

Electronic Case Filing System User's Manual

United States District Court
For the
Southern District of Texas
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Electronic Case Filing System User's Manual

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Introduction

This manual provides instructions on how to use the Electronic Case Filing System (ECF) to file documents with the court, or to view and retrieve docket sheets and documents for all cases assigned to this system. Users should have a working knowledge of Internet Browser software and the conversion of documents to portable document format (PDF). Users should also be familiar with the ECF Administrative Procedures and standing orders for the United States District Court, Southern District of Texas.

Help Desk

Contact the Court's Help Desk between the hours of 8:00 A.M. and 5:00 P.M., Monday through Friday, if you need assistance using ECF.

The Help Desk's Toll Free number is 866-358-6201

ECF System

ECF allows users to electronically file pleadings and documents in civil, and miscellaneous cases.

Hardware and Software Requirements

The following hardware and software are needed to electronically file, view and retrieve case documents:

- ! A personal computer running a standard platform such as Windows NT, Windows 98 or Macintosh
- ! An Internet provider using Point to Point Protocol (PPP)
- ! Netscape Navigator software version 4.7 or greater or Internet Explorer 5.0 or greater
- ! Software such as Adobe Acrobat Writer to convert documents from a word processor format to portable document format (PDF)
- ! A scanner to convert documents that are not in your word processing system
Note: This would only be required for documents that cannot be produced electronically. File size is limited to no more than 3 megabytes or approximately 50 pages of a document converted to PDF through scanning.
- ! Access to electronic mail (e-mail)
- ! PACER Registration:
ECF users must have a PACER account with the Court in order to use the Query and Report features of the ECF system. The United States Congress has given the Judicial Conference of the United States authority to impose user fees for electronic access to case information. All registered agencies or individuals will be assessed the charge of \$.07 per page. Generally, a page is defined as 54 lines of data. Additionally, there is a cap on the \$.07 per page charge for a maximum of \$2.10 (the equivalent of 30 pages) for electronic access to any single document. When charges are accrued, a transaction receipt will appear before the document is viewed. This receipt will indicate the date and time of the transaction, the type or description of the transaction, the number of pages

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billed and the cost for that particular transaction. The user can click the "View document" button to proceed, or use the browser's back button to cancel the request. The PACER Service Center sends quarterly statements to account holders. For any balance that is less than \$10, billing will be deferred until the next quarter.

For more information regarding billing and payment requirements and if you do not have a PACER login, contact the PACER Service Center to establish an account. You may call the PACER Service Center at (800) 676-6856 or (210) 301-6440 for information or to register for an account. Also, you may register for PACER online at <http://pacer.psc.uscourts.gov>. A link to PACER's site is also provided on the Court's web site. There is no fee to obtain the account. It takes approximately one week to receive a login and password from the PACER Service Center.

Registering for Access to ECF

Attorneys admitted to the bar of this court, including attorneys admitted pro hac vice, must register as filing users of the court's ECF system prior to filing any pleadings electronically. Registration can be accomplished by completing an ECF Registration Form online at the Court's web page (<http://www.txs.uscourts.gov>).

A registered user should not allow another person to file a document using the user's log-in and password, except for an authorized agent of the filing user. Use of a user's log-in and password by a staff member shall be deemed to be the act of the registered user.

Registration constitutes consent to service of all documents by electronic means as provided in the ECF Administrative Procedures for the Southern District of Texas and Federal Rule of Civil Procedure (Fed.R.Civ.P) 5(b) and 77(d).

Once an account has been established by the court, your login and password will be sent to you by the Office of the Clerk via e-mail from the CM/ECF Registrar.

More information on training for attorneys and court staff is also available on our web site.

Portable Document Format (PDF)

Users must set up software such as Adobe's Acrobat Reader in order to view documents that have been electronically filed on the system. All pleadings must be filed in PDF format. When installing this product, please review and follow Adobe's directions to utilize Acrobat Reader after installation.

How to View PDF Documents

Users should preview the PDF formatted document to ensure that it appears in its entirety and in the proper format.

1. Start the Adobe Acrobat or Adobe Acrobat Reader program.
2. Go to the File menu and choose Open.
3. Click on the location and file name of the document to be viewed.

