

APPENDIX: PUBLIC ACCESS CHANGES

A1 All PACER Users

A1.1 RSS (Really Simple Syndication) Feed for Public Users

Really Simple Syndication (RSS) is a type of XML that allows Internet browsers and other feed readers to display information from a website. Users can subscribe to RSS feeds so they will be notified every time content is updated on a particular site.

To allow for easier public access to specific data, CM/ECF, at the option of the court, 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.

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, if allowed by the court.

Public users get an “all or nothing” RSS feed based on the events the court allows to be included in the feed. The feed includes the last 100 entries of the court-defined 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.

Figure A1.1.A. Court Information Report Sample Screen with RSS Feed Available

Court Information	
	Court Details
Court's Name	Administrative Office of the US Courts (td4d)
Software Version	CM/ECF-DC V4.0
ECF Go Live Date	01/01/2002
Maximum PDF File Size	15 MB
Maximum Merge Document Size	20 MB
RSS Feed	 Last 100 entries - Internet
Docket entries of type: motion	

A1.1.1 Avoiding Login Prompts When Clicking on Links within the RSS Reader

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.

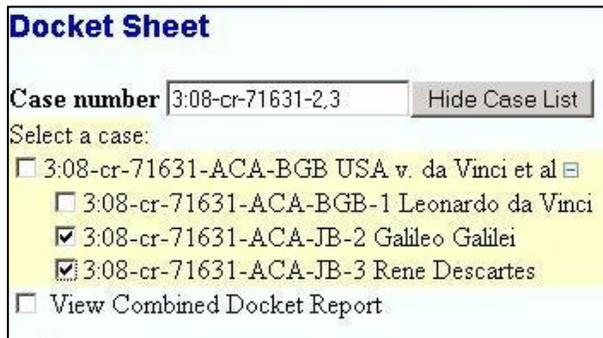
NOTE

The first time the user accesses a feed using an RSS reader (for example, FeedDemon), the user should configure the reader as follows: select the Tools menu, then Options, then Browsing. Check the box for *Open external links in default browser instead of inside FeedDemon*. Apply the changes. Doing this will ensure that the user does not have to log in to CM/ECF after clicking on a case number or a document number hyperlink from the feed.

A1.2 Docket Report

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.

Figure A1.2.A. Docket Sheet Case Number Selection



The screenshot shows a web interface titled "Docket Sheet". At the top, there is a text input field containing "3:08-cr-71631-2,3" and a button labeled "Hide Case List". Below this, the text "Select a case:" is followed by a list of checkboxes and case names:

- 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.

A1.3 Query

The Query screen was modified to provide more options to allow for more refined searching.

The Query screen was modified as follows:

- 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 A1.3.A. 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

Cause of Action

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

First Name Middle Name

Type

A1.4 Redaction Message

The following text was added to the log in screen to remind users of the need to redact certain information:

IMPORTANT: All filings with the court - including attachments - must comply with Fed. R. Civ. P. 5.2 or Fed. R. Crim. P. 49.1: Social Security or taxpayer-identification numbers; dates of birth; names of minor children; financial account numbers; and home addresses in criminal cases, may **not** appear, except as allowed by the applicable rule.

The specific content of the redaction reminder may vary from court to court.

A2 ATTORNEY USERS

A2.1 Adding Documents and Attachments

The process of adding a main document and attachments during docketing has been streamlined to only require one screen, shown below in its initial state as Figure A2.1.A.

The document upload screen changes dynamically based on the number of attachments added, and other actions taken by the user.

Figure A2.1.A. Document Upload Screen – Initial State

Motions
[7:08-cv-00001-FJF Foley v. Davis](#)

Select the pdf document and any attachments.

Main Document

Attachments	Category	Description
1. <input type="text"/> <input type="button" value="Browse..."/>	<input type="text"/>	<input type="text"/>

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 A2.1.B. Document Upload Screen – After Selecting a Main Document and Two Attachments

Motions
[7:08-cv-00001-FJF Foley v. Davis](#)

Select the pdf document and any attachments.

