



CM/ECF User Manual

MIDDLE DISTRICT OF NORTH CAROLINA
REVISED AUGUST 3, 2020

DISTRICT COURT | 324 W. Market Street, Greensboro NC

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SECTION 1 - GETTING STARTED

Introduction

The United States District Court for the Middle District of North Carolina requires attorneys to file documents with the Court from the Internet. Local Civil Rule 5.3 authorizes electronic filing in conjunction with the Federal Rules of Civil and Criminal Procedure. The CM/ECF User's Manual, along with the Electronic Case Filing Administrative Policies and Procedures Manual, provide instructions on how to file documents, view documents, and retrieve docket sheets for cases filed in this Court.

A party who is not represented by counsel must file their documents with the Clerk's Office conventionally, unless otherwise ordered by this court.

The Filing User should have a working knowledge of Internet browsers and Adobe Acrobat software.

CM/ECF System Capabilities

The CM/ECF system allows the Filing User with Internet accounts and browser software to perform the following functions:

- Electronically file documents in actual ("live") cases
- View official docket sheets and documents associated with cases
- View various reports

Help Desk

The initial point of contact for any Filing User having trouble filing a document electronically should be the CM/ECF Help Desk. Contact the Court's Help Desk between the hours of 8:00 a.m. and 5:00 p.m., Monday through Friday, if you need assistance using the CM/ECF system.

Help Desk	Phone Numbers
Toll Free	1-800-659-2212
Clerk's Office	336-332-6030

A technical failure on a given day is determined if the system is unable to accept filings continuously or intermittently over the course of any period of time greater than one hour after 10:00 a.m. Eastern Time that day. Known system outages will be posted on the Court's web page, if possible.

See Electronic Case Filing Administrative Policies and Procedures Manual, Section P, for further details.

CM/ECF System Features


After logging into the CM/ECF system, you will be taken to a main page that has seven (7) different categories listed across the top of the screen; Civil, Criminal, Query, Reports, Utilities, Search, and Logout.



Note: *If you do not see the Civil or Criminal tabs, you are logged into PACER.*

Note: *A Filing User cannot view sealed documents using PACER.*

1	<u>Civil</u>	The Civil tab allows the Filing User the ability to open new civil cases and file documents in civil cases.
2	<u>Criminal</u>	The Criminal tab allows the Filing User the ability to file documents in criminal cases.
3	<u>Query</u>	The Query tab will take the Filing User directly to a PACER login screen. Enter in your PACER login and password to look up cases that are filed in the Middle District of North Carolina.

4	<u>Reports</u>	<p>The Reports tab allows the Filing User to run the Calendar Events Report to search hearing dates using multiple parameters.</p> <p><i><u>Note:</u> Other reports are available through PACER.</i></p>
5	<u>Utilities</u>	<p>The Utilities tab allows the Filing User to do the following:</p> <ul style="list-style-type: none"> • <u>Maintain Your Account</u> <ul style="list-style-type: none"> ○ Modify the primary email address. ○ Add/Remove a secondary email address. ○ Change the password to your user account. • <u>Legal Research</u> <ul style="list-style-type: none"> ○ Contains hyperlinks to a Law Dictionary, Lexis via the Internet, a Medical Dictionary, and Westlaw via the Internet. • <u>View Your Transaction Log</u> <ul style="list-style-type: none"> ○ Generate a report to verify CM/ECF Filing User’s transactions. • <u>Mailings</u> <ul style="list-style-type: none"> ○ Enter a case number to view who will receive electronic notices in a case and who will need to be manually noticed. • <u>Review Billing History</u> <ul style="list-style-type: none"> ○ Run a report showing Filing User’s history for a specified date range. • <u>Verify a Document</u> <ul style="list-style-type: none"> ○ Allows the Filing User to enter data in the screen fields to locate a particular document attached to a specific case number.
6	<u>Search</u>	<p>The Search tab allows the Filing User to look up an event in this Court’s CM/ECF dictionary.</p>
7	<u>Logout</u>	<p>The Logout tab allows the Filing User to exit the CM/ECF system.</p> <p><i><u>Note:</u> To ensure proper logout, the Filing User should select Logout before closing the browser.</i></p>
8		<p>The yellow question mark at the end of the blue menu bar will bring up a pop-up window displaying helpful information about the Filing User’s current screen.</p>

SECTION 2 - HARDWARE AND SOFTWARE

Requirements

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

- Windows or Macintosh;
- Internet access;
- JavaScript enabled web browser;
- Software, such as Adobe Acrobat PDF Writer or a word processing program capable of converting documents from a word format to a PDF document. For viewing documents, only Adobe Acrobat Reader is needed; and
- A scanner to convert documents to PDF.

SECTION 3 - OBTAINING A CM/ECF ACCOUNT AND MECHANICS

PACER Registration

A CM/ECF User is required to have a PACER account. The PACER account gives you the ability to read case dockets and view electronic images of documents.

If you do not have a PACER login, contact the PACER Service Center to establish an account via telephone at (800) 676-6856 or (210) 301-6440 or register online at <http://pacer.psc.uscourts.gov>.

Note: A Filing User cannot view sealed documents using PACER.

CM/ECF Registration

A participant is required to register with this Court to receive a login and password for the CM/ECF System.

REGISTRATION PROCESS	
ATTORNEY ADMITTED TO PRACTICE IN THE MIDDLE DISTRICT OF NORTH CAROLINA	ATTORNEY NOT ADMITTED TO PRACTICE IN THE MIDDLE DISTRICT OF NORTH CAROLINA
Attend a federal court's training on electronic filing or be an electronic filer in another court. <i>Click this link for Training Information</i>	Attend a federal court's training on electronic filing or be an electronic filer in another court.
	Associate with local counsel permitted to file in the Middle District of North Carolina <i>See Local Rule 83.1 and 5.3(c)(1)</i>
Submit Electronic Filing Attorney Registration Form <i>Electronic Filing Attorney Registration Form</i>	Submit Electronic Filing Attorney Registration Form <i>Electronic Filing Attorney Registration Form</i>
An email will be sent to the Filing User's primary email address containing a login and password.	An email will be sent to the Filing User's primary email address containing a login and password.
File a Notice of Appearance. Only the filing attorney of a pleading can be associated with a document. Co-counsel not filing the documents would need to file a notice of appearance to get on the docket sheet. Exceptions to the notice of appearance are mentioned in other sections of the manual.	File a Notice of Special Appearance containing both local and out of state attorneys' signatures. See Local Civil Rule 83.1(d).

***Note:** Pro se parties, in accordance with [Local Rules 5.3\(c\)\(2\) and 11.1\(c\)](#), must file a motion seeking permission from the Court to register as a CM/ECF user.*

Your Account

This Court allows the Filing User to change certain information in their user account. See the table below for information that can and cannot be changed by the Filing User.

Filing User can ...	Court Can Only ...
Change password	Change/Modify Name
Modify primary email address	Change/Modify Mailing Address
Add/Modify/Remove secondary email address	
Change/Modify Phone/Fax Number	

Note: For Court Can Only options, the Filing User shall submit requested changes on office letterhead.

Changing Password

- Step 1:** Click **Utilities** on the blue menu bar in CM/ECF.
- Step 2:** Click **Maintain Your Account**.
- Step 3:** Click the **More User Information** button on the Maintain User Account Screen.
- Step 4:** Delete the asterisks in the password field and enter the new password.

Note: Your password must meet the following criteria.

- *Minimum of 8 characters.*
- *Upper and lower-case letters.*
- *Include a digit or special character.*

- Step 5:** Click the **Return to Account Screen** button.
- Step 6:** Click **Submit** on the Maintain User Account Screen.
- Step 7:** Click **Submit** again.

Modifying a Primary Email Address

- Step 1:** Click **Utilities** on the blue menu bar in CM/ECF.
- Step 2:** Click **Maintain Your Account**.
- Step 3:** Click the **Email Information** button on the Maintain User Account Screen.
- Step 4:** Click the e-mail address link under the Primary e-mail address heading.
- Step 5:** Modify the email address.
- Step 6:** Click the **Return to Person Information Screen** button.
- Step 7:** Click **Submit** on the Maintain User Account Screen.
- Step 8:** Click **Submit** again.

Adding a Secondary Email Address

- Step 1:** Click **Utilities** on the blue menu bar in CM/ECF.
- Step 2:** Click **Maintain Your Account**.
- Step 3:** Click the **Email information** button on the Maintain User Account Screen.
- Step 4:** Click **add new e-mail address** link under the Secondary e-mail addresses heading.
- Step 5:** Enter the secondary email address you wish to add to your account.
- *** Repeat steps 4 and 5 until all secondary email addresses are entered. *****
- Step 6:** Click the **Return to Person Information Screen** button.
- Step 7:** Click **Submit** on the Maintain User Account Screen.
- Step 8:** Click **Submit** again.

Modifying a Secondary Email Address

- Step 1:** Click **Utilities** on the blue menu bar in CM/ECF.
- Step 2:** Click **Maintain Your Account**.
- Step 3:** Click the **Email Information** button on the Maintain User Account Screen.
- Step 4:** Click the e-mail address link under the Secondary e-mail address heading.
- Step 5:** Modify the email address.
- Step 6:** Click the **Return to Person Information Screen** button.
- Step 7:** Click **Submit** on the Maintain User Account Screen.
- Step 8:** Click **Submit** again.

Removing a Secondary Email Address

- Step 1:** Click **Utilities** on the blue menu bar in CM/ECF.
- Step 2:** Click **Maintain Your Account**.
- Step 3:** Click the **Email Information** button on the Maintain User Account Screen.
- Step 4:** Click the e-mail address link under the Secondary e-mail address heading.
- Step 5:** Delete the e-mail or click the “x” in the field to delete the email address.
- Step 6:** Click the **Return to Person Information Screen** button.
- Step 7:** Click **Submit** on the Maintain User Account Screen.
- Step 8:** Click **Submit** again.

Change/Modify Phone/Fax Number

- Step 1:** Click **Utilities** on the blue menu bar in CM/ECF.
- Step 2:** Click **Maintain Your Account**.
- Step 3:** Modify your phone and/or fax number in the applicable field.
- Step 4:** Click **Submit** on the Maintain User Account Screen.
- Step 5:** Click **Submit** again.

Viewing Your Transaction Log

Use this feature of CM/ECF to review your transactions and to verify that:

- All the transactions you entered are reflected in the Transaction Log
- No unauthorized individuals have entered transactions into the CM/ECF system using your login name and password.

Step 1: Click **Utilities** on the blue menu bar in CM/ECF.

Step 2: Click **View Your Transaction Log**.

Step 3: Enter the date selection criteria for the transaction log report.

***Note:** By selecting the check box, you can make these options your default.*

Step 4: The report will display with any transaction made using your account number for the dates specified. The bottom of the report will show the total number of transactions.

