

# **CM/ECF Version 6.1**



## **USER GUIDE FOR ATTORNEYS**

December 2014

The District of South Dakota will be upgrading to Version 6.1 of CM/ECF on Saturday December 13, 2014. The new version contains features related to the following:

- **Query**
- **Links to Other Court PACER Sites and the PACER Case Locator from within CM/ECF**
- **Docket Report**
- **RSS Feed**
- **Mobile Query**

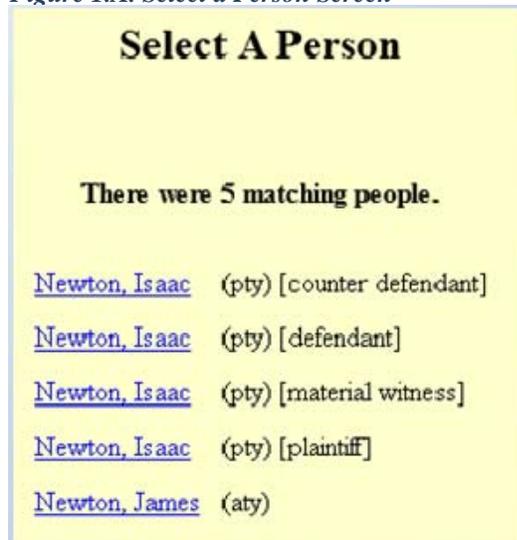
## 1 Query

When a user clicks on Query on the blue menu bar in CM/ECF they are rerouted to a PACER Login screen. After the user logs into PACER, they will see the following new message on the Query selection criteria screen:

**WARNING: Search results from this screen are NOT subject to the 30 page limit on PACER charges. Please be as specific as possible with your search criteria.**

Party roles are now displayed beside party names listed on the **Select A Person** query screen. The party's role will appear in brackets after the **(pty)** designation for each party (see Figure 1.A, below).

*Figure 1.A. Select a Person Screen*



When the user selects a party from the **Select a Person** screen, the sub-header on the **Select a Case** screen now includes the party's role information (see Figure 1.B, below).

Figure 1.B. Select a Case Screen (Top Portion)

**Select A Case**

**Isaac Newton is a plaintiff in 21 cases.**

<a href="#">1:08-cv-00408-EDE-TCT</a>	Newton v. Leibnitz et al	filed 08/17/08
<a href="#">1:08-cv-01047-AAA</a>	Newton v. Descartes	filed 12/05/08

The **Query Selection** screen now includes an *Exact Matches Only* checkbox beside the *Last/Business Name* field. If this option is checked, the results include only exact matches to the search string entered in the *Last/Business Name* field.

Figure 1.C. Query Selection Screen

**Query** [Mobile Query](#)

**Search Clues**

Case Number

or search by

Case Status:  Open  Closed  All

Filed Date  to

Last Entry Date  to

Nature of Suit  
110 (Insurance)  
120 (Contract: Marine)  
130 (Miller Act)

Cause of Action  
02:0431 (02:431 Fed. Election Commission: Failure Enforce C)  
02:0437 (02:437 Federal Election Commission)  
05:0075 (05:75(2) Contract - Reduction in Grade)

Last/Business Name   **Exact matches only**

First Name  Middle Name

Type

## 2 Links to Other Court PACER Sites and the PACER Case Locator from within CM/ECF

The new **Links to Other Courts** utility menu item points to a court links page on the PACER Service Center website so PACER users can more easily navigate from one court to another to look at documents without having to access the PACER Service Center website outside of CM/ECF. The new **PACER Case Locator (National Index)** utility menu item points to the PACER Case Locator on the PACER Service Center website.

Both the **Links to Other Courts** and the **PACER Case Locator (National Index)** links open in separate windows.

