

CASD CM/ECF NEXTGEN v1.3 TESTING

v1.3 GUIDES: <http://fpps-docs.gtwy.dcn/cmecf/prod/district/1.3/#t=District.htm>
 SDSO RESOURCES: <http://training.sdsd.ao.dcn/CourseResource.aspx?id=1363>

COURT USERS JENIE Environment: <https://jenie.ao.dcn/>
 COURT USERS JENIE Staging Environment: <https://sjenie.ao.dcn/>
 TOGGLE TOOL: <https://ecf-test.casd.uscourts.gov/CMECFHelpDeskUtility.html>
 PACER LIVE: <https://pacer.gov/>
 PACER TRAIN: <https://train.pacer.gov/>

TASK #	Subject	Assigned	Comments / Action	Testing Complete / Findings
	Prerequisite Housekeeping	CM/ECF Team		
1.	Establish email accounts for testing			
2.	Establish PACER accounts for testing		Atty, CJA, and Pro Se Accts	
3.	Contact PACER re test accounts		Have accounts from #2 marked as exempt (except CJA account in order to test exempt toggle)	
4.	Set up user credentials for those needing CSO: public user/JENIE access		Create JENIE account for testing access, etc.	
5.	Set atty admissions fee to \$1 and get active credit card to use			
6.	Ensure test .pdfs are available		I:\Everyone_CM-ECF COMM NOTES\Miscellaneous	
7.	Review expectations and format of training			
	I.T. Applications, Reports, etc.	I.T.		
8.	Public Terminals		Verify 4 th floor public terminals working	
9.	Kiosk Export			
10.	External Site - Court Hearings			
11.	External/Internal Website Links			
12.	CASD OSL 1325			
13.	Daily Calendar			
14.	e-Voucher			
	Accessing NextGen CM/ECF	All		
15.	Logging into JENIE	All	https://jenie.ao.dcn/ <ul style="list-style-type: none"> • Access legacy CM/ECF menu • Access HRMIS • Access Clerk's Office Workspace 	

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			<ul style="list-style-type: none"> Access NextGen Court Links 	
	Workspace	JCJ		
16.	Portlets		Verify all portlets working as designed	
17.	Edit Mode		Edit My CM/ECF - add, delete, configure portlets, etc.	
	NextGen Release 1.1 Menu Items	CM/ECF Team	Utilities - NextGen Release 1.1 Menu Items	
18.	Change PACER Exemption Status			
19.	Link a CM/ECF account to my PACER account			
20.	Workspace Landing Page		Redirect to PACER MANAGE MY ACCOUNT	
21.	Maintain Your Login/Password			
22.	Change My Role			
23.	Central Sign-On Administration: Public Users			
24.	Central Sign-On Administration: Judiciary Users			
25.	Central Sign-On Administration: Configuration			
26.	Bar Admission			
27.	NextGen Configuration			
28.	BusinessObjects Reports			
29.	Judge Review Packets			
30.	Citation Link Preferences		Additional Testing (See Items #92-93)	
31.	Toggle Tool			
	Jury	Jury		
32.	JSAP			
33.	Run Applicable CM/ECF Reports			
	Interpreter Reports	Interpreters		
34.	Interpreter Requirements Report			
35.	Interpreter Language Codes			
	System Maintenance	JCJ	Utilities - System Maintenance	
36.	Report Configuration			
37.	Edit Document Type Table			
38.	Unload Document Type Table			
39.	Generate Test Form			
40.	Access Control			
41.	System Administrator Reports			
42.	Update System Tables			

