

Public Access Changes

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CM/ECF Version 4.0.2

Effective August 31, 2009, the District will upgrade CM/ECF to V.4.0.2. The following document explains the changes.

Really Simple Syndication (RSS)

To allow for easier public access to specific data, CM/ECF now provides users with an RSS fee for notification with links to docket sheets and documents. RSS is a type of XML that allows Internet browsers and other feed readers to display information from a website. Users can subscribe to RSS feeds so they will be notified every time content is updated on a particular site.

- Case-specific RSS feeds will not be included.
- Feeds will be based on event types.
- A standard RSS reader will not be provided with CM/ECF.
- Users must acquire, install, and configure third-party RSS reader software before they can use this feature in CM/ECF.
- The Court Information report will include the RSS feed available to public users.
- Public users get an all or nothing, RSS feed based on the events the court allows to be included in the feed.
- Feed includes the last 100 entries of the court-defined event types that have

been docketed. If the user selects the Last 100 entries – Internet option, a subsequent screen appears; the user can subscribe to the feed from this screen. A sample list of recent docket entries also appears on this screen.

Court Information

Court Details	
Court's Name	Administrative Office of the US Courts (104d)
Software Version	CM/ECF-DC V4.0
ECF Go Live Date	01/01/2002
Maximum PDF File Size	15 MB
Maximum Merge Document Size	20 MB
RSS Feed	 Last 100 entries - Internet
Docket entries of type: motion	

- Users can avoid being prompted for a login every time they click on a case number or document link by staying logged in to CM/ECF with the default browser used by the RSS reader.

Combined Docket Report

Users now can run a combined Docket Report for a subset of criminal defendants in a multi-defendant case.

- A new *View Combined Docket Report* checkbox will be displayed beneath the case number list when a case number for a multi-defendant criminal case has been entered and two or more of the criminal defendant cases have been selected.
- Selecting the *View Combined Docket Report* checkbox allows the user to run the combined form of the report for the chosen subset of defendants.
- The combined Docket Report displays all of the defendant, party, and attorney information in the top section of the report for those defendants selected.
- The combined proceedings of the chosen defendants are displayed in the bottom section of the report.

Query

The Query screen was modified to provide more options to allow for more refined searching.

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- The party name search fields were combined with the case data search fields to form a single section.
- A *Cause of Action* select list was added.
- The redundant row of *Case status* radio buttons was removed.
- The second instance of the *or search by* text was removed.

Query

Search Class

Case Number

or search by

Case Status Open Closed All

Filed Date to

Last Entry Date to

Nature of Suit
 (280)
 110 (Insurance)
 120 (Contract: Marine)

Cause of Action
 (No cause code entered)
 00:0000 (No Cause Code Entered)
 02:0431 (02:431 Fed. Election Commission: Failure Enforce C)

Last/Business Name (Examples: DoeCo, Doe#)

First Name Middle Name

Type

Redaction Message

The following text was added to the log in screen to remind users of the need to redact certain information:

IMPORTANT NOTICE OF REDACTION RESPONSIBILITY: All filers must redact Social Security or taxpayer-identification numbers; dates of birth; names of minor children; financial account numbers; and, in criminal cases, home addresses in compliance with Fed.R.Civ.P 5.2 or Fed.R.Crim.P.49.1. This requirement applies to all documents, including attachments.

I understand that, if I file, I must comply with the redaction rules. I have read this notice.

- Attorney users must check this new checkbox before logging in.
- Hyperlinks to the specific Federal Rules of Civil Procedure and Federal Rules of Criminal Procedure that cover the redaction requirements were added to the login screen.

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CM/ECF Filer or PACER Login

Notice

This is a **Restricted Web Site** for Official Court Business only. Unauthorized entry is prohibited and subject to prosecution under Title 18 of the U.S. Code. All activities and access attempts are logged.

Instructions for Filings:

Enter your CM/ECF filer login and password if you are electronically filing something with the court.

If you received this login page as a result of a link from a Notice of Electronic Filing email:

Enter your CM/ECF filer login and password. The system prompts customers for a CM/ECF login and password when attempting to view certain types of documents.