Main Document

C:\Documents and Settings\gibson\Des

Attachments	Category	Description
1. C:\Documents and Settings\gibson\Des <input type="button" value="Browse..."/>	Affidavit <input type="text"/>	<input type="text"/> <input type="button" value="Remove"/>
2. C:\Documents and Settings\gibson\Des <input type="button" value="Browse..."/>	<input type="text"/>	Exhibit A <input type="button" value="Remove"/>
3. <input type="text"/> <input type="button" value="Browse..."/>	<input type="text"/>	<input type="text"/>

If only two attachments should be added, the user should leave the fields in the third row blank and then click **Next**. If additional attachments should be added, the user should click **Browse** for each attachment and then add the document.

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.

The default state for the document upload screen is shown in Figure A2.1.A above. If the user clicks the **Clear** button after adding documents and attachments, the screen will be returned to the default state.

A.2.1.1 Attachment Category and Description

Courts can determine what is required for each attachment: a category, a description, both, neither, or either. If you haven't selected/provided adequate information for each attachment, an error message will prompt you to do so.

A.2.1.2 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.

Figure A.2.1.C. 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
<input type="button" value="View All"/> or <input type="button" value="Download All"/>		5 pages	172 kb

A2.2 General Announcement Emails

Courts now can send general announcement email messages to users with email addresses in CM/ECF. If the court allows you to configure your email settings, you will have the option of opting in to these announcement email messages. However, even if you opt out, the court can force the email announcement to be sent in situations where vital information needs to be distributed.

A2.3 New User Interface for Case Opening and Docketing

The user interface for case opening (if allowed by the court) and 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. During case opening, icons appear in the tree to allow for modifying participant information (such as the party role), and adding attorneys (if allowed by the court), aliases, and corporate parents.

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, as data is not written to the database until the user clicks the **Create Case** button or completes the docketing process.

A2.3.1 The Icons

The following table provides a description for each of the icons that may appear in the participant tree.

Icon	Description
	Delete this party from this case.
	Add new alias, corporate parent, or attorney (only if allowed by the court).
	Copy attorney(s) from other parties in the case to this party (only if allowed by the court).
	Edit the party, alias, corporate parent, or attorney (only if allowed by the court). Only displays beside actual names of participants, so if no participant has been added, this icon is suppressed.

Additionally, the + and – icons for each node expand or collapse the node, respectively.

A2.3.2 Civil Case Opening

The first case opening screen remains unchanged. On the second, the *Nature of suit* and *Cause of action* fields were modified to permit the user to filter the items displayed in the picklist. The user can enter characters in the *Filter* field, which immediately narrows the dropdown list to just the items that match the string entered. To change the filter, the user can type over the characters already entered, or click the **Clear filter** button. The **Clear filter** button, when clicked, returns the contents of the dropdown to the complete list.

Figure A2.3.A. Case Opening – Civil Case Statistical Information Screen

Open Civil Case

Jurisdiction: 3 (Federal Question) [v]

Cause of action: [v] Filter: [] [Clear filter]

Nature of suit: 0 (zero) [v] Filter: [] [Clear filter]

Origin: 1 (Original Proceeding) [v]

Citizenship plaintiff: [v]

Citizenship defendant: [v]

Jury demand: n (None) [v] Class action: n [v] Demand (\$000): []

Arbitration code: [v] County: Scurry [v]

Fee status: pd (paid) [v] Fee date: 12/22/2008 [v] Date transfer: []

[Next] [Clear]

The next screen in civil case opening employs the new user interface. The left partition contains the controls to **Add New Party** and **Create Case**. Since no participants exist for this new case, the tree is empty.

The Expand all hyperlink displays all the participants in the case, once they are added. The Collapse all hyperlink displays only the parties in the case, with the other participants collapsed in the tree. The search fields in the right pane on the screen are unchanged and function as they always have.

Figure A2.3.B. Case Opening – Search for a Party Screen, with Participant Tree Empty

After the user searches for a party, the search results are displayed on the screen, as always, and the user can either select a party from the list or add a new party. The Party Information fields appear next.

Figure A2.3.C. Case Opening –Party Information Screen, with Participant Tree Still Empty

When the user clicks the **Add Party** button on the Party Information screen, the party is added to the participant tree, and nodes for attorney, alias, and corporate parent or other affiliate appear under the party in the tree. Also present in the tree now are functional icons. The right pane of the screen returns to the *Search for a Party* fields.

