

Guide to Adding Parties in CM/ECF

Searching for a Party



The screenshot shows the 'Open a Civil Case' interface. On the left, there are buttons for 'Add New Party' and 'Create Case', along with 'Collapse All' and 'Expand All' links. Below these is a case identifier '2:20-cv-????'. On the right, there is a 'Search for a party' section with three input fields: 'Last / Business Name', 'First Name', and 'Middle Name', followed by a 'Search' button.

Parties must be searched for and added in ALL CAPITAL LETTERS. Enter the party name exactly as it appears in the caption of the complaint, including punctuation. If the search results display a party with same name double click on the party. Do **NOT** pick that party if it is listed with address information. Instead, select **Create New Party**. If you find an exact match for the party you entered, and the party does not have address information, choose **Select Party**. After choosing **Create New Party** or **Select Party** you will be taken to the **Party Information** screen.

On the **Party Information** screen use the Title field if the party name has a title in the caption of the complaint, e.g. MR., OFFICER.

Use the Party Text field if there is clarifying text in the caption of the complaint., e.g. IN HIS OFFICIAL CAPACITY, ACTING ON THEIR OWN BEHALF, etc.

Any titles that appear **after** a party's name should be added to Party Text, e.g. M.D., ESQ.

The Generation field is used for Jr., Sr., I, II, etc.

Parties that list a C/O in the caption should **NOT** have the C/O information added to Party Text. C/O is considered address information and should be omitted.

You must select the appropriate Role for the party you are adding.

Click Add Party when you are finished adding a party. Continue to Add New Party until all parties from the caption of the complaint appear on the Case Participant Tree, located on the left of the screen.

Searching for Individuals

Enter at least the first two letters of the individual's last name and first name in the corresponding fields and click **Search**. Examples of how to add individuals:

Caption Name: Tamika Myers
Last Name: MYERS
First Name: TAMIKA

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Caption Name: JAMES P. SMITH

Last Name: SMITH

First Name: JAMES

Middle Name: P.

Caption Name: Officer Carol Short

Last Name: SHORT

First Name: CAROL

Title field on the **Party Information** screen: OFFICER

Caption Name: JOHN DOES 1-5

Last Name: DOES

First Name: JOHN

Party Text field on the **Party Information** screen: 1-5

Caption Name: A.D., a minor, by and through his parents and natural guardians, T.D. and M.D.

Last Name: A.D.

Party Text field on the **Party Information** screen: A MINOR, BY AND THROUGH HIS PARENTS AND NATURAL GAURDIANS, T.D. AND M.D.

Searching for Companies, Agencies, Cities and all other non-individual parties

Enter the full name in the Last Name field and select Search. If the party begins with THE, make sure to include that in your search. If the caption abbreviates words such as CO. or INC., make sure to abbreviate them in your search.

Caption Name: Omnicare, Inc.

Last Name: OMNICARE, INC.

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Caption Name: ARAMARK, a Pennsylvania limited liability company

Last Name: ARAMARK

Party Text field on the **Party Information** screen: A PENNSYLVANIA LIMITED LIABILITY COMPANY

Party Information Screen

Open a Civil Case

The screenshot shows the 'Party Information' screen for a case. On the left, there is a sidebar with 'Add New Party' and 'Create Case' buttons, and a list of cases with 'Collapse All' and 'Expand All' links. The main form is titled 'Party Information' and contains the following fields: 'Title (OPTIONAL)' (text input), 'Role (REQUIRED)' (dropdown menu with 'SELECT A PARTY (select)' selected), 'E-mail (LEAVE BLANK)' (text input), 'Party text (OPTIONAL)' (text input), 'Start date' (1/24/2020) and 'End Date (LEAVE BLANK)' (text input), and 'Notice' (yes dropdown). At the bottom, there are 'Add Party' and 'Start a New Search' buttons.

Do **NOT** make any changes on this screen other than choosing the party's Role and entering Title and Party Text, if applicable.

Click **Add Party** to add the party to the Case Participant Tree.

Case Participant Tree

The Case Participant Tree displays all party information for parties that have been added to a case. Via the Case Participant Tree a filer can add an alias, make changes to an existing party or alias, and delete a party or alias.

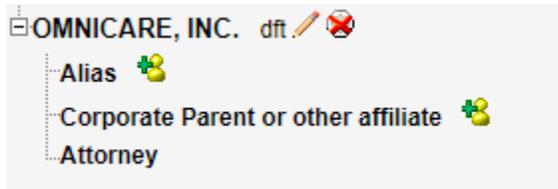
Icon	Description
	Delete a party or alias
	Add an alias
	Modify a party or alias

Include descriptions of Expand All and Collapse All?

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Aliases

If alias information is listed in the caption of the complaint you may add that information by selecting the **Alias** icon . Search for the alias name in the Last/Business Name field.



<u>Alias Types</u>	<u>Description</u>
agent	agent of
aka	also known as
dba	doing business as
fdba	formerly doing business as
fka	formerly known as
icms	
nee	born
obo	on behalf of
other	other
rpi	real party in interest
ta	trading as

Alias Information

Last/Business name First name

Middle name Generation

Type Start date

If your party's alias does not match one of the types in this list do not add the alias on this screen. Instead, select the edit icon  next to the party. Add the descriptive information in the Party Text field, e.g. NOW KNOWN AS DOW CHEMICAL COMPANY.

Corporate Parent or Other Affiliate

Do **NOT** add a Corporate Parent or Other Affiliate when you are adding a party. Instead, file a Disclosure Statement Form pursuant to Federal Rule of Civil Procedure 7.1 using the

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Disclosure Statement Form 7.1 event found under **Civil -> Discovery Documents**. File the Disclosure Statement only after the complaint is filed.

Create Case

Review your parties in the Case Participant Tree for final accuracy. Once you click **Create Case** you can **NOT** go back and add, delete and/or modify parties. When all parties appear correctly in the Case Participant Tree click **Create Case** to generate a case number and to open the case. This will complete the searching and adding parties' portion of opening a civil case and you will be prompted to begin the process of docketing your complaint.

