WHAT’S NEW IN CM/ECF VERSION 4.0
For Attorneys and Public Users

Release 4.0 of the District CM/ECF application contains several enhancements and changes to the system.

The attached document *Version 4.0 Enhancements and Changes* provides detailed information about the following new features:

- Redaction Message
- Rules Change for Deadline Calculation
- Case Opening and Docketing
- Adding Documents and Attachments
- Query
- Maintaining Your Email Information

Version 4.0 Enhancements and Changes
Attorney PACER Users

Redaction Message

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

> **IMPORTANT NOTICE OF REDACTION RESPONSIBILITY:** All filers must redact: Social Security or taxpayer-identification numbers; dates of birth; names of minor children; financial account numbers; and, in criminal cases, home addresses, in compliance with Fed. R. Civ. P. 5.2 or Fed. R. Crim. P. 49.1. This requirement applies to all documents, including attachments.

In addition, a check box with the following text was added to the login screen for users to acknowledge that they have read the redaction notice:

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

Attorney users and pro se litigants must check this new checkbox before logging in. Hyperlinks to the specific Federal Rules of Civil Procedure and Federal Rules of Criminal Procedure that cover the redaction requirements also were added to the login screen.

Rules Change for Deadline Calculation

Effective December 1, 2009, the Federal Rules for how deadlines are computed will be changed. Prior to this change, a deadline set for 10 or fewer days is computed by skipping weekends and holidays. A deadline set for 11 or more days is computed using calendar days. With the rules change, all deadlines will be calculated using calendar days only. If the calculated date falls on a weekend or holiday, it is extended until the next working day, just as it was prior to the rules change. In accordance with the provisions of Rule 6(d) of the Federal Rules of Civil Procedure, three days for service will continue to be added to the deadline calculation.

Case Opening and Docketing

The user interface for case opening 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, aliases, and corporate parents.

> 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.
>
> IMPORTANT

Icons

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

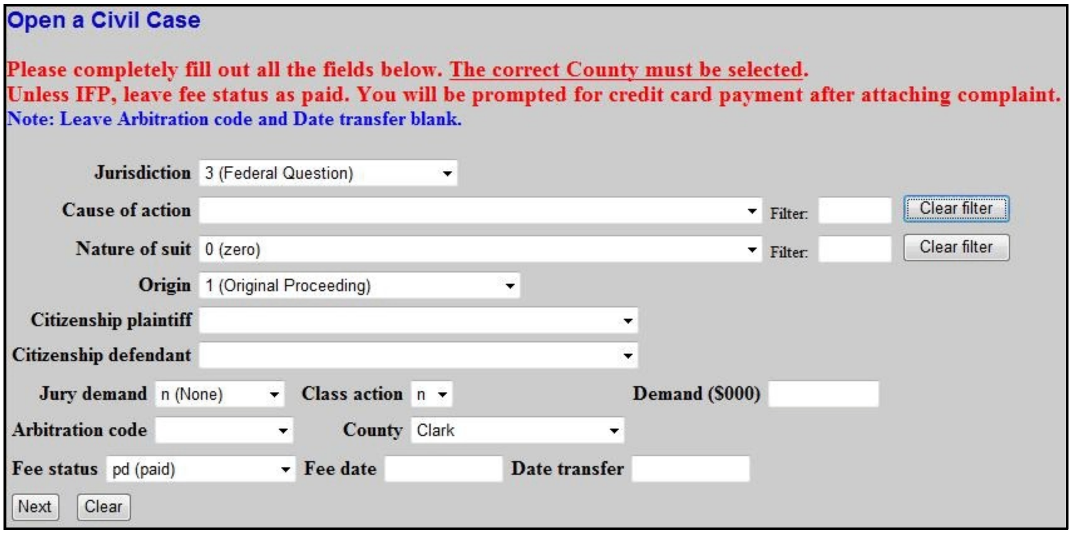
Icon	Description
	Delete this party from this case.
	Add new alias, corporate parent, or attorney.
	Copy attorney(s) from other parties in the case to this party.
	Edit the party, alias, corporate parent, or attorney. Only displays beside actual names of participants, so if no participant has been added,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

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

Civil Case Opening

On the first case opening screen, 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.