TASK #	Subject	Assigned	Comments / Action	Testing Complete / Findings
43.	Generate Announcement Notice			
	Case Assignment Reports/Updates	JCJ		
44.	Master Deck Report			
45.	Leave Report			
46.	Assignment History Report (Single)			
47.	Refill/Refresh a Deck			
48.	Edit Master Deck		Judge Out of Draw, Deck Parameters, etc.	
	Conflict Checking	JCJ	Utilities - Conflict Checking	
49.	Conflict Checking Report			
50.	Edit Conflict List			
51.	Run Conflict List Report			
52.	Configure Conflict Checking Report			
53.	Configure Judge Email Recipients			
	Statistical Reports	JCJ	Reports - National Statistical Reports	
54.	QC Status			
55.	Docket Timeliness			
56.	Patent Pilot Assignments			
57.	MJ Caseload			
58.	CJRA Report			
59.	JS-5/JS-6 Reports			
60.	JS-2/JS-3 Reports			
61.	Delayed Notice Reports			
62.	CASD District Court Statistical Reports			
63.	MJStar Report			
64.	JS-10 Trials Report			
	SQL Server Reporting Services	JCJ		
65.	CM/ECF SSRS Reports			
	Citation Links	CM/ECF Team	Utilities - CiteLink	
66.	PDF Links		Check LIVE orders for working links	
67.	Citation Display Preferences			
	Quality Control	CM/ECF Team		
68.	Enable QC Mode		DAR, Verify QC options working as designed	
69.	QC Mail Creator		Utilities - Quality Control	
	Civil/Criminal Reports	CM/ECF Team		
70.	Query			
71.	Docket Sheet			

TASK #	Subject	Assigned	Comments / Action	Testing Complete / Findings
72.	Docket Sheet (Orders Highlighted)			
73.	Multiple Docket Sheets			
74.	Motions Report			
75.	Service and Answer Report			
76.	Civil Cases Report			
77.	Civil Inventory			
78.	Criminal Inventory			
79.	Calendar Daily (Civil and Criminal)			
80.	Calendar Monthly (Civil and Criminal)			
81.	Event Restrictions Report			
	CM/ECF Links	CM/ECF Team		
82.	Links to Other Courts		Reports - PACER - Links to Other Courts	
83.	PACER Case Locator (National Index)		Reports - PACER - PACER Case Locator (National Index)	
84.	Email Addresses for Proposed Orders		CV/CR Events - Email Addresses for Proposed Orders	
85.	Forms		CV/CR Events - Resources - Forms	
86.	View On-Line Demonstrations		CV/CR Events - Resources - View On-Line Demonstrations	
87.	ECF Policies and Procedures Manual		CV/CR Events - Resources - ECF Administrative Policies...	
88.	Scenarios/Manuals		CV/CR Events - Resources - Scenarios/Manuals	
	CVB Reports	CVB, CM Team		
89.	CVB Disposition Docket			
90.	CVB Cases Report			
91.	CVB Offenses Report			
92.	CVB Audit Report			
93.	CVB from CMECF Audit Report			
94.	CVB Citation Translation Editor			
95.	CVB State Citation Table			
	Civil Master Case	CM/ECF Team		
96.	Master Case Submission		Submit a test entry in the Civil Master case; test pay.gov	
	Case Assignment - Civil	CS Intake		
97.	Civil - Initial Assignment (Random) *LIVE CASE(S)*		Assign saved LIVE paper case(s) or case(s) from master (SS Case, Habeas Case, Notice of Removal, Complaint)	Case #
98.	Civil - Initial Assignment (Random) *TEST CASE*		Case number to be used for testing case	TEST Case #
99.	Civil - Initial Assignment (Direct)		Pull a number to be voided (see item #103)	Case #
100.	Civil - Reassignment/Recusal (Random)		Use case number from #99, Reason - Transfer w/ No Card Drawn for New Judge	

