LexisNexis (Lexis+) Legal Research Step-by-Step How-To Guide for Paralegal Students

by Roger Batchelor

This comprehensive guide walks you through the essential skills needed to conduct professional-level online legal research using Lexis+ (LexisNexis). Mastering these tools will help you succeed in legal writing courses and prepare you for practical research tasks in professional legal practice.
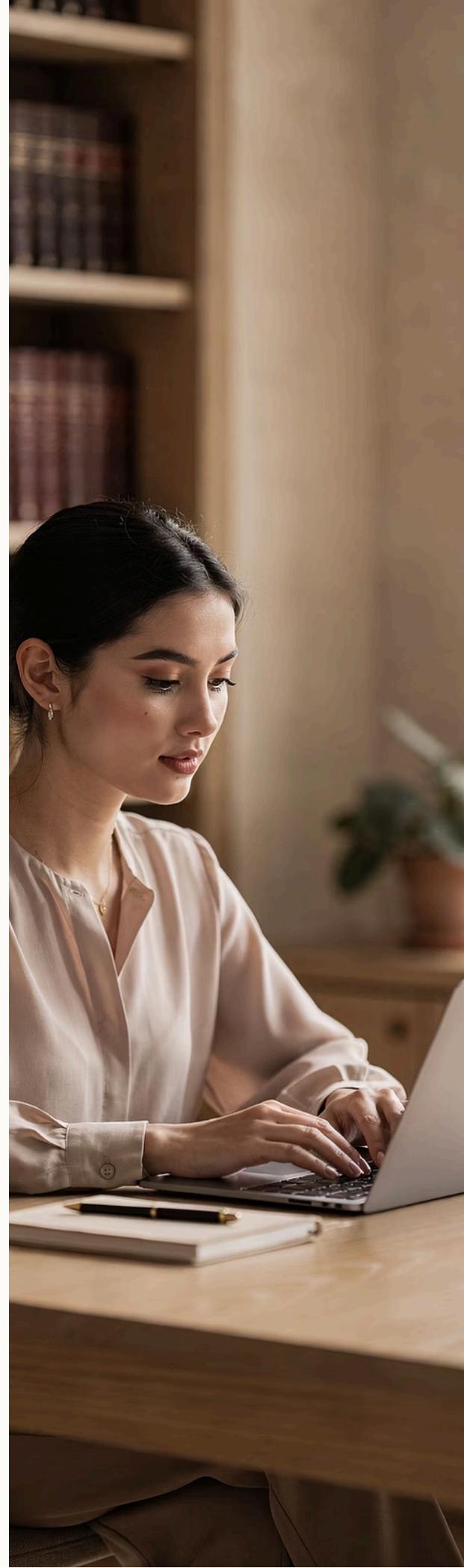
Why Learn Lexis+ Legal Research?

Becoming proficient in Lexis+ is essential for every law student and practicing attorney. This powerful platform provides comprehensive access to legal materials that form the foundation of competent legal practice. Understanding how to navigate Lexis+ efficiently will save you countless hours and improve the quality of your legal analysis.

The skills you develop using Lexis+ translate directly to professional practice, where thorough and accurate research can make the difference between winning and losing a case. Employers expect new attorneys to arrive with working knowledge of major legal research platforms, making this a critical competency for your legal career.

🗋 Core Capabilities You'll Master

- Locate relevant statutes and legislation across jurisdictions
- Find case law and judicial opinions efficiently
- Access secondary sources such as treatises and practice guides
- Validate authority using Shepard's Citations
- Conduct efficient, professional-level legal research

Start With a Solid Research Plan

Before diving into Lexis+, successful legal research requires careful planning. Taking time to clarify your research parameters will save hours of unfocused searching and ensure you find the most relevant authority. A well-defined research plan acts as your roadmap, keeping you focused on the legal issues that matter most to your assignment or case.

1 | Subject Matter

What legal issue are you researching? What facts are known? Identifying the core legal question and relevant facts helps you select appropriate search terms and jurisdictions.

2 | Jurisdiction

Federal, state, or provincial? Which court level matters? Jurisdiction determines which laws apply and which courts' decisions carry binding authority.

