

## Practitioner Onboarding: Getting Started

### Logging In

1. Visit <https://research.ceb.com/login/> to login.
2. Enter your username and password and click Log In.



#### Log In

CEB.com Username or Email

Password

Forgot Password?

Log In

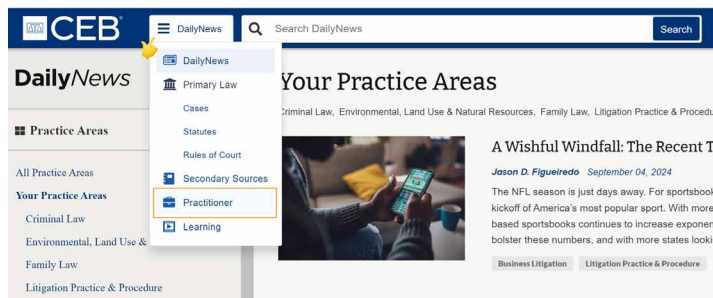
First time signing in to the new CEB?

You may enter your existing CEB.com username in the email field to login.

Don't have an account yet?
[Try CEB First!](#)

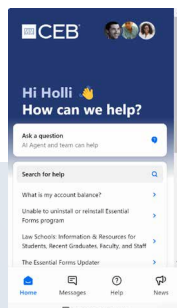
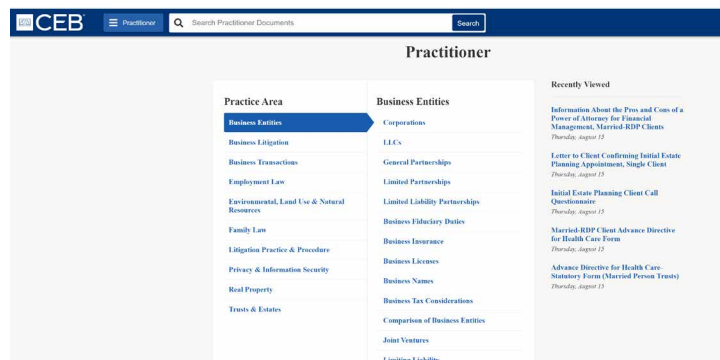
### Getting to Practitioner™

3. Once logged in, click on the 3 lines and select Practitioner.



### Using Practitioner

4. From the Practitioner main page, search using key terms or browse through by practice area and sub-category.



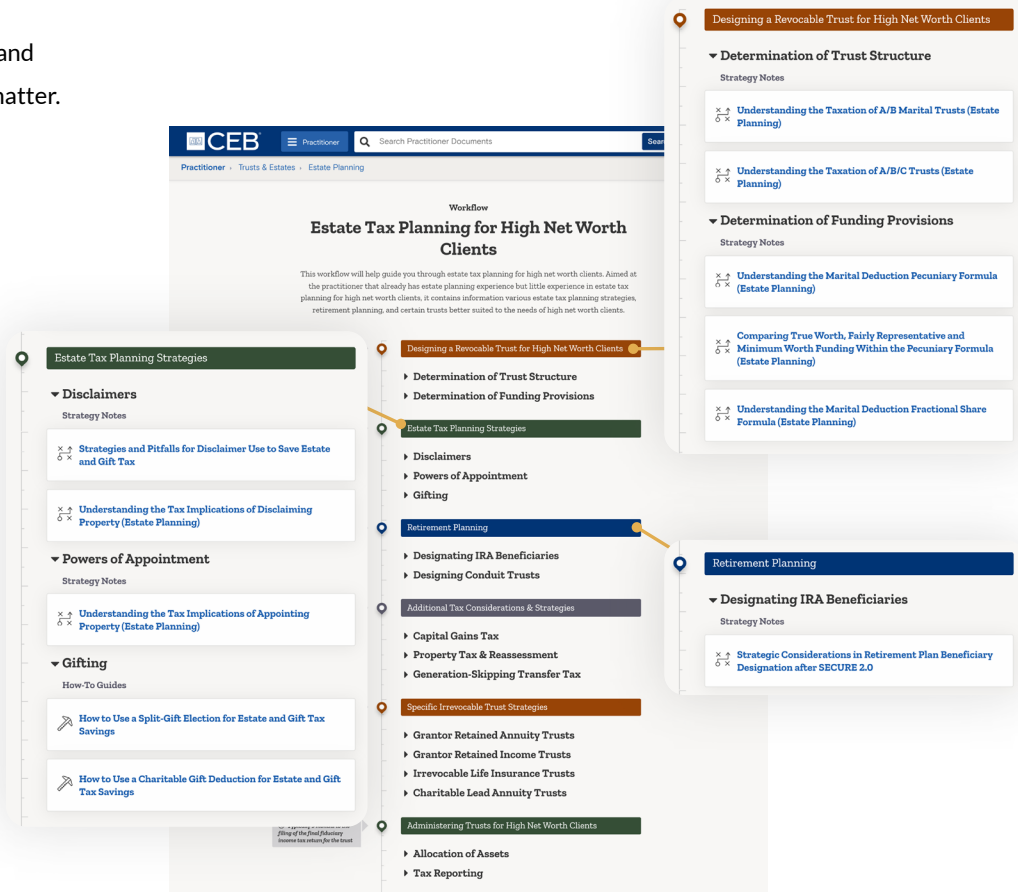
If you have questions while using Practitioner, click on the chat icon in the bottom right of the screen. You can speak with an agent by putting your question in the “Ask a question” box or do your own search in the gray “Search for help” box.