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101.	Civil - Reassignment/Recusal (Direct)		Use case number from #99, Reason - Transfer w/ No Card Drawn for New Judge	
102.	Assignment Editor		Use case number from #99	
103.	Void an Assignment		Void case numbers from #98 and #99. Do not create a replacement assignment. Add voided number from #99 to SP list.	
	Civil Docketing Functions - Case Opening, Closing, etc.	CS, CM Team		
104.	Open a Case - Civil Case (Assigned) *LIVE CASE(S)*		Open saved paper case of case from master (Case number pulled #97)	Case #
105.	Open a Case - Civil Case (Unassigned) GENERIC COMPLAINT *TEST CASE*		Open TEST case in LIVE for test docketing. (Case number pulled #98) Plt Name: TEST PLAINTIFF, Dft Name: TEST DEFENDANT. To be sealed and/or deleted after testing complete.	Case #
106.	Complaint		Docket in case from #105	
107.	Summons Issued		Docket in case from #105	
108.	Motion for IFP		Docket in case from #105	
109.	Order on Motion for IFP		Docket in case from #105	
110.	Scheduling Order		Docket in case from #105	
111.	Staff Note		Docket in case from #105. Check entry restriction.	
112.	Summons Returned Executed		Docket in case from #105. Check answer date.	
113.	Notice of Appeal		Docket in case from #105	
114.	Transcripts		Docket in case from #105	
115.	Judgment		Docket in case from #105. Check term dates, flags, JS5/6 statistical information.	
	Civil Docketing Functions - SEALED	CS, CM Team		
116.	Motion to File Docs Under Seal		Docket in case from #105	
117.	Sealed Lodged Proposed Doc		Docket in case from #105. Check entry/document restrictions.	
118.	Order Granting Motion to Seal		Docket in case from #105	
119.	Edit Sealed Lodged Proposed Doc		Docket in case from #105. Check entry/document restrictions.	
120.	Sealed Document		Docket in case from #105. Check entry/document restrictions.	
121.	Sealed Document w/ multiple attachments		Docket in case from #105. Check entry/document restrictions.	
122.	Sealed Motion		Docket in case from #105. Check entry/document restrictions.	
123.	Sealed Staff Notes		Docket in case from #105. Check entry/document restrictions.	

TASK #	Subject	Assigned	Comments / Action	Testing Complete / Findings
124.	Case Sealed		Utility Event	
125.	Document Sealed		Utility Event	
	Case Assignment - Criminal	CS Intake, CRD		
126.	Criminal (Information / Indictment) - Initial Assignment (Random) *LIVE CASE(S)*		Assign saved LIVE Information / Indictment case(s)	Case #
127.	Criminal (Information) - Initial Assignment (Random) *TEST CASE*		Case number to be used for CR Information testing case	TEST Case #
128.	Criminal (MJ Case) - Initial Assignment (Direct) *LIVE CASE(S)*		Assign saved LIVE MJ Complaint / SW case(s)	Case #
129.	Criminal (MJ Case) - Initial Assignment (Direct) *TEST CASE*		Case number to be used for MJ Complaint testing case	TEST Case #
130.	Criminal - Reassignment/Recusal (Random)		Use case number from #127, Reason - Transfer w/ No Card Drawn for New Judge.	
131.	Criminal - Reassignment/Recusal (Direct)		Use case number from #129, Reason - Transfer w/ No Card Drawn for New Judge.	
132.	Void an Assignment		Void case numbers from #127 and #129. Do not create a replacement assignment.	
	Criminal Docketing Functions - Case Opening, Closing, etc.	CRD, CM Team		
133.	Open a Case - CR Case (Assigned) INFORMATIONS / INDICTMENTS *LIVE CASE(S)*		Open saved Information / Indictment cases (Case number(s) pulled #126)	Case #
134.	Open a Case - CR Case (Assigned) CR COMPLAINTS / SW *LIVE CASE(S)*		Open saved MJ Complaints / SW cases (Case number(s) pulled #128)	Case #
135.	Open a Case - CR Case (Unassigned) MJ COMPLAINT *TEST CASE*		Open TEST case (MJ Complaint, Dft Name: TEST DEFENDANT) in LIVE for test docketing. (Case number pulled #129) To be sealed and/or deleted after testing complete.	Case #
136.	Arrest		Docket in case from #135 (MJ Case)	
137.	MJ Complaint (t/w info sheet)		Docket in case from #135 (MJ Case). Check document restriction for info sheet.	
138.	Set/Reset Duty Hearings		Docket in case from #135 (MJ Case)	
139.	Minute Entry - Initial Appearance		Docket in case from #135 (MJ Case)	
140.	Language Event		Docket in case from #135 (MJ Case)	
141.	Order Setting Conditions of Release		Docket in case from #135 (MJ Case)	
142.	Bond Filed		Docket in case from #135 (MJ Case)	

