

Commonwealth of Massachusetts

THE APPEALS COURT



**CLERK'S GUIDE TO
ELECTRONIC BRIEFS**

VERSION 3
NOVEMBER 2024

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INTRODUCTION

Welcome to the Massachusetts Appeals Court. This Guide to Electronic Briefs is part of our continuing mission to provide the public with assistance regarding appeals and electronic filing. This guide is intended to demonstrate processes you may use when creating a portable document format (PDF) version of your brief and record appendix for submission through the [eFileMA](#) system. We hope you find it helpful.

This guide demonstrates:

- How to convert your brief and addendum to PDF.
- How to combine PDF documents in your brief, addendum, and appendix.
- How to make scanned materials OCR searchable.
- How to quickly edit small mistakes in a PDF.
- How to add or edit pagination, headers, and footers in a PDF.
- How to bookmark and create internal links in a PDF.

Please keep in mind the methods presented in this guide do not constitute endorsement of any particular products, but merely suggestions based on common programs. The concept and content of this guide was inspired by the Supreme Court of Texas's Guide to Creating Electronic Appellate Briefs. For further assistance, please review the [Appeals Court Guide to Appellate Briefs and Record Appendix](#), the [Appeals Court Guide to Electronic Filing](#), and other Appeals Court resources.

ELECTRONIC FILING AT THE APPEALS COURT

The Appeals Court's e-filing program is governed by Massachusetts Appeals Court (M.A.C.) [Rule 13.0](#). Although self-represented parties are allowed, but not required to e-file, we encourage all parties to e-file all relevant documents to the court.

To e-file, you must register at eFileMA.com, an e-file platform maintained by Tyler Technologies, Inc., the judicial branch's third-party vendor. If you need guidance on registering or setting up a payment account, the vendor provides helpful [training videos](#) on its self-service page.

As required by M.A.C. [Rule 13.0](#), all attorneys with cases pending in the Appeals Court must register for an account with eFileMA.com, maintain their name and address on the eFileMA.com "Public List," and use eFileMA.com to electronically file the following documents:

- All filings in criminal panel cases that are public or partially impounded.
- Briefs and appendices in civil panel cases that are public or partially impounded.
- All docketing statements in civil or criminal cases that are public or partially impounded.
- All motions and letters filed after panel assignment in civil or criminal cases that are public or partially impounded.
- All filings on the Single Justice docket in public or partially impounded cases.

Attorneys may e-file any documents not identified in the list above.

For more information on e-filing, creating an e-file account, requirements for filing into new and existing cases, and paying or waiving filing fees, please visit the Appeals Court's website at [Electronic Filing at the Appeals Court](#). In addition, Tyler Technologies, Inc., the judicial branch's third-party vendor, also provides guidance on its website at odysseyfileandserve.

HELPFUL RESOURCES

- **eFileMA.com Appeals Court Electronic Filing Platform**
<http://www.efilema.com/>
- **Appeals Court Guide to Electronic Filing**
<https://www.mass.gov/guides/electronic-filing-at-the-appeals-court>
- **Appellate Electronic Filing Tips for the 2020's, Boston Bar Journal (Feb. 2020)**
<https://bostonbar.org/journal/appellate-electronic-filing-tips-for-the-2020s-2/>
- **Appeals Court Guide to Appellate Briefs and Record Appendix**
<https://www.mass.gov/service-details/appeals-court-briefs>
- **Appeals Court Checklist for Preparing a Brief and Record Appendix**
<https://www.mass.gov/doc/checklist-for-preparing-a-brief-and-record-appendix-appeals-court/download>
- **Appeals Court Guide to Creating PDFs with Bookmarks and Internal Links**
<https://www.mass.gov/service-details/how-to-create-pdfs-with-bookmarks-and-internal-links>
- **Appeals Court Rule 13.0**
<https://www.mass.gov/appeals-court-rules/appeals-court-rule-130-electronic-filing>
- **Appeals Court Rules**
<https://www.mass.gov/law-library/massachusetts-appeals-court-rules>
- **Massachusetts Rules of Appellate Procedure**
<https://www.mass.gov/law-library/massachusetts-rules-of-appellate-procedure>
- **Supreme Judicial Court Rule 1:25: Massachusetts Rules of Electronic Filing**
<https://www.mass.gov/supreme-judicial-court-rules/supreme-judicial-court-rule-125-massachusetts-rules-of-electronic>
- **Frequently Used Forms**
 - [Appeals Court Forms](#)
 - [Civil Appeals Entry Form](#)
 - [Civil Docketing Statement](#)
 - [Criminal Docketing Statement](#)
 - [Certificate of Service](#)
 - [Certificate of Compliance](#)

TOOLS AND BASIC STEPS TO CREATE ELECTRONIC BRIEFS.

NECESSARY TOOLS

Word Processor System

Create your brief in a word processing system, such as Microsoft Word, where you can draft, edit, finalize, and save your brief as a PDF.

Adobe Acrobat Standard or Pro

Your brief must be Optical Character Recognition (OCR) searchable as required by the Appeals Court Rules. You can use Adobe Standard or Pro to create, combine, and convert PDFs to OCR searchable. Please note that you will need Adobe Pro to make scanned documents OCR searchable, add internal links, or redact information in a PDF.

Scanner

You may not scan your brief. Furthermore, you shall prepare the addendum and record appendix in an electronic format wherever possible. You may, however, scan certain required documents available only in hard copies for submission. When applicable, please set your scanner in black and white at 200 dpi to minimize file size. Only relevant images, such as color photographs used as an exhibit, may be scanned in color. See [S.J.C. Rule 1:25, Rule 10\(c\) & 10\(d\)](#).

BASIC STEPS

STEP 1: Convert your brief from a word document to a PDF.

STEP 2: Convert your addendum to a PDF.

STEP 3: Combine your brief and addendum into one PDF.

STEP 4: Convert your record appendix to a PDF separate from your brief and addendum.

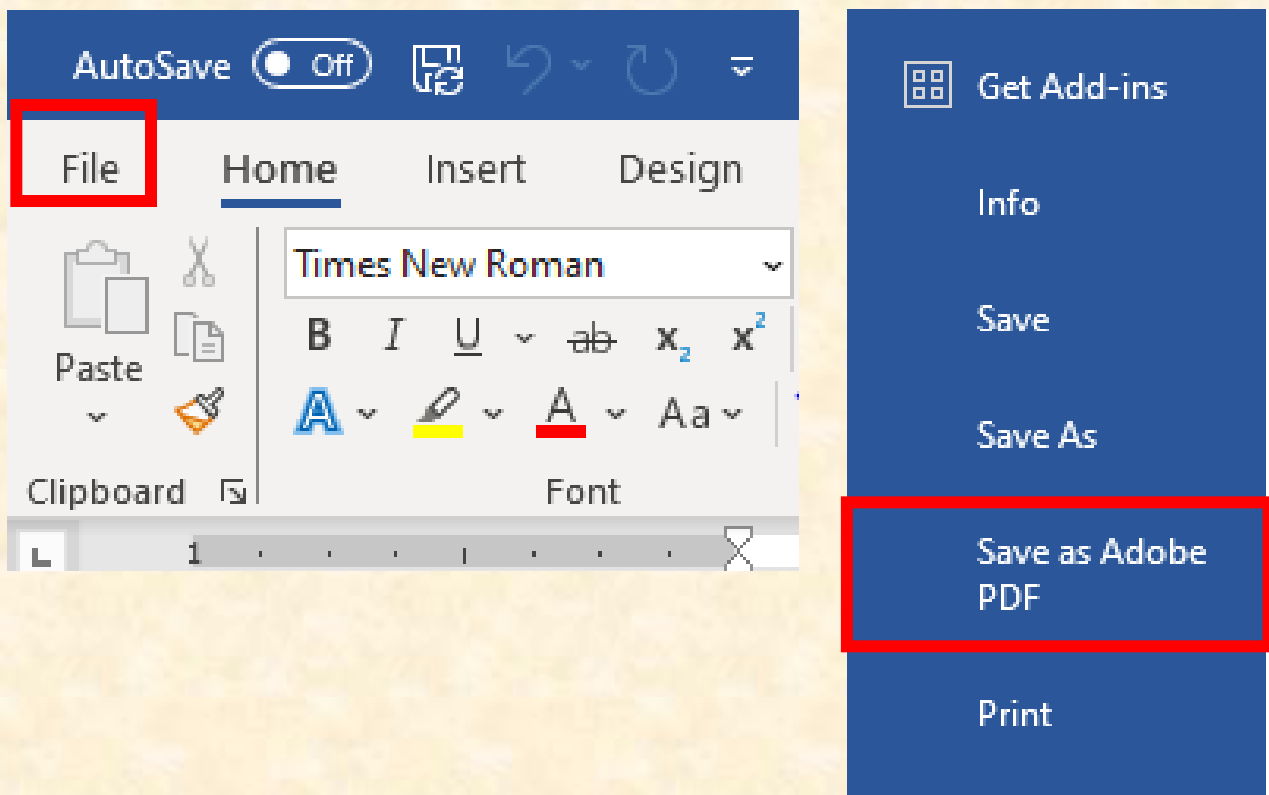
STEP 5: Make scanned materials OCR searchable using software such as Adobe Acrobat.

STEP 1: CONVERT YOUR BRIEF FROM A WORD DOCUMENT TO A PDF.

Do **NOT** print your brief and scan the printed copy. Convert your brief to a PDF directly from your word processing software or using Adobe Acrobat. Please see below different methods of converting your brief from a word document to a PDF.

