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.sdso.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 |  |  |
|  | Establish email accounts for  testing |  |  |  |
|  | Establish PACER accounts for testing |  | Atty, CJA, and Pro Se Accts |  |
|  | Contact PACER re test accounts |  | Have accounts from #2 marked as exempt (except CJA account in order to test exempt toggle) |  |
|  | Set up user credentials for those needing CSO: public user/JENIE access |  | Create JENIE account for testing access, etc. |  |
|  | Set atty admissions fee to $1 and get active credit card to use |  |  |  |
|  | Ensure test .pdfs are available |  | I:\Everyone\\_CM-ECF COMM NOTES\Miscellaneous |  |
|  | Review expectations and format  of training |  |  |  |
|  | I.T. Applications, Reports, etc. | I.T. |  |  |
|  | Public Terminals |  | Verify 4th floor public terminals working |  |
|  | Kiosk Export |  |  |  |
|  | External Site - Court Hearings |  |  |  |
|  | External/Internal Website Links |  |  |  |
|  | CASD OSL 1325 |  |  |  |
|  | Daily Calendar |  |  |  |
|  | e-Voucher |  |  |  |
|  | Accessing NextGen CM/ECF | All |  |  |
|  | Logging into JENIE | All | <https://jenie.ao.dcn/>   * Access legacy CM/ECF menu * Access HRMIS * Access Clerk’s Office Workspace * Access NextGen Court Links |  |
|  | Workspace | JCJ |  |  |
|  | Portlets |  | Verify all portlets working as designed |  |
|  | 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 |  |
|  | Change PACER Exemption Status |  |  |  |
|  | Link a CM/ECF account to my PACER account |  |  |  |
|  | Workspace Landing Page |  | Redirect to PACER MANAGE MY ACCOUNT |  |
|  | Maintain Your Login/Password |  |  |  |
|  | Change My Role |  |  |  |
|  | Central Sign-On Administration: Public Users |  |  |  |
|  | Central Sign-On Administration: Judiciary Users |  |  |  |
|  | Central Sign-On Administration: Configuration |  |  |  |
|  | Bar Admission |  |  |  |
|  | NextGen Configuration |  |  |  |
|  | BusinessObjects Reports |  |  |  |
|  | Judge Review Packets |  |  |  |
|  | Citation Link Preferences |  | Additional Testing (See Items #92-93) |  |
|  | Toggle Tool |  |  |  |
|  | Jury | Jury |  |  |
|  | JSAP |  |  |  |
|  | Run Applicable CM/ECF Reports |  |  |  |
|  | Interpreter Reports | Interpreters |  |  |
|  | Interpreter Requirements Report |  |  |  |
|  | Interpreter Language Codes |  |  |  |
|  | System Maintenance | JCJ | Utilities - System Maintenance |  |
|  | Report Configuration |  |  |  |
|  | Edit Document Type Table |  |  |  |
|  | Unload Document Type Table |  |  |  |
|  | Generate Test Form |  |  |  |
|  | Access Control |  |  |  |
|  | System Administrator Reports |  |  |  |
|  | Update System Tables |  |  |  |
|  | Generate Announcement Notice |  |  |  |
|  | Case Assignment Reports/Updates | JCJ |  |  |
|  | Master Deck Report |  |  |  |
|  | Leave Report |  |  |  |
|  | Assignment History Report (Single) |  |  |  |
|  | Refill/Refresh a Deck |  |  |  |
|  | Edit Master Deck |  | Judge Out of Draw, Deck Parameters, etc. |  |
|  | Conflict Checking | JCJ | Utilities - Conflict Checking |  |
|  | Conflict Checking Report |  |  |  |
|  | Edit Conflict List |  |  |  |
|  | Run Conflict List Report |  |  |  |
|  | Configure Conflict Checking Report |  |  |  |
|  | Configure Judge Email Recipients |  |  |  |
|  | Statistical Reports | JCJ | Reports - National Statistical Reports |  |
|  | QC Status |  |  |  |
|  | Docket Timeliness |  |  |  |
|  | Patent Pilot Assignments |  |  |  |
|  | MJ Caseload |  |  |  |
