed jury instructions (if you so elect).

Assign Requested-By flags

As needed, you can assign a Requested-By flag to an instruction to indicate who requested the instruction. For example, when the defendant's attorney requests a particular instruction, assign it the "Requested by Defendant" flag.

The four Requested-By flags (for *Plaintiff/People*, *Defendant*, *Court*, and *Other*) appear in the *Requested* column of instructions (with one exception, described below). You can assign the flags on any of the pages of the **Jury Instructions** tab (although we suggest not doing so on the **Chapters/Sort** page because it doesn't show the *Requested* column). You may assign more than one Requested-By flag to the same instruction.

To assign a Requested-By flag to an instruction

1. On any page of the **Jury Instructions** tab (other than **Chapters/Sort**), do any of the following:
- Right-click the instruction and choose the desired Requested-By flag on the shortcut menu.
 - Highlight the instruction, and then use the applicable menu command, button, or keyboard shortcut to select the desired flag. Repeat to add other flags to the same instruction, if needed.

Flag	Menu command	Button	Key
Plaintiff/People	Instruction > Requested By > Plaintiff/People		P or Shift+Ctrl+P
Defendant	Instruction > Requested By > Defendant		D or Shift+Ctrl+D
Court	Instruction > Requested By > Court		C or Shift+Ctrl+C
Other	Instruction > Requested By > Other		O or Shift+Ctrl+O

In the case of Plaintiff/People, Defendant, or Court, the corresponding flag now appears in the *Requested* column.

Requested	Type	Instruction	Description Header	Print Date
	CACI	106		2/2005
	CACI	107		4/2007
	CACI	108	DUTY TO ABIDE BY TRANSLATION PROVIDED IN COURT	4/2004
	CACI	204	WILLFUL SUPPRESSION OF EVIDENCE	10/2004

In the case of Other, the **Other Party Name** window opens.

Other Party Name

Enter the name of the party below.

Other Party Name:

OK Cancel

2. In the *Other Party Name* box, select or type the name of the party other than the plaintiff, defendant, or court who has requested the instruction, and then click **OK**. The Other flag appears in the *Requested* column.

To remove a Requested-By flag

- The Requested-By flags' commands, toolbar buttons, and keyboard shortcuts work as "on/off" toggles. Use the same techniques as above to remove (deselect) flags.

Assign Status flags

Use Status flags to track the status of an instruction. You can indicate if a given instruction is *Given As Requested*, *Given As Modified*, *Refused*, *Withdrawn*, or *Proposed*.

By default, an instruction's Status flag is set to *None* when it is first selected for inclusion in the instruction file. Whenever you edit a Selected Instruction, Jury Instruction Selector will conveniently

prompt if you want to set its Status flag to *Given As Modified*. Typically, after a conference between the court and the attorneys, you will change the Status flags of some of the Selected Instructions.

You can set an instruction's Status flag while viewing the **Jury Instructions** tab's **Selected Instructions**, **Chapters/Sort**, or **History** page. However, only the **History** page has a *Status* column where you can view how the Status flags are set.

To assign the Status flag of an instruction

- On the **Jury Instructions** tab's **Selected Instructions**, **Chapters/Sort**, or **History** page, do either of the following:
 - Right-click the instruction and choose the desired Status flag on the shortcut menu.
 - Highlight the instruction, and then use the applicable menu command or keyboard shortcut to assign the desired flag.

Flag	Menu command	Key
Given As Requested	Instruction > Status > Given As Requested	Shift+Ctrl+R
Given As Modified	Instruction > Status > Given As Modified	Shift+Ctrl+M
Refused	Instruction > Status > Refused	Shift+Ctrl+F
Withdrawn	Instruction > Status > Withdrawn	Shift+Ctrl+W
Proposed	Instruction > Status > Proposed	Shift+Ctrl+S

On the **History** page, the corresponding Status flag now appears in the *Status* column.

Requested	Type	Instruction	Description Header	Status
	CACI	106	EVIDENCE	Given as Modified
	CACI	107	WITNESSES	Given as Modified
	CACI	108	DUTY TO ABIDE BY TRANSLATION PROVIDED IN	Given as Requested
 	CACI	204	WILLFUL SUPPRESSION OF EVIDENCE	None

To remove a Status flag

- On the **Jury Instructions** tab's **Selected Instructions**, **Chapters/Sort**, or **History** page, do either of the following:
 - Right-click the instruction and choose *None* on the shortcut menu.
 - Highlight the instruction and choose **Instruction > Status > None** or press Shift+Ctrl+N.

CHAPTER 6. PRINTING JURY INSTRUCTIONS

This chapter describes the various formats in which you can provide printed jury instructions. It also offers procedures for setting various printing preferences and for printing, previewing, and printing instructions to a file.

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About printing

Jury Instruction Selector offers several formats for printed jury instructions. The court may prefer a particular format, so be sure to inquire before preparing the printed instructions. Take a few moments to familiarize yourself with the formats. For detailed information, begin with "Print formats," page 85.

You will select instructions for printing and set various print format options on the pages of the **Print** tab. For detailed information, begin with "Print tab," next page.

Besides using one of the print formats, you can also print the text of an individual instruction (page 98), print the text of a Commentary (page 98), and print a list of instructions (page 98).

Before printing for the first time, we suggest you set some defaults:

- Set up the default printer (page 93)
- Set the default print-to-file file type (page 94)
- Set the default fonts for printing (page 93)

Print tab

When ready to print your jury instructions, you will work on the **Print** tab (Figure 6-1). Along its left panel, the tab is divided into pages, such as **Choose Instructions**, **Single Page**, and **L.A. County Forms**. Just click a heading to go to the page you want to work with.

Choose Instructions page

Use the **Choose Instructions** page of the **Print** tab to select which of the Selected Instructions in your instruction file you would like to print, preview, or print to a file.

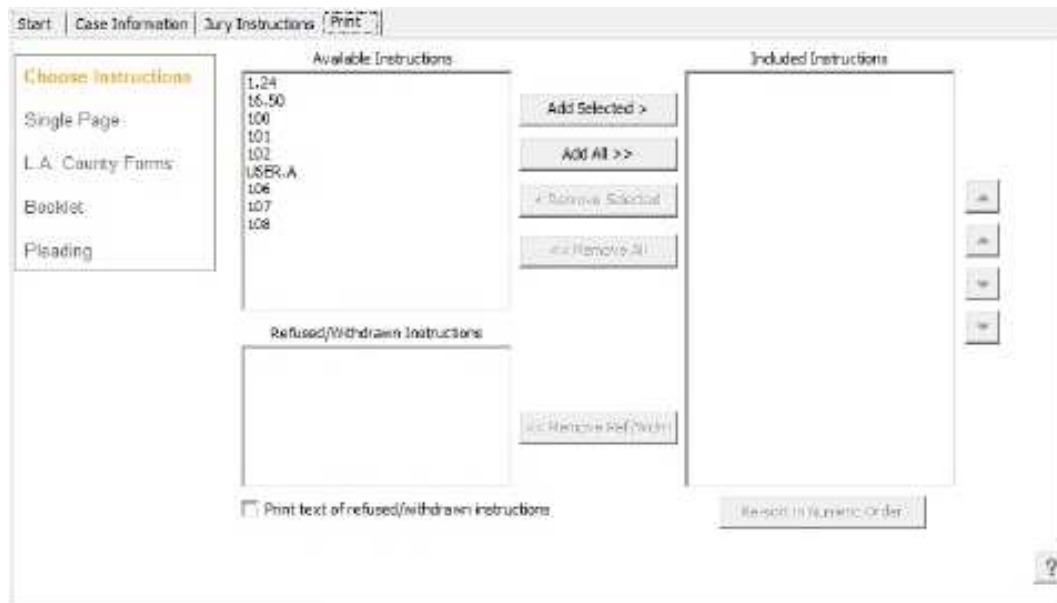


Figure 6-1. Choose Instructions page of the Print tab

Single Page page

Use the **Print** tab's **Single Page** page to select options for printing jury instructions using the Single Page format (page 85).

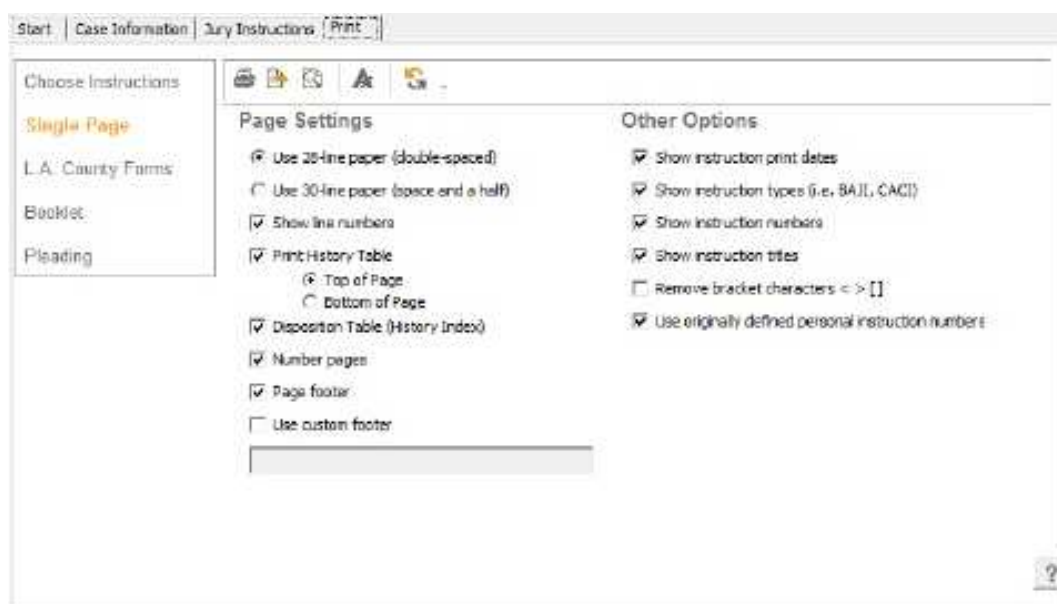


Figure 6-2. Single Page page


TIP: To reset the printing options to their default settings, just click  **Restore Defaults** in the tab toolbar.