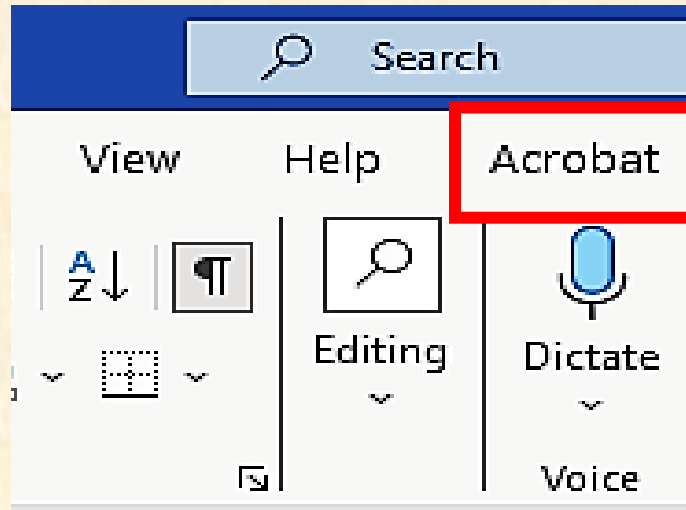
OPTION I: MICROSOFT 365 (WORD)

1. Select **File** at the top left corner.
2. Choose **Save As Adobe PDF**.
3. Select **Save**. Make sure to save a copy in Word as well.

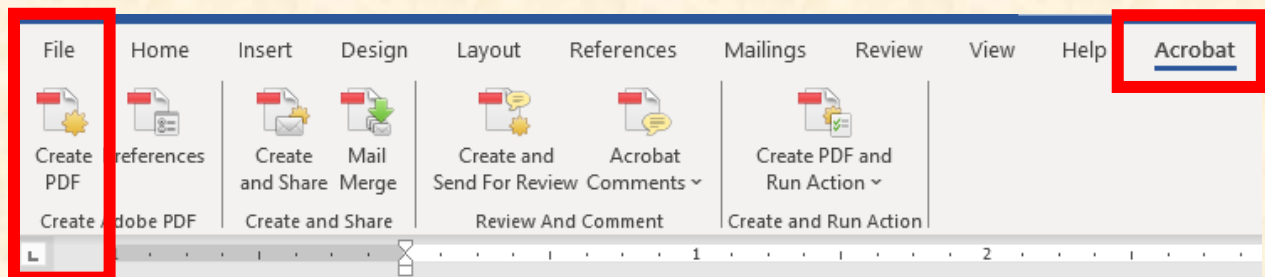


Adobe Acrobat Ribbon in Word

1. If you already installed Adobe Acrobat, the [Acrobat](#) button will appear either next to [View](#) or [Help](#) depending on the Word version. Please follow the steps below to convert a word document to a PDF using the Adobe [PDFMaker](#) ribbon.
2. Choose [Acrobat](#) in the ribbon at the top of the page.



3. Choose [Create PDF](#) in the [Acrobat](#) menu.

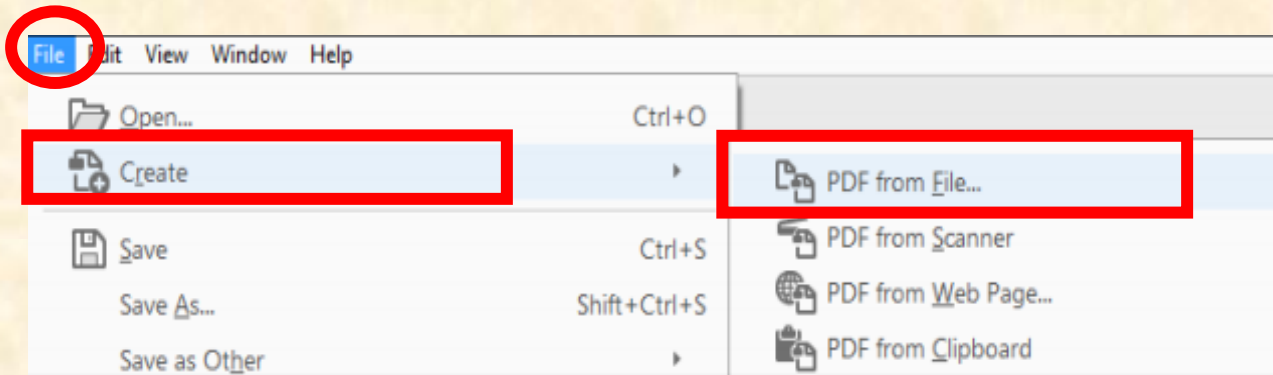


4. Select [Save](#).

OPTION II: ADOBE ACROBAT STANDARD & PRO

Option I

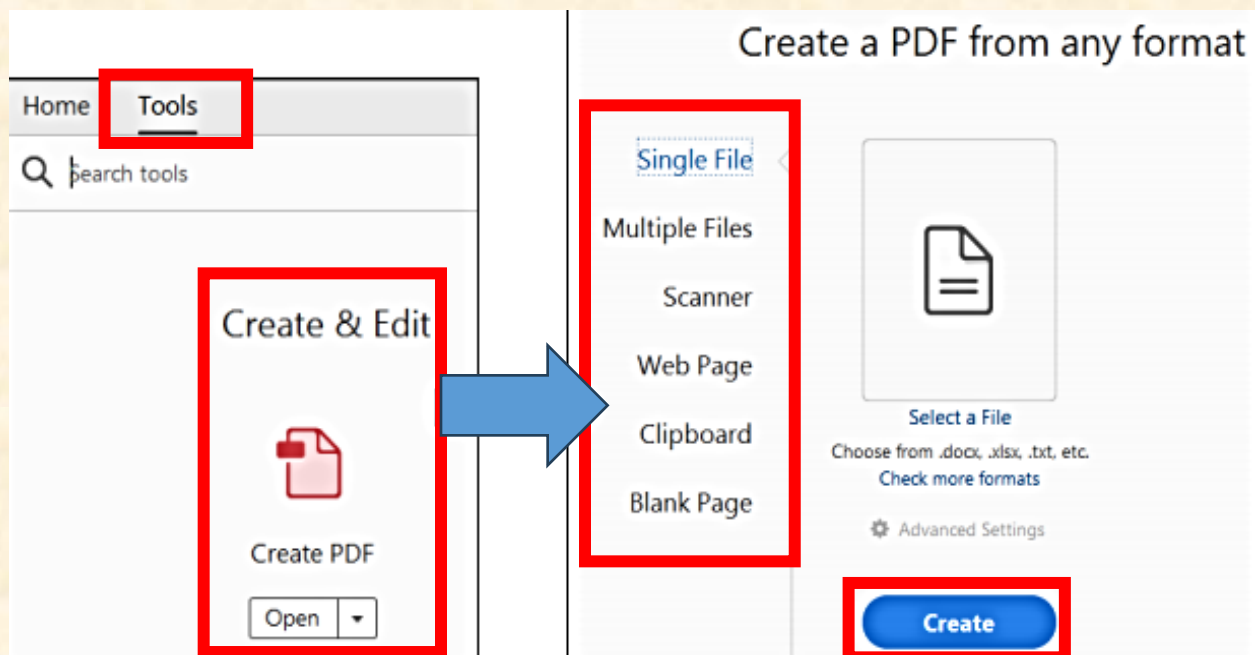
1. Choose File, select Create, and then select PDF from File.



2. Locate and choose the document you wish to convert and then select Open.

Option II

1. Choose Tools and select Create PDF.
2. Select a file from the side bar where you can choose from Single File, Multiple Files, Scanner, Web Page, Clipboard, or Blank Page.
3. Select Create and save the PDF by choosing File and then selecting Save as.



STEP 2: CONVERT YOUR ADDENDUM TO A PDF.

Your brief must include an addendum containing certain required items. See Mass. R. A. P. 16 (a) (13) and 16 (b) (3). Please do not scan addendum materials unless no electronic versions are available to you. If you scan both your brief and addendum, the scanned file size may be too large for the Appeals Court's eFiling system. In addition, electronic documents tend to be more legible compared to scanned copies. Please ensure your scanned document is OCR searchable (as described in [Step 5](#)) if you must scan a document.

OBTAIN ELECTRONIC COPIES OF LEGAL AUTHORITIES

ONLINE.

Many Massachusetts legal authorities can be located online. Please visit Mass.gov at <https://www.mass.gov> for Massachusetts General Laws and recent court decisions. You can save webpages as PDFs instead of printing and scanning the webpages.

Online Resources

- Massachusetts General Laws
<https://malegislature.gov/laws/generallaws>
- Massachusetts General Laws, Session Laws, & Bills
<https://www.mass.gov/massachusetts-general-laws-session-laws-bills>
- Massachusetts Laws by Subject
<https://www.mass.gov/topics/laws-by-subject>
- Massachusetts Court Cases
<https://www.mass.gov/topics/massachusetts-court-cases>
- M.A.C. Rule 23.0 Summary Dispositions (formerly Rule 1:28)
<https://128archive.com/>
- Massachusetts Trial Court Law Libraries
<https://www.mass.gov/orgs/trial-court-law-libraries>
- Social Law Library at the John Adams Courthouse
<https://sociallaw.com/>

