Welcome

Slide notes: Welcome to the Introduction to CM/ECF Electronic Learning Module.

This lesson is designed to give you a basic introduction to the U.S. Courts' Case Management/Electronic Case Files application.

In order to closely simulate the CM/ECF application, each screen in this lesson will contain instructions for you to follow that mimic the actual software. Follow those instructions to progress through the lesson.

You may also use the playback controls at the bottom of each screen. You may move forward or back and you may rewind to the beginning of the lesson. You can also drag the progress indicator bar forward or back through the lesson. The playback controls include a pause/play button. If you pause the lesson, click the button again to resume.

There is also a menu on each page in the upper left corner. If you move your mouse over the word **MENU**, a menu will drop down. You can click on the desired topic to jump to that part of the lesson.

These CM/ECF lesson modules also have a Closed Captioning feature. Click the CC button in the playback controls to toggle closed captioning on or off. You may also click the speaker icon to toggle the audio on or off.
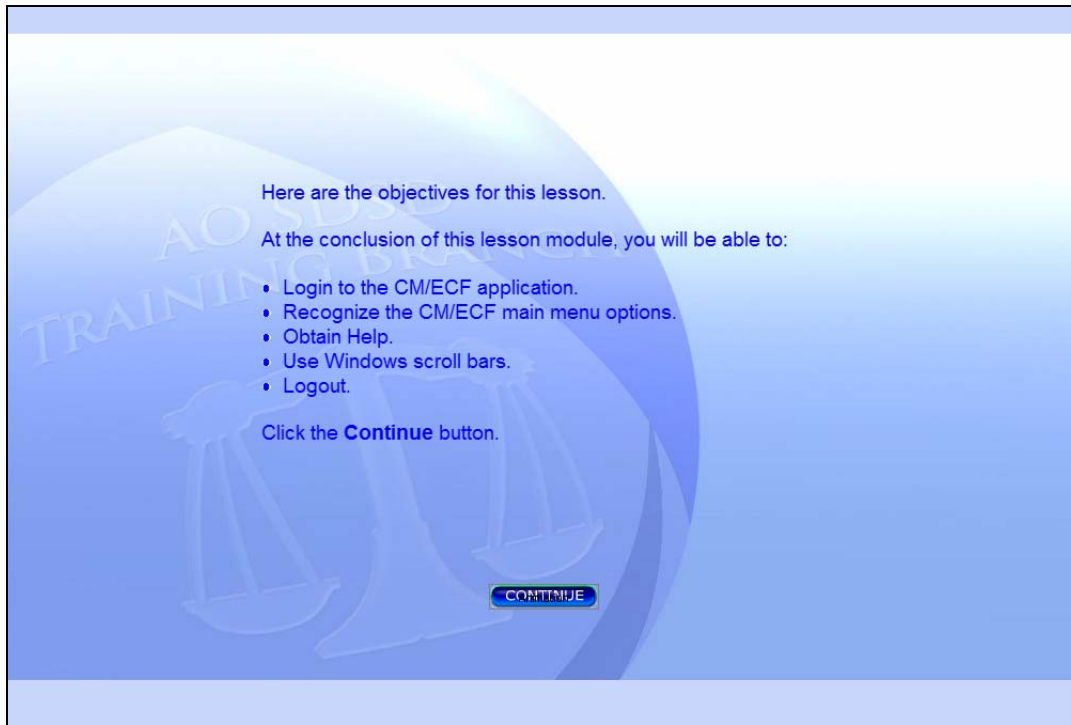
To exit the lesson, click the **X** in the upper right corner of the lesson window, or select **Exit the Lesson** from the menu.

Click the **Start** button when you're ready.

START

Navigation
Slide notes: These are the instruction for how to navigate through this lesson module. When you're ready, click the Start button to begin the lesson.

Objectives

Slide notes: Here are the objectives for this lesson.

At the conclusion of this lesson module, you will be able to:
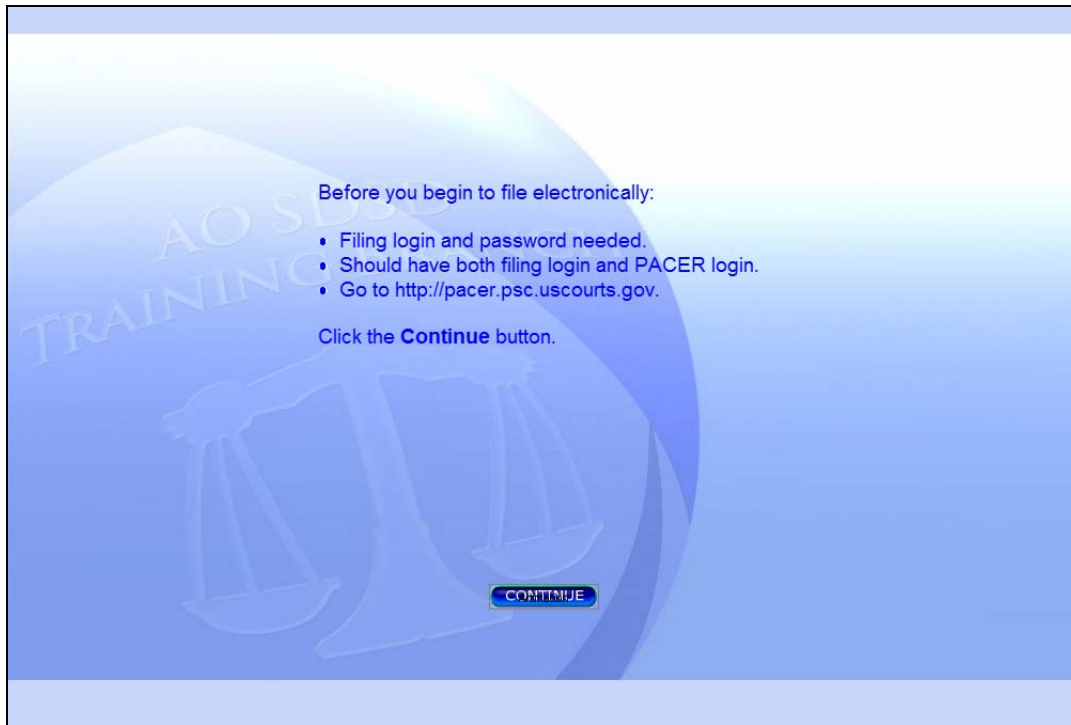

Login to the CM/ECF application.

Recognize the CM/ECF main menu options.

Obtain Help.

Use Windows scroll bars.

Logout.

Click the Continue button.

Filing Login

Slide notes: Before you login to CM/ECF let me mention that you need to obtain a filing login from the PACER Service Center in order to file electronically with the appellate courts. This filing login is in addition to any PACER account login you may already have. In order to fully use the appellate CM/ECF application, you should have both kinds of accounts. You can find the PACER Service Center's web site at http://pacer.psc.uscourts.gov.

Click the Continue button.

Login Screen

Slide notes: In order to connect with the court's CM/ECF application, the first step is to enter the address of the system in your browser. You may want to consider bookmarking this address in your browser so you can access it easily.

The first screen you will see is the Appellate CM/ECF Login screen. On this screen you will enter your assigned Login and Password.

You may also optionally enter a Client Code. This code is to help you keep track of PACER charges for your various clients, but it can be left blank.

Both the login and password fields are case sensitive. This means you must enter them in upper or lower case exactly as they were assigned to you.

Let's begin a simulated login process. In the Login field, type "WernerC", then either press the TAB key or click in the Password field.

