

CaseLines User Guide

For Parties & Advocates

INTRODUCTION

This User Guide has been produced to help Parties and their representatives get started with CaseLines and provides an overview of the most commonly used functions. The SDT dedicated CaseLines website offers Solutions and Quick Reference Guides which Parties and their representatives should refer to for additional support. CaseLines is regularly updated to improve user experience and therefore the following guide should be used as a starting point only as it does not reflect any changes made after September 2026.

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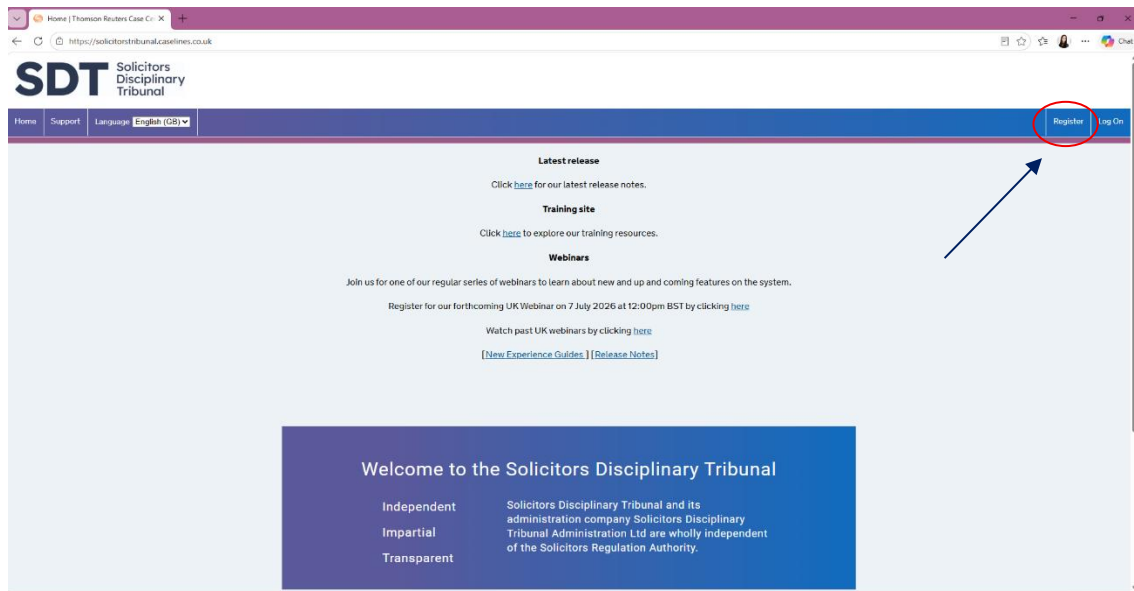
How to Access CaseLines

To access the CaseLines Home Page for the Solicitors Disciplinary Tribunal go to:

<https://solicitorstribunal.caselines.co.uk/>

Alternatively, a link to this website can be found on the SDT website home page.

To use CaseLines you will first need to register an account on the site.



How to Register

1. Click on the Register tab at the top of the Home Page.
2. Fill in your Account Information including:
 - Title, First Name, Last Name
 - Enter a valid primary email address. It is recommended that you hide your email address.
 - Create a password that has at least eight characters and contains an uppercase letter, a lowercase letter, a special character, e.g. ! and a number.
 - Read the Data Protection details and the Terms and Conditions of Use.
 - Tick the box to agree to be bound by the Terms and Conditions of Use.
3. Once you have filled in all the details correctly, the 'Register' button becomes active; click on it to register.

You will need to log in every time you want to access cases on CaseLines.

The screenshot shows a web browser window with the URL <https://solicitortribunal.caselines.co.uk/Account/Register/?tlang=en-GB>. The page title is "Register: Create a New Case Center Account". Below the title, it says "Please fill in all the fields.".

The form is titled "Account Information" and contains the following fields and error messages:

- Prefix:** Empty field.
- First Name:** Empty field. Error: "Enter your first name."
- Last Name:** Empty field. Error: "Enter your last name."
- Mobile phone:** Country code dropdown set to "UK (+44)". Error: "Please enter your email address."
- Email:** Empty field. Error: "Please enter your email address."
- Confirm Email:** Empty field. Error: "Confirmation email does not match original."
- Hide Email:** Checkbox labeled "Do not display my email address when showing me on the list of people for a case." is unchecked.
- Password:** Empty field. Error: "Please enter the password you would like to use."
- Confirm Password:** Empty field. Error: "Passwords must match. Please type the password again."

Below the form fields, there are two sections:

- Data Protection:** Thomson Reuters (provider of Case Center (formerly CaseLines) is committed to protecting your privacy. We will only use your information in accordance with our [Data Privacy Policy](#). If you have consented to us doing so, from time to time we may contact you by email with details of offers or promotions about products and services of interest to you or to help us improve our service through customer research.
- Terms and Conditions of Use:** To protect all our customers use of any Case Center (formerly CaseLines) services are governed by the [Terms and Conditions](#) of use.

