

Version

**3.1**

Effective  
October 22, 2007

UNITED STATES DISTRICT COURT – DISTRICT OF COLORADO  
Electronic Case Files

# ELECTRONIC CASE FILING USER MANUAL

# SUMMARY OF CHANGES

## VERSION 3.0 (EFFECTIVE DATE- SEPTEMBER 11, 2006)

ATTORNEY/PARTY ASSOCIATION (LINKING) CHAPTER 5

THE LEAD AND NOTICE CHECK BOXES HAVE BEEN REMOVED

MAINTAIN YOUR E-MAIL CHAPTER 8

ATTORNEYS NO LONGER GO THROUGH THE NAME/ADDRESS SCREEN.

ATTORNEYS HAVE A MULTIPLE OPTIONS FOR THE PRIMARY AND SECONDARY E-MAIL ADDRESSES AS TO HOW NOTICES OF ELECTRONIC FILINGS ARE SENT.

MAINTAIN YOUR LOGIN/PASSWORD CHAPTER 8

ATTORNEYS NO LONGER GO THROUGH THE NAME/ADDRESS SCREEN TO CHANGE THEIR PASSWORD.

## VERSION 3.1 (EFFECTIVE DATE- OCTOBER 22, 2007)

VERSION 3.1 OF CM/ECF PROVIDES A NUMBER OF CHANGES THAT AFFECT BOTH INTERNAL AND EXTERNAL USERS. SOME CHANGES ARE MINOR AND HAVE VITRUALLY NO IMPACT OR CHANGES FOR THE USERS. OTHER CHANGES ARE THE ADDITON OF NEW OR MORE EFFICIRENT FUNCTIONALITY. THE TABLE BELOW LISTS THE CHANGES THAT HAVE VISUAL AND FUNCTIONAL IMPACTS.

FEATURE/FUNCTION	DESCRIPTION	IMPACT	COMMENT
<b>CASCADING MENUS</b>	<b>A</b> CASCADING MENU SYSTEM HAS BEEN ADDED TO THIS RELEASE. USERS HAVE THE OPTION OF USING THE NEW CASCADING MENUS AND/OR <b>CONTINUE TO USE THE EXISTING STATIC MENUS</b> . <b>ALLOWS</b> USERS TO NAVIGATE FROM ANY PLACE IN CM/ECF TO ANY OTHER FEATURE WITHOU T THE NEED TO NAVIGATE THROUGH NUMEROUS OPTIONS AND SCREENS.	<b>LOW</b>	SEE APPENDIX 3. THE IMPACT IS LOW, BUT YOU CAN SAVE TIME RBY BYPASSING INTERMEDIATE SCREENS TO GET TO THE ONE YOU ACTUALLY WANT.
<b>CASE NUMBER ENTRY AND SEARCH OPTIONS</b>	TO REDUCE INTERMEDIATE SCREENS, VERSION 3.1 PROVIDES A DIFFERENT METHOD TO ENTER AND SELECT CASE NUMBERS WHETHER YOU ARE DOING A QUERY OR ENTERING A CASE NUMBER FOR DOCKETING.	<b>HIGH</b>	CHAPTERS 5, 6, AND 9
<b>SEARCH FOR MENUS AND EVENTS.</b>	Allows the user to search for an event. After <b>[clicking]</b> on the <b>Search</b> option in the Blue Menu Bar, a search window is displayed. Enter all or part of the name of the event to be found. For example, to find an <b>Objection to Report and Recommendations</b> event, type "objection" in the box and click the Search button.	<b>MEDIUM - HIGH</b>	SEE APPENDIX 3
<b>EVENT SEARCH AND SELECT OPTIONS FROM SPECIFIC CATEGORIES</b>	ONCE A USER IS IN A CATEGORY, SUCH AS " <b>MOTIONS</b> ", THE EVENTS IN THE LIST CAN BE SEARCHED AND THE SELECTION PROCESS HAS CHANGED TO FACILTATE MORE <b>CLARITY</b> .	<b>MEDIUM - HIGH</b>	CHAPTERS 5 AND 9

<b>DOCKET REPORT/SHEET AND PRINTING OR DOWNLOADING PDF DOCUMENTS</b>	<b>THERE ARE NEW FEATURES AVAILABLE T YOU WHEN YOU RUN A DOCKET SHEET/REPORT. ONE OF THE OPTIONS IS TO CREATE A PDF COPY OF THE DOCKET SHEET/REPORT FOR VIEWING AND ALLOWS YOU THE ABILITY TO SAVE AND/OR PRINT THE DOCKET SHEET AS A PDF.</b>  <b>ANOTHER FEATURE IS THE ABILITY TO BE ABLE TO SELECT MULTIPLE DOCUMENTS FROM THE DOCKET SHEET AND VIEW/PRINT THEM COLLECTIVELY.</b>	<b>MEDIUM</b>	SEE CHAPTER 7
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# Table of Contents

<b>CHAPTER 1 – INTRODUCTION</b>	ECF System Capabilities	1
	Help Desk	1
	Computer and Equipment Requirements	1
	Registering for Access to ECF	2
<b>CHAPTER 2 – PREPARATION</b>	Adobe Acrobat Reader	3
	Portable Document Format (PDF)	3
<b>CHAPTER 3 – BASICS</b>	User Interactions	5
	Conventions Used in This Manual	5
	Common Mistakes When Filing a Document	5
	Viewing Transaction Log	5
	User Manual	6
<b>CHAPTER 4 – ECF SYSTEM</b>	Entering the ECF System	7
	Logging in to the ECF System	8
	ECF Menu Features	9
	Basic Manipulations	9
	Steps Related To Filing Documents in Civil/Criminal Cases	10
<b>CHAPTER 5 – CIVIL CASE DOCKETING</b>	Filing a Civil Case Initiating Document	11
	Filing an Answer	11
	Filing a Motion	21
	Filing a Brief in Support of a Motion	30
	Submitting a Proposed Order	37
	Sealed Document Submission	38
	Privacy Policy	38
	Motion Practice	38
	Combining Documents	38
	Objections to Magistrate Judge Findings and Rulings	39
	Filing a Return of Service	39
<b>CHAPTER 6 – QUERY</b>	Query Entry Screen	40
	Case Number entry and Query	41
	Case Specific Query Options	44
	Name Search (Person Query)	45
	Date Filed and Nature of Suit Query	45
<b>CHAPTER 7 – REPORTS</b>	Docket Sheet	46
	Civil Cases Report	50
	Calendar Events Report	51
	Docket Activity Report	52
	Criminal Cases Report	54
	Judgment Index Report	55
	Written Opinions Report	56
	Civil and Criminal Events Report	56
<b>CHAPTER 8 – UTILITIES</b>	Maintain Your E-Mail	57
	Maintain your Login/Password	69
	View Your Transaction Log	70
	Mailings (How Parties will be noticed from ECF)	71
	ECF Logout Feature	72
<b>CHAPTER 9 – CRIMINAL CASE DOCKETING</b>	Filing a Motion	73
	Filing a Brief in Support of a Motion	85
	Submitting a Proposed Order	93
	Sealed Document Submission	93
	Privacy Policy	93
<b>APPENDICES</b>	Appendix 1 – ECF Quick Reference Guide	94
	Appendix 2 – Ten Most Common Filing Mistakes	96
	Appendix 3 – Additional Version 3.1 Changes	97

## **Chapter 1** **Introduction**

This manual provides instructions on how to use the Electronic Case Files (ECF) system to file documents with the court, and to view and retrieve docket sheets and documents. Users should have a working knowledge of an ECF compatible web browser and Adobe Acrobat for creating and reading Portable Document Files (PDF).

### **ECF System Capabilities**

Registered users with a compatible web browser and access to the Internet can perform the following functions, almost twenty-four hours a day, seven days a week:

- Electronically transmit a document to the clerk's office in cases without incurring additional filing costs;
- View official docket sheets and other documents associated with these docket sheets, including immediate viewing of a document just submitted to the court;
- Compile and view various reports for cases on the court's docket;
- Query case information; and,
- Update and maintain user passwords and e-mail addresses.

### **Help Desk**

For assistance in using ECF, including technical difficulties, call the Court's Help Desk toll free at 866-365-6381 or 303-335-2050 between the hours of 8:00 a.m. and 5:00 p.m. Mountain Time, Monday through Friday, excluding federal holidays. The Help Desk may also be contacted by e-mail at **[cod\\_cmecf@cod.uscourts.gov](mailto:cod_cmecf@cod.uscourts.gov)**.

### **Computer and Equipment Requirements**

The following hardware and software are needed to electronically file, view, and retrieve case documents in ECF.

- A personal computer running a standard operating system such as Microsoft Windows or Macintosh with a dial-up modem supporting at least a transfer rate of 56k.

**Note: A dial-up modem connection is usually not fast enough to transmit and receive documents electronically or to download large documents attached to e-mails or filed in ECF. Other alternatives include, cable, digital subscriber lines (DSL), satellite, and wireless internet connectivity. Although more expensive, these technologies provide definitive advantages over traditional dial-up methods.**

- An Internet Service Provider and web browser. The Court has verified that its installed version of ECF is compatible Netscape 7.2, Internet Explorer 6.0 and 7.0, and Mozilla Firefox 1.5 and 2.0

**Note: Users of ECF have experienced some compatibility issues with versions of Netscape Navigator lower than 4.6; America On-Line's version of Netscape Navigator; and versions of Internet Explorer other than IE 6.0/7.0**

- Adobe Acrobat or other portable document format (PDF) conversion software to convert documents from the format of their native application to PDF. Documents converted directly from word processing are known as "PDF text" or "native PDF" documents.
- A scanner if you cannot electronically prepare your documents and convert them directly to PDF. Use a scanner to convert paper documents to digital format for electronic transfer. PDF documents created by scanning paper documents are known as "PDF image" documents.

**Note:** When scanning documents for ECF, scan at a resolution of 200 to 240 dpi. Scanning at resolutions greater than 240 dpi tends to clutter the electronic transfer with unwanted markings and print. Also, higher resolutions result in larger file sizes that may impede document submittal. Larger files use more storage space, and take up more memory. In general, "PDF image" documents are much larger than documents converted from word processing software directly to PDF. The CM/ECF system is technically capable of accepting large documents, but they may take longer to upload and download. Please see the size limit at <https://ecf.cod.uscourts.gov/cgi-bin/CourtInfo.pl>

- ECF users must have a PACER account in order to use the Query and Report features of the ECF system, and to view electronically stored document images. You do not need multiple PACER accounts for a given firm. The same PACER login can be concurrently logged in multiple times. If you do not have a PACER login, contact the PACER Service Center at (800) 676-6856 for information. Or, you may register for PACER online at <http://pacer.psc.uscourts.gov>.
- An attorney must be admitted to practice in the District of Colorado and be in good standing.
- In addition to having a PACER account, a user must register with the court as an ECF user in order to electronically submit a document. Once properly registered as a court user, the clerk's office will issue a login and password to the attorney. This login and password, along with the "s/ signature" will serve as the user's signature for purposes of Fed. R. Civ. P. 11 for all documents electronically submitted to the court.

### Registering for Access to ECF

A user who needs to register for access to the Electronic Case Files (ECF) system should visit the court's website at <http://www.cod.uscourts.gov> to complete an online registration form. After processing the properly completed registration form, the clerk's office will establish a user account for the applicant. The applicant will then be contacted and provided a user's ECF login information by e-mail.

Registered users can visit a training version of the ECF system on the Internet at <https://ecf-train.cod.uscourts.gov> to practice ECF activities. The court strongly recommends that registered users practice in the "training" ECF database before filing documents in the "live" ECF database.

**Note: a training DB login is required for access to the Training DB. The live DB login WILLNOT allow access to the Training DB. If you want a Training DB login, please contact the ECF Help Desk.**

## **Chapter 2** **Preparation**

### **Adobe Acrobat Reader**

Users must set up Adobe's Acrobat Reader software in order to view documents that have been electronically filed on the system. All pleadings must be filed in PDF format. The software may be downloaded at <http://www.adobe.com>. When installing this product, please review and follow Adobe's directions to utilize Acrobat Reader after installation.

### **Portable Document Format (PDF)**

#### **Viewing a PDF Document**

- Open Adobe Acrobat or Acrobat Reader.
- Select "**File**" on the menu bar and choose "**Open**" from the drop-down window.
- Click on the location and file name of the PDF document you wish to view.
- Acrobat loads the file and displays it on your screen. Verify it is the document you wish to send. Verify the file size of the document.
- If the displayed document is larger than the screen or contains more than one page, use the scroll bars and buttons to move about within the document.
- Click on the "**View**" menu to select other options for viewing the document. Choose the option that best suits your viewing needs.

### **Converting Electronic Documents to PDF Format**

You must convert all of your documents from their native application to PDF format before submitting them to the court through its Electronic Case Files (ECF) system. Only documents in Portable Document Format (PDF) may be filed with the Court using the ECF system. Before sending the file to the court, a user should preview the PDF document to ensure it is the correct document, all pages included, is legible, and the document is properly formatted after being converted to PDF.

### **Software Available for Converting to Portable Document Format (PDF)**

Adobe Acrobat is a software product that may be used to convert your documents to PDF. WordPerfect Version 9 and higher word-processing application has built in PDF conversion capability and may also be used. Other software products are also available to convert your documents to PDF. Users should explore the software options available.

**Note: Although newer versions of WordPerfect can create PDF documents within the word processing application, they generally create larger file size (number of bytes).**

### **Converting Documents from Word Perfect Version 9 or higher**

- Open a WordPerfect document (with file extension *.wpd*).
- From the menu bar, click on "**File**" and from the drop-down menu select "**Publish to PDF.**"
- Save the file as a PDF file, giving it a *.pdf* extension.

- Your document is now saved as a PDF file. The original file remains in WordPerfect format under its original file name and *.wpd* extension.

**For All other versions (older than 9) of Word Perfect, versions of Microsoft Word and Excel (other than 2007), and any other PC/MAC based application that allows you to print:**

- Install Adobe Acrobat (or other PDF conversion software) on your computer.
- Open the document you wish to convert.
- Select **“Print”** from the menu bar. Within the **“Current Printer”** field of the **“Printer”** window, select the option to change the selected printer. A drop down menu opens and a list of printer choices is displayed.
- Select **“Adobe PDFWriter” (or the “printer” that allows you to create a PDF file)**
- Click **“OK”** to “print” the file. Instead of the file printing to your printer, a window will appear.
- Name the document, verify the “saved file type” is *.pdf*, and click the **“Save”** button.
- Your document is now saved as a PDF file. The original file remains in its original format under its original file name and extension.

**Note: There are several ways to create a PDF document, the above list is just one of the methods. Please refer to your software instructions to ensure you are properly selecting and creating your PDF document.**



## **Chapter 3** **Basics**

### **User Interactions**

Users normally interact with the Electronic Case Files (ECF) system in three ways.

- Entering information in data fields also referred to as Text Boxes
- Mouse-clicking on hyperlinks and/or radio buttons
- Selecting command buttons to direct system activities

### **Conventions Used in This Manual**

- Data to be entered by the user is shown enclosed in angle brackets: <Data to be entered>.
- Command buttons are represented in this manual in bracketed boldfaced type: **[Command Button]**.
- Hyperlinks are displayed in underlined boldfaced type: **hyperlink**.

### **Common Mistakes When Filing a Document**

Some common mistakes made when filing a document include:

- Selecting the wrong PDF file to attach to a docket entry;
- Selecting the wrong document type (the original document rather than the converted file with the *.pdf* extension);
- Selecting the wrong docketing event from the ECF menus; and,
- Entering the wrong case number and not discovering the error before completing the transaction.

The ECF system does not permit you to substitute or remove a misfiled document after it has been submitted electronically to the court. Only the presiding judge may order the correction of a document once it has been filed. So, please be careful to avoid these common mistakes.

The clerk's office can help you correct docketing errors, and can provide you with guidance on what to do if the wrong document has been filed, or the right document has been filed, but in the wrong case. If a mistake has been made, telephone the Help Desk to inform the clerk's office of the problem and to obtain guidance for fixing the problem.

You will need to provide the case number and document number(s) for the docket entry or entries requiring correction. If appropriate, the clerk's office will make an entry indicating that the document was filed in error. You will be advised if you need to re-file the document. Please review the Electronic Case Filing Procedures for more information on filing errors.

### **Viewing Transaction Log**

This feature, selected from the **Utilities** menu, allows you to review all transactions ECF has processed with your login. If you need to check what you have done in ECF, review your transaction log. If you believe or suspect that someone is using your login and password without your permission, you can use the transaction log to confirm this as well.

If someone is using your login and password without your permission, immediately telephone the clerk's office Help Desk. The clerk's office will assist you in changing your password. If you believe that a document has been improperly filed with the court under your signature (your login and password is your electronic signature) you will need to inform the clerk's office Help Desk.

Please review the Electronic Case Filing Procedures for more information on login and password problems.

## **User Manual**

You can view or download the most recent version of this ECF User Manual (in PDF format) from the court's web page. Enter <http://www.cod.uscourts.gov> in your browser's address/location field, and when the Court's web page opens, click on the **Electronic Case Filing** link.

**Note: The ECF User Manual is best viewed using Version 5 (or higher) of Adobe Acrobat Reader. The electronic version of the guide contains bookmarks to help you navigate quickly from one section to another. This bookmarking feature can be viewed only with Acrobat Reader 5.0 (or higher)**

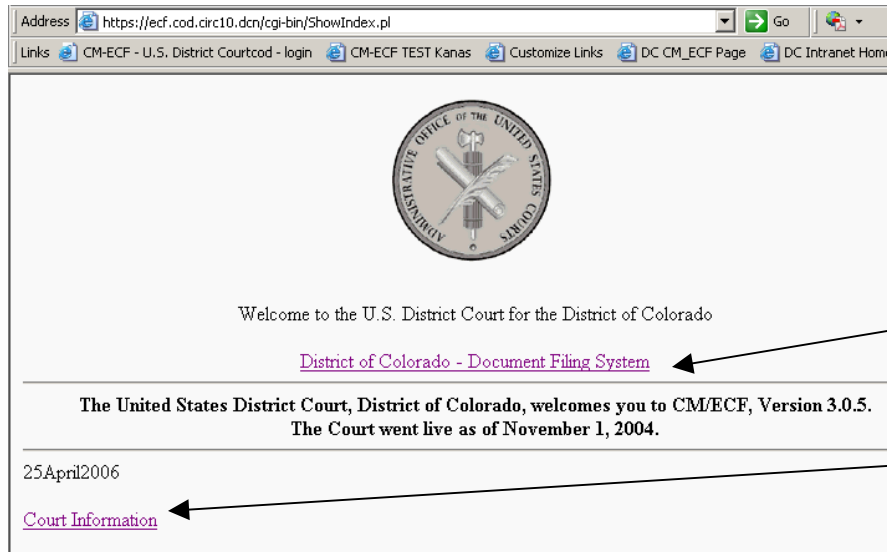
# Chapter 4 ECF System

## Entering the ECF System

This section of the User Manual provides information for entering the Electronic Case Files (ECF) System.

You may enter the system by going to the court's web page at <http://www.cod.uscourts.gov>, clicking on the [Electronic Case Files](#) link on the opening page, and then clicking on the [Electronic Case Filing – Live](#) link.

**Frame 4-0**

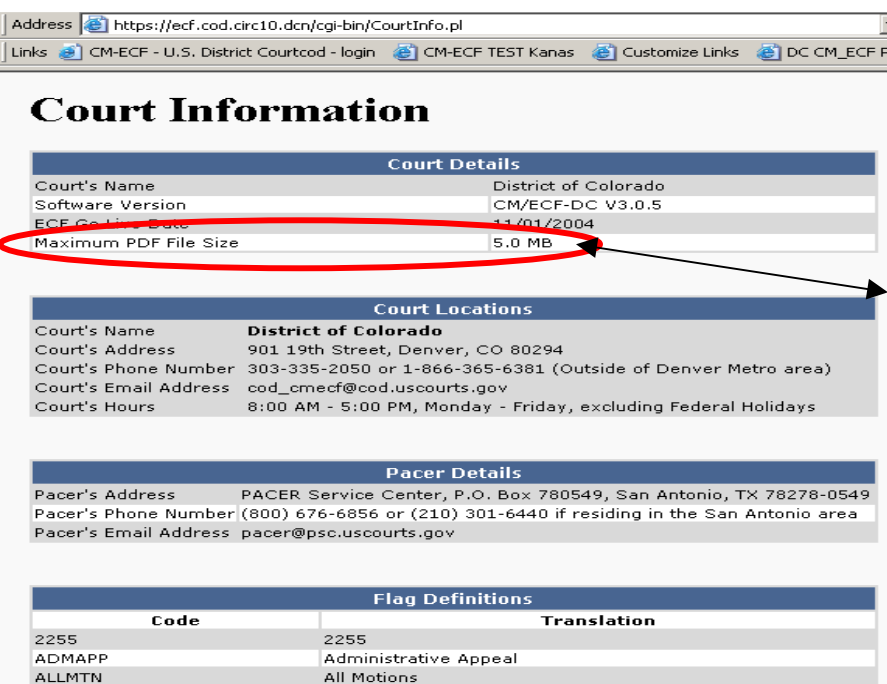


### ECF Home Page

Alternatively, registered users may enter the ECF system directly by typing the following URL into the location field of an ECF-compatible web browser:

- <https://ecf.cod.uscourts.gov>
- Clicking on the [District of Colorado – Document Filing System](#) link will take you to the ECF/PACER Login screen.
- Clicking on the [Court Information](#) link will take you to a page with information about the court, maximum PDF file size, etc.

**Frame 4-1**



### Court Information Page

When you click on the [Court Information](#) link, the court information page is displayed.

Information as to the court's address, hours, etc. is available.

Also, this page displays the **maximum** file size for PDF files being submitted to ECF.

**Note:** The maximum file size is per PDF document. Your total filing may exceed the per document maximum. For example, your main document is 2MB, Exhibit A is 4.9 MB, and Exhibit B is 3 MB. All three documents equal 9.9 MB.

## Logging in to the ECF System

### Frame 4-2

#### CM/ECF Filer or PACER Login

##### Notice

This is a **Restricted Web Site** for Official Court Business only. Unauthorized entry is prohibited and subject to prosecution under Title 18 of the U.S. Code. All activities and access attempts are logged.

##### Instructions for filing:

Enter your CM/ECF filer login and password if you are electronically filing something with the court.

##### If you received this login page as a result of a link from a Notice of Electronic Filing email:

Enter your CM/ECF filer login and password. The system prompts customers for a CM/ECF login and password when attempting to view certain types of documents.

##### If you have trouble viewing a document:

After successful entry of your CM/ECF login, you should be able to view the document. If you receive the message "You do not have permission to view this document," viewing the document is restricted to attorneys of record in the case and the system does not recognize you as such. If the login prompt appears again, after you have entered your CM/ECF login and password, it means that the "free look" link has expired. You will need to enter your PACER login and password to view the document, and you will be charged \$.08 per page.

##### Instructions for viewing filed documents and case information:

If you do not need filing capabilities, enter your PACER login and password. If you do not have a PACER login, you may register online at <http://pacer.psc.uscourts.gov>.

##### Authentication

Authentication form with fields for Login, Password, and client code. Below the fields are buttons for Login and Reset.

**NOTICE:** An access fee of \$.08 per page, as approved by the Judicial Conference of the United States, will be assessed for access to this service. For more information about CM/ECF, [click here](#) or contact the PACER Service Center at (800) 676-6856.

### ECF/PACER Login Page

- The ECF/PACER Login page is used for logging in with your PACER login **or** your ECF login.
- To be able to file pleadings, you may enter your ECF login and password. On this system, you will file your electronic documents with the clerk's office.
- To review the docket, view a document, run a Query, or view reports, you may enter your PACER login and password and enter the PACER system.
- **NOTE: YOU WILL BE BILLED PACER charges when running queries and most of the reports.**

### Frame 4-3

#### CM/ECF Filer or PACER Login

##### Notice

This is a **Restricted Web Site** for Official Court Business only. Unauthorized entry is prohibited and subject to prosecution under Title 18 of the U.S. Code. All activities and access attempts are logged.

##### Instructions for filing:

Enter your CM/ECF filer login and password if you are electronically filing something with the court.

##### If you received this login page as a result of a link from a Notice of Electronic Filing email:

Enter your CM/ECF filer login and password. The system prompts customers for a CM/ECF login and password when attempting to view certain types of documents.

##### If you have trouble viewing a document:

After successful entry of your CM/ECF login, you should be able to view the document. If you receive the message "You do not have permission to view this document," viewing the document is restricted to attorneys of record in the case and the system does not recognize you as such. If the login prompt appears again, after you have entered your CM/ECF login and password, it means that the "free look" link has expired. You will need to enter your PACER login and password to view the document, and you will be charged \$.08 per page.

##### Instructions for viewing filed documents and case information:

If you do not need filing capabilities, enter your PACER login and password. If you do not have a PACER login, you may register online at <http://pacer.psc.uscourts.gov>.

Authentication form with fields for Login, Password, and client code. Below the fields are buttons for Login and Reset. A red box highlights the client code field, and a blue box highlights the Login and Reset buttons. An arrow points from the text below to the Login button.

**NOTICE:** An access fee of \$.08 per page, as approved by the Judicial Conference of the United States, will be assessed for access to this service. For more information about CM/ECF, [click here](#) or contact the PACER Service Center at (800) 676-6856.

You **DO NOT** need a client code for an ECF Login.

### Logging in to ECF/PACER

- Enter your ECF login name and user password in the appropriate data entry fields. It is important to remember that all ECF login names and passwords are **case sensitive**.
- 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 the following error message on a new screen. **"Login failed either your login name or key is incorrect."**
- Click on the web browser **[Back]** button and re-enter your correct login and password.

### Frame 4-4 Menu Features

**ECF** Civil Criminal Query Reports Utilities Search Logout

U. S. District Court [TEST]  
District of Colorado [TEST]  
Official Court Electronic Document Filing System

This message is contained in the file OperationNotice.htm.  
You may use this file to alert users to current CM/ECF operational issues.

*This facility is for Official Court Business only. Activity to and from this site is logged. Document filings on this system are subject to Federal Rule of Civil Procedure 11. Evidence of unauthorized or criminal activity will be forwarded to the appropriate law enforcement officials.*

Welcome to the U. S. District Court [TEST] for the District of Colorado [TEST] Electronic Document Filing System. This page is for use by attorneys and firms participating in the electronic filing system. The most recent version of the Netscape browser and the Adobe PDF reader can be obtained by selecting the [Netscape/PDF Settings](#) option listed below.

[Netscape/PDF Settings](#)

Last login: 05-29-2007 12:47  
22March2007

**NOTICE:** An access fee of \$.08 per page, as approved by the Judicial Conference of the United States, will be assessed for access to this service. For more information about CM/ECF, [click here](#) or contact the PACER Service Center at (800) 676-6856.

*CM/ECF has been tested and works correctly with Netscape 7.x, Internet Explorer 6.0 and Firefox 1.5.*

### ECF Menu Features and other information

- The **Blue** Menu bar is displayed at the top.
- Select **Civil** to electronically file all civil documents.
- Select **Criminal** to electronically file all criminal documents.
- Select **Query** for specific case information. You will be prompted to enter your PACER login and PACER password before you can continue your query.
- Select **Reports** to retrieve calendar events, cases-filed reports, and docket sheets. You will be prompted to enter your PACER login and PACER password before you can continue to run your report.
- Select **Utilities** to View your personal ECF transaction log and maintain personal ECF account information in the **Utilities** function of ECF.
- Select **Logout** to log out of the ECF application.

**Note:** The date and time you last logged into the system appears at the bottom left corner of your screen. You should review this information each time you log in. If you believe the date and time of your last log in are not correct, or you suspect an unauthorized party is using your login and password, telephone the court's Help Desk with this information as soon as possible.

### Basic Manipulations

When using the ECF system, there are three basic processes that allow you to move from screen to screen.

- First, text boxes where you enter data such as case numbers or text information.
- Second, use the **[Next]** button or the **[Submit]** button to accept entered data and display the next data entry screen. To retrieve the previous screen to correct data entry errors, use the **[Back]** button on the web browser toolbar.
- Third, there are **[Browse]** buttons to allow you to browse your folders/ locations to select PDF documents and attachments.

**NOTE:** Users should avoid using the **[Back]** button in complicated transaction, as it is easier to just start over. Some of the CM/ECF screens are not cached so when the back button is used, the page of previous information cannot be re-displayed, thus causing an error. When using the **[Back]** button, a user may not use the **[Forward]** button on the web browser when the correction has been made. Progression must be made using the ECF navigation buttons such as "Next" or "Submit."

### **Steps Related to Filing Documents in Civil and Criminal Cases**

There are eight basic steps for filing a document in a **civil or criminal** case in ECF:

1. Select the **Type of Document** to File (i.e. motion, notice, Answer, etc.)
2. Identify the **Case number** for Which the Document is Being Filed
3. Designate the **Party** for Whom the Document is Being Filed
4. Specify the **PDF** Document to File
5. **Additional ECF** Information (i.e. various check boxes or text box entry based upon the type of document being filed)
6. **Modify** the Docket Text as Necessary
7. **Submit** the Document to ECF
8. **Receive** the Notice of Electronic Filing

The eight basic steps listed above are common to all civil and criminal documents to be filed.

## **Chapter 5**

### **Civil Case Docketing**

Registered filers will use the **Civil** feature of ECF to electronically self-file and docket with the court a variety of documents in civil cases. A comprehensive list of the ECF civil events available to registered users can be accessed through the **Reports** link on the CM/ECF Menu Bar. There is no charge to access this report and it is the most accurate and up to date version of the ECF civil events. You may also use the Windows find feature to easily search for the proper event. Alternatively, user can use the Search feature of CM/ECF to also find events.

For purposes of this User Manual, **Miscellaneous** and **Judgment** cases should also follow the practices listed in the **Civil** section.

#### **Filing a Civil Case Initiating Document (New complaint or Notice of removal)**

Civil case initiating documents shall be filed in accordance with the procedures in the **New Cases** section of the **Electronic Case Filing Procedures**.

Civil case initiating documents shall be submitted ECF registrants to the court in PDF format via e-mail.

#### **Submitting Initiating Document(s) by E-Mail**

- Create PDF versions of the Civil Complaint, Civil Cover Sheet (JS-44), and Summons forms (if appropriate).
- Create an e-mail addressed to the clerk's office e-mail address for new cases: [newcases@cod.uscourts.gov](mailto:newcases@cod.uscourts.gov).
- In the **subject line** of the e-mail indicate this is a new case by typing "**new case**" and the short case title (e.g. "New Case – Jones v. Smith).
- In the e-mail indicate how the party will be **paying the filing fee**.
- If the initiating party is requesting the issuance of a summons, the e-mail must **state how the party would like the summons returned**.
- Attach **PDF versions of the case initiating documents** in the e-mail
- **Send the e-mail** to the clerk's office.

After review and processing, the clerk's office will open the case in ECF and inform the initiating party by the Notice of Electronic Filing (NEF) when the case has been filed.

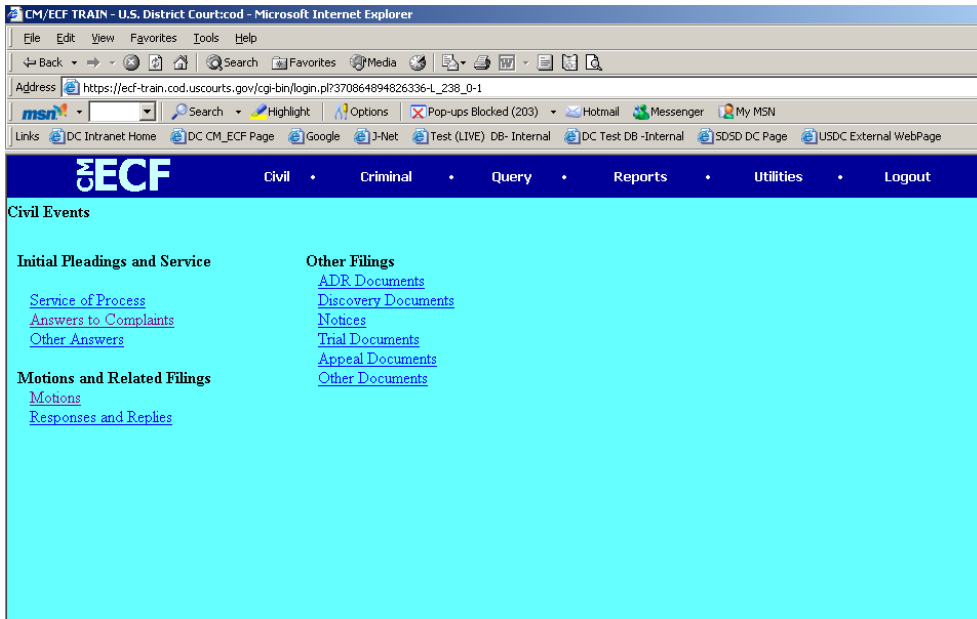
The preferred method to submit case initiating documents is via e-mail. Case initiating documents may also be submitted on CD/DVD or other electronic medium per the ECF Procedures. Please refer to the ECF Procedures for more information on submitting in other mediums.

#### **Filing an Answer**

**Note: Beginning with Version 3.1 of CM/ECF, the Blue Menu Bar provides options to continue to use the static menu selections or the cascading menu options to navigate from one function to another more easily. These examples continue to show the static approach. See Appendix 3 to learn more about cascading menus.**

As an illustration, this section of the User Manual describes the basic steps you will need to take to file an answer with the court. The process for filing other types of documents using other civil events is similar.

**Frame 5-1 Selecting the type of document to file**



Selecting the **type of document** to file.

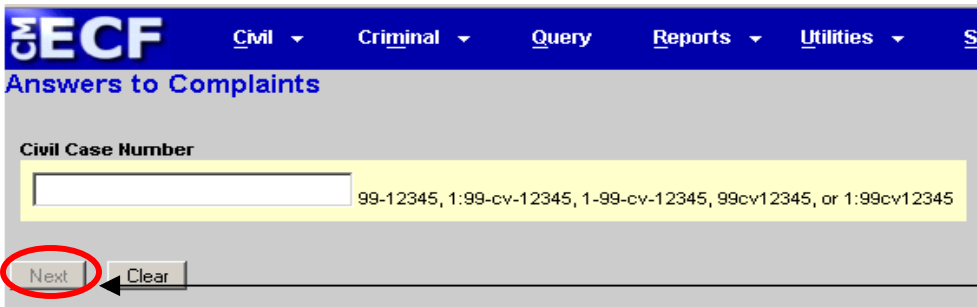
**Filing an Answer to Complaint**

- After successfully logging into ECF, click on **Civil** from the *blue* menu bar at the top of the ECF screen.
- **Civil Events** window opens displaying the major categories of events used to file documents with the clerk's office.
- Select the Type of Document to File.
- To file an answer, the user should click on Answers to Complaints under **Initial Pleadings and Service**.

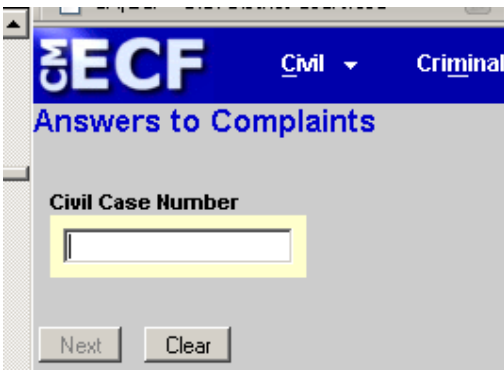
**Frame 5-2 Identifying the case**

**Note: ECF defaults to the last case from which you worked. Ensure the proper case number is entered in this field to avoid filing your document in the wrong case.**

**Frame 5-2a Identifying the case**





OR (Alternate Case Number entry screen display)

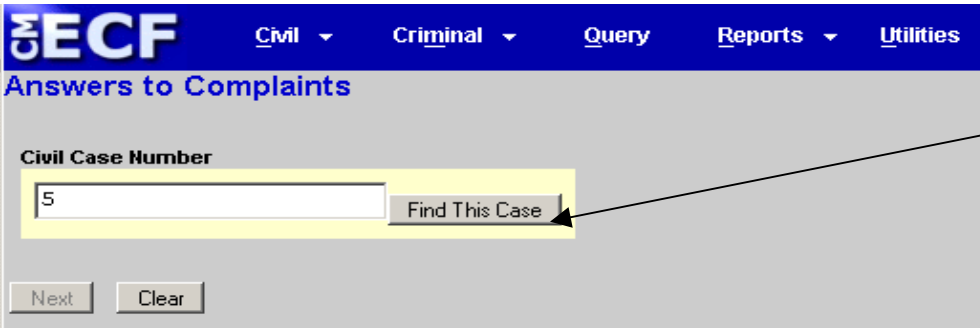
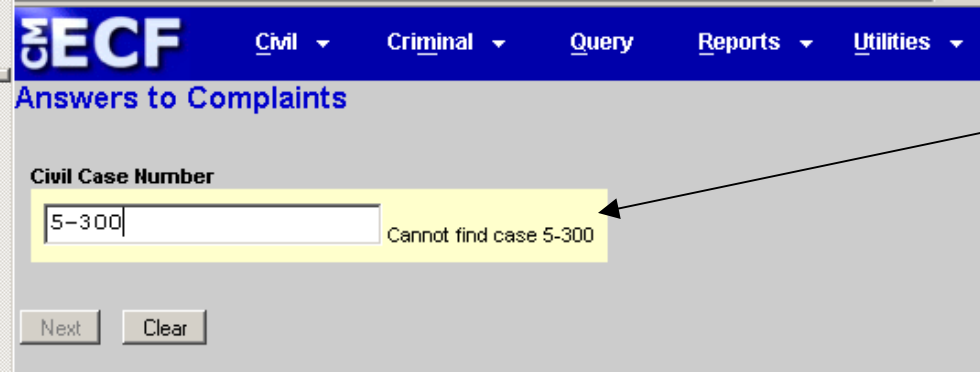
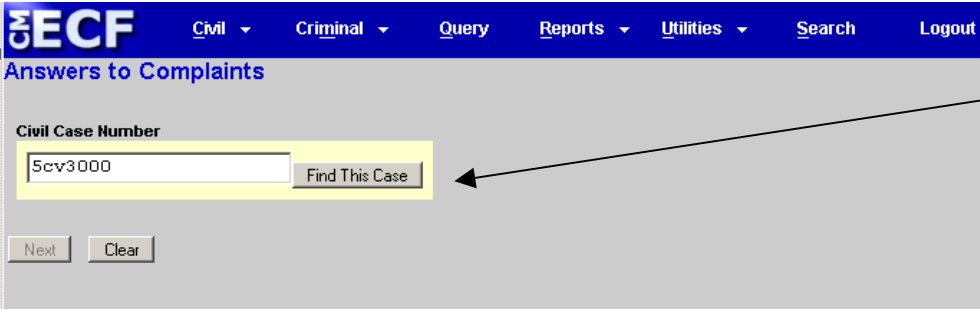



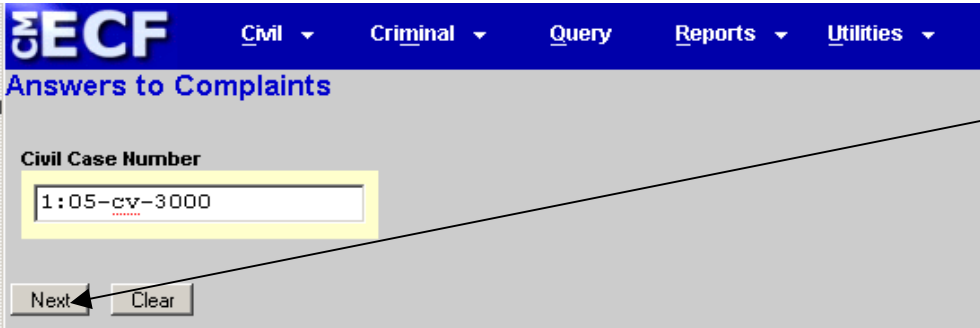



**Identify the case**

- Identify the Case for Which the Document is Being Filed.
- Enter the number of the case for which the document is being filed.