3 | Scope and Deadline

How deep must the research go? When is it due? Understanding the depth required helps you allocate time appropriately between different research stages.

🗋 **Example Research Scenario:** Criminal prosecution of a homeless individual in Illinois. Possible issue: criminal trespass to real property. Jurisdiction: Illinois state courts. Deadline: Two weeks for comprehensive memo.

The Core Legal Research Strategy

Every successful legal research project follows a proven sequence that ensures thoroughness and efficiency. This three-step approach has been tested by generations of legal professionals and provides the foundation for competent legal analysis. Following this sequence prevents common pitfalls like missing controlling authority or citing overruled cases.

Secondary Sources
Textbooks, encyclopedias, practice guides

Primary Authority
Statutes and case law

Validation
Confirm authority with Shepard's citator

This systematic process works for every legal research assignment, from first-year memos to complex appellate briefs. Secondary sources provide context and terminology, primary authority supplies binding law, and validation ensures your citations remain good law. Never skip steps—each builds on the previous one to create a complete and reliable research foundation.

Logging In and Interface Overview

Accessing Lexis+ is straightforward, but familiarizing yourself with the interface will accelerate your research efficiency. Navigate to **plus.lexis.com** and enter your institutional credentials. Most law schools provide student access with full features, giving you the same tools used by practicing attorneys.

Upon logging in, you'll see the main search bar prominently displayed at the top of the screen, along with a navigation menu that provides access to specialized research tools. The clean interface is designed to minimize distractions while maximizing functionality. Take a few moments to explore the menu options, including History, Folders, and Advanced Search features.

The dashboard also displays recently accessed documents and suggested content based on your research patterns. These features help you pick up where you left off and discover related materials you might have missed.

🗅 First Login Checklist

- Verify your credentials work properly
- Locate the main search bar
- Find the navigation menu
- Identify the History button
- Locate Advanced Search options
- Check for any tutorial prompts

Natural Language Search Method

Natural language search functions similarly to familiar search engines like Google, making it an accessible entry point for new researchers. Simply type a phrase or question into the search bar, such as "criminal trespass Illinois," and press Search. Lexis+ uses artificial intelligence to interpret your query and return relevant results organized by category.

Advantages	Disadvantages
• Fast and intuitive	• Large number of results
• No special syntax required	• Less precision than Boolean
• Good starting point for unfamiliar topics	• May miss specific authority
• Returns diverse result types	• Requires more filtering

Results appear categorized by secondary sources, cases, statutes, and more. This categorization helps you quickly navigate to the type of authority most relevant to your research stage. While natural language search is convenient, you may need to refine results using filters or transition to Boolean search for greater precision.

Terms and Connectors (Boolean Search)

Boolean search provides precision and control that natural language searching cannot match. By using specific connectors between search terms, you can craft queries that return highly targeted results. This method is essential for advanced research where you need to find specific legal concepts or narrow down large result sets.

Understanding Boolean operators transforms you from a casual searcher into a power user. While the syntax requires some learning, the improved accuracy and efficiency make this investment worthwhile. Most experienced legal researchers prefer Boolean search for complex research questions.