Case Opening – Civil Case Statistical Information Screen



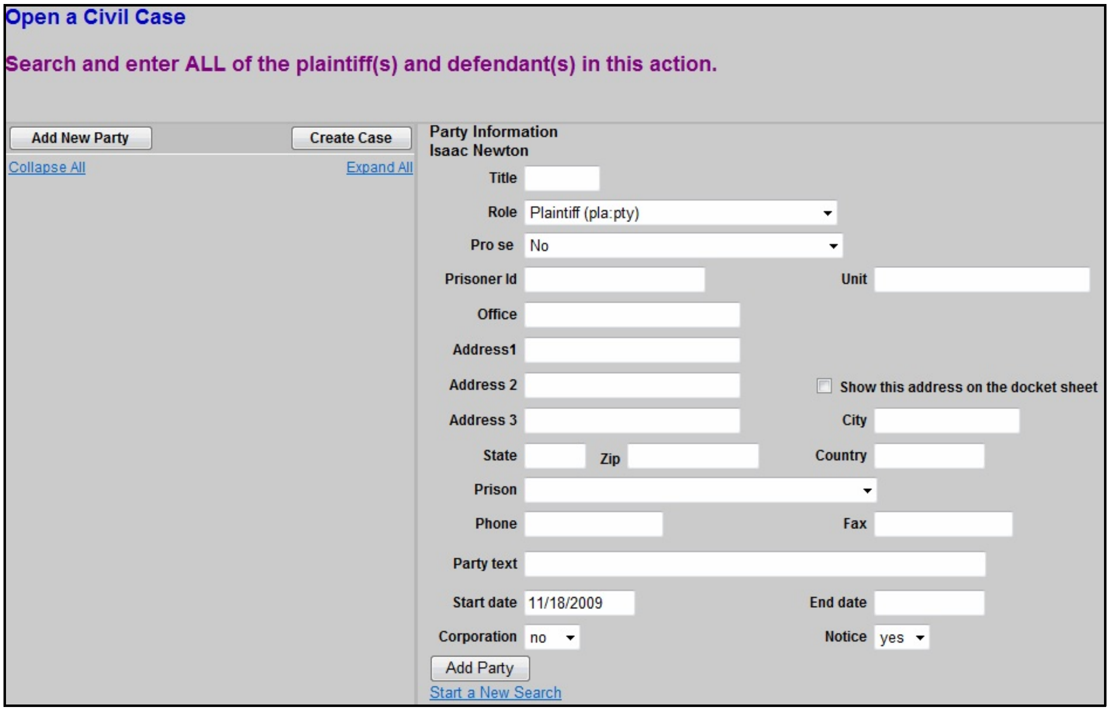
The next screen in civil case opening employs the new user interface. The left partition contains the controls to **Add New Party** and **Create Case**. Since no participants exist for this new case, the tree is empty.

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.

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.

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.

Case Opening –Party Information Screen, with Party in Participant Tree and Search for an Attorney in Right Pane