5. From there, you can start using Practitioner's **Workflows, How-To Guides, Strategy Notes, Charts & Checklists and Standard Documents.**

The screenshot shows the CEB Practitioner website interface. At the top, there's a navigation bar with 'Practitioner' and a search bar. Below the navigation bar, the 'Estate Planning' section is highlighted. It features a grid of workflow cards, each with a title and a brief description. The workflows include 'Estate Tax Planning for High Net Worth Clients', 'Probate Avoidance, High Net Worth, and Advanced Estate Planning Techniques', 'Estate Planning: Married Person Trusts', and 'Estate Planning: Single Person Trusts'. Below the grid, there's a section for '128 documents in Practitioner' with filters for 'How-To Guides', 'Strategy Notes', 'Charts & Checklists', and 'Standard Documents'. A list of documents is shown, including 'How to Determine the Optimum Funding and Terms for a Charitable Lead Annuity Trust (CLAT)', 'How to Record a Trust Transfer Deed for a Single Person's Trust', and 'How to Record a Trust Transfer Deed, Married and RDP Clients'.

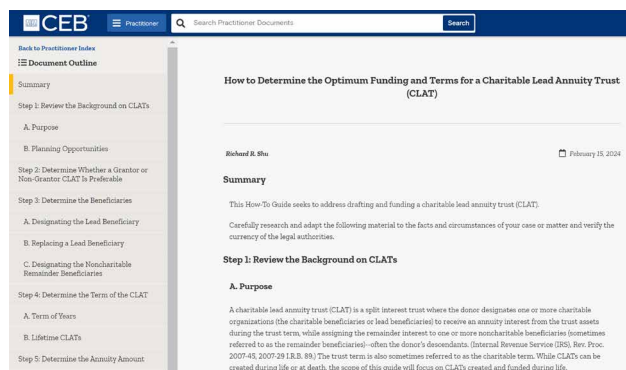
## Workflows

Review a comprehensive roadmap and timeline for the entirety of a legal matter.



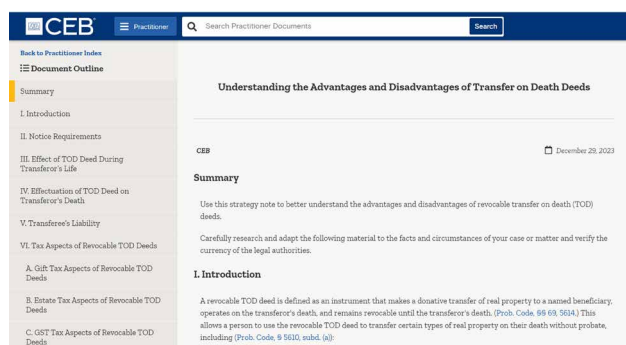
## How-To Guides

Streamline your legal process with clear, concise, step-by-step guidance, including Judge's perspective, practice notes, cautions, and examples.



