CM/ECF Party Name Data Conventions Manual

Guide for Attorneys and Court Staff on How to Enter Party Names

Western District of Pennsylvania   *March 2024*

Introduction

This guide contains the preferred style practices for all users of the CM ECF application in the Western District of Pennsylvania to properly search and enter party names. The intention of the guide is to make everyone's task easier, whether they are entering data or inquiring into the CM/ECF database, thus displaying information in more uniform and predictable ways, as well as reducing confusion and errors.

The purpose of establishing conventions and standards for party name entries is to facilitate litigation searches and to avoid duplication of party names in the database. It is important to do a thorough search to avoid entering duplicate information. The guiding principle for party name entry is to spell and enter it exactly as it appears on the pleading. Searches are conducted by entering only the first few letters of the last name of a person, business, municipality, organization, or agency. The information will be retrieved only as it appears on the system database.

Searching For a Party in CM ECF

It is very important that you search ECF for the parties in your case to determine whether they have previously been involved in litigation in this district and are therefore already in the ECF system. Please conduct a thorough search and do not create a new party unless absolutely necessary.

Searching for a Party in ECF

1. Search for and add parties to the case in the precise order in which they appear in the pleading.

2. In the Last / Business Name field, enter two or more consecutive characters, then click the **[Search]** button. *Example*: for the name "Anderson," "Ande" would work as a search parameter.

3. A list of party names matching your criteria may appear. Click on the name of the correct party to highlight it and click the **[Select Party]** button.

4. If your search finds no matches in the ECF system, you will receive a message indicating the search produced no results and no names will appear in the search results field. If this occurs, broaden the search parameters and try again.

Party Name Search Hints

- Enter at least two consecutive letters or characters of a party's name.

- The search is not case sensitive, but party names should be entered in ALL CAPITAL LETTERS.

- You can enter a wild card before letters, to take the place of other letters. For example: Enter "*am" and find Bob Cunningham and Judy Amhurst, but not Steven Armstrong since the letters are not consecutive. A wild card (*) is not required at the end of a search string.

- When searching for a party DO NOT use an asterisk or star at the beginning of the word. But an asterisk or star may be used before or within search strings. For example, Villa*; Agricult*re Dep*, Dep*t of Justice.

- Try alternate searches if you first search is not successful. First, search for the entire party's name (i.e., World Communications). If that is not successful, you can search for part of the party's name (i.e. World Comm or just World).

- Always begin with a broad search and narrow it down by entering more of the party name if the results are too voluminous.

- When searching, if just the last name is entered, CM ECF may return a list of a hundred parties with that last name. However, if you know the first name or initial, you can add that to the first name field to narrow your search. For example, instead of entering Grant only, if you search for Carol Grant, you will retrieve Carol A. Grant and Carolyn Grant.

- If there are articles in the title such as "A" or "The", you may or may not need to include the article in the search. For example, a search request for The Daily News may not produce a result. But a search request for Daily News may be successful. Likewise a search for Daily News may not produce a result; but a search for The Daily News may be successful.

- Search by last name "Doe", if you have parties referenced as "Jane Doe, John Doe, Doe, or Does".

Creating a New Party in CM ECF

It is very important that you search ECF for the parties in your case to determine whether they have previously been involved in litigation in this district and are therefore already in the ECF system. Please conduct a thorough search and do not create a new party unless absolutely necessary.

Creating a New Party in ECF

If your broadest search does not yield your party, click the **[Create New Party]** button to add the party to the system.

Please follow the party name data conventions in this manual when adding a new party in ECF. Party names entered in ECF should exactly match the party names listed on the complaint or other pleading.

If unsure how a specific party name should be entered, please contact the Clerk's Office for guidance at 412-208-7500 (Pittsburgh), 814-464-9600 (Erie), or 814-533-4504 (Johnstown).

Proper Format and Style Conventions for Names – The Basics

These style conventions apply to all names entered in the CM/ECF application:

- If the name appears on the list in the database, select it to help eliminate different versions or duplicates of the same party name.

