



United States District Court
Southern District of West Virginia

District CM/ECF version 4.0.2 Attorney User Release Notes

District CM/ECF Version 4.0 includes numerous modifications specifically designed to streamline e-filing. Modifications include:

- A single screen to add a document and its attachments;
- Improvements to main document and attachment numbering;
- A query screen with refined search capabilities;
- Enhanced Notices of Electronic Filing;
- Additional criminal docket report options; and
- A redesigned user interface screen.

Adding Documents and Attachments

The process of adding a main document and attachments during docketing has been streamlined to require only one screen, shown below in its default state as Figure 1.A.

Figure 1.A. Document Upload Screen – Initial State

Date document filed (mandatory) 7/31/2008 <input type="button" value="Calendar"/>		
Select the pdf document and any attachments.		
Main Document <input type="text"/> <input type="button" value="Browse..."/>		
Attachments	Category	Description
1. <input type="text"/> <input type="button" value="Browse..."/>	<input type="text"/> <input type="button" value="v"/>	<input type="text"/>
<input type="button" value="Next"/> <input type="button" value="Clear"/>		

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.

Figure 1.B. Document Upload Screen – After Selecting a Main Document and Two Attachments

Date document filed (mandatory) 7/31/2008 <input type="button" value="Calendar"/>		
Select the pdf document and any attachments.		
Main Document C:\Documents and Settings\gibson\My <input type="button" value="Browse..."/>		
Attachments	Category	Description
1. C:\Documents and Settings\gibson\My <input type="button" value="Browse..."/>	Appendix <input type="button" value="v"/>	<input type="text"/> <input type="button" value="Remove"/>
2. C:\Documents and Settings\gibson\Des <input type="button" value="Browse..."/>	<input type="text"/> <input type="button" value="v"/>	Exhibit A <input type="button" value="Remove"/>
3. <input type="text"/> <input type="button" value="Browse..."/>	<input type="text"/> <input type="button" value="v"/>	<input type="text"/>
<input type="button" value="Next"/> <input type="button" value="Clear"/>		

If only two attachments should be added, the user should leave the fields in the third row blank and then click the **Next** button. If additional attachments should be added, the user should click the **Browse** button for each attachment and then add the document. An unlimited number of documents may be added, provided that each is under the Court's 10.0 MB maximum PDF file size

If an attachment should be removed, the user should click the **Remove** button. 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 the **Browse** button again to search for the correct attachment and then add the document.

The default state for the document upload screen is shown in Figure 1.A above. If the user clicks the **Clear** button after adding documents and attachments, all fields will be cleared and 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. The attachment numbers are now consistent everywhere they appear (e.g., docket text, the document selection screen, etc.). Also, the file sizes and the total size of all of the documents for a docket entry are displayed on the document selection screen.

Figure 2. 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
<hr/>			
<input type="button" value="View All"/>	or	<input type="button" value="Download All"/>	5 pages 172 kb

IMPORTANT

After installing Release 4.0, attachment numbers will be modified to begin with 1 for each docket entry that has attachments. 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 to Release 4.0, the attachment numbers would be different in the printed documents than in the CM/ECF system after the upgrade.

Query

The Query screen was modified to provide additional options to allow for more refined searching. The modifications include:

- 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.

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

Figure 3. Query Selection Criteria Screen

Query

Search Clues

Case Number

or search by

Case Status: Open Closed All

Filed Date to

Last Entry Date to

Nature of Suit
0 (zero)
110 (Insurance)
120 (Contract: Marine)

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

Last/Business Name (Examples: Desoto, Des*t)

First Name Middle Name

Type

Notice of Electronic Filing (NEF)

Terminated pro se parties who should not be noticed are no longer displayed on the NEF.

Attorneys will be listed only once in the body of the NEF. Also, only a single copy of an NEF will be sent to an attorney, regardless of the number of parties the attorney represents in a case.

Docket Report

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.

Figure 4. Docket Sheet Case Number Selection



The screenshot shows the ECF Docket Sheet interface. At the top, there are navigation tabs for 'Civil', 'Criminal', and 'Query'. Below the tabs, the title 'Docket Sheet' is displayed. A 'Case number' field contains '3:08-cr-71631-2.3' and a 'Hide Case List' button is next to it. Below the case number field, the text 'Select a case:' is followed by a list of cases with checkboxes:

- 3:08-cr-71631-ACA-BGB USA v. da Vinci et al
- 3:08-cr-71631-ACA-BGB-1 Leonardo da Vinci
- 3:08-cr-71631-ACA-JB-2 Galileo Galilei
- 3:08-cr-71631-ACA-JB-3 Rene Descartes
- 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.

New User Interface for Docketing

The user interface for docketing has been modified to include a case participant tree on the left side of the screen, in which all case participants are listed for easy reference.

Pick Attorney

Figure 5. Pick Attorney Screen

1:08-cv-00408-EDE-TCT Newton v. Leibnitz et al

Pick Attorney

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

- [-] **Leonardo Fibonacci** dft
 - [-] **Attorney**
 - John Napier
- [-] **Gottfried W Leibnitz** dft
 - [-] **Attorney**
 - John Napier
- [-] **Isaac Newton** pla
 - [-] **Attorney**
 - Nicolas Mercator

Select the attorney(s)

- John Napier (1692644)
- Nicolas Mercator (321)

Next **Clear**

The right side of the screen displays the existing attorneys. If an attorney's name is not listed, you must call the Clerk's Office to add the new attorney. The newly added attorneys are not associated with any parties and thus are not shown in the participant tree on the left side of the screen.

If the right pane of the screen does not contain the attorney pick list, to bring the attorney pick list back to the right pane, the user should click the **Pick Attorney** button at the top of the screen.

Pick Filer

Pick Filer, when clicked, displays an interface similar to **Pick Attorney**. The right side of the screen displays the existing parties. If a party's name is not listed, you must call the Clerk's Office to add the new party.

If the right pane of the screen does not contain the party pick list, 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.

Pick Defendant in Criminal Cases

Pick Defendant, when clicked, displays an interface similar to **Pick Attorney** and **Pick Filer**. The right side of the screen displays the existing parties.

If the right pane of the screen does not contain the party pick list, to bring the party pick list back to the right pane, the user should click the **Pick Defendant** button at the top of the screen.

IMPORTANT

The new user interface utilizes "panes" on the screen, so the user must never click the browser **Back** button while working on screens that contain the case participant tree. Doing so will cause all progress to be lost.

Redaction Message

The Committee on Court Administration and Case Management (CACM) issued a new requirement to modify the redaction disclaimer text on the login screen and added a checkbox to the login screen for attorneys.

Attorney users MUST check this new checkbox to acknowledge having read the redaction disclaimer.

In addition, the reminder question *Have you redacted?* was added to the final docket text review screen during docketing. All filers will see this message.

Figure 6. Login Screen with Redaction Acknowledgement Checkbox for Attorneys

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 filing:
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 "free 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.psc.uscourts.gov>.

Authentication

Login:
Password:
client code:

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

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.

Notice
An access fee of \$0.08 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) 676-6856.

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