

## UNITED STATES DISTRICT COURT WESTERN DISTRICT OF OKLAHOMA

### **ELECTRONIC CASE FILING TRAINING**



## UNITED STATES DISTRICT COURT WESTERN DISTRICT OF OKLAHOMA

#### **CONTACT INFORMATION**

Website: www.okwd.uscourts.gov

Help Desk Phone Number: 405-609-5555

**Help Desk Hours of Operation:** 7:30am-5:00pm M-F

Help Desk Email Address: HelpDesk@okwd.uscourts.gov

New Cases Email Address: NewCases@okwd.uscourts.gov

National PACER Help Desk: 800-676-6856

#### WHERE TO FIND USEFUL INFORMATION

Local Court Rules: www.okwd.uscourts.gov > Rules &

Procedures > Local Rules > Local Court

Rules

**Electronic Filing Manual:** www.okwd.uscourts.gov > Rules &

Procedures > Local Rules

> Policies and Procedures Manual

**Chambers Rules:** www.okwd.uscourts.gov > Rules &

Procedures > Chambers Rules

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#### ACCESSING CM/ECF: LOGGING IN IF YOU ALREADY HAVE FILING RIGHTS

Important: CM/ECF is currently only supported on Firefox.

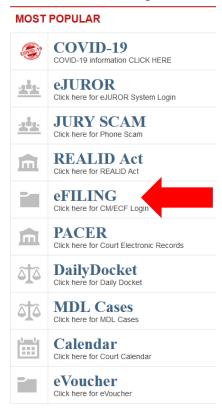


CM/ECF is not supported on Microsoft Edge or Google Chrome. Using these browsers will lead to system errors.



When you have filing rights in the Western District of Oklahoma, you will be able to access it from PACER.gov or from this Court's Website. These instructions will show you how to access it from the Court's website.

- 1. Using Firefox, go to www.okwd.uscourts.gov.
- 2. Scroll to our Most Popular section and click on the eFiling link.



3. Click the Hyperlink under the State of Oklahoma.



Welcome to the U.S. District Court for the Western District of Oklahoma[LIVE]

Western District of Oklahoma[LIVE] - Document Filing System



• This will redirect you to the PACER login screen. Log in using your unique attorney credentials and you will be returned to the CM/ECF filing system.

<b>Description Description Description Description Description Description</b>							
Username *							
Password *							
Client Code							

4. Once you have logged in, you should see this menu at the top of your screen.



There are two reasons why you may not see filing options (the Civil and Criminal tabs) when you log in with your PACER credentials:

- o If you previously had filing rights, but have not filed since prior to August of 2020, you must link your PACER Account with your old CM/ECF Account. (See Pg. 36.)
- If you are admitted to practice, but have never filed before, you must request efiling privileges on PACER. (See Pg. 38.)

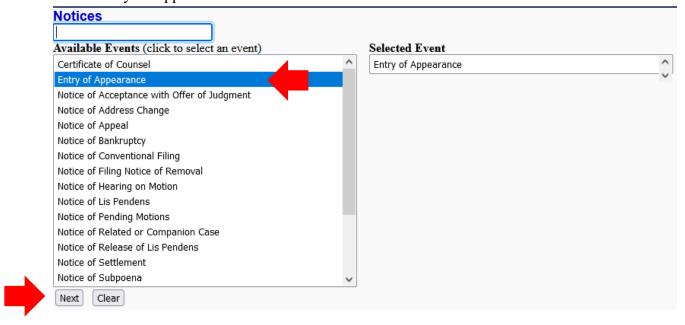
#### HOW TO: FILE AN ENTRY OF APPEARANCE

An Entry of Appearance is the first document an attorney must file in any case. An EOA should be filed in every case in which an attorney intends to file, including cases removed from State Court.

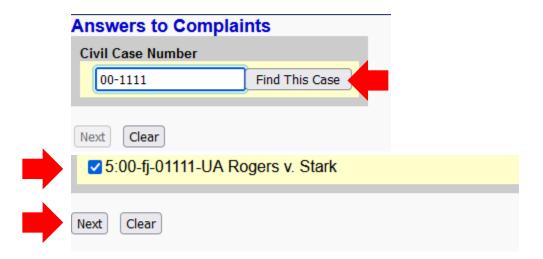
1. Click the appropriate filing tab (Either Civil or Criminal). For the purposes of these instructions, we will use the Civil Menu. Under Other Filings, select Notices.



2. Select Entry of Appearance. Click Next.



3. Enter the case number in simple terms (i.e. 18-5) and click Find This Case. Check the box next to the correct case number and click Next.



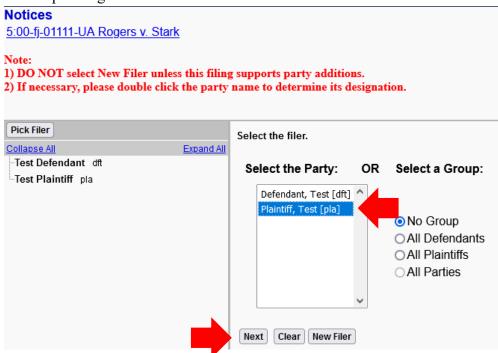
4. Verify the case number is correct and click Next. Do not click on your case number/title at this time, as this will take you to view the docket sheet.

# Notices 5:00-fj-01111-UA Rogers v. Stark Next Clear

5. Upload your EOA as the Main Document using the Browse button. Click Next.



- 6. Select the party you represent.
  - If you represent only one of multiple plaintiffs or defendants, select only the applicable party instead of All Defendants or All Plaintiffs.
  - If you represent more than one party, select the name of the first party, hold down the Ctrl key on your keyboard, and select the names of subsequent parties before pressing the Next button.



7. Ensure Notice is checked so that you will receive notices of electronic filings (NEFS) in this case each time a document is filed. Click Next.

#### Notices

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The following attorney/party associations do not exist for the above case(s).

Please check the box on the left of the screen for associations which should be created.

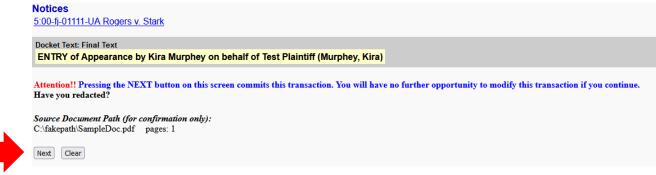
If the association should not be created, be sure the box is unchecked<

✓ Test Plaintiff (pty:pla) represented by Kira Murphey (aty)
✓ Notice
Next

8. Continue clicking Next. You will receive one final warning before finalizing the filing.



9. Review your docket text at this step to ensure everything is accurate. Clicking next will file your document, and you will receive a Notice of Electronic Filing in your email.



#### How To: FILE AN ANSWER TO COMPLAINT

1. Click the Civil filing tab. Under Initial Pleadings and Service, select Answers to Complaints/Disclaimer.



2. Enter the case number in simple terms (i.e. 18-5) and click Find This Case. Check the box next to the correct case number and click Next.



3. Verify the case number is correct and click Next. Do not click on your case number/title at this time, as this will take you to view the docket sheet.



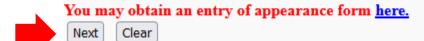
4. If you have not filed an entry of appearance in this case, you must do so prior to filing any other document. If you have already filed an entry of appearance, click Next.

#### **Answers to Complaints**

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#### ENTRY OF APPEARANCE INFORMATION

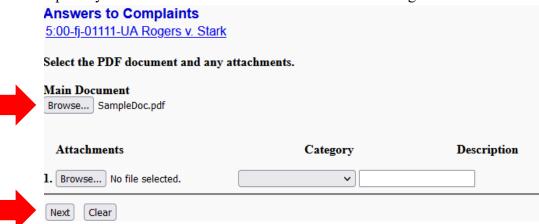
If you have not yet filed an entry of appearance in this case, you need to do so.



