CM/ECF
Version 4.0

Documentation for Attorneys

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Filing Changes

Selecting the Filer

When selecting the filer of the document during filing, a screen appears with party information displayed on the left side of the screen (left pane) and a filer pick list on the right side of the screen (right pane). The right pane displays the existing parties and the left pane displays a case participant tree which allows filing users to readily see all case participants during the process of selecting the filers. All party selections will be made in the right pane.

To select the filing party, click on the name of the party name in the right pane of the screen, or, if the **Select a Group** option is presented and you represent all defendants or all plaintiffs you may select a group by clicking in the circle next to the group. To add a new party, the user should click the **New Filer** button located in the right pane. A new search screen will be displayed from which the user then can search for and add a new party.

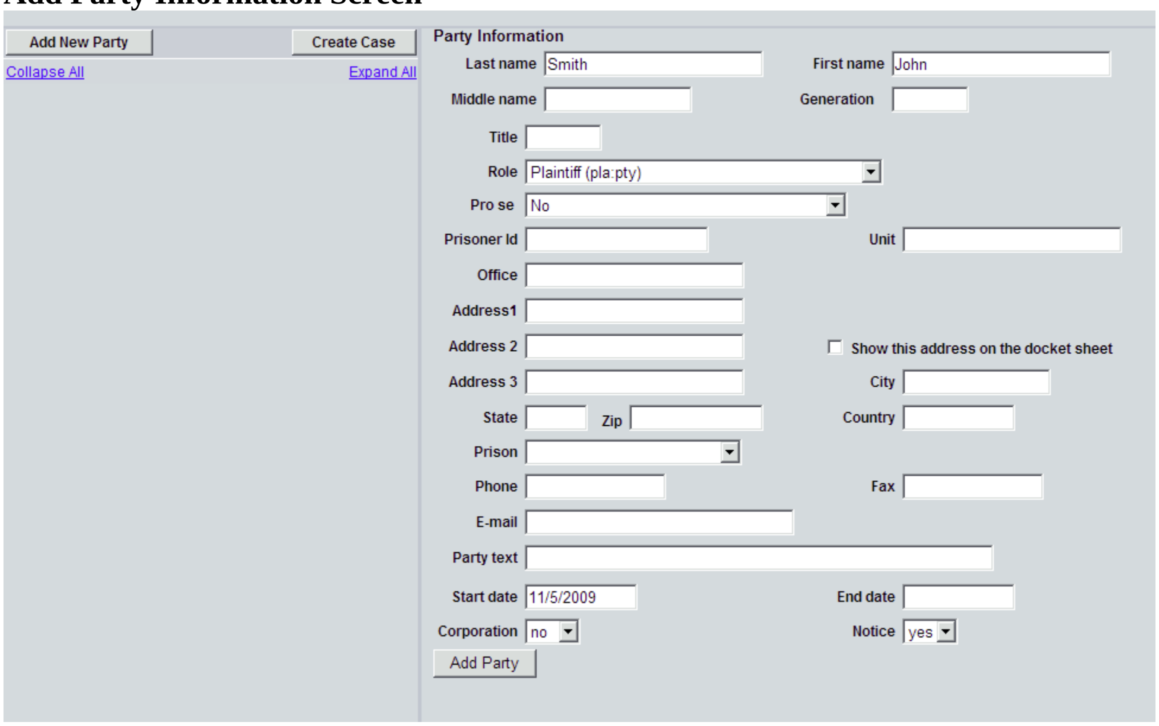
Filing– Select the Filer Screen

Filing Changes

Adding a Party

To add a new party in a civil case, the user should click the **New Filer** button located in the right pane. A new search screen will be displayed from which the user can then search for and add a new party. To search for a new filer, type in the party's first and last name, or if a business, the business name. Be sure to scroll down through the list of names that come up on the screen. If the system finds the correct name, select the name already in the database to eliminate different versions of the same party name. If no match is found, click the **Create New Party** button and complete the Last Name, First Name and, if applicable, add the Middle Name and Generation fields. **Do not enter a party's address.** Select the correct **Role** (i.e., plaintiff, defendant, movant, etc.) of the party and click the **Add Party** button

Add Party Information Screen



After searching for, selecting, and adding a filer, the filer's name appears in the participant tree, is added to the party pick list, and is highlighted in the list on the right side of the screen. The user can either:

- Add an alias by clicking on the corresponding "add" icon,
- Edit the party information by clicking on the pencil "edit" icon,
- Delete the party by clicking the red X "delete" icon, or
- Add a new party by clicking on the ***Add New Party*** button at the top left of the screen.

