

Inviting Parties

Q. Could you address best practices for inviting clients into CaseLines?

Refer to the Courts' Tips for Counsel and Self-Represented Parties ([Tip#3](#)).

Q. The email notification is not always being received by counsel.

Check your spam or junk folder. Once registered, when you log on to CaseLines you will see a list of cases you are invited to on the [View Case List](#) screen. If you do not see your case/matter listed, contact the court

Q. Are invitations only to be limited to professionals/self-represented litigants? Can I invite my client, the litigant, at this time?

You can invite your client in civil and family matters provided they are a party to the matter.

Q. Can you forward the email invite/link to other staff in the office?

Yes, you should invite your support staff to the case. They will have to be registered for CaseLines in order to view the case.

Q. Is there a way to have your support staff automatically invited to your matters on CaseLines?

Not at this time.

Q. Can you remove a person from CaseLines? I have a matter with former counsel still granted access to CaseLines and they have asked me to remove them, so they do not receive updates.

You cannot remove people from a case. You can however set an expiry date at the time that do you invite the party to a case such that the party will no longer be able to access the case after the expiry date. In this case you will have to contact the court to remove them.

Q. If your hearing is virtual, is the link to the hearing accessible through CaseLines or is it a separate link sent from the court?

The link is accessible within the case. You can access the link by selecting the case, select [Update Case](#) and click on the [Case Home](#) tab. It is also accessible from the Home Tab of the Review Screen. You can also access the link by selecting the [View Hearings](#) tab when you log into CaseLines.

Q. Can you get a new account with CaseLines when you change firms and have a new email address?

Yes. You will need to register again with your new email address.

Q. Can invited people also invite other users?

Lawyers can provide other professionals access to their cases in CaseLines. If you are a self-represented litigant and would like to grant another person access to your CaseLines file, you will need to ask the court to grant the access. In turn, those invitees can invite others to the case.

Q. When do you invite the other counsel to view your bundle? I thought that you could automatically see the other party's bundle.

You do not have to invite opposing counsel - they will be able to see your documents and you will see theirs.

Notes**Q. When you modify a document in CaseLines and mark it up with notations or drawing, can you save that document separately in CaseLines, to create a new exhibit document? Can I share the note when I am in a hearing?**

At present, the document cannot be saved with markups. Notes can however be shared with everyone or with a sub-group called a Share Group Note. Notes can also be downloaded.

Q. What will happen to notes or annotations on PDF documents that you upload to CaseLines? Will they transfer into the notes viewer when reviewing evidence?

Notes created on PDFs will not be viewable in CaseLines. It is recommended that you annotate in CaseLines.

Q. Are the notes completely confidential or can other people on the file see our notes?

The notes default to private and no one else can see them - unless you choose otherwise. For detailed instructions and options for notes, please visit: https://answers.legalprof.thomsonreuters.com/casecenter_canada/outside-counsel

Q. If I highlight or comment directly on a document from the "Notes" section, are my highlights and comments viewed by others?

Markups will only be viewable by those that you have shared the note with. During a virtual hearing you would not share your screen so the markups would not be viewable. There is also an option to 'turn off' Show Notes.

Court Guidelines**Q. When will CaseLines and portal filing be merged?**

This is still being determined and no date has been considered.

Q. Does the court assign the section to which a party should upload? For example, how do I know who Respondent/Defendant 2" is?

The court does not assign sections for parties. You can pick the section based on the party you are representing, or, if you are self-represented, based on whether you are plaintiff or defendant, and then going forward you will know based on which section you've used previously. Rule of thumb is that you upload to the corresponding section based on the order the party is named in the style of cause. Ensure that other parties have not uploaded to this section prior to you uploading your documents.

Q. Are we able to set up bundles? I've had cases where the appropriate bundle has not been set up and parties are left not knowing where to upload documents.

Case structure, including creation of new bundles or sections, are administered by the court. You would have to contact the court to request changes to the structure. The case creator/administrator should be named in your case invite email.

Q. Can't the court automate the filename requirements? This is not efficient when law firms have their own document management systems.

There is no automation available.

Q. Can you please explain how do we file a document before we upload it?

Visit the JSO (Judicial Submissions Online) site at: <https://www.ontario.ca/page/file-civil-claim-online>

Q. Would an added Defendant by Counterclaim be added to Defendants documents or Third-Party documents?

This would need to be confirmed by the Courts. But as Defendants by Counterclaim and Third Parties are distinct, documents for a Defendant by Counterclaim would probably go into one of the Defendant sections (and not into the Third-Party section).

Q. Where a case goes to trial, is the settlement conference bundle automatically deleted or blocked? There are concerns settlement discussions may be available at trial.

