

## EXPERT WITNESS RESEARCH CHECKLIST: FINDING POTENTIAL EXPERTS

This checklist includes main Tactic/information categories in **bold**, followed by recommended products/sources, sample searches and tips.

Since you are looking for the names of experts (names you do not already have), keep in mind that a main piece of this process is actually *reviewing* the documents to find potential experts. Once you have good candidates, consider using the Checklist covering “Starting with the Name of an Expert” to narrow down or confirm your choices.

### NOTES ON SEARCHING EXPERT NAMES ON LEXIS® AND LEXIS+™:

In general, unless otherwise specified: *First Name /2 Last Name*—e.g., *John /2 Doe*.

If a common name, be sure to add terms relating to profession and/or topic/area of expertise.

Updated on 6/21/2023

<b>Tactic</b>	<b>Product/Sources</b>	<b>Sample Search</b> (see top of chart for Lexis®/Lexis+™ name search)	<b>Tips</b>	✓
<b>Finding the Names of Experts in Expert Witness Materials</b>	<b>Lexis/Lexis+:</b> <a href="#">Expert Witness Materials</a>	<i>Expert /15 cybersecurity</i>  <i>Expert or doctor or professor or computer scientist /10 cybersecurity</i>	This will identify documents covering what experts know about the subject. Use appropriate terminology for professional titles and identifiers where appropriate.  Names of experts (and affiliations) will generally appear in the documents.  NOTE: CVs & Resumes are a good source, but you want to be sure to search the topic/subject of expertise in CVs and review the results.	
	<b>Lexis/Lexis+:</b> <a href="#">Directories</a>	<i>Cybersecurity or data breach or computer scientist</i>	Directories include a group of Expert Witness Directories, but some of the others (such as Newsworthy Person and Scientist directories) may also pay off. Search for the subject matter related to the area of expertise.	
	<b>Context:</b> Search by area of Expertise		Enter the area of expertise in the search box and choose the EXPERT module, then search to retrieve a list of experts.	
	<b>Lexis Product Liability Navigator™</b>		Both navigators will work by starting with the subject area or product.	

# Expert Witness Checklist: Finding an Expert

	<b>Lexis Medical Navigator®</b>			
<b>Finding the Names of Experts Referenced or Interviewed in News and Legal News Articles</b>	<b>Lexis/Lexis+:</b> <a href="#">News</a> , <a href="#">Legal News</a>	<i>expert /10 cybersecurity or data breach</i>	<p>Note that for all news sources, you may need to:</p> <ol style="list-style-type: none"> <li>1) Adjust the search to include profession specific titles (professor, doctor, neurosurgeon, computer scientist, etc.).</li> <li>2) Review relevant documents for names of the quoted/cited experts.</li> <li>3) If you want to make sure the phrase “expert witness” appears, use it either as a Search Within or with the actual search instead of the word “expert” (and be sure to increase the proximity number)</li> </ol>	
	<b>Nexis Newsdesk™</b>	<i>expert NEAR/10 (cybersecurity OR “data breach”)</i>		
	<b>Law360®</b>		<p><b>Law360</b> has Advanced Search options. Click the Advanced Search link under the Search button, then on the next screen click the Advanced options link under the search box. Then consider:</p> <ol style="list-style-type: none"> <li>1) Enter “expert witness” as well as any relevant subject terms in the “With all the words” box.</li> <li>2) Check the option to “Also search the text of article attachments” if you would like to search those as well.</li> <li>3) Use other search options if they are relevant.</li> </ol>	
<b>Finding the Names of Experts in Full-Text Opinions</b>	<b>Lexis/Lexis+:</b> <a href="#">Cases</a>		<p>Search for the appropriate topic/subject matter for which you are looking for a potential expert witness.</p> <p>Then conduct a Search Within for the phrase <i>expert witness</i> or terms describing the type of profession (e.g., neurologist, computer scientist, civil engineer, etc.).</p>	

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<b>Finding the Names of Experts in Jury Verdicts and Settlements</b>	<b>Lexis/Lexis+:</b> <a href="#">Jury Verdicts &amp; Settlements</a>		Tip for both products:  Search for the appropriate topic/subject matter for which you are looking for a potential expert witness.  Then conduct a Search Within for the term <i>expert</i> or terms describing the type of profession (e.g., neurologist, computer scientist, civil engineer, etc.).	
	<b>Lexis® Verdict &amp; Settlement Analyzer</b>			
<b>Finding the Names of Experts Listed/Referenced in Dockets</b>	<b>Lexis® CourtLink®:</b> Dockets & Documents	<i>Expert or witness /25 cybersecurity or data breach</i>	Keyword (terms & connectors) search in Dockets & Documents	
	<b>Lex Machina®</b>		The Expert Witness Explorer quick tool allows you to explore rulings on the admissibility of expert witness testimony and reports in Product Liability and Torts cases. Use the template to search by case type and judge and review for expert names mentioned	
<b>Finding Experts Who are Inventors of Relevant Products, Processes, or Designs</b>	<b>Lexis/Lexis+&gt;</b> Practice Area tab>Patent Law>Patent Registrations		Consider limiting searches to the Abstract and Claims sections using the Advanced Search template in Lexis/Lexis+.	
	<b>LexisNexis TotalPatent One®</b>		Searching by type of device or process will retrieve appropriate patents. Be sure to be fairly specific as to what you're looking for or review the titles for seemingly appropriate devices/processes.  Then review the patents for names of inventors.	

## Expert Witness Checklist: Finding an Expert

	<b>LexisNexis Patent Advisor®</b>		Patent image file wrappers are included. Some relevant datapoints: <ul style="list-style-type: none"><li>• Names of people who gave declarations during prosecution</li><li>• Names of attorneys involved in prosecuting a patent</li><li>• Subject matter research</li></ul>	
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*This toolkit specifically includes LexisNexis® products that legal professionals use for Expert Witness research purposes. Depending on the Expert Witness request and the LexisNexis products you subscribe to, portions of or all of the research suggestions in the checklist may be applicable.*

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