

CaseLines Hearings – Tips for the Bar

You’ve received an email from CaseLines advising you to upload documents for your upcoming hearing into CaseLines. What now? Below are tips to help you work with CaseLines.

Need more information? View a CaseLines tutorial here: [Welcome to CaseLines](#). For technical instructions, login to CaseLines and click “Support” or see FAQs [here](#).

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Pre-Hearing Uploading and Preparation

Tip 1 – Register and bookmark CaseLines (Ontario)

If you haven't done so already, the first step will be to register as a CaseLines user and bookmark the CaseLines (Ontario) website. Click on the link in the email directing you to CaseLines and fill in the required information on the registration page. You can also register in advance by visiting: <https://ontariocourts.caselines.com/> and clicking on "Register" at the top right corner. You may also want to bookmark this website so that you return to the Ontario version of CaseLines and not another jurisdiction.

Tip 2 – File first, upload second

After you have filed your documents with the court, through Justice Submissions Online or another approved means, and those filings have been accepted by the court, upload your documents into CaseLines. This should be done at least 5 days prior to your court date (or later IF permitted by the applicable rules). Criminal documents for pre-trial motions in Toronto are to be uploaded the Thursday prior to the week the motion is set to be argued.

Important - Uploading to CaseLines is mandatory so that the judicial official has access to your material when preparing for the event. Material that is not uploaded into CaseLines will likely not be reviewed in advance.

Tip 3 – Invite other lawyers and legal assistants

Lawyers can provide other professionals access to their cases in CaseLines. You can do so by locating the case (found on your View Case List screen) and selecting Update Case. Next, click on the People tab found in the case file and then on Invite New Participant. Enter the participant's email address and select the bundles you would like to provide them access to (e.g. the event and Orders and Endorsements bundles). Once you click Invite, an automated CaseLines email will be sent to the person containing a link to the case.

View a short how-to video [here](#).

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.

Tip 4 – Name and number your documents

To upload into CaseLines, you must save your document using the following file naming protocol:

- Document type (including the form number in family cases),

- Type of party submitting the document,
- Name of the party submitting the document (including initials if the name is not unique to the case), and
- Date on which the document was created or signed, in the format DD-MMM-YYYY (e.g. 12-JAN-2021).

Document names that do not follow this protocol will not upload correctly or be accepted.

You can control the order in which your documents appear, therefore please add a number at the beginning of the document name (i.e. **1. Factum – Respondent Smith – 01-JAN-2021**). If you upload a new document later (e.g. during the hearing), you will want to add it at the end of your list so that it does not change the order and page numbers that have been allocated to documents that have already been uploaded. If your documents are not appearing numerically, please contact staff so that they can change the settings in your file.

Below is an example of how a respondent in an appeal may name their documents in CaseLines:

1. Factum – Respondent Smith – 01-JAN-2021
2. Responding Record -- Respondent Smith – 01-JAN-2021
3. Oral Argument Compendium – Respondent Smith – 01-JAN-2021
4. Transcript Brief – Respondent Smith – 01-JAN-2021
5. Exhibit Book – Respondent Smith – 01-JAN-2021
6. Financial Statement 13.1 – Applicant Smith – 01-JAN-2021

Tip 5 – Upload documents individually to the appropriate event bundle

After accessing your case in CaseLines, you will see a list of event bundles (subfolders) in your case. Before each event, staff will label and provide you with access to the bundle for the event. For example, if a settlement conference has been scheduled, staff will provide you with access to the settlement conference bundle. You would also have access to previous event bundles as well as the settlement conference bundles. Upload your documents into the correct event bundle. This makes it easy for the judicial official to review the right documents before the upcoming event.

To upload documents, click on the “Sections” tab in the case file, find your designated section and select “Update Documents”.

Generally speaking, you should **upload each document separately**. This applies to all exhibits at trial or documents that are contained in a motion record. Exhibits to affidavits should, however, be included and uploaded with the affidavit, with hyperlinks to the exhibits for ease of reference. This will ensure that all of your documents are organized and easily accessible for your hearing. Each document will be listed in the table of contents found on the left-hand of the “Review” screen.

Tip 6 – Use hyperlinks!

Hyperlinks that you have included within a single Word or PDF document will still be available after the document has been uploaded to CaseLines. We encourage the use of hyperlinks, particularly with lengthy documents.

If you want to hyperlink two separate documents, you can do so using the CaseLines hyperlink feature. Click on the “Index” tab in the case file, find the document you wish to hyperlink and click on “View”. While in the View screen, click on the hyperlink button to add where needed.

