

ECF Curriculum Outline

Chapter 13 Trustee Training

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Notes:

CM-ECF Glossary

Adobe Acrobat

Application used almost universally to create and view "PDF" documents. "Adobe" created the "PDF" format.

Attachment

An additional supporting document filed electronically with a pleading. Proposed orders can be attachments to motions and applications.

Automatic E-mail Notification

A CM-ECF feature that permits any user to receive notification of the filing of a case or document via e-mail. Users can choose to receive separate notifications throughout the day or an end-of-day summary.

Browse

A Windows operation of navigating through directories via a mouse to select a specific file.

Browser

A browser is a software program which provides a user-friendly interface allowing a user to access information and services available on the Internet. The browser programs interpret Hypertext Markup Language (HTML) documents delivered from WEB servers. Netscape Navigator and Internet Explorer are the two most popular WEB browsers. Only Netscape Navigator is guaranteed to work with CM/ECF.

Category

In CM-ECF, a category is a classification of similar document types. Category selections appear as hypertext links under the Bankruptcy and Adversary menu selections.

Check Box

A control object a user can click to include choices from a list. Check boxes are designed so that you can chose one or more items from a list.

CM-ECF

Case Management/Electronic Case Filing is the Administrative Office's new application that will revolutionize the way we do business, completely replacing BANCAP with "next generation" case management capabilities. With CM-ECF attorneys can file cases and documents electronically via the Internet.

Default

A Default is a common suggested value displayed by CM-ECF on a screen. Like BANCAP, many fields in CM/ECF have common values suggested. If correct, you may accept them; if incorrect, you type over them.

Document Type

In CM-ECF, Document Type describes a specific filing or event with similar characteristics within a case which behaves uniquely from other document types.

Drop Down Box

A window listing selections of data alphabetically in a text box. They are used throughout CM/ECF for making selections. When you see the selection you want to make, click to highlight it. To make multiple selections, hold your control key down when making the second (third, etc.) selection.

Hypertext (HTML) Link

A hypertext link is a URL imbedded in an html (hypertext markup language) document most often underlined. It permits the user to move from one area (or topic) to another in a Web based program.

Notice of Electronic Filing

An electronic document produced by CM-ECF which certifies each filing with the U.S. Bankruptcy Court.

PDF Document

A "Portable Document Formatted" document is a type of imaged document created by Adobe Acrobat. To be filed in CM-ECF, all documents must be in "PDF" format with the exception of the creditor list (matrix) which must be uploaded in a text (.txt) format

Radio Button

A round selection button used to choose items from a list. Radio buttons are designed so that you can chose only one item.

URL

URL is short for Universal Resource Locator. URLs are the naming scheme used to find Web pages. A URL is similar to a street address. The URL for the Western District of North Carolina Bankruptcy Court website is:

www.ncwb.uscourts.gov

Converting to PDF Format-Part I

There are two ways to convert documents into PDF (Portable Document Format) files. PDF files can be created from documents that are in a word processing system, or they can be created utilizing scanning equipment and Adobe Acrobat software. This module (Part I) will guide you through the process of converting word processing documents to PDF format. Part II will explain the process utilizing scanning equipment and Adobe Acrobat software.

Converting Word Processing Documents to PDF Format

(this example demonstrates the process using WordPerfect)

- STEP 1** Type document in word processing; save to hard drive.
- STEP 2** With the document open on the screen, click on **File** from the drop down menu and select the **Print** option. (See Figure 1)

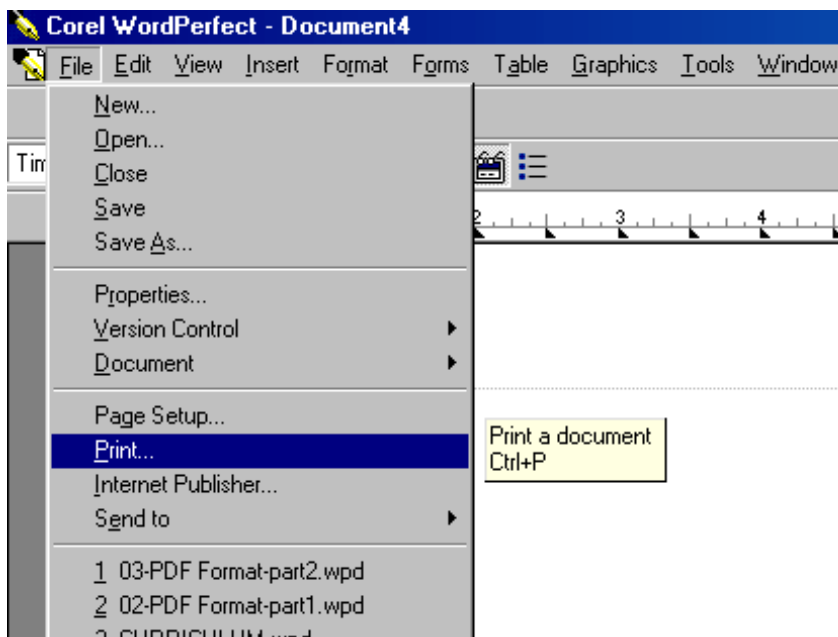


Figure 1

- STEP 3** The **Print** dialog box displays. (See Figure 2)

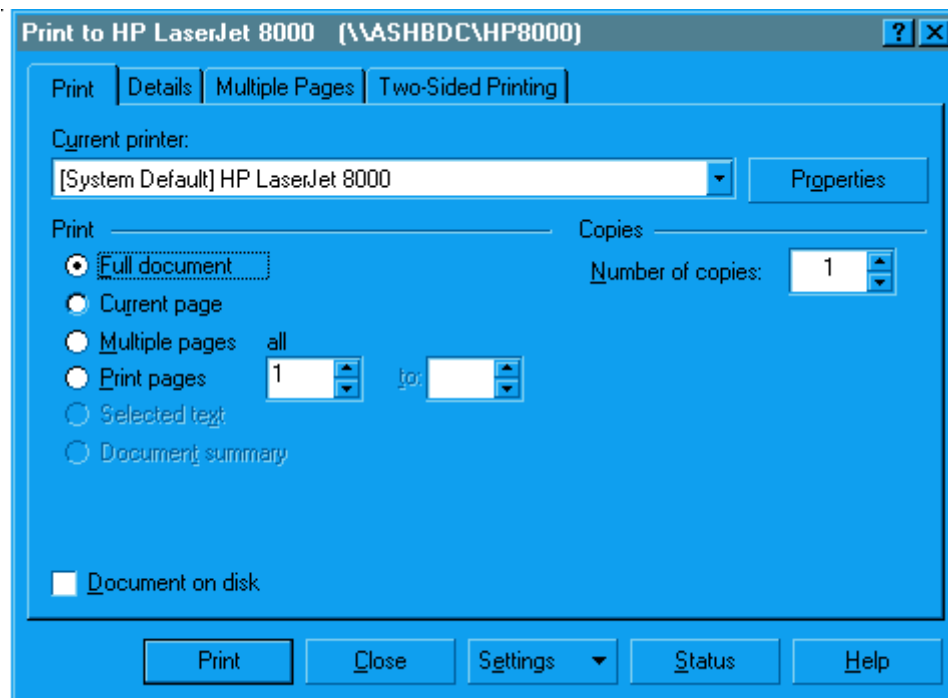


Figure 2

- ◆ Click on the down arrow ▼ to the right of **C**urrent printer: field

STEP 4 A list of available printers displays. (See Figure 3)

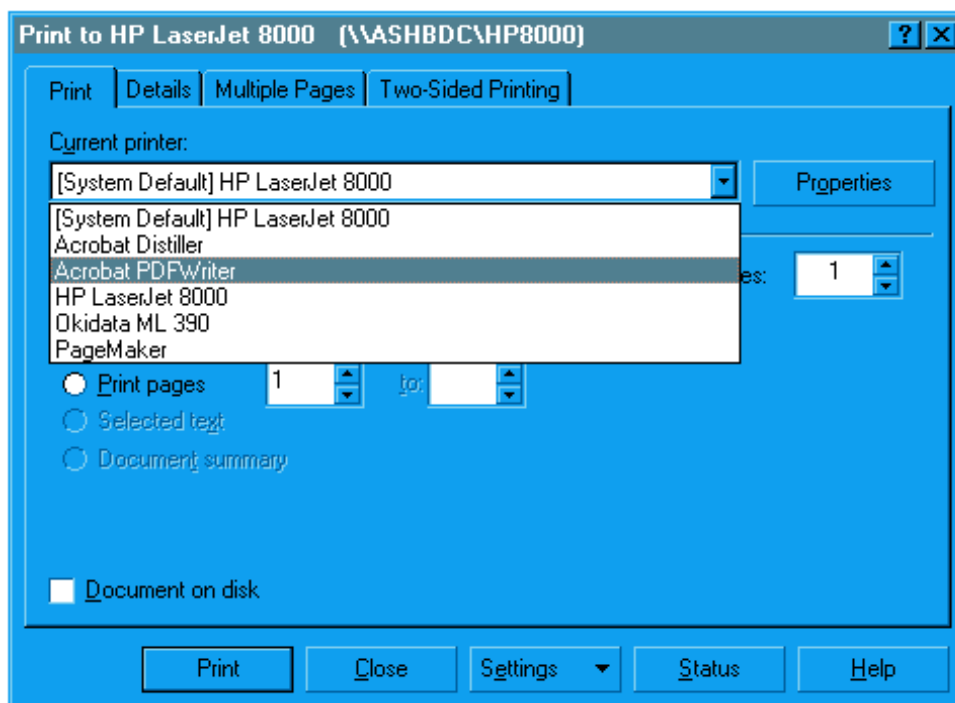


Figure 3

- ◆ Click to highlight and select the **Acrobat PDF Writer** printer.
- ◆ Click the **[Print]** button to create the PDF formatted document.

Note: The file will not actually print out; instead the document will be translated into PDF format.

STEP 5 The **PDF File Save As** dialog box displays. (See Figure 4)

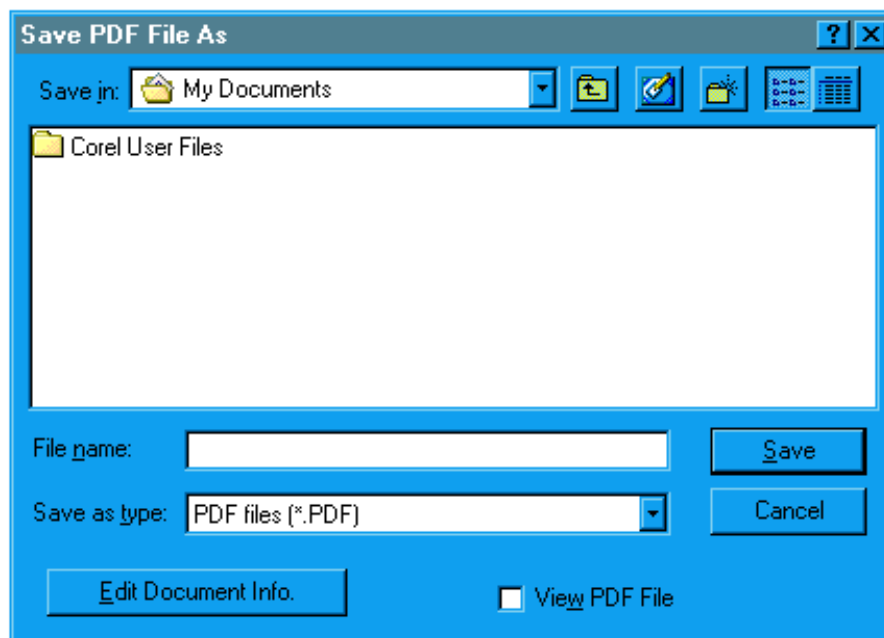


Figure 4

- ◆ Navigate to the appropriate folder (directory) where you would like to save the PDF image.
- ◆ Click inside the **File name:** box and type the name you have chosen for the image.

Note: The *.pdf* extension will automatically be added to the filename you type. (i.e., if you name your file: *hallmotn*, the filename will be saved as *hallmotn.pdf*).

- ◆ Click the **[Save]** button.

Important:

An Adobe PDF image file has now been created, and will be available to associate to the event during the docketing process.

The PDFimage cannot be viewed or altered in the word processing program. You will, however, be able to view the image during docketing to assure that you are associating the correct image with the docket event.

The original word processing text document remains on your hard drive as originally saved.

If you need make changes to a document that has already been turned into an image (but not yet docketed), delete the incorrect PDF image file from the hard drive. Open the text document in word processing and make the necessary changes. Save the corrected text document. Create the PDF image file.

SHORT STEPS

- | | |
|--------|---|
| Step 1 | Type document in word processing program; save. |
| Step 2 | Click ' <i>File</i> '; select ' <i>Print</i> '. |
| Step 3 | Select Adobe Printer; click ' <i>Print</i> '. |
| Step 4 | Name and save PDF file. |

Converting to PDF Format-Part II

There are two ways to convert documents into PDF (Portable Document Format) files. One way is to convert documents that are created in your word processing system. The other way is to convert documents (such as attachments and exhibits) utilizing scanning equipment and Adobe Acrobat software. This module (Part II) will guide you through the process of converting scanned documents to PDF format utilizing scanning equipment and Adobe Acrobat software. Part I explains the process of converting word processing documents into PDF format.

Converting Scanned Documents to PDF Format Using Adobe Acrobat Software

- STEP 1** Place document and all attachments or exhibits on the scanner bed.
- STEP 2** With document in place, launch Adobe Acrobat software by double-clicking on the desktop icon for Adobe Acrobat.
- STEP 3** A blank **Adobe Acrobat Image Screen** displays. (See Figure 1)

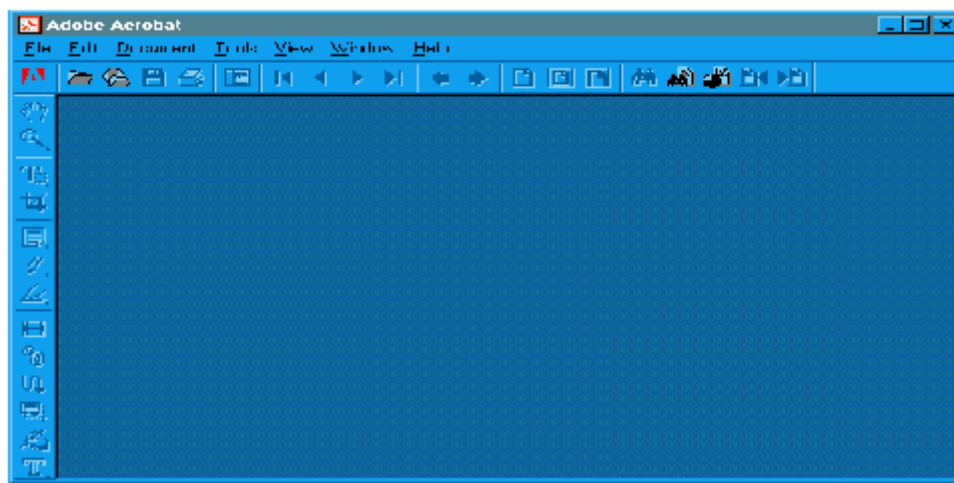


Figure 1

- ◆ Click *File* from the drop down menu. (See Figure 2)

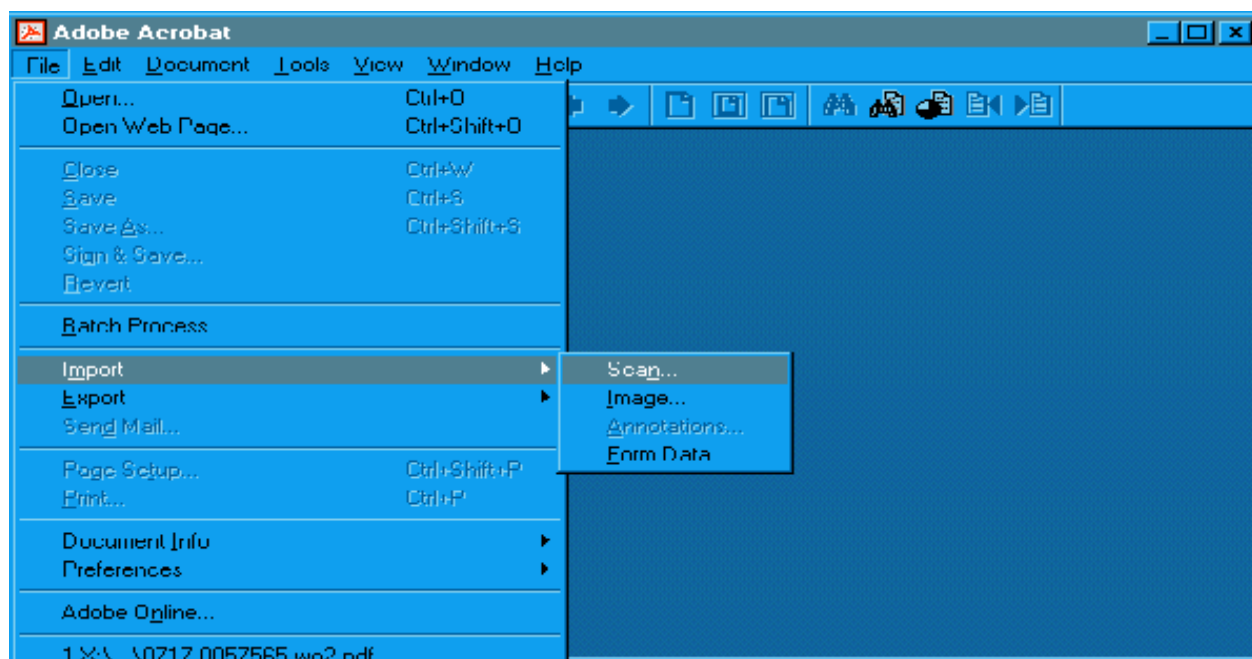


Figure 2

- ◆ Select the *Import* option.
- ◆ Select the *Scan* option.

