



Attorney's Guide to Opening a Civil Case: Adding Parties

This screen allows you to enter all of the parties in your case. All parties listed on the caption of your initiating document must be entered at this time, even parties whose names are unknown.

The screen is divided into two sections. We refer to the left section as the **Participant Tree** and the right as the **Party Information** screen.

Open a Civil Case

Participant Tree **Party Information Screen**

Add New Party Create Case

Collapse All Expand All

2:19-cv-?????

Search for a party

Last / Business Name First Name Middle Name

Search



Do not use the browser's Back button while adding parties to your case. You will lose all parties and party information. If you need to make changes or corrections to your party, see [Icons in the Participant Tree](#) for instructions.

6.1 Before You Get Started

- Have your initiating document available.
 - This will help you enter the party names correctly and in the proper order (ordered exactly as listed on the complaint caption).
- Review the [Standards for Entering Party Names in CM/ECF](#).

Note: Parties or companies with unknown names must also be added to the case. These are often listed as “John Doe,” “Jane Doe,” or “Unknown Companies XYZ.” For more information on how to add unknown parties, refer to the “Unknown/Doe Parties” section of the [Standards for Entering Party Names in CM/ECF](#).

6.2 Searching for a Party

1. Enter the first party's surname or the company name in the **Last/Business Name** and first name in the **First Name** field and select **Search**.

Search for a party

Last / Business Name Smith First Name Karen Middle Name

Prisoner ID

Search

Note: You should never add a party description, text, or alias here. This should be added in the **Party Text** or **Party Alias**. See [Table C \(4\)](#).



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2. If there are names in ECF matching your party's name, they will be displayed in the **Search Results** box.

Search for a party

Last / Business Name First Name

Prisoner ID

Search Results

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

3. If you find an exact match in the **Search Results** box, select the name and select **Select Party**.

4. If you *do not* find an exact match, or your search returns no results, select **Create New Party**. See [6.3 Entering Party Information](#) for next steps.

Search Results

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

REMEMBER

- Parties must be entered in the order they are listed on the initiating document.

6.3 Entering Party Information

After selecting **Select Party/Create New Party**, you will enter your party's information on the **Party Information** screen. Parties must be entered in compliance with the [Standards for Entering Party Names in CM/ECF](#).



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Party Information
Karen R Smith

- Fields with a ✓ are applicable to all parties
- Fields outlined in RED should only be completed if the party is Pro Se

1 Title

✓ Role

2 ✓ Pro se

Prisoner Id Unit

Office

Address 1

3 Address 2 Show this address on the docket sheet

Address 3 City

State Zip Country

Prison

Phone Fax

4 E-mail

5 Party text

Start date End date

Corporation Notice

[Start a New Search](#)

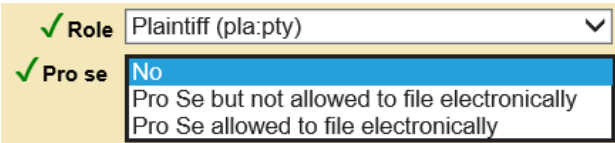
TABLE C

Field	Description
1 Role	<p>This field lists the available party roles. The system automatically defaults to Plaintiff for all parties; remember to change the role when entering parties with different roles (e.g., Defendant or Petitioner).</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>✓ Role</p> <ul style="list-style-type: none"> Intervenor Plaintiff (intvp.pty) Material Witness (mw.pty) Mediator (med.pty) Movant (mov.pty) Nominal Defendant (nd.pty) Objector (obj.pty) Petitioner (pet.pty) <li style="background-color: #00a0e3; color: white;">Plaintiff (pla.pty) Plaintiff/Appellant (pla/a.pty) </div>