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4. If the designated location is correct, and the file is in PDF format, Adobe Acrobat loads the file and displays it on the screen.

If the displayed document is larger than the screen or consists of multiple pages, use the scroll bars to move through the document.

Click on the View menu for other options for viewing the displayed document. Choose the option that is most appropriate for the document.

How to Convert Documents to PDF Format

You must convert all of your documents to PDF format before submitting them to the Court's Electronic Case Filing (ECF) system. The conversion process requires special software such as Adobe Acrobat Writer or FinePrint pdfFactory. WordPerfect versions 9 and 10 have Acrobat Writer built-in and can also be used to convert documents to PDF. However, converting a document to PDF through WordPerfect generally produces a larger file size than through Adobe Acrobat Writer.

Using any word processing program:

1. Install Acrobat Writer or FinePrint pdfFactory on your computer
2. Open the document to be converted
3. Select the [Print] option (generally found in the File menu) and in the dialog box select the option to change the current printer. A drop down menu with a list of printer choices is displayed.
4. Select Adobe PDFWriter or FinePrint pdfFactory
5. "Print" the file. The file should not actually print out; instead the option to save the file as a PDF format file appears.
6. Make a note of the file location so you can find the document later when you are ready to upload it. Change the location if necessary by clicking in the "Save in" area of the window.
7. Name the file, giving it the extension .PDF and click the [Save] button.
8. Depending on the word processing program being used, it may be necessary to find the printer selection option elsewhere. At that point, change the printer to Adobe PDFWriter, and follow the directions above.
9. You must have either Adobe Acrobat Writer or FinePrint pdfFactory installed on your computer to see these choices listed.

Documents Filed In Error

A document incorrectly filed in a case may result from a) posting the wrong PDF file to a docket entry; b) selecting the wrong document description from the menu; or c) entering the wrong case number and not discovering the error before completing the transaction.

To request a correction, telephone the court's toll free Help Desk at 1-866-358-6201.

You will need to provide the case and document numbers for the document requiring correction. If appropriate, the court will make an entry indicating that the document was filed in error. You will be

advised if you need to re-file the document. The ECF system does not permit you to change the misfiled document(s) or incorrect docket entry after the transaction has been accepted.

Case Numbers

A case number is assigned to every case filed in the court. The number is assigned by office code, year filed, docket type and then docket number. For example, 4:04CV4009 is a Houston case filed in 2004 as a civil action assigned number 4009.

Division Number	Division Location
1	Brownsville
2	Corpus Christi
3	Galveston
4	Houston
5	Laredo
6	Victoria
7	McAllen

The User Interface

Stopping a Filing in Progress

The user may always exit a CM/ECF transaction before it is committed by clicking on another menu selection from the top of the frame or logging out of the system.

The "Tab" Key

CM/ECF screens are navigated by using the mouse, however the user may also use the TAB key and space bar to move through the data entry fields in most screens. The user can also use the SHIFT key and the TAB key simultaneously to move back one field at a time.

Menus And Event Selections

Navigating and posting events in CM/ECF is by menu and sub-menu event selections. The menus and events users will see are predicated on their user types (i.e., Court User or Attorney User) and access level to the system.

Selecting Multiple Parties Or Events

Most of CM/ECF's selections appear in alphabetical order in drop down lists. Multiple items may be selected from these lists by holding the CONTROL key and clicking on selections in the same drop down list. To select a range of items, hold the SHIFT key and click on the top and bottom of the selection range.

User Supplied Text

Users may supply additional text or augment the system-supplied text in the blank windows provided. Any text supplied by a non-court user will be displayed on the docket sheet in italic print.

Manipulating the screens

Most screens have the following two buttons:

The clear button resets any changes to information that you have made on the current screen..

The next or submit buttons accept the entry just made and displays the next entry screen, if any.

Correcting a mistake

Use the back button on the browser toolbar to go back and correct an entry made on a previous screen. However, once the document is transmitted to the court, only the court can make changes or corrections.

How to Access the System

Users can get into the system via the Internet by going to www.txs.uscourts.gov and clicking on the CM/ECF hyperlink to open the login screen and login to ECF.

