



***Case Management***

***CM / ECF***

***Electronic Case Files***

# User Manual

(Revised June 2013)

United States District Court  
Eastern District of California  
501 I Street Suite 4-200  
Sacramento, Ca 95814

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# Electronic Case Files System

## User Manual

(Revised June 2013)

### Getting Started

#### Introduction

This manual provides instructions on how to use the Electronic Filing System to file documents with the court, or to view and retrieve docket sheets and documents for all cases assigned to this system. Users should have a working knowledge of Netscape or Internet Explorer and Adobe Acrobat.

#### Help Desk

Contact the Court's Help Desk between the hours of 9:00 A.M. and 4:00 P.M. Monday through Friday, if you need assistance using CM/ECF.

**Toll Free Help Desk – Sacramento                      1-866-884-5525**

**Toll Free Help Desk – Fresno                              1-866-884-5444**

**OR E-mail: [caed\\_cmecf\\_helpdesk@caed.uscourts.gov](mailto:caed_cmecf_helpdesk@caed.uscourts.gov)**

#### CM/ECF System Capabilities

The electronic filing system allows registered participants with Internet accounts and Firefox or Internet Explorer software to perform the following functions:

- Electronically file pleadings and documents in a case
- View official docket sheet and documents associated with a case
- View various reports for electronically filed cases

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## Requirements

### Hardware and Software Requirements

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

- PC or Apple Macintosh
- Operating system: Windows XP and 7 or Macintosh (OS 9 or higher)
- Internet Browser: Internet Explorer (version 7x/8x) and Mozilla Firefox (version 3.5/3.6.28)
- PDF converter software, such as Adobe Acrobat (version 5.0 or higher); do not use software that embeds advertisements in the creation of the PDF document
- Word processor, such as WordPerfect or Microsoft Word
- Scanner for imaging documents capable of converting images to OCR PDF format (Image resolution must be between 200-300 dpi)
- E-mail account; set spam software to accept documents from caed.uscourts.gov
- PACER log in and password

### Registering for Access to CM/ECF

Attorneys not yet admitted to practice before the Eastern District of California must submit their petition to practice in paper form. The petition can be found under **Attorney Info** on our website and serves as registration for access to CM/ECF. Send the completed petition and proof of good standing before the California Bar, along with the fee, to one of the following addresses listed below for processing:

U.S. District Court  
Eastern District of California  
Attn: Attorney Registration  
510 I Street, Suite 4-200  
Sacramento, CA 95814

U.S. District Court  
Eastern District of California  
Attn: Attorney Registration  
2500 Tulare Street  
Fresno, CA 93721

Once an account has been established, the Office of the Clerk will send your log in and password to the email address provided in your registration information.

## Logging In to CM/ECF

### CM/ECF and PACER Log In

You may log in to CM/ECF or PACER via our home page at [www.caed.uscourts.gov](http://www.caed.uscourts.gov)



## UNITED STATES DISTRICT COURT Eastern District of California

Chief Judge Morrison C. England Jr.  
Clerk of Court Victoria C. Minor

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NOVEMBER 1, 2012

### Eastern District of California Launches New Website

**LOGIN**

CM/ECF  
 PACER

Login:

Password:

I agree to redaction rules. ?

**Login**  
**Reset**



The Eastern District of California has launched a new Internet Website. The website is intended to be more user friendly and make information more accessible. This site is best viewed with a resolution of 1024x768 (or higher) and supports Microsoft Internet Explorer 8.0+ or Netscape 7.0+, Firefox 4.0+, and Safari 3.2+.

[Read More](#)

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### PACER Registration

The Court issued log in and password logs the user into CM/ECF and allows the user to lodge a new case and/or file documents into an already existing case. The user must have a PACER log in and password to use the Query and Report features in the CM/ECF system and view documents in existing cases. To establish a PACER account, call the PACER Service Center at (800) 676-6856 or register online at <http://pacer.psc.uscourts.gov>

### Reset Log In and Password

To reset a log in and password that is lost or no longer working, click on **CM/ECF E-Filing** and select **CM/ECF Attorney Registration**. Fill in the required fields on the application and submit by clicking and accepting the rules and guidelines at the bottom of the application. A new log in and password will be provided within 48 hours.

### Maintaining User Account

Users are required to update and maintain their user accounts including contact information, and may do so by logging into the CM/ECF filing system. Once logged in, access the user account by going to the Utilities screen and clicking on **Maintain Your Account**.

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## Selecting CM/ECF Features

### Menu Options



The CM/ECF Main Menu displays a blue task bar at the top of the page. The following features are accessible by simply clicking on the hyperlinked options on the blue bar.

<b><u>Civil</u></b>	Select <b><u>Civil</u></b> to electronically file all civil case pleadings, motions and other court documents.
<b><u>Criminal</u></b>	Select <b><u>Criminal</u></b> to electronically file all criminal case pleadings, motions and other court documents.
<b><u>Query</u></b>	Query CM/ECF by specific case number, party name, or nature of suit to retrieve documents that are relevant to the case. You must log in to <b>PACER</b> before you can query CM/ECF.
<b><u>Reports</u></b>	Choose <b><u>Reports</u></b> to retrieve docket sheets and cases-filed reports. You must log in to <b>PACER</b> before you can view a CM/ECF report.
<b><u>Utilities</u></b>	View your personal CM/ECF transaction log and maintain personal CM/ECF account information in the <b><u>Utilities</u></b> area of CM/ECF.
<b><u>Search</u></b>	Allows you to search menus and events.
<b><u>Logout</u></b>	Allows you to exit from CM/ECF and prevents further filing with your password until the next time you log in.