Following are some scenarios where a PACER user may or may not have to enter his or her login information when clicking on either of these two new links:

- If a user who is logged in to CM/ECF as a PACER user clicks on the **PACER Case Locator (National Index)** link, the user will not be required to enter his or her login information.
- If a user is logged in to the PACER Service Center site, the user can access all court links as well as the **PACER Case Locator (National Index)** link without having to enter his or her login information again.
- If a user does not have a PACER ID when initially logging in to CM/ECF, the user will be prompted to log in at the PACER Case Locator site or any other court via the **Links to Other Courts** link.

### 3 Docket Report

- If an attorney has an inactive email address, the label (*Inactive*) now appears beside the email address for that attorney on the docket sheet.
- The *View Multiple Documents* option on the Docket Report selection screen (see Figure 3.A, below) provides checkboxes for each of the docket entries, and the user can select specific docket entries and then either view or download the associated documents, which are contained in a combined PDF document. The **View Selected** button at the bottom of the docket sheet is not active until the user selects at least one docket entry.

Figure 3.A. Docket Report Selection Screen

**Docket Sheet**

Case Number  
5:05-cr-50049-JLV-1 - Zastany, Robert

Filed  to   
 Entered  to

Documents  to

Go to Document  or PageID

**Include:**  
 Parties and counsel  
 Terminated parties  
 List of member cases  
 Links to Notices of Electronic Filing

**Document options:**  
 Include headers when displaying PDF documents  
 View multiple documents

Sort by Oldest date first

Run Report Clear  Make these options my default.

Figure 3.B. View Selected Documents Selection Screen

03/07/2012	 <a href="#">6</a>	<input checked="" type="checkbox"/>	MEMORANDUM in Support re <a href="#">5</a> MOTION to I James) (Entered: 03/07/2012)
03/07/2012	 <a href="#">5</a>	<input checked="" type="checkbox"/>	MOTION to Dismiss by South Dakota Departmen
02/17/2012	 <a href="#">4</a>	<input type="checkbox"/>	Summons Issued as to South Dakota Department o (SLW) (Entered: 02/17/2012)
02/17/2012	 <a href="#">3</a>	<input type="checkbox"/>	Filing fee received: Fee Amount: \$ 350, Receipt #:
02/17/2012	 <a href="#">2</a>	<input type="checkbox"/>	CIVIL COVER SHEET (SLW) (Entered: 02/17/2
02/17/2012	 <a href="#">1</a>	<input type="checkbox"/>	COMPLAINT with Jury Demand., filed by Kathy

or

## 4 RSS Feed

The RSS feed software included with CM/ECF has been changed to report all activity for the last 24-hour period, regardless of the number of records. This information is pulled once per hour.

## 5 Mobile Query

The mobile PACER Case Locator (PCL) is now linked to CM/ECF. The mobile query interface offers a simplified user experience optimized for display on mobile devices. This interface incorporates the following functions:

- Search interface
- Party selection from party name search result list
- Case selection from case search result list based on case or party name search
- Attorney information for selected case
- Party information for selected case
- Deadlines/Hearings for selected case
- Docket entries for selected case
- PACER login

## Accessing the Mobile Query

Users can access the mobile query via one of the following locations in CM/ECF:

1. The [Mobile Query](#) link on the Query Selection Criteria Screen.

Figure 5.A. Query Selection Criteria Page

**Query**

**WARNING: Search results from this screen on PACER charges. Please be as specific as**

**Search Clues** [Mobile Query](#)

Case Number

or search by

Case Status:  Open  Closed  All

Filed Date  to

Last Entry Date  to

Nature of Suit

- 110 (Insurance)
- 120 (Contract: Marine)
- 130 (Miller Act)

Cause of Action

- 02:0431 (02:431 Fed. Election Commission: Failure Enforce C)
- 02:0437 (02:437 Federal Election Commission)
- 05:0075 (05:75(2) Contract - Reduction in Grade)

Last/Business Name   Exact matches only

First Name  Middle Name

Type

2. The [Mobile Query](#) link on the Query Results Screen.

Figure 5.B. Query Results Screen

**ECF** Cjvil Criminal Query

[Mobile Query](#)