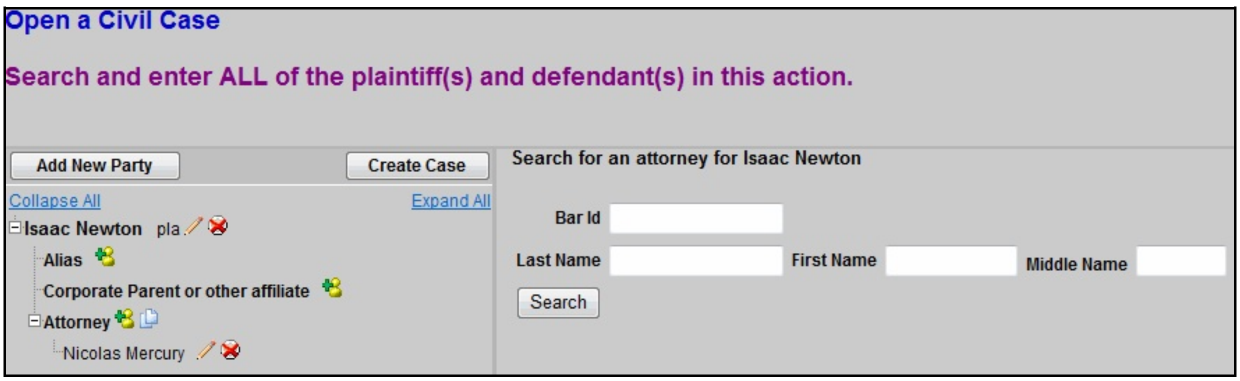
After searching for, selecting, and adding an attorney, attorney's name appears in the participant tree and the right pane of the screen returns to the Search for an Attorney screen.

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.

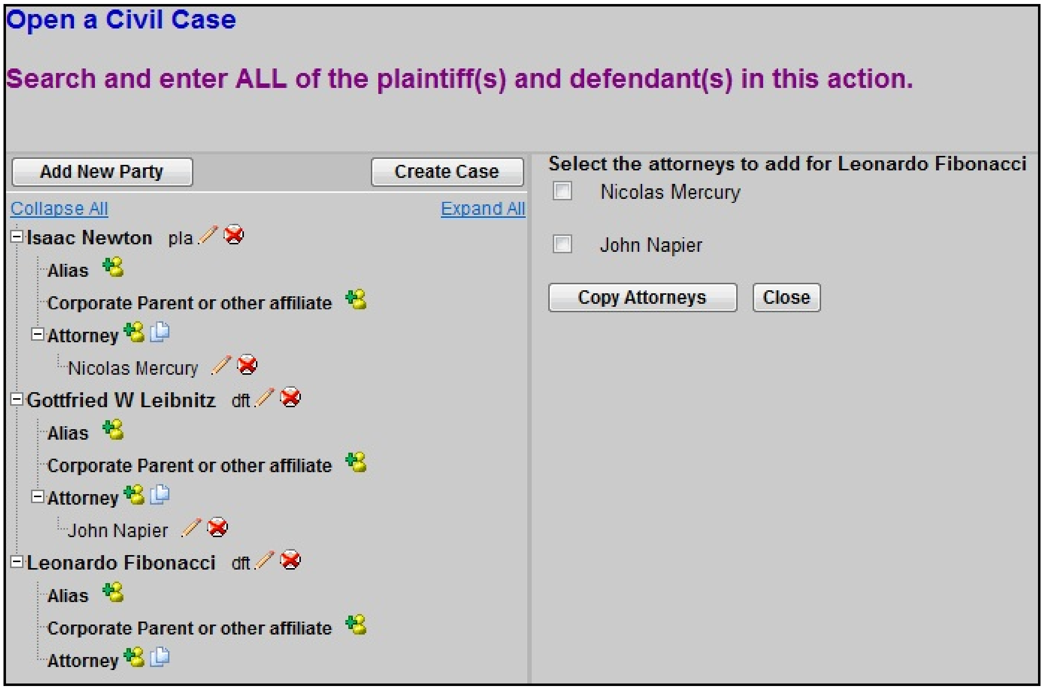
If the user edits a participant, the following message appears in the right pane, to remind the user that changes aren’t saved to the database until the case is submitted: *The changes you made have been temporarily stored for processing. If you need to make more changes, use the case participant tree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

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. 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.

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.

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.

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.