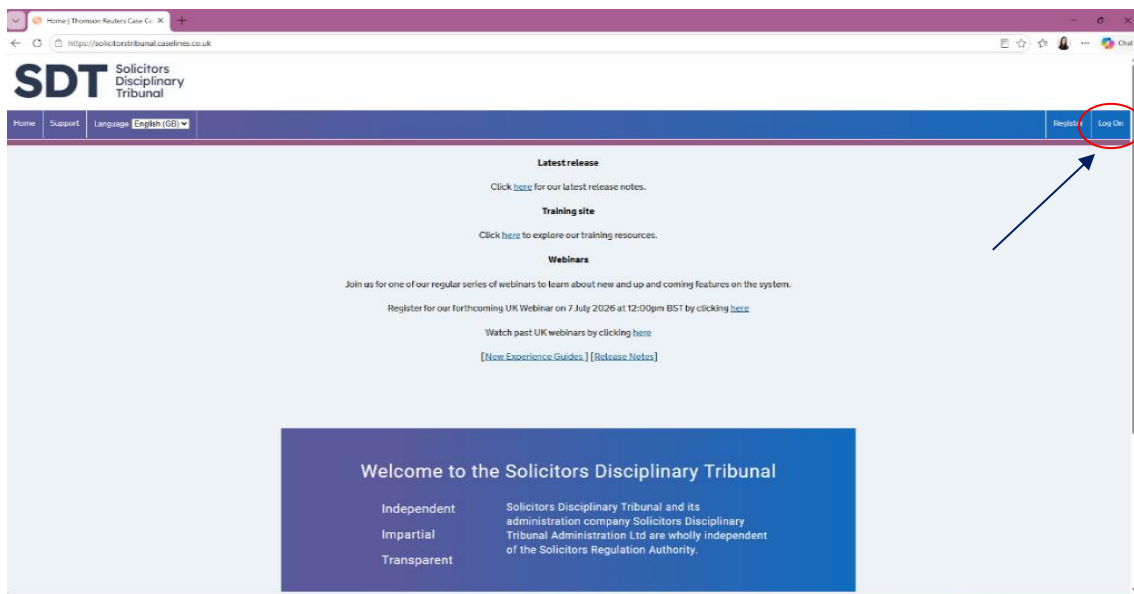
At the bottom, there are two checkboxes:

- ☐ I have read and agree to be bound by the terms and conditions above. Error: "Please agree to the terms and conditions."
- ☐ I consent to you providing me with business and marketing information.

The "Register" button is disabled. Error: "Please check your entries above."

How to Log On

1. Click on the Log On tab at the top of the Home Page.
2. Type in your email address or username and your password.
3. Tick the box marked 'Remember me next time?' if you are using your own device and if you want your browser to remember your login details. If you are using a court supplied laptop, please do not tick the box to remember next time.
4. If you have forgotten your password, click "Forgotten password".
5. You will be required to submit your username or email address. An email will be sent to you containing a link to reset your password.



☐ Remember me next time | [Forgotten password](#)

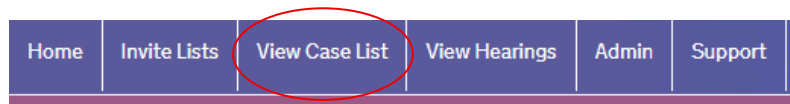
How to Find your Cases

To find the cases to which you have been invited:

1. Click View Case List located in the menu bar at the top of the webpage.
You will be presented with the case list containing all cases to which you have been invited.
2. Use the case filter, if required. You can filter by:
 - Hearing Date
 - Case Name or Reference
 - Training Cases
 - Completed Cases
3. Click Apply Filter to filter the case list.
4. Click Clear Filter to clear any search parameters.

All cases to which you have been invited will appear below.

5. Select the case you want. Click “Review Evidence” to view the bundle, or “Update Case” to amend the case, such as uploading documents or inviting people.



Case Filter:

Hearing Date From: (DD/MM/YYYY) Today This Week This Year

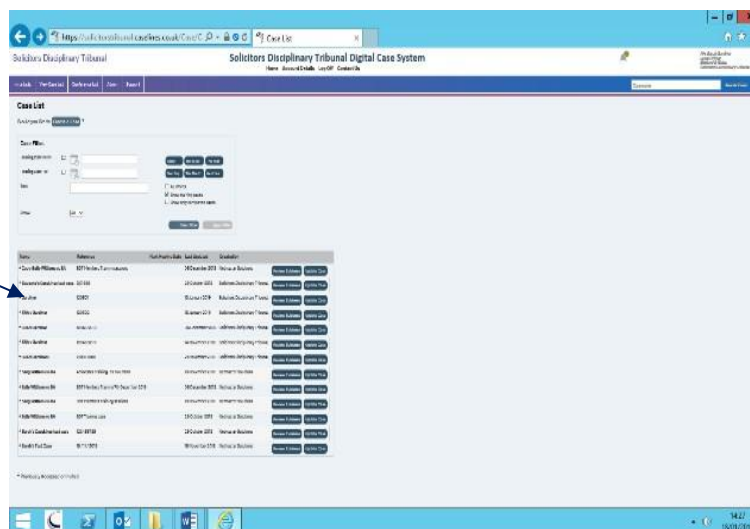
Hearing Date To: (DD/MM/YYYY) Next Day This Month Next Year

Case name / reference:

Show number of cases in case list: 20

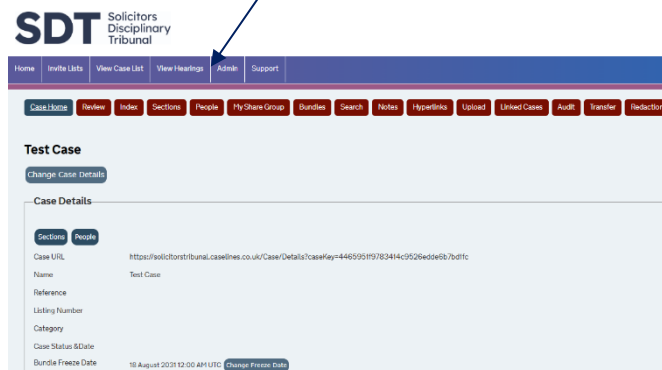
☐ All Words
☐ Show training cases
☐ Show closed cases
☐ Order by Listing Number