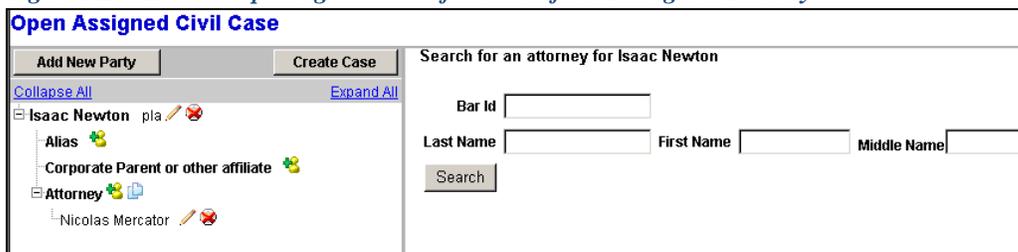
Figure A2.3.D. Case Opening –Party Information Screen, with Party in Participant Tree and Search for an Attorney in Right Pane

If allowed by the court, after searching for, selecting, and adding an attorney, the attorney’s name appears in the participant tree and the right pane of the screen returns to the Search for an Attorney screen. The user can either:

- add another attorney for this party by entering a name and searching,
- add an alias or corporate parent by clicking on the corresponding “add” icon,
- edit the party information by clicking on the pencil “edit” icon,
- delete the party by clicking the red X “delete” icon,
- delete the attorney by clicking the red X “delete” icon, or
- add a new party by clicking on the **Add New Party** button at the top left of the screen.

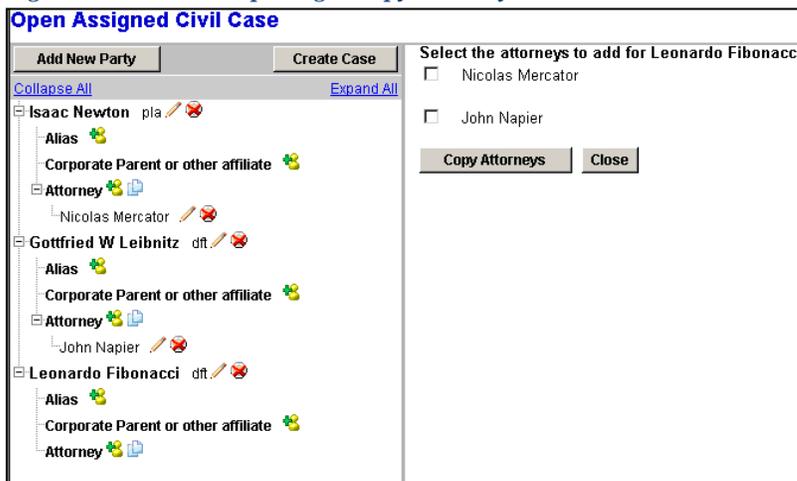
If the user edits a participant, the following message appears in the right pane, to remind the user that changes aren’t saved to the database until the case is submitted: *The changes you made have been temporarily stored for processing. If you need to make more changes, use the case participant tree to navigate. You must click **Update Case** or **Create Case** to save the changes to the case.*

Figure A2.3.E. Case Opening – Status of Screen after Adding an Attorney



After adding more parties, the user can click the “copy” icon to copy attorneys from other parties (if allowed by the court). In the example below, the “copy” icon beside the party Leonardo Fibonacci was clicked, and the user can select one of the already-existing attorneys in the case to add for the party. After selecting one or more attorneys to copy, when the user clicks **Copy Attorneys**, the selected attorney(s) are added to the participant tree under the party.

Figure A2.3.F. Case Opening – Copy Attorneys



Once all participants have been added, the user should click the **Create Case** button. A confirmation message appears, and if the user clicks **Yes**, the case will be created.

A2.3.3 Docketing

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. There are no icon controls for existing participants in the participant tree during docketing so as to maintain the status quo of participant processing. The 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.

A2.3.3.1 Select a Filer

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.

A2.3.3.2 Processing 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.

A2.4 New User Interface for the Email Information Screen

Some courts allow attorneys to modify their email addresses and settings. 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 state of the Email Information screen is shown in Figure A2.4.A below.

Figure A2.4.A. Email Information Screen – Initial State

Email Information for Nicolas Mercator	
Registered e-mail addresses	Configuration options
Primary e-mail address: add new e-mail address	Select an e-mail address to configure.
Secondary e-mail addresses: add new e-mail address	
<input type="button" value="Return to Person Information Screen"/> <input type="button" value="Clear"/>	

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.