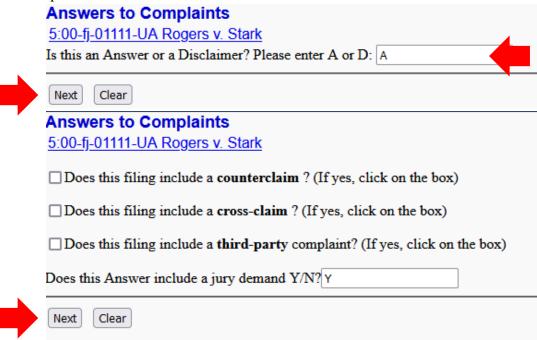
- 5. Select the party you represent.
  - o If you represent only one of multiple plaintiffs or defendants, select only the applicable party instead of All Defendants or All Plaintiffs.
  - o If you represent more than one party, select the name of the first party, hold down the Ctrl key on your keyboard, and select the names of subsequent parties before pressing the Next button.



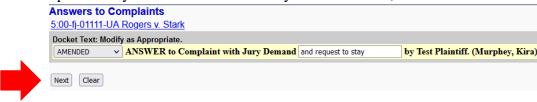
6. Upload your Answer in the Main Document section using the Browse button. Click Next.



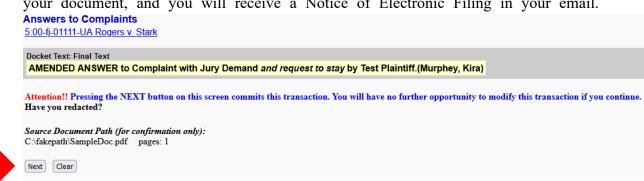
7. CM/ECF will ask you a series of questions. Answer as appropriate, clicking Next after each question.



8. You may adjust the title of your document using this screen. If this is an Amended Answer, you could indicate that information by selecting "AMENDED" from the dropdown options. If you do not need to modify the docket text, click Next.



9. Review your docket text at this step to ensure everything is accurate. Clicking next will file your document, and you will receive a Notice of Electronic Filing in your email.



#### **HOW TO: OPEN A NEW CASE**

The requirements for opening a new civil case can be found in the Local Rules, Section II: Commencement of Action and Service of Process, and the ECF Policies & Procedures Manual Section II.A.2: Initiating Documents in Civil Cases.

New civil cases in this district cannot be filed by the attorney on CM/ECF. Instead, you will email the initiating documents to the New Cases Inbox where they will be reviewed by Court Clerk's Office staff, assigned a case number, and entered into CM/ECF for you.

## NEW CASE DOCUMENTS SHOULD BE EMAILED TO: NEWCASES@OKWD.USCOURTS.GOV

- 1. The following documents are required to open a new case:
  - o Complaint, Petition, or Notice of Removal from State Court.
  - Completed Civil Cover Sheet (Form JS 44, available on <u>www.okwd.uscourts.gov</u> under Forms)
- 2. These other documents may be included in your email to be filed by Court Staff, if appropriate for your case or as required by Federal or Local Rules.
  - o Any exhibits or attachments to your Complaint.
  - o If filing a Notice of Removal, all State Court pleadings and a copy of the State Court Docket Sheet.
  - o Any Motion for Leave to Proceed in forma pauperis.
  - Completed Summons Form (AO-440, available on <u>www.okwd.uscourts.gov</u> under Forms).
- 3. Additional documents for filing (i.e., an attorney entry of appearance) must be filed on CM/ECF after the case is opened.
- 4. Prior to opening, Court Staff will review your documents to ensure everything is in compliance with the Local Rules and ECF Polices & Procedures Manual. Your email might be returned to you and revisions requested for a few reasons:
  - o Your civil cover sheet is missing information.
  - o Your complaint/notice of removal or civil cover sheet has not been signed.
  - You have multiple documents in one .pdf file. Your documents should be submitted all as separate .pdf files.
  - You have unredacted personal identifiers (such as a date of birth, SSN, or minor name) in your documents and we want to give you a chance to correct before filing.
  - o You haven't appropriately titled your attachments (see Pg. 12).
- 5. If your email is returned for revision, we will tell you what we need changed before the case can be opened.
- 6. Your case will be opened as of the date the final documents are received in the New Cases Inbox, even if that is a holiday or weekend.

How To: OPEN A NEW CASE - 1

#### **How to: Title Your Documents**

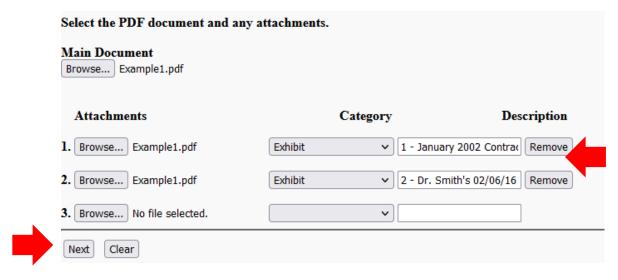
The ECF Policies & Procedures Manual II.A.4.a states,

Exhibits and attachments that are filed electronically shall be submitted as separate attachments to the document and shall be clearly labeled with the appropriate exhibit number (*i.e.*, Exhibit 1, Exhibit 2). Do not use alphabetical or alpha-numeric designations for exhibits. A description of the numbered exhibit must be provided in the docket entry (*i.e.*, Exhibit 15: January 2004 Contract).

Whether you are filing the documents on CM/ECF or sending in a new case to the New Cases Inbox, you must carefully follow these instructions. Failure to follow these may result in your documents being stricken by the Court.

#### When filing on CM/ECF:

- 1. First upload your main document.
- 2. Next, begin uploading your attachments.
- 3. Clearly title your documents numerically with descriptive titles.
- 4. If you have selected Exhibit as your category, it is not necessary to type Exhibit in the description (it will display on the docket sheet).



5. Click Next when you are ready to file.

#### How To: Request Admission Pro Hac Vice

Admission Pro Hac Vice is governed by LCvR83.2(g) and LCvR83.3.

#### LCvR83.2(g)

Admission Pro Hac Vice. Any attorney who is eligible for admission to the bar of this court may, in the discretion of a judge of this court, be granted temporary admission to practice in a pending case. Attorneys requesting such admission are required to attach to their motion a completed Request for Admission Pro Hac Vice form provided by the court clerk's office along with the required fee. Counsel admitted pro hac vice shall electronically file an entry of appearance consistent with LCvR83.4

#### LcVR83.3 Association of Local Counsel

- (a) **Responsibilities of Non-Resident Counsel.** When representing a party in this court, any attorney who is not a resident of, and does not maintain an office in, Oklahoma shall show association with an attorney who is personally appearing in the action and who is a resident of Oklahoma and maintains a law office within the State of Oklahoma, and who has been duly and regularly admitted to practice in this court.
- (b) **Responsibilities of Local Counsel.** It is the responsibility of local counsel appearing in any civil case to file the motion of the non-resident attorney to be admitted pro hac vice and to certify in the motion that the non-resident attorney is a member in good standing of the bar of the highest court of the state where the non-resident attorney resides or is licensed. The local attorney shall sign the first pleading filed and shall continue in the case unless other local counsel is submitted. Any notice, pleading, or other paper may be served upon the local attorney with the same effect as if personally served on the non-resident attorney.
- (c) **Relief from this Rule.** Relief from this rule is within the court's discretion upon motion establishing financial hardship, special qualifications of non-resident counsel, or other good cause, provided that out-of-state counsel certifies familiarity with the local civil court rules.

