



# Attorney's Guide to Opening a Civil Case: Docketing the Lead Event

## 7.1 Selecting Initiating Document

Once the case is created, the Lead Event needs to be filed in the case.

1. Select **Docket Lead Event** to proceed to the **Complaints and Other Initiating Documents** screen.

Case Number 19-1 has been opened.

**Docket Lead Event?**

2. CM/ECF populates your case number automatically. Select **Next** to continue.
3. On the next screen, the case number and case short title are shown, then select **Next**.

### Complaints and Other Initiating Documents

2:19-cv-00001 Smith

Next Clear

4. Select the initiating document you wish to file (see [section 3.2](#) for selection options).

### Complaints and Other Initiating Documents

2:19-cv-00001 Smith

Start typing to find an event.

**Available Events** (click to select an event)

Complaint  
Counterclaim  
Crossclaim  
Intervenor Complaint  
Motion for Judgment Debtor Exam  
Motion for Leave to Proceed In Forma Pauperis  
Motion to Vacate/Set Aside/Correct Sentence (2255)  
Notice of Receivership  
Notice of Removal  
Petition (Other)  
Petition for Writ of Habeas Corpus  
Petition to Enforce IRS Summons  
Registration of Foreign Judgment  
Request for Determination  
Third Party Complaint

Next Clear

5. Once your selection is displayed in the **Selected Event** field, select **Next**.

## 7.2 Selecting the Parties

1. Select the party filing the document (the party represented by you) then select **Next**.

Pick Filer

Collapse All Expand All

Karen R Smith pla  
Widget Company dtf

Select the filer.

Select the Party:

Smith, Karen R [pla]  
Widget Company [dtf]

Next Clear New Filer



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2. Leave all fields checked, then select **Next**.

The following attorney/party associations do not exist for the above case(s).

Please check the box on the left of the screen for associations which should be created.

If the association should *not* be created, be sure the box is *unchecked*.

Karen R Smith (pty:pla) represented by Attorney Wawdone (aty)  Notice

Next

Clear

- a. CM/ECF will link your name to the name of the party you are representing (the party you selected on the previous page) and activate electronic notice for this case.

3. Select the party you are filing against (i.e. the opposing party) then select **Next**.

**Note:** If there are multiple parties, you may use the **Select a Group** radio buttons to select an entire group (e.g., **All Plaintiffs**), or select each party individually by holding down Ctrl (Windows) or Command/⌘ (Mac) then selecting each party in the **Select the Party** box.

Please select the party that this filing is **against**.

Select the Party:

OR

Select a Group:

Smith, Karen R [pla]  
Widget Company [dft]

- No Group  
 All Defendants  
 All Plaintiffs  
 All Parties

Next

Clear

New Party

4. CM/ECF asks if you have added all parties named in this filing.
  - a. If you did not add *all* parties during the initial case opening process, select **No** and select **Next**.
    - i. This returns you to the **Search for a party** screen. Add any remaining parties using the instructions covered in [Adding Parties](#).
  - b. If you are confident that you have added all parties named in this filing, select **Yes** and then select **Next**.

### 7.3 Uploading Documents

When docketing your lead event, you are asked to upload the main document and all attachments.

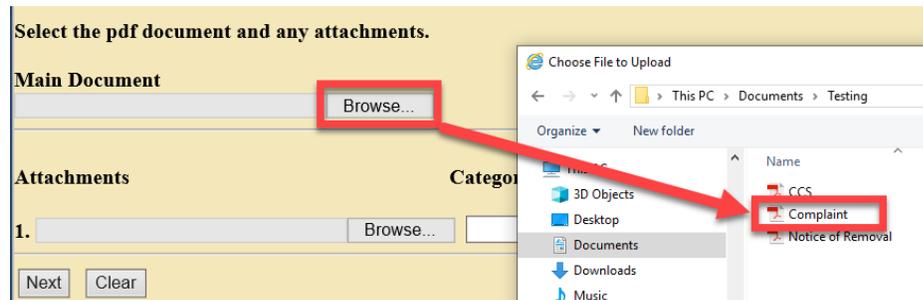
#### REMEMBER

- All documents must conform to the requirements laid out in the [CM/ECF Filing Procedures](#) and the [CM/ECF Requirements and Technical Tips](#) page.



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1. To upload your main document select **Browse** next to **Main Document**.
  - a. Upload the Complaint/Petition or, if applicable, the Motion for Leave to Proceed In Forma Pauperis as the main document.
2. CM/ECF displays the file upload window, which allows you to locate the file on your computer.



3. Navigate to the appropriate directory on your computer and select the file you wish to upload.
4. The location and name of your document appears in the **Main Document** field.



5. To upload all additional attachments, select **Browse** next to **Attachments** and follow steps [7.3.2-3](#).
  - b. Possible attachments include:
    - Civil Cover Sheet (required for all cases except Petition for Writ of Habeas Corpus)
    - Complaint (if your main document is a Motion for Leave to Proceed In Forma Pauperis)
    - Summons (optional, see [Filing a Summons](#) for more detailed information)
    - Report on Filing or Determination of an Action Regarding a Patent or Trademark (Patent or Trademark cases)
    - Report on Filing or Determination of an Action or Appeal Regarding a Copyright (Copyright cases)



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- Label each attachment by selecting a **Category** and/or by entering text in the **Description box**. Either a **Category** or a **Description** is required.

Attachments	Category	Description
1. <input type="text"/> Browse... <input type="button" value="Next"/> <input type="button" value="Clear"/>	Amended Complaint Application for Court-Appointed Counsel Certificate of Service Citation Civil Cover Sheet Complaint Exhibit Jury Demand Proposed Acceptance of Plea Proposed Order Proposed 1983 Prisoner Civil Rights Complaint Proposed Petition for Writ Of Habeas Corpus Report on Copyrights (AO Form 121) Report on Patents and Trademarks (AO Form 120) Supplement Summons	<input type="text"/>

- When filing Exhibits, it is strongly recommended to choose **Exhibit** from the **Category** menu *and* to enter a **Description** of each exhibit (e.g. **Category: Exhibit; Description: A – Medical Records**). You do not need to repeat the word “exhibit” in the **Description** text.
- Once you upload all documents, select **Next**.

### 7.4 Filing a Summons

If you are requesting a summons to be issued by the Court, use the fillable form found on the [Court's website](#).

#### REMEMBER

- Each summons must be filed as a *separate attachment*.
- Summons(es) are issued electronically by the Court.
- You will receive a Notice of Electronic Filing (NEF) of the issued summons when the Clerk's Office enters it on the docket.
- Use the NEF hyperlink to retrieve the issued summons to effect service of process.

To file a summons with the court:

- Locate and attach each summons in the same manner as all other attachments.
- Select Summons from the Category dropdown menu.
- If desired, you may also add a description in the text box.