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TABLE C

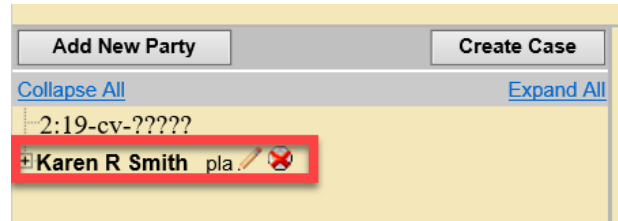
Field	Description
2 Pro Se	Select whether the party is representing themselves (Pro Se). The majority of time, this should be set to No . <i>Never select Pro Se allowed to file electronically.</i> 
3 Address and Phone	Only enter this information if the party is pro se. (See Standards for Entering Party Names in CM/ECF)
4 E-mail	Always leave this field blank.
<i>You must enter Party Text exactly as it appears on the caption.</i> Party Text includes:	
5 Party text	<ul style="list-style-type: none">• Descriptive information about the parties. For example, a company might be described as “a Washington corporation.”• Ranks or Titles such as military ranks (exclude generic Mr. or Mrs./Ms. Titles). <p>Do not use the Last Name or Title fields for this information. And, if there is no such information in the caption, <i>leave this field blank</i>. (see Standards for Entering Party Names in CM/ECF)</p> <p>Do not enter aliases in the Party text field. (see Add Alias section for more information)</p>

1. Review this screen carefully before proceeding. Once you are confident that your party information is correct and complete, select **Add Party**.
2. After selecting **Add Party**, you will see your party's name in the **Participant Tree**.
 - a. You may make changes/additions here. See [Icons in the Participant Tree](#).



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3. Select **Add New Party** to start adding the next party.
4. Repeat this process until *all* parties have been added and are listed in the **Participant Tree**.

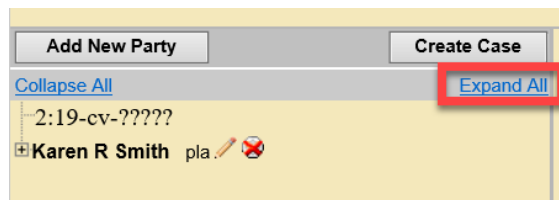


6.4 Icons in the Participant Tree

You may use the icons located next to the party names in the **Participant Tree** to make modifications to your entries. Refer to [Table D](#) for a description of each icon.

TABLE D

Icon	Description
	Remove this party from the case.
	Edit the party, alias, or attorney.
	Copy attorney(s) from other parties in the case to this party.
	Add new alias, corporate parent, or attorney.



If you do not see these icons, use the **Expand All** link to expand the **Participant Tree**.

6.5 Adding an Attorney

You must enter *all* attorneys for the filing party who are appearing in this case, with the following exceptions:

- Yourself: The attorney whose CM/ECF account is used to file the case.
 - o CM/ECF allows you to create this association when you file the initiating document.
- Pro Hac Vice attorneys
 - o Pro Hac Vice attorneys can only be admitted by order of the court (see [Pro Hac Vice Admissions](#) webpage).



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- If they return no results after searching by bar number *and* name under **Search for an attorney**

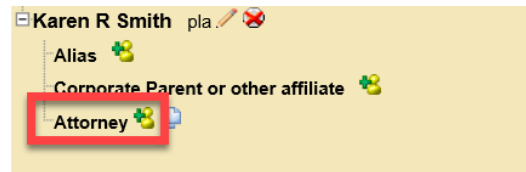
Note: Do not add attorneys for the non-filing party. Non-filing party attorneys must appear in the case prior to being added to the docket.

If the last three exceptions apply:

1. Do not add the attorney.
2. Set the **Pro Se** status for any represented party to **No**.
 - a. Pro se status **Pro Se but not allowed to file electronically** should only be used for parties who you know intend to appear on behalf of themselves.

To add an attorney to a party:

1. Select the  icon next to **Attorney** under the party's name in the **Participant Tree**.



2. The **Search for an attorney** screen is displayed. Enter the attorney's bar number or name and select **Search**.
 - a. Only attorneys admitted in this district return in the search results.

Search for an attorney for Karen R Smith

Bar Id

Last Name First Name Middle Name

Note: If the name does not return any results, be sure to search by both bar number and last name to ensure they are not admitted to our court.

3. If no results are returned, do not add the attorney.
4. If results are returned, select **Select Attorney** to display the **Attorney Information** screen.
5. Compare Bar ID and address to ensure you are selecting the correct attorney's name.
 - a. If the Bar ID and address do not match, go to **Start a New Search** and search again for the attorney's name and select additional matching names.



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Do not alter any information on this screen.