Table 6-1. Settings for the Single Page format

Section	Description
Page Settings	<div>Select from among the page settings:</div> <ul style="list-style-type: none">• <i>Use 28-line paper (double-spaced)</i> – Select if the court clerk prefers 28-line paper.• <i>Use 30-line paper (space and a half)</i> – Select if the court clerk prefers 30-line paper.• <i>Show line numbers</i> – Select to show line numbers.• <i>Print History Table</i> – Select to include each instruction's History Table and select the table's position on the page (top or bottom).• <i>Disposition Table (History Index)</i> – Select to include the Disposition Table (page 91), which will be printed on its own page at the end of the printout.• <i>Number pages</i> – Select to include page numbers, shown in the bottom center of the page.• <i>Page footer</i> – Select to include a page footer. The default civil case footer reads "Judicial Council of California Jury Instructions." The default criminal case footer reads "Jury Instructions." You can override the default footer with your own custom footer; see <i>Custom page footer</i> next.• <i>Custom page footer</i> – Select to use a custom page footer, and type the footer text in the text box.
Other Options	<div>Select from among the other printing options:</div> <ul style="list-style-type: none">• <i>Show instruction print dates</i> – Select to include the print date of each instruction.• <i>Show instruction types (i.e. BAI, CACI)</i> – Select to include the type of each instruction, such as BAI or CACI.• <i>Show instruction numbers</i> – Select to include the number of each instruction.• <i>Show instruction titles</i> – Select to include the title of each instruction.• <i>Remove bracket characters < > []</i> – Select to automatically remove all of the brackets that were missed. In the case of square brackets, the program will accept all of the text found within each of the bracketed text material remaining after your edits. In the case of angle brackets (used only in CALCRIM), the text between the brackets is be removed outright. When you select this option, you will be prompted to confirm.• <i>Use originally defined personal instruction numbers</i> – Select to use the instruction numbers (which may include letters) for Personal Instructions when they were first created. If you clear this check box, the Personal Instructions will be numbered in order beginning with 1 and in the order shown on the Jury Instructions tab's Chapters/Sort page.

L.A. County Forms page

Use the **Print** tab's **L.A. County Forms** page to select options for printing jury instructions using the Los Angeles County Forms 176/177 format (page 86).

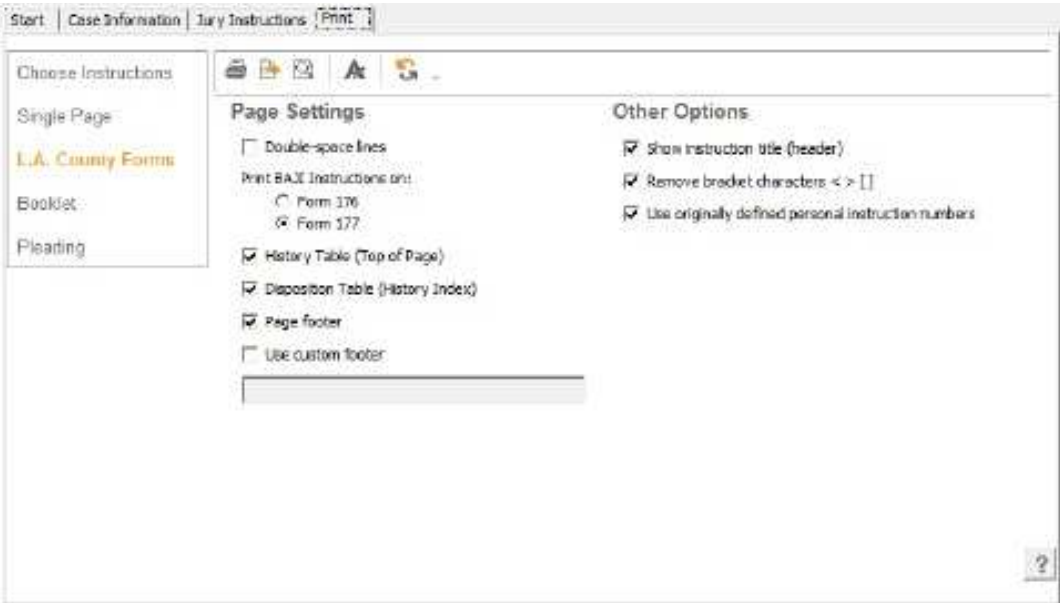


Figure 6-3. L.A. County Forms page


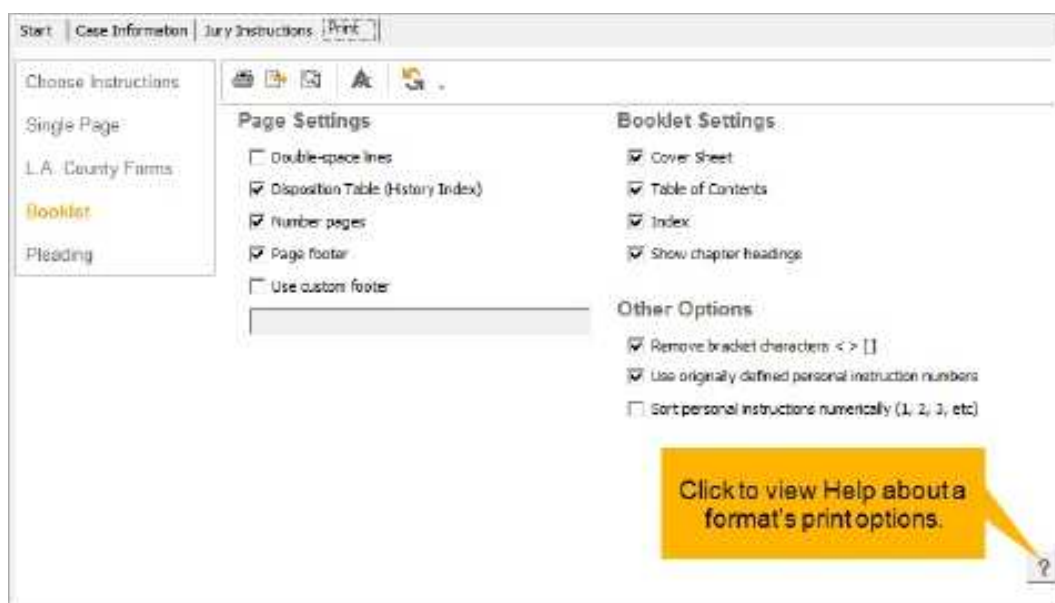
TIP: To reset the printing options to their default settings, just click  **Restore Defaults** in the tab toolbar.

Table 6-2. Settings for the L.A. County Forms format

Section	Description
Page Settings	<p>Select from among the page settings:</p> <ul style="list-style-type: none"> • <i>Double-space lines</i> – Select to print text double-spaced. • <i>Print BAJI Instructions on</i> – Select Form 176 or Form 177. • <i>History Table (Top of Page)</i> – Select to include each instruction's History Table at the top of the page. • <i>Disposition Table (History Index)</i> – Select to include the Disposition Table (page 91), which will be printed on its own page at the end of the printout. • <i>Page footer</i> – Select to include a page footer. The default civil case footer reads "Judicial Council of California Jury Instructions." The default criminal case footer reads "Jury Instructions." You can override the default footer with your own custom footer; see <i>Custom page footer</i> next. • <i>Custom page footer</i> – Select to use a custom page footer, and type the footer text in the text box.
Other Options	<p>Select from among the other printing options:</p> <ul style="list-style-type: none"> • <i>Show instruction title (header)</i> – Select to include the title of each instruction. • <i>Remove bracket characters < > []</i> – Select to automatically remove all of the brackets that were missed. In the case of square brackets, the program will accept all of the text found within each of the bracketed text material remaining after your edits. In the case of angle brackets (used only in CALCRIM), the text between the brackets is be removed outright. When you select this option, you will be prompted to confirm. • <i>Use originally defined personal instruction numbers</i> – Select to use the instruction numbers (which may include letters) for Personal Instructions when they were first created. If you clear this check box, the Personal Instructions will be numbered in order beginning with 1 and in the order shown on the Jury Instructions tab's Chapters/Sort page.

Booklet page

Use the **Print** tab's **Booklet** page to select options for printing jury instructions using the Booklet format (page 87).

**Figure 6-4.** Booklet page



TIP: If you want to reset the printing options to their default settings, just click **Restore Defaults** in the tab toolbar.

Table 6-3. *Settings for the Booklet format*

Section	Description
Page Settings	<div>Select from among the page settings:</div> <ul style="list-style-type: none">• <i>Double-space lines</i> – Select to print text double-spaced.• <i>Disposition Table (History Index)</i> – Select to include the Disposition Table (page 91), which will be printed on its own page at the end of the printout.• <i>Number pages</i> – Select to include page numbers, shown in the bottom center of the page.• <i>Page footer</i> – Select to include a page footer. The default civil case footer reads "Judicial Council of California Jury Instructions." The default criminal case footer reads "Jury Instructions." You can override the default footer with your own custom footer; see <i>Custom page footer</i> next.• <i>Custom page footer</i> – Select to use a custom page footer, and type the footer text in the text box.
Booklet Settings	<div>Select from among the booklet settings:</div> <ul style="list-style-type: none">• <i>Cover sheet</i> – Select to include a cover sheet, which includes the court name, judge name, and date.• <i>Table of Contents</i> – Select to include a Table of Contents, which includes the case name and number, the instruction Chapter title and appropriate page locator.• <i>Index</i> – Select to include an Index, which includes the case name and number, the instruction Chapter title, each of the instruction titles and numbers, and the appropriate page locator.• <i>Show chapter headings</i> – Select to include chapter titles (e.g., Introductory, Evidence, etc.).
Other Options	<div>Select from among the other printing options:</div> <ul style="list-style-type: none">• <i>Show instruction title (header)</i> – Select to include the title of each instruction.• <i>Remove bracket characters < > []</i> – Select to automatically remove all of the brackets that were missed. In the case of square brackets, the program will accept all of the text found within each of the bracketed text material remaining after your edits. In the case of angle brackets (used only in CALCRIM), the text between the brackets is be removed outright. When you select this option, you will be prompted to confirm.• <i>Use originally defined personal instruction numbers</i> – Select to use the instruction numbers (which may include letters) for Personal Instructions when they were first created . If you clear this check box, the Personal Instructions will be numbered in order beginning with 1 and in the order shown on the Jury Instructions tab's Chapters/Sort page.

