Filing Procedures – Adding/Creating a New Party

Overview

Sometimes, during the course of filing a document, filing users will need to add a new party to a case, such as when filing amended complaints, third party complaints, and motions by interested parties.

Note: Verify that you are filing in the correct case before adding a new party to the case.

Adding/ Creating a New Party: Process Overview

Below is an overview of the process for adding/creating a new party:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click on the New Filer button on the right side of the pick filer screen during filing.</td></tr>
<tr><td>2</td><td>Search for the party name in the system.
<table>
<tr><th>If the search results…</th><th>Then…</th></tr>
<tr><td>Show a list of party names in the system, and your party name appears on the list</td><td>Select the party name by clicking on it and then click on the Select Party button.</td></tr>
<tr><td>Show a list of party names in the system, and your party name does not appear on the list</td><td>Click on the Create New Party button.</td></tr>
<tr><td>Indicate No person found</td><td>Click on the Create New Party button.</td></tr>
</table></td></tr>
<tr><td>3</td><td>Fill in the party’s complete name and the role of the party (i.e., movant) on the Party Information screen.
Note: Do not enter a party’s address.</td></tr>
<tr><td>4</td><td>Click on the Add Party button at the bottom of the screen.</td></tr>
<tr><td>5</td><td>Click the Next button or New Filer button if adding more parties.</td></tr>
<tr><td>6</td><td>Create the attorney/party association.</td></tr>
<tr><td>7</td><td>Continue with the filing.</td></tr>
</table>

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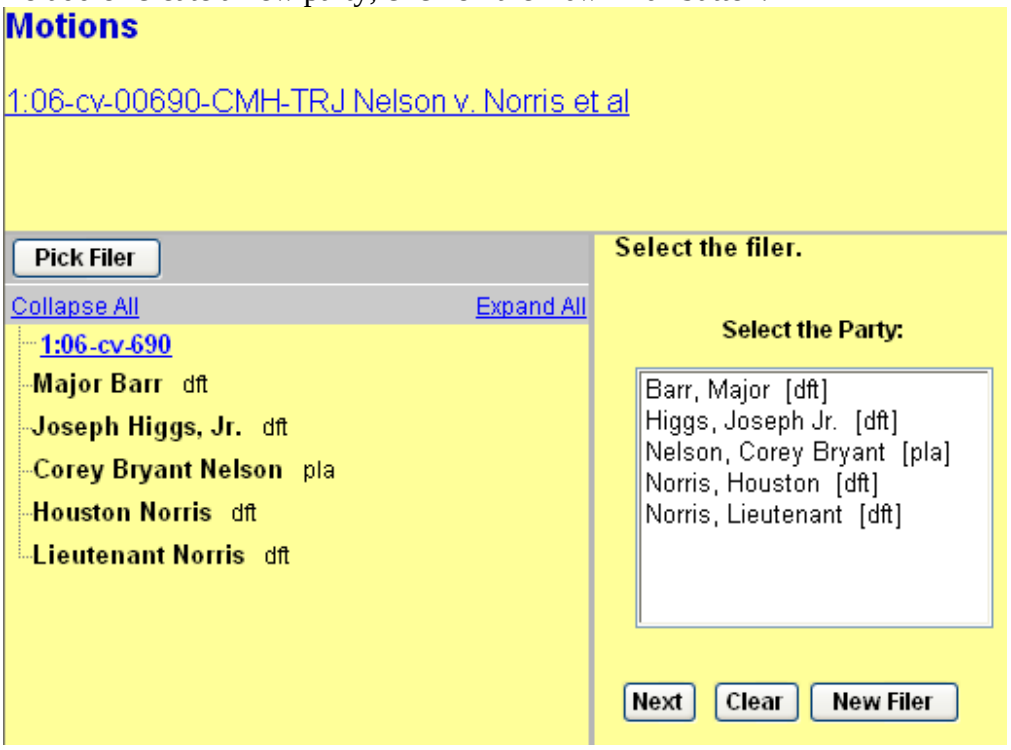
Adding/ Creating a New Party: ***Add/Create New Party*** **Link**

To add or create a new party, click on the *New Filer* button.



Note: The following pages will take you through two different possibilities and the accompanying examples.

- Example 1 (*Adding a New Party*) goes through what happens when a party's name is already in the system but not associated with the case. In this example, an individual's name has been used, but the same process would apply to a business name.
- Example 2 (*Creating a New Party*) goes through what happens when a party's name is not already in the system. In this example, a business name has been used, but the same process would apply to an individual's name.

