# Public Access to Court Electronic Records



# PACER User Manual for CM/ECF Courts

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## **Quick Start**

- 1. To create a PACER account, go to pacer.uscourts.gov and click **Register for an Account**.
- 2. To search for a case, go to pacer.uscourts.gov and click Log in to at the top right.
  - a. If you know the location of the case, click **PACER Log In**. Select the court from the **Where would you like to go** dropdown list. Once logged in, click **Query** on the top left. For a business, enter the company name in the **Last Name** field.
  - b. If you do not know the location of a case, click **PACER Case Locator** to search a broad range of courts.
- 3. If you access a **Docket Report** and do not see a link for the docket entry number or an icon next to the docket entry, you must order the documents from the court clerk's office.

**NOTE:** To receive PACER announcements by email, go to the Email Updates section in the bottom right corner of pacer.uscourts.gov.

# **Overview**

This manual provides a detailed description of PACER and CM/ECF, and how they both work. CM/ECF allows all appellate, district, and bankruptcy courts to accept filings and provides access to filed documents.

#### **PACER Features and Benefits**

- Twenty-four-hour access to case file documents
- Ability to download and print court documents remotely
- Simultaneous access to case files by multiple parties
- Expanded search and reporting capabilities

#### **CM/ECF** Features and Benefits

- Ability to file documents/pleadings electronically with the court
- Automatic email notices of case activity for parties in a case
- No delays or added expenses associated with mail or courier services
- Instant access that allows easier case tracking
- Less physical storage space and document-processing times
- Secure and reliable
- Immediately updated and available court dockets

# **PACER Policies and Procedures**

You can find a description of PACER's policies and procedures here: https://pacer.uscourts.gov/policy-procedures. If you have questions, contact the PACER Service Center (PSC) at (800) 676-6856 or <a href="mailto:pacer@psc.uscourts.gov">pacer@psc.uscourts.gov</a>.

Significant changes to policies and procedures will be posted on the PACER website. You should check regularly for changes, as the account holder automatically agrees to them after posting.

#### **Introduction to PACER**

PACER allows users to view, print, or download current and recently closed federal cases. If a document is not available through PACER, you may need to contact the court.

#### **Fees**

The PSC does not receive appropriations from the federal government to provide electronic public access. Instead, Congress directed the Judiciary to fund PACER through user fees. As a result, all registered agencies and individuals are charged \$0.10 per page for PACER searches. This includes searches that yield no matches. In addition, audio files generate a \$2.40 per-file charge.

PACER counts billable pages in three ways:

- 1. For an html-formatted report, a formula determines the number of pages.
- 2. For a PDF, the actual number of pages is counted.
- 3. On the PACER Case Locator (PCL), 54 lines are counted as one billable page.

**NOTE:** If you accrue charges of \$30 or less in a quarter, fees are waived.

For printed report data from CM/ECF, the print job will not always match the number of pages billed, as settings may vary. All users are charged equally for the same information, regardless of settings or printer configurations.

The per-page charge applies whether pages are printed, viewed, or downloaded. The charge for any single document is capped at \$3, or 30 pages. In CM/ECF, most reports obtained through the Reports menu are not case-specific and are not capped at 30 pages.

**NOTE:** The 30-page cap does not apply to transcripts of federal court proceedings, new case reports, or other non-case-specific reports or searches.

Each court site provides a transaction receipt and options to review billing history. To review transactions from all courts, log in to <u>Manage My Account</u> at pacer.uscourts.gov and click **View Detailed Transactions** under the Usage tab.

#### Dockets, Case Reports, and Search Results

Docket reports are generated with the number of pages for a docket sheet before the document is reformatted as a webpage.

A formula calculates billable pages for docket reports, case reports, and search results based on the number of bytes extracted (4,320 bytes = 1 billable page).

**NOTE:** Docket reports are capped at 30 pages, but case reports are not capped at 30 pages.

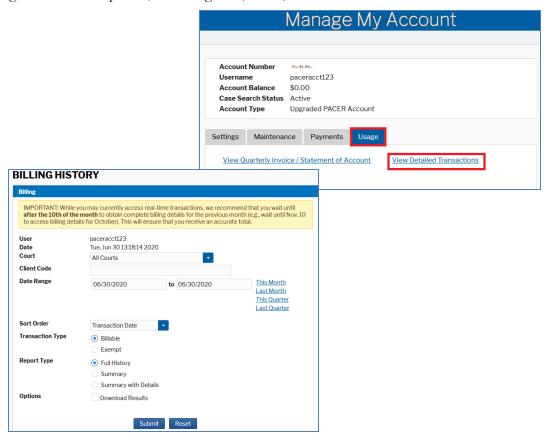
#### **Images**

PACER websites offer images of documents filed. Images are billed according to the number of pages in a PDF (1 PDF page = 1 billable page).

