Electronic Public Access Public User Group Meeting
February 27, 2023

EPA Public User Group Members Present:

Jaime Miguel El Koury, Student, Harvard Law School
Brian R. Gallagher, Director of Content Acquisition, Thomson Reuters
Dana S. Griffin Robinson, Regional Docket Manager, Jones Day
Mark Harris, Investigative Technology Journalist, Wired, The Guardian, IEEE Spectrum, and The Economist
Michael Jay Lissner, Executive Director, Free Law Project
Benton C. Martin, Deputy Defender, Federal Community Defender Office, Detroit, Mich.
Roksana D. Moradi-Brovia, Partner, RHM Law
Lindsay A. Owen, Assistant Managing Clerk, White & Case
Janet Peros, Senior Research Analyst, Paul, Weiss, Rifkind, Wharton & Garrison
Anna Liese Price, Senior Legal Reference Librarian, Law Library of Congress
Ken Rodriguez, Reference and Intellectual Property Law Librarian, George Washington University Law School
Blayne V. Scofield, Senior Product Manager/Dockets, Bloomberg Industry Group

Administrative Office of the United States Courts

Stephen Grant	Group Chair and Division Chief, Programs Division, Court Services Office
James Cartwright	Branch Chief, PACER Development Branch, Enterprise Operations Center
Anna Garcia	Branch Chief, PACER Support Branch, Enterprise Operations Center
Ty Manuel	Program Analyst, Case Management Branch, Court Services Office
Linda Melchor	Program Analyst, EPA section, Court Services Office
Aicha Campbell	Program Analyst, EPA section, Court Services Office
Michelle Gardner	Attorney Advisor, EPA section, Court Services Office
Michael Djan	Management Analyst, EPA section, Court Services Office
Jaculine Koszczuk	Public Information Officer, Office of Public Affairs

Meeting Summary

Stephen Grant, Public User Group chair and Division Chief within the Court Services Office, welcomed the Electronic Public Access (EPA) Public User Group members and called the meeting to order.

Unified Search Project

The AO provided a status update on the unified search project, which is an initiative to improve PACER search and reporting functionality. The goal of the project is to provide a modern, intuitive, user-friendly search interface, allowing the user to easily search across the federal courts for publicly available case data, documents, and docket entries. The AO is currently preparing for the solicitation process.

Review of Interview Findings

EPA Public User Group members were invited to participate in individual interview sessions conducted between November 28, 2022, and January 12, 2023, by the Administrative Office of the U.S. Courts' (AO) User Research Coordinator, Ty Manuel. The semi-structured interviews were conducted virtually and included approximately 12 questions. The members were given the opportunity to openly share their opinions during their interviews.

Throughout the interviews, several themes and needs emerged. Members share many of the same general impressions as those provided by the previous EPA Public User Group members and PACER survey respondents. Those themes included the views that while PACER is a trusted and valuable source of information, it has an outdated appearance and limited search functionality and usability. Below are highlights of other themes:

- *Search*: Users predominantly use Advanced Search; the amount of information a user knows about a case determines user behavior and success; and the addition of full text search of document would be "groundbreaking."

- *Search Results*: Too many results are returned, making it hard to find relevant matches; better categorization of results is needed; and being able to preview a document would help users determine if it was the correct document.

- *Search Filters*: The ability to filter by judge was widely requested, in addition to filters by document type (e.g., motions, court orders, search warrants), attorney, and law firm.

- *Case Alerts/Tracking*: Many expressed interest in the ability to follow cases and get updates when specific events occur (e.g., new order filed, document sealed/unsealed, etc.). There was also a suggestion to allow pre-payment for updates when documents are added to the docket and access to those documents.

- *Consistency of Data*: While many users understood why there may be variations between courts, most expressed frustration with data inconsistency (e.g., naming conventions, spelling of names, file size limit, rules for uploading files, etc.).

- *Human User and Data Consumer*: There are two very distinct PACER users, human users and data consumers/miners, that use the system in different ways and for different purposes.

- *API*: Data consumers/aggregators requested the development of an application programming interface (API) to allow for easier access to and consumption of data. Many believe system performance for human users could be improved by removing the resource load some data mining efforts may cause on the system.

One member asked about what user research has been conducted regarding search results and use cases specific to the needs of the various PACER users that goes beyond best practices for search engines. The AO indicated that this group would be invited to participate in future user research sessions that will focus on defining search result use cases and other requirements.

One member reiterated that moving the data miners off the human user interface will improve the human user experience. Another member suggested that the APIs provided should be easy to use by anyone (e.g., academic researchers) and not just the big tech companies. The AO responded that it is working to address the needs of all its users.

One member asked if there was a master list of all the requirements being considered that could be shared with the Group. The AO indicated that it is in the process of compiling a master list of requirements and would share with the group in the future.

Next Steps

The AO plans to conduct another user research session in the coming weeks to elicit case preview requirements.