CASE MANAGEMENT ELECTRONIC CASE FILES

CM/ECF



ATTORNEY USER MANUAL DISTRICT OF NEW MEXICO

AUGUST 2016

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Getting Started

Introduction

CM/ECF is a comprehensive case management system that allows courts to maintain electronic case files and offer electronic filing over the Internet. This manual provides instructions on using CM/ECF (also referred to as "ECF") to file documents and retrieve reports and documents. Users should have a working knowledge of Internet web browsers, Adobe Acrobat Reader, and PDF creation software (*i.e.*, Adobe Acrobat Writer).

Help Desk

If you need additional assistance using CM/ECF, please contact the Help Desk between 8:30 AM and 12:00 PM and 1:00 PM to 4:30 PM, Monday through Friday (excluding federal holidays).

CM/ECF Help Desk	(505) 348-2075
OR	
Email	cmecf@nmcourt.fed.us

ECF System Capabilities

The electronic filing system allows registered participants with Internet access and an Internet web browser to perform the following functions:

- Electronically file documents.
- View official docket sheets and documents associated with cases.
- View various reports for cases that were filed electronically.

Hardware and Software Requirements

The hardware and software needed to electronically file, view, and retrieve case documents are the following:

- Personal computer running Windows, Linux, or Macintosh.
- High speed (broadband) Internet access (dial up access is not recommended).

- Internet web browser (the ECF login page displays information about which browsers have been tested and work correctly with CM/ECF).
- Adobe Acrobat Reader (available at no charge from <u>Adobe's web site</u>) to view PDF files.
- PDF writer software to convert documents from a word processor format to portable document format (PDF). If you search for "pdf writer" using your preferred Internet search engine, you should find many programs available to test and use.
- A scanner to convert documents not in your word processing system into PDF.

<u>NOTE</u>: A scanner will be used only for documents that cannot be produced electronically. Documents should be scanned in black and white, at a setting no lower than 300 dpi (dots per inch).

PACER Registration

ECF users must have a PACER account to use the Query and Report features of ECF. If you do not have a PACER account, you may register at <u>PACER</u>.

<u>NOTE</u>: Your PACER login and password are different from your ECF login and password. You must have a PACER account to retrieve, view and print certain documents and reports. **PACER will charge a fee to query information and access documents and reports.** Fee information can be obtained at <u>PACER</u>.

CM/ECF Registration

Attorneys must register with the Court to receive a login and password for CM/ECF. Information and registration forms can be obtained from the Court's web site, <u>Filing Information</u>. Once an account has been established, your login and password will be sent to you via the email address provided on the registration form.

Preparation

Setting Up Acrobat PDF Reader

Adobe's free Acrobat Reader software must be installed to view PDF documents filed in CM/ECF. Adobe Acrobat Reader can be downloaded at no charge from <u>Adobe's web site</u>.

Portable Document Format (PDF)

Viewing a PDF File

- Start Adobe Acrobat Reader.
- Go to the *File* menu, choose *Open*.
- Click on the location and file name of the document to be viewed.
- If the designated location is correct and the file is in PDF, Adobe Acrobat Reader will load the file and display it on the screen.

Converting Documents to PDF

Only PDF documents may be filed in CM/ECF. Before filing any document, users should always preview the PDF to ensure the document is correct.

You must convert all documents to PDF before filing in CM/ECF. The conversion process requires PDF writer software (*i.e.*, Adobe Acrobat Writer). Word Perfect (versions 9 and up), Open Office, and Microsoft Word (2010) have a PDF writer for converting documents to PDF.

Using a PDF Writer Program

- Install PDF writer software on your computer.
- Use your word processor to open the document to be converted.
- Select the **[Print]** option (generally found in the *File* menu); in the dialog box select the option to change the current printer. Select your **PDF** writer's printer from the list of printer choices displayed in the drop down menu.
- "Print" the file. The file will not actually print; instead, the option to save the file as a PDF file appears. If you do not see the following screen, check your task bar because the screen may be hidden behind another window.



