

## SECTION 4.0 OPENING A CASE

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### 4.1 Opening a Case

Case opening procedures will proceed in the traditional manner. Attorneys will continue to tender the filing fees to the Clerk's Office, along with an original and copy of the complaint or petition, civil cover sheet, and requested service of process forms. For all non-removal civil actions, if the Plaintiff elects to file electronically, he/she shall include a .pdf copy of all initial case papers concurrent with the conventional filings. For all removed civil actions, if the removing party elects to file electronically, he/she shall submit a .pdf copy of all initial papers (including state court documents) within three (3) business days of the filing. Submission of these electronic records may be on a 3.5 inch diskette or CD Rom. (See [Local Rule 100.4 - Filing Initial Papers With the Court](#).) The documents will be filed by the court clerk who will collect any applicable fee, issue a receipt, assign the case number and judge, issue process and generate case management orders to the filing attorney for service. Staff will also enter case opening statistical information and party information for that case in CM/ECF.

### 4.2 Case Opening Statistical Information

Court staff will enter the appropriate statistical case opening information from the drop down menus provided.

### 4.3 Adding Parties

Party information is added next. Search the database for existing party names before adding new names. (See also [Section 14.0 - Conventions and Standards](#)). To perform the search, enter the first few letters of the party's last name into the search window provided and hit "Search". A drop down window will display all names which match the entered search criteria. Please note that the list is alphabetized by last name only, and not by first name. You need to scroll through the whole list to determine if the party name is already in the database to avoid creating a duplicate party record. Search criteria is not case sensitive.

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If the party exists, highlight the name. Do not duplicate exact party names in the database. Only one name may be selected at a time in this window. **Address information should only be added for pro se litigants. Additionally, DO NOT insert Social Security numbers or tax identification numbers.** The court does not need to maintain personal address records for represented parties. Alias name information may also be added by selection of the “Alias” button. The system does not limit the number of alias names associated with a party.

Next, select the party role from a drop down list showing available role types. After selecting the correct type, go to the Pro Se box. If the party is a pro se litigant, select yes "y". If the party is represented by an attorney select no "n". The system will default to "n".

The Party Text field is reserved for extended descriptions of the party (i.e. *a Delaware Corporation*). When done, hit “Next”.

New names may be added by selecting “Create New Party” from the search display screen.

### 4.4 Adding Attorneys

Select the “Attorney” button at the bottom of the Party Information screen to link an attorney to the party. The function of adding an attorney is similar to the addition of a party. Attorneys may be searched by the digits of their Oregon Bar ID number or by last name. Note that the letters OSB should not be used as a prefix.

You can review the attorneys for the party currently being entered by selecting the “Review” button. When that party information is complete, hit “Submit”.

### 4.5 Case Opening Complete

Repeat the addition of party and attorney information for remaining plaintiffs and defendants. Remember that some names are common and some parties (i.e., a warden of a prison, or the Commissioner of the Social Security Administration) will have several pending actions. A match of the name you are searching for does not necessarily mean you have selected the same person. Do not duplicate exact party names in the database. When all parties, aliases, and attorneys are added, hit “End Party Selection”. The system will then confirm that you have successfully opened your new case.

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