



# CaseLines

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*Tips for Unrepresented Litigants*

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# **CASELINES TIPS FOR UNREPRESENTED LITIGANTS**

The Ontario Court of Justice is beginning to use CaseLines for certain case conferences and motions. In 2022, other types of hearings like trials will also begin to use CaseLines.

If you have filed documents with the Family Court office and/or received an invitation from the court to join CaseLines, start by watching the video here:

<https://vimeo.com/654296794>

After you've watched the video, follow the step-by-step instructions below to learn how to:

- Register online with the CaseLines system
- Find Your Case
- Navigate within CaseLines
- Name and Add documents to CaseLines
- Use CaseLines during a hearing

If you have further questions about CaseLines beyond these instructions and you do not have a lawyer see the Contact Centre information at the end of this document.

These tips will give you information about how to use CaseLines for your case at the Ontario Court of Justice.

You should know that CaseLines uses different names for different things. For example, a *Bundle* is basically a folder. *Events* are different hearings before a judge that are a part of your case. An example of an Event is a case conference.

## **STEP 1: FILE YOUR DOCUMENTS WITH THE COURT OFFICE**

Before you start using CaseLines for your hearings, you must file your documents in the court office. You can do this by email, use e-filing ([Family Submissions Online](#))

or file them in person. It is very important to file your documents first before adding them to CaseLines. It is important that you name your documents properly before you file them. Please see *Naming Your Documents Properly* below for information on how to properly name your documents.

## **Naming Your Documents Properly**

**It is very important that you name your documents correctly when you are filing your documents with the court office and adding them in CaseLines.**

Here is how you name and number them. Make sure that you name your documents in the proper order (e.g. document type first, then type of party, then name of party and finally date):

1. Document type (e.g. Application, Answer, etc.),
2. Type of party submitting the document (e.g. Applicant, Respondent),
3. Name of the party submitting the document (including initials if you have the same name as the other party), and
4. Date on which the document was created or signed, in the format DD-MMM-YYYY (e.g. 12-JAN-2021).

Here's an example of the proper name and numbers:

- Case Conference Brief 17A – Applicant - Smith – 01-JAN-2021
- Financial Statement 13 – Applicant - Smith – 01-JAN-2021

## **STEP 2: REGISTER WITH CASELINES**

1. If CaseLines is being used in your case, you will receive an invitation from the court. It will provide you with a link to CaseLines so that you can register and start to use it.
2. When you click on the link in the email invitation, it will take you to a registration screen. On the registration screen, you must provide basic information about yourself and enter your email address and create a username and a password.

3. You will receive a verification email from CaseLines that will be sent to your email address. Click on the link in that email to verify your account.
4. Once you verify your CaseLines account, you will be able to add your documents to CaseLines.
5. Once you have completed your registration, you will need to log in using your username and password. You will be taken to a screen that asks you to acknowledge that you agree to the CaseLines terms and conditions. Click on Acknowledge.
6. If you do not receive an invitation from the court to use CaseLines, the court has decided that your case will not be using CaseLines.

## **STEP 3: FINDING YOUR CASE**

### **Finding Your Case by CaseLines Invitation from The Court**

As mentioned above, the email invitation from the court will take you straight to your case when you click on the link in the email.

### **Finding Your Case by The View Case List Tab**

1. Another way to find your case is to click on the tab on the grey ribbon on the top of the screen that says *View Case List*.
2. On the Case List screen, all the cases that you have been invited to will appear. If you have been invited to more than one case, you will be able to find a specific case by either entering your hearing date, your court file number, or the case name. Once you have entered that information, click on the *Apply Filter* button, and it will take you to your case at the bottom of the screen.
3. Once you find your case on the Case List screen, click *Update Case*.

4. When you click on *Update Case*, you will be taken to a Case Home screen with different tabs at the top of the screen. You will see details of your case on this screen including the case name, the court file number, and details about the next hearing.