NOTE: If you print instructions using Booklet format to a word processing file and elect to include a Table of Contents and/or Index, the page numbers will not appear to be present when the file is first generated. However, it is easy to reveal the page numbers, using your word processor's specific features. See the FAQ "Where are the page numbers in the Table of Contents or Index in my RTF file?" in the Help system.

Pleading page

Use the **Print** tab's **Pleading** page to select options for printing jury instructions using the Pleading format (page 91).

The screenshot shows the 'Print' tab interface. On the left, under 'Choose Instructions', the 'Pleading' option is selected. The main area is divided into two sections: 'Page Settings' and 'Other Options'. In 'Page Settings', 'Use 28-line paper (double-spaced)' is selected, 'Show line numbers' is checked, 'Number pages' is checked, and 'Page footer' is checked. In 'Other Options', 'Use originally defined personal instruction numbers' is checked, and 'Filing Date' is set to '12/ 4/2009'. A 'Restore Defaults' button is visible in the bottom right corner of the toolbar.

Figure 6-5. *Pleading page*


TIP: If you want to reset the printing options to their default settings, just click  **Restore Defaults** in the tab toolbar.

Table 6-4. *Settings for the Pleading format*

Section	Description
Page Settings	<p>Select from among the page settings:</p> <ul style="list-style-type: none"> • <i>Use 28-line paper (double-spaced)</i> – Select if the court clerk prefers 28-line paper. • <i>Use 30-line paper (space and a half)</i> – Select if the court clerk prefers 30-line paper. • <i>Show line numbers</i> – Select to show line numbers. • <i>Number pages</i> – Select to include page numbers, shown in the bottom center of the page. • <i>Page footer</i> – Select to include a page footer. The default civil case footer reads "Judicial Council of California Jury Instructions." The default criminal case footer reads "Jury Instructions." You can override the default footer with your own custom footer; see <i>Custom page footer</i> next. • <i>Custom page footer</i> – Select to use a custom page footer, and type the footer text in the text box.
Other Options	<p>Select from among the other printing options:</p> <ul style="list-style-type: none"> • <i>Include verdict forms</i> – Select to include a second paragraph, which places the instruction numbers for verdict forms following the verdict form paragraph. • <i>Use originally defined personal instruction numbers</i> – Select to use the instruction numbers (which may include letters) for Personal Instructions when they were first created. If you clear this check box, the Personal Instructions will be numbered in order beginning with 1 and in the order shown on the Jury Instructions tab's Chapters/Sort page. • <i>County</i> – Select a county from the drop-down list. The county you select will be placed in the heading, as in: SUPERIOR COURT OF CALIFORNIA COUNTY OF _____ • <i>Filing Date</i> – Select to include the court filing date in the pleading document. The default date is today's date.

Print formats

The following sections describe and illustrate the various print formats offered by Jury Instruction Selector.

Single Page format

Use the Single Page format to print each instruction beginning on its own page. You can set various printing options as you prefer (page 80), as well as change the default fonts for the format (page 93).

CACT 102. TAKING NOTES DURING THE TRIAL

Requested by Plaintiff	<input type="checkbox"/>	Requested by Defendant	<input type="checkbox"/>	Requested by	<input type="checkbox"/>
Given as Requested	<input type="checkbox"/>	Given as Modified	<input type="checkbox"/>	Given on Counsel's Motion	<input type="checkbox"/>
Refused	<input type="checkbox"/>	<div>Judge</div>			
Withdrawn	<input type="checkbox"/>				

Print date: 12/2007

You have been given notebooks and may take notes during the trial. Do not take the notebooks out of the courtroom or jury room at any time during the trial. You may take your notes into the jury room during deliberations.

You should use your notes only to remind yourself of what happened during the trial. Do not let your note-taking interfere with your ability to listen carefully to all the testimony and to watch the witnesses as they testify. Nor should you allow your impression of a witness or other evidence to be influenced by whether or not other jurors are taking notes. Your independent recollection of the evidence should govern your verdict, and you should not allow yourself to be influenced by the notes of other jurors if those notes differ from what you remember.

The court reporter is making a record of everything that is said. If during deliberations you have a question about what the witness said, you should ask that the court reporter's records be read to you. You must accept the court reporter's record as accurate.

At the end of the trial, your notes will be collected and destroyed/collected and retained by the court but not as a part of the case record/ specify other disposition.

Page 1 of 1

Judicial Council of California Jury Instructions

Figure 6-6. Single Page format (Rule 201) with the default footer and the History Table at the top

CACI 101. TAKING NOTES DURING THE TRIAL

Print date: 12/2007

You have been given notebooks and may take notes during the trial. Do not take the notebooks out of the courtroom or jury room at any time during the trial. You may take your notes into the jury room during deliberations.

You should use your notes only to remind yourself of what happened during the trial. Do not let your note-taking interfere with your ability to listen carefully to all the testimony and to watch the witnesses as they testify. Nor should you allow your impression of a witness or other evidence to be influenced by whether or not other jurors are taking notes. Your independent recollection of the evidence should govern your verdict, and you should not allow yourself to be influenced by the notes of other jurors if those notes differ from what you remember.

The court reporter is making a record of everything that is said. If during deliberations you have a question about what the witness said, you should ask that the court reporter's records be read to you. You must accept the court reporter's record as accurate.

At the end of the trial, your notes will be collected and destroyed/collected and retained by the court but not as a part of the case record/ specify other disposition.

REQUESTED BY:	
GIVEN AS REQUESTED	_____
GIVEN AS MODIFIED	_____
GIVEN ON COURT'S OWN MOTION	_____
REFUSED	_____
WITHDRAWN	_____

Page 1 of 1
SMITH V DOE

Figure 6-7. Single Page format (Rule 201) with a custom footer and the History Table at the bottom

Los Angeles County Forms 176/177 format

Use the Los Angeles County Forms 176/177 format to print on Form 176 or Form 177, used for providing instructions to the jury. The upper portion is separated and kept with the court files. The lower portion, which contains the instruction text, is given to the jury to aid the members in deciding the case as it clearly pertains to the law.

Form 176 is to be used for personal "specially"-drafted instructions, so it can include the authorities that allow the instructions to be given. You can choose to print BAJI instructions on either Form 176 or Form 177 as they are revised post-Judicial Council approved instructions.

You can set various printing options as you prefer (page 81), as well as change the default fonts for the format (page 93).

Instruction
No.101

OVERVIEW OF TRIAL

Requested by Plaintiff	<input type="checkbox"/>	Requested by Defendant	<input type="checkbox"/>	Requested by	<input type="checkbox"/>
Given as Requested	<input type="checkbox"/>	Given as Modified	<input type="checkbox"/>	Given on Court's Motion	<input type="checkbox"/>
Refused	<input type="checkbox"/>				
Withdrawn	<input type="checkbox"/>				

Judge

Instruction
No.101

Page 1 of 2

To assist you in your tasks as jurors, I will now explain how the trial will proceed. Name of plaintiff filed this lawsuit. He/She/It is called a plaintiff. He/She/It seeks damages or other relief from name of defendant, who is called a defendant. Each plaintiff and each defendant is called a party to the case.

First, each side may make an opening statement, but neither side is required to do so. An opening statement is not evidence. It is simply an outline to help you understand what that party expects the evidence will show. Also, because it is often difficult to give you the evidence in the order we would prefer, the opening statement allows you to keep an overview of the case in mind during the presentation of the evidence.

Next, the jury will hear the evidence. Name of plaintiff will present his/her/its evidence first. When name of plaintiff is finished, name of defendant will have an opportunity to present his/her/its evidence.

Each witness will first be questioned by the side that asked the witness to testify. This is called direct examination. Then the other side is permitted to question the witness. This is called cross-examination.

Documents or objects referred to during the trial are called exhibits. Exhibits are given a number/letter and marked so they may be clearly identified. Exhibits are not evidence until I admit them into evidence. During your deliberations, you will be able to look at all exhibits admitted into evidence.

There are many rules that govern whether something will be considered evidence in the trial. As one side presents evidence, the other side has the right to object and to ask me to decide if the evidence is permitted by the rules. Usually, I will decide immediately, but sometimes I may have to hear arguments outside of your presence.

After the evidence has been presented, I will instruct you on the law that applies to the case and the attorneys will make closing arguments. What the parties say in closing argument is not evidence. The arguments are offered to help you understand the evidence and how the law applies to it.

RC098 (Rev. 3-81) 4-85

Figure 6-8. Jury instruction printed in the Los Angeles County Forms 176/177 format

Booklet format

Use the Booklet format to print jury instructions as a booklet. This format is typically used for providing instructions either from the party’s attorney to the presiding judge or from the court to the jury.

The Booklet format can include a Table of Contents, the instructions, an Index, and the Disposition Table (page 91), in that order. It is paginated in the order set on the **Jury Instructions** tab's **Chapters/Sort** page or as ordered on the **Print** tab's **Choose Instructions** page. Each instruction number is shown in the far left column and can include the instruction type (e.g., BAI) with the instruction number.

You can set various printing options as you prefer (page 82), as well as change the default fonts for the format (page 93).