If you have trouble viewing a document:

After successful entry of your CM/ECF login, you should be able to view the document. If you receive the message "You do not have permission to view this document," viewing the document is restricted to attorneys of record in the case and the system does not recognize you as such. If the login prompt appears again, after you have entered your CM/ECF login and password, it means that the "two look" link has expired. You will need to enter your PACER login and password to view the document.

Instructions for viewing filed documents and case information:

If you do not need filing capabilities, enter your PACER login and password. If you do not have a PACER login, you may register online at

<http://pacer.uscourts.gov>.

Authentication Login: <input type="text"/> Password: <input type="password"/> Client ID#: <input type="text"/> Date: <input type="text"/> <input type="button" value="Login"/> <input type="button" value="Reset"/>	IMPORTANT NOTICE OF REDACTION RESPONSIBILITY: All filers must redact Social Security or taxpayer identification numbers, dates of birth, names of minor children, financial account numbers, and, in criminal cases, home addresses, in compliance with Fed. R. Civ. P. 5.2 or Fed. R. Crim. P. 49.1 . This requirement applies to all documents, including attachments. <input type="checkbox"/> I understand that, if I do, I must comply with the exclusion rules. I have read this notice.
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Notice

An access fee of \$0.05 per page, as approved by the Judicial Conference of the United States, will be assessed for access to this service. For more information about CM/ECF, [click here](#) or contact the PACER Service Center at (800) 676-6896.

CM/ECF has been tested and works correctly with Firefox 3.0, and Internet Explorer 6 and 7.

- In addition, the reminder question *Have you redacted?* has been added to the final docket text review screen during docketing.

Attaching Documents

The process of adding a main document and attachments during docketing has been streamlined to only require one screen.

- The document upload screen changes dynamically based on the number of attachments added, and other actions taken by the user.

Motions

[7:08-cv-00001-F.J.Foley, Davis](#)

Select the **pdf** document and any attachments:

Main Document

Attachment	Category	Description
1	<input type="text"/> <input type="button" value="Browse..."/>	<input type="text"/>

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- When the user clicks the **Browse** button in the *Attachments* section to add the first attachment, then selects a PDF document, selects a category or enters a description (or both), a new row will appear so the user can then add a second attachment, and so on.

Motions
7:08-cv-00001-FJE Foley v. Davis

Select the pdf document and any attachments.

Main Document
C:\Documents and Settings\jacob\Doc\ Browse...

Attachments	Category	Description
1. C:\Documents and Settings\jacob\Doc\ Browse...	Attachment	Remove
2. C:\Documents and Settings\jacob\Doc\ Browse...	Exhibit A	Remove
3. Browse...		

Next Clear

IF...	THEN...
Only two attachments should be added	leave the fields in the third row blank and click Next
Additional attachments should be added	Click Browse for each attachment and then add the document
An attachment should be removed	Click Remove . Tip: If, for example, Attachment 1 is removed and there is a second attachment, Attachment 2 would become Attachment 1, etc.
An attachment file is incorrect and needs to be replaced	Click Browse again for the attachment and load a different document
The user clicks the Clear button after adding documents and attachments	the screen will be returned to the default state.

Document and Attachment Numbering

The document selection screen was modified to include:

- the main document number,
 - and the attachments are numbered beginning with 1.
-

- attachment numbers are consistent everywhere they appear (e.g., docket text, the document selection screen).
- file sizes and the total size of all of the documents for a docket entry are displayed on the document selection screen.

Document Selection Menu

Select the document you wish to view.

Document Number: 4		1 page	67 kb
Attachment	Description		
1	Appendix	1 page	67 kb
2	Exhibit	3 pages	39 kb
<input type="button" value="View All"/> or <input type="button" value="Download All"/>		5 pages	172 kb

NOTE: This change applies to all attachments, regardless of when the docket entries were filed. Therefore, if a user had printed documents and attachments prior to the upgrade, the attachment numbers would be different in the printed documents than in the CM/ECF system after the upgrade.

General Announcement Emails

Courts now can send general announcement email messages to users with email addresses in CM/ECF.