Password

Slide notes: When you enter your password, CM/ECF will not display the characters you type but will disguise them.

Enter "Test2006" as your password, then press TAB or click in the Client Code field.
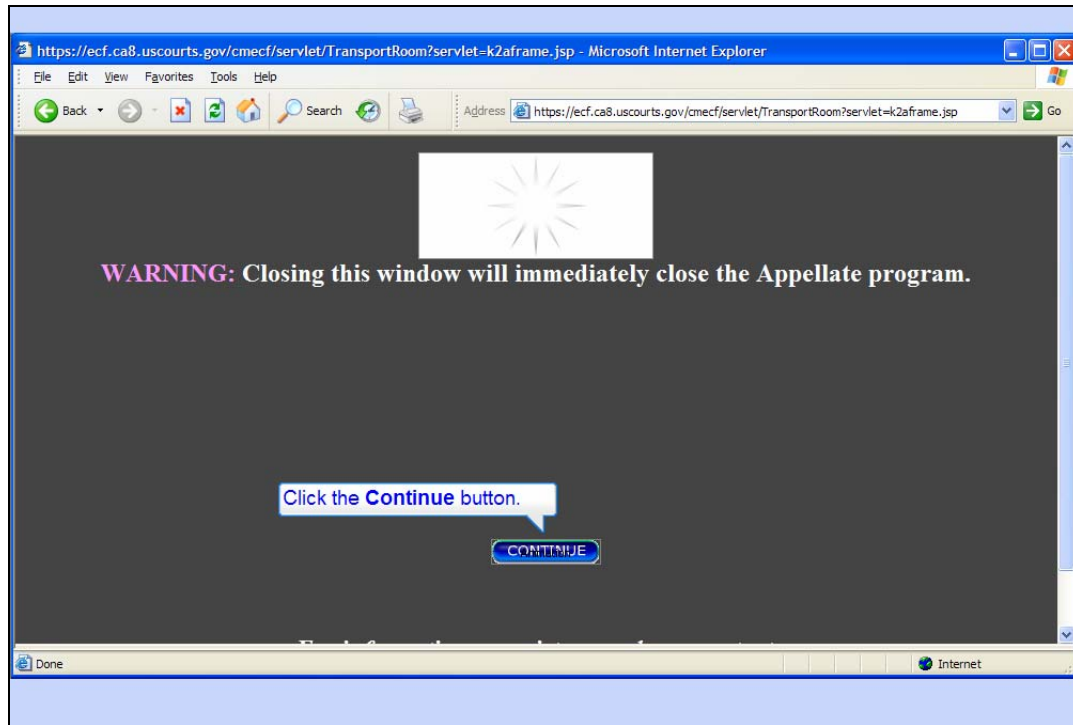
Client Code

Slide notes: Now enter Cunningham as a client code, then either press the Enter key on your keyboard, or click the Login button.
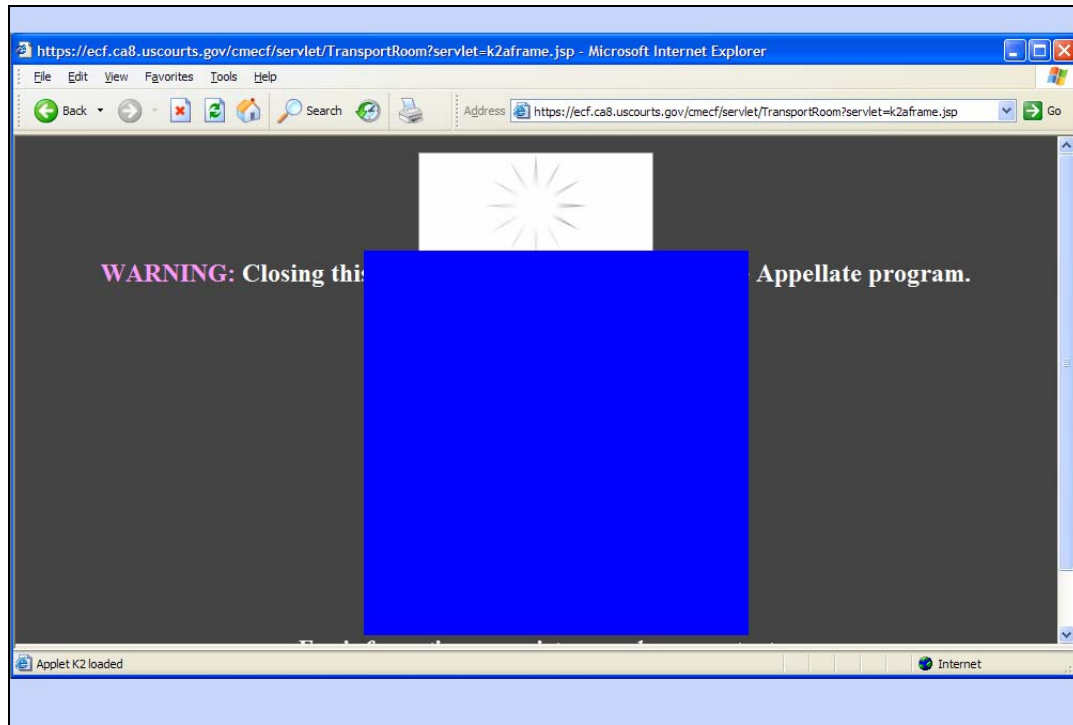
Slide 8
Slide notes: Your browser will show you a Security Information dialog box. Click the Yes button to continue.
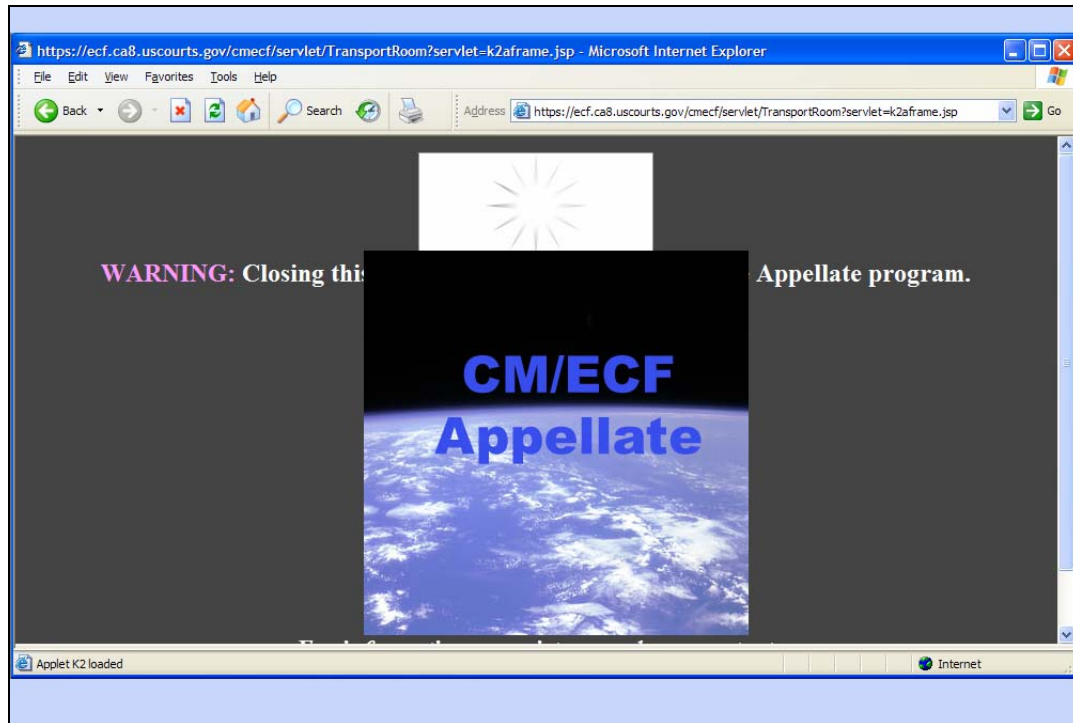
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Slide notes: Let's pause here for a moment. CM/ECF shows you a warning. When the program starts, two windows will be opened in your browser. This window will remain in the background, while a new window will open on top of it. The new window will be the one you use. This background window should not be closed until you're done with CM/ECF. If you do close it, it will close all the currently opened windows in the CM/ECF application.
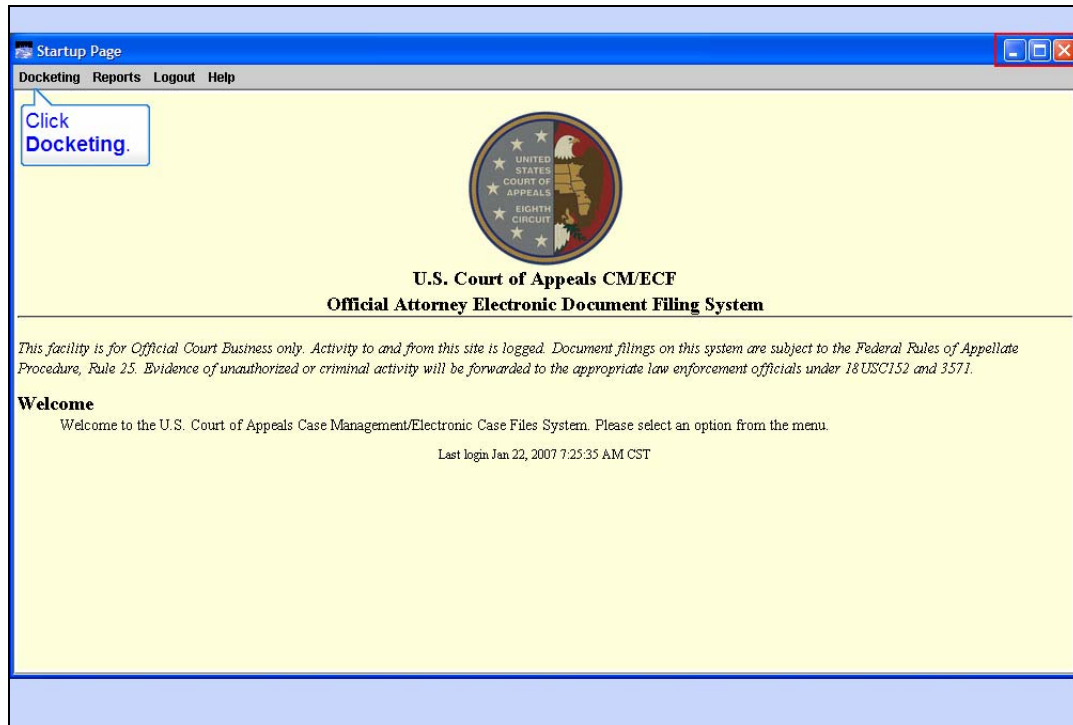
Click the Continue button to resume.

