

# What's New in Electronic Filing New Features for Attorneys CM/ECF Version 3.1



# Table of Contents

Cascading Menus .....	1
Searching for a Case Number .....	1
Docketing	
Search: Menus and Events .....	2
Displaying Document Paths .....	4
Notice of Electronic Filing (NEF) ‘Free Look’ .....	5
PACER Billing Scenarios for Attorneys .....	5
Reports	
Calendar Events Report .....	6
Civil Cases Report .....	6
Criminal Cases Report .....	6
Docket Report .....	6
All Documents for a single Docket Entry .....	6
All Documents for Multiple Docket Entries .....	7
To View .....	8
To Download .....	8

## Cascading Menus

Much like the Microsoft Windows Start menu, the new cascading menu system allows users to navigate from one CM/ECF menu item to another by hovering over the main blue menu bar and selecting specific menu items from the cascading menus. (The legacy static menu functionality is preserved, and can be accessed with a click on the blue menu bar item.)

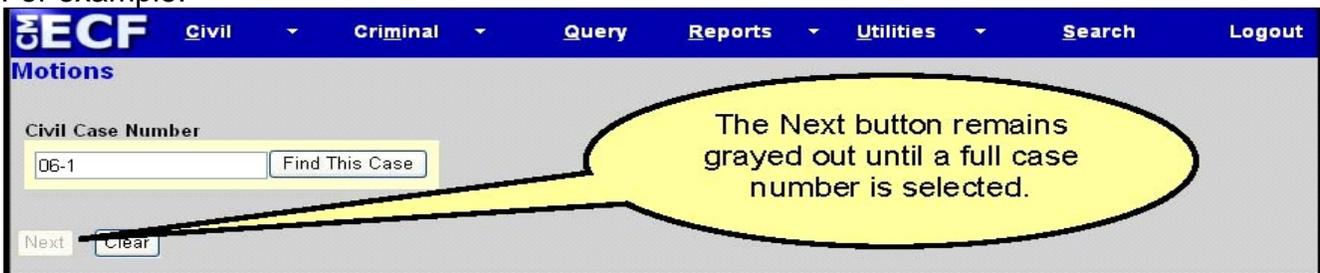
### Sample View of the Utilities Cascading Menu



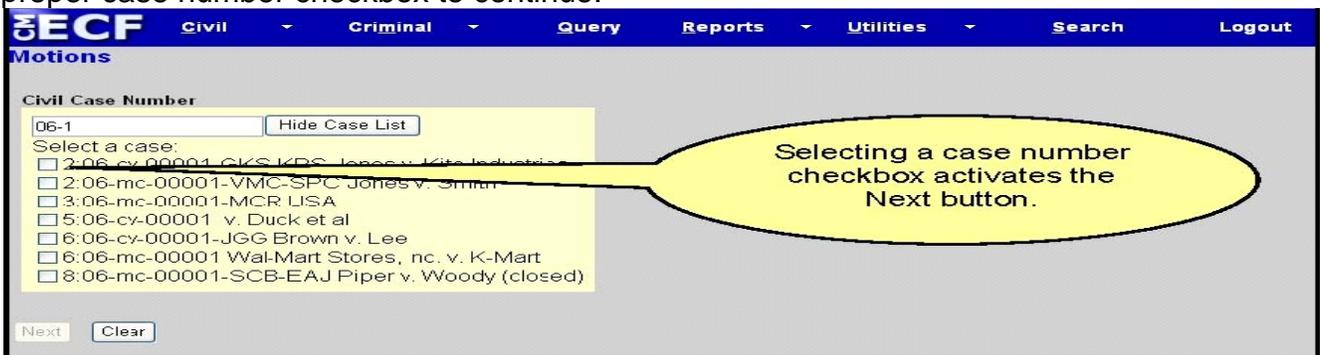
Notice the Civil, Criminal, Reports, and Utilities selections have a down arrow next to them, which indicates the presence of a sub-menu. To use the keyboard to display a sub-menu, press and hold the **ALT** key together with the underlined letter in the menu name (ALT + C.)

