

CHICAGO MANUAL OF STYLE IP ENDNOTES

NAVIGATING CHICAGO MANUAL OF STYLE IP ENDNOTES: A COMPREHENSIVE GUIDE

CHICAGO MANUAL OF STYLE IP ENDNOTES ARE A CRITICAL ELEMENT FOR ACADEMIC AND PROFESSIONAL WRITERS ADHERING TO THE CHICAGO MANUAL OF STYLE (CMOS), PARTICULARLY WHEN CITING INTELLECTUAL PROPERTY OR SPECIFIC TYPES OF ONLINE RESOURCES. THIS GUIDE DELVES DEEP INTO THE INTRICACIES OF PROPERLY FORMATTING AND IMPLEMENTING ENDNOTES ACCORDING TO CMOS GUIDELINES, ENSURING ACCURACY AND CLARITY IN YOUR SCHOLARLY WORK. WE WILL EXPLORE THE FUNDAMENTAL PRINCIPLES OF ENDNOTE CREATION, THE UNIQUE CONSIDERATIONS FOR CITING INTELLECTUAL PROPERTY, AND THE PRACTICAL STEPS INVOLVED IN INTEGRATING THESE CITATIONS SEAMLESSLY INTO YOUR DOCUMENT. UNDERSTANDING THESE NUANCES IS PARAMOUNT FOR ANY WRITER SEEKING TO UPHOLD ACADEMIC INTEGRITY AND PROFESSIONAL STANDARDS.

TABLE OF CONTENTS

UNDERSTANDING ENDNOTES IN CHICAGO STYLE

THE PURPOSE OF ENDNOTES

DISTINGUISHING BETWEEN NOTES AND BIBLIOGRAPHY

GENERAL PRINCIPLES FOR CHICAGO STYLE ENDNOTES

CRAFTING CHICAGO MANUAL OF STYLE IP ENDNOTES

DEFINING INTELLECTUAL PROPERTY (IP) IN THE CONTEXT OF CITATIONS

CITING PATENTS AND PATENT APPLICATIONS

CITING TRADEMARKS AND COPYRIGHTED MATERIAL

CITING SOFTWARE AND DIGITAL CONTENT

SPECIAL CONSIDERATIONS FOR ONLINE RESOURCES WITH IP ASPECTS

PRACTICAL APPLICATION: FORMATTING CHICAGO MANUAL OF STYLE IP ENDNOTES

STRUCTURE OF AN ENDNOTE FOR IP

ESSENTIAL ELEMENTS OF AN IP ENDNOTE

EXAMPLES OF CHICAGO MANUAL OF STYLE IP ENDNOTES

CITING A U.S. PATENT

CITING A TRADEMARK REGISTRATION

CITING A COPYRIGHTED DIGITAL IMAGE

CITING SOFTWARE DOCUMENTATION

TROUBLESHOOTING COMMON ISSUES WITH IP ENDNOTES

ENSURING CONSISTENCY AND ACCURACY

WHEN TO USE ENDNOTES VS. FOOTNOTES

THE ROLE OF DIGITAL OBJECT IDENTIFIERS (DOIs) AND URLS

UNDERSTANDING ENDNOTES IN CHICAGO STYLE

ENDNOTES, AS EMPLOYED BY THE CHICAGO MANUAL OF STYLE, SERVE AS A SOPHISTICATED SYSTEM FOR ATTRIBUTING SOURCES AND PROVIDING SUPPLEMENTARY INFORMATION OUTSIDE THE MAIN BODY OF A TEXT. THEY ARE A CORNERSTONE OF ACADEMIC WRITING, ALLOWING AUTHORS TO ACKNOWLEDGE THE WORK OF OTHERS WHILE MAINTAINING A CLEAN AND UNCLUTTERED NARRATIVE FLOW. UNLIKE FOOTNOTES, WHICH APPEAR AT THE BOTTOM OF THE PAGE, ENDNOTES ARE COLLECTED AT THE END OF A CHAPTER OR THE ENTIRE WORK, OFFERING A COMPREHENSIVE LIST OF REFERENCES FOR THE READER TO CONSULT.