**Query**

- [Alias](#)
- [Associated Cases](#)
- [Attorney](#)
- [Case File Location...](#)
- [Case Summary](#)
- [Deadlines/Hearings...](#)
- [Docket Report ...](#)
- [Filers](#)
- [History/Documents...](#)
- [Party](#)
- [Related Transactions...](#)
- [View a Document](#)

3. Users can also access the mobile query from a case link from the mobile PACER Case Locator (PCL).

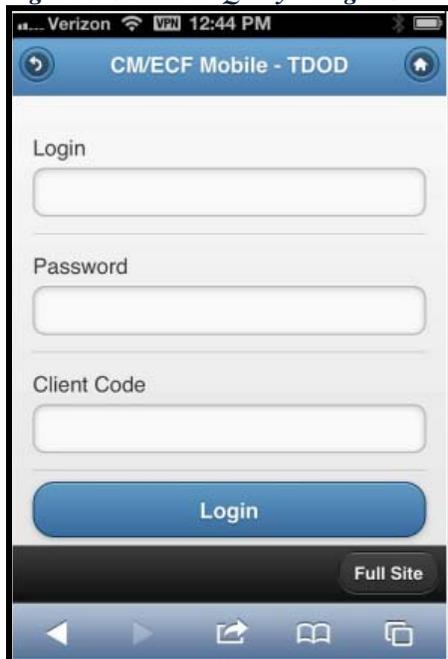
## Mobile Query User Interface

All interfaces in the mobile query include five elements on each page:

1. back button;
2. title *CM/ECF Mobile* — appended by a capitalized short title court name;
3. **logout** button;
4. court home page button;
5. search field for party name or case searches.

When clicked, the **logout** button redirects to the mobile query version of the PACER-only login page (see Figure 5.C). The **logout** button is not available on this login screen.

**Figure 5.C. Mobile Query—Login Screen**



The default search screen contains one text field that allows users to search by case number, party name, or attorney (see Figure 5.D). However, the mobile query site is optional, and users can choose to access the full CM/ECF site from their mobile devices. At the bottom of each page, a **Full Site** button provides access to the standard-formatted application interface page, equivalent to the current mobile query page (see Figure 5.E). If the user clicks the **Full Site** button, the full site is set as the default for as long as the browser cookie called *uiexperience* persists, which is roughly twelve hours.

If any specific page generates a PACER billing receipt, a summary form of the billing information is displayed in the black bar along the bottom of the page.

Figure 5.D. Mobile Query—Default Search Screen

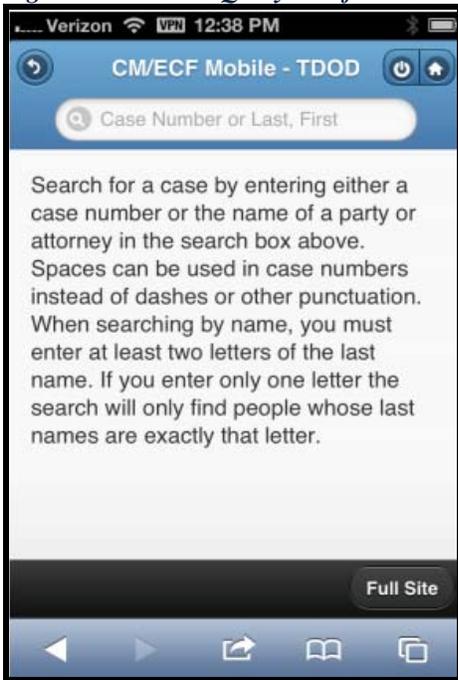
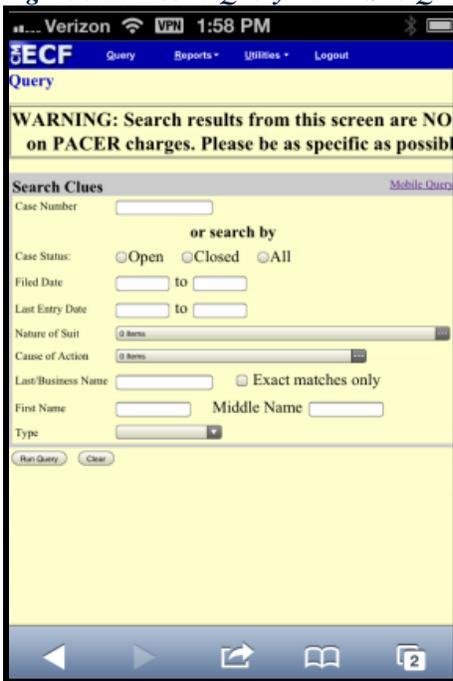