## Searching for a Case number

Almost every screen with a Case Number look-up screen has been modified to reduce the number of screens you must navigate to find a full case number. After a partial case number is entered, the screen shown on the next page will automatically display. Once a partial case number is entered, click the 'Find This Case' button to begin the case number look-up process. For example:

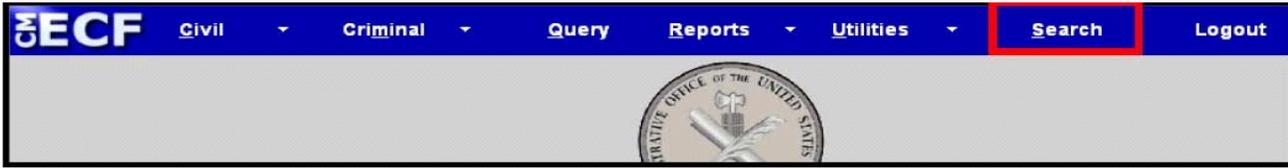


When only a portion of a case number is entered, all possible case number matches will display on the same screen as the initial look-up field. Once the full case number is located, select the proper case number checkbox to continue.



## Docketing: Search: Menus and Events

A search option has been added to the Main Menu.

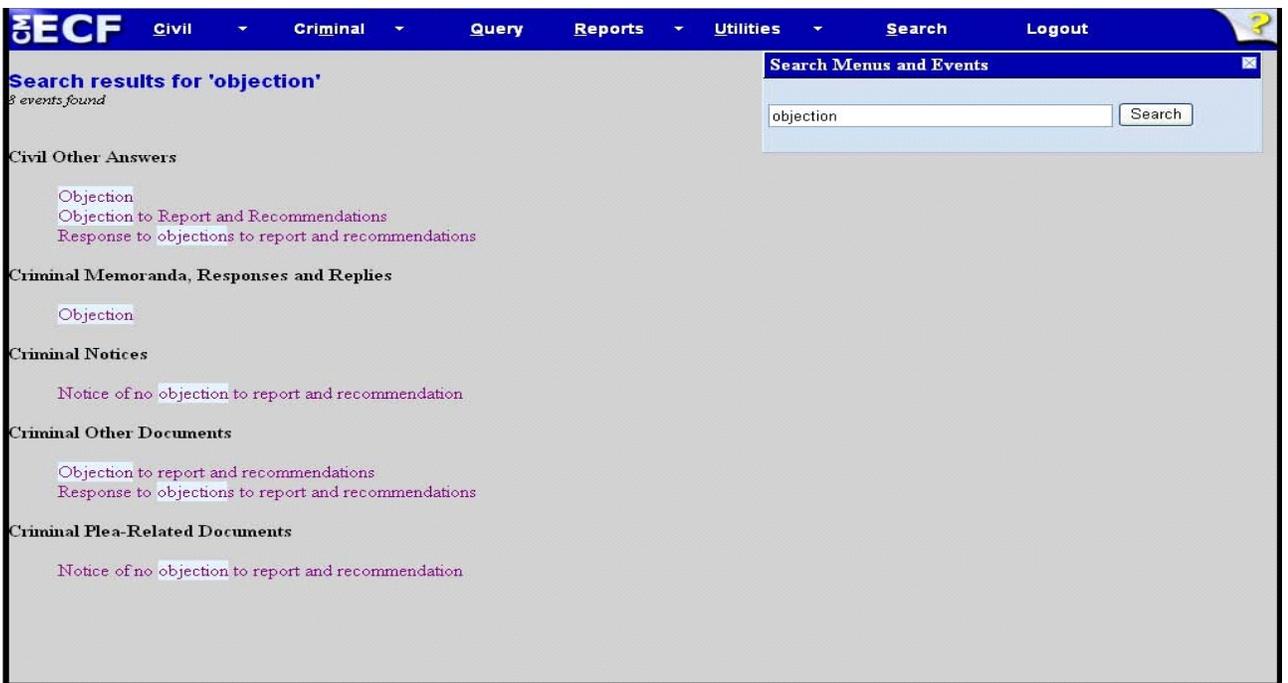


Clicking on Search displays the Search Menus and Events window:



In this window enter all or part of the name of the event to be found. For example, to find an Objection to Report and Recommendations event, type "objection" in the box and click the Search button.

CM/ECF will display a list of events which contain the entered word or string of words and the menu on which the event can be found:

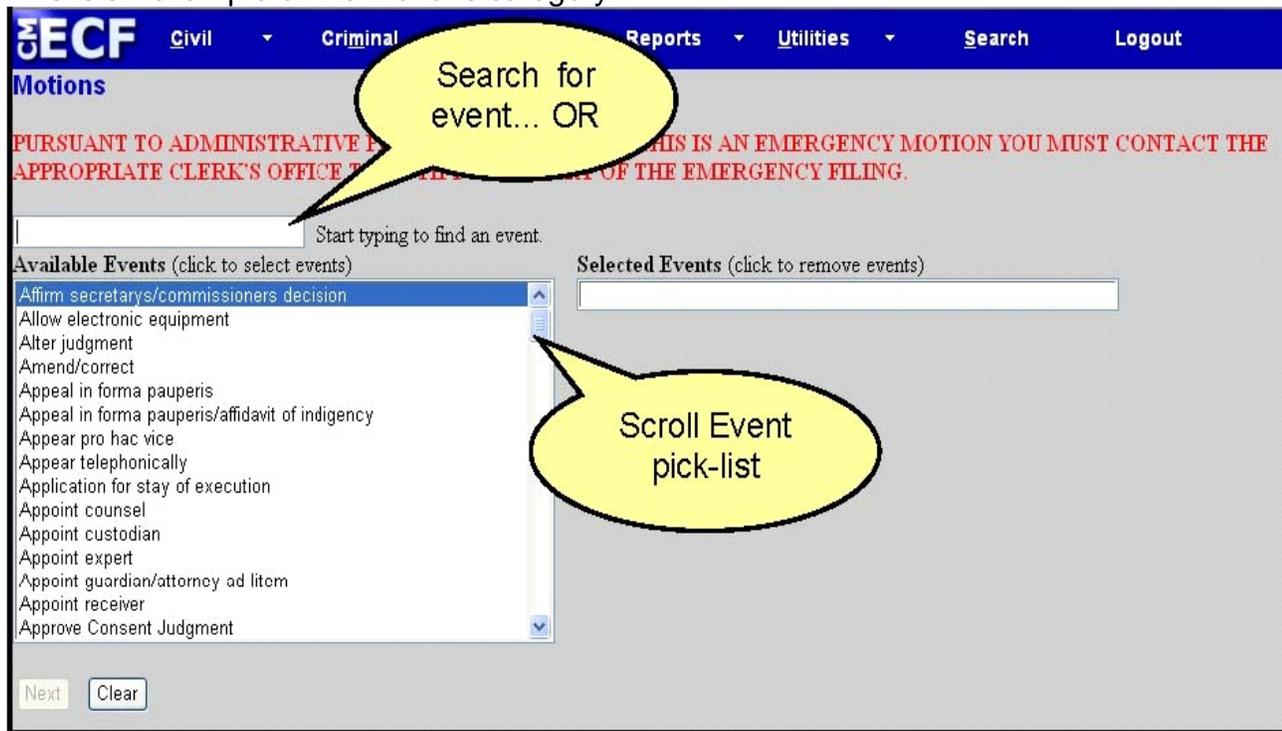


To file the document, simply click on the appropriate event.

