

# Eastern District of Virginia Electronic Case Filing Policies and Procedures Manual

## Chapter Eight: Miscellaneous Information

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# Miscellaneous Information: Query

## Introduction

The *Query* function allows filing users to access case specific information. Filing users can query cases either directly from PACER or indirectly from ECF.

## Entering the Query Mode from ECF

To use the *Query* function while in ECF, take the following steps:

| Step | Action  |
|------|---|
| 1    | Click on <i>Query</i> from the blue menu bar, which will open the PACER login screen. |
| 2    | Enter your PACER login and password.  |

## Screen Shot of Query Data Entry Screen

The following screen shot depicts the *Query* data entry screen.

The screenshot shows the ECF Query data entry screen. The interface has a blue header with 'ECF' and navigation tabs for 'Civil', 'Criminal', 'Query', 'Reports', and 'Utilities'. The main area is yellow and titled 'Query'. It contains a 'Search Clues' section with various input fields: 'Case Number' (text box), 'Case Status' (radio buttons for Open, Closed, All), 'Filed Date' and 'Last Entry Date' (date range pickers), 'Nature of Suit' and 'Cause of Action' (dropdown menus), 'Last/Business Name' (text box with examples), 'First Name' and 'Middle Name' (text boxes), and 'Type' (dropdown menu). At the bottom are 'Run Query' and 'Clear' buttons.

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## Miscellaneous Information: Query, Continued

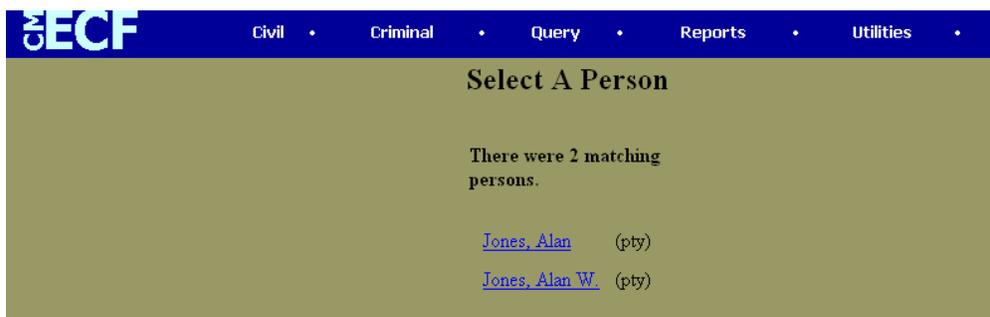
**Searching for a Case** To search for your case from the *Query* data entry screen, do the following:

| <b>If you...</b>                                   | <b>Then...</b>   |
|--|--|
| Know the case number of the case you wish to query | <ul style="list-style-type: none"><li>• Enter the case number in the <i>Case Number</i> field and</li><li>• Click on the <i>Run Query</i> button.</li></ul>  |
| Don't know the case number you wish to query       | <ul style="list-style-type: none"><li>• Enter the party's name in the party name fields as follows:<ul style="list-style-type: none"><li>➤ Company name in the Last Name field.</li><li>➤ Individual's last name in the <i>Last Name</i> field and first name in the <i>First Name</i> field, then</li></ul></li><li>• Click on the <i>Run Query</i> button.</li></ul> |

**Search Results from the Query Data Entry Screen**

More than one case may result from a party search; therefore, you will need to click on the appropriate party name to access the case docket.

Screen shot of party name search results for party Alan Jones:



# Miscellaneous Information: Reports

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## Introduction

The *Reports* function of ECF provides the filing user with the following report options:

- Docket Sheet,
- Civil Cases,
- Criminal Cases,
- Calendar Events,
- Docket Activity, and
- Written Opinions.

Filing users can access the *Reports* function either directly from PACER or indirectly from ECF.

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## Enter the Reports Feature from ECF

To enter the *Reports* function while in ECF, take the following steps:

| Step | Action  |
|------|---|
| 1    | Click on <i>Reports</i> from the blue menu bar, which will open the PACER login screen. |
| 2    | Enter your PACER login and password.  |

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## Screen shot of Reports Feature Screen

The following screen shot depicts the *Reports* function screen.



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## Miscellaneous Information: Reports, Continued

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### Docket Sheet Report

The *Docket Sheet* report allows you to view a docket sheet.