Filing Changes

Adding a Party (Cont'd)

When a new party is added, the party is added to the party pick list and highlighted in the list in the right pane of the screen while also adding the party to the participant tree in the left pane of the screen. To add more parties, repeat this process. Parties that are added to civil cases during docketing will have control icons in the participant tree so the filing user can add aliases for the party during this process. **There are no icon controls for existing case participants in the participant tree during docketing.** Attorneys may link themselves to a party but may not add other attorneys to the docket sheet.

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

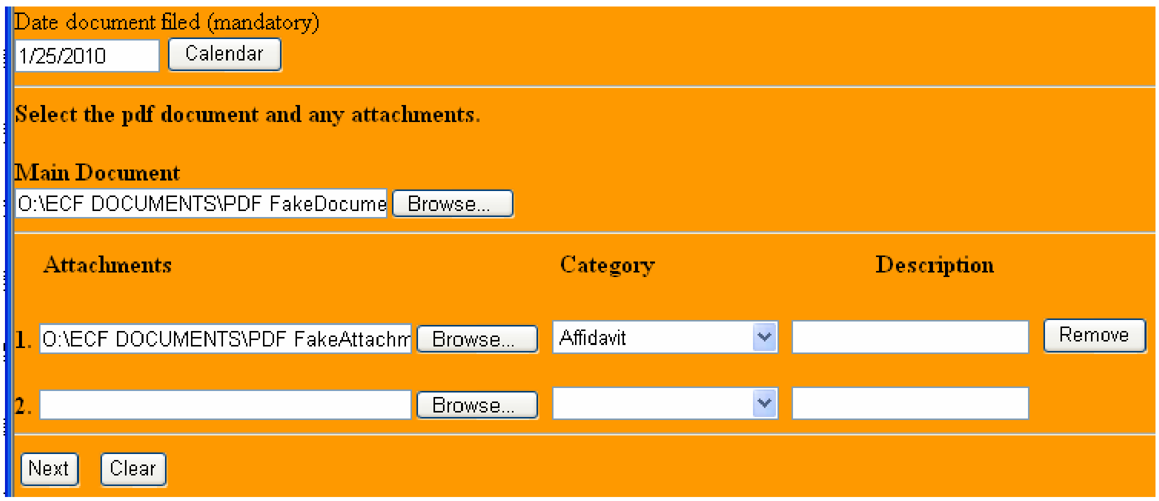
Icon	Description
	**Delete this party from the case.**
	**Add new alias or attorney.**
	**Copy attorney(s) from other parties in the case to this party.**
	**Edit the party, alias, or attorney. Only displays beside actual names of participants, so if no participant has been added, this icon is suppressed.**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

Additionally, the **+** and **–** icons for each branch expand or collapse the branch, respectively. The **Expand All** hyperlink displays all participants in the case, once they are added. The **Collapse All** hyperlink displays only the parties in the case, with the other participant information collapsed in the tree. The **Pick Filer** button brings the party list back if the user searches for a party but decides not to add one.

PDF Documents and Attachments

Uploading PDF Documents and Attachments

The process of adding a main document and attachments during docketing has been streamlined to only require one screen. Instead of having to select the *Yes* radio button on the main document upload screen to add attachments, attachments can now be added on the same screen as the main document.



Information with respect to attachments:

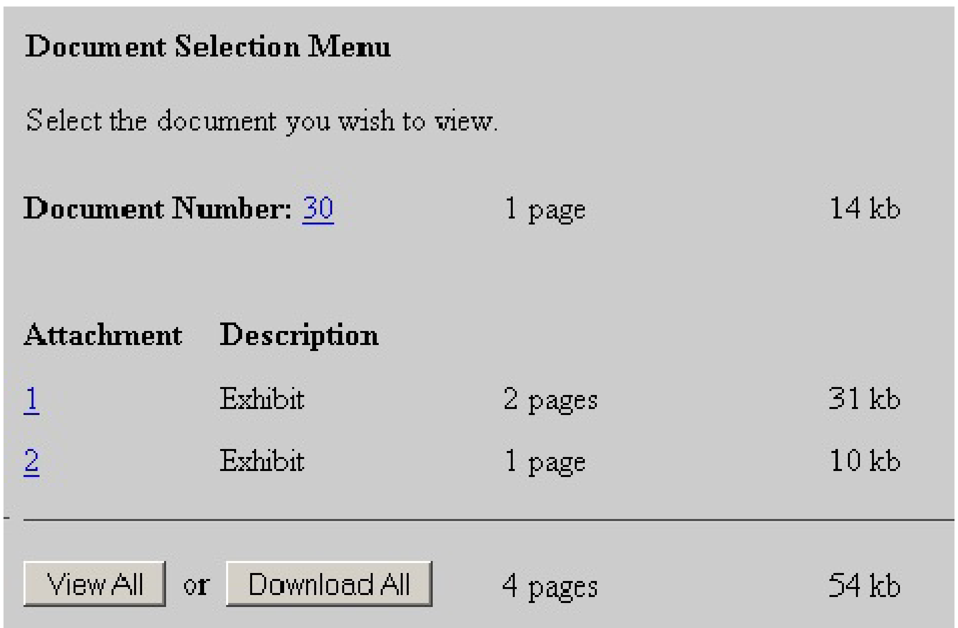
- Click the *Browse* button to upload the attachment.
- A new row will appear each time you upload an attachment and enter the necessary category or description.
- A category or description must be entered. Failure to include either a category or a description will result in an error message.
- When finished adding attachments, leave the last attachment space blank.
- Click the *Remove* button to remove an attachment.
- Click the *Browse* button to replace the file with another for the attachment.
- Click the *Clear* button to return the screen to its original default state.

PDF Documents and Attachments

Viewing PDF Documents and Attachments

When viewing a document with attachments, the following changes have been made to the document selection screen:

- The main document number will serve as the link to the **main document**.
- Each attachment to the main document will be sequentially numbered starting with the number 1.
- The file size for each attachment, as well as the total file size of all of the attachments and the main document combined will be displayed.



File Size Limitation

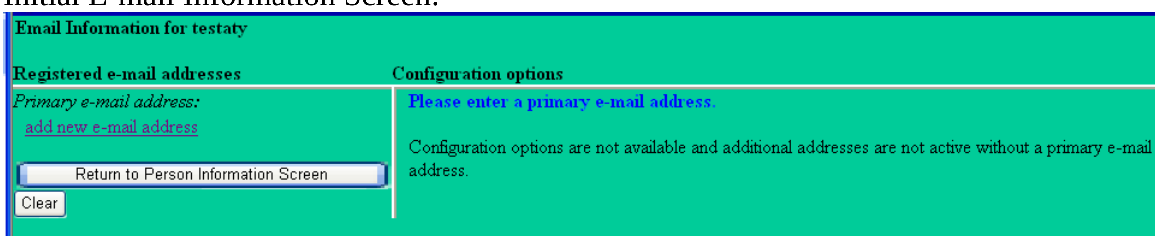
When a PDF document that is larger than the set document file size limit is uploaded during docketing, the error message now includes the file size of the current PDF document.