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Adding a New Party: Searching for an Individual's Name in the System

Example 1 - Search for the party name in the system by taking the following steps:

- Type the last name of the individual. Capitalize the first letter of the individual's last name (e.g., *Smith*).
- Click on the *Search* button.

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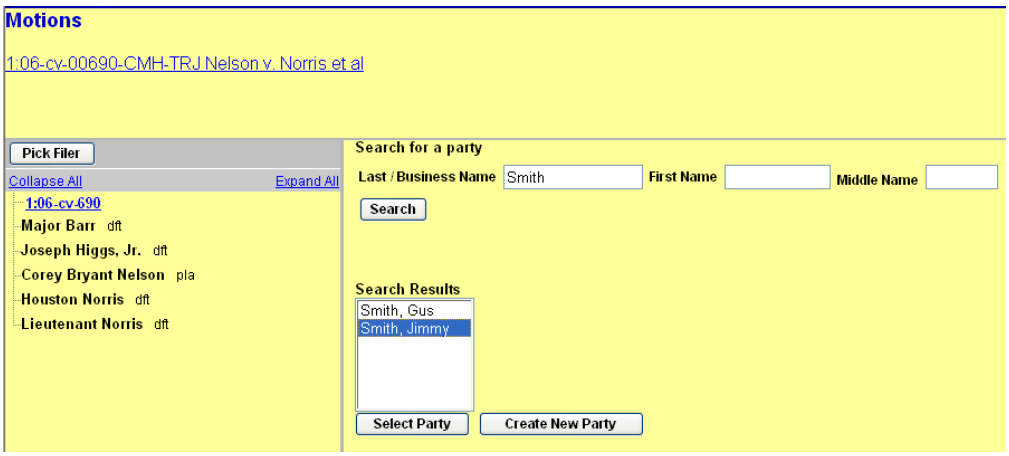
Adding a New Party: Selecting from Search Results

Example 1 (continued) - Select the correct party from the search results, when applicable, as follows:

- Scroll through the party search results to find your party name.
- Click on the party name to select the correct party.
- Click on the *Select Party* button.

The screen shot below shows that *Jimmy Smith* was selected from the search results. The next step would be to click on the *Select Party* button.



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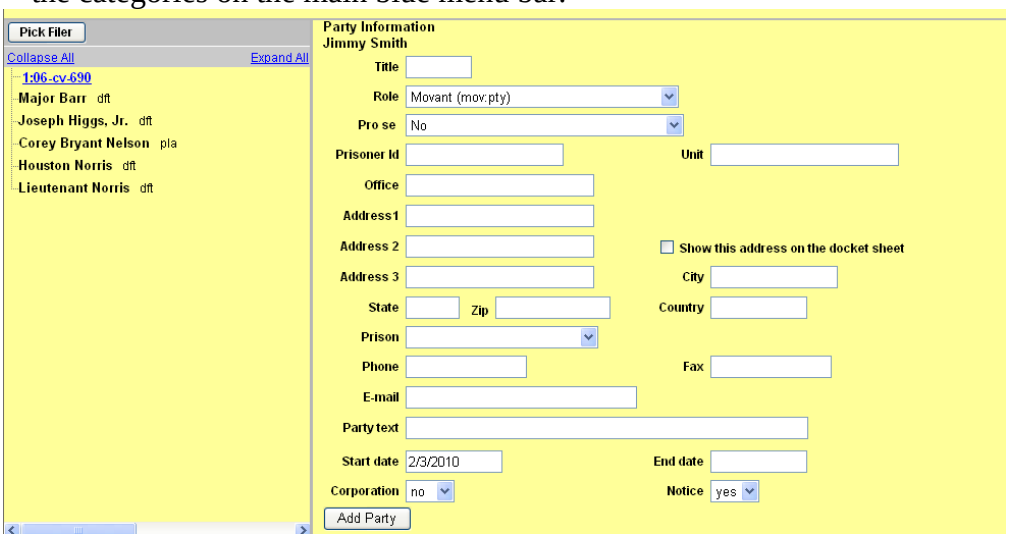
Adding a New Party: Party Information Screen

Example 1 (continued) - When you click on the *Select Party* button, the *Party Information* screen appears. Note that the party's name has been supplied at the top of the screen and cannot be modified.