Tip 7 – Create an index of key documents listing CaseLines-generated document and page numbers

After uploading your documents into CaseLines, you may want to create a document containing an index of the documents that you will be relying on at the hearing along with the CaseLines-generated document and page numbers (e.g. A13). If you upload this document onto CaseLines in advance of the hearing, the judicial official can refer to it when preparing for the event.

Hearing Tips

Tip 8 – View a list of upcoming events and access video conference links

You can see your upcoming events in CaseLines by clicking “View Hearings” at the top of the screen. This page provides a list of your upcoming hearings and will include the Zoom coordinates for virtual hearings.

If you want to share the Zoom coordinates with your client, click on the Video Conference Link button in the case on CaseLines, copy and paste the link into your communication with your client.

Tip 9 – Navigate bundles

As a best practice, staff will provide you with access to your event hearing bundle (e.g. Motion) and an Orders and Endorsements bundle. You will receive access to more bundles if other events are scheduled and created through CaseLines.

You can navigate through your bundles on the Review screen by selecting the drop-down feature located on the top left-hand corner of the screen.

Tip 10 – Refer the judicial official to a specific page of a document

If you or the other party provide the judicial official with the CaseLines-generated document and page number (e.g. B17), you can type it into the Find Page Number field under the “Find” tab at the top of the screen and all participants will be taken directly to the correct page. Another way to direct a judicial official to a specific page of a document is to open the document in CaseLines, click on “Find” at the top of the screen, and then click on “Direct Others to Page”. This will send a message to all other parties that they can click to be taken to the same page.

Tip 11 – Use presenter mode to assist in your presentation during the hearing

You can use presenter mode to assist other participants in following your presentation during the hearing. This allows you to display specific pages and areas of a document on CaseLines for all participants.

To use this feature, click on the Present Tab and click Start Presentation to allow you to become the presenter. A red border will appear around the review pane, indicating that you are in presenter mode. Ask other delegates to click on the Present tab and then click Follow Presenter and choose your name. You will be able to see who’s following you by the list of names displayed at the top of the screen.

Tip 12 – Return to the last-viewed page of a document previously opened

If you have been moving between documents in CaseLines and want to return to the last-viewed page, click on “Find” at the top of the screen to make additional feature buttons appear, and then click on “Show the Previous Page”.

Tip 13 – View more than one CaseLines document on your screen

You can open multiple documents in CaseLines by clicking “View” at the top of the screen to make additional feature buttons appear, and then clicking on “Open in New Tab”. This will open another tab in your browser that will allow you to view the documents. You can also open two documents side by side on CaseLines by clicking on the Dual Panes Icon in the top right corner of your reading window (i.e. small overlapping rectangles). This will open a second reading pane so that you can read two documents side by side.

Tip 14 – Highlight or make notes on your documents using the Notes function

You can highlight or make notes on your documents in CaseLines using the Notes function. These functions are discussed in the CaseLines guide regarding Notes. To access the guide, login to CaseLines and then [click here](#). For a complete list of CaseLines guides, [click here](#).

Tip 15 – Upload your recent endorsements and orders

Your case will have an orders/endorsements bundle. Parties are asked to upload copies of orders and endorsements into this sub-bundle if they have not already been uploaded so that they can be accessed for upcoming events. This should include any order that remains in effect as well as any relevant endorsements, including endorsements that were made before electronic files were available to the Court.

Please remember to save the document descriptively, in accordance with the protocol (i.e. instead of Order, save as Order of Stevenson J., 1-FEB-2021).

Tip 16 – Use of Draft Orders Uploaded to CaseLines

Judicial officials can download and amend draft orders or other documents to help prepare their orders. You may therefore want to include draft orders with your materials.

Support

A Frequently Asked Questions (FAQs) resource for CaseLines is available online at: <https://www.ontariocourts.ca/scj/notices-and-orders-covid-19/supplementary-notice-september-2-2020/faq-caselines/>.

For assistance with technical issues, please contact Thomson Reuters technical support at 1-800-290-9378 and select either “CaseLines” or “Evidence Sharing” when you reach the directory, or email westlaw.softwaresupport@tr.com. Support is available from 8:00 a.m. to 5:00 p.m. (Monday to Friday).

The Ministry of the Attorney General’s Court Services Division is now offering a technology support hotline as additional help for self-represented litigants. The hotline directs self-represented litigants to a directory of support options. CaseLines is option 4 on the menu. Self-represented litigants will be able to call the hotline at 1-800-980-4962.

Please note that this does not relate to criminal matters. Self-represented persons will not use CaseLines in criminal matters.