<u>Maintain Your E-Mail Information</u>

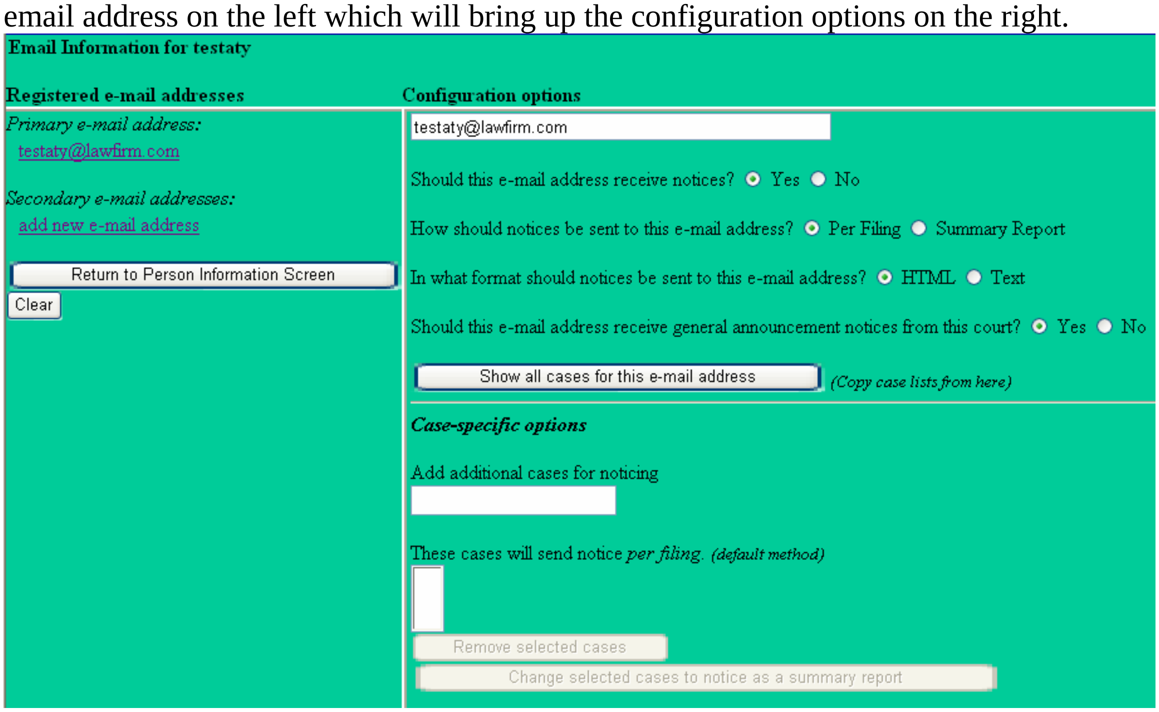
The Eastern District of Virginia allows attorneys to modify their email addresses and settings. The E-mail Information screen in *Maintain Your Email* has been modified to provide more streamlined functionality. Additional options are now presented to the user. Cutting and pasting multiple case numbers from one delivery method to another is now allowed.

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

Initial E-mail Information Screen:



Once the user enters a complete email address, configuration options appear under the email address on the right side of the screen. To access the configuration options for existing email addresses (listed on the left side of the screen), the user should click on the email address on the left which will bring up the configuration options on the right.



Maintain Your E-Mail Information

Configuration Options for e-mail addresses:

Option	Description
Should this e-mail address receive notices?	For the primary e-mail address, the default is **Yes**. It is not recommended that you change this response to **No**. If you change this response to *No*, then the primary e-mail address will **not** receive notices of electronic filing (NEFs).
How should notices be sent to this e-mail address?	Sets the default delivery method for notices sent to this address. If **Per Filing**, an e-mail will be sent for each individual NEF. If **Summary Report**, one daily summary email notice that lists all the filings for that day will be sent; if this option is selected, an additional option is added to the screen: *Should this e-mail address receive a "no activity" notice when no summary noticing occurs?* If **Yes**, the Daily Summary Report email will include the message *"no transactions found for this time period"* when no activity occurs in the cases for which the user is configured to receive summary notices. If **No**, then no email will be generated when there is no activity in the cases
In what format should notices be sent to this e-mail address?	Controls the format of the e-mails – either HTML or Text.
Should this e-mail address receive general announcement notices from this court?	If **No**, the user will not receive general court announcement e-mail message unless the court overrides the user's preference (e.g., the message is urgent and must be sent to all users).
Show all cases for this e-mail address.	Displays a list of all of the cases for which the user is configured to receive NEFs.

Maintain Your E-Mail Information

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

Example of additional cases added to the default method of service.