Logging In

The next screen is the login screen.

Enter your ECF Login and Password in the appropriate data entry fields. All ECF login names and passwords are case sensitive.

Note: Use your ECF login and password if you are entering the system to file a pleading or to maintain your account. If you only wish to enter ECF to query the database for case information or to view a document, enter your PACER login and password. You will be charged a fee to view ECF case dockets and documents of \$.07 cents per page up to a maximum of \$2.10 per document.

Verify that you have entered your ECF login and password correctly. If not, click on the [Clear] button to erase the Login and Password entries and re-enter the correct information. After you enter the correct login and password information, click on the [Login] button to transmit your user information to the ECF system.

If the ECF system does not recognize your login and password, it will display an error message on a new screen.

Click on the [Back] button in your browser and re-enter your correct login and password. If your login continues to fail call the Help Desk.

Once the Main Menu appears, choose from a list of hyperlinked options on the top bar.

Note: The date you last logged into the system appears at the bottom left corner of this screen. You should review this information each time you login for security reasons. If you believe your last login date and time are incorrect, or suspect an unauthorized party is using your login and password, please telephone the court's Help Desk as soon as possible.

ECF Login and PACER Screen

If you wish to electronically file a document or need to update your User Account (i.e., update an attorney mailing address or alter e-mail notification information), enter the system using your court-generated CM/ECF login and password. During your session, if you deviate from either electronically filing a document or maintaining your user account by clicking on the query or report menus, the system will prompt for your PACER issued login and password. If you choose "Make this my default PACER login", the system will link your PACER information to your CM/ECF login and password. At that point, you will not be required to enter your PACER information while working in CM/ECF.

If you only wish to generate reports (i.e., view a docket sheet) or query case information, initially enter the system using your PACER issued login and password. If you then need filing functionality or the ability to maintain your user account, select the UTILITIES menu from the main blue menu bar. From that menu, select ECF Login to enter your court issued CM/ECF login and password. An explanation of the login procedures is displayed above the prompt boxes on the login screen.

The client code field is an optional field provided on the login screens for tracking purposes during PACER (report and query) functions. It can contain up to 32 characters. If a client code is entered for a transaction, that client code will be presented on the billing statement generated by the PACER Service Center. A client code will not appear on the bill unless it is entered at the time of transaction. Because this code feature is optional, it must be enforced within a user's office.

Selecting ECF Features

ECF provides the following features that are accessible from the Blue menu bar at the top of the opening screen.

- Civil- Select Civil to electronically file all civil case pleadings, motions, and other court documents.
- Criminal- DO NOT FILE DOCUMENTS ELECTRONICALLY IN CRIMINAL CASES
- Query- Query ECF by specific case number, party name, or nature of suit to retrieve documents that are relevant to the case. You must login to PACER before you can query ECF.
- Reports- Choose Reports to retrieve docket sheets and cases-filed reports. You must login to PACER before you can view an ECF report.
- Utilities- View your personal ECF transaction log and maintain personal ECF account information in the Utilities area of ECF.

Logout- Allows you to exit from ECF and prevents further filing with your password until the next time you log in.

Signatures - Affidavits of Service

Documents that must contain original signatures or which require either verification or an unsworn declaration under any rule or statute, shall be filed electronically with originally executed copies maintained by the filer. The pleadings or other documents electronically filed shall indicate a signature, e.g., "s/Jane Doe."

In the case of a stipulation or other document to be signed by two or more persons, the following Administrative Procedure should be followed:

A Filing User who electronically files any document requiring the signature of other individuals must either (1) submit a scanned document containing the necessary signatures; or (2) indicate on the filed document by the designation "s/" that the original document has been signed. The original document containing the original signatures of persons other than the Filing User must be retained until three years after the time for all appeals in the case has expired. A designation on a document that one person has affixed another person's signature "by permission" may be used under circumstances when signing by permission would be acceptable on a conventionally filed document.

Filing a Civil Initiating Document

The Court will continue to accept civil complaints in the traditional manner, that is a hard copy, mailed or delivered in person to the Clerk's Office. However, you may also open a new civil case electronically following the procedures in the Appendix of this document.

