Adding Parties to a Case
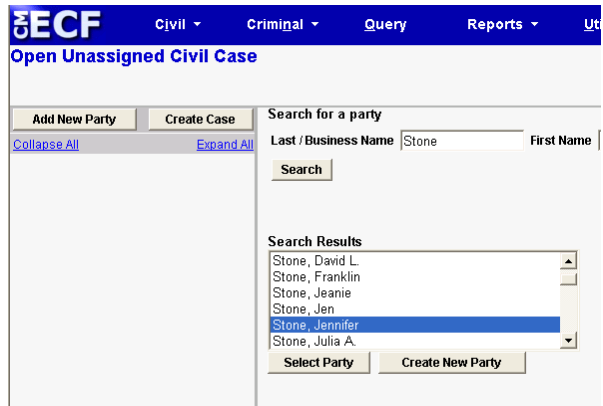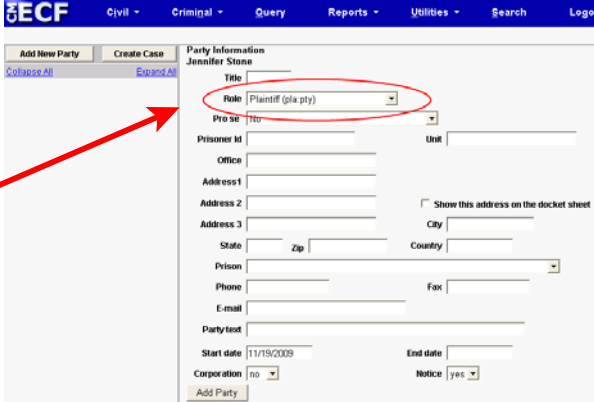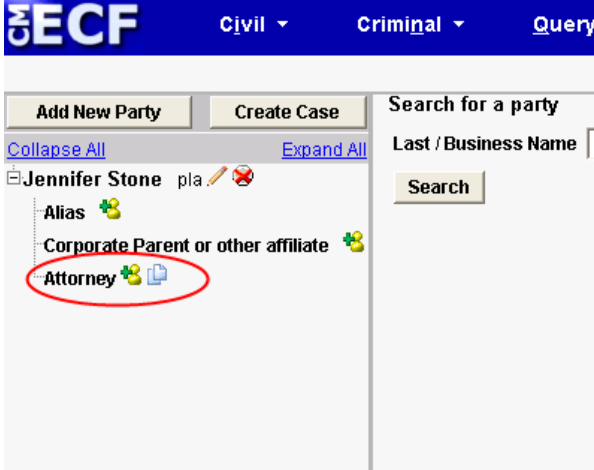
Overview

This procedure details the five steps for adding a party to a case, which are:
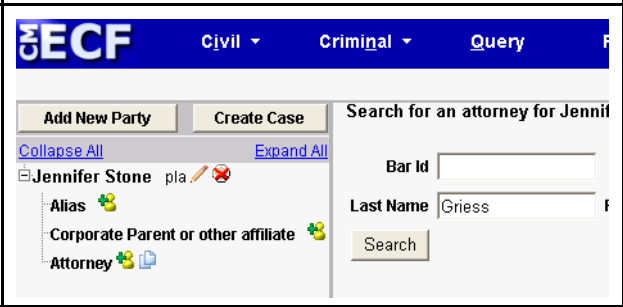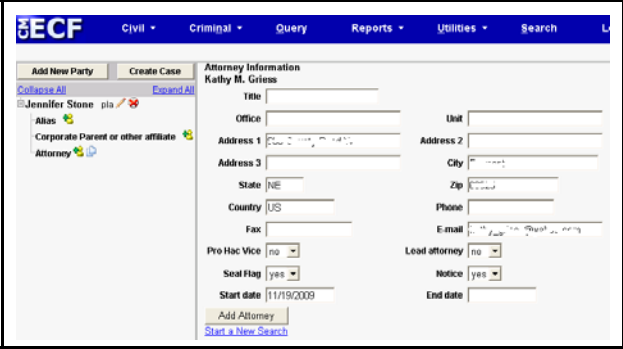
1. Search for the party by name.
2. Verify or enter the party name.
3. Select the party's role in the case.
4. Add aliases for the party, if any.
5. Select attorneys for the party, if known.

Repeat these steps for each party in the case.

Procedure

For demonstration purposes, the first plaintiff and the plaintiff's attorney will be added to a case in this procedure. Repeat the steps to add additional parties.

STEP	RESULT
1. Starting with the first plaintiff, search by typing the plaintiff's last name or the business name, and then click **Search**. *For this example, Jennifer A. Stone is being added as a party, so we searched for "Stone."*	
2. If the party is listed in the results field, click on the name and then click **Select Party**. Otherwise, click **Create New Party**. *Since Jennifer Stone is listed among the results, we will click the Select Party button.*	

Opening a Civil Case

STEP	RESULT
3. On the Party Information screen you should only fill out: • first, middle and last **name** (if a business, the entire business name goes into the Last name field), • the **role** of the party, and • **party text**, if any. (Note: The Party Text field is used for additional information about the party, such as *a minor child, next friend of..., or in his role as...*) **DO NOT add address information or e-mail addresses for parties.** *Don't forget to change the role to plaintiff!* **4.** Click **Add Party**.	
The party now displays in the "tree" on the left side of the Add Party screen. **5.** To add aliases, Corporate Parents, or attorneys for the party, use the Add icons. *We want to add an attorney for our plaintiff, so we will click the Add icon next to Attorney.*	

STEP	RESULT
6. Search for the attorney by typing the Bar Id or the attorney's last name. *For this example, we will add Kathy Griess as the attorney.*	
7. Select the attorney's name from the results list and then click **Select Attorney**. **8.** Do not change any fields on the Attorney Information screen. Click **Add Attorney**.	
9. The attorney now appears in the "tree" view on the left of the screen under the plaintiff. Repeat steps 6-8 to add all attorneys for this plaintiff.	

STEP	RESULT
10. Click **Add New Party**, then repeat steps 1-9 until all parties and all known attorneys have been added to the case. When finished adding all parties and attorneys, click **Create Case**.	
11. Your case has been opened and the case number has been assigned. **But you are not done yet!** Make a note of the case number, then click **Docket Lead Event?** to upload the necessary case opening document(s) and pay the filing fee.	

Opening a Civil Case