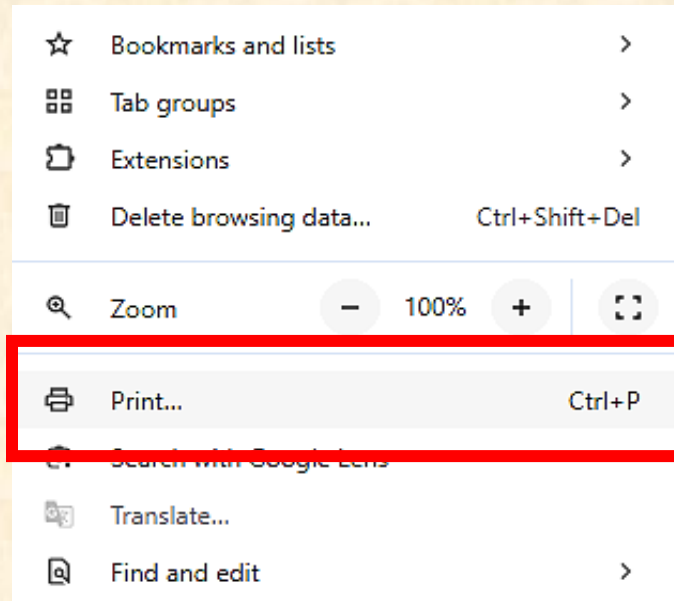
Law Libraries

- Massachusetts Trial Court Law Library Locator
https://www.mass.gov/orgs/trial-court-law-libraries/locations?_page=1
- Social Law Library at the John Adams Courthouse <https://www.sociallaw.com/>

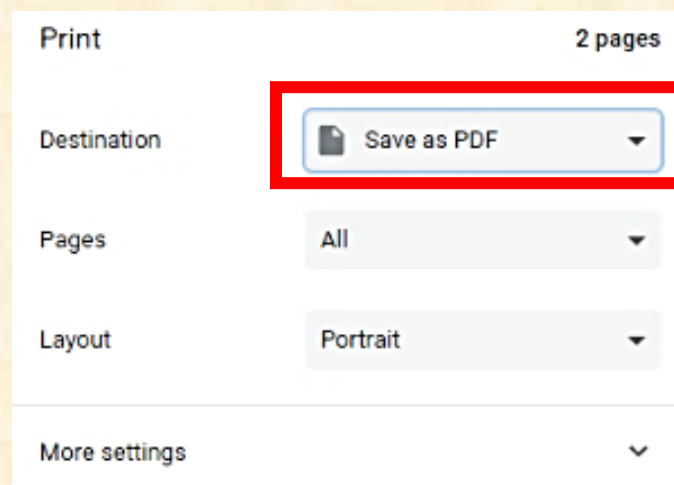
CONVERTING WEB PAGES TO PDFs

Google Chrome

1. Navigate to the web page you wish to convert to PDF.
2. Select More Options, the three dots in the top right corner of the browser, and then select Print.

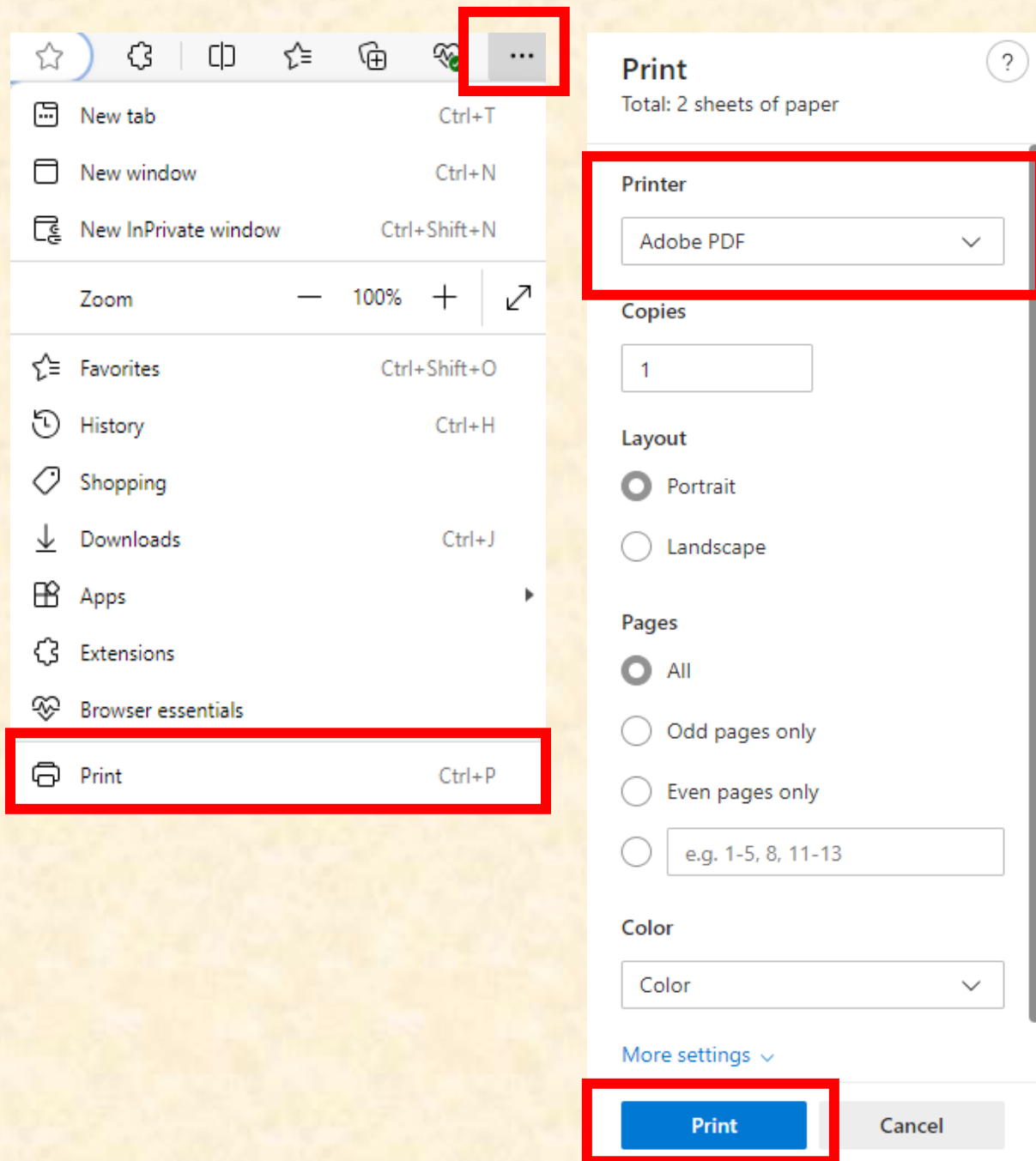


3. In the Destination section, choose Save As PDF and then select Save.



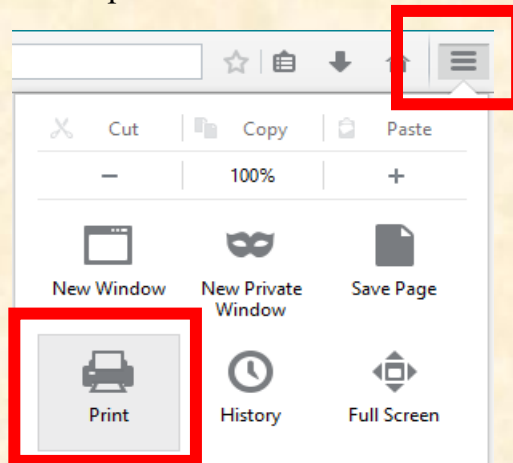
Microsoft Edge

1. Navigate to the web page you want to save as a PDF document.
2. Select Settings and More, the three dots in the top right corner of the browser.
3. Choose Print, change the Printer setting to Adobe PDF, select Print, and then select Save.

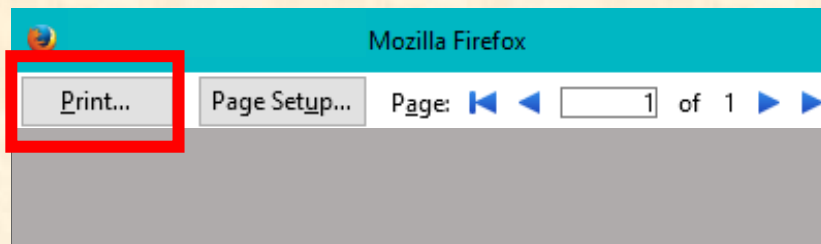


Firefox

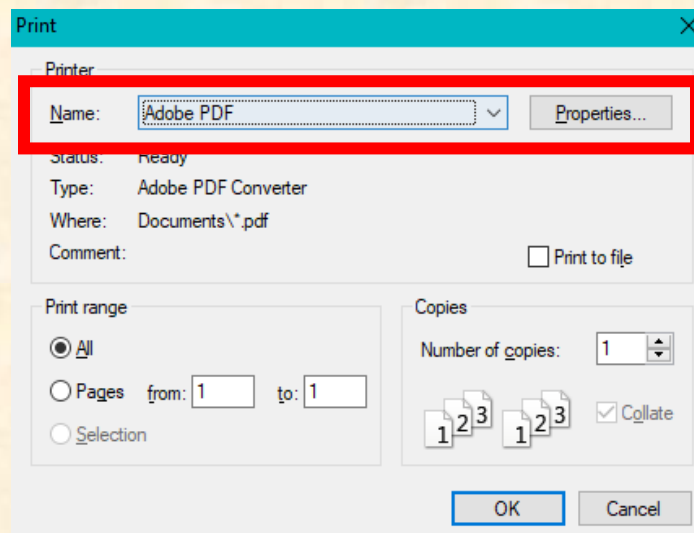
1. Navigate to the web page you want to save as a PDF document.
2. Select the three-bar symbol at the top right corner of the browser.
3. Select the Print icon in the dropdown menu.



4. When the Print Preview appears, select Print at the upper left corner of the screen.



5. Under the Name dropdown, select Adobe PDF or Microsoft Print to PDF.



USE ONLINE RESOURCES TO DOWNLOAD LEGAL AUTHORITIES AND RESOURCES AS PDFs.