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Slide notes:

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Slide notes:

Startup Page

Slide notes: And the Startup Page window opens.

This is the main window in CM/ECF. Let's take a quick tour of it.

Notice near the middle of the window your last login date and time are displayed.

In the upper right corner of the window are the normal Microsoft Windows controls to minimize, maximize, and close the window.

At the top left of the window is the main CM/ECF menu. These are the four options available to you. In this lesson, we will take a quick look at each of the menu items to see what they contain.
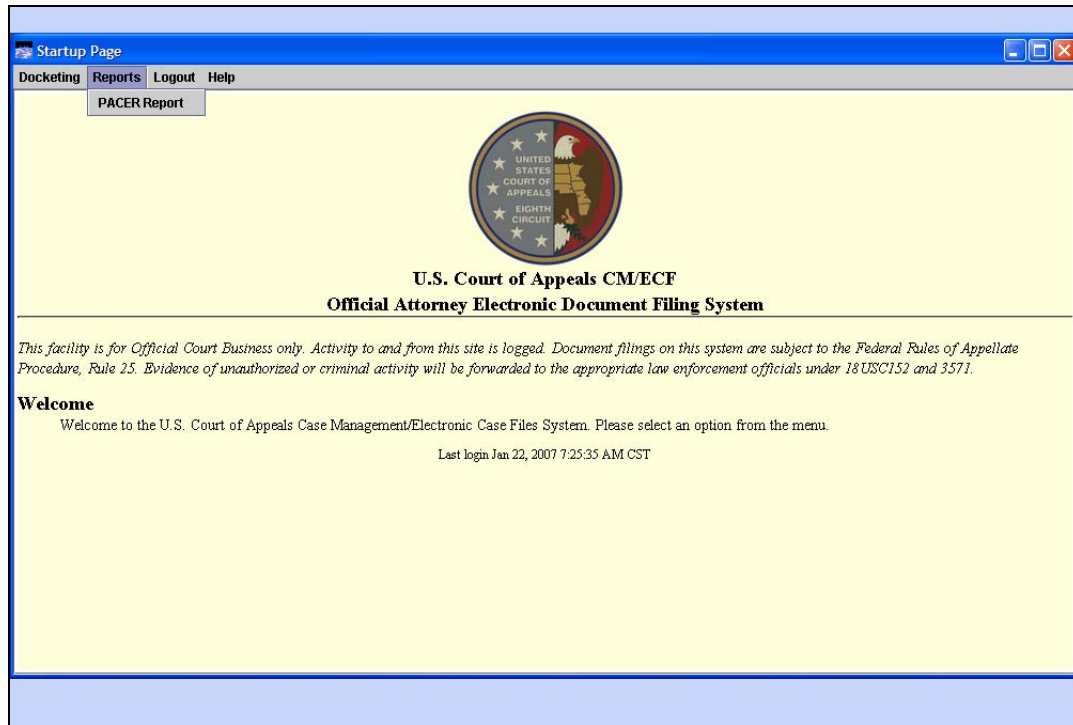
To use the main menu, click on the desired option. For example, click on Docketing in the menu.

