CM/ECF Releases 6.0 and 6.1

A Guide to the New Features Available
To Attorneys and Law Firm Staff
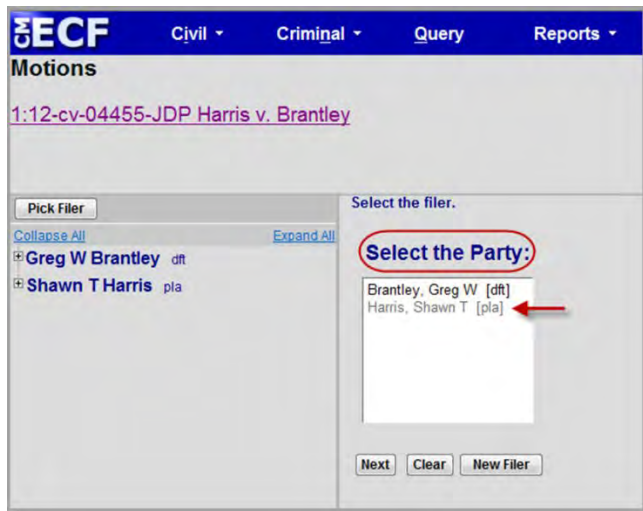
Table of Contents

Docketing

Attorneys no longer can be added as counsel for an opposing party or select parties that are not on the attorney's 'side'.

In the event that the Link Party/Attorney screen creates a new attorney-party relationship, docket text will append the attorney-party update to the docket text. The docket text with relationship text appended is as follows:

MOTION for leave to appear filed by Robert Smith on behalf of Tom Brown. Suggestions in opposition/response due by 8/21/2013 unless otherwise directed by the court. **(Attorney Robert Smith added to party Tom Brown (pty:dft))** (Jones, Robin) (Entered 9/23/2013)

Inactive Attorney Email Addresses

If an attorney modifies the user information screen and selects "No" to the "Should this email receive notices?" prompt, the attorney will not receive notice of any filings. This selection overrides the case participant record which may show that that the attorney is to receive notice. Because the docket sheet is generated from the case settings, the docket report will display "Attorney to be Noticed" under the attorney's information. ECF has labeled these email addresses as inactive. When an attorney has an inactive email address, the label *(Inactive)* now appears beside the email address on the docket sheet.

Selecting Specific Documents when Creating a Record or Appendix

Users are now able to select specific documents for selected docket entries when creating an appendix. When the Docket Report is run in Create Appendix mode, an expand button is displayed next to the document number if a docket entry has more than one document. The user

can select specific attachments and/or the main document. If the default checkbox for the entry is checked, then all the individual checkboxes for specific documents for that entry are grayed out, because the attachments will be included automatically.

The PDF version of the Docket Report or Abridged Docket Report merged into the Record on Appeal will contain rows specifying which documents are attached or not for each document in an entry only if specific document(s) are selected in an entry. If all documents are selected in an entry by selecting the main checkbox, then information about each document is not included for that entry.

Bottom Portion of the Docket Report in Create Appendix Mode, with the Plus Sign (+) Icon Clicked for Docket Entry Number 2

Date Filed	#	clear	Sort Order	Docket Text
09/26/2011	◐ 1 ⊞	☐		COMPLAINT against John Venn, filed by George Riemann. (Gibson, Brandi) (Entered: 09/26/2011)
09/26/2011	◐ 2 ⊟	☐ 1.05MB		MOTION to Dismiss by John Venn Responses due by 10/14/2011 (Gibson, Brandi) (Additional attachment(s) added on 9/29/2011: # 1 Exhibit, # 2 Appendix) (Gibson, Brandi). (Entered: 09/26/2011)
		☐ 503.13KB		*Main Document*
		☐ 71.23KB		Attachment # 1 *Exhibit*
		☐ 503.12KB		Attachment # 2 *Appendix*
09/26/2011	◐ 3 ⊞	☐ 419.88KB		RESPONSE to Motion re 2 MOTION to Dismiss filed by George Riemann. (Gibson, Brandi) (Entered: 09/26/2011)
09/26/2011	◐ 4 ⊞	☐ 419.88KB		REPLY to Response to Motion re 2 MOTION to Dismiss filed by John Venn. (Gibson, Brandi) (Entered: 09/26/2011)
09/26/2011	◐ 5 ⊞	☐ 300.46KB		AFFIDAVIT in Opposition re 2 MOTION to Dismiss filed by George Riemann. (Gibson, Brandi) (Entered: 09/26/2011)

