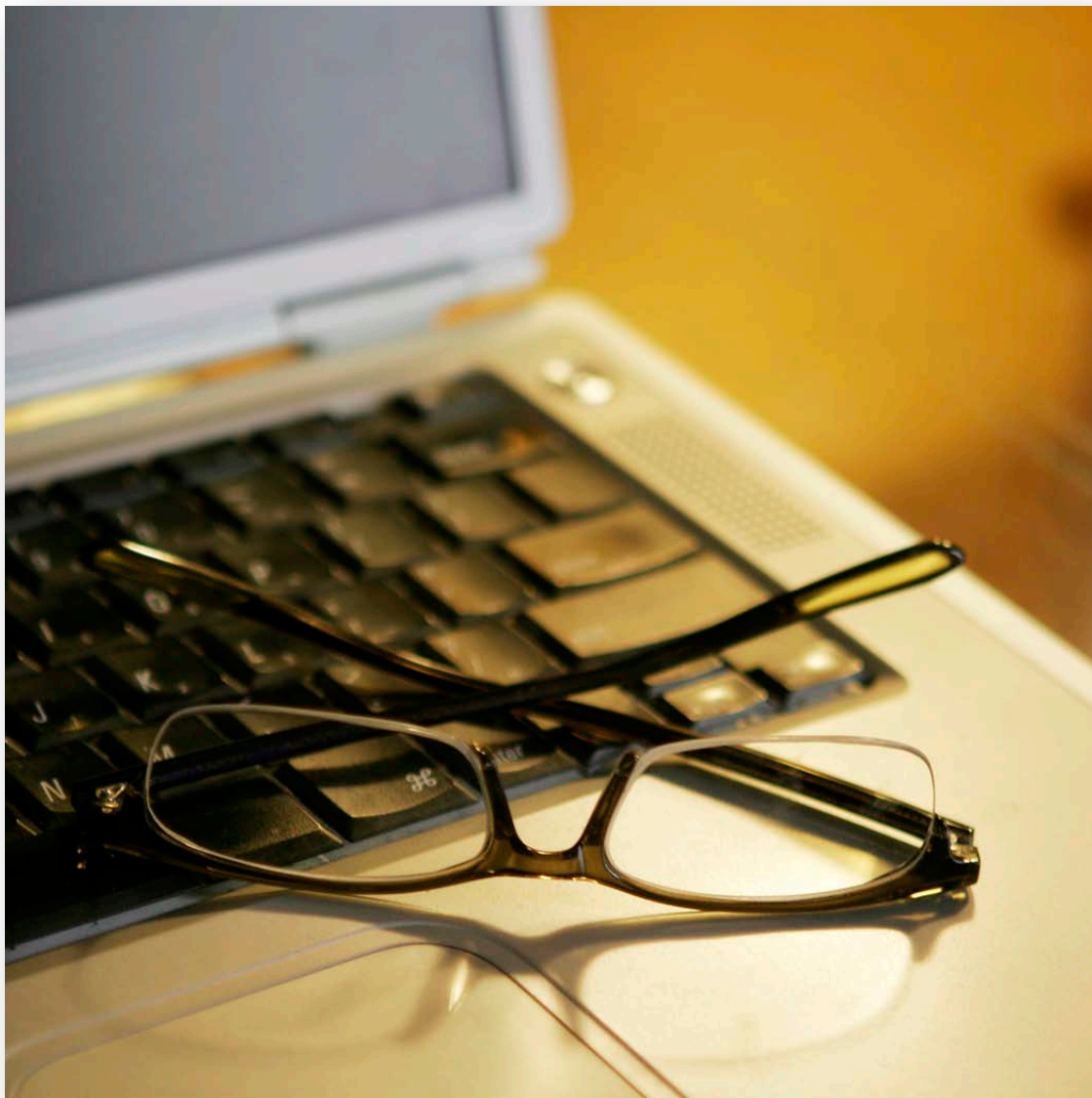


CM/ECF Version 4.1.1

A Guide to the New Features for Attorneys and Law Firm Staff



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DOCKETING CHANGES

The procedure for docketing has been redesigned to process parties more efficiently, improve speed, and enhance the user's experience.

Selecting the Filer

A new case participant tree is now displayed in the left pane during docketing so users can readily see all case participants during the process of selecting the filers. The tree is displayed for reference purposes during docketing. All party selections will be made in the right pane. If a new participant is added during the docketing process, then icon controls will be visible in the tree for the new participant only. Please see the description for each of the icons which may appear in the participant tree on page three.

Select the Filer Screen

Responses and Replies
4:07-cv-00001-NKL Smith v. USA

Pick Filer

[Collapse All](#) [Expand All](#)

- John Smith pet
 - Attorney
 - Elise Barker
- USA res
 - Attorney
 - Robin L Jones

Select the filer.