Docketing Menu

Slide notes: When you click a main menu option, a drop-down menu will appear. In this instance, the only further option is Docketing. We will explore Docketing in subsequent lesson modules.
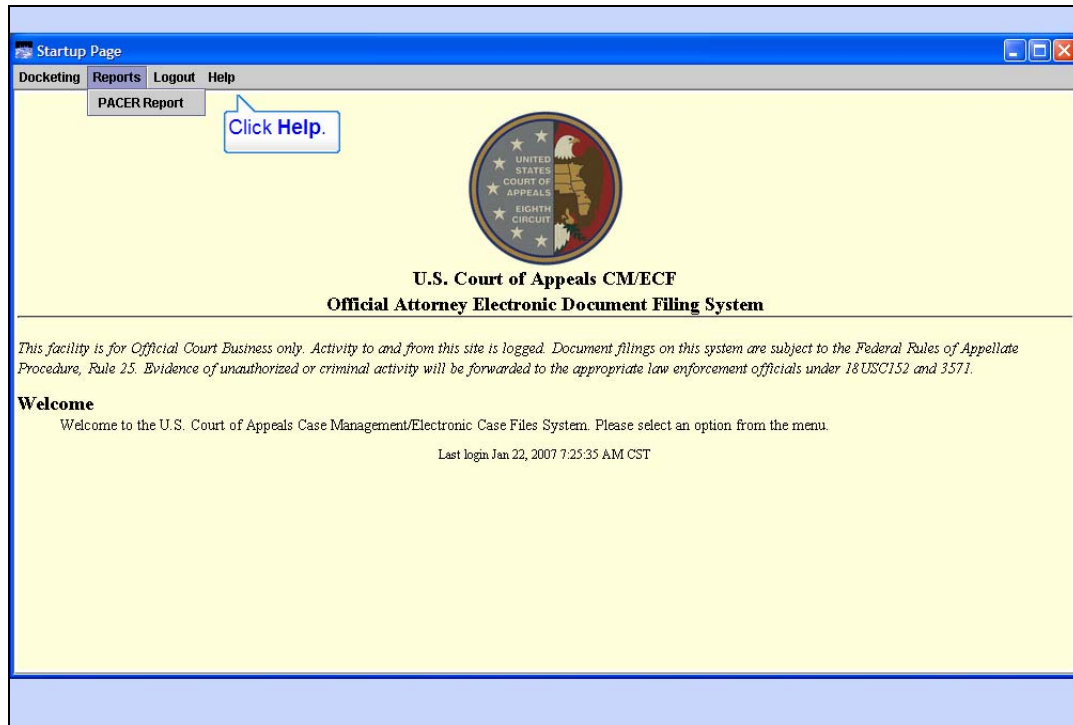

For now, click Reports.

Reports Menu

Slide notes: The menu shows PACER Report as its option. PACER stands for Public Access to Courts Electronic Records, and is managed by the PACER Service Center. Any reports you create will be subject to the PACER public access fee.

Refer to the lesson module on PACER Reports for more information about this.
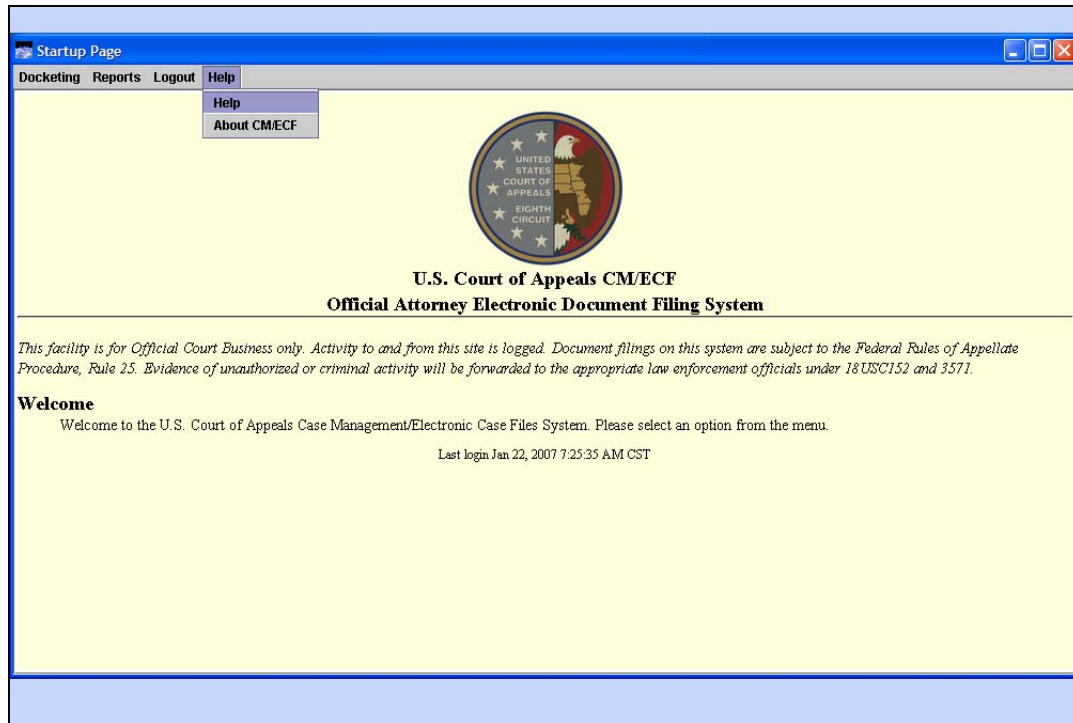
Help

Slide notes: CM/ECF also has help built in. To view it's help feature, click on Help in the menu.
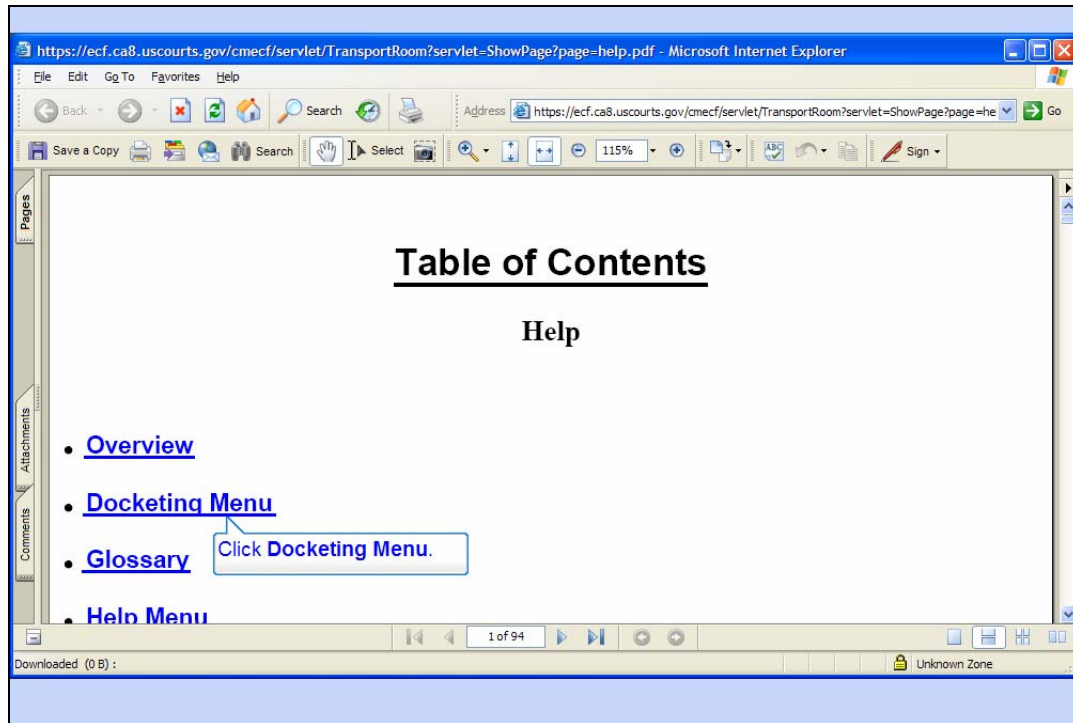
Help Menu

Slide notes: The Help menu has two items, Help and About CM/ECF.