## Docket Event Search

With the new docket event search functionality, users can enter one or more characters in the docket event search field during docketing to execute more precise searches when selecting event subtypes to docket. If the user enters characters in the text field, the list of events is filtered to display those events that match that character pattern.

This is an example of the Motions category.



To find an event within the category, either scroll down the list or, in the search box, type all or part of a word from the name of the event. **Note:** The search will begin with the first letter typed; therefore, the search function does not accommodate the use of wildcard characters.

For example, to locate the Dismiss event, type “dism” in the search box. CM/ECF will display a list of events which have a word starting with the letters entered. Click on the desired event to select it from the list.



The selected event will be added to the Selected Events box, and the list of available events will again be displayed.

Continue with event selection until all necessary events have been added to the Selected Events box. If an incorrect event is selected, click on the event to remove it from the list.

The screenshot shows the ECF Motions interface. At the top, there is a navigation bar with the ECF logo and menu items: Civil, Criminal, Query, Reports, Utilities, Search, and Logout. Below the navigation bar, the page title is "Motions". A red warning message reads: "PURSUANT TO ADMINISTRATIVE PROCEDURE II(A)(1)(b), IF THIS IS AN EMERGENCY MOTION YOU MUST CONTACT THE APPROPRIATE CLERK'S OFFICE TO NOTIFY THE COURT OF THE EMERGENCY FILING." Below the warning, there is a search box with the text "Start typing to find another event." The interface is divided into two main sections: "Available Events (click to select events)" and "Selected Events (click to remove events)". The "Available Events" list includes: Affirm secretaries/commissioners decision, Allow electronic equipment, Alter judgment, Amend/correct, Appeal in forma pauperis, Appeal in forma pauperis/affidavit of indigency, Appear pro hac vice, Appear telephonically, Application for stay of execution, Appoint counsel, Appoint custodian, Appoint expert, Appoint guardian/attorney ad litem, Appoint receiver, and Approve Consent Judgment. The "Selected Events" list includes: Dismiss and Summary judgment. At the bottom of the interface, there are "Next" and "Clear" buttons.

The order in which events are added to the *Selected Events* list is the order in which they will be docketed, and the order in which they will appear in the docket text. The mouse or the keyboard can be used to search for and select events.

Once all of the necessary events have been selected, click the [Next] button to continue.

## Docketing: Displaying Document Paths

The full path and filename for any uploaded documents will be displayed on the Final Docket Text screen during docketing. This allows users to confirm that the proper documents have been uploaded for the docket entry

## Notice of Electronic Filing (NEF) ‘Free Look’

Beginning with Release 3.1 only case participants will receive one free look at documents that are accessed via the Notice of Electronic Filing (NEF). Text on the NEF and on the E-mail Information screen will explain the new functionality.

Judicial Conference of the United States policy permits attorneys of record and parties in a case (including pro se litigants) to receive one free electronic copy of all documents filed electronically, if receipt is required by law or directed by the filer. PACER access fees apply to all other users. To avoid later charges, download a copy of each document during this first viewing.

## PACER Billing Scenarios for Attorneys

When a PACER user accesses a document for the first time via the Notice of Electronic Filing, he/she will not incur fees for accessing the newly filed document, but access to any hyperlinked document from within the original document will incur a fee.

When a PACER user accesses a document after the first look, or accesses it from a docket sheet, he/she will be charged for the original document and any documents displayed when using a hyperlink.

If documents filed in the same transaction contain hyperlinks to each other, the free look will be available from the document number hyperlink displayed on the NEF document submenu, not from the hyperlinks in the documents themselves. The following note was added to the document submenu: **"To view the main document and its attachments without incurring a PACER fee, click on the hyperlinks displayed on this menu. You will incur a PACER fee to view CM/ECF documents from hyperlinks within the documents."**

If a PACER user does not have his/her PACER login already linked to his/her ECF login, he/she will be prompted for the PACER login for the first document he/she tries to view.