Per Massachusetts Rules of Appellate Procedure Rule [16 \(a\) \(13\)](#), a brief **MUST** include an addendum which contains:

1. a table of contents listing each item contained therein and the page on which it begins;
2. any appealed judgment or order;
3. copies of constitutional provisions, statutes, rules, regulations, or relevant parts thereof, as in effect at the relevant time, consideration of which is required for determination of the issues presented;
4. copy of any unpublished decisions cited in the brief; and
5. outline plans in cases where geographical facts are important unless appropriate plans are reproduced in the printed record or record appendix. The outline plan should be capable of reproduction on a single page of the printed law reports.

PDF versions of statutes and other court rules are available for download from the [Massachusetts Legislature webpage](#), the [Massachusetts Rules of Court and Standing Orders website](#), and from common legal research databases such as Westlaw, Lexis, HeinOnline, or Fastcase. Follow the instructions below to download legal resources as PDFs from the abovementioned sources.

If you need assistance accessing or utilizing these resources, consider visiting a [Massachusetts Trial Court Law Library](#) near you.

Depending upon the source, you can choose [Print](#) and [Print to PDF](#) or [Save to PDF](#).

Saving to PDF with Westlaw

On a Public Computer:

1. Select the envelope icon in the top right corner of the document you wish to download.
2. Select [Email](#) to bring up the dialog box that allows you to email a copy of the case to yourself. Make sure the [Format](#) dropdown is set to [PDF](#).
3. Under [Layout and Limits](#) tab, uncheck the [Dual column layout for Case](#) so that the document is easier to read.
4. Select [Email](#), and a PDF copy of the document will be sent to the email entered in the [Recipient](#) tab.

On a Private Computer:

1. Navigate to the envelope icon and select [Download](#).
2. Ensure [Format](#) is set to [PDF](#), then select [Download](#).
3. Select [Download](#) when the [Ready for Download](#) dialog box appears.

Saving to PDF with Lexis:

On a Public Computer:

1. Select the envelope icon at the top left corner of the document you wish to download.
2. Select [Full Document](#) under [Email](#) and make sure the [File Type](#) is set to [\(.PDF\)](#).
3. Under [Content-specific Options](#) tab, select [Single](#) under [Number of Columns](#) so that the document is easier to read.
4. Enter your email and select [Submit](#).

On a Private Computer:

1. At the top left corner of the document, select the arrow icon to [Download](#).
2. Select your desired document settings and select [Download](#).

Saving to PDF with HeinOnline:

On a Public Computer

1. Select the envelope icon at the top left corner of the document you wish to download.
2. Enter your information in the relevant fields then select [Email](#).

On a Private Computer

1. Select the Adobe Acrobat icon at the top left corner which will download the document to your computer as a PDF.

Saving to PDF with Fastcase:

1. Select [Email](#) at the top of the document you wish to download.
2. Enter your information then select [Send Email](#).

Saving to PDF with Fastcase:

1. Select [Email](#) at the top of the document you wish to download.
2. Enter your information in the relevant fields then select [Email](#).

SCANNING PDF USING ADOBE ACROBAT PRO

If your scanner is connected to a computer with Adobe Acrobat Pro, you may be able scan a document using Adobe to make it OCR-searchable. This feature is not available for Adobe Acrobat Standard.

1. Choose [Create](#) in Adobe, select [PDF from Scanner](#) and then [My Custom Settings](#).
2. Under [Color Mode](#), select [Black and White](#).
3. Under [Resolution](#) select [200 dpi](#).
4. Under [Output](#), select [Recognize Text \(OCR\)](#) and then scan your document.
5. Be sure to select [Save Settings](#) at the top right corner of the screen to maintain these settings as your default.

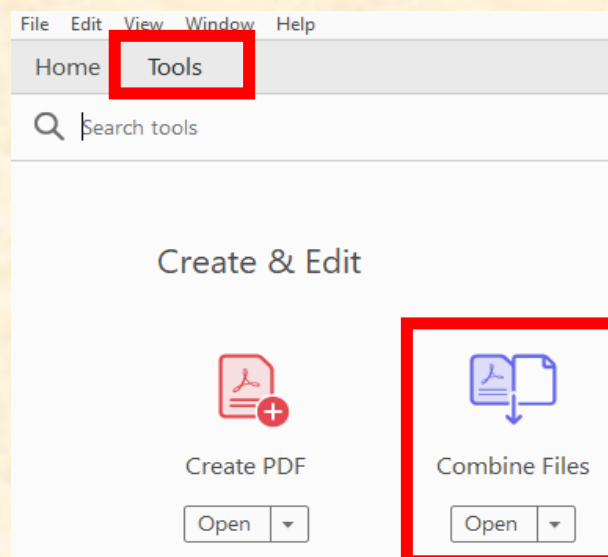
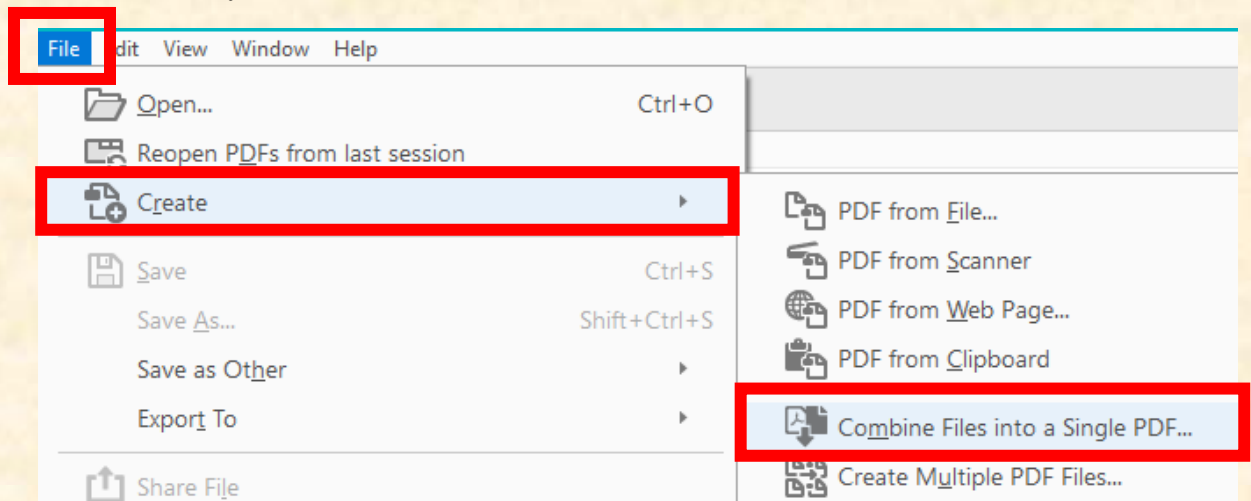
STEP 3: COMBINE THE BRIEF AND ADDENDUM INTO ONE PDF.

The Brief and Addendum must be submitted as a single document. See Mass. R. A. P. 16 (a) (13). Page numbers shall appear in the margin with the cover paginated as page 1 and pages thereafter numbered consecutively through the last page, including any addendum. See Mass. R. A. P. 20 (a) (4) (A).

ADOBE ACROBAT STANDARD & PRO

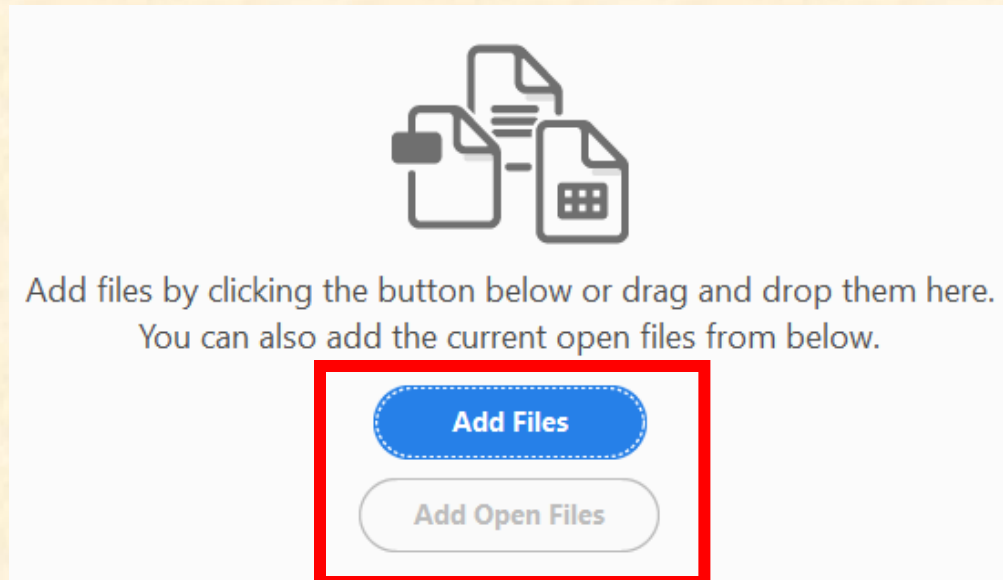
1. Choose File, choose Create and select Combine Files into a Single PDF.

Alternatively, choose Tools and select Combine Files.

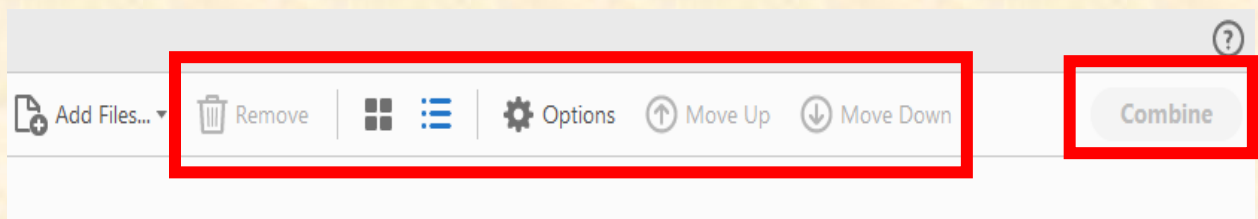


Clerk's Guide to Electronic Briefs

2. Select [Add Files](#) to select files from your computer. If the documents you wish to combine are currently open, you can select [Add Open Files](#).



