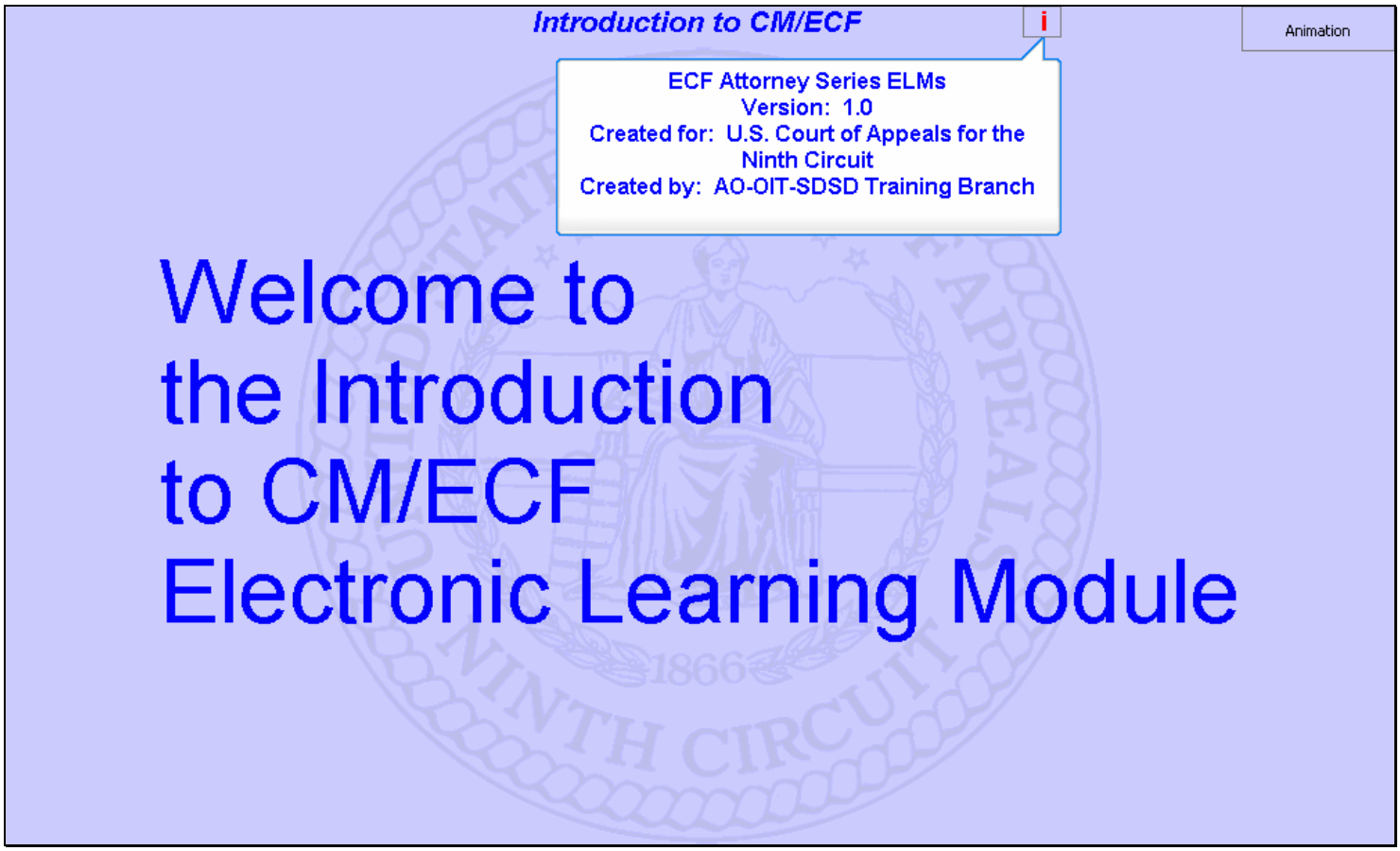
Slide 1 - Welcome

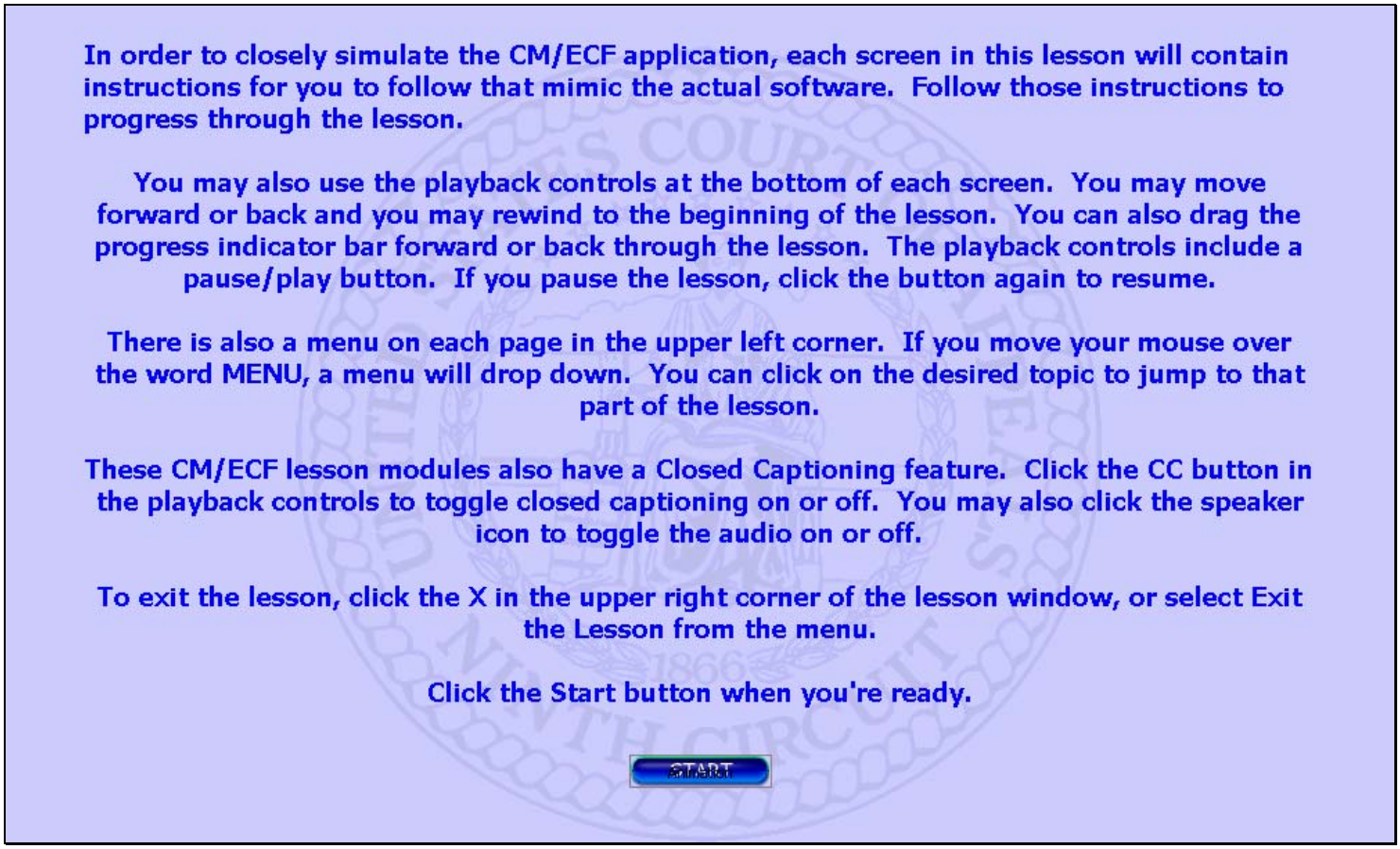


Slide notes

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.

Slide 2 - Navigation



Slide notes

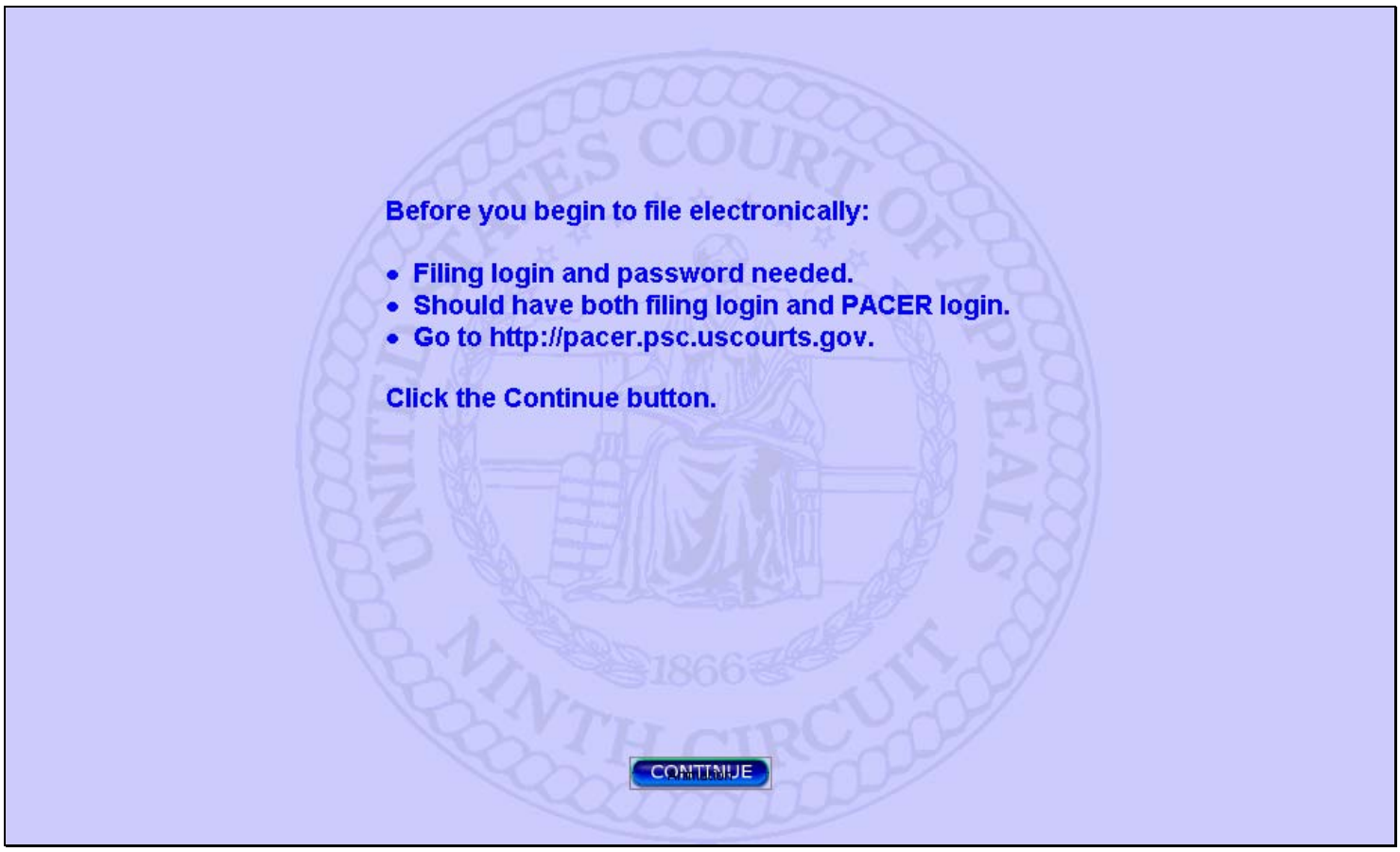
These are the instructions for how to navigate through this lesson module. When you're ready, click the Start button to begin the lesson.

Slide 3 - Objectives

Slide notes

Here are the objectives for this lesson. These are the things you will be able to do when you complete this lesson. When you're ready, click Continue.

