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.

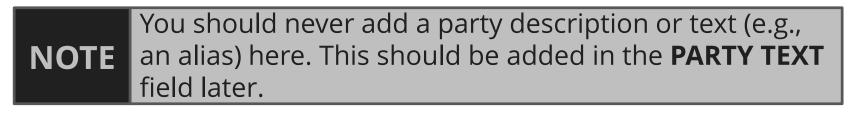
SEARCHING FOR A PARTY

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

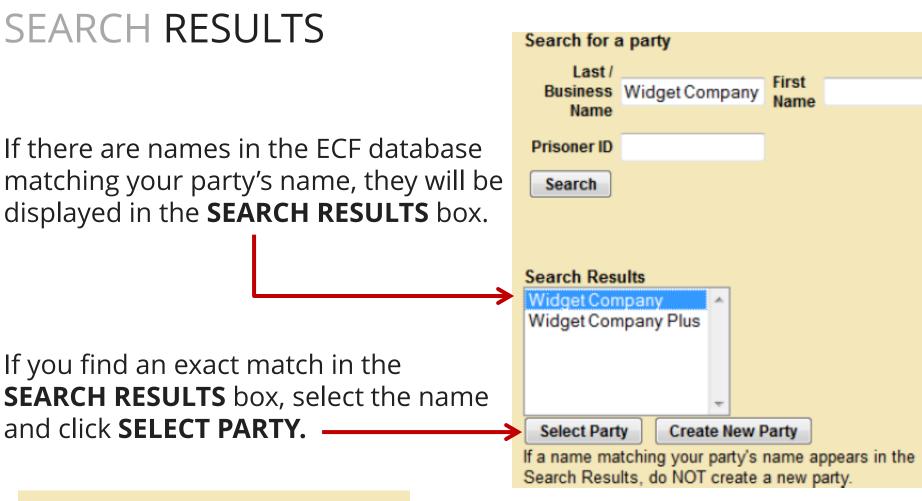
In the **LAST/BUSINESS NAME** field, enter the first party's surname or the company name.



Click **SEARCH**.









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.

| Party Information Widget Co. | | | |
|------------------------------|---------------------|-----------|---------------------------------|
| Title | e | | |
| 1 Role | Plaintiff (pla:pty) | • | |
| 2 Pro se | No | - | |
| Prisoner l | d | Unit | |
| Office | е | | |
| Address | 1 | | |
| Address | 2 | ☐ Show to | his address on the docket sheet |
| Address | 3 | City | |
| State | e Zip | Country | |
| Priso | n | | - |
| Phone | e | Fax | |
| E-ma | il | | |
| 4 Party tex | t | | |
| Start date | e 6/22/2015 | End date | |
| Corporation | n no ▼ | Notice | yes ▼ |
| Add Party Start a New | _ | | |

Use the table on the next slide as a reference.



PARTY INFORMATION FIELDS

| | Field | Description | | | |
|---|----------------------|--|--|--|--|
| | | This field lists the available party roles. The system automatically | | | |
| 0 | Role | defaults to Plaintiff for all parties; so, remember to change the role when entering Defendant parties. Plaintiff (pla:pty) Defendant (dft:pty) Defendant/Appellant (dft/a:pty) Defendant/Appellee (dfte:pty) Defendant/Appellee (dft/e:pty) Defendant/Appellee (dft/e: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 No Soner Id Pro Se but not allowed to file electronically Pro Se allowed to file electronically." | | | |
| 8 | 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 comprised thereof." 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.

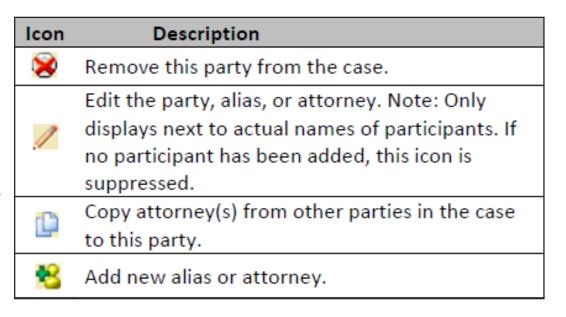
Repeat this process until <u>all</u> parties have been added and are listed in the Participant Tree.





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.



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

