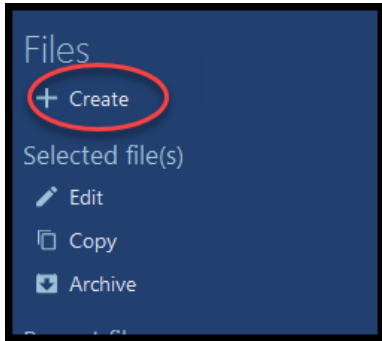




ACL5

FILE OPENING MADE EASY



From the Main Page, click **Create**.

The form is divided into several sections: File Information, Proceeding, File Participants, and Court. Each field is numbered 1 through 12 to correspond with the instructions on the right.

- 1 Enter the **Firm File Number**
- 2 Enter the **File Name**
- 3 Select the **Language Preference**, if enabled
- 4 Select the **Practice Area**
- 5 Select the **File Type**
- 6 Select the **Proceeding Type**
- 7 Select the **Primary Lawyer/Overseeing Lawyer**
- 8 Select any **Additional Firm Members**
- 9 Select the **Level of Court**
- 10 Type or search for the name of the court
- 11 Choose the **Procedural Route**
- 12 Enter the **Court file number** if applicable



For assistance contact:

ACL Support

416.363.1650 x100 / 1.800.340.3234 x100

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Navigate to the **Parties** page to add in the firm's party and the opposing party/parties.

To add Our Client/Contact

Click **Add our party**:

A screenshot of the 'Add Our Party' form. The form has three tabs: 'Primary Information', 'Contact Details', and 'Additional Notes'. The 'Primary Information' tab is active. The form is divided into sections: 'Party Information', 'Personal Details', and 'Additional Information'. Red numbered callouts (1-8) point to specific fields: 1. Party role dropdown; 2. First, Middle, and Last name text boxes; 3. Date of birth calendar and Social insurance/Health card no. text boxes; 4. Additional party information dropdown; 5. Contact Details tab; 6. Additional Notes tab; 7. 'Add party to firm address book' radio buttons; 8. 'Add Another', 'OK', and 'Cancel' buttons.

- 1 Click the drop down to choose the **Party Role** and **Party Type**.
- 2 Enter the **First name**, **Middle name** and **Last name** or the **Organization Name** and **Representative** (as needed) if the party is a corporation.

A close-up screenshot of the 'Organization and Representatives' section of the form. It shows a dropdown menu for 'Party type' set to 'Corporation'. Below it is a text box for 'Organization name' with a red callout '2'. There are also buttons for '+ Add Representative', 'Edit', and 'Delete'. Below this is a table with columns: 'Honorific', 'Name', 'Job Title', 'Tel No.', 'Mobile No.', 'Fax No.', and 'E-mail'.

- 3 Enter the **Date of Birth**, **Social Insurance Number** and **Health Card No.** if needed.
- 4 Add in any **Additional Party Information** (i.e. also known as) if needed. Ensure that the **Name for Style of Proceeding** is correct. Review **Name elsewhere on court documents and letters**.
- 5 Click **Contact Details** to enter in the party's address and phone number if known.
- 6 Click **Additional Notes** to enter notes regarding the party.
- 7 The party will automatically be added to the **Client and Contact Database**. Click **No** if the party should not be added to the database.
- 8 Click **Add Another/OK/Cancel**

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Self represented parties

To add a self represented party, click **Add self-represented party** and repeat steps 1 to 5 above.

Lawyer represented parties

To add a lawyer represented party, click **Add lawyer represented party**.

The screenshot shows a web form titled 'Firm Information'. It has several sections: 'Firm Information' with a 'Firm' search field (1), a 'File reference' field, and a checked 'Include on Service List' box (2); 'Lawyers' with an 'Add Lawyer' button (3) and a table with columns 'Honorific', 'Name', and 'Appears on Court Documents'; and 'Represented Parties' with an 'Add Party' button (4) and a table with columns 'Role' and 'Name'. At the bottom right are 'OK' and 'Cancel' buttons (5).

- 1 Type the name of the firm within the **Firm** field. If the firm is contained in our database, the firm name will appear within the search field. Select the firm. If the firm has not been added to the database, click the **Plus** icon to add in the firm.
- 2 Review the firm's contact details.
- 3 Click Add Lawyer to choose a lawyer from the rolodex, or to add a new lawyer.
- 4 Click Add Party to add in the party/parties the firm represents.
- 5 Click OK once complete.

NOTE: Review the **Order Parties**, **Style of Proceeding**, **Service Details**, and **Backing Sheet** tabs to ensure all information is correct.

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