Slide 4 - Filing Login

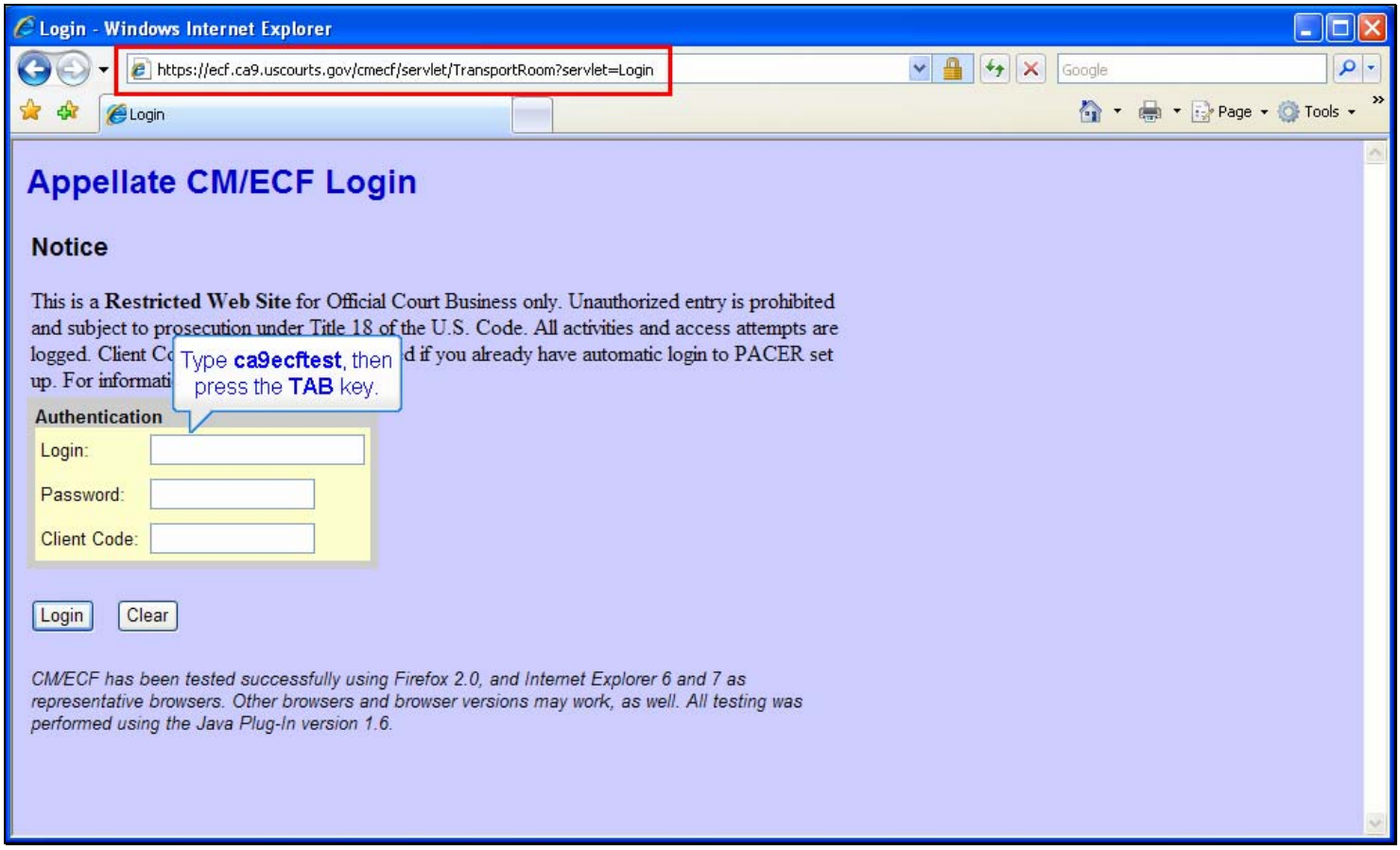


Slide notes

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.

Slide 5 - 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 adding this address to your favorites 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 "ca9ecftest", then either press the TAB key or click in the Password field.

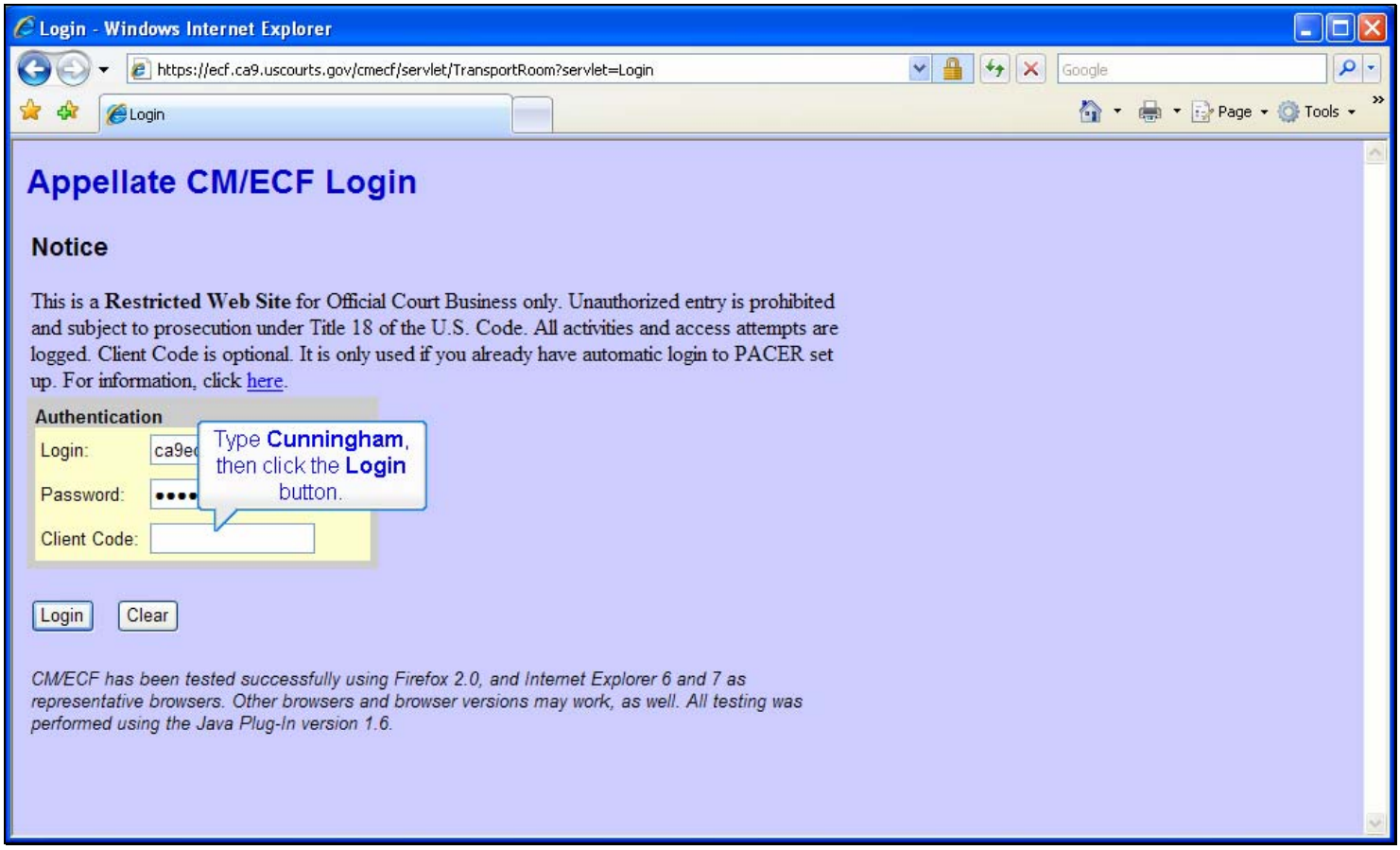
Slide 6 - Slide 6

Slide notes

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

Enter "Passwordtest", with a capital P, as your password, then press TAB or click in the Client Code field.

Slide 7 - Slide 7



Slide notes

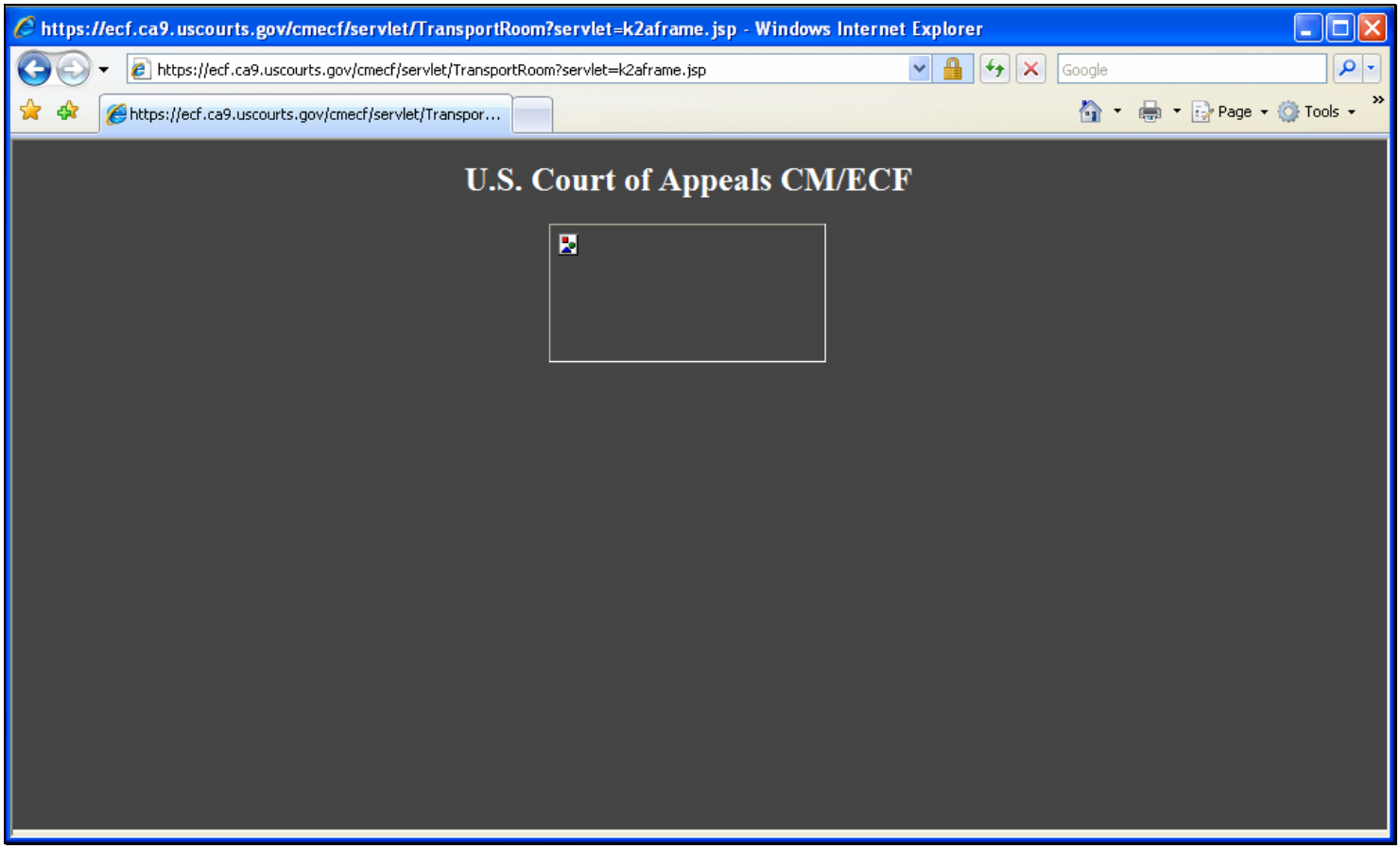
Now enter Cunningham as a client code, then either press the Enter key on your keyboard, or click the Login button.

Slide 8 - Slide 8

Slide notes

(Note: This is a transitional slide.)