|  | CJRA Report |  |  |  |
|  | JS-5/JS-6 Reports |  |  |  |
|  | JS-2/JS-3 Reports |  |  |  |
|  | Delayed Notice Reports |  |  |  |
|  | CASD District Court Statistical Reports |  |  |  |
|  | MJStar Report |  |  |  |
|  | JS-10 Trials Report |  |  |  |
|  | SQL Server Reporting Services | JCJ |  |  |
|  | CM/ECF SSRS Reports |  |  |  |
|  | Citation Links | CM/ECF Team | Utilities - CiteLink |  |
|  | PDF Links |  | Check LIVE orders for working links |  |
|  | Citation Display Preferences |  |  |  |
|  | Quality Control | CM/ECF Team |  |  |
|  | Enable QC Mode |  | DAR, Verify QC options working as designed |  |
|  | QC Mail Creator |  | Utilities - Quality Control |  |
|  | Civil/Criminal Reports | CM/ECF Team |  |  |
|  | Query |  |  |  |
|  | Docket Sheet |  |  |  |
|  | Docket Sheet (Orders Highlighted) |  |  |  |
|  | Multiple Docket Sheets |  |  |  |
|  | Motions Report |  |  |  |
|  | Service and Answer Report |  |  |  |
|  | Civil Cases Report |  |  |  |
|  | Civil Inventory |  |  |  |
|  | Criminal Inventory |  |  |  |
|  | Calendar Daily (Civil and Criminal) |  |  |  |
|  | Calendar Monthly (Civil and Criminal) |  |  |  |
|  | Event Restrictions Report |  |  |  |
|  | CM/ECF Links | CM/ECF Team |  |  |
|  | Links to Other Courts |  | Reports - PACER - Links to Other Courts |  |
|  | PACER Case Locator (National Index) |  | Reports - PACER - PACER Case Locator (National Index) |  |
|  | Email Addresses for Proposed Orders |  | CV/CR Events - Email Addresses for Proposed Orders |  |
|  | Forms |  | CV/CR Events - Resources - Forms |  |
|  | View On-Line Demonstrations |  | CV/CR Events - Resources - View On-Line Demonstrations |  |
|  | ECF Policies and Procedures Manual |  | CV/CR Events - Resources - ECF Administrative Policies… |  |
|  | Scenarios/Manuals |  | CV/CR Events - Resources - Scenarios/Manuals |  |
|  | CVB Reports | CVB, CM Team |  |  |
|  | CVB Disposition Docket |  |  |  |
|  | CVB Cases Report |  |  |  |
|  | CVB Offenses Report |  |  |  |
|  | CVB Audit Report |  |  |  |
|  | CVB from CMECF Audit Report |  |  |  |
|  | CVB Citation Translation Editor |  |  |  |
|  | CVB State Citation Table |  |  |  |
|  | Civil Master Case | CM/ECF Team |  |  |
|  | Master Case Submission |  | Submit a test entry in the Civil Master case; test pay.gov |  |
|  | Case Assignment - Civil | CS Intake |  |  |
|  | 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 # |
|  | Civil - Initial Assignment (Random) **\*TEST CASE\*** |  | Case number to be used for testing case | TEST Case # |
|  | Civil - Initial Assignment (Direct) |  | Pull a number to be voided (see item #103) | Case # |
|  | Civil - Reassignment/Recusal (Random) |  | Use case number from #99, Reason - Transfer w/ No Card Drawn for New Judge |  |
|  | Civil - Reassignment/Recusal (Direct) |  | Use case number from #99, Reason - Transfer w/ No Card Drawn for New Judge |  |
|  | Assignment Editor |  | Use case number from #99 |  |
|  | 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 |  |  |
|  | Open a Case - Civil Case (Assigned)  **\*LIVE CASE(S)\*** |  | Open saved paper case of case from master (Case number pulled #97) | Case # |
|  | 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 # |
|  | Complaint |  | Docket in case from #105 |  |
|  | Summons Issued |  | Docket in case from #105 |  |
|  | Motion for IFP |  | Docket in case from #105 |  |
|  | Order on Motion for IFP |  | Docket in case from #105 |  |
|  | Scheduling Order |  | Docket in case from #105 |  |
|  | Staff Note |  | Docket in case from #105. Check entry restriction. |  |