Let's see what help is available first. From the drop-down menu, click Help.
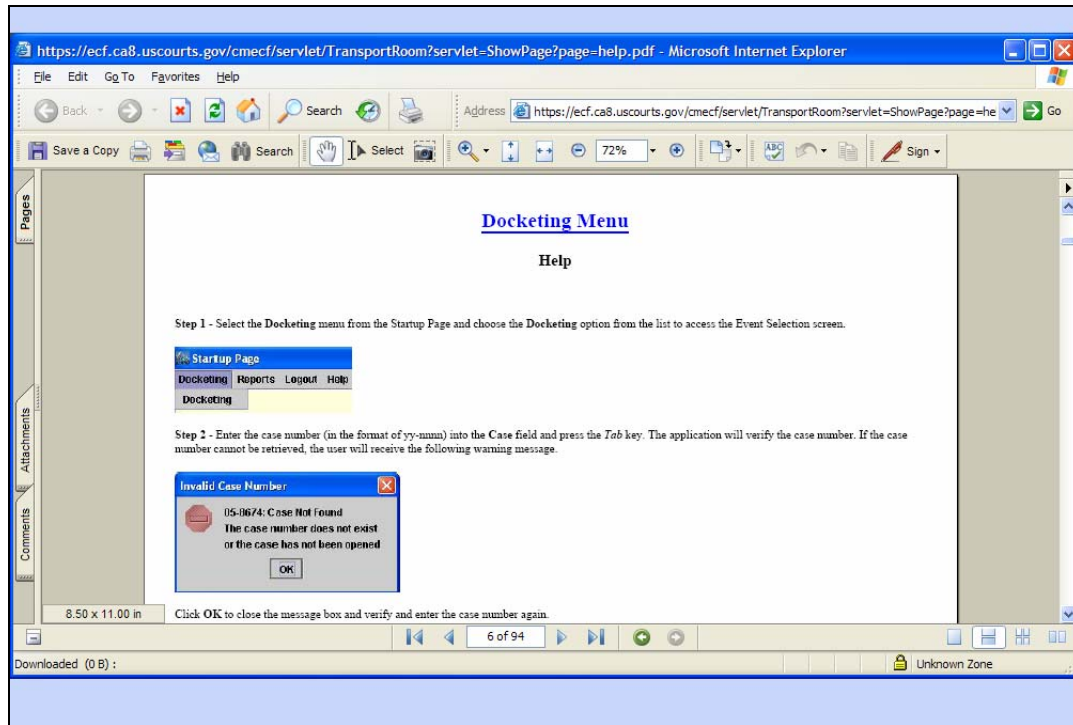
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Slide notes:

Help Table of Contents

Slide notes: A help window opens. This is a multi-page document that explains the various options of CM/ECF. A table of contents is at the top. You can click on an item in the table of contents to jump to that part of the help window.
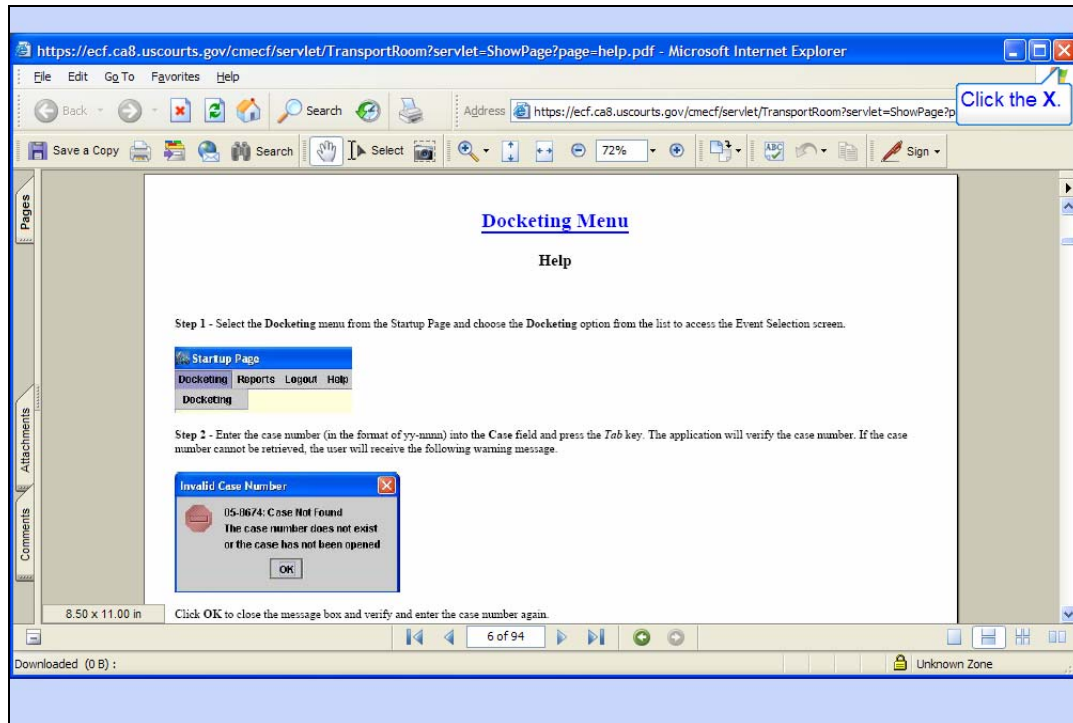
For example, click the hyperlink for Docketing Menu.
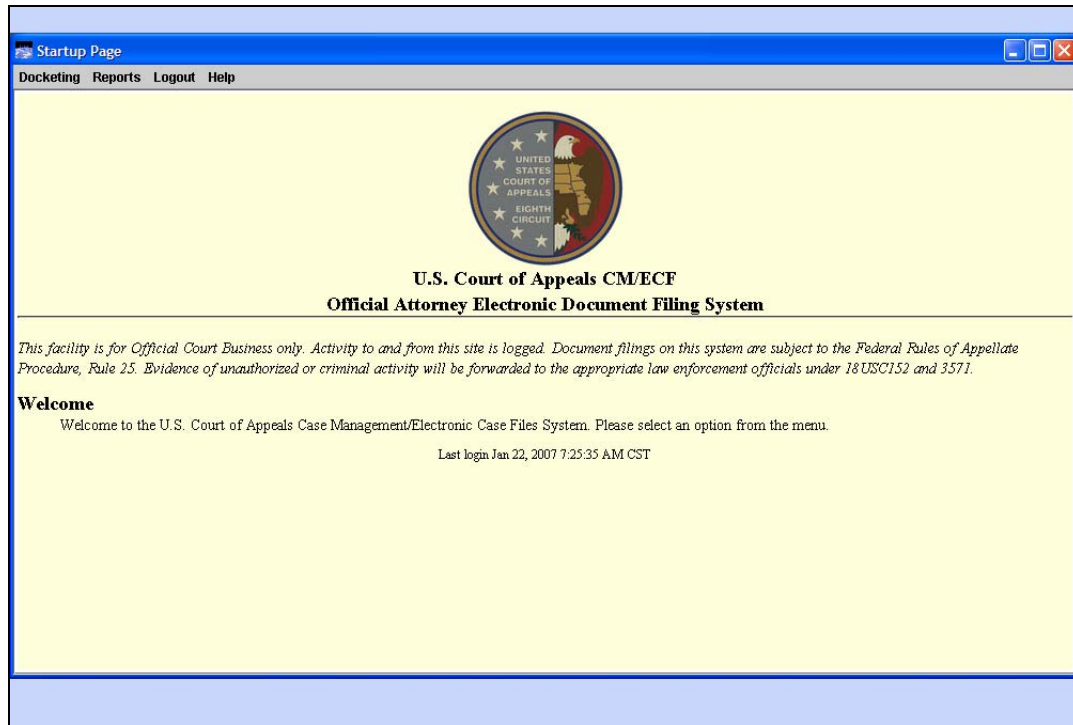
Help 2

Slide notes: CM/ECF jumps down to the page that explains the Docketing Menu.

