ATTORNEY'S GUIDE TO OPENING A CIVIL CASE

ADDING CASE PARTICIPANTS – 1

BEFORE YOU BEGIN ADDING PARTIES

✓ Have your Complaint or Notice of Removal with the State court's Complaint available. These will help you enter the party names correctly and in the proper order (ordered exactly as listed on the Complaint caption).

✓ If you are filing a Notice of Removal, you will use the original caption from the State court's Complaint, or the most current Amended Complaint. **REMEMBER**: the Plaintiff(s) remains the Plaintiff(s) and the Defendant(s) remains the Defendant(s).

DO NOT USE THE BROWSER BACK BUTTON AT ANY TIME during this process. You will lose your entire work product. If you need to make changes or corrections to your party, see Icons in the Participant Tree for instructions.

PARTICIPANT TREE

This screen allows you to enter all of the parties in your case. We will refer to the left section as the Participant Tree and the right as the Party Information Screen (highlighted in **RED** below).

You will notice that this screen and all subsequent screens will only display a partial case number.

A full case number will be assigned at the completion of the case opening process.

SEARCHING FOR A PARTY

On the **SEARCH FOR A PARTY** screen, you will search the ECF database for a name matching your party's name.

In the **LAST/BUSINESS NAME** field, enter the first party's surname or the company name.

Click **SEARCH**.

NOTE	You should never add a party description or text (e.g., an alias) here. This should be added in the **PARTY TEXT** field later.

SEARCH RESULTS

Search for a party

Last / Business Name: Widget Company
First Name:

Prisoner ID:

Search

If there are names in the ECF database matching your party's name, they will be displayed in the **SEARCH RESULTS** box.

Search Results
- Widget Company
- Widget Company Plus

Select Party | **Create New Party**

If a name matching your party's name appears in the Search Results, do NOT create a new party.

If you find an exact match in the **SEARCH RESULTS** box, select the name and click **SELECT PARTY.**

Search Results

Select Party | **Create New Party**

Search returned no results. Please try again or create a new party.

If you <u>do not</u> find an exact match, or your search returns no results, click **CREATE NEW PARTY.**

ENTERING PARTY INFORMATION

After clicking **SELECT/CREATE NEW PARTY**, you will enter your party's information on the **PARTY INFORMATION** screen.

REMEMBER	• The parties must be entered in the order they are captioned on the Complaint (Federal or State court). • **NEVER USE ALL CAPS** when entering party names.

PARTY INFORMATION SCREEN

ONLY ENTER INFORMATION IN THE OUTLINED FIELDS.

- Fields outlined in **BLUE** are applicable to all parties.

- Fields outlined in **RED** should only be completed if the party is Pro Se.

Use the table on the next slide as a reference.

PARTY INFORMATION FIELDS

Field	Description
1 Role	This field lists the available party roles. The system automatically defaults to **Plaintiff** for all parties; so, remember to change the role when entering Defendant parties. Role: Plaintiff (pla:pty) Defendant (dft:pty) Defendant/Appellant (dft/a:pty) Defendant/Appellee (dfte:pty) Defendant/Appellee (dft/e:pty) Garnishee (gar:pty) In Re (in:pty)
2 Pro Se	Select the party's Pro Se status. Keep in mind, you only select "**Pro Se but not allowed to file electronically**" in removal cases wherein the party appeared on his/her own behalf in State court. Pro se: No No Pro Se but not allowed to file electronically Pro Se allowed to file electronically **NEVER** select "**Pro Se allowed to file electronically.**"
3 Address and Phone	Only enter this information if the party is unrepresented/Pro Se. **NEVER** enter an e-mail address.
4 Party text	**You must enter Party Text exactly as it appears on the caption.** This information would be found directly under each party's name. For example, a company might read "a Washington corporation," and a party may be identified as "an individual" or "husband and wife and the marital community comprised thereof." Party text: a Washington corporation **Do not use the Last Name field** for this information. And, if there is no such information in the caption, **leave this field blank**.

ADDING A PARTY

When you are confident that your party information is correct and complete, click **ADD PARTY.**

You will now see your party's name in the **PARTICIPANT TREE.**

Click **ADD NEW PARTY** to start adding the next party.

Repeat this process until <u>all</u> parties have been added and are listed in the Participant Tree.

ICONS IN THE PARTICIPANT TREE

You may use the icons located next to the party names in the participant tree to make modifications to your entries.

Icon	Description
❌	Remove this party from the case.
✏️	Edit the party, alias, or attorney. Note: Only displays next to actual names of participants. If no participant has been added, this icon is suppressed.
📋	Copy attorney(s) from other parties in the case to this party.
👥	Add new alias or attorney.

If you do not see the icons, use the **EXPAND ALL** link to expand the party information tree.

Add New Party   Create Case

Collapse All   ➡   Expand All

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