|  | Summons Returned Executed |  | Docket in case from #105. Check answer date. |  |
|  | Notice of Appeal |  | Docket in case from #105 |  |
|  | Transcripts |  | Docket in case from #105 |  |
|  | Judgment |  | Docket in case from #105. Check term dates, flags, JS5/6 statistical information. |  |
|  | Civil Docketing Functions - SEALED | CS, CM Team |  |  |
|  | Motion to File Docs Under Seal |  | Docket in case from #105 |  |
|  | Sealed Lodged Proposed Doc |  | Docket in case from #105. Check entry/document restrictions. |  |
|  | Order Granting Motion to Seal |  | Docket in case from #105 |  |
|  | Edit Sealed Lodged Proposed Doc |  | Docket in case from #105. Check entry/document restrictions. |  |
|  | Sealed Document |  | Docket in case from #105. Check entry/document restrictions. |  |
|  | Sealed Document w/ multiple attachments |  | Docket in case from #105. Check entry/document restrictions. |  |
|  | Sealed Motion |  | Docket in case from #105. Check entry/document restrictions. |  |
|  | Sealed Staff Notes |  | Docket in case from #105. Check entry/document restrictions. |  |
|  | Case Sealed |  | Utility Event |  |
|  | Document Sealed |  | Utility Event |  |
|  | Case Assignment - Criminal | CS Intake, CRD |  |  |
|  | Criminal (Information / Indictment) - Initial Assignment (Random)  **\*LIVE CASE(S)\*** |  | Assign saved LIVE Information / Indictment case(s) | Case # |
|  | Criminal (Information) - Initial Assignment (Random)  **\*TEST CASE\*** |  | Case number to be used for CR Information testing case | TEST Case # |
|  | Criminal (MJ Case) - Initial Assignment (Direct)  **\*LIVE CASE(S)\*** |  | Assign saved LIVE MJ Complaint / SW case(s) | Case # |
|  | Criminal (MJ Case) - Initial Assignment (Direct)  **\*TEST CASE\*** |  | Case number to be used for MJ Complaint testing case | TEST Case # |
|  | Criminal - Reassignment/Recusal (Random) |  | Use case number from #127, Reason - Transfer w/ No Card Drawn for New Judge. |  |
|  | Criminal - Reassignment/Recusal (Direct) |  | Use case number from #129, Reason - Transfer w/ No Card Drawn for New Judge. |  |
|  | 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 |  |  |
|  | Open a Case - CR Case (Assigned) INFORMATIONS / INDICTMENTS  **\*LIVE CASE(S)\*** |  | Open saved Information / Indictment cases (Case number(s) pulled #126) | Case # |
|  | Open a Case - CR Case (Assigned) CR COMPLAINTS / SW  **\*LIVE CASE(S)\*** |  | Open saved MJ Complaints / SW cases (Case number(s) pulled #128) | Case # |
|  | 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 # |
|  | Arrest |  | Docket in case from #135 (MJ Case) |  |
|  | MJ Complaint (t/w info sheet) |  | Docket in case from #135 (MJ Case). Check document restriction for info sheet. |  |
|  | Set/Reset Duty Hearings |  | Docket in case from #135 (MJ Case) |  |
|  | Minute Entry - Initial Appearance |  | Docket in case from #135 (MJ Case) |  |
|  | Language Event |  | Docket in case from #135 (MJ Case) |  |
|  | Order Setting Conditions of Release |  | Docket in case from #135 (MJ Case) |  |
|  | Bond Filed |  | Docket in case from #135 (MJ Case) |  |
|  | 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 # |
|  | Information |  | Docket in case from #143 (CR Case) |  |
|  | Waiver of Indictment |  | Docket in case from #143 (CR Case) |  |
|  | Minute Entry - Arraignment |  | Docket in case from #143 (CR Case) |  |
|  | Notice of Hearing |  | Docket in case from #143 (CR Case) |  |
|  | Minute Entry - Change of Plea |  | Docket in case from #143 (CR Case) |  |