**Note:**   The Next button is grayed out which indicates the button is not functional until a valid case is entered.



<p><b>Frame 5-2b</b></p>  <p>The screenshot shows the ECF interface with a blue header containing the ECF logo and navigation tabs: Civil, Criminal, Query, Reports, and Utilities. Below the header is the title "Answers to Complaints". A form labeled "Civil Case Number" contains the text "5" in a text box. To the right of the text box is a button labeled "Find This Case". Below the form are two buttons: "Next" and "Clear".</p>	<ul style="list-style-type: none"><li>• Once you begin to enter a case number, the <b>Find This Case</b> button is displayed. After entering the entire case click on the <b>Find This Case</b> button.</li></ul>
<p><b>Frame 5-2c</b></p>  <p>The screenshot shows the ECF interface with the same header and title as Frame 5-2b. The "Civil Case Number" form now contains "5-300" in the text box. To the right of the text box, the message "Cannot find case 5-300" is displayed. The "Find This Case" button is no longer visible. The "Next" and "Clear" buttons are still present.</p>	<ul style="list-style-type: none"><li>• If the case number is not valid, a message is displayed next to the entry box. The <b>Next</b> button continues to be grayed out.</li></ul>
<p><b>Frame 5-2d</b></p>  <p>The screenshot shows the ECF interface with a blue header that includes additional tabs: Search and Logout. The "Civil Case Number" form contains "5cv3000" in the text box. The "Find This Case" button is highlighted. The "Next" and "Clear" buttons are still present.</p>	<ul style="list-style-type: none"><li>• Correct the case number entry and click on the <b>Find This Case</b> button.</li></ul>
<p><b>Frame 5-2e</b></p>  <p>The screenshot shows the ECF interface with the same header and title. The "Civil Case Number" form contains "1:05-cv-3000" in the text box. To the right of the text box, the message "Looking up case number 1:05-cv-3000..." is displayed. The "Next" and "Clear" buttons are still present.</p>	<ul style="list-style-type: none"><li>• An informational message is displayed as CM/ECF is accessing the case number.</li></ul>

<p><b>Frame 5-2f</b></p> 	<ul style="list-style-type: none"><li>• The case number is valid and the <b>Next</b> button is darkened, so you can click on it to continue.</li></ul>
<p><b>Frame 5-2g</b></p> 	<ul style="list-style-type: none"><li>• Beginning with Version 3.1 of CM/ECF, only civil type cases (i.e. cv, mc, bj, etc.) will be searched when users are in the <b>Civil</b> option. If there is a criminal case with the same number, it will not be shown or listed in the pick list.</li></ul>
<p><b>Frame 5-2h</b></p> 	<ul style="list-style-type: none"><li>• However, If there are case numbers that are the same, they will be listed in a pick list and the user must click the appropriate check box before the <b>Next</b> button is darkened and can be clicked.</li></ul>
<p><b>Frame 5-3</b></p> 	<ul style="list-style-type: none"><li>• After clicking on the <b>Next</b> button, a review screen is displayed.</li><li>• Click on the <b>Next</b> button to continue</li></ul>

**Frame 5-4 Designating the filing party**

**Designating the filing party.**

- After identifying the Case Number, ECF provides you with a list of parties involved in the case.
- Highlight the name of the party for whom you are filing the document.
- If you represent more than one party, select multiple parties by holding down the **[CTRL]** key while pointing and clicking on each party you represent. If done correctly, each party selected will remain highlighted.
- After highlighting the parties to the document, click on the **[Next]** button.

**Frame 5-5**

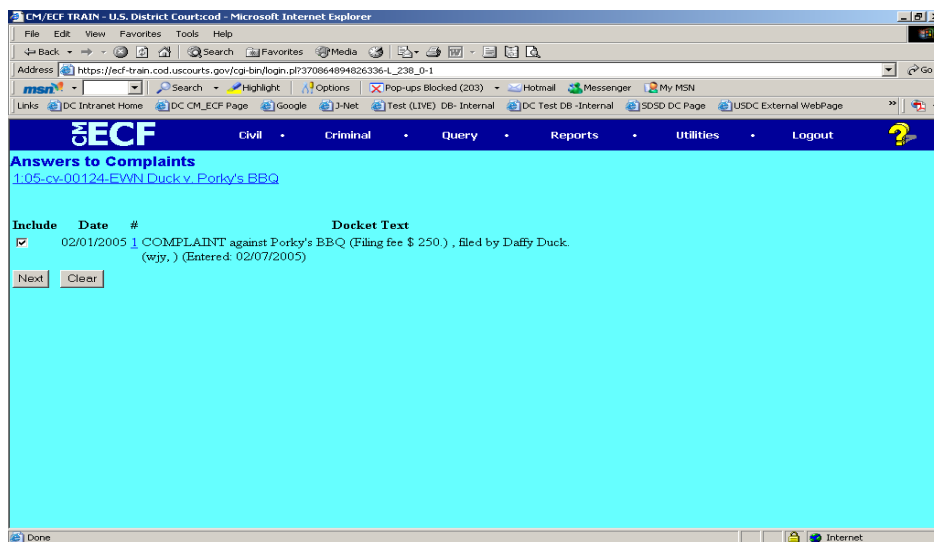
**Note:** If the list depicted does not display the party or parties a user represents, contact the Help Desk at 1-866-365-6381 or 303-335-2050 Monday thru Friday, from 8:00 a.m. to 5:00 p.m. (Mountain Time) with your party's information. Only court personnel can add or create new parties to a case. If you click on the Add/Create New Party hyperlink, ECF returns an error message advising you of this restriction.

**Frame 5-6 Attorney/Party association screen**

**Attorney/Party Association Screen**

- If this is the **first time** the attorney is filing in the case, the Attorney/Party Association window will appear. The purpose of the window is to create an association ("link") between the attorney and the party.
- A list of parties is displayed with a message indicating a party/attorney relationship has not been established. If the attorney does represent the filing party, the checkbox **MUST** be checked (linked) to establish the association.
- If the attorney **DOES NOT** represent the parti(es) listed, the attorney should **NOT** check the box(es) to create an association.
- Click the **[Next]** button.

### Frame 5-7 Linking

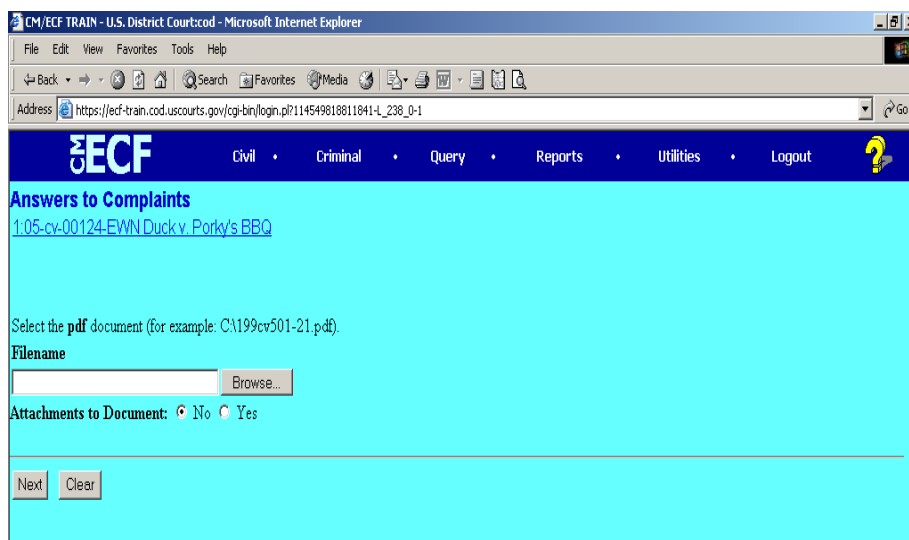


Linking the Answer to the Complaint

- Check the **Include** box next to the document for which the answer is being filed.
- Click on the **[Next]** button.
- If a box is **not checked**, an error dialogue box will appear with the following message: **“You did not select a docket entry to answer.”**

• Since this is an Answer to a Complaint, the event must link the answer you are filing to the Complaint being answered.

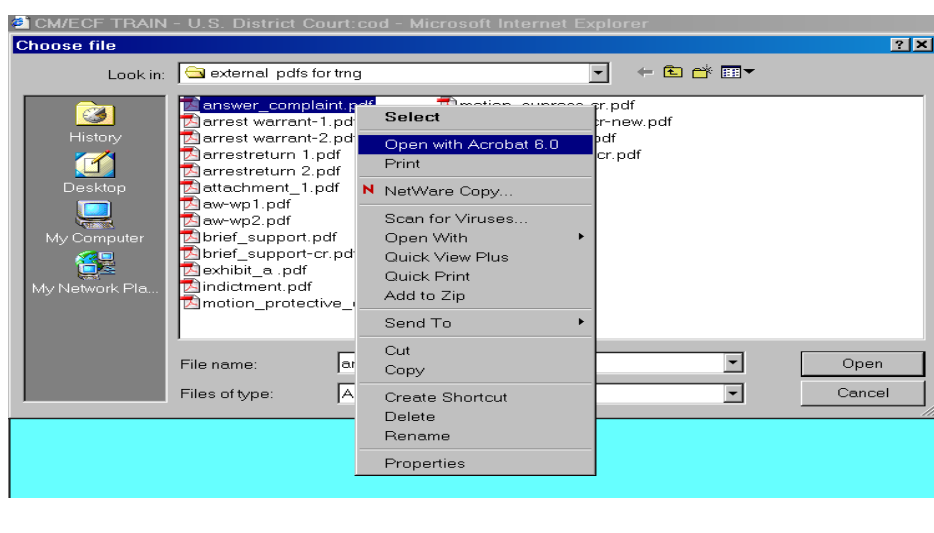
### Frame 5-8 Specifying the PDF document



Specify the PDF document to file.

- ECF provides the filer an entry box to indicate the **main document** as well as indicating, via the **attachment radio button**, if there are any attachments to the main document being filed.
- Click the **[Browse]** button.

### Frame 5-9 Viewing the PDF document



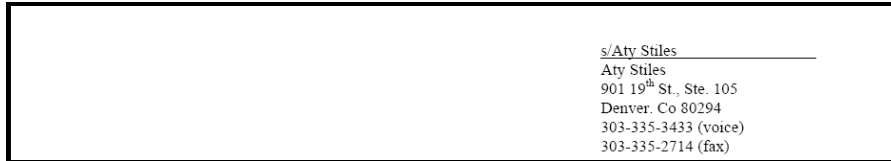
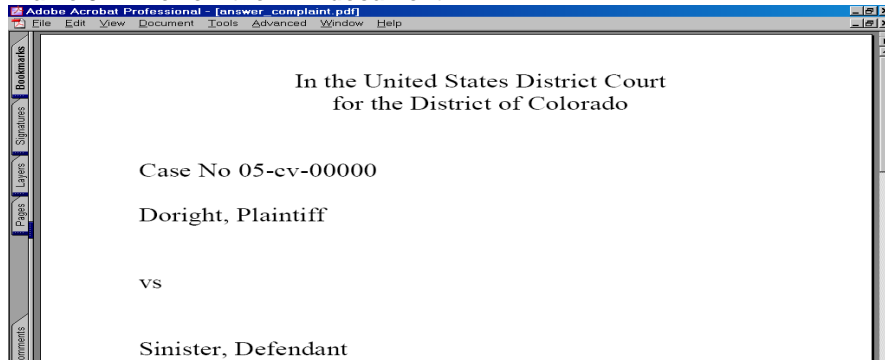
Viewing the PDF document.

- The **Choose File** dialog box will appear and you can navigate to the folder (or location) where you have the PDF document.
- The court highly recommends you right click and open the document up in Adobe Reader (or Adobe Acrobat) to view the PDF document to ensure it is the correct PDF document you wish to file.

**Frame 5-10**

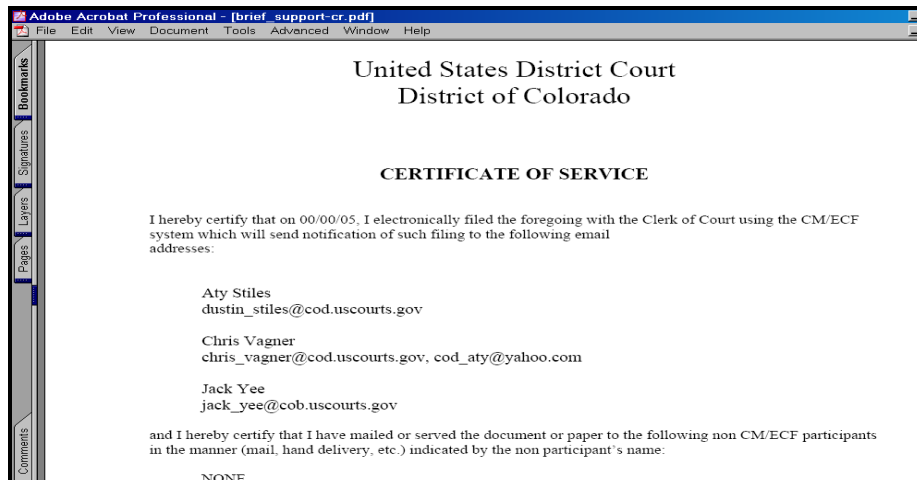
**Note: It is highly recommended you view the PDF document and any attachments to ensure you are filing the correct documents in the ECF application.**

**Frame 5-11 Review the PDF document**



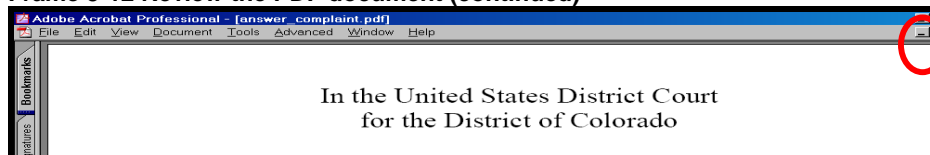
**Review the PDF document**

- Each PDF attached is limited to the 2 MB court standard on document size, but a transaction with attachments may exceed the standard.
- When viewing the PDF document, check the document for items such as:
  - court
  - case number and style
  - parties
  - correct document
- The signature (i.e. s/ and the attorney name



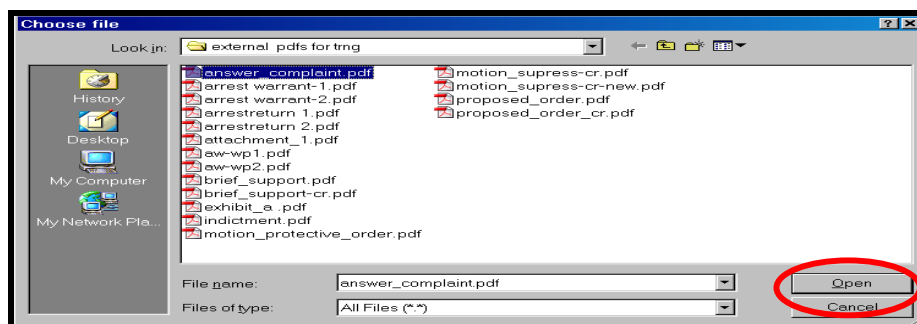
- Is the "Certificate of Service" part of the main document?
- The "Certificate of Service" does not need to be a separate attachment. It's considered to be part of the main document.
- The s/ on the "Certificate of Service" can be the attorney or the secretary, paralegal, or administrator.

**Frame 5-12 Review the PDF document (continued)**

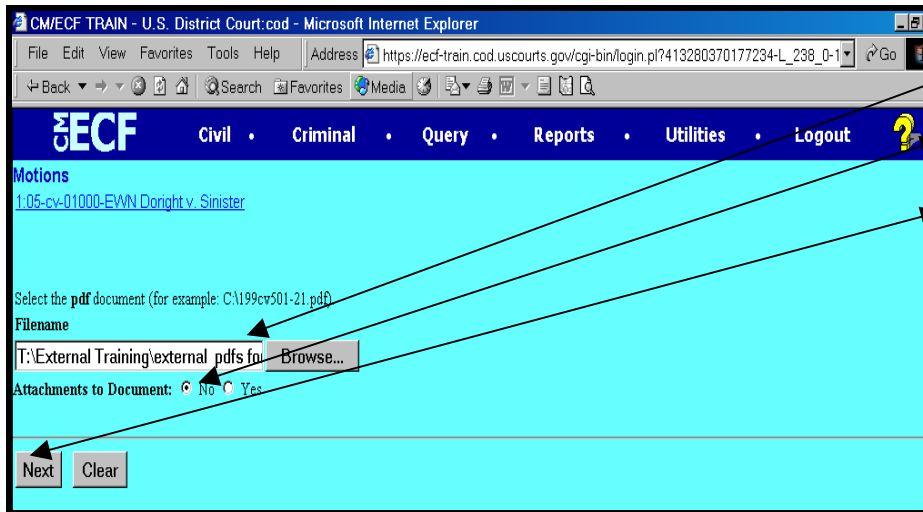


**Review the PDF document (continued)**

- After viewing the PDF document, close the Adobe application.
- Click on the **[OPEN]** button to populate the entry box for the filename.



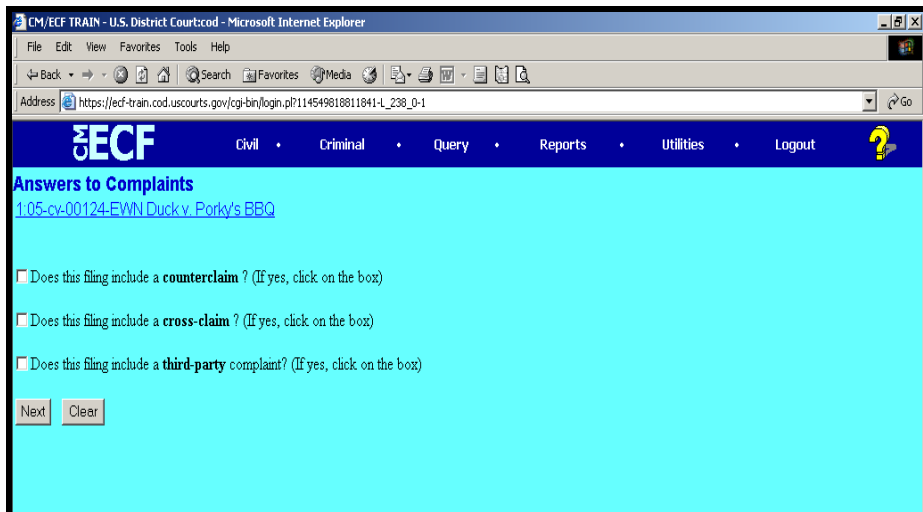
**Frame 5-13 attaching the PDF document**



**Attaching the PDF document**

- The Filename box is now filled with the name of the main document.
- If there are attachments to the main document, click on the [No] radio button.
- Click the [NEXT] button.

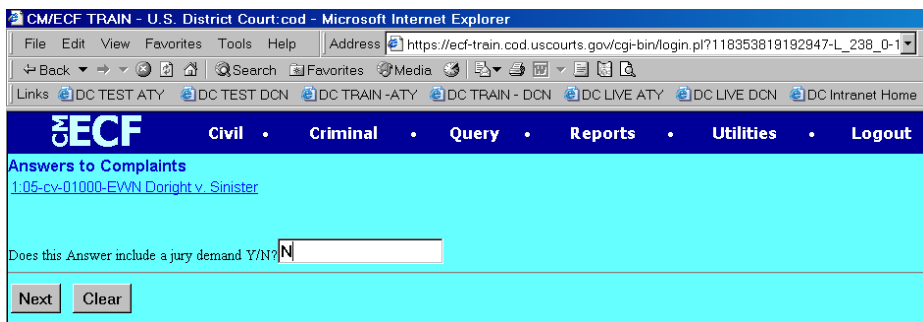
**Frame 5-14 additional ECF information**



**Additional ECF information**

- In the filing of an Answer to Complaint, ECF will display check boxes to further determine processing requirements.
- In this example, an "Other Filing Question" screen asks the filer if this filing includes a counter claim, cross-claim, or a third party complaint.
- The filer should check any that apply.
- If none apply, click on [Next] button without checking any of the check boxes.

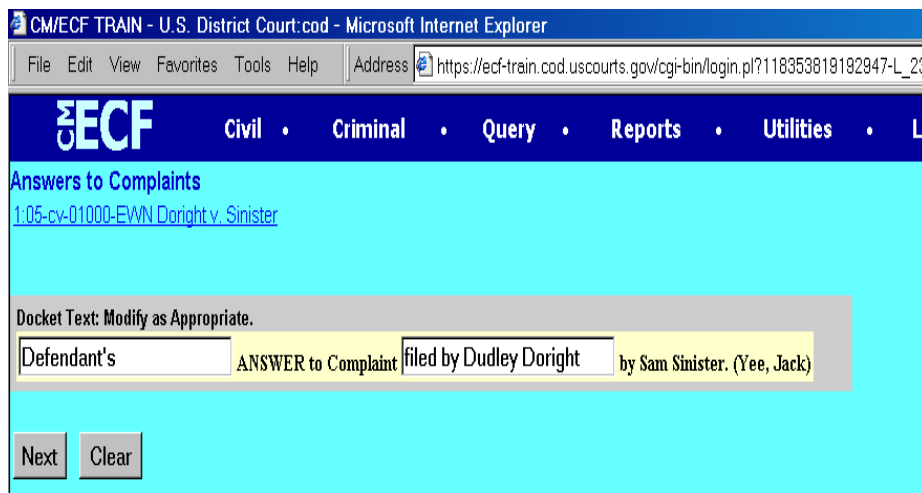
**Frame 5-15 More ECF information**



**More ECF Information**

- Another ECF screen is displayed to ask if this Answer includes a jury demand.
- A "Y" or "N" entry is requested.
- In our example, we'll enter a "N"
- Click on [Next]

**Frame 5-16 Modify docket text, as necessary**



Modify docket text, as necessary

- The docket text modification screen will be displayed. This provides an opportunity for the filer to add text to further define the entry.
- Wherever there is white space, the filer may enter text. It's optional. For example, in the first text box, you may enter "Defendant's" in the text box so the docket text will read "Defendant's ANSWER to Complaint..." If nothing is entered, the docket text will read, "ANSWER to Complaint..."
- After entering all applicable docket text, click on the **[NEXT]** button.

**Frame 5-17 Completing the Transaction**



Completing the Transaction

- **THIS IS THE "LAST" SCREEN FOR YOU TO REVIEW!!**
- If you click the **NEXT** button, the transaction is posted to the database.
- An informational message as to the path and filename of the PDF document is displayed for review. This provides the user a "final" opportunity to check the filename as to it being the correct document. **If it's not the correct document, you should abort this transaction and start it over again.**
- Click on the **[Next]** button to commit the transaction.

**Frame 5-18**

**Note:** ECF displays a "Final warning" indicating if the [Next] button is clicked, the transaction is completed and it is entered into the ECF database and the Notice of Electronic Filing (NEF) is created and displayed. The NEF is queued up to be sent as an e-mail to parties.

**Note:** At any time prior to this step, you can abort the ECF filing by simply clicking on a menu item on the blue menu bar, including logging out of the system. Users should avoid using the [Back] button as page information is NOT cached and the user will encounter problems. It 's easier to just start over

**Frame 5-19 Notice of Electronic Filing (NEF)**

**Notice of Electronic Filing**

The following transaction was entered by Yee, Attorney on 5/31/2007 at 10:14 AM MDT and filed on 5/31/2007

**Case Name:** Good Guys, Inc. v. Bad Guys  
**Case Number:** [1:05-cv-3000](#)  
**Filer:** Bad Guys  
**Document Number:** [10](#)

**Docket Text:**  
**ANSWER to Complaint by Bad Guys.(Yee, Attorney)**

**1:05-cv-3000 Notice has been electronically mailed to:**

Another Goody [cod\\_ewn@yahoo.com](mailto:cod_ewn@yahoo.com)  
 Justa Goody [cod\\_aty@yahoo.com](mailto:cod_aty@yahoo.com)  
 Dean Martin [Leslie\\_A\\_Martin@cod.uscourts.gov](mailto:Leslie_A_Martin@cod.uscourts.gov)  
 Leslie Martin [leslie\\_a\\_martin@cod.uscourts.gov](mailto:leslie_a_martin@cod.uscourts.gov), [gail\\_shaw@cod.uscourts.gov](mailto:gail_shaw@cod.uscourts.gov)  
 Attorney Yee [jack\\_yee@cod.uscourts.gov](mailto:jack_yee@cod.uscourts.gov), [jack\\_yee@cob.uscourts.gov](mailto:jack_yee@cob.uscourts.gov)

**1:05-cv-3000 Notice has been mailed by the filer to:**

Chris Vagner  
 Vagner and Yee  
 1234 N. 20th Street  
 Denver, CO 80294

The following document(s) are associated with this transaction:

**Document description:**Main Document  
**Original filename:**n/a  
**Electronic document Stamp:**  
 [STAMP dcecfStamp\_ID=1071006659 [Date=5/31/2007] [FileNumber=71419-0]  
 [8aa0609f7692f6813a312f71d8775b0d61e201cf92b0dcb39a40bacec57c592ca7aee  
 1f05edb157e24327ac0270a718979bedf634a6dbe0c029d3d54a262355b]]

**Notice of Electronic Filing (NEF)**

- The **Notice of Electronic Filing (NEF)** is displayed.
- This is your “receipt” of the filing.
- The NEF has four informational sections:
  - The docketing information section includes when the entry was made, the document number, and the docket text.
  - The electronic notification section displays the names and e-mail addresses of attorneys/parties that have been electronically noticed.
  - The manual notification section displays any names and addresses of recipients that must be served by non-electronic means. If there are name(s) and addresses displayed below the **“Notice has been mailed by the filer to:”** you must print a copy of the NEF and mail along with the document(s) you filed to the parties displayed. You will generally see names and addresses for pro se parties and attorneys that may not be registered to be an e-filer.
  - The fourth section lists electronic document stamp(s) for each PDF document submitted and serves as a security feature. The document stamp(s) are kept separately and are compared routinely against the document stamp that is embedded in the PDF document.

**Frame 5-20**

**Note: The Notice of Electronic Filing is your proof of filing and indicates the completion of the filing event. You may print the Notice of Electronic Filing for your records. If you have PDF creation software, you can print this NEF to a PDF document as well. You can always get a copy from the docket sheet. However, you will incur PACER charges to get a copy.**


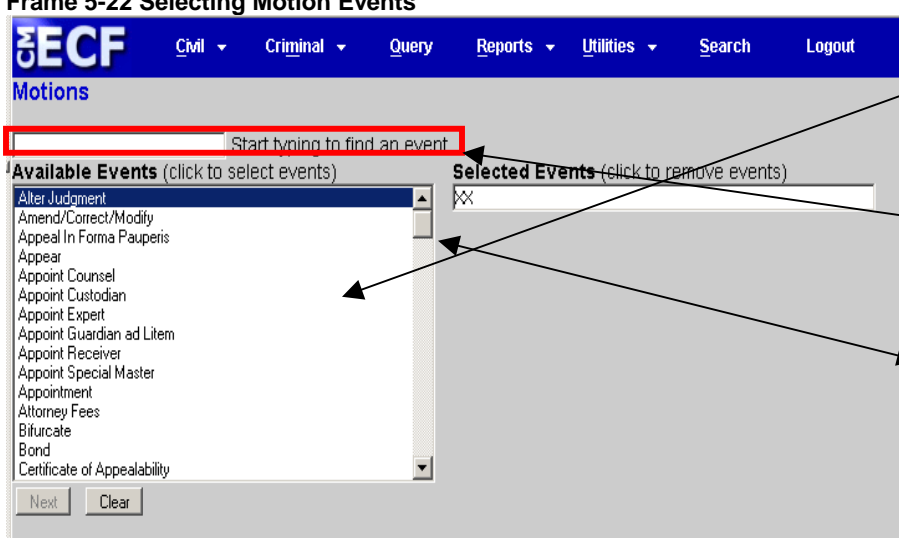
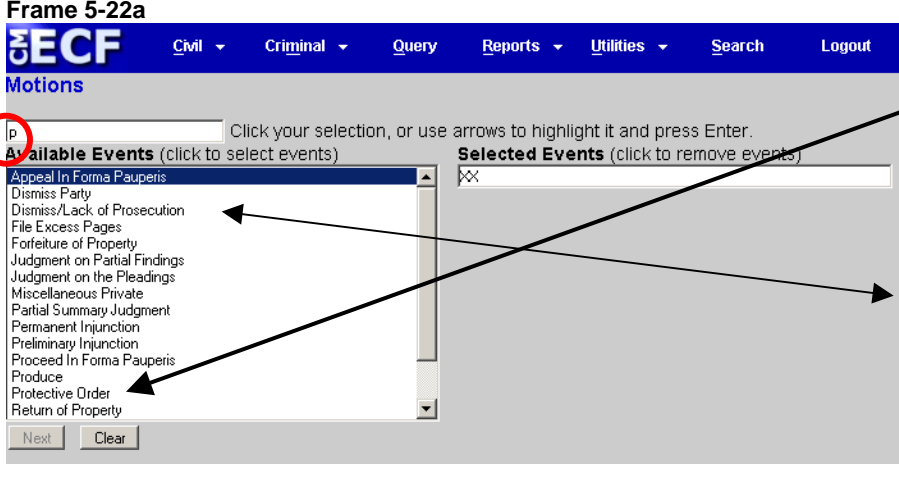
After a document is electronically filed, the ECF system sends a Notice of Electronic Filing to the designated attorneys and parties who have supplied their e-mail addresses to the court. Individuals who receive electronic notification of the filing are permitted “one free look” at the document by clicking on the associated hyperlinked document number embedded in the Notice of Electronic Filing. The filer is permitted “one free look” at the document and the docket sheet to verify that the document was properly docketed.

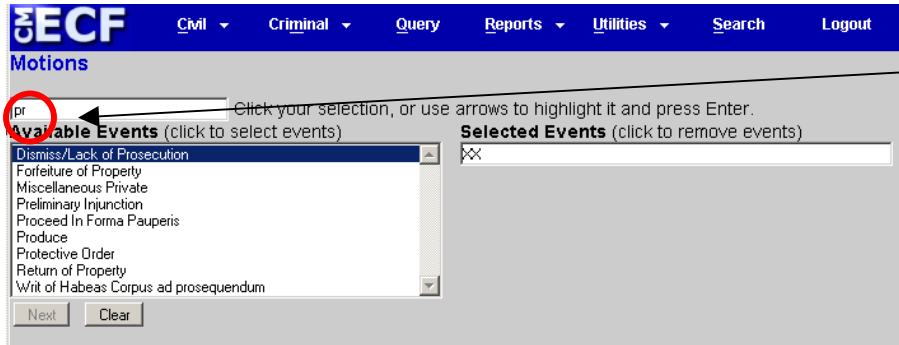
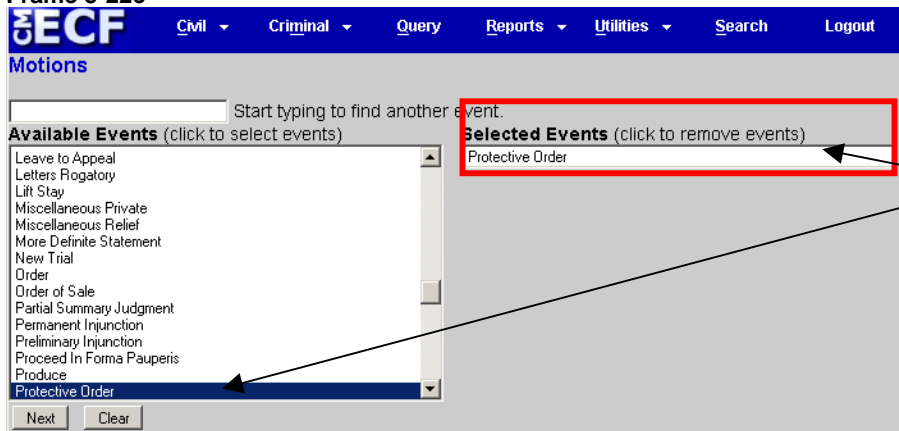
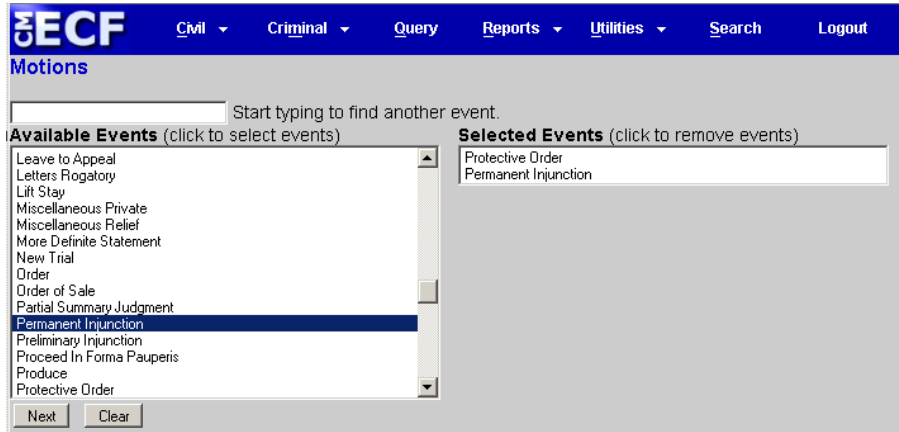
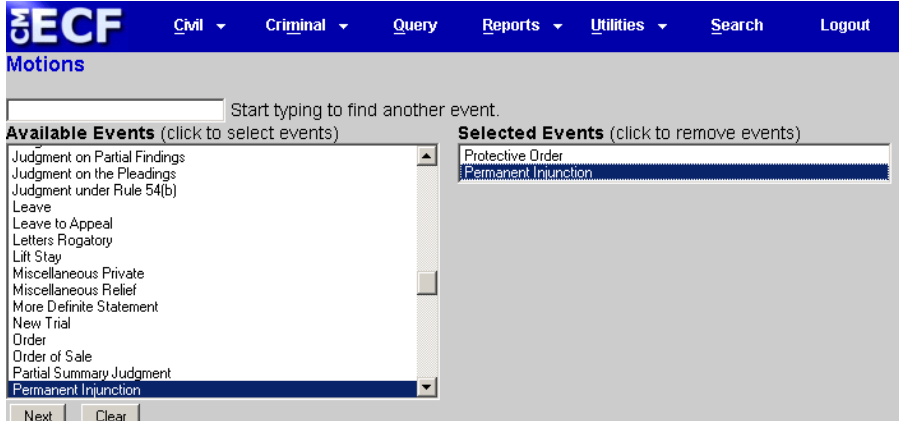
**Note: Users may not use the court’s electronic notice facilities for parties listed in the “Notice has been mailed by the filer to:” section. The user filing the document is required to serve these documents in paper format in accordance with the rules. Only users listed in the “Notice has been electronically mailed to:” section have consented to receive notice electronically.**

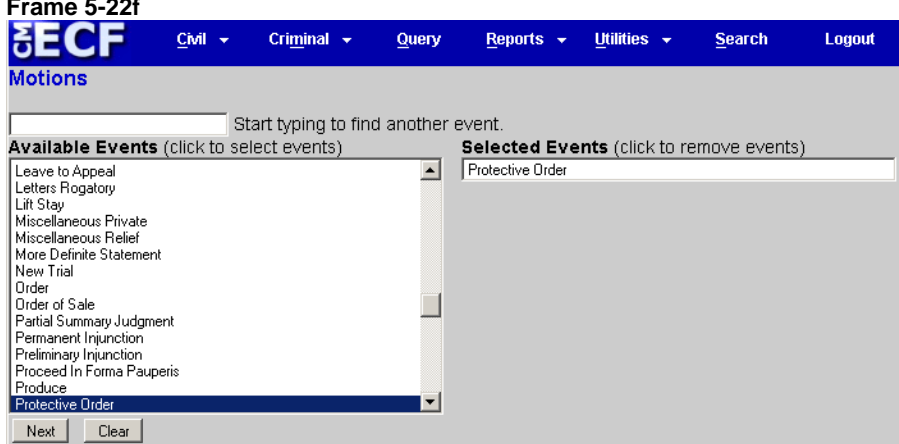
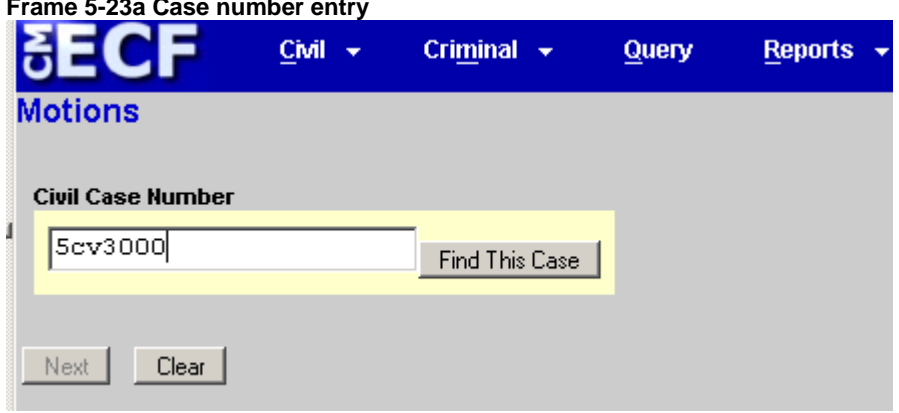
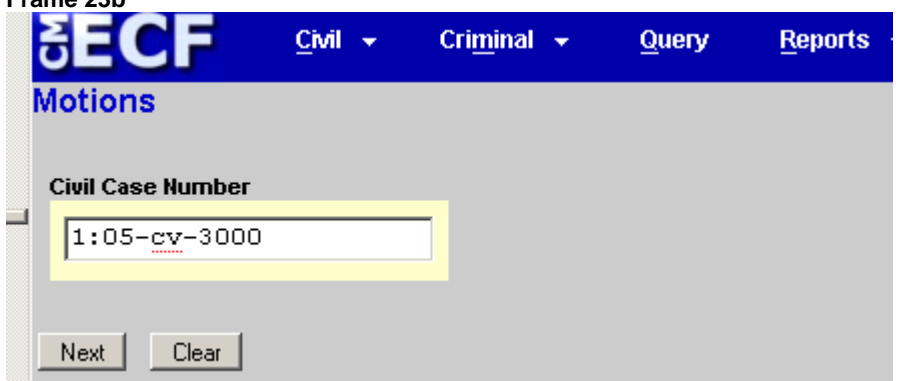
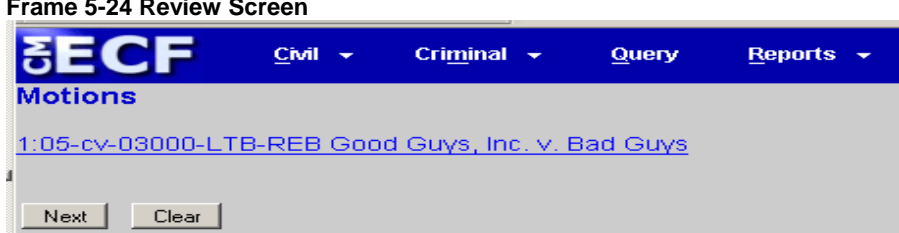


## Filing a Motion

As an additional illustration, this section of the User Manual describes the basic steps you will need to take to file a **motion** with the court. The process for filing other types of documents using other civil events is similar.