The screenshot shows the CM/ECF Transaction Log report. At the top, there is a navigation bar with 'ECF' logo and menu items: 'Civil', 'Criminal', 'Query', 'Reports', 'Utilities', 'Search', and 'Logout'. Below the navigation bar, the title 'Transaction Log' is centered, followed by the report period 'Report Period: 01/01/2004 - 05/18/2017'. The main content is a table with columns: 'Id', 'Date', 'Case Number', and 'Text'. The table contains five rows of transaction data. At the bottom of the table, it states 'Total Number of Transactions: 5'.

Id	Date	Case Number	Text
2029754	12/01/2016 12:03:30	1-16-at-2001	MOTION to Adopt [4] Notice of Appearance <i></i> by [redacted] . Response to Motion due by 12/22/2016 (Attorney Test 6,)
2029757	12/01/2016 12:05:02	1-16-at-2000	MOTION to Affirm the Decision of the Commissioner <i></i> by [redacted] . Response to Motion due by 12/27/2016 (Attorney Test 6,)
2128878	05/18/2017 11:57:20	1-16-at-2001	RESPONSE <i></i> filed by Plaintiff [redacted] re [7] MOTION to Compel <i></i> filed by [redacted] filed by [redacted] . Replies due by 5/25/2017 (Attorney Test 6,)
2128997	05/18/2017 14:36:01	1-16-at-2001	RESPONSE TO MOTION TO COMPEL <i></i> filed by Plaintiff [redacted] re [9] MOTION to Compel <i></i> filed by [redacted] filed by [redacted] . Replies due by 5/25/2017 (Attorney Test 6,)
2129000	05/18/2017 14:37:13	1-16-at-2001	RESPONSE <i></i> filed by Plaintiff [redacted] re [10] MOTION for Protective Order <i></i> filed by [redacted] filed by [redacted] . Replies due by 5/25/2017 (Attorney Test 6,)

Total Number of Transactions: 5

If you believe or suspect someone is using your login and password without your permission, immediately change your password and contact the Court's Help Desk at 1-800-659-2212 or the Clerk's Office at 336-332-6000.

Retrieve Your Login and Password

If the Filing User forgets his/her login and/or password it can be retrieved from the Court's website. Use the primary email address that was used to create the Filing User's account. If the Filing User has switched firms and the old email address is still linked to the account, call the Clerk's Office at 336-332-6003.

Step 1: Go to the Court's website (www.ncmd.uscourts.gov) and click on CM/ECF from the blue menu bar. Then click the Retrieve Login/Password link.



Step 2: Enter the primary email address used when the account was created and click [Submit Request].

A screenshot of the 'Retrieve Login/Password' form. The form contains a text box for the 'Account Email Address' which has been filled with 'jordan@jpc.com'. Below the text box is a 'Submit Request' button.

Note: *If you receive an error message stating that an account matching the information you provided could not be located, check for any typos and/or case sensitivity in the email address entered. If the email address is correct and you still receive the message, contact the Clerk's Office at 336-332-6003.*

The Filing User will receive the login and password via the primary email address associated with the account.

SECTION 4 - PORTABLE DOCUMENT FORMAT (PDF)

Setting Up the Acrobat PDF Reader

A Filing User must set up Adobe's Acrobat® Reader software to view documents that have been electronically filed in the CM/ECF system. When installing this product, please review and follow Adobe's directions to utilize Acrobat® Reader after installation. Only PDF (Portable Document Format) documents may be filed with the Court using the CM/ECF system. Before filing documents with the court, the Filing User should preview the PDF formatted document to ensure that it appears in its entirety and in the proper format.

How to View a PDF File

Start the Adobe Acrobat program and select the File menu. Choose Open and locate the PDF document from the designated location in your file directory. Once the file has been located, click to view.

How to Convert Documents to PDF Format Using Any Word Processing Program

- Step 1:** Create document.
- Step 2:** Click File and then select Print.
- Step 3:** Select Adobe PDF from the printer options.
- Step 4:** Click Print.
- Step 5:** Click the drop-down menu from the Save in box. Select the directory then folder where you want to save the file.
- Step 6:** Type the name of the file in the file name field and click Save.

SECTION 5 - ACCESSING AND LOGGING INTO THE CM/ECF SYSTEM

Accessing the CM/ECF System

A Filing User can access the CM/ECF System via the Internet at <http://ecf.ncmd.uscourts.gov>

Click on **North Carolina Middle District - Document Filing System** hyperlink to open the login screen.

***** Or *****

A Filing User can go to the Middle District of North Carolina District Court's website at www.ncmd.uscourts.gov and click on the **E-Filing (CM/ECF)** hyperlink.

Logging into the CM/ECF System

- Enter the CM/ECF System login and password authentication that was provided by the court.

CM/ECF Filer or PACER 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.

Instructions for filing:
Enter your CM/ECF login and password if you are electronically filing something with the court.

If you received this login page as a result of a link from a Notice of Electronic Filing email:
Enter your CM/ECF login and password. The system prompts customers for a CM/ECF login and password when attempting to view certain types of documents.

If you have trouble viewing a document:
After successful entry of your CM/ECF login, you should be able to view the document. If you receive the message "You do not have permission to view this document," viewing the document is restricted to attorneys of record in the case and the system does not recognize you as such. If the login prompt appears again, after you have entered your CM/ECF login and password, it means that the "Time lock" link has expired. You will need to enter your PACER login and password to view the document.

Instructions for viewing filed documents and case information:
If you do not need filing capabilities, enter your PACER login and password. If you do not have a PACER login, you may register online at <http://www.pacer.uscourts.gov>.



IMPORTANT NOTICE OF REDACTION RESPONSIBILITY: All filers must redact Social Security or taxpayer identification numbers, dates of birth, names of minor children, financial account numbers, and, in criminal cases, inmate addresses, in compliance with [Fed. R. Civ. P. 5.2](#) or [Fed. R. Crim. P. 6\(e\)](#). This requirement applies to all documents, including attachments.

I understand that, if I file, I must comply with the redaction rules. I have read this notice.

Notes:
An access fee of \$0.10 per page or \$2.40 per document with an audio attachment, as approved by the Judicial Conference of the United States, will be assessed the access to this service. For more information about CM/ECF, [click here](#) or contact the PACER Service Center at (800) 676-8038.
CM/ECF has been tested with Firefox and Internet Explorer 8 and 9.

	<u>Description</u>
1	Type in the login (lowercase).
2	Type in the password. <i>(CaSe Sensitive!)</i>
3	A code created by the user that is entered on the PACER/ECF login screen along with a PACER account. The code allows the user to track filings and PACER usage by client. The quarterly billing statements from PACER will show the total amount due according to each client code. Contact PACER for more information. You can leave this field blank.
4	Check the box indicating that the Filing User understands that they must comply with redaction rules.
5	Click Login. <i><u>Note:</u> The Reset button will clear all fields and uncheck the redaction responsibility check box.</i>

Note: *If you enter an incorrect login and/or password, the following language appears “Invalid username or password.” Select the back button to reenter the Filing User’s login and password.*

Note: *The date the filing user last logged into the CM/ECF System appears at the bottom left corner of this screen. The filing user should review this information each time you log in for security reasons. If you believe or suspect someone is using your login and password without your permission, immediately change your password and contact the Court’s Help Desk at 1-800-659-2212 or the Clerk’s Office at 336-332-6000.*

- Once the main menu appears, choose from a list of hyperlinked options on the top of the menu bar.

Note: *There is a different login and password for CM/ECF and PACER.*

☆ **If the Filing User sees the screen shot below, the user is logged into CM/ECF.**



☆ **If the Filing User sees the screen shot below, the user is logged into PACER.**



SECTION 6 - CIVIL CASE OPENING

Opening a Civil Case in CMECF

Except for cases requesting to be placed under seal, cases shall be filed electronically using the ECF (Electronic Case Filing) system. After successfully logging into the system, follow these procedures to open a civil case. Once the case has been created, the Filing User shall file the initial documents.

New cases are deemed filed the day the Clerk's Office receives the complaint accompanied by either a completed *In Forma Pauperis* Application or the required filing fee.

To open a civil case:

- Step 1:** Select the Type of Filing: From CM/ECF, select **Civil** from the blue menu bar.
- Step 2:** Select the Type of Document: Select **Civil Case** under the Open a Case category.
- Step 3:** Data Field Screen Displays: See table on the next page for options and click [Next].

The screenshot shows a web form titled "Open Civil Case". At the top, there are two dropdown menus: "Office" with "NCMD" selected and "Case type" with "cv" selected. Below these is the text "Date filed: 10/26/2017". The form contains several input fields: "Lead case number" (text box), "Association type" (dropdown menu with "Appeal" selected), "Other court name" (text box), "Other court number" (text box), and "JPML number" (text box). At the bottom of the form, there is a checkbox labeled "Related cases" which is currently unchecked. Below the checkbox are two buttons: "Next" and "Clear".

Office	Leave as NCMD.
Case type	Leave the case type as “cv” for civil case.
Date Filed	Hardcoded, file date is automatically entered by the system.
Lead Case Number	Leave blank. If applicable, the lead case number will be entered by the Clerk’s Office.
Association Type	Do not enter the association type. This is a default setting and should always reflect “appeal.”
Other court name	Enter the court’s name <u>only</u> if the case is a Petition for Removal from another court.
Other court number	Enter the other court number <u>only</u> if the case is a Petition for Removal.
JPML number	Enter the JPML number if there is an existing case in the Multi District Litigation court. Otherwise, leave blank.
Related cases	Check the box to indicate whether there is a related case filed in the Middle District of North Carolina.

Step 4: Data Field Screen Displays: See table below, make the applicable selections on this statistical screen and click [Next].

The screenshot shows the 'Open Civil Case' form with the following fields and values:

- Jurisdiction:** 3 (Federal Question)
- Cause of action:** (empty dropdown)
- Nature of suit:** 0 (zero)
- Origin:** 1 (Original Proceeding)
- Citizenship plaintiff:** (empty dropdown)
- Citizenship defendant:** (empty dropdown)
- Jury demand:** n (None)
- Class action:** n (No Class Action Alleged)
- Demand (\$000):** (empty text box)
- Arbitration code:** (empty dropdown)
- County:** Alamance
- Fee status:** due (due)
- Fee date:** 10/26/2017
- Date transfer:** (empty text box)

Jurisdiction	Select the appropriate jurisdiction from the drop-down list. <i>(Why is this case filed here?)</i>
Cause of Action	Select the appropriate cause of action from the drop-down list. <i>(What is this case about?)</i> If the cause of action you are looking for is not included in the list, contact the clerk’s office.
Nature of Suit	Select the appropriate nature of suit from the drop-down list. <i>(What kind of case is it?)</i>
Origin	Select the appropriate origin from the drop-down list. <i>(How did it get here?)</i>
Citizenship Plaintiff	Enter citizenship information of the plaintiff, only if the jurisdiction is Diversity .
Citizenship defendant	Enter citizenship information of the defendant, only if the jurisdiction is Diversity .
Jury Demand	If a jury demand is being requested, make the applicable party selection from the drop-down list. Otherwise, leave blank.
Class Action	If seeking a class action, a separate motion must be filed pursuant to Local Rule 23.1. Leave at “n.”
Demand	Leave this field blank.