- Note the PDF file's location so you can find the document later when you are ready to file it. Change the location if necessary by clicking in the "Save in:" area near the top of the window.
- Name the file, including the extension .pdf, then click **[Save]**.
- If you are using a word processor that converts documents directly to PDF, look for an option (typically found under *File*) that says "export to PDF" or "save to PDF." Again, note the file's location so you can find it later.

ECF Basics

User Interactions

There are three general types of user interactions allowed by ECF:

- Entering information in data fields.
- Using command buttons to direct system activities.
- Mouse-clicking on hyperlinks.

Documents Filed in Error

A document incorrectly filed in a case may result from:

- Selecting the wrong PDF file during the filing process,
- Entering the wrong case number, or
- Selecting the wrong document type/event from the filing menu.

ECF does not permit you to change the misfiled document or docket entry after the transaction has been accepted. To request a correction, call the CM/ECF Help Desk as soon as possible after an error is discovered. You will need to provide the case number and document number for the document requiring correction. You will be advised if you need to re-file the document; if appropriate, the Court may make an entry indicating that the document was misfiled.



Documents filed in ECF, including documents filed in error, are instantly noticed to all case participants and the Court via email, so check each filing thoroughly before submitting the transaction.

Viewing Transaction Log

The transaction log, accessed from **Utilities** in the blue menu bar, allows you to review all transactions ECF has processed with your login and password. If you believe or suspect someone is using your login and password without your permission, change your password immediately, then telephone the Help Desk as soon as possible.

Signatures and Affidavits of Service

Documents that must contain original signatures or that require either verification or a sworn declaration under any rule or statute shall be filed electronically, with originally executed copies maintained by the filer. The electronically filed documents should include a signature, for example, "/s/ Jane Doe."

In the case of a stipulation or other document to be signed by two or more persons, the following procedure should be used:

- a) The filing party or attorney shall initially confirm that the content of the document is acceptable to all parties required to sign the document and shall obtain the physical signatures of all parties on the document.
- b) The filing party or attorney shall then file the document electronically, indicating the signatories--for example, "/s/ Jane Doe" and/or "/s/ John Doe."
- c) The filing party or attorney shall retain the hard copy of the document containing the original signatures until the time for all appeals has expired.

A non-filing signatory or party who disputes the authenticity of an electronically filed document containing multiple signatures or the authenticity of the signatures themselves must file an objection to the document within ten days of receiving the Notice of Electronic Filing.

Summonses

Please refer to the <u>Procedures for Having a Civil Summons Issued</u>. This document contains the preparation procedures, document format requirements, and email address for submitting summonses to the Clerk's Office to be issued.

Proposed Orders

Please refer to <u>Submitting Proposed Orders and Other Text/Documents</u> on the Court's web site. It contains the general procedures and document format preferences as well as an email address for each judge.

Paying Filing Fees Online

Please refer to <u>Paying Filing Fees Online</u> (also posted on the Court's web site) for step-by-step instructions for making an online filing fee payment through Pay.gov.

Context Sensitive Help

If you have a question about any CM/ECF screen, click the yellow question mark in the right margin of the CM/ECF blue menu bar. This will often provide context sensitive help for the screen you are viewing.

The ECF Filing Process

The filing process is described, step-by-step, below. If you are unfamiliar with the filing process, it is recommended that you view the <u>Electronic Learning Modules</u> available at the Training Section of PACER's web site before trying to file a document.

Accessing CM/ECF

Access CM/ECF by going to: <u>http://ecf.nmd.uscourts.gov</u> OR <u>http://www.nmd.uscourts.gov/</u> then click **E-Filing** (CM/ECF).

Logging In

The next screen is the login screen:

ECF 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.
If you forgot your CM/ECF password, you can request a password reset here
Authentication Login: Password: Login Reset CM/ECF has been tested with Firefox and Internet Explorer 8 and 9.
ECE Login Serge

ECF Login Screen

Enter your ECF login and password in the appropriate data fields. All ECF login names and passwords **are case sensitive**.

