



## Introduction to CaseLines: Through the Lens of a Litigator – FOLA presentation May 25/26, 2021

[SCJ Notice to the profession](#)

[SCJ FAQ about CaseLines](#)

[CaseLines Hearings – Tips for Counsel and Self-represented Parties](#)

### FAQ

#### **Where can we get training to hyperlinking?**

1. OBA is offering specialized training for which you can register at:  
[OBA.org - OBA Supporting the Ontario Bar with Specialized CaseLines Training](#)
2. Thomson Reuters's Customer Learning Consultants can also provide training. Please contact [betty.montoni@thomsonreuters.com](mailto:betty.montoni@thomsonreuters.com)

#### **Once a document is uploaded is it accessible by all?**

Yes, the document is accessible by all users who have access to the bundle in which the document is uploaded. There is the ability to 'exclude' accessibility to a document, but that option is not available through the permissions set up withing the Court's version of CaseLines.

#### **What prompts the court to invite you to participate/when will we receive an invitation from the court?**

The creation of a case within CaseLines is prompted by the following:

- a. filing of your record in the online filing portal
- b. a case or pre-trial conference
- c. a request by counsel

#### **How do I know whether my case is in CaseLines? How do I keep track?**

You will receive an email notification from the court advising that you are invited to the case. The invite will contain a link to the case, as well as a link to a list of cases that you are invited to.

### **Example of email invite:**

For the attention of [you@yourfirm.com](mailto:you@yourfirm.com)

You have been given access to an electronic bundle on CaseLines, a secure third party provider, by Ms Jessica Brown.

Case name: Magenta v Turquoise  
Your role: Court Manager  
Reference: CV 20-29480

Please click here to review the evidence for this case:

<https://nam02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fontariocourts.caselines.com%2F%2F%2F91c&data=04%7C01%7Cjessica.brown%40thomsonreuters.com%7C6b88c4ab3208439e9e7008d88569498d%7C62ccb8646a1a4b5d8e1c397dec1a8258%7C0%7C0%7C637406034540342112%7CUnknown%7CTWFpbGZsb3d8eYjWljoImC4wLjAwMDAILCjoiV2luMzIlCjBtIl6k1haWwILCjXVCI6Mn0%3D%7C1000&sd=6Tj%2FSFHUYCJzcYhZz8aJQfUpMFKDi1RDGxb0BOWiWU%3D&reserved=0>

(Click the Case Tab and Update Bundle to access the full case details)

Please click the following link to view all cases that you have been invited to:

<https://nam02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fontariocourts.caselines.com%2F%2F%2Fc10&data=04%7C01%7Cjessica.brown%40thomsonreuters.com%7C6b88c4ab3208439e9e7008d88569498d%7C62ccb8646a1a4b5d8e1c397dec1a8258%7C0%7C0%7C637406034540342112%7CUnknown%7CTWFpbGZsb3d8eYjWljoImC4wLjAwMDAILCjoiV2luMzIlCjBtIl6k1haWwILCjXVCI6Mn0%3D%7C1000&sd=0g2UNkqfvKSNiW3mX254wG5opUk4GiRgYjnhulH2LzO%3D&reserved=0>

Help documentation and Frequently Asked Questions can be found by clicking on the following link:

<https://nam02.safelinks.protection.outlook.com/?url=http%3A%2F%2Fsupport.caselines.com%2Fsupport%2Fsolutions&data=04%7C01%7Cjessica.brown%40thomsonreuters.com%7C6b88c4ab3208439e9e7008d88569498d%7C62ccb8646a1a4b5d8e1c397dec1a8258%7C0%7C0%7C637406034540342112%7CUnknown%7CTWFpbGZsb3d8eYjWljoImC4wLjAwMDAILCjoiV2luMzIlCjBtIl6k1haWwILCjXVCI6Mn0%3D%7C1000&sd=mFr%2F%2B6DiMqg7IRYgcbYoSxorVJeUmbKz5XcM73Btdg%3D&reserved=0>

Once you log into [ontario.courts.caselines.com](https://ontario.courts.caselines.com) you will be able to see a list of all the cases to which you have access.