TABLE OF CONTENTS	
Case Name: SMITH V DOE Case No: 234567	
Instruction Header	Page
PRETRIAL	1
EVIDENCE	4
CONTRACTS	5

Figure 6-9. Table of Contents in the Booklet format

PRETRIAL	
100	<p>You have now been sworn as jurors in this case. I want to impress on you the seriousness and importance of serving on a jury. Trial by jury is a fundamental right in California. The parties have a right to a jury that is selected fairly, that comes to the case without bias, and that will attempt to reach a verdict based on the evidence presented. Before we begin, I need to explain how you must conduct yourselves during the trial.</p> <p>Do not allow anything that happens outside this courtroom to affect your decision. During the trial do not talk about this case or the people involved in it with anyone, including family and persons living in your household, friends and coworkers, spiritual leaders, advisors, or therapists. Do not post any information about the trial or your jury service on the Internet in any form. Do not send or accept any messages, including e-mail or text messages, to or from anyone concerning the trial or your service. You may say you are on a jury and how long the trial may take, but that is all. You must not even talk about the case with the other jurors until after I tell you that it is time for you to decide the case.</p> <p>During the trial you must not listen to anyone else talk about the case or the people involved in the case. You must avoid any contact with the parties, the lawyers, the witnesses, and anyone else who may have a connection to the case. If anyone tries to talk to you about this case, tell that person that you cannot discuss it because you are a juror. If he or she keeps talking to you, simply walk away and report the incident to the court attendant/bailiff as soon as you can.</p> <p>After the trial is over and I have released you from jury duty, you may discuss the case with anyone, but you are not required to do so.</p> <p>During the trial, do not read, listen to, or watch any news reports about this case. I have no information that there will be news reports concerning this case. You must decide this case based only on the evidence presented in this trial and the instructions of law that I will provide. Nothing that you see, hear, or learn outside this courtroom is evidence unless I specifically tell you it is. If you receive any information about this case from any source outside of the courtroom, promptly report it to the court attendant/bailiff.</p> <p>Do not do any research on your own or as a group. Do not use dictionaries, the Internet, or other reference materials. Do not investigate the case or conduct any experiments. Do not contact anyone to assist you, such as a family accountant, doctor, or lawyer. Do not visit or view the scene of any event involved in this case. If you happen to pass by the scene, do not stop or investigate. All jurors must see or hear the same evidence at the same time. If you do need to view the scene during the trial, you will be taken there as a group under proper supervision.</p> <p>It is important that you keep an open mind throughout this trial. Evidence can only be presented a piece at a time. Do not form or express an opinion about this case while the trial is going on. You must not decide on a verdict until after you have heard all the evidence and have discussed it thoroughly with your fellow jurors in your deliberations.</p> <p>Do not concern yourselves with the reasons for the rulings I will make during the course of the trial. Do not guess what I may think your verdict should be from anything I might say or do.</p> <p>When you begin your deliberations, you may discuss the case only in the jury room and only when all the jurors are present.</p> <p>You must decide what the facts are in this case. And, I repeat, your verdict must be based only on the evidence that you hear or see in this courtroom. Do not let bias, sympathy,</p>
	<p>1</p> <p>Judicial Council of California Jury Instructions</p>

Figure 6-10. Beginning of a chapter of jury instructions printed in the Booklet format

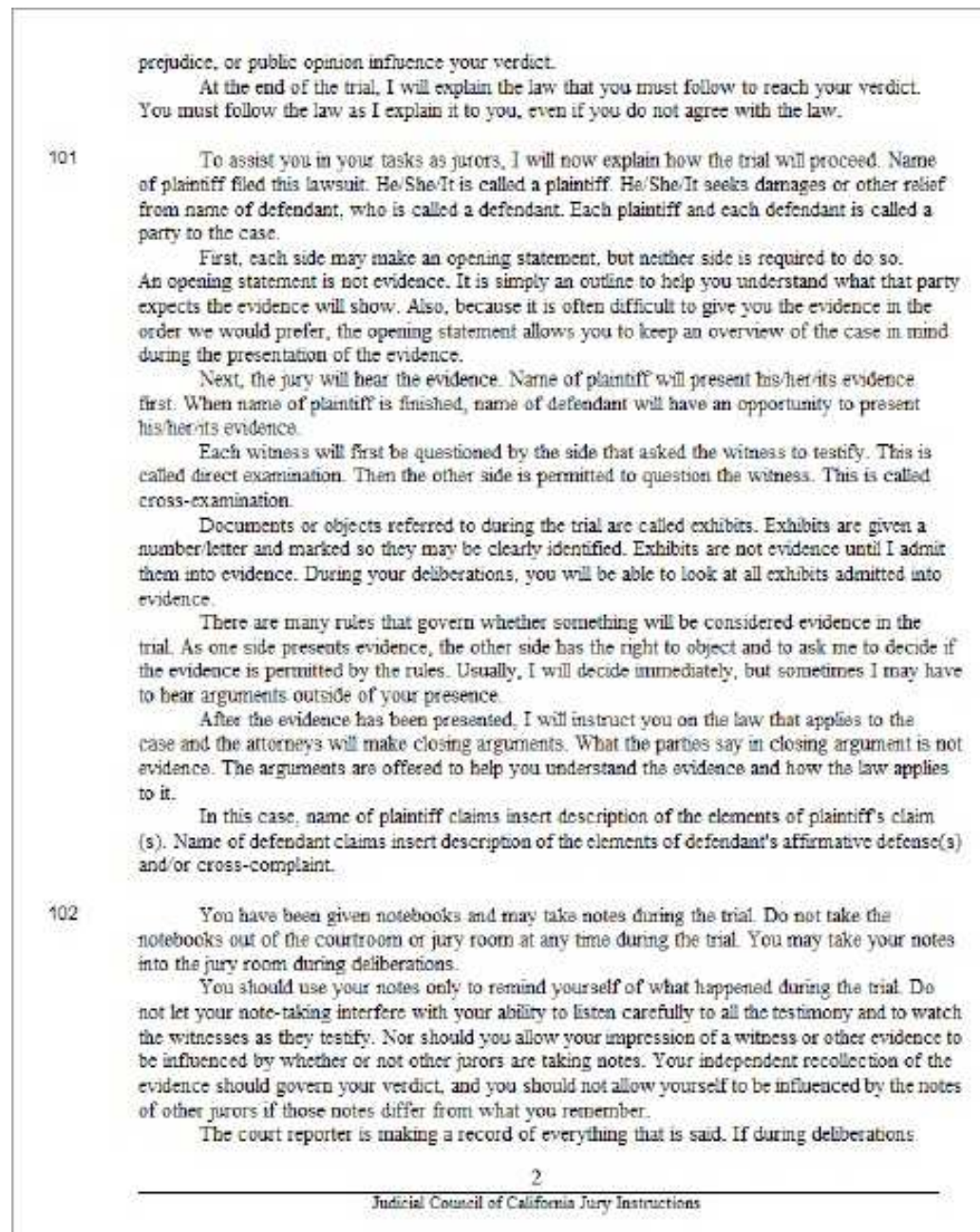


Figure 6-11. Continuation of the same chapter of jury instructions printed in the Booklet format

Chapter 6. Printing Jury Instructions

Print formats

<u>INDEX</u>		
Case Name: SMITH V DOE Case No: 234567		
<u>Inst. #</u>	<u>Instruction Header</u>	<u>Page</u>
PRETRIAL		
100	PRELIMINARY ADMONITIONS	1
101	OVERVIEW OF TRIAL	2
102	TAKING NOTES DURING THE TRIAL	2
106	EVIDENCE	3
107	WITNESSES	3
108	DUTY TO ABIDE BY TRANSLATION PROVIDED IN COURT	4
111	INSTRUCTION TO ALTERNATE JURORS	4
112	QUESTIONS FROM JURORS	4
EVIDENCE		
202	DIRECT AND INDIRECT EVIDENCE	4
205	FAILURE TO EXPLAIN OR DENY EVIDENCE	5
206	EVIDENCE ADMITTED FOR LIMITED PURPOSE	5
CONTRACTS		
322	OCCURRENCE OF AGREED CONDITION PRECEDENT	5

Figure 6-12. *Index in the Booklet format*

Pleading format

Use the Pleading format to prepare a pleading to request jury instructions.

You can set various printing options as you prefer (page 84), as well as change the default fonts for the format (page 93).

1 Jeffrey Sweet, Bar No. 1234567
2 Sweet and Henderson
3 51 State Street
4 Sacramento, CA 95814
5 Telephone: 555-555-1992
6 Fax: 555-555-8850
7 Email: JSweet@SweetHenderson.com
8 Attorney for: Plaintiff Robert Smith

9
10
11
12
13
14
15

SUPERIOR COURT OF THE STATE OF CALIFORNIA
COUNTY OF SACRAMENTO

Robert Smith,
Plaintiff,

vs.
Marjorie Doe,
Defendant,

Case No. 234567

REQUEST FOR JURY INSTRUCTIONS
(Code Civ. Proc. § 607a)

Judge: R. Frederickson
Dept.:
Trial Date: 2/4/2008

16 Plaintiff Robert Smith respectfully requests this court to give the following numbered Judicial
17 Council of California Civil Jury Instructions, and the additional instructions set forth below, and
18 any further or additional instructions that may be subsequently requested:
19
20 CACI 202, CACI 205, CACI 206
21 Dated: 2/7/2008

22 Sweet and Henderson
23 By _____
24 Jeffrey Sweet
25 Attorney for: Plaintiff Robert Smith
26
27
28

Figure 6-13. A request for jury instructions in the Pleading format

Disposition Table

Some of the print formats give you the option of including the *Disposition Table* (Figure 6-14). This table provides an "at-a-glance" view of the Requested-By flags and Status flags of the Selected Instructions. You can quickly see who requested which instructions (Plaintiff, Defendant, Court, or Other), how those instructions will be given to the jury (Given as Requested or Given as Modified), and whether any instructions have been refused or withdrawn. Additionally, the print date of each instruction is listed.

The Disposition Table always appears on its own page, regardless of the print format in use.

NOTE: In older versions of Jury Instruction Selector, the Disposition Table was known as the History Index. We've retained that term in the program for the convenience of long-time users.

DISPOSITION TABLE										
Case Name: Smith v Doe										
Case Number: 234567										
Date: 2/4/2010										
Instruction / Special Verdict #	Requested By					Given as		Ref. With-		Print Date
	Pltf	Dfde	Crt	Orth	Name(s)	Req	Mod	used	drawn	
CACI 100										12/2007
CACI 101										2/2007
CACI 102										12/2007
CACI 106										2/2005
CACI 107							×			4/2007
CACI 108							×			4/2004
CACI 111										10/2004
CACI 112										4/2007
CACI 202										9/2003
CACI 204		×			Defendant Marjorie Doe		×			10/2004
CACI 205										9/2003
CACI 206										9/2003
CACI 322										9/2003

Judicial Council of California Jury Instructions

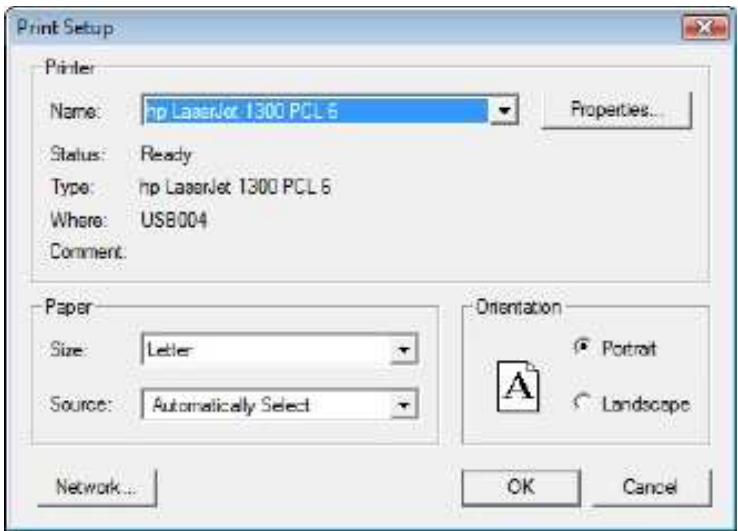
Figure 6-14. Disposition Table

Set up the default printer

Use the following procedure to select the program's default printer and various default print options used for printing instructions.