3. In the dialog box, highlight all the files you wish to combine and select [Open](#). The files can be a mix of formats (i.e. Word, Excel, PDF, etc.).
1. To arrange the files into your desired order, use the [Move Up](#) or [Move Down](#) buttons in [Thumbnail View](#), or drag and drop the file names [List View](#).
4. Use [Add Files](#) to add additional files if needed.
5. Select [Combine](#) in the dialog box and save the combined file.



STEP 4: CONVERT APPENDIX INTO A SEPARATE PDF.

The contents of the record appendix are governed by [Mass. R. A. P. 18](#) and the format by [Mass. R. A.P. 20 \(a \)\(5\)-\(6\)](#). **You must submit your appendix as a separate PDF than your Brief. DO NOT attach your appendix to your brief or any motion.** An Appendix will be rejected if it is nonconforming, and you will be required to refile your brief and appendix.

CREATION AND SIZE OF APPENDIX VOLUME(S).

Documents larger than 50 MB cannot be e-filed and must be divided into separate volumes each smaller than 50 MB. If you have more than one volume appendix, you must indicate such volume is one of multiple volumes (e.g. "Volume I of II") on the cover of each volume and under the "Document Description" field in eFileMA.com if you choose to efile. You should verify your appendix's file size prior to applying page numbers to your appendix, finalizing your appendix's table of contents, and starting your brief citations.

- ◆ Each volume of the appendix shall be designated by a roman numeral on the cover and must be separately paginated beginning with the cover as page 1.
- ◆ All subsequent pages within each volume, including the table of contents, must be numbered consecutively.
- ◆ The first volume of the appendix shall include a complete table of contents referencing all volumes of the appendix, and each individual volume shall include a table of contents for that volume.
- ◆ Do **NOT** continue page numbers across multiple volumes. Start each volume at page 1. Remove any blank pages in your appendix before numbering, if possible.

Clerk's Guide to Electronic Briefs

- ◆ Any remaining blank pages must be marked as "Intentionally Blank," and must have a page number consecutive with the previous page number to maintain the consecutive numbering.
- ◆ For appendices filed electronically, the page numbers on each volume must match the page numbers displayed in the PDF reader software.
- ◆ When your brief cites to a specific document in your appendix, your citation must include both the volume number and page number of the document (e.g. "App. I at 155" or "R.A. II at 49").
- ◆ You may need to submit multiple envelopes to e-file all of your appendices if the overall PDF file size is too large. To minimize file size, you must configure your scanners to scan text documents at 200 dpi and in black and white rather than in color.
- ◆ You must verify the legibility and orientation of all pages in PDF documents before e-filing them.
- ◆ Any reproduction of an exhibit in an appendix should be of sufficient resolution and of original color if relevant to ensure an accurate representation of the exhibit. For example, you must reproduce a colored photograph marked or admitted as an exhibit in the trial court in color. However, you do not need to reproduce trial court color-coded forms.

SCANNING DOCUMENTS IN THE APPENDIX

If you need to scan certain materials such as a copy of the notice of appeal or a copy of the judgment to include in your appendix, please make sure the text of the scanned document is OCR searchable.

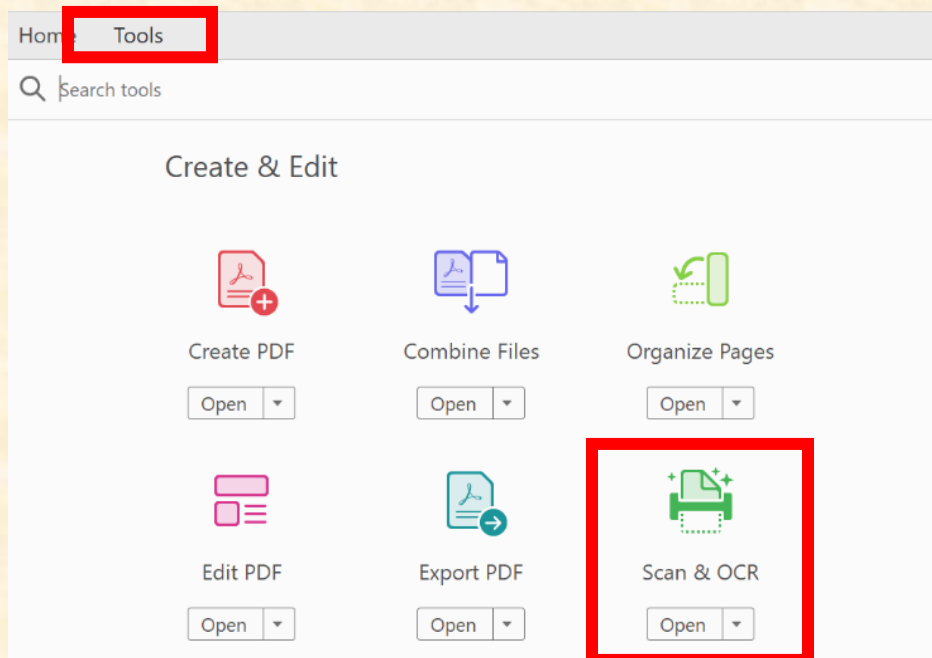
STEP 5: MAKE ANY SCANNED MATERIALS OCR SEARCHABLE.

According to Massachusetts Rules of Electronic Filing, all e-filed documents must be filed in searchable PDF. See [Mass. S. J. C Rule 1:25, Mass. R. E. F. 9 \(a\)](#). Documents should be submitted as electronically converted PDFs rather than scanned PDFs whenever possible. Scanned PDFs are usually not searchable and must be made searchable using optical-character-recognition (OCR) software, such as Adobe Acrobat. It is **CRITICAL** to make your brief, addendum, and appendix OCR searchable. The Appeals Court may reject your filings if they are not compliant with the rule.

The Appeals Court recognizes that OCR software may not detect every line of text in the PDF (e.g. handwritten entries). Nevertheless, you should aim to make your entire document searchable whenever possible.

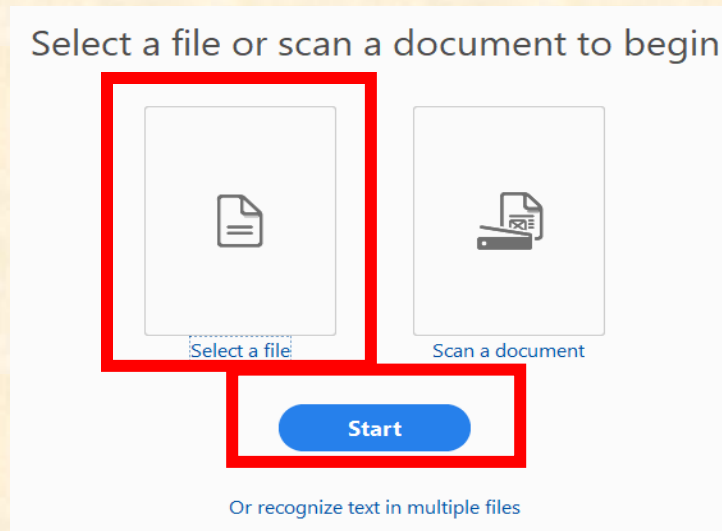
ADOBE ACROBAT PRO

1. Choose [Tools](#), select [Scan & OCR](#), and select [Open](#).

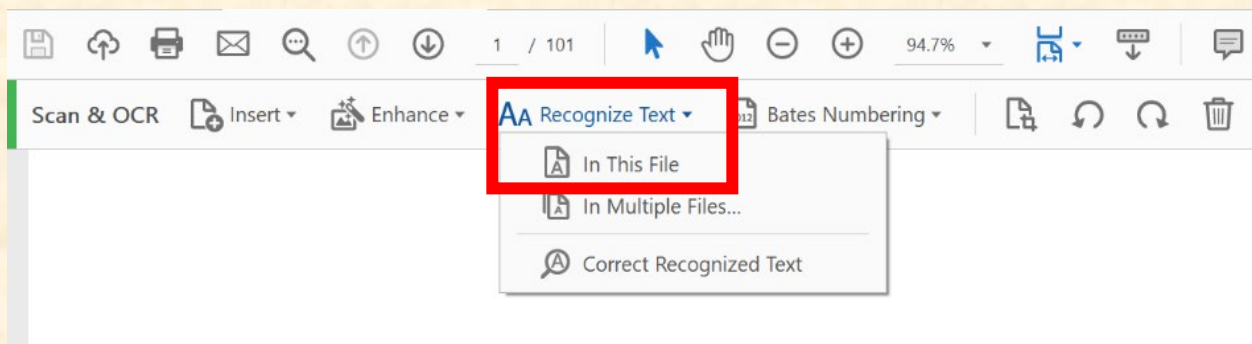


Clerk's Guide to Electronic Briefs

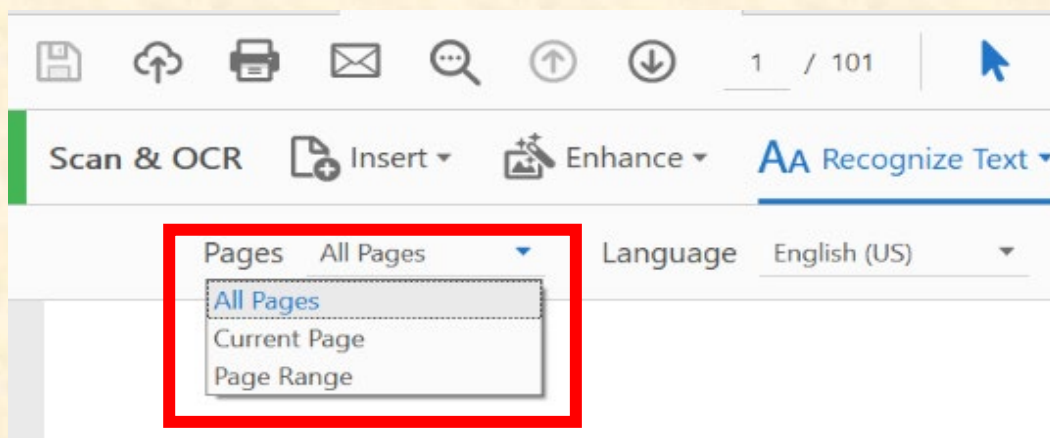
2. Choose [Select a file](#) and select [Start](#).