# Usage and Billing

To review PACER usage and billing history on your account:

- 1) Go to pacer.uscourts.gov and log in to **Manage My Account**.
- 2) Click the **Usage** tab and select the **View Detailed Transactions** option. You may search using a number of options, including date, court, and client code.



The PSC bills quarterly and sends a statement by mail or a notice of billing by email, depending on your account preference. Fees are waived when usage is \$30 or less for the quarter. If you use a client code to track client-specific charges, it will appear in the detailed transaction history. The client code will not appear unless it is entered during the transaction.

Online payments can be made at pacer.uscourts.gov (under Manage My Account), or by calling the PSC at (800) 676-6856 and using VISA, MasterCard, Discover, or American Express.

If you pay by check, please include your account number to ensure payment is posted to the correct account. Send checks to:

U.S. Courts: PACER P.O. Box 5208

Portland, OR 97208-5208

#### **Billing Errors**

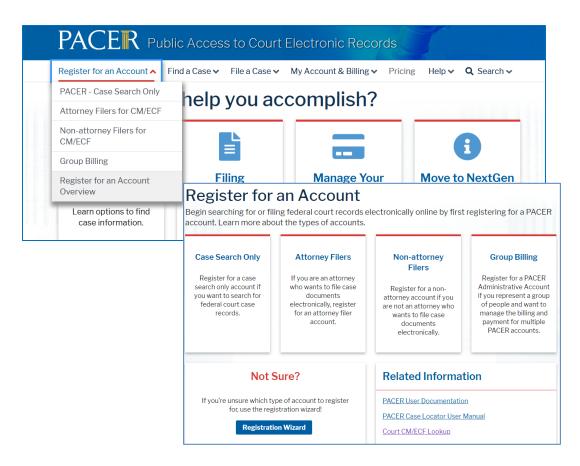
If you think there is a billing error, you must submit a <u>Credit Request Form</u>. You may also fax the form to the PSC at **(210) 301-6441**. Never include your password with any correspondence. A PSC representative will contact you during the review process.

# **PACER Registration**

The PACER website allows users to register for PACER, follow links to courts' CM/ECF systems, and review frequently asked questions (FAQs).

## Register

To choose which type of PACER account you need, select the **Register for an Account Overview** option under Register for an Account.



If you are not sure which type of account you need, click **Registration Wizard**. This tool will help you decide which registration option is best for you.

Use the Register for an Account page to select which registration you want.

- 1) **Case Search Only:** This PACER search-only account provides read-only access for viewing, searching, and printing federal appellate, bankruptcy, and district court documents.
- 2) **Attorney Filers:** Attorneys may register to file electronically (e-file) in a next generation (NextGen) CM/ECF court.
- 3) Non-attorney Filers: Non-attorneys may register to file e-file in a NextGen court.
- 4) **Group Billing:** A PACER Administrative Account (PAA) allows groups or firms to manage multiple PACER accounts for billing purposes.

**NOTE:** There is no registration fee.

# **Case Search Only**

This is the most commonly selected option. From the Case Search Only link, click **Register for a PACER Account**.

- If you provide a credit card while registering, case search capability is activated upon successful validation of the card and review of the account.
- If you do not provide a credit card, an authentication token will be sent by U.S. mail within 7–10 business days to the address on the registration.
- If you register from outside the United States, type 5 zeroes in the Zip Code field.

#### **Attorney Filers**

The Federal Judiciary has implemented a nationwide centralized attorney admissions and e-filing registration process in all appellate, district, and bankruptcy courts. The following information outlines the registration process.



**Determine whether the court uses the legacy or upgraded CM/ECF system**. If your court uses the next generation Case Management/Electronic Case Files (NextGen CM/ECF) system, you may register to e-file through the PACER website. If the court uses a legacy system, you will need to contact each district/bankruptcy court individually to register.

**Submit admissions/e-file registration on pacer.uscourts.gov**. If you have an upgraded PACER account, log in to <u>Manage My Account</u> and select the Attorney Admissions/E-File Registration option under Maintenance. Requirements vary from court to court, but the information you update through <u>Manage My Account</u> is sent electronically to each court in which you are admitted or registered.