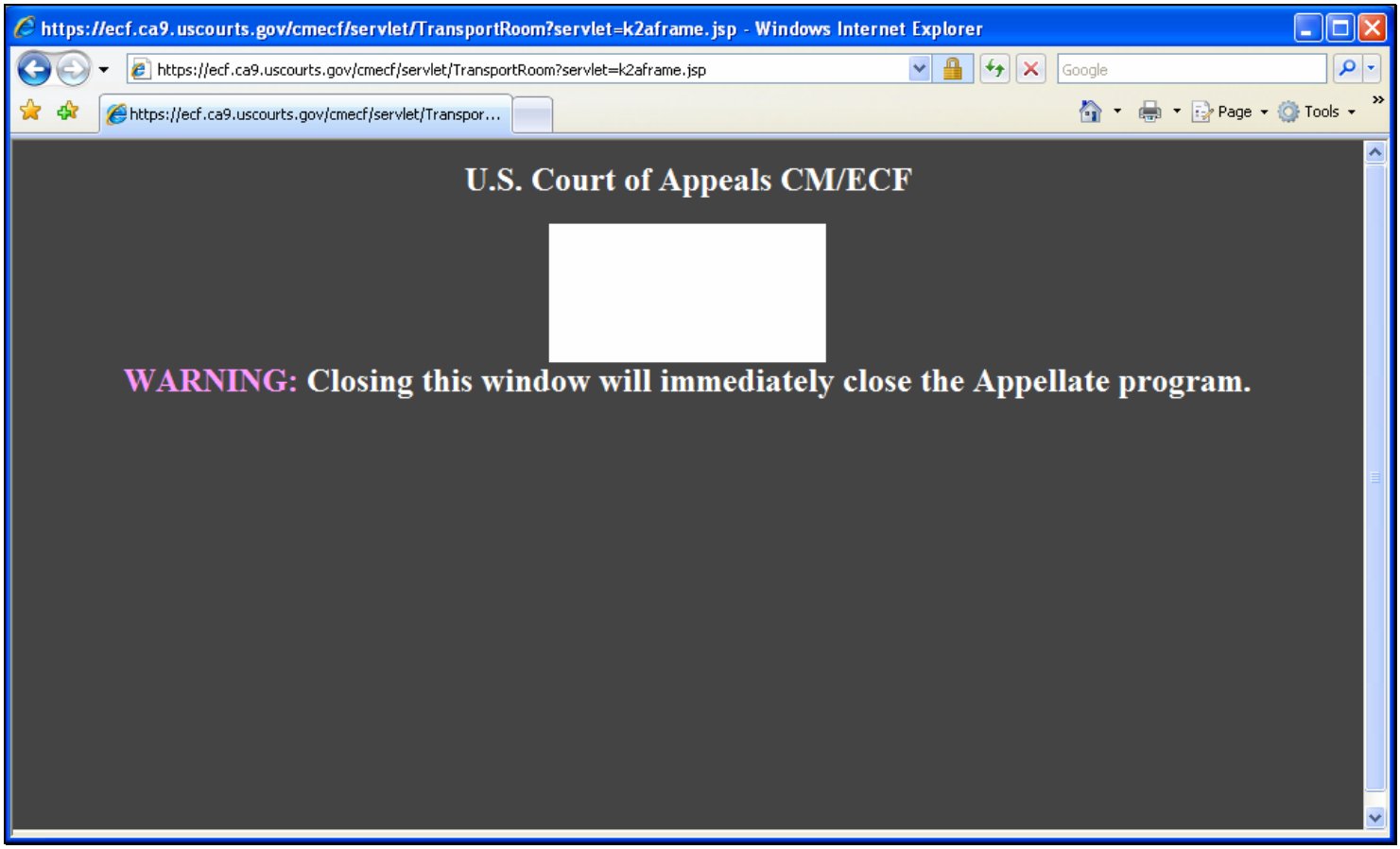
Slide 9 - Slide 9



Slide notes

(Note: This is a transitional slide.)

Slide 10 - Slide 10



Slide notes

(Note: This is a transitional slide.)

Slide 11 - Slide 11

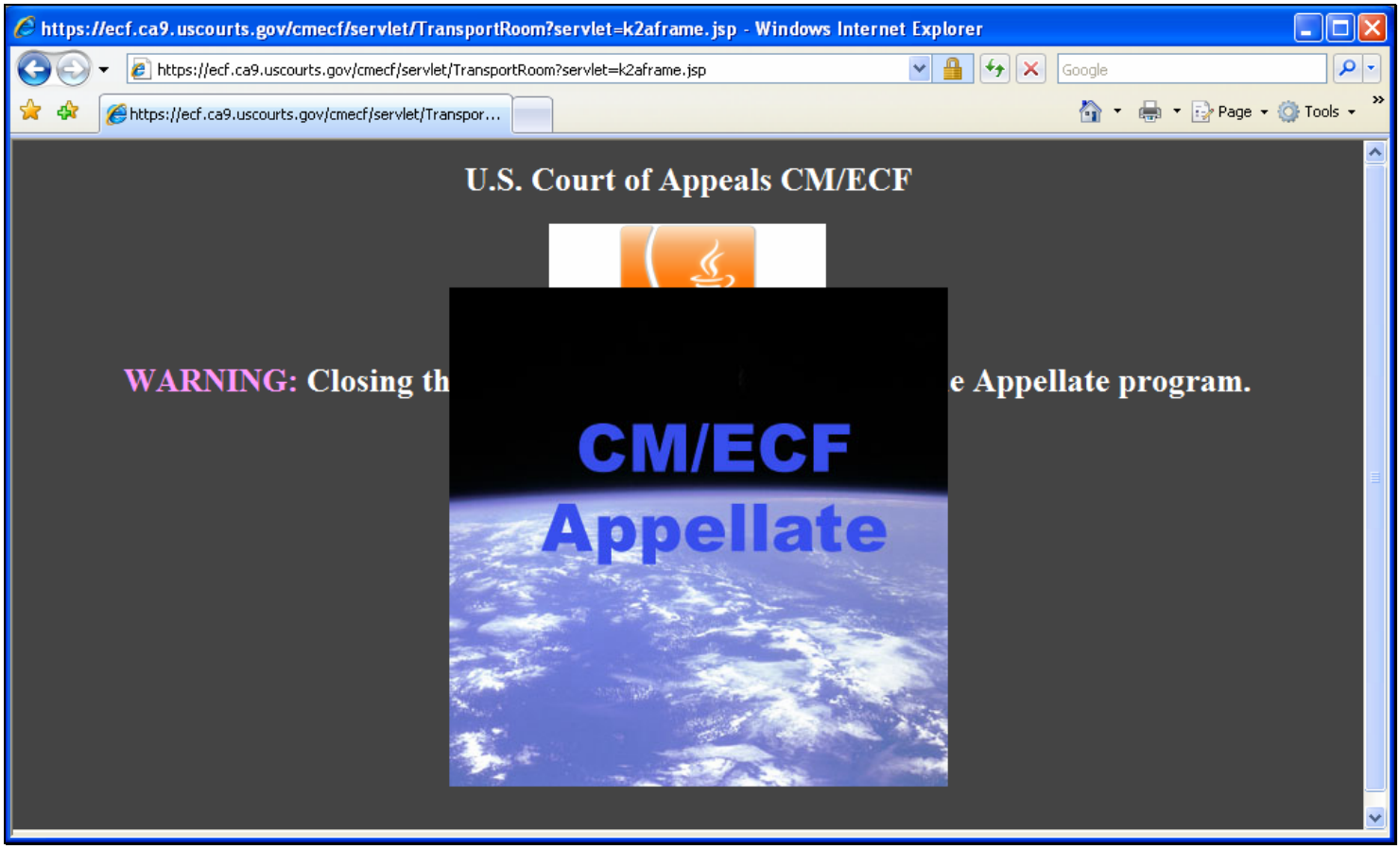
Slide notes

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.

Also, while CM/ECF is loading, your browser may show you some security messages. These messages may be about ActiveX controls or scripting. If your browser does prompt you about these, you should choose the options that will allow these browser features to work.

Click the Continue button to resume.

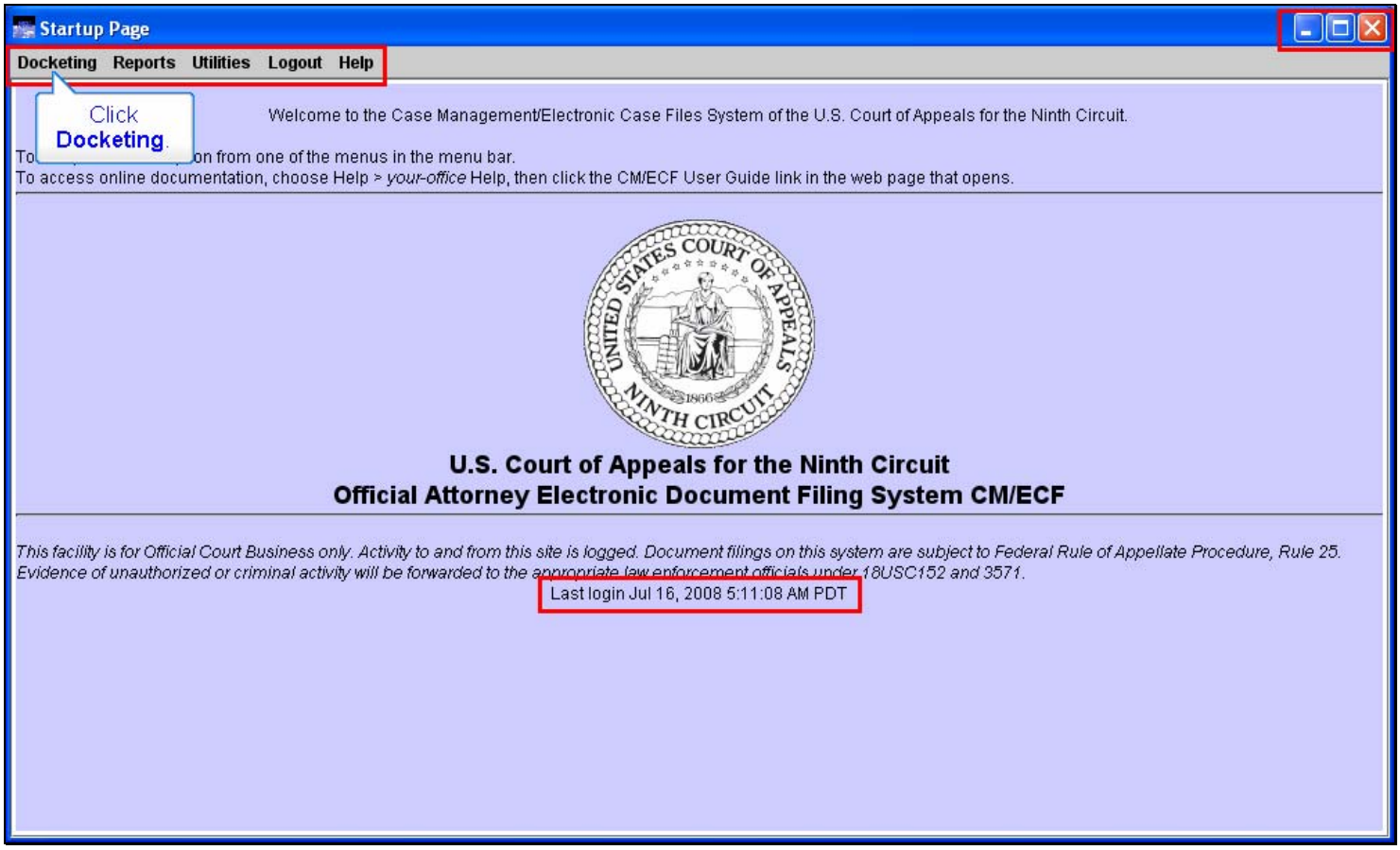
Slide 12 - Slide 12



Slide notes

(Note: This is a transitional slide.)

Slide 13 - Slide 13



Slide notes

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

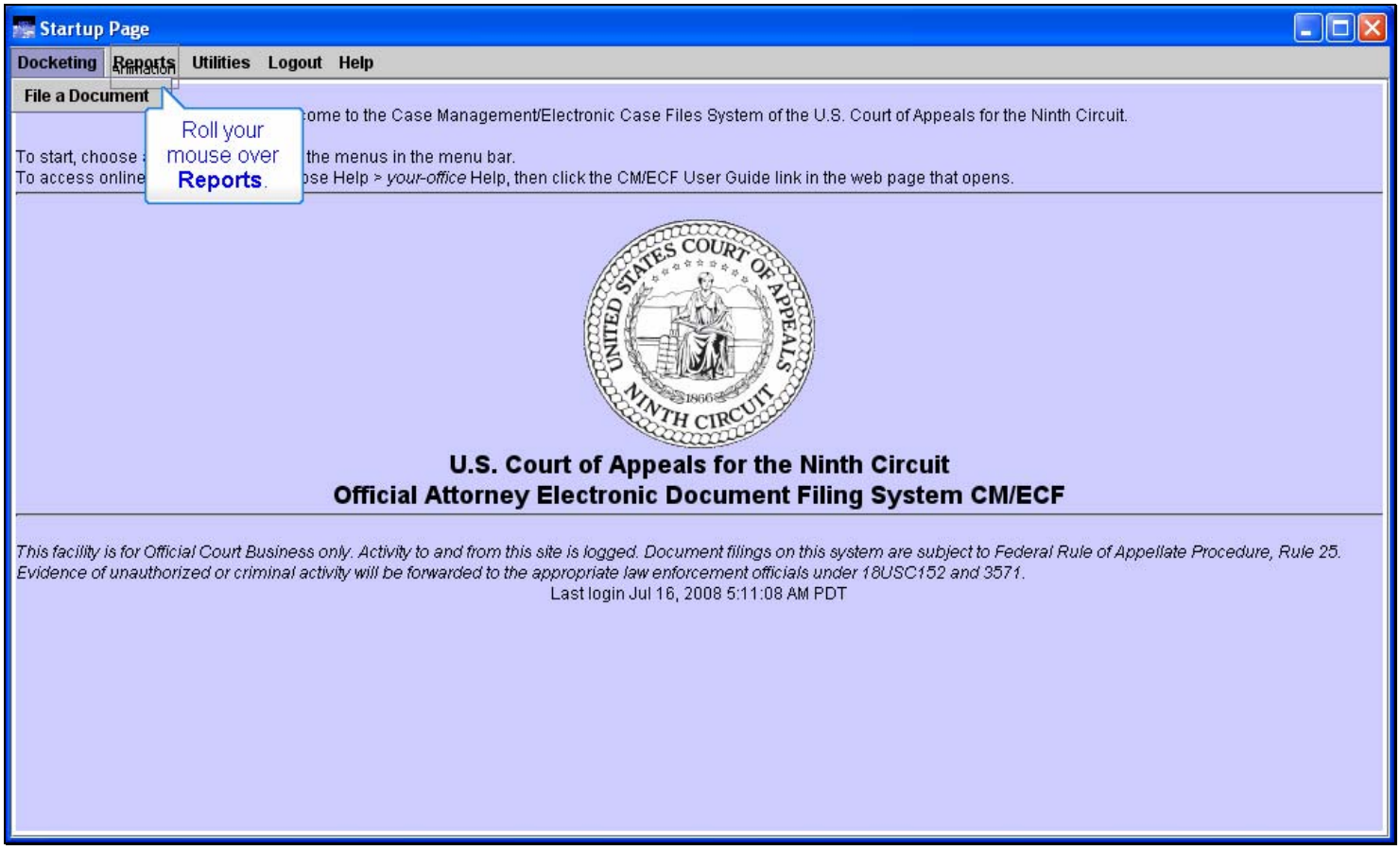
Notice near the middle of the window your last login date and time are displayed.