TASK #	Subject	Assigned	Comments / Action	Testing Complete / Findings
143.	Open a Case - CR Case (Unassigned) INFORMATION *TEST CASE*		Open TEST case (Information, merge in test MJ case from #135, Dft Name: TEST DEFENDANT) in LIVE for test docketing. (Case number pulled #127) To be sealed and/or deleted after testing complete.	Case #
144.	Information		Docket in case from #143 (CR Case)	
145.	Waiver of Indictment		Docket in case from #143 (CR Case)	
146.	Minute Entry - Arraignment		Docket in case from #143 (CR Case)	
147.	Notice of Hearing		Docket in case from #143 (CR Case)	
148.	Minute Entry - Change of Plea		Docket in case from #143 (CR Case)	
149.	Consent to Rule 11 Plea		Docket in case from #143 (CR Case)	
150.	Plea Agreement		Docket in case from #143 (CR Case). Check document restriction.	
151.	Findings and Recommendation		Docket in case from #143 (CR Case)	
152.	Order Accepting Plea		Docket in case from #143 (CR Case)	
153.	Sentencing Summary Chart		Docket in case from #143 (CR Case). Check document restriction.	
154.	Minute Entry - Sentence w/ PSR		Docket in case from #143 (CR Case)	
155.	Judgment		Docket in case from #143 (CR Case)	
	Finance Applications, Reports, Events	Finance		
156.	CJA Merge Case			
157.	Registry Fund Review			
158.	Internet Payment System			
159.	Internet Payments Made Report			
160.	Run Applicable CM/ECF Reports			
161.	CV - Financial Notice (Other)		"Financial Documents" Event; Docket in case from #105.	
162.	CV - Notice of Receipt of Non-cash Collateral		"Financial Documents" Event; Docket in case from #105.	
163.	CV - Notice of Receipt of Passport		"Financial Documents" Event; Docket in case from #105.	
164.	CV - Notice of Release of Non-cash Collateral		"Financial Documents" Event; Docket in case from #105.	
165.	CV - Notice of Returned Check		"Financial Documents" Event; Docket in case from #105.	
166.	CV - Notice re Disbursement of Funds Deposited with the Court		"Financial Documents" Event; Docket in case from #105.	
167.	CV - Notice to Sureties by Clerk of Court		"Financial Documents" Event; Docket in case from #105.	
168.	CV - Order re Miscellaneous Items Remaining in the Court Registry		"Financial Documents" Event; Docket in case from #105.	
169.	CV - Sanctions Payment Received		"Financial Documents" Event; Docket in case from #105.	

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170.	CR - Financial Notice (Other)		"Financial Documents" Event; Docket in case from #143.	
171.	CR - Notice of Receipt of Non-cash Collateral		"Financial Documents" Event; Docket in case from #143.	
172.	CR - Notice of Receipt of Passport		"Financial Documents" Event; Docket in case from #143.	
173.	CR - Notice of Release of Non-cash Collateral		"Financial Documents" Event; Docket in case from #143.	
174.	CR - Notice of Returned Check		"Financial Documents" Event; Docket in case from #143.	
175.	CR - Notice re Exoneration of Bond and Release of Collateral		"Financial Documents" Event; Docket in case from #143.	
176.	CR - Notice re Exoneration of Bond and Release of Collateral FORM		"Financial Documents" Event; Docket in case from #143.	
177.	CR - Notice to Sureties by Clerk of Court		"Financial Documents" Event; Docket in case from #143.	
178.	CR - Order Granting Request to Change Victim Name		"Financial Documents" Event; Docket in case from #143.	
179.	CR - Order for Unclaimed Funds		"Financial Documents" Event; Docket in case from #143.	
180.	CR - Order re Miscellaneous Items Remaining in the Court Registry		"Financial Documents" Event; Docket in case from #143.	
181.	CR - Sanctions Payment Received		"Financial Documents" Event; Docket in case from #143.	
	Probation Events	CM/ECF Team		
182.	Probation - Addendum		Docket in case from #143. Check document restriction.	
183.	Probation - Criminal History Report		Docket in case from #143. Check document restriction.	
184.	Probation - Pre-Sentence Report		Docket in case from #143. Check document restriction.	
185.	USPO 12A		Docket in case from #143.	
186.	USPO 12B		Docket in case from #143.	
187.	USPO 12C		Docket in case from #143.	
188.	USPO Petition to Recall		Docket in case from #143.	
	Pretrial Events	CM/ECF Team		
189.	PS 8B		Docket in case from #143.	
190.	PS 8C		Docket in case from #143.	
191.	PS 8D		Docket in case from #143.	
	Records Management	CS, Records	Utilities - Records Management	
192.	Federal Records Center Options			
193.	Volume Tracking Options			
	Auto Docketing Interface (ADI)	CS, CM Team		
194.	Launch ADI		S:_LaunchADI	
195.	Execute ADI (LIVE)		ADK Script Selector; Confirm all CASD scripts available	
196.	Run LIVE Scripts		Run scripts for saved LIVE documents from Friday 02/28	

