

Quick Tips for Adding Parties

- Before you get started, have your Complaint available. You will need this to add all parties in this case opening process.
- DO NOT select the browser back button at any time during the ‘Add Parties’ process or you will lose your entire work product. If you need to make a change to your party selection or simply change the spelling, utilize the icons provided in the participant tree.
- The goal is to have only one version of a particular name in the system.
- If the party name is already there, **DO NOT** add them again.

Search

- In the Last/Business Name field, enter the party name, surname or company name only and select Search.
- You can search with a minimum of two letters in the Last/Business Name field followed by an asterisk (i.e. Sm* for Smith, Smithwick, Small, etc.) for a wildcard to broaden the criteria entered.

Select or Create New Party

- If you find a match from the list, highlight the name from the list and click on the “Select Party” button.
- If no match is found, no name will appear in the Last/Business Name box, and search results will state “Search returned no results. Please try again or create a new party.”
- If you do not find a match, click on the “Create New Party” button.

Initial Caps: Only capitalize the first letter of a name or business unless the name is actually all capitals.

Title: **Do NOT use this box for titles.** If you would like to add a party’s job title (Doctor, Warden, Owner, etc.), please utilize the Party Text box.

Role: The first party entered is the Plaintiff. The parties should be entered in the manner and in the order in which they are captioned on the initiating document being filed. However, please refrain from using the “Petitioner” and “Respondent” party roles.

Party Information: Do not enter or edit any party information in the address, phone number, or fax fields, UNLESS the party is Pro Se. Then enter the address and phone number *ONLY*.

Fictitious Parties: Please remember that you are NOT to add fictitious or “John Doe” parties.

Examples of How to Enter Party Names

Individual Names:

Caption Name: Jane Marie Smith

Last Name: Smith

First Name: Jane

Middle Name: Marie

Caption Name: A. A. *(example for minor child)*

Last Name: A.

First Name: A.

Middle Name: *(leave blank if no middle initial listed)*

Business Names:

- Enter the full name of the business in the **Last Name** field.
- Do not use **First Name** or **Middle Name** fields.

Caption Name: The Boeing Company

Last Name: The Boeing Company

Caption Name: Wal-Mart, Inc. f/k/a Wal-Mart Stores, Inc.

Last Name: Wal-Mart, Inc.

Select Alias from the party listing tree at the left-side of the screen

Last Name: Wal-Mart Stores, Inc. (Select formerly known as or the correct descriptive)

Agency Names:

Caption Name: Kilolo Kijakazi, Acting Commissioner of Social Security

Last Name: Kijakazi

First Name: Kilolo

Middle Name:

Party Text: Acting Commissioner of Social Security