Arbitration code	Leave this field blank.
County	Select the county of residence of the first-listed plaintiff in the Middle District of North Carolina. If the U.S. is the plaintiff in the case, enter the county of residence of the first-listed defendant.
Fee Status	<ul style="list-style-type: none"> ➤ fp (in forma pauperis) – to be used for any pro se, prisoner or Social Security ifp case. ➤ none (no fee required) – to be used for cases in which the United States is the plaintiff and for §2255 motions. ➤ pd (paid) – to be used when the filing fee has been paid in full. ➤ ww (waived) –
Fee date	This date entered by the system, this is the same as the filing date.
Date Transfer	Leave this field blank.

***Note:** The system will verify the accuracy of combinations entered on the screen above. For example, if an invalid Nature of Suit and Jurisdiction combination is selected, the following screen will appear.*



Step 5: The Search for Party Screen Displays: Enter in **ALL CAPS** the party’s First and Last name and click “Search”. If the party is a business, enter full name, in **ALL CAPS**, with correct punctuation in “Last/Business Name” field and click [Search].

The CM/ECF system stores names from other cases. The court wants you to search for the name of the party in our CM/ECF system while opening a case. The party you are searching for, if a popular name, may already be in CM/ECF system. Therefore, creating a new party is not required. See the table below for instructions.

If party search results...	Then...
<p>Finds an exact match</p>	<ul style="list-style-type: none"> ➤ Highlight the name. ➤ Click [Select Party]. ➤ Proceed to next step.
<p>No matches or not exact match</p>	<ul style="list-style-type: none"> ➤ Click [Create New Party]. ➤ Proceed to next step.

Step 6: The Party Information Screen Displays: See table below, the “Role” field is the most important field to populate. Select either Plaintiff or Defendant from the “Role” drop-down list. Click [Add Party] when finished.

The screenshot shows a web form titled "Party Information" with a sub-section "FIELDS". The form contains the following fields and controls:

- Title: Text input field.
- Role: A green dropdown menu currently showing "Plaintiff (party)".
- Pro Se: A dropdown menu currently showing "No".
- Prisoner Id: Text input field.
- Unit: Text input field.
- Office: Text input field.
- Address 1: Text input field.
- Address 2: Text input field.
- Address 3: Text input field.
- City: Text input field.
- State: Text input field.
- Zip: Text input field.
- Country: Text input field.
- Prison: Dropdown menu.
- Phone: Text input field.
- Fax: Text input field.
- Email: Text input field.
- Party text: Text input field.
- Start date: Date picker showing "10/26/2017".
- End date: Date picker.
- Corporation: Dropdown menu showing "No".
- Notice: Dropdown menu showing "Yes".

At the bottom of the form, there is a green "Add Party" button and a blue "Start a New Search" link.




Title	Add Doctor or Dr., Officer. Mrs., Mr. etc.
Role	Select the party’s role from the drop-down list.
Pro Se	Leave at default.
Prisoner Id	Unless otherwise directed in this manual, always leave the prisoner Id field blank.
Unit	Leave blank, unless applicable for a prisoner case.

Office Address 1-3 City State Zip Country Prison Phone Fax E-mail	Leave these fields blank UNLESS the party is a pro se. If the party is pro se, enter their mailing address information in the applicable fields for mailing purposes.
Party text	Enter party text, if applicable. <i>Note: Party text is descriptive information about the party, (e.g. In his official capacity, Commissioner of Social Security etc.) and will be found in the caption of the initiating document. DO NOT enter alias information.</i>
Start date	Leave blank.
End Date	Leave blank.
Corporation	If the party is a corporation, select “yes.” If the party is an individual, select “no.”
Notice	Leave at the “yes” default.



Note: Click the *Expand All* hyperlink located at the top of the side panel window to view each party you have added thus far.

Note: If applicable, once the names have been added to the left-hand side of the screen you are then able to click on the “Alias...” icon, located under the party name, to enter an alias for the party.

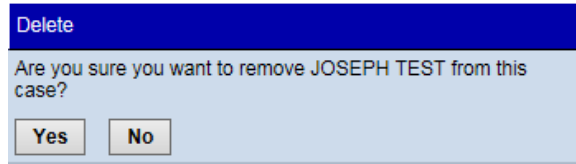
Icon	Action
	You can remove a party, an alias, or a corporate parent/affiliate
	You can make edits to a party’s name, alias, or corporate parent/affiliate
	Add an Alias or Add a corporate parent or affiliate

- Do not add a “Corporate Parent or Other Affiliate.” *If disclosures of Corporate Affiliations are going to be filed, it will be at the same time of filing the disclosure that the corporate parent/affiliate will be added.*
- CM/ECF automatically adds you as an attorney filer once you file your initiating document.

Note: *If you are filing a complaint or a petition for removal, all additional attorneys who may have signed that initiating document, must electronically file his/her own Notice of Appearance or a Notice of Special Appearance (if you are not admitted to practice in this district) pursuant to Local Civil Rule 83.1(d) after the lead event has been docketed. The attorney who filed the complaint or petition for removal will automatically be added to the case and will not need to file a separate Notice of Appearance.*

Note: *If you are filing a petition for removal, the Clerk's Office will add all plaintiff attorneys of record.*

Note: *If you make an edit or delete a name from the list, you will be asked if you are sure you want to make this change.*



If you click [Yes], the following screen will display.

The changes you made have been temporarily stored for processing. If you need to make more changes, use the case participant tree to navigate. You must click **Update Case** or **Create Case** to save the changes to the case.

Step 7: **Search for the Next Party Screen Displays:** Repeat steps 5-7, until all parties (plaintiffs and defendants) have been added. You may have to click [Add New Party] in the left hand corner of the screen to get back to the party search screen.

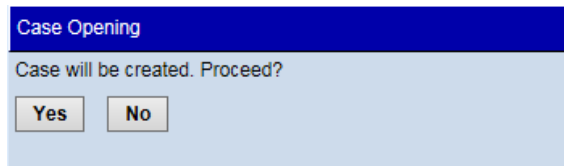
Step 8: **Verification Screen Displays:** Verify each party has been added to the case and any aliases have been entered.



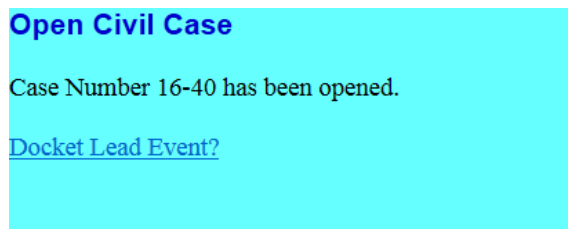
Step 9: Click [Create Case] once all names have been verified.



Step 10: Message Screen Displays: “Case will be created. Proceed?” with a yes or no option.



Step 11: If you selected “Yes” your case number will display with a hyperlink to docket the lead event, Transaction complete. Proceed to the next section “Case Number.”



Case Numbered Issued

Add the case number you received from the CM/ECF system to the court caption of the complaint and other initiating documents being filed then convert them to PDF documents.

Summons(es)

Form Name	Link
AO 440 Summons in a Civil Action	http://www.uscourts.gov/forms/civil-forms

Step 1: Complete the summons(es) in Adobe® interactive format and e-mail it to newcases@ncmd.uscourts.gov.

Step 2: The Clerk's Office will electronically issue and file the summons(es).

Note: *The Filing User will receive a NEF that the summons(es) were issued.*

Step 3: They should be printed for service.

Note: *Service of process must be performed in the traditional manner in accordance with the Federal Rules.*

Step 4: Once the summons(es) have been served, docket the **Affidavit of Service**.
[Civil > Service of Process \(Initiating Pleadings and Service\) > Affidavit of Service.](#)

Docket Lead Event

If applicable, always docket the Application to Proceed In Forma Pauperis as the first entry and then docket the Complaint or Petition for Removal.

Type of Plaintiff	Form Name and Link
Prisoners	Declaration and Request to Proceed In Forma Pauperis.
Non-Prisoner	AO 239 Application to Proceed in District Court Without Prepaying Fees or Costs (Long Form) AO 240 Application to Proceed in District Court Without Prepaying Fees or Costs (Short Form)

If filing a/an...	Then...
Application to Proceed In Forma Pauperis (IFP)	Civil > Motions > Application to Proceed IFP
Complaint	Civil > Complaints, Other Initiating Documents > Complaint
Petition for Removal	Civil > Complaints, Other Initiating Documents > Petition for Removal

SECTION 7 - ANSWER TO COMPLAINT

Docketing Steps

Filing Users whose initial document is an answer will be given the opportunity to affiliate themselves to the party that they are representing, without having to file a separate Notice of Appearance. A Notice of Appearance or a Notice of Special Appearance (if you are not admitted to practice in this district) pursuant to Local Civil Rule 83.1(d) will have to be filed separately for any other attorney that signed the answer but did not electronically file it.

To electronically file an answer, follow the steps below.

Step 1: Select the Type of Filing: From CM/ECF, select **Civil** from the blue menu bar.

Step 2: Select the Type of Document: Click **Answers to Complaints** under the Initial Pleadings and Service category.

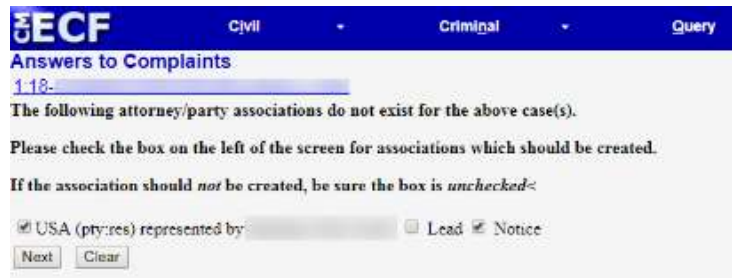
Step 3: Enter the Case Number Screen: Enter the case number and click [Next].

Note: If the case you are docketing to has multiple cases associated with it or has been consolidated, a Spread Docket Text Screen will display. See the resource section for more information about spreading docket text.

Step 4: Select the Filing Party Screen: Select the name of the party on whose behalf you are filing the answer. If you are filing on behalf of more than one party, you may select multiple parties by holding the control [Ctrl] key down while clicking each of the parties. Click [Next] once the party or parties have been selected.

Step 5: Attorney/Party Association Screen: This screen will display if this is the first time you are filing something in this case. See the list below and click [Next]. Proceed to step 6 if you previously filed something on this case and already linked yourself to a party.

- Leave the box checked that identifies the party that is being represented by you.
- Leave the Notice box checked. This will ensure that you receive electronic notices on this case.
- The Lead box is optional. If you check this box, the docket sheet will reflect that you are the lead attorney on this case.



Step 6: Document Selection Screen Displays: This screen lists the docket entries for all complaints, counterclaims, cross claims and third party complaints for which an answer is still due. Check the box next to the applicable event that is being answered and click [Next].

