

## 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:

Step	Action								
1	Click on the <i>New Filer</i> button on the right side of the pick filer screen during filing.								
2	Search for the party name in the system. <table border="1" data-bbox="565 995 1386 1367"> <thead> <tr> <th>If the search results...</th> <th>Then...</th> </tr> </thead> <tbody> <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 <i>Select Party</i> 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 <i>Create New Party</i> button.</td> </tr> <tr> <td>Indicate <i>No person found</i></td> <td>Click on the <i>Create New Party</i> button.</td> </tr> </tbody> </table>	If the search results...	Then...	Show a list of party names in the system, and your party name appears on the list	Select the party name by clicking on it and then click on the <i>Select Party</i> button.	Show a list of party names in the system, and your party name does not appear on the list	Click on the <i>Create New Party</i> button.	Indicate <i>No person found</i>	Click on the <i>Create New Party</i> button.
If the search results...	Then...								
Show a list of party names in the system, and your party name appears on the list	Select the party name by clicking on it and then click on the <i>Select Party</i> button.								
Show a list of party names in the system, and your party name does not appear on the list	Click on the <i>Create New Party</i> button.								
Indicate <i>No person found</i>	Click on the <i>Create New Party</i> button.								
3	Fill in the party's complete name and the role of the party (i.e., movant) on the <i>Party Information</i> screen. <b>Note:</b> Do not enter a party's address.								
4	Click on the <i>Add Party</i> button at the bottom of the screen.								
5	Click the <i>Next</i> button or <i>New Filer</i> button if adding more parties.								
6	Create the attorney/party association.								
7	Continue with the filing.								

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## Filing Procedures – Adding/Creating a New Party, Continued

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

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

**Motions**

[1:06-cv-00690-CMH-TRJ Nelson v. Norris et al](#)

**Pick Filer**

[Collapse All](#) [Expand All](#)

[1:06-cv-690](#)

- Major Barr dft
- Joseph Higgs, Jr. dft
- Corey Bryant Nelson pla
- Houston Norris dft
- Lieutenant Norris dft

**Select the filer.**

**Select the Party:**

- Barr, Major [dft]
- Higgs, Joseph Jr. [dft]
- Nelson, Corey Bryant [pla]
- Norris, Houston [dft]
- Norris, Lieutenant [dft]

**Next** **Clear** **New Filer**

**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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## Filing Procedures – Adding/Creating a New Party, Continued

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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.

The screenshot shows a web interface for a court filing system. At the top, there is a yellow header with the word "Motions" in blue. Below the header, a blue link reads "1:06-cv-00690-CMH-TRJ Nelson v. Norris et al". The main content area is divided into two columns. The left column contains a "Pick Filer" button, a "Collapse All" link, an "Expand All" link, and a list of filers: "1:06-cv-690", "Major Barr dft", "Joseph Higgs, Jr. dft", "Corey Bryant Nelson pla", "Houston Norris dft", and "Lieutenant Norris dft". The right column is titled "Search for a party" and contains a search form with three input fields: "Last / Business Name" (containing "Smith"), "First Name", and "Middle Name". A "Search" button is located below the input fields.

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## Filing Procedures – Adding/Creating a New Party, Continued

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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.

The screenshot shows a web interface for 'Motions' with the case number '1:06-cv-00690-CMH-TRJ Nelson v. Norris et al'. On the left, there is a tree view with '1:06-cv-690' expanded, listing parties: Major Barr (dft), Joseph Higgs, Jr. (dft), Corey Bryant Nelson (pla), Houston Norris (dft), and Lieutenant Norris (dft). On the right, there is a 'Search for a party' section with input fields for 'Last / Business Name' (containing 'Smith'), 'First Name', and 'Middle Name', and a 'Search' button. Below the search fields, the 'Search Results' list shows 'Smith, Gus' and 'Smith, Jimmy' (highlighted in blue). At the bottom of the search results are 'Select Party' and 'Create New Party' buttons.