Apply for admissions/e-file registration in each court individually. To e-file, you may need to be admitted to practice in the court. Once you complete a registration in one court, you may apply for admissions and/or register to e-file in another court. The same username and password will allow nationwide search access and e-file access in the NextGen courts in which you are admitted and/or registered as an e-filer.

**PSC** forwards the registration to the court. When your request is complete, the PSC will send it to the court for verification and processing. Document filing and access to restricted cases/documents is not permitted until that court processes the request.

Wait for reply from court on whether the registration has been accepted. Processing time for

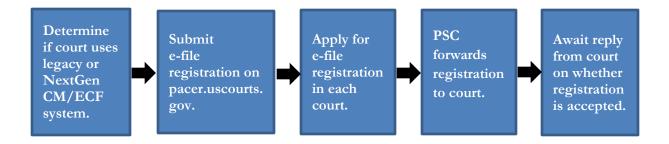
attorney admissions and/or e-file registration can vary from court to court. Once your request is processed, you will receive an email notification of the court's determination. For additional information regarding attorney admissions and e-file procedures, use our <a href="Mailto:CM/ECF Courts Lookup">CM/ECF Courts Lookup</a> to locate your court. Contact the Clerk's Office if you need immediate access to file documents.

#### **Non-Attorney Filers**

This path is specifically for non-attorneys, i.e., *pro se* filers, court reporters, interested parties, filing agents, creditors, trustees, U.S. Trustees, and other parties who are not attorneys. **NOTE:** Not all courts accept non-attorney filers, and some accept only specific types of non-attorney filers.

If the selected court does not allow a specific type of non-attorney filer, you will not be able to register for filing privileges at that court. The following information outlines the registration process.

The Federal Judiciary is implementing a nationwide centralized non-attorney e-filing registration process in all appellate, district, and bankruptcy courts over the next several years.



**Determine whether the court uses legacy or upgraded CM/ECF system.** If the court in which you want to practice uses the next generation Case Management/Electronic Case Files (NextGen CM/ECF) system, you may register to e-file through this site. If the court uses a legacy system, you must contact each district/bankruptcy court individually to register.

**Submit e-file registration on pacer.uscourts.gov**. If you have an upgraded PACER account, log in to <u>Manage My Account</u> and select the Non-Attorney E-File Registration option under Maintenance. E-file registration. Requirements vary from court to court, but the information you update through <u>Manage My Account</u> is sent electronically to each court in which you are registered.

Apply for e-file registration in each court individually. Once you complete a registration in one court, you may register to e-file in another court. The same username and password will allow nationwide search access and e-file access in the NextGen courts in which you are registered.

**PSC** forwards registration to court. When your request is complete, the PACER Service Center will send it to the court for verification and processing. Document filing and access to restricted cases/documents in a court is not permitted until that court processes the registration request.

Wait for reply from court on whether the registration has been accepted. Processing time for

e-file registration can vary from court to court. Once your request is processed, you will receive an email notification of the court's determination.

For additional information on non-attorney e-file procedures, use our <u>CM/ECF Courts Lookup</u> to locate your court. Contact the Clerk's Office if immediate access to file documents is needed.

## Appellate Court E-File Registration

The next generation (NextGen) CM/ECF system functionality allows you to use the same account for both PACER and electronic filing access. All appellate courts have now converted to NextGen CM/ECF.

If you have a legacy PACER account, you must complete a separate e-file registration to request filing privileges via this website. You will not have to register at each court's website separately; however, you must request e-filing privileges from each court in which you want to file.

# District and Bankruptcy Court E-File Registration

Registration for district and bankruptcy e-filing is separate from and in addition to PACER registration. PACER allows you to view docket reports and documents from a court's database, while e-file registration allows you to e-file.

When you register for a filer account, you must already have a PACER account. Each district and bankruptcy court handles filer registrations individually. To register for filing privileges in one of these courts, you must contact that court directly.

# Manage My Account

When you click Manage My Account and log in, the screen below should appear. The following sections discuss each tab and the links on this page.