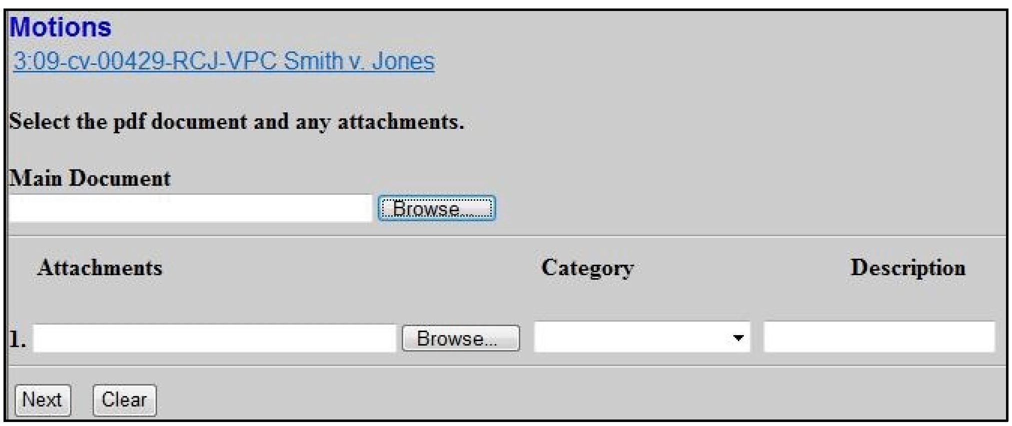
Processing a Large Case (Civil Only)

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.

Adding Documents and Attachments

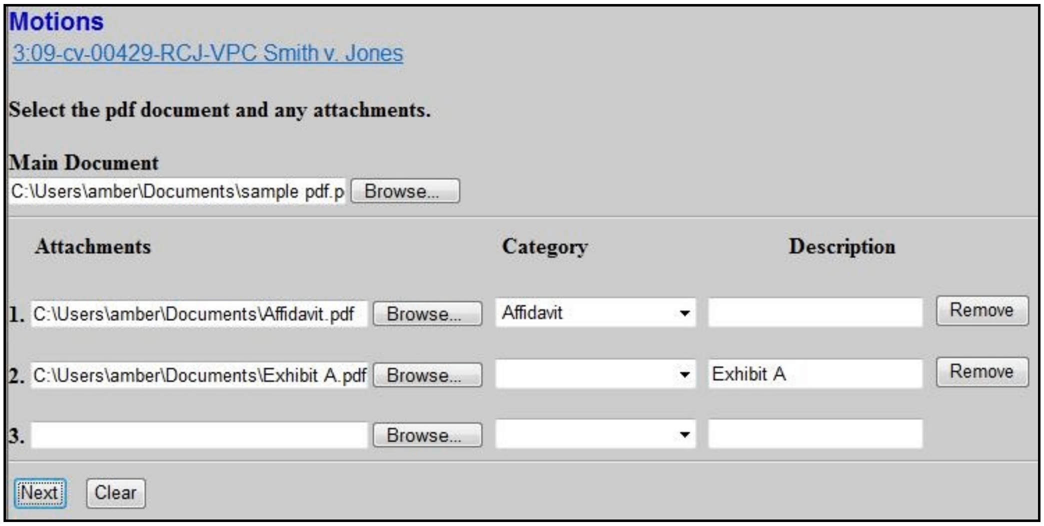
The process of adding a main document and attachments during docketing has been streamlined to only require one screen, shown below in its initial state. The document upload screen changes dynamically based on the number of attachments added, and other actions taken by the user.

Document Upload Screen - Initial State



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.

