

**Administrative Office of the U.S. Courts
Office of Case Management Systems**

CM/ECF

Release Notes

For PACER Users

NextGen CM/ECF Release 1.7.2

March 2023

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CONTENTS

1	Introduction	5
2	Restoration of the ROA/Create Appendix for Attorneys to 1.7 Status	6
3	PSF Public Terminals	7
4	PSF Attorney in Good Standing.....	12
5	Fillable Option to Reject/Require Flattening	14

Update Summary

Date	Section	Change
November 2022	All	Document created.
March 2023		Update browser versions used for testing release 1.7.2

1 Introduction

This release addresses several security, technical, and functional issues reported by various courts over the last several months, as well as introduces new functionality. This release includes the following bug fixes and new functionality that are specific to District CM/ECF public/attorney users:

1. Restoring the ROA/Create Appendix for Attorneys to Release 1.7 status.
2. Providing PACER users who have demonstrated need with permission from the court(s) access to some or all plea or sentencing related filings in each approved court via the Public Terminal, if implemented by the court.
3. Providing PACER Attorney users who are in good standing and have demonstrated need with permission from the court(s) access to some or all plea or sentencing related filings in each approved court, if implemented by the court.
4. External filers, depending upon court preference, will not be allowed to upload fillable forms into CM/ECF.

This release was tested with the following browsers:

Browser	Win 10	MacOS
Edge 108.0.1462.42 -110.0.1587.57	X	
Firefox 106.0.3 – 109.0.1	X	
Chrome 107.0.5304.88 – 110.0.5481.78	X	
Safari 13.2		X

Apple Device	iOS 16.3
iPad Air	X
iPhone 11	X

Android Device	Android 11.0 Pie
Samsung Galaxy Tab A	X

2 Restoration of the ROA/Create Appendix for Attorneys to 1.7 Status

The Electronic Public Access Public User Group previously requested a modification to CM/ECF to enable PACER users to view/print/download multiple documents from a case in a single request, rather than open documents and attachments individually. To provide this functionality, CM/ECF was modified to include a new "View all attachments" option on the selection pages for the Docket Sheet and Written Opinions report.

It was found that the use of the "View all attachments" option with "Create Appendix" resulted in incorrect application behavior when attempting to select multiple documents for viewing. This release restores the functionality of "Create Record on Appeal" and "Create Appendix" to the original functionality based on court configuration. View all attachments is only available with "View multiple documents."

Individual courts may offer the ability to select and view/download multiple documents with the "Create Appendix" functionality.

The software has been modified to prevent the error.

3 PSF Public Terminals

CM/ECF has been enhanced to provide public users who have requested and been granted access to view some or all PSF filings in the plea and sentence folder reports through the public terminal. **This functionality is optional and is implemented at the discretion of each court.**

Public users will need to follow the request process identified by the court to request access. Access may be granted to a specific case(s). Court designated documents, if present in the case, will be viewable at the public terminal using an assigned token and password.

The Docket Report will display the Plea Filings and Sentencing Filings beneath the case title.

U.S. District Court Administrative Office of the US Courts (pvld) (Utopia) CRIMINAL DOCKET FOR CASE #: 9:22-cr-00307-AZA-1	
Case title: USA v. Hodge Plea Filings	Date Filed: 03/07/2022 Sentencing Filings
Assigned to: Judge Albert Middle Alpha, Sr	
Defendant (1)	
Bartow Hodge 78 Hawthorne St Apt. 234 Edgewater, MD 20124 301-555-5555	represented by Patrick Allen Haun , IV Haun & Associates, LLP 4587 West McNew Avenue Suite 200 Washington, DC 20001 202-555-2555

Upon selecting Plea or Sentencing Filings, the response returned includes a message “**Access to restricted data in this folder requires an Access Code that can be obtained from Front-Desk Clerk. Enter Access Code.**”

Individual courts will define the process to request access to case materials. As the material contained within is considered sensitive, all access is logged. To request access, public terminal users will need to provide the following information:


- Individual identification
- Password (to be used with the “Temporary Access Code” provided by the court)
- Case number(s)

When prompted for a password, users should select a password they remember easily.

Note: The password will not be displayed on the printed confirmation message authorizing access.

Access requests will be granted for the same day the access request was received. The duration of access is set by the individual court for a period of one (1) to eight (8) hours. Users requiring more time to review the materials will be asked to request access to the case(s) again at the end of the authorized time.

After requesting access, court staff will print the “Confirmation Message” for easy use at the public terminal. The Confirmation Message includes the temporary access code, expiration date and time, and case list for which access has been granted.

 **Warning - The identification information provided to request access may be provided to law enforcement upon request.**

Temporary Access Code: KFDA-6MCM-7CXR-ER4P
 Access expires: Jul 22, 2022 3:18 PM

Case List	
1:22-cr-05250-BBB-NNN-1	Jason Harris
1:22-cr-05308-BBB-NNN-2	Meredith Johnson
1:22-cr-05308-BBB-NNN-3	Walter Z David

After receiving the Confirmation Message from the Front-Desk Clerk and returning to the public terminal, the user may enter any of the listed case numbers on the Confirmation Message. When accessing the Plea Folder or Sentencing Folder link, the user will select the link **Enter Access Code**.