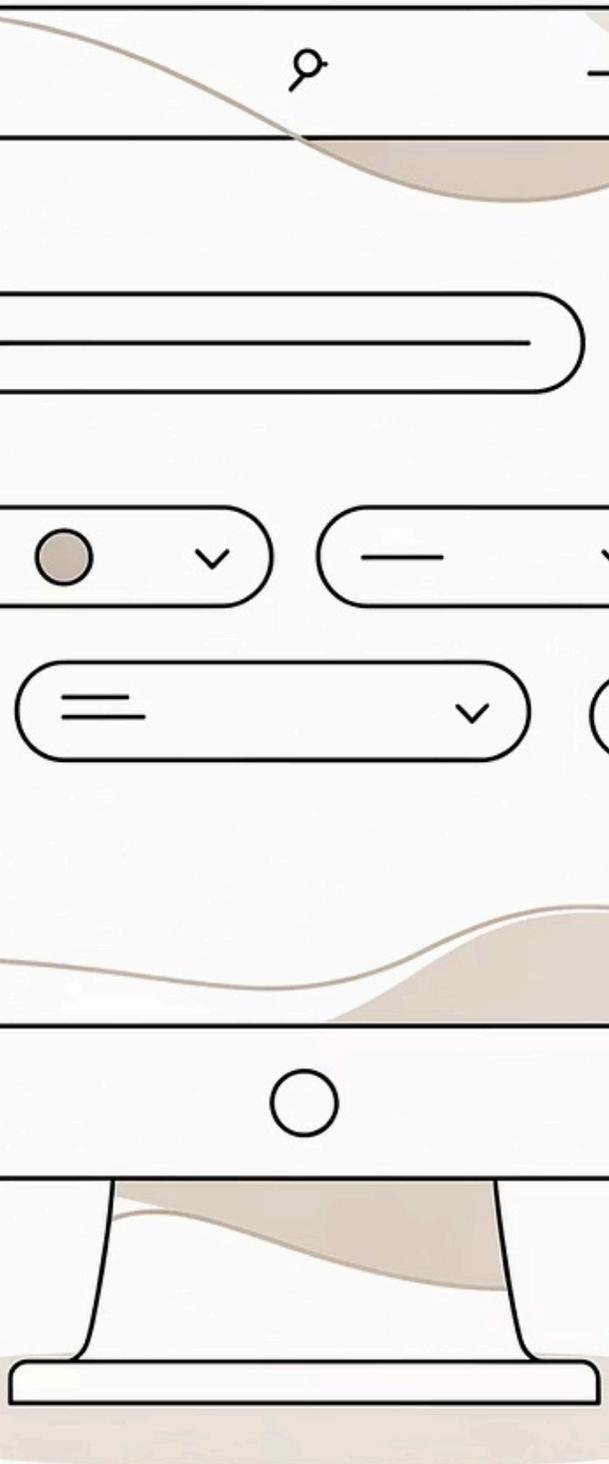| Connector	Purpose	Example
OR	Broadens search by finding any term	house OR home OR residence
AND	Narrows search by requiring all terms	property AND trespass
/n	Proximity—terms within n words	property /10 trespass
W/n	Terms within n words, any order	criminal w/5 intent
PRE/n	First term precedes second by n words	negligent pre/3 misrepresentation

📝 **Example Boolean Query:** (house OR home OR residence OR property) /10 "criminal trespass" - This finds documents where housing-related terms appear within 10 words of "criminal trespass"

Advanced Search Templates

For researchers who want Boolean precision without memorizing syntax, Lexis+ offers Advanced Search templates. Click Advanced Search under the search bar to access pre-built forms that automatically construct Boolean queries as you fill in the fields.

These templates include fields for party names, judges, dates, courts, keywords, and more. As you complete each field, Lexis builds the Boolean string in the background, showing you the resulting query. This feature serves as both a research tool and a learning aid, helping you understand how Boolean syntax works.

Advanced Search templates are particularly useful for case law research where you know specific details like party names, citation information, or the deciding court. They eliminate syntax errors while maintaining the precision of Boolean searching.

Understanding Search Tools and Features

Lexis+ provides sophisticated tools to help you understand and refine your search results. These features transform raw search results into actionable intelligence, helping you quickly identify the most relevant documents and adjust your strategy when needed.

Search Tree

Visual diagram of your Boolean search showing how connectors affected results. This tree structure helps you understand why certain documents appeared and guides refinement of complex queries.

Search Term Maps

Color-coded bars show where your search terms appear within documents. Quickly scan these visual indicators to identify the most relevant sections before reading full text.

Dynamic Filters

Left panel filters let you narrow by jurisdiction, content type, date range, and practice area. Apply multiple filters simultaneously to zero in on precisely the authority you need.

Tracking Your Research History

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Why History Matters

Lexis+ automatically records your activity, creating a valuable research trail. This feature prevents duplicated effort, helps you retrace successful searches, and provides documentation of your research thoroughness.