### **Can we expect that CaseLines will add the ability to import bookmarks in .pdf documents, and if so, when?**

CaseLines does import bookmarks in accordance with the following rules:

A PDF with two levels of bookmarking:

- Level 1 bookmarks are used to create sections in the bundle.
- Level 2 bookmarks are used to find the start of individual documents and used for the names of those documents.
- Level 3 and level 4 bookmarks are ignored.

However, this option is not available in the Court's version of CaseLines, as this option is not accessible to invited parties.

In regards, to the Court's version of CaseLines:

First level bookmarked PDFs can be uploaded. The bookmarks identify where the PDF is to be separated into separate documents in accordance with the Ontario Court's Notice to the

Profession. This pertains to the uploading of various types of records such as a Motion Record. If the document is a single document with bookmarked PDFs, the bookmarks will not be imported. It is recommended that you create hyperlinks within the PDF if you do not want the PDF document to be separated by selecting the Upload Filing Book option.

### **Should support staff also register on CaseLines or just the lawyer**

All members within your practice who are working on the case should be invited to the case. Typically, support staff are responsible for uploading documents so they would indeed require an invitation to the case, as well as provided access to the specific sub-bundle to where the documents are to be uploaded.

### **If you change email addresses will you need to re-register with CaseLines? What happens if you get conflicted out of a file?**

You would have to register your new email address and verify the registration. Note that any prior cases in which you have had access will not automatically change your email address. If you are conflicted out of a case, then someone in your firm who has access to that case should ensure that you are not invited to that conflicted case.

### **As a Criminal Defence lawyer, I don't want the Crown or the Judge to know that I am presenting evidence until the moment I wish to present it. Doesn't this platform prevent me from doing that?**

CaseLines does have a feature that withholds the document from view until “the last minute” but that option is not permissioned to parties in the Court’s version.

Please contact [info.CaseLines@ontario.ca](mailto:info.CaseLines@ontario.ca) or call 1-800-980-4962 for this specific question.

For further context, the Court recommends the following:

While CaseLines can be used for most hearings, some *documents* should not be uploaded onto CaseLines. Unless specifically directed by the court to do otherwise, Crown and defence counsel will not upload the following documents into CaseLines<sup>[1]</sup>:

- A sealed document
- A document for which a sealing order is sought
- A privileged document, or a document where privilege is being asserted
- Any other document where counsel have concerns about uploading

Presently, for criminal matters CaseLines will only be used where there is counsel, and access will only be available to lawyers and their designated staff. Direct access to CL will not be

available to accused persons or witnesses regardless if they are represented by counsel. Criminal lawyers must not provide access to their client(s) and must arrange to share necessary documents with the client(s) using other appropriate means.

<https://www.ontariocourts.ca/scj/notices-and-orders-covid-19/toronto-criminal-caselines/>

**If the documents are bookmarked and hyperlinked in Adobe, will this remain in that format when downloaded into CaseLines?**

Within the Court's CaseLines version, bookmarks are recognized using the "Upload File Book" option when the document is uploaded. Any first level bookmark will be treated as an indicator for CaseLines to separate the bookmarked PDF based on that bookmark, resulting in separate documents which can then be easily accessed and reviewed in the Index.

Hyperlinks that are between two pages within the same documents, as well as hyperlinks to URLs will be maintained. Hyperlinks that are between two separate documents will not be maintained and will have to be created within CaseLines.

(Also refer to the above question re: **import bookmarks**)

**Any chance we can have the format for file names changed so that it's YYYY-MM-DD Title of Doc, so we can organize the files in windows explorer chronologically?**

CaseLines accepts the following date types:

DD MM YYYY	YYYY MM DD	MM DD YYYY
DD.MM.YYYY	YYYY.MM.DD	MM.DD.YYYY
DD-MM-YYYY	YYYY-MM-DD	MM-DD-YYYY
DD/MM/YYYY	YYYY/MM/DD	MM/DD/YYYY
DD-MMM-YYYY		

However, the Court requests that the date format be DD-MMM-YYYY

Link: Use the Court's [standard document naming protocol](#)

**Are we required to invite opposing counsel or just our team?**

You are not required to invite opposing counsel.

**I have seen the Zoom link for the hearing sometimes appearing on CaseLines with both conference ID and password (together with the link), and sometimes appearing without both (just the link). Any comments.**

Please contact Please contact [info.CaseLines@ontario.ca](mailto:info.CaseLines@ontario.ca) or call 1-800-980-4962 for this specific question