Clear Filter Apply Filter

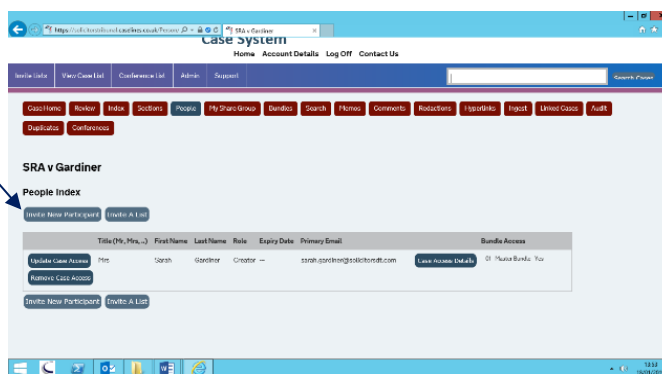


How to Invite People to the Case

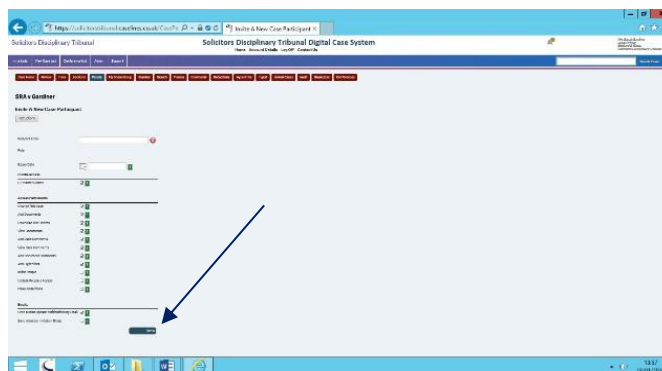
1. Click on the People tab.



2. Click on Invite New Participant.



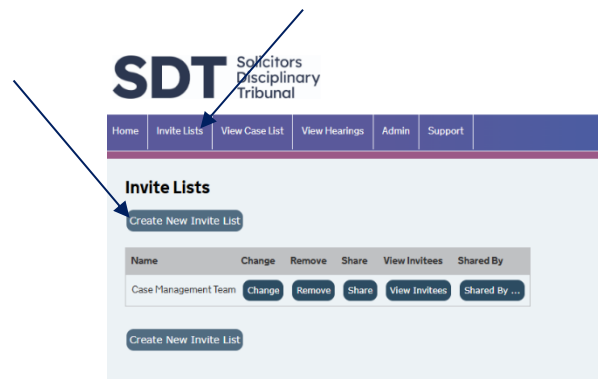
3. Enter the Person's details and click on Invite.



It is also possible to invite a group of people at the same time by creating an invite list. For example, you may wish to invite other members of staff who may be working on the case.

How to Create an Invite List

1. Click on Invite Lists tab at the top of the Home Page.
2. Click on Create New Invite List.

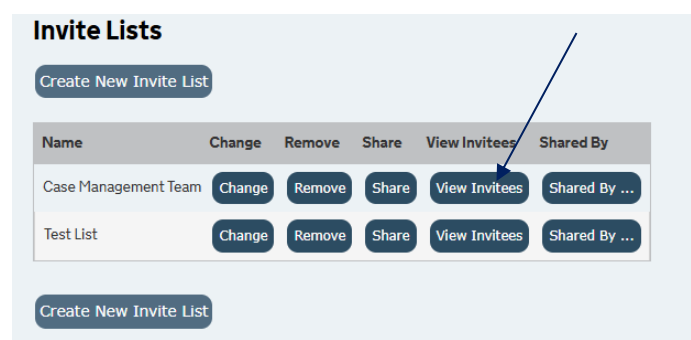


3. Enter the name of the list e.g., “CMT and Clerks PA” or “Clerks.”
4. Click on Create.

The screenshot shows the 'Create A New Invite List' form. It has a title 'Create A New Invite List' and a subtitle 'New Invite List'. Below the subtitle is a text input field labeled 'Name'. To the right of the input field is a red 'Create' button. At the bottom of the form is a red 'Back to Invite Lists' button.

The list of Invite Lists created will now appear.

5. Next add participants to the list – click on View Invitees.



6. Click on Add New Invitee, then enter the invitee's details and email address. Repeat this for each person you want to add to the group.

Invite List For Test List

[Add New Invitee](#) [All Invite Lists](#)

Add A New Invitee To Test List

New Invitee

Prefix

First Name

Last Name

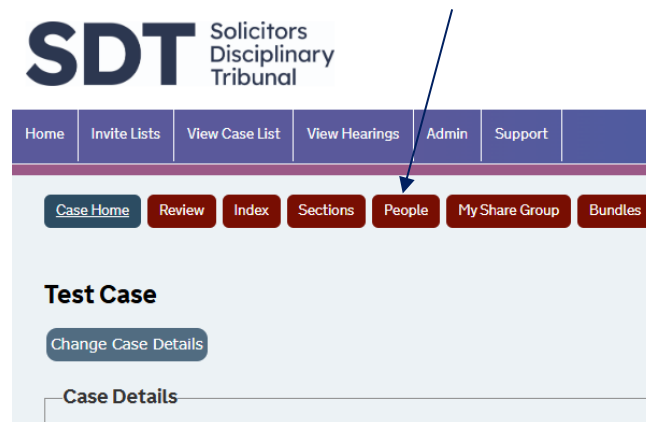
Email Address

[Add](#)