- Use all upper-case characters for all party names (*e.g.* WALLACE D. SMITH) and titles (*e.g.* DR. WALLACE D. SMITH). Party text is not required to be in all upper-case characters. (*e.g.* DR. WALLACE D. SMITH, individually and in his official capacity)

- Use single spacing between all names and initials and punctuation if appropriate. (*e.g.* J. J. JONES, SMITH, INC., CW BRADFORD Ltd., PATRICK MACDOUGAL, KATHLEEN O'BRIEN)

- When typing names that have apostrophes or hyphens, do not insert spaces. Use apostrophes or hyphens in the last name or first name field when necessary. (*e.g.* D'ANDRE SMITH, MARY BAKER-JONES).

- Business names should be entered entirely in the Last / Business Name field. Do not use the First Name or Middle Name field when entering business names. The Last / Business Name field fits up to 200 characters.

- Do not use the ampersand sign (&) for "and" unless it is part of a company name on the petition or pleading. (*e.g.* B & D COMPANY, CAMERON & ASSOCIATES)

If unsure how a specific party name should be entered, please contact the Clerk's Office for guidance at 412-208-7500 (Pittsburgh), 814-464-9600 (Erie), or 814-533-4504 (Johnstown).

Proper Format and Style Conventions for Names – Additional Fields

It may or may not be necessary to complete all the fields listed on the Party Information screen. See details as follows:

Generation

If the party has a generational suffix or post-nominal letters following the name in the pleading, you will enter the generation information (*e.g.* Jr., Sr., III, IV, etc.) in the generation field.

Title

If a party has a title which precedes the name on the pleading, add it (*e.g.* DR., REV., NURSE PRACTITIONER, WARDEN, C/O, etc.) in the Title Field.

NOTE: The information entered in the title field (*e.g.* DR., REV., etc.), will only appear on the docket sheet, not in the docket text.

Role

Select the appropriate party role (*e.g.* plaintiff or defendant). Please refer to appendix of this guide for a list of available party role codes.

The role will default to defendant; change the role, as necessary.

Address Fields

Do not add the address, phone or fax information for the party, unless they are pro se litigant. Ensure the address fields are blank, and delete the fields, if needed, before accepting the party information screen.

If the party is pro se and a prisoner, select a prison from the drop-down list in the Prison field and be sure to enter a Prisoner ID.

INDIVIDUAL PERSONS NAMES

When entering an individual's name, enter the full last name, full first name, middle name (or initial) in the designated fields in ALL CAPITAL LETTERS.

Individuals

Enter the full last name, full first name, middle name (or initial) in the designated fields.

Example: Mary Jane Smith

Last / Business Name:	SMITH
First Name:	MARY
Middle Name:	JANE
Generation:	
Title:	
Party text:	

If the middle name or initial is not listed on the pleading, then leave it blank and enter only the full last name and full first name in the designated fields.

Example: Mary Smith

Last / Business Name:	SMITH
First Name:	MARY
Middle Name:	*(Leave Blank)*
Generation:	
Title:	
Party text:	

If only initials are listed on the pleading, enter the full last name, then enter the initials in the designated fields.

Example: M. J. Smith

Last / Business Name:	SMITH
First Name:	M.
Middle Name:	J.
Generation:	
Title:	
Party text:	

Example: M. Jane Smith

> Last / Business Name: SMITH
> First Name: M.
> Middle Name: JANE
> Generation:
> Title:
> Party text:

Enter the full last name, full first name, middle name (or initial) in the designated fields. If the party has multiple middle names, enter the multiple middle names in the Middle Name field.

Example: Michael John Paul Martin

> Last / Business Name: MARTIN
> First Name: MICHAEL
> Middle Name: JOHN PAUL
> Generation:
> Title:
> Party text:

Individuals Sued in Individual and Official Capacity

When entering a party being sued as an individual and in their official capacity, enter the party once.

Enter the full last name, full first name, middle name (or initial) in the designated fields. If the party has a title, enter the title of the party in the Title field. Enter the additional text in the Party Text field.

