

**United States District Court
Northern District of Ohio**

CM/ECF Tips:

Obtaining Written Opinions for Free

Obtaining a List of Cases by Category

Obtaining a List of Documents Filed by Date Range and/or Case Category

Turning CM/ECF Document Headers Off/On

Setting up E-Mail Notification

Adding Attachments with Full Descriptions

**United States District Court
Northern District of Ohio
Obtaining Written Opinions**

You can easily obtain a listing of written opinions issued by the Court after April 16, 2005, as well as copies of the documents themselves, for free. Here's how.

1. Log into the Court's CM/ECF system using either your CM/ECF or PACER account.
2. Click on **Reports**
3. If you have logged in using your CM/ECF account, you may be asked for your PACER information here. Enter it.
4. Click on **Written Opinions** under Civil and Criminal Reports
5. The Written Opinions Report screen will provide you with a variety of selection criteria to help you fine tune your search including: Case Number, Name, Office, Nature of Suit, Case Type, Cause, Case Flags, etc.). A screen shot is on the next page. Keep the default values for most of the items as they are. Change only those values that will help you meet your needs.

In the following example, we will search for all Written Opinions entered from 5/13/2005 to 5/19/2005

- a. Select an appropriate filing data range. Enter a **Filed** date of "5/9/2000" and a **to** date of "5/13/05".
 - c. Click **Run Report**.
6. The system will provide you with a list Written Opinions that meet the selection criteria.

Notes:

Written Opinions are defined by the Judicial Conference as as "any document issued by a judge of the court sitting in that capacity that sets forth a reasoned explanation for a court's decision." The responsibility for determining which documents meet this definition rests with the authoring judge

The Nature of Suit codes are taken from the Civil Cover Sheet. You can select more than one Nature of Suit by holding down the control (ctrl) key when you click on your selections.

The **Filed** / **to** dates can be set for any range, but the system only identifies Written Opinions issued April 16, 2005 and later.

While access to Written Opinions is now free, PACER fees still apply for other documents.



Query

Reports

Utilities

Logout



Written Opinions Report

Case Number

Last Name

First Name

Middle Name

Office

Cleveland
Toledo

Nature of Suit

0 (zero)
110 (Insurance)

Case Type

Civil
Criminal

Cause

0 (No cause code entered)
00:0000 (00:0000 Cause Code U...)

Case Flags

2241
2254

Filed between 5/9/2005 and 5/13/2005

Summary text

Full docket text

Sort by Case Number

Run Report

Clear

**United States District Court
Northern District of Ohio**

Cases by Case Category

Did you know that you can obtain a list of civil cases filed in this Court by case category? It's easy. Here's how you do it.

Suppose you wanted to obtain a list of all pending **Insurance** cases.

1. Log into the Court's CM/ECF system using either your CM/ECF or PACER account.
2. Click on **Reports**
3. If you have logged in using your CM/ECF account, you may be asked for your PACER information here. Enter it.
4. Click on **Civil Cases** under Civil Reports
5. The Civil Cases Report screen will provide you with a variety of selection criteria (Office, Case Type, Nature of Suit, Case Flags, Cause, etc.). A screen shot is on the next page. Keep the default values for most of the items as they are. Change the following to meet your needs:
 - a. Select the desired **Nature of Suit**. In this example, scroll down the Nature of Suit list and highlight **110 (Insurance)**.
 - b. Make sure the **Open Cases** check box is checked.
 - c. Select an appropriate filing data range. For this example I will enter a **Filed** date of "1/1/2000" and a **to** date of "5/19/05".
 - d. Click **Run Report**.
6. The system will provide you with a list of the pending Insurance cases.

Notes:

The Nature of Suit codes are taken from the Civil Cover Sheet. You can select more than one Nature of Suit by holding down the control (ctrl) key when you click on your selections.

The **Filed / to** dates can be set for any range. The system has most cases going back to the early 1990s.

The system permits you to select **Open Cases** and/or **Closed Cases** by checking the appropriate check box.