## **STEP 4: NAVIGATING THROUGH CASELINES**

### **Case Home Screen**

The Case Home screen has different tabs at the top of the screen. Each tab allows you to do different things. Below is an explanation of each of the tabs.

#### **Index Tab:** A List of All the Documents in The Case

**Index:** you can **see all the documents that have already been added to your case.**

This will include both the Applicants and the Respondents documents. It can also include any endorsement or order that a judge has made in your case.

#### **People Tab:** Inviting People to Your Case

**People:** This tab allows you and the other party **to add other people to your case.**

For example, if you have arranged for duty counsel to be with you at a hearing, you can invite them here.

1. To invite people, click on the Invite New Participant and enter the details of the people who you want to invite to CaseLines.

**Be very careful about who you invite to CaseLines. If you invite people who are not lawyers and they share confidential information about the other party, the judge may order consequences, including costs.**

2. On the screen, you can enter an Expiry Date – a date for when the person you invited will no longer have access to your case.
3. Underneath the information that you have entered for the person who you are inviting, you will see a list titled, Bundle Access. Bundle Access

is the folder for the different events that you will be attending. For example, if you have a case conference, select case conference.

4. Under the Bundle Access is a list called Access Permissions. With this list, you can decide whether that person can view your documents, add documents, or perform other functions. Anyone who is invited by you to your case in CaseLines will only have access to the documents that you have access to.
5. Under Emails, you can click on *Send Advisory Email* to allow the person who you invited to receive emails notifying them about updates to your case.
6. Once you have done everything on this screen that you want to do, go to the bottom middle of the screen, and click *Invite*.

## **STEP 5: ADDING AND REVIEWING DOCUMENTS**

### **Adding Your Documents**

**Sections Tab:** This tab allows you **to add documents** into CaseLines.

1. Click on *Sections* on the grey tab at the top of the page. Once you are on the *Sections* screen, you will automatically be taken to the event that you are invited to attend. If you are attending a case conference, the screen will read Case Conference under the word, *Sections*.
2. Under the Case Conference heading (or event that you will be taking part in), you will see *Applicant Documents* and *Respondent Documents* as well as other headings.
3. If you are the Applicant, you will add your documents to *Applicant Documents*. If you are the Respondent, choose *Respondent Documents*.
4. On the right side of *Applicant Documents* or *Respondent Documents*, there is a button that says, *Upload Files*. This will allow you to add your documents.

5. Once you click on *Upload Files*, you will be taken to a screen that has your case name on it. You have two (2) options on this screen: *Upload a File* or *Upload Bookmarked PDF into a Single Document*.
6. *Upload a File* allows you to add a single file to CaseLines.
7. *Upload Bookmarked PDF into a Single Document* allows you to add or upload a PDF that is made up of a lot of your different documents. CaseLines will split the PDF into separate documents in CaseLines.
8. At the bottom of this screen, you will see *Add Files* in the box under *Select Files*. Click on *Add Files*. Select the documents that you want to add to CaseLines from your computer. After you have selected your documents, click of *Start Upload*. Your documents will now be added or uploaded into CaseLines.
9. **Upload tab:** There is second way to add or upload documents to CaseLines. At the top of the screen, click on the *Upload* tab. It, too, will take you to the above screen to start adding documents. Follow the instructions numbered 1 to 8 above under *Adding Your Documents*.

## Reviewing the Documents

1. You should look at all the documents that have been added for your hearing. This is called reviewing the evidence.
2. To do this, click on the *View Case List* option on the ribbon at the top of the screen.
3. Once again, you will see your case name on the screen. There are two buttons on the bottom right side of the CaseLines screen. One says, *Review Evidence* and the other one says, *Update Case*. If you click on *Review Evidence*, it will take you to all the documents that have been filed so that you can review them.
4. There is another way to review your evidence. If you click on *Update Case*, it will take you to the screen with tabs on the toolbar at the top of the *Update Case* screen. Once you are on that screen, you will see a *Review* tab on the top left corner of the screen. This tab will also take you to the documents for you to review your evidence.
5. Once you click on one of these two (2) tabs, you will be taken to another screen that lists all the documents added to CaseLines for your case.