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 five 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.

Slide 14 - Slide 14

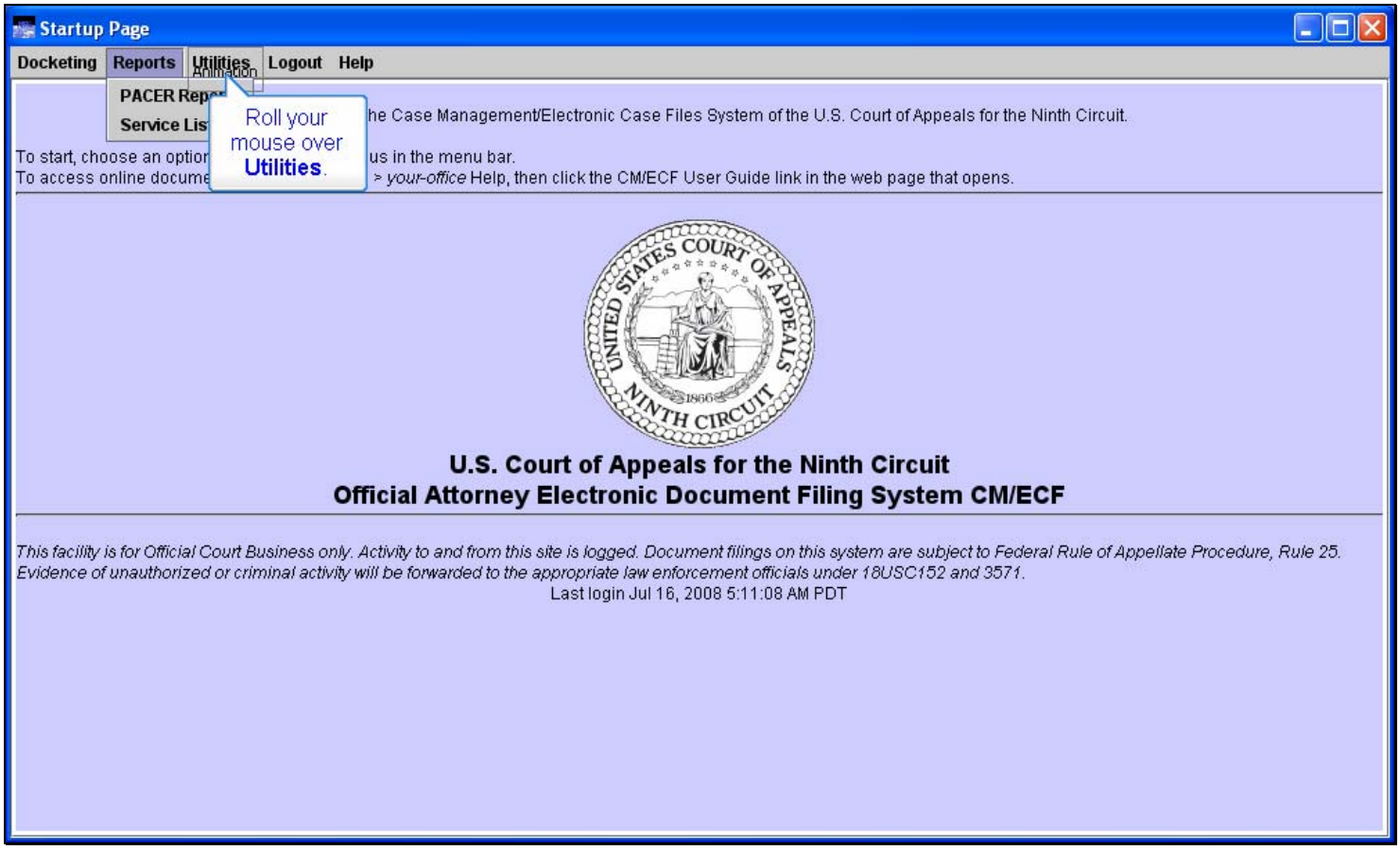


Slide notes

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

For now, roll your mouse over Reports.

Slide 15 - Slide 15



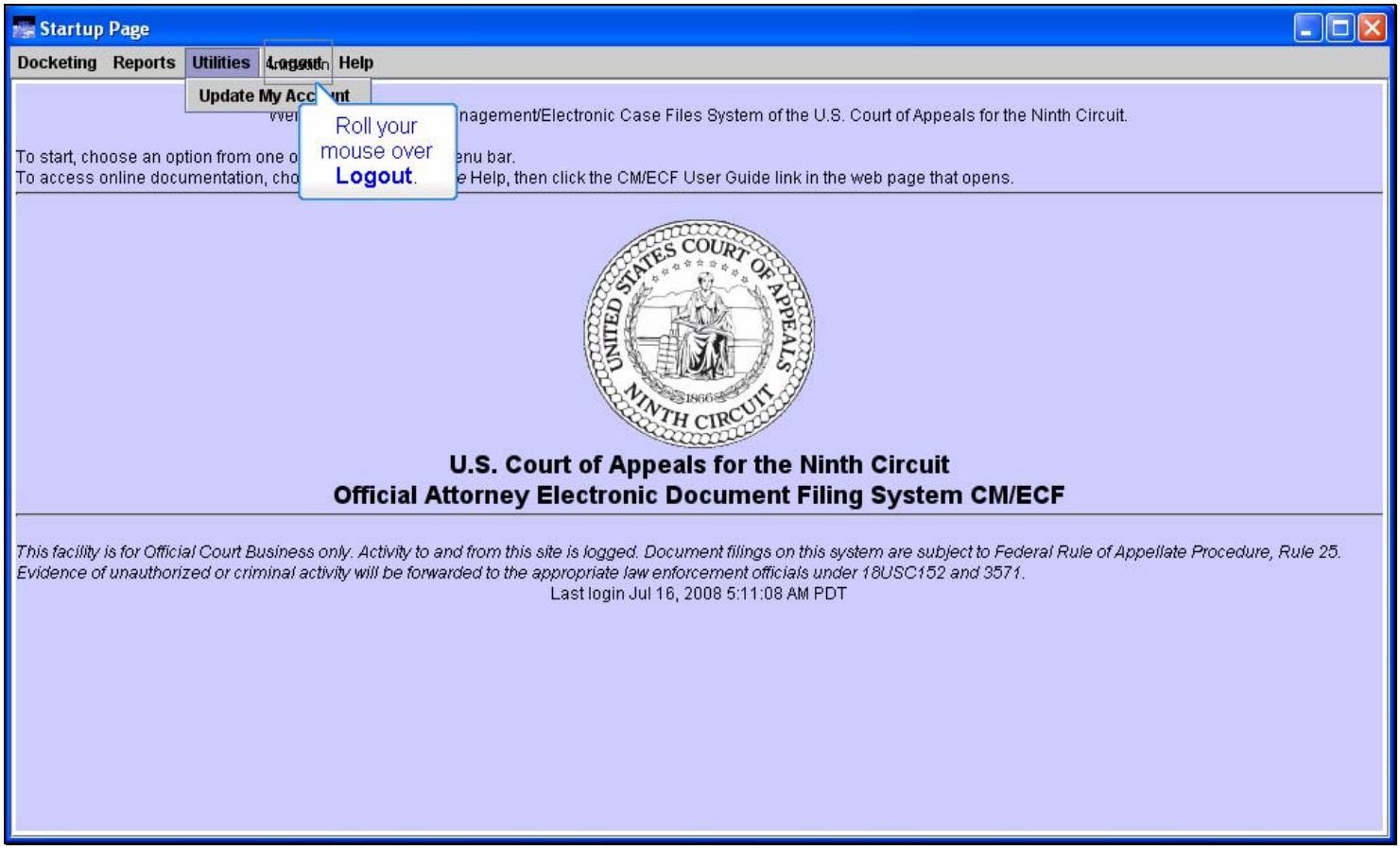
Slide notes

The menu shows PACER Report and Service List as its options. 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. Service List lets you generate a service list for a case in which you are a participant.

Refer to the lesson module on PACER Reports for more information about that menu item.

Now roll your mouse over Utilities.

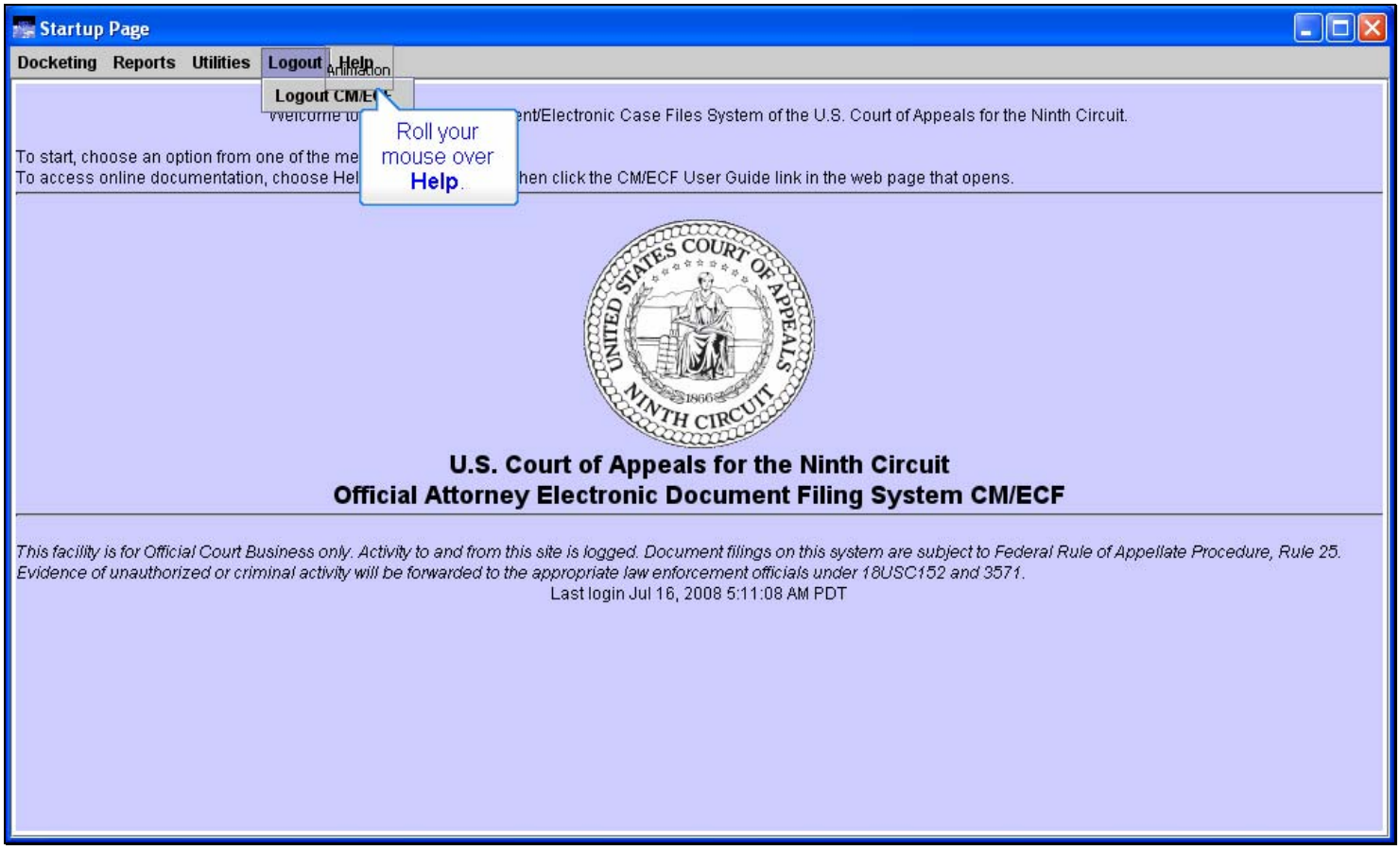
Slide 16 - Slide 16



Slide notes

The option under Utilities is for you to update your CM/ECF account information. Next, roll your mouse over Logout.