Attorney Information
Janet L. Smith (Bar Id : 13647, Bar Status : Active)

DO NOT edit the attorney's contact information.
If this information is incorrect, the attorney may file a Notice of Change of Address and the court will update the attorney's account.

Title

Office Unit

Address 1 Address 2

Address 3 City

State Zip

Country Phone

Fax E-mail

Pro Hac Vice Lead attorney

Designation


Notice

Start date End date

[Start a New Search](#)


6. Select **Add Attorney** to add them to the case.
 - a. The attorney's name is added to the **Participant Tree** under the party you selected.



7. Repeat this process until all attorneys are added.
8. If the same attorney is representing multiple parties, use the copy attorney tool  to add an attorney to multiple parties.
 - a. To use the copy attorney tool:
 - i. Go to the party in the **Participant Tree** that you need to add the attorney.

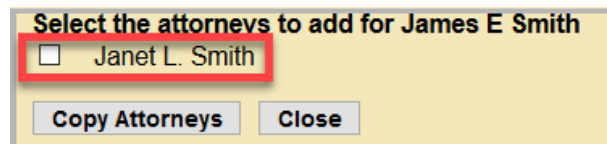


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- ii. Select the copy attorney tool  next to **Attorney**.




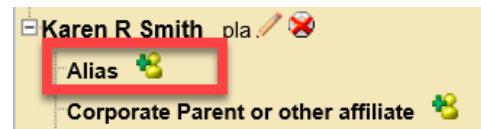
- iii. Select the attorney from the list of attorneys already added to the case then select **Copy Attorneys**.



6.6 Adding an Alias

If the caption on your initiating document indicates an alias, i.e. another name that a person or business is also known by:

1. Select the  icon next to **Alias** for the appropriate party in the **Participant Tree**.
2. On the **Search for an alias** screen, enter the alias in **Last/Business Name** and **First Name** (if applicable – see [Standards for Entering Party Names in CM/ECF](#)) then select **Search**.
 - a. If a match is found, highlight the name and select **Select Alias**.
 - b. If a match is not found, select **Create New Alias**.
3. In both cases, the **Alias Information** screen is displayed. If not already entered, enter the alias and select a **Type** from the dropdown menu. Refer to [Table E](#) for a description of alias types.



Alias Information	
Last/Business name	Barbano
Middle name	
Type	agent aka assign dba div est
<input type="button" value="Add Alias"/>	
Start a New Search	

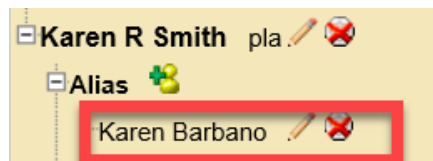


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TABLE E

Type	Description	Type	Description
agent	Agent of	mnr	Minor
aka	Also known as	nee	Born (usually refers to maiden name)
assign	As assignee of	nka	Now known as
dba	Doing business as	obo	On behalf of
div	A division of	other	Other
est	Estate of	pro	Personal representative of
exrel	Ex Rel	rpi	Real party interest
fdba	Formally doing business as	suc	Successor in interest
fka	Formally known as	ta	Trading as

- Once you finish entering your alias information, select **Add Alias**.
- The alias is added to the **Participant Tree** under the party you selected.
- Repeat this process until all aliases are entered.



6.7 Adding a Corporate Parent/Other Affiliate



Do not add a corporate parent at this stage . You are required to add corporate parents/other affiliates when filing a Corporate Disclosure Statement which should be filed after initial case opening. See [Follow-up Filings](#).

6.8 Creating your Civil Case



Before creating your case, be sure that you finished adding all associated party information to the case as you will not be able to go back and edit the parties.

- When you are certain your case information is accurate and complete, select **Create Case** at the top of the **Participant Tree**.





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2. CM/ECF asks you to confirm that your new case should be created.
 - a. If you have not finished adding all parties, select **No** to resume entering parties; otherwise, select **Yes** to create the case.
3. The next screen lists your case number and instructs you to select **Docket Lead Event** to file your initiating document and attachments and to pay the filing fee (if required).
 - a. Before proceeding, take note of your case number, should you need assistance with this case.

Case Number 19-1 has been opened.

[Docket Lead Event?](#)

Note: Although the case is created, it will *not* be opened until the initiating document is filed and the filing fee is paid (if required).