To set up the default printer

1. Choose **File > Print Setup**.
The **Print Setup** window opens.




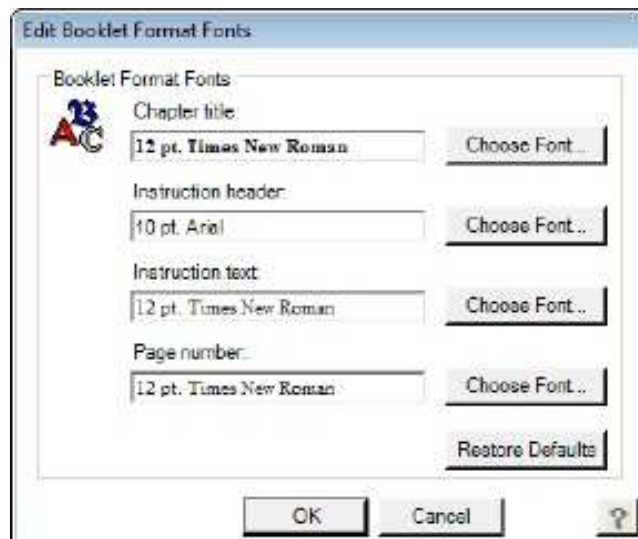
2. From the *Name* drop-down list, select the printer you want to set as the default for the program.
3. Set the *Paper* options and *Orientation* option as desired. (If necessary, you can access printer-specific options by clicking the **Properties** button to open the **Properties** window for the selected printer.)
4. Click **OK** to save and close.

Set the default fonts for printing

Generally speaking, the default fonts used in printed instructions are 12 pt. Helvetica, Times New Roman, or Arial regular and bold. If the court allows you to use different fonts, you can change the font preferences. You can set up different preferences for each format (e.g., Booklet).

To set the default fonts for printing

1. On the **Print** tab, go to the page for the format (such as **Booklet**) whose default fonts you want to set.
2. On the tab toolbar, click  **Edit Fonts**.
The **Edit Fonts** window (specific to the format you selected) opens.




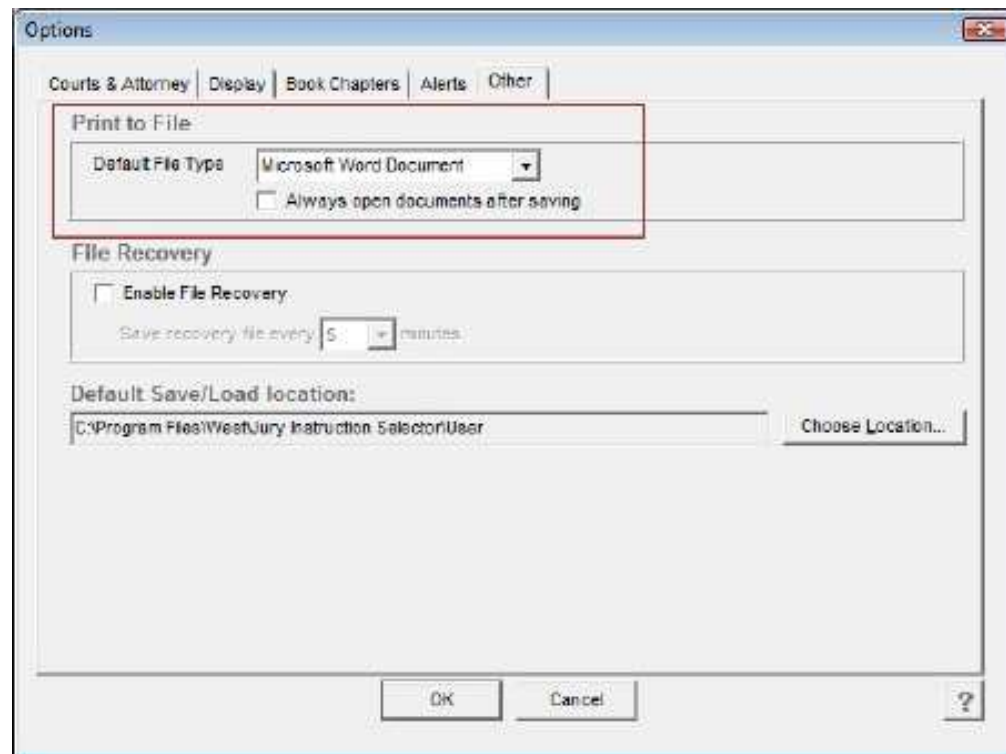
3. For each component whose font you want to change, do the following:
 - a. Click **Choose Font**.
A standard Windows **Font** window opens (not illustrated).
 - b. Change the font settings as desired.
 - c. Click **OK** to save and close.
4. When finished setting the default fonts, click **OK** on the **Edit Fonts** window to save and close.

Set the default print-to-file file type

With Jury Instruction Selector, you can "print" jury instructions to a word processing file (either Microsoft Word or Corel WordPerfect) or to a PDF file. Use the following procedure to specify the default file type you want the program use. (For instructions on printing to a file, see page 97.)

To specify the default print-to-file file type

1. Click  **Options** on the main toolbar, or choose **Settings > Options**.
The **Options** window opens.
2. Switch to the **Other** tab.
3. In the *Print to File* section, select your preferred file type from the *Default File Type* drop-down list. Also, if you want always to view documents after the program creates them, select the *Always open documents before saving* check box.



4. Click **OK** to save and close.


Choose instructions for printing

The first step in getting ready to print jury instructions is to select which ones you want to print, including refused and withdrawn instructions. You do this on the **Print** tab's **Choose Instructions** page.

To choose instructions for printing

1. On the **Print** tab, go to the **Choose Instructions** page.
The lists at the left show the Selected Instructions (including refused and withdrawn ones), while the list at the right shows what will be your print list.
2. Select the instructions you want to include and, if desired, arrange them in the order in which you want them to print. Use the following techniques:
 - Use **Add Selected** to add selected instructions from the *Available Instructions* list and/or *Refused/Withdrawn Instructions* list to the *Included Instructions* list. Use **Add All** to add all of the instructions to the *Included Instructions* list.

NOTE: By default, only the titles of included refused and withdrawn will be printed. If you want to print the text of these instructions, select the *Print text of refused / withdrawn instructions* check box.

- Use **Remove Selected**, **Remove All**, and **Remove Ref/Wdrn** to remove individual or all instructions from the *Included Instructions* list.
- To rearrange the order of the included instructions, use the **Move** buttons . To re-sort the instructions in numeric order, use **Re-sort in Numeric Order**. (Your order of instructions here overrides the order of instructions on the **Jury Instructions** tab's **Chapters/Sort** page for this printing only.)

3. When finished selecting, you are ready to select the format and set its various options. See "Set format options for the print job," next page.

Set format options for the print job

The second step in getting ready to print jury instructions (after choosing instructions to include; see previous page) is to set the options for the desired format. You do this on one of the format pages of the **Print** tab.

To set format options for the print job


1. On the **Print** tab, select the page of the format you want to use, such as **Single Page** or **Booklet**.
2. As desired, set the options on the format's page
 - Single Page page (page 80)
 - L.A. County Forms page (page 81)
 - Booklet page (page 82)
 - Pleading page (page 84)

You are now ready to print, preview, or print the instructions to a file.

Print jury instructions

Use the following procedure to print your jury instructions.

To print jury instructions

1. Choose which instructions you want to print (see previous page) and set format options (see above).
2. Click  **Print** on the page toolbar of the print format you selected. For the Single Page, Los Angeles County, and Booklet formats, a message appears to ask you to confirm that you want to remove brackets and bracketed text. Respond as needed.




A standard Windows **Print** window opens (not illustrated).

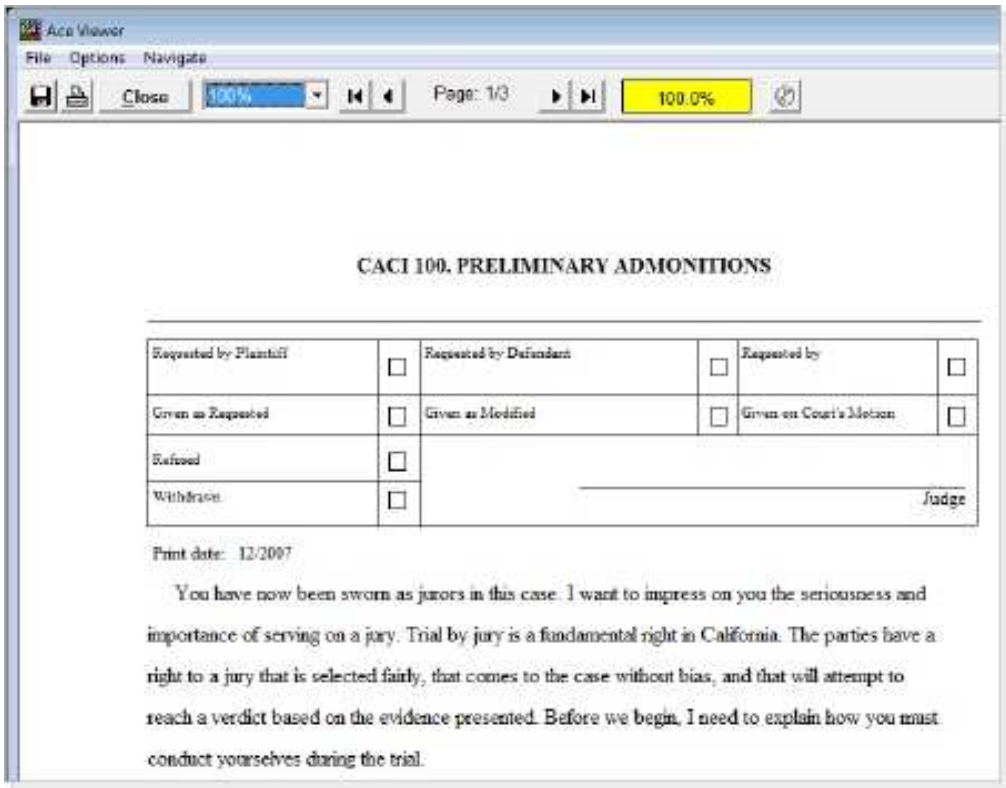
3. Select print options (e.g., number of copies, print range) as needed and click **OK**.