## Reports

### Calendar Events Report

Users now can choose whether docket text is included in the report output for the Calendar Events Report

### Civil Cases Report

Users now can run the Civil Cases Report based on jurisdiction code.

### Criminal Cases Report

Users now can run the Criminal Cases Report based on citation code.

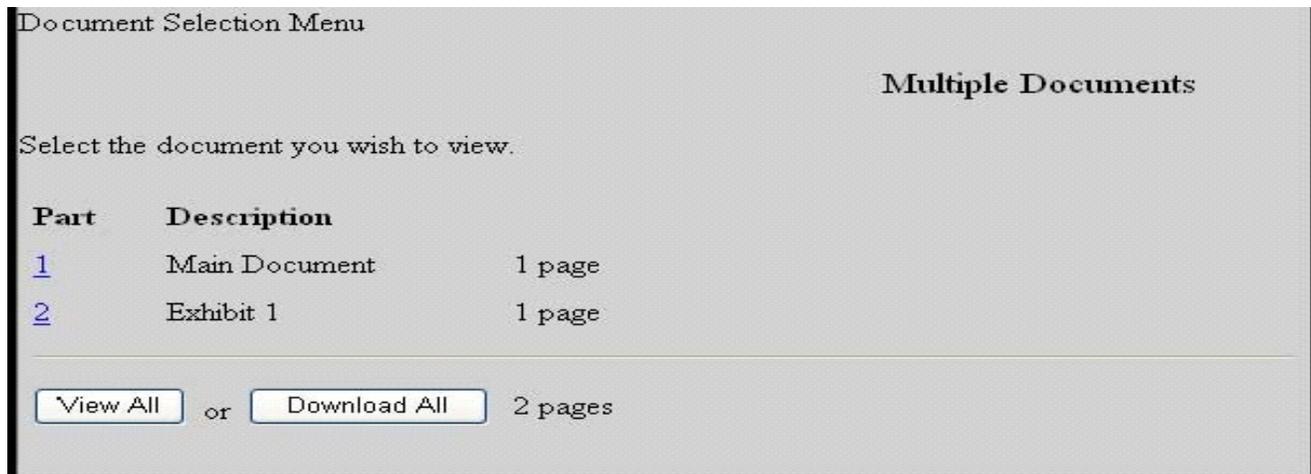
### Docket Report

Similar to PDF document headers, configurable headers are available for the new PDF version of the Docket Report. Users now have the option of running the Docket Report in HTML format (unpaginated) or PDF format (paginated.)

Several improvements allow users to easily view and print documents and docket sheets. Users can view, print, or download all of the documents for multiple docket entries and view, print, or download the document and all attachments for a single docket entry

### Viewing and/or Downloading All Documents for a Single Docket Entry

Users now can view all of the documents for a single docket entry at the same time. If the user clicks on a document number hyperlink (e.g., from the Docket Report or the Docket Activity Report), two new buttons appear at the bottom of the Document Selection Menu screen: **View All** and **Download All**.



If the user clicks **View All**, a confirmation screen is displayed with multiple receipts (one per document), the total billable pages, and the total cost. If the user clicks **View Document**, the main document and all of the PDF attachments for the docket entry are combined into a single PDF and displayed on the screen. The user may print the documents from the screen

There is a limit to the size of the file that is created when combining the main document and all of the attachments for the docket entry into one single PDF. This file size limit is listed on the Court Information Report on the Utilities menu. If the size of the combined PDF would exceed this limit, the aggregated file is not created; the user can still view the documents individually. The ability to view and/or download all of the documents for a single docket entry is not available to public terminal users.