|  | Consent to Rule 11 Plea |  | Docket in case from #143 (CR Case) |  |
|  | Plea Agreement |  | Docket in case from #143 (CR Case). Check document restriction. |  |
|  | Findings and Recommendation |  | Docket in case from #143 (CR Case) |  |
|  | Order Accepting Plea |  | Docket in case from #143 (CR Case) |  |
|  | Sentencing Summary Chart |  | Docket in case from #143 (CR Case). Check document restriction. |  |
|  | Minute Entry - Sentence w/ PSR |  | Docket in case from #143 (CR Case) |  |
|  | Judgment |  | Docket in case from #143 (CR Case) |  |
|  | Finance Applications, Reports, Events | Finance |  |  |
|  | CJA Merge Case |  |  |  |
|  | Registry Fund Review |  |  |  |
|  | Internet Payment System |  |  |  |
|  | Internet Payments Made Report |  |  |  |
|  | Run Applicable CM/ECF Reports |  |  |  |
|  | CV - Financial Notice (Other) |  | “Financial Documents” Event; Docket in case from #105. |  |
|  | CV - Notice of Receipt of Non-cash Collateral |  | “Financial Documents” Event; Docket in case from #105. |  |
|  | CV - Notice of Receipt of Passport |  | “Financial Documents” Event; Docket in case from #105. |  |
|  | CV - Notice of Release of Non-cash Collateral |  | “Financial Documents” Event; Docket in case from #105. |  |
|  | CV - Notice of Returned Check |  | “Financial Documents” Event; Docket in case from #105. |  |
|  | CV - Notice re Disbursement of Funds Deposited with the Court |  | “Financial Documents” Event; Docket in case from #105. |  |
|  | CV - Notice to Sureties by Clerk of Court |  | “Financial Documents” Event; Docket in case from #105. |  |
|  | CV - Order re Miscellaneous Items Remaining in the Court Registry |  | “Financial Documents” Event; Docket in case from #105. |  |
|  | CV - Sanctions Payment Received |  | “Financial Documents” Event; Docket in case from #105. |  |
|  | CR - Financial Notice (Other) |  | “Financial Documents” Event; Docket in case from #143. |  |
|  | CR - Notice of Receipt of Non-cash Collateral |  | “Financial Documents” Event; Docket in case from #143. |  |
|  | CR - Notice of Receipt of Passport |  | “Financial Documents” Event; Docket in case from #143. |  |
|  | CR - Notice of Release of Non-cash Collateral |  | “Financial Documents” Event; Docket in case from #143. |  |
|  | CR - Notice of Returned Check |  | “Financial Documents” Event; Docket in case from #143. |  |
|  | CR - Notice re Exoneration of Bond and Release of Collateral |  | “Financial Documents” Event; Docket in case from #143. |  |
|  | CR - Notice re Exoneration of Bond and Release of Collateral FORM |  | “Financial Documents” Event; Docket in case from #143. |  |
|  | CR - Notice to Sureties by Clerk of Court |  | “Financial Documents” Event; Docket in case from #143. |  |
|  | CR - Order Granting Request to Change Victim Name |  | “Financial Documents” Event; Docket in case from #143. |  |
|  | CR - Order for Unclaimed Funds |  | “Financial Documents” Event; Docket in case from #143. |  |
|  | CR - Order re Miscellaneous Items Remaining in the Court Registry |  | “Financial Documents” Event; Docket in case from #143. |  |
|  | CR - Sanctions Payment Received |  | “Financial Documents” Event; Docket in case from #143. |  |
|  | Probation Events | CM/ECF Team |  |  |
|  | Probation - Addendum |  | Docket in case from #143. Check document restriction. |  |
|  | Probation - Criminal History Report |  | Docket in case from #143. Check document restriction. |  |
|  | Probation - Pre-Sentence Report |  | Docket in case from #143. Check document restriction. |  |