<u>NOTE</u>: Use your ECF login and password if you are filing a document or maintaining your account. If you are querying the database for case information or to view a document, you may also be prompted to enter your PACER login and password. You will be charged a fee to view case dockets and documents using PACER. Fee information can be obtained at <u>PACER</u>.

Verify that you have entered your ECF login and password correctly; if necessary, click **[Reset]** to erase the login and password entries then re-enter the correct information.

If ECF does not recognize your login and password, it will display the following message:

Login	failed	because	of incorrect	login	name	and /or	password
-------	--------	---------	--------------	-------	------	---------	----------

Back

ECF Login Error

Click **[Back]** then enter the correct login and password.

After you enter the correct login and password information, click **[Login]** to transmit your user information to ECF.

Once the **Main Menu** appears, choose from the list of **<u>hyperlinked</u>** options on the blue menu bar at the top.





The date you last logged into the system appears at the bottom left corner of this screen. For security reasons, you should review this information each time you login. If you believe your last login date and time are incorrect, or suspect an unauthorized party is using your login and password, please change your password then call the CM/ECF Help Desk (505-348-2075) as soon as possible.

Selecting ECF Features

The following ECF features are accessible from the blue menu bar at the top:

<u>Civil</u>	Select to file civil case pleadings, motions, and other documents.
<u>Criminal</u>	Select to file criminal case pleadings, motions, and other documents.
<u>Query</u>	Select to query ECF by specific case number, party name, or nature of suit. (You must login to PACER before you can query ECF.)
<u>Reports</u>	Select to retrieve docket reports and case based reports. (You must login to PACER before you can view an ECF report.)

<u>Utilities</u>	Select to view your ECF transaction log, find mailing addresses for parties in cases in which you are counsel, and maintain your ECF account information.
<u>Search</u>	Select to find and get to the menu option or docket event you need.
<u>Logout</u>	Select to exit ECF and prevent further filing with your password until the next time you login.

Civil Events Feature

This section of the manual describes the basic steps to follow when filing a motion with the Court (the filing process is essentially the same regardless of the type of document being filed or the type of case–civil or criminal–in which the filing is being made).

General Rules and Navigating the Screens

Each screen has the following two buttons:



Clears all characters entered in the boxes on that screen.



Accepts the entry just made and displays the next screen.

Correcting an Error

Use the **[Back]** button on the browser's toolbar to go back and correct an entry made on a previous screen. Once the document is transmitted to the Court, no changes can be made.



Do not use the browser's **[Back]** button if you are opening a new case. If you are opening a case and you make a mistake **<u>before</u>** you have received the assigned case number, start the case opening process again by selecting <u>**Civil**</u> from the blue menu bar at the top of the screen.

Civil Case Opening

See <u>CM/ECF Civil Case Opening Procedures</u> for instructions on opening a new civil case with a complaint, notice of removal, or other initiating document.

Filing a Document

The steps for filing a document are:

Step 1	Select the type of document being filed
Step 2	Enter the number of the case in which the document is being filed
Step 3	Designate the party or parties filing the document
Step 4	Specify the PDF file for the document being filed
Step 5	Select document restriction
Step 6	Modify docket text as necessary
Step 7	File the document
Step 8	Receive notification of the filing

Step 1 Select the type of document (*i.e.*, answer, motion, notice) being filed

After successfully logging into ECF, select <u>Civil</u> from the blue menu bar. The Civil Events window opens and displays all available filing events, organized by category.

SECF civil - c	Crimi <u>n</u> al • <u>Q</u> uery	<u>R</u> eports ▼ <u>U</u> tilities	▪ Sear <u>c</u> h	<u>L</u> ogout	?
Civil Events					
Open a Case Civil Case Opening by Attorneys Initial Pleadings and Service Complaints. Other Initiating Docum Service of Process Answers to Complaints Other Answers Motions and Related Filings Motions Responses and Replies Proposed Orders	Other Filings Notices Trial Documents Appeal Documents Other Documents Inmate Events	Filing Fees and Dues Make Online Payment Pay NM Federal Bar Dues			

Civil Events Page

These instructions describe the process for filing a **Motion** in a civil case; as stated earlier, the process is similar for filing other documents in ECF.

