

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. 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 ultimate 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 * 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.

Enter Party Information

Punctuation: Do not use any punctuation in any field.

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

Title: The Title box is where you would enter title abbreviations such as Dr, Sgt, Hon, Rev, as appropriate.

- Do not use this box to enter Mr., Mrs., or Ms.
- Do not put periods after the abbreviation.
- Leave this field blank if no title applies.

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.

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*.

Examples of How to Enter Party Names

Individual Names:

Caption Name: Jane Doe Smith

Last Name: Smith

First Name: Jane

Middle Name: Doe

Caption Name: Jon Adolfo Cruz-Navi

Last Name: Cruz-Navi

First Name: Jon

Middle Name: Adolfo

Business Names:

- Enter the full name of the business in the **Last Name** field.
- Do not use **First Name** or **Middle Name** fields.
- Drop the small words such as **“The”** or **“A”** that precede the name of the business.

Caption Name: The Boeing Company

Last Name: Boeing Company

Caption Name: www.followdirections.com

Last Name: www.followdirections.com

Agency Names:

Caption Name: Nancy A. Berryhill, Commissioner of Social Security

Last Name: Commissioner of Social Security

Party Text (optional): Nancy A. Berryhill, Commissioner