The amount of time it takes to run the report is dependent upon a number of factors including your selection criteria and the number of users using the system.

Give it a try.



Query

Reports

Utilities

Logout



Civil Cases Report

Office	Case type	Nature of suit	Case flags	Cause
Cleveland Toledo	Civil Master Docket	0 (zero) 110 (Insurance) 120 (Contract Marine)	2241 2254	0 (No cause code entered) 00:0000 (00:0000 Cause Code U...)

Filed 1/1/2000 to 5/19/2005

Terminal digit(s) 2, 4-7 Open cases Closed cases

Sort by Case Number

Output Format Formatted Display Data Only

Run Report Clear

**United States District Court
Northern District of Ohio**

**Obtaining a List of Documents Filed by Date Range and/or Case Category
using the
Docket Activity Report**

The Docket Activity Report can help you obtain a list of documents filed with the Court for any day, or during any date range, with convenient links to the documents themselves. You can even narrow your search to documents filed in a specific case or category of cases, such as Patent cases. Here's how to do it. (**Note that applicable PACER charges apply.**)

Suppose you want to obtain a list of the documents filed from May 23rd to May 24th of 2005:

1. Log into the Court's CM/ECF system using either your CM/ECF or PACER account.
2. Click on **Reports**
3. If you have logged in using your CM/ECF account, you may be asked for your PACER information here. Enter it.
4. Click on **Docket Activity**
5. The Docket Activity Report screen will provide you with a variety of selection criteria (Case number, Office, Case Type, Event Category, Case Flags, etc.). A screen shot attached. Keep the default values for most of the items as they are. Change only the items necessary to narrow the focus to the cases you want. In this example, only the date range needs to be altered.
 - a. To obtain the cases filed on May 23-24, 2005 change the dates to read:
"Entered between 5/23/2005 and 5/24/2005"
 - b. Click **Run Report**.
6. The system will provide you with a list of the documents entered into the system on those dates.

Notes: You can focus your search on a single case (just enter the case number) or a particular case category (select the appropriate Case Category flag). You can select more than one Case Category by holding down the control (ctrl) key when you click on your selections. The Case Category flag codes are:

CAT01	Admiralty	CAT08	Personal Injury
CAT02	Antitrust	CAT09	Administrative (Social Security)
CAT03	Civil Rights	CAT10	Tax
CAT04	Contract	CAT11	Copyright / Trademark
CAT05	Habeas Corpus	CAT12	General Civil
CAT06	Labor Relations	CAT13	Death Penalty
CAT07	Patent		

The time it takes to run the report is dependent upon your selection criteria and the number of users on the system. Experiment with whichever search criteria meet your needs.



Docket Activity Report PUBLIC ACCESS

Case number Only cases to which I am linked

Office Case type
Akron Civil
Cleveland Criminal

Event category Case flags
adr_not 2241
answer 2254
app_ord

Entered between 5/24/2005 and 5/25/2005 Summary text
 Full docket text

Sort by Case number

**United States District Court
Northern District of Ohio
Turning the CM/ECF Document Headers Off/On**

The CM/ECF software allows case number, document number, date filed and page number to be displayed in a header on PDF document pages. The original PDF documents filed with the Court will not be altered in any way; instead, the case information will be generated at the time the document is accessed for viewing and/or printing, and affixed to the top of the document pages.

You can easily turn the PDF Document header feature off if you do not want headers to be displayed on documents you view or print. Here is how.

1. Log into the Court's CM/ECF system using your CM/ECF account.
2. Click on Utilities
3. Click on Maintain Your Account
4. Deselect the *Add Headers to PDF Documents* check box.
5. Click Submit button.
6. Click Submit button.

If you wish to turn the PDF document header feature back on, simply follow steps one through three above, reselect the *Add Headers to PDF Documents* check box and follow steps five and six.