Your history serves as both a checklist and a safety net, ensuring you don't miss important sources and allowing you to recover searches even after closing your browser.

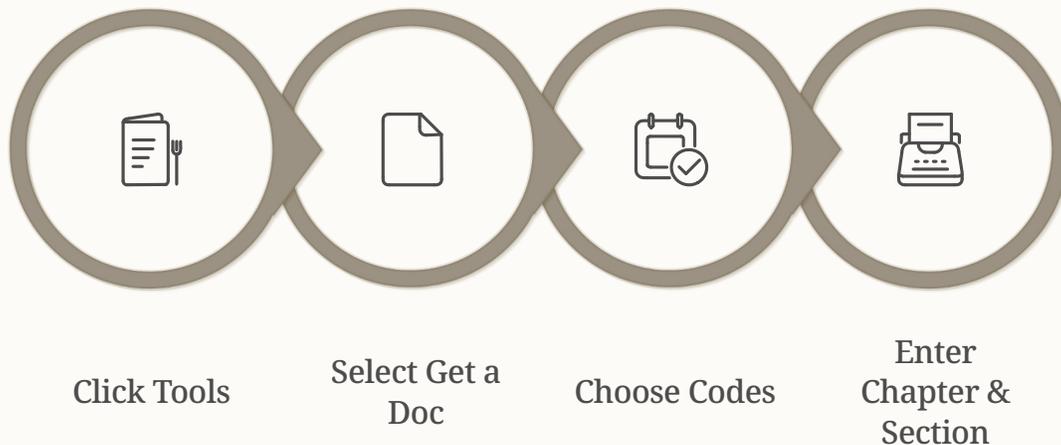## Accessing Your Research Trail

Click the **History** button in the top right corner to view your recent searches and accessed documents. Lexis+ maintains up to 90 days of research activity, organized chronologically with options to filter by date, document type, or search terms.

Use this feature strategically throughout your research project. At the beginning, check history to avoid redundant searches. During research, review what you've covered to identify gaps. At the end, verify you've explored all necessary sources before concluding your project.

History also helps when supervisors or professors ask about your research methodology. You can demonstrate the thoroughness of your approach by showing the breadth of sources you consulted.

Finding Statutes: Method 1 - Get a Doc

When you have a specific statute citation, the fastest retrieval method is Get a Doc. This feature bypasses search algorithms and takes you directly to the statutory text, saving valuable research time. It's particularly useful when working from a case that cites specific code sections or when a professor provides exact citations.

Click Tools	Select Get a Doc	Choose Codes	Enter Chapter & Section

After selecting Get a Doc from the Tools menu, you'll see options for different document types including cases, statutes, administrative materials, and secondary sources. Choose **Statutory Codes**, then enter the chapter and section number in the format appropriate to your jurisdiction. For example, Illinois statutes use formats like "720 ILCS 5/21-3" while federal statutes use "42 USC 1983." Lexis understands various citation formats and will retrieve your document even with minor formatting variations.

Finding Statutes: Multiple Methods

01

Method 2: Direct Citation Entry

Type the abbreviated citation directly into the main search bar. No punctuation or symbols needed—Lexis interprets the citation automatically. Example: type "42 USC 1983" and press enter.

02

Method 3: Browse Annotated Code

Search for "[State name] statutes" and select the Annotated Code result. Use the Table of Contents to browse by subject matter, or search within the code using keywords. Annotated codes include invaluable additions like legislative history, amendments, case notes, and practice references.

03

Method 4: Broad Search with Filters

Search your topic using natural language or Boolean, then filter results to "Statutes & Legislation" using the left panel. Select your jurisdiction, then narrow further to codes. This method works best when you're uncertain about exact citations or exploring a topic broadly.

> 🗒 **Annotated Code Advantage:** Always use annotated versions when available. The case notes and practice pointers provide context that bare statutory text cannot offer, often leading you to controlling case law you might otherwise miss.

Expanding Your Statutory Research

Once you've located a relevant statute, your research has just begun. Statutes exist within a broader legal ecosystem, and understanding how courts interpret and apply statutory language is essential for complete analysis. Lexis+ provides powerful tools for expanding your statutory research beyond the bare text.