Step 7: Browse for the Main Document PDF Screen: Click [**Browse**] to select the PDF image of the document to be filed, then click [Next].

Note: If applicable, browse for any attachments that coincide with this filing.

If...	Then...
Social Security Case	Proceed to step 10.
Other Cases	Proceed to step 8.

Step 8: Question Screen Displays: Does this filing include a counterclaim, cross claim or third party complaint? If applicable, check the appropriate box(es) and click [Next].

If...	Then...
Yes	Proceed to step 9.
No	Proceed to step 10.

Step 9: Select the Party that the Filing is Against: Select the party whom the filing is against and click [Next].

Note: If applicable, hold down the “Ctrl” button on the keyboard to click multiple names.

Note: If the party you represent is not listed in the “Select the Party” box, click [New Party] and perform a search for the party in the court’s CM/ECF system. Some names may already be in the CM/ECF database, depending on the popularity of the name. Thoroughly search for the party’s last name or the company’s name before adding a new record to the database.

*In the Last/Business Name field, type the first few letters of the party’s last name for an individual or the first few letters of the company name. Although system searches are not case sensitive, this district requires that all new parties be added in **ALL CAPS** format. Click [Search].*

Correct Example: JOHN W SMITH JR
NORTH CAROLINA BAR

Incorrect Example: John W. Smith, Jr.
THE NORTH CAROLINA BAR

If an exact match...	Then...
Is found	<ul style="list-style-type: none"> • Highlight the name • Click [Select Party] • Review the party information and select the party's role in this filing. <p style="text-align: center;"><i><u>Note:</u> Use the "Party text" field to add additional information to describe your party. Information added to this field is case specific and will not be transferred to all cases in the system using that particular party name.</i></p> <p>Examples:</p> <p><u>For a Company:</u> Last Name Field = ABC CORPORATION Party Text Field = A NORTH CAROLINA CORPORATION</p> <p><u>For an Individual:</u> Last Name Field = SMITH Middle Name Field = H. First Name Field = JOHN Party Text Field = WARDEN</p> <ul style="list-style-type: none"> • Click [Add Party]

Step 10: Question Screen Displays: Does this Answer include a jury demand? Select the appropriate response and click [Next].

Step 11: Modify Text Screen: If applicable, add any desired text to the docket entry, then click [Next].

Counterclaim (No Jury Demand) Example



Docket Text: Modify as Appropriate.
ANSWER to [1] Complaint, Counterclaim against by JOE DEFENDANT.
(Attachments: # (1) Exhibit 1 - Contract) (student6,)
Next Close

Crossclaim (No Jury Demand) Example



Docket Text: Modify as Appropriate.
ANSWER to [1] Complaint CROSSCLAIM against JOE PLAINTIFF by JOE DEFENDANT. (Attachments: # (1) Exhibit 1 - Contract) (student6,)
Next Close

Third Party Complaint (No Jury Demand) Example



Docket Text: Modify as Appropriate.
ANSWER to [1] Complaint THIRD PARTY COMPLAINT against JOE PLAINTIFF by JOE DEFENDANT. (Attachments: # (1) Exhibit 1 - Contract) (student6,)
Next Close

If you selected YES to Jury Demand Example



Docket Text: Modify as Appropriate.
ANSWER to [1] Complaint with Jury Demand THIRD PARTY COMPLAINT against JOE PLAINTIFF by JOE DEFENDANT. (Attachments: # (1) Exhibit 1 - Contract) (student6,)
Next Close

Step 12: Final Text Screen: Verify that the docket text is correct, and the correct files have been uploaded and click [Next].

Complete: Notice of Electronic Filing Screen Displays: Transaction complete.

SECTION 8 - CIVIL EVENTS FEATURE

Docketing in a Civil Case

After successfully logging into CM/ECF, follow these steps to file a document. The process is similar for filing any document in the CM/ECF system. There may be some different screens that display when filing other documents, but for the most part they are the same.

For this example, the following steps will refer to how to electronically file a Motion for Preliminary Injunction with the CM/ECF system.

- Select the Type of Filing: Select **Civil** from the blue menu bar.

- Select the Type of Document: Select the type of document under the applicable category. For example, if filing a Motion to Suppress, select **Motions** under the Motions and Related Filings category.

- Select the Applicable Event Screen: Select the applicable event from the list of available events and click [Next]. For example, if filing a Motion for Preliminary Injunction, select Preliminary Injunction.

- Enter the Case Number Screen: Enter the case number and click [Next].

- Select the Filing Party Screen: Select the name of the filing party and click [Next].

***Note:** If there are multiple names, hold down the [Ctrl] key and click on the names to be selected.*

***Note:** If your party does not appear, double check to make sure you are filing in the correct case.*

***Note:** Click [New Filer] in the rare case you need to add a party to the CM/ECF system. See the “How to Add a New Filer” section in the resource section for assistance.*

- **Browse for the Main Document and Attachments PDF Screen:** Click **[Browse]** to select the PDF image of the main document to be filed. There is a 50 MB total size limit on the documents, main and attachments combined, that can be uploaded to the CM/ECF system.

Note: *It is recommended that you preview the document before you upload.*

Note: *Briefs filed pursuant to Local Rule 7.2 should be filed as a **separate** docket entry. The brief should be linked to the motion to which it relates.*

Note: *The proposed order (when required) should be uploaded as an attachment to the motion in PDF format and a copy should be e-mailed to the assigned District Judge or Magistrate Judge in a Word compatible format. See the *Electronic Case Filing Administrative Policies and Procedures Manual (Section L: Orders and Judgments)* for details.*

Attachments and Exhibits that can be scanned.

Note: *If applicable, browse for any attachments that support this filing. Select a Category and/or type a brief description of the attached document, then click [Next]. Your filing will be considered deficient if this task is not performed.*

Attachments and Exhibits that cannot be scanned.

Attachments or exhibits that cannot be scanned for e-filing and can be submitted to the Clerk's Office in paper format may be filed using the following method:

- E-file a **notice of manual filing** (event) indicating that certain attachments have not been scanned and will be, instead, filed with the Clerk's office.
 - Print the resulting Notice of Electronic Filing (NEF),
 - Attach it to the paper exhibits, and
 - Submit it to the Clerk's Office. Paper attachments submitted in this manner will be considered filed as part of the e-filed pleading.
-
- Response to Motion Deadline Screen Displays: *(This screen only displays when filing documents with a deadline associated with them)* **DO NOT CHANGE DATE, LEAVE AT DEFAULT. The response due dates are automatically calculated by the system.**
 - Modify Text Screen: If applicable, select an option from the drop-down menu at the beginning of the text and/or add any desired text to the docket entry in the applicable field, then click [Next].

- **Final Text Screen:** This screen displays the following warning, **“Attention!! Pressing the NEXT button on this screen commits this transaction. You will have no further opportunity to modify this transaction if you continue.”**
 - At this point or any time prior to this point, the filer can abort this CM/ECF filing or return to a previous screen by:
 - Clicking on any hyperlink on the blue menu bar. The CM/ECF system will reset to the beginning of the process.
 - Clicking the browser [Back] button until you return to the desired screen.
- Note:** If you click the browser [Back] button and correct a screen, the screens that follow all reset to the original defaults.*
- Verify that the docket text is correct, and the correct files have been uploaded and click [Next].
- **Notice of Electronic Filing Screen Displays:** Transaction complete. See descriptions on the next page.



	Description
1	Notice of Electronic Filing (NEF) - Represents your Certificate of Service. The Court strongly urges you to copy it to a file on your computer hard-drive, print it, and retain a hard copy in your personal files.
2	The date of the transaction.
3	The time of the transaction.
4	Case information; case name, case number, and filer.
5	The document number assigned to the entry.
6	The docket text, including any modifications.
7	This section will display each attorney and/or party who has consented to electronic service for this case.
8	This section will display the names and addresses of individuals who will not be electronically notified of the filing. It is the Filing Users responsibility to serve hard copies of the pleading and the notice of Electronic Filing to the attorneys and pro se parties who are not set up for electronic notification.
9	Each document that is uploaded to the CM/ECF system gets its own unique electronic document stamp.

E-Mail Notification of Documents that were filed:

- After a pleading is electronically filed, the CM/ECF System sends a **Notice of Electronic Filing** to the designated attorneys and parties who have supplied their E-mail addresses to the Court. Individuals who receive electronic notification of the filing are permitted one "free look" at the document by clicking on the associated hyperlinked document number embedded in the **Notice of Electronic Filing**. If the document is a sealed document, a party who has authorization to view the document must login to CM/ECF (not PACER) before viewing the sealed document. It is suggested that you note the document number assigned on your copy of the PDF file residing on your hard drive. The Court strongly urges you to copy the **Notice of Electronic Filing** and pleading documents to your hard-drive for future access. Subsequent retrieval of the case docket sheet and pleading from CM/ECF must be made through your PACER account and is subject to regular PACER fees.

SECTION 9 - CRIMINAL EVENTS FEATURE

Docketing in a Criminal Case

After successfully logging into CM/ECF, follow these steps to file a document. The process is similar for filing any document in the CM/ECF system. There may be some different screens that display when filing other documents, but for the most part they are the same.

For this example, the following steps will refer to how to electronically file a Motion to Suppress with the CM/ECF system.

- Select the Type of Filing: Select **Criminal** from the blue menu bar.
- Select the Type of Document: Select the type of document under the applicable category. For example, if filing a Motion to Suppress, select **Motions** under the Motions and Related Filings category.
- Enter the Case Number Screen: Enter the case number and click [Next].
- Select the Filing Party Screen: Select the name of the filing party and click [Next].

Note: If there are multiple names, hold down the [Ctrl] key and click on the names to be selected.

Note: If your party does not appear, double check to make sure you are filing in the correct case.

Note: Click [New Filer] in the rare case you need to add a party to the CM/ECF system. See the “How to Add a New Filer” section in the resource section for assistance.

- Select the Applicable Event Screen: Select the applicable event from the list of available events and click [Next]. For example, if filing a Motion to Suppress, select Suppress.

- Browse for the Main Document and Attachments PDF Screen: Click [Browse] to select the PDF image of the main document to be filed. There is a 50 MB total size limit on the documents, main and attachments combined, that can be uploaded to the CM/ECF system.

Note: It is recommended that you preview the document before you upload.

Note: Briefs filed pursuant to Local Rule 7.2 should be filed as a separate docket entry. The brief should be linked to the motion to which it relates.

*Note: The proposed order (when required) should be uploaded as an attachment to the motion in PDF format and a copy should be e-mailed to the assigned District Judge or Magistrate Judge in a Word compatible format. See the *Electronic Case Filing Administrative Policies and Procedures Manual (Section L: Orders and Judgments)* for details.*

Attachments and Exhibits that can be scanned.

Note: If applicable, browse for any attachments that support this filing. Select a Category and/or type a brief description of the attached document, then click [Next]. Your filing will be considered deficient if this task is not performed.

Attachments and Exhibits that cannot be scanned.