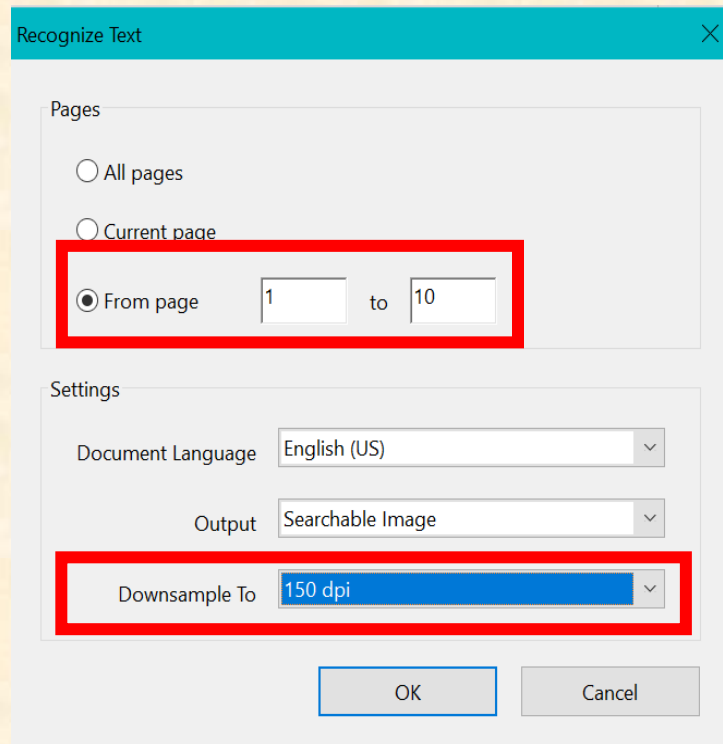
3. In the [Scan & OCR tool bar](#), choose [Recognize Text](#), and select [In This File](#).



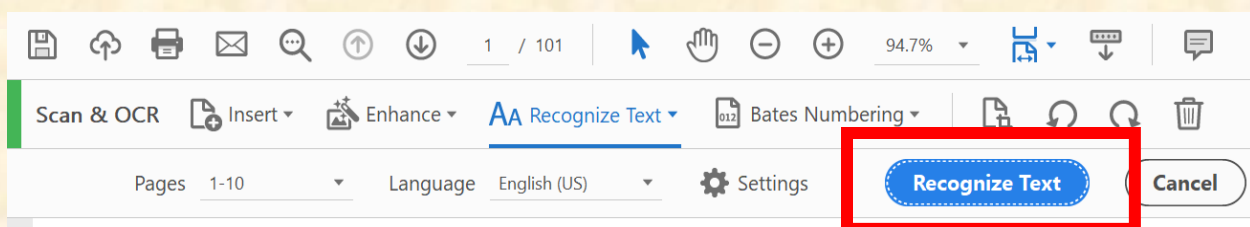
4. Select [All Pages](#) if the entire PDF needs to be converted or select [Page Range](#) to choose the pages that need to be converted.



5. If you choose [Page Range](#), enter the page range you wish to convert under [Pages](#) and select [OK](#). We recommend choosing [200 dpi](#) in the [Downsample To](#) drop down menu before converting your PDF.

A screenshot of the 'Recognize Text' dialog box. The 'Pages' section has three radio buttons: 'All pages', 'Current page', and 'From page'. The 'From page' option is selected, and the text '1 to 10' is entered in the adjacent input fields. The 'Settings' section has two dropdown menus: 'Document Language' set to 'English (US)' and 'Output' set to 'Searchable Image'. The 'Downsample To' dropdown menu is set to '150 dpi'. The 'OK' and 'Cancel' buttons are at the bottom. Red boxes highlight the 'From page' section and the 'Downsample To' dropdown menu.

6. Select [Recognize Text](#).



7. An alert will appear if the page is already searchable. You can choose [Ignore future errors in this document](#) and select [OK](#).
8. [Choose Save](#) to save the searchable PDF.

FIXING MISTAKES, EDITING PAGINATION, ADDING BOOKMARKS AND LINKS, AND REDACTING INFORMATION

HOW TO FIX MISTAKES IN A PDF

Edit PDF in Adobe Acrobat

(Standard & Pro)

If you spot a small mistake or typo in your brief or appendix after you converted it to a PDF, you may be able to correct it using the [Edit PDF](#) tool in Adobe. Although useful for correcting small mistakes or typos, you cannot use this tool to edit large sections of text or correct unusual fonts.

1. Choose [Tools](#), select [Edit PDF](#), and select [Open](#). Alternatively, choose [Tools](#), select [Content](#), and select [Edit Document Text](#).
2. Place the cursor where the mistake appears to correct the small mistake or typo.

Edit PDF in Word Processor

If you made a substantial mistake in your PDF brief or appendix, such as leaving out a significant portion of your brief or forgetting to add certain information, you should go back and edit your original Word document and re-save it as a new PDF.

ADDING HEADERS, FOOTERS, AND PAGE NUMBERS

1. In Adobe, choose [Tools](#), select [Edit PDF](#), select [Header & Footer](#), and select [Add](#).
2. Add the page number, date, or any other desired text into the appropriate section (e.g. [Left Header Text](#); [Center Header Text](#), etc.).
3. Choose the location where you wish such text to appear and select [Insert](#).
4. Choose [Page Range Options](#) and select either [All Pages](#) or [Pages From](#) to set the desired page range on the header or footer.

BOOKMARKING A PDF

Bookmarks allow readers to quickly navigate and locate different sections of your PDF brief and appendix. Bookmarks are not required but strongly encouraged as they can be extremely helpful to the justices in navigating an electronic document such as a brief or appendix.

For more information about adding bookmarks and internal links to briefs, please visit the Appeals Court's online guide "[How to Create PDFs with Bookmarks and Internal Links](#)".

Adobe Acrobat Automatically Generated Bookmarks

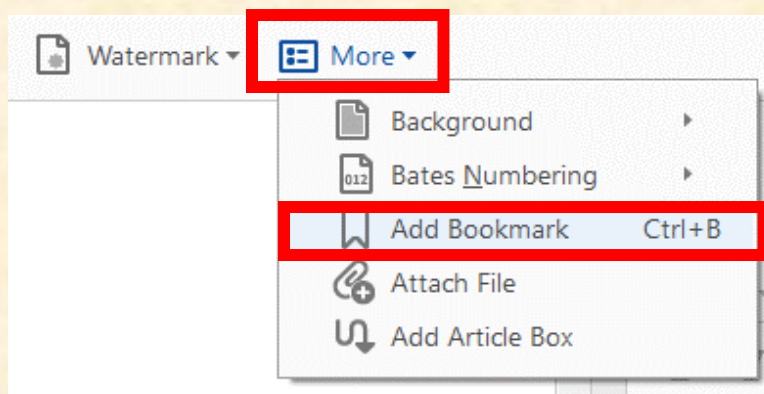
(Standard & Pro)

When using the [Combine Documents](#) feature, Adobe automatically creates bookmarks by merging file names. When naming your files, choose names that can be easily identified to avoid renaming bookmarks (e.g. Appendix 1 - Notice of Appeal; Appendix 2 - Trial Court Judgment; etc.).

Manually Adding Bookmarks in Adobe acrobat

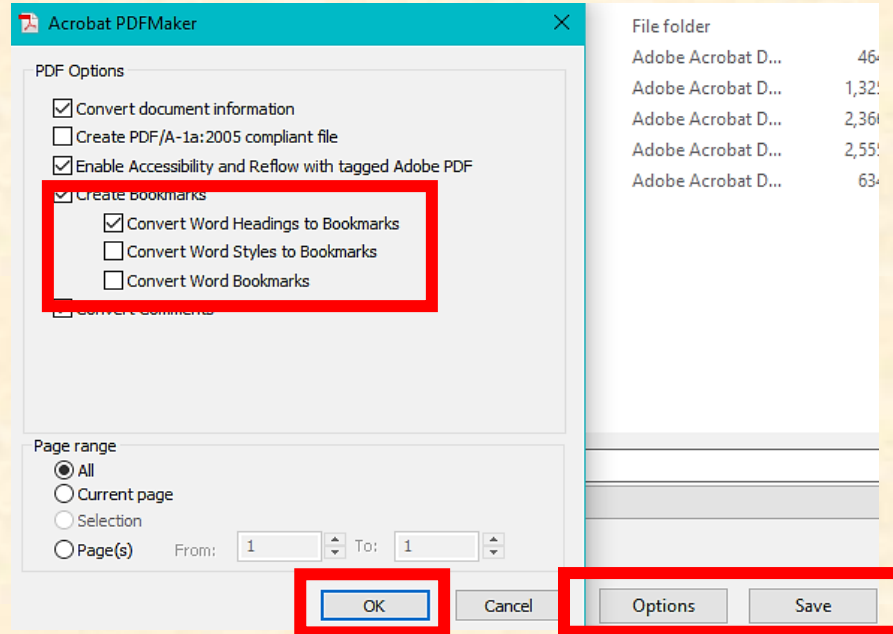
(Standard & Pro)

1. Choose the page where you wish to add a bookmark.
2. Choose [Edit PDF](#), select [More](#) and select [Add Bookmark](#).
3. Click the [New Bookmark](#) icon or press [Ctrl + B](#) on your keyboard to create a new bookmark.
4. To add a new bookmark in relation to an existing bookmark, select the bookmark above the existing bookmark and add a new bookmark. The new bookmark will appear below the selected bookmark and above the existing bookmark.