Plea Filings

Notice: The contents, if any, are available remotely only to select parties defined by the court or judge.

Access to restricted data in this folder requires an Access Code that can be obtained from Front-Desk Clerk.

[Enter Access Code](#)

Selecting the **Enter Access Code** link will take the user to the **Privileged Access Request** screen below.

CM/ECF

Privileged Access Request

You are attempting to access sensitive information pertaining to a defendant. You will be prompted for the temporary access code and password regularly to validate the user who requested access is still using the public terminal.

Temporary Access Code

Password

[Return to Standard Access](#)

On the Privileged Access Request screen, the user will be prompted to enter their 16-character Temporary Access Code (from the Confirmation Message) and password (provided by the user to the Front-Desk Clerk). When both are populated, the user selects "Submit."

Note: The temporary access code field **is not case sensitive**. Users can enter the code in upper, lower, or mixed case. The password field **is case sensitive** and must match exactly as entered by court staff authorizing access.

The screenshot shows a web form titled "CM/ECF Privileged Access Request". Below the title is a paragraph: "You are attempting to access sensitive information pertaining to a defendant. You will be prompted for the temporary access code and password regularly to validate the user who requested access is still using the public terminal." The form has two input sections: "Temporary Access Code" with four individual boxes containing the text "dmma", "aw93", "jhge", and "t93z"; and "Password" with a single box containing ".....". Below these is a "Submit" button and a blue link "Return to Standard Access".

If the user incorrectly enters the **Temporary Access Code** or **Password** the user will be returned to the **Enter Access Code** screen with an error message "**Invalid temporary access code or password.**"

This screenshot is identical to the one above but shows an error state. The "Temporary Access Code" section now has four empty boxes. A yellow highlight covers the text "Invalid temporary access code or password." below the boxes. The "Password" box is also empty. The "Submit" button and "Return to Standard Access" link are still present.

Users entering a correct **Temporary Access Code** and **Password** will see the contents, if any, of the Plea Folder or Sentencing Folder as shown below. Actual filings available for public view will vary based on individual court criteria.

9:20-cr-00902-1 USA v. Wallace et al

Date filed: 02/27/2020

Date of last filing: 02/27/2020

Plea Filings

Date Filed	#	Docket Text
02/27/2020	P-642098	Minute Entry for proceedings held before Judge Xavier R Xi:PSF Plea and Sentence Hearing held on 2/27/2020. Carolyn Y Wallace (1) Plea of nolo contendere and sentencing on Count ComplaintCarolyn Y Wallace (1) Plea of guilty and sentencing on Count ComplaintCarolyn Y Wallace (1) Dismissed counts Count Complaint. (Court Reporter rabee.) (Attachments: # 1 Supplement) (Bailey, SysadminPVTD) [7:20-mj-07000-XXR] (Entered: 02/27/2020)
02/27/2020	P-642102	PSF REPORT AND RECOMMENDATIONS on Plea of Guilty as to Carolyn Y Wallace Objections to R&R due by 03/09/2020 (Bailey, SysadminPVTD) [7:20-mj-07000-XXR] (Entered: 02/27/2020)
02/27/2020	P-642105	PSF ORDER Rejecting Plea Agreement as to Carolyn Y Wallace (Bailey, SysadminPVTD) [7:20-mj-07000-XXR] (Entered: 02/27/2020)

Sample – Plea Filings report content

8:19-cr-05250-CBC-NNN All Defendants USA v. Garcia et al

Date filed: 02/19/2019

Date of last filing: 02/10/2020

Sentencing Filings

Date Filed	#	Docket Text
08/14/2019	S-638979	PSF PRESENTENCE INVESTIGATION REPORT (Sealed) as to Marcos Araujo Dias (Toups, SysadminPVTD) (Entered: 01/29/2020)
08/28/2019	S-638991	Minute Entry for proceedings held before Christine B Chi:PSF Sentencing held on 8/28/2019 for 1. (Court Reporter rah.) (Toups, SysadminPVTD) (Entered: 01/29/2020)
08/29/2019	S-638994	PSF SENTENCING MEMORANDUM by Marcos Araujo Dias (Toups, SysadminPVTD) (Entered: 01/29/2020)
08/30/2019	S-638997	PSF MOTION to Reduce Sentence by Marcos Araujo Dias Responses due by 9/16/2019 (Toups, SysadminPVTD) (Entered: 01/29/2020)

Sample – Sentencing Filings report content

If the case does not have publicly available content on either the Plea Filings or Sentencing Filings reports, users will see the court defined message, default message shown below.

