

# Top 10 Tips for Better Note-Taking in Legal Research

BY PENNY A. HAZELTON, PEGGY ROEBUCK JARRETT, NANCY MCMURRER,  
AND MARY WHISNER

## 1. DO A REFERENCE INTERVIEW

If you are doing research for another person, be sure you summarize what you think the person has asked you to do, determine when the project is due, ask if there is a financial limit on the project, and find out what kind of product you must produce (e.g., a client letter, a memo, a bibliography, a list). In many cases it may be appropriate to solicit strategies, sources, or search terms. The more information you can gather the better. Reference interviews, which are the process of finding out this information, are not just for librarians!

## 2. PREPARE TO CITE

Keep track of what you will need in order to cite whatever you find. It is not necessary to have all the semicolons and commas in place, but you do need to know enough about citation format to know, for example, whether you need the author's first name, or a book's copyright date or edition. You will be wise to take a minute to check a citation manual if you are citing a source you do not use often. Get in this habit and ALWAYS write down citation information—regardless of whether you are excited about what you have found or you think it will not be used. You do NOT want to be staring at a deadline and then realize you have a number of gaps to fill in!

## 3. NOTE SEARCH TERMS

Before you turn on your computer or start pulling books off the shelves, note the key terms and phrases that characterize your research problem. Think about which ones to try in the various paper sources and which might be useful in various computer databases. This is a particularly important step for anyone who is doing research for another person. As you go through your research, write down new terms you find. Of course, it can be tedious to write down every single term you try in every index. You might have a list of terms, and quickly check them off. Or write down the terms that work. Or the ones that fail. Highlight the ones that seem to work the best, but do not limit your research to them since what works in one source may not work in another.

## 4. NOTE YOUR CONTACTS

To whom have you talked? Record names, titles, organizations, and phone numbers. Were they helpful? Will they be sending you something? When? Will you want to use that contact again (should you add them to your Rolodex)?

## 5. TAKE GOOD CALR NOTES, TOO

If the databases you use frequently have a built-in way to keep track of what searches you have done, always remember to exercise that option. Use all the technology at your disposal! Every printout should contain a notation of the search you performed, the database you worked in and the date of your search. If the system cannot automatically add this information, be sure you write it on the printout itself.

## 6. ANNOTATE YOUR PHOTOCOPIES

The moment you read or even scan a photocopy, make a note on the copy, or highlight a piece of text, so you can glance at it quickly to tell where it fits into your research project. And, of course, get in the habit of checking to see that all the elements of a complete citation appear on the copy. If not, take a minute to write down all the pertinent information. Copying only a portion of a case, an article, or a book can really cause identification problems later. It does you little good to know the citation to the case you copied is 654 N.E.2d 35 if you do not also know the date of decision, court, and parties, particularly if you cannot get back to the library or into the online database to look at it again to verify the correct information.

## 7. REMEMBER TIME IS OF THE ESSENCE

Be sensitive to how current each source you use is. If you will be working on the project for a while (or someone else will be looking at your research results next month or next year), you need to note coverage information, for example:

1. shep thru 12/95 pamph.
2. RCWA 1996 pock. pt. (covers '95 reg. legis. sess.)
3. WESTLAW searches 12/29/95

## 8. KEEP THE REQUESTER INFORMED

Should the project take more time than anticipated, do not hesitate to get back to the requester and find out if you should stop or spend more time. Be ready to explain (from your excellent notes) what you have done and what you have left to do. Make a note of the conversation and date it.

## 9. ORGANIZE YOUR NOTES

Once the project is complete, resist the tendency to head for the recycle bin, or, more likely, to toss the notes in a pile on your office floor. Take a few moments to spruce them up. If there was a cover memo, attach it on top of the notes. If there was not, write a quick one to the file, so you can tell at a glance what the project was about. File your research notes by requester or by topic or by whatever system will enable you to find them again.

## 10. CONSIDER DESIGNING YOUR OWN TEMPLATE

If you tend to have a number of projects going on at the same time, you may want to design your own research cover sheet. A cover sheet can be the place for your general, summary notes; using colored paper prevents a request from becoming intermingled with the research on another project. Decide what sorts of information you need for most of your assignments and make yourself a form. Possibilities for the form include:

1. dates (when the research was assigned and when it is due)
2. requester's name, telephone number and e-mail address
3. description of the request
4. how to charge costs (to a client, to a particular account)
5. what form the results should take (e.g., citations list, memo, telephone call)
6. method of delivery and destination (e.g., put on desk, chair, mailbox)

The rest of the page is left blank so you can note contacts you have made, terms for searching, databases or sources already tried, etc. If you now need to contact the requester, all the basic information about the project is at your fingertips without your having to shuffle through papers. ♦

© 1995 Penny A. Hazelton, Peggy Roebuck Jarrett, Nancy McMurrer, and Mary Whisner