CM/ECF VERSION 4.0 ENHANCEMENTS
FOR ATTORNEY E-FILERS AND PACER USERS

The changes (explained in further detail below) will affect all Attorney E-Filers and PACER users:

1. **PACER (Public Access to Court Electronic Records) Enhancements**

   ❖ Combined Docket Report for Criminal Defendants

   ❖ Query screen-additional filter option added

2. **CM/ECF (Case Management/Electronic Case Filing) Enhancements**

   ❖ New User Interface Components for:

   - Docketing when selecting filers and attorneys

   - Adding Documents and Attachments

   - Configuring Email Information Screen

   ❖ General Announcement Emails

   ❖ RSS (Really Simple Syndication) Feed available for Public Users

PACER Enhancements

Combined Docket Report for Criminal Defendants

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. A Cause of Action select list was added.

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

- Case Status
- Filed Date
- Last Entry Date
- Nature of Suit
- Cause of Action

- Last/Business Name
- First Name
- Middle Name
- Type

CM/ECF Enhancements

Docketing/Selecting Filers and Attorneys

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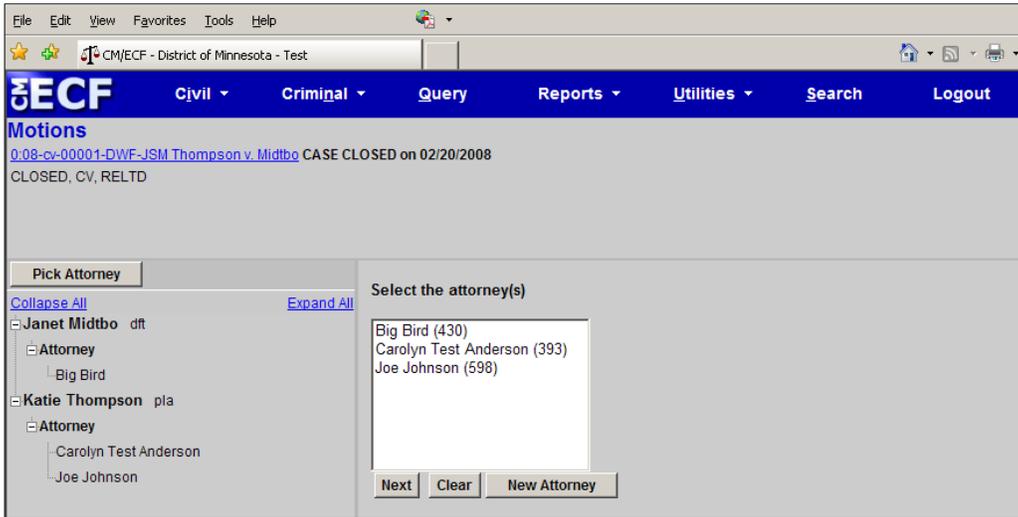
The Select a Filer screen displays with the existing case participants in the participant tree on the left side of the screen.

To add a new party (civil only), the user should click the New Filer button. This will call the search screen and the user then can search for and add a new party. When a new party is added, he/she 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.
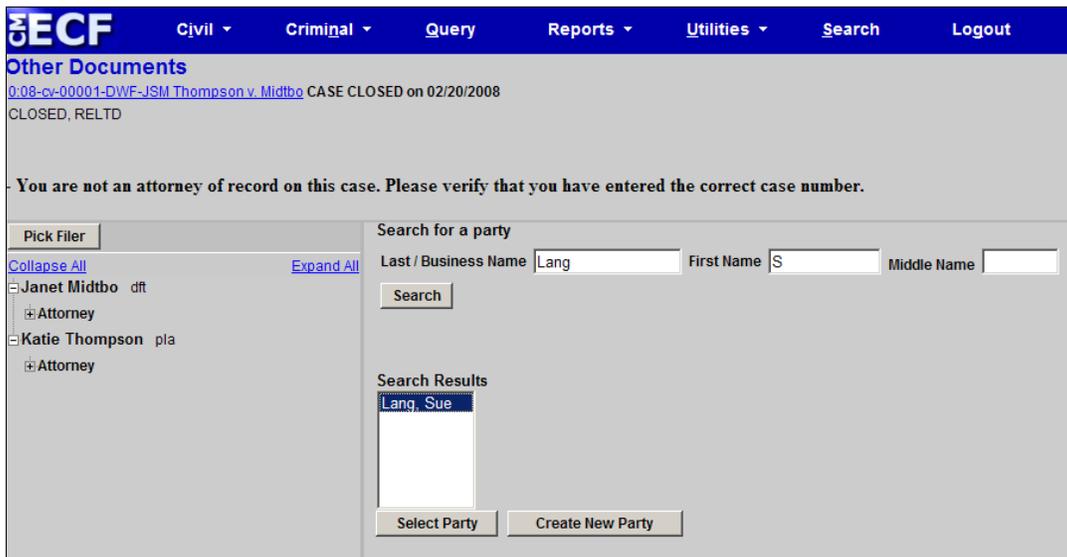
Parties that are added to civil cases during docketing will have control icons in the participant tree so the user can add aliases, corporate parents, etc. for the party during this process.