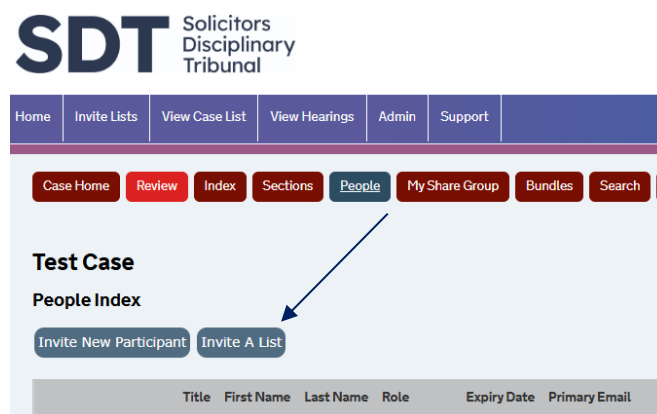
[Back to Invite Lists](#)

How to Invite a List of People

1. Click on the People tab.



2. Click on Invite a List.



3. Select the list of people you want to invite.
4. Click on Invite.

The Master Bundle

All documents uploaded to CaseLines will be automatically stored in the Master Bundle.

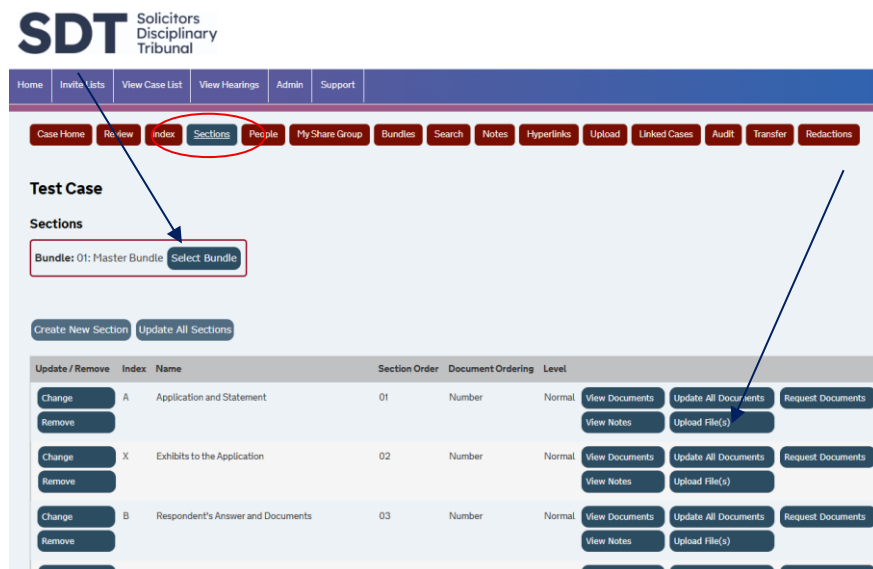
The Master Bundle is separated into the following Sections in compliance with the Protocol:

- A: Application and Statement
- X: Exhibits to the Application;
- B: Respondent's Answer and Documents;
- C: Applicant's Reply and Documents not previously filed;
- D: Witness Statements;
- E: Applications for an Order;
- F: Directions/Memos/Orders/Decision Sheet;
- G: Checklist/Civil Evidence Act Notice
- H: Costs and Statement of Means;
- I: Skeleton Arguments;
- J: Copies of all authorities relied on;
- K: Medical Reports;
- L: Character References;
- M: Relevant Correspondence;
- N: Video Evidence
- O: Agreed Outcome
- P: Restricted Documents (for Parties ONLY)
- Z: Late Submissions
- ZZ: Case Management Uploads

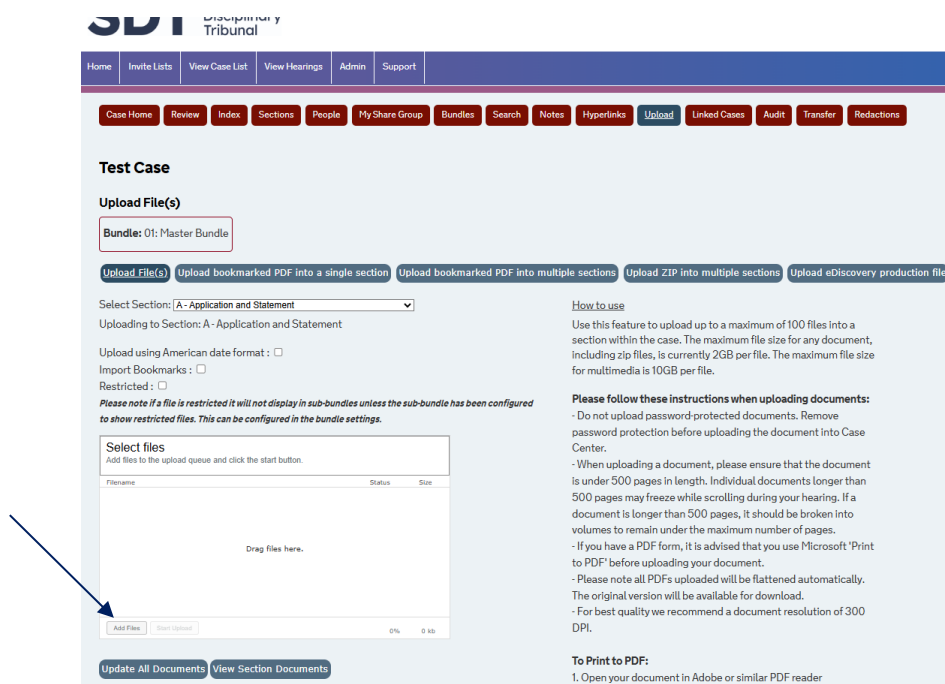
Any documents that are not agreed or are disputed must be uploaded to Section P: Restricted Documents (for Parties ONLY).