Word Automatically Generated Bookmarks

You can use the [Styles](#) feature to create headings in your Word document and then convert it to a PDF. Such document will automatically include bookmarks based on its headings.



Editing Bookmarks Using Word

- ◆ To **delete** a bookmark, select the [bookmark](#) and press [delete](#).
- ◆ To **edit** the name of a bookmark, double click the bookmark, type in the new name, and press [enter](#) or [return](#).

Moving Bookmarks Using Word

To move a bookmark's location within the [Navigation Pane](#), choose [Headings](#), select the [arrow](#) on the left side of the bookmark, and drag the bookmark to the desired location.

Nesting Bookmarks Using Word

Nesting bookmarks creates a hierarchical structure between different headings. For example, you can create different heading levels by applying different heading styles (e.g. [Heading 1](#), [Heading 2](#), etc.). Choose [Heading](#) styles in the [Home](#) tab and apply [Heading 1](#) for top-level headings, [Heading 2](#) for sub-headings, so on and so forth. This nesting is displayed in the [Navigation Pane](#) when you choose [View](#) and select [Navigation Pane](#).

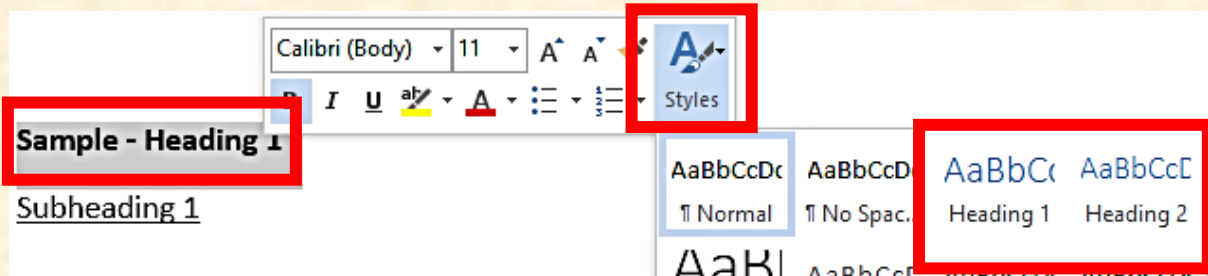
ADDING INTERNAL LINKS IN A PDF

Internal links in a document are links that allow readers to jump to different sections within the same document by clicking on the links. Internal links are not required but strongly encouraged as they can be extremely helpful to the justices in navigating an electronic document such as a brief or appendix.

Adding Internal Links Using Word

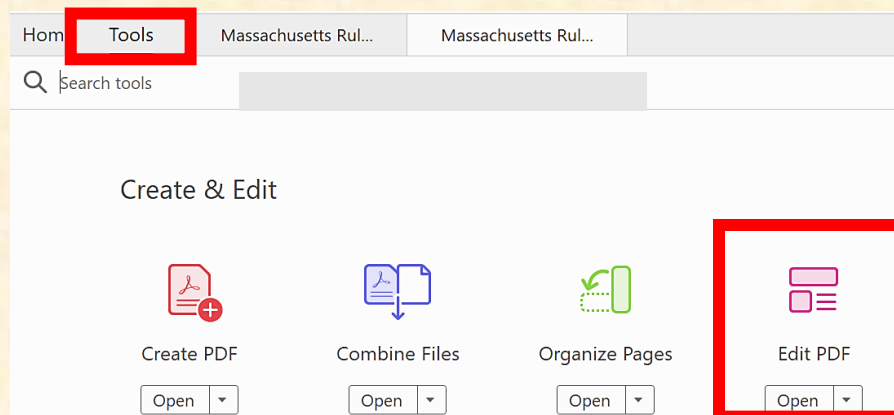
Word automatically generates internal links for phrases in Heading styles when converting the word document to PDF.

1. Highlight and right click a phrase you wish to be [linked](#).
2. Select [Styles](#).
3. Select a heading style such as [Heading 1](#) or [Heading 2](#) which will automatically generate an internal link for that phrase.

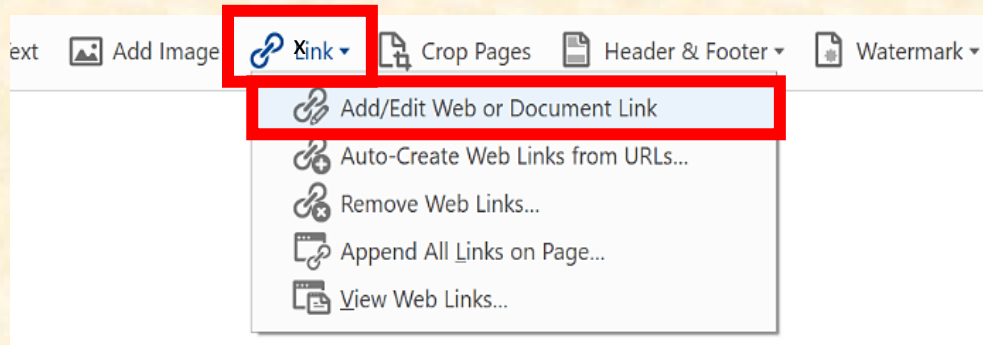


Adding Internal Links Using Adobe Acrobat Pro

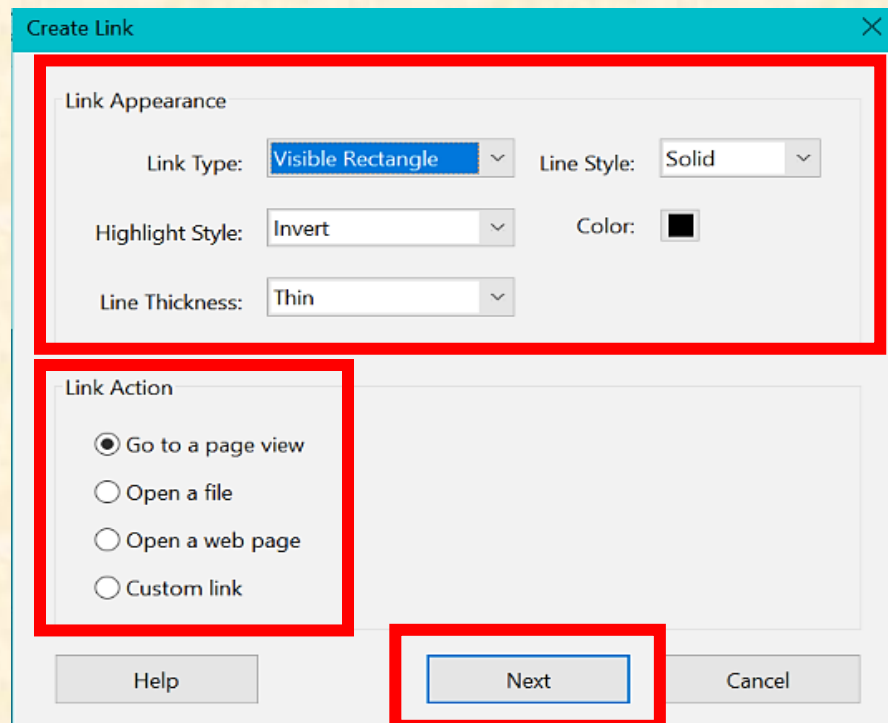
1. Launch Adobe Pro and open the PDF document you wish to edit.
2. Go to the [Tools](#) pane and select [Edit PDF](#).



3. Choose [Link](#) in the secondary toolbar and select [Add/Edit Web](#) or [Document Link](#).



4. Drag your mouse to draw a rectangle around text where you wish the link to appear. The [Create Link dialog](#) box will appear once you release the mouse.



5. In the [Create Link](#) dialog box, choose a [Link Type](#) (e.g., Invisible Rectangle) and a [Highlight Style](#) for the link, and select [Next](#).
6. In the [Link Action](#) dialog box, choose [Go to a page view](#) to link to a specific page or section within the PDF, and select [Next](#).
7. Navigate to the page, heading, or section you wish to link to and select [Set Link](#).

INCLUSION OF IMPOUNDED MATERIALS IN BRIEFS OR RECORD APPENDICES

IMPOUNDMENT

The impoundment of certain materials in your brief and appendix means keeping some or all the papers, documents, or exhibits in your case separate and unavailable for public inspection. Impounded materials, however, are still available to the parties.

Appellate level impoundment procedures are governed by the Massachusetts Supreme Judicial Court [Rule 1:15](#) and the Massachusetts Rules of Appellate Procedure [Rules 16\(d\)](#), [16\(m\)](#), [18\(a\)](#), and [18\(d\)](#). The rules apply to both single justice and panel appeals. Parties must comply with the rules if they wish to impound information to keep it confidential. All information impounded in the trial court will remain impounded in the appellate court, unless otherwise ordered, provided the parties follow the required procedures. For more information, please visit the Appeals Court online guide to impoundment procedure. These rules require:

1. The parties refrain from disclosing impounded material, unless necessary.
2. The disclosing party, when disclosure is necessary, file and serve a notice of the disclosure or filing of such information.
3. The cover of briefs, record appendices, and other filings containing impounded material clearly indicate its inclusion (e.g., "**Impounded**" or "**Contains references to impounded material**").
4. In cases where only certain portions of the record need to be impounded, parties file a separate record appendix volume containing only that material, its cover labeled as containing impounded material.
5. The parties use a pseudonym or initials if a party's name is confidential or impounded.
6. A copy of any order of impoundment must be included in the record appendix.
7. The parties not to disclose impounded material at oral argument unless necessary and, in such instances, notify the clerk in advance and, in appropriate cases, make such disclosures in a manner that protects the confidential information.