<p><b>Frame 5-21 Selecting Motion category</b></p> 	<ul style="list-style-type: none"> <li>Using the cascading menus or clicking on the <b>Civil</b> option on the CM/ECF Blue Menu Bar will display the Civil Events page of categories.</li> <li>Click on the <b>Motions</b> link.</li> </ul>
<p><b>Frame 5-22 Selecting Motion Events</b></p> 	<p>Selecting Motion Events</p> <ul style="list-style-type: none"> <li>A list all of the motion events are displayed alphabetically.</li> <li>In the search text box, you can enter the beginning letters of the motion event you want to select.</li> <li>You may also scroll up/down the scroll bar in the “<b>Available events</b>” list to facilitate your selection of motion events.</li> </ul>
<p><b>Frame 5-22a</b></p> 	<p>Searching for motions from the motions list</p> <ul style="list-style-type: none"> <li>For example, if we want to find “protective order”, we can start by entering pro....</li> <li>The Available Events list displays events that have a word starting with the letters entered.</li> </ul> <p><b>Note:</b> After entering ‘p’, Appeal In Forma Pauperis, Dismiss Party, etc. are also displayed. The search finds any word, beginning with the letter(s) entered, regardless of position. Therefore, “wild card characters will not work.</p>

<p><b>Frame 5-22b</b></p>  <p>Click your selection, or use arrows to highlight it and press Enter.</p> <p>Available Events (click to select events)</p> <p>Selected Events (click to remove events)</p> <p>Next Clear</p>	<p>Searching for motions from the motions list</p> <ul style="list-style-type: none"> <li>• If you enter more letters, the display list will be further refined.</li> <li>• If we add the letter 'r', the list of events changes as any motion event having 'pr' are displayed.</li> </ul>
<p><b>Frame 5-22c</b></p>  <p>Start typing to find another event.</p> <p>Available Events (click to select events)</p> <p>Selected Events (click to remove events)</p> <p>Next Clear</p>	<p>Searching for motions from the motions list</p> <ul style="list-style-type: none"> <li>• You can continue to enter more letters, or if the event is listed, you can click on the event to select.</li> </ul>
<p><b>Frame 5-22d</b></p>  <p>Start typing to find another event.</p> <p>Available Events (click to select events)</p> <p>Selected Events (click to remove events)</p> <p>Next Clear</p>	<p>Selecting the specific motion and selecting multiple motions</p> <ul style="list-style-type: none"> <li>• Once you click on the event, it's displayed in the <b>Selected Events</b> display box.</li> <li>• You can select multiple events by clicking on other events from the <b>Available Events</b> list.</li> <li>• For example, if "Permanent Injunction" is clicked from the <b>Available Events</b> list, it's added to the <b>Selected events</b> list.</li> <li>• Whatever is in the "<b>Selected Events</b>" list when the <b>Next</b> button is clicked, will be the motion event(s) filed.</li> </ul>
<p><b>Frame 5-22e</b></p>  <p>Start typing to find another event.</p> <p>Available Events (click to select events)</p> <p>Selected Events (click to remove events)</p> <p>Next Clear</p>	<p>Removing a selected motion from the selected list</p> <ul style="list-style-type: none"> <li>• If you want to remove any of the events from the "<b>Selected Events</b>" list, you click on the event in the "<b>Selected events</b>" list. Once it's clicked on, it will be removed from the "<b>Selected events</b>" list.</li> </ul>

<p><b>Frame 5-22f</b></p> 	<p>Finish selecting motion events</p> <ul style="list-style-type: none"> <li>Once all of the motion events you want to file are in the <b>“Selected events”</b> list, you can click on the <b>Next</b> button.</li> </ul>
<p><b>Frame 5-23 Case number entry</b></p> <p><b>Note:</b> These examples below do not display all of the possible screens that can be encountered when a case number is being entered for the sake of brevity. Review Frames 5-2a through 5-2g for more detail as to what can be seen for errors, duplicate case numbers, etc.</p> <p><b>Note:</b> ECF defaults to the last case from which you worked. Ensure the proper case number is entered in this field to avoid filing your document in the wrong case.</p>	
<p><b>Frame 5-23a Case number entry</b></p> 	<ul style="list-style-type: none"> <li>Identify the Case for Which the Document is Being Filed.</li> <li>Enter the number of the case for which the document is being filed.</li> </ul> <p><b>Note:</b> The <b>Next</b> button is grayed out which indicates the button is not functional until a valid case is entered.</p> <ul style="list-style-type: none"> <li>Once you begin to enter a case number, the <b>Find This Case</b> button is displayed. After entering the entire case click on the <b>Find This Case</b> button.</li> </ul>
<p><b>Frame 23b</b></p> 	<ul style="list-style-type: none"> <li>The case number is valid and the <b>Next</b> button is darkened, so you can click on it to continue.</li> <li>Click on the <b>[Next]</b> button</li> </ul>
<p><b>Frame 5-24 Review Screen</b></p> 	<p>Review Screen</p> <ul style="list-style-type: none"> <li>After clicking on the <b>Next</b> button, a review screen is displayed.</li> <li>Click on the <b>Next</b> button to continue.</li> </ul>

**Frame 5-25 Selecting the filer**



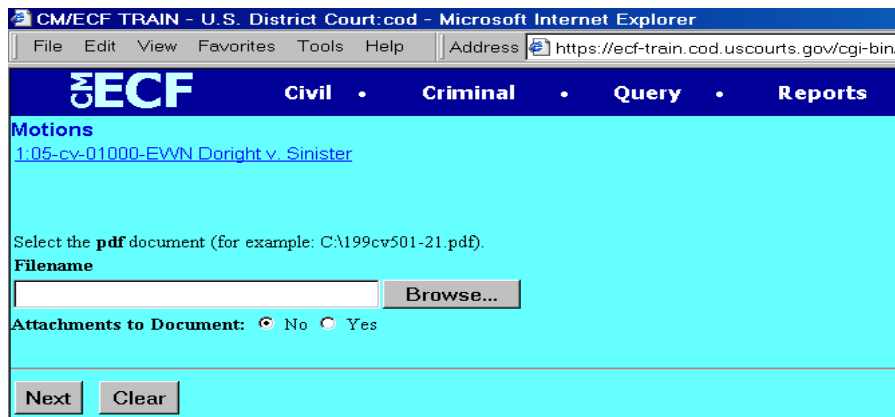
Selecting the filer

- Highlight the name of the party for whom you are filing the document. If you represent more than one party, select multiple parties by holding down the **[CTRL]** key while pointing and clicking on each party you represent
- If done correctly, each party selected will remain highlighted.
- After highlighting the parties to the document, click on the **[Next]** button.

**Frame 5-26**

**Note:** If the list depicted does not display the party or parties a user represents, contact the Help Desk at 1-866-365-6381 or 303-335-2050 Monday thru Friday, from 8:00 a.m. to 5:00 p.m. (Mountain Time) with your party's information. Only court personnel can add or create new parties to a case. If you click on the Add/Create New Party hyperlink, ECF returns an error message advising you of this restriction.

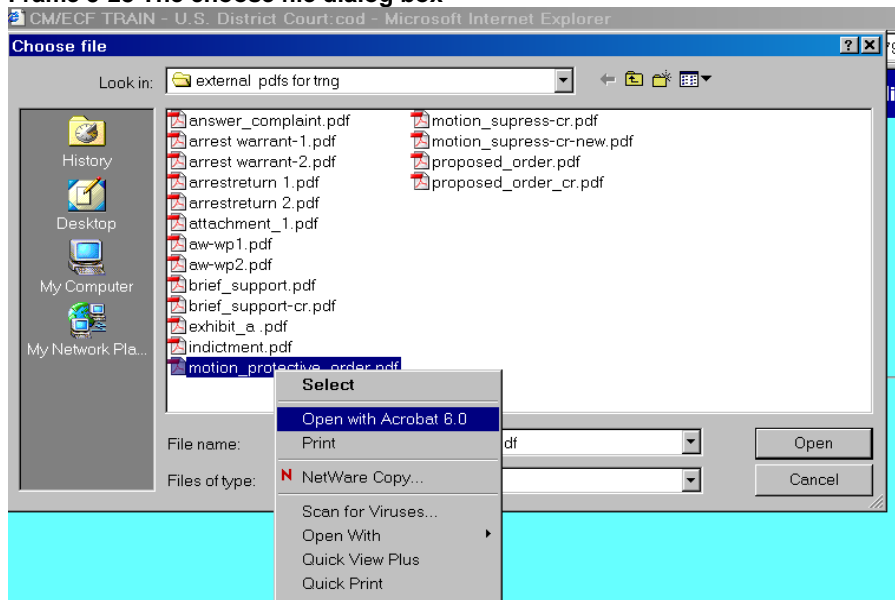
**Frame 5-27 Attaching the main PDF document**



Attaching the main PDF document

- Click the **[Browse]** button.
- The Choose File dialog box will appear and you can navigate to the folder (or location) where you have the PDF document.
- The court highly recommends you right click and open the document up in Adobe Reader (or Adobe Acrobat) to view the PDF document to ensure it is the correct PDF document you wish to file.

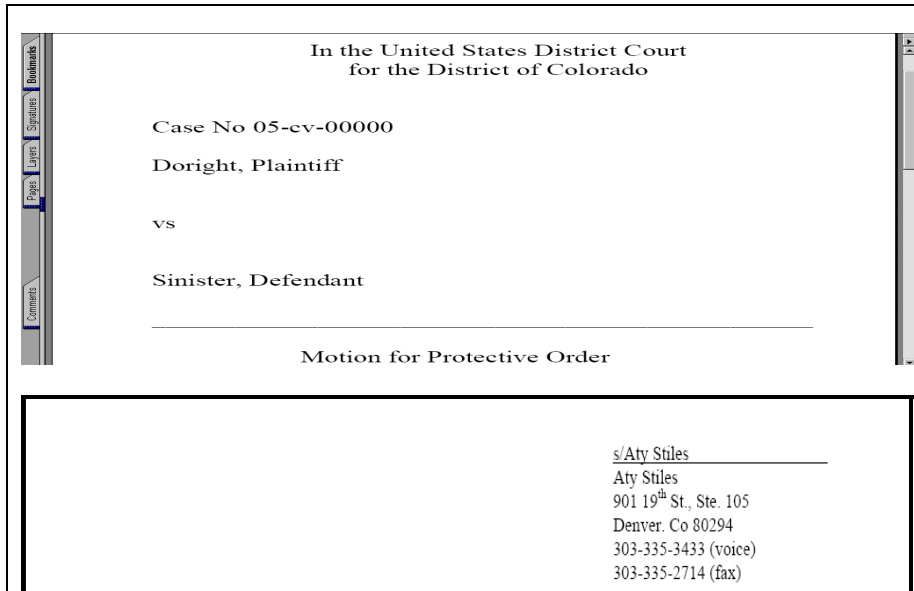
**Frame 5-28 The choose file dialog box**



- There are file size limits for each PDF document. The maximum file size limit can be found by going to the **Utilities** section and clicking on the **Court Information** link. The court information page is displayed.

- One of the items on the Court Information page is the **maximum** file size for PDF files being submitted to ECF.

**Note:** The maximum file size is per PDF document. Your total filing may exceed the per document maximum. For example, your main document is 2MB, Exhibit A is 4.9 MB, and Exhibit B is 3 MB. All three documents equal 9.9 MB.



- When viewing the PDF document, check the document for items such as:
  - court
  - case number and style
  - parties
  - correct document
- The signature (i.e. s/ and the attorney name)

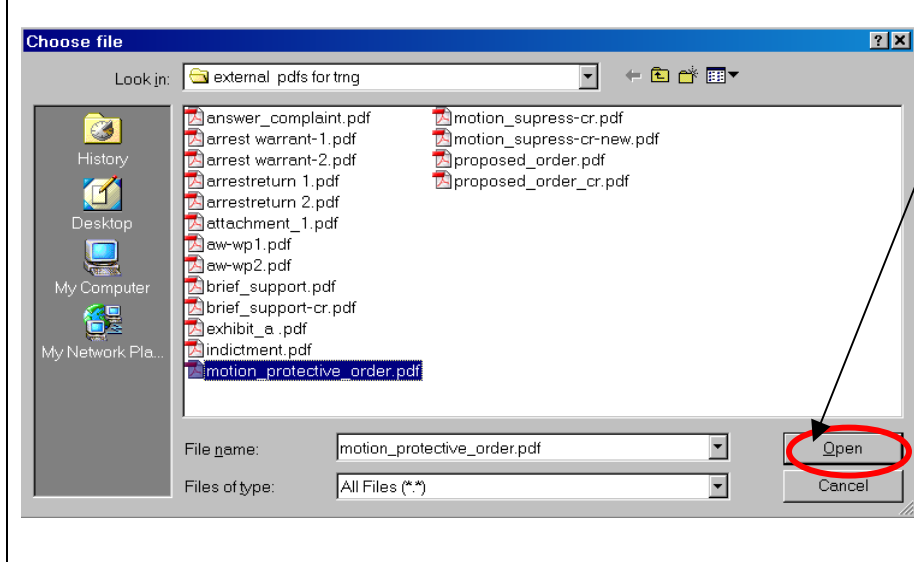
**Frame 5-29 Review the PDF document**



Review the PDF document

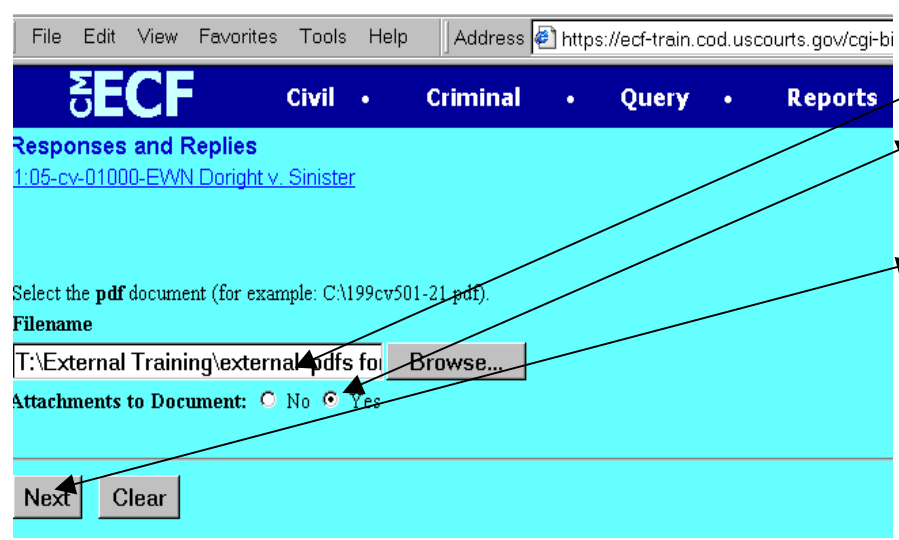
- After viewing the PDF document, close the Adobe application by **[clicking]** in the "x" in the top right corner of the Adobe application.

**Frame 5-30 Adding the PDF filename**



- Click on the **[OPEN]** button to populate the entry box for the filename.

**Frame 5-31 Attaching the main PDF document (continued)**

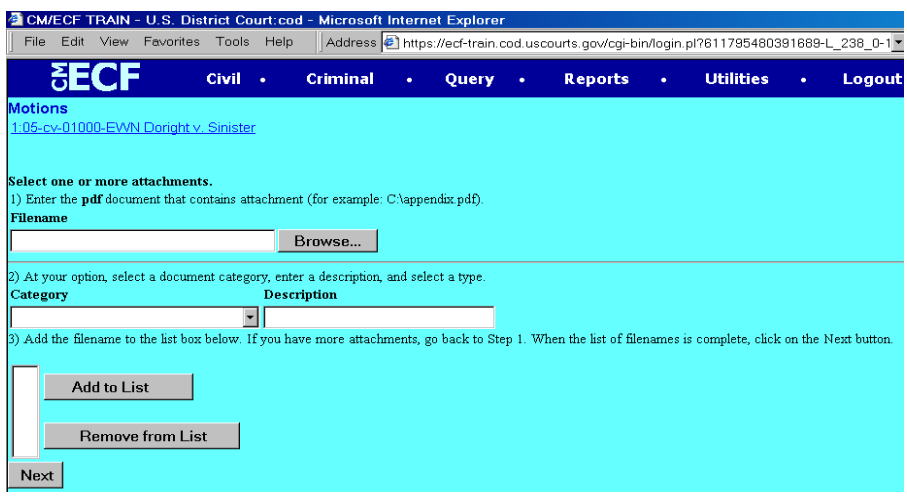


- The Filename box is now filled with the name of the main document.
- If there are attachments to the main document, click on the **[yes]** radio button.
- Click the **[NEXT]** button.

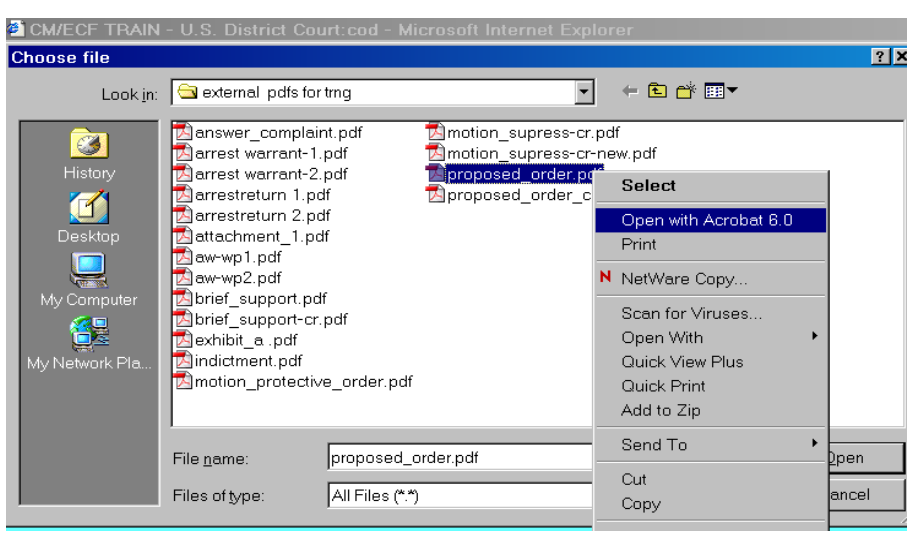
**Attaching additional documents to the main document**

- The attachment screen is displayed
- Click the **[Browse]** button.

**Frame 5-32 Attaching additional documents to the main document**



**Frame 5-33 The choose file dialog box**



**The choose file dialog box**

- The Choose File dialog box will appear and you can navigate to the folder (or location) where you have the PDF document.
- The court highly recommends you right click and open the document up in Adobe Reader (or Adobe Acrobat) to view the PDF document to ensure it is the correct PDF document you wish to file.
- After viewing the PDF document, **[Click]** the Open button to populate the ECF filename box

**Frame 5-34**

**Note:** These examples do not display the PDF documents for the sake of brevity. The court highly recommends you ALWAYS view the PDF document(s) and any attachments to ensure you are filing the correct documents in the ECF application.

**Frame 5-35 Adding to the attachment list**

**Frame 5-36 Categorizing and describing your attachments**

In this example, we've selected the "Proposed Order (PDF Only)" from the Category list. We do not need to enter any more descriptive text.

**NOTE:** Whatever is selected from the Category list is concatenated with text entered in the Description field. If "Exhibit" is selected from the Category list and "A" is entered in the Description field, the docket text will read "Exhibit A"

**Adding to the attachment list**

- The Filename entry box should be filled in with the attachment.
- Under the Category entry box, there is a drop down arrow to allow you to select the type of attachment it is.
- Click on the drop down arrow to see the list of attachment types. If the type does not fit the attachment, select the blank entry.
- You can enter a description to provide additional information.
- For example, if you have to break up an exhibit, you can enter the page numbers of the exhibit being submitted. In the Description field you can enter Pages 1 – 30 of Exhibit A.

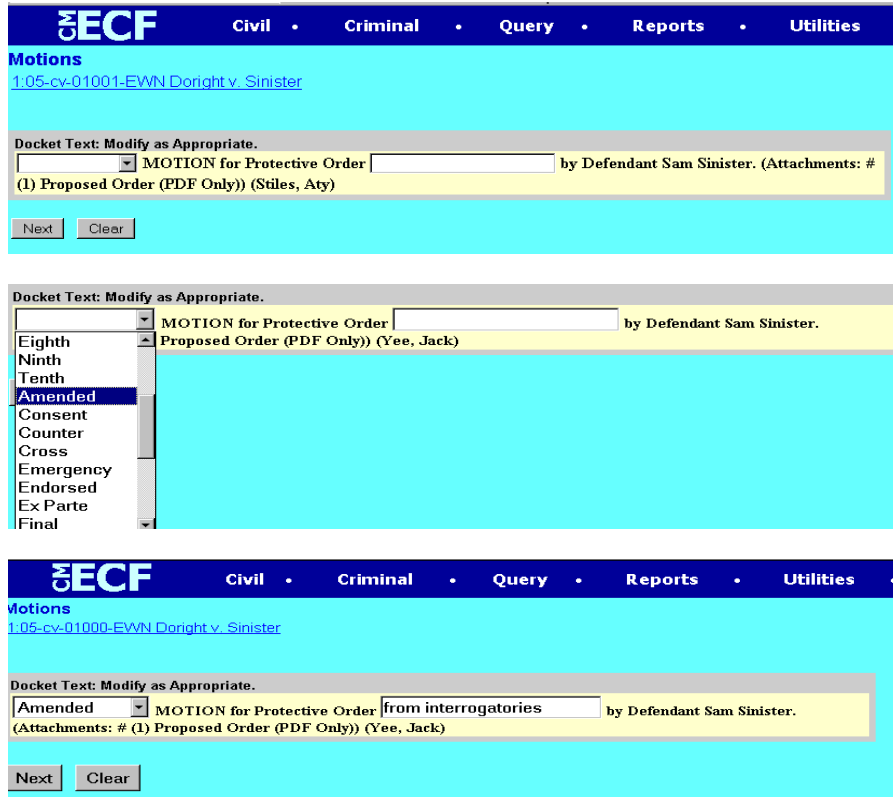
**Frame 5-37 Add to list box**

**Add to list box**

- Click on the **[Add to List]** button.
- The filename of the attachment is displayed in the list box.
- **Repeat** the steps above to add additional attachments.
- In this example, we have only one attachment.
- Click the **[NEXT]** button.



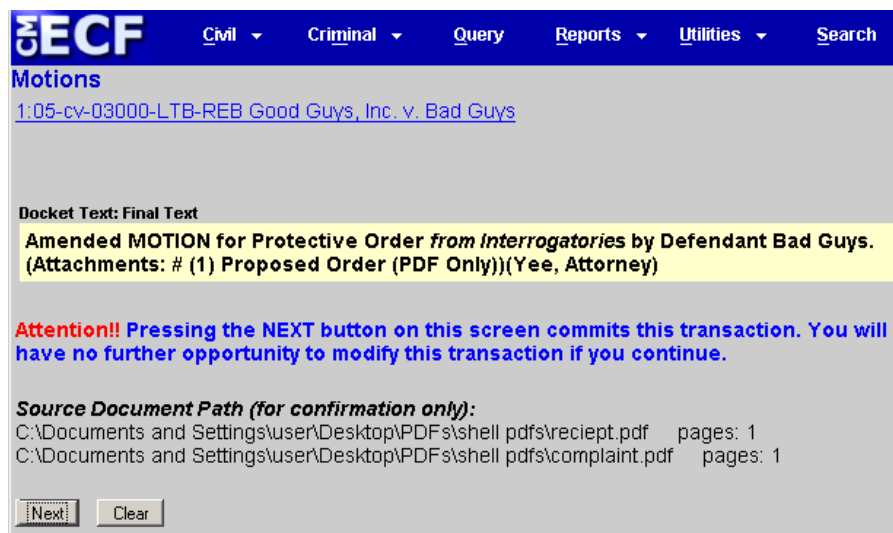
**Frame 5-38 Docket text modification screen**



**Docket text modification screen**

- The Docket Text modification screen is displayed.
- This screen allows you to enter **optional** docket modification text.
- The “drop down” list allows you to select predetermined modifiers. **You cannot enter text in this box.** This is **optional**.
- In our example, we’ll select “Amended” as a modifier.
- In the text entry box, we’ll enter “from interrogatories” to further describe the motion we are filing. Again, this is option. However, this modification can be helpful to assist you in locating a motion for viewing or linking in the future.
- After enter text or leaving blank, click on the **[Next]**

**Frame 5-39 Final screen**



**Completing the Transaction**

- **THIS IS THE “LAST” SCREEN FOR YOU TO REVIEW!!**
  - If you click the **NEXT** button, the transaction is posted to the database.
  - An informational message as to the path and filename of the PDF document is displayed for review. This provides the user a “final” opportunity to check the filename as to it being the correct document. **If it’s not the correct document, you should abort this transaction and start over again.**
- Note:** You **CANNOT** view any of the actual the document(s), only the path, filename, and number of pages.
- Click on the **[Next]** button to commit the transaction.

**Frame 5-40**

**Note:** ECF displays a “Final warning” indicating if the [Next] button is clicked, the transaction is completed and it is entered into the ECF database and the Notice of Electronic Filing (NEF) is created and displayed. The NEF is then queued up to be sent via e-mail to parties in the case.

**Note:** At any time prior to this step, you can abort the ECF filing by simply clicking on a menu item on the blue menu bar, including logging out of the system. Users should avoid using the [Back] button as page information is NOT cached and the user will encounter problems. It’s easier to just start over



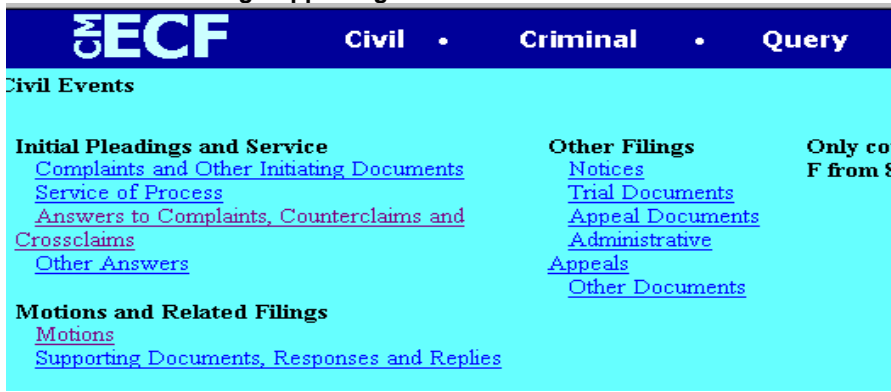
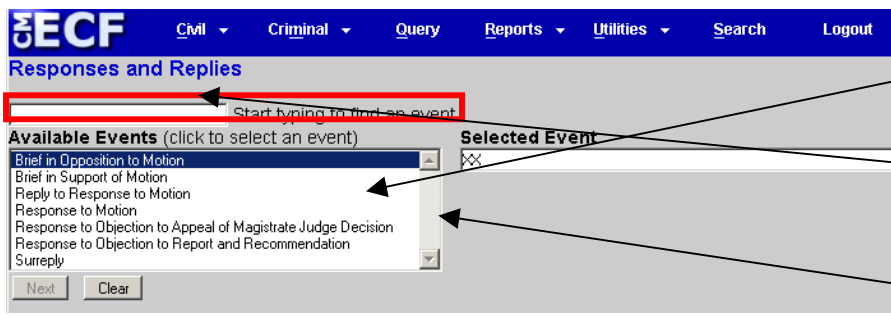
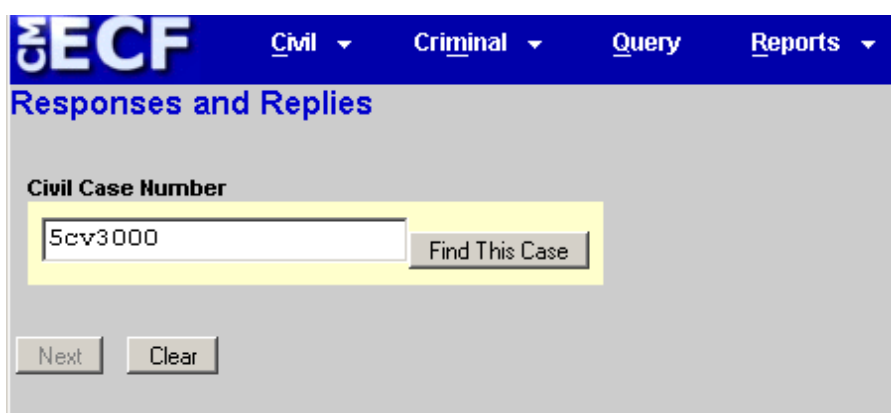
**Frame 5-41 the Notice of Electronic Filing (NEF)**

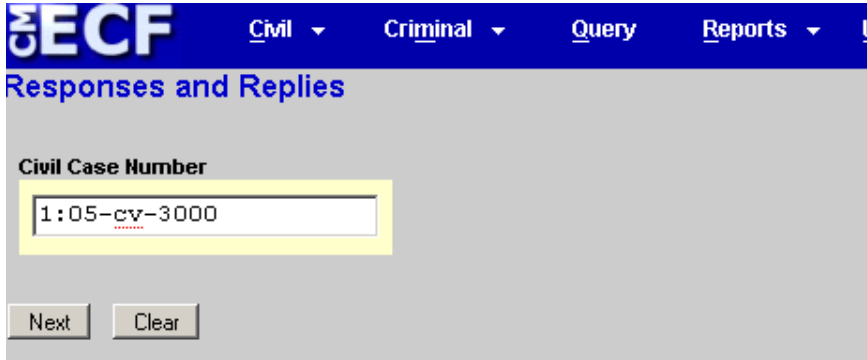


**Notice of Electronic Filing (NEF)**

- The **Notice of Electronic Filing (NEF)** is displayed.
- This is your “receipt” of the filing.
- The NEF has four informational sections:
  - The docketing information section includes when the entry was made, the document number, and the docket text.
  - The electronic notification section displays the names and e-mail addresses of attorneys/parties that have been electronically noticed.
  - The manual notification section displays any names and addresses of recipients that must be served by non-electronic means. If there are name(s) and addresses displayed below the **“Notice has been mailed by the filer to:”** you must print a copy of the NEF and mail along with the document(s) you filed to the parties displayed. You will generally see names and addresses for pro se parties and attorneys that may not be registered to be an e-filer.
  - The fourth section lists electronic document stamp(s) for each PDF document submitted and serves as a security feature. The document stamp(s) are kept separately and are compared routinely against the document stamp that is embedded in the PDF document.

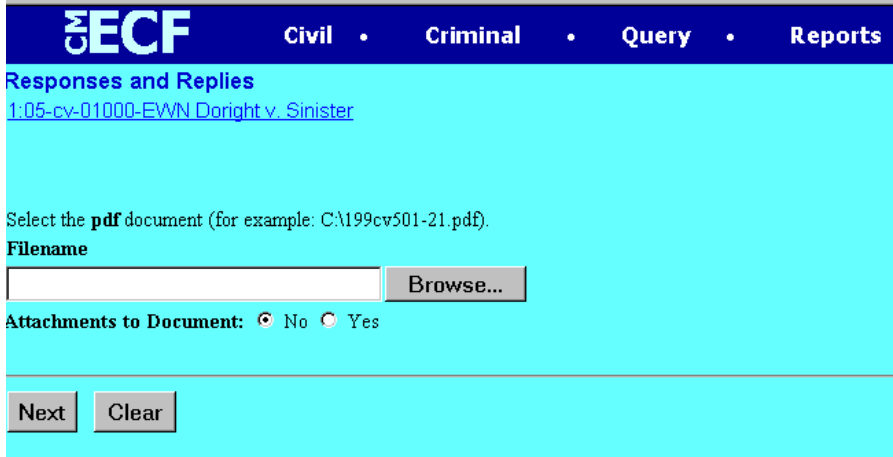
### Filing a Brief in Support of a Motion

As a further illustration, we'll file a brief in support of a motion. Since this repeats screen samples from previous examples, these illustrations will not display all of PDF documents.