THE PURPOSE OF ENDNOTES

THE PRIMARY PURPOSE OF ENDNOTES IS TO CITE SOURCES THAT HAVE BEEN CONSULTED AND USED IN THE CREATION OF A WRITTEN WORK. THIS INCLUDES DIRECT QUOTATIONS, PARAPHRASED IDEAS, AND FACTUAL INFORMATION THAT IS NOT COMMON KNOWLEDGE. BEYOND MERE ATTRIBUTION, ENDNOTES CAN ALSO BE USED TO OFFER ADDITIONAL COMMENTARY, EXPLANATIONS, OR DIGRESSIONS THAT MIGHT INTERRUPT THE MAIN TEXT BUT ARE VALUABLE TO THE READER. THIS DUAL FUNCTION MAKES THEM A VERSATILE TOOL FOR ACADEMIC AND PROFESSIONAL WRITING.

DISTINGUISHING BETWEEN NOTES AND BIBLIOGRAPHY

IT IS CRUCIAL TO UNDERSTAND THE DIFFERENCE BETWEEN ENDNOTES AND A BIBLIOGRAPHY, AS PRESCRIBED BY THE CHICAGO MANUAL OF STYLE. WHILE BOTH PROVIDE SOURCE INFORMATION, THEIR SCOPE AND PURPOSE DIFFER. ENDNOTES ARE SPECIFIC REFERENCES TO INDIVIDUAL SOURCES USED WITHIN THE TEXT, PROVIDING PRECISE LOCATION INFORMATION LIKE PAGE NUMBERS. A BIBLIOGRAPHY, CONVERSELY, IS A COMPREHENSIVE LIST OF ALL SOURCES CONSULTED, WHETHER OR NOT THEY WERE DIRECTLY CITED IN THE ENDNOTES. THE BIBLIOGRAPHY OFFERS A BROADER OVERVIEW OF THE RESEARCH UNDERTAKEN.

GENERAL PRINCIPLES FOR CHICAGO STYLE ENDNOTES

CHICAGO STYLE ENDNOTES FOLLOW A STANDARDIZED FORMAT THAT EMPHASIZES CLARITY AND CONSISTENCY. TYPICALLY, THE FIRST FULL CITATION OF A SOURCE IN THE ENDNOTES WILL BE MORE DETAILED, INCLUDING ALL NECESSARY PUBLICATION INFORMATION. SUBSEQUENT CITATIONS OF THE SAME SOURCE CAN BE SHORTENED, OFTEN USING A SHORTENED TITLE AND PAGE NUMBER, OR A BRIEF AUTHOR-TITLE FORMAT. PUNCTUATION AND CAPITALIZATION ARE METICULOUSLY DEFINED TO ENSURE UNIFORMITY ACROSS ALL CITATIONS.

CRAFTING CHICAGO MANUAL OF STYLE IP ENDNOTES

WHEN DEALING WITH INTELLECTUAL PROPERTY (IP), THE NATURE OF THE SOURCE MATERIAL DICTATES SPECIFIC FORMATTING REQUIREMENTS FOR ENDNOTES. INTELLECTUAL PROPERTY ENCOMPASSES A WIDE RANGE OF CREATIONS OF THE MIND, FROM INVENTIONS AND ARTISTIC WORKS TO SYMBOLS AND NAMES USED IN COMMERCE. ACCURATELY CITING THESE CAN BE MORE COMPLEX THAN CITING TRADITIONAL BOOKS OR JOURNAL ARTICLES, REQUIRING ATTENTION TO UNIQUE IDENTIFIERS AND DESCRIPTIVE INFORMATION.

DEFINING INTELLECTUAL PROPERTY (IP) IN THE CONTEXT OF CITATIONS

FOR CITATION PURPOSES, INTELLECTUAL PROPERTY BROADLY REFERS TO CREATIONS THAT ARE LEGALLY PROTECTED. THIS INCLUDES PATENTS, WHICH GRANT EXCLUSIVE RIGHTS FOR AN INVENTION; TRADEMARKS, WHICH PROTECT BRAND NAMES AND LOGOS; COPYRIGHTS, WHICH SAFEGUARD ORIGINAL WORKS OF AUTHORSHIP; AND TRADE SECRETS. EACH OF THESE FORMS OF IP HAS DISTINCT CHARACTERISTICS THAT MUST BE REFLECTED IN THE ENDNOTE TO PROVIDE THE READER WITH SUFFICIENT INFORMATION FOR RETRIEVAL AND VERIFICATION.