How To Upload Documents to Master Bundle

1. Select Sections tab at top of Case Home Page.
2. Select Master Bundle from Select Bundle.
3. Select Upload Files for the required Section of the Bundle to which document is to be uploaded.



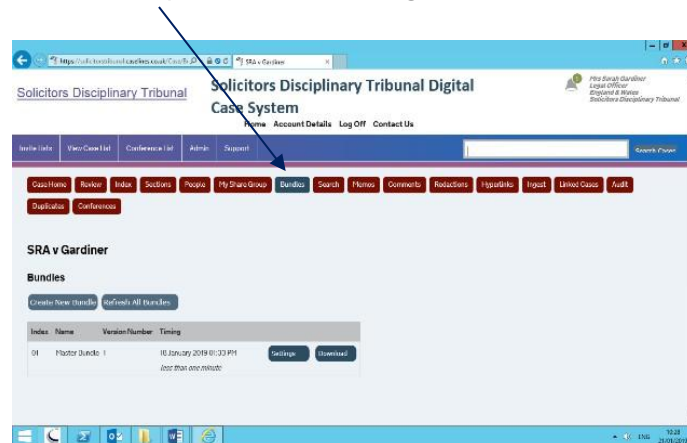
4. Click on Add Files.
5. Choose the files to upload from the pop-up box.
6. Then click on Start Upload.



The Files will then be uploaded to the Master Bundle.

The Hearing Bundle

1. Click on Bundles tab at top of Case Home Page.



The Panel will only have access to the Hearing Bundle. It is therefore important to ensure that every document required for the hearing is included in this bundle.

How to Move Documents Between Sections

1. Click the Sections tab and select the Master Bundle.
2. Click on View Documents.

SDT Solicitors Disciplinary Tribunal

Home Invite Lists View Case List View Hearings Admin Support

Case Home Review Index **Sections** People My Share Group Bundles Search Notes Hyperlinks Upload Linked Cases Audit Transfer Redactions

Test Case

Sections

Bundle: 01: Master Bundle **Select Bundle**

Create New Section Update All Sections

Update / Remove	Index	Name	Section Order	Document Ordering	Level	
Change Remove	A	Application and Statement	01	Number	Normal	View Documents View Notes Update All Documents Upload File(s) Request Documents
Change Remove	X	Exhibits to the Application	02	Number	Normal	View Documents View Notes Update All Documents Upload File(s) Request Documents
Change Remove	B	Respondent's Answer and Documents	03	Number	Normal	View Documents View Notes Update All Documents Upload File(s) Request Documents

3. Click on Update All Documents.

Test Case

View Documents

Bundle: 01: Master Bundle **Select Bundle**

A: Application and Statement

Upload File(s) **Remove All Documents** **Update All Documents** **View Notes**

A: **Application and Statement** (1 document, 10 pages)

Index	Name	Date	Bundle Number (BF)	Master Bundle Included-Inserted-Tabbed	
Move Remove	0001 Zoom-User-Guide-for-Remote-and-Hybrid-Hearings-January-2025 (1)	18 August 2026	1:A1 - A10	Yes-No-No	View PDF Open Original (.pdf)

4. Find the document and select Move.

Test Case

01: Master Bundle

A: Application and Statement **Documents**

Update All Documents

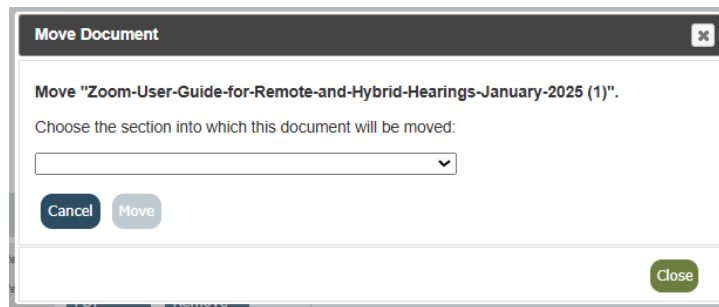
Click on an entry to edit. Changes are saved automatically.

Document Number	Document Title	Document Date	
0001	Zoom-User-Guide-for-Remote-and-Hybrid-Hearings-January-2025 (1)	18 August 2026	Move

Paginated: ☒ Inserted: ☐ Tabbed: ☐ Restricted: ☐

View **PDF** **Remove**

5. A pop-up box will appear. From the drop down, select the section you would like to move the document to. Once selected, click Move.

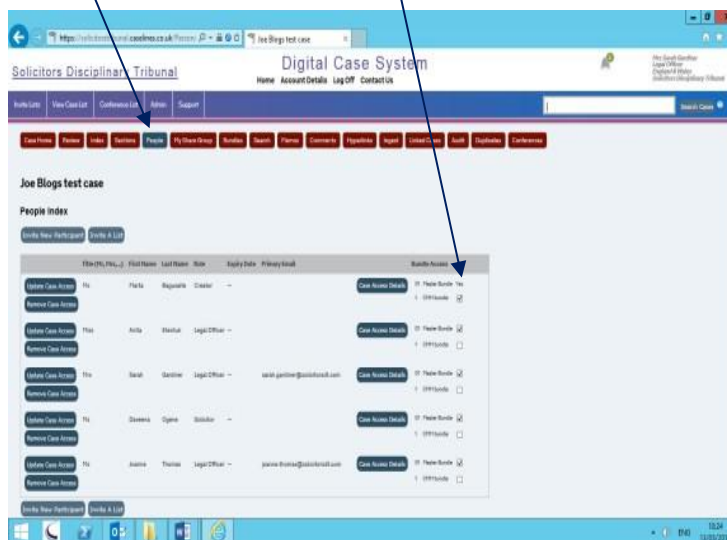


Please ensure that any documents that are not agreed or are disputed between the parties are moved to Section P: Restricted Documents (for Parties ONLY).