Attachments or exhibits that cannot be scanned for e-filing and are allowed to be submitted to the Clerk's Office in paper format may be filed using the following method:

- E-file a **notice of manual filing** (event) indicating that certain attachments have not been scanned and will be, instead, filed with the Clerk's office.
 - Print the resulting Notice of Electronic Filing (NEF),
 - Attach it to the paper exhibits, and
 - Submit it to the Clerk's Office. Paper attachments submitted in this manner will be considered filed as part of the e-filed pleading.
-
- Response to Motion Deadline Screen Displays: *(This screen only displays when filing documents with a deadline associated with them)* **DO NOT CHANGE DATE, LEAVE AT DEFAULT. The response due dates are automatically calculated by the system.**
 - Modify Text Screen: If applicable, select an option from the drop-down menu at the beginning of the text and/or add any desired text to the docket entry in the applicable field, then click [Next].

- Final Text Screen: This screen displays the following warning, **“Attention!! Pressing the NEXT button on this screen commits this transaction. You will have no further opportunity to modify this transaction if you continue.”**
 - At this point or any time prior to this point, the filer can abort this CM/ECF filing or return to a previous screen by:
 - Clicking on any hyperlink on the blue menu bar. The CM/ECF system will reset to the beginning of the process.
 - Clicking the browser [Back] button until you return to the desired screen.
- Note: If you click the browser [Back] button and correct a screen, the screens that follow all reset to the original defaults.*
- Verify that the docket text is correct, and the correct files have been uploaded and click [Next].
- Notice of Electronic Filing Screen Displays: Transaction complete. See descriptions on next page.



	Description
1	Notice of Electronic Filing (NEF) - Represents your Certificate of Service. The Court strongly urges you to copy it to a file on your computer hard-drive, print it, and retain a hard copy in your personal files.
2	The date of the transaction.
3	The time of the transaction.
4	Case information; case name, case number, and filer.
5	The document number assigned to the entry.
6	The docket text, including any modifications.
7	This section will display each attorney and/or party who has consented to electronic service for this case.
8	This section will display the names and addresses of individuals who will not be electronically notified of the filing. It is the Filing Users responsibility to serve hard copies of the pleading and the notice of Electronic Filing to the attorneys and pro se parties who are not set up for electronic notification.
9	Each document that is uploaded to the CM/ECF system gets its own unique electronic document stamp.

E-Mail Notification of Documents that were filed:

- After a pleading is electronically filed, the CM/ECF System sends a **Notice of Electronic Filing** to the designated attorneys and parties who have supplied their E-mail addresses to the Court. Individuals who receive electronic notification of the filing are permitted one "free look" at the document by clicking on the associated hyperlinked document number embedded in the **Notice of Electronic Filing**. If the document is a sealed document, a party who has authorization to view the document must login to CM/ECF (not PACER) before viewing the sealed document. It is suggested that you note the document number assigned on your copy of the PDF file residing on your hard drive. The Court strongly urges you to copy the **Notice of Electronic Filing** and pleading documents to your hard-drive for future access. Subsequent retrieval of the case docket sheet and pleading from CM/ECF must be made through your PACER account and is subject to regular PACER fees.

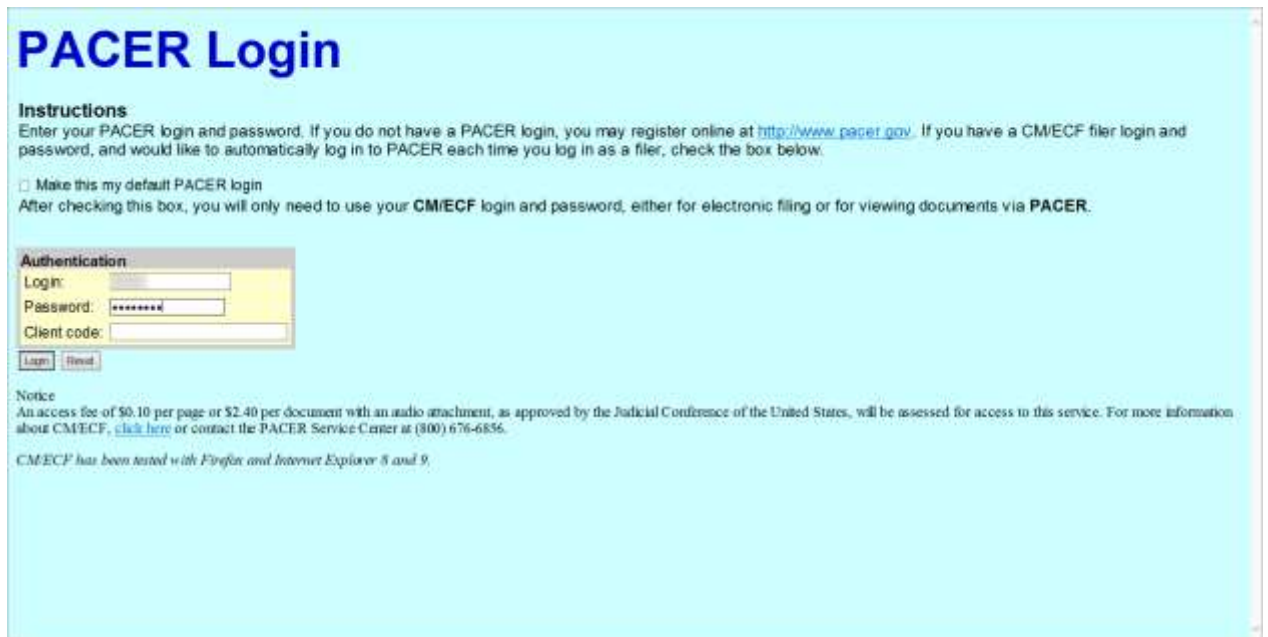
SECTION 10 - OBTAINING INFORMATION FROM CM/ECF SYSTEM

Query Feature

- Registered PACER Users can use this feature to query the CM/ECF system for specific case information. To enter the Query mode, click Query on the blue menu bar in CM/ECF.



- CM/ECF opens the **PACER Login** screen.

A screenshot of the PACER Login screen. The title is 'PACER Login' in large blue font. Below the title is an 'Instructions' section with text: 'Enter your PACER login and password. If you do not have a PACER login, you may register online at <http://www.pacer.gov>. If you have a CM/ECF filer login and password, and would like to automatically log in to PACER each time you log in as a filer, check the box below.' There is a checkbox labeled 'Make this my default PACER login'. Below this is another instruction: 'After checking this box, you will only need to use your CM/ECF login and password, either for electronic filing or for viewing documents via PACER.' An 'Authentication' form is shown with three input fields: 'Login:', 'Password: *****', and 'Client code:'. Below the fields are 'Login' and 'Reset' buttons. At the bottom, there is a 'Notice' section with text: 'An access fee of \$0.10 per page or \$2.40 per document with an audio attachment, as approved by the Judicial Conference of the United States, will be assessed for access in this service. For more information about CM/ECF, [click here](#) or contact the PACER Service Center at (800) 676-6836. CM/ECF has been tested with Firefox and Internet Explorer 8 and 9.'

Note: *Your PACER login and password are different from your CM/ECF login and password. You must have a PACER account to retrieve, view, and print certain documents. You will be charged a fee to access documents, docket sheets, etc. from PACER.*

- After you enter your PACER login and password, CM/ECF opens the Query screen depicted below.

Query

WARNING: Search results from this screen are NOT subject to the 30 page limit on PACER charges. Please be as specific as possible with your search criteria.

Search Clues [Mobile Query](#)

Case Number

or search by

Case Status: Open Closed All

Filed Date to

Last Entry Date to

Nature of Suit
 0 (zero)
 110 (Insurance)
 120 (Contract: Marine)

Cause of Action
 0 (no cause specified)
 02:0138 (Library of Congress Access)
 02:0358 (President's Recommendations on Exec. Jud. & Leg. Salary)

Last Business Name Exact matches only

First Name Middle Name

Type

- 1 If you know the case number the Court has assigned to the case, enter it in the case number field and click [Run Query].
- 2 You can search for a case, or narrow your search results down, by selecting a nature of suit.
- 3 You can search for a case, or narrow your search results down, by selecting a nature of suit.
- 4 You can search for a case by a person's name. Enter at least two characters of the last name (Examples: Desoto, Dev*). Use an asterisk as a substitute for unknown letters (e.g. Jo* will find Jones, Johnson, Joseph etc). You may enter lowercase or uppercase letters, or both (the search is not "case sensitive").

You may also check the box for "Exact Matches Only," the results will return only exact matches to the search string entered in the "Last Business Name" search field.

You can also search by the "Type" of party, i.e. applicant attorney etc.

- The mainly used options are listed below;

1:18- INCORPORATED

UNASSIGNED, presiding
 JOI ELIZABETH PEAKE, referral
Date filed: 12/03/2018
Date of last filing: 03/18/2019

[Mobile Query](#)

Query

- [Alias](#)
- [Associated Cases](#)
- 1 [Attorney](#)
- 2 [Case File Location...](#)
- 3 [Case Summary](#)
- 4 [Deadlines/Hearings...](#)
- 5 [Docket Report...](#)
- [Files](#)
- [History/Documents...](#)
- [Party](#)
- [Related Transactions...](#)
- [Status](#)
- [View a Document](#)

Deadlines/Hearings

1:18-
UNASSIGNED, presiding
JOI ELIZABETH PEAKE, referral
Date filed: 12/03/2018
Date of last filing: 03/18/2019

[Mobile Query](#)

Query

[Alias](#)
[Associated Cases](#)
[Attorney](#)
[Case File Location...](#)
[Case Summary](#)
[Deadlines/Hearings](#)
[Docket Report...](#)
[Files](#)
[History/Documents...](#)
[Party](#)
[Related Transactions...](#)
[Status](#)
[View a Document](#)

Deadlines/Hearings

Sort by: Due/Set

Pending deadlines/hearings
 Terminated/satisfied deadlines/hearings

Run Query Clear

For each deadline or hearing, sit/satisfied/terminated dates are shown. You can click the gray ball to see the docket entry that resulted in the setting of the deadline. You can click the document number to display the actual Scheduling Order.

As you set your parameters for this query, you can also select whether the results should show only deadlines/hearings that are pending, or terminated/satisfied, or both.

1:18-cv-
UNASSIGNED, presiding
JOI ELIZABETH PEAKE, referral
Date filed: 12/03/2018
Date of last filing: 03/18/2019

Deadlines/Hearings

Doc. No.	Deadline/Hearing	Event Filed	Due/Set	Satisfied	Terminated
	[X] Answer	02/22/2019	03/19/2019		
2	[X] Response to Motion Deadline	03/14/2019	04/04/2019		
11	[X] Initial Pretrial Conf. Hearing	03/18/2019	04/25/2019 at 09:30 AM		

***** Not all hearings/deadlines may appear in report. Reliance on dates/hearings set in CM/ECF does not excuse late filings or failure to appear. *****

Docket Report

1:19-cv-
CATHERINE C. EAGLES, presiding
JOE L. WEBSTER, referral
Date filed: 02/25/2019
Date of last filing: 03/11/2019

[Mobile Query](#)

Display the formatted docket sheet with links to documents.