Document Upload Screen - After Selecting a Main Document and Two Attachments



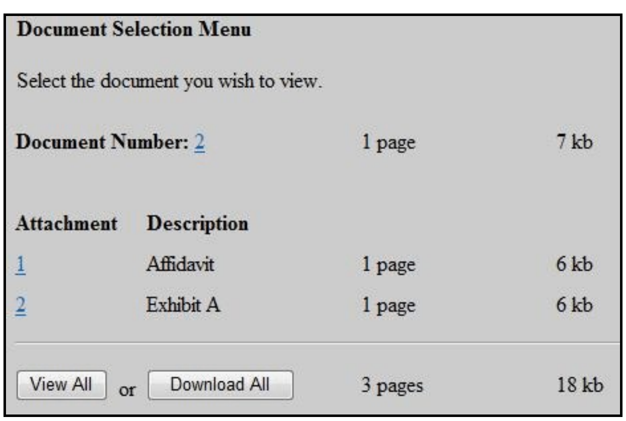
If only two attachments should be added, the user should leave the fields in the third row blank and then click **Next**. If an attachment should be removed, the user should click **Remove**. If, for example, Attachment 1 is removed and there is a second attachment, Attachment 2 would become Attachment 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. If the user clicks the **Clear** button after adding documents and attachments, the screen will be returned to the initial state.

Document and Attachment Numbering

The document selection screen was modified to include the main document number, and the attachments are numbered beginning with 1. 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 the documents for a docket entry are displayed on the document selection screen.

Document Selection Screen



Query

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

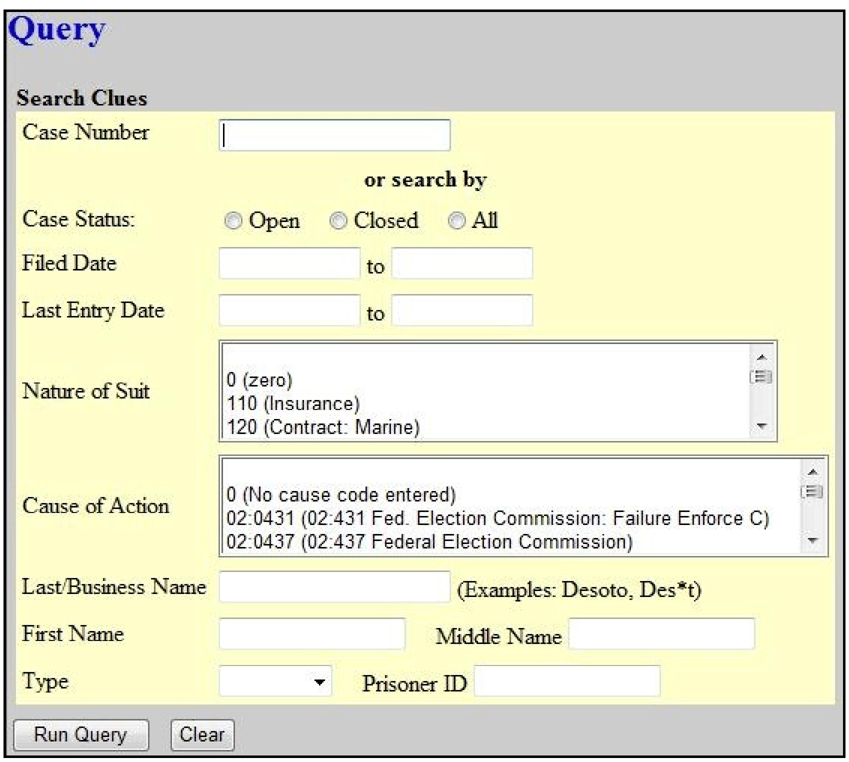
The Query screen was modified as follows:

- 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

Query Selection Criteria Screen

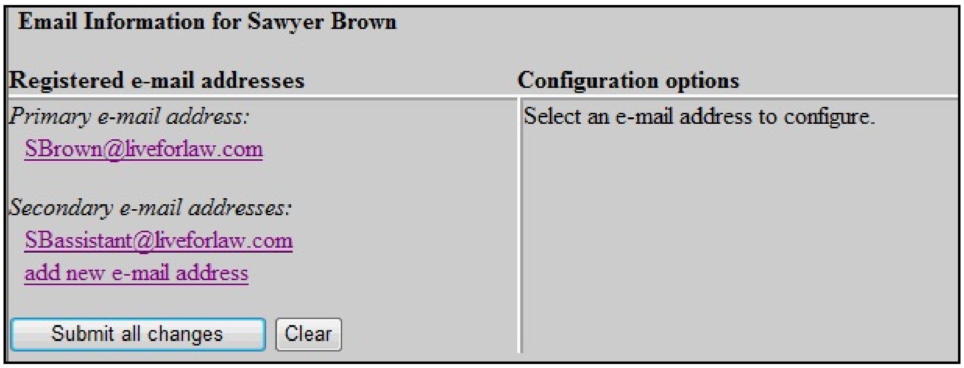


Maintaining Your Email Information

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.

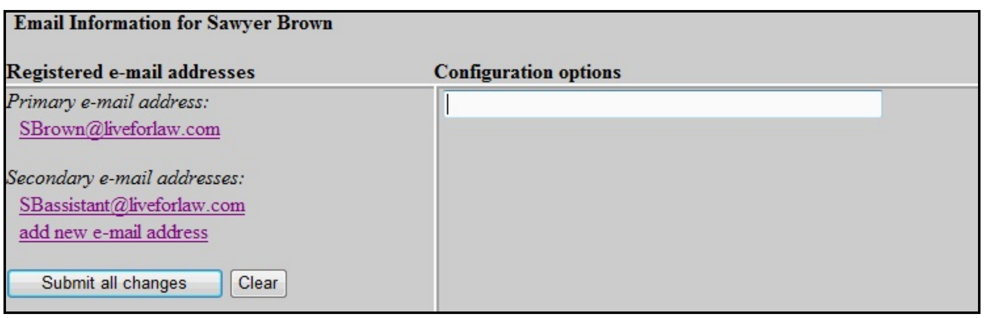
The initial state of the Email Information screen is shown below.

Email Information Screen – Initial State



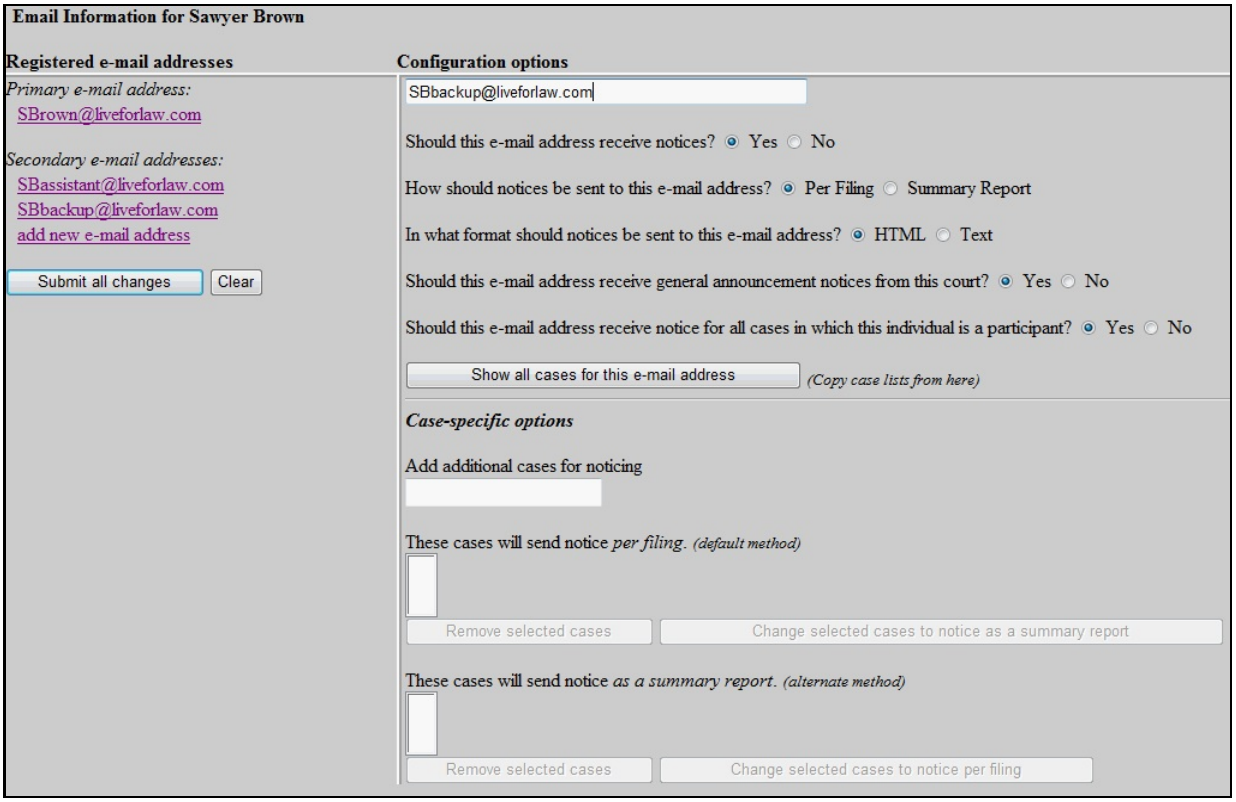
The initial Email Information screen is divided into two sides. On the left side, there are two add new email address hyperlinks—one for the primary email address and one for the secondary email addresses. When the user clicks the add new e-mail address hyperlink for the primary email address, a text field appears on the right side of the screen. The user should enter his/her e-mail address in this field.