Figure 5.E. Mobile Query—Full Site Query Criteria Screen



## Using the Default Search Screen in Mobile Query

### Name Searches

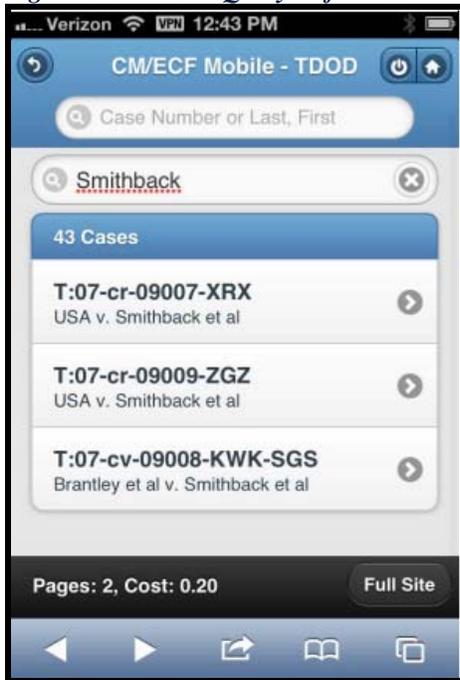
For name searches, the required format is *Last Name, First Name*, where a comma separates the two parts. The first name is optional. When searching by name, the user must enter at least two letters of the last name. If only one letter is entered, the search will only find parties or attorneys whose last names are exactly that letter.

If a party name search returns more than one possible match based on the criteria provided, the mobile interface presents the user with a list of all matching names and requires the user to select a specific name (see Figure 5.F). If more than eight results are returned on any query page (excluding the docket entries page), above the list, an on-page filter allows the user to search the results already downloaded to the browser (see Figure 5.G). This does not affect PACER billing.

*Figure 5.F. Mobile Query Default Search Results—Multiple Names in Results*



**Figure 5.G. Mobile Query Default Search Results—Using the Filter**



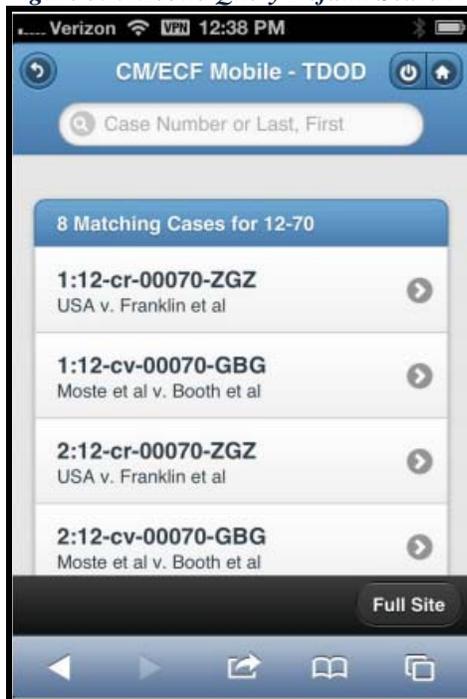
If only one case is linked to a specific name, the case query result for that case is returned (see Figure 5.H).

**Figure 5.H. Mobile Query— Full Site Query Result Screen**



If one name matches the initial search but is linked to multiple cases, or if a user selects a name from the result list of a multi-response search, a list of cases associated with that party is displayed (see Figure 5.I). When a case is selected from this list, the case query result page is displayed.

