ADDING A PARTY
Updated 11/17/2022

STEP 1 – Searching for a party prior to adding.

- Before adding a party, a search of the database for the party must be performed. A search may be performed by Social Security Number, Tax Identification Number, Last Name or Business Name.
- Enter the last name or the first few characters of the last name to search. If this is a business filing, enter the first word or significant words of the name to search the database. The entire business name is stored in the **Last/Business name** field.
- Enter the last name and click **[Search]**.

  Search Hints:

  • Enter one field of data for each search.
  • Format Social Security Number or Tax ID with hyphens.
  • Include punctuation. (O'Brien)
  • Try alternate search clues if your first search is not successful.
  • Partial names can be entered.

STEP 2 – Adding a Party.

- If the system finds a match, you can select that name and a "popup" box will give you the rest of the information as it is in the database. Verify that the information is correct before selecting.
- Click the [Next] button.

- If available information is incorrect or if the party is not in the database, proceed to add the party.
- Click **[Add/Create New Party]**.
- Click the **[Next]** button.

STEP 3 – The PARTY INFORMATION screen displays.

- Complete all applicable fields (You must indicate the Role of the party being added. If this step is not done, you will not be able to proceed and a box will appear in the upper portion of your screen to go back to the **Role** tab, Click the [OK] button.)
- To add corporate parent or affiliate information Click the [Corporate parent/affiliate…] and Repeat the search process indicated above.
- Select the **[Submit]** button once all party information has been provided.

STEP 4 – Select the newly added party, which should appear in the selection screen of the event being processed.