Under Motions and Related Filings, click Motions.

∃ECF	C <u>i</u> vil	Ŧ	Crimi <u>n</u> al	•	Query	<u>R</u> eports	•	<u>U</u> tilities	-	Sear <u>c</u> h	<u>L</u> ogout	2
Motions												
		Start t	yping to fin	nd and	ther event.							
Available Events (click to select events) Selected Events (click to remove events)												
More Definite Statement New Trial Order of Sale Partial Summary Judgment Permanent Injunction Proceed 28 U.S.C. 1915 Proceed In Forma Pauperi Produce Protective Order Quash Reassign Case Reconsideration					 Preliminary Inj 	Inction						
Recusal				Ē	-							
Next Clear												

Civil Motions Page

The **Motions** screen appears and displays a motion selection list with a scroll bar next to it. Scroll through the list until you find the type of motion being filed. Click on the appropriate motion type; the type will be highlighted, and the **Selected Events** field will be populated with the event type selected. Click [Next].

Step 2 Enter the number of the case in which the document is being filed

The next screen displays the Case Number field.

ž	ECF	C <u>i</u> vil	•	Crimi <u>n</u> al	-	<u>Q</u> uery	<u>R</u> eports	•	<u>U</u> tilities	-	Sear <u>c</u> h	<u>L</u> ogout	?
Μ	lotions												
C	Civil Case Number	_											
		99-12	345, 1:99-	-ov-12345, 1-9	99-ov-1234	5, 99ov12345, or 1:9	9cv12345						
	Next Clear												

Motions screen with case number field

Enter the number of the case in which the motion is being filed. (If the number was entered incorrectly, click **[Clear]** then re-enter the number.)

SECF	C <u>i</u> vil	•	Crimi <u>n</u> al	•	Query	<u>R</u> eports	•	<u>U</u> tilities	•	Sear <u>c</u> h	<u>L</u> ogout	2
Motions												
Civil Case Number												
99cv12345	Find	This Case	1									
-	_											
Next Clear												

Motions screen after case number entered

Click [Find This Case]. If you are prompted that the case cannot be found, click [Clear] then re-enter the number; click [Find This Case] again, then click [Next]. The next screen (not shown here) will display the case number and case name; if the case information is correct, click [Next].

Step 3 Designate the party or parties filing the document

SECF Civil - Crir	ni <u>n</u> al ▼ Query	<u>R</u> eports -	<u>U</u> tilities •	Sear <u>c</u> h	Logout
Motions <u>1:99-cv-12345 Jones v. ABC Corporation</u> WARNING: If you have not formally ma of any future filings.	ide an appearance on this	case via an initia	ting document	or an entry of appea	▲ arance, you will not receive notifications
Pick Filer Collapse All Expand All ABC Corporation dft Joseph Jones pla	Select the filer. Select the Party: ABC Corporation [dft] ABC Corporation [dft] Jones, Joseph [pla] V Next Clear New Filer	1			

Select the filer screen

Select the filer from the Select the Party: box (shown in the screen's right pane), by clicking on the name of the party who is filing the motion. To select more than one filing party, hold down the Ctrl key then point and click on each filing party's name. After highlighting the party or parties filing the motion, click [Next].

Step 4 Specify the PDF file for the document being filed

The next **Motions** screen displays a field for locating and entering the PDF version of the document being filed:

SECF	Cįvil	-	Crimi <u>n</u> al	-	Query	<u>R</u> eports	•	<u>U</u> tilities	•	Sear <u>c</u> h	<u>L</u> ogout	?
Motions												
1:99-cv-12345 Jones												
Select the pdf doc	iment a	and ar	ny attachme	nts.								
Main Document			Browse_									
Attachments					Category			Description	1			
1.			Browse									
Next Clear												

<u>NOTE</u>: All documents filed in ECF must be in PDF and must not exceed the maximum file size; otherwise, ECF will not accept the document for filing. The maximum file size is listed under Court Details on the <u>CM/ECF Court Information</u> page.