Footer format: USCA7 <pagenum>   ⦿ Include full docket sheet   ⦿ Include documents in Appendix
(Numbers, letters, spaces, and <pagenum> only)   ○ Include abridged docket sheet   ○ Include document hyperlinks in Appendix

[View Selected]   Total filesize of selected documents (MB): [____]
or   Maximum filesize allowed (MB): 0.5
[Download Selected]

Displaying Party Roles in Output Lists

Party roles are now displayed beside party names listed on the *Select A Person* query screen. When the user selects a party from the *Select a Person* screen, the sub-header on the *Select a Case* screen now includes the role type for the party.

Select a Person Screen with Party Role Displayed   *Select a Case Screen with Party Role Displayed*

Select A Person

There were 5 matching people.

Newton, Isaac	(pty) [counter defendant]
Newton, Isaac	(pty) [defendant]
Newton, Isaac	(pty) [material witness]
Newton, Isaac	(pty) [plaintiff]
Newton, James	(aty)

Select A Case

Isaac Newton is a plaintiff in 21 cases.

1:08-cv-00408-EDE-TCT	Newton v. Leibnitz et al	filed 08/17/08
1:08-cv-01047-AAA	Newton v. Descartes	filed 12/05/08
1:08-cv-07001-XRX-SDS *SEALED*	Newton v. Leibnitz	filed 05/23/08

Warning to PACER Users Regarding Query Searches

If a PACER user is unaware that name and case searches (by filed date or last entry date) are not subject to the 30 page billing cap, they may end up incurring substantial charges. The following new message appears on the Query selection criteria screen for attorney and PACER users:

> WARNING: Search results from this screen are NOT subject to the 30 page limit on PACER charges. Please be as specific as possible with your search criteria.

Exact Matches Only on Query Selection Screen

The Query selection screen now includes an *Exact Matches Only* checkbox beside the *Last/Business Name* field. If this option is checked, the results include only exact matches to the search string entered in the *Last/Business Name* field.

Query Selection Screen

Mobile Query

The mobile PACER Case Locator (PCL) provided by the PACER service center is now linked to the District CM/ECF application. The mobile query interface offers a simplified user experience optimized for display on mobile devices. This interface incorporates the following functions:

- Search interface
- Party selection from party name search result list

- Case selection from case search result list based on case or party name search
- Attorney information for selected case
- Party information for selected case
- Deadlines/Hearings for selected case
- Docket entries for selected case
- PACER login

Accessing the Mobile Query

Users can access the mobile query via one of the following locations:
1. the Mobile Query link on the Query selection criteria;
2. a case link from the mobile PACER Case Locator (PCL), or;
3. the Mobile Query link on the Query results page.

Mobile Query Interface

All interfaces in the mobile query include five elements on each page:
1. back button;
2. title *CM/ECF Mobile—* COD;
3. **logout** button;
4. court home page button;
5. search field for party name or case searches.

The login screen prompts users to enter their PACER login and password. The *Client Code* field is optional. The default search screen allows users to search by case number, party name, or attorney.