Select the Party:

- Smith, John [pet]
- USA, [res]




Next **Clear** **New Filer**

From the right side of the screen in the **Select the Party window**, click the name of the party for whom you are filing the document, or, if the **Select a Group** option is presented and you represent all defendants or plaintiffs you may select a group by clicking in the circle next to the group.

To add a new party, the user should click the **New Filer** button located in the right pane. A new search screen will be displayed from which the user then can search for and add a new party.

Icons

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

Icon	Description
	Delete this party from the case.
	Add new alias or corporate parent.
	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.

Additionally, the + and – icons for each branch expand or collapse the branch, respectively.

ADDING DOCUMENTS AND ATTACHMENTS

Release 4.1.1 includes modifications to the way documents and attachments are added and handled in CM/ECF. The changes include a new single screen for document and attachment uploading during docketing, and an improvement in the way attachments are numbered on the Document Selection screen.

The process of adding a main document and attachments during docketing has been streamlined to only require one screen, shown below in its initial state.

Document Upload Screen – Initial State

Motions
[4:08-cv-00007 Baker v. Casey](#)
Select the pdf document and any attachments.

Main Document

Attachments	Category	Description
1. <input type="text"/>	<input type="text"/>	<input type="text"/>

After browsing and selecting the appropriate Main Document, the user should click the **Browse** button in the *Attachments* section to add the first attachment. Once a PDF document is selected, the user **must** select a Category or enter a Description to further describe the

attachment. As the process of adding an attachment is completed, a new row will appear so the user can then add a second attachment if necessary. Additional rows will be added as needed.

Document Upload Screen – After Selecting a Main Document and Two Attachments

Motions
[4:08-cv-00007 Baker v. Casey](#)
Select the pdf document and any attachments.

Main Document
I:\ECF Docs\Robin\Motion.pdf

Attachments	Category	Description
1. I:\ECF Docs\Robin\Exhibit 1.pdf <input type="button" value="Browse..."/>	Exhibit	1 <input type="button" value="Remove"/>
2. I:\ECF Docs\Robin\Exhibit 2.pdf <input type="button" value="Browse..."/>	Exhibit	2 <input type="button" value="Remove"/>
3. <input type="button" value="Browse..."/>		

If only two attachments are to be added, the user should leave the fields in the third row blank and then click **Next**. If additional attachments are to be added, the user should click **Browse** for each attachment and then add the document.

If an attachment is to be removed, the user should click **Remove**. If, for example, Attachment 1 is removed and there is a second attachment, Attachment 2 would become Attachment 1, etc.

If an attachment file is incorrect and needs to be replaced, the user should click **Browse** again for the attachment and load a different document. If the user clicks the **Clear** button after adding documents and attachments, the screen will be returned to the initial state.

Document and Attachment Numbering

When viewing a document with attachments, the document selection screen was modified so that the attachments are numbered beginning with 1. This way, the attachment numbers are consistent everywhere they appear (e.g., docket text, the document selection screen). Previous versions of the software listed the Main Document as Part 1 and any attachments followed in numerical order causing Exhibit 1 to be Attachment 2.

Document Selection Menu
Select the document you wish to view.

Document Number: [5](#)

1 page

6 kb

Attachment	Description		
1	Exhibit 1	1 page	6 kb
2	Exhibit 2	1 page	6 kb

or 3 pages 18 kb

Also, the file sizes and the total size of all of the documents for a docket entry are displayed on the document selection screen.

DOCKET REPORT

Combined Docket Report – Criminal Cases

Users can now 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.

Docket Sheet Case Number Selection

Docket Sheet

Case number:

Select a case:

- ☐ 4:08-cr-00001-DW USA v. Contreras et al
- ☐ 4:08-cr-00001-DW-1 Eric Contreras
- ☒ 4:08-cr-00001-DW-2 Nick Salazar
- ☒ 4:08-cr-00001-DW-3 Geraldine Garcia
- ☐ 4:08-cr-00001-DW-4 Jimmie D. Lambert (closed 11/17/2008)

☒ View Combined Docket Report

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.

Large Docket Report Warning

Depending on the selection criteria entered by the user, it is possible for a large amount of data to be included in the report output. A warning with additional options now displays when the report output includes more than 200 docket entries. Users are presented with options to help narrow the search to include docket entries for the past week, the past 90 days, the past year, or as initially requested.

Large Docket Report Warning - Additional Selection Options

Docket Sheet

The report may take a long time to run because this case has many docket entries. You can go back and modify the selection criteria or select one of the following options.

Include docket entries:

- ☒ for the past week
- ☐ for the past 90 days
- ☐ for the past year
- ☐ as initially requested

MAINTAIN YOUR EMAIL MODIFICATIONS

The Email Information screen in Maintain Your Account 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 person account to another and/or from one delivery method to another is now allowed.