STEP 4 The Adobe Acrobat Scan screen displays. (See Figure 3)

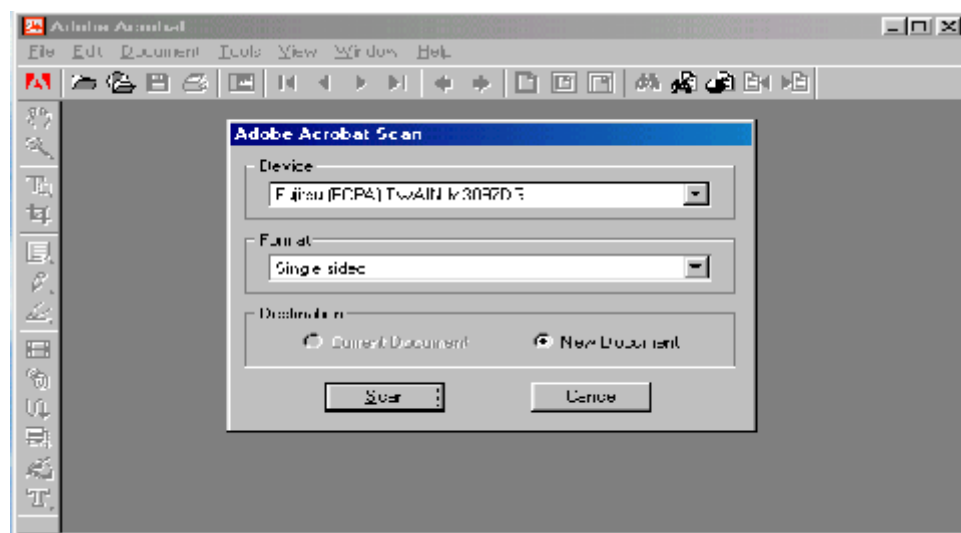


Figure 3

- ◆ Select the device for your scanning equipment.

Note: This will only need to be done the first time a document is scanned.

After that, the system will always default to the correct device and will only need to be modified if the scanning equipment changes.

- ◆ Select the page format (Single Sided or Double Sided).
- ◆ Select the radio box to indicate the destination of **New Document**.

Note: Be sure the radio button for “New Document” is selected. Select the radio button “Current Document” only if you wish to add additional pages (append) to a scanned document. If so, be sure the image you would like to append is currently open and displayed on the image screen.

- ◆ Click **[Scan]** to continue.

STEP 5 A Dialog Box displays. (See Figure 4)

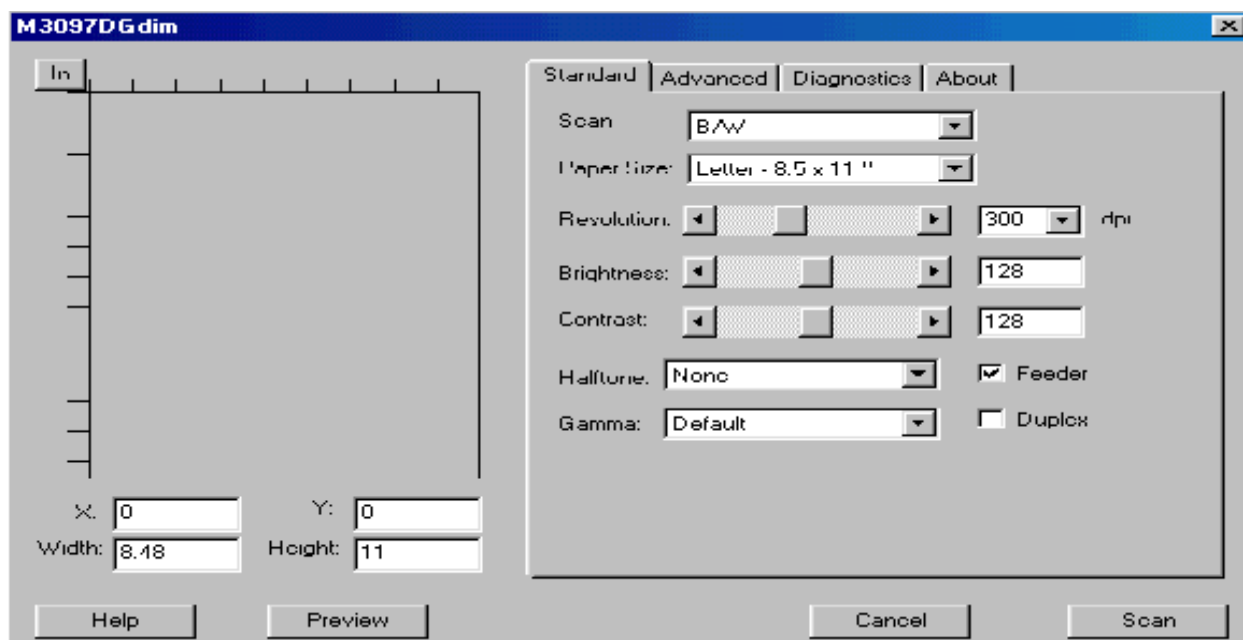


Figure 4

This box allows the adjustment of various settings for the scanned image. Using the default settings will usually be acceptable to create the scanned image. However, these settings may be adjusted if required.

- ◆ Click **[Scan]** to begin scanning the document.

STEP 6 Once all pages placed on the scanner have been scanned, the **Adobe Acrobat Scan** dialog box will display. (See Figure 5)

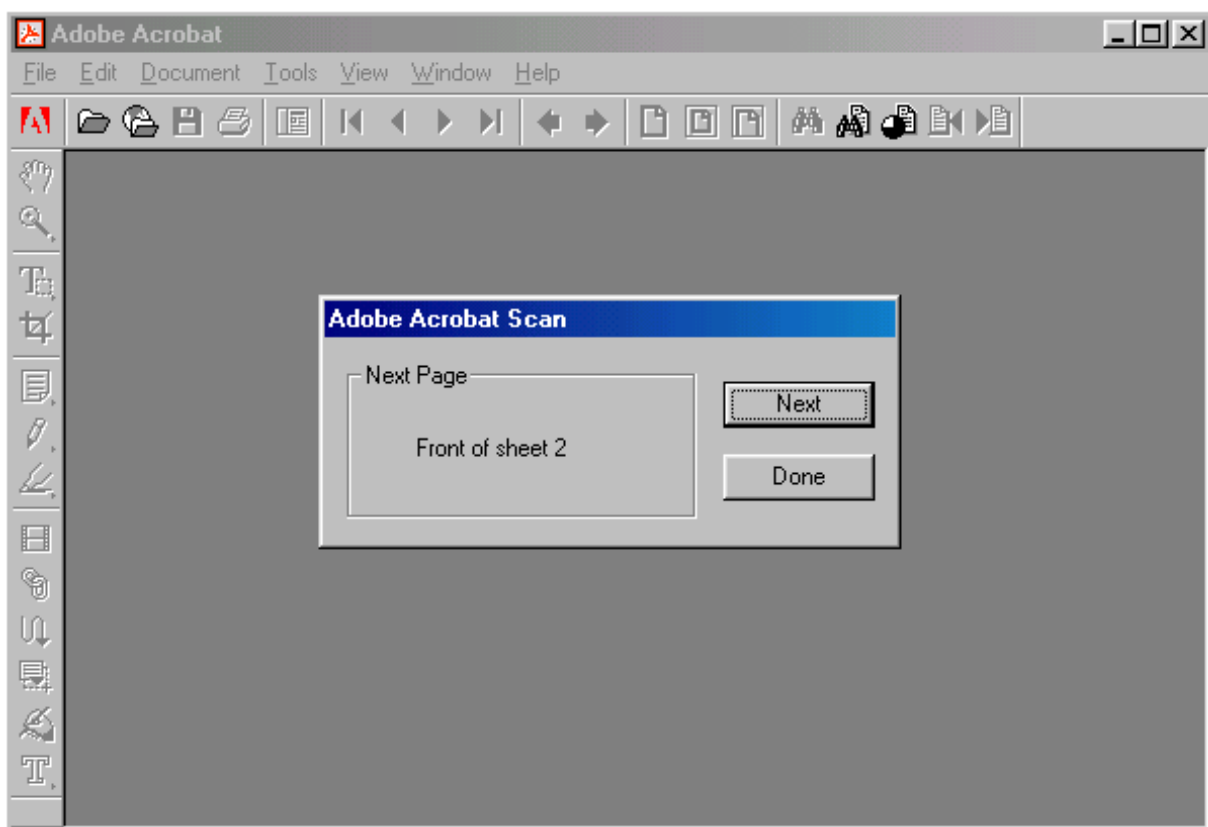


Figure 5

- ◆ Click **[Next]** if you have additional pages to scan. The additional pages will be added (appended) at the end of the document just scanned.
- ◆ Click **[Done]** when all document pages have been scanned.

Note: the number of pages reflected in the **Adobe Acrobat Scan** dialog box will always be one more than the number of pages actually scanned because the number reflected represents the page number of the next scanned page if there will be one. In the example above, one page has been scanned. Adobe Acrobat prompts that the "Next Page" would be "Front of sheet 2". **(See Figure 5)**

- ◆ When all pages have been scanned and you have clicked **[Done]**, the **Image Screen** will display.

STEP 7 Quality assure the image by selecting **View** from the drop down menu and clicking on **Full Screen** to view all pages of the image. **(See Figure 6)**

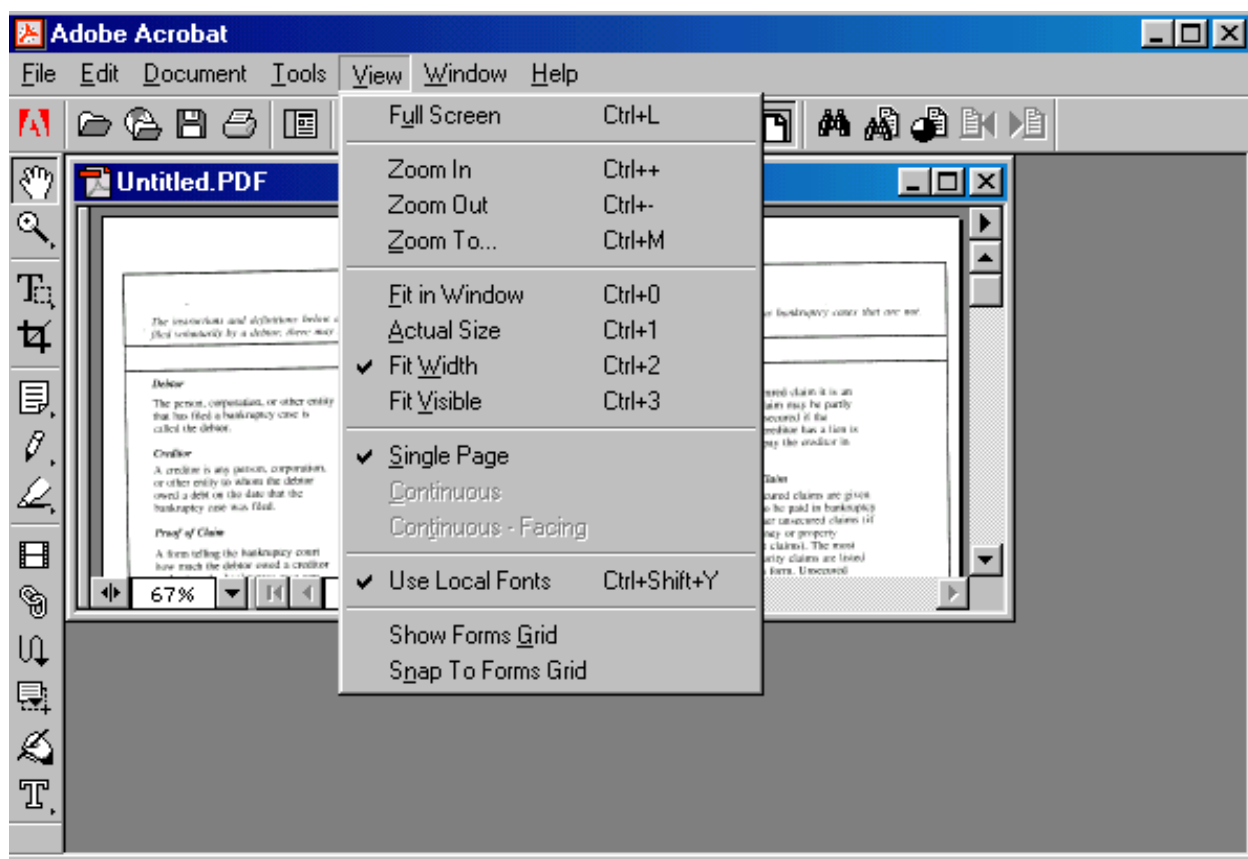


Figure 6

- ◆ The image will appear on the screen in full size and each page can be quality assured. (If necessary, return to Step 1 and re-scan the document if the image is unacceptable or pages are missing.) When you are finished viewing the document, press the **[Esc]** escape to return to the **Image Screen**.

STEP 8 Once the image is correct and complete, the file must be named and saved.

- ◆ Select **File** from the drop down menu, and click **Save As**. (See Figure 7)

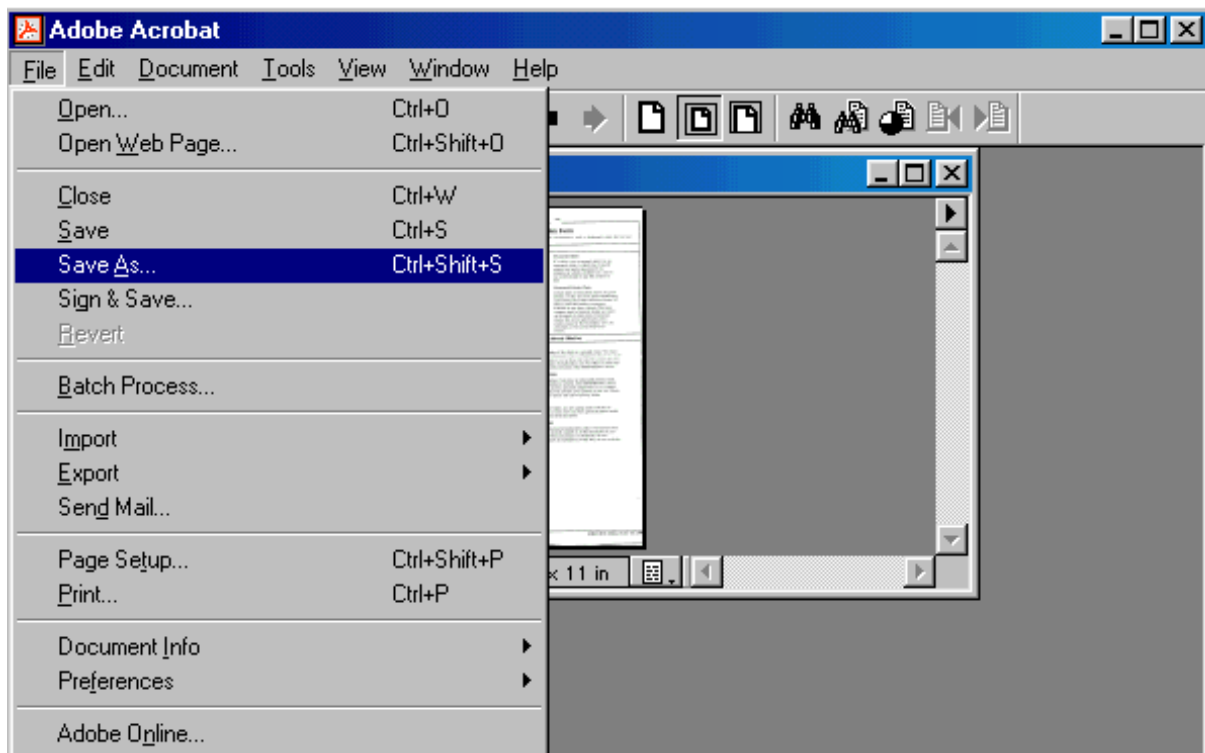


Figure 7

STEP 9 The **Save as Dialog Box** displays. (See Figure 8)

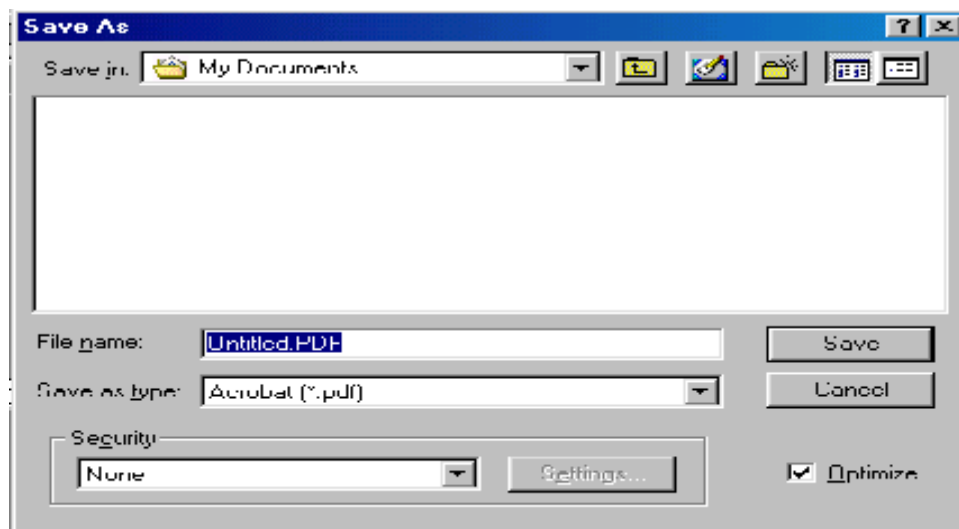


Figure 8

- ◆ Navigate to the folder where you wish to save the PDF file.
- ◆ Choose a filename and type that name in the **File name:** box. The *.pdf* extension will automatically be added. (For example, if you name the file: *hallmotn*, the image will be saved with the name: *hallmotn.pdf*). The PDF file will be saved on your hard drive (or floppy, if chosen) in the folder to which you have navigated. The image can then be associated to the ECF event during the docketing process.