6. On the left-hand side, you will see all the documents. There are different headings, including *Applicant Documents*, *Respondent Documents* and *Endorsements, Orders and Judgments*.
7. Once you click on one of the headings and then click on a document, you can see the document that you want to read in the middle of the screen. To navigate through the documents, you can click on the documents that you want to see.
8. On the far-right side of the screen, there is a *Notes* section. See the *Notes* section below for more information on how to use *Notes*.
9. You can navigate the *Review* screen by using the grey toolbar near the top of the screen. The toolbar has different options including, *Home*, *Find*, *View*, *Present*, *Notes*, *Download* and *People*. When you click on one of those tabs, you will see different options under each of the tabs. There are more explanations on what those tabs do below.

## **Find Button:** Finding Specific Documents or Pages

1. Click on the *Find* button on the grey toolbar near the top of the screen beside the *Home* button to find documents or to find specific pages in documents. There are different options available under the *Find* button.
2. On the top right-hand corner of the document in the middle of your screen, you will see *Master* and *Current* with letters and numbers beside them. These are in red on the top right side of your document.
3. *Current* will tell you the current page you are looking at, whether it is an Applicant or Respondent document, and its page number.
4. *Master* has a somewhat similar although different function. CaseLines organizes all the documents added to the case into a Master bundle or folder. *Master* may have a different letter and number attached to it than *Current*. The letters are either A (Applicant), B (Respondent), B-2 (Other Respondent, if there is one), C (Joint Documents or Draft Orders), etc. The numbers are the page numbers.
5. The last button on the grey toolbar near the top of the page is a *Find Page* button. This will allow you to find a specific page in a document. Click on the button and enter the letter and the number of the page that you want to go to. You must enter both the letter and the number.

## Viewing Two Documents on The Screen at The Same Time

1. If you want to see two (2) documents on the screen at the same time, you can do this by clicking on the little picture that looks like two (2) overlapping pages on the right hand side of the screen, above the document on the blue bar.
2. If you click on the different documents on the left-hand side of the screen, you can choose which two (2) documents you want to see on the screen at the same time. To change the documents, there is a box at the right-hand top of the document that you click to move to other documents.
3. Also, on the left-hand side and the top of each of the documents, there is a stick and ball picture. This will allow you to make each of the screens bigger or smaller when you are viewing two (2) screens at the same time.
4. To close the second document, just click on the "X" on the top right-hand side of the document.

## Search Button: Searching for Documents by Their Name or Searching for A Word or Phrase

1. *Search Case* is another button under the *Find* tab. Search allows you to search for specific documents by title or search for a word or phrase.
2. It is best to do this search when you have two (2) documents on the screen at the same time. This will allow the search screen to be displayed on the left-hand side of the screen.
3. You are given different options to search for titles, words, or phrases. You can search within the current document on the screen by clicking on the red button, *Search Current Document*.
4. Or, you can search for document titles, words, or phrases within a *Section* by clicking on *Search Current Section*. This will allow you to search within all the Applicants, Respondents, or other sections. Once you select the options, click on *Search*. The document will show up on the right-hand side of the screen.

## View Tab: Zooming in Or Out

1. The *View* tab is on the toolbar at the top of the page beside the *Find* tab.
2. Under the *View* tab, you will see different options, including being able to zoom in and out of a document.
3. You can also *Pan and Zoom*. This will open the document in a brand-new window to allow you to move the document and then zoom into the document to see more detail within the document. Click on the *Pan and Zoom* button and use your mouse wheel to enlarge details within the document.
4. The *Meta Data* button allows you to see time stamps and location details for certain photographs.

## **STEP 6: USING CASELINES DURING A HEARING**

You will be using CaseLines during your court hearing. Each of the tabs and the buttons under *Present Tab* do different things.