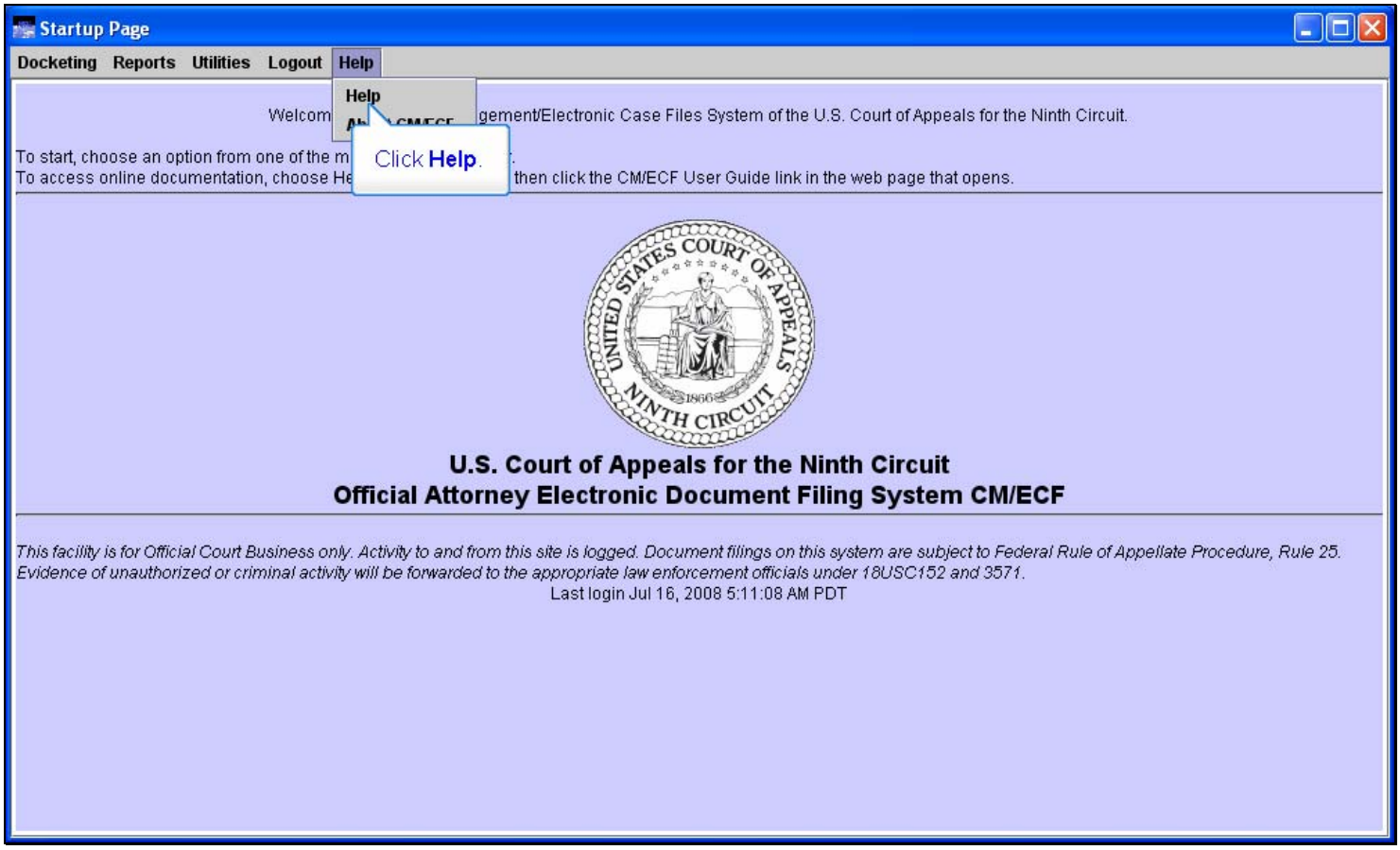
Slide 17 - Slide 17



Slide notes

The next item in the menu is the Logout option. You should always remember to logout when your done with your CM/ECF session. We'll do that in just a few minutes. For now, roll your mouse over Help.

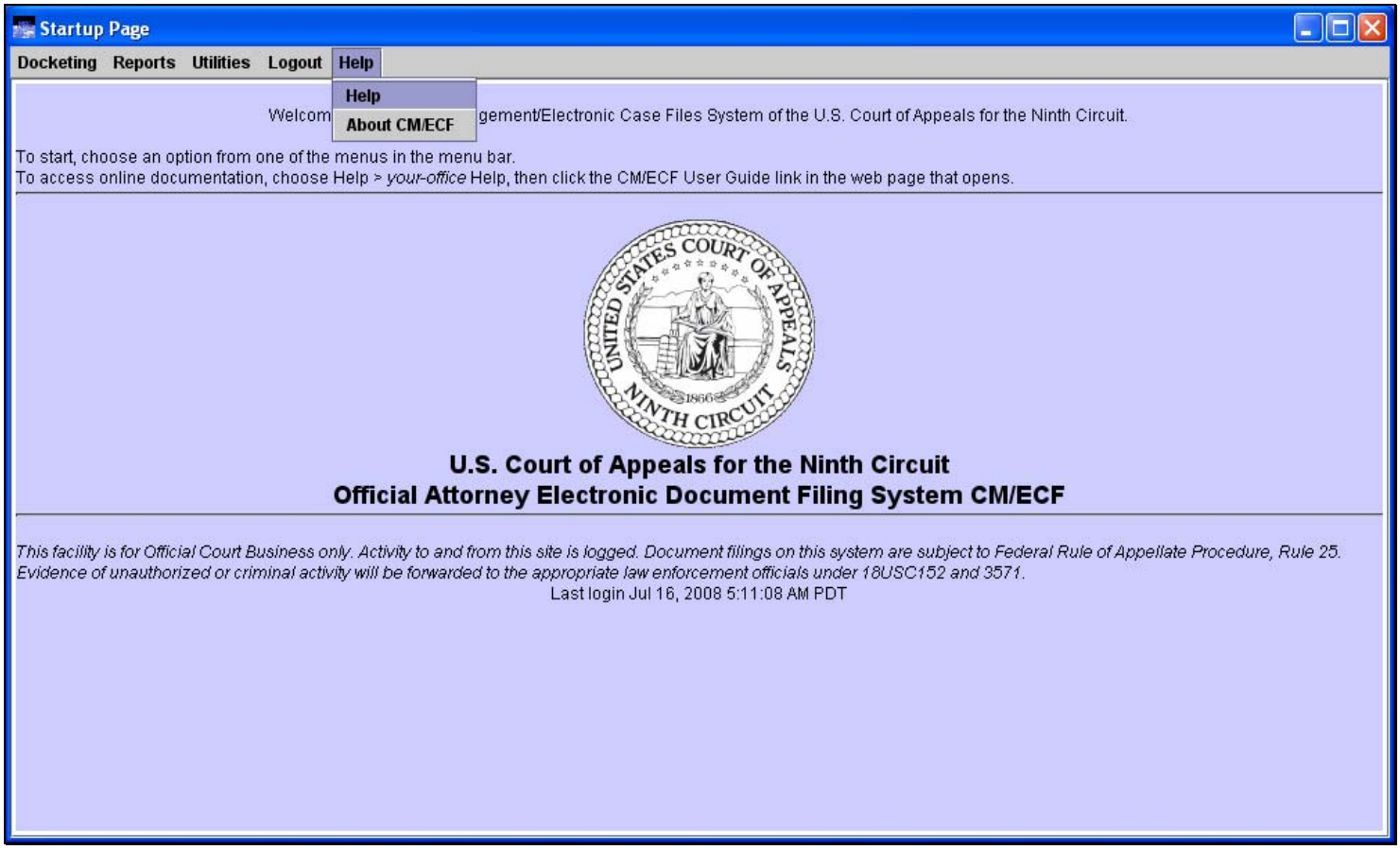
Slide 18 - Slide 18



Slide notes

The help menu item has two options, Help, and About CM/ECF. The Help option provides you with access to the built-in help feature. Let's see what that looks like. Click Help in the drop-down menu.

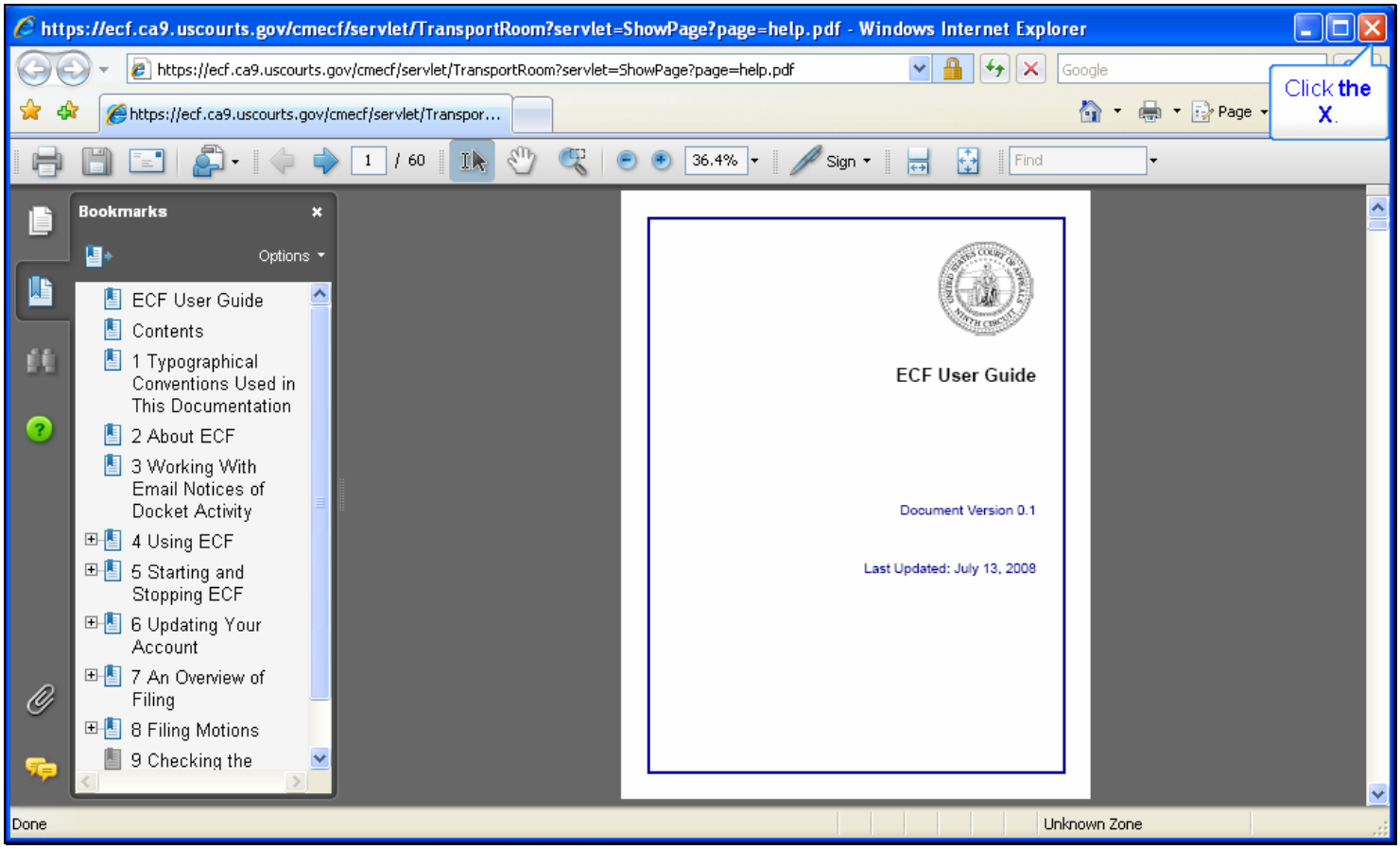
Slide 19 - Slide 19



Slide notes

(Note: This is a transitional slide.)