|  | USPO 12A |  | Docket in case from #143. |  |
|  | USPO 12B |  | Docket in case from #143. |  |
|  | USPO 12C |  | Docket in case from #143. |  |
|  | USPO Petition to Recall |  | Docket in case from #143. |  |
|  | Pretrial Events | CM/ECF Team |  |  |
|  | PS 8B |  | Docket in case from #143. |  |
|  | PS 8C |  | Docket in case from #143. |  |
|  | PS 8D |  | Docket in case from #143. |  |
|  | Records Management | CS, Records | Utilities - Records Management |  |
|  | Federal Records Center Options |  |  |  |
|  | Volume Tracking Options |  |  |  |
|  | Auto Docketing Interface (ADI) | CS, CM Team |  |  |
|  | Launch ADI |  | S:\\_LaunchADI |  |
|  | Execute ADI (LIVE) |  | ADK Script Selector; Confirm all CASD scripts available |  |
|  | Run LIVE Scripts |  | Run scripts for saved LIVE documents from Friday 02/28 |  |
|  | CEO to ADI |  | Execute ADI through CEO |  |
|  | ADI Script Builder | DSN | Update existing scripts; Create new scripts |  |
|  | CASD OSL 1325 to ADI |  | Upload CASD OSL 1325 File |  |
|  | Utilities - Your Account | All |  |  |
|  | View Your Transaction Log |  |  |  |
|  | Maintain Your Account |  |  |  |
|  | Maintain Your Email |  |  |  |
|  | Utilities - Maintain Case Data | All |  |  |
|  | Edit Case Association |  |  |  |
|  | Edit Case Data |  |  |  |
|  | Edit Case Flags |  |  |  |
|  | Edit Case Participants - Judges |  |  |  |
|  | Edit Case Participants - All Other |  |  |  |
|  | Edit Counts and Intervals |  |  |  |
|  | Edit Docket Entries |  |  |  |
|  | Edit Excludables |  |  |  |
|  | Edit Locations |  |  |  |
|  | Edit Schedules |  |  |  |
|  | Regenerate NEF |  |  |  |
|  | Copy Case |  |  |  |
|  | Delete Case |  |  |  |
|  | Utilities - Maintain Judge Statistics | CRD |  |  |
|  | Enter MJSTAR Misc Data |  |  |  |
|  | Edit MJSTAR Petty Offense Data |  |  |  |
|  | Edit Monthly Trials Misc Data |  |  |  |
|  | Edit Monthly Trials Time in Court Data |  |  |  |
|  | Utilities - Transfer CV Case | CS |  |  |
|  | Extract Civil Case |  | Use LIVE data |  |
|  | Prepare Transferred Case |  | Use LIVE data |  |
|  | Open Transferred Case |  | Use LIVE data |  |
|  | Remove Transfer Files |  | Use LIVE data |  |
|  | Utilities - Other | CM/ECF Team |  |  |
|  | Mailing Info for a Case |  |  |  |
|  | Mailing Labels by Case |  |  |  |
|  | Perform a Full Text Search |  |  |  |
|  | New Internet Payments Made Report |  |  |  |
|  | Edit Your Scheduled Reports |  |  |  |
|  | Edit All Scheduled Reports |  |  |  |
|  | Edit Scheduled Report Times |  |  |  |
|  | RSS Feed |  |  |  |
|  | CJA Exempt Toggle |  | Verify CJA Atty can update fee exempt status within Utility option and Query option |  |
|  | Judge Review Packet (JRP) | LLB |  |  |
|  | Access |  |  |  |
|  | All Functions |  |  |  |
|  | JRP Portlet |  |  |  |
|  | Attorney Admissions | CM/ECF Team |  |  |
|  | All Functions |  |  |  |
|  | Housekeeping | JCJ, Others |  |  |
|  | Seal all cases after testing complete |  |  |  |
|  | Check box to suppress JS56 and JS23 reporting |  |  |  |
|  | Remove reportable items from MJStar | CRD |  |  |
|  | Email chambers to disregard any NEFs over the weekend in test cases |  |  |  |
|  | Change banner on website when operational | I.T. |  |  |
|  | Email to all court users - NextGen CM/ECF now LIVE |  |  |  |
|  | Send blast email to attys - NextGen CM/ECF is now LIVE |  |  |  |
|  | Set atty admissions fee back to correct amount |  |  |  |
|  | 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)