Query

- [Alias](#)
- [Associated Cases](#)
- [Attorney](#)
- [Case File Location](#)
- [Case Summary](#)
- [Deadlines/Hearings](#)
- [Docket Report](#)
- [Filers](#)
- [History/Documents](#)
- [Party](#)
- [Related Transactions](#)
- [Status](#)
- [View a Document](#)

Docket Sheet

Case Number: 1:19-cv-4

* Filed to
 Entered

Documents to

Include:

- Parties and counsel
- Terminated parties
- List of member cases
- Links to Notices of Electronic Filing

Document options:

- View multiple documents
- Create Appendix

Format:

- HTML (unpaginated)
- PDF (paginated)

Start by: Oldest date first

Run Report

You may select a date range for your docketing report as well as a range of docketing numbers. If you leave the range fields blank, CMECF will default to print the entire docketing report.

You may have options to view or download selected documents or produce a PDF "appendix" containing the docket sheet and selected documents.

Place a checkmark in the box next to Links to Notices of Electronic Filing if you wish to view them from the docket sheet.

After you have selected the parameters for your report, click (Run Report). CMECF will run your custom docketing report and display it in a window as depicted below.

Date Filed	Document Text	Document Number
02/25/2019	APPLICATION to Proceed in Part	1
02/25/2019	COMPLAINT against All Defendants, filed by	1
02/25/2019	Case Assigned to Judge CATHERINE C. EAGLES and Magistrate Judge JOE L. WEBSTER	1
02/25/2019	CASE REFERRED by Screening	1
02/25/2019	ORDER AND REC CONSTITUTION OF UNITED STATES MAGISTRATE JUDGE signed by MAGISTRATE JUDGE JOE L. WEBSTER on 02/25/2019. Due to being prepared online for printing this Order and Recommendation, IT IS HEREBY ORDERED that Plaintiff's fees shall be deemed to pay for the Clerk of the Court 20% of all deposits in the amount standing with the receipt of April of 2019, and Money for both have that be entered in the account number 503 28 and for 50% of filing fee has been paid. IT IS HEREBY ORDERED that the action be dismissed pursuant to 28 U.S.C. § 1915A, for being frivolous and for failing to state a claim upon which relief can be granted.	1
02/25/2019	ORDER granting Plaintiff's Application to Proceed in Part signed by MAGISTRATE JUDGE JOE L. WEBSTER on 02/25/2019. See [Order and Recommendation] (Entered: 02/25/2019)	2
02/25/2019	Notice of Meeting Reconsideration, Objections to RAR due by 3/14/2019. Objections to RAR. See [Order and Recommendation] (Entered: 02/25/2019)	3
02/25/2019	AMENDED COMPLAINT against All Defendants, filed by	4
03/11/2019	ORDER TO RECONSIDERED BILLING. MAGISTRATE JUDGE JOE L. WEBSTER on 03/11/2019. Response to Objections to RAR due by 3/14/2019. (Attachments: # 1) Receipts - Print and Back. (Entered: 03/11/2019)	5
03/11/2019	CASE REFERRED to 2 Objections to Recommended Rating. Magistrate Judge, [Amended] Complaint, [RECONSIDERED BILLING. MAGISTRATE JUDGE JOE L. WEBSTER on 03/11/2019] to MAGISTRATE JUDGE JOE L. WEBSTER	6
03/11/2019	COMPLAINT to 2 Objections to Recommended Rating. Magistrate Judge, filed by Plaintiff	7
03/11/2019	COMPLAINT to 2 Objections to Recommended Rating. Magistrate Judge, filed by Plaintiff	8

- The document numbers in the middle column are hyperlinks to PDF files of the actual documents. Click the button next to the document number and the **Electronic Notification Report** for the document will display.

History/Documents

1:19-cv-
CATHERINE C. EAGLES, president
JOE L. WEBSTER, referral
Date filed: 02/25/2019
Date of last filing: 03/11/2019

This selection queries the database for case event history and documents associated with the case.

Mobile Query

Query

[Alias](#)
[Associated Cases](#)
[Attorney](#)
[Case File Location...](#)
[Case Summary](#)
[Deadlines/Hearings...](#)
[Docket Report...](#)
[Filers](#)
[History/Documents...](#)
[Party](#)
[Related Transactions...](#)
[Status](#)
[View a Document](#)

History/Documents

All events (history)
 Only events with documents

Display docket text

Sort by: Oldest date first

Run Query Clear

You may select the sort order for the query report and choose to display all events or only those with documents attached. CMECF also offers you the option to display the docket text in the report.

This particular report lists all of the events and documents associated with the case in reverse chronological order. It would also display the docketing text for all docketed events if that selection was made on the previous screen.

History

Doc No.	Date	Description
1	Filed: 02/25/2019	Application to Proceed EP
	Entered: 02/26/2019	
	Discontinued: 02/28/2019	
2	Filed: 02/25/2019	Completed
	Entered: 02/26/2019	Case Disposed
	Filed of Judgment: 02/26/2019	Case Disposed
	Filed of Judgment: 02/26/2019	Case Disposed for Settlement
	Discontinued: 02/28/2019	
	Filed of Judgment: 02/26/2019	Order on Motion for Application to Proceed EP
	Filed of Judgment: 02/26/2019	Unaccompanied Petition - Inappropriate Petition
	Filed of Judgment: 02/26/2019	Order of Final Case Disposition/Dismissal
	Filed: 02/26/2019	Amendment to Caption
	Filed of Judgment: 02/26/2019	Order on Motion for Application to Proceed EP - Unaccompanied Petition
	Filed of Judgment: 02/26/2019	Order on Motion for Application to Proceed EP - Unaccompanied Petition

After making your selections, click [Run Query]. CMECF queries the database and builds your report.

- You may view a PDF file of actual documents by clicking on the document number in the far-left column of the report. Click the gray button next to the document description to view the **Electronic Notification Report** for the document.

Reports Feature

- The Reports feature of CM/ECF provides the user with several report options. After selecting the **Reports** option from the blue menu bar, CM/ECF opens the **Reports** screen depicted below.



Docket Sheet

- Click the **Docket Sheet** hyperlink and CM/ECF will open the docket Sheet report query window depicted below.



Docket Sheet

Case Number
1:19-cv-1

* Filed to
 Entered

Documents to

Include:
 Parties and counsel
 Terminated parties
 List of member cases
 Links to Notices of Electronic Filing

Document options:
 View multiple documents
 Create Appendix

Format:
 HTML (unpaginated)
 PDF (paginated)

Sort by: Oldest date first

Run Report

Callouts:

- You may select a date range for your docketing report as well as a range of docketing numbers. If you leave the range fields blank, CM/ECF will default to print the entire docketing report.
- You may have options to view or download selected documents or produce a PDF "appendix" containing the docket sheet and selected documents.
- Place a checkmark in the box next to Links to Notice of Electronic Filing if you wish to view them from the docket sheet.
- After you have selected the parameters for your report, click [Run Report]. CM/ECF will run your custom docketing report and display it in a window as depicted below.

Civil Cases Report

Civil Cases Report

Warning: This report is not subject to the 30 page billing cap.
You will be billed for the total number of pages. If you want to run a report for a single case, you can use the Query Menu or the Docket Report.

Office
Chapel Hill
Durham

Case type
Attorney Admissions
Civil

Nature of suit
0 (zero)
110 (insurance)

Cause
0 (no cause specified)
02:0138 (Library of Congress ...)

Jurisdiction
Diversity
Federal Question

Case flags
18AG
18BA

Terminal digit(s) 2, 4-7 Open cases
JPML number Closed cases

Filed 3/15/2019 to 3/22/2019

Sort by Case Number

Output Format * Formatted Display
 Data Only

Make these options my default.

Displays summary data about selected civil cases, plus links to view more detailed information about each case. Some selection criteria are available only to court staff.

Note: *If you leave all fields blank, CM/ECF will display a report for all cases opened in CM/ECF.*

- The far-left column of the Cases Filed report contains hyperlinked case numbers. If you click on a case number, CM/ECF opens the **Docket Sheet** report window from which you can retrieve the docket sheet for the selected case. Follow the instructions in the previous section for the **Docket Report**.

SECTION 11 - SPECIAL PROCEDURES

Appeals

1. **Filing** - A notice of appeal should be filed electronically as outlined in the Docketing in a Civil, on page 38 or Docketing in a Criminal Cases Criminal Cases on page 43 of this manual. The electronic notice constitutes the copy the clerk is required to serve under Fed. R. App. P. 3(d).

Civil > Other Filings > Appeal Documents > Notice Appeal

2. **Fees** - If you are filing a motion for leave to appeal **in forma pauperis**, it should be electronically filed immediately after filing the notice of appeal. If you are paying the fee, it must be remitted to the Clerk's office within 24 hours (excluding weekends, holidays, and days the court is closed) of filing the notice of appeal.
3. Follow instructions as directed by the 4th Circuit Court of Appeals.

<http://www.ca4.uscourts.gov/docs/pdfs/cmecfusermanual.pdf>

Briefs

Briefs filed pursuant to **Local Rule 7.2** should be filed as a **separate** docket entry and be **linked** to the motion to which it relates.

Certificate of Service

Effective December 1, 2018, **Fed. R. Civ. P. 5(d)(1)(B)** was amended eliminating the requirement for a certificate of service when service is made via CM/ECF. A certificate of service on all parties entitled to service of notice is only required when a party serves a document through means other than filing it CM/ECF. The certificate of service must state the manner in which service was accomplished on each party entitled to service or notice. The certificate of service may be filed as a part of the document or as a separate document.

- a) **As a Part of the Document** - Before converting your document to PDF and filing it electronically, check to see which parties will not be electronically noticed. Click on [Utilities, Mailing Info for a Case](#), and enter the case number. The CM/ECF system will show who will be electronically noticed and who will not. You can copy and paste the names of the parties who will be electronically noticed to a label maker.

Add a traditional certificate of service to your document, stating specifically to whom copies were mailed. It is not sufficient to state that copies will be mailed to any party not electronically noticed. Then file your document as outlined in [Section E of the Electronic Case Filing Administrative Policies and Procedures Manual](#).

- b) **As a Separate Document** - If you file your document and notice that a party, was not sent a notice of electronic filing, you can create and file a separate certificate of service. A sample certificate of service is contained in the [Form B section of the Electronic Case Filing Administrative Policies and Procedures Manual](#).