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197.	CEO to ADI		Execute ADI through CEO	
198.	ADI Script Builder	DSN	Update existing scripts; Create new scripts	
199.	CASD OSL 1325 to ADI		Upload CASD OSL 1325 File	
	Utilities - Your Account	All		
200.	View Your Transaction Log			
201.	Maintain Your Account			
202.	Maintain Your Email			
	Utilities - Maintain Case Data	All		
203.	Edit Case Association			
204.	Edit Case Data			
205.	Edit Case Flags			
206.	Edit Case Participants - Judges			
207.	Edit Case Participants - All Other			
208.	Edit Counts and Intervals			
209.	Edit Docket Entries			
210.	Edit Excludables			
211.	Edit Locations			
212.	Edit Schedules			
213.	Regenerate NEF			
214.	Copy Case			
215.	Delete Case			
	Utilities - Maintain Judge Statistics	CRD		
216.	Enter MJSTAR Misc Data			
217.	Edit MJSTAR Petty Offense Data			
218.	Edit Monthly Trials Misc Data			
219.	Edit Monthly Trials Time in Court Data			
	Utilities - Transfer CV Case	CS		
220.	Extract Civil Case		Use LIVE data	
221.	Prepare Transferred Case		Use LIVE data	
222.	Open Transferred Case		Use LIVE data	
223.	Remove Transfer Files		Use LIVE data	
	Utilities - Other	CM/ECF Team		
224.	Mailing Info for a Case			
225.	Mailing Labels by Case			
226.	Perform a Full Text Search			
227.	New Internet Payments Made Report			

TASK #	Subject	Assigned	Comments / Action	Testing Complete / Findings
228.	Edit Your Scheduled Reports			
229.	Edit All Scheduled Reports			
230.	Edit Scheduled Report Times			
231.	RSS Feed			
232.	CJA Exempt Toggle		Verify CJA Atty can update fee exempt status within Utility option and Query option	
	Judge Review Packet (JRP)	LLB		
233.	Access			
234.	All Functions			
235.	JRP Portlet			
	Attorney Admissions	CM/ECF Team		
236.	All Functions			
	Housekeeping	JCJ, Others		
237.	Seal all cases after testing complete			
238.	Check box to suppress JS56 and JS23 reporting			
239.	Remove reportable items from MJStar	CRD		
240.	Email chambers to disregard any NEFs over the weekend in test cases			
241.	Change banner on website when operational	I.T.		
242.	Email to all court users - NextGen CM/ECF now LIVE			
243.	Send blast email to attys - NextGen CM/ECF is now LIVE			
244.	Set atty admissions fee back to correct amount			
245.	Refund test pay.gov payment	Finance		

WEEKEND TESTING TEAM (In Addition to CASD Implementation Team):

MCRD (In Office) - Natalie (LIVE Calendar Minutes), Lilly (LIVE Log Minutes)
 MCRD (Telework) - Rhea (LIVE Log Minutes), Maria R. (LIVE Calendar Minutes)
 DCRD (In Office) - Kimmi (GPC)
 DCRD (Telework) - Jamie K. (DMS), Gaby (CAB), Jessica (JLS)
 FINANCE (In Office) - Marty
 JURY (In Office) - Irma and Michael
 I.T. - Nanette (TW)