

Electronic Public Access Public User Group Meeting December 19, 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
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

Linda Melchor	Program Analyst, EPA Section, Court Services Office
Sukanya Somasundaram	Program Analyst, Case Management Branch, Court Services Office
Michael Djan	Management Analyst, EPA Section, Court Services Office
Jaculine Koszczuk	Public Information Officer, Office of Public Affairs
Lucien Adam	Chief Deputy Clerk, Southern District of Ohio

Meeting Summary

Linda Melchor, Product Owner and Program Analyst, AO 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—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 public users to easily search across the federal judiciary for near real-time court data in cases, documents, and docket entries.

The members were thanked for completing the Case Preview Data Requirements Refinement Worksheet. Their feedback will inform requirements for the Case Preview feature in the new PACER interface. Due to the amount of feedback and questions, the Group's information will be reviewed over multiple sessions covering Appellate, Bankruptcy Adversary Proceedings,

Bankruptcy, District-Civil and District-Criminal case previews as well as new fields/data elements suggested. The review will start with Appellate Case Preview.

Overview of Case Preview

The group was provided with a quick refresher on Case Preview, a feature that will provide a snapshot of a case in the new PACER interface. The snapshot will provide key case information to help users determine immediately whether the desired case was found and view the most recent activity in the case without having to scroll through a full docket report. This will be a less expensive way to view case information but will not replace the full docket report. Users will be able to access the Case Preview and the full docket report from the search results page.

Case Preview Feedback*

A Product Owner for the Unified Search Project presented an analysis of the Group's feedback on the Appellate Case Preview feature. Members discussed the analysis and provided additional information to the AO. In this way, the AO obtained a deeper understanding of all Group members' needs whether individuals, law firms, automated script users, or academics. These user views are critical to the modernization effort.

**Details of this discussion will be posted after the Unified Search Project request for proposals is awarded.*

Q&A

One member asked whether all circuits would adopt the Appellate Case Management System (ACMS) and what the relationship is with the upcoming PACER interface redevelopment. The AO explained that the new PACER interface will provide access to all federal judiciary court databases.

Next Steps

The AO will schedule up to four more user research sessions to review findings for Bankruptcy Adversary Proceeding, Bankruptcy, District-Civil and District-Criminal case previews, and new fields/data elements suggested.