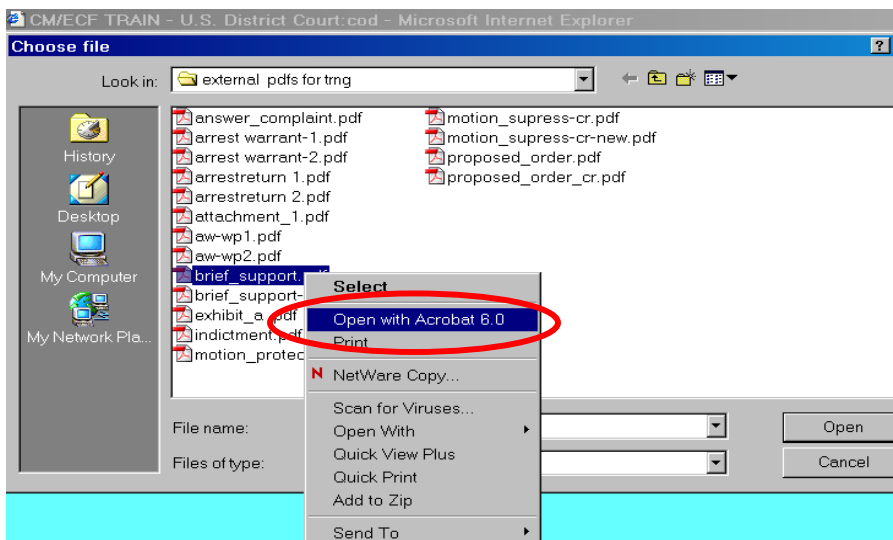
<p><b>Frame 5-42 Selecting Supporting Documents</b></p> 	<p>Selecting supporting documents</p> <ul style="list-style-type: none"> <li>The user should click on <b>Supporting Documents, Responses and Replies under Motions and Related Filings</b>.</li> </ul>
<p><b>Frame 5-43 Selecting the type of supporting document</b></p> 	<p>Selecting Supporting Documents, Responses and Reply Events</p> <ul style="list-style-type: none"> <li>A list all of the events are displayed alphabetically.</li> <li>In the search text box, you can enter the beginning letters of the motion event you want to select.</li> <li>You may also scroll up/down the scroll bar in the “<b>Available events</b>” list to facilitate your selection of motion events/</li> </ul>
<p><b>Note:</b> These examples below do not display all of the possible screens that can be encountered when a case number is being entered for the sake of brevity. Review Frames 5-2a through 5-2g for more detail as to what can be seen for errors, duplicate case numbers, etc.</p>	
<p><b>Frame 5-44 Case number entry</b></p> 	<p>Case number entry</p> <ul style="list-style-type: none"> <li>Enter the number of the case for which the document is being filed</li> <li>If you submit a case number that is formatted incorrectly, ECF will prompt an error message advising you of the correct format for entering the case number.</li> <li>Click <b>[OK]</b> to acknowledge and close the error message. Click the <b>[Clear]</b> button on the Case Number screen and re-enter the case number in the correct format.</li> <li>Click on the <b>[Next]</b> button.</li> </ul>
<p><b>Frame 5-45</b></p> <p><b>Note:</b> ECF defaults to the last case from which you worked. Ensure the proper case number is entered in this field to avoid filing your document in the wrong case.</p>	

<p><b>Frame 5-46 Case Number Valid</b></p>  <p>The screenshot shows the ECF interface with a blue header containing the ECF logo and navigation tabs: Civil, Criminal, Query, Reports, and Utilities. Below the header is the title "Responses and Replies". A form labeled "Civil Case Number" contains the text "1:05-cv-3000" and is highlighted with a yellow border. Below the form are "Next" and "Clear" buttons.</p>	<ul style="list-style-type: none"><li>• The case number is valid and the <b>Next</b> button is darkened, so you can click on it to continue.</li><li>• Click on the <b>[Next]</b> button</li></ul>
<p><b>5-46a Review Screen</b></p>  <p>The screenshot shows the ECF interface with a blue header containing the ECF logo and navigation tabs: Civil, Criminal, Query, Reports, Utilities, and Search. Below the header is the title "Responses and Replies". A link "1:05-cv-03000-LTB-REB Good Guys, Inc. v. Bad Guys" is displayed. Below the link are "Next" and "Clear" buttons.</p>	<p>Review Screen</p> <ul style="list-style-type: none"><li>• After clicking on the <b>Next</b> button, a review screen is displayed.</li></ul> <p>Click on the <b>Next</b> button to continue Designating the party filing</p>
<p><b>Frame 5-46b Designating the party filing</b></p>  <p>The screenshot shows the ECF interface with a blue header containing the ECF logo and navigation tabs: Civil, Criminal, Query, Reports, Utilities, Search, and Logout. Below the header is the title "Responses and Replies". A link "1:05-cv-03000-LTB-REB Good Guys, Inc. v. Bad Guys" is displayed. The main content area is titled "Select the filer." and contains two sections: "Select the Party:" with a dropdown menu showing "Bad Guys (Defendant)" and "Good Guys, Inc. (Plaintiff)", and "OR Select a Group:" with radio buttons for "No Group", "All Defendants", "All Plaintiffs", and "All Parties". A link "Add/Create New Party" is also present. Below the form is a red notice: "Only court personnel can add new parties. Contact the Help Desk at 1-866-365-6381 or 303-335-2050 Monday - Friday, from 8:00 a.m. to 5:00 p.m. (MDT/MST) with the parties you wish to add." Below the notice are "Next" and "Clear" buttons.</p>	<p>Designating the party filing</p> <ul style="list-style-type: none"><li>• Highlight the name of the party for whom you are filing the document. If you represent more than one party, select multiple parties by holding down the <b>[CTRL]</b> key while pointing and clicking on each party you represent.</li><li>• If done correctly, each party selected will remain highlighted.</li><li>• After highlighting the parties to the document, click on the <b>[Next]</b> button</li></ul>
<p><b>Frame 5-47</b></p> <p><b>Note:</b> If the list depicted does not display the party or parties a user represents, contact the Help Desk at 1-866-365-6381 or 303-335-2050 Monday thru Friday, from 8:00 a.m. to 5:00 p.m. (Mountain Time) with your party's information. Only court personnel can add or create new parties to a case. If you click on the Add/Create New Party hyperlink, ECF returns an error message advising you of this restriction.</p>	

**Frame 5-48 Attaching the main PDF document**



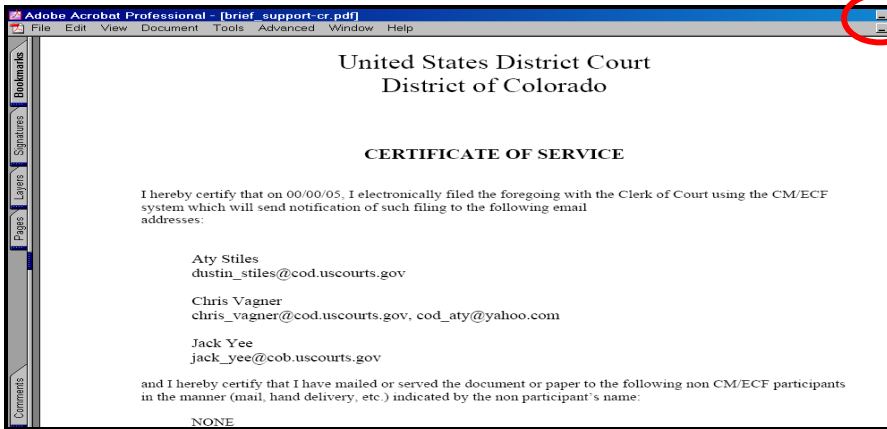
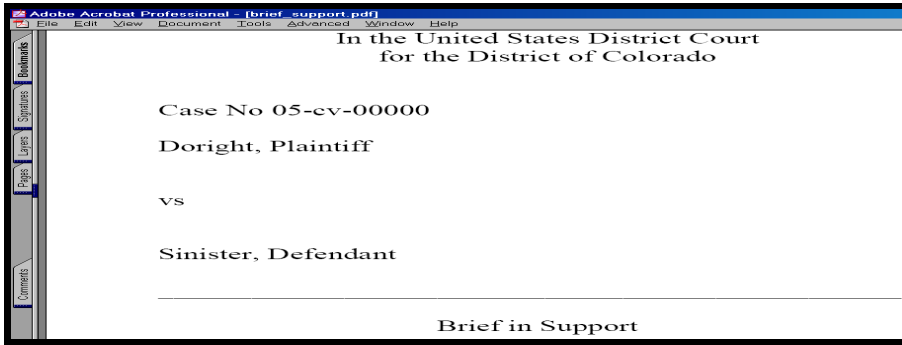
**Frame 5-49 The choose file dialog box**



Attaching the main PDF document

- Click the **[Browse]** button.
- The Choose File dialog box will appear and you can navigate to the folder (or location) where you have the PDF document.
- The court highly recommends you right click and open the document up in Adobe Reader (or Adobe Acrobat) to view the PDF document to ensure it is the correct PDF document you wish to file.
- There are file size limits for each PDF document. The maximum file size limit can be found by going to the **Utilities** section and clicking on the [Court Information](#) link. The court information page is displayed.
- One of the items on the Court Information page is the **maximum** file size for PDF files being submitted to ECF.
- **Note:** The maximum file size is per PDF document. Your total filing may exceed the per document maximum. For example, your main document is 2MB, Exhibit A is 4.9 MB, and Exhibit B is 3 MB. All three documents equal 9.9 MB.
- After viewing the PDF document, close the Adobe application by **[clicking]** in the "x" in the top right corner of the Adobe application.
- Click on the **[OPEN]** button to populate the entry box for the filename.

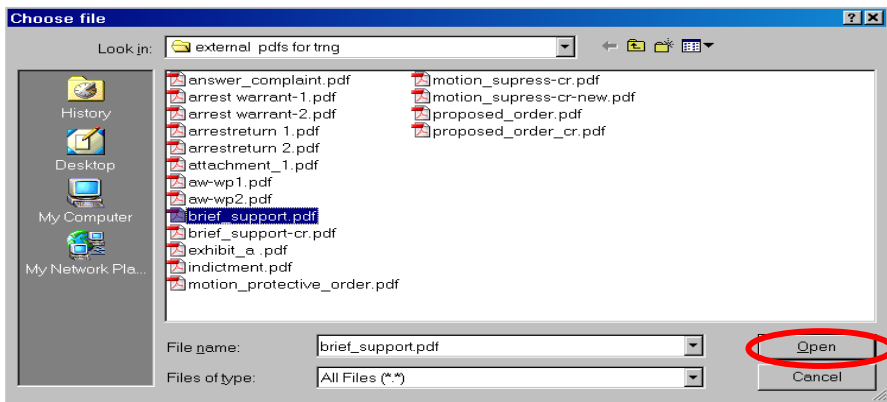
### Frame 5-50 Review the PDF document



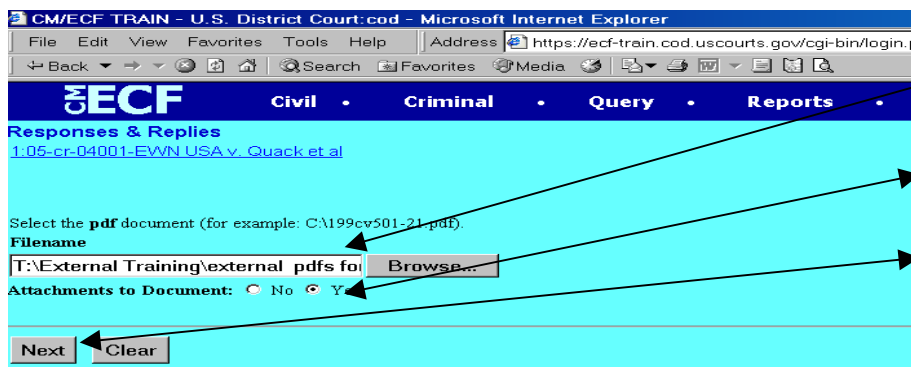
### Review the PDF document

- When viewing the PDF document, check the document for items such as:
  - court
  - case number and style
  - parties
  - correct document
- The signature (i.e. s/ and the attorney name
- After viewing the PDF document, close the Adobe application by **[clicking]** in the “x” in the top right corner of the Adobe application.
- Click on the **[OPEN]** button to populate the entry box for the filename.

### Frame 5-51 Adding the PDF filename



**Frame 5-52 Attaching the main PDF document (continued)**

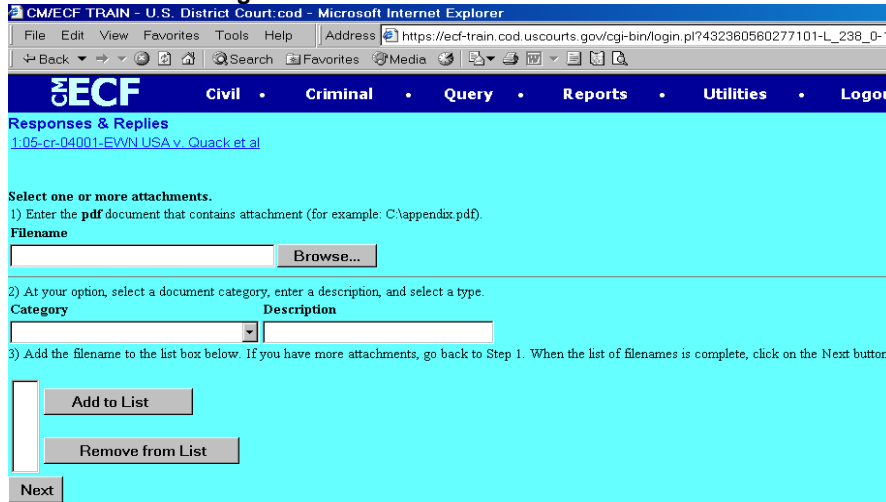


Attaching the main PDF document (continued)

- The Filename box is now filled with the name of the main document.
- If there are attachments to the main document, click on the **[yes]** radio button.
- Click the **[NEXT]** button.

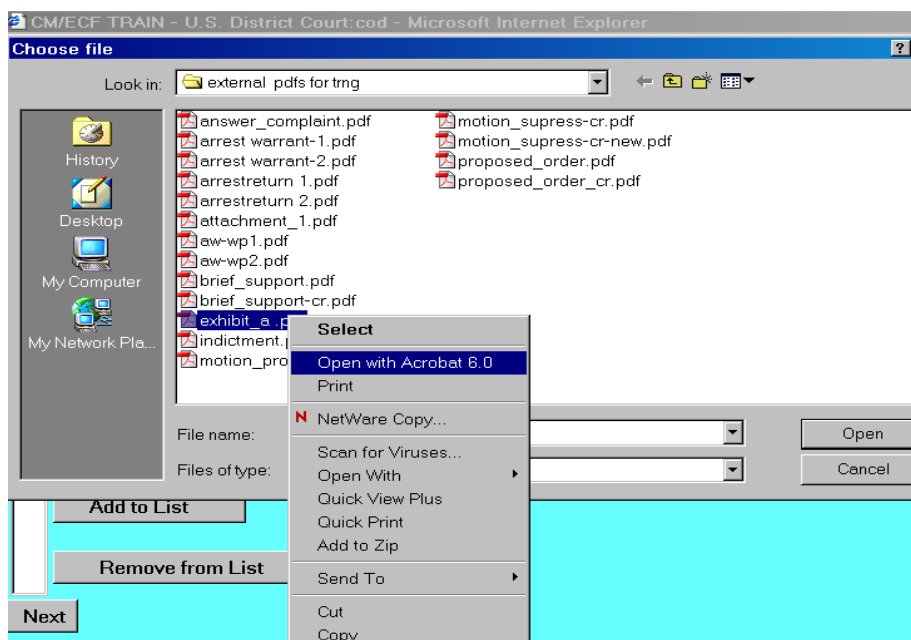
• Attaching additional documents to the main document

**Frame 5-53 Attaching additional documents to the main document**



- The attachment screen is displayed
- Click the **[Browse]** button.

**Frame 5-54 The choose file dialog box**



The choose file dialog box

- The Choose File dialog box will appear and you can navigate to the folder (or location) where you have the PDF document.
- The court highly recommends you right click and open the document up in Adobe Reader (or Adobe Acrobat) to view the PDF document to ensure it is the correct PDF document you wish to file.

**Frame 5-55**

**Note:** These examples do not display the PDF documents for the sake of brevity. The court highly recommends you ALWAYS view the PDF document(s) and any attachments to ensure you are filing the correct documents in the ECF application.

**Note:** Again, as a review,

1. View the PDF document.
2. Close out the Adobe application.
3. Populate the ECF filename box.
4. Select the predetermined category for the attachment (or select the “blank” category).
5. Enter more descriptive information, as needed.
6. [Click] on Add to List.
7. Repeat the attachment process for all of the attachments you wish to add.

**Frame 5-56**

**Note:** Repeat Frames 5-35 through Frame 5-37 for the second and succeeding attachments. In this illustration, there are two attachments. The next frame illustrates what the “List box” looks like after final attachment has been added.

**Frame 5-57 Add to list box**

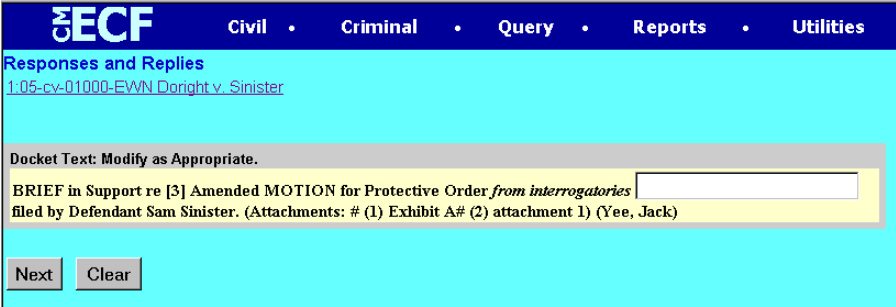
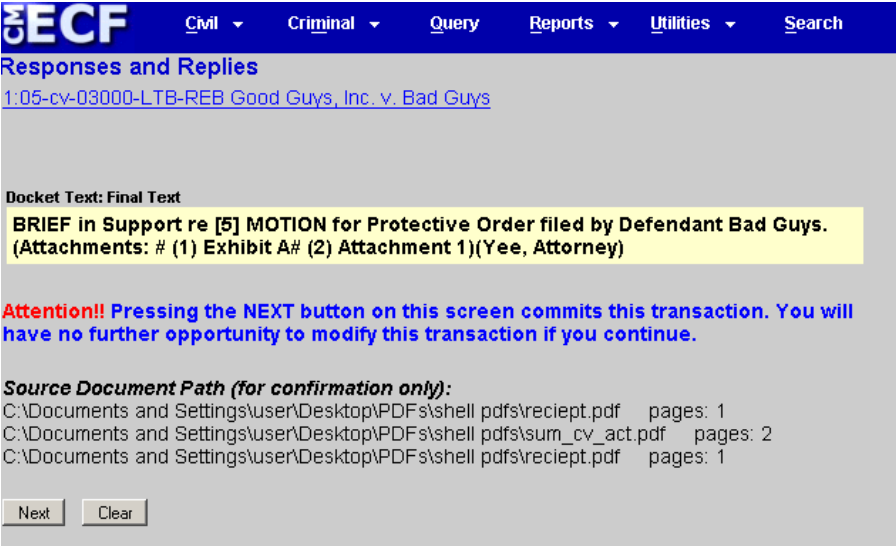
**Add to list box**

- The final attachment screen displays the two attachments in the List box.
  - Exhibit A
  - Attachment 1
- Click the [NEXT] button.

**Frame 5-58 Linking**

**Linking**

- This window allows the filer to link the brief with other documents that have been filed already. A list of previously filed documents appears. Documents such as briefs in support of a motion must link back to the motion.
- Using the mouse, select by clicking in the check box(es) provided, which documents you wish to link the brief to.
- Click on [Next]

<p><b>Frame 5-59 Docket text modification screen</b></p> 	<p>Docket text modification screen</p> <ul style="list-style-type: none"><li>• The Docket Text modification screen is displayed.</li><li>• This screen allows you to enter <b>optional</b> docket modification text.</li><li>• After enter text or leaving blank, click on the <b>[Next]</b></li></ul>
<p><b>Frame 5-60 Final screen</b></p> 	<p>Completing the Transaction</p> <ul style="list-style-type: none"><li>• <b>THIS IS THE “LAST” SCREEN FOR YOU TO REVIEW!!</b></li><li>• If you click the <b>NEXT</b> button, the transaction is posted to the database.</li><li>• An informational message as to the path and filename of the PDF document is displayed for review. This provides the user a “final” opportunity to check the filename as to it being the correct document. <b>If it’s not the correct document, you should abort this transaction and start over again.</b></li></ul> <p><b>Note:</b> You <b>CANNOT</b> view any of the actual the document(s), only the path, filename, and number of pages.</p> <ul style="list-style-type: none"><li>• Click on the <b>[Next]</b> button to commit the transaction.</li></ul>
<p><b>Frame 5-61</b></p> <div style="border: 2px solid black; padding: 10px;"><p><b>Note:</b> ECF displays a “Final warning” indicating if the [Next] button is clicked, the transaction is completed and it is entered into the ECF database and the Notice of Electronic Filing (NEF) is created and displayed. The NEF is queued up to be sent as an e-mail to parties.</p><p><b>Note:</b> At any time prior to this step, you can abort the ECF filing by simply clicking on a menu item on the blue menu bar, including logging out of the system. Users should avoid using the [Back] button as page information is NOT cached and the user will encounter problems. It’s easier to just start over</p></div>	



Frame 5-62 The Notice of Electronic Filing (NEF)	Notice of Electronic Filing (NEF)
<p>The following transaction was entered by Yee, Attorney on 6/4/2007 at 2:41 PM MDT and filed on 6/4/2007</p> <p><b>Case Name:</b> Good Guys, Inc. v. Bad Guys  <b>Case Number:</b> <a href="#">1:05-cv-3000</a>  <b>Filer:</b> Bad Guys  <b>Document Number:</b> <a href="#">12</a></p> <p><b>Docket Text:</b>      BRIEF in Support re [5] MOTION for Protective Order filed by Defendant Bad Guys. (Attachments: # (1) Exhibit A# (2) Attachment 1) (Yee, Attorney)</p> <p><b>1:05-cv-3000 Notice has been electronically mailed to:</b></p> <p>Another Goody cod_ewn@yahoo.com      Justa Goody cod_aty@yahoo.com      Dean Martin Leslie_A_Martin@cod.uscourts.gov      Leslie Martin leslie_a_martin@cod.uscourts.gov, gail_shaw@cod.uscourts.gov      Attorney Yee jack_yee@cod.uscourts.gov, jack_yee@cob.uscourts.gov</p> <p><b>1:05-cv-3000 Notice has been mailed by the filer to:</b></p> <p>Chris Vagner      Vagner and Yee      1234 N. 20th Street      Denver, CO 80294</p> <p>The following document(s) are associated with this transaction:</p> <p><b>Document description:</b>Main Document  <b>Original filename:</b>n/a  <b>Electronic document Stamp:</b>      [STAMP dcecfStamp_ID=1071006659 [Date=6/4/2007] [FileNumber=71584-0] [ 723931ae9e2bf64a53cf88b38b70b8862d9202f03732190e55f24aaa2728f59149af9c 60908eda58af6b576fe17db32f38d9e2e6b96e8d3cd74c14aa2c5675681]]  <b>Document description:</b>Exhibit A  <b>Original filename:</b>n/a  <b>Electronic document Stamp:</b>      [STAMP dcecfStamp_ID=1071006659 [Date=6/4/2007] [FileNumber=71584-1] [ 893bed91a38df62158d3b159a3585cb90211f3abfbf28bd0977387cc6eab0f43a8115 bb58ac13f325d71716b46e995d39a673c9c8bb04d1cce277252b4e5d33]]  <b>Document description:</b> Attachment 1  <b>Original filename:</b>n/a  <b>Electronic document Stamp:</b>      [STAMP dcecfStamp_ID=1071006659 [Date=6/4/2007] [FileNumber=71584-2] [ 70aa5363aad663e563a35881f3e88e816f26a07db59906fd2faffe14ae514aae21914a 4da15b38b7a15f0b7accb958eb13d8a29eabbd464fa8d897cc8d87e8e2]]</p>	<ul style="list-style-type: none"> <li>• The <b>Notice of Electronic Filing (NEF)</b> is displayed.</li> <li>• This is your “receipt” of the filing.</li> <li>• The NEF has four informational sections:             <ul style="list-style-type: none"> <li>• The docketing information section includes when the entry was made, the document number, and the docket text.</li> <li>• The electronic notification section displays the names and e-mail addresses of attorneys/parties that have been electronically noticed.</li> <li>• The manual notification section displays any names and addresses of recipients that must be served by non-electronic means. If there are name(s) and addresses displayed below the <b>“Notice has been mailed by the filer to:”</b> you must print a copy of the NEF and mail along with the document(s) you filed to the parties displayed. You will generally see names and addresses for pro se parties and attorneys that may not be registered to be an e-filer.</li> <li>• The fourth section lists electronic document stamp(s) for each PDF document submitted and serves as a security feature. The document stamp(s) are kept separately and are compared routinely against the document stamp that is embedded in the PDF document.</li> </ul> </li> </ul>

**Submitting a Proposed Order**

If the **judge’s chamber procedures call for proposed orders to be submitted**, registered users are required to submit proposed orders as PDF attachments to the motions requesting the relief to be ordered. The user shall also submit the proposed order in a WordPerfect (\*.wpd) or Word (\*.doc) format to the judicial officers assigned to the case. The proposed order shall be sent via e-mail to the chambers of the assigned district judge and magistrate judge. Users should review the proposed orders sections of the ECF Procedures for the District of Colorado for more information and for chambers e-mail addresses.

## Sealed Document Submission

Section VI of the ECF Procedures for the District of Colorado governs the filing of sealed documents. Sealed document submission falls into two categories, documents in sealed cases and sealed documents in public cases.

### Sealed Case Document Filing

A document filed in a sealed case must follow this procedure:

- The first document submitted in a sealed case by a party must be submitted in paper format.
- All subsequent documents should be filed electronically, unless the party has received different instructions from the court.
- Attorneys of record in the case may view sealed documents electronically by using the PACER system.
- All documents filed in a sealed case must be served in paper format. The court's electronic notice facilities will not be available on sealed documents.

### Sealed Document Filing in Public Cases

A sealed document filed in a public case must follow this procedure:

- A Motion to Seal must be submitted electronically in accordance with the Local Rules of this court.
- At the same time, the party should electronically submit the document under seal using the **Sealed Document** event. Parties should only submit sealed documents using the **Sealed Document** event. Any document submitted under a different event will not be sealed from public view.
- A Notice of Electronic Filing will be generated for the sealed document, but the document will not be viewable.
- Attorneys of record in the case may not view sealed documents electronically by using the PACER system.
- All sealed documents must be served in paper format. The court's electronic notice facilities will not be available on sealed documents.

All questions on sealed documents should be forwarded immediately to the ECF Help Desk.

## Privacy Policy

Documents with personal identifiers and other sensitive information should be filed electronically in accordance with the court's Privacy Policy. The Privacy Policy may be found in Section XI of the ECF Procedures for the District of Colorado.

## Motion Practice

Basic federal civil motion practice follows the listed filing progression: motion – response – reply. Users should make a point of following this practice when filing documents. A document filed by a party responding to the motion must be filed as a response. It should not be filed as a reply. A document filed by a party responding to a response is a reply. It is critical for users to choose the correct event for a document and to make sure the document name and event name match.

## Combining Documents

Combining documents is prohibited by local rule and should be avoided. D.C.COLO.LCivR 7.1.C. states, "A motion shall not be included in a response or reply to the original motion."

### **Objections to Magistrate Judge Findings and Rulings**

Objections to magistrate judge findings and objections to magistrate judge rulings under Rule 72 may be found in multiple areas of the event lists. User should search carefully for events in multiple categories prior to choosing one for docketing.

### **Filing a Return of Service**

When filing a return of service, the user will enter the date of service and the system will automatically calculate the answer date. The user should verify that the date is correct according to the deadlines set in the Federal Rules of Civil Procedures. Particular attention should be paid to the deadline when the party served was the United States or an agency or actor on behalf of the United States.

# Chapter 6 Query

**Note: Beginning with Version 3.1 of CM/ECF, the Blue Menu Bar provides options to continue to use the static menu selections or the cascading menu options to navigate from one function to another more easily. These examples continue to show the static approach. See Appendix 3 to learn more about cascading menus.**

Registered users should use this feature to query the Electronic Case Files (ECF) system for specific case information. 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 ECF permits you to query the database.

**Note: Your PACER login and password is 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 \$.08 per page to access documents, docket sheets, etc. from ECF.**

**Frame 6-1 Query entry screen**

Query entry screen

Query has 3 search options.

1. Case number query
2. Select Open, Closed, or all case statuses, Date filed, Date entered along with Nature of Suit options
3. Select Open, Closed, or all case statuses, name search of party or attorney.

<p><b>Frame 6-1a Case Number Search</b></p> <p><b>Query</b></p> <p><b>Search Clues</b></p> <p>Case Number <input type="text" value="2"/> <input type="button" value="Find This Case"/></p> <p><b>or search by</b></p> <p>Case Status: <input type="radio"/> Open <input type="radio"/> Closed <input type="radio"/> All</p> <p>Filed Date <input type="text"/> to <input type="text"/></p> <p>Last Entry Date <input type="text"/> to <input type="text"/></p> <p>Nature of Suit <input type="text" value="0 (zero)"/> 110 (Insurance) 120 (Contract: Marine)</p> <p><b>or search by</b></p> <p>Case Status: <input type="radio"/> Open <input type="radio"/> Closed <input type="radio"/> All</p> <p>Last/Business Name <input type="text"/> (Examples: Desoto, Des*t)</p> <p>First Name <input type="text"/> Middle Name <input type="text"/></p> <p>Type <input type="text"/> Prisoner ID <input type="text"/></p> <p><input type="button" value="Run Query"/> <input type="button" value="Clear"/></p>	<p>Case Number Search</p> <p>If you use the case number query, the <input type="button" value="Run Query"/> is grayed out.</p> <p><b>Note:</b> The "Run Query" button is grayed out which indicates the button is not functional until a valid case is entered.</p> <ul style="list-style-type: none"><li>• Once you begin to enter a case number, the <input type="button" value="Find This Case"/> button is displayed. After entering the entire case click on the <input type="button" value="Find This Case"/> button.</li><li>•</li></ul>
<p><b>Frame 6-1b Duplicate Case Numbers</b></p> <p><b>Query</b></p> <p><b>Search Clues</b></p> <p>Case Number <input type="text" value="2-12"/> <input <="" p="" type="button" value="Looking up case number 2-12..."/><p><b>or search by</b></p><p>Case Status: <input type="radio"/> Open <input type="radio"/> Closed <input type="radio"/> All</p><p>Filed Date <input type="text"/> to <input type="text"/></p><p>Last Entry Date <input type="text"/> to <input type="text"/></p><p>Nature of Suit <input type="text" value="0 (zero)"/> 110 (Insurance) 120 (Contract: Marine)</p><p><b>or search by</b></p></p>	<p>Duplicate Case Numbers</p> <ul style="list-style-type: none"><li>• After clicking on the <input type="button" value="Find This Case"/> button, a "Looking up case number 2-1..." Message is displayed as CM/ECF is verifying the case number in the database.</li><li>• If you do not specify the case type (i.e. cv, mc, cr, etc.), there could be duplicate case numbers.</li><li>• If duplicate case numbers are found, they will be displayed in a list. You will need to check the checkbox for the case you want to query.</li></ul>
<p><b>Frame 6-1c</b></p> <p><b>Query</b></p> <p><b>Search Clues</b></p> <p>Case Number <input type="text" value="2-12"/> <input type="button" value="Hide Case List"/></p> <p>Select a case:</p> <ul style="list-style-type: none"><li><input type="checkbox"/> 1:02-cr-00012-LTB USA v. James et al <input type="button" value="+"/> <input type="checkbox"/></li><li><input type="checkbox"/> 1:02-cv-00012 Smith v. Smith</li><li><input type="checkbox"/> 1:02-mj-00012-BNB USA v. James et al <input type="button" value="+"/> <input type="checkbox"/></li></ul> <p><b>or search by</b></p>	<ul style="list-style-type: none"><li>• For <b>criminal cases</b>, you can further drill down to specific defendants in a criminal case.</li><li>• Notice the <input type="button" value="+"/> next to the case number for a criminal case. It means that there are multiple defendants in the criminal case and you can click on the <input type="button" value="+"/> to expand the list of available cases.</li></ul>

<p><b>Frame 6-1d Duplicate Case Numbers</b></p> <p><b>Query</b></p> <p><b>Search Clues</b></p> <p>Case Number <input type="text" value="2-12"/> <input type="button" value="Hide Case List"/></p> <p>Select a case:</p> <ul style="list-style-type: none"><li><input type="checkbox"/> 1:02-cr-00012-LTB USA v. James et al</li><li><input type="checkbox"/> 1:02-cr-00012-LTB-1 Robert E. James</li><li><input type="checkbox"/> 1:02-cr-00012-LTB-2 Catherine E. Bell</li><li><input checked="" type="checkbox"/> 1:02-cv-00012 Smith v. Smith</li><li><input type="checkbox"/> 1:02-mj-00012-BNB USA v. James et al</li></ul> <p style="text-align: center;"><b>or search by</b></p> <p>Case Status: <input type="radio"/> Open <input type="radio"/> Closed <input type="radio"/> All</p> <p>Filed Date <input type="text"/> to <input type="text"/></p> <p>Last Entry Date <input type="text"/> to <input type="text"/></p> <p>Nature of Suit <input type="text" value="0 (zero)"/> 110 (Insurance) 120 (Contract: Marine)</p> <p style="text-align: center;"><b>or search by</b></p> <p>Case Status: <input type="radio"/> Open <input type="radio"/> Closed <input type="radio"/> All</p> <p>Last/Business Name <input type="text"/> (Examples: Desoto, Des*t)</p> <p>First Name <input type="text"/> Middle Name <input type="text"/></p> <p>Type <input type="text"/> Prisoner ID <input type="text"/></p> <p><input type="button" value="Run Query"/> <input type="button" value="Clear"/></p>	<p>Duplicate Case Numbers</p> <ul style="list-style-type: none"><li>• Once the list has been expanded, you can click on a specific defendant, or the main case, which would be for <b>all defendants</b> in the criminal case.</li><li>• There's also a civil case with the same number, 02-12. If the civil case is the one you want to query, click on the check box for the civil case.</li></ul>
<p><b>Frame 6-1e Case Number Query</b></p> <p><b>Query</b></p> <p><b>Search Clues</b></p> <p>Case Number <input type="text" value="1:02-cr-12"/> <input type="button" value="Hide Case List"/></p> <p>Select a case:</p> <ul style="list-style-type: none"><li><input checked="" type="checkbox"/> 1:02-cr-00012-LTB USA v. James et al</li><li><input type="checkbox"/> 1:02-cr-00012-LTB-1 Robert E. James</li><li><input type="checkbox"/> 1:02-cr-00012-LTB-2 Catherine E. Bell</li><li><input type="checkbox"/> 1:02-cv-00012 Smith v. Smith</li><li><input type="checkbox"/> 1:02-mj-00012-BNB USA v. James et al</li></ul>	<ul style="list-style-type: none"><li>• When you click on the "entire case" checkbox, the others in the list are grayed out, so you cannot click on those other cases.</li><li>• If you clicked on a checkbox in error, you must uncheck the checked checkbox and then check the correct checkbox.</li></ul>

**Frame 6-2 Running the Case Number Query**

**Query**

**Search Clues**

Case Number

Select a case:

- 1:02-cr-00012-LTB USA v. James et al
- 1:02-cr-00012-LTB-1 Robert E. James
- 1:02-cr-00012-LTB-2 Catherine E. Bell
- 1:02-cv-00012-Smith v. Smith
- 1:02-mj-00012-BNB USA v. James et al
- 1:02-mj-00012-BNB-1 Robert E. James (merged)
- 1:02-mj-00012-BNB-2 Catherine E. Bell (merged)

**or search by**

Case Status:  Open  Closed  All

Filed Date  to

Last Entry Date  to

Nature of Suit   
110 (Insurance)  
120 (Contract: Marine)

**or search by**

Case Status:  Open  Closed  All

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

First Name  Middle Name

Type

- When you click on a specific defendant in a criminal case, the other defendants' case checkbox (es) and the "entire case" checkbox for that criminal case are not grayed out. This allows you to check other defendants in the case or check the "entire case" checkbox.
  
- After you click on the case(s) you want from the list, the  button is darkened so you can click on the  button to perform the case number query.

### Frame 6-3 Case Number Query Options

At the top of the window, ECF displays the case number, short-style, presiding judge, date that the initial pleading was filed and the date of the last filing for the case.

**ECF** Civil • Criminal • Query • Reports •

**1:06-cv-01000** Rabitt v. Fudd  
**Date filed:** 07/11/2006 **Date of last filing:** 08/09/2006

**Query**

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

**Alias** - The alias option displays information, when applicable, containing other names by which a person is known.

**Associate Cases** - The associated case option contains information on consolidated cases and other associated court information.

**Attorney** - The attorney option displays attorney information for each of the parties in the case.

**Case File location** - The case file location option provides information as to where a case file is located.

**Case Summary** - The case summary option provides an overview of current case-specific information.

**Deadlines/Hearings** - The deadline/hearings option produces a screen that allows you to query the database by various means to obtain hearing and other scheduled deadlines.

**Docket Report** - The docket report option produces a screen that allows you to compile information on a specific case. You may select a date range for your docket report as well as a range of document numbers. If you leave range fields blank, the system will default to displaying the entire docket report. Place a checkmark in the box to “**Include links to Notice of Electronic Filing**” if you wish to view them from the docket sheet. After you have selected the parameters for your report, click on the **[Run Report]** button. ECF will run your customized docket report and display it in a window.

**Filers** - The filers option displays a list of parties, their role, and when they were added to the case. To view documents filed by a particular filer, click on the appropriate hyperlinked party name.

**History/Documents** - The history/documents option queries the database for case event history and documents associated with the case. After you click on the **History/Documents** hyperlink, ECF opens a run query screen. You may select the sort order for the query report and choose to exhibit all events or only those with documents attached. ECF also offers you the option to display the docket text in the report.

**Party** - The party option displays a list of the case participants and the attorneys associated with them.

**Related Transactions** - The related transactions option shows documents related to each other.

**Status** - The court does not use this option.

**View a Document** - Allows the user to view a specific document without needing to view a docket sheet. The user must know the document number to use this option



**Frame 6-4 Name Search**

Case Status:  Open  Closed  All

Last Name  (Examples: Desoto, Des\*t)

First Name  Middle Name

Type

---

Case Status:  Open  Closed  All

Last Name  (Examples: Desoto, Des\*t)

First Name  Middle Name

Type

File Edit View Favorites Tools Help Address <https://ecf-train.cod.uscourts.gov/cgi-bin/login.pl?6117954803>

**ECF** Civil • Criminal • Query • Reports • Utilities

**Select A Case**

This person is a party in 2 cases.

[1:05-cv-00111-EWN](#) Dizzyland Enterprises v. Mouse filed 02/24/05

[1:05-cv-00124-EWN](#) Duck v. Porky's BBQ filed 02/01/05

Name Search

- You may query the ECF database by the name of a party or an attorney.
- Enter the last name of the person in the appropriate field
- If the individual is a party to more than one case, ECF will open a screen listing all of the associated cases.
- If you click on the case number hyperlink, ECF will open the query screen depicted in

**Frame 6-5 Date filed – Date entered along with Nature of Suit**

Case Status:  Open  Closed  All

Filed Date  to

Last Entry Date  to

Nature of Suit 

- 110 (Insurance)
- 120 (Contract: Marine)

---

Case Status:  Open  Closed  All

Filed Date  to

Last Entry Date  to

Nature of Suit 

- 110 (Insurance)
- 120 (Contract: Marine)

**ECF** Civil • Criminal • Query • Reports • Utilities

**Select A Case**

[1:05-y-03000-EWN](#) Sinister v. USA filed 08/05/05

[1:05-y-03000-EWN-1](#) filed 08/05/05

Date filed – Date entered along with Nature of Suit

- This query allows you to enter a date filed or date entered for a document.
- Additionally, you can also select Nature of Suit codes as part of this query search.
- In this example, we enter a date range of cases filed.
- The query returns a list of cases filed within the date range we specified.
- If you click on the case number hyperlink, ECF will open the query screen depicted in

## Chapter 7 Reports

**Note:** Beginning with Version 3.1 of CM/ECF, the Blue Menu Bar provides options to continue to use the static menu selections or the cascading menu options to navigate from one function to another more easily. These examples continue to show the static approach. See Appendix 3 to learn more about cascading menus.

Frame 7-1 The Report options



The Report options

- The Reports feature of ECF provides the user with several report options.
- After selecting the **Reports** feature from the **Blue** menu bar, ECF opens the **Reports** screen.