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.

Selecting Filers in a Large Case (Civil Only)

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.

Adding Documents and Attachments

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.

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.

If only two attachments should be added, the user should leave the fields in the third row blank and then click Next.

If an attachment should 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.

Attachment Category and Description

If a user does not select/provide adequate information for each attachment, an error message will prompt you to do so.

Document and Attachment Numbering

The document selection screen was modified to include the main document number, and 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).

Also, the file sizes and the total size of all of the documents for a docket entry are displayed on the document selection screen when viewing a document via a Notice of Electronic Filing or when viewing a document via the docket report.

Email Information Screen

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.

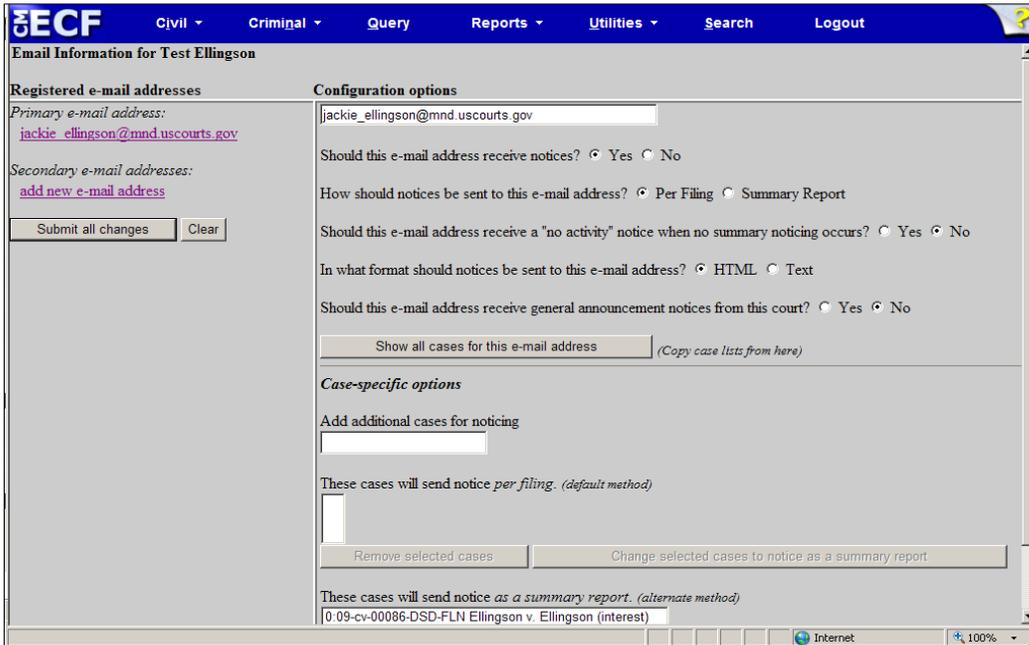The initial Email Information screen is divided into two sides. On the left side, there are two add new e-mail address hyperlinks, one for the primary email address and one for the secondary email addresses. When the user clicks the "add new e-mail address" hyperlink for the primary email address, a text field appears on the right side of the screen. The user should enter his/her e-mail address in this field.

Once the user enters a complete email address, configuration options appear on the right side of the screen. To access the configuration options for existing email addresses (listed on the left side of the screen), the user should click on the email address on the left.

OPTION	DESCRIPTION
Should this e-mail address receive notices?	For the primary email address, the default is Yes. To disable the primary 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: Should this e-mail address receive a "no activity" notice when no summary noticing occurs? 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, enter the case number(s) in the **Add additional cases for noticing** text field and then either click Enter or Find This Case.

After selecting the appropriate case(s), click Add case(s). 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, the user should click the case number(s) in the primary list and then click the ***Change selected cases to notice as a summary report*** button (if summary noticing is the default method, then this button will be labeled Change selected cases to notice per filing). The cases will be moved to the alternate method list.

To delete cases from the default method list or the alternate method list, select the case(s) and then click the ***Remove selected cases*** button.

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 at the bottom of the Configuration Options section of the screen. The user can answer yes or no.

It is recommended that the answer is yes unless the user only wants to be notified in specific cases.

To remove an email address, the user should 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. The user should remove the email address from the text field.

If the user wants to change the email address to a different one, the user should immediately type the new address in the text field. If the user clicks 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.

General Announcement Emails

Courts now can send general announcement email messages to users with email addresses in CM/ECF. Attorneys will automatically be configured to receive announcements. Attorneys can opt out by modifying their email settings under Maintain Your Account.

Secondary email addresses can also receive announcements via email by selecting the option under Maintain Your Account.

Note: the court can force the email announcement to be sent to individuals who have opted out in situations where vital information needs to be distributed.

RSS (Really Simple Syndication) Feed for Public Users

To allow for easier public access to specific data, CM/ECF will now provides users with an RSS feed for notification with links to docket sheets and documents.

Case-specific RSS feeds will not be included. Instead, the feeds will be based on event types for motions and orders and can be filtered by Judge.

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 any order or motion events for criminal and civil included in the feed. The feed includes the last 100 entries of any order and motion 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.

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.