1:20-cr-00100 All Defendants USA v. Bell et al

Date filed: 01/17/2020

Date of last filing: 01/17/2020

Sentencing Filings

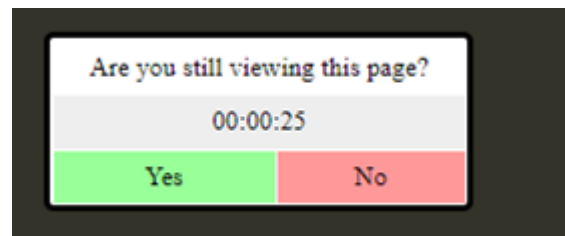
NOTICE: The contents, if any, are available remotely only to select parties defined by the court or judge.

Default application message.

IMPORTANT: Whenever the user accesses a Plea Filings or Sentencing Filings report, the user will be prompted to enter the **Temporary Access Code** and **Password**. This is for security reasons to ensure the authorized user is still the user of the public terminal.

If a public terminal remains on the Plea Filings or Sentencing Filings reports or a restricted document from one of these folders for 5 minutes, the user will receive periodic prompts "**Are you still viewing this page?**" The application cannot detect actions of the user within a page such as scrolling or page up/down clicks.

When the "**Are you still viewing this page?**" prompt displays, the underlying report or document is hidden from view. The user is given 30 seconds to respond.



Public Terminal 5-minute Access Verification

If a user clicks **Yes**, they will be returned to the report or document to continue reading. If a user clicks **No**, the user will be returned to the **Docket Sheet Selection** screen. If the user does not respond and the timer completes the countdown, the user will be returned to the **Docket Sheet Selection** screen.

If a public terminal user attempts to access a Plea Filings or Sentencing Filing report or restricted document after his/her access has expired, the user will not be able to see the content of the Plea Filings or Sentencing Filings reports or any document accessed from those reports. The user will see the standard default message "**Notice: The contents, if any, are available remotely only to select parties defined by the court or judge.**" or the court defined message.

If a public terminal user attempts to use a **Temporary Access Code** associated with a specific case(s) on case numbers not listed on the printed confirmation page, the user will see the standard default message "**Notice: The contents, if any, are available remotely only to select parties defined by the court or judge.**" or the court defined message.

This functionality is optional and is implemented at the discretion of each court.

4 PSF Attorney in Good Standing

CM/ECF has been enhanced to provide attorneys remote PACER access to some or all PSF filings in the plea and sentencing folder reports. This functionality is optional and is implemented at the discretion of each court.

When an attorney, who is admitted to this court or another court, attempts to access the Plea Filings or Sentencing Filings reports, the application will evaluate the data provided from PACER to determine if the attorney is "**in good standing**" in at least one (1) court and has no (0) "**not in good standing (at least partially due to disciplinary reason(s))**" notations. If the criteria is met, the attorney will be granted access to docket events and documents contained in the Plea Filings or Sentencing Filings reports that are not considered to be "**court-only**" or "**sealed**." Each court has the capacity of specifying the specific filings available to attorneys not participating in the case.

An attorney recognized to be "**in good standing**" will be able to access the Plea Filings and Sentencing Filings links on the Docket Report.

U.S. District Court
Administrative Office of the US Courts (pvtd) (Fredericksburg)
CRIMINAL DOCKET FOR CASE #: 7:20-cr-05310-EHE-SGS All Defendants
Internal Use Only

Case title: USA v. Luther et al
[Plea Filings](#)

Date Filed: 03/10/2020
[Sentencing Filings](#)

Upon selecting either the **Plea Filings** or **Sentencing Filings** links the attorney will have access to the material not considered to be "**court-only**" or "**sealed**," shown below.

9:20-cr-00902-1 USA v. Wallace et al Date filed: 02/27/2020 Date of last filing: 02/27/2020		
Plea Filings		
Date Filed	#	Docket Text
02/27/2020	P-642098	Minute Entry for proceedings held before Judge Xavier R Xi:PSF Plea and Sentence Hearing held on 2/27/2020. Carolyn Y Wallace (1) Plea of nolo contendere and sentencing on Count ComplaintCarolyn Y Wallace (1)Plea of guilty and sentencing on Count ComplaintCarolyn Y Wallace (1) Dismissed counts Count Complaint. (Court Reporter rabee.) (Attachments: # 1 Supplement) (Bailey, SysadminPVTD) [7:20-mj-07000-XXR] (Entered: 02/27/2020)
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Sample – Sentencing Filings report content

The software has been modified to recognize the exemptions specified by specific courts as identified by the PACER Service Center when the user accesses each court.

5 Fillable Option to Reject/Require Flattening

CM/ECF has been enhanced in order to enable courts to prevent filers from uploading fillable PDFs. This functionality is optional and is implemented at the discretion of each court. Courts implementing the feature will have a customizable error message displayed upon attempted upload of a fillable PDF. A default message is shown below.

Other Documents

[0:40-cv-00212-BBB-FJF Shrum v. Shade](#)

The court requests that fillable forms be flattened prior to filing in CM/ECF.

Error File: C:\fakepath\1 - KEEP - Transcript Order Form.pdf

Submitted Entries

File Type	Filename	Category	Description
Main Document	C:\fakepath\1 - KEEP - Transcript Order Form.pdf	-	-

[Back](#)