*Figure 5.I. Mobile Query Default Search Results—Multiple Cases in Search Results*



## Case Searches

Entering a numeric search term triggers a case number search; if an alphanumeric search term is entered, it triggers a party or attorney name search. If a case number search returns no results, the system automatically runs a name search using the same terms. Spaces can be used in case numbers instead of dashes or other punctuation.

The access restrictions used to search for a case are the same in the mobile query application as in the main CM/ECF application. Therefore, if users do not have access to a case, they will see the same error messages or additional information as they would if accessing the main CM/ECF application.

If a case search returns more than one possible match based on the criteria provided, the mobile interface presents the user with a list of all matching cases and requires the user to select a specific case before proceeding to the case query result screen (see Figure 5.I above). When a case is selected from this list, the case query result for that specific case is displayed.

If only one case matches the case criteria provided, the case query result page is displayed (see Figure 5.H. above).

The case number search does not generate a PACER billing receipt, since the standard query application does not bill for the case number lookup. In the mobile query interface, there is no in-line case number lookup like in the standard query interface. The interim case selection page is therefore provided to facilitate this process, but does not bill.

## Case Query Results

When a search is run, the Mobile Query displays results in the case query result page (see Figure 5.J). This screen presents the following information:

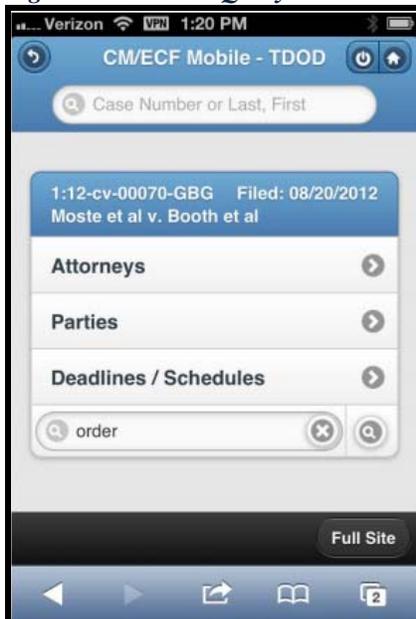
- case number, short title, and date filed;
- link to see attorney information in the case;
- link to see party information in the case;
- link to see deadline/hearing information in the case;
- link to show all docket entries, and the number of docket entries that will be shown;
- search icon that brings up a search box to find docket entry information that matches the text entered (see Figure 5.K).

The Case Query Results screen is analogous to the full site Query result page, which does not produce a PACER billing receipt. Billing will occur based on additional selection from this page.

**Figure 5.J. Mobile Query—Case Query Result**



**Figure 5.K. Mobile Query—Docket Entry Text Search**

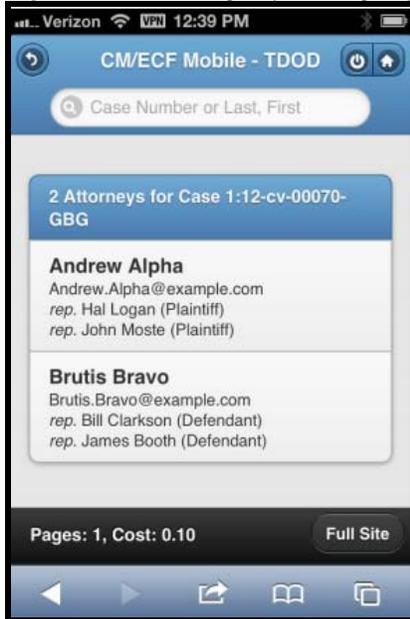


## Detailed Case Information Displays

Attorneys, parties, deadlines, and docket entries are listed in similarly formatted lists that wrap to fit on small screens (see Figures 5.L through 5.Q).

Each list header shows the case number, item listed, and the number of matches. If more than eight items appear in the list, a *Filter Items* search box at the top of the list allows the user to narrow down the list. This *Filter Items* search box is available on all case details except for docket entries. The user is billed for receiving the total data, not for using this filter to hide data already received.

