

**Electronic Public Access Public User Group Meeting
May 11, 2023**

EPA Public User Group Members Present:

Jaime Miguel El Koury, Student, Harvard Law School
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

Administrative Office of the United States Courts

Stephen Grant	Group Chair and Chief, Programs Division, Court Services Office
James Cartwright	Chief, PACER Development Branch, Enterprise Operations Center
Anna Garcia	Chief, PACER Support Branch, Enterprise Operations Center
Nicole Holmes	Chief, National Programs Branch, Court Services Office
Ty Manuel	Program Analyst, Case Management Branch, Court Services Office
Sukanya Somasundaram	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

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 Update

The AO provided a status update on the unified search project, which is an initiative to replace 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 continues

working through the procurement process. On April 14, the [draft solicitation for the Unified Search project](#) was published. It is expected that the final solicitation will be released in a few weeks.

Human-Centered Design Framework

Sukanya Somasundaram, one of the Product Owners for the Unified Search project, provided the Group with an overview of the Human-Centered Design (HCD) framework being adopted for the project. The HCD framework places the end users' needs at the center of the development process. This will help the AO ensure that the Unified Search product is developed with a high degree of usability and user experience. This also requires regular engagement with end users to help refine product requirements and validate them (e.g., assist with use cases). As a result, members are expected to represent the interests of their peers (user type group), help maintain the focus on the product functionality and value throughout the project, and advocate for the needs and preferences of the end users with the goal to improve user experience.

Case Number Formatting

Ty Manuel, User Research Coordinator, presented a case number formatting proposal for use in the new search system. The case number is the main identifier for any federal case. It always contains the year in which the case was initially filed; a number ranging in length from 1 to 5 digits but is not unique and varies in format; and bankruptcy and district case numbers may also contain other attributes (e.g., case type, office code, judge initials, etc.). In the new system, the case number should be presented in a clear, consistent, and standard format, so that users have a cohesive user experience. This will be accomplished by enhancing the existing case number format used in the PACER Case Locator (i.e., **Office:YearCaseTypeCaseNumber - 0:2010op00289**) with the following minor adjustments: adding hyphens for easy readability, removing office for Appellate case numbers, adding judge initials for district and bankruptcy cases, and adding defendant number for district criminal cases. The enhanced case number format will be **Office** (As applicable): **Four-digit year-case type-case number-judge initials** (BK & DC) **-defendant number** (DC). For example:

- Appellate: 2010-op-00289
- Bankruptcy: 2:1988-bk-01906
- District: 1:2010-cr-00515-DJJ-MSK-1

Members discussed the proposed enhancements to the case number formats. A member questioned the inclusion of judges' initials for BK and DC cases and the value of it. The AO responded that it is something PACER users have requested in the past. Other Group members expressed their support of the addition by stating that adding judge initials will help make searching easier for all users, including pro se users, and is something that is already being provided by third-party services. It was asked why the use of a four-digit year instead of a two-digit year. The AO explained that the use of the four-digit year was decided with the future in mind. Members also suggested that the AO provide information about how the new case number

format is created (including definitions for case type codes) on the PACER website so that users understand it better.

Members were informed that case number standardization in the CM/ECF systems is not in scope of this effort as that will be reviewed as part of the larger Case Management Modernization initiative.

Introduction to Case Preview

Next, Ty introduced Case Preview to the Group. Case Preview will be a feature in the new search system that provides a snapshot of a case. It will provide key case information upfront to help users determine if the desired case match was found, as well as provide most recent activity in the case without having to view the full docket report. This will be a cheaper alternative to viewing the full docket report but does not replace the existing docket report. Users will be able to access both the Case Preview and full docket report from the search results page.

Members were informed that in the next couple of weeks they will be provided with an assignment to help further refine the requirements for Case Preview. One member asked what data would be provided on Case Preview. The AO responded that that information would be shared as part of the assignment and what they will be asked to provide input on. A member asked if this was something that could be made free, and the AO responded that discussions regarding the fee are not in scope of the Group's charter. Another member asked if they would be forced to pay for the Case Preview to get to the full docket report. The AO explained that if users want to go directly to the docket report from the search results page, they will be able to do so, and users would not be required to view Case Preview first. A member also asked if the data in Case Preview would have a 24-hour delay, and the AO responded that the data provided would be near real-time. Finally, it was asked if members were allowed to reach out to their peers to assist with completing the homework assignment. The AO responded that it would need to follow up on the request and would include that information in the instructions of the assignment.

Next Steps

The AO will send out an assignment to help refine Case Preview requirements to the members in the coming weeks and will also schedule a user research session after the completed assignments have been submitted to discuss results.