Screen for uploading document and any attachment(s)

To load the Main Document for filing, click the [Browse] button to see the File Upload screen:

Name ^	Date modified	Туре	Size	
🔁 information.pdf	6/17/2002 11:47 AM	Adobe Acrobat Doc	7 KB	
🔁 judgment.pdf	6/17/2002 12:49 PM	Adobe Acrobat Doc	7 KB	
🔁 mandate.pdf	6/17/2002 4:06 PM	Adobe Acrobat Doc	6 KB	
🔁 Memo in support.pdf	7/1/2002 9:52 AM	Adobe Acrobat Doc	8 KB	
🔁 minutes.pdf	6/17/2002 12:48 PM	Adobe Acrobat Doc	6 KB	
🔁 motion.pdf	6/17/2002 12:50 PM	Adobe Acrobat Doc	6 KB	
🔁 Notice of Appeal.pdf	6/17/2002 4:41 PM	Adobe Acrobat Doc	7 KB	
🔁 Notice of Hearing.pdf	6/19/2002 8:17 AM	Adobe Acrobat Doc	7 KB	
🔁 Notice.pdf	7/1/2002 9:55 AM	Adobe Acrobat Doc	6 KB	
🔁 Objection.pdf	6/14/2001 9:48 AM	Adobe Acrobat Doc	5 KB	
Drder - Denying.pdf	6/14/2001 9:52 AM	Adobe Acrobat Doc	6 KB	

Partial image of file upload dialog box

From the **File Upload** screen, navigate to the appropriate directory then locate the file name of the PDF document being filed. Click the file's name then click **[Open]**.

<u>NOTE</u>: To verify that you have selected the correct document for filing, right mouse click on the highlighted file name to open a **quick menu**, then left mouse click on **[Open]** or **[Open with Adobe Reader]**. A PDF reader will launch and open the PDF document you selected. View the document and verify that it is the correct document.

ECF closes the **File Upload** screen and inserts the PDF file name and location in the **Motions** screen in the **Main Document** field.

SECF	C <u>i</u> vil		Crimi <u>n</u> al		Query	<u>R</u> eports		<u>U</u> tilities	Sear <u>c</u> h	<u>L</u> ogout	2
Motions											
1:99-cv-12345 Jone	s v. ABC	Corpor	ation								
Select the pdf doc	ument a	and any	/ attachme	nts.							
Main Document	Clerk's Offi	ce Acc	Browse_								
Attachments					Category		0	Description			
1.			Browse								
Next Clear											

Main Document field shows selected PDF

If there are no Attachments to the motion, click [Next], then proceed to Step 5.

If there are **Attachments**, browse for and locate the PDF file for each attachment (as each attachment is uploaded, another attachment field will appear). Identify each attachment by selecting a category and/or adding a description. When all attachments have been added, click **[Next]**.

SECF	C <u>i</u> vil	•	Crimi <u>n</u> al	•	Query	<u>R</u> eports	•	<u>U</u> tilities	•	Sear <u>c</u> h	<u>L</u> ogout	2
Motions 1:99-cv-12345 Jones		Corror	tion									
Select the pdf docu				nts.								
Main Document G:\Judicial Operations\C	lerk's Offic	ce Acc	Browse									
Attachments					Category			Description				
1. G: Judicial Operations	s\Clerk's (Office Acc	Browse	Affidavit	•			Remove				
2.			Browse_		•]				
Next Clear												

Attachments field shows selected PDF with category

Step 5 Select document restriction

Select the document restriction for the filing (see the <u>CM/ECF Administrative Procedures Manual</u> for information about setting document access restrictions):

SECF	C <u>i</u> vil	-	Crimi <u>n</u> al	•	Query	<u>R</u> eports	•	<u>U</u> tilities	•	Sear <u>c</u> h	<u>L</u> ogout	?
Motions 1:99-cv-12345 Jon			-tion									
Select access lev	el for th	is docur	nent/docke	et entry								
Accessible by	public and	d all case	e participan	ts								
C Accessible by C Accessible only				he publi	с							
- Accessible only	y by mer a		Jount									
Next Clear												

Screen for setting restriction level

Click [Next].