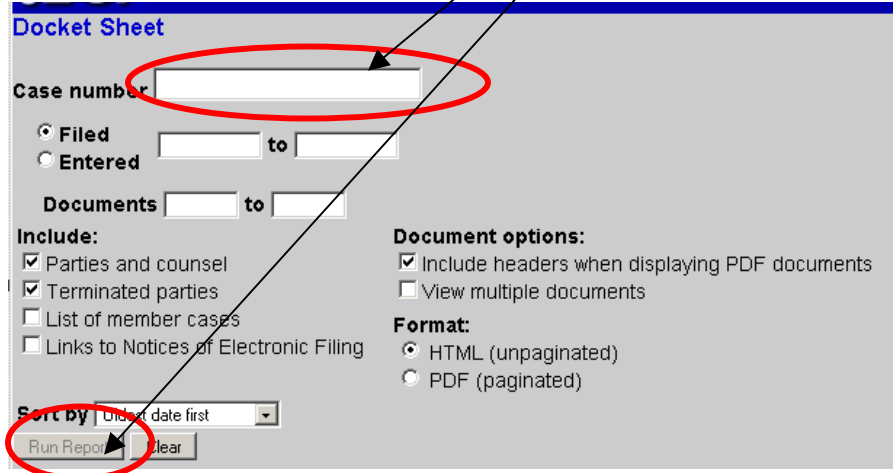
Frame 7-2

**Note:** If you select Docket Sheet, Civil Cases, Judgment Index, Criminal Cases, or Docket Activity from the main menu, ECF will prompt you to enter your PACER login and password. You will be charged the applicable PACER charges. You may view Calendar Events, Written Opinions, Civil Events (atty), and Criminal Events (atty) without charge and without logging into PACER.

Frame 7-2a

**Note:** These examples below do not display all of the possible screens that can be encountered when a **case number** is being entered for the sake of brevity. Review Frames 6-1 through 6-2 for more detail as to what can be seen for errors, duplicate case numbers, etc. Also remember that the “action” button (i.e. Run Report, Run Query, etc.) button is grayed out until a valid case number is entered.

Frame 7-3 The Docket sheet



The Docket sheet

- If you have not already logged in with your PACER information, ECF opens the PACER login screen. Enter your PACER login and password. Click on the **[Login]** button
- The Docket Sheet report is the same as a **Docket Report** from the **Query** menu option discussed in Chapter 6 (Query.)

**Frame 7-3 The Docket sheet**

Filed  to

Entered

Documents  to

**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

**Format:**

HTML (unpaginated)

PDF (paginated)

Sort by

- If you do not need a **complete** docket sheet, you can narrow the size by entering a specified date range or enter a document number range before you run the report.

<p><b>Include</b> Checkbox items:</p> <ul style="list-style-type: none"> <li>• <b>Parties and counsel</b> - all parties and related counsel will be listed.</li> <li>• <b>Terminated parties</b> – will be listed and shown with a (T) and the word <b>Terminated</b> next to the party name.</li> <li>• <b>List of Member cases</b> – will list associated member cases on the report.</li> <li>• <b>Links to Notices of Electronic Filing</b> – will display a “silver ball” next to the document number. The “silver ball” is a link to the NEF.</li> </ul>	<p><b>Document options</b> checkbox items:</p> <ul style="list-style-type: none"> <li>• <b>Include headers when displaying PDF documents</b> – will display a “pdf header” on the PDF document which shows <b>case number, document number, date filed, and page x of y</b> of the document filed.</li> <li>• <b>View multiple documents</b> – will display checkboxes on the docket report to facilitate the ability to select and view multiple documents at once. Will also allow you to print the multiple document(s). The user will also be able to download the multiple documents to a <b>.zip</b> file at one time. <b>See Frames 7-xx through Frame 7-yy to see examples.</b></li> </ul>
<p><b>Sort by</b> selections</p> <ul style="list-style-type: none"> <li>• <b>Oldest Date first</b> – will list the docket entries by the oldest date first to the latest (most recent) date.</li> <li>• <b>Most Recent Date first</b> – will list the docket entries by the most recent date first to the oldest date.</li> </ul>	<p><b>Format:</b></p> <ul style="list-style-type: none"> <li>• <b>HTML (Hyper Text Markup Language)</b> - will display the Docket Report in a web-based HTML format and is unpaginated.</li> <li>• <b>PDF (Portable Document Format)</b> – will create a PDF document of the Docket Report and display it paginated.</li> </ul>

**Frame 7-3a**

**Docket Sheet**

Case number

Filed  to

Entered

Documents  to

**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

**Format:**

HTML (unpaginated)

PDF (paginated)

Sort by

- Enter the case number in the “**Case Number**” field.
- Click on the  button.
- Once the case number is found, the  button is darkened and you can click on it to run the docket report.

**Frame 7-3b**  
**Docket Sheet**

Case number:

Select a case:

- 1:02-cr-00012-LTB USA v. James et al
- 1:02-cv-00012 Smith v. Smith
- 1:02-mj-00012-BNB USA v. James et al

Filed  to

Entered

Documents  to

**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

**Format:**

- HTML (unpaginated)
- PDF (paginated)

Sort by:

- Enter/select docket sheet display options before you click on the  button.
  - Enter filed/entered date range (optional)
  - Enter document range (optional)
  - Select items to include in the docket report display (see **Frame 7-3** for details of the selectable items)
- Click on the **[Run Report]** button.

**Frame 7-3c Sample Docket Sheet (HTML – (Unpaginated) format)**

U. S. District Court [TEST]  
District of Colorado [TEST] (Denver)  
CIVIL DOCKET FOR CASE #: 1:02-cv-00012

Smith v. Smith  
Assigned to:  
Cause: 05:704 Labor Litigation

Date Filed: 06/05/2007  
Jury Demand: Defendant  
Nature of Suit: 445 Civil Rights: Americans with Disabilities - Employment  
Jurisdiction: Diversity

**Plaintiff**  
**Jane Smith**

represented by **Jackbert Yeebert**  
1 Alley Way  
Denver, CO 80294  
Email: jack\_yee@cob.uscourts.gov  
*LEAD ATTORNEY*  
*ATTORNEY TO BE NOTICED*

V.

**Defendant**  
**Oliver Smith**

represented by **Chris Vagner**  
Vagner and Yee  
1234 N. 20th Street  
Denver, CO 80294  
303-335-2009  
Fax: 303-335-2040  
*LEAD ATTORNEY*  
*ATTORNEY TO BE NOTICED*

**Attorney Yee**  
1901 19th St.  
Denver, CO 80294  
Email: jack\_yee@cod.uscourts.gov  
*ATTORNEY TO BE NOTICED*

Date Filed	#	Docket Text
06/05/2007	<a href="#">1</a>	COMPLAINT against Oliver Smith ( Filing fee \$ 350, Receipt Number 12345) Summons Issued, filed by Jane Smith.(Yee, ) (Entered: 06/05/2007)
06/08/2007	<a href="#">2</a>	ANSWER to Complaint by Oliver Smith.(Yee, Attorney) (Entered: 06/08/2007)
06/08/2007	<a href="#">3</a>	Amended MOTION for Protective Order from interrogatories by Defendant Oliver Smith. (Attachments: # <a href="#">1</a> Proposed Order (PDF Only))(Yee, Attorney) (Entered: 06/08/2007)
06/08/2007	<a href="#">4</a>	BRIEF in Support re <a href="#">3</a> Amended MOTION for Protective Order from interrogatories filed

- Sample Docket Sheet (HTML – (Unpaginated) format)**
- Caption information
  - Party and attorney information
  - Docket entries and links to PDF documents

**Frame 7-4d PDF Copy of the Docket Sheet**  
**Docket Sheet**

Case number: 1:02-cv-12

Filed  to   
 Entered  to

Documents  to

**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

**Format:**  
 HTML (unpaginated)  
 PDF (paginated)

Sort by: Oldest date first

Run Report Clear

- (PDF – (Paginated) format)
- An alternative format of the Docket Report is to select the **PDF (Paginated)** format of the docket sheet before running the report.
  - The **PDF – (Paginated)** selection will create a PDF of the docket sheet and place a header with case number, date, and time the docket sheet was printed.

**Frame 7-4e Sample Docket Sheet - (PDF – (Paginated) format)**

Case: 1:02-cv-12 As of: 06/08/2007 11:11 AM MDT 1 of 1

**U. S. District Court [TEST]  
District of Colorado [TEST] (Denver)  
CIVIL DOCKET FOR CASE #: 1:02-cv-00012**

Smith v. Smith  
Assigned to:  
Cause: 05:704 Labor Litigation

Date Filed: 06/05/2007  
Jury Demand: Defendant  
Nature of Suit: 445 Civil Rights:  
Americans with Disabilities – Employment  
Jurisdiction: Diversity

**Plaintiff**  
Jane Smith

represented by **Jackbert Yeebert**  
1 Alley Way  
Denver, CO 80294  
Email: jack\_yee@cob.uscourts.gov  
**LEAD ATTORNEY**  
**ATTORNEY TO BE NOTICED**

V.

**Defendant**  
Oliver Smith

represented by **Chris Vagner**  
Vagner and Yee  
1254 N. 20th Street  
Denver, CO 80294  
303-335-2009  
Fax: 303-335-2040  
**LEAD ATTORNEY**  
**ATTORNEY TO BE NOTICED**

**Attorney Yee**  
1901 19th St.  
Denver, CO 80294  
Email: jack\_yee@cod.uscourts.gov  
**ATTORNEY TO BE NOTICED**

Date Filed	#	Docket Text
06/05/2007	<a href="#">1</a>	COMPLAINT against Oliver Smith ( Filing fee \$ 350, Receipt Number 12345) Summons Issued, filed by Jane Smith.(Yee, ) (Entered: 06/05/2007)
06/08/2007	<a href="#">2</a>	ANSWER to Complaint by Oliver Smith.(Yee, Attorney) (Entered: 06/08/2007)
06/08/2007	<a href="#">3</a>	Amended MOTION for Protective Order from interrogatories by Defendant Oliver Smith. (Attachments: # <a href="#">1</a> Proposed Order (PDF Only))(Yee, Attorney) (Entered: 06/08/2007)
06/08/2007	<a href="#">4</a>	BRIEF in Support re <a href="#">3</a> Amended MOTION for Protective Order from interrogatories filed by Defendant Oliver Smith. (Attachments: # <a href="#">1</a> Exhibit A#_2 Attachment 1)(Yee, Attorney) (Entered: 06/08/2007)

- Sample Docket Sheet  
(HTML – (Unpaginated) format)
- Case Number, date, time, and number of pages for the Docket Sheet are on a header for the PDF
  - Caption information
  - Party and attorney information
  - Docket entries and links to PDF documents

**Frame 7-4 Civil cases report**

**Frame 7-5**

**Frame 7-6 Sample Civil Cases Report**

Case Number/ Title	Case Dates	Days Pending	Notes
<a href="#">1:02-cv-00012</a> Smith v. Smith	Case filed: 06/05/2007	23	Cause: 05:704 Labor Litigation NOS; 445 Civil Rights; Americans with Disabilities - Employment Office: Denver Jurisdiction: Diversity Presider: Unassigned Jury demand: Defendant

Total number of cases reported: 1

Office	All
Case Type	All
Nature of Suit	All
Cause	All
Jurisdiction	All
Filed Date	6/1/2007 - 6/8/2007
Case Flags	All
Terminal Digits	All
Open Cases	Yes
Closed Cases	No
Sort by	case number

Civil cases report

**Note:** There is not a cap for charges when running the Civil Cases Report

- The [Civil Cases](#) report provides you with the flexibility to query the ECF database to locate cases filed based upon parameters you enter or select.
- The parameters you can enter or select are:
  - Filing date range
  - Cause code
  - Nature of suit
  - Case flag(s)
  - or any combination thereof
- If you have not already logged in with your PACER information, ECF opens the PACER login screen. Enter your PACER login and password. Click on the **[Login]** button
- Enter the range of case filing dates for your report and select any other search criteria you wish to narrow your search. If you enter a date range only, ECF will display all of the cases filed within your date range.
- If you leave all fields blank, ECF will display a report for all cases opened in ECF.
- In this example, we enter a date range for cases filed from 6/1/07 through 6/8/07 and click on the **[Run Report]** button.

Sample Civil cases report

- The report is returned with the cases found.
- There's a link to the docket report from this report.
- At the end, there's a summary of the report selection criteria.

**Note:** Remember, you are billed PACER charges for running this report. However, this may serve as a valuable research tool.

**Frame 7-7 Calendar events report**

**Calendar events report**

This report displays scheduled events.

Selection criteria are:

- by a specific case number
- by specified date range
- by type of calendar event
- by time of day
- print docket text with the Calendar Events Report

• Examples:

- Search for all events scheduled for a specific case by entering the case number and end date in the applicable fields.

- Search for a specific type of hearing in a specific case within a date range by entering the applicable information.

- If you checked the box to "Include docket text", the docket text will be shown on the Calendar Events Report. There will be a "silver ball" next to the docket text. The "silver ball" is a hyperlink to the actual docket entry creating the scheduled event.

- After entering your criteria, click on **[Run Report]**. A compiled report is displayed

**Frame 7-8 Sample Calendar events report – with docket text**

**Frame 7-8a Sample Calendar events report – without docket text**

- If you un-checked the box to "Include docket text", the docket text **not** will be shown on the Calendar Events Report.

- The report displays more entries, as the docket text is not displayed.

- Additionally, the "silver ball" (hyperlink) to the actual entry creating the schedule is not displayed.



**Frame 7-9**

**Note:** The calendar events report is not the official calendar of the court. Users should consult the court's Internet website for official calendars.

**Frame 7-10 Docket Activity Report (TWO VERSIONS)**

**Version 1 - Docket activity with an attorney logged onto ECF and selecting the Docket Activity Report**

**Warning:** This report is not subject to the 30 page billing cap. You will be billed for the total number of pages. If you want to run a report for a single case, you can use the Query Menu or the Docket Report.

**Docket Activity Report PUBLIC ACCESS**

Case number:

Office: Colorado Springs / Denver

Event category: EXTEND, admapp, answer

Case type: Bankruptcy judgments, Civil

Case flags: CLOSED, MDL

Filed between: 8/13/2006 and 8/14/2006

Sort by: Case Number

Only cases to which I am linked

Open cases

Closed cases

Summary text

Full docket text

**Version 2 - Docket activity with an attorney/user just logging on with a PACER account and selecting the Docket Activity Report**

**Warning:** This report is not subject to the 30 page billing cap. You will be billed for the total number of pages. If you want to run a report for a single case, you can use the Query Menu or the Docket Report.

**Docket Activity Report PUBLIC ACCESS**

Case number:

Office: Colorado Springs / Denver

Event category: EXTEND, admapp, answer

Case type: Bankruptcy judgments, Civil

Case flags: CLOSED, MDL

Filed between: 8/13/2006 and 8/14/2006

Sort by: Case Number

Only cases to which I am linked

Open cases

Closed cases

Summary text

Full docket text

- If you have not already logged in with your PACER information, ECF opens the PACER login screen. Enter you PACER login and password. Click on the **[Login]** button
- Enter the range of case filing dates for your report and select any other search criteria you wish to narrow your search. If you enter a date range only, ECF will display all of the cases filed within your date range.
- If you leave all fields blank, ECF will display a report for all cases opened in ECF.

In this example, we enter a date range for cases filed from 8/1/05 through 8/5/05 and click on the **[Run Report]** button

The Docket Activity Report

- The **Docket Activity** report provides you with the flexibility to query the ECF database to view docket entry activity by **specific case** meeting selectable criteria, or by selectable criteria that may display numerous cases meeting the selection criteria. The selectable criteria for the **Docket Activity report** include:
  - Open and/or Closed cases
  - Office
  - Case type
  - Event Category (i.e. motion, answer, complaint, etc.)
  - Case flag(s)
  - Date range of activity filed
  - Summary or full Docket text

**Note 1:** There is not a cap for charges when running the Criminal Cases Report

**Note 2:** If you logged onto to ECF and then to PACER to run the **Docket Activity Report**, you will see a **Check Box**  **Only cases to which I am linked** with the box **pre-checked** to indicate that you want to see only cases that meet the selection criteria **and** where the attorney is linked to. You may un-check the box if you want to see all cases meeting the selection criteria.

**Note 3:** If you logged on **just** with your **PACER account**, and run the **Docket Activity Report**, you notice the  **Only cases to which I am linked** is not present. Since you logged on just with PACER, ECF knows the PACER account is not tied to a specific attorney so it will not display the check box.



**Frame 7-11 Sample docket Activity Report**

**Docket Activity Report**  
U. S. District Court [TEST] -- District of Colorado [TEST]  
Report Filed Period: 1/1/2006 - 8/14/2006

Case Number/Title	Dates	Category/Event	Docketed by	Notes
<a href="#">1:06-cr-00001-PSF</a> <a href="#">USA v. Jones</a>	Entered:04/28/2006 15:22:22 Filed:04/28/2006	Category:charge-cr Event:Indictment Document:1	ldt Type:ct	Office:Denver Presider:Phillip S. Figa
INDICTMENT as to Felicity Jones (1) count(s) 1. (ldt. )				
<a href="#">1:06-cr-00601-REB</a> <a href="#">USA v. Schmucker</a>	Entered:05/03/2006 10:53:24 Filed:05/03/2006	Category:charge-cr Event:Indictment Document:1	ldt Type:ct	Office:Denver Presider:Robert E. Blackburn
INDICTMENT as to Eric Schmucker (1) count(s) 1. (ldt. )				
<a href="#">1:06-cr-00602-WYD</a> <a href="#">USA v. Schmucker</a>	Entered:05/03/2006 11:13:15 Filed:05/03/2006	Category:charge-cr Event:Indictment Document:1	ldt Type:ct	Office:Denver Presider:Wiley Y. Daniel

**Selection Criteria for Report**

Case number	All
Filed Date	1/1/2006 - 8/14/2006
Entered Date	All
Office	All
Nature of Suit	All
Cause	All
Case type	cr
Case flags	All
Open Cases	No
Closed Cases	No
Event Category	charge-cr
Docket Text	full
Sort by	case number
<b>Total Number of Docket Entries: 5</b>	

The **Docket Activity Report** is displayed based upon the date and selection criteria you entered/selected.

- The **Case number/title** is listed as a link to the docket sheet,
- =
- The **date** is displayed as it fell within the date range,
- The **Category/Event** is displayed
- The **Docketed by** column shows who docketed the event
- Finally, a **Notes** column is displayed showing miscellaneous information such as office, presiding judge, flags, etc.

At the end of the **Docket Activity Report**, a summary of the selection criteria is displayed to indicate what parameters were used to select the report data.

**Frame 7-12 Criminal cases report**

- If you have not already logged in with your PACER information, ECF opens the PACER login screen. Enter your PACER login and password. Click on the **[Login]** button
- Enter the range of case filing dates for your report and select any other search criteria you wish to narrow your search. If you enter a date range only, ECF will display all of the cases filed within your date range.
- If you leave all fields blank, ECF will display a report for all cases opened in ECF.

In this example, we enter a date range for cases filed from 8/1/05 through 8/5/05 and click on the **[Run Report]** button.

**Frame 7-13 Sample Criminal cases report**

Case Number/ Title	Date Filed/ Reopened/ Added	Date Closed/ Reclosed	Days Pending	Notes
<a href="#">105-r-03000-EWN</a> Sinister v. USA	Filed: 08/05/2005		40	Office: Denver
<a href="#">1 USA</a>	Added:08/05/2005			Presider: Edward W Nottingham

Total Number of Cases Reported: 1

Criminal Cases Report Selection Criteria	
Judges	
Offices	All
Case types	All
Case flags	All
Filed Between :	8/1/2005 - 8/10/2005
Include Defendants that are:	Pending Non-Fugitives
Sort by:	Case number

**Criminal cases report**

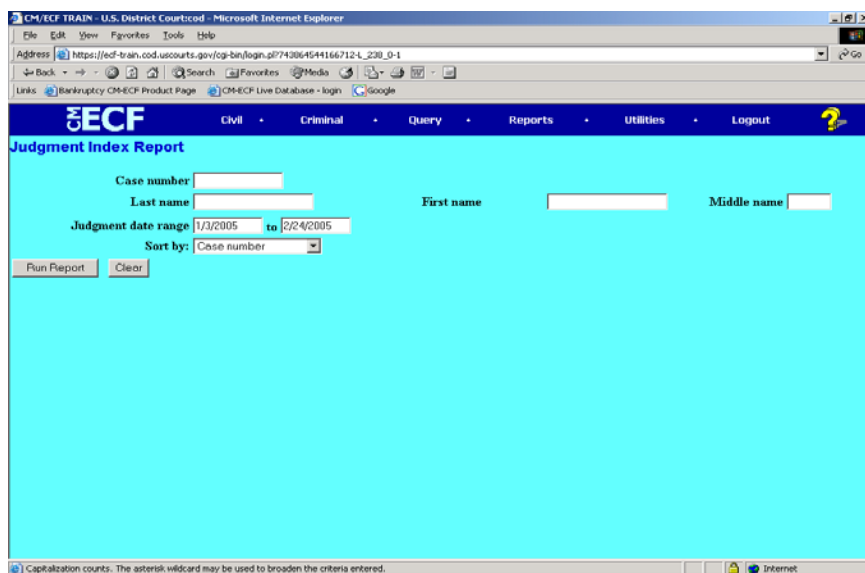
- The **Criminal Cases** report provides you with the flexibility to query the ECF database to locate cases filed based upon parameters you enter or select.
- The parameters you can enter or select are:
  - Filing date range
  - Citation code
  - Citation status (pending or terminated)
  - Office
  - Case type
  - Defendant status
  - Case flag(s)
  - or any combination thereof

**Note:** There is not a cap for charges when running the Criminal Cases Report

**Sample Criminal cases report**

- The report is returned with the cases found.
- There's a link to the docket sheet from this report.
- At the end, there's a summary of the report selection criteria.
- Remember, you are billed PACER charges for running this report. However, this may serve as a valuable research tool.

**Frame 7-14 Judgment index report**



Judgment index report

- This report displays information about selected judgments.
- The [Judgment Index Report](#) provides you with the flexibility to query the ECF database to obtain judgment information by:
  - Case number
  - Party name
  - Date range
  - or any combination thereof
- After entering the selection criteria you wish to search, click on the **[Run Report]** button.

**Frame 7-15 Sample Judgment index report**

Case Number	Case Description	Payment Status
1:01-cv-00001-EWN-OES	Colorado, State of v. Sunoco, Inc., et al <i>In favor of:</i> A.O. Smith Corporation <i>Against:</i> Colorado, State of <i>Amount:</i> \$ 0.00 DB A.O Smith Corporation's Motion for Sum Jgmn on the Merits is Granted. The civil action and complaint are dismissed with prejudice. DB A.O Smith Corporation shall have its costs upon the proper filing of a Bill of Costs within 10 days. <i>Date:</i> 05/24/2005 <i>Document:</i> 223 <i>Interest:</i> 0.00% <i>Court Cost:</i> \$ 0.00	No Payment 05/24/2005
1:01-cv-00694-REB-BNE	Pratt v. Tedesco <i>In favor of:</i> Walter Pratt <i>Against:</i> Peter Tedesco <i>Amount:</i> \$ 315000.00 <i>Date:</i> 03/09/2005 <i>Document:</i> 245 <i>Interest:</i> 0.00% <i>Court Cost:</i> \$ 0.00	Fully Satisfied 03/09/2005
1:01-cv-00777-REB-CBS	Cunningham, et al v. BHP Pet UK, Corp <i>In favor of:</i> BHP Petroleum (UK) Corporation <i>Against:</i> John Bonneville <i>Amount:</i> \$ 0.00 Amended Supplemental Judgment in favor of Defendants and against Plaintiffs <i>Date:</i> 07/11/2005 <i>Document:</i> 55 <i>Interest:</i> 0.00% <i>Court Cost:</i> \$ 0.00	No Payment 07/11/2005

Sample Judgment index report

- The report is returned with the judgments found.
- There's a link to the docket sheet from this report
- Remember, you are billed PACER charges for running this report. However, this may serve as a valuable research tool.

**Frame 7-16 Written opinions report**

**Written Opinions Report**

Case Number:

Last Name:  First Name:  Middle Name:

Office:  (Denver, Durango)

Nature of Suit:  (0 (zero), 110 (Insurance))

Case Type:  (Bankruptcy judgments, Civil)

Cause:  (\*41\* (), 0 (No cause code entered))

Case Flags:  (2255, ADMAPP)

Filed between: 8/15/2005 and 9/14/2005

Summary text  
 Full docket text

Sort by:  (Case Number)

Run Report Clear

Written opinions report

- This report displays written opinions issued by judges.
- The [Written Opinions Report](#) provides you with the flexibility to query the ECF database to obtain written opinion information by:
  - Case number
  - Party name
  - Office
  - Nature of Suit code
  - Case Type
  - Cause codes
  - Case Flags
  - Date range
  - or any combination thereof
- After entering the selection criteria you wish to search, click on the **[Run Report]** button

**Frame 7-17 Sample Written opinions report**

Case Number & Name:	Date Filed:	Doc. #	Description:	Notes:
<a href="#">189-cv-00732-JLK-CBS-Sand Creek Partners v. Premier Financial, et al</a>	08/19/2005	145	ORDER granting 144 MOTION to Withdraw Lisa E. Frankel and to Substitute Appearance of R. William Rowe as counsel for Interested Party Cadle Company, The. Signed by Judge John L. Kane on 8/19/05. (dlb.)	Office: Denver Case Flags: Case Terminated, Suppress case from Service and Answer Report NOS: Contract Other Cause: 28.1331 Fed. Question: Breach of Contract
<a href="#">190-cv-00181-JLK Cook, et al v. Rockwell Intl Corp.</a>	08/17/2005	1422	ORDER regarding Telephonic Status Conference set for 8/22/2005 09:00 AM before Judge John L. Kane by Judge John L. Kane on 8/17/05. (dlb.)	Office: Denver Case Flags: Class Action, Suppress case from Service and Answer Report NOS: Economic Stabilization Act Cause: 33.1365 Environmental Matters
<a href="#">192-cv-00870-EWN-OES Montes, et al v. Romer, et al</a>	08/18/2005	1032	ORDER granting 992 EIGHTH APPLICATION for Payment of Fees and Costs by Special Masters Richard M. Borchers and Bruce D. Pringle. Signed by Judge John L. Kane on 8/18/05. (pap.)	Office: Denver Case Flags: Case Terminated, Class Action, Lead Case, Mag Rec Pending, Non Dispositive Motion, Suppress case from

Sample Written opinions report

- The report is returned with the written opinions found.
- There's a link to the docket sheet and the document from this report
- This report is provided at no charge to the customer.

**Frame 7-18 Sample Civil and/or Criminal events report**

**Sample Civil events report for attorneys**

CM/ECF CIVIL EVENT LIST FOR ATTORNEYS	
INITIAL PLEADINGS AND SERVICE	
Complaints and Other Initiating Documents	Service of Process
Amended Complaint	Affidavit/Return of Service
Counterclaim	Certificate of Service
Crossclaim	Service by Publication
Intervenor Complaint	Summons Returned Executed
Third Party Complaint	Summons Returned Executed as to USA
	Summons Returned Unexecuted
	Waiver of Service Executed
	Writ of Habeas Corpus ad Prosequendum Executed
	Writ of Habeas Corpus ad Prosequendum Unexecuted
	Writ of Habeas Corpus ad Testificandum Executed
	Writ of Habeas Corpus ad Testificandum Unexecuted
Answers to Complaints, Counterclaims and Crossclaims	Other Answers
Answer to Amended Complaint	Amended Answer to Complaint
Answer to Complaint	Answer to Writ of Garnishment
Answer to Counterclaim	Claim
Answer to Crossclaim	Objection to Appeal of Magistrate Judge Decision
Answer to Intervenor Complaint	Objection to Report and Recommendations

Sample Civil and/or Criminal events report

**Sample Civil events report for attorneys**

- The report is returned with the events available to attorneys filing in **civil cases**.
- This report feature will provide the most current and accurate list of events for attorneys.
- You can use the **[Ctrl-F]** or **Find** option to search for word(s) to locate the event you wish to use.
- This report is provided at no charge to the customer.

**Sample Criminal events report for attorneys**

CM/ECF CRIMINAL EVENT LIST FOR ATTORNEYS		
MOTIONS AND RELATED FILINGS		
Motions		
404(b) Evidence	Disqualify Juror	Proceed In Forma Pauperis
5K1.1 Departure	Early Termination of Probation	Produce
Acquittal	Exclude	Protective Order
Alter Judgment	Excuse	Psychiatric Exam
Amend/Correct	Expedite	Psychiatric Treatment
Appeal In Forma Pauperis	Expert	Quash
Appear	Extension of Time to File Document	Quash Indictment/Information
Appoint CJA Counsel	Extension of Time to File Response/Reply	Reassign Case
Appoint Counsel	Extension of Time to Indict	Reconsideration
Appoint Expert	File Amicus Brief	Recusal
Appoint FPD	File Excess Pages	Reduce Sentence
Attorney Fees	Forfeiture of Property	Release Bond Obligation
Bifurcate	Franks Hearing	Release from Custody
Bill of Particulars	Handwriting Exemplars	Release of Funds
Bond	Hearing	Remand
Bond Forfeiture	In Limine	Remand to State Court
Brady Materials	Inspect	Remission
Case Terminated	Interim Payment	Return of Property/PostTrial

**Sample Criminal events report for attorneys**

- The report is returned with the events available to attorneys filing in **criminal cases**.
- This report feature will provide the most current and accurate list of events for attorneys.
- You can use the **[Ctrl-F]** or **Find** option to search for word(s) to locate the event you wish to use.
- This report is provided at no charge to the customer.

## Chapter 8 Utilities

The **Utilities** option provides a number of ECF and PACER related features. **The PACER related items are available but will not be described or illustrated in this manual.** The focus of this chapter is to illustrate the following ECF related features:

- Maintain Your E-Mail (Add/Delete/Modify email addresses)
- Maintain Your Login/Password
- View your Transaction Log
- Mailings

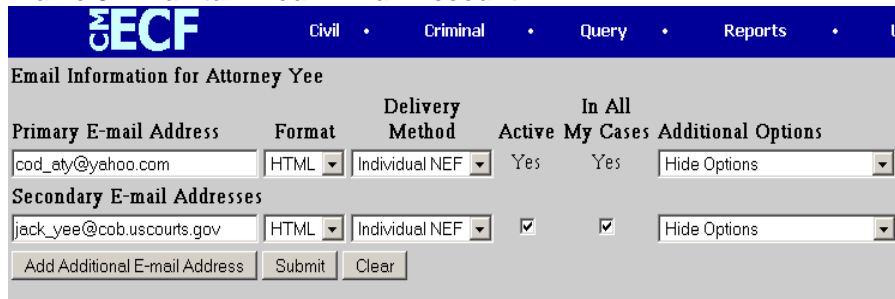
**Frame 8-1 The Utilities Menu**



The Utilities Menu

- The ECF utility options we'll illustrate are:
- Maintain Your E-Mail (Add/Delete/Modify e-mail addresses)
- Maintain Your Login/Password
- View Your Transaction Log (view activity under this ECF login)
- Mailings (Easily find how parties will be served for a given case)

**Frame 8-2 Maintain Your E-Mail Account**



Maintain Your E-mail

- When you click on the [Maintain Your E-mail](#) link, the e-mail information screen is displayed.
- The **e-mail address, format, delivery method, active check box, In all of my cases check box, and Additional Options** are displayed for the primary and any secondary e-mail address set for the attorney.
- From this screen, you can delete, modify, and add e-mail addresses.
- There are numerous options and possibilities that can be set by each **specific e-mail address.**

E-Mail Address	Format of Notice	Type of Delivery	Active Check Box	In All My Cases check box	Other Options
Primary e-mail address is the one displayed on the docket sheet for the attorney	HTML or TEXT	Individual NEFs or A Daily Summary	Check box to activate the e-mail address	Check box to send NEFs to the e-mail recipient in all of the cases for the attorney	Options: 1. Add additional case numbers to receive NEFs. 2. Create list of case exceptions for NEF delivery

**Frame 8-3 E-mail Options, Rules, and Options**

- When you click on the “Active” check box, the NEF options are displayed.
- Select/check the options you want for the **specific** e-mail address.

E-mail Address	Format	Delivery Method	Active?	In All My Cases?	Additional Options
Each e-mail address tied to the attorney account will be displayed.	<ul style="list-style-type: none"> <li>HTML</li> <li>Text</li> </ul>	<ul style="list-style-type: none"> <li>Individual NEF</li> <li>Summary NEF</li> </ul>			

- ECF has the ability to send NEFs to users for cases they may not be a party to.
- You must check the “Send notices in these additional cases” box and enter a case number in the entry box.
  - **Users should be careful in using this option. You are listed as getting official notice for the case(s) entered here. Judges will see your e-mail address listed in the NEF.**
  - The “html format for Netscape or ISP e-mail service” is the default selection. Unless you know that you have an older e-mail application, you should leave the default selected.

When all of the changes have been made on this screen, click on the **[Submit]** button

**Frame 8-3 The Primary E-mail Address - The Rules**

Primary E-mail Address	Format	Delivery Method	Active	In All My Cases	Additional Options
cod_aty@yahoo.com	HTML	Individual NEF	Yes	Yes	Hide Options
jack_yee@cob.uscourts.gov	HTML	Individual NEF	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Hide Options

- When you click on the “**Active**” check box, the NEF options are displayed.
- Select/check the options you want for the **specific** e-mail address.

**Primary E-mail Address**

cod\_aty@yahoo.com

The **Primary e-mail address** field:

- Must be entered before any secondary e-mail addresses can be added.
- Must be in a valid format: name@host.network. For example: cod\_aty@yahoo.com

cod\_aty is the *name*, yahoo is the *host*, and com is the *network*

- Does **not** have to be the attorney’s e-mail address. The primary e-mail address is the e-mail listed on the docket sheet as the e-mail for the attorney.
- Should contain only **one** e-mail address.

If the **Primary e-mail address** field:

- Is blanked out, CM/ECF assumes the e-mail address is being deleted, when the change is submitted.
- Is typed over, the new e-mail address will become the new primary e-mail address and is the e-mail address shown with the attorney information on a docket sheet, when the change is submitted.

**NOTE:** Any changes will be **NOT** applied until the “**Submit**” button is clicked on an update screen is displayed showing any changes.

**Frame 8-4 The ALL IMPORTANT “Active” Check box**

Active  
Yes

For the **primary** e-mail address

The “Active” Field for the “Primary” e-mail address:

- Will **ALWAYS** display “Yes” as CM/ECF requires the primary e-mail address.
- The only method to stop NEF e-mails to the primary addressee is to delete/clear out the e-mail address.
- However, CM/ECF will display the following warning/error:

Please enter a primary e-mail address.

Options and additional addresses are not active without a primary e-mail address.

- You **CANNOT** add secondary e-mail addresses, nor can you choose any options for the primary e-mail if the primary e-mail address is blank.
- If you “Submit” a **blank e-mail address**, **NO One** will receive any NEF notifications.

Active

For all **secondary** e-mail addresses

The “Active” checkbox for the “Secondary” e-mail address:

- Is pre-checked, when initially displayed and assumes the secondary e-mail address will be active for NEF delivery. The other options are displayed for the user to select/change.
- If the “Active” checkbox is un-checked, **all** of the other options items are no longer displayed. Bottom Line: the secondary e-mail address will NOT receive NEFs
- If you delete the e-mail address, **ALL** of the option selections will not be displayed. In essence, you are “deleting” the secondary e-mail address.
- If you “Submit” a **blank e-mail address**, that secondary e-mail address will be deleted from the database.
- Any remaining secondary e-mail addresses are not affected by the deletion of specific secondary e-mail addresses.



Frame 8-5 The “Format” and “Delivery Method” Fields

The screenshot shows the 'Email Information for Attorney Yee' form. It has a blue header with the ECF logo and navigation tabs: Civil, Criminal, Query, Reports, Utilities. The form contains two rows of input fields. The first row is for the 'Primary E-mail Address' (cod\_aty@yahoo.com) with 'Format' set to 'HTML' and 'Delivery Method' set to 'Individual NEF'. The second row is for 'Secondary E-mail Addresses' (jack\_yee@cob.uscourts.gov) with 'Format' set to 'HTML' and 'Delivery Method' set to 'Individual NEF'. There are also checkboxes for 'Active My Cases' and 'In All'.

A close-up of the 'Format' dropdown menu. The menu is open, showing 'HTML' as the selected option and 'Text' as an alternative option.

For **primary** and **secondary** e-mail addresses

A close-up of the 'Delivery Method' dropdown menu. The menu is open, showing 'Individual NEF' as the selected option and 'Summary NEF' as an alternative option.

For **primary** and **secondary** e-mail addresses

The “**Format**” Field:

- Provides choices for the format for the **Notices of Electronic Filing (NEF)**.
- There are two choices, **HTML** and **Text**. The default is **HTML**. Most current e-mail applications are using the HTML format. HTML allows for more graphical displays and easier links, etc.
- Unless you are sure that your e-mail application is **Text** based, you should leave the default selection, **HTML**.

The “**Delivery Method**”:

- Provides **two** choices for the delivery method for the **Notices of Electronic Filing (NEF)**
- There are two choices, **Individual NEF** and **Summary NEF**.
- **Individual NEFs** indicates the e-mail address will receive individual NEFs. Bottom line, “**real-time**” notification of any activity in the case the attorney is involved in.

**NOTE:** The “**real-time**” notification is one of the benefits of CM/ECF. Unless there is a problem in the volume of e-mails the email address is receiving, the court recommends user keep the “**real-time**” notification.

- **Summary NEF** indicates the e-mail address should receive a “**Daily Summary**” of **ALL** NEFs for cases the attorney is involved in.
- The “**Summary NEF**” will be delivered, once a day, **AFTER 12:00 Midnight**. Bottom line, the e-mail recipient loses the “**real-time**” notification.