The Table of Contents at the top can help jump to specific topics, or you can scroll up and down through the help pages.

Close Help
Slide notes: To close the Help window, click its close button in the upper right corner of the window.

Scrolling

Slide notes: As you saw in the help window, and in most browser-based applications, scrolling is sometimes necessary. While we're here, let's discuss scrolling in more detail.

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Slide notes: Here is an example of a CM/ECF screen that has scroll bars.

There will be many occasions in CM/ECF where you need to scroll up or down, or left or right. Any time there is more information than will fit in the current window, CM/ECF will add scroll bars to the window or screen segment. These may be either horizontal or vertical, depending on the size of the window. These scroll bars are standard Windows controls.

To use the scroll bars, you would click the arrow in the scroll bar that points in the direction you want your view to move.

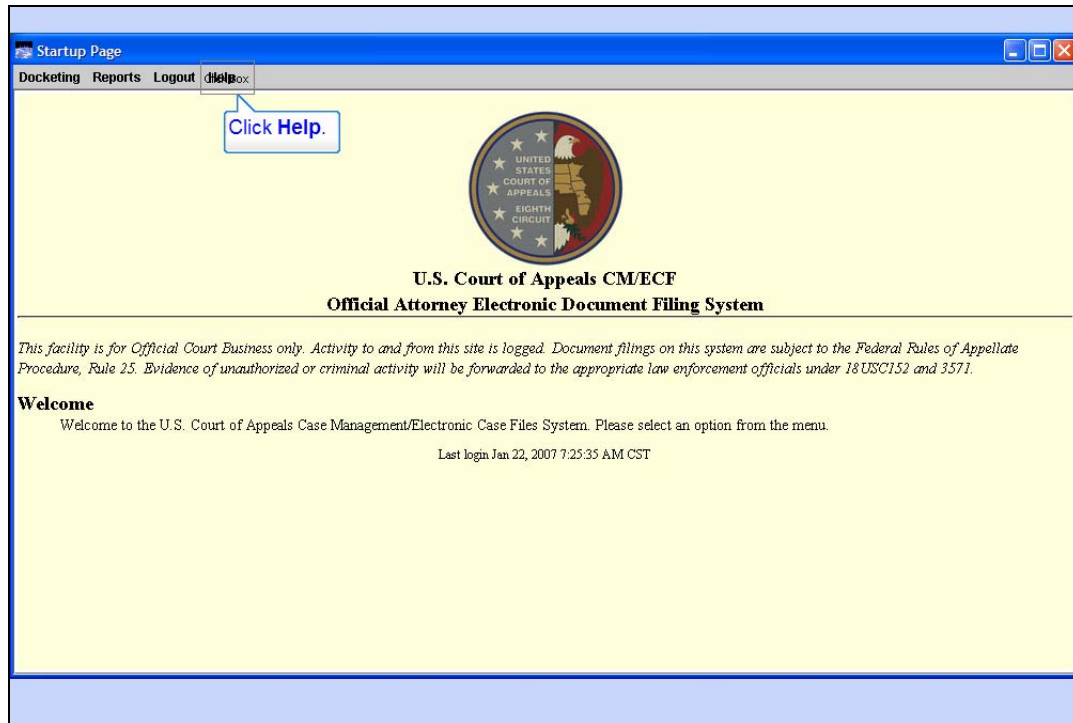To scroll your view of this window down, click the down arrow at the bottom of the scroll bar.

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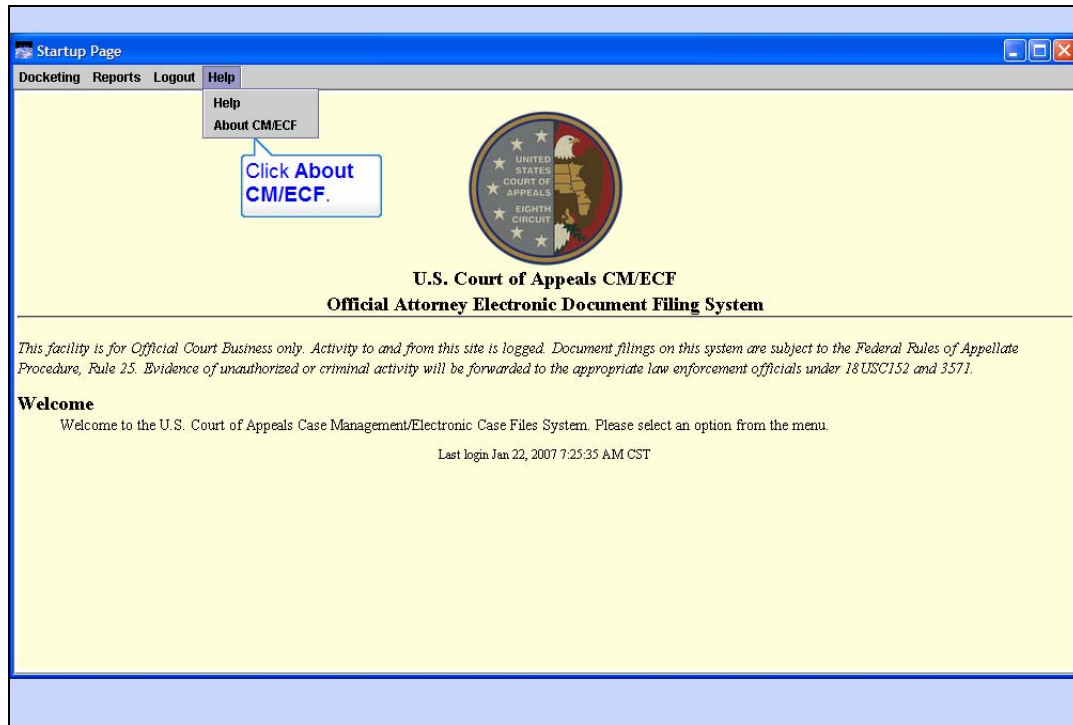Slide notes: And your view has been scrolled down to the bottom of the window.

You'll see this particular screen again in the lesson on Filing an Appearance.