Example: Lieutenant George Smith, Individually and in his official capacity

> Last / Business Name: SMITH
> First Name: GEORGE
> Middle Name: *(Leave Blank)*
> Generation:
> Title: LIEUTENANT
> Party text: Individually and in his official capacity

Individuals in Class Action Cases

When entering a party who is filing an action individually and on behalf of all others similarly situated, enter the party once.

Enter the full last name, full first name, middle name (or initial) in the designated fields. Enter the additional text in the Party Text field.

Example: Jane W. Walton, Individually and on behalf of all others similarly situated

Last / Business Name:	WALTON
First Name:	JANE
Middle Name:	W.
Generation:	
Title:	
Party text:	Individually and on behalf of all others similarly situated

Individuals as Representatives of a Deceased Person

When entering a party who is filing an action individually and on behalf of a deceased person, enter the party once. The deceased is not a party; the representative is. The estate is not a party unless specifically designated in the case caption.

Enter the full last name, full first name, middle name (or initial) in the designated fields. Enter the additional text in the Party Text field.

Example: Jane W. Walton, Individually and as surviving spouse of John L. Walton

Last / Business Name:	WALTON
First Name:	JANE
Middle Name:	W.
Generation:	
Title:	
Party text:	Individually and as surviving spouse of John L. Walton

When entering the representative of the estate of a deceased person as a party, enter the full last name, full first name, middle name (or initial) in the designated fields. Enter the representative's role and the name of the estate in the Party Text field.

Example: Jane W. Walton, Executrix of the Estate of John L. Walton, deceased

Last / Business Name:	WALTON
First Name:	JANE
Middle Name:	W.
Generation:	
Title:	
Party text:	Executrix of the Estate of John L. Walton, deceased

Individuals who are Prisoners

When entering a party who is a prisoner, include the Prisoner ID Number in the Prisoner ID field, if it is known.

Enter the full last name, full first name, middle name (or initial) in the designated fields. Enter the Prisoner ID Number in the Prisoner ID field, if it is known. *Do NOT enter the Prisoner ID Number as Party text.*

Example: Robert A. Smith, 12345-678

Last / Business Name:	SMITH
First Name:	ROBERT
Middle Name:	A.
Generation:	
Title:	
Prisoner ID:	12345-678
Party text:	

SURNAMES

When entering a party who has two surnames which are not hyphenated, the two surnames together should be entered in the Last Name field. *The first surname should NOT be entered as a middle name.*

Example: SYLVIA PALMER JOHNSON

Last / Business Name:	PALMER JOHNSON
First Name:	SYLVIA
Middle Name:	
Generation:	
Title:	
Party text:	

If the party's two surnames are joined by a hyphen, both should be entered in the Last Name field and the hyphen must be included.

Example: SHIRLEY MARIE PRICE-COOPER

Last / Business Name:	PRICE-COOPER
First Name:	SHIRLEY
Middle Name:	MARIE
Generation:	
Title:	

Party text:

If the party's two surnames are joined by *y, de, del,* or *de la*, both surnames should be entered in the Last Name field and the joining word must be included.

Example: DELORES VILLEGAS DE AGUIRRE

Last / Business Name: VILLEGAS DE AGUIRRE
First Name: DELORES
Middle Name:
Generation:
Title:
Party text:

BUSINESS NAMES

When entering a business name, enter the full and complete name exactly as it appears in the pleading in the Last / Business Name field only.

Business Names without Punctuations or Abbreviations

Enter the full and complete agency/business name as referenced in the pleading in the Last / Business Name field only.

Example: One Beacon Insurance Company

Last / Business Name: ONE BEACON INSURANCE COMPANY
First: *(Leave Blank)*
Middle Name: *(Leave Blank)*
Generation: *(Leave Blank)*
Title: *(Leave Blank)*
Party text:

Business Names with Punctuations or Abbreviations

Enter the full and complete agency/business name exactly as listed in the pleading in the Last / Business Name field only, including proper punctuation.

Example: Wood Bros. Manufacturing Corp.