Review History

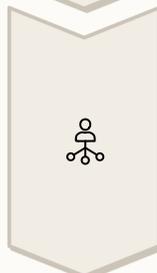Examine amendments and prior versions to understand legislative intent and evolution

Read Case Notes

Study headnotes summarizing how courts have interpreted specific statutory provisions

Use Citing Decisions

Find all cases that have cited your statute, filtered by jurisdiction and issue

Explore Related Statutes

Navigate to connected code sections that may affect interpretation or provide additional authority

Finding Case Law Efficiently

Case law forms the backbone of common law legal analysis, and Lexis+ provides multiple pathways to find relevant judicial opinions. The method you choose depends on what information you have at the start of your research—whether you know the case name, have a citation, or are searching by topic.

Search by Case Name

Type the party names in this format: **Party v Party**. Lexis suggests matches as you type, using predictive text to help you select the correct case. This works even with partial names or common misspellings. Once you select a case, Lexis displays the full opinion along with citation information and related documents.

Search by Citation

Enter the volume, reporter abbreviation, and page number in a simple format. Example: **452 US 161**. Lexis recognizes standard legal citation formats and retrieves the document immediately. This method works for federal and state reporters, as well as specialized reporters.

Narrowing Case Results

When searching by topic rather than specific case, use filters strategically to manage result volume:

- **Jurisdiction** - Federal circuits, state courts, specific appellate districts
- **Date Range** - Recent cases for current doctrine, historical for evolution of law
- **Court Level** - Supreme courts for binding precedent, trial courts for persuasive authority
- **Practice Area** - Criminal, civil, family, tax, etc.
- **Procedural Posture** - Summary judgment, appeal, trial

Applying multiple filters simultaneously creates a focused result set that matches your specific research needs.

Reading a Case Effectively

Understanding how to read and extract information from cases efficiently is a critical lawyering skill. Lexis+ structures cases to facilitate quick comprehension while preserving the complete judicial opinion. Learning to navigate these sections strategically will dramatically improve your research speed and accuracy.

Case Summary

Begin with the quick overview at the top, providing parties, facts, issues, and holding in condensed form

Headnotes

Review numbered paragraphs identifying legal principles and holdings—use these to assess relevance quickly

Full Opinion

Read the complete judicial reasoning before citing— summaries never substitute for full text analysis

Page References

Note bracketed star numbers showing reporter page breaks for accurate pinpoint citations

📝 **Critical Rule:** Always read the full opinion before citing a case in your work. Headnotes are research tools created by editors, not the court. Relying solely on summaries can lead to mischaracterization of holdings and embarrassment in practice.

Advanced Case Tools: Citations and Copying

Copying with Proper Citations

Lexis+ streamlines the citation process with advanced copying tools. Highlight any text within a case, then select **Copy Advanced** from the menu. This feature automatically includes the pinpoint citation in proper Bluebook format, eliminating manual citation construction and reducing errors.

The tool recognizes different citation styles and adjusts formatting accordingly. For law review articles, select law review format. For court filings, choose practitioner format. This flexibility ensures your citations match the requirements of any assignment or jurisdiction.
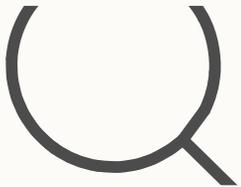
Saving and Organizing Cases

The folder icon allows you to save important cases to personal folders organized by topic, assignment, or client matter. Create a logical folder structure at the beginning of your research to avoid losing track of valuable sources. You can add notes to saved documents, tag them with custom labels, and share folders with colleagues.

The printer icon generates a clean PDF suitable for printing or electronic filing. PDFs preserve all formatting, citations, and page numbers, creating a permanent record even if the online version changes.
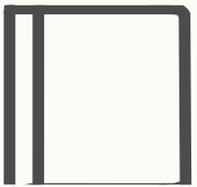
Using Headnotes to Expand Research

Headnotes represent one of Lexis+'s most powerful research expansion tools, yet many students underutilize this feature. Each headnote identifies a specific legal principle or point of law from the case, linked to a comprehensive topic and key number system. This classification allows you to find every other case addressing the same legal issue.