- Use the *Party Information* screen to make changes as necessary:
  - *Role* -- change the party role by using the dropdown menu.
  - *Party text* -- add a description of the party (e.g., *President and C.E.O.*) if appropriate.
- After you make all necessary changes, click on the *Add Party* button.

Notes:

- You should not need to change the start date, since that field defaults to the date on which you enter the party information.
- Whatever information you enter into the *Party Information* screen's fields will subsequently be displayed at the beginning of the case's docket sheet.
- The party is not added to the case until you have completed the process. If you need to abort the process of adding the party to the case, click on one of the categories on the main blue menu bar.



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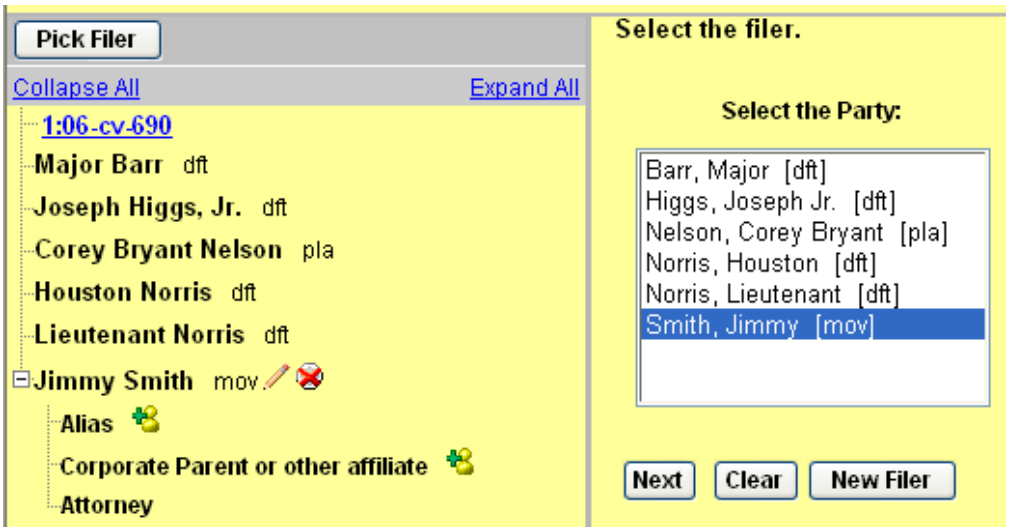
Adding a New Party: Completing the Process

Example 1 (continued) - Complete the process of adding a new party to the case by clicking on the *Add Party* button.

Note: The party is not added to the case until you have completed the process. If you need to abort the process of adding the party to the case, click on one of the categories on the main blue menu bar.

The screen shot below shows that the new party *Jimmy Smith* has been added to the party list. The next step would be to click on the *Next* button.



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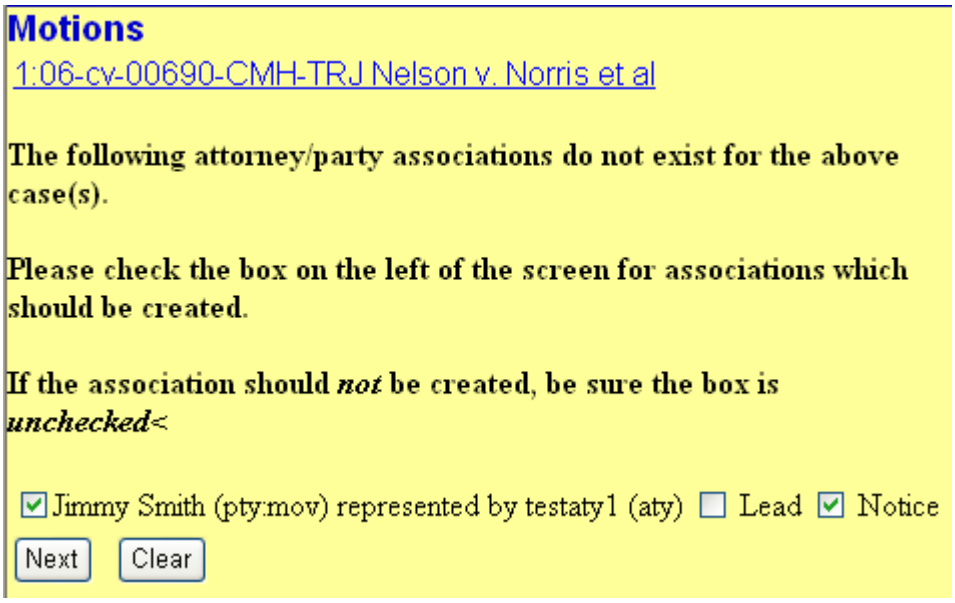
Adding a New Party: Creating the Attorney/Party Association

Example 1 (continued) - Create the attorney/party association by checking the *Lead* box and then clicking on the *Next* button. Continue filing in the case.