Frame 8-6 The “In All My Cases” and “Additional Options” Fields

The screenshot shows the ECF interface with a navigation bar (Civil, Criminal, Query, Reports, Utilities) and a title bar (Email Information for Attorney Yee). The form contains fields for Primary E-mail Address (cod\_aty@yahoo.com), Format (HTML), Delivery Method (Individual NEF), Active My Cases (Yes), In All My Cases (Yes), and Additional Options (Hide Options). A secondary e-mail address (jack\_yee@cob.uscourts.gov) is also listed with Format (HTML), Delivery Method (Individual NEF), and Active My Cases (checked). The 'In All My Cases' and 'Additional Options' fields are circled in red, and arrows point from them to callout boxes below.

**In All My Cases**  
Yes

For the Primary E-mail address

- Cannot be de-selected,
- CM/ECF requires the primary e-mail address to receive NEFs for all the cases the attorney is involved in.
- If the volume of e-mails going to the primary e-mail recipient is un-manageable, the **Delivery Method Exceptions (under Additional Options)** can reduce the volume of e-mails.

**NOTE:** Use this option with care and understanding as to how you will be noticed.

**In All My Cases**

For all Secondary E-mail addresses

- The “**In All My Cases**” check box is displayed un-checked for secondary e-mail recipients.
- If the “**In All My Cases**” check box is **checked**, the secondary e-mail address will also receive NEFs for all the cases the attorney will receive NEFs for.
- If the “**In All My Cases**” check box is **NOT** checked, the secondary e-mail address will **NOT receive any NEFs**, unless there are cases added via the **Specific or Additional Cases** option under “**Additional Options**”

**Additional Options**  
Hide Options

For primary and secondary e-mail addresses

The “**Additional Options**” is a drop down list that has three options:

- The “**Hide Options**” selection is the default and just “hides” the display of the information for the “**Specific or Additional Cases**” and the “**Delivery Method Exceptions**” options.
- Depending on what has been checked, the “**Specific or Additional Cases**” option allows the specific e-mail address recipient to add **specific** cases for notification and/or additional cases where the e-mail address will receive notice.
- Depending on what has been selected in the “**Delivery Method**” selection, the “**Delivery Method Exceptions**” option under “**Additional Options**” provides for the opposite delivery method. For example, if the “**Delivery Method**” is “**Individual NEF**”, the “**Delivery Method Exceptions**” allows the e-mail recipient to enter cases where the delivery method will be a “**Summary NEF.**”

**NOTE:** The “**real-time**” notification is one of the benefits of CM/ECF. Unless there is a problem in the volume of e-mails the email address is receiving, the court recommends user keep the “**real-time**” notification. “**Real-time**” is set by selecting the is “**Individual NEF**” under “**Delivery Method**”

**Frame 8-7 The “Additional Options” Fields continued  
(Specific or Additional Cases)**

The “**Specific or Additional Cases**” selection:

- If the “**In All of My Cases**” box is [checked], or displays “**Yes,**” the “**Specific or Additional Cases**” selection allows the e-mail recipient to enter cases that they are not a party to for e-mail notification of activity.
- Select the “**Add**” option. After selecting the “**Add**” option, a new text box labeled “**Enter case number**” is displayed.
- Enter the case number you wish to receive e-mail notification.
- [Click] on the **Add to List** button.
- The case number is displayed with the short title.
- Repeat the process to add additional cases to the list.

**Note:** If a case number is entered and there are more than one case number matching the entry, a dialog box is displayed and asking you to select the case you want, and [clicking] on the **Next** button.

- When all of the case numbers have been entered for the cases you want to receive e-mails on, you can
  - Select more “**Additional Options**”,
  - [Click] on the **Show** option
  - [Click] on the **Submit** button to apply the e-mail changes
  - Make changes to secondary e-mail addresses

**Note:** Changes are NOT applied until you [Click] on the **Submit** button.

**Frame 8-8 The “Additional Options” Fields continued  
(Delivery Method Exceptions)**

- Depending on what has been selected in the “**Delivery Method**” selection, the “**Delivery Method Exceptions**” option under “**Additional Options**” provides for the opposite delivery method. For example, if the “**Delivery Method**” is “**Individual NEF**”, the “**Delivery Method Exceptions**” allows the e-mail recipient to enter cases where the delivery method will be a “**Summary NEF.**”

- Select [**Add**] from the drop down list.

- Another drop down list is displayed to allow you to select cases for the [**Delivery Method Exception**].

- You can **ONLY** select **one case** at a time.

- After you select the case, [**Click**] on the **Add to List** button.

**Frame 8-9 The “Additional Options” Fields continued  
(Delivery Method Exceptions)**

The screenshot shows the 'Email Information for Attorney Yee' page. Under 'Delivery Method Exceptions', the 'Add' dropdown is selected, showing a list of cases including '1:05-cv-01000 Good Guys, Inc. v. Bad Guys - Representing Good Guys, Inc.'. Below this, there is a 'Secondary E-mail Addresses' section with fields for 'Primary E-mail Address' (cod\_aty@yahoo.com) and 'Secondary E-mail Address' (jack\_yee@cob.uscourts.gov), along with 'Format', 'Delivery Method', and 'Active My Cases' checkboxes.

- The case number is displayed with the short title
- Repeat the process to add additional cases to the list

This screenshot is similar to the previous one, but the 'Show' dropdown is selected instead of 'Add'. The 'Submit' button in the 'Secondary E-mail Addresses' section is highlighted with a grey background. Two arrows point from the 'Show' and 'Submit' buttons to the text on the right.

- When all of the case numbers have been selected for the cases you want to different delivery option,
- **[Click]** on the **Show** option to display all of the cases you have selected
- **[Click]** on the **Submit** button to apply the e-mail changes
- Make changes to secondary e-mail addresses

**Note: Changes are NOT applied until you [Click] on the Submit button.**

The screenshot shows a confirmation message: 'Updating person record... Update Person Prid: 436'. Below this, it says 'The update was successful... prid 436 - Attorney Yee'. A red oval highlights the 'E-mail configuration' section, which states: 'Primary e-mail address: cod\_aty@yahoo.com. This e-mail address is currently active, and normally receives individual NEFs in HTML format for all of your active cases. You have indicated that this e-mail address should receive NEFs for the following specific or additional cases: 1:06-cv-00001 John Doe v. USA. You have noted the following cases are delivery method exceptions and should send Summary NEFs instead: 1:05-cv-01000 Good Guys, Inc. v. Bad Guys. Secondary e-mail address: jack\_yee@cob.uscourts.gov. This e-mail address is currently active, and normally receives individual NEFs in HTML format.'

A confirmation or summary is displayed to you to indicate how NEFs will be sent. You should review this screen carefully to ensure the changes you made are what you intended.

**Frame 8-10 Removing cases from “Specific or Additional Cases” or “Delivery Method Exceptions”**

**ECF** Civil • Criminal • Query • Reports • Utilities

Email Information for Attorney Yee

Primary E-mail Address: cod\_aty@yahoo.com | Format: HTML | Delivery Method: Individual NEF | Active: Yes | In All My Cases: Yes | Additional Options: Delivery Method Exceptions

**Remove** Delivery Method Exceptions

The following cases will receive Summary NEF e-mails:

- 1:05-cv-01000 Good Guys, Inc. v. Bad Guys - Representing Good Guys, Inc.
- 1:05-cv-02000 Miller v. Smyth - Representing George Smyth

Select case from list and click

Secondary E-mail Addresses

jack\_yee@cob.uscourts.gov | HTML | Individual NEF |  |  | Hide Options

**ECF** Civil • Criminal • Query • Reports • Utilities

Email Information for Attorney Yee

Primary E-mail Address: cod\_aty@yahoo.com | Format: HTML | Delivery Method: Individual NEF | Active: Yes | In All My Cases: Yes | Additional Options: Delivery Method Exceptions

**Remove** Delivery Method Exceptions

The following cases will receive Summary NEF e-mails:

- 1:05-cv-01000 Good Guys, Inc. v. Bad Guys - Representing Good Guys, Inc.
- 1:05-cv-02000 Miller v. Smyth - Representing George Smyth

Select case from list and click

Secondary E-mail Addresses

jack\_yee@cob.uscourts.gov | HTML | Individual NEF |  |  | Hide Options

**ECF** Civil • Criminal • Query • Reports • Utilities

Email Information for Attorney Yee

Primary E-mail Address: cod\_aty@yahoo.com | Format: HTML | Delivery Method: Individual NEF | Active: Yes | In All My Cases: Yes | Additional Options: Delivery Method Exceptions

**Remove** Delivery Method Exceptions

The following cases will receive Summary NEF e-mails:

- 1:05-cv-01000 Good Guys, Inc. v. Bad Guys - Representing Good Guys, Inc.

Select case from list and click

Secondary E-mail Addresses

jack\_yee@cob.uscourts.gov | HTML | Individual NEF |  |  | Hide Options

**NOTE:** The process to remove cases from either the **Specific or Additional Cases** or the **Delivery Method Exceptions** work in the same manner.

These samples show the case removal from **Delivery Method Exceptions**.

Remember, the process to remove case from the case list for **specific or Additional Cases** is the same.

- Select **Remove** from the drop down list.
- Select the case you wish to remove by clicking on it. The selection will be highlighted in blue.
- **Click** on the  button.

• The case is removed and the remaining case(s) are re-displayed.

• Repeat the process to add additional cases to the list

**Note:** Changes are **NOT** applied until you click on the  button.



### Frame 8-11 Court Recommendations:

With Version 3.x of CM/ECF, there are a myriad of options and possibilities as to delivery of electronic notifications.

**Unless there is a need to have exceptions, the court recommends the following:**

#### 1. Each e-mail set up for the attorney should

- Unless the user is using a text based e-mail application, **HTML** should be the format of choice.
- Receive **“real time” notification** (select the **“Individual NEF”** under **Type of Delivery.**)
- The **“Active”** box is checked. **Note:** If the **“Active”** box is **NOT** Checked, the e-mail address **WILL NOT** receive e-mail notifications.
- The **“In All Cases”** check box should be checked. **Note:** If the **“In All Cases”** box is **NOT** Checked and the **“Active”** box is checked, the e-mail address still **WILL NOT** receive e-mail notifications.
- No **“Additional Options”** should be selected.

#### 2. Using the court recommendations, **each** e-mail address set up for the attorney will benefit from:

- All e-mails will be in the **HTML** format
- Because the **“Active”** and **“In All of My Cases”** check boxes have been checked and the **“Individual NEF”** is selected, all e-mail addresses will receive **“real time”** notification of activity in any case the attorney is an active in.
- Finally, since no **“Additional Options”** have been selected, there are no “exceptions” in the notification process.

**Final Note:** If other options are selected our used, it’s recommended that **ALL e-mail addresses be set up the same way.**

### Frame 8-12 Adding an additional e-mail address

Primary E-mail Address	Format	Delivery Method	Active	In All My Cases	Additional Options
cod_aty@yahoo.com	HTML	Individual NEF	Yes	Yes	Hide Options

- On the Email Information screen, **[Click]** on the **Add Additional E-mail Address** button.

Primary E-mail Address	Format	Delivery Method	Active	In All My Cases	Additional Options
cod_aty@yahoo.com	HTML	Individual NEF	Yes	Yes	Hide Options

**Secondary E-mail Address**

- A new text box is displayed under the **“Secondary Email Addresses”** title. The text box is open for entry of the new email address.

**Frame 8-13 Adding a new email address, continued**

- As you enter the new email address, the additional drop down boxes and check boxes are displayed.
- The additional items displayed are:
  - Format for e-mail messages sent via CM/ECF
  - Delivery Method, Individual (real time) or summary (batch)
  - Active and In All of My Case check boxes,
  - Additional Options for the e-mail address.

**NOTE:** the “default” is to have the “Active” box checked for the e-mail address.

**Frame 8-14 The “Active” Check Box**

- If the “Active” box is unchecked for a new e-mail entry or for an existing e-mail address, the **format, delivery method, In all of my cases check box, and Additional Options** are no longer displayed. The “Active” check box is displayed as unchecked.
- When you **[Click]** on the **Submit** button, the changes made are submitted.
- In this example, the user was adding a new e-mail address (See Frames 8-3, 8-4.) However, in the process, the “Active” check box was un-checked and the submission was made.

The confirmation screen displays the second e-mail address **BUT** it is not active. The e-mail address is kept in the database but the e-mail address **WILL NOT RECEIVE ANY NEFs**.

**Frame 8-15 Activating an existing E-mail Address**

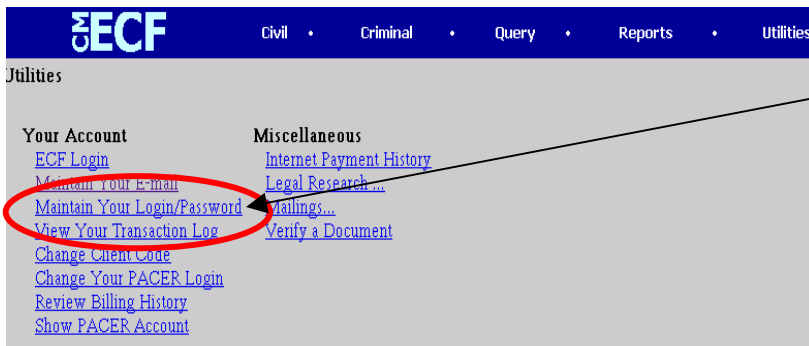
- Going back into [Maintain Your E-mail](#) from the **Utilities** Menu, the e-mail screen is displayed with the current e-mail address (es) in the system and their status.
- The primary e-mail address is active. And displays NEF options.
  - The secondary e-mail is in the system but is **NOT ACTIVE** and None of the NEF options are displayed.

**Frame 8-16 Secondary E-mail Options.**

The “Format”, “Delivery Method”, “Active” and “In All My Cases” Check boxes, and “Additional Options” (“Specific or Additional Cases”, and “Delivery Method Exceptions” have been covered in Frames 8-4 through 8-1.



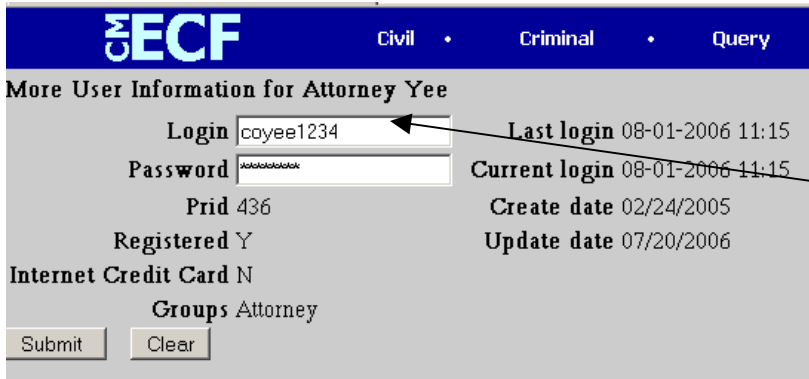
### Frame 8-17 Maintain Your Login/Password



The screenshot shows the ECF Utilities menu. The 'Maintain Your Login/Password' link is circled in red. Other links include 'ECF Login', 'Miscellaneous', 'Internet Payment History', 'Legal Research...', 'Mailings...', 'Verify a Document', 'View Your Transaction Log', 'Change Client Code', 'Change Your PACER Login', 'Review Billing History', and 'Show PACER Account'.

Maintain Your Login/Password.

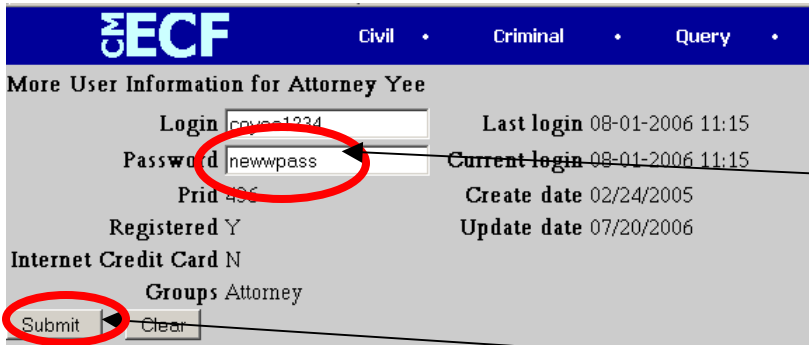
- From the **Utilities** menus, **[click]** on **Maintain Your Login/Password** link.



The screenshot shows the 'More User Information for Attorney Yee' form. The 'Login' field contains 'coyee1234' and the 'Password' field contains a string of asterisks. Other fields include 'Last login', 'Current login', 'Prid', 'Registered', 'Internet Credit Card', 'Groups', 'Create date', and 'Update date'. There are 'Submit' and 'Clear' buttons at the bottom.

- There are **ONLY** two fields that can be changed. **NEVER** change the "Login" information.

Notice that ECF displays a string of asterisks in the "Password" field. To change your ECF password, place your cursor in the "Password" field and delete the asterisks. Then, type in your new password. ECF displays the actual characters of your new password as you type.

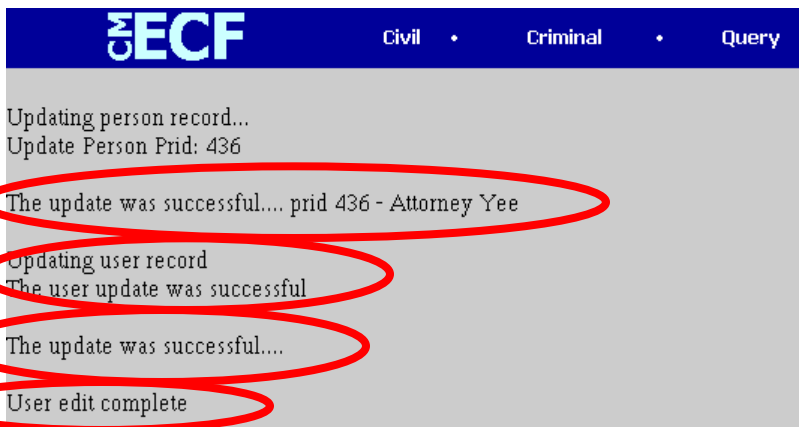


The screenshot shows the 'More User Information for Attorney Yee' form with the password field now containing 'newwpass'. The 'Submit' button is circled in red. Other fields and labels are the same as in the previous screenshot.

- You can and should regularly change your password. It's a maximum of **8 characters**. You will see the password you type in, as there is no confirmation entry.

**The password is CASE Sensitive**

- After changing your password, **[Click]** on the **Submit** button apply the password change.

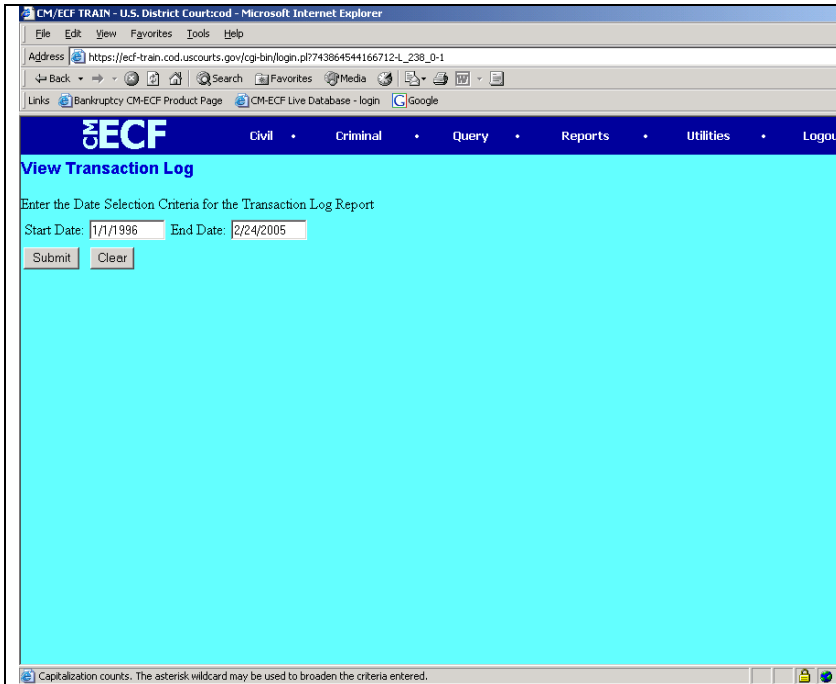


The screenshot shows the 'View Your Transaction Log' page. It displays a series of status messages: 'Updating person record... Update Person Prid: 436', 'The update was successful.... prid 436 - Attorney Yee', 'Updating user record', 'The user update was successful', 'The update was successful...', and 'User edit complete'. Each message is circled in red.

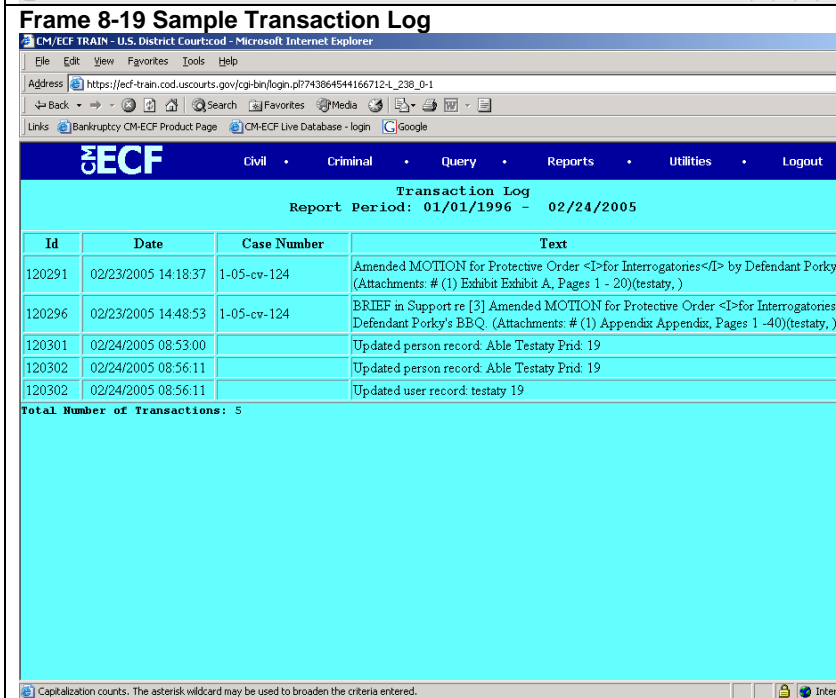
- After submitting, a confirmation screen will be displayed indicating the update status.

### Frame 8-18 View Your Transaction Log

View Your Transaction Log



- When you click on the [View Your Transaction Log](#) link, the View Your Transaction date screen is displayed.
- Whatever beginning and ending date range you enter, ECF will display a report of **ALL** the transactions performed between the dates you entered.
- After entering the date range for beginning and ending dates, click on the **[Submit]** button.



- Sample Transaction Log
- The Transaction Log is returned with a list of activity.
  - This is helpful in reviewing the following:
    - Work you have done.
    - Determining if you docketed in the wrong case.
    - Review for unauthorized activity.
  - **This Transaction Log is provided at no charge to the customer.**

### Frame 8-20 Mailings

ECF Civil • Criminal • Query

**Utilities**

**Your Account**

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

**Miscellaneous**

- [Internet Payment History](#)
- [Legal Research ...](#)
- [Mailings](#)
- [Verify a Document](#)

### Frame 8-21 Mailing information sub-menu

ECF Civil • Criminal • Query

**Mailings**

- [Mailing Info for a Case](#)
- [Mailing Labels by Case](#)

### Frame 8-22 Mailing info for a case - Case number entry screen

ECF Civil • Criminal • Query

**Mailing Information for a Case**

Enter the case number to view the recipient list.

Case Number:

### Frame 8-23 Mailing info for a case display

ECF Civil • Criminal • Query • Reports • Utilities • Logout

**Mailing Information for a Case 1:05-cv-01000-EWN**

**Electronic Mail Notice List**

The following are those who are currently on the list to receive e-mail notices for this case.

- Chris Vagner  
chris\_vagner@cod.uscourts.gov cod\_aty@yahoo.com
- Jack Yee  
jack.yee@cob.uscourts.gov

**Manual Notice List**

The following is the list of attorneys who are **not** on the list to receive e-mail notices for this case (who therefore require manual noticing). You may wish to use to select and copy this list into your word processing program in order to create notices or labels for these recipients.

- (No manual recipients)

### Mailings

- When you click on the [Mailings](#) link, Mailings sub-menu is displayed.

- The Mailing sub-menu has options displayed as well. Click on the “Mailing Info for a Case” link.

- Enter the case number you want to get mailing information on.

- After entering the case number, click on the **[submit]** button.

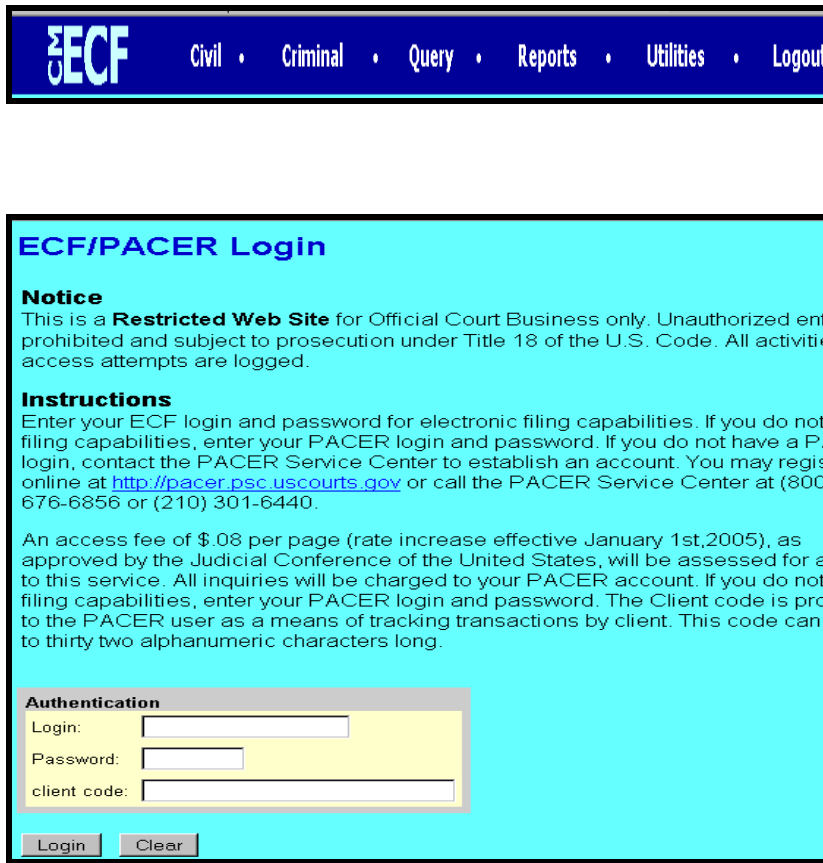
- ECF returns a display of how ECF will “notice” the parties in the specified case.

- In this example, the attorneys have e-mail address and will be noticed electronically by e-mail.

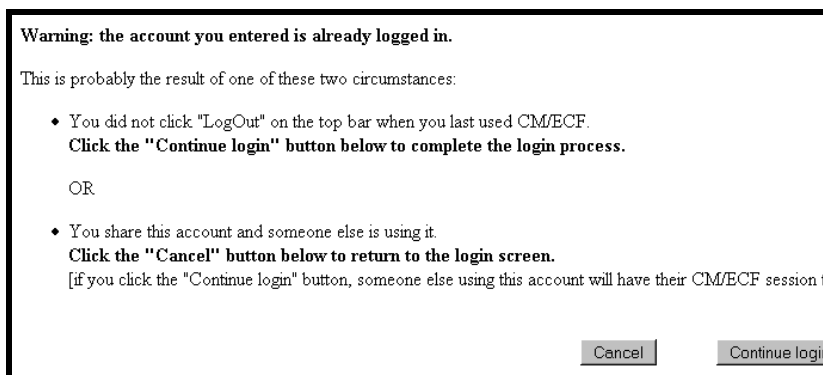
- If there were “manual” recipients listed, their names and address would be displayed here. In this example, there are no “manual” recipients.

- You can highlight the text here and copy into your Certificate of Service.

**Frame 8-24 ECF Logout**



**Frame 8-25 ECF Login warning screen**



**ECF Logout**

- After you have completed all of your transactions for a particular session in ECF, you should log out of the system. Click on the **Logout** function from the ECF *Blue* menu bar.

- ECF will log you out of the system and return you to the ECF login screen.
- It's important to use the **Logout** option as it terminates the cookie that was created for your ECF session.

- If you don't Logout properly, the next time you try to log on, you will get a **Warning** display as shown.

- The **"warning"** message is to warn you that ECF thinks you are still logged on **or** someone else is logged on as you.

- If you click on the **[Continue Login]** button, ECF will continue to log you on.

- However, if someone else is actually logged on with this login, you will terminate their session and any activity they were doing will be aborted.


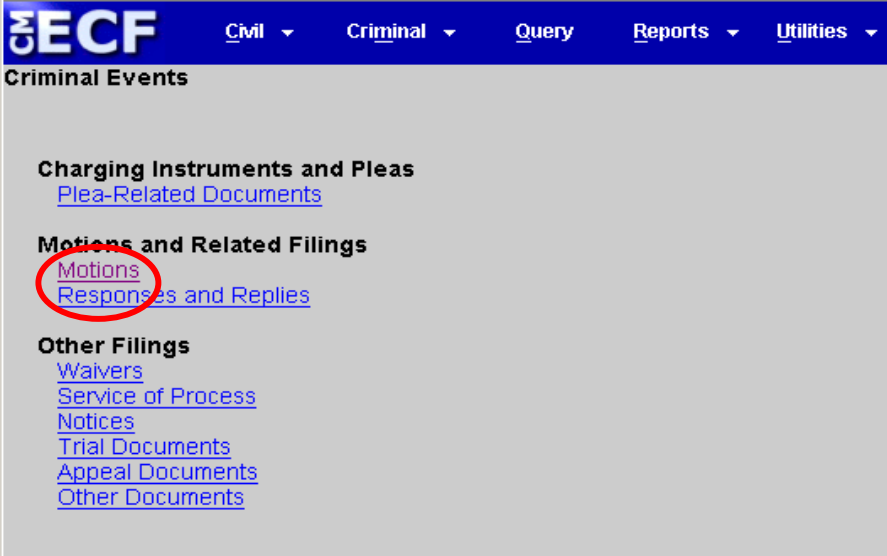
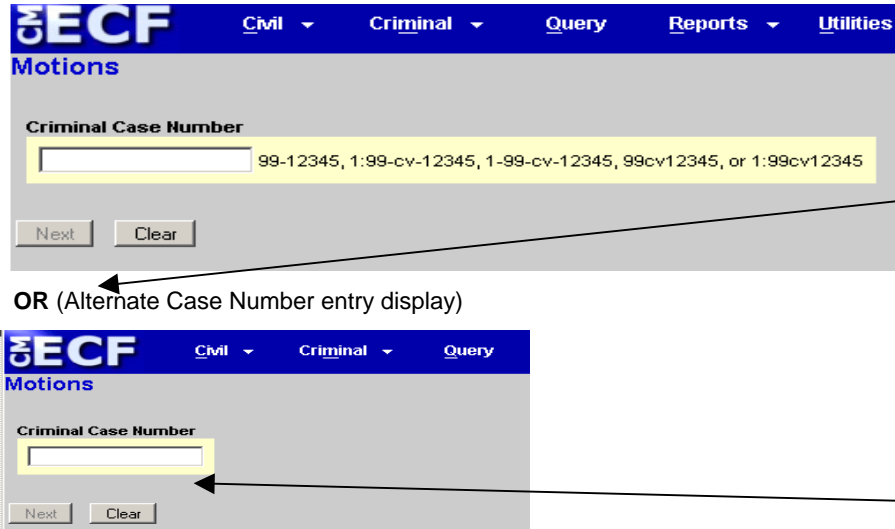


- To avoid getting the **"warning"** display, use the **Logout** option to actually log out of ECF.

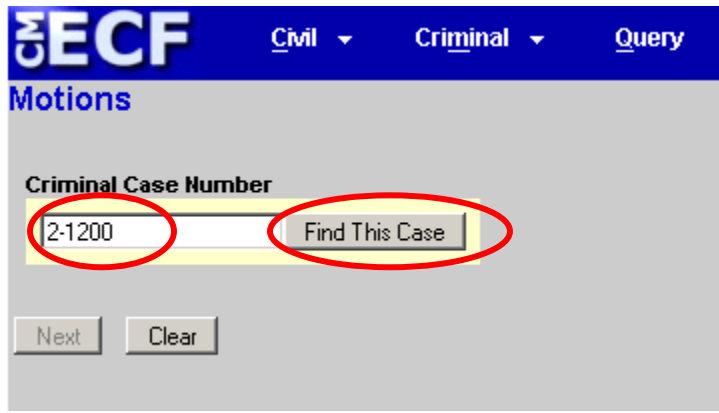
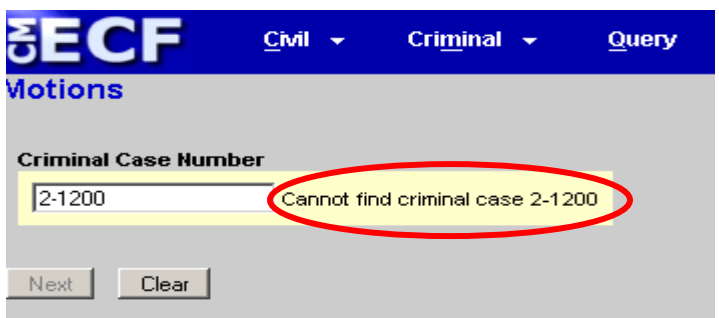
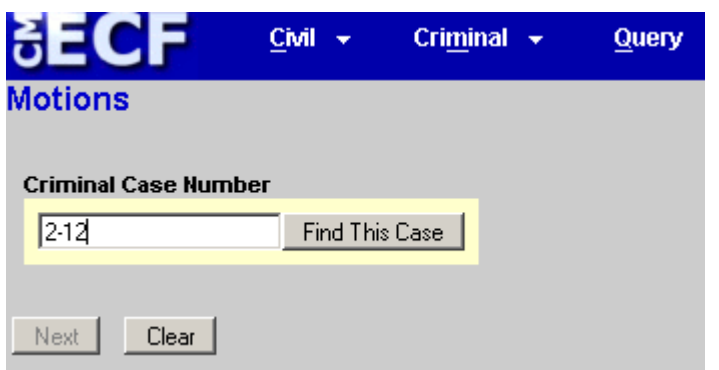
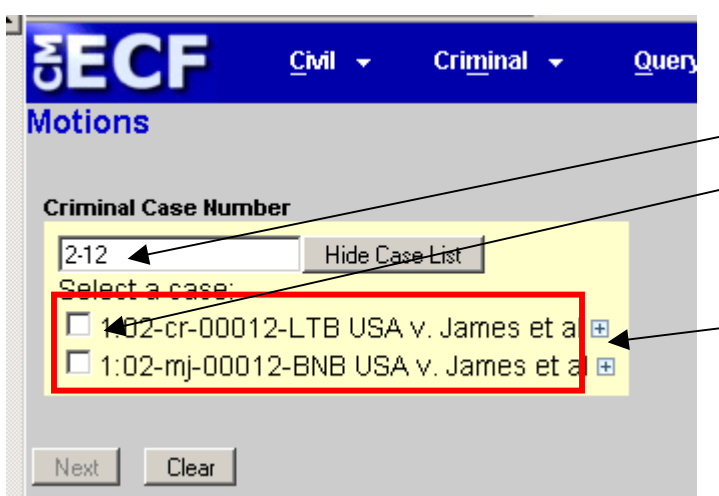
## Chapter 9 Criminal Case Docketing

**Note: Beginning with Version 3.1 of CM/ECF, the Blue Menu Bar provides options to continue to use the static menu selections or the cascading menu options to navigate from one function to another more easily. These examples continue to show the static approach. See Appendix 3 to learn more about cascading menus.**

### Filing a Motion

As an illustration, this section of the User Manual describes the basic steps you will need to take to file a motion with the court. The process for filing other types of documents using other criminal events is similar.

<p><b>Frame 9-1 ECF Menu Bar</b></p> 	<p><b>ECF Menu Bar</b></p> <ul style="list-style-type: none"> <li>• After successfully logging into ECF, click on <b>Criminal</b> from the <i>blue</i> menu bar at the top of the ECF screen.</li> </ul>
<p><b>Frame 9-2 Criminal Docketing Categories</b></p> 	<p><b>Criminal Docketing Categories</b></p> <ul style="list-style-type: none"> <li>• Using the cascading menus or clicking on the <b>Civil</b> option on the CM/ECF Blue Menu Bar will display the Civil Events page of categories.</li> <li>• Click on the <b>Motions</b> link.</li> </ul>
<p><b>Frame 9-3 Identifying the case</b></p>  <p>OR (Alternate Case Number entry display)</p>	<p><b>Identify the case</b></p> <ul style="list-style-type: none"> <li>• Identify the Case for Which the Document is Being Filed.</li> <li>• Enter the number of the case for which the document is being filed.</li> </ul> <p><b>Note:</b>   The Next button is grayed out which indicates the button is not functional until a valid case is entered.</p>

<p><b>Frame 9-4 Case number entry</b></p> 	<ul style="list-style-type: none"> <li>• Once you begin to enter a case number, the <b>Find This Case</b> button is displayed.</li> <li>• After entering the entire case number, click on the <b>Find This Case</b> button.</li> </ul>
<p><b>Frame 9-4b Case number entry error</b></p> 	<ul style="list-style-type: none"> <li>• If the case number is not valid, a message is displayed next to the entry box. The <b>Next</b> button continues to be grayed out.</li> </ul>
<p><b>Frame 9-4c case Number entry – correction</b></p> 	<ul style="list-style-type: none"> <li>• Correct the case number entry and click on the <b>Find This Case</b> button.</li> </ul>
<p><b>Frame 9-4d Case selection for duplicate case numbers</b></p> 	<ul style="list-style-type: none"> <li>• If there are multiple case numbers with the same number (different case type), a display list will be shown to indicate the case number choices and check boxes to allow you to check the case you want to file your motion.</li> <li>• <b>Additionally</b>, if there is a <b>+</b> displayed, it indicates there are multiple defendants in the case.</li> <li>• Clicking on the <b>+</b> sign will expand the entries to show all of the defendants.</li> </ul>

**Frame 9-4e Multiple Defendants list**

**Multiple Defendant list**

- If there are multiple case numbers with the same number (different case type), a display list will be shown to indicate the case number choices and check boxes to allow you to check the case you want to file your motion.

