

## Rules for Entry of Party Names

### Names of Individuals

Capitalize the first letter of the first, middle and last names only. Enter the last name in the last name field, the first name in the first name field, and the middle name in the middle name field. (If only a middle initial is provided, enter it with a capital letter followed by a period.)

Type the generation, if there is one, in the generation field (e.g. Jr., Sr., III).

- Titles (e.g. M.D., PhD.) Use the **Party text** field **only**. Do not include titles in the generation or last name field.

### Company and organization names

- Type company or organization names in the last name field. Leave the first name, middle name, and generation fields blank.

Company names with initials should be added with no spaces between the first and second initials.

**Example:** A.B. Truck Lines

- Company names using initials such as GMAC, PG & E should be spelled out with the exception of the name that is only part of the name not the whole name.

**Example:** General Motors Acceptance Corp.

**Example:** Pacific Gas and Electric Co.

**Example:** RDI Financial Inc.

"The" as the first word in a name. Type it in before the name.

- Ampersands (&): Do not use the ampersand symbol in names or addresses. Type the word "and" instead of the ampersand.

**Example:** A and A Seed Co.

- Associates, Association, Company, Corporation, and Incorporated: Abbreviate as "Assoc." "Assn.", "Co.", "Corp." and "Inc."

"of" and "the": Use all lower case letters when in the middle of a name.

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- LLC, LLP, LP, N.A., FSB, Esq: Do not add as part of the name.

Use the **Party Text** field only.

- Aka, faka, dba, fdba: Do not add as part of the name, add them in the alias field.
- State of Agencies: Type the two letter state abbreviations followed by the department name on the same line. Remember to indicate the state's name even if it is not part of the agency title.

**Example:** CA Franchise Tax Board

- County agencies: Type the county name followed by department name.

**Example:** San Francisco County Tax Collector, Santa Cruz County Assessor

- If county or city is the name of the party, type the "County of" or "City of" then followed by the name.

**Example:** County of Marin, City of San Jose

- Government agencies are to be added in the following manner:

**Example:** U.S. Dept. of [agency]

**Example:** U.S. Dept. of Veterans Affairs

There are a few exceptions to this rule such as:

**Example:** USDA Rural Development [fdba Farmers Home Administration; fdba Rural Economic and Community Development Services]

**Example:** Internal Revenue Service

- Since a Trust or Estate is a legal entity, they should be added as they are filed, with the **exception** of "**The**" in the beginning.

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**Example:** "The Estate of John Doe" would be entered in the last name field as: "Estate of John Doe"  
would be entered in the last name field as: "Trust of Jane Doe"

- Calif. Auto Dealers, Inc. is spelled out

**Example:** California Auto Dealers, Inc.

- A doctor, dentists, etc., should be added [if an individual] with the first name in the first name in the first name field, last name in the last name field. MD or DDS etc.. should be added in the **Party Text** field.
- When adding a party with a "partnership" or "a California Corporation" in the name the party text field should be used.

**Example:** Hancock Insurance Company, a California Corporation would be entered:

**Last/Business Name Field:** Hancock Insurance Company

**Party Text:** an California Corporation

REMEMBER TO ALWAYS SEARCH CAREFULLY BEFORE ADDING!!

**Manual Chapter:** Getting Started

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