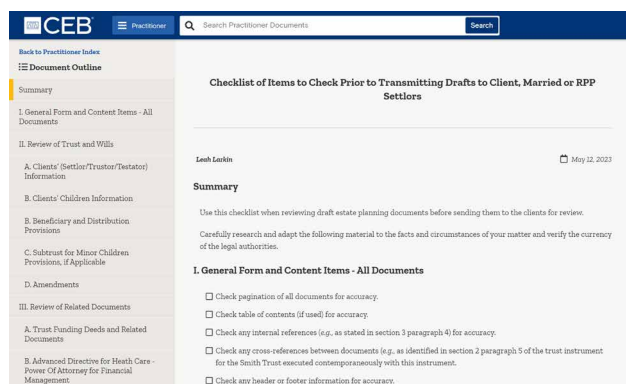
## Strategy Notes

Leverage insights from seasoned attorneys and judges with outlines of the key strategic and tactical considerations for analyzing new developments, approaching settlement negotiations, or advising your client.



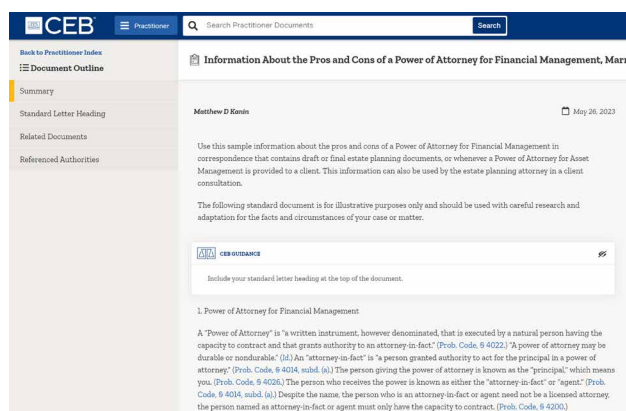
## Charts & Checklists

Quickly reference processes with flowcharts and review key tasks and outlines of statutes of limitations, relevant jury instructions, and more.



## Sample Documents

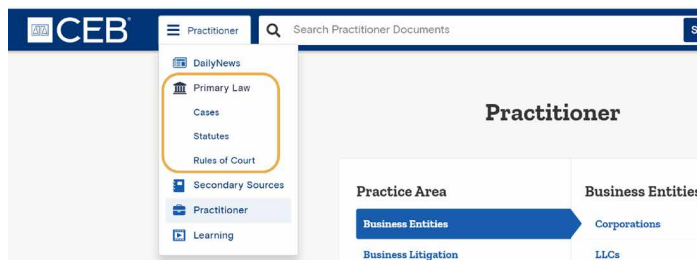
Draft unfamiliar motions using downloadable, high-quality templates, forms, and standard clauses with annotated sample documents from experienced California lawyers.



# Using CEB Primary Law & Secondary Sources

## Primary Law

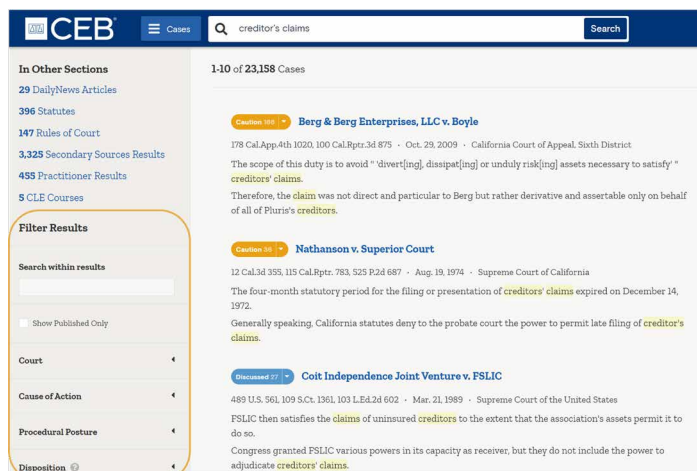
1. To use CEB's Primary Law, click on the 3 lines and select Cases, Statutes, or Rules of Court.



2. Enter your search term(s) in the search bar.

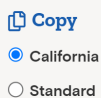


3. Use Filters to narrow your search. CEB's TrueCite® case citator flags will help you identify the most useful cases using color-coded flags.



Once you've found a statute or case law you want to use in your brief or other document, you can copy with cite by highlighting the text you want to copy and choosing between California style or Standard Bluebook style. When you paste the text into your document, the correct citation format will appear with the copied text.

for breach of fiduciary duty against the  
been alleged, on the pleaded facts the  
sonal liability on the alleged claims for  
ply affirm the judgment of dismissal. 1026