CITING PATENTS AND PATENT APPLICATIONS

CITING PATENTS AND PATENT APPLICATIONS REQUIRES SPECIFIC DETAILS TO ENSURE ACCURACY. THIS TYPICALLY INCLUDES THE INVENTOR'S NAME, THE PATENT NUMBER (OR APPLICATION NUMBER), THE TITLE OF THE PATENT, THE DATE OF ISSUE (OR FILING DATE FOR APPLICATIONS), AND THE ISSUING AUTHORITY (E.G., THE U.S. PATENT AND TRADEMARK OFFICE). THE DISTINCTION BETWEEN A GRANTED PATENT AND A PENDING APPLICATION IS ALSO IMPORTANT.

CITING TRADEMARKS AND COPYRIGHTED MATERIAL

CITING TRADEMARKS INVOLVES REFERENCING THE MARK ITSELF, THE CLASS OF GOODS OR SERVICES IT COVERS, AND THE REGISTRATION DETAILS, IF APPLICABLE, INCLUDING THE REGISTRATION NUMBER AND THE DATE OF REGISTRATION. FOR COPYRIGHTED MATERIAL, SUCH AS BOOKS, ARTICLES, MUSIC, OR VISUAL ART, THE CITATION WILL INCLUDE AUTHOR, TITLE, PUBLICATION INFORMATION, AND SPECIFIC PAGE OR SECTION NUMBERS. FOR DIGITAL CONTENT, SUCH AS IMAGES OR VIDEOS, A

URL AND ACCESS DATE ARE OFTEN NECESSARY.

CITING SOFTWARE AND DIGITAL CONTENT

SOFTWARE AND OTHER FORMS OF DIGITAL CONTENT, WHICH OFTEN HAVE IP IMPLICATIONS, REQUIRE CAREFUL CITATION. FOR SOFTWARE, THIS MIGHT INCLUDE THE SOFTWARE TITLE, VERSION NUMBER, DEVELOPER OR PUBLISHER, AND THE YEAR OF RELEASE. FOR ONLINE CONTENT WITH IP PROTECTIONS, SUCH AS ARTICLES, REPORTS, OR MULTIMEDIA, THE CITATION SHOULD INCLUDE AUTHOR, TITLE, WEBSITE NAME, PUBLICATION OR LAST UPDATED DATE, AND THE URL, ALONG WITH AN ACCESS DATE.

SPECIAL CONSIDERATIONS FOR ONLINE RESOURCES WITH IP ASPECTS

ONLINE RESOURCES THAT INVOLVE INTELLECTUAL PROPERTY, SUCH AS DIGITAL ARCHIVES OF COPYRIGHTED MATERIAL OR PATENT DATABASES, NECESSITATE SPECIFIC ATTENTION TO ACCESS DATES AND URLS. BECAUSE ONLINE CONTENT CAN BE DYNAMIC AND CHANGE FREQUENTLY, PROVIDING THE DATE ON WHICH THE MATERIAL WAS ACCESSED IS CRUCIAL FOR REPRODUCIBILITY. IF A STABLE, PERSISTENT IDENTIFIER LIKE A DOI IS AVAILABLE, IT SHOULD BE PRIORITIZED OVER A STANDARD URL.

PRACTICAL APPLICATION: FORMATTING CHICAGO MANUAL OF STYLE IP ENDNOTES

THE PRACTICAL IMPLEMENTATION OF CHICAGO MANUAL OF STYLE IP ENDNOTES INVOLVES A SYSTEMATIC APPROACH TO GATHERING INFORMATION AND PRESENTING IT ACCORDING TO ESTABLISHED RULES. ADHERENCE TO THESE RULES ENSURES THAT YOUR CITATIONS ARE NOT ONLY CORRECT BUT ALSO ENHANCE THE CREDIBILITY AND READABILITY OF YOUR WORK.

STRUCTURE OF AN ENDNOTE FOR IP

A TYPICAL CHICAGO STYLE ENDNOTE BEGINS WITH A SUPERScript ARABIC NUMERAL CORRESPONDING TO THE NOTE NUMBER IN THE TEXT. THE ENDNOTE ITSELF THEN COMMENCES WITH THE AUTHOR'S FIRST NAME FOLLOWED BY THEIR LAST NAME (UNLIKE THE BIBLIOGRAPHY, WHERE THE LAST NAME COMES FIRST). THIS IS FOLLOWED BY THE TITLE OF THE WORK, PUBLICATION INFORMATION, AND SPECIFIC LOCATIONAL DETAILS SUCH AS PAGE NUMBERS OR ACCESS DATES. FOR IP-SPECIFIC CITATIONS, THIS STRUCTURE IS ADAPTED TO ACCOMMODATE THE UNIQUE DATA POINTS REQUIRED.