- If the filing is related to **all** of the defendants, check the **main** case check box.

**Note:** If you check the **main** case check box, all of the individual defendant's check boxes are grayed out.

**Frame 9-4f Multiple Defendants list**

- If you want a specific defendant or several individuals, you can check the appropriate check boxes for each defendant.

**Note 1:** If you check a specific **defendant's** check box, the other check boxes for that case can still be checked. This allows you the ability to select multiple defendants. .

**Note 2:** When you select a specific defendant, the case number entry box is changed to indicate the defendant's case you selected.

**Note 3:** When you select multiple defendant cases, the case number entry box is changed to indicate the defendants you select.

**Note 4:** You can see that the other case's check box is grayed out as ECF assumes you are filing in the case where the check box has been checked.

- After selecting the case/defendants, click on the **Next** button.

**Frame 9-5**

**Note:** ECF defaults to the last case from which you worked. Ensure the proper case number is entered in this field to avoid filing your document in the wrong case.

**Frame 9-6 docketing the motion**



- Click on the **Next** button to continue the docketing process.

**Frame 9-7 Selecting the filing party**



Selecting the filing party

- Highlight the name of the party for whom you are filing the document.
- If you represent more than one party, select **multiple** parties by holding down the **[CTRL]** key while pointing and clicking on each party you represent
- If done correctly, each party selected will remain highlighted.
- Click on the **[Next]** button.

**Frame 9-8**

**Note:** If the list depicted does not display the party or parties a user represents, contact the Help Desk at 1-866-365-6381 or 303-335-2050 Monday thru Friday, from 8:00 a.m. to 5:00 p.m. (Mountain Time) with your party's information. Only court personnel can add or create new parties to a case. If you click on the Add/Create New Party hyperlink, ECF returns an error message advising you of this restriction.



**Frame 9-9 Attorney/Party association screen**

Attorney/Party association screen

- If this is the **first time** the attorney is filing in the case, the Attorney/Party Association window will appear. The purpose of the window is to create an association (“link”) between the attorney and the party.
- Check the box if the attorney and party should be “linked” in ECF. As you can see from the message, **If you DO NOT CHECK the box, you will NEVER RECEIVE NOTICE**
- Check the box (es) of the parties you represent.
- Click the **[Next]** button.

**Frame 9-10 Motion selection screen**

Selecting Motion Events

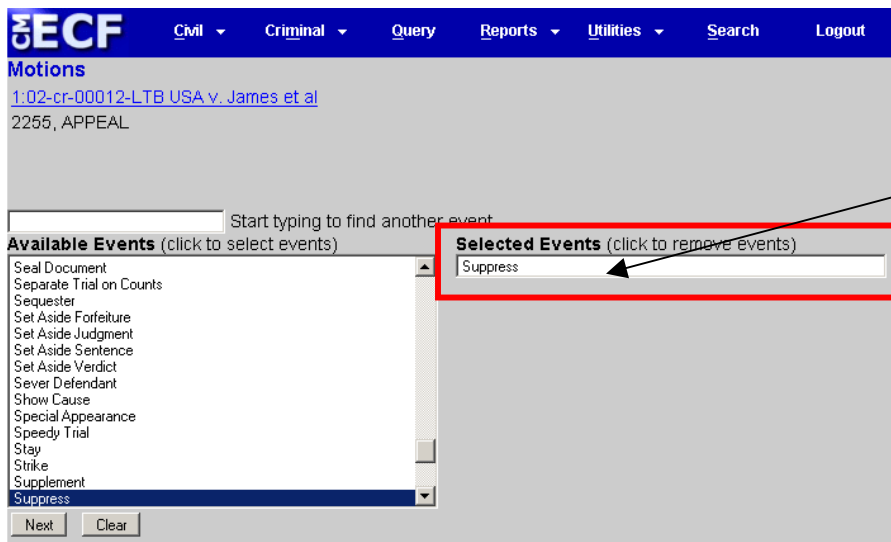
- A list all of the motion events are displayed alphabetically.
- In the search text box, you can enter the beginning letters of the motion event you want to select.
- You may also scroll up/down the scroll bar in the “**Available events**” list to facilitate your selection of motion events/

**Frame 9-10a Motion selection screen (continued)**

- For example, if we want to find “suppress”, we can start by entering suppl....
- The Available Events list display events that have a word starting with the letters entered.

**Note:** After entering ‘**suppl**’, Supplement and Suppress are displayed. The search finds any word, beginning with the letter(s) entered, regardless of position. Therefore, “wild card characters will not work.

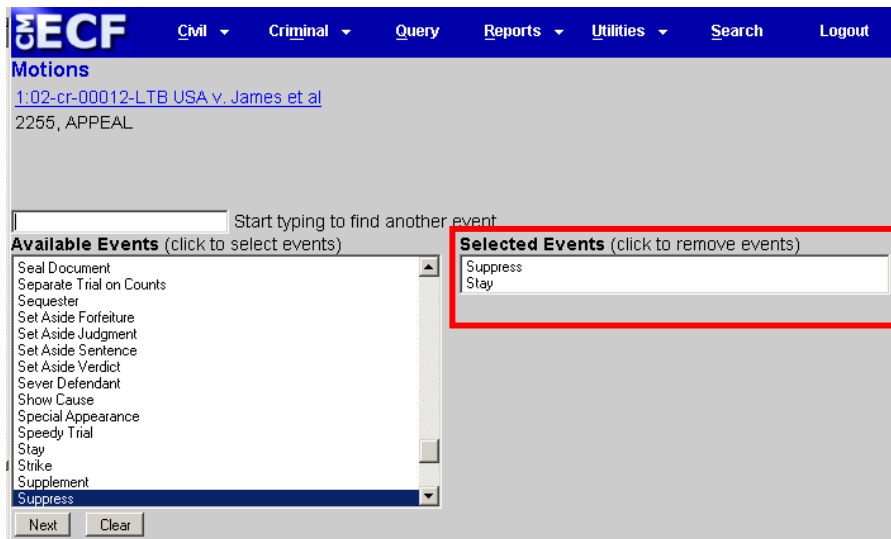
**Frame 9-10b Motion selection screen (continued)**



Searching for motions from the motions list

- You can continue to enter more letters, or if the event is listed, you can click on the event to select.

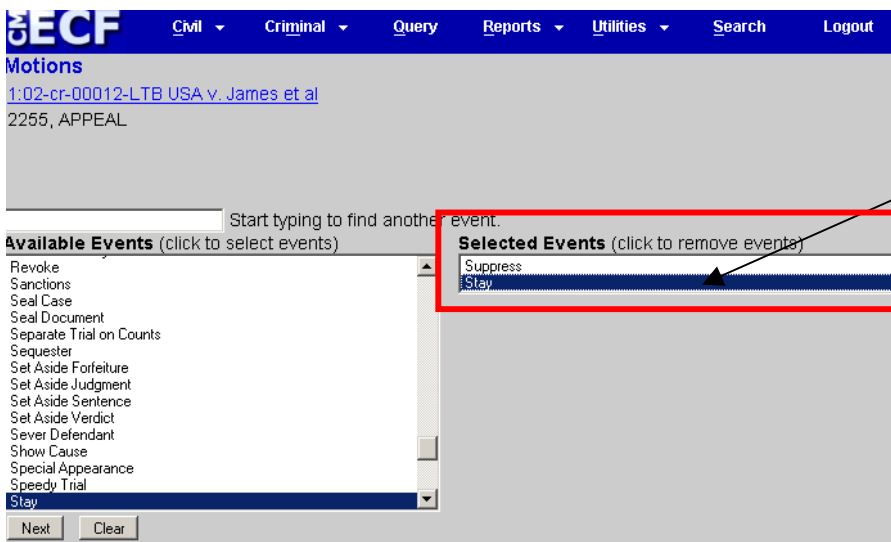
**Frame 9-10c Motion selection screen (continued)**



Selecting the specific supporting document.

- Once you click on the event, it's displayed in the **Selected Events** display box.
- You can select multiple events by clicking on other events from the **Available Events** list.
- For example, if "Stay" is clicked from the **Available Events** list, it's added to the **Selected events** list.
- Whatever is in the **Selected Events** list when the **Next** button is clicked, will be the motion event(s) filed.

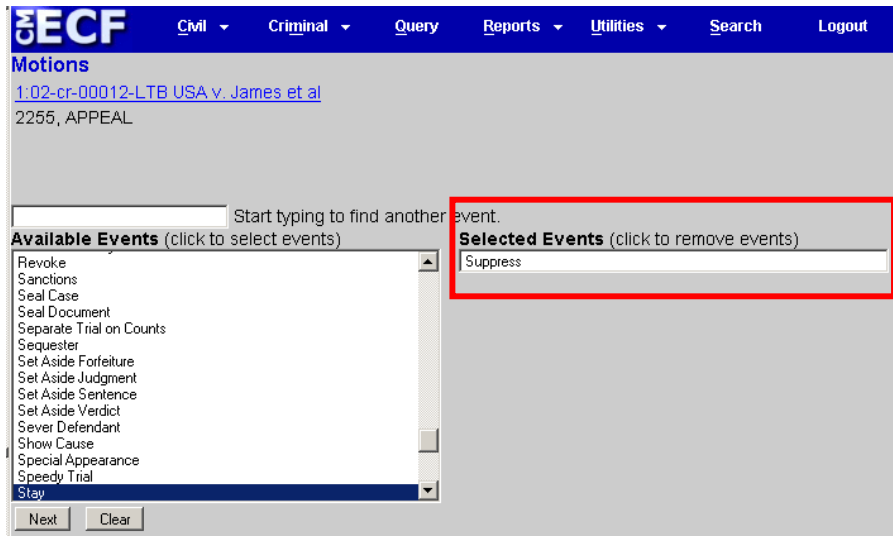
**Frame 9-10d Motion selection screen (continued)**



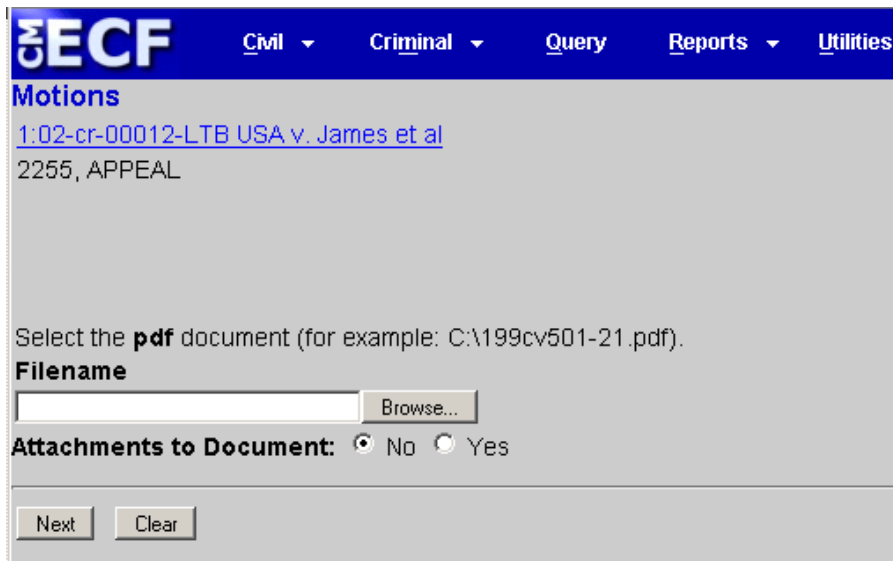
Removing a selected motion from the selected list

If you want to remove any of the events from the **"Selected Events"** list, you click on the event in the **"Selected events"** list. Once it's clicked on, it will be removed from the **"Selected events"** list.

**Frame 9-10e Motion selection screen (continued)**



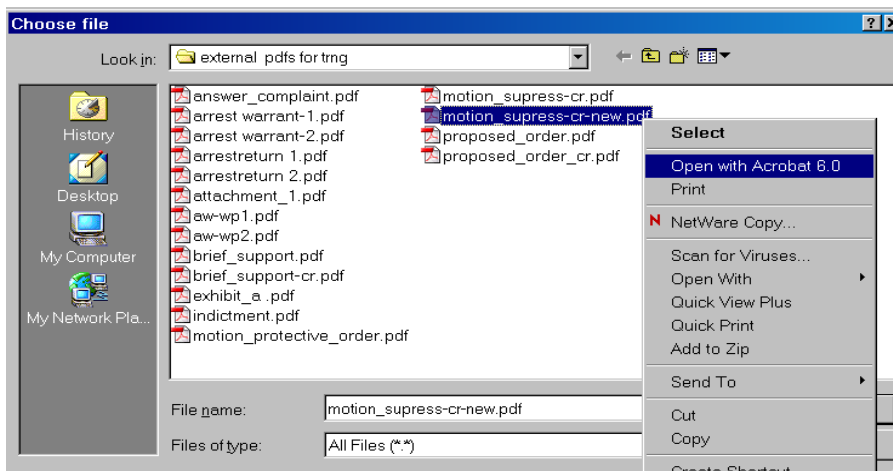
**Frame 9-11 Specify the PDF Document to File.**



Specify the PDF Document to File.

- ECF provides the filer an entry box to indicate the **main document** as well as indicating, via the **attachment radio button**, if there are any attachments to the main document being filed.
- Click the **[Browse]** button.

**Frame 9-12 Viewing the PDF document**



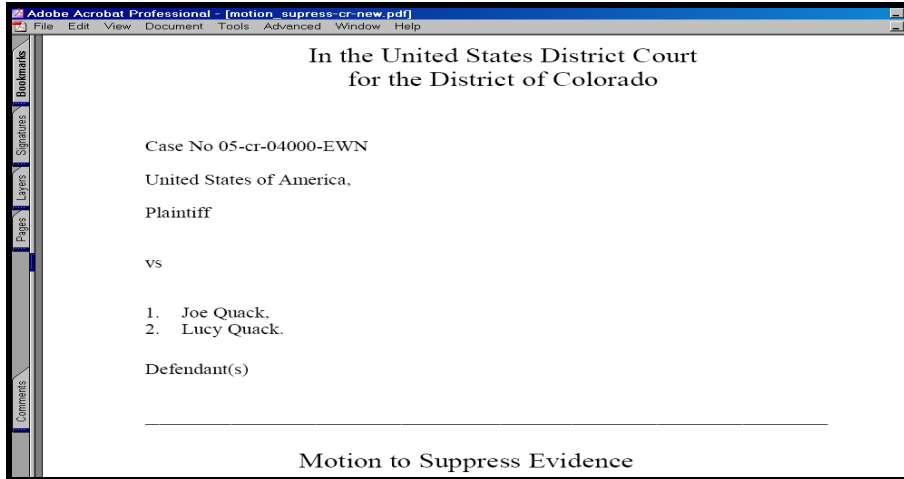
Viewing the PDF document

- The Choose File dialog box will appear and you can navigate to the folder (or location) where you have the PDF document.
- The court highly recommends you right click and open the document up in Adobe Reader (or Adobe Acrobat) to view the PDF document to ensure it is the correct PDF document you wish to file.

**Frame 9-13**

**Note: It is highly recommended you view the PDF document and any attachments to ensure you are filing the correct documents in the ECF application.**

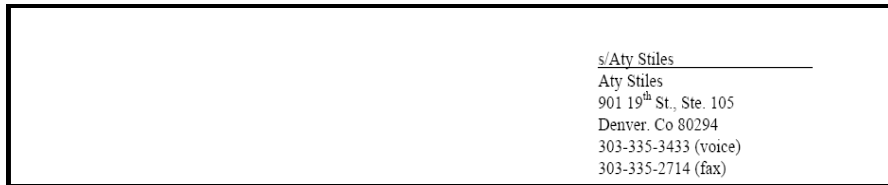
**Frame 9-14 Review the PDF document**



Review the PDF document

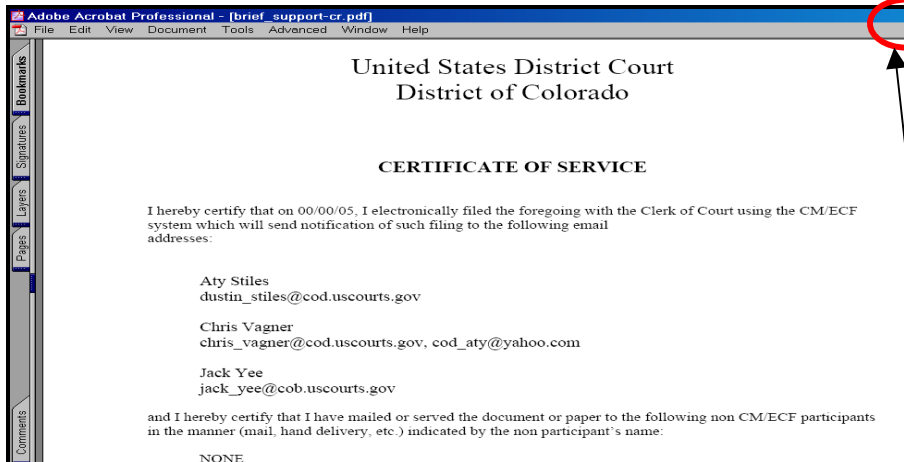
- Each PDF attached is limited to the 2 MB court standard on document size, but a transaction with attachments may exceed the standard.
- When viewing the PDF document, check the document for items such as:
  - court
  - case number and style
  - parties
  - correct document

**Frame 9-15 Review the PDF document (Continued)**



Review the PDF document (Continued)

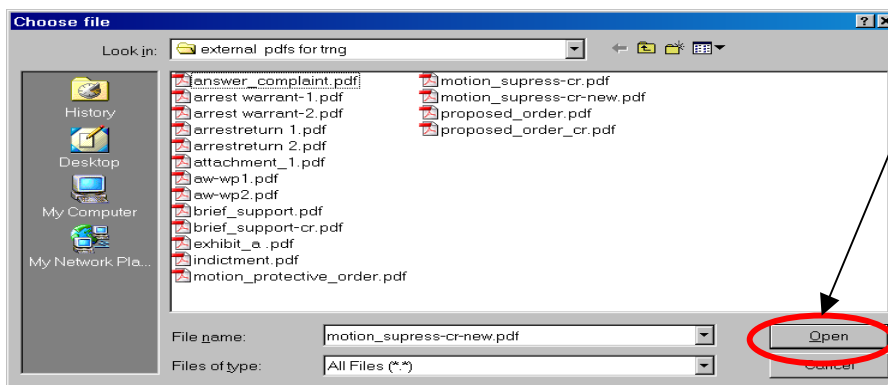
- The signature (i.e. s/ and the attorney name
- Is the "Certificate of Service" part of the main document?



- The "Certificate of Service" does not need to be a separate attachment. It's considered to be part of the main document.
- The s/ on the "Certificate of Service" can be the attorney or the secretary, paralegal, or administrator.
- After viewing the PDF document, close the Adobe application by **[clicking]** in the "x" in the top right corner of the Adobe application.

Choose file dialog box

**Frame 9-16 Choose file dialog box**



- Click on the **[OPEN]** button to populate the entry box for the filename.

**Frame 9-17 Attaching additional PDF documents to the main document such as exhibits, proposed orders, etc.**

Attaching additional PDF documents to the main document such as exhibits, proposed orders, etc.

- The Filename box is now filled with the name of the main document.
- If there are attachments to the main document, click on the **[yes]** radio button.
- Click the **[NEXT]** button.

**Frame 9-18 Additional Attachments**

Additional Attachments

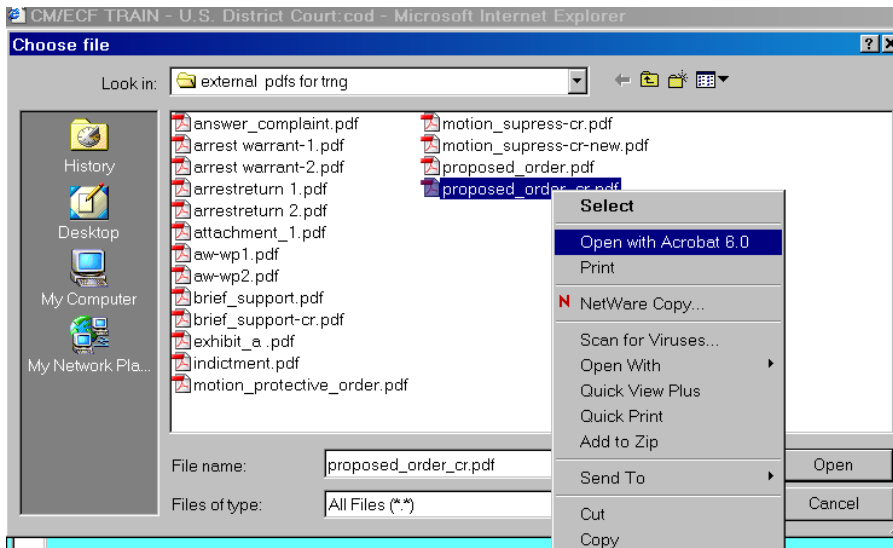
- Similar attaching the main document, the attachment screen is displayed.
- Click on the **[Browse]** button.

**Frame 9-19 Select and view the PDF Document**

Select and view the PDF Document

- The Choose File dialog box will appear and you can navigate to the folder (or location) where you have the PDF document.
- The court highly recommends you right click and open the document up in Adobe Reader (or Adobe Acrobat) to view the PDF document to ensure it is the correct PDF document you wish to file.

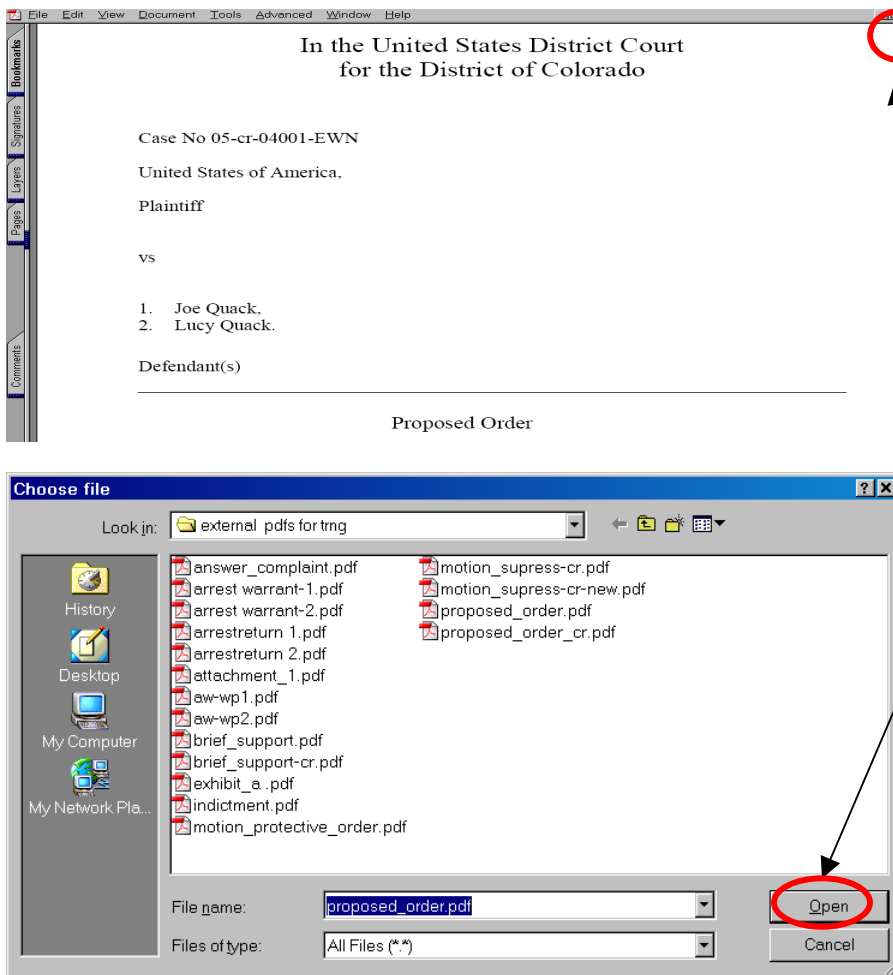
### Frame 9-20 Opening up Adobe Reader or other PDF viewing software



Opening up Adobe Reader or other PDF viewing software

- Right Click on the PDF document.
- Highlight the “Open with Acrobat X.X”
- Adobe Acrobat or Adobe Reader will open and the PDF document will be displayed for your review.
- **It’s very important that you review the PDF document to ensure it is the correct document you want to file.**

### Frame 9-21 Review the PDF Document



Review the PDF Document

- When viewing the PDF document, check the document for items such as:
  - court
  - case number and style
  - parties
  - correct document
- Since this is a proposed order, remember to send the WordPerfect or WORD version to the Magistrate and District Judge via e-mail as described in the ECF Procedures.
- After viewing the PDF document, close the Adobe application.
- Click on the **[OPEN]** button to populate the ECF Filename entry box.

**Frame 9-22 Describing the attachment**

Describing the attachment

- The Filename entry box should be filled in on the CM/ECF Filename box.
- Under the **Category** entry box, there is a drop down arrow to allow you to select the type of attachment it is. Click on the drop down arrow to see the list of attachment types. If the type does not fit the attachment, select the blank entry.
- You can enter a description to provide additional information.

For example, if you have to break up an exhibit, you can enter the page numbers of the exhibit being submitted. In the Description field you can enter Pages 1 – 30.

**Frame 9-23 Selecting the category descriptor**

Selecting the category descriptor

- In our example, we do not need to further describe the document, so we leave it blank.

Click on the **[Add to List]** button.

**Frame 9-24 Repeating the process for additional attachments**

Repeating the process for additional attachments

- The filename of the attachment is displayed in the list box.
- **Repeat** the steps above to add additional attachments.
- When all of your attachments are added to the list, click the **[NEXT]** button.

**Frame 9-25**

**Note:** If the judicial officer's procedure calls for the submission of a proposed order, users are required to submit a proposed order as a PDF attachment to the document. They are also required to submit a WordPerfect or WORD version of the document to the district judge as an e-mail attachment. Please review the requirements in the ECF Procedures.



**Frame 9-26 Modify docket text, as necessary**

Modify docket text, as necessary

- Modifying docket text is optional. Users do not have to modify text in all of the text boxes provided.
- It is important when modifying text to accurately describe the motion, particularly as there may be similarly titled motions within the same case. For example, there may be multiple motions to extend time.
- Click on the down-arrow located to the left of the blue text-box to open a modifier pull-down list. You may select one of the words in the pull-down list or leave the field blank.

Click on the text-box by the party's name, and type a description of the document. This added text will part of the docket entry.

After entering all applicable docket text, click on the **[Next]** button.

**Frame 9-27 Submit the Transaction to ECF**

Completing the Transaction

- **THIS IS THE "LAST" SCREEN FOR YOU TO REVIEW!!** If you click the **NEXT** button, the transaction is posted to the database.
- An informational message as to the path and filename of the PDF document is displayed for review. This provides the user a "final" opportunity to check the filename as to it being the correct document. **If it's not the correct document, you should abort this transaction and start over again.**

**Note:** You **CANNOT** view any of the actual the document(s), only the path, filename, and number of pages.

- Click on the **[Next]** button to commit the transaction.

**Frame 9-28**

**Note:** At any time prior to this step, you can abort the ECF filing by simply clicking on a menu item on the blue menu bar, including logging out of the system. Users should avoid using the [Back] button in complicated transaction, as it is easier to just start over. When using the [Back] button, a user may not use the [Forward] button on the web browser when the correction has been made. Progression must be made using the ECF



**Frame 9-29 Receive the Notice of Electronic Filing confirmation**

**U. S. District Court [TEST]**  
**District of Colorado [TEST]**

**Notice of Electronic Filing**

The following transaction was entered by Yee, Attorney on 7/2/2007 at 12:06 PM MDT and filed on 7/2/2007

**Case Name:** USA v. James et al  
**Case Number:** [1:02-cr-12](#)  
**Filer:** Dft No. 1 - Robert E. James  
**Document Number:** [479](#)

**Docket Text:**  
[Tenth MOTION to Suppress Evidence from 123 Back Alley Dr. by Robert E. James. \(Attachments: # \(1\) Proposed Order \(PDF Only\)\)\(Yee, Attorney\)](#)

**1:02-cr-12-1 Notice has been electronically mailed to:**

Jack Jones Leslie\_A\_Martin@cod.uscourts.gov  
Dean Martin Leslie\_A\_Martin@cod.uscourts.gov  
Attorney Yee jack.yee@cod.uscourts.gov jack.yee@cob.uscourts.gov

**1:02-cr-12-1 Notice has been mailed by the filer to:**

Robert E. James  
123 19th St.  
Denver, CO

David Lane  
Killmer & Lane, LLP  
1543 Champa Street  
#400  
Denver, CO 80202

The following document(s) are associated with this transaction:

**Document description:**Main Document  
**Original filename:**n/a  
**Electronic document Stamp:**  
[STAMP dcecfStamp\_ID=1071006659 [Date=7/2/2007] [FileNumber=71919-0] [1634fbbc9cc1432519f4684c28eefbe469aa7e06ec707c7427c5e1fd1d657456731f674a211bf8d61b3754e6f15615a51e7b5b4f47573a117064243f837d45a]]

**Document description:**Proposed Order (PDF Only)  
**Original filename:**n/a  
**Electronic document Stamp:**  
[STAMP dcecfStamp\_ID=1071006659 [Date=7/2/2007] [FileNumber=71919-1] [87fa9a5c338d18e3c6bb6b10f66be4bcffbb75f7f26f5a78331ff0ef1db70b98e1c07dfc22c2763daa46fcc7af102de416891f66dfe5c90e30f992318ef552]]

Receive the Notice of Electronic filing (NEF)

- The NEF confirms that ECF has registered your transaction and the document is now an official court document.
- **Note: The Notice of Electronic Filing is your proof of filing and the official file mark. You should always print and save a copy of the Notice of Electronic Filing.**
- After a document is electronically filed, ECF a Notice of Electronic Filing (NEF) to the designated attorneys and parties who have 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 and the docket sheet to verify that the document was properly docketed.


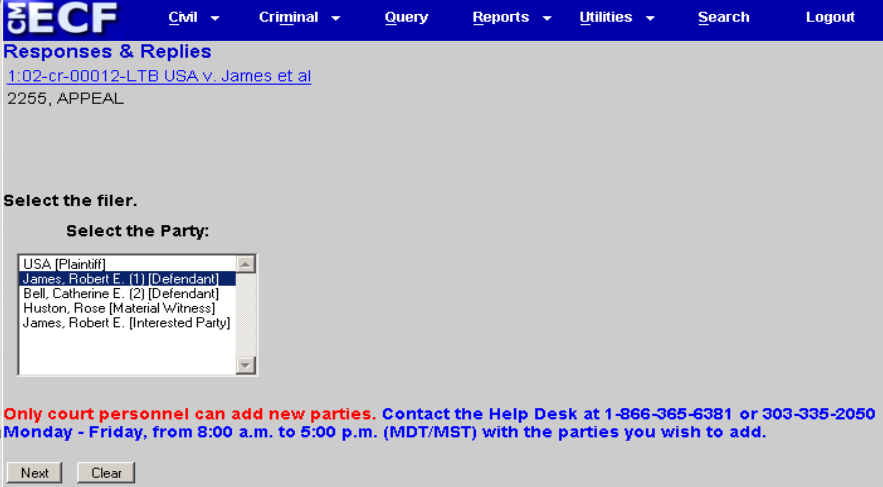
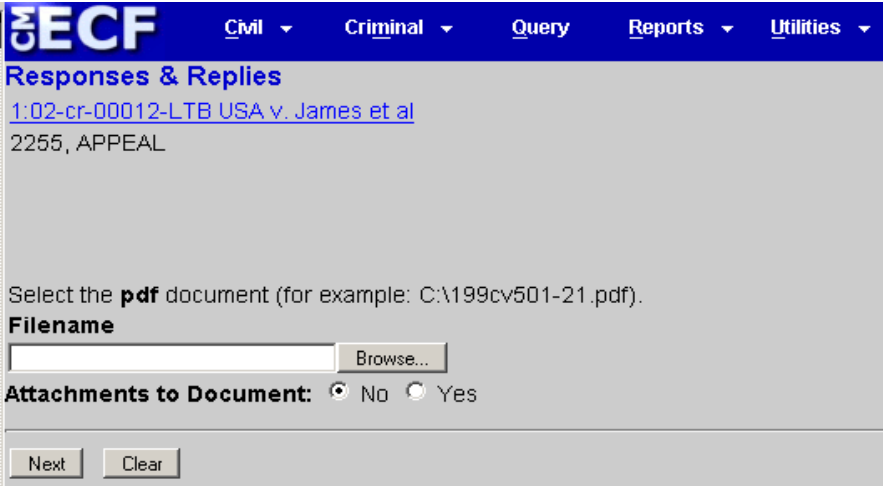
**Frame 9-30**

**Note: Users may not use the court’s electronic notice facilities for parties listed in the “Notice has been mailed by the filer to:” section. The user filing the document is required to serve these documents in paper format in accordance with the rules. Only users listed in the “Notice will be electronically mailed to:” section have consented to receive notice electronically.**

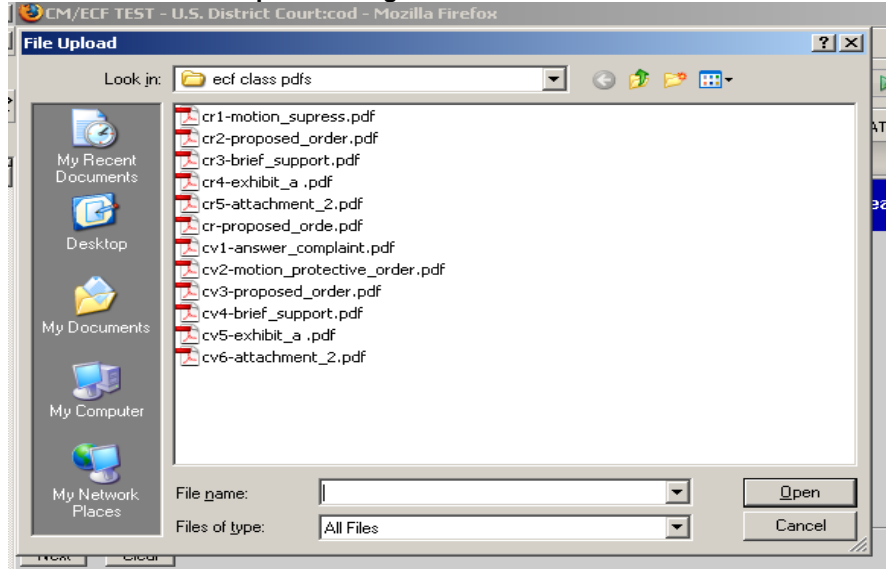
**Filing a Brief in Support of a Motion**

As a further illustration, we’ll file a brief in support of a motion. Since this repeats screen samples from the previous example, the format for this example is presented in a more concise presentation.

<p><b>Frame 9-31 Criminal filing categories</b></p>	<p>Selecting Supporting Documents, Responses and Reply Events</p> <ul style="list-style-type: none"> <li>• A list all of the criminal filing categories are displayed.</li> <li>• Click on the <a href="#">Supporting Documents, Responses and Replies</a> link under <b>Motions and Related Filings</b>.</li> </ul>
<p><b>Frame 9-32 Selecting Brief in Support of Motion</b></p>	<p>Selecting Supporting Documents, Responses and Reply Events</p> <ul style="list-style-type: none"> <li>• A list all of the events are displayed alphabetically.</li> <li>• In the search text box, you can enter the beginning letters of the motion event you want to select.</li> <li>• You may also scroll up/down the scroll bar in the “Available events” list to facilitate your selection of motion events.</li> <li>• After selecting the <b>Brief in Support of Motion</b>, click on the <b>[Next]</b> button.</li> </ul>
<p><b>Frame 9-33</b></p> <p><b>Note:</b> ECF defaults to the last case from which you queried or docketed in. Ensure the proper case number is entered in this field to avoid filing your document in the wrong case.</p>	
<p><b>Frame 9-34 Enter case number</b></p>	<p>Enter case number</p> <ul style="list-style-type: none"> <li>• Enter the number of the case for which the document is being filed</li> </ul> <p><b>Remember</b>, if you click on the main case number, it indicates you are filing for <b>all</b> of the defendants in the case.</p> <ul style="list-style-type: none"> <li>• When there is a <b>+</b> next to the short title, it indicates there is more than one defendant in the case. If you are filing specifically for one of the defendants, you <b>MUST</b> click on the <b>+</b> to expand the list to show all of the defendants' cases so you can select the correct defendant.</li> <li>• After clicking the appropriate case, click on the <b>[Next]</b> button.</li> </ul>

<p><b>Frame 9-35</b></p> 	<p>Review Screen</p> <ul style="list-style-type: none"><li>• After clicking on the <b>Next</b> button, from the enter/select case screen, a review screen is displayed.</li></ul> <p>Click on the <b>Next</b> button to continue</p>
<p><b>Frame 9-36 Designating the filing Party</b></p> 	<p>Designating the filing party</p> <ul style="list-style-type: none"><li>• Highlight the name of the party for whom you are filing the document. If you represent more than one party, select multiple parties by holding down the <b>[CTRL]</b> key while pointing and clicking on each party you represent.</li><li>• If done correctly, each party selected will remain highlighted.</li><li>• After highlighting the parties to the document, click on the <b>[Next]</b> button</li></ul>
<p><b>Frame 9-37</b></p> <p><b>Note:</b> If the list depicted does not display the party or parties a user represents, contact the Help Desk at 1-866-365-6381 or 303-335-2050 Monday thru Friday, from 8:00 a.m. to 5:00 p.m. (Mountain Time) with your party's information. Only court personnel can add or create new parties to a case. If you click on the Add/Create New Party hyperlink, ECF returns an error message advising you of this restriction.</p>	
<p><b>Frame 9-38 Attaching the main PDF document</b></p> 	<p>Attaching the main PDF document</p> <ul style="list-style-type: none"><li>• CM/ECF will display the PDF selection screen to allow you to attaché the main PDF document.</li><li>• If you have attachments to the main document, you can indicate so by clicking on the <b>Yes</b> radio button for <b>“Attachments to Document”</b></li><li>• Click the <b>[Browse]</b> button.</li></ul>

**Frame 9-38 The File Upload dialog Box**

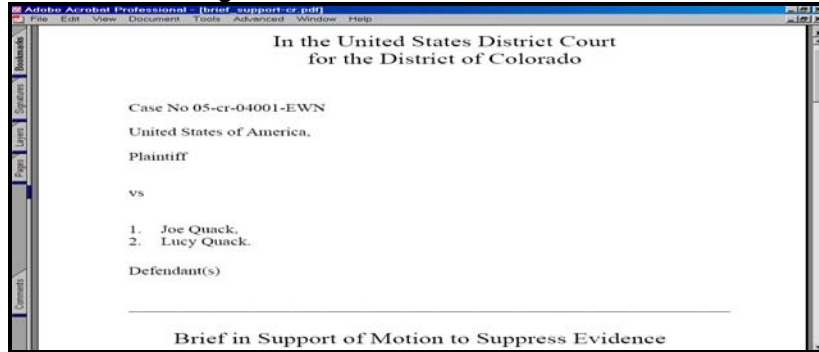


File Upload dialog box

- The Choose File/File Upload dialog box will appear and you can navigate to the folder (or location) where you have the PDF document.
- The court highly recommends you right click and open the document up in Adobe Reader (or Adobe Acrobat) to view the PDF document to ensure it is the correct PDF document you wish to file.
- Each PDF attached is limited to a file size limitation. Your total filing of the main document and attachments may exceed the per document limit.