Only individuals with permanent access to the settlement documents will continue to have access to the bundle – i.e. those that would have been served the material through other means. Nothing is deleted or blocked.

Q. If you are invited, and you are mid-way through the case (such as at a Settlement Conference stage) and CaseLines is blank as to documents, do you have to upload the pleadings? Or does the Court do that? And, do you have to upload any earlier documents (such as older financial documents)?

I would recommend contacting the court for clarification on this matter if it is not already outlined in their guidelines. Typically, you would upload any and all documents (including pleadings) that you will be relying on at the hearing.

Q. What happens if counsel doesn't file materials, but uploads to CaseLines only?

Parties must file with JSO first. CaseLines does not replace filing of your materials in the JSO portal

Q. Do you have to upload pleadings if you are invited into CaseLines half-way through?

Yes.

Uploading Documents

Q. Is the date on the document the date of the hearing or the date of the document?

It would be the date of the document. However, the date must be part of the filename. If there is no date in the filename, the date the document is uploaded will become the date of the document

Q. If uploading by way of PDF Bookmarks, do the bookmarks have to be under the same naming convention e.g., Financial Statement Form 13 - Respondent - NAME - 12-NOV-2021?

Yes, follow the same naming convention. For more information on the naming convention please refer to Tip #4 on the Court's site at:

https://www.ontariocourts.ca/scj/notices-and-orders-covid-19/supplementary-notice-september-2-2020/caseline-tips/#Tip_3_Invite_other_lawyers_and_legal_assistants

Q. What is a "bookmarked PDF"?

Think of a bookmark as tabs placed in the PDF document allowing for easier navigation.

Q. If you upload the wrong version of a case conference for example, how long do I have to remove before it 'locks' me from doing so?

The court does not freeze the bundle. Note that parties absolutely must file any updated versions of a document before uploading to CaseLines.

Q. What is the E-Bridge Link document and give examples how to use.

An E-bridge document is a single page pdf with various links, including a link to the Review Screen of the case, your Case List, and various help resources. This document is of value to save onto your document management system or the case file in your practice for ease of access to the corresponding CaseLines case. For additional information on ebridge please visit: <https://answers.legalprof.thomsonreuters.com/casecenter?search=ebridge>

Q. Should I load the other parties' documents when they fail to load them?

No – Uploading is the responsibility of each party.

Q. Can you upload documents in WORD format, and if so, do they maintain the same format or are they converted? Is there any benefit to uploading WORD documents versus PDF documents, for copying and pasting or searching functions?

Documents can be uploaded in their native format (such as WORD). CaseLines will create a PDF rendition of each document type except for Excel documents. The PDF version will be viewable by you and other invited parties. The native version will not be viewable, as it will be stored in the Master Bundle to which invited parties do not have access.

Q. Is there a way to upload documents into a section that is not visible to other parties, for example if you wish to bring it out on cross-examination to impeach a witness?

This feature is available in CaseLines but not permitted by the Courts. You can reach out to the Court to discuss options.

Q. Can you redact documents in CaseLines

Yes, you can, but that feature is permitted to those that have access to the Master bundle. The court does not provide access to the Master bundle.

Q. Where should the Index we create be uploaded in CaseLines?

Upload the Index to the beginning of your section. You will want to hyperlink the Index to the documents in CaseLines so that the documents can be easily accessed.

Q. Is there a maximum length for individual documents - for instance self reps often upload very long documents with many attachments. or is there a maximum size for an entire bundle?

A 500-page limit is the recommendation - otherwise the review of the document within the Review screen could slow down when you present evidence. Refer to the Courts' Tips for Counsel and Self-Represented Parties ([Tip#5](#))

Q. Do bookmarks and hyperlinks work when uploading as a single PDF file?

Bookmarks are not maintained. Hyperlinks between two pages, as well as a hyperlink to a URL will be maintained.

- Q. I have a trial book of documents to upload with 160 documents. Should each document be bookmarked so they upload individually, or should they be linked instead?**

The Trial Book should be bookmarked and uploaded individually.

Hyperlinks

- Q. What does it mean that “hyperlinks that point to an external website also continue to work in CaseLines if left in their full address format”? Does this mean they must be displayed as full links or that text can be hyperlinked in documents using their full URLs?**

The URL does not have to be displayed as a full address. The text can be hyperlinked using the full URLs.

- Q. How can I swap out the hyperlink in my factum to hyperlink to a location to one of my separate documents within CaseLines?**

Refer to Thomson Reuters’ Learning Site: [How to Add Hyperlinks](#)

- Q. Can you create hyperlinks to other documents in the bundle? For example, as the respondent, can I create a hyperlink to a paragraph in the applicant's factum?**

There are a couple tips for creating hyperlinks between two documents in CaseLines. Copy the link from the page of the document in CaseLines and add it to your document before upload to CaseLines.