### **Present Tab**

This tab is for presenting your documents during a hearing to the other party and the judge.

### **Start Presentation Button**

1. The *Start Presentation* button allows other people including the other party and the judge to see your screen.
2. The other party and the judge will only see the document in the middle of the screen and not your notes or the list of documents on the right-hand side of the screen. This is important if, for example, you want to keep your *Notes* private. When you click on *Start Presentation*, CaseLines outlines the document that you want to share with a red line. The document within the red lines is the only thing that others will see.
3. When you use *Start Presentation*, you will be able to *Pause* or *Stop* the *Presentation* by clicking on the buttons at the top of the document.

4. You will also be able to see who is following your presentation.
5. To switch to another document when you are presenting your documents, click on *Pause* and switch to a document that is in the list on the left- hand side of your screen. Click on *Resume* to go back to presenting your documents.
6. The *Auto Follow* button under the *Present* tab can be turned on so that you automatically follow anyone else who is presenting their documents.

### **Find Tab:** Directing Other People to A Page

Under the *Find* tab is a button that states *Direct Others to Page*. This will allow you to direct people to a specific page during a hearing. When you click on this button, a pop-up screen will ask you if you want people to see a specific page. Click okay or cancel. Once you do that, everyone will go to the page that you want them to see.

### **Notes Tab:** Making Notes in The Documents

1. The *Notes* tab is next to the *Present* tab on the toolbar at the top of the page.
2. There are three (3) types of Notes that you can create. There is a Case note that is a note for the entire case. To create one of those, click on the *Add a Case Note* button. A pop-up screen appears for you to enter the note.
3. **Privacy Options:** For each note, you have three (3) privacy options: *Private Note*, *Share Group Note*, and *Widely Shared Note*. The *Private Note* will be seen only by you. The *Share Group Note* is for you to share with your lawyer or another person. The *Widely Share Note* is for anyone with access to your case, including the other party and the judge. Decide which privacy option you want, write your note, and then click on *Save*. Once you *Save* your note, it appears on the right-hand side of the screen. You can edit or remove the note within the note on the right-hand side of the screen.

4. **Colour Button:** Your notes can be in different colours. Use this button if you want to make a note in a specific colour to distinguish it from your other notes.
5. **Add a Page Note:** You can also create a page note by the *Add a Page Note* button at the top of the screen. This would be for you to make a note on a specific part of a page in your document. When you click on this button, other options appear. You can draw a box around specific text on a document with the *Draw a Box* button by clicking and dragging the text. You can then write a note about the text that is within the box. You can also highlight text within a page and write a note about the highlighted text. With the *Pen* button, you can draw on your documents to strike things out or point to something.

## Download Tab

1. This tab lets you download or add documents from CaseLines to your personal computer. There are four (4) options in the Download tab: *Download Document*, *Download Bundle*, *Download Notes* and *Download E-Bridge PDF*.
2. You can download the document that you are currently viewing on your screen by clicking on the *Download Document* button.
3. You can also download all the documents in a bundle or folder by clicking on the *Download Bundle* button.
4. To download your notes, click on *Download Notes*.
5. You can also download a document with a link to your case by clicking on the *Download E-bridge PDF*. This doesn't add the documents themselves but rather provides you with a link to the documents. In addition, this feature will include a support link.

## People Tab

The *People* tab is another way for you to invite others to your case in CaseLines.

## Support Tab

If at any point you need support using CaseLines, you can click on the *Support* tab. This tab has videos, guides, and information about using CaseLines.

If you have general questions about CaseLines and **you do not have a lawyer**, you may email the Ministry of the Attorney General's Court Services Division Contact Centre at [info.CaseLines@ontario.ca](mailto:info.CaseLines@ontario.ca) or call toll free at 1-800-980-4962. The contact center is available Monday through Friday from 8:30am to 5:00pm (ET) excluding holidays.