**NOTE:** Please refer to the [Court Information](#) link from the CM/ECF start page or from the utilities menu for the file size limits of a PDF document.

**Frame 9-39 Viewing the PDF document**



Viewing the PDF document

- When viewing the PDF document, check the document for items such as:
  - court
  - case number and style
  - parties
  - correct document

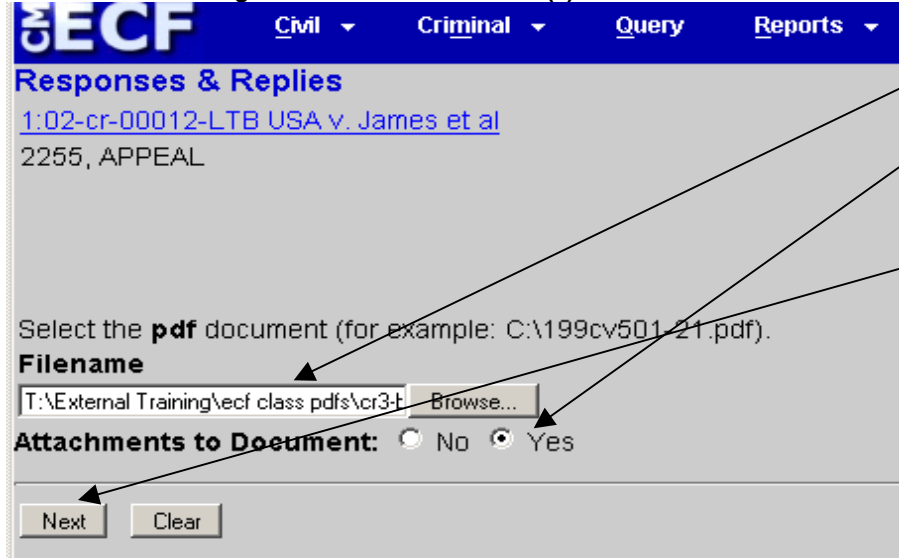
- The signature (i.e. s/ and the attorney name

- After viewing the PDF document, close the Adobe application.

- Click on the **[OPEN]** button to populate the entry box for the filename.



**Frame 9-40 Attaching additional PDF document(s)**



Attaching additional PDF document(s)

- The Filename box is now filled with the name of the main document.
- If there are attachments to the main document, click on the **[yes]** radio button.
- Click the **[NEXT]** button.

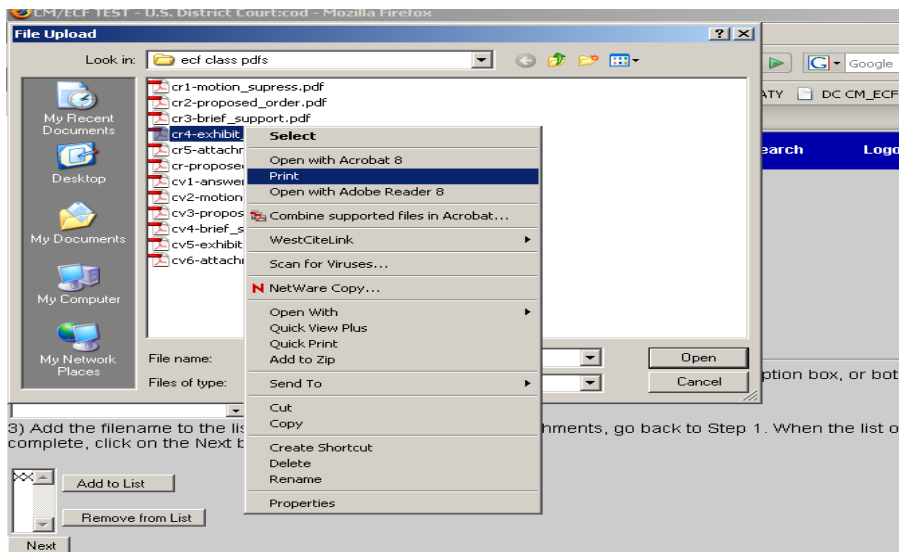
The Additional attachment screen

**Frame 9-41 The Additional attachment screen**



- The attachment screen is displayed
- Click the **[Browse]** button.

**Frame 9-42 The Choose file dialog box**



The Choose file dialog box

- The Choose File dialog box will appear and you can navigate to the folder (or location) where you have the PDF document.
- The court highly recommends you right click and open the document up in Adobe Reader (or Adobe Acrobat) to view the PDF document to ensure it is the correct PDF document you wish to file.

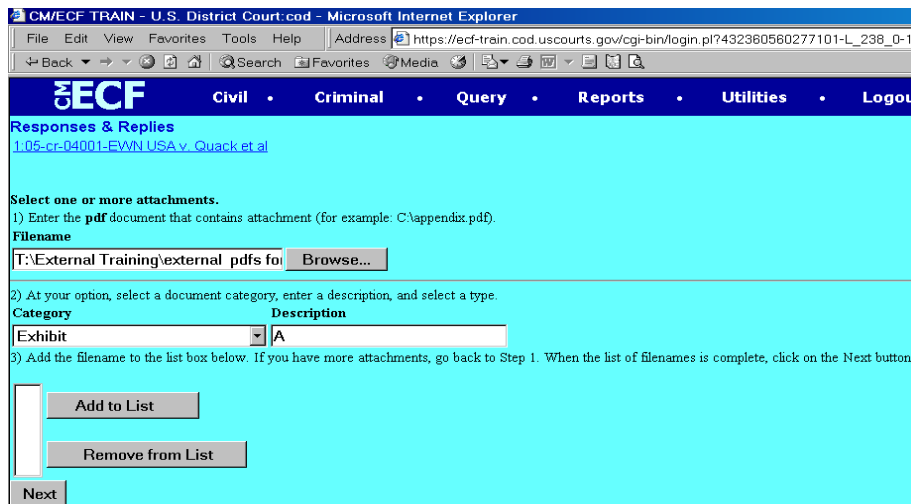
**Frame 9-43**

**Note:** These examples do not display the PDF documents for the sake of brevity. The court highly recommends you ALWAYS view the PDF document(s) and any attachments to ensure you are filing the correct documents in the ECF application.

**Frame 9-44**

**Note:** These examples do not display the PDF documents for the sake of brevity. The court highly recommends you ALWAYS view the PDF document(s) and any attachments to ensure you are filing the correct documents in the ECF application.

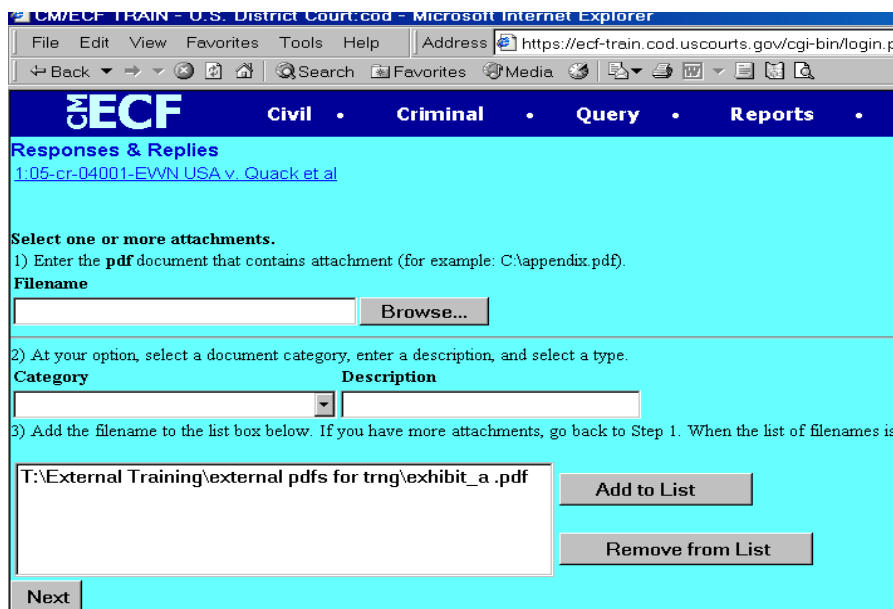
**Frame 9-45 Selecting the category descriptor**



Selecting the category descriptor

- The Filename entry box should be filled in with the attachment.
- Under the Category entry box, there is a drop down arrow to allow you to select the type of attachment it is.
- Click on the drop down arrow to see the list of attachment types. If the type does not fit the attachment, select the blank entry.
- You can enter a description to provide additional information.
- For example, if you have to break up an exhibit, you can enter the page numbers of the exhibit being submitted. In the Description field you can enter Pages 1 – 30 of Exhibit A.

**Frame 9-46 Repeating the process for additional attachments**



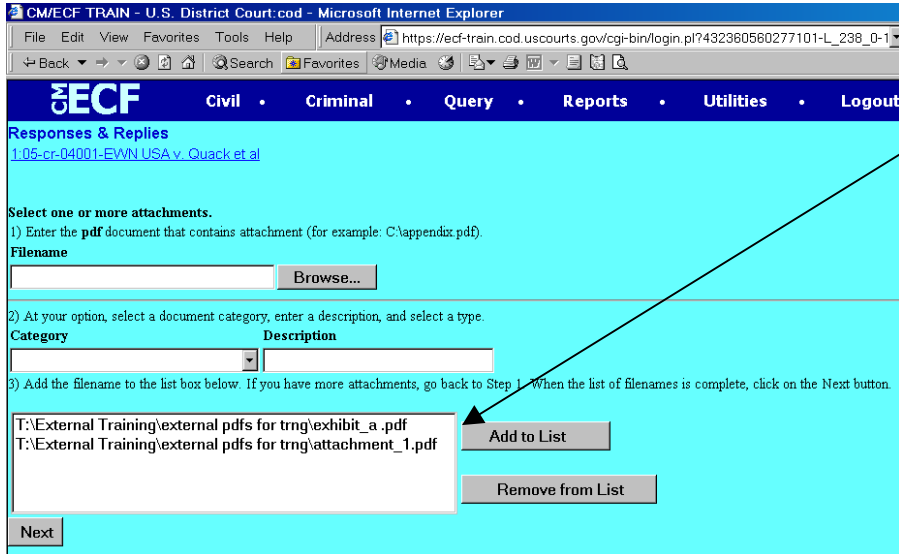
Repeating the process for additional attachments

- Click on the **[Add to List]** button.
- The filename of the attachment is displayed in the list box.
- **Repeat** the steps above to add additional attachments.
- Click the **[NEXT]** button.

**Frame 9-47**

**Note: Repeat Frames 41 through Frame 45 for the second and succeeding attachments. In this illustration, there are two attachments. The next frame illustrates what the final attachment list will look like.**

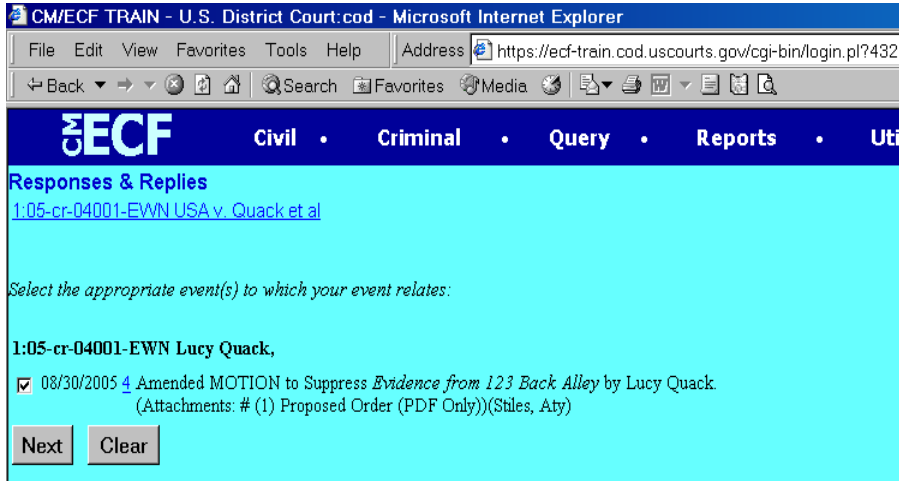
**Frame 9-48 Final list box of attachments**



**Final list box of attachments**

- The final attachment screen displays the two attachments,
  - Exhibit A
  - Attachment 1
- Click the **[NEXT]** button.

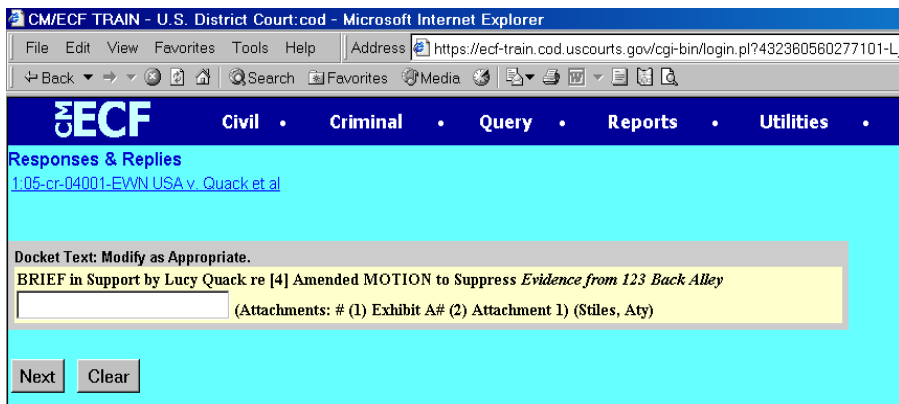
**Frame 9-49 Linking the Brief in Support to the motion**



**Linking the Brief in Support to the motion**

- Additional ECF Information
- This window allows the filer to link the brief with other documents that have been filed already. A list of previously filed documents appears. Documents such as briefs in support of a motion must link back to the motion.
- Using the mouse, select by clicking in the checkboxes provided, which documents you wish to link the brief to. Click on **[Next]**.

**Frame 9-50 Modify Docket text, as necessary**



**Modify Docket text, as necessary**

- The Docket Text modification screen is displayed.
- This screen allows you to enter **optional** docket modification text.
- After enter text or leaving blank, click on the **[Next]**



**Frame 9-51 Submit the Transaction to ECF**

Submit the Transaction to ECF

- **THIS IS THE “LAST” SCREEN FOR YOU TO REVIEW!!**
- If you click the **NEXT** button, the transaction is posted to the database.
- Click on the **[Next]** button to commit the transaction.

**Frame 9-52**

**Note:** At any time prior to this step, you can abort the ECF filing by simply clicking on a menu item on the blue menu bar, including logging out of the system. Users should avoid using the [Back] button in complicated transaction, as it is easier to just start over. When using the [Back] button, a user may not use the [Forward] button on the web browser when the corrections have been made. Progression must be made using the ECF buttons.

**Frame 9-53 The Notice of Electronic Filing (NEF)**

The Notice of Electronic Filing (NEF) is

- The **Notice of Electronic Filing (NEF)** is displayed.
- This is your “receipt” of the filing.
- If there are name(s) and addresses displayed below the **“Notice has been mailed by the filer to:”** you must print a copy of the NEF and mail along with the document(s) you filed to the parties displayed.
- In this example, there are none displayed.
- You will generally see names and addresses for pro se parties and attorneys that may not be registered to be an e-filer.



ECF filing is that simple!

### **Submitting a Proposed Order**

Registered users are required to submit proposed orders as PDF attachments to the motions requesting the relief to be ordered. The user shall also submit the proposed order in a WordPerfect or text (\*.txt) format to the judicial officers assigned to the case. The proposed order shall be sent via e-mail to the chambers of the assigned district judge and magistrate judge. Users should review the proposed orders sections of the ECF Procedures for the District of Colorado for more information and for chambers e-mail addresses.

### **Sealed Document Submission**

The filing of sealed documents is governed by Section VI of the ECF Procedures for the District of Colorado. Sealed document submission falls into two categories, documents in sealed cases and sealed documents in public cases.

### **Sealed Case Document Filing**

A document filed in a sealed case must follow this procedure:

- The first document submitted in a sealed case by a party must be submitted in paper format.
- All subsequent documents should be filed electronically, unless the party has received different instructions from the court.
- Sealed documents may be viewed electronically by attorneys of record in the case by using the PACER system.
- All documents filed in a sealed case must be served in paper format. The court's electronic notice facilities will not be available on sealed documents.

### **Sealed Document Filing in Public Cases**

A sealed document filed in a public case must follow this procedure:

- A Motion to Seal must be submitted electronically in accordance with the Local Rules of this court.
- At the same time, the party should electronically submit the document under seal using the **Sealed Document** event. Parties should only submit sealed documents using the **Sealed Document** event. Any document submitted under a different event will not be sealed from public view.
- A Notice of Electronic Filing will be generated for the sealed document, but the document will not be viewable.
- Sealed documents may not be viewed electronically by attorneys of record in the case by using the PACER system. Attorneys of record may view the sealed document docket entry on the docket sheet.
- All sealed documents must be served in paper format. The court's electronic notice facilities will not be available on sealed documents.

All questions on sealed documents should be forwarded immediately to the ECF Help Desk.

### **Privacy Policy**

Documents with personal identifiers and other sensitive information should be filed electronically in accordance with the court's Privacy Policy. The Privacy Policy may be found in Section XI of the ECF Procedures for the District of Colorado.

### **Motion Practice**

Basic federal civil motion practice follows the listed filing progression: motion – response – reply. Users should make a point of following this practice when filing documents. A document filed by a party responding to the motion must be filed as a response. It should not be filed as a reply. A document filed by a party responding to a response is a reply. It is critical for users to choose the correct event for a document and to make sure the document name and event name match.

## **Appendix 1** **ECF Quick Reference Sheet**

### **Help Desk**

The ECF Help Desk for the District of Colorado is available Monday thru Friday, from 8:00 a.m. to 5:00 p.m. (Mountain Time)

Toll Free Number: 1-866-365-6381

Phone Number: 303-335-2050

E-Mail Address: [cod\\_cmecf@cod.uscourts.gov](mailto:cod_cmecf@cod.uscourts.gov)

### **Eight Basic Steps for Filing a Civil/Criminal Document in ECF**

1. Select the Type of Document to File
2. Identify the Case for Which the Document is Being Filed
3. Designate the Party for Whom the Document is Being Filed
4. Specify the PDF Document to File
5. Additional ECF Information
6. Modify the Docket Text as Necessary
7. Submit the Document to ECF
8. Receive the Notice of Electronic Filing

## Appendix 1

# ECF Quick Reference Sheet (Continued)

### Submitting an Initiating Document by E-Mail (New Cases)

- Create PDF versions of the Civil Complaint, Civil Cover Sheet (JS-44), and Summons forms (if appropriate).
- Create an e-mail addressed to the clerk's office e-mail address for new cases: [newcases@cod.uscourts.gov](mailto:newcases@cod.uscourts.gov).
- In the subject line of the e-mail indicate this is a new case by typing "new case" and the short case title (e.g. "New Case – Jones v. Smith).
- In the e-mail indicate how the party will be paying the filing fee.
- If the initiating party is requesting the issuance of a summons, the e-mail must state how the party would like the summons returned.
- Attach the PDF versions of the case initiating documents.
- Send the e-mail to the clerk's office.

*Initiating documents may also be submitted on CD, DVD or 3.5" disk(s) per the ECF Procedures. Please refer to the ECF Procedures for more information on submitting in those mediums.*

### User Data Quality Checklist

1. Review Docket Entry
  - Was the correct event used?
  - Does the title of the document match the docket entry?
  - Were the correct filer and attorney chosen?
  - Is the case number and case style on the document correct?
  - Was the document linked correctly?
2. Open and Review Document
  - Is the document legible?
  - Were the attachments added correctly and named properly?
  - Was the document filed in the correct case?
  - Is the case number and case style on the document correct?
  - Does the signature line contain the s/signature?

### Submitting a Proposed Order

Three copies of the proposed order must be submitted to the court:

- A PDF copy of the proposed order must be submitted as an attachment to the motion in ECF.
- A WordPerfect/Word copy of the order must be submitted by e-mail to the district judge.
- A WordPerfect/Word copy of the order must be submitted by e-mail to the magistrate judge.
- 

**NOTE: In criminal cases the proposed order is the PDF copy and one copy to the district judge. There is no magistrate judge in the criminal case.**

*The subject line of the e-mail for the e-mailed versions should contain the case number, the short title, the words "Proposed Order" and the docket number of the motion to which the proposed order relates (e.g. Joes v. Smith, case number, Proposed Order re Docket Entry #85).*

*ECF users should review Section V.L. of the ECF Procedures for the District of Colorado for more information and for the electronic mail addresses of the judicial officers.*

## **Appendix 2**

# **Ten Most Common Docketing Errors**

Listed below are the ten most common docketing errors made by users in ECF courts.

1. **Attachments and Exhibits**
  - These documents should be filed in accordance with the practices set down in the ECF Procedures.
2. **Select the Proper Event**
  - An event list is attached to this document and a report showing current events is available within ECF.
  - Please carefully review your choices before filing. It is important to choose the correct event.
3. **Know when to use your ECF login/password vs. the PACER login/password.**
  - The ECF login/password is used to file documents.
  - The PACER login/password is used to view docket sheets, use the query function, and use the reports.
4. **Include a Certificate of Service on All Documents**
  - A certificate of service, even when serving electronically, is required under the ECF Procedures.
5. **Proposed Orders**
  - Proposed orders must be submitted as PDF attachments to the docket entry in ECF and must be e-mailed to the district and magistrate judges on a case in WordPerfect or WORD format. See the ECF Procedures
6. **Open All PDF Documents Before Attaching**
  - Before attaching a document to an ECF entry, review it to make sure the correct document is being attached.
7. **The Login and s/signature on a Document Must Match**
  - Make sure the s/signature on a submitted document matches the login and password of the attorney filing it.
8. **Place an s/signature on all Documents**
  - The s/signature must be placed on all documents.
9. **Each Document Should be Filed Separately in ECF**
  - All documents should be filed separately. For example a brief in support of a motion would not be docketed as an attachment to the motion, but as a separate document.
10. **Choose the Correct Party When Docketing a Document**
  - Be sure to choose the correct party you are filing a document on behalf of.

## Appendix 3

# CM/ECF Version 3.1 – Cascading Menus

The implementation of Version 3.1 of CM/ECF provides another method to navigate and select menu functions. Prior to Version 3.1, a user clicked on the main category from the blue Menu Bar, then clicked on a filing category, such as “Motions”, then the list of motions would be displayed.

Starting with Version 3.1, the Blue Menu bar has been changed to provide a “drop-down” list to facilitate navigation to specific even screens.

<p><b>Frame A3-1 Screen 1 - Main start screen</b></p>	<p><b>Screen 1</b></p> <ul style="list-style-type: none"> <li>• Prior to Version 3.1, a user had to click on several links and navigate through several screens to get to the event screen.</li> <li>• For demonstration purposes, lest navigate to the motion event.</li> <li>• The <b>first</b> screen is the main menu screen. We start by clicking on <b>Civil</b> on the Blue Menu bar.</li> </ul>
<p><b>Frame A3-2 Screen 2 - Civil Events Category List</b></p>	<p><b>Screen 2 –Civil Event Category List</b></p> <ul style="list-style-type: none"> <li>• After clicking on the <b>Civil</b> option from the main menu, a second screen is displayed – Civil Events Category List to allow the user to select the event category they wish to file, i.e. motions, answers, etc.</li> <li>• Next, click on the <b>Motions</b> link.</li> </ul>
<p><b>Frame A3-3 Screen 3 – The Motion Event Screen</b></p>	<p><b>Screen 3 –Motion Event Screen</b></p> <ul style="list-style-type: none"> <li>• After clicking on the <b>Motions</b> link, the Motion Events are now displayed.</li> </ul>

**Frame A3-4 Summary**

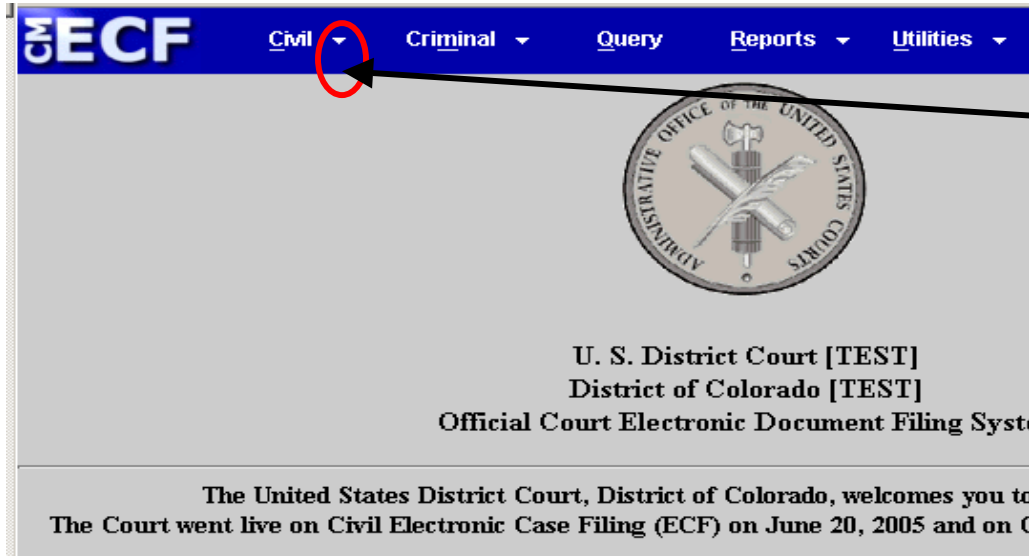
Prior to Version 3.1, the user's only option was to click on the various links to navigate through several screens to get to the screen they wanted to use.

**Frame A3-5 Version 3.1 Navigation**

With the release of Version 3.1, context sensitive cascading menus have been provided to allow the user to quickly navigate to a specific screen without having to go through several screens. Depending on where the user is trying to navigate to, the use of these cascading menu lists will reduce the number of screens a user must navigate through.

**Let's compare!!**

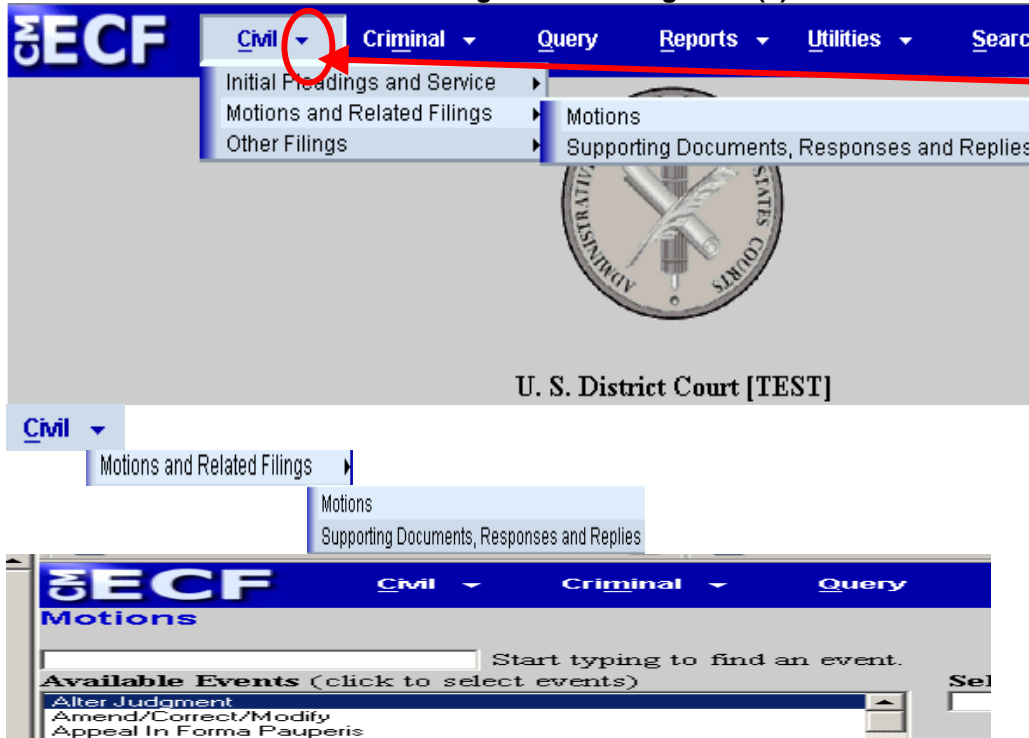
**Frame A3-6 Main start screen**



Ver. 3.1 – Main Start Screen

- Version 3.1 provides a drop down arrow next to the menu category (i.e. Civil) that will display cascading menu(s) to allow the user to select the specific option they wish to navigate to.

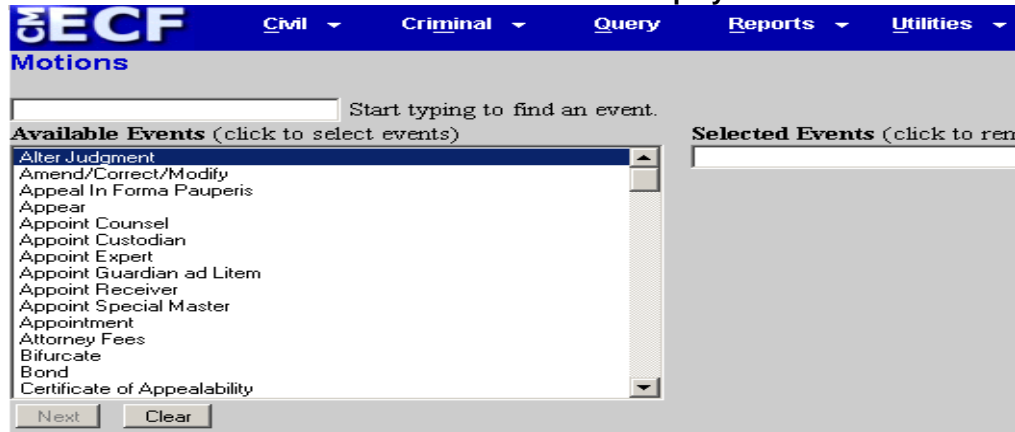
**Frame A3-7 Main start screen showing the cascading menu(s)**



Making the selection

- The user should hover the mouse over the drop down arrow next to **Civil**.
- When the mouse is over the arrow, the first menu is displayed.
- Next, you can hover the mouse over the **Motions and Related Filings** which will then display the categories under the **Motions and Related Filings** option which are **Motions** and **Supporting Documents, Responses and Replies**.
- Now click on **Motions**.
- The Motions event screen is now displayed.

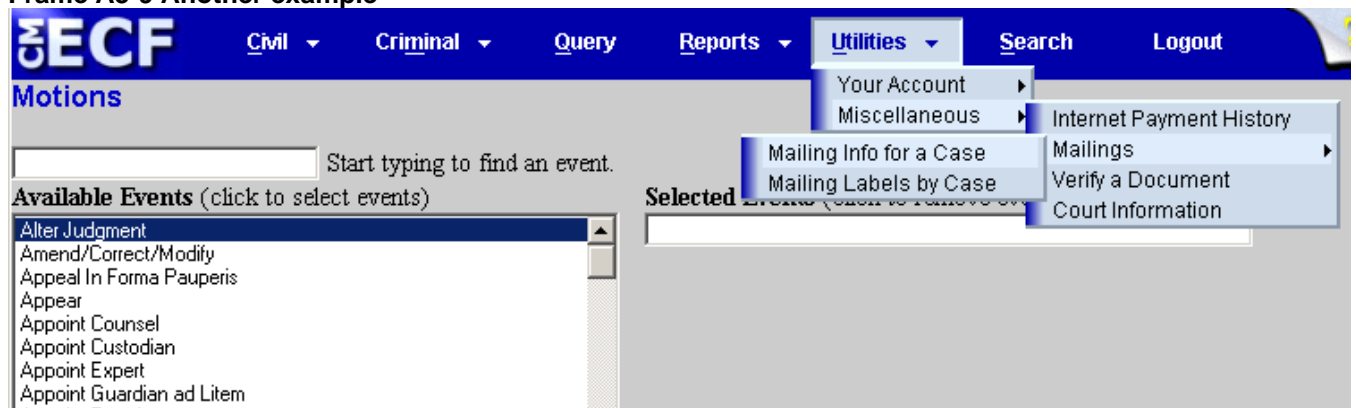
**Frame A3-8 The Motions Event list screen is now displayed**



The Motions Event List

- You can now enter the search for the motion you want or scroll up/down the list of events.
- By using the cascading menus in this example, we bypassed one screen.
- It doesn't appear to be much, but over the process of performing several docketing entries and or other navigation, the number of screens bypasses can be significant.

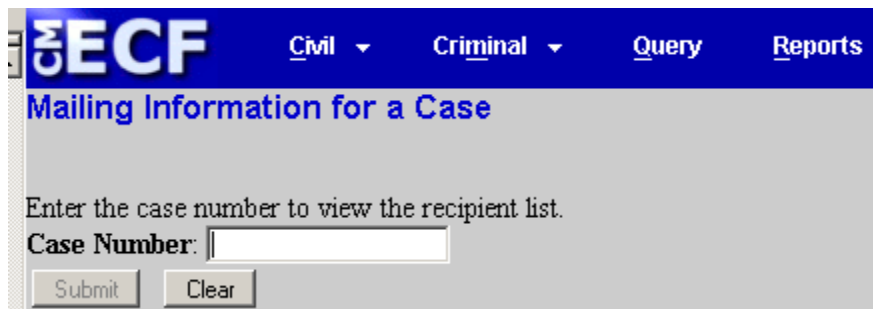
**Frame A3-9 Another example**




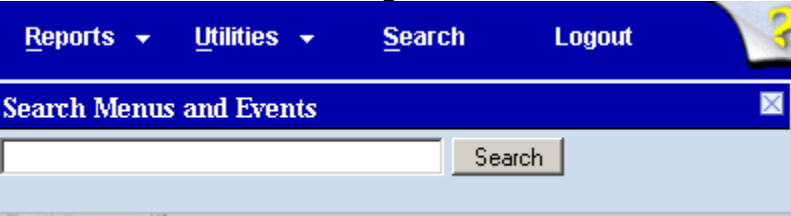
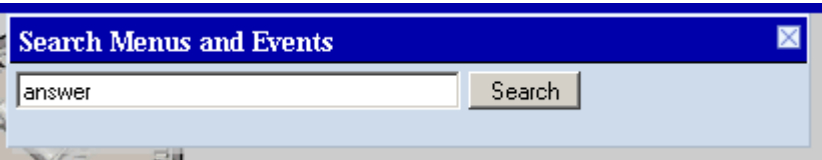

While in the Motions- Events List screen, we wanted to go to **Utilities** to check **Mailing info**. From the Motions- Events List screen, we go to the

1. **Utilities** option on the blue menu bar, hover over the drop down arrow, to see the **Utilities** options  
Your Account  
Miscellaneous. Again, when you hover the mouse over the **Miscellaneous** option, the following  
Internet Payment History  
Mailings  
Verify a Document  
Court Information  
is displayed. Finally, we can hover the mouse over **Mailings**  
**Mailing Info for a Case**  
and see **Mailing Labels by Case**. When you select/click on **Mailing Info for a Case**,

the Mailing Info for a Case is displayed and is ready for the case number to be entered.



We bypassed Three screens to navigate to this screen.

<p><b>Frame A3-10 The Search Feature</b> A new feature in Version 3.1 is the ability to <b>search</b> for a <i>menu</i> or an <i>event</i>.</p>	
<p><b>Frame A3-11 – Search example</b></p> 	<p><b>Search</b></p> <ul style="list-style-type: none"> <li>Click on the <b>Search</b> option on the blue menu bar.</li> </ul>
<p><b>Frame A3-12 The Search dialog box</b></p> 	<ul style="list-style-type: none"> <li>A search dialog box is displayed, allowing for the entry for the search.</li> </ul>
<p><b>Frame A3-13 Entering search word(s)</b></p> 	<p><b>Searching</b></p> <ul style="list-style-type: none"> <li>For example, we want to search on “answer”.</li> <li>A search dialog box is displayed, allowing for the entry for the search.</li> </ul>
<p><b>Frame A3-14 Search Results Screen</b></p> 	<p><b>Search Results</b></p> <ul style="list-style-type: none"> <li>Whatever menus and events are found that contain the letter(s) or words of your search are displayed.</li> <li>The display is categorized by Menu and event categories.</li> </ul>