

## APPENDIX: Public Access Changes

### A1 All PACER Users

#### A1.1 Displaying Court Site Information to the Public

Certain court information now is available to public users without first requiring the users to log in to the application. The same information also is available to users who have already logged in.

Available on the CM/ECF welcome screen and the Utilities menu is the new Court Information program. If the user clicks this item, either from the welcome screen or the Utilities menu, the following information is displayed: the name of the court, the version of CM/ECF the court is currently running, the date the court went live on CM/ECF, the file size limitation for documents, descriptions of public flags, the court's address, the court's phone number, the court's e-mail address, the court's hours of operation, the PACER Service Center's address, the PACER Service Center's phone number, and the PACER Service Center's e-mail address. This information is populated from **codes** and **site** table entries. Following is a sample Court Information Report; this is a sample screen.

#### Court Information Report – Sample Output

Court Information	
Court Details	
Court's Name	United States District Court for the Southern District of Alabama
Software Version	CM/ECF-DC V3.0
ECF Go Live Date	5/10/2003
Maximum PDF File Size	10 MB
Court Locations	
Court's Name	<b>United States District Court for the Southern District of Alabama</b>
Court's Address	113 St. Joseph Street, Mobile, AL 36602
Court's Phone Number	(251) 555-1212
Court's Hours	8:00AM to 5:00PM, Monday through Friday
Pacer Details	
Pacer's Address	PACER Service Center, P.O. Box 780549, San Antonio, TX 78278-0549
Pacer's Phone Number	(800)676-6856, or (210)301-6440 if residing in the San Antonio area.
Pacer's Email Address	pacer@psc.uscourts.gov
Flag Definitions	
Code	Translation
APPEAL	Appeal
ARBITRATION	Arbitration
CASREF	Case referred

## A1.2 Searching for Documents within a Case

PACER users now can access PDF documents for a case without first running a Docket Report. The new View a Document item on the Query menu presents the user with a single text entry field. If the user enters a document number in this field and the document is available to PACER users or to the specific CM/ECF user, the Transaction Receipt is displayed. If the user clicks the **View Document** button, the document is displayed. This new query provides a way to access documents without first being charged to access the Docket Report.

### View a Document Query

**View Document**

Case Number  
6:05-cv-70001-RTR-FBF Newton v. Descartes et al

Document

Run Report Clear

## A1.3 Query Changes

- The output of the Associated Cases Query now displays the other court name and case number, not just the case number. The format for the other court information is the same as that used for civil cases: a bold heading followed by a blank line and then a table with the court name in the left column and the case number in the right column.

The display of associations now includes terminated associations and the association end date. The associations are sorted with pending associations listed above terminated associations.

- All pending parties now are included in the Case Summary query. Previously, consolidated plaintiff and consolidated defendant parties did not appear in the output for the Case Summary query.
- A hyperlink to the Docket Report was added to the output screen for the Related Transactions query.
- The Party and Attorney queries now sort by case number first by office number, then all four digits of the year, and then case type.

## A1.4 Calendar Events Report

Users can now select natures of suit from the selection screen of the Calendar Events Report. The report was modified so that if any natures of suit are chosen, only civil cases having the associated natures of suit and meeting other selection criteria will appear on the report; no criminal cases will appear. If the user doesn't select any natures of suit (meaning only the blank line of the field is selected), then the report will return all civil and/or criminal cases meeting the other selection criteria.

The nature of suit is displayed on the output of the Calendar Events Report as follows:

[7:05-cv-07200-EHE-TBT Napier v. Dee et al](#)  
(Nature of Suit 130 - Miller Act)

Short titles for criminal cases are now displayed correctly on the Calendar Events Report. The case title is obtained from the lead case record.

### ***A1.5 Civil Cases Report***

The options **Nature of Suit** and **Cause of Action** were added to the *Sort by* list on the selection criteria screen for the Civil Cases Report.