Note: For verification purposes, the image may be viewed during docketing process in ECF to ensure that the correct image is associated with the docket entry.

- ◆ Click the **[Save]** button.

STEP 10 The document displays on the **Adobe Acrobat Image Screen**. (See Figure 9)

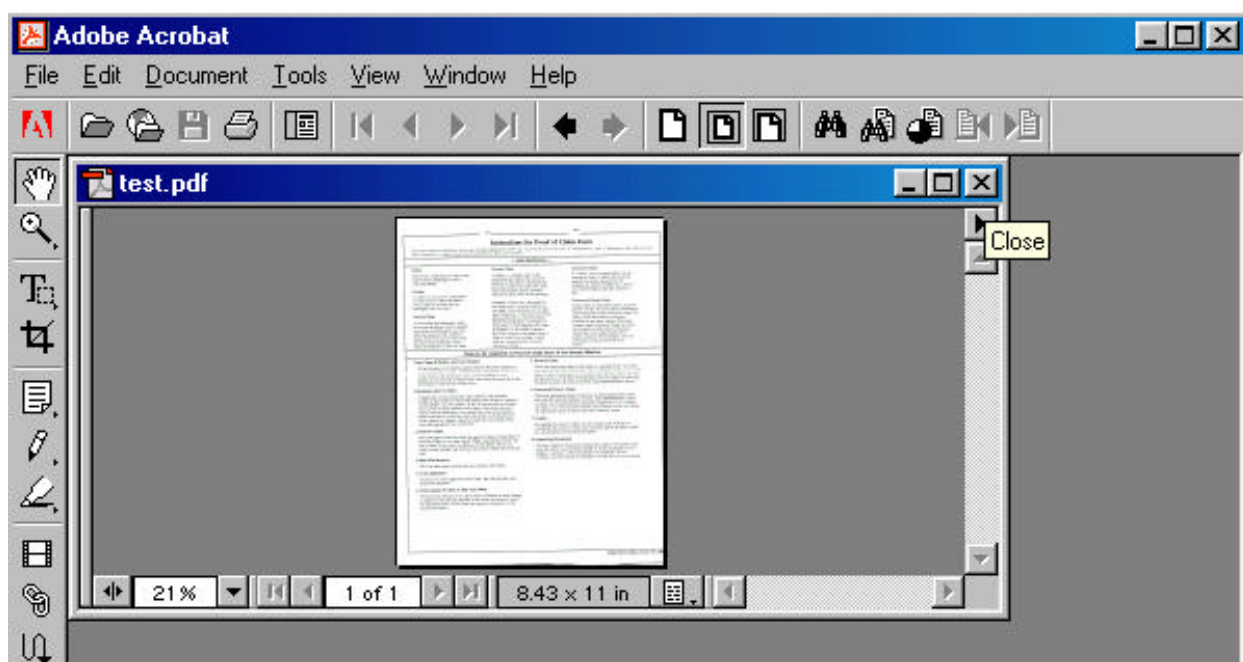


Figure 9

- ◆ The image has now been saved.
- ◆ Close the image by clicking on the "x" in the right corner of the image (the "x" on the line that contains the filename of the image).

STEP 11 A blank **Adobe Acrobat Image Screen** displays. (See Figure 1)

- ◆ The scanner is available to scan the next document. Repeat **Steps 1** through **10** for each document to be scanned.

Short Steps:

- Step 1 Launch Adobe Acrobat
- Step 2 Place document on scanning bed
- Step 3 Click '*file*', then '*import*', then '*scan*'.
- Step 4 Select New Document; select single or double sided; click '*scan*'.
- Step 5 Click '*Done*' when all pages have been scanned.
- Step 6 Quality assure the image.
- Step 7 Click '*File*', then '*Save As*'. Name and save the image.
- Step 8 Close the image document.

Accessing CM/ECF

Access to the CM/ECF system is gained through using the Netscape Navigator WEB browser.

STEP 1 Open Netscape Navigator and enter the URL (address) of the court's homepage in the browser's **Location** field. (See Figure 1)

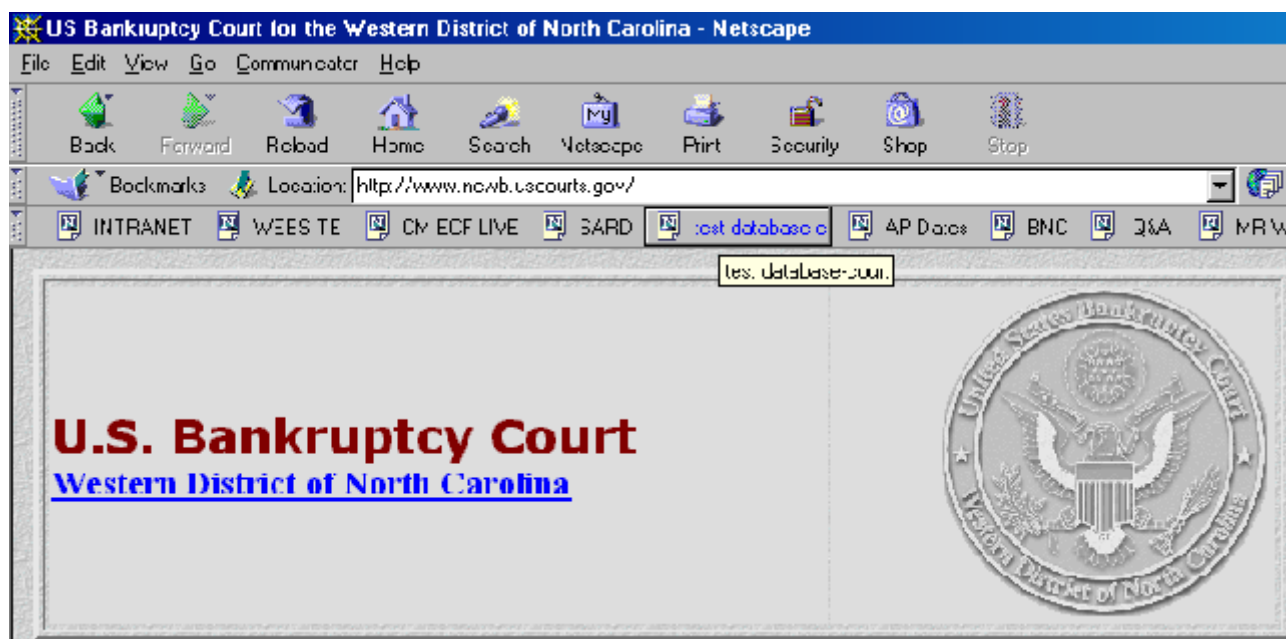


Figure 1

STEP 2 Click on the CM/ECF Information hypertext link in the center of the homepage. (See Figure 2)

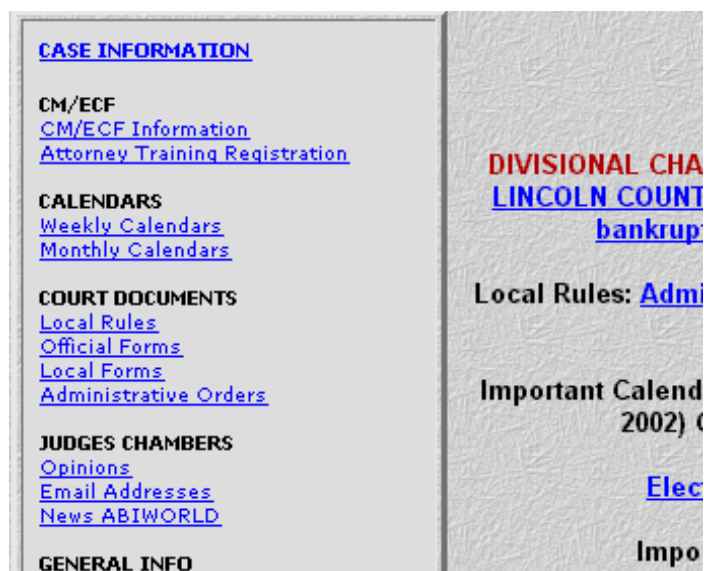


Figure 2

STEP 3 The CM/ECF Information page displays. (See Figure 3)

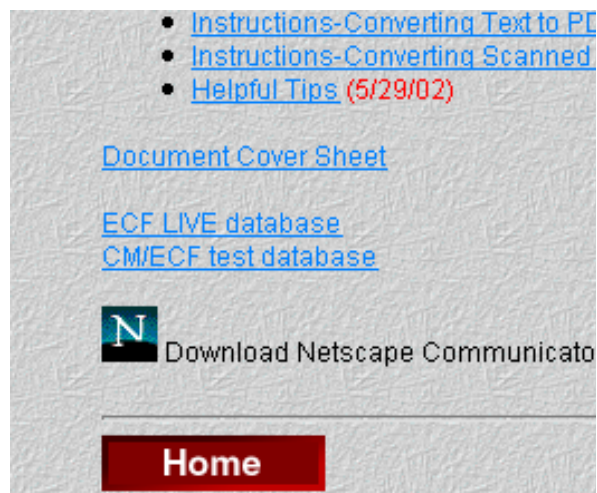


Figure 3

- ◆ Go to the bottom of the page and click on the **ECF LIVE database** link.

STEP 4 The ECF Main screen displays.

- ◆ Click on the hypertext link: Western District of North Carolina - Document Filing System.

STEP 5 The **ECF/Pacer Login** screen displays. (See Figure 4)

ECF/PACER Login


Notice

This is a **Restricted Web Site** for Official Court Business only. Unauthorized entry is prohibited and subject to U.S. Code. All activities and access attempts are logged.

Instructions

Enter your ECF login and password for electronic filing capabilities. If you do not need filing capabilities, enter your PACER login. If you do not have a PACER login, contact the PACER Service Center to establish an account. You may register at <http://pacer.psc.uscourts.gov> or call the PACER Service Center at (800) 676-6856 or (210) 301-6440.

An access fee of \$.07 per page, as approved by the Judicial Conference of the United States at its September 1997 meeting, will be charged to your PACER login that is kept on file. If you do not need PACER login and password. The Client code is provided to the PACER user as a means of tracking transactions. It is thirty-two alphanumeric characters long.

The image shows a web form titled "Authentication" with a yellow background. It contains three input fields: "Login:" with a text box, "Password:" with a text box, and "client code:" with a longer text box. Below the fields are two buttons: "Login" and "Clear".

Authentication

Login:

Password:

client code:

Figure 4

- ◆ Enter your **Login** and **Password**. Your login and password are case sensitive. For Example, a login of thomask should not be Thomask or THOMASK. Enter a client code, if desired.
- ◆ Click **[Login]** to continue.

NOTE: The **preferred method** to **exit** CM/ECF is to click the **Logout** hypertext link on the CM/ECF Main Menu Bar.

Trustee's Rejection of Appointment

The appointed trustee of a bankruptcy case will reject his position if there is a conflict of interest. A successor trustee will be appointed upon receipt of a Trustee's Rejection of Appointment. The following instructions will guide you through the Electronic Case Filing (ECF) system for Trustee Rejection of appointment.

STEP 1 Click the [Bankruptcy](#) hypertext link on the CM-ECF Main Menu.

STEP 2 The **Bankruptcy Events** screen displays.

- ◆ Click the [Trustee/Bankruptcy Administrator](#) hypertext link.

STEP 3 The **Case Number** screen displays.

- ◆ Enter the case number in yy-nnnnn format including the dash.
- ◆ Click **[Next]** to continue.

STEP 4 The **Event Type** screen displays.

- ◆ Verify the case number and case name.
 - ◆ If the case number and name do not match your document, click the browser **[Back]** button to re-enter the case number.

Note: If the system prompts that you have entered an invalid case number, click the browser **[Back]** button to try again. You may use the browser **[Back]** button at any time during this process to verify former screens until the final submission.

- ◆ Use the down arrow ▼ to the right of the box to scroll through the event list to select the document to be filed. Click to highlight ***Rejection of Appointment***.
- ◆ Click **[Next]** to continue.

STEP 5 The **PDF Document Selection** screen displays.

- ◆ Click **[Browse]**, then navigate to the directory where the appropriate PDF file is located. Double-click the PDF file to select it.

Note: If you wish to view the image before selecting to be sure you have chosen the correct file, before double-clicking, first right click on the highlighted filename and click on ***open***. You can view the image in Adobe Acrobat, then close Adobe Acrobat when you have finished viewing the image.

- ◆ The **Attachments to Document** option defaults to **No**. If you have attachments to this document, click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attachments to Documents* for more information).
- ◆ Click **[Next]** to continue.

STEP 6 The **Final Docket Text** screen displays.

- ◆ A prefix box is available to add more detail to the docket text.
- ◆ Click the down arrow ▼ to display the prefix options.

Options to choose from are:

[none]
Agreed
Alias
Amended
Emergency
Ex Parte
Scheduled with urgency
Fifth
Final
First
Fourth
Interim
Intervenors
Joint
Omnibus
Opposition
Proposed
Sealed
Second
Sixth
Supplemental
Supporting
Third
Third Party

- ◆ Verify the accuracy of the Final Docket Text.
- ◆ Click **[Next]** to continue.

STEP 7 The **Final Approval** screen displays.

- ◆ Verify the Final Docket Text. Read the warning message.
- ◆ If the Final Docket Text is correct:
 - ◆ Click **[Next]** to continue.
- ◆ If the Final Docket Text is incorrect:

- ◆ Click the browser **[Back]** button to find the error(s) and then proceed with the event.
- ◆ To abort or restart the transaction, return to **Step 1** and begin again.

STEP 8 The **Notice of Electronic Filing** displays.

- ◆ Clicking on the case number hypertext link on the **Notice of Electronic Filing** will present the docket report for this case.
- ◆ Clicking on the document number hypertext link will present the PDF image of the document just filed.
- ◆ Scroll down to see participants who have and have not registered for electronic noticing on this case.
- ◆ To print a copy of this notice click the browser **[Print]** icon.
- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ You may also save the notice through the browser **File/Save** option.

Proceedings Memos - 341 Meetings

This module demonstrates the steps a Chapter 13 trustee takes to file Proceedings Memos for §341 Meetings in the CM-ECF system.