### Viewing and/or Downloading All Documents for Multiple Docket Entries

Users now can view and print all of the documents for multiple docket entries at the same time by clicking the new *View multiple documents* checkbox on the Docket Report selection criteria screen. If the user submits the screen with the *View multiple documents* option selected, the Docket Report output will be in HTML format and will include a new column between the document number column and the docket text column, labeled *Select*. For each docket entry with a document, a checkbox appears in the *Select* column. The user can select the docket entries for which the documents should be combined into a single PDF.

Select the *View multiple documents* checkbox and click [Run Report.]

**Docket Sheet**

Case number

Filed  to

Entered

Documents  to

**Include:**

- Parties and counsel
- Terminated parties
- List of member cases
- Restricted entries
- Links to Notices of Electronic Filing

**Document options:**

- Include headers when displaying PDF documents
- View multiple documents**
- Create Record on Appeal

**Abridged docket report:**

- Create abridged docket report

**Format:**

- HTML (unpaginated)
- PDF (paginated)

Sort by

Make these options my default. Schedule this to run

The docket sheet will include check-boxes. Checkmark those documents desired.

Date Filed	#	Select all / clear	Docket Text
01/03/2006	<a href="#">1</a>	<input type="checkbox"/>	COMPLAINT against Kite Industries , jury demand filed by George Jones (SMS, ) (Entered: 01/03/2006)
01/03/2006	<a href="#">2</a>	<input type="checkbox"/>	ORDER transferring case to Jacksonville. New Case Number is 3:05-cv-1309-J-25MMH. Signed by Judge G. Kendall Sharp on 1/3/2006. (SMS, ) (Entered: 01/03/2006)
03/28/2006	<a href="#">3</a>	<input type="checkbox"/>	ORDER directing administrative closure Signed by Judge G. Kendall Sharp on 3/28/2006. (kma) (Entered: 03/28/2006)
05/30/2007	<a href="#">4</a>	<input type="checkbox"/>	NOTICE testing link in pdf by George Jones re <a href="#">1</a> Complaint (DR) (Entered: 05/30/2007)

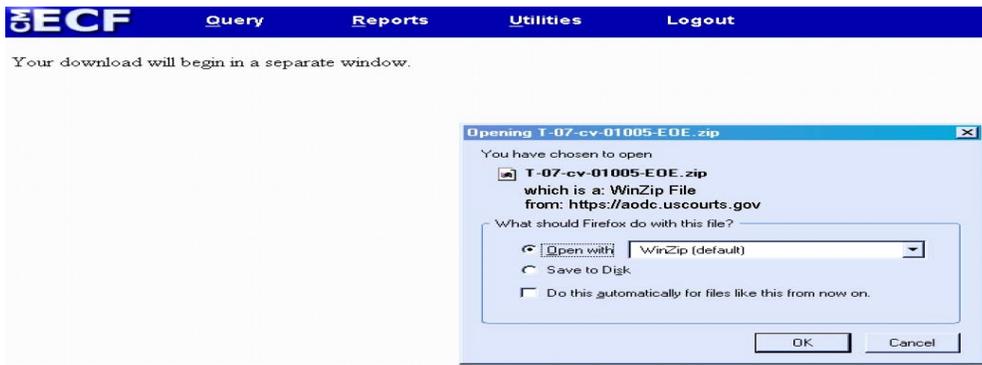
or

## To View

Click [View Selected]. The documents will open as a single PDF.

## To Download

If you click **Download All** or **Download Selected**, a confirmation screen is displayed with multiple receipts (one per document), the total billable pages, and the total cost. If you click **Download Documents** on the confirmation screen, the selected documents are combined in a ZIP file and a dialogue box is displayed for you to select a destination directory for the ZIP file (the screen is similar to the one below). Once you select a destination directory and filename, the ZIP file is saved in the specified location. The ZIP file is stored in a format that results in separate component files upon decompression.



Depending on your browser settings you may get a message that the site was blocked from downloading the files to your computer . . . If you get this message, click select *Download File*.



On the File Download dialog box, click [Save.] Find a location to save the file, and if you want, rename it. Click [Save.]