Electronically Filing Documents

After successfully logging into ECF, follow these steps to file a pleading. This section of the User's Manual describes the process for filing a Motion in ECF. The process is similar for filing other pleadings in ECF.

Select Civil or from the blue menu bar at the top of the ECF screen. The Event window opens displaying all of the events from which you may choose for your filing.

Click on Motions, under Motions and Related Filings.

Enter the case number in which the document is to be filed and click [Next].

Next, highlight the name of the party or parties for whom you are filing the motion. If you represent all defendants or all plaintiffs you may select the entire group by holding down the control key while pointing and clicking on each party of the group.

After highlighting the parties to the motion, click on the [Next] button.

Note: If your party does not appear, see the section of this manual titled *Add/Create New Party*.

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The Motions screen appears and displays a motion selection field with a scroll bar next to it. Scroll through the menu until you find the type of motion or application you wish to file.

Note: To select more than one motion, press and hold down the Ctrl key, and click on each of the desired multiple forms of relief.

ECF accepts the party or parties you selected and refreshes the screen to display a new Motions screen. ECF displays a field for locating and entering the PDF file of the document (pleading) you are filing in ECF.

Note: You must attach an electronic copy of the actual pleading when prompted by the system. All documents that you intend to file in ECF MUST be in PDF format. Otherwise, ECF will not accept the document and you will not be able to complete the transaction.

Click on the [Browse] button. ECF opens the file upload screen.

Navigate to the appropriate directory and file name to select the PDF document you wish to file.

Highlight the file to upload to ECF.

Note: In order to verify that you have selected the correct document, right mouse click on the highlighted file name to open a quick menu and left mouse click on [Open]. Adobe Acrobat or Acrobat Reader will launch and open the PDF document that you selected. You should view it to verify that it is the correct document.

Once you have verified the document is correct, close Adobe Acrobat and click on the [Open] button. ECF closes the File Upload screen and inserts the PDF file name and location in the Motions screen.

Note: In the event you selected and highlighted a file that is not in PDF format, ECF will display an error message after you click on the [Next] button.

! ECF will not permit you to select a file for your pleading that is not in PDF format.

! If you fail to select a document to file with your pleading, ECF will display an error message. Click on the [Back] button and ECF will return to the Motions screen. Select and highlight the PDF file of your pleading and proceed as before.

! You cannot proceed without attaching a PDF document.

If there are no attachments to the motion, click on [Next]. Note that any Proposed Order included with your filing should be saved as a separate PDF document and attached using the following steps.

Attachments

If you have Attachments to your motion, you will select [Yes] and then click [Next].

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If you acknowledged the need to attach documents to your motion during the previous step, a new Motions screen appears.

Click on [Browse] to search for the document file name of the attachment.

Next to the field for attachment Type, click on the arrow and ECF opens a pull-down screen. Highlight the type of attachment from the displayed selection.

To describe the attachment more fully, click in the Description box and type a clear and concise description of the attachment.

Click on [Add to List].

ECF adds the selected document as an attachment to the pleading. A new Motions screen opens to display the file name of the newly attached document.

Repeat the sequence for each additional attachment.

If the document you wish to file requires leave of court, such as an amended complaint or a document to be filed out of time, the proposed document shall be attached as an exhibit to the motion.

After adding all of the desired PDF documents as attachments, click on [Next].

Note - Attachments should be excerpts of the referenced documents and must be broken into files smaller than 3 megabytes in size (approximately 50 pages).

Modify docket text

Most events include a modifier drop-down list. Select a modifier (e.g., amended, final, agreed, etc...) when appropriate.

Users may supply additional text or augment the system-supplied text in the blank windows provided. Any text supplied by a non-court user will be displayed on the docket sheet in italic print.

Submit the pleading

Click on the [Next] button. A new Motions window appears with the complete text for the docket report.

Review the docket text and correct any errors. If you need to modify data on a previous screen, click the back button on the browser toolbar to find the screen you wish to alter.

Click on the [Next] button.