#### HOW TO FILE A MOTION FOR LEAVE TO APPEAR PRO HAC VICE:

#### **Non-Resident Counsel:**

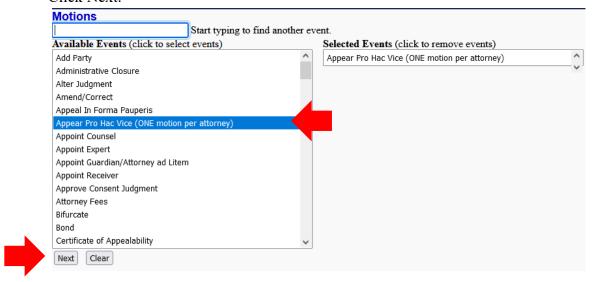
- 1. Complete the "Request for Admission Pro Hac Vice" form (which is available at <a href="www.okwd.uscourts.gov">www.okwd.uscourts.gov</a> under Forms) and provide it to local counsel.
- 2. Once the Motion is granted, promptly request e-filing status through PACER (see Pg. 38) and file an entry of appearance in the case (See Pg. 3).

#### **Local Counsel:**

1. Local Counsel is responsible for filing the Motion for Leave to Appear Pro Hac Vice. For the purposes of these instructions, the Civil Menu displays. Select Motions.



2. From the list of available events, select "Appear Pro Hac Vice (ONE motion per attorney)". Click Next.



3. Enter the case number in simple terms (i.e. 18-5) and click Find This Case. Check the box next to the correct case number and click Next.



4. Verify the case number is correct and click Next. Do not click on your case number/title at this time, as this will take you to view the docket sheet.

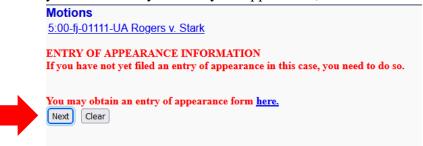
# Notices 5:00-fj-01111-UA Rogers v. Stark Next Clear

5. Select the filer and click Next.



How To: Request Admission Pro Hac Vice -  $\boldsymbol{3}$ 

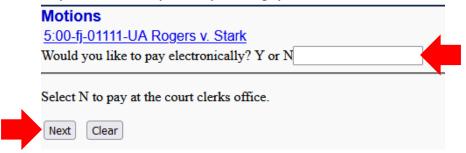
6. You will receive a reminder about filing an Entry of Appearance. If you have not already filed an Entry of Appearance, you must file one prior to filing this Motion. See Pg. 3. If you have already entered your appearance, click Next.



Upload your Motion as the main document, and the completed Request for Admission Pro
Hac Vice form as your attachment. Remember to numerically label and clearly title your
attachment. Click Next.



8. CM/ECF will allow you to electronically pay the \$50.00 PHV Admission fee. You may enter Y to pay it now, which will result in a second window opening to allow you to pay using Pay.gov. Selecting N will allow you to continue to the next step of the filing process. If you select N, you may later pay at the Court Clerk's Office or over the phone.

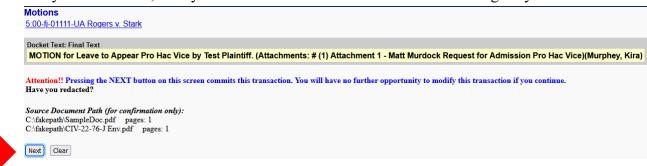


9. You will have an opportunity to modify your docket text as follows. If you wish to make no changes, you may click Next.



How To: Request Admission Pro Hac Vice - 4

10. Review your docket sheet at this step to ensure everything is accurate. Clicking next will file your document, and you will receive a Notice of Electronic Filing in your email.



#### HOW TO: FILE SEALED DOCUMENTS

Sealed pleadings are governed by ECF Policies & Procedures Manual III.A. These procedures should be used under the authority of the Local Rules and ECF Policies & Procedures Manual. With rare exceptions, leave of court is required prior to filing any document under seal.

#### IF YOU HAVE A SEALED EXHIBIT:

- 1. LCvR5.2.2 requires that any documents filed under seal (including exhibits) must include the words "FILED UNDER SEAL" in or above the caption.
- If only the exhibit should be filed under seal, first file your main document and any unsealed exhibits publicly. In place of the sealed exhibits, upload a cover page which includes the case caption and "filed under seal".
- 3. Follow the instructions below to file, using Sealed Exhibit.

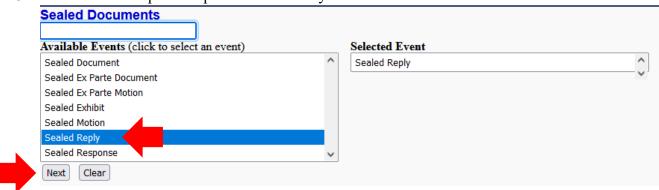
#### HOW TO FILE A DOCUMENT UNDER SEAL

#### (A document filed under seal will be accessible to all case participants.)

- 1. LCvR5.2.2 requires that any documents filed under seal must include the words "FILED UNDER SEAL" in or above the caption.
- 2. Select the appropriate menu (civil or criminal). For the purposes of these instructions, the civil menu displays. Select Sealed Documents.

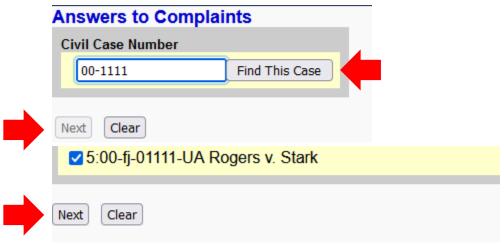


3. Select the most specific option available to you. Click Next.



How to: FILE SEALED DOCUMENTS - 1

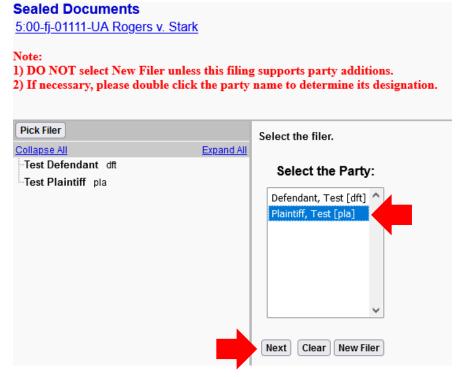
4. Enter the case number in simple terms (i.e. 18-5) and click Find This Case. Check the box next to the correct case number and click Next.



5. Verify the case number is correct and click Next. Do not click on your case number/title at this time, as this will take you to view the docket sheet.

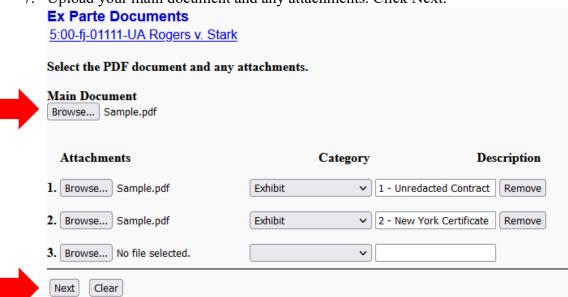


6. Select the filer and click Next.



How to: FILE SEALED DOCUMENTS - 2

7. Upload your main document and any attachments. Click Next.



8. Carefully consider whether this document should link to another document in the case. For instance, if you are filing sealed exhibits, you may want to link back to the original motion. If you are linking back to a document, selecting the checkbox beside the question will generate a list of documents filed in this case. Click Next.



9. This screen includes instructions for Filing and Viewing Civil Sealed/Ex Parte Documents. Click Next.



10. The default docket text will be as generic as possible to protect the safety of your sealed document. Click next to complete the filing.