Mobile Query—Login Screen

Mobile Query—Default Search Screen
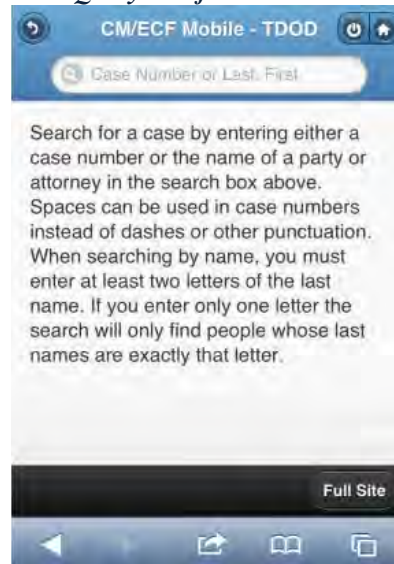
Users who wish to access the full CM/ECF site from their mobile devices can click the **Full Site** button at the bottom of each page. The **Full Site** button provides access to the standard-formatted

application interface page, equivalent to the current mobile query page. If the user clicks the **Full Site** button, the full site is set as the default for approximately twelve hours. If any specific page generates a PACER billing receipt, a summary form of the billing information is displayed in the black bar along the bottom of the page.

Mobile Query—Full Site Query Criteria Screen
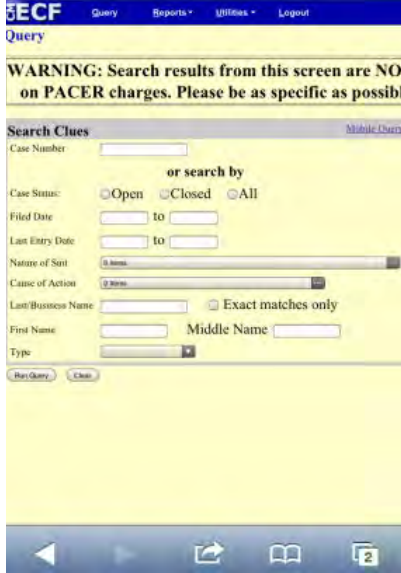
Name Searches in Mobile Query

For name searches, the required format is *Last Name, First Name*, where a comma separates the two parts. The first name is optional. When searching by name, the user must enter at least two letters of the last name. If only one letter is entered, the search will only find parties or attorneys whose last names are exactly that letter.

If a party name search returns more than one possible match based on the criteria provided, the mobile interface presents the user with a list of all matching names and requires the user to select a specific name. If more than eight results are returned on any query page (excluding the docket entries page), above the list, an on-page filter allows the user to search the results already downloaded to the browser. This does not affect PACER charges.

Search Results—Multiple Names in Results

Search Results—Using the Filter

If only one case is linked to a specific name, the case query result for that case is returned.If one name matches the initial search but is linked to multiple cases, or if a user selects a name from the result list of a multi-response search, a list of cases associated with that party is displayed. When a case is selected from this list, the case query result page is displayed.

Search Results—Single Result Returned   *Search Results—Multiple Cases in Search Results*

Case Searches in Mobile Query

Entering a numeric search term triggers a case number search; if an alphanumeric search term is entered, it triggers a party or attorney name search. If a case number search returns no results, the system automatically runs a name search using the same terms. Spaces can be used in case numbers instead of dashes or other punctuation.

The access restrictions used to search for a case are the same in the mobile query application as in the main CM/ECF application. Therefore, if users do not have access to a case, they will see the same error messages or additional information as they would if accessing the main CM/ECF application.

If a case search returns more than one possible match based on the criteria provided, the mobile interface presents the user with a list of all matching cases and requires the user to select a specific case before proceeding to thee case query result screen. When a case is selected from this list, the case query result for that specific case is displayed.

If only one case matches the case criteria provided, the case query result page is displayed.

The case number search does not generate a PACER billing receipt, since the standard query application does not bill for the case number lookup. In the mobile query interface, there is no in-line case number lookup like in the standard query interface. The interim case selection page is therefore provided to facilitate this process, but does not bill.

Case Query Results

When a search is run, the Mobile Query displays results in the case query result page. This screen presents the following information:

- case number, short title, and date filed;
- link to see attorney information in the case;
- link to see party information in the case;
- link to see deadline/hearing information in the case;
- link to show all docket entries, and the number of docket entries that will be shown;
- search icon that brings up a search box to find docket entry information that matches the text entered.