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## Filing Procedures – Adding/Creating a New Party, Continued

### 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.

The screenshot shows the 'Party Information' screen for 'Jimmy Smith'. The left sidebar lists filers: Major Barr, Joseph Higgs, Jr., Corey Bryant Nelson, Houston Norris, and Lieutenant Norris. The main form contains the following fields and values:

- Title: [Empty]
- Role: Movant (mov:pty) [Dropdown]
- Pro se: No [Dropdown]
- Prisoner Id: [Empty]
- Unit: [Empty]
- Office: [Empty]
- Address 1: [Empty]
- Address 2: [Empty]
- Address 3: [Empty]
- State: [Empty]
- Zip: [Empty]
- City: [Empty]
- Country: [Empty]
- Prison: [Empty]
- Phone: [Empty]
- Fax: [Empty]
- E-mail: [Empty]
- Party text: [Empty]
- Start date: 2/3/2010
- End date: [Empty]
- Corporation: no [Dropdown]
- Notice: yes [Dropdown]

There is a checkbox labeled 'Show this address on the docket sheet' which is unchecked. An 'Add Party' button is located at the bottom left of the form area.

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## Filing Procedures – Adding/Creating a New Party, Continued

### 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.

The screenshot displays a web interface for selecting a filer. On the left, under the heading "Pick Filer", there is a tree view of parties. The root is "1:06-cv-690". Below it are several parties: Major Barr (dft), Joseph Higgs, Jr. (dft), Corey Bryant Nelson (pla), Houston Norris (dft), Lieutenant Norris (dft), and Jimmy Smith (mov). Jimmy Smith is expanded, showing sub-categories: Alias, Corporate Parent or other affiliate, and Attorney. On the right, under the heading "Select the filer.", there is a "Select the Party:" dropdown menu. The dropdown list contains: Barr, Major [dft], Higgs, Joseph Jr. [dft], Nelson, Corey Bryant [pla], Norris, Houston [dft], Norris, Lieutenant [dft], and Smith, Jimmy [mov]. The "Next" button is highlighted. At the bottom right of the dropdown area are "Clear" and "New Filer" buttons.

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## Filing Procedures – Adding/Creating a New Party, Continued

### 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.

**Motions**  
1:06-cv-00690-CMH-TRJ Nelson v. Norris et al

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*.

Jimmy Smith (pty:mov) represented by testaty1 (aty)  Lead  Notice

### 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.

**Motions**  
1:06-cv-00690-CMH-TRJ Nelson v. Norris et al

Pick Filer

Collapse All Expand All

1:06-cv-690

Major Barr dft

Joseph Higgs, Jr. dft

Corey Bryant Nelson pla

Houston Norris dft

Lieutenant Norris dft

Jimmy Smith mov

Search for a party

Last / Business Name Smith Fence First Name Middle Name

Search

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## Filing Procedures – Adding/Creating a New Party, Continued

### 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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# Filing Procedures – Adding/Creating a New Party, Continued

## Creating a New Party: Party Information Screen – Screen Shot

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Party Information			
Last name	Smith Fence Company	First name	
Middle name		Generation	
Title			
Role	Movant (mov:pty)		
Pro se	No		
Prisoner Id		Unit	
Office			
Address 1			
Address 2		<input type="checkbox"/> Show this address on the docket sheet	
Address 3		City	
State		Zip	
		Country	
Prison			
Phone		Fax	
E-mail			
Party text			
Start date	2/3/2010	End date	
Corporation	no	Notice	yes
<input type="button" value="Add Party"/>			

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## Filing Procedures – Adding/Creating a New Party, Continued

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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.

The screenshot displays a software interface for adding a party to a case. It is divided into two main sections: 'Pick Filer' and 'Select the filer.'.

- Pick Filer:** This section contains a tree view of the case's party list. At the top, there are 'Collapse All' and 'Expand All' links. Below them is the case number '1:06-cv-690'. The list includes:
  - Major Barr dft
  - Joseph Higgs, Jr. dft
  - Corey Bryant Nelson pla
  - Houston Norris dft
  - Lieutenant Norris dft
  - Jimmy Smith mov
  - Smith Fence Company mov (with edit and delete icons)
  - Alias (with add icon)
  - Corporate Parent or other affiliate (with add icon)
  - Attorney
- Select the filer.:** This section is titled 'Select the Party:' and contains a list box with the following entries:
  - Barr, Major [dft]
  - Higgs, Joseph Jr. [dft]
  - Nelson, Corey Bryant [pla]
  - Norris, Houston [dft]
  - Norris, Lieutenant [dft]
  - Smith, Jimmy [mov]
  - Smith Fence Company [mov] (highlighted)Below the list box are three buttons: 'Next', 'Clear', and 'New Filer'.

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## Filing Procedures – Adding/Creating a New Party, Continued

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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.

#### **Motions**

[1:06-cv-00690-CMH-TRJ Nelson v. Norris et al](#)

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*.

Smith Fence Company (pty:mov) represented by testaty1 (aty)  Lead  Notice

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