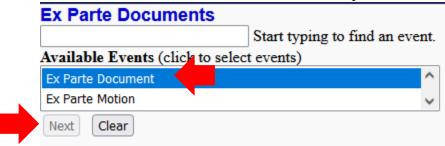


## HOW TO FILE A DOCUMENT EX PARTE (A document filed ex parte will be accessible to you only.)

- 1. LCvR5.2.2 requires that any documents filed under seal must include the words "FILED UNDER SEAL" in or above the caption.
- 2. Select the appropriate menu (civil or criminal). For the purposes of these instructions, the civil menu displays. Select Ex Parte Documents.



3. Select the option that best represents the document you are filing. For the purposes of these instructions, we will select Document, but the steps will be the same for either. Click Next.



4. Enter the case number in simple terms (i.e. 18-5) and click Find This Case. Check the box next to the correct case number and click Next.



5. Verify the case number is correct and click Next. Do not click on your case number/title at this time, as this will take you to view the docket sheet.

# Notices 5:00-fj-01111-UA Rogers v. Stark Next Clear

6. Select the appropriate filer and click Next.



7. Upload your main document and any attachments. Click Next.

Ex Parte Documents	•							
5:00-fj-01111-UA Roger	5:00-fj-01111-UA Rogers v. Stark							
Select the PDF document	Select the PDF document and any attachments.							
Main Document  Browse Sample.pdf								
Attachments	•	Category	Description					
Attachments  1. Browse Sample.pdf	Exhibit							
		✓ 1 - Unred	acted Contract Remove					
1. Browse Sample.pdf	Exhibit Exhibit	✓ 1 - Unred						

8. Carefully consider whether this document should link to another document in the case. For instance, if you are filing ex parte exhibits, you may want to link back to the original motion. If you are linking back to a document, selecting the checkbox beside the question will generate a list of documents filed in this case. Click Next.



9. Email the assigned Judge to inform them that you have filed a document under seal. Selecting the judge's name will open a email in your preferred email program. When you have finished, click next.

***IMPORTANT***					
This event will NOT send NEFs to anyone, including the judge.					
Please click a judge or judges below to manually send an email.					
Please put the case number in the Subject of the email.					
<u>Judge DeGiusti</u>					
Judge Palk					
Judge Goodwin					
Judge Wyrick					
Judge Dishman					
Judge Jones					
Judge Russell					
Judge Cauthron					
Judge Friot					
Judge Heaton					
Judge Purcell					
Judge Erwin					
Judge Mitchell					
After completing the email, you MUST return to this screen and click Next to complete the filing.					
Next Clear					

10. If you emailed the judge, type Y and click Next. Typing N or leaving the box empty will prompt you to return to the previous screen and email a judge.

	Ex Parte Documents	
	5:00-fj-01111-UA Rogers v. Stark	4
	Did you email a judge on the previous screen Y/N ? Y	
<b>\</b>	Next Clear	

11. Click next again.

#### **Ex Parte Documents**





Next Clear

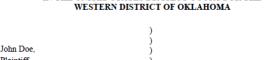
12. The default docket text will be as generic as possible to protect the safety of your ex parte document. Click next to complete the filing.



#### HOW TO: FILE CONVENTIONAL DOCUMENTS AND EXHIBITS

The ECF Policies & Procedures Manual II.A.1(c) and III governs conventionally filed documents. Leave of Court is required to conventionally file except as identified in the ECF Policies & Procedures Manual.

- 1. You must first file the ECF Notice of Conventional Filing form (available at <a href="https://www.okwd.uscourts.gov">www.okwd.uscourts.gov</a>). If this form is not on file, the Clerk's Office cannot accept your documents.
- 2. If you are conventionally filing an exhibit but the main document is electronically filed:
  - First, electronically file the main document and any unsealed exhibits.
  - In the place of the exhibit that will be conventionally filed, attach a placeholder page with a brief description of the exhibit indicating that it will be conventionally filed with the Clerk's Office.



IN THE UNITED STATES DISTRICT COURT FOR THE

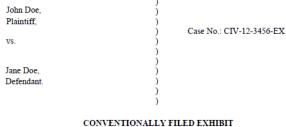


Exhibit filed conventionally at the Court Clerk's Office

- 3. Once these are electronically filed on CM/ECF, bring **two** copies of your conventionally filed document to the Clerk's Office with a copy of the ECF Notice of Conventional Filing.
- 4. The Clerk's Office will maintain one copy as part of the record, and the second copy will be provided to the Judge's Chambers for review.

#### HOW TO: SEARCH FOR A FILING EVENT ON CM/ECF

If you cannot find the correct filing option by browsing the Civil or Criminal tabs on CM/ECF, you can utilize the Search option.

1. With CM/ECF open, select the Search option between Utilities and Help.



2. A search box will appear at the right-hand corner of your screen. Search using general terms (i.e., for Entry of Appearance use "appearance" or "entry"). Click Search.



3. Results will appear with available options.



4. Select the appropriate option to file.

#### **How To: FILE A MISCELLANEOUS MOTION**

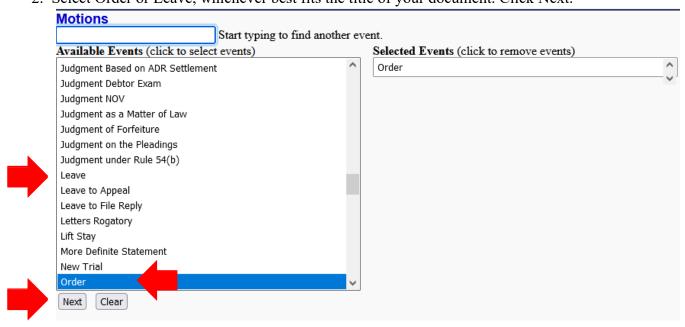
CM/ECF is equipped with filing options for most common documents. However, there may be times you need to file a motion with an extremely specific title, for which there is no filing option in CM/ECF.

In this situation, always first use the Search option on CM/ECF. If there are no applicable results, you may file the motion using the "Motion for Order" or "Motion for Leave" option.

1. On the civil or criminal tab, select Motions. For the purposes of these instructions, the civil tab displays.

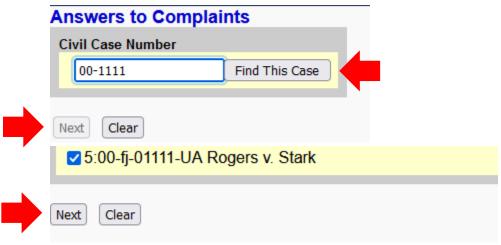


2. Select Order or Leave, whichever best fits the title of your document. Click Next.



How To: FILE A MISCELLANEOUS MOTION - 1

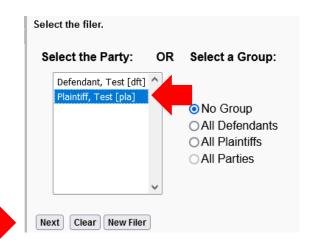
3. Enter the case number in simple terms (i.e. 18-5) and click Find This Case. Check the box next to the correct case number and click Next.



4. Verify the case number is correct and click Next. Do not click on your case number/title at this time, as this will take you to view the docket sheet.

