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 *New Filer* button on the right side of the pick filer screen during filing.
2	Search for the party name in the system. <table><tr><td>**If the search results…**</td><td>**Then…**</td></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>
3	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.
4	Click on the *Add Party* button at the bottom of the screen.
5	Click the *Next* button or *New Filer* button if adding more parties.
6	Create the attorney/party association.
7	Continue with the filing.

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		Select the filer.
Collapse All　　　　　　Expand All		**Select the Party:**
1:06-cv-690		Barr, Major [dft]
Major Barr dft		Higgs, Joseph Jr. [dft]
Joseph Higgs, Jr. dft		Nelson, Corey Bryant [pla]
Corey Bryant Nelson pla		Norris, Houston [dft]
Houston Norris dft		Norris, Lieutenant [dft]
Lieutenant Norris 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.

Filing Procedures – Adding/Creating a New Party, Continued

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.

Motions

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

Pick Filer		Search for a party
Collapse All	Expand All	Last / Business Name `Smith` First Name `     ` Middle Name `     `
1:06-cv-690		Search
Major Barr dft		
Joseph Higgs, Jr. dft		
Corey Bryant Nelson pla		
Houston Norris dft		
Lieutenant Norris dft		

Filing Procedures – Adding/Creating a New Party, Continued

**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.

Continued on next page

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.

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.

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.

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.

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., *Smith 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.

Filing Procedures – Adding/Creating a New Party, Continued

Creating a New Party: Party Information Screen – Screen Shot

Continued from previous page.

Party Information	
Last name Smith Fence Company	**First name**
Middle name	**Generation**
Title	
Role Movant (mov:pty)	
Pro se No	
Prisoner Id	**Unit**
Office	
Address1	
Address 2	☐ 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
Add Party	

Filing Procedures – Adding/Creating a New Party, Continued

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.

Continued on next page

Filing Procedures – Adding/Creating a New Party, Continued

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.