Proceedings Memos - 341 Meetings Part I-A: Memorandum from 341(a) Meeting HELD

There are two ways to docket an entry to indicate that the 341 meeting was held and that the trustee is recommending confirmation of the plan. That is, through an individual entry and through a batch entry. Part I-A describes the steps to docket an individual entry in a single case to indicate a 341 meeting was held. Part I-B demonstrates the steps to docket a batch entry in many cases, indicating in each case the same entry of 341 meeting held, plan confirmed.

STEP 1 Click the [Bankruptcy](#) hypertext link on the CM-ECF Main Menu.

STEP 2 The **Bankruptcy Events** screen displays.

- ◆ Click the [Trustee/Bankruptcy Administrator](#) hypertext link.

STEP 3 The **Case Number** screen displays.

- ◆ Type the case number in yy-nnnnn format.
- ◆ Click **[Next]** to continue.

STEP 4 The **Document Selection** screen displays.

- ◆ Verify the case number and case name.
- ◆ If the case number and name do not match your document, click the browser **[Back]** button to re-enter the case number.

Note: If the system prompts that you have entered an invalid case number, click the browser **[Back]** button to try again. You may use the browser **[Back]** button at any time during this process to verify former screens until the final submission.

- ◆ Use the down arrow ▼ to the right of the box to scroll through the Event Type list to select the document to be filed. Click to highlight **Memorandum from 341(a) Meeting HELD**
- ◆ Click **[Next]** to continue.

STEP 5 The **Case Verification** screen displays.

- ◆ Verify the case name and number again.
- ◆ Click **[Next]** to continue.

STEP 6 The **Pending Deadlines** screen displays. (See Figure 1)

Trustee action:

01-10034 Lori Jo Hock

The following is a list of all documents in this case which have pending scheduled events. Please select (by click box by each entry) those schedule events this event will satisfy.

3 Notice of 341(a) Meeting of Creditors (Chapter 13). 341(a) meeting to be held on 1/10/2001 at 02:00 PM at 1 Asheville 341 Meeting Rm. Proof of Claims due by 4/26/2001. (rcs,)

☒ 341 Meeting 01/10/2001

Next

Clear

Figure 1

- ◆ Satisfy the pending deadline by clicking on the check box to place a checkmark inside the box.
- ◆ Click **[Next]** to continue.

STEP 7 The **Final Docket Text** screen displays. (See Figure 2)

ECF Bankruptcy • Adversary • Query • Reports • Utilities

Trustee action:

01-10034 Lori Jo Hock

Docket Text: Modify as Appropriate.

Proceedings Memo from First Meeting Held - (Gray, David)

Next Clear

Figure 2

- ◆ A text window appears for the addition of text if desired (in this example, "Debtor Sworn; Plan Confirmed")

- ◆ Verify the accuracy of the Final Docket Text.
- ◆ Click **[Next]** to continue.

STEP 8 The **Final Approval** screen displays. (See Figure 3)

The screenshot shows the ECF Trustee action interface. At the top is a blue navigation bar with the ECF logo and links for Bankruptcy, Adversary, Query, Reports, and Utilities. Below the bar, the text "Trustee action:" is followed by a case link "01-10034 Lori Jo Hock". A gray box contains the "Docket Text: Final Text" section, which displays "Proceedings Memo from First Meeting Held - *DEBTOR SWORN; PLAN CONFIRMED.* (Gray, David)". Below this, a red and blue warning message states: "Attention!! Submitting this screen commits this transaction. You will have no further opportunity to modify this submission if you continue." At the bottom are two buttons: "Next" and "Clear".

Figure 3

- ◆ Verify the Final Docket Text. Read the warning message.
- ◆ If Final Docket Text is correct:
 - ◆ Click **[Next]** to continue and officially submit the entry.
- ◆ If Final Docket Text is incorrect:
 - ◆ Click the browser **[Back]** button to find the error(s) and then proceed with the event.
 - ◆ To abort or restart the transaction, return to **Step 1** and begin again.

STEP 9 The **Notice of Electronic Filing** displays.

- ◆ Clicking on the case number hypertext link on the **Notice of Electronic Filing** will present a docket report for the selected case.
- ◆ Clicking on the document number hypertext link will present the PDF image of the document chosen.
- ◆ Scroll down to see participants who have and have not registered for

electronic noticing on this case.

- ◆ To print a copy of this notice click the browser **[Print]** icon.
- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ You may also save the notice through the browser **File/Save** option.

Proceedings Memos - 341 Meetings

Part I-A: Memorandum from 341(a) Meeting HELD

To docket a batch entry into many cases that 341 meetings were held and plans were confirmed, take the following steps:

- STEP 1** Click the Bankruptcy hypertext link on the CM/ECF Main Menu Bar. The **Bankruptcy Events List** displays.
- STEP 2** Click the Batch Filings hypertext link.
- STEP 3** The **Case List Box** displays.
- ◆ Enter a list of case numbers, one per line. Enter the numbers in yy-nnnnn format including the dash.
 - ◆ Click **[Next]** to continue.
- STEP 4** The **Batch Filing Events** list displays.
- ◆ Click to highlight and select the event: *341 Held - Recommend Confirmation*.
 - ◆ Click **[Next]** to continue.
- STEP 5** The **Docket Text** displays.
- ◆ Review the Docket Text for accuracy.
 - ◆ Click **[Next]** to continue.
- STEP 6** The **Final Docket Text** displays.
- ◆ Review the **Final Docket Text**. Read the warning message.
 - ◆ If the Final Docket Text is correct:
 - ◆ Click **[Submit]** to officially submit the 341 meeting held, recommend confirmation entry on the docket report of all cases entered in **Step 3**.
 - ◆ If the Final Docket Text is incorrect:
 - ◆ Click the **[Back]** button to return to a previous screen and correct the error(s), or abort by beginning again at **Step 1**.
- STEP 7** The **Notice of Electronic Filing** displays.
- ◆ Clicking on the case number hypertext link on the **Notice of Electronic**

Filing will present a docket report for the selected case.

- ◆ Clicking on the document number hypertext link will present the PDF image of the document chosen.
- ◆ Scroll down to see participants who have and have not registered for electronic noticing on this case.

Proceedings Memos - 341 Meetings

Part II - Memorandum from 341(a) Meeting CONTINUED

In Chapter 13 cases, continued 341 meeting entries are individual entries into each case and cannot be docketed in batch. To docket a single 341 proceedings memo to indicate that a case is to be continued, follow these steps:

STEP 1 Click the [Bankruptcy](#) hypertext link on the CM-ECF Main Menu.

STEP 2 The **Bankruptcy Events** screen displays.

- ◆ Click the [Trustee/Bankruptcy Administrator](#) hypertext link.

STEP 3 The **Case Number** screen displays.

- ◆ Type the case number in yy-nnnnn format including the dash.
- ◆ Click **[Next]** to continue.

STEP 4 The **Document Selection** screen displays.

- ◆ Verify the case number and case name.
- ◆ If the case number and name do not match your document, click the browser **[Back]** button to re-enter the case number.

Note: If the system prompts that you have entered an invalid case number, click the browser **[Back]** button to try again. You may use the browser **[Back]** button at any time during this process to verify former screens until the final submission.

- ◆ Use the down arrow ▼ to the right of the box to scroll through the Event Type list to select the document to be filed. Click to highlight **Proceedings Memo 341 Held**.
- ◆ Click **[Next]** to continue.

STEP 5 The **Case Verification** screen displays.

- ◆ Verify the case name and number again.
- ◆ Click **[Next]** to continue.

STEP 6 The **Pending Deadlines** screen displays. (See Figure 4)

Trustee action:
[01-10034 Lori Jo Hock](#)

The following is a list of all documents in this case which have pending scheduled events. Please select (by click box by each entry) those schedule events this event will satisfy

3 341 Meeting of Creditors (Chapter 13), 341(a) meeting to be held on 1/10/2001 at 02:00 PM at 1-Ashcroft- 341 Meeting Rm. Proof of Claims due by 4/26/2001. (see...)

☒ 341 Meeting 01/10/2001

Figure 4

- ◆ Satisfy the pending deadline by clicking on the check box to place a checkmark inside the box.
- ◆ Click **[Next]** to continue.

STEP 7 The **Schedule a Deadline** screen displays. (See Figure 5)

ECF Bankruptcy • Adversary • Query • Reports

Trustee action:
[01-10034 Lori Jo Hock](#)

341 Meeting Date: 341 Meeting Time: ☐ AM ☐ PM

Location:

Figure 5

- ◆ Type the date the 341 meeting will be continued to in the **341 Meeting Date** field. Click on **Calendar** to assist with this process if desired.
- ◆ Type the time of the 341 meeting in the **Time** field.

- ◆ Click the radio button for **AM** or **PM**.
- ◆ Click the down arrow ▼ to reveal the list of 341 Meeting Locations. Choose the **Location** for the continued 341 meeting.
- ◆ Click **[Next]** to continue.

STEP 8 The **Final Docket Text** screen displays. (See Figure 6)

The screenshot shows the ECF Trustee action screen. At the top is a blue header with the ECF logo and navigation links: Bankruptcy, Adversary, Query, Reports, and Utilities. Below the header, the text "Trustee action:" is followed by a link "01-10034 Lori Jo Hock". A gray box contains the text "Docket Text: Modify as Appropriate." Below this, a yellow box displays the "Proceedings Memo Continuing First Meeting . 341(a) meeting to be held on 1/17/2001 at 02:00 PM at 1-Asheville 341 Meeting Rm. (Gray, David)". At the bottom are two buttons: "Next" and "Clear".

Figure 6

- ◆ Verify the accuracy of the Final Docket Text.
- ◆ Click **[Next]** to continue.

STEP 9 The **Final Approval** screen displays. (See Figure 7)

The screenshot shows the ECF Trustee action interface. At the top, there is a blue header with the ECF logo and navigation links: Bankruptcy, Adversary, Query, Reports, and Utilities. Below the header, the text "Trustee action:" is displayed in blue. Underneath, the case number "01-10034 Lori Jo Hock" is shown in purple. A gray box contains the text "Docket Text: Final Text". Below this, a yellow box displays the docket text: "Proceedings Memo Continuing First Meeting. 341(a) meeting to be held on 1/17/2001 at 02:00 PM at 1-Asheville 341 Meeting Rm. (Gray, David)". A red warning message follows: "Attention!! Submitting this screen commits this transaction. You will have no further opportunity to modify this submission if you continue." At the bottom, there are two buttons: "Next" and "Clear".

Figure 7

- ◆ Verify the Final Docket Text. Read the warning message.
- ◆ If Final Docket Text is correct:
 - ◆ Click **[Next]** to continue and officially submit the entry.
- ◆ If Final Docket Text is incorrect:
 - ◆ Click the browser **[Back]** button to find the error(s) and then proceed with the event.
 - ◆ To abort or restart the transaction, return to **Step 1** and begin again.

STEP 10 The **Notice of Electronic Filing** displays.

- ◆ Clicking on the case number hypertext link on the **Notice of Electronic Filing** will present a docket report for the selected case.
- ◆ Clicking on the document number hypertext link will present the PDF image of the document chosen.
- ◆ Scroll down to see participants who have and have not registered for electronic noticing on this case.
- ◆ To print a copy of this notice click the browser **[Print]** icon.

- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ You may also save the notice through the browser **File/Save** option.

Trustee Report Events

The following instructions will demonstrate the steps to follow in filing a Trustee Report Event. Although the example in this module specifically shows the *Chapter 12/13 Final Report and Account & MOTION FOR DISCHARGE*, the same steps would be followed for other reports such as the Chapter 12/13 Final Report and Account AFTER DISMISSAL OR CONVERSION.

Chapter 12/13 Final Report and Account & MOTION FOR DISCHARGE

- STEP 1** Click the [Bankruptcy](#) hypertext link on the CM/ECF main menu.
- STEP 2** The **Bankruptcy Events** screen displays.
- ◆ Click the [Trustee/Bankruptcy Administrator](#) hypertext link.
- STEP 3** The **Case Number** screen displays.
- ◆ Enter the case number in yy-nnnnn format.
 - ◆ Click **[Next]** to continue.
- STEP 4** The **Event Type** screen displays.
- ◆ Verify the case number and case name.
 - ◆ If the case number and name do not match your document, click the browser **[Back]** button to re-enter the case number.
- Note:** If the system prompts that you have entered an invalid case number, click the browser **[Back]** button to try again. You may use the browser **[Back]** button at any time during this process to verify former screens until the final submission.
- ◆ Use the down arrow ▼ to the right of the box to scroll through the Event Type list to select the document to be filed. Click to highlight **Chapter 12/13 Final Report & MOTION FOR DISCHARGE**.
 - ◆ Click **[Next]** to continue.
- STEP 5** The **PDF Document Selection** screen displays.
- ◆ Click **[Browse]**, then navigate to the directory where the appropriate PDF file is located. Double-click the PDF file to select it and associate it with the docket entry.
- Note:** If you wish to view the image before associating it with the docket entry to verify that you have chosen the correct file, first right click on the highlighted filename and select **Open** to view the image in Adobe Acrobat.

- ◆ The **Attachments to Document** option defaults to **No**. If you have attachments to this document, click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attachments to Documents* for more information).
- ◆ Click **[Next]** to continue.

STEP 6 The **Final Docket Text** screen displays. (See Figure 1)

CM/ECF Bankruptcy • Adversary • Query • Reports • Utilities

Trustee action:
[00-10013 Simon Van Dross](#)

Docket Text: Modify as Appropriate.

▼ **Trustee's Final Report and Account & Motion for Discharge with Certificate of Service . (rec,)**

Figure 1

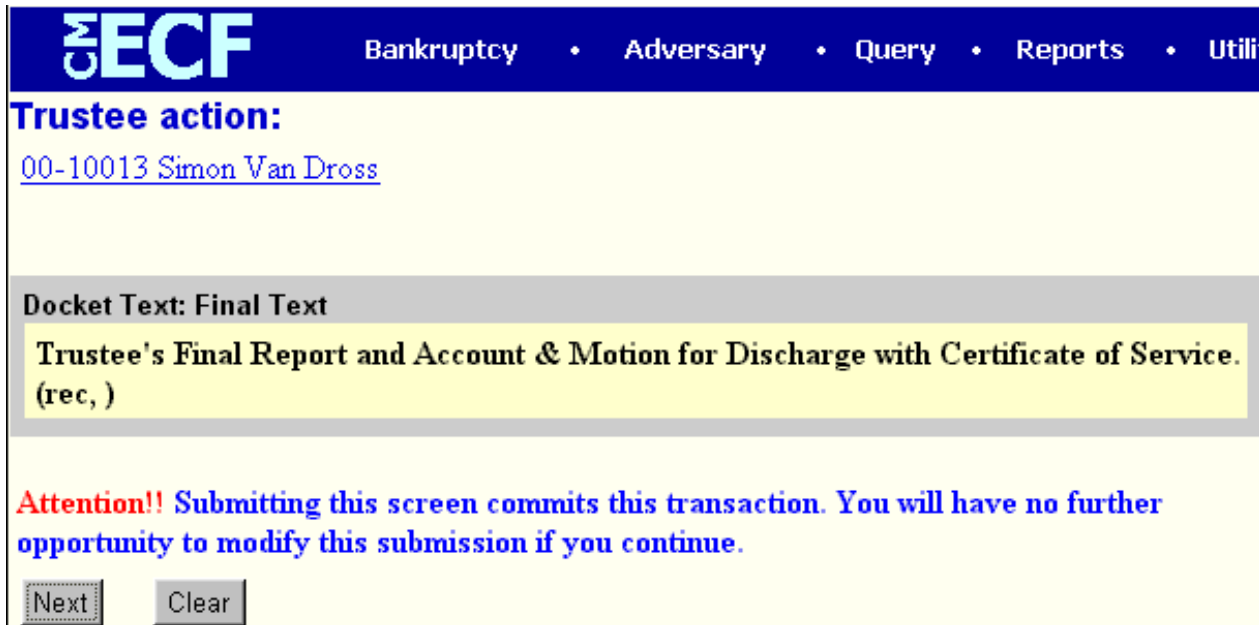
- ◆ A prefix box is available to add more detail to the docket text if required.
- Click the down arrow ▼ to display the prefix options. Options to choose from are:

[none]
 Agreed
 Alias
 Amended
 Emergency
 Ex Parte
 Scheduled with urgency
 Fifth
 Final
 First
 Fourth
 Interim
 Intervenor
 Joint
 Omnibus
 Opposition
 Proposed
 Sealed
 Second
 Sixth
 Supplemental
 Supporting
 Third

Third Party

- ◆ Verify the Final Docket Text.
- ◆ Click **[Next]** to continue.

STEP 7 The **Final Approval** screen displays. (See Figure 2)



ECF Bankruptcy • Adversary • Query • Reports • Utilities

Trustee action:
[00-10013 Simon Van Dross](#)

Docket Text: Final Text

Trustee's Final Report and Account & Motion for Discharge with Certificate of Service.
(rec,)

Attention!! Submitting this screen commits this transaction. You will have no further opportunity to modify this submission if you continue.