# Next Clear 5. Select Next a second time. Motions 5:00-fj-01111-UA Rogers v. Stark Next Clear

6. Select the filer. Click Next.



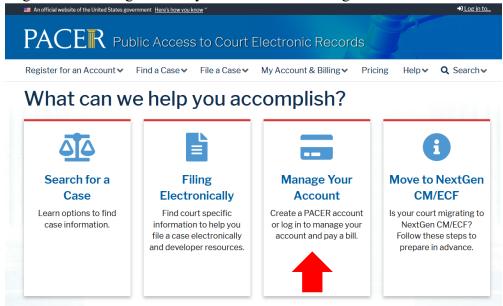
7. Upload your main document and any attachments. Click Next. **Motions** 5:00-fj-01111-UA Rogers v. Stark Select the PDF document and any attachments. Main Document Browse... Sample.pdf Description Attachments Category 1. Browse... No file selected. Next Clear 8. Modify your docket text to indicate the title of the Motion and click Next. **Motions** 5:00-fj-01111-UA Rogers v. Stark Docket Text: Modify as Appropriate. MOTION for Order to Appear Telephonically by Test Plaintiff. (Murphey, Kira) Next Clear 9. Review your docket text at this step to ensure everything is accurate. Clicking next will file your document, and you will receive a Notice of Electronic Filing in your email. Motions 5 00-tj-0 1111-UA Rogers v. Stark Docket Text Singl Text MOTION for Order to Appear Telephonically by Test Plaintiff. (Murphey, Kira) Attention!! Pressing the NEXT button on this screen commits this transaction. You will have no further opportunity to modify this transaction if you continue. Have you reducted? Source Document Path (for confirmation only): C:\fakepath\Samplepdf pages; 4

Next Clear

#### **HOW TO: UPDATE YOUR CONTACT INFORMATION**

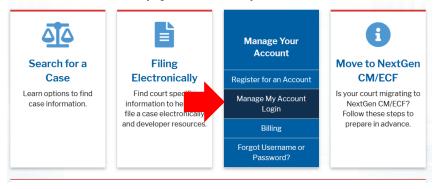
Updating your address, primary email address, phone number, etc., will be done through PACER.

1. Log on to PACER.gov. Place your mouse over Manage Your Account to view options.



2. Click Manage My Account Login.

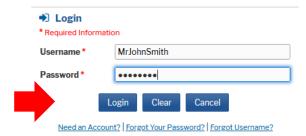
#### What can we help you accomplish?



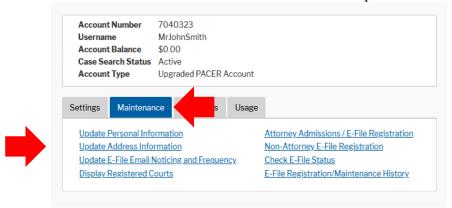
3. Click Log in to Manage My Account.



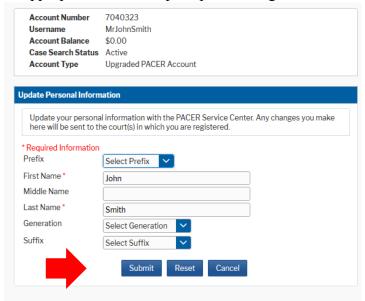
4. Input your Username and Password and click Login.



5. Click the Maintenance tab to browse available options. Select the appropriate option.



6. This screen displays Update Personal Information. Other screens will be similar; follow the appropriate on-screen prompts to change the desired information and click Submit.



- 7. Your update will be sent to the Court for approval. Once the update is approved, you will receive an email and your updated information will be display on the docket sheet of any pending case.
- 8. If you have trouble logging into PACER or making the desired changes, please reach out to the PACER Help Desk at 800-676-6856.

#### **HOW TO: UPDATE YOUR EMAIL ADDRESS**

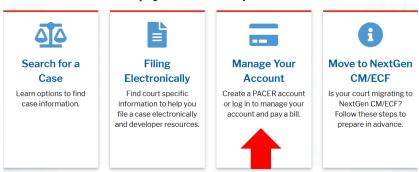
You will receive emails containing Notice of Electronic Filings to both your primary and secondary email addresses. Your primary email address will display on case docket sheets with other contact information and will be updated on PACER. Your secondary email addresses (which may be for paralegals or other individuals in your office) will be updated on CM/ECF.

#### UPDATING YOUR PRIMARY EMAIL ADDRESS

Updating your primary email address will be done through PACER.

1. On PACER.gov, select from the four tiles on the main page. Place your mouse over Manage Your Account to view options.

#### What can we help you accomplish?



2. Click Manage My Account Login.

#### What can we help you accomplish?



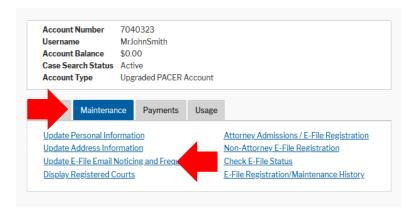
3. Click Log in to Manage My Account.



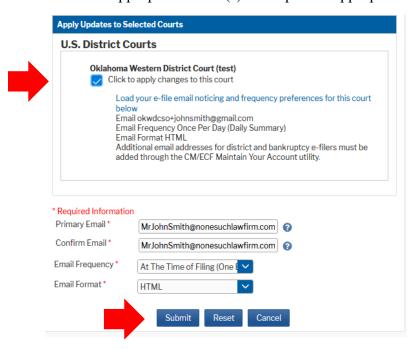
4. Input your Username and Password and click Login.



5. Click the Maintenance tab to browse available options. Select the Update E-File Email Noticing and Frequency.



6. Select the appropriate Court(s) and input the appropriate changes. Click Submit.



7. If you have trouble accessing your PACER account or making the desired changes, please reach out to the PACER Help Desk at 800-676-6856.

#### **UPDATING YOUR SECONDARY EMAIL ADDRESSES**

1. Log in to CM/ECF and select Utilities from the top menu bar.



2. Under Your Account, select Maintain Your Email.

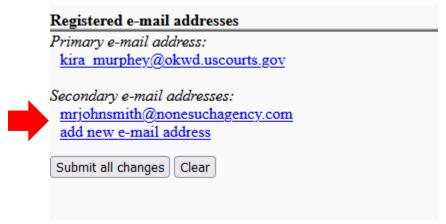




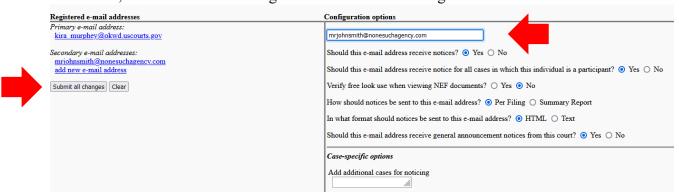
#### Your Account

Maintain Your E-mail
View Your Transaction Log
Change Client Code
Review Billing History

3. Select the email address you would like to edit under Secondary e-mail addresses, or click Add New E-Mail Address.



4. On the left, make the desired changes. Click Submit all changes.



#### How To: Link your PACER and CM/ECF Accounts

For Federal Courts on NextGen CM/ECF, you will access both the filing system and the viewing system using the same PACER credentials. The Western District of Oklahoma upgraded to NextGen CM/ECF in August of 2020, so if you have not filed since then you may need to link your accounts prior to filing again. After linking your accounts, you will use your PACER account for all filing and viewing access to the Western District of Oklahoma.

- 1. Log on to the Western District of Oklahoma's CM/ECF either through the Court's website (<a href="www.okwd.uscourts.gov">www.okwd.uscourts.gov</a>) or on PACER.gov. You will be taken to the PACER login page. Login using your **personal** PACER account (if your law firm has a shared PACER account, you will need an individual account prior to linking).
- 2. After logging in you will see a limited menu bar. Go to Utilities and click NextGen Release 1.1 Menu Items.

#### Utilities

#### Your Account

Maintain Your E-mail
View Your Transaction Log
Change Client Code
Review Billing History

#### Miscellaneous

Internet Payment History
Certificate of Good Standing - Request
Legal Research ...
Mailings...

Verify a Document

Application Administration

NextGen Release 1.1 Menu Items



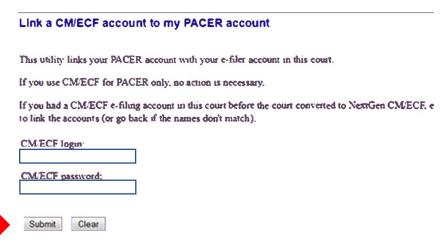
3. Select Link a CM/ECF account to my PACER account.