To view a docket sheet for a particular case, do the following:

- Enter the case number in the *Case number* field.
- Click on the *Find This Case* button.
- Check the boxes to include the information next to the box.
- Select either *Oldest date first* to sort the docket sheet by the oldest entry to the most recent or *Most recent date first* to sort the docket sheet by the most recent entry to the oldest entry.
- Click on the *Run Report* button.

**Docket Sheet**

Case number

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

Make these options my default.

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## Miscellaneous Information: Reports, Continued

### Civil Cases Report

The *Civil Cases Report* allows you to run a civil case report by any of the selection criteria on the *Civil Cases Report* screen, including the following:

- Office (division),
- Case type,
- Nature of suit,
- Cause,
- Jurisdiction, and
- Case flags.

**Note:** As usual, the system allows you to pick more than one item from the dropdown lists if you hold down the *CTRL* key while clicking on the items.

**Civil Cases 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.

Office: Alexandria, Newport News  
Case type: Civil, Miscellaneous  
Nature of suit: 0 (zero), 110 (insurance)  
Cause: 0 (No cause code entered), 02:0431 (02:431 Fed. Election...)  
Jurisdiction: Diversity, Federal Question  
Case flags: 2255, 3607  
Terminal digit(s): 2, 4-7  
 Open cases  
 Closed cases  
Filed: 1/28/2010 to 2/4/2010  
Sort by: Case Number  
Output Format:  Formatted Display,  Data Only  
Run Report, Clear,  Make these options my default

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## Miscellaneous Information: Reports, Continued

### Criminal Cases Report

The *Criminal Cases Report* allows you to run a criminal case report by any of the selection criteria on the *Criminal Cases Report* screen, including the following:

- Office (division),
- Case types,
- Case flags,
- Citation,
- Filing date, and
- Status of defendants.

**Note:** As usual, the system allows you to pick more than one item from the dropdown lists if you hold down the *CTRL* key while clicking on the items.

**Criminal Cases 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.

Office: Alexandria, Newport News  
Case types: Criminal, Magistrate Judge  
Case flags: 2255, 3607  
Citation: [dropdown]  
Count Status:  Pending  Disposed  
Filed: 1/28/2010 to 2/4/2010  
Terminal digit(s): 2, 4, 7  
 Pending defendants  
 Terminated defendants  
 Fugitive defendants  
 Non-Fugitive defendants  
Sort by: Case Number [dropdown] [dropdown] [dropdown]  
Output Format:  Formatted Display  Data Only  
Run Report Clear  Make these options my default.

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## Miscellaneous Information: Reports, Continued

### Docket Activity Report PUBLIC ACCESS

The *Docket Activity Report PUBLIC ACCESS* allows you to run a report by any of the selection criteria on the *Docket Activity Report PUBLIC ACCESS* screen, including the following:

- Case number,
- Whether the cases are open or closed,
- Office (division),
- Case types,
- Event category, and
- Case flags.

**Note:** As usual, the system allows you to pick more than one item from the dropdown lists if you hold down the *CTRL* key while clicking on the items.

The screenshot shows the ECF (Electronic Case Filing) interface for the 'Docket Activity Report PUBLIC ACCESS'. At the top, there is a navigation bar with 'Civil', 'Criminal', 'Query', 'Reports', 'Utilities', and 'Logout' links, along with a help icon. A warning message states: '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.' The main form area is titled 'Docket Activity Report PUBLIC ACCESS' and contains several input fields and checkboxes. The 'Case number' field is empty. The 'Office' dropdown menu is set to 'Alexandria'. The 'Case type' dropdown menu is set to 'CR Misc Cases'. The 'Event category' dropdown menu is set to 'adr'. The 'Case flags' dropdown menu is set to 'ARBITRATION'. The 'Filed between' field is set to '12/20/2006' and '12/21/2006'. The 'Sort by' dropdown menu is set to 'Case Number'. There are checkboxes for 'Only cases to which I am linked' (checked), 'Open cases', and 'Closed cases'. There are radio buttons for 'Summary text' (selected) and 'Full docket text'. At the bottom, there are 'Run Report' and 'Clear' buttons, and a checkbox for 'Make these options my default'.