This shot shows what the screen looks like before you click in the *Lead* box.



Creating a New Party: Searching for a Business Name in the System

Example 2 - Search for a business name in the system by taking the following steps:

- Type the first few words of the company name, using initial caps (e.g., *Smith Fence*).
- Click on the *Search* button.

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Creating a New Party: Search Results

Example 2 (continued) - Create a new party in the system when the search does not yield the name of your party.

In the example below, searching for *Smith Fence Company* found no parties in the system with that name. The next step would be to click on the *Create new party* button.

Creating a New Party: Party Information Screen -- Notes

Example 2 (continued) – When you click on the *Create new party* button, the *Party Information* screen appears. Note that the party's name has been supplied in the *Last name* field at the top of the screen but may be modified. (See following page.)

- Use the *Party Information* screen to make changes as necessary:
  - *Last name* -- complete the last name, if necessary. (If you searched for the party using only a portion of the company name, e.g., *Jones Fence*, as shown below, you would need to complete the name by entering the word *Company* after *Fence* in the *Last name* field.)
  - *Role* -- change the party role by using the dropdown menu.
  - *Party text* -- add a description of the party (e.g., *a Virginia Corporation*).
- After you make all the necessary changes, click on the *Submit* button.

Notes:

- You should not need to change the start date, since that field defaults to the date on which you entered the party information.
- Whatever information you enter into the *Party Information* screen's fields will subsequently be displayed at the beginning of the case's docket sheet.

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Creating a New Party: Party Information Screen – Screen Shot

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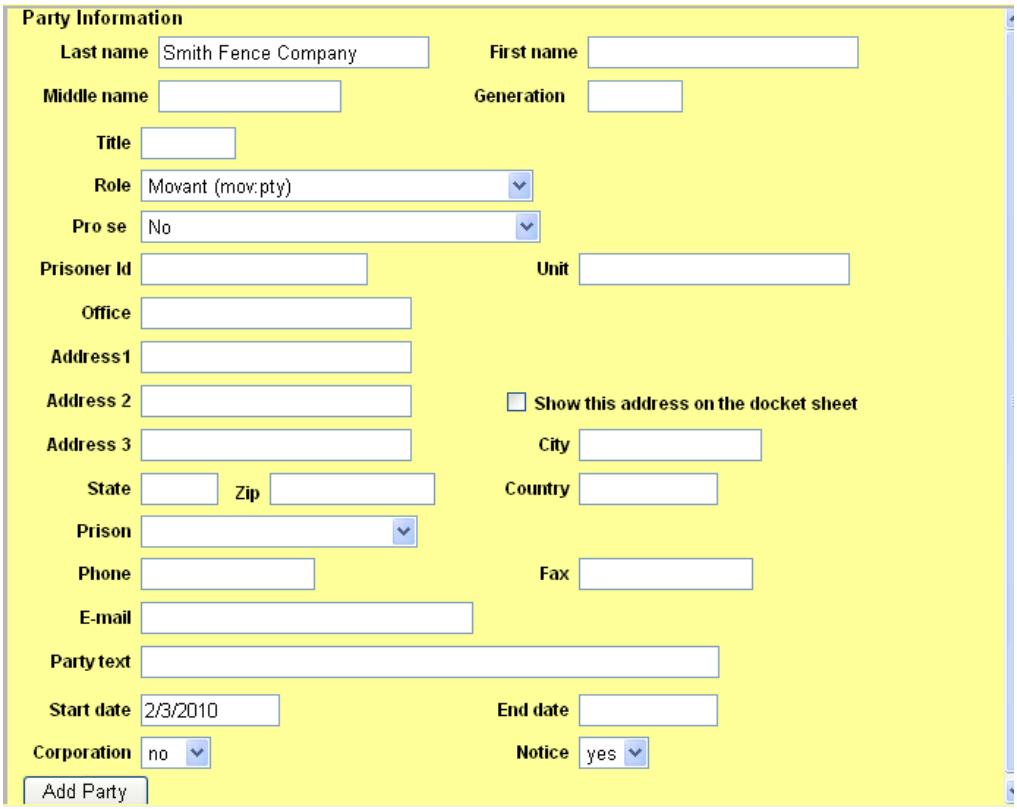