The following warning message now appears at the top of the selection criteria screen for the Civil Cases Report:

**Warning: This report is not subject to the 30 page billing cap. You will be billed for the total number of pages. If you want to run a report for a single case, you can use the Query menu or the Docket Report.**

The date range fields for the Civil Cases Report are now limited to a 31 day time period. If the user changes the date range to a time period greater than 31 days, the following message will appear, and the user must change the date range: **"Warning: The date range you entered is too large. Please enter a date range no larger than 31 days. Click OK to continue."** The user will not be able to run the report until the date range entered is at most 31 days.

### ***A1.6 Criminal Cases Report***

Judges' names now display properly on the Criminal Cases Report. Previously, a comma was printed between the first name and the last name (e.g., John, Smith).

The Criminal Cases Report now provides subtotals based on the sort criteria selected by the user.

The heading of the Criminal Cases Report now displays only at the beginning of the report. Previously, the heading was displayed in various locations when the report was printed.

### ***A1.7 Docket Activity Report***

Totals are now provided at the end of the report output.

The type (*Category*) and sub-type (*Event*) for each event are now displayed on the report output when the user selects the *Full Docket Text* option on the selection screen.

### ***A1.8 Docket Report***

Previously, the word *ALL* was added to the end of the case number at the top of the docket sheet when the Docket Report was run for all of the defendants in a multi-defendant case. If a court chooses to display the judges' initials at the end of case numbers, and a case did not have a magistrate judge, then the display of *ALL* was confusing because it could have been mistaken for the initials of a magistrate judge (for example, 1:01-cr-02415-MLW-ALL). The report now displays the words *All Defendants* next to the case number if it is run for all defendants.

The appellate court name and case number now appear on the docket sheet if a case is on appeal and the appellate case number was entered either by docketing an event that contained the **AssignAppealNum** DPF or via the Edit Case Associations utility.

### A1.9 PACER Access and Preferences

- The PACER Service Center now allows users to set formatting requirements for the *Client Code* field. Also, PACER users can indicate whether the *Client Code* should be mandatory when logging in to CM/ECF. To implement these new features, PACER users should go to the PACER Service Center website at <http://pacer.psc.uscourts.gov> and click on **Account Information**.
- PACER users now can determine whether they see billing receipts for every billable transaction. To set their billing receipt preference, PACER users should go to the PACER Service Center website at <http://pacer.psc.uscourts.gov> and click on **Account Information**.
- The ECF/PACER login screen was modified to include more detailed instructions to the users, so they will know which login is expected. Following is the new login screen.

#### CM/ECF Filer or PACER Login Screen

**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, and you will be charged \$.08 per page.

**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:

**NOTICE:** An access fee of \$.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.

## A2 Attorney PACER Users

### A2.1 Attorney Lead/Notice Designation

The **Attorney Lead/Notice Designation** screen includes checkboxes that allow the filer to specify attorney/party associations when a previously unassociated attorney is identified during docketing. The checkboxes are as follows (with the second two only available if the first is selected), and are shown in the figure below:

- Attorney represents party
- Attorney is party's lead attorney
- Attorney will receive notices of events associated with party's case

**Answers to Complaints**  
[7:05-cv-07200-EHE-TBT Napier v. Dee et al](#)

The following attorney/party associations do not exist for this case.  
Please check which associations should be created for this case:  
***Be sure to uncheck the box on the left if the attorney is not associated with the named party!***

Pedro Nunes (pty:dft) represented by Thomas Digges (aty)     Lead     Notice  
 John Dee (pty:dft) represented by Susan Variar (aty)     Lead     Notice  
 Christopher Clavius (pty:dft) represented by Susan Variar (aty)     Lead     Notice  
 Gemma Regnier (pty:dft) represented by Thomas Digges (aty)     Lead     Notice  
 Gemma Regnier (pty:dft) represented by Susan Variar (aty)     Lead     Notice  
 Adam Riese (pty:dft) represented by Thomas Digges (aty)     Lead     Notice  
 Adam Riese (pty:dft) represented by Susan Variar (aty)     Lead     Notice

Select all attorneys

Next    Clear

### A2.2 Case Flags on Docketing Screens

Courts can choose to have case flags appear during docketing at the top of each docketing screen, under the case number. If a case has many flags, and the display of the flags is greater than two lines, a small scroll bar appears on the right side of the list of flags so the user can scroll to see the additional flags.