United States District Court Northern District of Ohio

Maintain Your Account

(Set up E-Mail Notifications, add additional E-Mail Addresses)

Log into CM/ECF

Authentication

Login:

Password:

client code:

Click on Utilities



Click on Maintain Your Account

Utilities

Your Account [Maintain Your Account](#) [View Your Transaction Log](#) [Change Client Code](#) [Change Your PACER Login](#) [Review Billing History](#) [Show PACER Account](#) [Remove Default PACER Account](#)

Miscellaneous (cont.) [Internet Payments Made](#) [Open a Civil Case](#)

Administration

Edit Data

Miscellaneous [Legal Research...](#) [Mailings...](#) [Verify a Document](#)

[Internet Payment History](#)

Click on the **Email information . . .** button

Maintain User Account

Last name: First name:

Middle name: Generation:

Gender: ATY Type:

Title:

Bar number: Prisoner ID: Add Headers to PDF Documents

Office: Unit:

Address 1: Address 2: Address 3:

City: State: Zip:

Country: County:

Phone: Fax:

Initials: TA: DOB: AO code: End date:

Civil ref style: Criminal ref style:

Date sworn: Status:

To add additional cases to the list for your email address, you must select **Additional Cases** from the *Additional Options* dropdown list.

The screenshot shows the 'Email Information for Attorney Test' form. The 'Primary E-mail Address' field contains 'Traci_A_Lancy@ohnd.uscourts.gov'. The 'Format' dropdown is set to 'HTML', and the 'Delivery Method' dropdown is set to 'Individual NEF'. The 'Active My Cases' field has 'Yes' selected. The 'Additional Options' dropdown is currently set to 'Hide Options'. Below the form are three buttons: 'Add Additional E-mail Address', 'Return to Person Information Screen', and 'Clear'.

You must select **Add** from the *Additional Cases to Receive NEFs* dropdown list that appears. Enter the case number(s). You can add as many cases to the list as desired.

This screenshot shows the same form as above, but the 'Additional Options' dropdown is now set to 'Additional Cases'. A new dropdown menu, 'Additional Cases to Receive NEFs', is open with 'Add' selected. Below this dropdown is a text input field for 'Enter case number(s) and click' and an 'Add to List' button. The 'Add Additional E-mail Address', 'Return to Person Information Screen', and 'Clear' buttons are still visible at the bottom.

To remove a case from the list, you 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 you to remove the case from the list.

This screenshot shows the form with the 'Additional Cases to Receive NEFs' dropdown set to 'Remove'. A list of cases is displayed: '4:06-cv-00001 - Mouse v. Smith' and '4:06-cv-00023-JRA - Lewis v. General Motors Corporation et al'. A 'Remove from List' button is positioned below the list. The 'Add Additional E-mail Address', 'Return to Person Information Screen', and 'Clear' buttons are at the bottom.

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

Email Information for Attorney Test

Test Database Test Database Test Database Tes

Test Database Test Database Test Database Test Database Test Database

Primary E-mail Address Format Delivery Method Active My Cases In All Additional Options

Add Delivery Method Exceptions

The following cases will receive Summary NEF e-mails.

Select case to add to list here and click

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

If you enter a valid e-mail address, the e-mail settings options appear for modification, which works the same as for your primary e-mail address. You can change the format, delivery method, and active settings; add additional cases, removes cases; and set delivery method exceptions for the secondary e-mail address.

Email Information for Attorney Test

Test Database Test Database Test Database Tes

Test Database Test Database Test Database Test Database Test Database

Primary E-mail Address Format Delivery Method Active My Cases In All Additional Options

Add Delivery Method Exceptions

The following cases will receive Summary NEF e-mails.

Select case to add to list here and click

Secondary E-mail Addresses

All changes are submitted by clicking on the **Return to Person Information Screen** button.

Click on the **Submit** button.

United States District Court
Northern District of Ohio

**Adding Attachments to Documents
with Thorough Description**

After browsing and uploading your main document click **Yes** for “Attachments to Document:”

Date document filed (mandatory)
1/26/2007 Calendar

Select the pdf document (for example: C:\199cv501-21.pdf)
Filename
O:\ecftal\Demo\motion.pdf Browse...