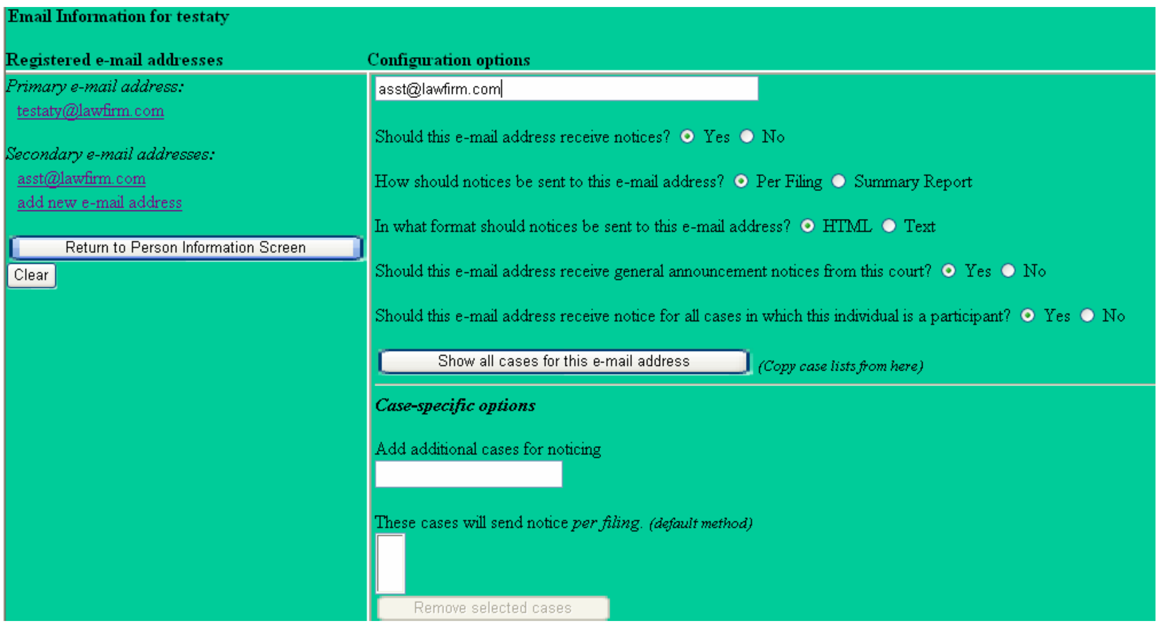
To move cases from the default method list to the alternate method list, the user should click the case number(s) in the primary list and then click the *Change selected cases to notice as a summary report* button (if summary noticing is the default method, then this button will be labeled *Change selected cases to notice per filing*). The case(s) will be moved to the alternate method list. To delete cases from the default method list or the alternate method list, select the case(s) and then click the *Remove selected cases* button.

Example of the result after changing selected cases from the default method of service to the alternate method.

<u>Maintain Your E-Mail Information</u>

Adding a Secondary E-mail Address

To add a secondary e-mail address, click the *add new e-mail address* link under *Secondary e-mail addresses.* In addition to the configuration options for the primary e-mail address, the option *Should this e-mail address receive notice for all cases in which this individual is a participant?* appears in the Configuration Options section of the screen. The user can answer **Yes** or **No**. If you want the secondary e-mail address to receive notices in all of your cases, then select *Yes.* If you want the secondary e-mail address to receive notices for one or more cases, then select *No*. Follow the instructions under *Case Specific Options* to add one or more cases to the secondary e-mail address.



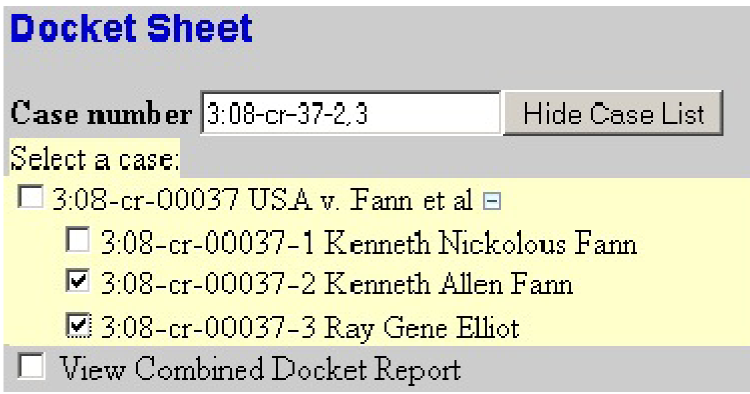
Removing or Modifying a Secondary E-mail Address

To remove or modify a secondary e-mail address, the user should click on the e-mail address on the left side of the screen. This will cause the e-mail address to display in a text field on the right side of the screen, along with all the configuration options and case lists (if any) associated with the e-mail address. The user should delete the e-mail address from the text field to remove the e-mail address or modify the address in the text field. To change the e-mail address to a different one, the user should immediately type the new address in the text field before clicking anywhere outside the text field. If the user should click outside the text field without entering a new e-mail address, the configuration options will disappear from the screen and the previous e-mail address and settings will be removed.