PROTECTION OF PERSONALLY IDENTIFYING INFORMATION

All parties must follow Supreme Judicial Court [Rule 1:24](#): Protection of personal identifying information in publicly accessible court documents and Massachusetts Rules of Appellate Procedure [Rule 21](#): Protection of personal identifying information to protect Personally Identifying Information ("**PII**") when filing any publicly accessible court documents to reduce the possibility of identity theft, unwarranted invasion of privacy, etc.

PII include social security numbers, taxpayer identification numbers, credit card or other financial account numbers, driver's license numbers, state-issued identification card or passport numbers, and a mother's maiden name. Publicly accessible court documents include briefs, appendices, motions, and all other filings accessible to the public.

The filer is responsible for redacting any PII unless a specific exemption applies. Exemptions includes when the information in the document is specifically required by law, court rule, standing order, court form, or court order; the filer reasonably believes that the complete information is needed to resolve an issue or to establish the identity of a person before the court, or the document is the official record of an agency adjudicatory proceeding or another court proceeding.

If the filer includes any PII in a "**Public**" filing in an appellate court, the filer should simultaneously file one additional copy of the filing, with such PII redacted or omitted according to the guidelines, clearly marked "**Limited Personal Identifying Data**" on the cover and without including any addendum or appendix.

For more information, please visit the Supreme Judicial Court's website on [Rule 1:24](#) and the Appeals Court's website on [Rule 21](#). The online resources also include the Commentary of the Standing Advisory Committee on the Rules of Civil and Appellate Procedure on [Rule 1:24](#) and the reporter's notes on [Rule 21](#).

REDACTION

The filer is responsible for redacting PII. A redacted filing is a filing that either does not include complete PII or has portions of such information whited or blacked out so they are not readable. Unless the court orders otherwise, unredacted PII may be included in documents filed with the court if an exception applies. Please visit the Supreme Judicial Court' website on [Rule 1:24](#) for a complete list of exceptions.

While [eFileMA](#) allows users to designate their filings as "**Public**" or "**Impounded**," a party should avoid including personally identifying, impounded, or confidential information in their brief and appendix whenever possible. If PII must be included, it should be redacted as follows:

Social Security Number, Driver's License/ID Card Number, and Passport Number

All but the **last 4 digits** of the number must be redacted. For Example:

- ◆ James' SSN is [0000-00-0000](#). His redacted SSN may be written as "[xxxx-xx-0000](#)" or "[SSN ending in 0000](#)."

Mother's Maiden name

All but the **first initial** of the mother's maiden name must be redacted. For Example:

- ◆ James' mother is [Joy Solomon](#). His redacted name is "[Joy S](#)."

Financial Account Numbers/Credit Card Numbers

All but the **last 4 digits** of the number must be redacted. For Example:

- ◆ James' credit card number is [1111 2222 3333 4444](#). His redacted credit card number may be written as "[xxxx xxxx xxxx 4444](#)," or "[credit card number ending in 4444](#)."

Redacting Using a Word Processor

If you have access to the original text document in a word processing system, the best way to redact sensitive information is by locating the information and replacing it with "xxx," "beginning with" or "ending with," or an initial. For example:

"James Solomon's checking account number at Aptitude Credit is 0000 0000 0000 0000."

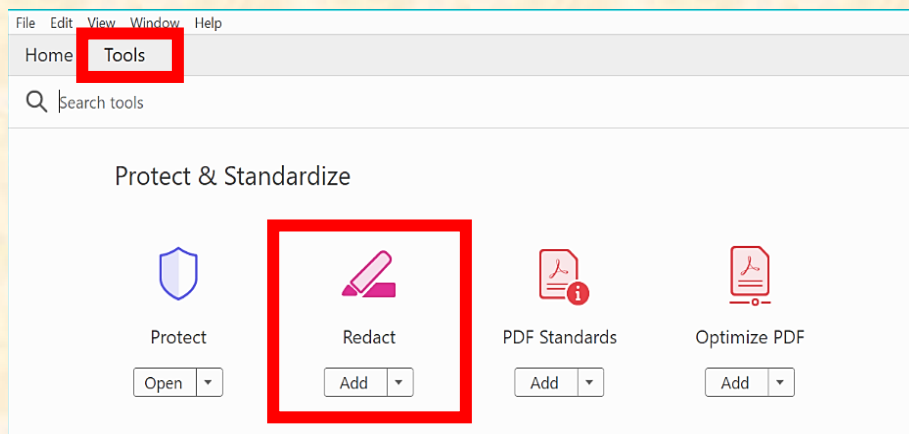
Becomes

"James Solomon's checking account at Aptitude Credit is xxx0505."

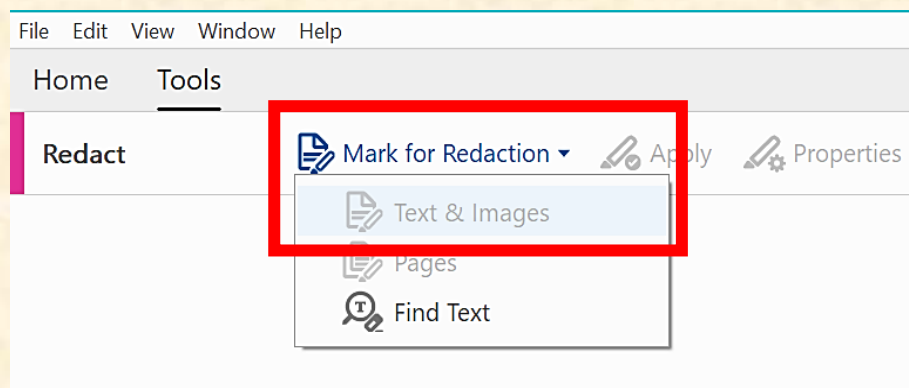
Redacting Using Adobe Acrobat Pro

(Feature Not Available for Adobe Acrobat Standard)

1. Choose Tools, select Redact, and select Open.

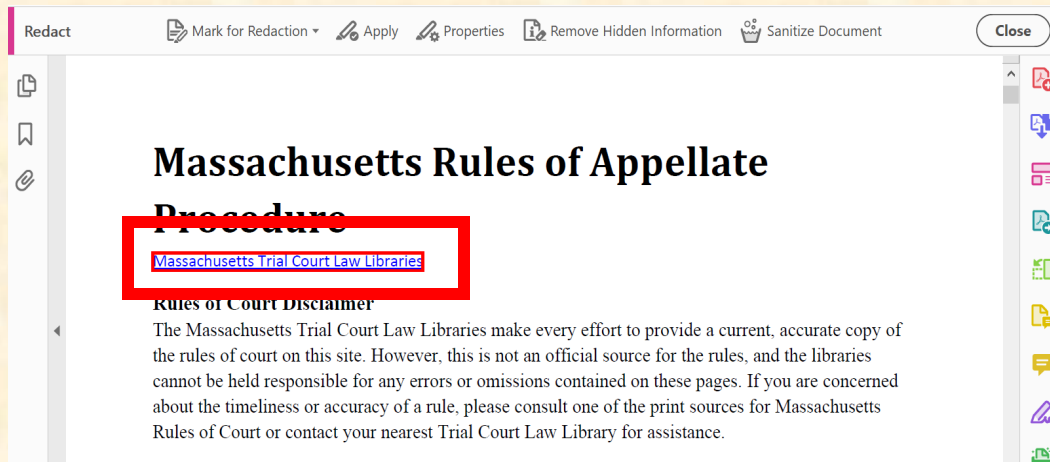


2. Choose Mark for Redaction and select Text & Images.

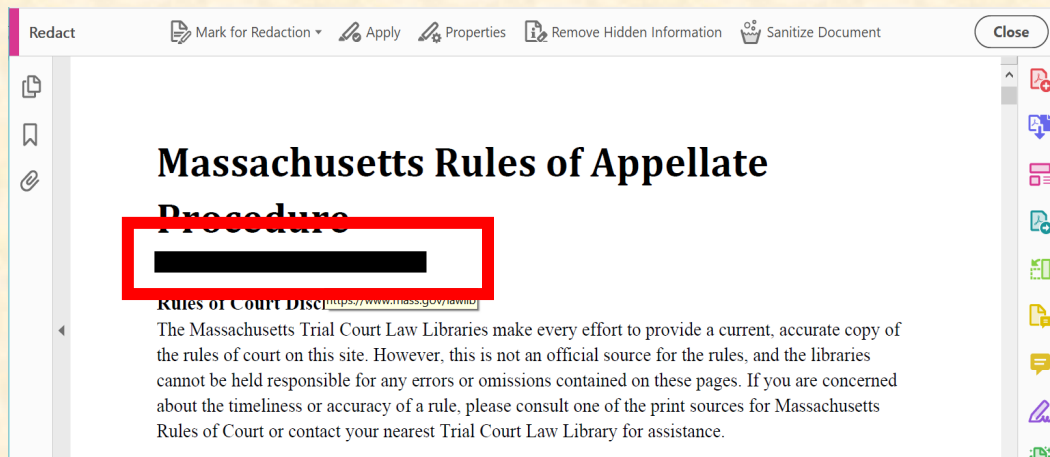


Clerk's Guide to Electronic Briefs

3. Highlight the text you wish to redact, release your mouse, and you will see a red box around the text you highlighted.



4. Place your cursor over the word to preview the redaction.



5. Choose **Apply** and select **OK**.