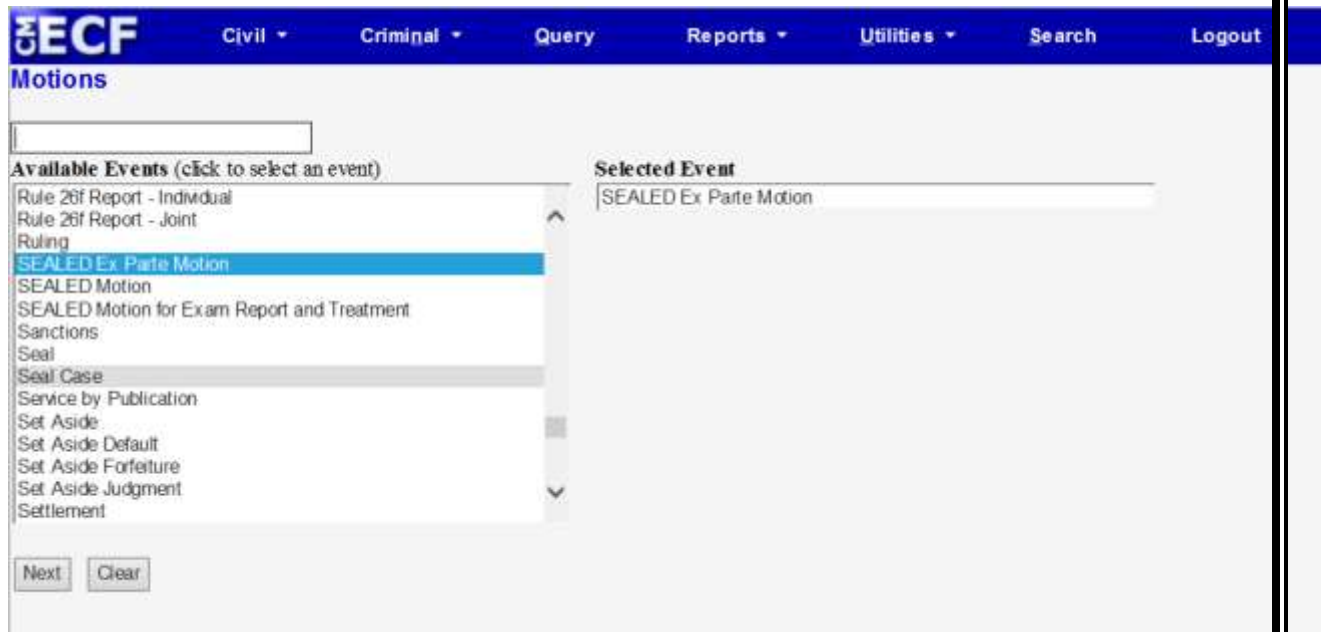
Certified, Notarized and Documents Authenticated by Other Means

Documents, which are certified, notarized or authenticated by other means, should be scanned and filed electronically. The Filing User is responsible for maintaining the original and making it available for inspection upon request by the court or another party. The Filing User shall retain the original document until two (2) years after the expiration of the time for filing a timely appeal of a final judgment or decree, or after receipt by the Clerk of Court of an order terminating the action on appeal.

Ex Parte Matters

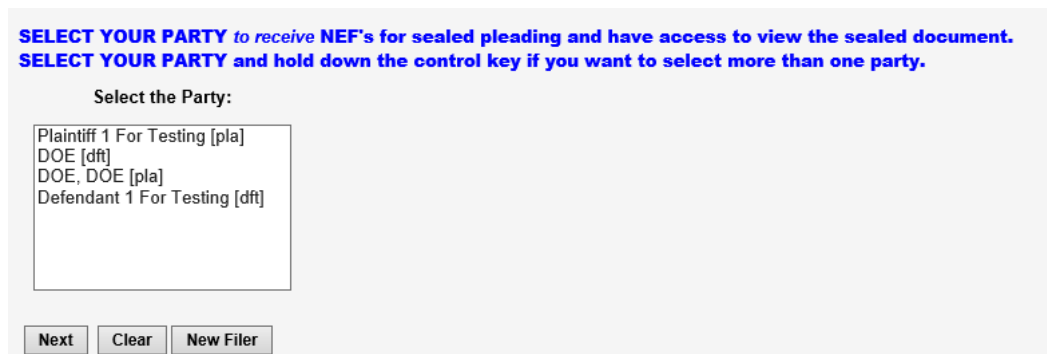
Parties can file an ex parte matter electronically using CM/ECF. A motion requesting permission to file an ex parte matter under seal shall include the ex parte matter as an attachment. The clerk shall treat the motion to seal and its attachment as sealed pending order of the court. (See Local Rule 7.4). To file a sealed ex parte motion, follow the below instructions.

Under Motions: Select SEALED Ex Parte Motion from the list of available events.



The screenshot shows the ECF Motions interface. At the top, there is a navigation bar with 'Civil', 'Criminal', 'Query', 'Reports', 'Utilities', 'Search', and 'Logout'. Below this is the 'Motions' section. A search box is present. The 'Available Events (click to select an event)' list includes: Rule 26f Report - Individual, Rule 26f Report - Joint, Ruling, SEALED Ex Parte Motion (highlighted in blue), SEALED Motion, SEALED Motion for Exam Report and Treatment, Sanctions, Seal, Seal Case, Service by Publication, Set Aside, Set Aside Default, Set Aside Forfeiture, Set Aside Judgment, and Settlement. The 'Selected Event' field shows 'SEALED Ex Parte Motion'. At the bottom of the list are 'Next' and 'Clear' buttons.

The Sealed Ex Parte Motion event along with the corresponding Sealed Ex Parte Memorandum and Ex Parte Documents restrict the docket entry and underlying documents from public view. During the docketing of the events, the Filing User will choose the parties to receive the NEF and to have access to the documents. Only the parties chosen will be able to see the documents. In addition, the Filing User MUST choose his/her name from the list of parties to view the documents.



The screenshot shows the 'SELECT YOUR PARTY' selection screen. It includes the following text: **SELECT YOUR PARTY to receive NEF's for sealed pleading and have access to view the sealed document. SELECT YOUR PARTY and hold down the control key if you want to select more than one party.** Below this is the instruction 'Select the Party:' followed by a list box containing: Plaintiff 1 For Testing [pla], DOE [dft], DOE, DOE [pla], and Defendant 1 For Testing [dft]. At the bottom are 'Next', 'Clear', and 'New Filer' buttons.

Exhibits

Exhibits should be filed as attachments to the document to which they relate. [See Section K of the Electronic Case Filing Administrative Policies and Procedures Manual](#) for information on filing attachments.

Each exhibit should be a **separate** attachment in PDF format.

Larger documents should be broken into sub-parts. For example, Exhibit 7 Part 1, Exhibit 7 Part 2, Exhibit 7 Part 3, etc.

Note: *Briefs filed pursuant to Local Rule 7.2 should **not** be filed as an exhibit or attachment to the document to which it relates.*

Filing Documents Under Seal

Use the following link for information on filing documents under seal.

<http://www.ncmd.uscourts.gov/sealed-document-guidance>

Removals

When removing a case from state court, you should:

Scan any state court documents to be filed. Each document should be scanned separately and docketed as an exhibit to the Petition for Removal.

- Complaint or Amended Complaint
- Summons
- Answer, if applicable

The Notice of Removal to adverse parties and to clerk of superior court should be docketed as a separate document.

Return of Service

Executed Summons

When docketing an executed summons, use the event [Affidavit of Service](#) in the CM/ECF system or use [Affidavit of Service on Government](#), whichever is applicable.

When an executed summons is docketed, CM/ECF will automatically enter the date an answer is due based upon the date party was served. The default setting is 60 days as to the United States and 21 days for any other party. If the case is one where a different amount of time in which to answer is permitted by statute, rule or court order, the date set by CM/ECF may not be accurate. If the date of service entered into CM/ECF is incorrect, the date set by CM/ECF will not be accurate.

Note: *Reliance on dates/hearings set in CM/ECF does not excuse late filings or failure to appear.*

The following variations to the basic steps of electronic filing will occur when you are filing an executed return of service:

- A return of service should be filed by Plaintiff's counsel electronically, not submitted directly to the Court by a private process server. The only occasion when a return is filed directly with the Court is if the U.S. Marshal was directed to make service, or the party filing the return of service is Pro Se.
- A return of service is almost always in paper format and will need to be scanned. It is the responsibility of the filing party to maintain the original paper version at least until the conclusion of any appeal or expiration of the time for filing an appeal. The original paper version must be made available for inspection at the request of the Court or any other party.
- If you are filing a return for a party who was served with a 21-day summons, choose "[summons returned executed](#)" event from the list of available events. If you are filing a return for a party who was served with a 60-day summons, choose "[summons returned executed as to USA](#)" event from the list of available events.

Waiver of Service of Summons

When an executed Waiver of Service of Summons is docketed, the filing party must enter the date the waiver was mailed, which will prompt CM/ECF to automatically generate the answer due date, which is 60 days from the date the notice was mailed.

The following variations to the basic steps of electronic filing will occur when you file a Request for Waiver of Service or Waiver of Service Executed.

- A Request for Waiver of Service should be filed when you request a waiver of service of summons. This event will notify the court that you have requested a waiver and will not be requesting that summons be issued.
- A Waiver of Service Executed is used to set the proper 60-day response due deadline even when the responding party is a non-governmental entity or individual.

Motions

Pursuant to **Local Rule 7.3** all motions, unless made during a hearing or at trial, shall be in writing and shall be accompanied by a brief except as provided in section (j) of this rule. Each motion shall be set out in a separate pleading. To file a motion, follow the general filing instructions in **Section 8**.

Motion for Leave to Amend

When filing a motion for leave to file an amended pleading, the proposed amended pleading shall be electronically filed as an attachment to the motion for leave. If the motion is granted, you should then file the amended pleading in the CM/ECF system, unless otherwise instructed by the court.

See Local Rule 15.1.

Motions for Psychiatric and Psychological Exams

Motions for psychiatric and psychological exams shall be filed under the “SEALED Motion for Exam Report and Treatment” event.

Motion to Compel Discovery

Motions that relate to discovery, use the event “[Compel Discovery](#).” Pursuant to Local Rules 7.3(f) and (h) and 37.1(c), the time for filing related to discovery is 14 days for a response deadline and 7 days for a reply deadline. In all other instances, the event “Compel” should be used, which sets a response deadline of 21 days.

The Court will not consider motions and objections relating to discovery unless moving counsel files a certificate that after personal consultation and diligent attempts to resolve differences the parties are unable to reach an accord.

See Local Rule 37.1.

Notice of Special Appearance

Attorneys not admitted to practice in the Middle District of North Carolina, use the CM/ECF event: [Notice of Special Appearance](#). There is a fee associated with this filing.
See Local Civil Rule 83.1(d).

Attorneys admitted to practice in the Middle District of North Carolina and federal government attorneys should continue to use the CM/ECF event: [Notice of Attorney Appearance](#).

Orders

1. **Entry** - Electronic filing by the Court regarding any orders, decrees, judgments or proceedings of the court shall constitute entry on the docket. Pursuant **to the Federal Rules of Civil Procedure** a Notice of Electronic Filing will be generated and sent to each registered user listed as a party in the case.
2. **Signatures** - Any order filed electronically without the original signature of a judge has the same force and effect as if the judge had affixed his or her signature to a paper copy of the order and it had been entered on the docket in a conventional manner.
3. **Electronic Text (Paperless) Orders** - At his or her discretion, a judge may rule upon a motion by having a text only entry made on the docket. There will be no PDF document attached to the entry. CM/ECF will generate a notice of electronic filing. These orders have the same force and effect as any other type of order.