Attachments to Document: No Yes

Next Clear

The next screen allows the filer to add attachments to the main document.

Select one or more attachments.
1) Enter the pdf document that contains attachment (for example: C:\appendix.pdf)
Filename
Browse

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

3) Add the filename to the list box below. If you have more attachments, go back to Step 1. When the list of filenames is complete, click on the Next button.

Add to List
Remove from List
Next

- Browse and upload your attachment
- Click on the Category box and select a word that is applicable to your attachment. If none apply, do not select a word.
- Add descriptive text in the Description box. The box is free text.

It is **not** necessary to repeat the word you selected in the Category pick list again in the Description box.

Incorrect:

Category **Description**

Exhibit Exhibit A; Letter to plaintiff from Attorney Jo

Correct:

Category **Description**

Exhibit A; Letter to plaintiff from Attorney Jo



- Click the Add to List button
- The filer can then browse for another attachment or Click on the Next button.

Sample docket text

Motion to Expand the Record filed by Test Defendant. Related document(s) **157**, **156**. (Attachments: # **1** Exhibit 3 - Deposition of Sgt. John Doe; # **2** Exhibit 8 - Declaration of trial counsel Jane Doe; # **3** Exhibit 9 - Declaration of trial counsel Mary Smith; # **4** Exhibit 10 - Declaration of Test Plaintiff; # **5** Exhibit 11 - Declaration of John Smith; # **6** Exhibit 12 - Declaration of Mayor City; # **7** Exhibit 13 - Declaration of Peter Smith; # **8** Exhibit 14 - Declaration of Joe Williams; # **9** Exhibit 15 - State v. Smith trial testimony of John Doe; # **10** Exhibit 17 - State v. Smith trial testimony of John Smith. (Test, Atty)

United States District Court
Northern District of Ohio

Joint Filings

Documents filed on behalf of multiple parties are called joint filings. Examples include stipulations, joint motions, and the report of parties planning meeting.

To submit a joint filing select your event (notice, motion, etc.) as usual. Then enter the case number and place a \sqrt in the “Joint filing with other attorney(s)” box and click “Next”.

The screenshot shows a web form titled "Notices". At the top, there are three tabs labeled "Training Database". Below the tabs is a "Case Number" field containing the text "99-12345, 1:99-cv-12345, 1-99-cv-12345, 99cv12345, or 1:99cv12345". Below the case number field is a checkbox labeled "Joint filing with other attorney(s)". At the bottom of the form are two buttons: "Next" and "Clear".

Select each party for whom you are filing by highlighting (ctrl-clicking) the names in the pick list or by selecting “all defendants”, “all plaintiffs” or “all parties”.

The screenshot shows a web form titled "Select the filer." It has two sections: "Select the Party:" and "OR Select a Group:". Under "Select the Party:" is a pick list containing "Fifth Third Bancorp Ohio [Plaintiff]" and "First Merit Bank [Defendant]". Under "Select a Group:" are four radio buttons: "No Group", "All Defendants", "All Plaintiffs", and "All Parties". At the bottom of the form are two buttons: "Next" and "Clear".

IMPORTANT: You must remove the \sqrt from the screen below if you do not represent the joint filing party. Otherwise, you will create an incorrect attorney/party association.

The screenshot shows a web form titled "Notices". At the top, there are three tabs labeled "Training Database". Below the tabs is the case title "1:07-cv-00002 Fifth Third Bancorp Ohio v. First Merit Bank". Below the case title is a bolded instruction: "The following attorney/party associations do not exist for the above case(s). Please check the box on the left of the screen for associations which should be created. If the association should not be created, be sure the box is unchecked". Below this instruction is a list of associations with checkboxes. The first association is "First Merit Bank (pty:dft) represented by Attorney Test (aty)" with a checked checkbox. At the bottom of the form are two buttons: "Next" and "Clear".