Figure A2.4.B. Email Information Screen – Add an Email Address

Email Information for Nicolas Mercator	
Registered e-mail addresses	Configuration options
Primary e-mail address: add new e-mail address	<input type="text"/>
Secondary e-mail addresses: add new e-mail address	
<input type="button" value="Return to Person Information Screen"/> <input type="button" value="Clear"/>	

Once the user enters a complete email address, configuration options appear under the email address 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.

Figure A2.4.C. Email Information Screen – Configuration Options

Email Information for Nicolas Mercator	
Registered e-mail addresses	Configuration options
Primary e-mail address: mercator@mercatorandmercatorinc.com	<input type="text" value="mercator@mercatorandmercatorinc.com"/>
Secondary e-mail addresses: add new e-mail address	Should this e-mail address receive notices? <input checked="" type="radio"/> Yes <input type="radio"/> No
<input type="button" value="Return to Person Information Screen"/> <input type="button" value="Clear"/>	How should notices be sent to this e-mail address? <input checked="" type="radio"/> Per Filing <input type="radio"/> Summary Report
	In what format should notices be sent to this e-mail address? <input checked="" type="radio"/> HTML <input type="radio"/> Text
	Should this e-mail address receive general announcement notices from this court? <input checked="" type="radio"/> Yes <input type="radio"/> No
	<input type="button" value="Show all cases for this e-mail address"/> (Copy case lists from here)
	Case-specific options
	Add additional cases for noticing <input type="text"/>
	These cases will send notice <i>per filing</i> . (default method)
	<input type="button" value="Remove selected cases"/> <input type="button" value="Change selected cases to notice as a summary report"/>
	These cases will send notice <i>as a summary report</i> . (alternate method)
	<input type="button" value="Remove selected cases"/> <input type="button" value="Change selected cases to notice per filing"/>

Following is an explanation of each of the options that appear in Figure 16.4.D.

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: <i>Should this e-mail address receive a “no activity” notice when no summary noticing occurs?</i> 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.

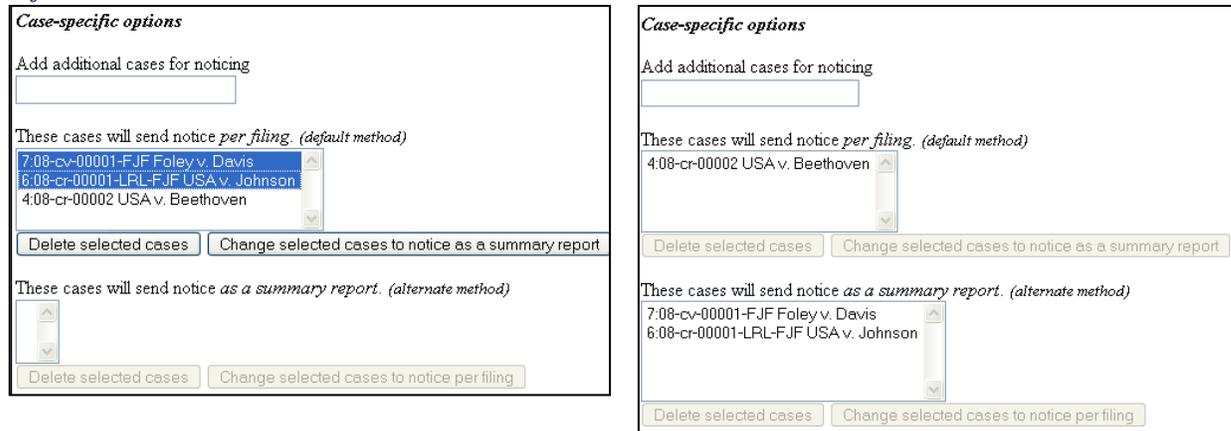
In what format should notices be sent to this e-mail address?	Controls the format of the emails—either HTML or Text .
Should this e-mail address receive general announcement notices from this court?	If No , the user will not receive general court announcement email message unless the court overrides 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 **Delete selected cases** button.

In the screens below, only the bottom right portion of the Email Information screen is shown.

Figures A2.4.D-E. Email Information Screen – Case-specific Options, Before and After Moving Cases from Default Method List to Alternate Method List



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 in the Configuration Options section of the screen. The user can answer **Yes** or **No**.

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.