Last / Business Name: WOOD BROS. MANUFACTURING CORP.
First: *(Leave Blank)*
Middle Name: *(Leave Blank)*
Generation: *(Leave Blank)*
Title: *(Leave Blank)*
Party text:

Business Names that Begins with an Article (A, An, The)

Enter the full and complete agency/business name exactly as listed in the pleading in the Last / Business Name field only, including any leading "A", "An" or "The."

Example: The Wood Bros. Manufacturing Corp.

Last / Business Name:	THE WOOD BROS. MANUFACTURING CORP.
First:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	

CORRECTIONAL FACILITIES

When entering the names of correctional facilities, enter the names of the correctional facilities exactly as they appear in the pleading in the Last / Business Name field only.

Example: State Correctional Institution Forest

Last / Business Name:	STATE CORRECTIONAL INSTITUTION FOREST
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	

Example: SCI Forest

Last / Business Name:	SCI FOREST
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	

Example: Allegheny County Jail

Last / Business Name:	ALLEGHENY COUNTY JAIL
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	

DOMAIN NAMES

When entering domain names as a party, enter the domain names in the Last / Business Name field only exactly as it appears in the pleading. Include any periods (or dots as they are known in the computer world) or backslashes.

Example: Facebook.com

Last /Business Name:	FACEBOOK.COM
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	

Example: FTD.com, Inc.

Last /Business Name:	FTD.COM, INC.
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	

Example: www.twoifbysea.COM

Last /Business Name:	WWW.TWOIFBYSEA.COM
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	

Example: http://www.oneifbyland.net

Last /Business Name:	HTTP://WWW.ONEIFBYLAND.NET
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	

ESTATE NAMES

When entering the estate of a deceased as a party, enter the party name, including the name of the deceased, exactly as it appears in the pleading in the Last / Business Name field (only). Type the descriptive information in the Party text field.

Example: Estate of John A. Goldsmith, deceased

Last / Business Name:	ESTATE OF JOHN A. GOLDSMITH
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	Deceased

Example: The Estate of Jane E. Smith, deceased

Last / Business Name:	THE ESTATE OF JANE E. SMITH
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	Deceased

GOVERNMENT ENTITIES

United States Government

If the litigant is the US, U.S. or U.S.A., enter the party name exactly as it appears in the pleading, including any punctuation, in the Last / Business Name field.

Example: US

Last / Business Name :	US
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	

Example: U.S.A.

Last / Business Name:	U.S.A.
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	

Example: United States

Last / Business Name:	UNITED STATES
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	

Example: United States of America

Last / Business Name:	UNITED STATES OF AMERICA
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	

United States Government Agencies

When entering an agency name as a party, enter the agency name in the Last / Business Name field only.

Example: Social Security Administration

Last / Business Name:	SOCIAL SECURITY ADMINISTRATION
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	

If the agency name is an acronym, enter the acronym exactly as it appears in the pleading. If a District Office or Branch Office is specified for an agency; enter the District Office or Branch Office information in the Party text field.

Example: SEC

Last / Business Name:	SEC
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	

Example: USPS, Johnstown Branch

Last / Business Name: USPS
First Name: *(Leave Blank)*
Middle Name: *(Leave Blank)*
Generation: *(Leave Blank)*
Title: *(Leave Blank)*
Party text: Johnstown Branch

United States Government Officials

If the individual who is a head of a US agency is named as a party, enter the name of the head of the agency in the same way that the name of an individual is entered, then type the descriptive information in the Party text field.

Example: Michael J. Astrue, Commissioner of Social Security Administration

Last / Business Name: ASTRUE
First Name: MICHAEL
Middle: Name: J.
Generation:
Title:
Party text: Commissioner of Social Security Administration

Example: Eric H. Holder, Jr. Attorney General

Last / Business Name: HOLDER
First Name: ERIC
Middle Name: H.
Generation: JR.
Title:
Party text: Attorney General

If the head of a US agency is named as a party but not by the individual's name, enter the name of the head of the agency in the Last / Business Name field.