#### Settings tab

- Change Username
- <u>Change Password</u>: Passwords must be at least 8 characters, which can contain letters, numbers, and special characters such as underscores, periods, and exclamation points. Password changes are immediate.
- <u>Set Security Information</u>: Setting up security questions allows you to reset your forgotten password. You will be prompted to answer the questions on file to reset your password.
- <u>Update PACER Billing Email</u>: Enter the email address where you want to receive billing notices.
- <u>Set PACER Billing Preferences</u>: Set account preferences for use in CM/ECF. This allows you to turn off viewing of transaction receipts and require the use of a client code.

#### Maintenance tab

- Update Personal Information
- Update Address Information
- <u>Check E-File Status</u>: Select a court and court type to check your e-file status. This option will only appear if you have submitted an e-file registration at a court.
- <u>Display Registered Courts</u>: See a list of courts in which you are an accepted e-filer. This option will only appear if you are an accepted e-filer in at least one court.
- <u>Attorney Admissions/E-File Registration</u>: Apply to e-file at a participating court.
- <u>Non-Attorney E-File Registration</u>: Non-attorneys (i.e., *pro se* filers, court reports, interested parties, or filing agents) may register for e-file privileges at a participating court.
- <u>Update E-Filer Email Noticing and Frequency</u>: Update the email address, delivery method, and formatting options at participating courts for which you are an accepted e-filer.
- <u>E-File Registration/Maintenance History</u>: View a list of all your admissions and e-file registration and maintenance requests. This option will only appear if you have submitted an e-file registration at a court.

#### Payments tab

- Make One-Time PACER Fee Payment: Pay PACER account balance or another amount.
- <u>Manage My Stored Payment Information</u>: Store a credit card as a default payment method for filing and attorney admissions fees, or for automatic billing for PACER fees.

NOTE: You will **NOT** see the Payments tab if your account is not yet activated.

#### Usage tab

- View Quarterly Invoice/Statement of Account
- View Detailed Transactions: View details about your searches and PACER fees.

#### **PACER Administrative Account**

The PACER Administrative Account (PAA) is a consolidated billing and online account management process for groups such as law firms, financial organizations, and educational or research institutions.

The PAA User Manual provides extensive details on how to register for a PAA, add and delete accounts, and more. It is <u>here</u>.

# **PACER Case Locator**

The PACER Case Locator (PCL) is a national index for district, bankruptcy, and appellate courts. You can reach the PCL (<a href="https://pcl.uscourts.gov">https://pcl.uscourts.gov</a>) from the Find a Case dropdown on the PACER website.

The PCL is a search tool for PACER, and you may conduct nationwide searches to determine whether a party is involved in federal litigation. Each night, subsets of data are collected from the courts and transferred to the PCL.

The PCL User Manual provides detailed information on how to navigate the PCL and use its features. It is located on the PACER website <u>here</u>.

#### CM/ECF and PACER

The Case Management/Electronic Case Files (CM/ECF) system allows courts to accept electronically filed documents and provides access to filed documents online.

The next generation (NextGen) CM/ECF system functionality allows you to use the same account for both PACER and electronic filing access. Check the CM/ECF Courts Lookup page to see if your court has upgraded to NextGen.

#### **General Information**

The PACER system is available 24 hours a day, seven days a week, including weekends and holidays. PACER account specialists are available to assist you at (800) 676-6856 between 8 a.m. and 6 p.m. CST Monday through Friday, or by email at <a href="mailto:pacer@psc.uscourts.gov">pacer@psc.uscourts.gov</a>.

#### Security

The PACER login screen uses software that encrypts and protects your information. If you leave a PACER page for an unsecured webpage, you may see a notice stating that you are moving to an unsecured document. You may disregard this message.

#### **Information Updates**

All CM/ECF systems are updated instantly once the update is complete. This provides real-time access to information entered into the court's database. If you have questions about the information provided by the court, contact the court directly.

## Saving and Printing a File

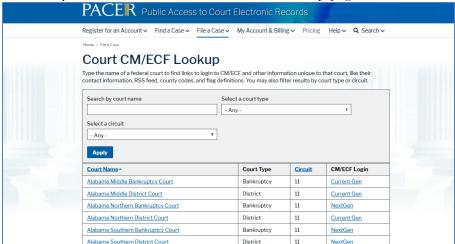
To save a file, click File on the top menu and select **Save As**, or select **Edit** on the browser menu to copy and paste the information to a desired location. You can save the file as HTML, plain text, or PDF. For the latter, you will need a PDF writer.

To print, click **File** on the top menu and select **Print**. If there is a frame at the top of the screen (in Query, case information is separated from the rest of the screen by a line called a frame), click on the lower half of the screen before clicking Print. If there is no frame, click in the body of the document before clicking Print.