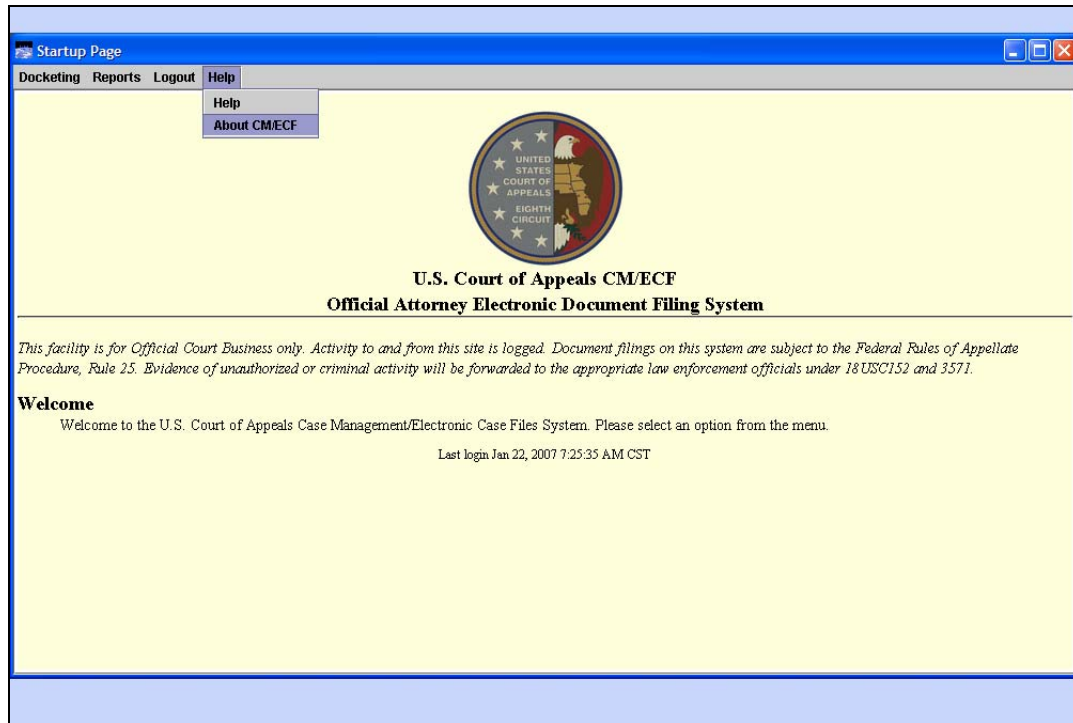
Now let's return to our tour of the CM/ECF main menu.

Other Help Option

Slide notes: Let's look at the other option in the Help Menu. Click Help again.

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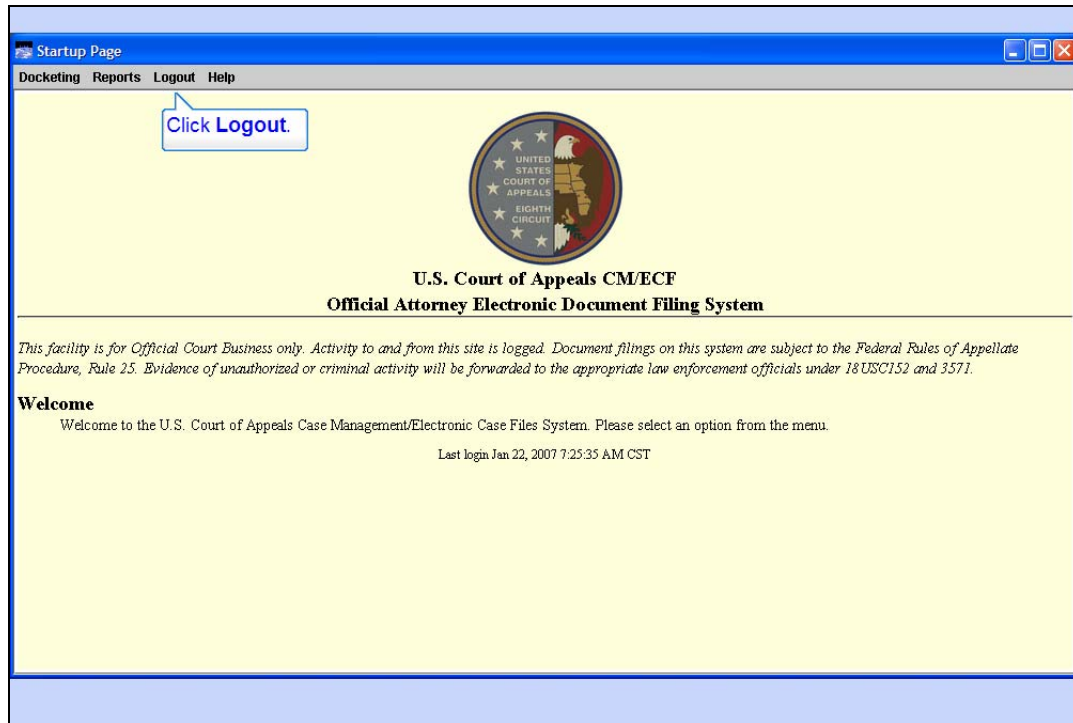Slide notes: Now click About CM/ECF.

About
Slide notes:

Slide 27

Slide notes: CM/ECF pops up a window which shows you the current version of the CM/ECF application.
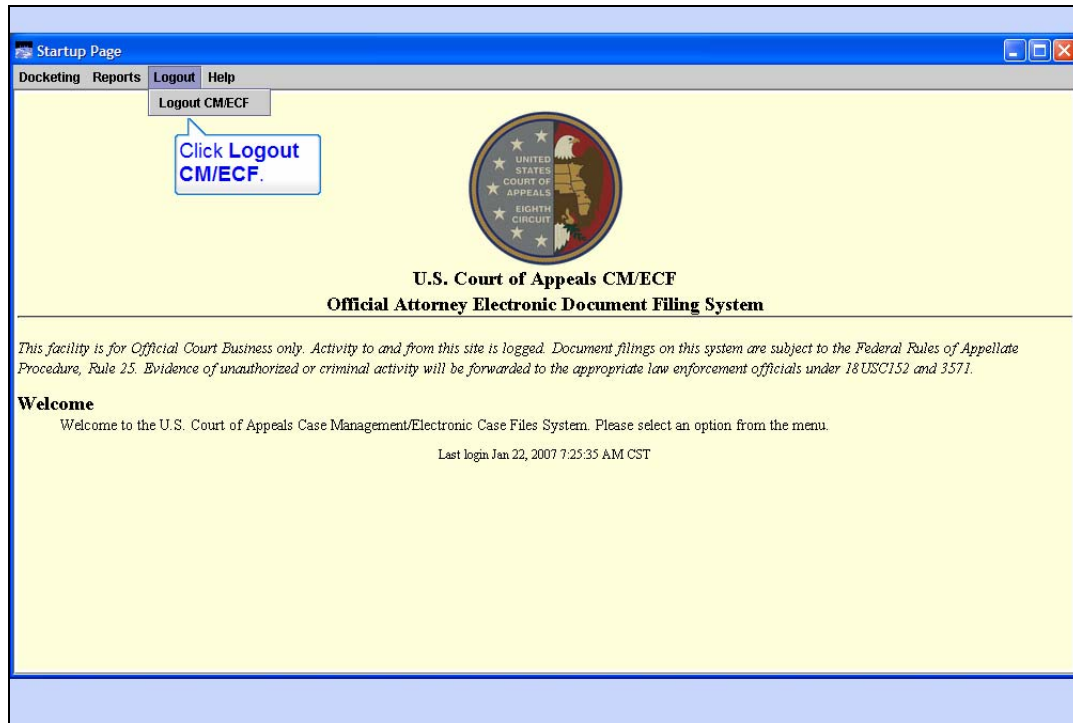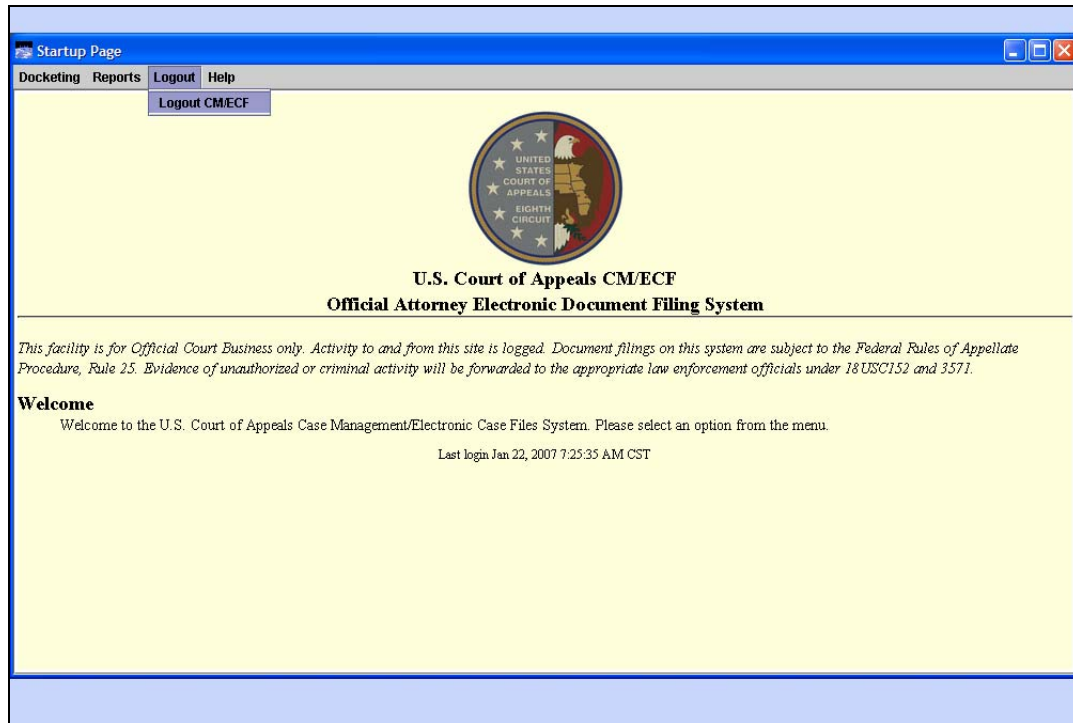
Close the window by clicking OK.