Example: Commissioner of Social Security

Last / Business Name: COMMISSIONER OF SOCIAL SECURITY
First Name: *(Leave Blank)*
Middle Name: *(Leave Blank)*
Generation: *(Leave Blank)*
Title: *(Leave Blank)*
Party text:

GOVERNMENT ENTITIES – CITIES, COUNTIES, STATES, DEPARTMENTS AND BOARDS NAMES

When entering the name of a city, county, state, agency, board and department as a party, enter the name of the city, county, state, agency, board or department in the Last / Business Name field exactly as it appears in the pleading. Many cities, counties, and states already exist as parties in ECF, so be sure to select the existing party rather than creating a new party unless necessary.

Cities

If the litigant is a city, enter the party name exactly as it appears in the pleading in the Last / Business Name field.

Example: City of Erie

Last / Business Name:	CITY OF ERIE
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	*(Leave Blank)*

Example: Pittsburgh, Pennsylvania

Last / Business Name:	PITTSBURGH, PENNSYLVANIA
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	*(Leave Blank)*

Counties

If the litigant is a county, enter the party name exactly as it appears in the pleading in the Last / Business Name field.

Example: County of Venango

Last / Business Name:	COUNTY OF VENANGO
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	*(Leave Blank)*

Example: Westmoreland County

Last / Business Name:	WESTMORELAND COUNTY
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	*(Leave Blank)*

States

If the litigant is a state, enter the party name exactly as it appears in the pleading in the Last /Business Name field.

Example: Pennsylvania State

Last / Business Name:	PENNSYLVANIA STATE
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	*(Leave Blank)*

Example: Commonwealth of Pennsylvania

Last / Business Name:	COMMONWEALTH OF PENNSYLVANIA
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	*(Leave Blank)*

City, County and State Agencies, Boards and Departments

If the litigant is a city, county, state agency, board, or department, enter the party name exactly as it appears in the pleading in the Last / Business Name field.

Example: City of Pittsburgh Fire Department

Last / Business Name:	CITY OF PITTSBURGH FIRE DEPARTMENT
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	*(Leave Blank)*

Example: Fayette County Board of Commissioners

Last / Business Name: FAYETTE COUNTY BOARD OF COMMISSIONERS
First Name: *(Leave Blank)*
Middle Name: *(Leave Blank)*
Generation: *(Leave Blank)*
Title: *(Leave Blank)*
Party text: *(Leave Blank)*

JOHN DOE AND JANE DOE NAMES

When a defendant is unknown by the plaintiff and a pleading is drafted with names such as Doe, enter the names of the Does in the same way that the name of an individual is entered, then type any title in the Title field or descriptive information in the Party text field.

Example: John Doe

Last / Business Name: DOE
First Name: JOHN
Middle Name:
Generation:
Title:
Party text:

Example: C/O Jane Doe

Last / Business Name: DOE
First Name: JANE
Middle Name:
Generation:
Title: C/O
Party text:

Example: John Does 1-10

Last / Business Name: DOES
First Name: JOHN
Middle Name:
Generation:
Title:
Party text: 1-10

Example: John Doe, as Trustee of the Mutual View Trust Fund

Last / Business Name:	DOE
First Name:	JOHN
Middle Name:	
Generation:	
Title:	
Party text:	as Trustee of the Mutual View Trust Fund

MINORS LISTED AS PARTIES AND MINORS WITH REPRESENTATIVES NAMES

When adding a minor's name as a party, in compliance with federal and local rules, use only the initials to identify the minor, unless the court orders otherwise.

Minors Listed Individually

When the minor is listed individually, enter the last name initial in the Last / Business Name field and the first name initial in the First Name field, each with a period. Enter any descriptive text in the Party text field.

Example: J.S., a minor

Last / Business Name:	S.
First Name:	J.
Middle Name:	
Generation:	
Title:	
Party text:	a minor

Minors Listed with a Representative

When the minor is listed with a representative or representatives, enter the name of each representative and the minor's initials as separate parties. The "next friend," "guardian," or "personal representative," information is entered in the Party text field.