Preview before printing

Use the following procedure to preview your jury instructions before printing them.

To preview instructions before printing

1. Choose which instructions you want to preview (see previous page) and set format options (see above).
2. When ready to preview, click  **Print Preview** on the tab's toolbar.
The print preview window opens.




3. Use the print preview window's toolbar buttons to navigate through the document. (You can also print it from this window, if desired.)
4. Click **Close** to close the preview window.

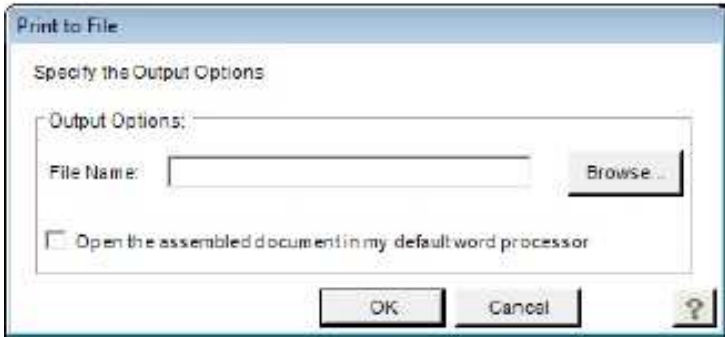
Print instructions to a file

Use the following procedures to "print" your jury instructions to a word processing or PDF document.

NOTE: If you print instructions using Booklet format to a word processing file and elect to include a Table of Contents and/or Index, the page numbers will not appear to be present when the file is first generated. However, it is easy to reveal the page numbers, using your word processor's specific features. See the FAQ "Where are the page numbers in the Table of Contents or Index in my RTF file?" in the Help system.

To print to a file

1. If you have not already set up your preferred print-to-file file type, see "Set the default print-to-file file type," page 94 before continuing.
2. Choose which instructions you want to print (see page 95) and set format options (see previous page).
3. Click  **Print to File** on the tab's toolbar. The **Print to File** window opens.




4. In the *File Name* box, type the name of the file you want to create. (The file will be saved to the default save location, but if you wish to save it elsewhere, use the **Browse** button to navigate to a different location.)
5. If the file will be saved as a word processing file and if you'd like to view it right away, select the *Open the assembled document in my default word processor* check box.
6. When ready, click **OK**.

Print an individual instruction

Use the following procedure to print the text of an individual Master Instruction or Selected Instruction. You might find it especially useful to print an edited Selected Instruction to review it with a relevant party.


To print an instruction's text

1. View the Master Instruction (page 59) or open the Selected Instruction for editing (page 64).
2. Click  **Print Text** on the window's toolbar. If you are trying to print a Master Instruction, the **Print Text** window (not illustrated) opens so you can specify if you want to print the instruction only, the Commentary only, or both.

Print an instruction's Commentary

Use the following procedure to print an instruction's Commentary.

To print an instruction's Commentary


1. View an instruction's Commentary (page 60).
2. Click  **Print Text** on the window's toolbar. The **Print Text** window (not illustrated) opens so you can specify if you want to print the instruction only, the Commentary only, or both.

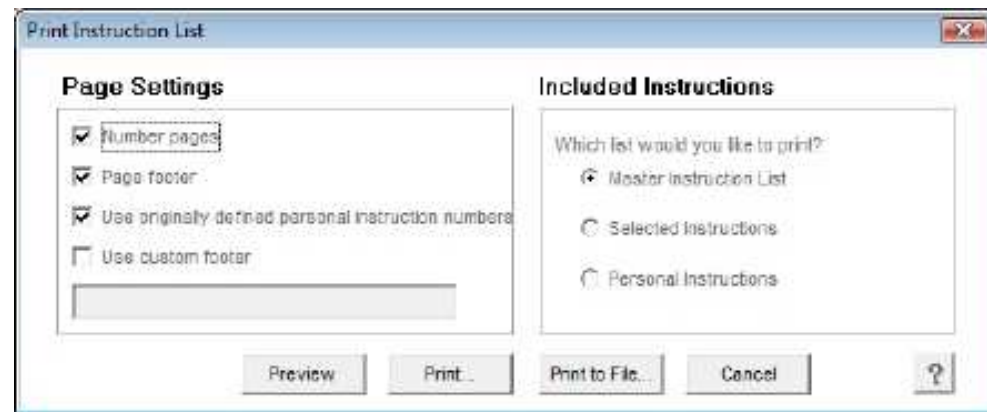
Print a list of instructions

Use the following procedure to print a list of Master Instructions, Selected Instructions, or Personal Instructions. (Alternatively, you can elect to preview the list or print the list to a file.)

NOTE: To print the Master Instructions for civil cases, be sure that a civil-case instruction file is open. To print Master Instructions for criminal cases, be sure that a criminal-case instruction file is open.

To print a list of instructions

1. On any page of the **Jury Instructions** tab, click  **Print Instruction List**, or choose **File > Print Instruction List**.
The **Print Instruction List** window opens.



2. Select the desired page settings.
3. Select which instructions you want to include, e.g, *Selected Instructions*.
4. Click **Preview**, **Print**, or **Print to File** as desired.

CHAPTER 7. CREATING PERSONAL INSTRUCTIONS

This chapter explains how to create custom instructions, called *Personal Instructions*. Once created, they can be selected for inclusion in an instruction file and edited with case information just the same as *Selected Instructions* based on *Master Instructions*.

About Personal Instructions	101
Start a new Personal Instruction	101
Open a Personal Instruction for editing	103
Define the text of the Personal Instruction	104
Add auto-populate fields to a Personal Instruction	106
Add gender phrases to a Personal Instruction	107
Edit the title, header, and/or authorities of a Personal Instruction	108
Delete a Personal Instruction	109
Renumber a Personal Instruction	110

About Personal Instructions

Personal Instructions are custom instructions created by Jury Instruction Selector users. They are similar to *Master Instructions* in that, once created, they can be selected for inclusion in any instruction file. They can include bracketed text and blanks, auto-populate fields, and even gender phrases such as "he/she." Once selected for inclusion in an instruction set, a *Personal Instruction* can be edited just like any other *Selected Instruction*.

But *Personal Instructions* differ in these ways:


- Their "master versions" can be edited (with the exception of their numbers).
- They have no Commentaries (although they may have authorities).
- They are not included in any searches conducted with the *Search* feature.

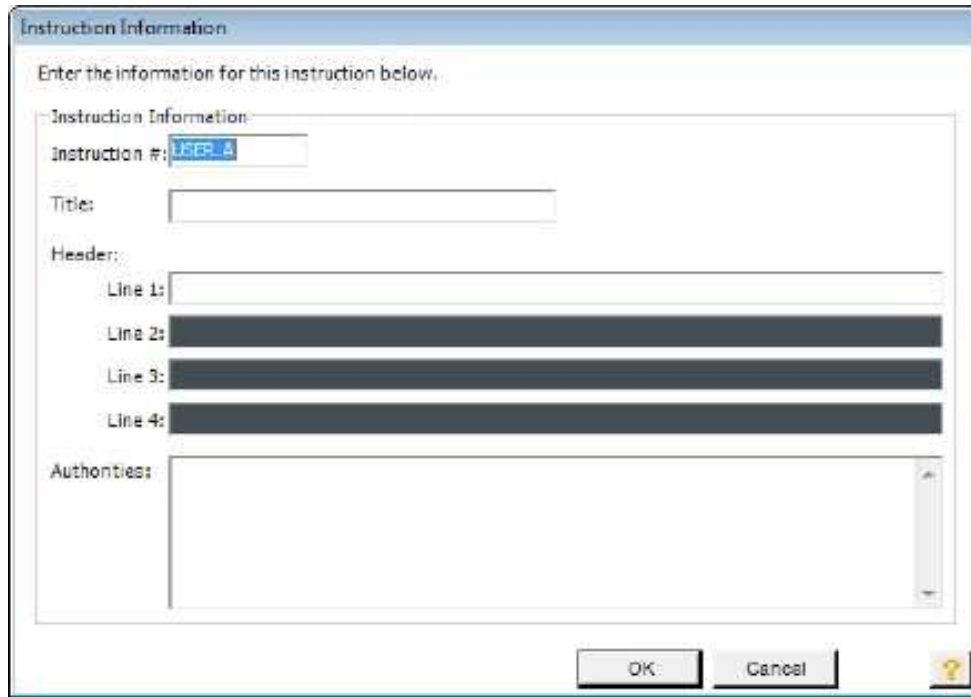
NOTE: After adding *Personal Instructions*, and assuming that you will want to use the Booklet format for printing, consider adding a default chapter to contain them. For more information, "Set up chapter defaults," page 23. For more information on the Booklet format, see "Booklet format," page 87 and "Booklet page," page 82.

Start a new Personal Instruction

Jury Instruction Selector differentiates between civil *Personal Instructions* and criminal *Personal Instructions*. Before starting a new *Personal Instruction*, be sure to open a case of the type you want the *Personal Instruction* to be. For example, to start a civil *Personal Instruction*, be sure that a civil case is open. It doesn't matter whether or not you want to select the new *Personal Instruction* for inclusion in the open case.

To start a new Personal Instruction

1. Open a case of the type (e.g., civil or criminal) for which you want to create a Personal Instruction.
2. Go to the **Jury Instructions** tab's **Personal Instructions** page.
3. Click  **New Personal Instruction** on the page's toolbar.
The **New Instruction** window opens, over which is imposed the **Instruction Information** window.



4. In the *Instruction #* box, type a unique number (up to 10 characters) that will identify this Personal Instruction. The default is USER.A. The number you enter cannot duplicate the instruction number of an existing Master Instruction or Personal Instruction. *Once you save the instruction, you will not be able to edit this number.*

NOTE:

(1) We recommend that you begin a Personal Instruction's number with a letter in order to avoid any numbering conflict when new Master Instructions are added to Jury Instruction Selector, although this is not a requirement. In the event that a Master Instruction added in a future version of the program has the same number as a Personal Instruction, you will not be able to select both instructions for inclusion in the same instruction set. You should recreate the Personal Instruction with a new unique number. (See "Rename a Personal Instruction," page 110.)