ESSENTIAL ELEMENTS OF AN IP ENDNOTE

REGARDLESS OF THE SPECIFIC TYPE OF IP, CERTAIN ELEMENTS ARE GENERALLY ESSENTIAL FOR A COMPREHENSIVE ENDNOTE. THESE INCLUDE:

- AUTHOR OR INVENTOR NAME(S)
- TITLE OF THE WORK (PATENT, TRADEMARK, SOFTWARE, ETC.)
- UNIQUE IDENTIFIER (PATENT NUMBER, APPLICATION NUMBER, REGISTRATION NUMBER)
- ISSUING AUTHORITY OR PUBLISHER

- DATES (ISSUE DATE, FILING DATE, REGISTRATION DATE, PUBLICATION DATE, ACCESS DATE)
- LOCATION INFORMATION (PAGE NUMBER, URL, DOI)

EXAMPLES OF CHICAGO MANUAL OF STYLE IP ENDNOTES

TO ILLUSTRATE THE APPLICATION OF THESE PRINCIPLES, HERE ARE SOME EXEMPLARY ENDNOTES FOR VARIOUS TYPES OF INTELLECTUAL PROPERTY:

CITING A U.S. PATENT

1. JOHN SMITH, U.S. PATENT 8,000,000, "IMPROVED WIDGET MANUFACTURING PROCESS," ISSUED OCTOBER 1, 2020, U.S. PATENT AND TRADEMARK OFFICE.

CITING A TRADEMARK REGISTRATION

2. "ACME CORP.," TRADEMARK REGISTRATION NO. 1,234,567, REGISTERED APRIL 15, 2018, FOR ADVERTISING AND BUSINESS MANAGEMENT SERVICES, WORLD INTELLECTUAL PROPERTY ORGANIZATION.

CITING A COPYRIGHTED DIGITAL IMAGE

3. "SUNSET OVER THE OCEAN," BY JANE DOE, PHOTOGRAPH, SEPTEMBER 5, 2022, FLICKR, [HTTPS://WWW.FLICKR.COM/PHOTOS/JANEDOE/1234567890](https://www.flickr.com/photos/janedoe/1234567890) (ACCESSED OCTOBER 26, 2023).

CITING SOFTWARE DOCUMENTATION

4. "USER MANUAL FOR NEBULA SOFTWARE, VERSION 3.0" (SAN FRANCISCO: GALACTIC SOFTWARE INC., 2021), 45.

TROUBLESHOOTING COMMON ISSUES WITH IP ENDNOTES

WRITERS OFTEN ENCOUNTER CHALLENGES WHEN CITING INTELLECTUAL PROPERTY, PARTICULARLY WITH THE AVAILABILITY OF CONSISTENT INFORMATION. ONE COMMON ISSUE IS DISTINGUISHING BETWEEN PRIMARY AND SECONDARY SOURCES WHEN DISCUSSING IP. FOR INSTANCE, A LEGAL COMMENTARY ON A PATENT IS A SECONDARY SOURCE, WHILE THE PATENT DOCUMENT ITSELF IS PRIMARY.

ENSURING CONSISTENCY AND ACCURACY

CONSISTENCY IN FORMATTING IS PARAMOUNT. WHICHEVER STYLE FOR SUBSEQUENT CITATIONS YOU CHOOSE (E.G., SHORTENED TITLE OR AUTHOR-TITLE), APPLY IT UNIFORMLY THROUGHOUT YOUR DOCUMENT. DOUBLE-CHECKING ALL NUMBERS, DATES, AND NAMES AGAINST THE ORIGINAL SOURCE IS ESSENTIAL FOR ACCURACY AND TO AVOID MISREPRESENTING THE INTELLECTUAL PROPERTY.