Example: J.S., a minor child by Robert Smith, Parent and Next Friend

Last / Business Name:	S.
First Name:	J.
Middle Name:	*(Leave Blank)*
Generation:	
Title:	
Party text:	a minor child by

Last / Business Name: SMITH
First Name: ROBERT
Middle Name: *(Leave Blank)*
Generation:
Title:
Party text: Parent and Next Friend

REAL PROPERTY NAMES

When entering the names of real property as a party, enter the party name exactly as it appears in the pleading in the Last / Business Name field only. Any descriptive text following the party name may be entered in the Party text field.

Example: One Parcel of Real Estate located at 23 Elm Street, Altoona, PA

Last / Business Name: ONE PARCEL OF REAL ESTATE LOCATED AT 23 ELM STREET, ALTOONA, PA
First Name: *(Leave Blank)*
Middle Name: *(Leave Blank)*
Generation: *(Leave Blank)*
Title: *(Leave Blank)*
Party text: *(Leave Blank)*

Example: One Parcel of Real Estate located at 23 Elm Street, Altoona, PA, including the appurtenances thereto and the improvements thereon

Last / Business Name: ONE PARCEL OF REAL ESTATE LOCATED AT 23 ELM STREET, ALTOONA, PA
First Name: *(Leave Blank)*
Middle Name: *(Leave Blank)*
Generation: *(Leave Blank)*
Title: *(Leave Blank)*
Party text: including the appurtenances thereto and the improvements thereon

UNION NAMES

When entering union names as a party, enter the official union name in the Last / Business Name field exactly as it appears in the pleading. If the trustees of a union are named as parties, enter the names of the trustees in the same way that the name of an individual is entered, then type the descriptive information in the Party text field.

Example: United Textile Workers Union

Last / Business Name:	UNITED TEXTILE WORKERS UNION
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	

Example: James Smith, Mary Jones, Richard Lyons as Trustees of Local 123 Welfare, Pension, Annuity and Job Training Trust Funds

Last / Business Name:	SMITH
First Name:	JAMES
Middle Name:	
Generation:	
Title:	
Party text:	

Last / Business Name:	JONES
First Name:	MARY
Middle Name:	
Generation:	
Title:	
Party text:	

Last / Business Name:	LYONS
First Name:	RICHARD
Middle Name:	
Generation:	
Title:	
Party text:	as Trustees of Local 123 Welfare, Pension, Annuity and Job Training Trust Funds

UNKNOWNS

When entering unknowns as a party, enter unknown information in the Last / Business Name field only as referenced in the pleading.

Example: Unknown Agents

Last / Business Name:	UNKNOWN AGENTS
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	

Example: Unknown Officers

Last / Business Name:	UNKNOWN OFFICERS
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	

VESSEL NAMES INFORMATION

When entering the name of a vessel as a party, enter the name of the vessel as shown below in the Last / Business Name field only. Any descriptive text following the vessel name may be entered in the Party text field.

Example: M/V Sun Star, its engines, tackle, and appurtenances, in rem

Last / Business Name:	M/V SUN STAR
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	its engines, tackle, and appurtenances, in rem

Example: One 25' Vessel Registered as TNL 2102 GE, its inventory and trailer

Last / Business Name:	ONE 25' VESSEL REGISTERED AS TNL 2102 GE
First Name:	*(Leave Blank)*
Middle Name:	*(Leave Blank)*
Generation:	*(Leave Blank)*
Title:	*(Leave Blank)*
Party text:	its inventory and trailer

PARTY ROLE TYPE DEFINITION

The Role field on the Party Information screen is used to identify/describe a party's role in a case.

When a party name is selected from the list or a party name is created, a Party Information screen appears. This allows the user to enter pertinent party information. The Role field is one of the pertinent fields the user will need to complete. * The Role field will default to Defendant. It is important that the user selects the appropriate Role type on the Party Information screen.