#### NextGen Release 1.1 Menu Items



Change PACER Exemption Status
Link a CM/ECF account to my PACER account
Maintain Your Login/Password
Bar Admission

4. In this Court, your CM/ECF login is probably your bar number, but if you do not remember your login or password call the Help Desk at 405-609-5555. Enter your old CM/ECF login and password and click Submit.



 Make sure you are linking the correct PACER account to your CM/ECF account. You should **never** link shared PACER accounts to a CM/ECF account. If correct, click Submit.



6. Confirmation will appear.

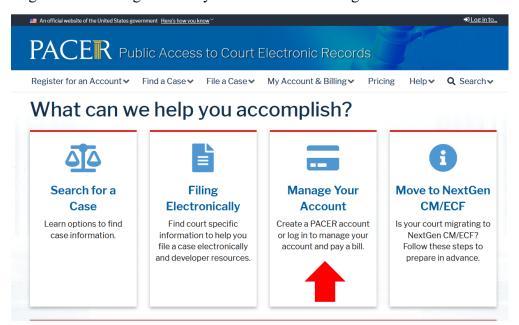
### Your PACER account has been linked to your CM ECF account

- 7. Click any of the menu items on the menu bar (except Log Out) to update the menu and you will see the Civil and Criminal tabs appear to allow you to file.
- 8. In the future, you will log in to view and file using only your PACER credentials; your old CM/ECF credentials will never be necessary again.

### How To: Request Electronic Filing Access

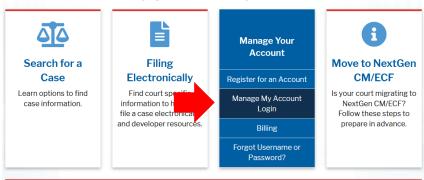
You must be admitted to practice in the Western District of Oklahoma prior to requesting electronic filing access. This can be full admission or pro hac vice admission. If you have not been admitted, your request will be rejected.

1. Log on to PACER.gov. Place your mouse over Manage Your Account to view options.



2. Click Manage My Account Login.





3. Click Log in to Manage My Account.



1. Enter your PACER Username and Password. This must be your **individual**, **attorney account**. No shared accounts or legal assistant accounts may be used.



2. Select the Maintenance tab, then select Attorney Admissions/E-File Registration.



3. From the **Court Type** list, select US District Courts. From the **Court** list, select Oklahoma Western District – NextGen. Click Next.



What would you like to apply/register for?

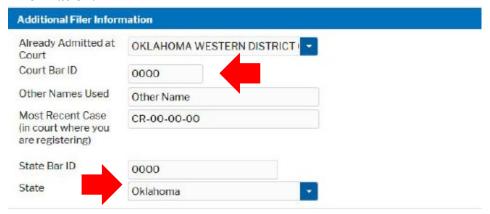
Attorney Admissions and E-File

E-File Registration Only

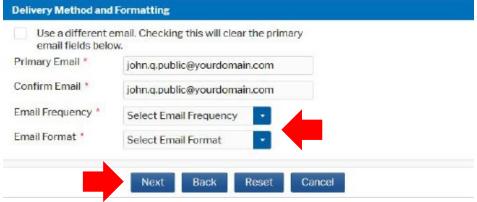
Pro Hac Vice

Federal Attorney

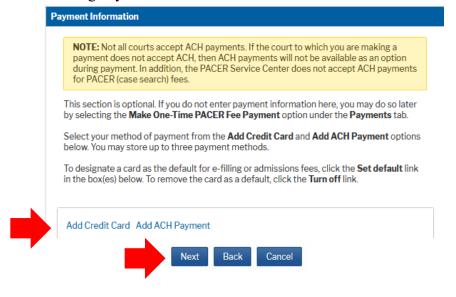
5. Scroll down to the middle section and complete all sections of the **Additional Filer Information.** 



6. At the next section, you **must** complete the Delivery Method and Formatting section of the form. This determines how you will receive Notice of Electronic Filing emails from the Court. Email address information comes from your existing PACER information.



7. Click Add Credit Card to enter payment information, if desired. Providing a credit card is optional. If you would like to register without providing a credit card, click Next without entering any information on this screen.



8. After clicking Next from the Payment Information screen, review the E-Filing Terms of Use and click Submit.

### Click here to download a printable version of the Attorney E-filing Terms and Conditions

Click here to acknowledge that you have read and agree to the terms and conditions above, and this constitutes your signature for registration. *
Click here to acknowledge that you have read and agree to the local requirements for the court in which you are registering. Click here to view local Court Policies and Procedures. *
Your e-file registration will be processed by the selected court. You will receive an email notification from the selected court regarding the status of your admissions and registration as well as any additional information or instructions at the email address provided.
Note: We protect the security of your information during transmission using Secure Sockets Layer (SSL) software, which encrypts information you submit.
Submit Back Reset Cancel

9. The Court will review your e-filing request and provide you with further instructions via email.



# INFORMATION THE CLERK'S OFFICE CAN/CANNOT PROVIDE

Please be advised that Clerk's Office staff is prohibited by law from offering legal advice. They are, however,

permitted to answer questions regarding procedure and how to access legal forms and reference resources. Listed below is a guide to what information the staff of the Clerk's Office can and cannot provide.

### INFORMATION THE CLERK'S OFFICE CAN PROVIDE:

- Information regarding Court policies and procedures.
- Public information from your case docket and how to obtain information from a public computer terminal located in the Clerk's Office.
- Court forms and court schedules.
- Information on how to access the Federal Rules of Civil Procedure, the Local Rules of the Court, and other legal resources.

# Information the Clerk's Office Cannot Provide:

- Legal advice.
- Guidance on whether or not you should file a case or other pleadings.
- Instruction on what to write in court documents and what to say in court proceedings
- Interpretation of court orders.
- Computation of deadlines in your case.
- Direct communication with the assigned Judge on your behalf.
- Direction on what to do next in your case.
- Access or information regarding any restricted or sealed document, including whether a case is sealed.

## <u>CM/ECF Civil Menu for Attorneys – Western District of Oklahoma</u> As of July 5, 2022

#### INITIAL PLEADINGS AND SERVICE

# COMPLAINTS AND OTHER INITIATING DOCUMENTS

- Amended Complaint
- Complaint (Amended Fourth Party)
- Counterclaim
- Counterclaim (Amended)
- Crossclaim
- Crossclaim (Amended)
- Fourth Party Complaint
- Intervenor Complaint
- Petition for Writ of Habeas Corpus (Amended)
- Petition for Writ of Habeas Corpus (Death Penalty)
- Third Party Complaint

# ANSWERS TO COMPLAINTS/DISCLAIMERS

• Filing event leads directly to Answer.