WHEN TO USE ENDNOTES VS. FOOTNOTES

THE CHOICE BETWEEN ENDNOTES AND FOOTNOTES IN CHICAGO STYLE OFTEN DEPENDS ON THE PUBLISHER'S PREFERENCE OR THE

NATURE OF THE WORK. FOR LONGER, MORE COMPLEX SCHOLARLY WORKS, ENDNOTES ARE FREQUENTLY PREFERRED AS THEY KEEP THE MAIN TEXT FREE OF LENGTHY CITATIONS. FOOTNOTES CAN BE MORE CONVENIENT FOR READERS WHO WISH TO CONSULT SOURCES WITHOUT LEAVING THE PAGE BUT CAN ALSO DISRUPT THE READING FLOW.

THE ROLE OF DIGITAL OBJECT IDENTIFIERS (DOIs) AND URLS

FOR ONLINE RESOURCES, ESPECIALLY THOSE THAT ARE PEER-REVIEWED OR HAVE ENDURING SCHOLARLY VALUE, A DIGITAL OBJECT IDENTIFIER (DOI) IS THE PREFERRED PERSISTENT IDENTIFIER. IF A DOI IS NOT AVAILABLE, A URL SHOULD BE PROVIDED. ALWAYS INCLUDE THE ACCESS DATE WHEN CITING ONLINE RESOURCES TO ACCOUNT FOR THEIR POTENTIAL VOLATILITY.

MASTERING THE NUANCES OF CHICAGO MANUAL OF STYLE 17TH EDITION ENDNOTES IS AN ACHIEVABLE GOAL WITH CAREFUL ATTENTION TO DETAIL AND A THOROUGH UNDERSTANDING OF THE PRINCIPLES OUTLINED. BY CONSISTENTLY APPLYING THESE GUIDELINES, WRITERS CAN ENSURE THEIR CITATIONS ARE ACCURATE, COMPREHENSIVE, AND PROFESSIONAL, CONTRIBUTING TO THE INTEGRITY AND CREDIBILITY OF THEIR RESEARCH.

FAQ

Q: WHAT IS THE PRIMARY DIFFERENCE BETWEEN A CHICAGO STYLE ENDNOTE AND A BIBLIOGRAPHY ENTRY FOR INTELLECTUAL PROPERTY?

A: THE PRIMARY DIFFERENCE LIES IN SPECIFICITY AND PURPOSE. AN ENDNOTE REFERS TO A SPECIFIC INSTANCE OF USE WITHIN THE TEXT, OFTEN INCLUDING PAGE NUMBERS OR ACCESS DATES FOR PRECISE LOCATION. A BIBLIOGRAPHY ENTRY PROVIDES A COMPREHENSIVE DESCRIPTION OF A SOURCE CONSULTED, WITHOUT NECESSARILY POINTING TO A SPECIFIC PASSAGE, AND IS USUALLY ALPHABETIZED BY AUTHOR'S LAST NAME. FOR IP, ENDNOTES WILL PINPOINT THE EXACT PATENT, TRADEMARK, OR COPYRIGHTED MATERIAL REFERENCED IN THE TEXT, WHILE THE BIBLIOGRAPHY WILL LIST ALL SUCH MATERIALS USED IN THE RESEARCH.

Q: HOW DO I CITE AN UNPUBLISHED PATENT APPLICATION IN CHICAGO STYLE ENDNOTES?

A: FOR AN UNPUBLISHED PATENT APPLICATION, YOU WOULD TYPICALLY INCLUDE THE INVENTOR'S NAME, THE TITLE OF THE INVENTION, THE APPLICATION NUMBER, THE FILING DATE, AND THE PATENT OFFICE WHERE IT WAS FILED. FOR EXAMPLE: 1. JANE DOE, "NOVELTY DEVICE," U.S. PATENT APPLICATION No. 12/345,678, FILED MAY 10, 2023, UNITED STATES PATENT AND TRADEMARK OFFICE.

Q: ARE THERE SPECIFIC RULES FOR CITING FOREIGN PATENTS IN CHICAGO STYLE?

A: YES, WHEN CITING FOREIGN PATENTS, YOU SHOULD INCLUDE THE PATENT NUMBER AS ASSIGNED BY THE FOREIGN PATENT OFFICE, THE COUNTRY OF ISSUANCE, THE INVENTOR(S), THE TITLE, AND THE ISSUE DATE. FOR EXAMPLE: 1. KENJI TANAKA, JAPANESE PATENT 1,234,567, "AUTOMATED GARDENING SYSTEM," ISSUED NOVEMBER 15, 2022, JAPAN PATENT OFFICE.

Q: WHAT INFORMATION IS CRUCIAL WHEN CITING A SOFTWARE PROGRAM AS INTELLECTUAL PROPERTY IN A CHICAGO STYLE ENDNOTE?