Email Information Screen – Add an Email Address



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.

Email Information Screen – Configuration Options



Following is an explanation of each of the options that appear above:

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: *Should this e-mail address receive a "no activity" notice when no summary noticing occurs?* 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**.

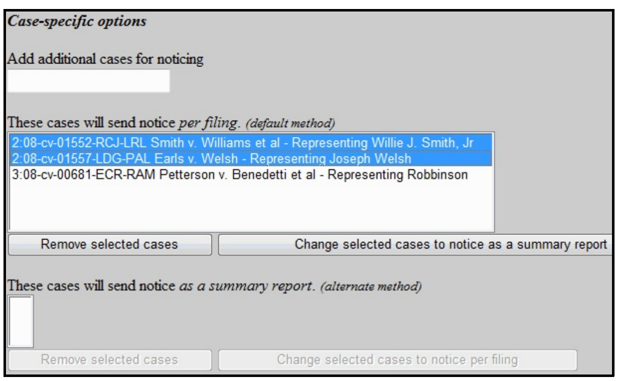
Should this e-mail address receive general announcement notices from this court?	If **No**, the user will not receive general court announcement email message unless the court overrides the user's preference (e.g., the message is urgent and must be sent to all users).
Show all cases for this e-mail address	Displays a list of all of the cases for which the user is configured to receive NEFs

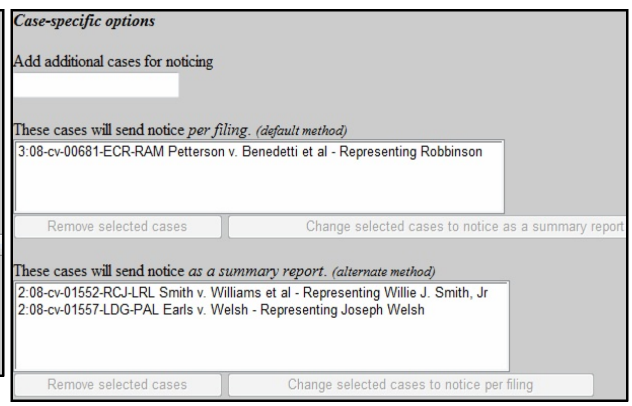
To receive NEFs in additional cases, enter the case number(s) in the *Add additional cases for noticing* text field and then either click **Enter** or **Find This Case**. After selecting the appropriate case(s), click **Add case(s)**. This will add the case(s) to the list of cases in the default method 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.

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.