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## Miscellaneous Information: Reports, Continued

### Written Opinions Report

The *Written Opinions Report* allows you to search for written opinions that were filed by the Court after April 16, 2005, which are available at no cost to ECF and PACER users.

**Note:** To access this report, you will not be prompted to enter your PACER login and password.

You can run a *Written Opinions* report by any of the selection criteria on the *Written Opinions Report* screen, including the following:

- Case number,
- Office (division),
- Nature of suit,
- Case type,
- Cause,
- Case flags, and
- Filing date.

**Note:** As usual, the system allows you to pick more than one item from the dropdown lists if you hold down the *CTRL* key while clicking on the items.

The screenshot shows the ECF (Electronic Case Filing) interface for the 'Written Opinions Report'. The top navigation bar includes 'Civil', 'Criminal', 'Query', 'Reports', 'Utilities', and 'Logout'. The main form area is titled 'Written Opinions Report' and contains the following fields and options:

- Case Number:** A text input field.
- Last Name:** A text input field.
- First Name:** A text input field.
- Middle Name:** A text input field.
- Office:** A dropdown menu with options 'Alexandria' and 'Norfolk'.
- Nature of Suit:** A dropdown menu with options '0 (zero)' and '110 (Insurance)'.
- Case Type:** A dropdown menu with options 'CR Misc Cases' and 'Civil'.
- Cause:** A dropdown menu with options '0 (no cause specified)' and '02:0431 (02:431 Fed. Election...)'.
- Case Flags:** A dropdown menu with options '2255' and '3607'.
- Filed between:** Two date input fields showing '11/21/2006' and '12/21/2006'.
- Text Selection:** Two radio buttons: 'Summary text' (selected) and 'Full docket text'.
- Sort by:** A dropdown menu set to 'Case Number'.
- Buttons:** 'Run Report' and 'Clear' buttons.

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## Miscellaneous Information: Reports, Continued

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### Calendar Events Report

The Calendar Events report allows you to search for hearings that are scheduled. The selection criteria for a search are as follows:

- Case Number,
- Judge,
- Office,
- Nature of Suit,
- Type of Hearing,
- Date range, and
- Include docket text, closed cases and display terminated parties.

The screenshot shows a web-based search interface for the 'Calendar Events Report'. The interface is titled 'Calendar Events Report' in blue text. It features several search criteria fields: 'Case number' (a text input field), 'Judge' (a dropdown menu with options '(MAG) LMB (T)' and '(MAG) O'Grady, Liam (T)'), 'Office' (a dropdown menu with options 'Alexandria (1)', 'Norfolk (2)', and 'Richmond (3)'), and 'Nature of suit' (a dropdown menu with options '0 (zero)' and '110 (Insurance)'). There is also a 'Calendar events' dropdown menu with options 'All Hearings', 'Allocation Hearing', and 'Arbitration Hearing'. A date range selector is present with 'Set 2/19/2010 to' followed by an empty date field and a 'Calendar' button. Below this are radio buttons for 'Both', 'AM', and 'PM', and a 'Time' input field. At the bottom, there are checkboxes for 'Include docket text', 'Include closed cases', and 'Display terminated parties'. A 'Sort by' dropdown menu is set to 'Time'. At the very bottom are 'Run Report' and 'Clear' buttons.

## Miscellaneous Information: Utilities

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### Introduction

The *Utilities* function provides the means for filing users to maintain their account in ECF and to view all of their ECF transactions and some PACER-related account information.

The screen shot below shows all the main categories available to filing users.



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## Miscellaneous Information: Utilities, Continued

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**Changing Your Password**      Change your password by taking the following steps:

| <b>Step</b> | <b>Action</b>   |
|-------------|---|
| 1           | Click <i>Utilities</i> on the upper right side of the main blue menu bar.   |
| 2           | Click on <i>Maintain Your Password</i> .  |
| 3           | <ul style="list-style-type: none"><li>• Enter your new password in the password box by using your mouse to highlight the asterisks in the white box, typing the new password, and then typing the new password.</li><li>• Click the <i>Submit</i> button.</li></ul> |
| 4           | Click <i>Logout</i> on the upper right side of the main blue menu bar. You may now log back in using your new password.   |

**Note:** It is very important that you record your new password and keep it in a safe place. The clerk's office does not maintain a record of your password. If you forget your password, you must click on the *Forgotten Password* link on the CM/ECF section of our Internet site, and the CM/ECF system will issue you a new password, which you can then change by going into *Utilities* as described above.