### A2.3 Deadlines

Under Rule 6(e) of the Federal Rules of Civil Procedure, service by electronic means is treated the same as service by mail. Rule 6(e) provides three additional calendar days to a deadline for a party who is served by mail or electronic means. Rule 6(a) provides that if a deadline is greater than 10 days, the period is calculated by using calendar days; if the deadline is less than 11 days, it is calculated by using business days. Now, CM/ECF correctly calculates periods of 10 days or less by using business days and then calculates the additional period using calendar days to arrive at the correct deadline for the prescribed period.

## A2.4 Maintaining E-mail Settings (if Attorney has Permissions to do so)

In [Maintain Your Account](#) → **E-mail Information** or [Maintain E-mail Information](#), after the user enters an e-mail address in the proper format (a@b.c), the main options for that e-mail address appear.

### Main Options for Primary E-Mail Address

Email Information for Rene Descartes					
Primary E-mail Address	Format	Delivery Method	Active	In All My Cases	Additional Options
rene_descartes@planelaw.com	HTML	Individual NEF	Yes	Yes	Click to Show/Hide Options
<input type="button" value="Add Additional E-mail Address"/> <input type="button" value="Return to Person Information Screen"/> <input type="button" value="Clear"/>					

To add additional cases to the list for this e-mail address, the user must select **Additional Cases** from the *Additional Options* dropdown list. Then, the user can select **Add** from the *Additional Cases to Receive NEFs* dropdown list that appears.

### Add Additional Cases to Receive NEFs

Email Information for Rene Descartes					
Primary E-mail Address	Format	Delivery Method	Active	In All My Cases	Additional Options
rene_descartes@planelaw.com	HTML	Individual NEF	Yes	Yes	Additional Cases
<div style="border: 1px solid black; padding: 5px;"> <input type="button" value="Add"/> <b>Additional Cases to Receive NEFs</b> </div>					
Enter case number <input type="text"/> and click <input type="button" value="Add to List"/>					
<input type="button" value="Add Additional E-mail Address"/> <input type="button" value="Return to Person Information Screen"/> <input type="button" value="Clear"/>					

When the user enters a case number, if there is more than one case for the year and number entered, a pop-up window appears. The user is prompted to select the correct case from the list in the pop-up window. If the case number entered in the *Enter case number* field is not a valid case, a pop-up window appears stating such.

### Select Appropriate Case Pop-up Window

*There is more than one case that matches the number entered; select the appropriate case below.*

1:05-cr-70001-ABA-FRF - USA v. Leibnitz

4:05-cv-70001-CBC-FJF - Newton v. Leibnitz

6:05-cv-70001-RTR-FBF - Newton v. Descartes et al

Once the user selects the appropriate case number, the case is added to the *Additional Cases to Receive NEFs* list. The user can add as many cases to the list as desired.

**Additional Cases to Receive NEFs**

Email Information for Rene Descartes						
Primary E-mail Address	Format	Delivery Method	Active	In All My Cases	Additional Options	
rene_descartes@planelaw.com	HTML	Individual NEF	Yes	Yes	Additional Cases	
<div style="border: 1px solid black; padding: 5px;"> <p><b>Add</b> Additional Cases to Receive NEFs</p> <p>4:05-cv-70001-CBC-FJF - Newton v. Leibnitz</p> <p>Enter case number <input type="text"/> and click <input type="button" value="Add to List"/></p> <p><input type="button" value="Add Additional E-mail Address"/> <input type="button" value="Return to Person Information Screen"/> <input type="button" value="Clear"/></p> </div>						

To remove a case from the list, the user must select **Remove** from the *Additional Cases to Receive NEFs* dropdown list and then click on the appropriate case number. A **Remove from List** button appears, allowing the user to remove the case from the list.