Figure 2

- ◆ Verify the Final Docket Text. Read the warning message.
- ◆ If the Final Docket Text is correct:
 - ◆ Click **[Next]** to continue and officially submit the document.
- ◆ If the Final Docket Text is incorrect:
 - ◆ Click the browser **[Back]** button to find the error(s) and proceed with the event.
 - ◆ To abort the event and begin again, return to **Step 1**.

STEP 8 The **Notice of Electronic Filing** screen displays.

- ◆ Scroll down to see participants who have and have not registered for electronic noticing on this case.
- ◆ Clicking on the case number hypertext link on the **Notice of Electronic Filing** will present the docket report for this case.
- ◆ Clicking on the document number hypertext link will present the PDF image

of the document just filed.

- ◆ To print a copy of this notice click the browser **[Print]** icon.
- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ You may also save the notice through the browser **File/Save** option.

Single-Part Motions/Applications

This module will demonstrate the steps to file a motion in the CM/ECF system. The example demonstrates the electronic filing of a motion that requests only one type of relief (relief of stay), and the example is filed along with a notice of opportunity for hearing. The same steps would be followed for other types of single-relief motions and applications. See also: *Multi-Part Motions/Applications* for guidance on filing a document with more than one relief (i.e. request for relief from stay *and* request for compensation). As a trustee, many of the commonly docketed motions will be found in either the [Trustee/Bankruptcy Administrator](#) category or the [Batch Filings](#) category. Look in these categories first when docketing a trustee event. If the event you are docketing is not available in either category, then use the Motions/Applications category.

Filing a Motion for Sanctions w/HEARING

- STEP 1** Click the [Bankruptcy](#) hypertext link on the CM/ECF Main Menu.
- STEP 2** The **Bankruptcy Events** screen displays.
- ◆ Click the [Motions/Applications](#) hypertext link.
- STEP 3** The **Case Number** screen displays.
- ◆ Enter the case number, including the hyphen, in yy-nnnnn format.
 - ◆ Click **[Next]** to continue.
- STEP 4** The **File a Motion** screen displays.
- ◆ Verify the case name and case number that is displayed.
 - ◆ If the case name and number are incorrect, press the browser **[Back]** button to re-enter the case number.
 - ◆ If the system prompts that you have entered an invalid case number, click the browser **[Back]** button to try again.
 - ◆ Click the down arrow ▼ to reveal the list of motions. Highlight *Sanctions w/ HEARING*. **Note:** You may also type the first letter of a relief (in this case 'S'), to immediately move to the list of reliefs that begin with a particular letter.
 - ◆ Click **[Next]** to continue.
- STEP 5** The **Joint Filing** screen displays.

- ◆ If this filing is joint with another attorney, click to place a check in the Joint Filing box. If this is not a joint attorney filing, no action is required.
- ◆ Click **[Next]** to continue.

STEP 6 The **Select the Party** screen displays.

- ◆ Click the down arrow ▼ to scroll the **Select the Party** box to locate the party filer (in this example, the trustee).
- ◆ Click to highlight and select the trustee.
- ◆ Click **[Next]** to continue

STEP 7 The **PDF Document Selection** screen displays.

- ◆ Click **[Browse]**, then navigate to the directory where the appropriate PDF file is located. Double-click the PDF file to select it and associate it with the docket entry.

Note: If you wish to view the image before associating it with the docket entry to verify that you have chosen the correct file, first right click on the highlighted filename and select **Open** to view the image in Adobe Acrobat.

- ◆ The **Attachments to Document** option defaults to **No**. If you have attachments to this document, click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attachments to Documents* for more information)
- ◆ Click **[Next]** to continue.

STEP 8 The **Hearing Information** screen displays. (See Figure 1)

Hearing Information

In order to enter a hearing date/time/location, you must obtain prior approval from the presiding judge. Contact Judge Hodges.

Hearing Date: Hearing Time: ☐ AM ☐ PM

Location:

Figure 1

- ◆ Based upon the information in the Notice of Hearing attached to the Motion for Sanctions, enter the hearing date, time and location.

- ◆ Click **[Next]** to continue.

STEP 9 The **Final Docket Text** screen displays. (See Figure 2)

File a Motion:

[97-10971 Carole Taylor Penland](#)

Docket Text: Modify as Appropriate.

Motion for Sanctions Against attorney for the debtor

Filed by Roberts & Stevens, P.A. . Hearing scheduled for 4/18/2001 at 09:30 AM at 1-Main Courtroom First Floor. (rec,)

Figure 2

- ◆ A supplemental text box window and the prefix box are available to add more detail to the docket text.
 - Click the down arrow ▼ to display the prefix options.
Options to choose from are:
 - [none]
 - Agreed
 - Alias
 - Amended
 - Emergency
 - Ex Parte
 - Scheduled with urgency
 - Fifth
 - Final
 - First
 - Fourth
 - Interim
 - Intervenors
 - Joint
 - Omnibus
 - Opposition
 - Proposed
 - Sealed
 - Second
 - Sixth
 - Supplemental
 - Supporting
 - Third
 - Third Party

- ◆ A supplemental text box window is provided to add more detail to the docket entry. In this example, we have added: “attorney for debtor” to indicate who the motion for sanctions is against.
- ◆ Click **[Next]** to continue.

STEP 10 The **Final Approval** screen displays.

- ◆ Verify the Final Docket Text. Read the warning message.
- ◆ If the Final Docket Text is correct,
 - ◆ Click **[Next]** to continue and officially submit document.
- ◆ If the final docket text is incorrect:
 - ◆ Click the browser **[Back]** button to find the error(s) and proceed with the event.
 - ◆ To abort or restart the transaction, return to **Step 1** and begin again.

STEP 11 The **Notice of Electronic Filing** screen displays.

- ◆ Scroll down to see participants who have and have not registered for electronic noticing on this case.
- ◆ Clicking on the case number hypertext link on the **Notice of Electronic Filing** will present the *Docket Report* for this case.
- ◆ Clicking on the document number hypertext link will present the *PDF Image* of the document just filed.
- ◆ To print a copy of this notice click the browser **[Print]** icon.
- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ You may also save the notice through the browser **File/Save** option.

Multi-Part Motions/Applications

This module will demonstrate the steps to following in filing a motion in the CM/ECF system that has more than one part (relief). The example illustrated shows a two-part Motion event: Objection to Claim and Objection to Exemption. Although these events are “objections” they are found in the Motions/Applications category. See also: *Single-Part Motions/Applications* for guidance on filing a document with one relief (i.e. Motion for Sanctions). As a trustee, many of the commonly docketed motions will be found in either the [Trustee/Bankruptcy Administrator](#) category or the [Batch Filings](#) category. Look in these categories first when docketing a trustee event. If the event you are docketing is not available in either category, then use the Motions/Applications category.

Objection to Claim and Objection to Exemptions

STEP 1 Click the [Bankruptcy](#) hypertext link on the CM/ECF Main Menu.

STEP 2 The **Bankruptcy Events** screen displays.

- ◆ Click the [Motions/Applications](#) hypertext link.

STEP 3 The **Case Number** screen displays.

- ◆ Enter the case number, including the hyphen, in yy-nnnnn format.
- ◆ Click **[Next]** to continue.

STEP 4 The **Document Selection** screen displays.

- ◆ Verify the case name and case number that is displayed.
 - ◆ If the case name and number are incorrect, press the browser **[Back]** button to re-enter the case number.
 - ◆ If the system prompts that you have entered an invalid case number, click the browser **[Back]** button to try again.
- ◆ Scroll the **File a Motion** box; click to highlight *Objection to Claim*. This is event is selected when the Objection to Claim is accompanied by a Notice of Opportunity for Hearing.
- ◆ While keeping the **[Ctrl]** key depressed, scroll to find Relief From Stay (fee); click to highlight *Objection to Exemption*. This is event is selected when the Objection to Exemption is accompanied by a Notice of Opportunity for

Hearing. (See Figure 1)

[00-10441 Daniel E. Plowman and Gina R. Plowman](#)

Moratorium
Moratorium w/HEARING
Objection to Claim
Objection to Claim w/HEARING
Objection to Confirmation w/HEARING
Objection to Exemption
Objection to Valuation of Collateral
Objections to Debtor's Claim of Exemptions w/HEARING (Ch 7 & 11)

Next Clear

Figure 1

Note: Objections to Claim can be submitted with a Notice of Hearing; if this is the case, select the event *Objection to Claim w/HEARING*. For Chapter 7 and 11 cases, the event: *Objections to Debtor's Claim of Exemptions w/HEARING* is available if the document is accompanied by a Notice of Hearing.

- ◆ Click **[Next]** to continue.

STEP 5 The **Joint Filing** screen displays.

- ◆ The case number and debtor name display again for verification.
- ◆ If this filing is joint with another attorney, click to place a check in the Joint Filing box. If this is not a joint attorney filing, no action is required.
- ◆ Click **[Next]** to continue.

STEP 6 The **Select the Party** screen displays.

- ◆ Click the down arrow ▼ to scroll the **Select the Party** box to locate the party filer (in this example, the trustee).
- ◆ Click to highlight and select the trustee.
- ◆ Click **[Next]** to continue

STEP 7 The **PDF Document Selection** screen displays.

- ◆ Click **[Browse]**, then navigate to the directory where the appropriate PDF file is located. Double-click the PDF file to select it and associate it with the docket entry.

Note: If you wish to view the image before associating it with the docket entry to verify that you have chosen the correct file, first right click on the highlighted filename and select **Open** to view the image in Adobe Acrobat.

- ◆ The **Attachments to Document** option defaults to **No**. If you have attachments to this document, click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attachments to Documents* for more information)
- ◆ Click **[Next]** to continue.

STEP 8 The **Notice** screen displays. (See Figure 2)

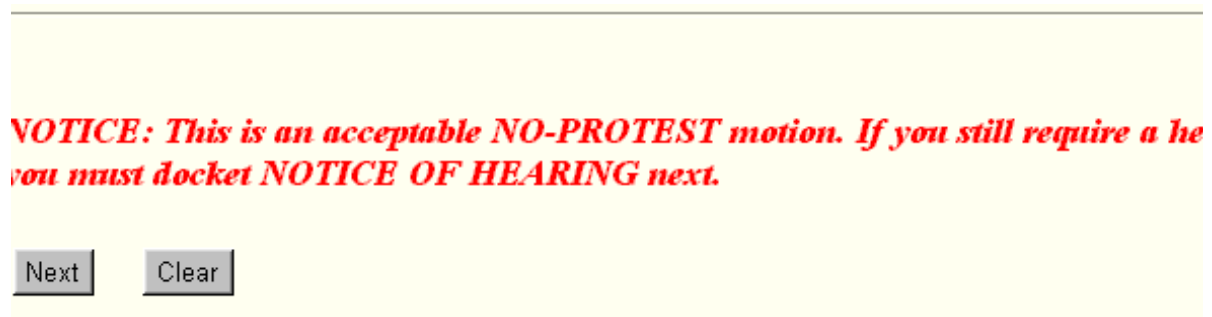


Figure 2

- ◆ This screen reminds you that the event chosen is normally submitted no-protest. If a hearing is required, docket the event: Notice of Hearing, or choose the appropriate Motion event "w/HEARING".
- ◆ Click **[Next]** to continue.

STEP 9 The **Final Docket Text** screen displays. (See Figure 3)

Docket Text: Modify as Appropriate.

Objection to Claim of Creditor: with Notice of Opportunity for Hearing. If a response or objection is filed - DUE: , a hearing will be held on DATE: , TIME: , LOCATION: , Objection to Exemption Filed by Roberts & Stevens, P.A. . (rec,)

Figure 3

- ◆ A supplemental text box window is available to add more detail to the docket text. Type the name of the creditor whose claim is disputed.
- ◆ Type the date or number of days, as specified in the attached Notice of Opportunity for Hearing, through which objections must be filed.
- ◆ Type the date, time and location, as specified in the attached Notice of Opportunity for Hearing, on which the hearing will be held if responses or objections are filed.
- ◆ Click **[Next]** to continue.

STEP 10 The **Final Approval** screen displays.

- ◆ Verify the Final Docket Text. Read the warning message.
- ◆ If the Final Docket Text is correct:
 - ◆ Click **[Next]** to continue and officially submit the document.
- ◆ If the Final Docket Text is incorrect:
 - ◆ Click the browser **[Back]** button to find the error(s) and proceed with the event.
- ! To abort or restart the transaction, return to **Step 1** and begin again.

STEP 11 The **Notice of Electronic Filing** screen displays.

- ◆ Scroll down to see participants who have and have not registered for electronic noticing on this case.
- ◆ Clicking on the case number hypertext link on the **Notice of Electronic**

Filing will present the *Docket Report* for this case.

- ◆ Clicking on the document number hypertext link will present the *PDF Image* of the document just filed.
- ◆ To print a copy of this notice click the browser **[Print]** icon.
- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ You may also save the notice through the browser **File/Save** option.

Responses/Objections/Answers

Trustees file a variety of responses, objections and answers. The following instructions will guide you through the Electronic Case Filing (ECF) system for docketing events such as responses, objections and answers. Although the example in this module demonstrates a Trustee's Response to a Motion for Relief from Stay, the same steps would be followed for any other type of response, reply or answer.

Trustee's Response to Motion for Relief from Stay

STEP 1 Click the [Bankruptcy](#) hypertext link on the CM/ECF Main Menu.

Note: If the response, objection or answer is in an adversary proceeding, choose the [Adversary](#) hypertext link.

STEP 2 The **Bankruptcy Events** screen displays.

◆ Click the [Answer/Response](#) hypertext link.

STEP 3 The **Answer/Response** screen displays.

◆ Click the [Reference an Existing motion/application](#) hypertext link.

STEP 4 The **Case Number** screen displays.

◆ Enter the case number in yy-nnnnn format.
◆ Click **[Next]** to continue.

STEP 5 The **Document Type** screen displays. (See Figure 1)

ECF Bankruptcy • Adversary • Query •

File an answer to a motion

[00-10005-grh Daniel Gene Hinson](#)

Amended Answer to Complaint
Objection/Request for Hearing
Response/Objection
Response/Request for Hearing
X-Other Document

Figure 1

- ◆ Verify the case number and case name.
 - ◆ If the case number and name do not match your document, click the browser **[Back]** button to re-enter the case number.

Note: If the system prompts that you have entered an invalid case number, click the browser **[Back]** button to try again. You may use the **[Back]** button at any time during this docketing process to verify former screens until the final submission.

- ◆ Click the down arrow ▼ in the **Document Type** pick list to reveal list document options. The options are:
 - ◆ *Amended Answer to Complaint*
 - ◆ *Objection/Request for Hearing*
 - ◆ *Response/Objection*
(**Note:** No hearing will be set if this is selected)
 - ◆ *Response/Request for Hearing*
 - ◆ *X-Other Document*
- ◆ Click to highlight the **Response/Request for Hearing** option. In this example, a response to a motion for relief from stay is being docketed. The matter will be scheduled on the hearing calendar during the docketing of this event.

Note: If you are responding to a document that is already on the calendar (i.e. the motion was filed with a notice of hearing, or there has already been a previous response to the motion), choose Response/Objection. If in doubt, choose Response/Request for Hearing. It is better that the matter be on the calendar twice instead of not at all!
- ◆ Click **[Next]** to continue.

STEP 6 The **Joint Filing** screen displays.

- ◆ If the document is being filed jointly with another attorney, click inside the radio box to place a check mark.
- ◆ If this is not a joint filing, then no further action is necessary.
- ◆ Click **[Next]** to continue.

STEP 7 The **Select the Party** screen displays.

- ◆ Click to highlight the name of the Trustee filing the response.
- ◆ Click **[Next]** to continue.

STEP 8 The **PDF Document Selection** screen displays.

- ◆ Click **[Browse]**, then navigate to the directory where the appropriate PDF file is located. Double-click the PDF file to select it.

Note: If you wish to view the image before selecting to be sure you have chosen the correct file, before double-clicking, first right click on the highlighted filename and click on **open**. You can view the image in Adobe Acrobat, then close Adobe Acrobat when you have finished viewing the image.
- ◆ The **Attachments to Document** option defaults to **No**. If you have attachments to this document, click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attachments to Documents* for more information).
- ◆ Click **[Next]** to continue.

STEP 9 The **Hearing Information** screen displays. (See Figure 2)

Figure 2

- ◆ Based upon the information set forth in the Notice of Opportunity for Hearing attached to the Motion for which this response pertains:
 - ◆ Enter the hearing date. You may click on the **Calendar** button to assist in this process.
 - ◆ Enter the time of the hearing. Select the appropriate radio box for either **A.M.** or **P.M.**
 - ◆ Click on the down arrow ▼ to the right of the field box and highlight the location as set forth in the Notice.

- ◆ Click inside the radio box to place a check mark indicating that this filing **does** refer to an existing document in the case.

