

CASE MANAGEMENT/ELECTRONIC CASE FILING TRAINING FOR ATTORNEYS

Training Time: 4 hours

Faculty: Victoria C. Minor, Esq., Chief Deputy Clerk/ CM/ECF Project Manager, U.S. District Court; Tanya M. Graham, Assistant IT Manager, U.S. District Court

Materials to be distributed during training:

- U.S. District Court CM/ECF Policies and Procedures
- Dictionary of events for attorneys
- Instructional materials on performing electronic filing

Course outline:

1. Getting Started
 - Introduction
 - help desk
 - capabilities of the system
2. Requirements
 - computer hardware and software needed
 - overview of PACER requirements
3. Consequences of filing electronically
 - Notice of Electronic Availability of Case File Information
4. Passwords
5. Preparation
 - Form and size of documents

 - Handling sensitive information
6. Setting up Acrobat PDF Reader
 - portable document format (PDF)
 - how to view a PDF file
 - how to convert documents to PDF format
 - from Corel WordPerfect 8.0 or higher
 - from Microsoft Word 2000 or higher
7. The CM/ECF System
 - How to access the system

- logging in
- procedures when system is unavailable

-Overview of the CM/ECF menus and screens

-Civil and Criminal

- Service of Process
- Answers to Complaints
- Other Answers
- Motions and related filings
- Responses and replies
- Filing attachments to documents
- Other filings
- Service of electronically filed documents
- Excepted documents
- Notice of manual filing
- Sealed documents
- Signatures
- Correcting a mistake
- How to handle attachments and exhibits in paper format
- Refining the description of a document
- Submitting proposed orders
- Filing other types of documents
- E-Mail notification when documents or court orders are filed
 - how to save a document to your local hard drive
 - how to open a document from an e-mail notification

-Criminal

- Waivers
- Plea related documents
- Limitations on access to documents

-Utilities

- Generating a docket sheet
- Generating other reports
- Viewing your transaction log
- Maintaining your user account
 - setting up e-mail notification