How to Give Access to the Hearing Bundle to People Already Invited to the Case

You will need to give anyone invited to the case access to the Bundle.

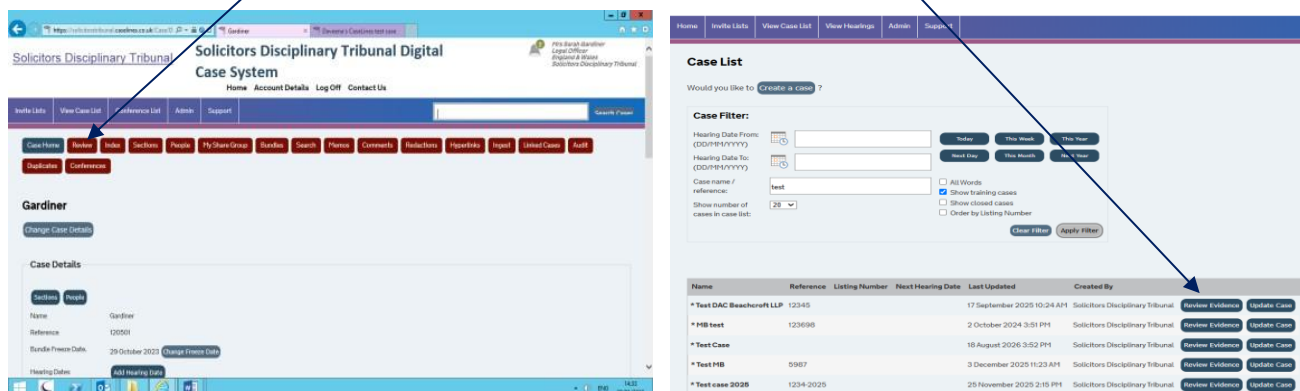
1. Click on People tab - a list of all people invited to the case will appear.
The Bundles to which each person has access will be indicated by a tick.
2. To give access to a particular Bundle select that Bundle for every person who requires access to it.



How to Access the Hearing Bundle

Access the Hearing Bundle by either:

1. Click on the Review tab at the top of the Case Home Page.
2. Or by clicking on Review Evidence on the View Case List page.

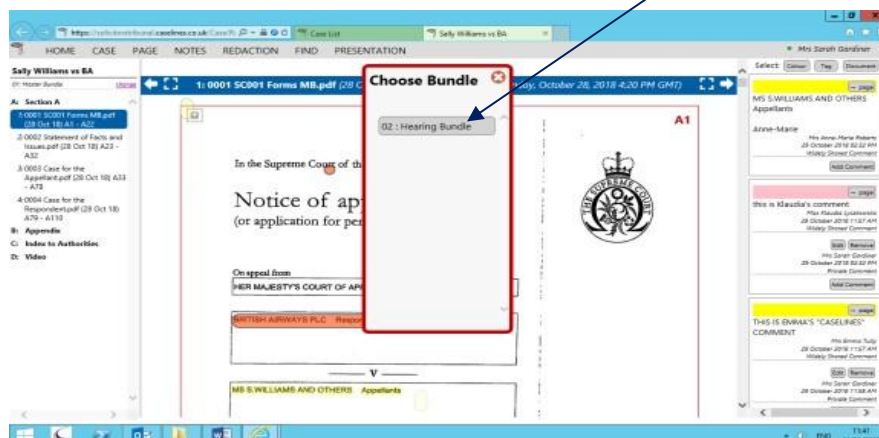


A new tab will open, and you will be taken to the Bundle. If you have been given permission to access the Master Bundle and Hearing Bundle you will be able to select which Bundle you want to look at. If you have only been given permission to access the Hearing Bundle, then that is the Bundle which will appear automatically.

3. To Select the Hearing Bundle or Master Bundle click on Change.

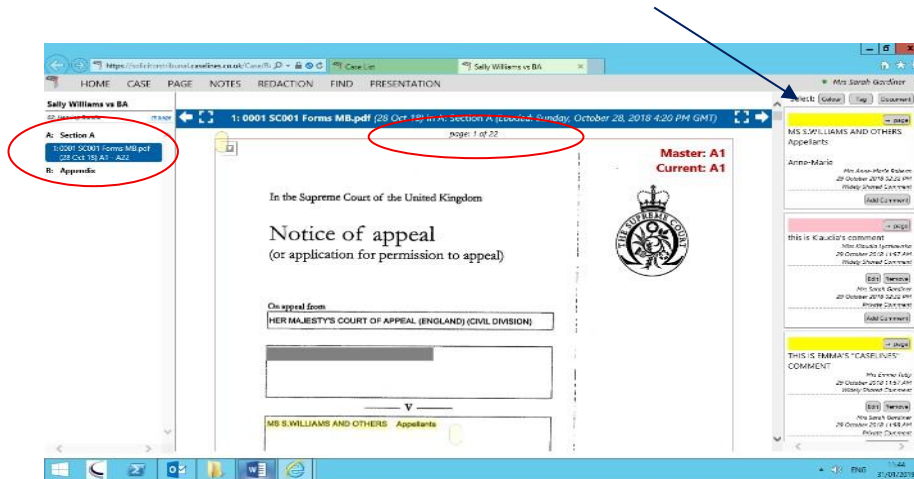


4. A pop-up box will appear listing the Bundles available. Select the Bundle required.



How to Navigate the Hearing Bundle

- Bundle pages appear in the middle of the screen.
- Index to Bundle Documents appear down the left-hand side.
- Any Document comments made appear on the right-hand side of the screen.