Note: Disregard the notice that would seem to indicate that you would not need to select the radio box since the document being filed is a response. **It is necessary** to select the box to indicate reference to an existing document in order to establish correct document linkage and scheduling of the hearing.

- ◆ Click **[Next]** to continue.

STEP 10 The **Document Category** screen displays. (See Figure 3)

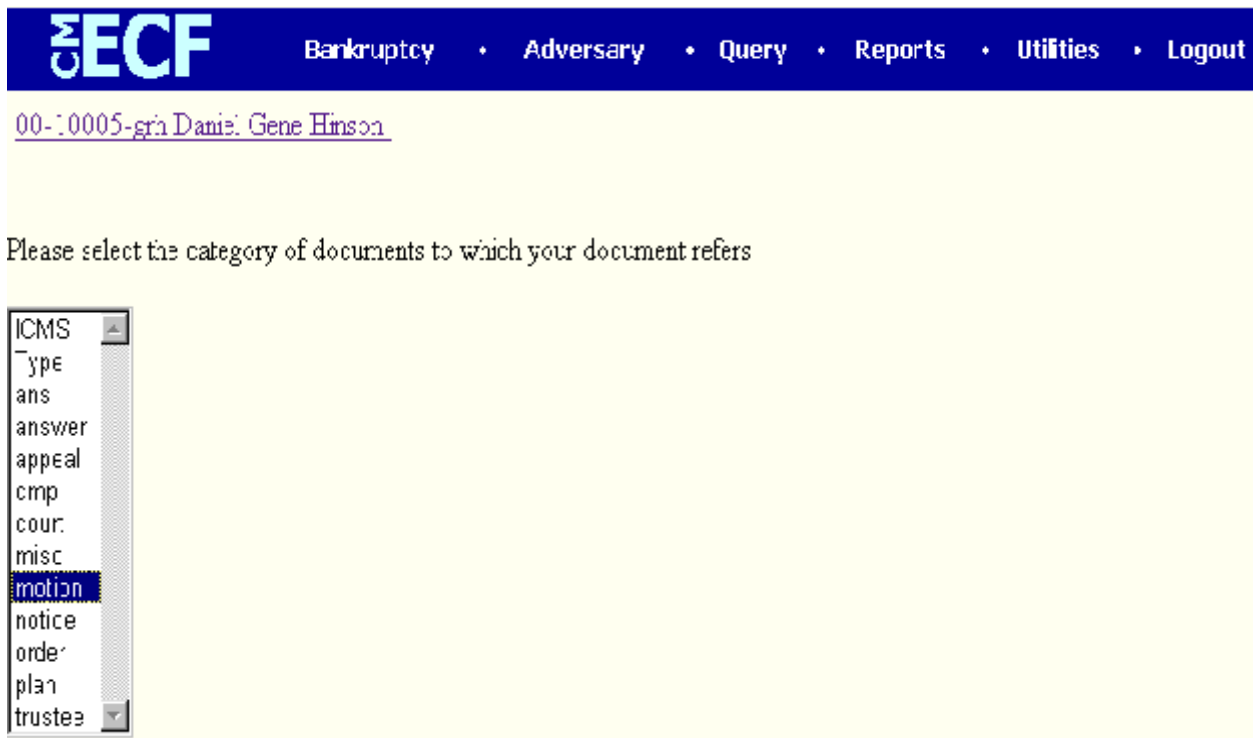


Figure 3

- ◆ Click to highlight the category of documents to which this response refers (in this example, 'motion').
Hint: To make it easier to find the document to which the response is to be linked, you may select more than one category or select all categories.
- ◆ Click **[Next]** to continue.

STEP 11 The **Pending Motions** screen displays. (See Figure 4)

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout

File an answer to a motion:
[00-10005-grh Daniel Gene Hinson](#)

Include	Date	#	Docket Text
<input type="checkbox"/>	11/15/2000	2	Motion for Relief from Stay with Notice of Opportunity for Hearing - PROPERTY DESCRIPTION: <i>1999 Honda Accord</i> . If a response or objection is filed DUE: <i>15 days</i> , a hearing will be held on DATE: <i>12/20/00</i> , TIME: <i>9:30 AM</i> , LOCATION: <i>Asheville, NC</i> Filed by American Express Travel Related Services Co., Inc. (rec,) (Entered: 11/29/2000)

Figure 4

- ◆ Select the motion you wish to answer by clicking in the box next to the date (the "include" column). This will link the response to the motion.

STEP 12 The **Schedule Effects** screen displays. (See Figure 5)

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout

The following schedule records will be associated with the docket entries specified below

Type	hrg
Date	12/20/2000
Time	09:30
Location	1-Main Courtroom, First Floor
Prompt	

Select from the following docket entries those which the above schedule records should be associated with

☐ Create Schedule record for current docket entry

☒ Motion for Relief from Stay with Notice of Opportunity for Hearing - PROPERTY DESCRIPTION: *1999 Honda Accord*. If a response or objection is filed - DUE: *15 days*, a hearing will be held on DATE: *12/20/00*, TIME: *9:30 AM*, LOCATION: *Asheville, NC* Filed by American Express Travel Related Services Co., Inc. (rec,) (Entered: 11/29/2000)

Figure 5

- ◆ This screen will schedule the hearing. Verify the hearing date, time and location.
- ◆ Select the radio box to indicate hearing on the **motion**. **Do not** Create Schedule record for the *current* docket entry (the response). The hearing is scheduled on the Motion, not on the Response.

Note: The system will default to Create Schedule record for current

docket entry. This must be *un-selected*. Then select the **motion** so that the hearing will be properly scheduled.

- ◆ Click **[Next]** to continue.

STEP 13 The **Final Docket Text** screen displays.

- ◆ A prefix box is available to add more detail to the docket text if required.

Click the down arrow ▼ to display the prefix options. Options to choose from are:

[none]
Agreed
Alias
Amended
Emergency
Ex Parte
Scheduled with urgency
Fifth
Final
First
Fourth
Interim
Intervenors
Joint
Omnibus
Opposition
Proposed
Sealed
Second
Sixth
Supplemental
Supporting
Third
Third Party

- ◆ Verify the accuracy of the Final Docket Text.
- ◆ Click **[Next]** to continue.

STEP 14 The **Final Approval** screen displays.

- ◆ If the Final Docket Text is correct:
 - ◆ Click **[Next]** to continue and officially submit the document.
- ◆ If the Final Docket Text is incorrect:
 - ◆ Click the browser **[Back]** button to find the error(s) and then proceed with the event.
 - ◆ To abort or restart the transaction, return to **Step 1** and begin again.

STEP 15 The **Notice of Electronic Filing** screen displays.

- ◆ Clicking on the case number hypertext link on the **Notice of Electronic Filing** will present the docket report for this case.
- ◆ Clicking on the document number hypertext link will present the PDF image of the document just filed.
- ◆ Scroll down to see participants who have and have not registered for electronic noticing on this case.
- ◆ To print a copy of this notice click the browser **[Print]** icon.
- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ You may also save the notice through the browser **File/Save** option.

Short Steps:

- | | |
|---------|---|
| Step 1 | Click Bankruptcy |
| Step 2 | Click Answer/Response |
| Step 3 | Enter Case Number |
| Step 4 | Select Type of Response |
| Step 5 | Indicate if Joint Attorney Filing |
| Step 6 | Select Party Filer |
| Step 7 | Associate PDF Document |
| Step 8 | Schedule Hearing |
| Step 9 | Link to Document being Answered |
| Step 10 | Verify Hearing Information; Schedule Hearing on <u>Motion</u> . |
| Step 11 | Edit/Verify Final Docket Text |

Batch Filings

CM/ECF Batch Filings category was developed to expedite the filing of the same type of document in multiple cases. This is accomplished in one docket entry.

The Batch Filings feature offers the association of a different PDF image for each case listed.

The Trustee's Motion for Allowance of Claim is a classic example of a pleading that is used in Batch Filings. The same docket text is needed in many cases, however each case will also need its own unique PDF image.

This module demonstrates the steps to take to docket a Trustee's Motion for Allowance of Claims in multiple cases using [Batch Filings](#). The same steps would be followed for other types of allowable Batch Filings events.

Note: Many events listed in the Batch Filings category are not found in any other category. The Batch Filings category would be used even if there were only one case entry to be made.

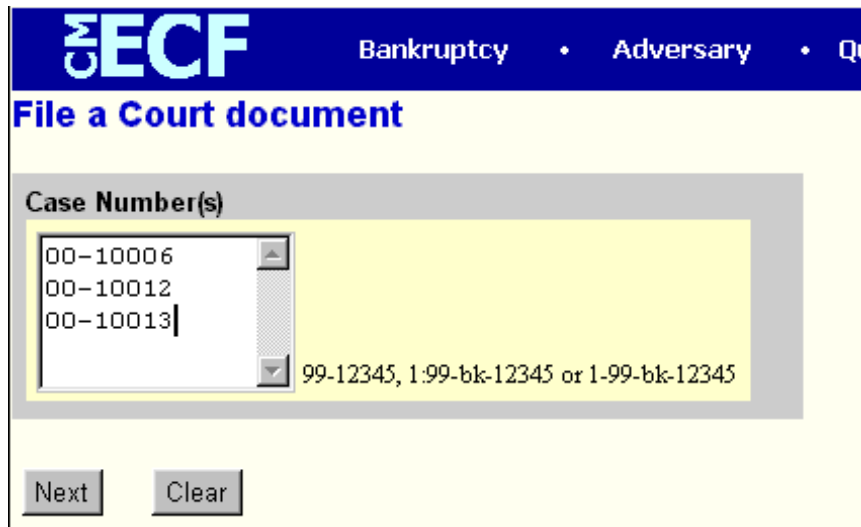
Motion for Allowance of Claims

STEP 1 Click the [Bankruptcy](#) hypertext link on the CM/ECF Main Menu.

STEP 2 The **Bankruptcy Events** screen displays.

◆ Click the [Batch Filings](#) hypertext link.

STEP 3 The **Case Number List Box** screen displays. **(See Figure 1)**

**Figure 1**

- ◆ Type each case number in the Extended Window box.

Note: If this entry will be filed in many cases, it is suggested that the list of case numbers be copied to the clipboard after they are typed. This is because if any of the case numbers entered in CM-ECF are erroneous, an error message appears and the valid case numbers already entered will be lost but for the final case number typed. If that happens, one can easily paste the list into the Extended Window Box again, make the corrections, and continue on quickly without having to re-type the entire list. To copy the case numbers to the clipboard:

- ◆ Type the list of case numbers.
- ◆ Highlight the list with your mouse
- ◆ Press the keystroke **[Ctrl + C]** to copy the list.
- ◆ Use the keystroke **[Ctrl + V]** to paste the list of case numbers in the box.
- ◆ Click **[Next]** to continue.

STEP 4 The **Document Selection** screen displays. (See Figure 2)

File a Court document

[00-10006-jcw Thadeus Morgan Brown](#)

[00-10012 Luther Holmes](#)

[00-10013 Simon Van Dross](#)

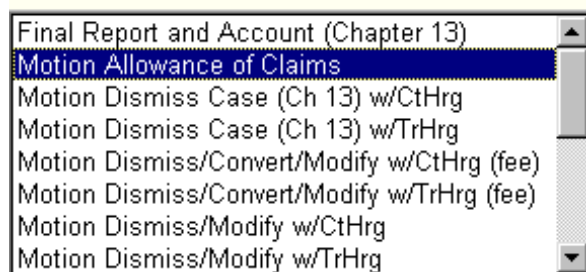


Figure 2

- ◆ Verify each case number and case name.
- ◆ If any of the case numbers and names are incorrect, click the browser **[Back]** button. Paste the case number list into the Extended Window Box, and then find and correct the erroneous case numbers.

Note: If the system prompts that you have entered an invalid case number, click the browser **[Back]** button to try again. You may use the browser **[Back]** button at any time during this process to verify former screens until the final submission.

- ◆ Use the down arrow ▼ to the right of the box to scroll through the event list to select the type of document to be filed (in this example, Motion for Allowance of Claims).

- ◆ Click **[Next]** to continue.

STEP 5 The **PDF Document Association** screen displays. (See Figure 3)

Figure 3

- ◆ Click **[Browse]**, then navigate to the directory where the appropriate PDF file is located. Double-click the PDF file to select it.

Note: If you wish to view the image before selecting to be sure you have chosen the correct file, before double-clicking, first right click on the highlighted filename and click on **open**. You can view the image in Adobe Acrobat, then close Adobe Acrobat when you have finished viewing the image.

- ◆ Associate a PDF Image for each case listed.

Note: Attachments cannot be added when utilizing [Batch Filings](#).

- ◆ Click **[Next]** to continue.

STEP 6 The **Final Docket Text** screen displays. (See Figure 4)

Figure 4

- ◆ Verify the accuracy of the Final Docket Text.
- ◆ Click **[Next]** to continue.

STEP 7 The **Final Approval** screen displays. (See Figure 5)

CM/ECF Bankruptcy • Adversary • Query • Reports • Ut

File a Court document: 00-10006-jcw Thadeus Morgan Brown 00-10006-10013 Simon Van Dross

Docket Text: Final Text

Trustee's Motion for Allowance of Claims w/Notice of Opportunity of Hearing. (Gray, David)

Attention!! Submitting this screen commits this transaction. You will have no further opportunity to modify this submission if you continue.

Figure 5

- ◆ Verify the Final Docket Text. Read the warning message.
- ◆ If the Final Docket Text is correct:
 - ◆ Click **[Next]** to continue and officially submit the document.
- ◆ If The Final Docket Text is incorrect:
 - ◆ Click the browser **[Back]** button to find the error(s) and then proceed with the event.
 - ◆ To abort or restart the transaction, return to **Step 1** and begin again.

STEP 8 The **Notice of Electronic Filing** displays.

- ◆ One Notice is received for all cases.
- ◆ Clicking on the case number hypertext link on the **Notice of Electronic Filing** will present a docket report for the selected case.

- ◆ Clicking on the document number hypertext link will present the PDF image of the document chosen.
- ◆ Scroll down to see participants who have and have not registered for electronic noticing on this case.
- ◆ To print a copy of this notice click the browser **[Print]** icon.
- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ You may also save the notice through the browser **File/Save** option.

Trustee Notices

The [Trustee/Bankruptcy Administrator](#) hypertext link lists various trustee notices which the trustee submits to the court. Other Notices are available to the Trustee through the hypertext link: [Notices](#). The following instructions will guide you through the steps to file a notice event in the [Trustee/Bankruptcy Administrator](#) category. Although the example in this module specifically shows the *Trustee's Notice to Terminate Wage Deduction*, the same steps would be followed for other types of notices. If you are filing a notice for which there is no event code in either [Trustee/Bankruptcy Administrator](#) or [Notices](#) category, choose **X-Notice (Other)** (found in the [Notices](#) category).

Notice To Terminate Wage Deduction

- STEP 1** Click the [Bankruptcy](#) hypertext link from the CM/ECF main menu.
- STEP 2** The **Bankruptcy Events** screen displays.
- ◆ Click the [Trustee/Bankruptcy Administrator](#) hypertext link.
- STEP 3** The **Case Number** screen displays.
- ◆ Enter the case number in yy-nnnnn format.
 - ◆ Click **[Next]** to continue.
- STEP 4** The **Event Type** screen displays.
- ◆ Verify the case number and case name.
 - ◆ If the case number and name do not match the document, click the browser **[Back]** button to re-enter the case number.
- Note:** If the system prompts that you have entered an invalid case number, click the browser **[Back]** button to try again. You may use the browser **[Back]** button at any time during this process to verify former screens until the final submission.
- ◆ Use the down arrow ▼ to the right of the Event Type box to scroll through the list of events and select the document to be filed. Click to highlight **Notice to Terminate Wage Deduction**.
 - ◆ Click **[Next]** to continue.

STEP 5 The **PDF Document Selection** screen displays.

- ◆ Click **[Browse]**, then navigate to the directory where the appropriate PDF file is located. Double-click the PDF file to select it.

Note: If you wish to view the image before associating it with this docket entry, before double-clicking, first right click on the highlighted filename and click on ***open***. You can view the image in Adobe Acrobat, then close Adobe Acrobat when you have finished viewing the image.

- ◆ The **Attachments to Document** option defaults to **No**. If you have attachments to this document, click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attachments to Documents* for more information).
- ◆ Click **[Next]** to continue.

STEP 6 The **Final Docket Text** screen displays.

- ◆ Verify the accuracy of the Final Docket Text.
- ◆ Click **[Next]** to continue.

STEP 7 The **Final Approval** screen displays.

- ◆ Verify the Final Docket Text. Read the warning message.
- ◆ If the Final Docket Text is correct:
 - ◆ Click **[Next]** to continue and officially submit document.
- ◆ If the Final Docket Text is incorrect:
 - ◆ Click the browser **[Back]** button to find the error(s) and proceed with the event.
 - ◆ To abort or restart the transaction, return to **Step 1** and begin again.