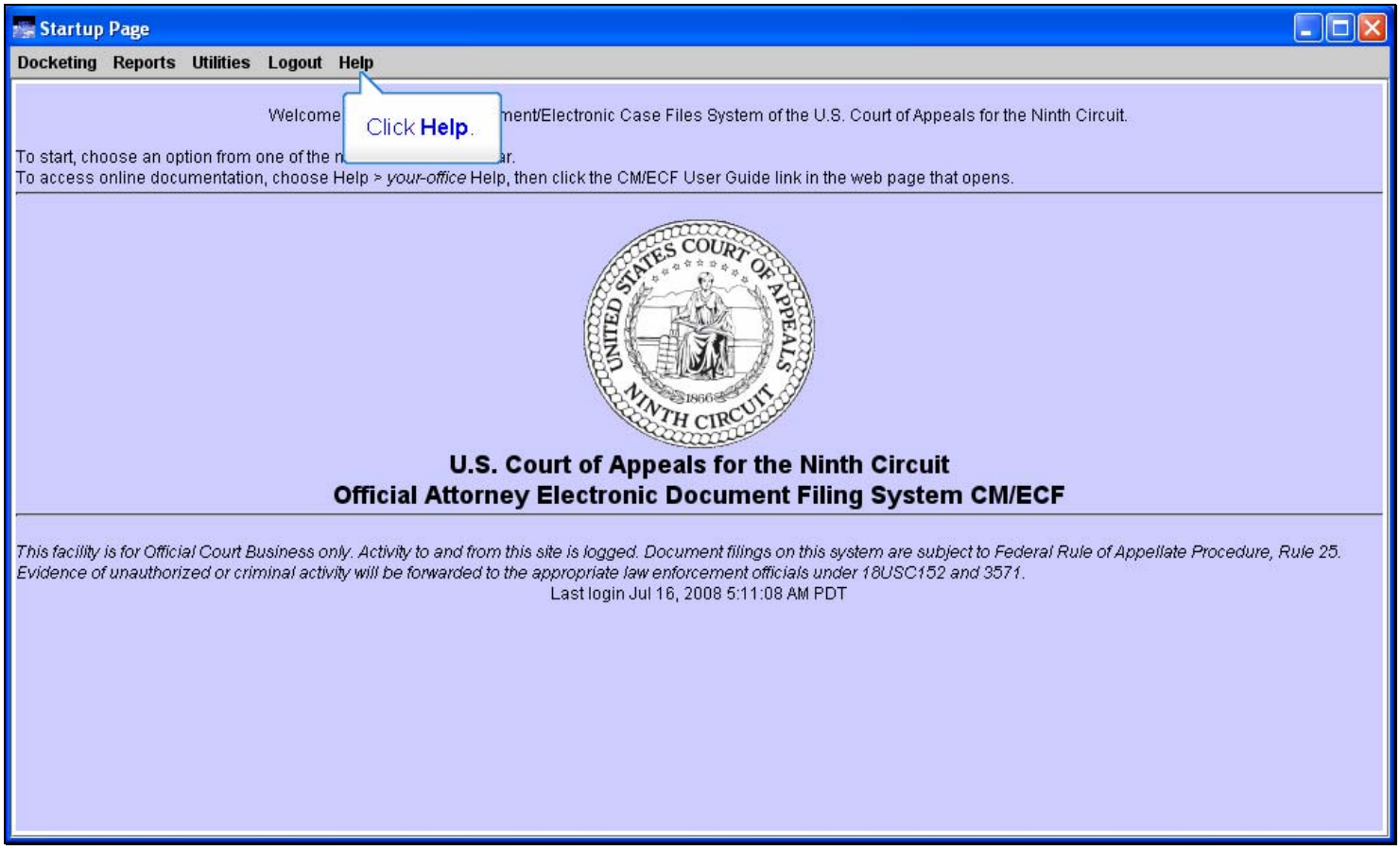
Slide 20 - Slide 20



Slide notes

The ECF User Guide opens in a new window. This PDF document provides you with help about how to use the CM/ECF application. A copy of this document is also posted on the 9th Circuit's web site. For now, close this window by clicking the X in its upper-right corner.

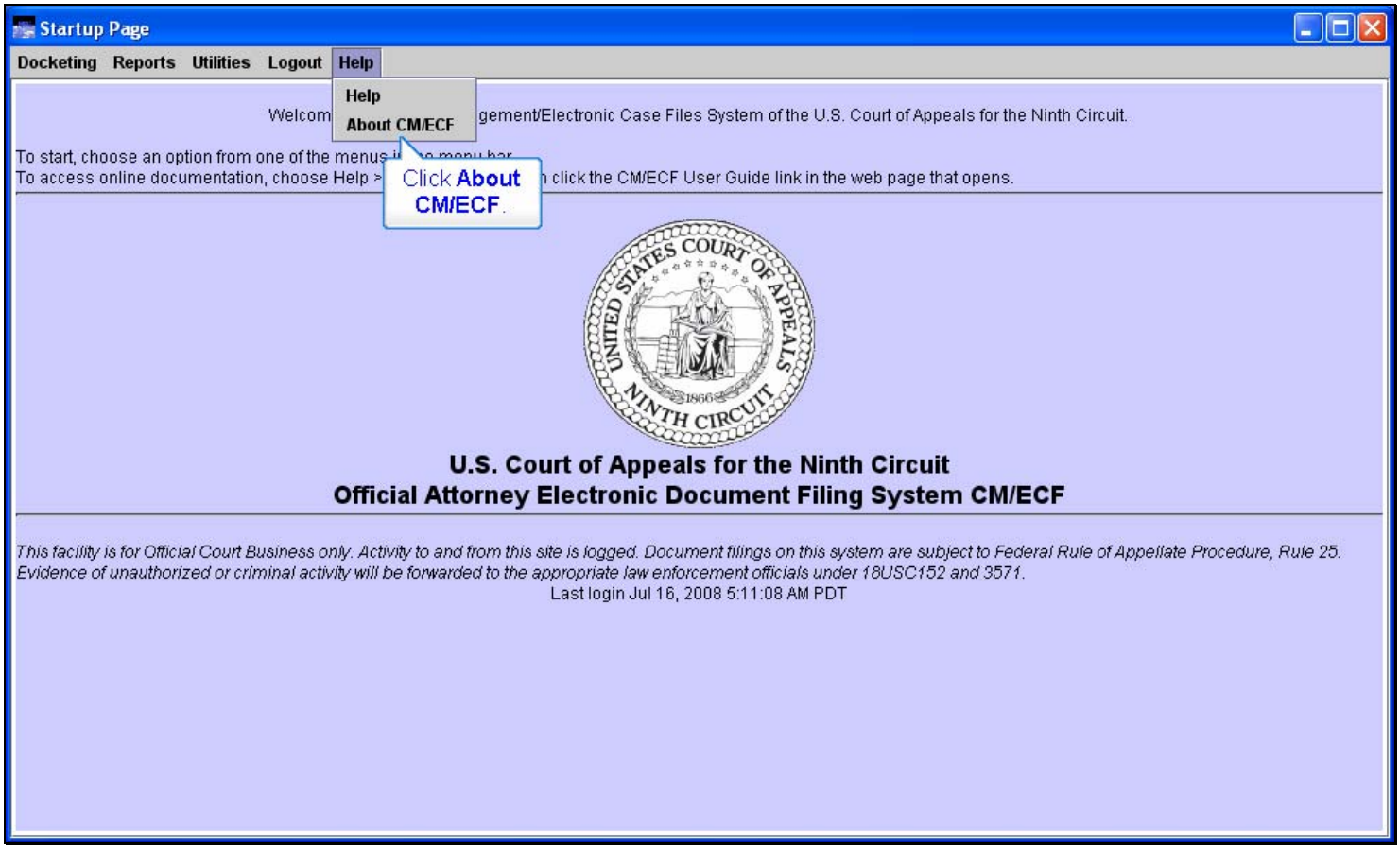
Slide 21 - Slide 21



Slide notes

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

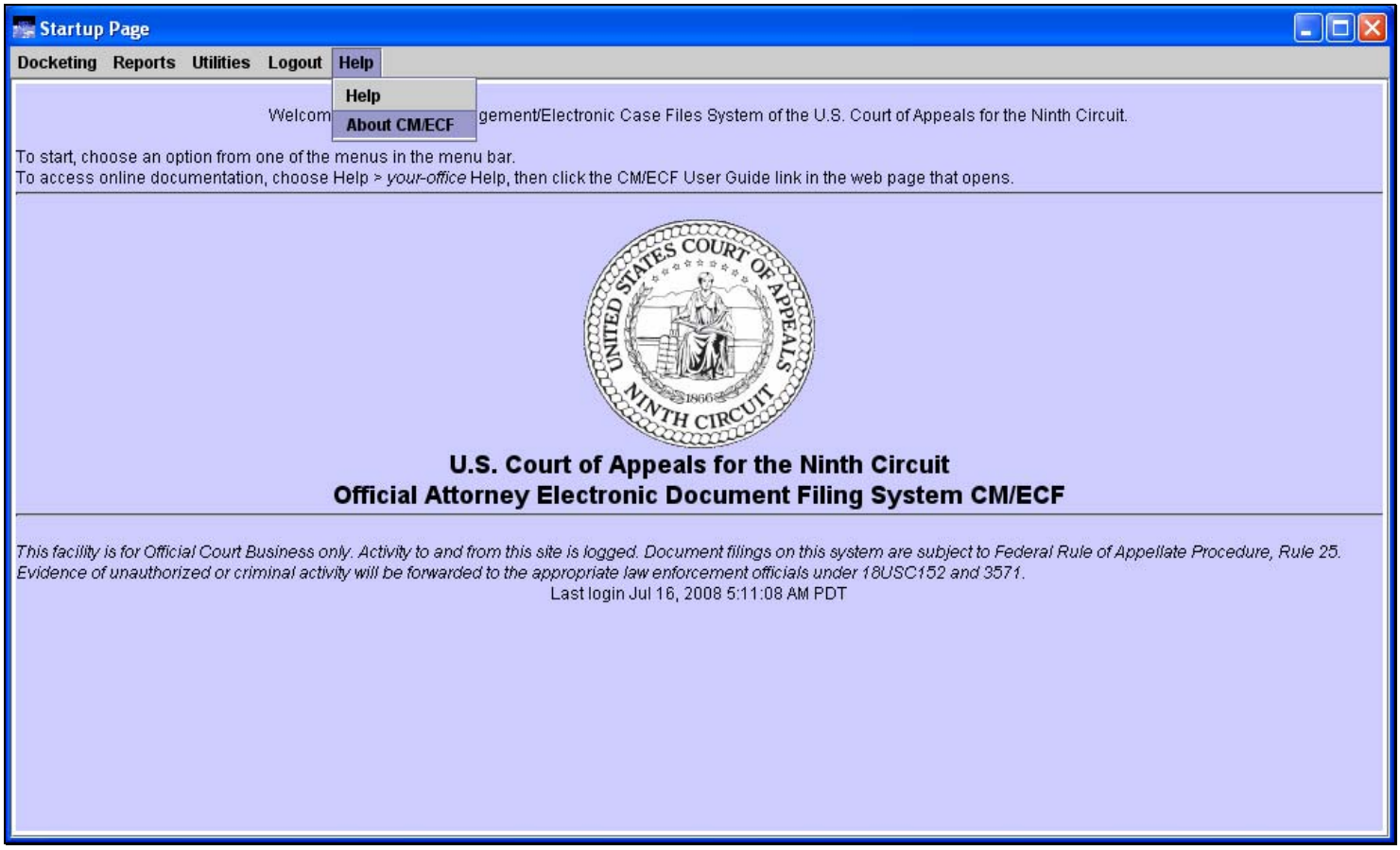
Slide 22 - Slide 22



Slide notes

Now click About CM/ECF.