The following warning will appear:

Attention: Pressing the NEXT button on this screen commits this transaction. You will have no further opportunity to modify this transaction if you continue.

At any time prior to this step, you can abort the ECF filing by clicking on any hyperlink on the Blue ECF menu bar. If you are ready to file the document, click on the [Next] button to finish the filing process.

Notice of Electronic Filing

On clicking the NEXT button from the final filing screen, you will receive a Notice of Electronic Filing confirmation page. This screen provides confirmation that ECF has registered your transaction and the pleading is now an official court document. It also displays the date and time of your transaction and the number that was assigned to your document.

Finally, it will list attorneys who have receive notice of the filing of your document electronically. You are not required to serve copies of your document on attorneys who receive electronic notice in this fashion.

Select [Print] on the browser toolbar to print the document receipt for your records.

E-Mail Notification of Documents That Were Filed

After a pleading is electronically filed, the ECF System sends a Notice of Electronic Filing to the designated attorneys and parties who have registered for ECF and supplied their E-mail addresses to the Court. Individuals who receive electronic notification of the filing are permitted one "free look" at the document by clicking on the associated hyperlinked document number embedded in the Notice of Electronic Filing. The filer is permitted one free look at the document to verify that the pleading was properly docketed. The system virtually marks or records the viewing of the document when the user clicks on the hyperlink. The Court strongly urges you to print or save the Notice of Electronic Filing and pleading documents for future use. Subsequent retrieval of the case docket sheet and pleading from CM/ECF must be made through your PACER account and is subject to regular PACER fees.

Note: It is the responsibility of filers to send hard copies of the pleading and Notice of Electronic Filing to attorneys and pro se parties who do not receive electronic mail service from the Court.

Notification Of Entry of Orders, Minutes and Court Notices

Registered users of ECF will receive electronic notification of the entry of orders, minutes or notices from the Court in the manner described above for other filed documents. In addition, the noticing system will send copies of such Court documents to all parties in interest by mail or fax.

Add/Create a New Party

In some instances you may need to add a party to the ECF system. This may generally occur when filing amended complaints, third party complaints, etc. If the party you are adding is not listed in the "Select a Party" screen, click on Add/Create New Party.

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You must first perform a search to see if your party is already entered on the ECF system. Type the first few letters of the party's last name for an individual, or the first few letters of the company name. Click [Search].

If a match is found, ECF will display a list of party names. If the name of the party you are adding appears in the list, click on it and then click [Select name from list]. Review the party information and select the party's role in this filing. Click [Submit].

If a match is not found, or the party does not appear in the list, click [Create new party].

For a company, enter the entire company name in the Last Name field. Any elaboration on the role or title of the party (such as "as next friend of John Doe," or "as successor in interest to Other Corporation") should be typed in the Party Text field.

Choose the appropriate Role from the drop down list. Click [Submit].

For an individual, fill out the Last Name, First Name, Middle Name, Generation and Title fields as appropriate. Again, any elaboration on the role or title of the party (such as "as next friend of John Doe," or "as successor in interest to Other Corporation") should be typed in the Party Text field. Choose the appropriate Role from the drop down list. Leave all other fields blank. Click [Submit].

Linking Documents (Refer to previously filed documents)

Some pleadings such as Responses, Briefs and Indexes should be "linked" to their related documents in the case. To link the document you are currently filing to a previously filed document, check the box in front of "Refer to existing event(s)?" and click [Next].

Once you click [Next] you are presented with a list of documents that match your search criteria.

Click the checkbox for the document you wish to link to and click [Next]. When filing responses to motions, make sure the response is linked to the proper motion or motions.

Note - If you do NOT link your document to the previously filed document to which it is relevant, case management reports may not show your document when the previously filed document is considered by the judge. In particular, any document related to a previously filed motion or application should ALWAYS be linked to that motion or application.

Query Feature

To enter the Query mode, click on Query from the Blue menu bar of ECF. ECF opens the PACER Login screen. You must enter your PACER login and password before being permitted to query the database.

Note: Your PACER login and password are different from your ECF login and password. You must have a PACER account in order to retrieve, view, and print certain documents. You will be charged a fee of \$.07 cents per page to access documents, docket sheets, etc. from ECF.