The Bundle can be navigated in a variety of ways:

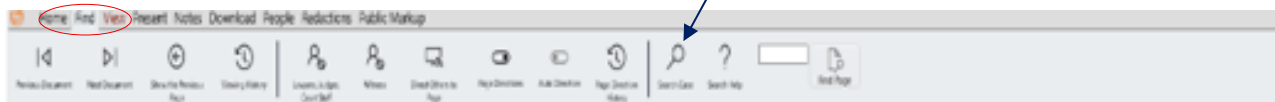
- scroll through using the arrow keys or the scroll bar down the side of the Document to navigate the Bundle in page order.
- Click on the Find tab and use any of the options to navigate to a particular document.
- Click on Document required in Index on left hand side of screen to be taken directly to the start of the document.
- Click on Find Page in Find tab and enter the page number required using Section Number and Page Number e.g. A22.



How to Search the Bundle

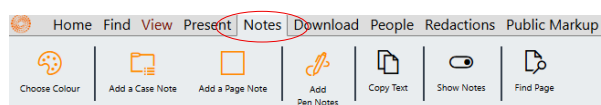
1. To search for a particular word or phrase when reviewing the Bundle click on Find tab.
2. Then click on Search Case Enter word or phrase required.

All occurrences of the word or phrase will be highlighted.



How to Highlight and Add Comments

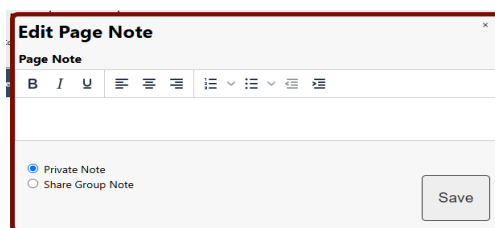
1. To highlight text, click on Notes from the tabs at the top.
2. Select the preferred option from the menu:
 - Add a Case Note – adds a note to the notes pane on the right-hand side, which can be set as either public or private.
 - Add a page note – can draw a filled box which highlights text selected, highlight the text freehand or draw freehand.
 - Add Pen Notes – highlighter, strike through, underline and pen size.
 - Choose Colour – the colour of the highlighted text can be changed. A pop-up box will appear, choose a colour then click on the white cross to close the pop-up box.



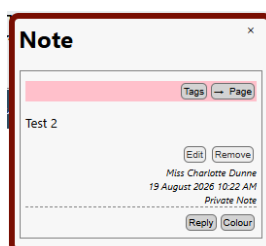
Adding a Page Note



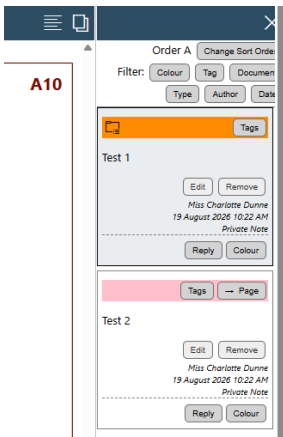
1. once you have selected your preferred option, the cursor will become a black cross.
2. Select the text.
3. A pop-up comment box will appear. Add any comment you wish or leave blank and click “Save”.
4. By default, the comment will be private, only accessible by the person making the comment. To share the comment with people in your share group select “Share Group Note”.



5. The text remains highlighted and an elongated bubble will appear to indicate that there is a comment. Hover over or click on the bubble to access the comment.



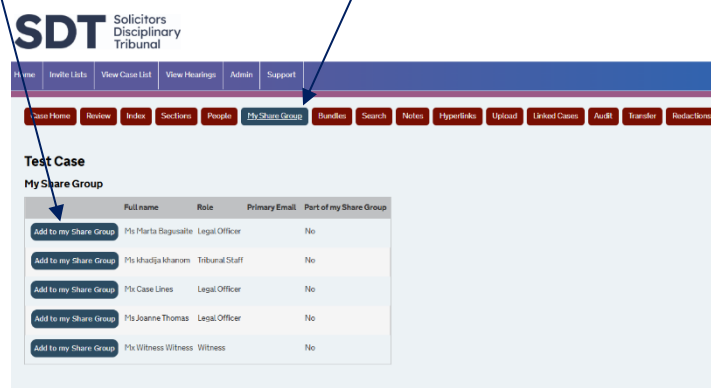
All comments will appear down the right-hand side of the screen.



How to Create a Share Group

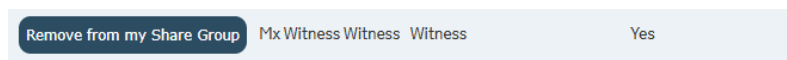
Creating a Share Group will allow you to share any comments you make with those in your share group only. These comments will only be accessible by those in your Share group.

1. To create a Share Group, click on My Share Group tab at top of the page. A list of everyone invited to the case will appear.
2. Click on Add to my Share Group for each of the people you want included in your Share Group.



You will see who has been added to your share group by “yes” appearing after their name.

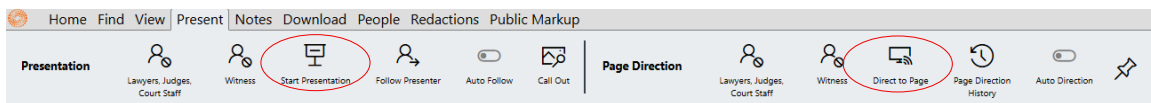
3. A person can be removed from your share group by clicking on Remove from my share group.



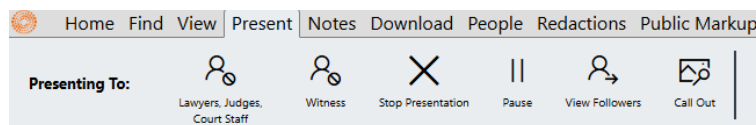
Court Presentation

During a hearing, any party may issue a Page Direction to direct others in the court to a particular page of the bundle.