STEP 8 The **Notice of Electronic Filing** screen displays.

- ◆ Clicking on the case number hypertext link on the **Notice of Electronic Filing** will present the Docket Report for this case.
- ◆ Clicking on the document number hypertext link will present the *PDF Image* of the document just filed.

- ◆ Scroll down to see participants who have and have not registered for electronic noticing on this case.
- ◆ To print a copy of this notice click the browser **[Print]** icon.
- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ You may also save the notice through the browser **File/Save** option.

Amended Documents

This module demonstrates the steps to take to amend certain types of documents. Although this example shows the amending of a Motion for Relief From Stay, the same steps would be followed to amend other types of fee-based motions.

Note: If you are amending a motion that did **not** originally require a fee, or other document such as a notice or report, docket the event as usual and choose “amended” from the pick list in the Final Docket Text. However, do not use this method to amend a fee-based motion, as re-docketing the fee-based event will trigger a flag that may inadvertently cause the court to charge a filing fee for the amended motion where none is actually due.

To amend debtor schedules, there are separate events in the [Other](#) category: *Amended Schedules (Other)*, *Amended Voluntary Petition*, and *Amendment-Adding new names or changes amounts (fee)*.

Amended Motion for Relief From Stay

- STEP 1** Click the [Bankruptcy](#) hypertext link on the CM/ECF Main Menu.
- STEP 2** The **Bankruptcy Events** screen displays.
- ◆ Click the [Other](#) hypertext link.
- STEP 3** The **Case Number** screen displays.
- ◆ Enter the case number in yy-nnnnn format.
 - ◆ Click **[Next]** to continue.
- STEP 4** The **Select the Party** screen displays.
- ◆ Verify the name and case number displayed.
 - ◆ If the case name and number are incorrect, click the browser **[Back]** button to re-enter the case number.
 - ◆ If the system prompts that you have entered an invalid case number, click the browser **[Back]** button to try again.
- Note:** You may use the browser **[Back]** button at any time during this process to verify former screens until the final submission.
- ◆ Click to highlight the filing party(ies) for this document. More than one party may be selected by holding down the **Ctrl** key while clicking party names.
 - ◆ Click **[Next]** to continue.
- STEP 5** The **Event Type** screen displays.

- ◆ Click the down arrow ▼ to scroll through the list of Event Types.
- ◆ There are four types of amended documents:
 - ◆ *Amended Document (other)*
 - ◆ Use this option when you are amending any type of motion that, when originally filed, a fee was paid.
 - ◆ *Amended Schedules (other)*
 - ◆ Use this option when you are amending schedules or related items such as Statement of Financial Affairs, Statement of Intention, or any other items that were filed with the original petition and schedules (except schedules D, E, and F)
 - ◆ *Amended Voluntary Petition*
 - ◆ Use this option to amend the two-page voluntary petition.
 - ◆ *Amendment -Adding new names or changing amounts (fee)*
 - ◆ Use this option to amend Schedules D, E, and/or F. There is a fee to amend these schedules.
- ◆ In this example we will be amending a Motion For Relief From Stay. Therefore, click to highlight *Amended Document (other)*.
- ◆ Click **[Next]** to continue.

STEP 6 The **PDF Document Selection** screen displays.

- ◆ Click **[Browse]**, then navigate to the directory where the PDF file is located for the amended document. Double-click the PDF filename to select it and associate it with this docket entry.

Note: If you wish to view the image before associating it with the docket entry to verify that you have chosen the correct file, first right click on the highlighted filename and select **Open** to view the image in Adobe Acrobat.
- ◆ The **Attachments to Document** option defaults to **No**. If you have attachments to the document, click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attachments to Documents* for instructions, if necessary).
- ◆ Click **[Next]** to continue.

STEP 7 The **Document Linking** screen displays. **(See Figure 1)**

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Links

Miscellaneous:

00-50022 Keitha Ruth Price Pennell

☒ Does this filing refer to an existing document in this case? (If yes, click on the box)

NOTE: If the event you are docketing is an answer/response, you will be prompted on a subsequent screen motion. Therefore, do not click on this box to establish a relationship to the motion you are answering.

Next Clear

Figure 1

- ◆ Click inside the box to place a checkmark and indicate that this filing does refer to an existing document. This will allow you to indicate what document is being amended, and by referring to that document a linkage will be created in the system.
- ◆ Click **[Next]** to continue.

STEP 8 The **Document Category** screen displays. (See Figure 2)

00-50022 Keitha Ruth Price Pennell

Please select the category of documents to which your document refers.

ICMS
Type
ans
answer
appeal
cmp
court
misc
motion
notice
order
plan
trustee

Next Clear

Figure 2

- ◆ Click to highlight and select the category of documents to which this

amended document refers. The document being amended in this example is a Motion for Relief From Stay. That document was docketed by choosing the *Motion* category. Therefore, the *Motion* category will be selected here so that the system will find and display the Motion to which this amended document needs to be linked.

- ◆ Click **[Next]** to continue.

STEP 9 A **Document List** displays.

- ◆ A list of documents in the chosen category are displayed.
 - ◆ Click inside the box next to the document being amended to include (link) this *amended* document to the previously filed document.
 - ◆ Click **[Next]** to continue.
- ◆ If the document you wish to amend does not display on the list:
 - ◆ Verify that you are docketing in the correct case.
 - ◆ Click the browser **[Back]** button and return to **Step 8** to choose a different Document Category.

Note: You can choose more than one document category at the same time by holding down the **Ctrl** key and clicking on various categories.

- ◆ If necessary, abort the entry and begin again at **Step 1**.

STEP 10 The **Final Docket Text** screen displays. (See Figure 3)

ECF Bankruptcy • Adversary • Query • Reports • Utilities

Miscellaneous:
[00-50022 Keitha Ruth Price Pennell](#)

Docket Text: Modify as Appropriate.

Amendment to (related document(s)[9]) filed by Attorney Karen Heavner of 401 W. Trade Street on behalf of Green Tree Financial Servicing Corporation . (Heavner, Attorney)

Figure 3

- ◆ A supplemental text displays. Type the name of the document being

amended (in this example: *Motion for Relief From Stay*).

- ◆ Note that the Docket Text reflects that this Amendment is related to Document [9], the original Notice that is now being amended through this entry.
- ◆ Verify the accuracy of the Final Docket Text.
- ◆ Click **[Next]** to continue.

STEP 11 The **Final Approval** screen displays.

- ◆ Verify the Final Docket Text. Read the warning message.
- ◆ If the Final Docket Text is correct:
 - ◆ Click **[Next]** to continue and officially submit the document.
- ◆ If the Final Docket Text is incorrect:
 - ◆ Click the browser **[Back]** button to find the error(s) and proceed with the event.
 - ◆ To abort the event and begin again, return to **Step 1**.

STEP 12 The **Notice of Electronic Filing** screen displays.

- ◆ Scroll down to see participants who have and have not registered for electronic noticing on this case.
- ◆ Clicking on the case number hypertext link on the **Notice of Electronic Filing** will present the docket report for this case.
- ◆ Clicking on the document number hypertext link will present the PDF image of the application just filed.
- ◆ To print a copy of this notice click the browser **[Print]** icon.
- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ You may also save the notice through the browser **File/Save** option.

Adversary Proceeding Case Opening

Opening an adversary proceeding involves entering the necessary information regarding the plaintiff and defendant, along with basic statistical data. The lead event (usually the complaint) is incorporated into this process and will not need to be docketed separately. This module demonstrates the steps to take to open an adversary proceeding in CM/ECF.

STEP 1 Click the Adversary hypertext link on the CM/ECF Main Menu Bar.

STEP 2 The **Adversary Events** screen displays.

- ◆ Click the Open an AP/MP Case hypertext link.

STEP 3 The **Case Data** screen displays. (See Figure 1)



Figure 1

- ◆ Note that the case number field is inaccessible. A case number will be received after the transaction has been completed.
- ◆ Click the down arrow ▼ to reveal the list of **Office** (division) options. Select the same division to which the related base case is assigned.
- ◆ The current date is displayed in the **Date Filed** field. This date cannot be changed.
- ◆ Click the down arrow ▼ to reveal the list of **Case Type** options. Choose either **ap** for adversary proceeding or **mp** for miscellaneous proceeding.
- ◆ Click the down arrow ▼ to reveal the list of **Complaint** options: either **y** for yes or **n** for no. This field signifies the lead event for this proceeding. If

filing something other than a complaint, such as a Notice of Removal, change the **y** to **n**.

STEP 4 The **Search Party** screen displays.

- ◆ Enter a social security number, tax identification number, or last/business name to search for the party to be added to the case. *It is recommended that you add parties to the case in the following order: Plaintiffs, defendants, then interested parties/other as applicable.*
- ◆ Click **[Search]** to continue.

STEP 5 The **Party Search Results** screen displays. (See Figure 2)

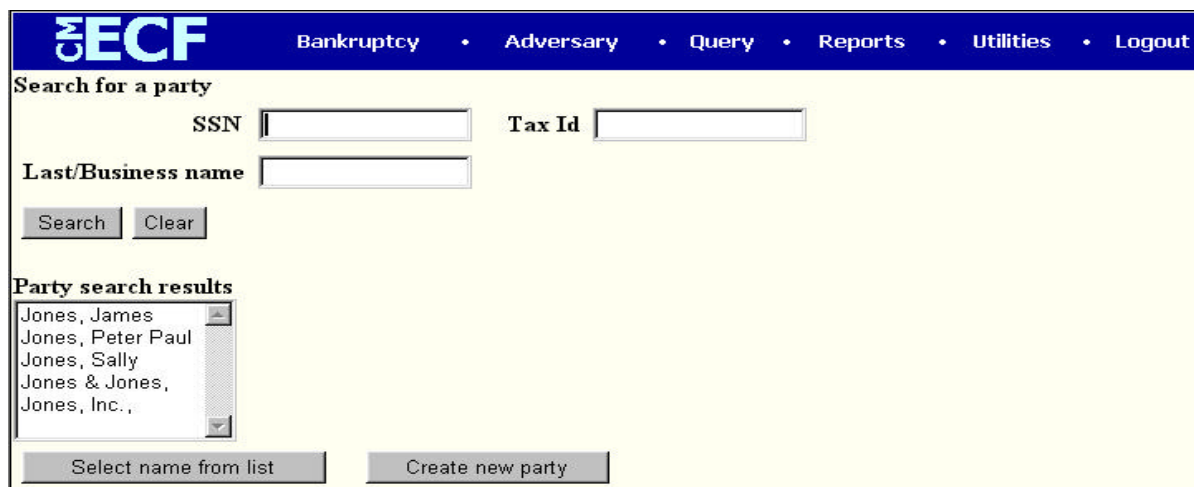


Figure 2

- ◆ If the system finds the correct party, highlight the party's name in the **Party Search Results** window, and click **Select Name from List** to add the party to the case, (See Figure 2) and then proceed to **Step 6**.

OR

- ◆ If the system does not find the party with the search criteria entered, it will display a message **No person found**. (See Figure 3)
- ◆ Click **Create New Party** to add the party to the case.

ECF Bankruptcy • Adversary • Query • Reports • Utilities

Search for a party

SSN Tax Id

Last/Business name

Party search results

No person found.

Figure 3

STEP 6 The **Party Information** screen displays. (See Figure 4)

ECF Bankruptcy • Adversary • Query • Reports • Utilities

Party Information
James Jones SSN:192-39-2983

Office Address 1

Address 2 Address 3

City State Zip

County Country

Phone Fax

E-mail

ProSe Role

Party text

Add all attorneys and aliases before clicking the Submit button.

Figure 4

Note: if you have selected a party from the party list, you will not be able to change the social security number/tax id number field; however, you will be able to modify other field information.

- ◆ Enter or verify the party name. Remove party information (if any) such as address and county. The plaintiff is represented by counsel, and thus no

address information should be entered.

Important: Specify applicable **[Role]** type, Plaintiff, Defendant, etc. The system will default to “*debtor*” and must be changed to reflect the correct party role for the party currently being added.

- ◆ Click **[Attorney]** if you are representing the party being added.
 - ◆ Enter your last name or bar id number.
 - ◆ Click **[Search]** to continue.
 - ◆ The **Attorney search results** screen displays.
 - ◆ Click to highlight the attorney name.
 - ◆ Click **[Select name from list]** to continue and add yourself as the attorney for the party.

Note: if you are representing multiple parties, you will need to add yourself as the attorney for each plaintiff-party you are representing.

- ◆ The **Party Information** screen displays again.
- ◆ Add aliases, if any, by clicking the **[Alias]** button.
- ◆ Review information by clicking the **[Review]** button to verify the information for the party being added.
- ◆ When all information is correct, click **[Submit]** to add the party to the case and database.
- ◆ The **Party Information** screen displays again.

REPEAT Steps 4, 5 and 6 until all Plaintiff(s), Defendant(s) or other interested parties have been added to the system. Note: When adding a defendant, DO NOT associate an attorney for the defendant. An attorney for a defendant will be added to the case upon the filing of an answer. If the defendant is a debtor, be sure to also remove the debtor address information in the same manner as was done for the plaintiff.

- ◆ Once all parties have been added to the system, click **[End Party Selection]**.

STEP 7 The **Adversary Statistical Data** screen displays. (See Figure 5)

CM/ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout

Open Adversary/MP Case

Party code

Nature of suit

Origin

Transfer date

Rule 23 (class action)

Jury demand

Demand (\$000)

Figure 5

- ◆ Click the down arrow ▼ to reveal the list of **Party Code** options. If the U.S. is a plaintiff or a defendant in this adversary proceeding, click to highlight the correct party code to so indicate. If the U.S. is ***not*** a plaintiff or defendant in your case, accept the default **US is not a party to the case**.
- ◆ Click the down arrow ▼ to reveal the list of **Nature of Suit** options. Click to highlight the nature of suit that applies to the instant case. Only one **Nature of Suit** option can be selected. However, there will be a supplemental text box window in the **Final Docket Text** screen in which to type the **Nature of Suit(s)** the pertain to this filing.

Important Note: If there is more than one **Nature of Suit** and one is objection to discharge (727), choose *424(obj/Revocation Discharge 727)* here. This will place a flag on the base case to note that an objection to discharge exists in the case.

426 (Dischargeability 523) ▼

424 (Obj/Revocation Discharge 727)

426 (Dischargeability 523)

434 (Injunctive Relief)

435 (Validity/Priority/Extent Lien)

454 (Recover Money/Property)

455 (Revoke Plan Confirmation)

456 (Declaratory Judgment)

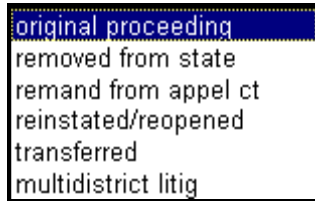
457 (Subordinate Claim/Interest)

458 (Approval For Sale)

459 (Application For Removal)

498 (Other Action)

- ◆ Click the down arrow ▼ to reveal the list of **Origin** options. Click to highlight and select the appropriate origin for the case being filed. The **Origin** field defaults to original proceeding. Other values are:



- ◆ Enter a **Transfer Date** if applicable.
- ◆ Click the down arrow ▼ to reveal the list of **Rule 23 (Class Action)** options. The default is **n** for no. If the adversary being filed is a Rule 23 (Class Action) proceeding, change the default to **y**.
- ◆ Click the down arrow ▼ to reveal the list of **Jury Demand** options. Those options are *Both*, *Defendant*, *None* or *Plaintiff*. The system defaults to none. If you are requesting a jury trial in your attached complaint, so indicate in this field.
- ◆ **Demand:** If there is a dollar demand in the complaint, enter the **(\$000)** amount to the nearest thousand (i.e. for a demand of 5,000 enter 5, leave off the 000). Note: DO NOT use dollar signs or commas.
- ◆ Click **[Next]** to continue.

STEP 8 The **Related Cases** screen displays. (See Figure 8)

A screenshot of the 'Related Cases' screen. It features a text input field for 'Lead case number' and a dropdown menu for 'Association type'. The 'Association type' dropdown is currently set to 'Adversary'. Below these fields are two buttons: 'Next' and 'Clear'.

Figure 8

- ◆ Enter the **Lead Bankruptcy Case Number** (Base Case Number) in yy-nnnnn format.
- ◆ The **Association Type** field defaults to adversary. Click the down arrow ▼ to reveal the list of other **Association Type** options:

Adversary, Objection to Discharge of Debt
Adversary, Objection to Discharge of Debtor
Adversary

Consolidated
Deconsolidated
Jointly Administered
Related

- ◆ Click to highlight and select the appropriate **Association Type**.