Instructions for using features of the PACER system are available at the PACER Service Center web site at pacer.psc.uscourts.gov

Reports Feature

The reports available in this system require a PACER login for access, just as the Query Feature (q.v.) does. PACER will allow you to generate reports of dockets and filed cases. Your ECF login does not provide access to those features.

Utilities Feature

The Utilities feature provides several options, such as:

Maintain Your ECF Account

Click on the Maintain Your ECF Account hyperlink to open the Maintain User Account information screen.

This screen displays all of the registration information that is contained within the ECF database for your account with the Court. This includes Bar Identification and Bar status. **YOU WILL BE REQUIRED TO UPDATE USER INFORMATION, INCLUDING MAILING ADDRESS, PHONE NUMBER AND E-MAIL ADDRESS WHENEVER THERE IS A CHANGE.**

ECF will E-mail to parties their Notices of Electronic Filing based upon the information entered on the screen that opens when you click the [E-mail information] button. Perform the following steps to enter additional e-mail addresses for individuals that you wish ECF to notify regarding new case pleadings and documents.

1. Place a check mark by clicking on the box to the left of the line that reads "to these additional addresses".
2. Enter the e-mail addresses of those individuals you wish to notify concerning ECF activity. This data entry field has a capacity of 250 characters for approximately ten E-mail addresses.
3. Stipulate the format of the ECF notices by selecting your choice from the bottom of the screen.
4. If you wish to enter completely new information about your account, use the [Clear] button to clear the fields on this screen.
5. After updating your account information, click on the [Return to Account screen] button to return to your Maintain User Account screen.

Use the [More User Information] button to access your login and password information. Your login can be anything that you can readily remember, and can be the same for ECF and PACER. Your password cannot be more than 8 characters, and must be different for each ECF and PACER. You will click on the [Return to Account Screen] button to return to your Maintain User Account screen.

After making any changes to your account, you must click on the Submit button from the Maintain User Account screen. A second screen will appear, possibly listing all cases with

which your account is associated. You must click Submit on this screen in order to produce a confirmation that your changes have been recorded.

View Your Transaction Log

From the Utilities screen, click on the [View your Transaction Log] button. ECF opens a screen with two fields for entering the Date Selection Criteria for a Transaction Log Report. Enter the date range for your report and click on the [Submit] button. ECF displays a report of all your transactions in ECF within the date range you specified for Date Selection Criteria.

Use this feature of ECF to review your transactions and to verify that all of the transactions you entered are reflected in the Transaction Log and no unauthorized individuals have entered transactions into ECF using your login name and password.

Miscellaneous

ECF provides three Miscellaneous functions within the Utilities feature of the system: Legal Research, Mailings, and Verify a Document.

When you click on the Legal Research hyperlink from the Miscellaneous screen, ECF opens a new screen that contains hyperlinks to a Law Dictionary, a Medical Dictionary, and Westlaw via the Internet. Select the Verify a Document hyperlink to open a query screen and enter data in the screen fields to locate a particular document attached to a specific case number. There is also a Mailings hyperlink that opens a new screen for requesting mailing information from ECF. Use the Mailings feature to find out which attorneys on a case will receive electronic notification when you file documents electronically.

Logout

After you have completed all of your transactions for a particular session in ECF, you should exit from the system.

Click on the Logout hyperlink from the ECF Blue menu bar. ECF will log you out of the system and return you to the ECF login screen.

Sealed Documents

Continue to file sealed documents at the District Court Clerk's office in accordance with the existing practices and procedures for conventional filing.

Ex parte motions

Ex parte motions should be filed in the Clerk's Office in the conventional manner. Please be sure the motion is clearly labeled as 'ex parte'.

APPENDIX: OPENING CIVIL CASES in CM/ECF

The following step-by-step instructions may be followed to open a case electronically:

ACCESSING DISTRICT CM-ECF

1. Click on Live CM/ECF District.
2. Click on Southern District of Texas - Document Filing System.
3. Enter Login and Password

OPENING A CIVIL CASE

4. Click on Civil.
5. Under the Open a Case section, click on Civil Case - Unassigned.
6. Enter the Office (division) and Case Type (cv or mc). The "bi" and "md" options are for internal use only. Do not select them.