The Case Query Results screen is analogous to the full site Query result page, which does not produce a PACER billing receipt. Billing will occur based on additional selection from this page.

Case Query Result

Case Query Result – Docket Entry Text Search
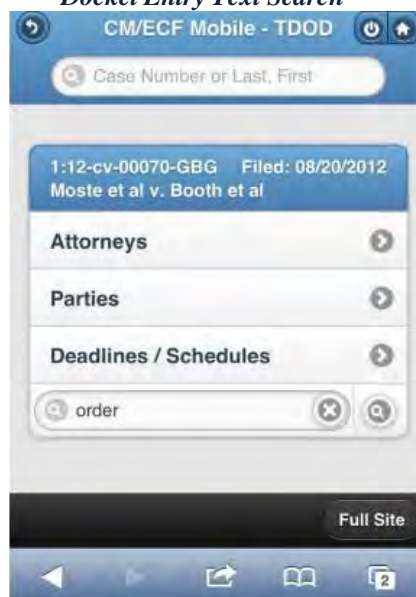
Detailed Case Information Displays

Attorneys, parties, deadlines, and docket entries are listed in similarly formatted lists that wrap to fit on small screens.

Each list header shows the case number, item listed, and the number of matches. If more than eight items appear in the list, a *Filter Items* search box at the top of the list allows the user to narrow down the list. This *Filter Items* search box is available on all case details except for docket entries. The user is billed for receiving the total data, not for using this filter to hide data already received.

Case Query Result—
Attorney Information

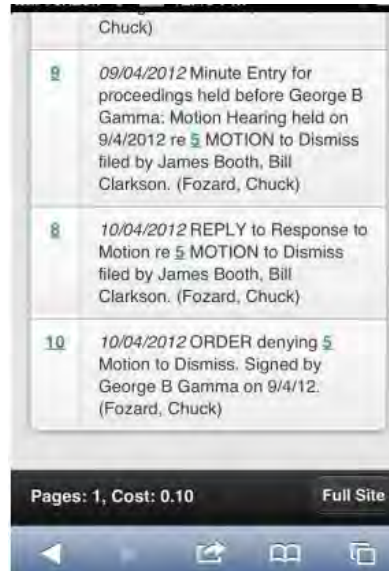*Case Query Result —*
Party Information

Case Query Result—
Deadline/Schedule Information

Case Query Result—
Docket Entries Information

Case Query Result—
Docket Entries w/Embedded Links

Case Query Result—
Docket Entries Using Text Search

The docket entry information includes document numbers, the filed date, and the docket text. For documents, the document number appears in its own cell on the left. The entire cell is clickable to make clicking the link easier on small screens. Clicking on a document takes the user to familiar CM/ECF screens to view the document. The mobile query ignores PACER billing display preferences and displays PACER receipts via the standard CM/ECF PACER interface.

Case Query Result—
Viewing a PDF

Case Query Result—
Viewing the PACER Receipt

Additions to the Court Information Page

The following information now is included or has been changed on the Court Information page:

- The threshold for large docket sheets. If a docket sheet contains over 200 docket entries, a screen with a warning message and options to include docket entries for the past week, the past 90 days, the past year, or as originally requested.

Court Information Page (Top Portion)

Helpful Links Added to Civil and Criminal Events Menus

There are two new links added to the Utilities Menu. The <u>Links to Other Courts</u> menu item points to a court links page on the PACER Service Center website, so PACER users can more easily navigate from one court to another without having to access the PACER Service Center website outside of CM/ECF. The <u>PACER Case Locator (National Index)</u> link points to the PACER Case Locator on the PACER Service Center website. Users will have to enter login information when clicking on these links. PACER charges will be incurred for users running reports and accessing documents or docket sheets.

Due to security restrictions on the Public Access Terminals that prevent access to external websites, these links will not be available on the court's public terminals.