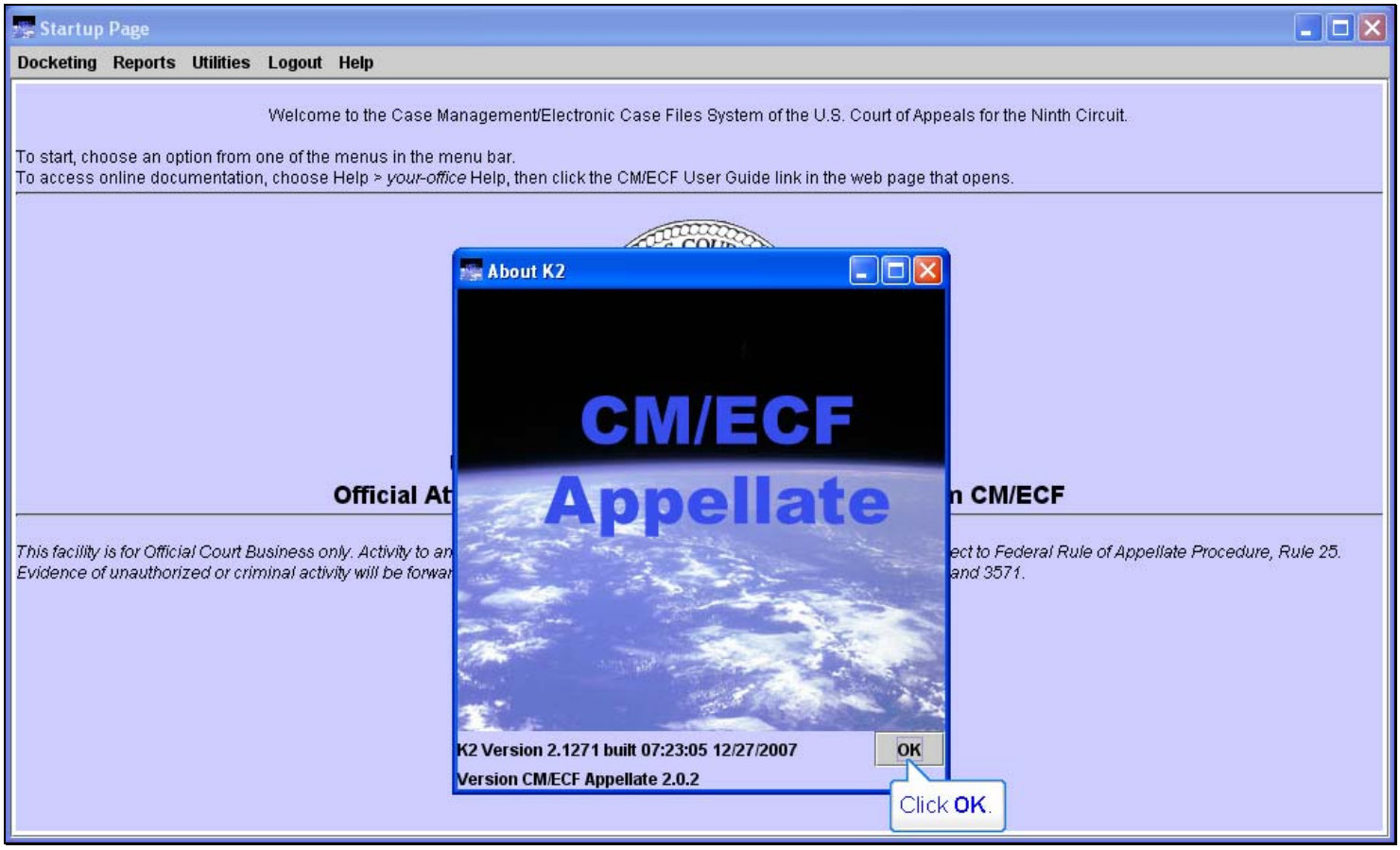
Slide 23 - Slide 23



Slide notes

(Note: This is a transitional slide.)

Slide 24 - Slide 24

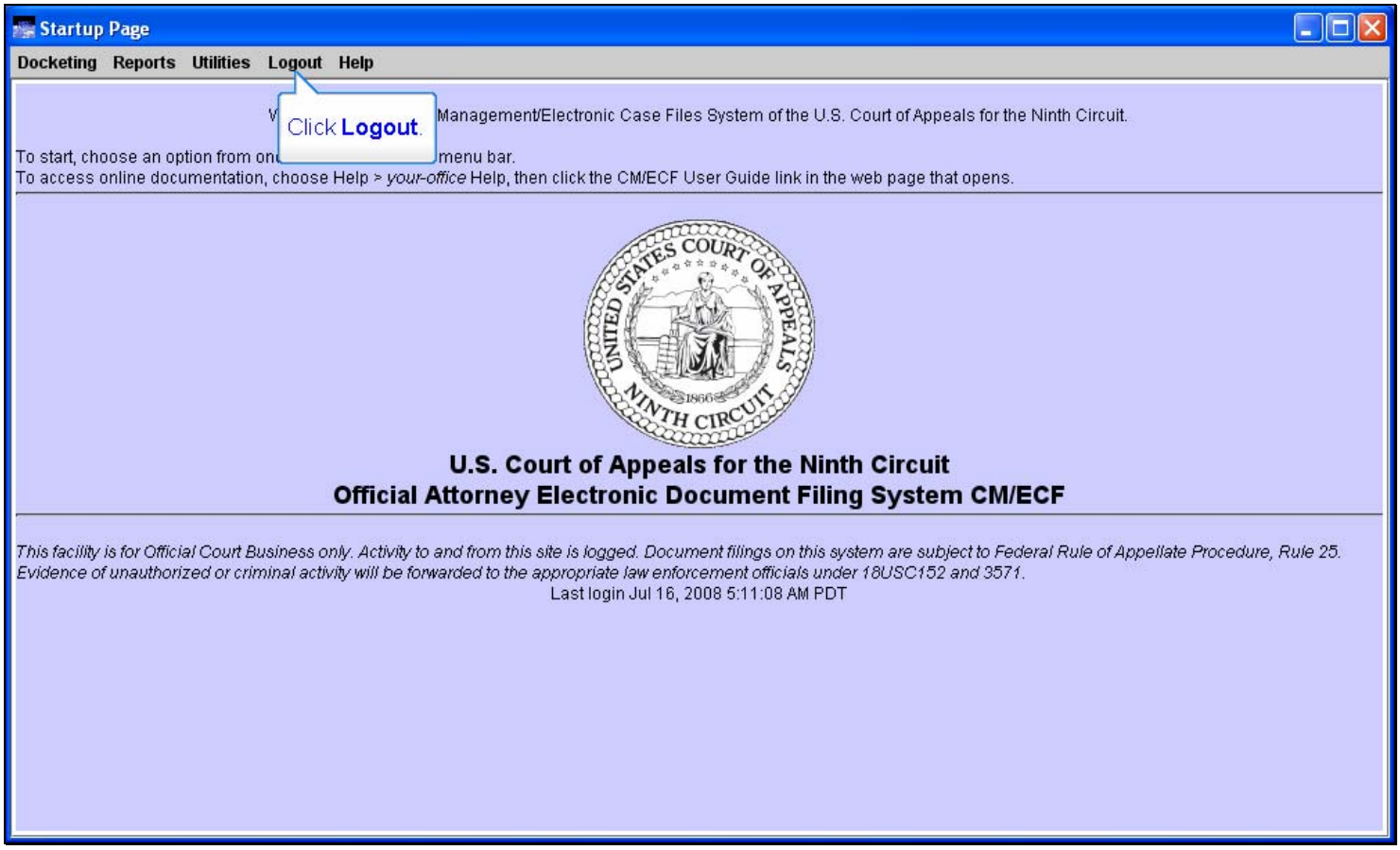


Slide notes

CM/ECF pops up a window which shows you the current version of the CM/ECF application.

Close the window by clicking OK.

Slide 25 - Slide 25

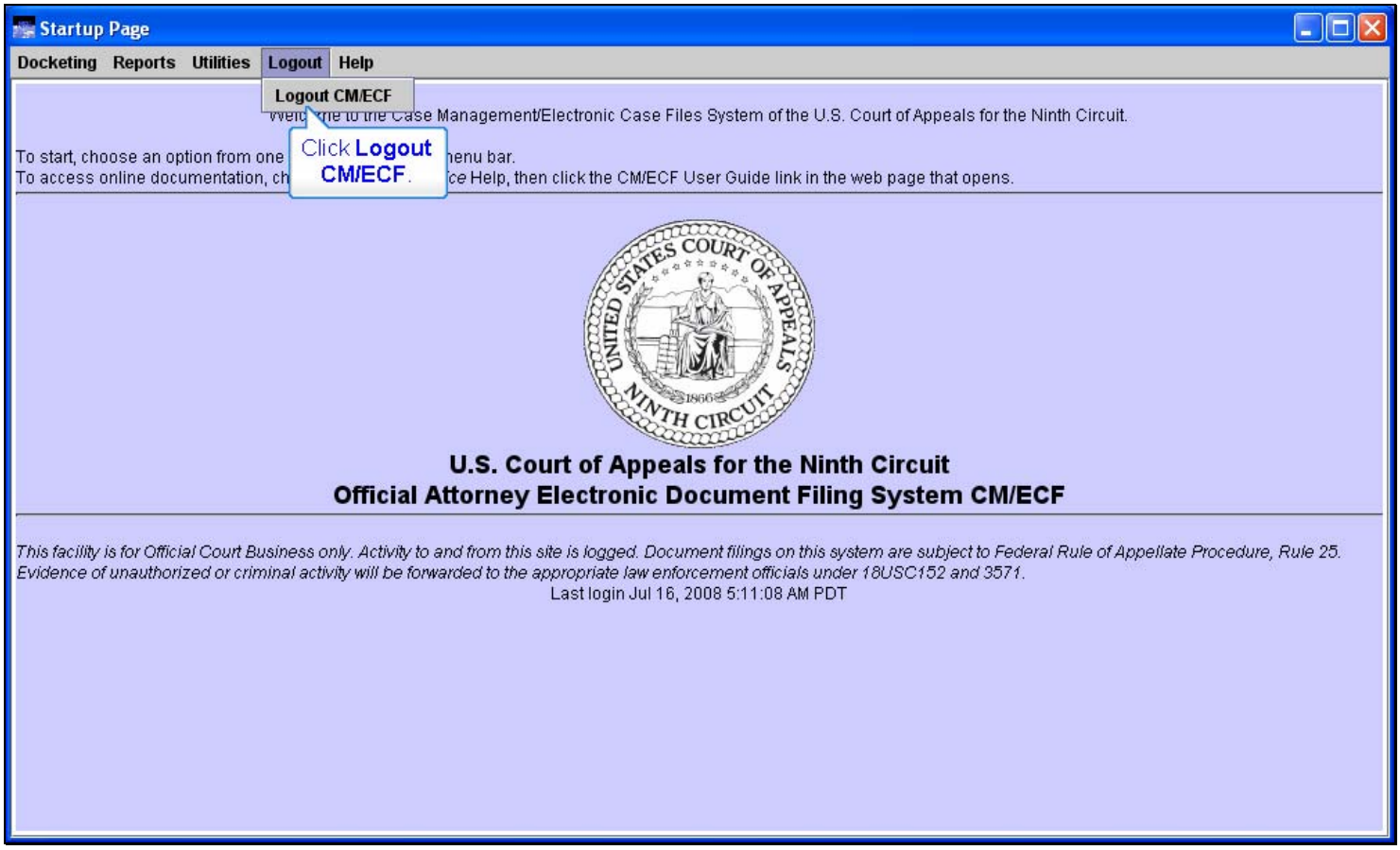


Slide notes

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.

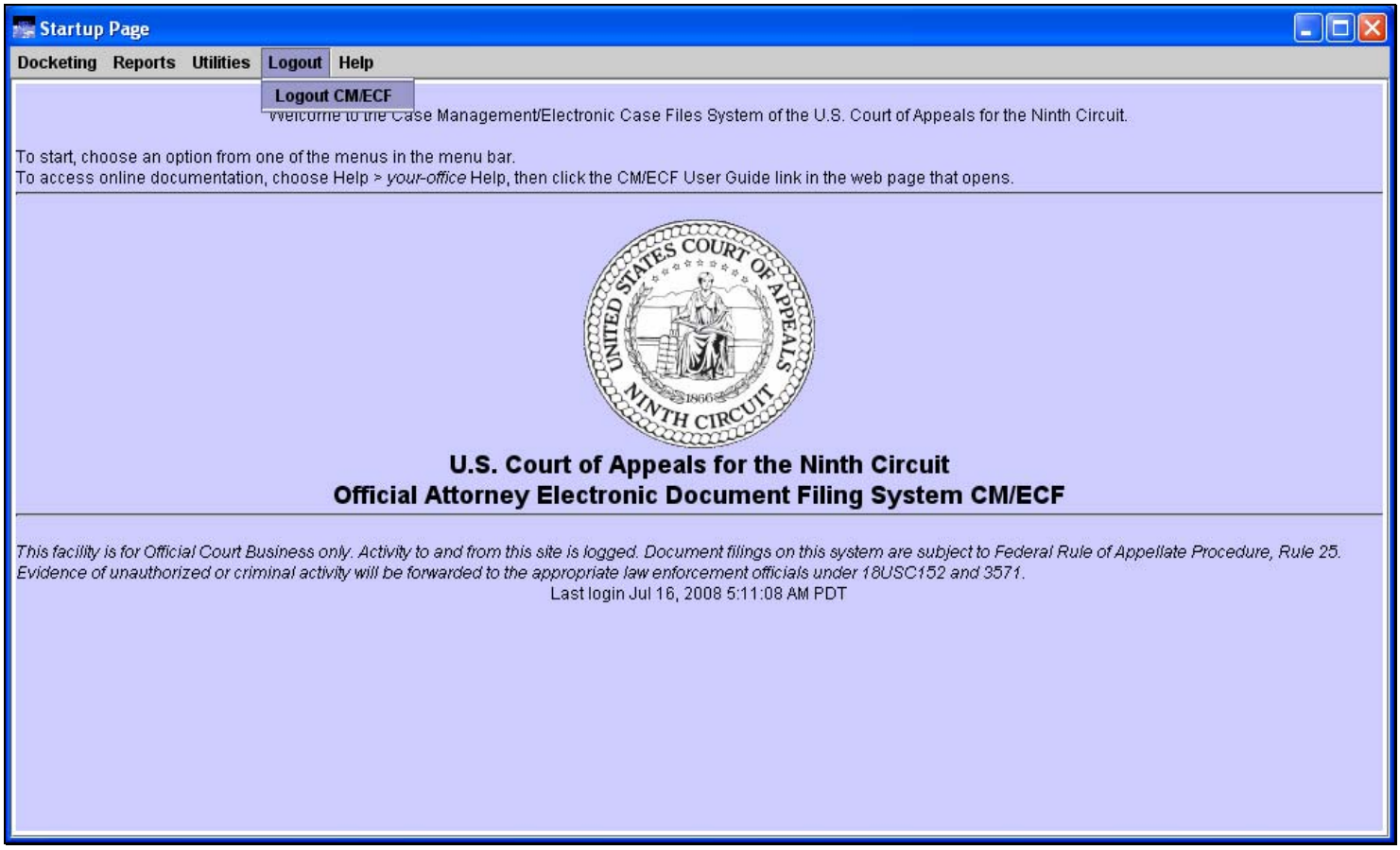
Slide 26 - Slide 26



Slide notes

Now click Logout CM/ECF.