There are two delivery methods for receiving NEFs: individual and summary. The delivery method of choice is selected for all the cases in the user’s list. However, if the user wants to receive the opposite method of delivery for one or some cases, the user should select **Delivery Method Exceptions** from the *Additional Options* dropdown list. If the user then selects **Add** from the *Delivery Method Exceptions* dropdown list that appears, the user can select the case(s) to add for the other delivery method.

**Delivery Method Exceptions Options**

Email Information for Rene Descartes						
Primary E-mail Address	Format	Delivery Method	Active	In All My Cases	Additional Options	
rene_descartes@planelaw.com	HTML	Individual NEF	Yes	Yes	Delivery Method Exceptions	
<div style="border: 1px solid black; padding: 5px;"> <p><b>Add</b> Delivery Method Exceptions</p> <p>The following cases will receive Summary NEF e-mails.</p> <p>Select case to add to list here and click <input type="button" value="Add to List"/></p> <p>Ad. <input type="button" value="Return to Person Information Screen"/> <input type="button" value="Clear"/></p> <p>2:05-cv-07200 - Burnell v. Smith</p> <p>4:05-cv-70001-CBC-FJF - Newton v. Leibnitz</p> </div>						

To add and configure additional e-mail addresses, the user should click the **Add Additional E-mail Address** button, which causes the *Secondary E-mail Addresses* field to appear.

**Additional E-Mail Addresses Field**

Email Information for Rene Descartes						
Primary E-mail Address	Format	Delivery Method	Active	In All My Cases	Additional Options	
rene_descartes@planelaw.com	HTML	Individual NEF	Yes	Yes	Additional Cases	
<div style="border: 1px solid black; padding: 5px;"> <p><b>Show</b> Additional Cases to Receive NEFs</p> <p>2:05-cv-07200 - Burnell v. Smith</p> <p>4:05-cv-70001-CBC-FJF - Newton v. Leibnitz</p> <p><b>Secondary E-mail Addresses</b></p> <p><input type="text"/></p> <p><input type="button" value="Add Additional E-mail Address"/> <input type="button" value="Return to Person Information Screen"/> <input type="button" value="Clear"/></p> </div>						

If the user enters a valid e-mail address, the e-mail settings options appear for modification, which works the same as for the primary e-mail address. The user can change the format, delivery method, and active settings; add additional cases, remove cases; and set delivery method exceptions for the secondary e-mail address. For all attorney users, the *Active* checkbox is available only for additional e-mail addresses. For court users, all e-mail addresses can be de-activated.

**Additional E-Mail Address Options**

Email Information for Rene Descartes					
Primary E-mail Address	Format	Delivery Method	Active	In All My Cases	Additional Options
rene_descartes@planelaw.com	HTML	Individual NEF	Yes	Yes	Additional Cases
<div style="border: 1px solid black; padding: 2px;">           Show Additional Cases to Receive NEFs            2:05-cv-07200 - Burnell v. Smith            4:05-cv-70001-CBC-FJF - Newton v. Leibnitz         </div>					
Secondary E-mail Addresses					
rdescartes@planelaw.net	HTML	Individual NEF	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Click to Show/Hide Options
<input type="button" value="Add Additional E-mail Address"/> <input type="button" value="Return to Person Information Screen"/> <input type="button" value="Clear"/>					

Once the e-mail addresses have been added and configured, the user submits the changes by clicking the **Return to Person Information Screen** button.

**A2.5 Changes to the Notice of Electronic Filing (NEF)**

- The wording on the NEF was changed as follows: “Notice will be electronically mailed to:” was changed to **“Notice electronically mailed to”** and “Notice will be delivered by other means to:” was changed to **“Notice delivered by other means to”**.
- The text **“No document attached”** appears on the NEF when no document/document number exists for the docket entry or when no document is attached but a document number exists.
- Information on NEFs is now displayed in the following order:

- Case Title
- Case Number
- Filer
- Document Number
- Docket Text
- Notice electronically mailed to
- Notice delivered by other means to
- Document Description
- Original Filename
- Electronic Document Stamp

**A2.6 Adding an Attachment During Docketing**

When adding an attachment during docketing, the instructions for Step 2 were changed to:

**Before proceeding to step 3, describe the document using the Category list, the Description box, or both.**