Proposed Orders

Proposed orders along with a motion;

- the proposed order should be uploaded as an attachment to the motion in PDF format, and;
- the proposed order should be emailed to the assigned District Judge or Magistrate Judge in a Word compatible format.

Please see the Electronic Case Filing Administrative Policies and Procedures Manual ([Section L: Orders and Judgments](#)) for details and a list of emails for each judge.

Registration of Foreign Judgment

- Foreign Judgment are opened as Miscellaneous Cases (MC) in this Court. Filing Users cannot open these cases electronically.
- An **AO Form 451**, copy of the certified judgment, and a check with the applicable miscellaneous filing fee should be mailed or brought to the Clerk's Office for the case to be opened.

Responses and Replies

To file a response to a motion or a reply to a response, follow the general filing instructions in filing documents choosing [Responses and Replies](#) from the main civil menu.

After you select your document, the system will show a list of all pending motions and prompt you to check which motion(s) your response or reply relates to. Click on the applicable box(es) and continue as you would for filing any document.

Responses to Motions to Compel Discovery and Motions for Protective Order

When applicable, use the CM/ECF events: [Response to Motion for Discovery](#) and [Response to Motion for Protective Order](#), which set a reply deadline of (7) days pursuant to Local Rules 7.3(h) and 37.1(c). Using the generic Response event will result in the incorrect setting of a 14 day reply deadline.

Web Accessible Filers

Several new web accessible civil and criminal events have been created in CM/ECF, which are listed under the Web Accessible heading. These events were created to comply with Section 508 of the Rehabilitation Act and are intended to help a blind user with assistive technology, such as screen reader software, to independently file documents. These events are not as functional as other non-web accessible events due to programming limitations beyond the Court's control.

If you experience any difficulties with the new events or have any questions, please contact the Clerk's Office at 336-332-6030.

SECTION 12 - DOCUMENTS FILED IN ERROR

Information

A document incorrectly filed in a case may result from;

- posting the wrong PDF file to a docket entry;
- selecting the wrong document type from the menu; or
- entering the wrong case number.

The CM/ECF System does not permit a Filing User to change incorrect docket entries or misfiled document(s) after the transaction has been accepted. If you discover an error after completion of a transaction, contact the Clerk's Office, as soon as possible, at 336-332-6000 or the Toll Free Help Desk at 1-800-659-2212. The Filing User will need to provide the case number and docket entry number of the item requiring correction. The Clerk's Office will advise the best course of action to correct the filing error. A notice of deficiency may be docketed for the event.

Error Found During Quality Control Process

The Clerk's Office will review filed documents for compliance with the filing requirements as specified in the Federal Rules of Civil Procedure, the Federal Rules of Criminal Procedure, the Local Rules and the Administrative Policies and Procedures of this Court. The Filing User will be notified of any identified errors requiring corrective action.

SECTION 13 - RESOURCES

Information

The court has many resources to assist you with Electronic Filing.

- User Manual
- Electronic Case Filing Administrative Policies and Procedures Manual
- Tutorials
- Training Database - Practice entering documents into CM/ECF using a “training” database that is similar to the official live CM/ECF database
- Sealed Document Guidance
- Local Rules
- Official Federal and Local Forms

PACER accounts may be shared by multiple individuals. In contrast, each CM/ECF registered user is required to have his or her own individual account, login, and password.

Troubleshooting

Cannot View Document Using Link in E-mail Notification

CM/ECF Prompts to Enter PACER Login and Password.

Each e-mail notification that a document has been filed electronically contains a link to the document which you may use one time to view, download and/or print the document without being charged. When you click on the link you are prompted to enter your login and password, it means that according to the system you have already had your one time “free look”. Certain things will make the system act as if you have accessed the document when in fact, you have not. To avoid this problem, do not forward an e-mail notification to another e-mail address, and do not open the e-mail and close it without using the link to view, download or print the document. To help ensure that you do not accidentally miss your free look, which expires 15 days after filing, it is suggested that you add a second e-mail address to your account. Each address will have the opportunity for one free look at the document. [See Your Account under Utilities for instructions on adding additional e-mail addresses.](#)

The CM/ECF System Displays an Error Message when Trying to Upload My Documents.

Occasionally you will try to attach a document, but when you click on Next, you may receive the following messages:

➤ **ERROR: Document is not a well- formed PDF document.**

This means the system is not recognizing your document as a PDF. First, check to make sure that you did not accidentally attach a document in another format. Second, try going back to your word processing version of the document, convert it again, save with a new name and try filing the document again.

➤ **ERROR: You cannot load this file because it is over 50 MB.**

This means the document you uploaded exceeds the 50 MB size limit. Try reducing the size of your PDF. If all else fails, attach what you can to the entry and remain under the 50 MB size limit. Then use the event Civil > Other Documents > Additional Attachments to Main Document to file the rest of the documents. There will be a chance to link this entry to the previous entry when docketing this event.

Note: The 50 MB size limit is for the total size of all the documents being filed, not per document.

Spreading Docket Text

If a case has an associated case the CM/ECF system will give you the ability to spread the docket text to those associated cases when filing a document. The Filing User has the option to say “Yes” or “NO.” The Filing User can select a case, multiple cases or all the associated cases.

How to Add/Create a New Party Filer

- The Search for Party Screen Displays: Enter in **ALL CAPS** the party's First and Last name and click "Search". If the party is a business, enter full name, in **ALL CAPS**, with correct punctuation in "Last/Business Name" field and click [Search].

The CM/ECF system stores names from other cases. The court wants you to search for the name of the party in our CM/ECF system while opening a case. The party you are searching for, if a popular name, may already be in CM/ECF system. Therefore, creating a new party is not required. See the table below for instructions.

If party search results...	Then...
<p>Finds an exact match</p>	<ul style="list-style-type: none"> ➤ Highlight the name. ➤ Click [Select Party]. ➤ Proceed to next step.
<p>No matches or not exact match</p>	<ul style="list-style-type: none"> ➤ Click [Create New Party]. ➤ Proceed to next step.

- The Party Information Screen Displays: See table below, the “Role” field is the most important field to populate. Select either Plaintiff or Defendant from the “Role” drop-down list. Click [Add Party] when finished.

The screenshot shows a web form titled "Party Information" with a sub-header "FIELDS". The form contains the following fields and controls:

- Title: Text input field.
- Role: Drop-down menu with "Plaintiff (default)" selected.
- Pro se: Drop-down menu with "No" selected.
- Prisoner id: Text input field.
- Unit: Text input field.
- Office: Text input field.
- Address 1: Text input field.
- Address 2: Text input field.
- Address 3: Text input field.
- City: Text input field.
- State: Text input field.
- Zip: Text input field.
- Country: Text input field.
- Prison: Drop-down menu.
- Phone: Text input field.
- Fax: Text input field.
- E-mail: Text input field.
- Party test: Text input field.
- Start date: Text input field with "10/26/2017" entered.
- End date: Text input field.
- Corporation: Drop-down menu with "No" selected.
- Notice: Drop-down menu with "Yes" selected.
- Buttons: "Add Party" (green) and "Start a New Search" (blue).




Title	Add Doctor or Dr., Officer. Mrs., Mr. etc.
Role	Select the party’s role from the drop-down list.
Pro Se	Leave at default.
Prisoner Id	Unless otherwise directed in this manual, always leave the prisoner Id field blank.
Unit	Leave blank, unless applicable for a prisoner case.
Office Address 1-3 City State Zip Country Prison Phone Fax E-mail	Leave these fields blank UNLESS the party is a pro se. If the party is pro se, enter their mailing address information in the applicable fields for mailing purposes.

Party text	Enter party text, if applicable. <i><u>Note:</u> Party text is descriptive information about the party, (e.g. In his official capacity, Commissioner of Social Security etc.) and will be found in the caption of the initiating document. <u>DO NOT</u> enter alias information.</i>
Start date	Leave blank.
End Date	Leave blank.
Corporation	If the party is a corporation, select “yes.” If the party is an individual, select “no.”
Notice	Leave at the “yes” default.



Note: Click the [Expand All](#) hyperlink located at the top of the side panel window to view each party you have added thus far.

Note: If applicable, once the names have been added to the left-hand side of the screen you are then able to click on the “Alias...” icon, located under the party name, to enter an alias for the party.

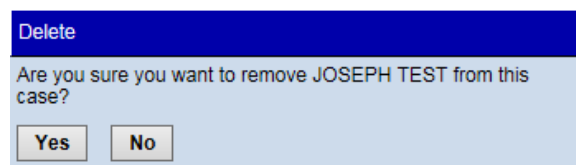
Icon	Action
	You can remove a party, an alias, or a corporate parent/affiliate
	You can make edits to a party’s name, alias, or corporate parent/affiliate
	Add an Alias or Add a corporate parent or affiliate

- Do not add a “Corporate Parent or Other Affiliate.” *If disclosures of Corporate Affiliations are going to be filed, it will be at the same time of filing the disclosure that the corporate parent/affiliate will be added.*
- CM/ECF automatically adds you as an attorney filer once you file your initiating document.

Note: *If you are filing a complaint or a petition for removal, all additional attorneys who may have signed that initiating document, must electronically file his/her own Notice of Appearance a Notice of Special Appearance (if you are not admitted to practice in this district) pursuant to Local Civil Rule 83.1(d) **after** the lead event has been docketed. The attorney who filed the complaint or petition for removal will automatically be added to the case and will not need to file a separate Notice of Appearance.*

Note: *If you are filing a petition for removal, the Clerk’s Office will add all plaintiff attorneys of record.*

Note: *If you make an edit or delete a name from the list, you will be asked if you are sure you want to make this change.*



If you click [Yes], the following screen will display.

The changes you made have been temporarily stored for processing. If you need to make more changes, use the case participant tree to navigate. You must click **Update Case** or **Create Case** to save the changes to the case.

- **Search for the Next Party Screen Displays:** Repeat steps 5-7, until all parties (plaintiffs and defendants) have been added. You may have to click [Add New Party] in the left-hand corner of the screen to get back to the party search screen.

SECTION 14 - HELP DESK

Information

The initial point of contact for any Filing User having trouble filing a document electronically should be the CM/ECF Help Desk. Contact the Court's Help Desk between the hours of 8:00 a.m. and 5:00 p.m., Monday through Friday, if you need assistance using the CM/ECF system.

Help Desk	Phone Numbers
Toll Free	1-800-659-2212
Clerk's Office	336-332-6030

A technical failure on a given day is determined if the system is unable to accept filings continuously or intermittently over the course of any period of time greater than one hour after 10:00 a.m. Eastern Time that day. Known system outages will be posted on the Court's web page, if possible.

See Electronic Case Filing Administrative Policies and Procedures Manual, Section P, for further details.