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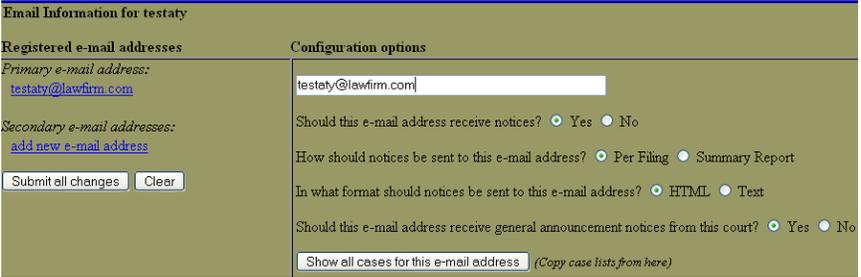
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## Miscellaneous Information: Utilities, Continued

**Changing Your E-mail Address** You can update e-mail information by clicking the *Maintain Your Email* on the *Utilities* screen.

**Note:** It is very important that you keep this e-mail information current, since ECF will e-mail the NEFs based upon the information entered in this screen.

To change your e-mail address, take the following steps:

| Step | Action   |
|------|--|
| 1    | Click <i>Utilities</i> on the blue menu bar.   |
| 2    | Click <i>Maintain Your Email</i> link.   |
| 3    | <p>Click on your e-mail address on the left of the screen.</p>  <p><b>Note:</b> Configuration options and a white box with your e-mail address will appear on the right side of the screen.</p>   |
| 4    | <p>Remove your old e-mail address and add your new e-mail address in the white box on the right of the screen containing your old e-mail address in any of the following manners:</p> <ul style="list-style-type: none"> <li>• Highlighting your old address and then typing in your new address,</li> <li>• Highlighting your old address, deleting the old address, and then typing in your new address, or</li> <li>• Deleting your old address and then typing in your new address.</li> </ul> |
| 5    | <p>Click the <i>Submit all changes</i> button on the left of the screen.</p> <p><b>Note:</b> You may need to click additional <i>Submit</i> buttons to apply this change to all of your cases.</p>   |

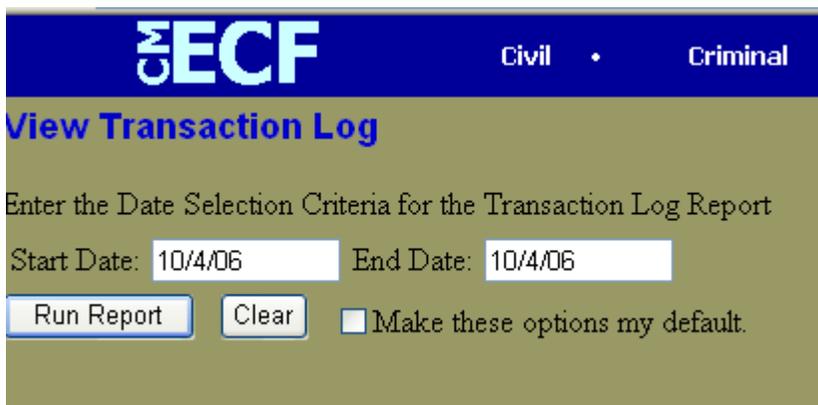
**Note:** See additional information under *Tips* under *General Information* on the CM/ECF section of the EDVA Internet site.

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## Miscellaneous Information: Utilities, Continued

### View Your Transaction Log

When you click on the menu item, *View Your Transaction Log*, from the main *Utilities* screen, you can enter a date range to view all of your ECF transactions in the date range specified.