Step 6 Modify docket text as necessary

Click the down arrow at the first field to open a modifier drop-down list, then select a modifier (First, Second, Amended, etc.), if appropriate. To add descriptive text for the document being filed, click in the open text area. This field can hold up to 256 characters; **abbreviations are not permitted**. Any added text will display on the docket report (*in italics*), so the description must be accurate and pertinent.

SECF	C <u>i</u> vil	•	Crimi <u>n</u> al	-	<u>Q</u> uery	<u>R</u> eports	-	<u>U</u> tilities	-	Sear <u>c</u> h	<u>L</u> ogout	
Motions												
1:99-cv-12345 Jone			<u>tion</u>									
Docket Text: Modify as			Prelimina	v Iniunc	tion to Cease an	d Decist	by	Joseph J	nnes ()		# (1) Affidavit)	
(Helpdesk, Attorn		011101		y injune		d Dooldt		oooopii o	, 1001		" (1 <i>)</i> """	
Next Clear												

Screen for modifying docket text

Click [Next].

Step 7 File the document

The next screen will display the complete docket text for the document being filed; the file name of the document and any attachment(s) will also be shown.



Final review screen

Carefully review the proposed final docket text. If corrections are needed, press your browser's **[Back]** button to correct the data on a previous screen. **[Clear]** has no effect on this screen.

<u>NOTE</u>: At any time prior to this step, you may abort the transaction or return to a previous screen by: a) clicking on an item in the blue menu bar (to abort and start over); or, b) clicking on the browser's **[Back]** button until you return to the desired screen.

Click **[Next]** to file the document.

Step 8 Receive notification of the filing

After clicking **[Next]** on the final filing screen, ECF will display the **Notice of Electronic Filing** (or "**NEF**"):



Partial image of NEF

The NEF confirms that ECF has registered the transaction and the document is now an official Court document. It also displays the date and time of your transaction and the document number assigned to the filing. The NEF represents your filing confirmation and receipt. It is strongly recommended that you print the NEF and/or save a copy to the hard drive on your computer.

- Select [**Print**] on your browser's toolbar to print the NEF.
- Select [File] on the browser's toolbar then choose Save Page As ... from the drop-down window to save the NEF to a file on your computer's hard drive.

The NEF will be transmitted electronically to the attorneys and any *pro se* parties to the case who have supplied email addresses to the Court.

<u>NOTE</u>: In the NEF section following "Notice has been delivered by other means to:" the names and addresses of any individuals who will *not be* electronically notified of the filing will be listed. <u>It is the responsibility of the filer to serve</u> copies of the document and the NEF to all case participants who are not electronically notified.

Email Notification of Filed Documents

After a document is filed, ECF sends a **Notice of Electronic Filing** to any case participants who have supplied their email addresses to the Court. Individuals who receive electronic notification of the filing are permitted one "free look" at the document by **single clicking** on the associated hyperlinked document number in the NEF. The filer is permitted one free look at the document to verify that the document was properly docketed. Subsequent retrieval of the document must be made through your PACER account and is subject to regular PACER fees.

<u>NOTE</u>: You must **single click** the document number hyperlink when accessing your one free look from the NEF. Users in all federal districts have reported problems when they double click the document number hyperlink: the first click represents the free look; however, a second click cancels the first click, and PACER subsequently applies a fee for the "second look."

To view a restricted document to which you have access, you must be logged into CM/ECF and PACER. To avoid difficulties, always login using your CM/ECF username and password; then if prompted for another login (after clicking "Reports" or "Query," for example), use your PACER account information.

Add/Create a New Party

When filing a document in a civil case, the filing party may not be part of the case. If this occurs the filing party must be added. For guidance about adding a party, see <u>Civil Case Opening</u> <u>Procedures</u>.