Logout

Slide notes: And that was a quick tour of the CM/ECF menu. The only option left is Logout.

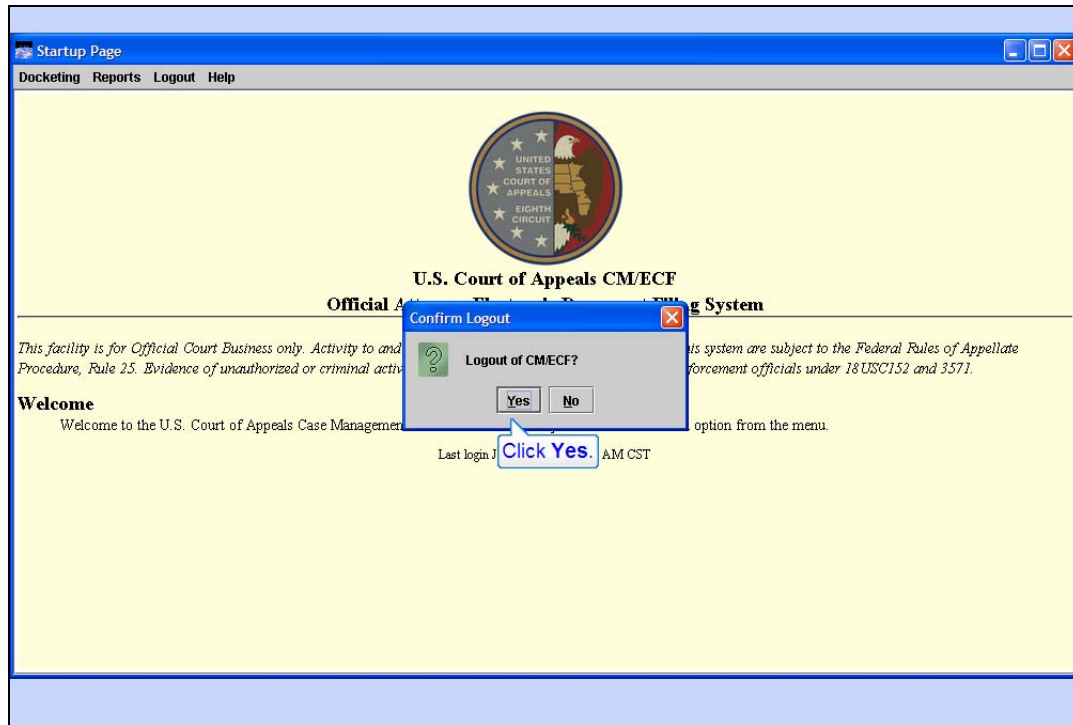You should always remember to log out when you're done. To do so, click Logout in the menu.

Logout Menu
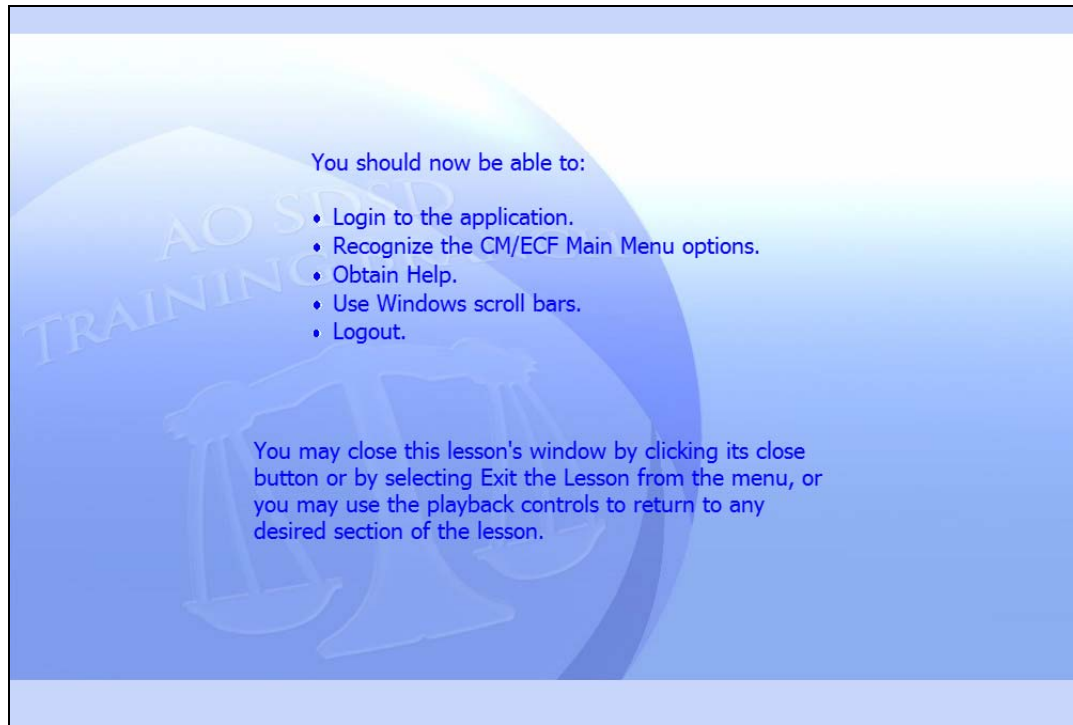Slide notes: Now click Logout CM/ECF.

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Slide notes:

Logout OK

Slide notes: Confirm you want to logout by clicking Yes.

Summary

Slide notes: This concludes the Introduction to CM/ECF lesson module.

You should now be able to:

Login to the application.

Recognize the CM/ECF Main Menu options.

Obtain Help.

Use Windows scroll bars.

Logout.

You may close this lesson's window by clicking its close button or by selecting Exit the Lesson from the menu, or you may use the playback controls to return to any desired section of the lesson.

Exit
Slide notes: Goodbye