Below is a screen shot of the results from running the *Transaction Log* report:



| Id     | Date                | Case Number | Text   |
|--------|---------------------|-------------|--|
| 516586 | 10/04/2006 14:59:16 | 1-06-cv-320 | THIRD PARTY COMPLAINT against Donald Hsia filed by The Hanover Insurance Company. (ltn)  |
| 516605 | 10/04/2006 15:06:04 | 1-06-cv-320 | Added Attorney for The Hanover Insurance Company in Case 1:06-cv-00320-JCC-TRJ   |
| 516609 | 10/04/2006 15:07:55 | 1-06-cv-320 | CROSSCLAIM against Eugene J. Mark, Jr, First Washington Title & Escrow Corporation filed by The Hanover Insurance Company. (ltn) |

Total Number of Transactions: 3

### PACER Options

The *Utilities* function also allows you to access and maintain the following PACER-related account information:

- Change Client Code,
- Change Your PACER Login,
- Review Billing History,
- Show PACER Account, and
- Remove Default PACER Account.

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## Miscellaneous Information: Utilities, Continued

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### Miscellaneous Functions

The *Utilities* function provides the following three miscellaneous activities:

- Legal Research, which links you to the following external resources:
  - Law Dictionary,
  - Lexis via the Internet,
  - Medical Dictionary, and
  - Westlaw via the Internet.

*Note:* You must have your own account to access the information within Lexis and Westlaw.

- Mailing Information for a Case which allows you to check the recipient list for a particular case.
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## Miscellaneous Information: Logout

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### Logout

After you have completed all of your transactions for a particular session in ECF, you should exit the system clicking on the *Logout* function in the blue menu bar. Take the following steps to Logout:

| Step | Action   |
|------|--|
| 1    | Click on the <i>Logout</i> function on the blue menu bar, which returns you to the ECF login screen.   |
| 2    | Click on the X in the upper right-hand corner of the program.<br><br><i>Note:</i> Do not click on the X until have you have clicked on Logout. |

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## Miscellaneous Information: Public Access

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**Overview** This section outlines all the ways the public can access information, either remotely or at a courthouse.

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**PACER Access** A person may receive information from the ECF system by obtaining a PACER login and password. A person who has PACER access may retrieve docket sheets and documents (unless otherwise sealed or restricted) in criminal and civil cases.

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**Paper Document Access** Any document that was submitted on paper, was not made available electronically, and is not sealed can be viewed at the courthouse. In such instances, only the docket sheet may be available electronically.

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**Clerk's Office Access** All electronic docket sheets and documents (unless they are sealed) are available for free public viewing from dedicated courthouse computer terminals during regular clerk's office hours.

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**Copies of Filed Documents** Paper copies and certified copies of electronically filed documents may be obtained at the clerk's office. The fee for copying and certifying is in accordance with 28 USC 1914.

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## Miscellaneous Information: Questions/Help

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### Getting Assistance with Questions and Concerns

Our goal is to make your EDVA electronic filing experience as easy and smooth as possible. We are available to assist you with your questions.

The following are types of help provided:

- Quick information on specific filing questions.
- Error correction when filing users realize that they have made a mistake after they have committed a transaction.
- Walk-through for first-time filers.

Below is a summary of the various ways you can contact clerk's office staff for assistance:

| Help Source   | Contact Information  |
|---|--|
| Alexandria Help Desk  | <ul style="list-style-type: none"> <li>• 703-299-2101 – Civil</li> <li>• 703-299-2102 – Criminal</li> </ul>  |
| Norfolk/<br>Newport News<br>Help Desk                             | <ul style="list-style-type: none"> <li>• 757-222-7201 – Civil</li> <li>• 757-222-7202 – Criminal</li> </ul>  |
| Richmond Help Desk  | <ul style="list-style-type: none"> <li>• 804-916-2220 – Civil</li> <li>• 804-916-2230 – Criminal</li> </ul>  |
| Frequently Asked Questions (FAQ) List                             | May be accessed by going to the: <ul style="list-style-type: none"> <li>• EDVA Internet page,</li> <li>• CM/ECF main page,</li> <li>• FAQ page.</li> </ul>   |
| Clerk's Office Staff Responsible for FAQ List and Revising Manual | <a href="mailto:vaed_ecf_questions@vaed.uscourts.gov">vaed_ecf_questions@vaed.uscourts.gov</a><br><br><i>Note:</i> Questions and comments about the FAQ list, the <i>E-Filing Policies and Procedures</i> manual, or other ECF policies and materials will be taken under advisement. They may be answered through the EDVA CM/ECF FAQ Internet page or through revisions to the manual, but the individuals posing questions to this e-mail box may not receive individualized responses. |

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