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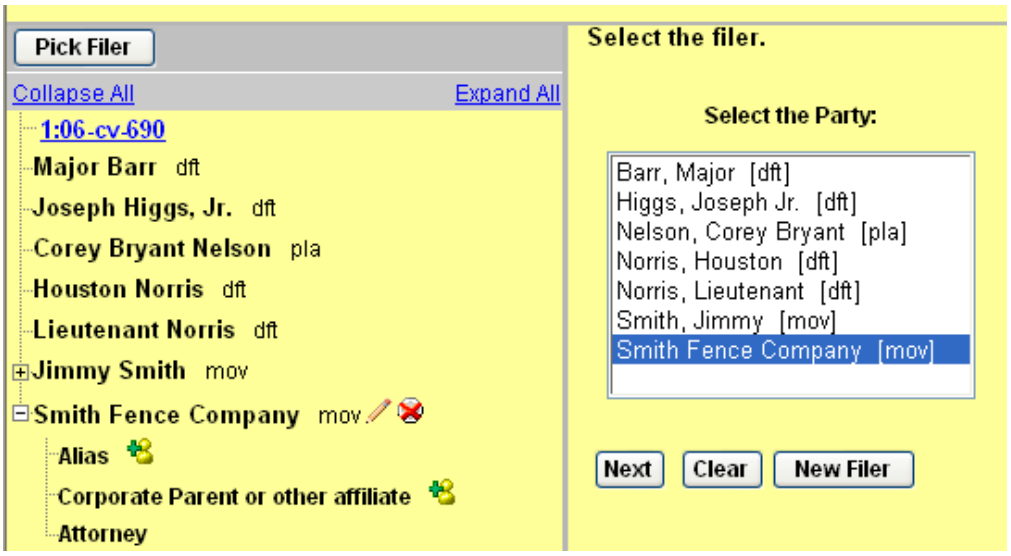
Creating a New Party: Completing the Process

Example 2 (continued) - Complete the process of adding a new party to the case by clicking on the *Next* button.

Note: The party is not added to the case until you have completed the process. If you need to abort the process of adding the party to the case, click on one of the categories on the main blue menu bar.

The screen shot below shows that the new party *Smith Fence Company* has been added to the party list.

The next step would be to click on the *Next* button.



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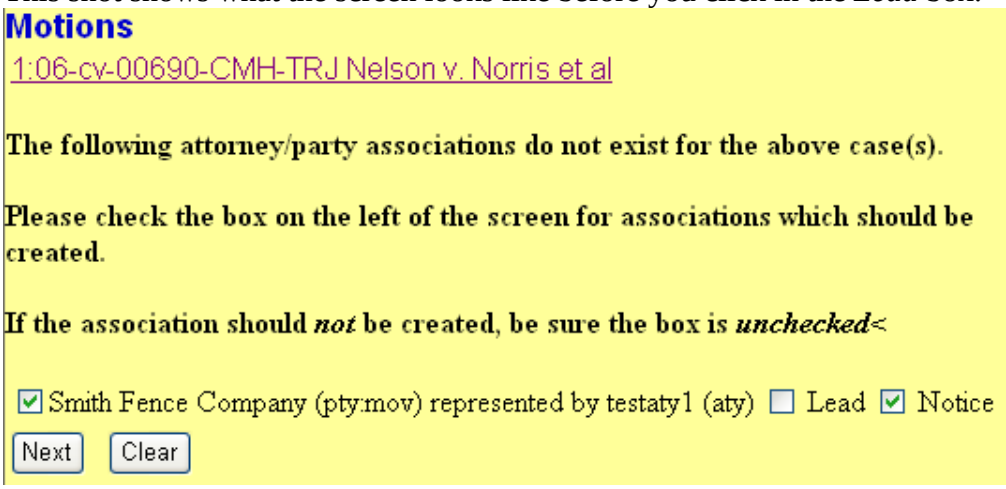
Creating a New Party: Creating the Attorney/Party Association

Example 2 - Create the attorney/party association by checking the *Lead* box and then clicking on the *Next* button. Continue filing in the case.

This shot shows what the screen looks like before you click in the *Lead* box.