#### OTHER ANSWERS

- Affidavit in Support
- Amended Answer to Complaint
- Answer to Writ of Garnishment
- Claim
- Objection to Report and Recommendation

#### SERVICE OF PROCESS

- Acknowledgement of Service
- Affidavit of Service NON SUMMONS
- Certificate of Service NON SUMMONS
- Praecipe for Special Execution and Order of Sale
- Proof of Service by Publication
- Request for Waiver of Service
- Return of Service NON SUMMONS
- Return on Sale USM
- Subpoena Returned Executed
- Subpoena Returned Executed as to Non-party
- Subpoena Returned Unexecuted
- Summons Returned Executed
- Summons Returned Executed as to Non-party
- Summons Returned Executed as to USA
- Summons Returned Executed on Garnishee
- Summons Returned Unexecuted
- Waiver of Service Executed
- Waiver of Service Unexecuted

# MOTIONS AND RELATED FILINGS MOTIONS (CONT.)

- Add Party
- Administrative Closure
- Alter Judgment
- Amend/Correct
- Appeal In Forma Pauperis
- Appear Pro Hac Vice (ONE motion per attorney)
- Appoint Counsel
- Appoint Expert
- Appoint Guardian/Attorney ad Litem
- Appoint Receiver
- Approve Consent Judgment
- Attorney Fees
- Bifurcate
- Bond
- Certificate of Appealability
- Certify
- Certify Class
- Change Venue
- Clarify
- Compel
- Consent for Magistrate's Trial
- Consolidate Cases
- Contempt
- Continue
- Costs
- Damages
- Declaration of Mistrial
- Declaratory Judgment
- Default Judgment
- Deposit Funds
- Directed Verdict
- Disbursement of Funds
- Discharge
- Disclosure
- Discovery
- Dismiss

- Dismiss Case as Frivolous
- Dismiss/Lack of Jurisdiction
- Dismiss/Lack of Prosecution
- Disqualify Counsel
- Disqualify Judge
- Enforce
- Entry of Default
- Exclude
- Expedite
- Extend Deadlines or Hearings
- Extend Time to Complete ADR
- Extension of Time
- Extension of Time to Amend
- Extension of Time to Complete Discovery
- Extension of Time to File Answer
- Extension of Time to File Response/Reply
- File Amicus Brief
- File Excess Pages
- Forfeiture of Property
- Friendly Suit Hearing
- Hearing
- In Limine
- Interpleader Deposit (28 U.S.C. Section 1335)
- Interpleader Disbursement (28 U.S.C. Section 1335)
- Intervene
- Issuance of Warrant in rem
- Joinder
- Judgment
- Judgment Based on ADR Settlement
- Judgment Debtor Exam
- Judgment NOV
- Judgment as a Matter of Law
- Judgment of Forfeiture
- Judgment on the Pleadings

### MOTIONS (CONT.)

- Judgment under Rule 54(b)
- Leave
- Leave to Appeal
- Leave to File Reply
- Letters Rogatory
- Lift Stay
- More Definite Statement
- New Trial
- Order
- Partial Summary Judgment
- Permanent Injunction
- Preliminary Injunction
- Pretrial Conference
- Proceed In Forma Pauperis
- Produce
- Protective Order
- Quash
- Reconsideration
- Recusal
- Refer Case to ADR
- Release of Bond Obligation
- Release of Funds
- Remand
- Remand to Agency
- Remand to State Court
- Reopen Case
- Request for Refund
- Return of Property
- Review Taxation of Costs
- Ruling
- Sanctions
- Seal
- Seal Document
- Seal Document/Directing Filing of Redacted Document
- Service by Publication
- Set Aside

- Set Aside Default
- Set Aside Judgment
- Settlement
- Show Cause
- Stay Case
- Strike
- Substitute Party
- Summary Judgment
- Supplement
- Take Deposition
- Taxation of Costs
- Temporary Restraining Order
- Transfer Case
- Traverse
- Unseal Document
- Vacate
- Withdraw
- Withdraw Reference
- Withdraw as Attorney
- Writ
- Writ of Garnishment
- Writ of Habeas Corpus ad prosequendum
- Writ of Habeas Corpus ad testificandum
- Writ of Mandamus

#### RESPONSES AND REPLIES

- Affidavit in Opposition to Motion
- Affidavit in Support of Motion
- ERISA Reply Brief
- ERISA Response Brief
- Memorandum in Opposition
- Memorandum in Support
- Objection to Report and Recommendation
- Objections
- Reply
- Reply to Response to Motion
- Response in Opposition to Motion
- Response in Support of Motion
- Response to Motion
- Response to Non Motion
- Response to Order to Show Cause
- Social Security Reply Brief
- Social Security Response Brief
- Surreply

#### PROPOSED ORDERS

Proposed Orders should be sent by electronic mail to the appropriate Judge's Proposed Orders Inbox.

- Cauthron-Orders@okwd.uscourts.gov
- DeGiusti-Orders@okwd.uscourts.gov
- Dishman-Orders@okwd.uscourts.gov
- Friot-Orders@okwd.uscourts.gov
- Goodwin-Orders@okwd.uscourts.gov
- Heaton-Orders@okwd.uscourts.gov
- Jones-Orders@okwd.uscourts.gov
- Palk-Orders@okwd.uscourts.gov
- Russell-Orders@okwd.uscourts.gov
- Wyrick-Orders@okwd.uscourts.gov
- Erwin-Orders@okwd.uscourts.gov
- Green-Orders@okwd.uscourts.gov
- Mitchell-Orders@okwd.uscourts.gov
- Purcell-Orders@okwd.uscourts.gov

#### **OTHER FILINGS**

#### **NOTICES**

- Certificate of Counsel
- Entry of Appearance
- Notice of Acceptance with Offer of Judgment
- Notice of Address Change
- Notice of Appeal
- Notice of Bankruptcy
- Notice of Conventional Filing
- Notice of Filing Notice of Removal
- Notice of Hearing on Motion
- Notice of Lis Pendens
- Notice of Pending Motions

- Notice of Related or Companion Case
- Notice of Release of Lis Pendens
- Notice of Settlement
- Notice of Subpoena
- Notice of United States Marshal's Sale
- Notice of Voluntary Dismissal
- Notice to Take Deposition
- Notice: Return of State Court Records
- ~Notice (other)

#### **ADR DOCUMENTS**

- ADR Report by Mediator/Evaluator
- ADR Report by Parties
- ADR Selections/Arrangements-Mediator / Evaluator
- Consent to Non-Binding Arbitration

#### TRIAL DOCUMENTS

- Counter Designation of Deposition Testimony
- Designation of Deposition Testimony
- Exhibit List
- Exhibit List / Witness List
- Final Contentions
- Final Pretrial Report
- Proposed Findings of Fact
- Proposed Jury Instructions
- Proposed Verdict Form
- Proposed Voir Dire
- Trial Brief
- Witness List
- Witness List Expert

# **OTHER FILINGS (CONT.)**

#### APPEAL DOCUMENTS

- Amended Notice of Appeal
- Appeal Transcript Request
- Appeal of Magistrate Judge Decision to District Court
- Designation of Record on Appeal
- Notice of Appeal
- Notice of Cross Appeal
- Notice of Interlocutory Appeal
- Transcript Order Form

#### BANKRUPTCY DOCUMENTS

- Appellants Brief
- Appellants Reply Brief
- Appellees Brief

#### SOCIAL SECURITY/ERISA FILINGS

- ERISA Admin Record
- ERISA Opening Brief
- ERISA Reply Brief
- ERISA Response Brief
- Social Security Admin Record
- Social Security Opening Brief
- Social Security Reply Brief
- Social Security Response Brief

#### OTHER DOCUMENTS

- Affidavit
- Affidavit of Garnishment
- Amended Document (NOT Motion)
- Amicus Curiae Appearance
- Appendix
- Application for Writ
- Bill of Costs
- Brief
- Certificate
- Consent to Proceed Before US Magistrate Judge
- Declaration
- Disclosure Statement Corporate
- Disclosure Statement LLC
- Joint Discovery Plan
- Joint Status Report
- Joint Status Report and Discovery Plan
- Jury Demand
- Payment for a Civil Case
- Receivers Financial Report
- Redaction Request Transcript
- Release of Garnishment

- Release of Judgment
- Renewal of Judgment
- Satisfaction of Judgment
- Settlement Agreement
- Special Report
- Status Report
- Stipulation
- Stipulation of Dismissal
- Suggestion of Bankruptcy
- Suggestion of Death
- Supplement
- Transcript Request