Email Information Screen – Initial Screen

Email Information for John Jones	
Registered e-mail addresses	Configuration options
<p>Primary e-mail address: john_jones@emailaddress.com</p> <p>Secondary e-mail addresses: add new e-mail address</p> <p>Return to Person Information Screen Clear</p>	<p>Select an e-mail address to configure.</p>

The initial Email Information screen is divided into two panes. In the left pane, the primary email address and secondary email addresses, if any, appear as hyperlinks.

When the user clicks the primary or secondary email address hyperlink in the left pane, configuration options appear under the email address in the right pane.

Email Information Screen – Configuration Options

Email Information for John Jones	
Registered e-mail addresses	Configuration options
<p>Primary e-mail address: john_jones@emailaddress.com</p> <p>Secondary e-mail addresses: add new e-mail address</p> <p>Return to Person Information Screen Clear</p>	<p><input type="text" value="john_jones@emailaddress.com"/></p> <p>Should this e-mail address receive notices? <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>How should notices be sent to this e-mail address? <input checked="" type="radio"/> Per Filing <input type="radio"/> Summary Report</p> <p>In what format should notices be sent to this e-mail address? <input checked="" type="radio"/> HTML <input type="radio"/> Text</p> <p>Should this e-mail address receive general announcement notices from this court? <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>Show all cases for this e-mail address <small>(Copy case lists from here)</small></p> <hr/> <p>Case-specific options</p> <p>Add additional cases for noticing</p> <p><input type="text"/></p> <p>These cases will send notice <i>per filing</i>. (default method)</p> <p>4:09-cv-00001-DGK Jones v. Smith (Closed on 01/13/2009) - Representing Anne Smith</p> <p>Remove selected cases Change selected cases to notice as a summary report</p> <p>These cases will send notice <i>as a summary report</i>. (alternate method)</p> <p><input type="text"/></p> <p>Remove selected cases Change selected cases to notice per filing</p>

Following is an explanation of each of the options that appear above:

Option	Description
Should this e-mail address receive notices?	For the primary e-mail address, the default is Yes . To disable the primary address, select No . If set to No , the primary e-mail address will not receive Notices of Electronic Filings (NEFs). We recommend that this setting always be set to Yes .
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 e-mail will be sent for each individual NEF. If Summary Report , one daily summary e-mail 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 e-mail will include the message <i>"no transactions found for this time period"</i> if no activity occurs in the cases for which the user is configured to receive summary notices. If No , then no e-mail 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 e-mails – either HTML or Text . HTML is the preferred format.
Should this email receive general announcements from this court?	This option allows the user to opt out of receiving general announcements sent from the court. These announcements often contain important information about system outages and rule updates, therefore, it is recommended that this selection be set to "yes."
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.
Add additional cases for noticing	Allows users to add cases in which they are not an active participant, but would like to receive NEFs. There is no free look associated with these Notices.
These cases will send notice <i>per filing. (default method)</i>	An e-mail will be sent for each individual NEF.
These cases will send notice <i>as a summary report. (alternate method)</i>	One daily summary e-mail notice that lists all the filings for that day will be sent.

Miscellaneous

Daily Summary Report - The Daily Summary Report now sends notice indicating "**no transactions found for this time period**" to all summary recipients who did not receive a summary NEF from the regular summary report processing. This applies to anyone with summary delivery method preference who has opted into the function via a new control accessible via the E-mail Information screen.

QUERY

The Query screen was modified to provide the following options to allow for more refined searching:

- The user now has the ability to search a name in combination with case status, filed date, last entry date, Nature of Suit or Cause of Action.
- A *Cause of Action* select list was added.

Query Screen

Queries now can be run by entering a case number or any combination of the following:

The screenshot shows a web form titled "Search Clues" with a yellow background. It contains several input fields and a list of search criteria. The "Case Number" field contains "4:08-cv-1". Below it, there are radio buttons for "Case Status" (Open, Closed, All). The "Filed Date" and "Last Entry Date" fields are followed by "to" fields. The "Nature of Suit" field is a dropdown menu with options: "0 (zero)", "110 (Insurance)", and "120 (Contract Marine)". The "Cause of Action" field is a dropdown menu with options: "0 (No cause code entered)", "00:0000 (00:0000 Cause Code Unknown)", and "02:0431 (02:431 Fed. Election Commission: Failure Enforce C)". The "Last/Business Name" field is followed by a text input field with the example "(Examples: Desoto, Des*t)". The "First Name" and "Middle Name" fields are followed by text input fields. The "Type" field is a dropdown menu, and the "Prisoner ID" field is a text input field.

- Case Status
- Cause of Action
- Type
- Filed Date
- Last/Business Name
- Prisoner ID
- Last Entry Date
- First Name
- Nature of Suit
- Middle Name