(2) If you plan to print a group of Personal Instructions in one chapter of a booklet of jury instructions, give them similar numbers. Chapters are printed by a range of numbers, not by individual instruction numbers.

5. In the *Title* box, type the title of the Personal Instruction. This title will appear in the title bar of the window in which the instruction is viewed or edited.
6. In the *Header: Line 1* box, type the header of the Personal Instruction. This header will appear in the instruction's row on pages of the **Jury Instructions** tab. (You may enter up to three more lines for the header.)
7. Authorities are needed only for instructions that will be printed on Form 176. To add authorities, type the applicable citation in the *Authorities* box, such as "Smith v. Covell (1980) 100 Cal.App.3d 947, 960 [161 Cal.Rptr. 377]" as it will appear in the Authorities box on Form 176.


8. Click **OK** to save and close.
You are now ready to define the text of the Personal Instruction. (See "Define the text of the Personal Instruction," next page.)

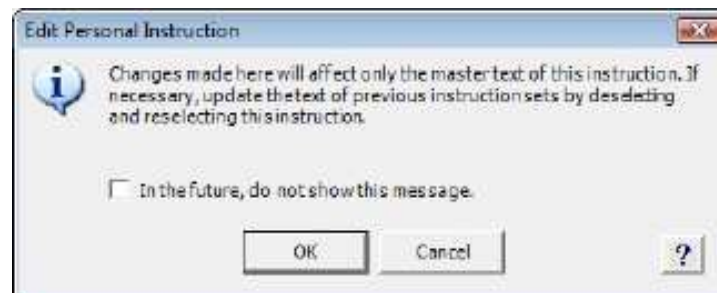
Open a Personal Instruction for editing

Unlike Master Instructions, whose "master text" cannot be edited, you can edit the master version of a Personal Instruction.

NOTE: If the Personal Instruction has been selected for inclusion in any instruction sets, the Selected Instruction versions of the instruction will not be affected by your edits. You may need to deselect and reselect the instruction in those instruction sets to ensure that they include the most up-to-date version.

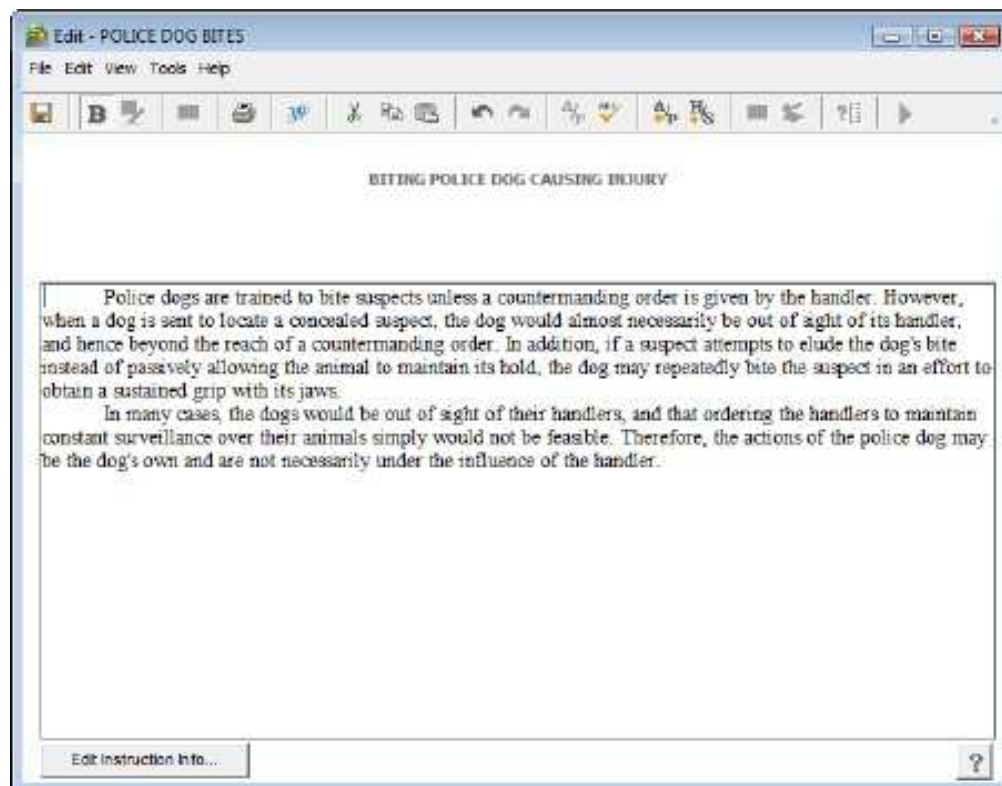
To open a Personal Instruction for editing

1. Open a case of the type (e.g., civil or criminal) that is the same as the type of Personal Instruction you want to edit.
2. Go to the **Jury Instructions** tab's **Personal Instructions** page.
3. Highlight the Personal Instruction you want to edit. (Don't click it, as that will select/deselect it for the open case.) Click  **Edit Personal Instruction** on the page's toolbar.
An information message appears to remind you that you are about to edit the master version of the instruction. Click **OK** to dismiss the message.



4. On the **Edit** window that opens, you may now edit the Personal Instruction, using the

techniques covered elsewhere in this chapter.



Define the text of the Personal Instruction

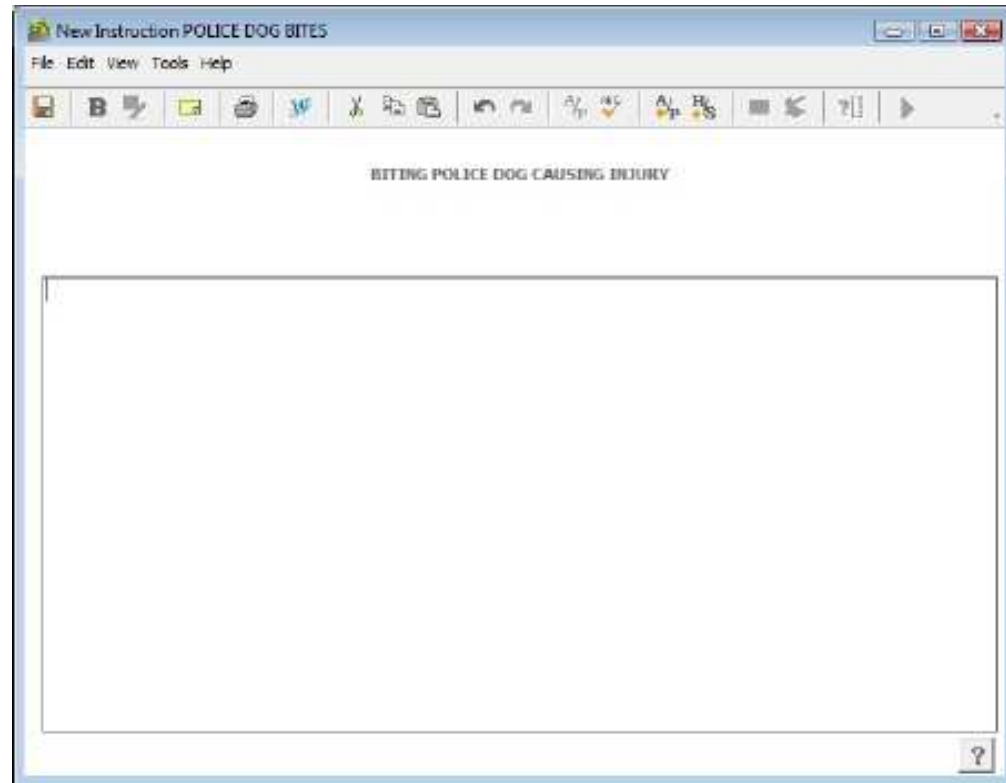
To define the text of a Personal Instruction, you can type directly in the **New Instruction** window or **Edit** window, or you can paste in text from elsewhere. You can even include blanks in an instruction where text is to be supplied for a specific case.






TIP: You might find it convenient to compose the text with a word processor and then copy and paste the text into the Personal Instruction.

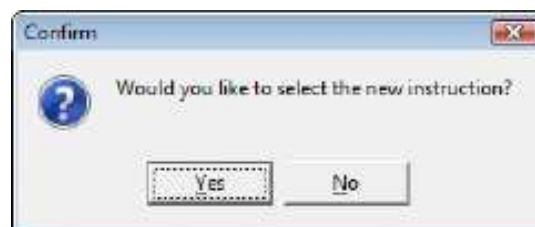
To define the text of a Personal Instruction

1. Do either of the following:
 - Open a Personal Instruction for editing (previous page). The **Edit** window will be open.
 - Start a new Personal Instruction (page 101) and define the instruction information. When you have finished that, the **New Instruction** window will be open.

The two windows are essentially identical.



2. Type or paste the instruction's text. It's good practice to include a tab space at the beginning of each paragraph. Also, you can include blanks (created by pressing **Shift –**) up to 20 characters long where text is to be supplied later.
3. To check your spelling, click  **Spell Check** to open the **Spell Checker** window. (For details, see "Check spelling," page 69.)
4. To add an auto-populate field from the program's collection of such fields, click  **Add Auto-Populate Tag** to open the Add an **Auto-Populate Field** window. (For details, see "Add auto-populate fields to a Personal Instruction," next page.)
5. To add a gender phrase such as "he/she," click  **Add Gender Tag** to open the **Add Gender Phrase** window. (For details, see "Add gender phrases to a Personal Instruction," page 107.)
6. To save the instruction text, click  **Save**.
 - If this is an existing instruction, the **Edit** window remains open so you can make more edits. (To close the window, click .)
 - If this is a new instruction, the **New Instruction** window closes, and a confirmation message appears to ask if you want to select the instruction for the open case. Respond appropriately.



Add auto-populate fields to a Personal Instruction


You can easily add auto-populate fields from the program's collection of fields to a Personal Instruction.