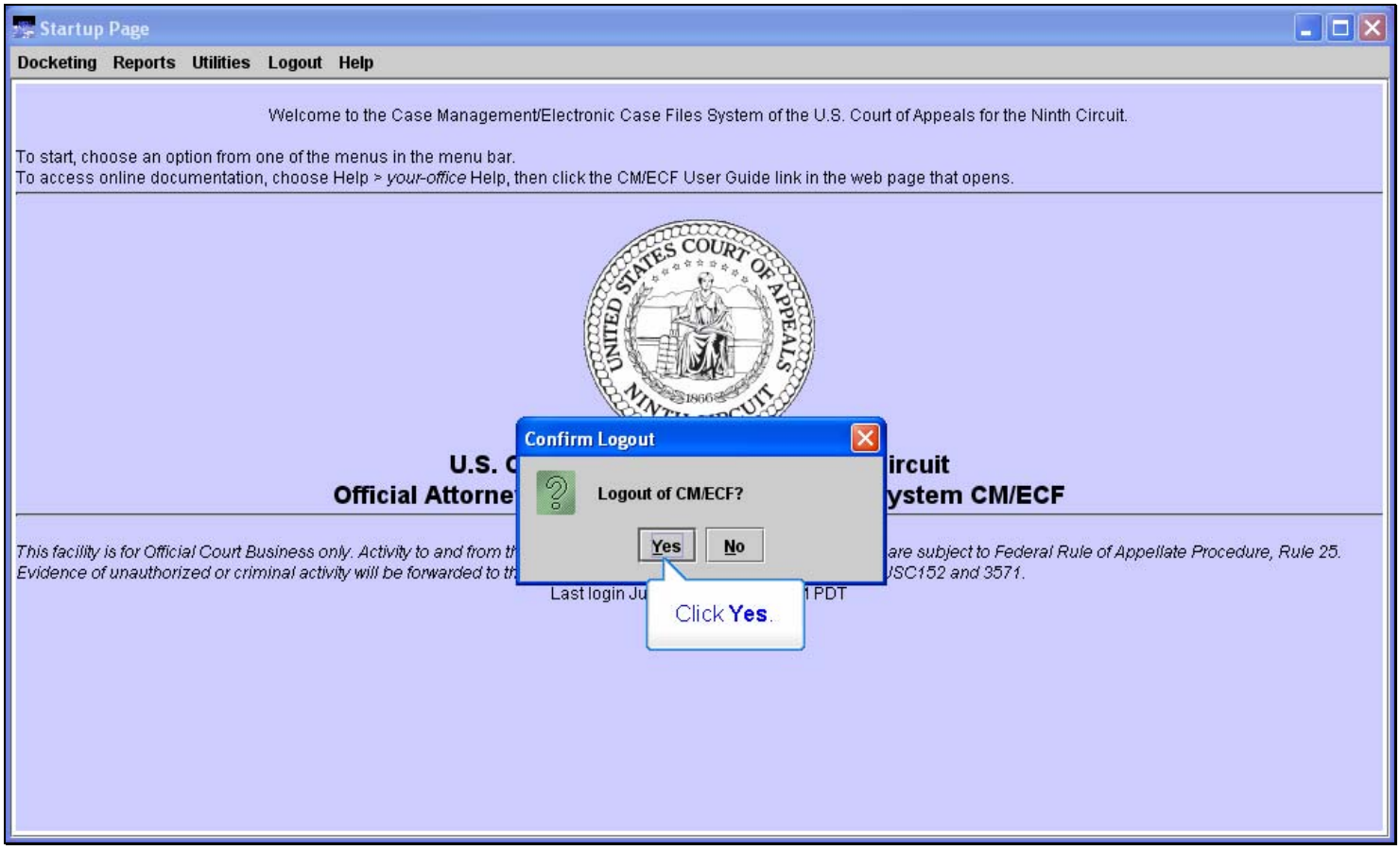
Slide 27 - Slide 27



Slide notes

(Note: This is a transitional slide.)

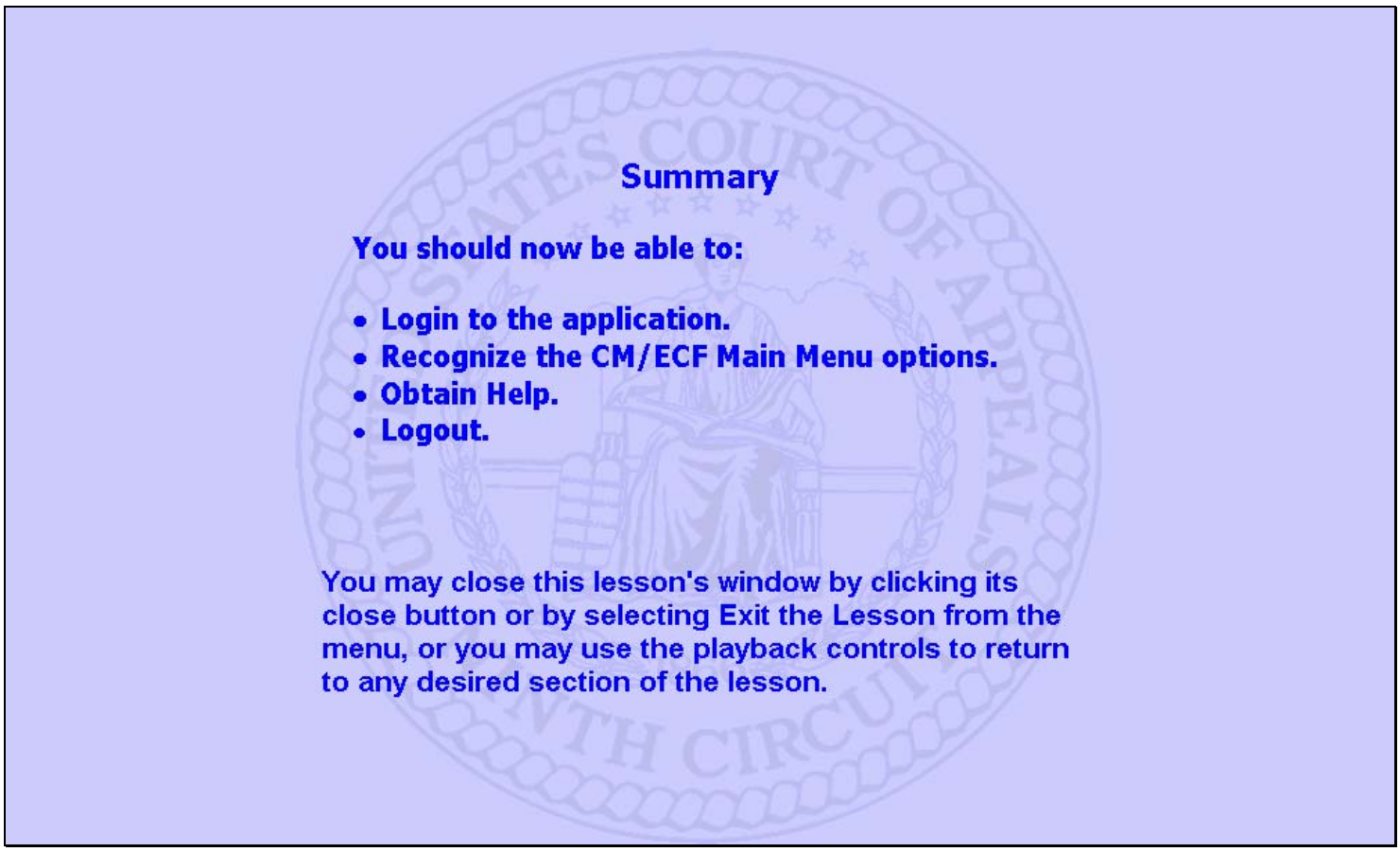
Slide 28 - Slide 28



Slide notes

Confirm you want to logout by clicking Yes.

Slide 29 - Summary



Slide notes

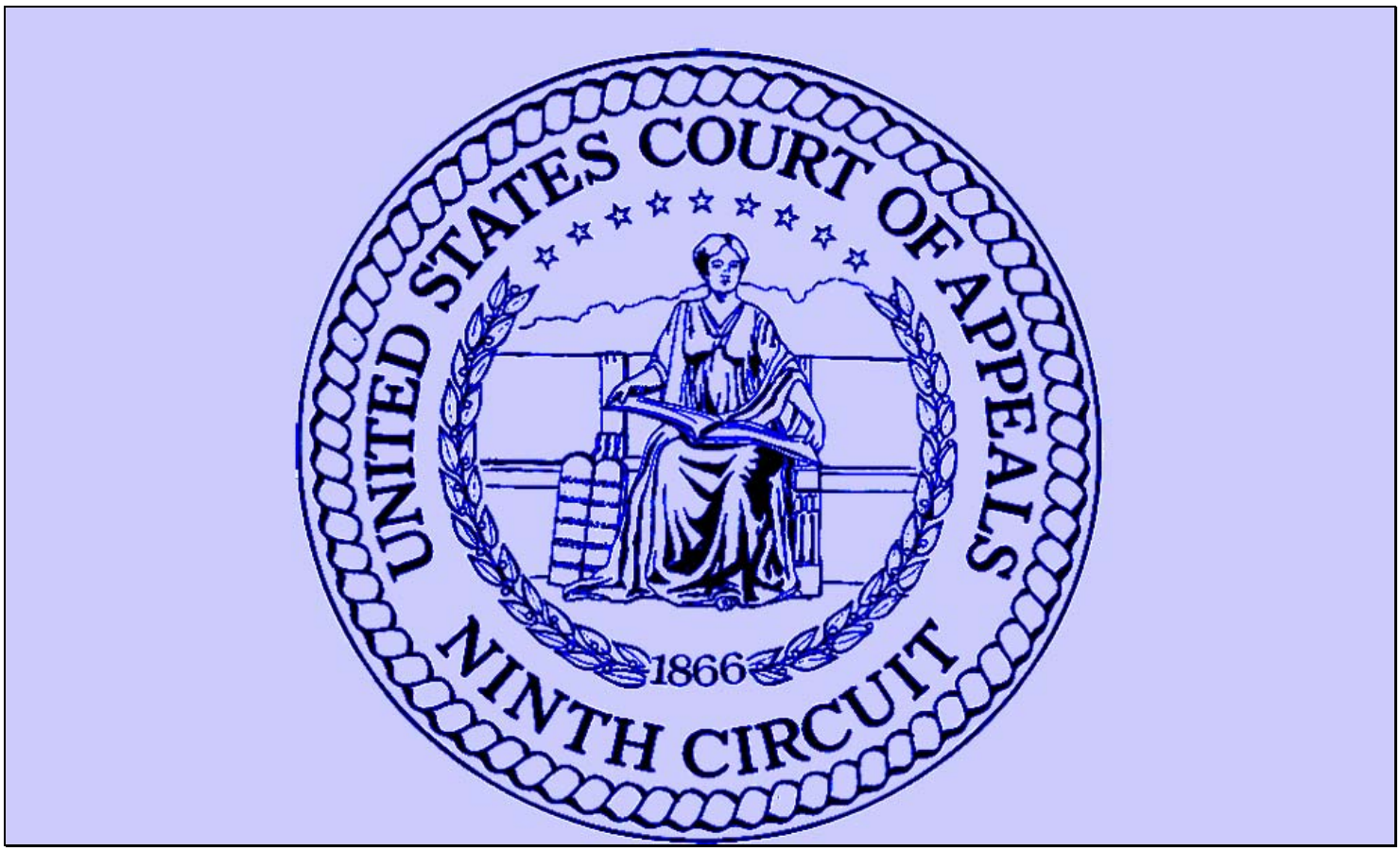
This concludes the Introduction to CM/ECF lesson module.

You should now be able to:

Login to the application, recognize the CM/ECF Main Menu options, obtain Help, and 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.

Slide 30 - exit



Slide notes

Thanks for taking the lesson. Goodbye.