*Figure 5.L. Mobile Query Case Query Result—Attorney Information*



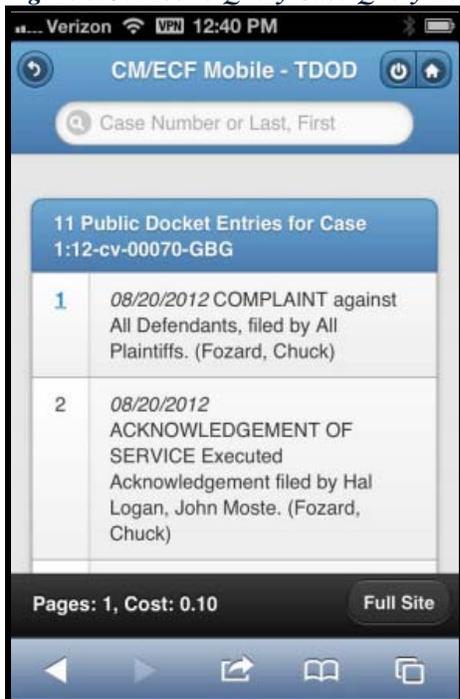
*Figure 5.M. Mobile Query Case Query Result—Party Information*



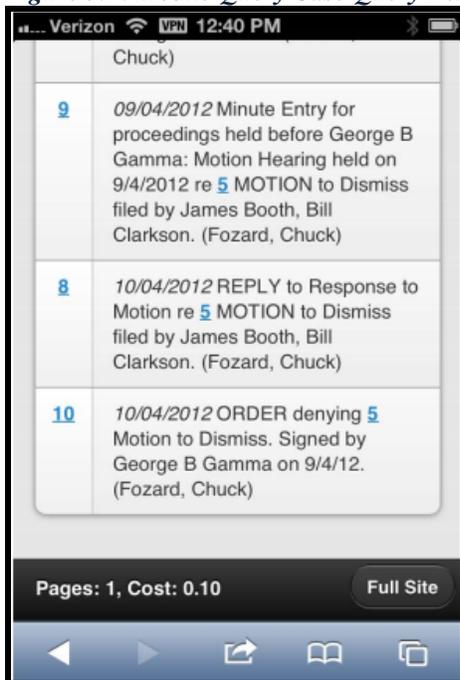
Figure 5.N. Mobile Query Case Query Result—Deadline/Schedule Information



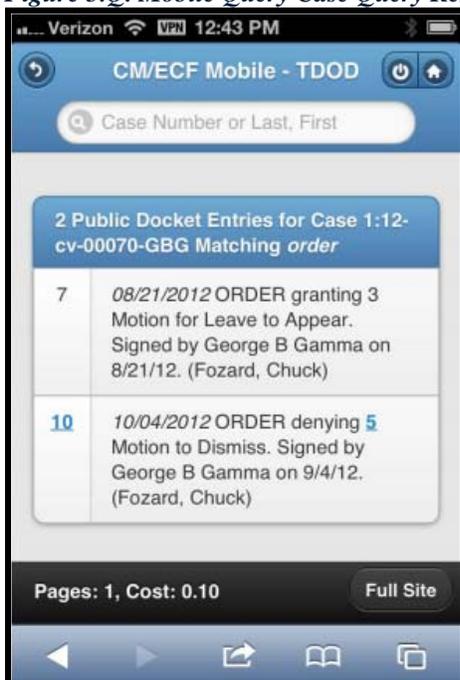
Figure 5.O. Mobile Query Case Query Result—Docket Entries Information



*Figure 5.P. Mobile Query Case Query Result—Docket Entries with Embedded Links*



*Figure 5.Q. Mobile Query Case Query Result—Docket Entries Using Text Search*



The docket entry information includes document numbers, the filed date, and the docket text. For documents, the document number appears in its own cell on the left. The entire cell is clickable to make clicking the link easier on small screens. Clicking on a document takes the user to familiar CM/ECF screens to view the document (see Figure 5.R below).