1. Click on the Present tab.
2. **To direct to a single page:** Find the page you want others to look at then click Direct to Page. A pop-up box will appear for anyone looking at the bundle inviting them to the page. Accept the request and the viewer will be automatically taken to that page.
3. **To direct to multiple pages:** If a party wants to direct the court to a number of pages, then click on Presentation tab at the top of the page.
4. Then click on Start Presentation.

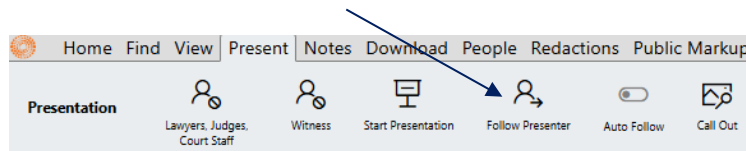


The Presentation can be paused or stopped at any time.



5. **To follow a presentation:** To follow a presentation initiated by someone else click on Follow Presenter and select the Presenter to follow from the pop-up box.

Following the Presenter can be paused or stopped at any time.



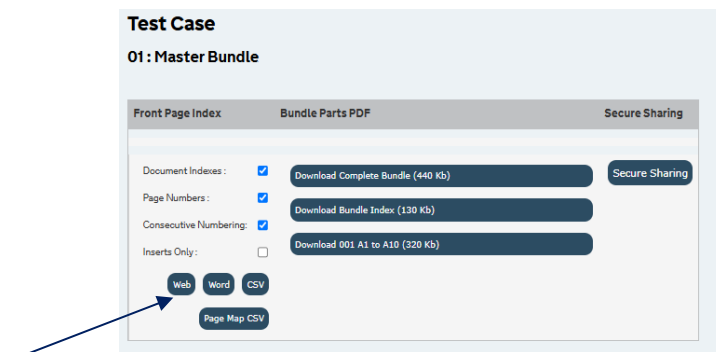
How to Download a Hearing Bundle

1. Click on Bundles tab at top of page.
The Hearing Bundle and Master Bundle will be listed.
2. Click on Download button for the Bundle you want to Download.



You can download the complete Bundle or just the Index or just a Section of the Bundle.

3. Make your selection. The Bundle can be downloaded to a web page or as a word document which you can then save to your device.

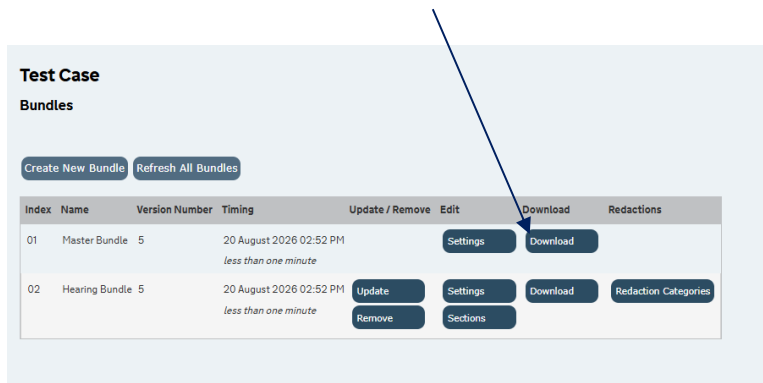


Please remember the downloaded version of the Bundle will not be updated. If any updates are made to the Bundle you will have to download a new copy.

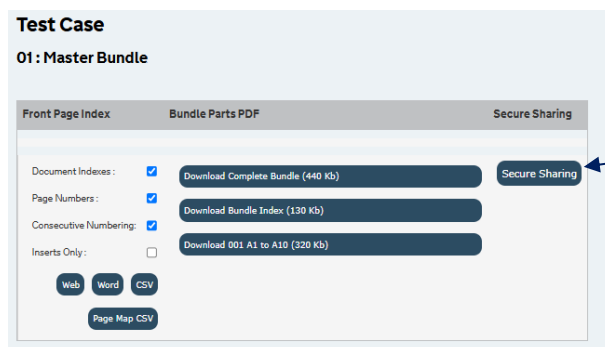
How to Share the Hearing Bundle Securely

You may want to share a complete version of the Bundle. This can be done securely through Case Lines.

1. Follow the Steps above to download the Bundle. Select the Bundle you want to share.



2. Click on Secure Sharing.



3. Enter the email address of the person you want to share the Bundle with and follow the instructions for entering a code word.
4. Click on Securely Share Full Bundle.

Test Case

Master Bundle

Send by Secure Sharing

Secure Sharing is a way of sending the Bundle for this case to an email address:
The recipient will receive two emails, each with a link. When the recipient has clicked on both links they will have access to the Bundle and will, for 72 hours from now, be able to download the Bundle to their PC. For further security, you can enter a password (e.g. 'boat'). It is your responsibility to communicate the password to the recipient. Passwords are optional.

Email Address:

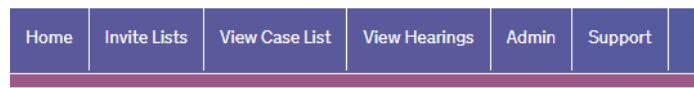
Code Word (optional):

[Back to the Case Bundle](#)

Additional Support and Quick Reference Guides

For additional support on anything not covered by this guide please refer to the online CaseLines support.

1. This can be accessed by clicking on Support at the top of the page.



You will now be directed to the Solutions page where you can raise a ticket through Create Support Case with any specific query directly to CaseLines or search Reference Guides and Tips and Tricks through the Knowledge.