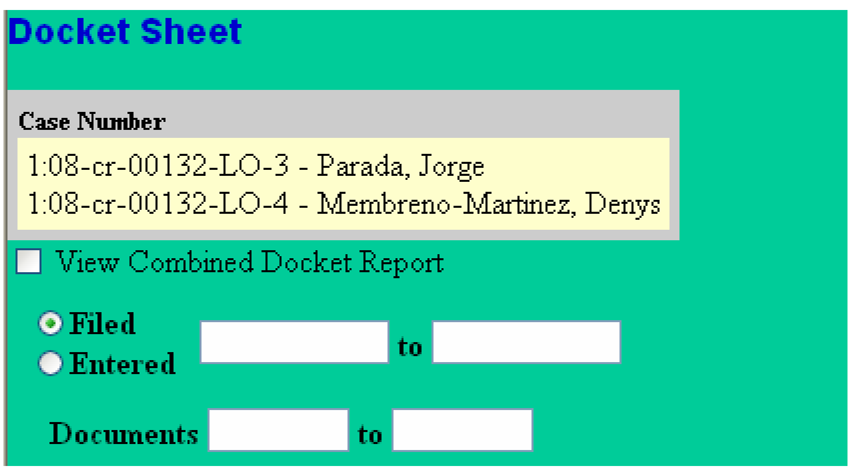
Docket Report

Combined Criminal Docket Sheet

A combined docket report can now be run for a selection of defendants in a multi-defendant criminal case. A new ***View Combined Docket Report*** checkbox will be displayed beneath the case number list when a multi-defendant case number is entered, and only after two or more of the criminal defendants are selected. The combined docket sheet will display all of the party and attorney information at the top of the docket report while the combined proceedings of the selected defendants will be displayed in the main section of the report.



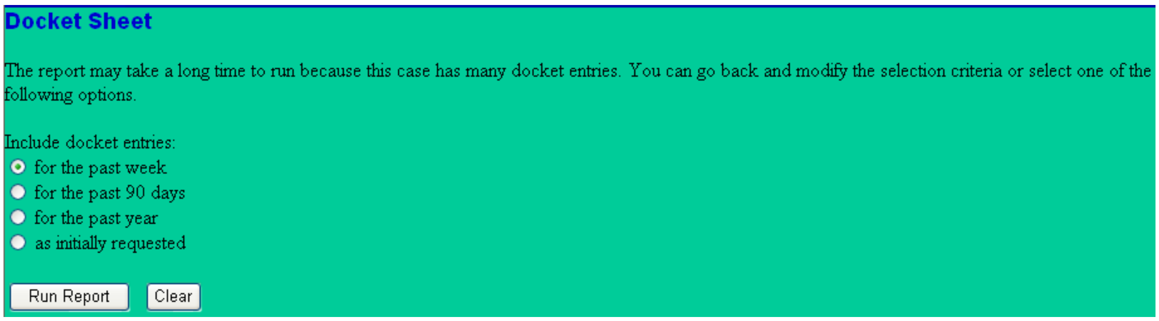
If you run a docket report from Query, the ***View Combined Docket Report*** selection checkbox will appear on the *Docket Sheet* page beneath the case number.



Docket Report

Large Docket Sheet Warning

If a docket sheet is large, the user will be given a warning and provide a new selection criteria screen. This new screen presents the user with the option to choose to include docket entries for the past week, the past 90 days, the past year, or as initially requested.



Query Screen

The Query screen was modified as follows:

- A *Cause of Action* selection list was added. Previous versions only allowed you to query by *Nature of Suit*.
- The redundant row of *Case Status* radio buttons was removed.
- The party name search fields are no longer separated from the case search fields.

Queries can now be run by entering a case number or any combination of the following:

- Case Status
- Filed Date
- Last Entry Date
- Last/Business Name
- First Name
- Middle Name
- Cause of Action
- Type
- Prisoner ID
- Nature of Suit