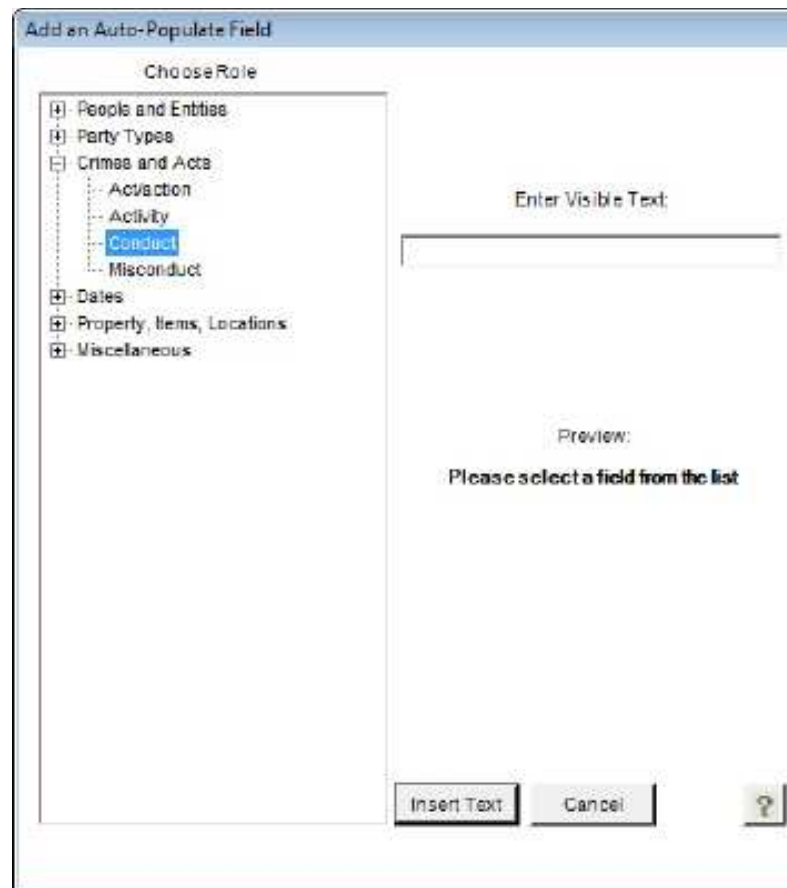
When the Personal Instruction is selected for inclusion in an instruction set, the *Auto-Populate* feature can be used to populate the fields with the appropriate case information. (If you add auto-populate fields for parties (People and Entities), consider also adding gender phrases. See "Add gender phrases to a Personal Instruction," facing page.)

To add an auto-populate field to a Personal Instruction

1. If you are editing an existing Personal Instruction, the **Edit** window will be open. If you are creating a new Personal Instruction, the **New Instruction** window will be open. The two windows are essentially identical.
2. Position the insertion marker where you want to place the auto-populate field. If you inadvertently position it within another auto-populate field, a warning message appears. Click **OK** to dismiss the message and reposition the insertion marker.



3. Click  **Add Auto-Populate Tag** on the window's toolbar. The **Add an Auto-Populate Field** window opens, showing the different types of fields at the left.
4. Expand the type of field you want to add, such as *Crimes and Acts*. Then select a specific field, such as *Conduct*.



5. In the *Enter Visible Text* field, type the field's text as you want it to appear in the instruction. The *Preview* area shows how the field will appear in the instruction.

NOTE: As a best practice, we recommend that this text indicate the purpose of the field and that you frame the text with brackets. For example, if you were inserting the *Conduct* field, the visible text should be something like "[nature of conduct]" or "[criminal conduct]".

6. When ready to add the field to the instruction, click **Insert Text**.
The auto-populate field is added to the instruction.

TIP: If you added a *People and Entities* field, also consider adding gender phrases to the instruction. (See "Add gender phrases to a Personal Instruction," below.)

7. Click  **Save** to save your edits.


Add gender phrases to a Personal Instruction

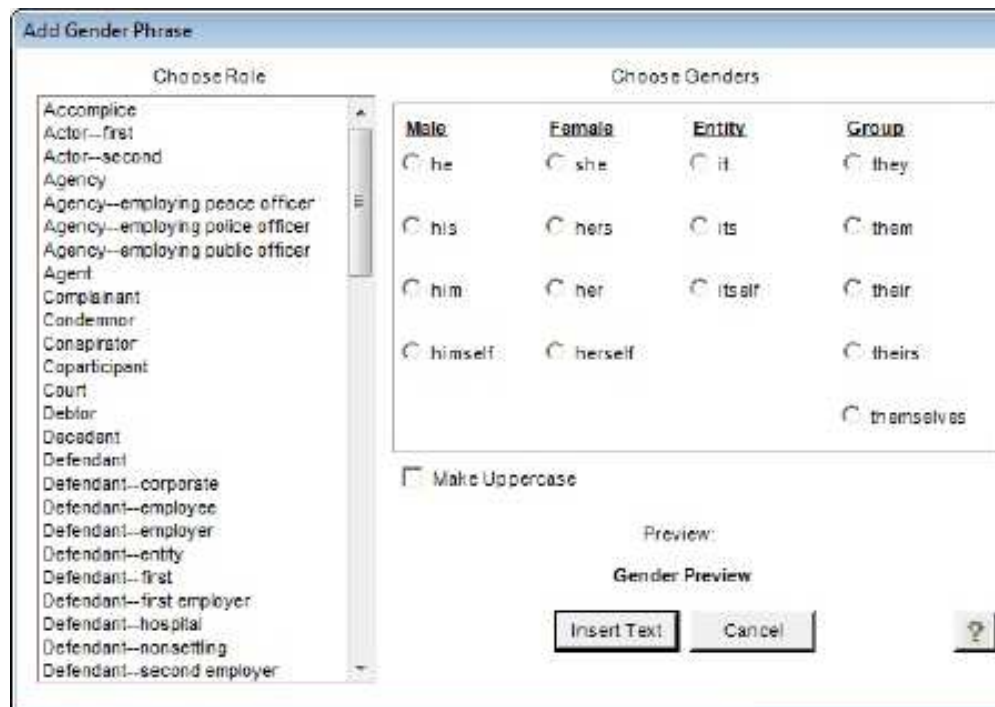
You can easily add gender phrases such as "he/she" to a Personal Instruction. Gender phrases are another form of auto-populate fields, and you should add them whenever you've also added auto-populate fields for parties (persons and entities). When the Personal Instruction is selected for inclusion in an instruction set, the *Auto-Populate* feature can be used to replace the gender phrases with the proper wording, based on the parties' roles.


To add a gender phrase to a Personal Instruction

1. If you are creating a new Personal Instruction, the **New Instruction** window will be open. If you are editing an existing Personal Instruction, the **Edit** window will be open. The two windows are essentially identical.
2. Position the insertion marker where you want to place the gender phrase. If you inadvertently position it within another auto-populate field, a warning message appears. Click **OK** to dismiss the message and reposition the insertion marker.



3. Click  **Add Gender Tag** on the window's toolbar.
The **Add Gender Phrase** window opens, showing the different types of fields at the left.



4. From the *Choose Role* list, select the role for which you want to add a gender phrase.
5. Under *Choose Genders*, select all of the words you want to include in the gender phrase. The program will separate them with slashes. For instance, to achieve "he/she," select *he* and *she*. The *Preview* area shows how the gender phrase will appear in the instruction.
6. If the words should be uppercase, such as for the beginning of a sentence, select *Make Uppercase*.
7. When ready to insert the phrase into the instruction, click **Insert Text**.
The gender phrase is added to the instruction.
8. Click  **Save** to save your edits.

Edit the title, header, and/or authorities of a Personal Instruction

You can edit the title, header, and/or authorities of a Personal Instruction (but not its instruction number).

NOTE: If the Personal Instruction has been selected for inclusion in any instruction sets, the Selected Instruction versions of the instruction will not be affected by your edits. You may need to deselect and reselect the instruction in those instruction sets to ensure that they include the most up-to-date version.

To edit the title, header, and/or authorities of a Personal Instruction

1. Open the Personal Instruction for editing. (See page 103.)
2. On the **Edit** window, click **Edit Instruction Info**.
The **Instruction Information** window opens.


3. Edit any of the fields as needed.
4. Click **OK** to save and close.

Delete a Personal Instruction

You may delete any Personal Instruction from Jury Instruction Selector's database. Bear in mind that you will be deleting the master version of the Personal Instruction so that it will no longer be available for use in any instruction sets.

NOTE: If the Personal Instruction is currently selected in the open instruction file, deleting it will automatically remove it from the file as well. However, if it is included in any other saved file, it will remain in those files. If you open one of those files, the deleted Personal Instruction will be added back into the Personal Instructions.

To delete a Personal Instruction

1. On the **Jury Instruction** tab's **Personal Instruction** page, highlight the Personal Instruction you want to delete.
2. Click  **Delete Instruction** on the page's toolbar.
An information message appears.

3. Click **OK** to dismiss the message.
The Personal Instruction is now deleted from the database. If it had been included in the open instruction file, it is removed from it as well.

Renumber a Personal Instruction

With each new version of Jury Instruction Selector, new Master Instructions may have been added to the program's database. When that happens, it is possible that a new Master Instruction's number might now conflict with an existing Personal Instruction's number. In the event that you try to include a Master Instruction and Personal Instruction with the same number in the same instruction file, the program will display an error message and will not allow you to select the second instruction.

The solution to this situation is to assign a new number to the Personal Instruction. However, strictly speaking, it is not possible to renumber an existing Personal Instruction. Instead, you need to recreate the Personal Instruction as a new instruction with a new unique number and then delete the old version. You can then select the new version for inclusion in your instruction file.

To renumber a Personal Instruction

1. Open the master version of the old Personal Instruction as if to edit it. Select all of its text and copy that text elsewhere for temporary holding, such as in a text file or a word processing file. Also click the **Edit Instruction Info** button to open the **Instruction Information** window, where the instruction's title, header, and authorities are stored. Copy the text of these items also to the temporary holding file. Close the Personal Instruction.

NOTE: If the instruction included any auto-populate fields and/or gender phrases, those items will be "flattened" to become only text. You will need to recreate them in the new instruction.

2. Create a new Personal Instruction. On the **Instruction Information** window, assign the instruction a new, unique number. Paste in the title, header, and authorities from the temporary holding file. On the **New Instruction** window, paste in the instruction text from the temporary holding file. In needed, recreate any auto-populate fields and/or gender phrases. Save and close the new Personal Instruction.
This new Personal Instruction is now available for selection for inclusion in your instruction file.
3. Delete the old Personal Instruction.

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