- Users have the option of opting in to these announcement email messages.
- However, the court can force the email announcement to be sent in situations where vital information needs to be distributed.

Case Participants

The user interface for docketing has been modified to include a case participant tree on the left side of the screen.

- All case participants are listed for easy reference.
- When adding a party, icons appear in the tree to allow for modifying participant information, and adding attorneys, aliases, and corporate parents.
- The new user interface is used in docketing so the user can readily see all case participants during the process of selecting the filers and attorneys.
- There are no icon controls for existing participants in the participant tree

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- during docketing so as to maintain the status quo of participant processing.
- The tree is merely for reference purposes during docketing.
 - If a new participant is added during the docketing process, then icon controls will be available for that new participant only.

The following is a description for each of the icons that may appear in the participant tree.



Delete this party from this case.



Add new alias, corporate parent, or attorney.



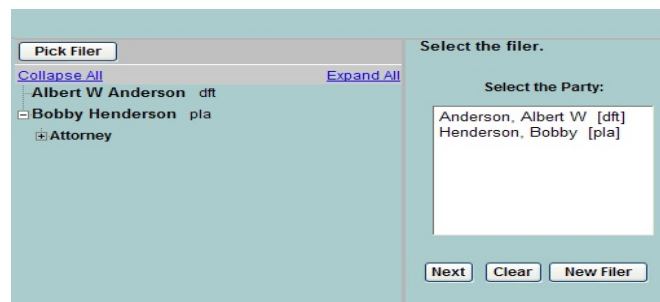
Copy attorney(s) from other parties in the case to this party.



Edit the party, alias, or corporate parent. Only displays beside actual names of participants, so if no participant has been added, this icon is suppressed.

Select a filer

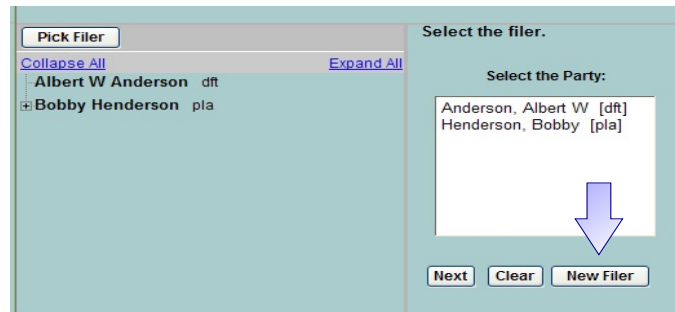
The Select a Filer screen displays with the existing case participants in the participant tree on the left side of the screen.



To add a new party (civil only),

To add a new party to an existing case during docketing:

- Click the **New Filer** button.



The screenshot shows a 'Pick Filer' dialog box. On the left, there is a list of filers: 'Albert W Anderson dft' and 'Bobby Henderson pla'. Above the list are 'Collapse All' and 'Expand All' links. On the right, there is a section titled 'Select the filer.' with a sub-section 'Select the Party:' containing a list of the same two filers. Below this list is a blue arrow pointing downwards. At the bottom of the dialog are three buttons: 'Next', 'Clear', and 'New Filer'.

- Search for and add a new party using the search screen.



The screenshot shows a 'Search for a party' dialog box. On the left, there is a list of filers: 'Albert W Anderson dft' and 'Bobby Henderson pla'. Above the list are 'Collapse All' and 'Expand All' links. On the right, there is a search form with three input fields: 'Last / Business Name', 'First Name', and 'Middle Name'. Below these fields is a 'Search' button.

- Choose the party role and click the Add Party button.

- The new party is added to the party pick list and is highlighted in the list.
- The new party also is added to the participant tree.
- To add more parties, repeat this process.
- Parties that are added to civil cases during docketing will have control icons in the participant tree so the user can add aliases, corporate parents, etc. for the party during this process.
- If the right pane of the screen does not contain the party pick list (e.g., the user searched for a new party but then decided not to add one), to bring the party pick list back to the right pane, the user should click the **Pick Filer** button at the top of the screen.

Processing a Large Civil Case

When a civil case has a large number of participants, the participants are sorted in alphabetical order by last name, and are grouped into chapters. Each chapter is displayed in the participant tree as a hyperlink. If the user clicks a chapter hyperlink, the participants in the chapter are listed in the tree.