For more details on hyperlinking visit: [How to Add Hyperlinks](#)

- Q. Can I request a demo on how to enter hyperlinks to exhibits on an Affidavit**

Reach out to Thomson Reuters by contacting betty.montoni@thomsonreuters.com

- Q. I have several documents that have hyperlinks. I uploaded them. All of them were accepted, the links remained except for one.**

If the hyperlink is between two different documents, then the hyperlink will not be maintained when uploaded to CaseLines. The hyperlink will have to be recreated.

- Q. Is there a way to print off a document from CaseLines. Like documents uploaded by the other side.**

All documents can be downloaded to a PDF and can then in turn can be printed.

For more information visit: [How to Download Documents](#)

Review Screen

Q. When you are splitting a screen to see different documents beside one another, are both screens shared, if you are presenting?

When presenting, only the document on the left will be shared providing you are using the Present feature of CaseLines and not sharing your screen as you would in a virtual meeting.

Q. Can you have two documents up on the screen simultaneously?

Yes, by using the Dual Pane feature. For more information visit: [How to view two files side by side.](#)

Q. If your lawyer is working from home and wants to print off a file from the other side that they have uploaded to CaseLines, how would they do this? Can you?

From the Review Screen - click on the Download menu ribbon and there you can choose to download a single document or the content of an entire bundle. For more information visit: [How to Download a Document](#)

Q. How do we deal with documents we wish to rely on at trial but may not yet have been admitted into evidence?

All documents must be uploaded five days before the CaseLines hearing and must be submitted prior to that to JSO (efiling portal). If documents have not been admitted into evidence at the time of trial and are to be admitted during trial, then you can upload the document during the trial but with Judge's approval.

Q. Can I put up a document for all to see, or do I have to invite another party to look at it?

Documents are viewable by all parties that have been invited to the case and who have access to the document. You can share a document with a party that is not invited, however that would require you sharing your screen which is not recommended, as you could erroneously share your notes. You will want to ensure that your notes are hidden from view. A recent enhancement of CaseLines provides the ability to invite a witness to the case through a portal that provides a viewing window only, which is managed by you.

Q. Is there a quick way to go to a specific page in CaseLines?

Refer to the Courts' Tips for Counsel and Self-Represented Parties. ([Tip#10](#))

Q. Will witnesses at a hearing be given access to CaseLines for document references?

Typically witnesses can be invited to CaseLines with limited access and permissions. This applies to civil matters and some family but never criminal matters

There is a new witness view of CaseLines. Information on how to use this can be found at: [How to Invite and admit a witness](#) However at the time of this webinar, the Courts are not using this feature.

Training

Q. Is there a demo of CaseLines that we can use to familiarize ourselves with the system before we get an official invite?

You can access CaseLines demos on the Superior Court of Justice Website

CaseLines Demonstrations

- [Civil \(1 hour\)](#)
- [Family \(1 hour\)](#)
- [Criminal \(1 hour\)](#)

Additional resources are available at Thomson Reuters' [Learning Site](#)

Q. How can I familiarize myself with CaseLines before getting invited by the courts?

You can arrange for training by contacting Thomson Reuters: betty.montoni@thomsonreuters.com

Q. How can I get training to use CaseLines without having to pay?

There is quite a bit of good training material on the [Court website](#). Additional resources are available at Thomson Reuters' [Learning Site](#)

Q. Is there somewhere the lawyer and support staff can go to practice using CaseLines prior to us getting an invitation regarding our upcoming proceeding?

There is presently not a place to practice with CaseLines. It is best to refer to the user guides and videos on the Canada training resources site at: [Learning Site](#)

You can also contact ryan.snushall@thomsonreuters.com who can provide you with additional options.

General

Q. I am a retired lawyer and long-time mediator. Can you give an example of how a mediator would be involved in a mandatory mediation via CaseLines? What would the process be?

CaseLines can be used for any type of hearing or at a virtual meeting where documents and evidence are being presented/shared.

Q. The suggestion of using CaseLines outside court i.e., for discovery, how do we do that if the case has not yet been set up by court in CaseLines?

You can use CaseLines on your own instance and then transfer cases directly to the Court's instance after you have been invited to a case using CaseLines.

Q. Is there a way to get tech support during a hearing? A number you can call.

CaseLines Support: PHONE: +1 800 290-9378

Q. Can more than 1 person from a firm be logged into CaseLines at the same time?

Yes - absolutely.

Q. Could you give an example of how to argue a Motion with CaseLines?

Please see the learning material on registering, uploading, presenting evidence provided on the Court's site for lawyers at: <https://www.ontariocourts.ca/scj/notices-and-orders-covid-19/supplementary-notice-september-2-2020/caseline-tips/>