A: WHEN CITING SOFTWARE AS INTELLECTUAL PROPERTY IN A CHICAGO STYLE ENDNOTE, YOU SHOULD INCLUDE THE NAME OF THE SOFTWARE, ITS VERSION NUMBER (IF APPLICABLE), THE DEVELOPER OR PUBLISHER, AND THE YEAR OF RELEASE. IF YOU ARE REFERENCING SPECIFIC DOCUMENTATION, THAT WOULD BE CITED SEPARATELY. FOR EXAMPLE: 1. ADOBE PHOTOSHOP CC, VERSION 24.0 (SAN JOSE, CA: ADOBE SYSTEMS INCORPORATED, 2022).

Q: HOW DO I HANDLE CITING A TRADEMARK THAT IS STILL UNDER REVIEW OR HAS EXPIRED?

A: FOR A TRADEMARK THAT IS STILL UNDER REVIEW, YOU WOULD CITE IT AS A PENDING APPLICATION, INCLUDING THE APPLICATION NUMBER AND STATUS IF AVAILABLE. FOR AN EXPIRED TRADEMARK, YOU WOULD NOTE ITS EXPIRATION OR CANCELLATION DATE, ALONG WITH THE ORIGINAL REGISTRATION DETAILS. FOR INSTANCE: 1. "GLOBO-TECH," U.S. TRADEMARK APPLICATION NO. 98,765,432, PENDING REVIEW, FILED MARCH 1, 2023.

Q: IS THERE A DIFFERENCE IN CITATION FORMAT FOR COPYRIGHTED IMAGES FOUND ONLINE VERSUS THOSE IN PRINT?

A: YES, THERE IS A DIFFERENCE. FOR COPYRIGHTED IMAGES IN PRINT, YOU WOULD CITE THEM AS YOU WOULD ANY OTHER COPYRIGHTED MATERIAL, INCLUDING THE ARTIST/PHOTOGRAPHER, TITLE, AND PUBLICATION DETAILS. FOR ONLINE IMAGES, IN ADDITION TO THE CREATOR AND TITLE, YOU MUST INCLUDE THE NAME OF THE WEBSITE WHERE IT WAS FOUND, THE URL, AND THE DATE OF ACCESS, AS ONLINE CONTENT CAN BE EPHEMERAL.

Q: WHEN SHOULD I CONSIDER USING THE CHICAGO MANUAL OF STYLE'S NOTES AND BIBLIOGRAPHY SYSTEM FOR IP CITATIONS RATHER THAN AUTHOR-DATE?

A: THE NOTES AND BIBLIOGRAPHY SYSTEM IS GENERALLY PREFERRED FOR HUMANITIES DISCIPLINES, INCLUDING LITERATURE, HISTORY, AND THE ARTS. IF YOUR WORK INVOLVES EXTENSIVE DISCUSSION OF PATENTS, TRADEMARKS, OR COPYRIGHTED CREATIVE WORKS, AND YOU ANTICIPATE NEEDING TO PROVIDE DETAILED EXPLANATORY NOTES OR ADDRESS COMPLEX ATTRIBUTION ISSUES, THE NOTES AND BIBLIOGRAPHY SYSTEM IS OFTEN MORE SUITABLE AND FLEXIBLE FOR INTEGRATING IP CITATIONS.

Q: WHAT IS THE BEST PRACTICE FOR CITING LEGAL DOCUMENTS RELATED TO INTELLECTUAL PROPERTY, SUCH AS COURT CASES OR LEGAL BRIEFS?

A: CITING LEGAL DOCUMENTS INVOLVES SPECIFIC LEGAL CITATION FORMATS, OFTEN FOUND IN SPECIALIZED GUIDES LIKE THE BLUEBOOK. HOWEVER, IF ADAPTING TO CMOS FOR BROADER ACADEMIC WORK, YOU WOULD TYPICALLY INCLUDE THE CASE NAME, THE VOLUME AND PAGE NUMBER OF THE REPORTER WHERE THE DECISION CAN BE FOUND, AND THE COURT AND YEAR OF DECISION. FOR BRIEFS, YOU WOULD INCLUDE PARTIES, DOCUMENT TITLE, COURT, AND FILING DATE. ALWAYS AIM FOR CLARITY AND VERIFIABILITY.

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