PARTY ROLE TYPE DEFINITION TABLE	
DESCRIPTION	CODE
Defendant*	(dft:pty)*
Amicus	(am:pty)
Appellant	(a:pty)
Appellee	(e:pty)
Arbitrator	(arb:pty)
Assignee	(assign:pty)
Claimant	(clm:pty)
Consol Claimant	(conclm:pty)
Consol Counter Claimant	(concnc:pty)
Consol Counter Defendant	(concnd:pty)
Consol Cross Claimant	(concrc:pty)
Consol Cross Defendant	(concrd:pty)
Consol Third Party Defendant	(con3df:pty)
Consol Third Party Plaintiff	(con3pl:pty)
Counter Claimant	(cc:pty)
Counter Defendant	(cd:pty)
Creditor	(cr:pty)
Cross Claimant	(crc:pty)
Cross Defendant	(crd:pty)
Custodian	(cust:pty)
Debtor	(db:pty)
Debtor-in-Possess	(dbpos:pty)
Defendant	(dft:pty)
Defendant Consolidated	(condft:pty)
Evaluator	(eval:pty)
FourthParty Defendant	(4pd:pty)
FourthParty Plaintiff	(4pp:pty)

PARTY ROLE TYPE DEFINITION TABLE	
DESCRIPTION	**CODE**
Garnishee	(gar:pty)
Grand Jury Witness	(gjwit:pty)
IN RE: DISCIPLINE OF	(inredisc:pty)
IN THE MATTER OF THE APPLICATION OF	(itmatapp:pty)
IN THE MATTER OF THE SEARCH OF	(intmatse:pty)
IN THE MATTER OF THE SEIZURE OF	(itmatszr:pty)
IN THE MATTER OF THE SUBPOENA OF	(intmatsu:pty)
IN THE MATTER OF THE TAX INDEBTEDNESS OF	(inthemat:pty)
In Re	(inre:pty)
Interested Party	(ip:pty)
Interpleader	(intpl:pty)
Intervenor	(intv:pty)
Intervenor Defendant	(intvd:pty)
Intervenor Plaintiff	(intvp:pty)
Material Witness	(mw:pty)
Mediator	(med:pty)
Movant	(mov:pty)
Non-Party	(nonpty:pty)
Objector	(obj:pty)
Party	(prty:pty)
Petitioner	(pet:pty)
Plaintiff	(pla:pty)
Plaintiff Consolidated	(conpla:pty)
Receiver	(rc:pty)
Respondent	(res:pty)
Special Master	(sm:pty)
Taxpayer	(tax:pty)
ThirdParty Defendant	(3pd:pty)
ThirdParty Plaintiff	(3pp:pty)
Trustee	(trust:pty)

ALIAS TYPE DEFINITION

The Type field on the Alias Information screen is used to identify/describe the type of alias added for a party.

If a party has an alias, once the party has been added, click on the Alias icon in the participant tree. You will get a screen that allows you to search for the alias. Enter the Last/Business Name and click on search. You may get possible matches. If one of the selections matches the alias, then click on it and then click on **[Select Alias]**. If there are no search results or none of the results match the party name, then click **[Create New Alias]**. After either selecting or creating the alias you will get an Alias Information Screen. On this screen you should select the type of alias from the Type drop down menu. The menu options are:

ALIAS TYPE DEFINITION TABLE	
CODE	**DESCRIPTION**
agent	agent of
aka	also known as
aso	as subrogee of
assign	as assignee of
aw	affiliated with
dba	doing business as
fdba	formerly doing business as
fka	formerly known as
idba	individually and doing business as
ita	individually and trading as
itdba	individually and trading and doing business as
ndba	now doing business as
nee	born
nka	now known as
oa	operating as
obo	on behalf of
other	other
rpi	real party in interest
sbm	successor by merger to
siit	successor in interest to
st	successor to
ta	trading as
tdba	trading and doing business as
Unknown	unknown

Example: Michael Jones, also known as Mikey Fingers

Last / Business Name: JONES
First Name: MICHAEL
Middle Name:
Generation:
Title:
Party text:

Last/Business name: FINGERS
First name: MIKEY
Middle name:
Generation:
Type: aka

Example: Joan Watson, doing business as Watson Investigations

Last / Business Name: WATSON
First Name: JOAN
Middle Name:
Generation:
Title:
Party text:

Last/Business name: WATSON INVESTIGATIONS
First name:
Middle name:
Generation:
Type: dba