### Filing a New Civil Case

Attorneys shall file new civil cases electronically using CM/ECF. Follow the steps below to create a temporary file with the case type of “**at.**” Once the case is created, the attorney will file the initial pleading and include the Civil Cover Sheet as an attachment to the complaint. **It is not necessary to file a Summons.** The Clerk’s office will automatically issue an electronic Summons that will be emailed to you along with your permanent civil case number. Please note that the case is not considered filed until all required documents have been filed and payment is received. The filed date will be the date that all components are completed.

Begin the process by selecting Civil from the blue task bar at the top of the CM/ECF screen. This will take you to the main Civil Events menu.

Follow these basic steps to file a new case:

1. Click on Lodge New Case
2. Enter the case initiation information from the Civil Cover Sheet

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3. Search and add/create all parties in the case
  4. Receive confirmation of attorney temporary (at) case assignment
  5. Use the Docket Lead Event link to file Complaint or Notice of Removal
  6. Select the filer and parties to whom the Complaint is against
  7. Create the attorney/party association
  8. Browse to select the PDF file for the Complaint
  9. Attach the Civil Cover Sheet by browsing to select the PDF
  10. Review final docket text for accuracy and submit the transaction
  11. Receive the Notice of Electronic Filing (NEF)
  12. Return to the Civil Menu to file additional supporting documents and/or pay the filing fee

### **Adding Parties**

Please do NOT add party names in all caps. All party names should be added in mixed case text.

When adding parties to a new case, CM/ECF allows you to search the system for already existing parties. Enter name to retrieve a list of already existing parties. A list will not appear if there are no matches, and you may create a new party. To view all associated information for an existing party, double click on the name. Select the matching party only if there is no associated address information. If the already existing party includes address information, create a new party for your case. No address information should be included for any parties added to your new case. **When filing a Notice of Removal, all parties must be added exactly as listed on the original State Court Complaint.**

### **Filing Documents**

Once you have completed the initial steps to open your case, a link will be provided to Docket Lead Event. Click on this link to go directly to a list of initiating documents. Choose the appropriate document and the system will prompt you through the screens to browse out and attach your PDF file. You may add supporting documents such as a Memorandum or Declaration by browsing out again. Each time you add an attachment, the system will automatically add another line to add more documents if necessary. Add the Civil Cover Sheet as an attachment. Each attachment must be named, either by using the drop down menu provided, or by typing a description in the blank field provided. Use only one of these options to avoid excess text on the docket. Once you have added all of your attachments, click next and the system will prompt you through the remaining screens. You will be provided a text box to add any pertinent information to the docket. Please do NOT use all caps.

### **E-Mail Notification of Electronic Filings**

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**. The filer is permitted one free look at the document *and* the Docket Sheet to verify that the pleading was properly docketed. 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.

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## Civil and Criminal Events

### Filing Documents for Existing Cases

There are nine basic steps involved in filing a document:

1. Select the type of document to file (see Attorney Event Menu)
2. Enter the case number in which the document is to be filed
3. Designate the party that the filing relates to
4. Verify that the case number and caption are correct
5. Designate the party or parties filing the document
6. Attach PDF file by browsing out to the location of the saved file
7. Add attachments, if any
8. Modify docket text as necessary
9. Submit the pleading to CM/ECF and receive Notice of Electronic Filing

<p><b>Note:</b> It is the responsibility of filers to send hard copies of the pleading and <b>Notice of Electronic Filing</b> to attorneys and pro se parties who have indicated they <i>do not</i> have E-mail accounts.</p>
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### Correcting a Mistake

Use the [Back] button on your Internet browser toolbar to go back and correct an entry made on a previous screen. Corrections can only be made before the transaction is submitted to the Court. A warning on the last screen will remind you to review your transaction before submitting.

To abort the transaction you may click on any of the options in the blue CM/ECF menu bar.

### Documents Filed In Error

A document incorrectly filed in a case may result from one of the following:

- a) posting the wrong PDF file to a docket entry;
- b) selecting the wrong document type from the menu; or
- c) entering the wrong case number and not discovering the error before completing the transaction.

To request a correction, please call one of the following numbers as soon as possible.

**Toll Free Help Desk—Sacramento                    1-866-884-5525**

**Toll Free Help Desk—Fresno                        1-866-884-5444**

You will need to provide the case and document numbers for the document requiring correction. If appropriate, the court will make an entry indicating that the document was filed in error. You will be advised if you need to re-file the document. The CM/ECF system does not permit you to change the misfiled document(s) or incorrect docket entry after the transaction has been accepted.



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## **Filing Sealed Documents**

Please refer to Local Rule 141(a) through 141(e) for detailed information on filing sealed documents in the Eastern District. Go to [www.caed.uscourts.gov](http://www.caed.uscourts.gov) and click on the **CM/ECF E-Filing** link, then select **Submission of Sealed Documents**.