Linking Documents (Refer to an Existing Document)

Some documents (*i.e.*, Answer, Memorandum in Support) must be linked to their related documents in the case. When filing these and certain other types of documents, you will be presented with the following screen:

SECF civil	- c	Crimi <u>n</u> al	•	<u>Q</u> uery	<u>R</u> eports	•	<u>U</u> tilities	•	Sear <u>c</u> h	Logout
Responses and Replies										
1:99-cv-12345 Jones v. ABC C	Corporatio	n								
Should the document you Filed to Documents to Next Cear	ou are fili	ing link t	o anoth	er document in	this case	?				

Screen prompt re linking documents

To link a document you are filing to a previously filed document, check the box in front of **Should the document you are filing link to another document in this case?**, then click **[Next]**.

You will be presented with a list of documents available for linking. Click the box for the document you wish to link with the document being filed and continue with the filing process.



Linking screen; access levels also shown

The document linking will be indicated in the docket text for the filing:



Query and Reports Features

You may use these features to query specific case information. Caution should be used, however, as a PACER fee is charged for every page of each report requested. Click **Query** or **Reports** in the ECF blue menu bar to utilize these features. You will then be prompted to enter your PACER login and password (even if you are already logged into ECF). Detailed information about using these features can be found in the <u>PACER User Manual for ECF Courts</u> and at <u>PACER Training</u>.

Utilities Feature

The **Utilities** feature provides the means for registered users to maintain their account in ECF and to view all of their ECF transactions.

	Crimi <u>n</u> al • Query	<u>R</u> eports +	<u>U</u> tilities +	Sear <u>c</u> h	Logout
Utilities					
Your Account	Miscellaneous				
Maintain Your Address Maintain Your E-mail	<u>Legal Research</u> <u>Mailings</u>				
Maintain Your Login/Password View Your Transaction Log	Verify a Document				
Change Client Code Change Your PACER Login	Internet Payment History				
Review Billing History Show PACER Account					
Remove Default PACER Account					

Utilities Page

Your Account

This section is used to maintain certain aspects of your ECF account and to view a log of your ECF transactions.

Maintain Your Address

Click <u>Maintain Your Address</u> to open the Maintain User Account information screen. The screen displays your ECF account information as stored in the ECF database. When an attorney is added to a case, contact information is pulled from the attorney's account, so it is imperative that the information be kept up to date. *It is the attorney's responsibility to maintain the information on this screen.*

Maintain Your Email

Click <u>Maintain Your Email</u> to open the Email Information for [Attorney Name] screen.

∃ECF	Cįvil	•	Crimi <u>n</u> al	•	Query	<u>R</u> eports	•	<u>U</u> tilities	•	Sear <u>c</u> h	<u>L</u> ogout	?
Email Information	n for Atte	orney H	lelpdesk									
Registered e-mail	address	es			Configuration	options						
Primary e-mail addr @nmcourt.					Select an e-ma	il address to co	onfigure					
Secondary e-mail a add new e-mail ad		:										
Submit all changes	Clear											

Email addresses related to this account

From this screen, you are able to modify your primary email address and modify (or add) any secondary email addresses associated with your account. Notices of electronic filing will be sent to the email addresses shown on this screen dependent upon the configuration options you select. *It is the attorney's responsibility to maintain all email addresses associated with the attorney's account.*

To modify your primary or secondary email address, click on the email address shown in the left pane of the screen.