### Definition

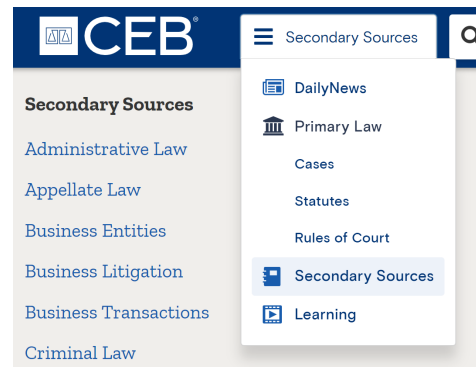
Negative	Indicates the case is no longer good on at least one point of law (e.g., disapproved, overruled, superseded, disavowed, or some other directly negative treatment.)
Warning	A subsequent case disputed the cited case's precedential value (e.g., criticized, limited, disagreed with, declined to extend, declined to follow, validity questioned.)
Caution	Indicates the case is good law, but is not binding due to different facts (e.g., distinguished, cited for contrast, not applicable.)
Neutral	Indicates the case is being cited or discussed for background legal principles or context; may also indicate more positive treatment, like upholding the case or relying on it.
No Treatment	Case has no citator treatment; either it is a new case or no subsequent cases have referenced it yet.

### Treatment Text

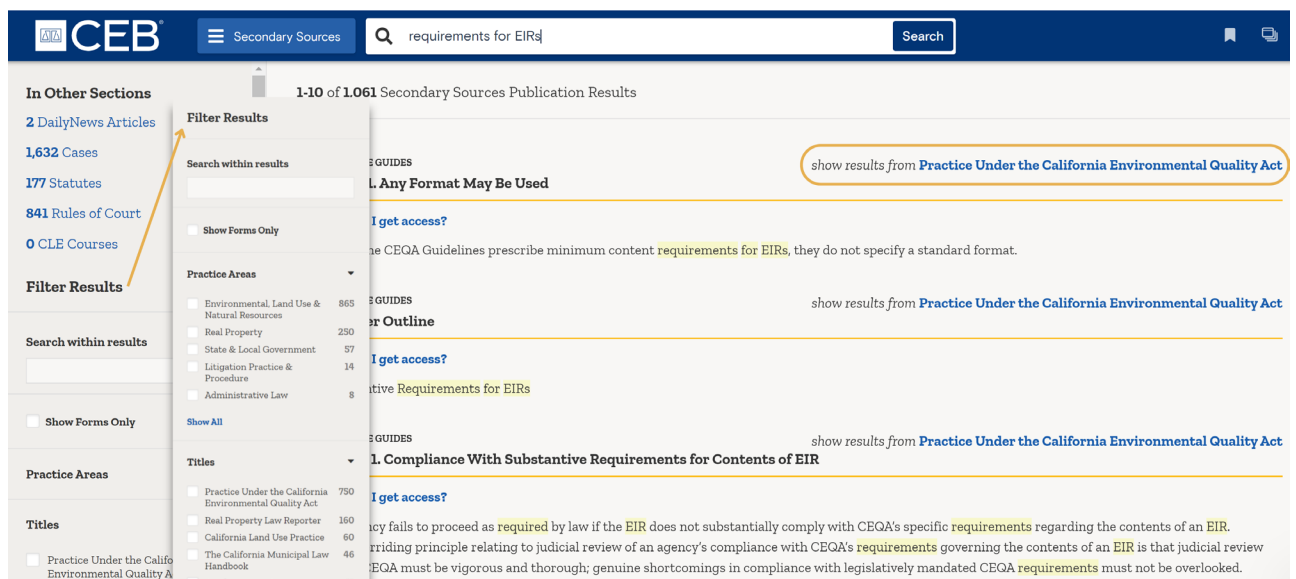
Abrogated by other case; Abrogated by Statute; Disapproved; Disapproved by other Case; Disavowed; Overruled; Overruled by other Case; Reversed; Reversed by other Case; Reviewed granted, Superseded by Constitutional Amendment; Superseded by Statute; Vacated; Vacated by other Case
Codified by Statute; Criticized; Criticized by other Case; Declined to Extend; Declined to Extend by other Case; Declined to Follow; Declined to Follow by other Case; Disagreed; Limited; Limited by other Case; Validity Questioned
Distinguish; Distinguished by other Case; Not Apply; Cited for Contrast
Discussed; Cited; Cited in Concurrence; Cited in Dissent; Cited in Secondary Opinion
New; Not Cited

## Secondary Law

1. Use CEB's practice guides by clicking on the 3 lines and selecting Secondary Sources.



2. (a) Filter your search by searching within the results, or by practice area, titles, or resource type.



- (b) Or, choose the appropriate area of law on the left side.