NOTE: The system defaults to "consolidated" for Association type. Do not change the Association type, or enter a Lead Case number.

7. If the case is a notice of removal or a case related to a pending case, proceed to step 8. If not, proceed to step 10.
8. ENTER Other court name and Other court number. Other courts should be the court from which the case is being removed or appealed.
9. Check the box for Related cases.
10. Click Next.
11. Enter **Jurisdiction, Nature of suit, Cause of action, Origin, Jury demand, Class action, Dollar Demand** in thousands of US dollars, and **County** of the filing party as you would on the Civil Cover Sheet. **Citizenship plaintiff** and **Citizenship defendant** are only necessary for cases with jurisdiction based on diversity of citizenship. **Fee status** and **Fee date** should be left unchanged. Filing fees must be paid within three business days of the electronic opening of the case or an order dismissing the case will be prepared for the judge's signature. **Date transfer** should always be left blank, as should **Arbitration Code**.
12. Click Next.
13. Enter name Last name or business name of plaintiff.
14. Click Search.

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15. Click on Create new party if the party is not in the data base; Select name from list if there is a name match which you should verify on the screen that will be displayed.
16. COMPLETE Party Information for Plaintiff -
Change **Role** to Plaintiff - Only enter the plaintiff's name if he is represented by counsel.
Leave all address information blank for represented parties. Complete address information for *pro se* parties.
Enter **Party text** as stated on the complaint (Example: Individually, Successor to)
17. Click on **Alias** if one is provided; otherwise, proceed to step 35.
18. Enter Last/Business name of alias to search for a match.
19. Click Search.
20. If a matching name appears, click on the name to review information for an identical match.
21. If there is a match click on Select name from list.
22. If there is not a match, click on Create new alias.
23. For individuals, enter the complete name; for businesses, enter the entire business name in the Last name field.
24. Select **Role** (aka, dba) from the drop down box.
25. Click on Add alias.
26. Click Review to review the aliases added or click Submit.
27. COMPLETE Party Information for additional Plaintiffs or for the Defendant.
28. Enter name Last name or business name of Defendant.
29. Click Search.
30. Click on Create new party if the party is not in the data base; Select name from list if there is a name match which you should verify on the screen that will be displayed.
31. COMPLETE Party Information for Defendant -
Change **Role** to Defendant
Leave all address information blank for a defendant that has not already appeared *pro se* through a pleading in the case.
Enter **Party text** as stated on the complaint (Example: Individually, Successor to...)
32. Click on **Alias** if one is provided; otherwise, proceed to step 51.

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33. Enter Last/Business name of alias to search for a match.
34. Click **Search**.
35. If a matching name appears, click on the name to review information for an identical match.
36. If there is a match click on Select name from list.
37. If there is not a match, click on Create new alias.
38. For individuals, enter the complete name; for businesses, enter the entire business name in the Last name field.
39. Select **Role** (aka, dba) from the drop down box.
40. Start date is the date the case is filed.
41. Click on **Add alias**.
42. Click **Review** to verify that all party and attorney information have been properly added. Make any necessary corrections.
43. Click **Submit**.
44. When all parties have been added, click **End party selection**.
45. Click **Next**.
46. Click **Next**.
47. The Case Number appears. Click on Docket lead event?
48. Select Complaint (or document) from the drop down box.
49. Click **Next**.
50. Verify case number and click **Next**.
51. Click on the party filer (plaintiff) and then click **Next**.
52. Click on name of the party filed against and then click **Next**.
53. Attach PDF and any attachments by using your BROWSE button, then click **Next**.
54. FEE amount appears, click **Next**.
55. Click **Next**.

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56. REVIEW final text for accuracy. If accurate, click **Next**. Otherwise, start over.
57. Notice of Electronic Filing appears which confirms case has been opened and parties notified.
58. The system does not assign a Judge at this time. A judge will be assigned later via the Clerk's Office.
59. Docket any other documents at this time by clicking on CIVIL on the blue menu bar, then choosing the appropriate category of document.