**NOTE:** If the **Save As** or **Print** option is not available, the document is opening within the browser. Contact the PSC for assistance at (800) 676-6856 between 8 a.m. and 6 p.m. CST Monday through Friday, or by email at pacer@psc.uscourts.gov.

# Logging In to CM/ECF

1. Find the court you need on the <u>CM/ECF Courts Lookup page</u>.



Most courts are available here: <a href="http://ecf.court\*.uscourts.gov">http://ecf.court\*.uscourts.gov</a>.

**NOTE:** The "\*" in the court address should be the state, abbreviation of the district (if applicable), and the first letter of the type of court (e.g., Texas Northern Bankruptcy would be http://ecf.txnb.uscourts.gov).

You can also find a case through the PCL. Click a case to go to the court's website.

2. Not every court runs the same version of CM/ECF or formats pages in the same way. In most cases, you should use the court website link that includes the "Document Filing System" option or something similar to the "View/Print" option in the screen shot below.





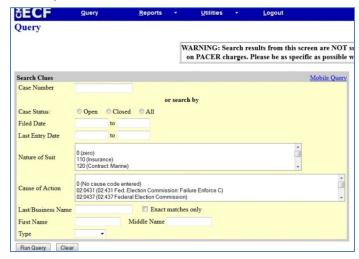
3. If you have not already logged in at a court, enter your PACER username and password.

After logging in, you can go to any other court's CM/ECF system without logging in again.

# U.S. District Courts (Civil or Criminal) for CM/ECF

Your search on the Query screen may produce multiple pages of results. A well-defined search will yield specific results and fewer fees. Use the search tips to see how to use each of the fields efficiently.

- <u>Case Number</u>: Full case numbers for district courts contain a number that looks like this: 1:05-cy-06794.
  - o 1 = the office. If a court has more than one divisional office, there is a code for each division (e.g., 1, 2, 3, 4, etc.).



- o 05 = the year. All cases opened in a given year have the last two digits of the year as the second part of the case number.
- o cv = case type. The case type will be either "cv" for civil or "cr" for criminal.
- o 06794 = case number. If the case type and office number are omitted, all cases that match the year and case number are displayed.
- <u>Case Status</u>: Select a button based on the status of a case.
- Filed Date: Search by date range. All cases are shown in billable pages.
- <u>Last Entry Date</u>: You may search by a date range based on the case activity. All cases with activity during the specified date range are displayed in billable pages.
- Nature of Suit: This area provides a drop-down menu selection screen with common Nature of Suit codes and a brief explanation of each. To view a list of all these codes, go to the following link on the PACER website:
  - https://www.uscourts.gov/sites/default/files/js\_044\_code\_descriptions.pdf <u>Last Name</u>: Enter at least two letters to search by party name. This field may also be used to enter a company name search.
- First Name: This field is not required. Enter an initial or full first name to narrow the results.
- <u>Middle Name</u>: This field is not required and is not case sensitive. Enter an initial or full middle name to narrow the results. Enter a name in any combination of uppercase and lowercase letters and the search will extract all names that have any matching combination.
- <u>Type</u>: This is not a required field. The role for the party name may be selected. The drop-down list may vary from court to court. Enter at least three letters of the last name or company name to search for a specific type.

**NOTE:** You may use only one search criterion. If there are entries for two or more of the search options, the latter is used. For example, if you enter a case number and last name, the case number is not used in the search.

# Query Menu

Click **Run Query** to see search results. You will see a list of names or cases. Select from this list, or click the back button to enter more data or to run another search.

Click the scroll bar on the right to view additional results. When you select a case, a new screen selection menu will appear with a header that looks like this:

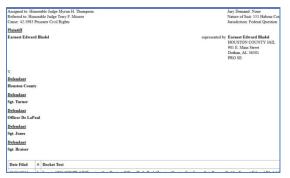
3:00-cv-01686-M Frosty Bites Distrib, et al v. Dippin Dots, Inc, et al Barbara M.G. Lynn, presiding Date filed: 08/03/2000 Date terminated: 11/30/2000 Date of last filing: 01/02/2001

You should also see the Query option menu, which provides a variety of information pertaining to the person or case. Click each option to find any additional information you may need.





The **Deadlines/Hearings** link displays the pending deadlines/hearings for the case. The "silver bullet" next to deadline/hearing results show docket text for this entry.