SECF Civil • Criminal •	<u>Q</u> uery <u>R</u> eports • <u>U</u> tilities • Search <u>L</u> ogout
Email Information for Attorney Helpdesk	
Registered e-mail addresses	Configuration options
Primary e-mail address: @nmcourt.fed.us	@nmcourt.fed.us
Secondary e-mail addresses: add new e-mail address	Should this e-mail address receive notices? . Yes . O No
Submit all changes Clear	How should notices be sent to this e-mail address? 💿 Per Filing 🔘 Summary Report
	In what format should notices be sent to this e-mail address? $ ^{\odot}$ HTML $ ^{ m C}$ Text
	Should this e-mail address receive general announcement notices from this court? ^O Yes ^O No
	Case-specific options
	Add additional cases for noticing
	These cases will send notice per filing. (default method)
	11:15-or-00087-JB-CG-1 USA v. Bond (Closed on 01/20/2015) - Representing James Bond Immediate State S
	These cases will send notice as a summary report. (alternate method) Remove selected cases Change selected cases to notice per filing
	Show all cases for this e-mail address (Copy case lists from here)

Email addresses associated with account and configuration options

The right pane of the screen now displays the **Configuration options** for the email address selected.

To add a secondary email address, click <u>add new e-mail address</u> (up to 12 secondary email addresses can be added). Once the new email address has been added to the field, the **Configuration options** portion of the screen will appear.

Change the options presented as appropriate:

- Select the method of noticing, either Per Filing or Summary Report. Per Filing NEFs are sent immediately to the email addresses listed. A Summary Report collects all NEFs for a single day and sends one report (shortly after midnight) containing all NEFs to your email address.
- Select the format, either HTML or Text, of the NEFs. HTML is preferred; however, users of mobile devices may select Text for easier screen reading.

If you have any questions regarding use of the **Case-specific options** or other options, please call the CM/ECF Help Desk (505-348-2075, Option 3).

To save your changes, click [Submit all changes], then print the confirmation screen for your records.

Maintain Your Login/Password



Login information for "Attorney Helpdesk"

This screen displays user login information and the ability to change your **Login** name and **Password**. The **Password** field is populated by a string of asterisks; to change your password, place the cursor in the **Password** field and delete <u>all</u> asterisks, then enter your new password (ECF will display the actual characters as you type).

When you have completed any modifications, click **[Submit]**. The next screen notifies you that your updates were accepted. If you changed passwords, begin using the new password during your next ECF session.

View Your Transaction Log

Use this report to verify that any transactions you entered are reflected in the Transaction Log and that no unauthorized individuals have entered any transactions using your login name and password. From the **Utilities** screen, click <u>View Your Transaction Log</u>.



Options for transaction log

As shown above, the screen will display two fields for entering Date Selection Criteria for the Transaction Log Report. Enter the date range requested then click **[Run Report]**. ECF will display a report of any ECF transactions made during the date range specified.

PACER Related Features

From Utilities, you may also work with PACER information.

<u>Change Client Code</u> helps track your research for client billing purposes.

<u>Change Your PACER Login</u> allows you to change to another PACER account. For example, if you perform CJA work and have a non-billable PACER account for that CJA work, this option can be used to change or switch to your other PACER account when appropriate.

<u>Review Billing History</u> is helpful if preparing billing statements before your PACER quarterly statement has been delivered.

Show PACER Account to review your PACER account settings.

<u>**Remove Default PACER Account**</u> to remove any default PACER account you may have associated with your CM/ECF account.

Miscellaneous

From Utilities, four miscellaneous functions are available.

Legal Research

Clicking this hyperlink will open a screen containing links to Lexis and Westlaw, a law dictionary, and a medical encyclopedia.

Mailings ...

This feature allows you to see which parties in a case are to be notified via email and which parties must be noticed by other means (*i.e.*, postal mail or courier). You can also print "mailing labels" which show the postal addresses for all parties in the case.

Verify a Document

Select this option to verify that a document has not been changed in any way since it was originally filed.

Internet Payment History

Select this option to show any payments made via Pay.gov (used when making filing fee, bar dues, or admission fee payments online). This option does not show any PACER charges.

Search Feature

To find a specific menu option or docket event, click **Search** from the CM/ECF blue menu bar. Type in some letters of a word; any menu items and events containing those letters will be displayed as a link. Click the link, and the first screen in the filing process for that particular event will be displayed.

Logout

Click **Logout** from the CM/ECF blue menu bar when you have completed your transactions for a particular session in ECF. ECF will log you out of the system and return you to the ECF login page.