#### SEALED AND/OR EX PARTE FILINGS

# SEALED DOCUMENTS

- Sealed Document
- Sealed Ex Parte Document
- Sealed Ex Parte Motion
- Sealed Exhibit
- Sealed Motion
- Sealed Reply
- Sealed Response

#### EX PARTE DOCUMENTS

- Ex Parte Document
- Ex Parte Motion

#### SEALED PROPOSED ORDERS

 Sealed Proposed Orders should be sent to the Sealed Proposed Orders Inbox:

<u>Sealed\_Proposed\_Orders@okwd.uscourts.gov</u>

# CM/ECF CRIMINAL MENU FOR ATTORNEYS – WESTERN DISTRICT OF OKLAHOMA

As of July 5, 2022

#### MOTIONS AND RELATED FILINGS

#### **MOTIONS**

- Acceptance of Responsibility Downward Adjustment
- Acquittal
- Alter Judgment
- Amend/Correct
- Appeal In Forma Pauperis
- Appear Pro Hac Vice (ONE motion per attorney)
- Appoint Counsel
- Appoint Counsel First Step Act of 2018
- Appoint Counsel re USSC Amendment
- Appoint Expert
- Bill of Particulars
- Bond
- Brady Materials
- Certificate of Appealability
- Change Venue
- Claim for Exemption
- Combined Plea and Sentencing
- Compassionate Release First Step Act of 2018
- Compel
- Continue
- Correct or Reduce Sentence (Rule 35)
- Declaration of Mistrial
- Detain
- Disclosure
- Discovery
- Dismiss
- Dismiss Counts
- Dismiss/Lack of Jurisdiction
- Dismiss/Speedy Trial

- Disqualify Counsel
- Disqualify Judge
- Downward Departure
- Early Termination of Supervised Release/Probation
- Enforce IRS Summons
- Exclude
- Expedite
- Extension of Time
- Extension of Time re Transcript
- Extension of Time to File Document
- Extension of Time to File Response/Reply
- Extension of Time to Indict
- File Excess Pages
- Forfeiture of Property
- Hearing
- In Limine
- Inspect
- Joinder
- Judgment Debtor Exam
- Judgment NOV
- Judgment of Acquittal
- Leave to Appeal
- Leave to File Document
- Medical Exam
- Medical Treatment
- Modify Conditions of Release
- New Trial
- Order
- Order of Competency to Stand Trial
- Produce
- Protective Order
- Psychiatric Exam
- Psychiatric Treatment

CM/ECF CRIMINAL MENU - 1

### MOTIONS (CONT.)

- Quash
- Reconsideration
- Recusal
- Reduce Sentence USSC Amendment
- Reduce Sentence re Crack Cocaine Offense – 18:3582
- Release Bond Obligation
- Release from Custody
- Release of Funds
- Remand
- Remand to State Court
- Request for Refund
- Return of Property/PostTrial
- Return of Property/PreTrial
- Return of Surety
- Revoke
- Sanctions
- Seal Case
- Seal Document
- Seal Document/Directing Filing of Redacted Document
- Sentence Modification First Step Act of 2018
- Separate Trial on Counts
- Set Aside Judgment
- Set Aside Sentence
- Set Aside Verdict

- Sever Defendant
- Show Cause
- Show Cause re Revocation of Probation
- Show cause re Revocation of Supervised Release
- Strike
- Suppress
- Travel
- Unseal Case
- Unseal Document
- Upward Departure
- Vacate
- Vacate (2255)
- Variance
- Victim Rights
- Warrant
- Warrant for Arrest of Property
- Withdraw Document
- Withdraw Plea of Guilty
- Withdraw as Attorney
- Writ
- Writ of Garnishment
- Writ of Habeas Corpus ad prosequendum
- Writ of Habeas Corpus ad testificandum

#### RESPONSES AND REPLIES

- Affidavit in Support of Motion
- Memorandum in Support
- Objections
- Reply
- Reply to Response

- Response in Opposition
- Response in Support
- Response to Motion
- Response to Non Motion
- Response to Order to Show Cause

#### PROPOSED ORDERS

Proposed Orders should be sent by electronic mail to the appropriate Judge's Proposed Orders Inbox.

- Cauthron-Orders@okwd.uscourts.gov
- <u>DeGiusti-Orders@okwd.uscourts.gov</u>
- Dishman-Orders@okwd.uscourts.gov
- <u>Friot-Orders@okwd.uscourts.gov</u>
- Goodwin-Orders@okwd.uscourts.gov
- <u>Heaton-Orders@okwd.uscourts.gov</u>
- Jones-Orders@okwd.uscourts.gov
- Palk-Orders@okwd.uscourts.gov
- Russell-Orders@okwd.uscourts.gov
- Wyrick-Orders@okwd.uscourts.gov
- Erwin-Orders@okwd.uscourts.gov
- Green-Orders@okwd.uscourts.gov
- Mitchell-Orders@okwd.uscourts.gov
- Purcell-Orders@okwd.uscourts.gov

#### **NOTICES**

- Advisement to Court Notice
- Entry of Attorney Appearance Defendant
- Entry of Attorney Appearance USA
- Memorandum Regarding Related Cases
- Notice of Address Change
- Notice of Appeal
- Notice of Consular Notification
- Notice of Conventional Filing
- Notice of Intent to Seek Death Penalty
- Notice of Intent to Use 404b Evidence
- Notice of Prior Convictions (by Plaintiff)
- ~Notice (Other)

#### **OTHER FILINGS**

#### **DISCOVERY DOCUMENTS**

- Joint Discovery Statement
- Notice of Insanity Defense
- Notice of Intent to Use Evidence

#### WAIVERS

- Waiver (other)
- Waiver of Counsel
- Waiver of Jury Trial
- Waiver of Right to Appeal
- Waiver of Right to Separate Counsel
- Waiver of Speedy Trial

#### SERVICE OF PROCESS

- Application for Subpoenas duces tecum
- Certificate of Service NON SUMMONS
- Praecipe for Special Execution and Order of Sale
- Subpoena Returned Executed
- Subpoena Returned Unexecuted

#### TRIAL DOCUMENTS.

- Exhibit List
- Exhibits
- Memorandum of Law
- Proposed Findings of Fact
- Proposed Jury Instructions
- Proposed Verdict Form
- Proposed Voir Dire
- Stipulation to Jury
- Trial Brief
- Witness List

#### APPEAL DOCUMENTS

- Appeal Transcript Request
- Designation of Record on Appeal
- Transcript Order Form

CM/ECF CRIMINAL MENU - 3

#### OTHER DOCUMENTS

- Affidavit
- Amended Document (NOT Motion)
- Brief
- Brief in Support
- Certificate
- Criminal Statement
- Information to Establish Prior Conviction
- Joint Discovery Statement
- Joint Status Report
- Objection to Presentence Investigation Report
- Objection to Report and Recommendation
- Petition for Remission of Fine
- Pretrial Memorandum
- Redaction Request Transcript
- Release of Garnishment
- Satisfaction of Monetary Penalties
- Sentencing Memorandum
- Status Report
- Stipulations
- Supplement
- Transcript Request

# SEALED AND/OR EX PARTE FILINGS SEALED AND/OR EX PARTE DOCUMENTS

- Sealed and/or Ex Parte Appendix/Brief/Memorandum in Support
- Sealed and/or Ex Parte Document
- Sealed and/or Ex Parte Motion
- Sealed and/or Ex Parte Reply/Surreply
- Sealed and/or Ex Parte Response/Objection

#### SEALED PROPOSED ORDERS

• Sealed Proposed Orders should be sent to the Sealed Proposed Orders Inbox:

Sealed Proposed Orders@okwd.uscourts.gov