**Docket Report:** The typical docket report contains information from the civil or criminal cover sheet submitted by the plaintiff for each complaint filed.

This report also includes an option to view or print multiple documents. After retrieving the docket report, you may place a checkmark next to the document(s) you wish to view.

**NOTE:** The maximum download size is 10MB. Exceeding this amount will cause an error message.

# Reports Menu Options

Clicking Reports on the CM/ECF menu takes you to the reports page, where you will see the following screen and options.



The **Docket Activity** option lists the docket activity for one or more cases within the date range entered. If a specific case number is entered, the maximum fee will not exceed 30 pages (\$3.00). However, omitting the case number will not cap the results.

**NOTE:** Hundreds of new documents are submitted daily to each court; therefore, the results may be substantial.

#### **Utilities Menu**

The options on this menu may vary from court to court.

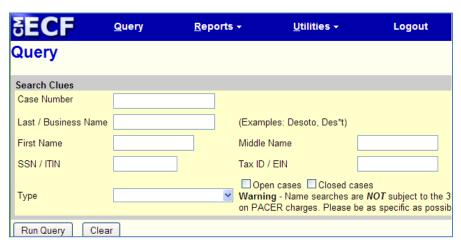


# Logout

Use this option to log out of CM/ECF.

# U.S. Bankruptcy Courts for CM/ECF

Your search on the Query screen may produce multiple pages of results. A well-defined search will yield specific results and fewer fees. Use the search tips on how to use each of the fields efficiently.



- <u>Case Number</u>: Full case numbers for district courts contain a number that looks like this: **1:05-bk-06794**.
  - o 1 = the office: If a court has more than one divisional office, there is a code for each division (e.g., 1, 2, 3, 4, etc.).
  - o 05 = the year: All cases opened in a given year have the last two digits of the year as the second part of the case number.
  - $\circ$  bk = case type
  - o 06794 = case number: If the case type and office number are omitted (e.g., 05-06794), all cases that match the year and case number are displayed.
- <u>Last/Business Name:</u> Enter at least two letters to search by last name or company name.
- First Name: This field is not required. Enter an initial or full first name to narrow the results.
- <u>Middle Name</u>: This field is not required and is not case sensitive. You may enter an initial or full middle name to narrow the results when searching by party name.
- <u>SSN/TIN</u>: You may search by the full Social Security Number (SSN). Use of a wildcard is not permitted. Enter dashses when entering SSNs.
- <u>Type</u>: This is not a required field. The role for the party name may be selected. Enter at least three letters of the last name or company name to search for a specific type.

**NOTE:** You may use only one search criterion. If there are entries for two or more of the search options, the latter is used. For example, if you enter a case number and last name, the case number is not used in the search.

# **Query Menu**

Click Run Query to see search results. You will see a list of people or cases. Select from this list, or click the back button to enter more data or run another search.

Click the scroll bar on the right to view additional results. When you select a case, a new screen selection will appear with a header that looks like this:

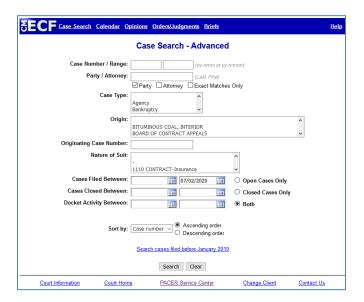
98-47185-dml13 Kennith Joe McGowan and Connie Lynn McGowan
Case type: bk Chapter: 13 Asset: Yes Vol: v Judge: D. Michael Lynn
Date filed: 11/25/1998 Date of last filing: 01/22/2004
Date terminated: 07/29/2003

Alias Trustee
Associated Cases Claims Register
Attorney Creditor Mailing Matrix
Creditor
Deadline/Schedule
Docket Report ...
Filers
History/Documents
Notice of Bankruptcy Case Filing
Party
Related Transactions
Status

The left side of the Query menu displays an alphabetical list of report options—these options may differ depending on the court.

# Appellate Courts CM/ECF

The query screen below shows the options you can use to search for a case in appellate courts.



In this section, you may notice that the nature of suit code (NOS) is 4 digits (e.g., 1110) instead of 3 digits used by bankruptcy and district courts. The additional digit before the NOS is:

- 1 = USA is a plaintiff
- 2 = USA is a defendant
- 3 = Private lawsuit
- 4 = Diversity
- 5 = Local—state issue