Maintain Your Email Account

The Email Information screen in Maintain Your Email has been modified to provide more streamlined functionality.

- Additional options are presented to the user rather than being hidden.
- Cutting and pasting multiple case numbers from one delivery method to another is now allowed.
- The initial Email Information screen is divided into two sides. On the left side, there are two add new email address hyperlinks—one for the primary email address and one for the secondary email addresses.

Email Information for Nicolas Mercator

Registered e-mail addresses	Configuration options
<i>Primary e-mail address:</i> add new e-mail address	Select an e-mail address to configure.
<i>Secondary e-mail addresses:</i> add new e-mail address	
<input type="button" value="Return to Person Information Screen"/> <input type="button" value="Clear"/>	

Modifying email accounts

Attorneys registered for CM/ECF should always have a valid and current email address and are responsible for maintaining a current address at all times. To **edit** a primary or secondary email address:

STEP	ACTION
1	Click on the address on the left side of the screen. This will cause the email address to display in a text field on the right side of the screen, along with all the configuration options and case lists (if any) associated with the email address.

STEP	ACTION
2	Remove the email address from the text field.
3	Type the new address in the text field. Tip: If the user click anywhere outside the text field while a complete email address is not in the text field, all of the configuration options and case lists will disappear from the screen, and the previous email address and settings will be removed.

Modifying email configuration options

The primary and secondary email accounts can also be configured to choose the method of receiving Notice of Electronic Filings from the court:

Option	Explanation
Should this email address receive notices?	For the primary email address, the default is Yes . To disable the primary

Option	Explanation
	address, select No . If set to No , the primary email address will not receive notices of electronic filing (NEFs)—this is not recommended.
How should notices be sent to this e-mail address?	Sets the default delivery method for notices sent to this address. If Per Filing , an email will be sent for each individual NEF. If Summary Report , one daily summary email notice that lists all the filings for that day will be sent; if this option is selected, an additional option is added to the screen: <i>Should this e-mail address receive a “no activity” notice when no summary noticing occurs?</i> If Yes , the Daily Summary Report email will include the message “no transactions found for this time period” if no activity occurs in the cases for which the user is configured to receive summary notices. If No , then no email will be generated when there is no activity in the cases.
In what format should notices be sent to this e-mail address?	Controls the format of the emails—either HTML or Text .
Should this e-mail address receive general announcement notices from this court?	If No , the user will not receive general court announcement email message unless the court overrides the user’s preference (e.g., the message is urgent and must be sent to all users).
Show all cases for this e-mail address	Displays a list of all of the cases for which the user is configured to receive NEFs.

- To **add additional cases** for which to receive NEFs:

STEP	ACTION
1	Enter the case number(s) in the Add additional cases for noticing text field
2	Click Enter or Find This Case button
3	Select the appropriate case(s)
4	Click Add case(s) button. This will add the case(s) to the list of cases in the default method of service list (the first list of cases)

- To **move cases** from the default method list to the alternate method list:

STEP	ACTION
1	Click the case number(s) in the primary list
2	Click the Change selected cases to notice as a summary report button. Tip: If summary noticing is the default method, then this button will be labeled Change selected cases to notice per filing
3	The cases will be moved to the alternate method list.

- To **delete cases** from the default method list or the alternate method list

STEP	ACTION
1	Select the case(s)
2	Click the Delete selected cases button

In the screen below, only the bottom right portion of the Email Information screen is shown.

Case-specific options

Add additional cases for noticing

These cases will send notice *per filing*. (default method)

4:08-cr-00002 USA v. Beethoven

Delete selected cases Change selected cases to notice as a summary report

These cases will send notice as a *summary report*. (alternate method)

7:08-cv-00001-FJF Foley v. Davis
6:08-cr-00001-LRL-FJF USA v. Johnson

Delete selected cases Change selected cases to notice per filing

Note: For secondary email addresses, the additional **Should this e-mail address receive notice for all cases in which this individual is a participant?** option appears in the Configuration Options section of the screen. The user can answer **Yes** or **No**.