To leverage this feature, identify a headnote that captures the exact legal issue you're researching. Click on the legal topic within that headnote, which appears as a blue hyperlink. Select **Get Documents** to retrieve all cases classified under that topic. The results will include cases from your jurisdiction addressing identical or analogous legal questions.

Find Similar Cases

Retrieve cases addressing the same legal principle across jurisdictions or time periods

Discover Related Authority

Uncover secondary sources, treatises, and practice guides discussing your legal issue

Navigate Topic Hierarchy

Explore broader and narrower topics to understand doctrinal context and evolution

Shepard's Citations: Validating Authority

Shepard's Citations serves as the quality control mechanism for legal research, ensuring that every authority you cite remains good law. Failing to Shepardize can result in professional embarrassment, malpractice liability, or sanctions from the court. This tool tracks the subsequent history and treatment of every case and statute in the Lexis database.

Signal Indicators

When you Shepardize a case, Lexis displays a signal indicator that immediately communicates its current status.

Red Stop Sign

Indicates the case has been overruled, reversed, or vacated—meaning you cannot rely on it as precedent.

Yellow Triangle

Signals caution: some portion of the case has been questioned, criticized, or limited by subsequent decisions.

Green Diamond

Indicates positive or neutral treatment.

What Shepard's Tracks

- Subsequent history of your case
- Treatment by later courts
- Depth of analysis in citing cases
- Related administrative materials
- Secondary source discussions

Critical Practice Rule

Always Shepardize before citing. This applies to every case, statute, and regulation you rely upon in your analysis. Citing bad law damages your credibility and can have serious professional consequences. Make Shepardizing a non-negotiable final step in your research process.

Best Practices for Legal Research Excellence

Developing systematic habits separates competent researchers from excellent ones. These best practices, refined through decades of professional legal research, will serve you throughout law school and practice. Internalizing these principles transforms research from a mechanical task into a strategic process that consistently produces thorough, reliable results.

Start Broad, Then Narrow

Begin with secondary sources and natural language searches to understand the landscape, then use Boolean and filters to target specific authority.

Read Full Opinions

Never cite based solely on summaries or headnotes. Mischaracterizing holdings undermines your analysis and credibility.

Validate Every Authority

Shepardize each case and statute before citing. No exceptions. Bad law citations can result in professional sanctions.

Save Important Sources

Use folders to organize findings by topic or assignment. Add notes about relevance while details are fresh in your mind.

Track Research History

Review your history regularly to avoid duplicating efforts and identify gaps in coverage.

Prioritize Secondary Sources

Treatises and practice guides provide context, terminology, and citations to primary authority. Start here for unfamiliar topics.

Final Research Checklist

Before submitting any legal research assignment or relying on your research for practice, systematically verify you've completed each essential step. This checklist serves as quality assurance, ensuring your research meets professional standards. Missing even one step can undermine an otherwise excellent analysis. Print or save this checklist and use it for every research project throughout law school and your legal career.

1 — Secondary Sources Reviewed

Consulted treatises, encyclopedias, or practice guides to understand doctrinal context and identify search terms

2 — Statutes Located and Expanded

Found controlling statutes, reviewed case notes and history, explored related code sections

3 — Cases Identified and Read Fully

Located relevant cases, read complete opinions (not just summaries), analyzed holdings in context

4 — Authority Validated with Shepard's

Shepardized every case and statute, verified no negative treatment, confirmed current good law status

5 — Citations Checked

Verified all citations comply with Bluebook or assigned citation manual, included proper pinpoint cites

6 — Research History Reviewed

Examined research trail to confirm comprehensive coverage, identified and filled any gaps in analysis

Congratulations! You now have the foundational skills to conduct professional-level legal research using Lexis+. Practice these techniques consistently, and they will become second nature. Remember that research is an iterative process—expect to refine your approach as you gain experience. The investment you make in mastering these tools will pay dividends throughout your legal career.