

HOW TO CREATE A PLEADING TEMPLATE IN WORD

The instructions below demonstrate how to create a pleading template using the desktop version of Word 2016, with a variation for users of Microsoft Word for Microsoft 365. Note: These steps may not work for the web-based Microsoft Word.

Spacing

1. When preparing to create a pleading template, first confirm the spacing needed. Typically, double spacing is best. To change this, highlight all your text or press Ctrl+A to select all items.
2. Then click the spacing button under the Paragraph menu on the Home ribbon.
3. A new menu will appear. Here, you can change the spacing before, after, and between each line or paragraph. You want **0** before and **0** after. Then choose **Exactly** and **24pt**. “Exactly” will keep your text aligned with your line numbers in the body. When finished, click **OK**.

Line Numbers

1. To insert the line numbering, first put your document into Header/Footer mode. To do this, double-click in the area at the top of the page where you would see a header. A new tools ribbon will appear.
2. In the tools ribbon, choose **Insert Text Box** and click on the drop-down option, then choose **Draw Text Box**.
3. Draw your text box along the left-hand side of your document, all the way down to the bottom of the page.
4. Type the numbers 1, 2, 3, 4, until 26 or 28, whichever is your preference.
5. Once you have done that, you can manually adjust the text box by clicking and dragging the entire box down, so your line numbers match up with the text in your pleading.
6. Follow the same steps as in Step 1 above for spacing the number line text box.
7. During this process, you should double-check that the spacing in the document and the spacing in the number line text box match up. To ensure your lines match, go to **Insert, Shape**. Then click **Line** and draw a straight line from your last line to the last number. Adjust the text box to match the body text as necessary. Remember to delete your inserted line before moving forward.
8. Remove the visible border around the number line text box via **Right click > Format this shape**. Look for **Line options** and select **No Line**.

Footer

1. To create the footer, double-click on the area at the bottom of the page where the footer would be.
2. Once in the footer, go back up to the ribbon and select **Page Number**, then choose how you would like that number to appear. You can choose to add the title of the document in this space, too.
3. This is also where you can put the name of your law firm. While still in the footer, go back to the tools ribbon at the top and choose **Insert Text Box** and **Draw Text Box** in the drop-down.
4. You can draw your box anywhere in the footer—the lower right-hand side is the typical place for the law firm name. Draw your box and then add your law firm name and address inside the box. You will have to adjust the font size to fit all the firm information in the box. You may also have to adjust the spacing per step 1. Opting for single spacing is acceptable since this is in the footer and not in the body of the document.

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Caption

1. To create the caption of the pleading, insert a table by placing your cursor in the area where you want the caption to appear. Find the tools ribbon, and choose **Insert Tab**, then **Add a Table**. You will then choose the number of columns and rows that you want. Typically, it will be two columns and one row. Click **OK**.
2. If you already have template caption information typed, cut and paste; otherwise type your information in the table. Format the text in that table to your liking (left-justification, indenting, spacing, etc.).
3. You can either keep the border visible, change the border to be invisible, or keep an inside line--whatever your preference.

Microsoft 365 Version

Line Numbers

1. To insert the line numbering, go to the **Layout** menu. On the right-hand side of the **Page Setup** section, find **Line Numbers**. Click the drop-down arrow to see all the options.
2. For line numbers per page, click **Restart Each Page**.
3. For a left-hand line, go to **Design** menu. Click **Page Border**, and a new menu should pop up. Select the width and style, then click the left side of the small document image. This will apply the border to only the left side of the document.

Caption

1. Because the line numbers are attached to the document's lines, a table will be recognized as a break in the lines. To create a caption using the pre-set line numbers, you will need to insert two text boxes. To do this, go to the **Insert** menu. Click **Text Box**.
2. Draw one text box where you would like the left side of the caption to begin.
3. Format the text box so it is in front of the text and has no outline.
4. On the **Home** menu, you can add right-side and bottom borders.
5. Copy and paste or draw a new text box to be the right-hand side of the caption.

Formatting

1. Use the **Center** button in the paragraph menu to put your court information in the middle of the page above the caption.
2. Indent your body as preferred below the caption.
3. For ease of future use, highlight the text of the template that will need to be completed for future matters.

Template Format

1. To save the template, you should save the document in the Word Template format. This will allow you to open new documents keeping the template's formatting and text without changing the underlying template document. To do this, go to **File** and choose **Save As**.
2. You must choose your File Type FIRST to save as a Word Template (".dotx") and then choose the folder where you will save the template, along with the name of the template document. If this template is for office use, be sure it is stored in a central location and has a clear name indicating that it is a template.

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3. To open the template for editing, right click and click **Open**. To open for a new document, double-click the document. If this is for office use, provide clear instructions to staff for how to open the template for editing versus for creating new documents.
4. Then **Save** and **Close**.

IMPORTANT NOTICES

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