Important Note: If there is more than one **Nature of Suit** and one is objection to discharge (727), choose *Adversary, Objection to Discharge of Debtor* here. This will place a flag on the base case to note that an objection to discharge exists in the case.

- ◆ Click **[Next]** to continue.

Note: If the system prompts that the base case number entered is not a valid case, click the **[Back]** button and re-enter the case number.

STEP 9 The **PDF Document Selection** screen displays.

- ◆ Click **[Browse]**, then navigate to the directory where the appropriate PDF file is located. Double-click the PDF file to select it and associate it with this docket entry. Be sure to include the pdf image of the adversary proceeding cover sheet.

Note: If you wish to view the image before selecting to be sure you have chosen the correct file, before double-clicking, first right click on the highlighted filename and click on **open**. You can view the image in Adobe Acrobat, then close Adobe Acrobat when you have finished viewing the image.

- ◆ The **Attachments to Document** option defaults to **No**. If you have attachments to this document, click the **Yes** radio button to indicate there are attachments. (Refer to module: *Attachments to Documents* for more information).

Note: When an adversary is filed electronically, the court issues an electronic summons. Therefore, it is not necessary to include with the filing an image of an unissued summons or to make a docket entry to send an unissued summons. The summons will be available in several days from the docket report and the Bankruptcy Noticing Center will also send a copy of the summons to the attorney.

- ◆ Click **[Next]** to continue.

STEP 10 The **Fee Information/Nature of Suit** screen displays. (See Figure 9)

Figure 9

- ◆ In the **Receipt Field**, type CC for credit card. If the trustee is deferring the fee, type DEF in the receipt field. If the fee is not applicable (*i.e.* the debtor and the plaintiff are the same party and the base case is a Chapter 7 filing), type NA in the receipt field.

Note: If the Trustee is deferring the fee, after opening the adversary case, click the Adversary hypertext link. Click the Summons/Complaint hypertext link. Docket the event: Affidavit of Trustee-Plaintiff of Deferred Filing Fee.
- ◆ A system message appears: “**Enter Nature of Suit and Description in Docket Text**” to remind you to add these items to the **Final Docket Text** window which will appear on the next screen.

STEP 11 The **Final Docket Text** screen displays. (See Figure 10)

Figure 10

- ◆ A supplemental text box window and a prefix box are available to add more detail to the docket text.

- Click the down arrow ▼ to display the prefix options.
Options to choose from are:

[none]
Agreed
Alias
Amended
Emergency
Ex Parte
Scheduled with urgency
Fifth
Final
First
Fourth
Interim
Intervenors
Joint
Omnibus
Opposition
Proposed
Sealed
Second
Sixth
Supplemental
Supporting
Third
Third Party

- A supplemental text box window is provided in which to type the nature of the suit(s).
- Verify the accuracy of the Final Docket Text.
- Click **[Next]** to continue.

STEP 12 The **Final Approval** screen displays.

- ◆ Verify the Final Docket Text. Read the warning message.
- ◆ If the Final Docket Text is correct:
 - ◆ Click **[Next]** to continue and officially submit document.
- ◆ If the Final Docket Text is incorrect:
 - ◆ Click the browser **[Back]** button to find the error(s) and proceed with the event.
 - ◆ To abort or restart the transaction, return to **Step 1** and begin again.

STEP 13 The **Notice of Electronic Filing** screen displays.

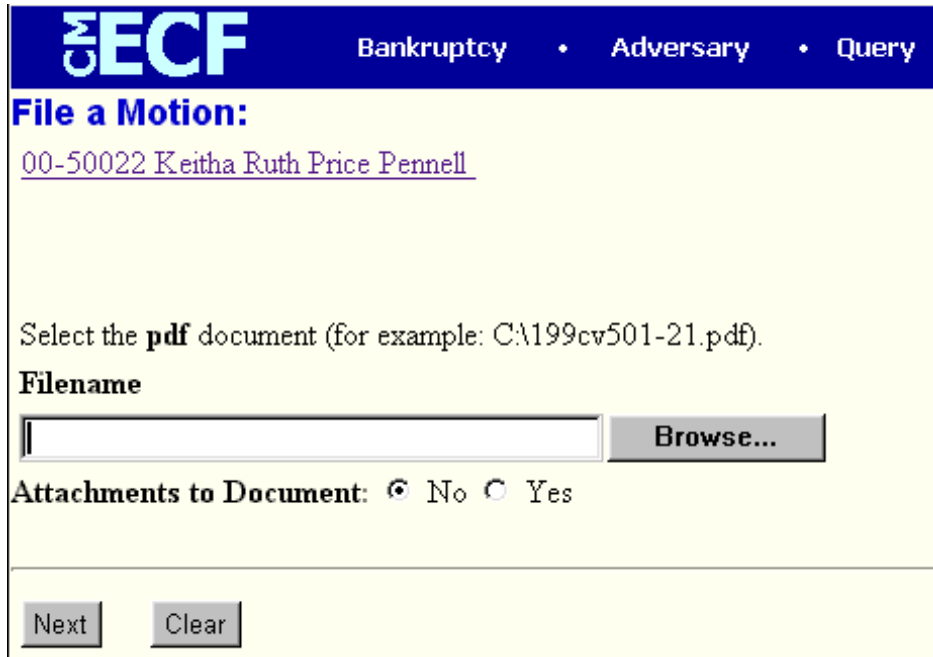
- ◆ The Notice of Electronic Filing is the verification that the filing has been filed electronically in the court's database. It certifies the that document is now an official court document.
- ◆ Clicking on the case number hypertext link on the **Notice of Electronic Filing** will present the *Docket Report* for this case.
- ◆ Clicking on the document number hypertext link will present the *PDF Image* of the document just filed.
- ◆ To print a copy of this notice click the browser **[Print]** icon.
- ◆ To save a copy of this notice, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ You may also save the notice through the browser **File/Save** option.

Attachments to Documents

This module demonstrates the steps to take when an electronically filed document has attachments. This would occur most frequently when a document (such as a motion, for example) was typed in word processing and converted to PDF format, but there were additional exhibits to be included with the filing. In that instance, there would be more than one *PDF* file; the document itself converted to PDF format in the word processor, and one or more attachments scanned and saved in *PDF* format separate from the main document.

Attachments to Documents

- STEP 1** Scan the attachment(s) and convert to *PDF* format. (See module: Converting Scanned Documents to PDF Format Using Adobe Acrobat Software for additional information.) If you have multiple exhibits to attach to a document, you can scan them all at the same time and save them under one *PDF* filename.
- STEP 2** During the docketing process, the **PDF Document Selection** screen displays. (See Figure 1)



The screenshot shows the ECF (Electronic Case Filing) interface. At the top, there is a blue header with the ECF logo and navigation links: Bankruptcy, Adversary, and Query. Below the header, the page title is "File a Motion:" followed by the case number "00-50022 Keitha Ruth Price Pennell". The main content area has a yellow background. It contains the instruction "Select the pdf document (for example: C:\199cv501-21.pdf)." and a label "Filename". Below the label is a text input field and a "Browse..." button. Underneath the input field, there is a label "Attachments to Document:" followed by two radio buttons: "No" (which is selected) and "Yes". At the bottom of the form, there are two buttons: "Next" and "Clear".

Figure 1

- ◆ Click **[Browse]**, then navigate to the directory where the appropriate PDF file is located for the main document. Double-click the PDF file to select it and

associate it with the docket entry.

Note: If you wish to view the image before associating it with the docket entry to verify that you have chosen the correct file, first right click on the highlighted filename and select **Open** to view the image in Adobe Acrobat.

- ◆ The **Attachments to Document** radio button defaults to **No**. Click to select **Yes**.
- ◆ Click **[Next]** to continue.

STEP 3 The **Attachments to Document** screen displays. (See Figure 2)

- ◆ In **Section 1**, click **[Browse]**, then navigate to the directory where the **attachment** PDF file is located for the main document. Double-click the PDF **attachment** file to select it and include it with the main document for this docket entry.

Select one or more attachments.

1) Enter the pdf document that contains attachment (for example: C:\app\main.doc.pdf)

Filename

Browse...

2) At your option, select a document type and/or enter a description

Type Description

3) Add the filename to the list box below. If you have more attachments, go back to Step 1. When the list of filenames is complete, click on the Next button.

Add to List

Remove from List

Next

Figure 2

STEP 4 The **attachment PDF** filename now displays in **Section 1**. (See Figure 3)

The screenshot shows the ECF (Electronic Case Filing) system interface. At the top, there is a blue header bar with the ECF logo and navigation links: Bankruptcy, Adversary, Query, and Reports. Below the header, a yellow box contains the instruction "Select one or more attachments." followed by step 1: "1) Enter the pdf document that contains attachment (for example: C:\appendix.pdf)." Below this, there is a form with a label "Filename" and a text input field containing "X:\PDF files\ntc117.pdf". To the right of the input field is a "Browse..." button.

Figure 3

- ◆ **Section 2)** allows for descriptive information about this **attachment**.
- ◆ Click on the down arrow ▼ to reveal the list of options in the **Type** category. (See Figure 4)

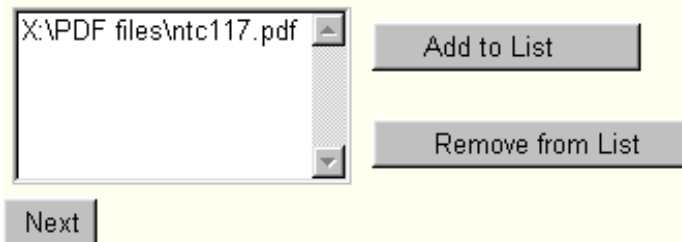
The screenshot shows the ECF system interface for Section 2. It contains the instruction "2) At your option, select a document type and/or enter a description." Below this, there is a form with two columns: "Type" and "Description". The "Type" column has a dropdown menu with a list of options: Appendix, List of 20 Largest Creditors, Exhibit, Index, Affidavit, Revision, Schedule, Supplement, Volume(s), and Proposed Order. The "Description" column has a text input field. To the right of the input field, there is a button labeled "Add to list".

Figure 4

- ◆ Click to highlight a **Type** if appropriate for this **attachment**, or leave blank.
- ◆ Click inside the Description field to type the name of the **attachment(s)**. As examples: *Deed of Trust and Promissory Note*; or *Security Agreement* (if only one attachment is included).
- ◆ Click **[Add to list]** to include the **attachment** in the docket entry.

STEP 5 The **Attachment Filename** displays in **Section 3)**. (See Figure 5)

3) Add the filename to the list box below. If you have more attachments, go complete, click on the Next button.



The screenshot shows a software window with a list box on the left containing the text 'X:\PDF files\ntc117.pdf'. To the right of the list box are two buttons: 'Add to List' and 'Remove from List'. Below the list box is a 'Next' button.

Figure 5

- ◆ If the **attachment** filename displayed is incorrect, click to highlight the filename, then click **Remove from List**.
- ◆ If there are additional attachments to include, repeat **Steps 3 and 4** until all attachments are displayed in **Section 3**.
- ◆ When all attachments are displayed in **Section 3**, click **[Next]** to continue.
- ◆ Proceed to docket the remainder of the event as usual.

Monthly Calendar Report

There are three basic calendars available in the CM-ECF system: The **Monthly Calendar** which provides a snapshot of the Court's entire monthly activity; the **Daily Calendar**, which provides a standardized schedule by day; and **Calendar Events**, which is a variation of the Daily Calendar with more extensive options. (See also Modules: *Daily Calendar* and *Calendar Events*.) This module will demonstrate the steps to follow to print a Monthly Calendar Report.

STEP 1 Click the [Reports](#) hypertext link on the CM/ECF main menu.

STEP 2 The **Reports** screen displays.

◆ Click the [Calendar - Monthly](#) hypertext link.

STEP 3 The **Report Selection Options** screen displays. (See Figure 1)

CM/ECF Bankruptcy • Adversary • Query • Reports • Utilities

Calendar Report

Case number

Judge
Whitley, J.

Office
Bryson City (2)

Chapter
9

Deadlines/hearings
All Hearings

☐ Include terminated deadlines/hearings

☐ Include weeken.ds

Month

Year

Figure 1

◆ Type the case number in yy-nnnnn format. Although a Monthly Report can be produced on a case-by-case basis, this is not a required field. Leaving the case number blank will produce a Monthly Report of all cases for the Judge, Office, Chapter and Deadline/hearings selected.

- ◆ The **Judge** category defaults to 'blank' which means 'all' Judges will be included in the Calendar Report. To limit the report to a specific Judge, click the down arrow ▼ to find and select the Judge. Select more than one Judge by holding down the **[Ctrl]** key and clicking on additional Judge names.
- ◆ The **Office** category defaults to 'blank' which means 'all' Offices will be included in the Calendar Report. To limit the report to a specific Office, click the down arrow ▼ to find and select the Office. Select more than one Office by holding down the **[Ctrl]** key and clicking on additional Office names.
- ◆ The **Chapter** category defaults to 'blank' which means 'all' Chapters will be included in the Calendar Report. To limit the report to a specific Chapter, click the down arrow ▼ to find and select the Chapter. Select more than one Chapter by holding down the **[Ctrl]** key and clicking on additional Chapter numbers.
- ◆ The **Deadlines/Hearings** category defaults to 'blank' which means 'all' deadlines and hearings will be included in the Calendar Report. To limit the report to specific types of Deadlines and Hearings, click the down arrow ▼ to find and select the types of Deadlines and Hearings to display on the Calendar Report. Select more than one type of Deadline/Hearing by holding down the **[Ctrl]** key and clicking on additional options.
- ◆ The option to **Include Terminated Deadlines/Hearings** is not selected. The report will not show terminated deadlines and hearings. To include them in the Calendar Report, click the radio box to place a checkmark in this option.

Note: This option is available to show past activity. If this feature is selected, all terminated or satisfied schedules will display in red and include the date satisfied or terminated.
- ◆ The option to **Include Weekends** is not selected. The report will not show weekend days. To include weekend days in the Calendar Report, click the radio box to place a checkmark in this option.
- ◆ The **Month** category defaults to January. Click the down arrow ▼ to find and select the month for the Calendar Report.
- ◆ The **Year** category defaults to 2001. Accept the default or type a different year.

Note: Press **[Clear]** to start over with the system defaults and begin selecting options again.
- ◆ When all Report Selections Options are correct, click **[Run Report]**.

STEP 4 The **Calendar Report** displays. (See Figure 2)


 Bankruptcy • Adversary • Query • Reports • Utilities • Logout				
00-12243 George Stephanopolous				
August 2000				
Monday	Tuesday	Wednesday	Thursday	Friday
	1	2	3	4
7	8	9	10	11
14	15	16 <input type="checkbox"/> - Objections Due - RE: Doc #1, Order to Show Cause	17 <input type="checkbox"/> 02:00 PM - Show Cause Hearing - RE: Doc #1; Order to Show Cause	18

Figure 2

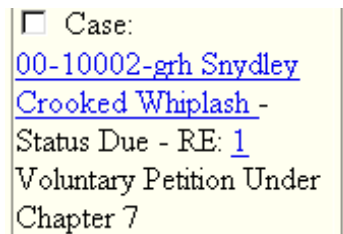
- ◆ If the Calendar Report was run for one case only, the case name and number will appear at the top left of the report in the form of a hypertext link. Clicking on the link will display the Docket Report for the case.
- ◆ A Hearing Event shows the hearing time and related issue being heard. (See Figure 3)

☐ Case:
[00-30045 Sonny's House of Pancakes](#)
 02:00 PM - Hearing -
 RE: [8](#) Motion to
 Abandon Property
 (fee)

Figure 3

- ◆ Clicking on the case name/case number hypertext link will display the Docket Report.
- ◆ Clicking the Document Number hypertext link (8, in this example) will display a copy of the PDF image for the document: Motion to Abandon Property.

- ◆ A Deadline Event shows the deadline and the event that created the deadline.
(See Figure 4)



☐ Case:
[00-10002-grh Snyder
Crooked Whiplash -](#)
Status Due - RE: 1
Voluntary Petition Under
Chapter 7

Figure 4

- ◆ Clicking on the case name/case number hypertext link will display the Docket Report.
- ◆ Clicking the Document Number hypertext link (1, in this example) will display a copy of the PDF image for the document: voluntary Petition Under Chapter 7. This is the document that created the deadline: Status Due.

Daily Calendar Report

There are three basic calendars available in the CM-ECF system: The **Monthly Calendar** which provides a snapshot of the Court's entire monthly activity; the **Daily Calendar**, which provides a standardized schedule by day; and **Calendar Events**, which is a variation of the Daily Calendar with more extensive options. (See also Modules: *Monthly Calendar* and *Calendar Events*.) This module will demonstrate the steps to follow to print a Daily Calendar Report.

- STEP 1** Click the [Reports](#) hypertext link on the CM/ECF main menu.
- STEP 2** The **Reports** screen displays.
- ◆ Click the [Calendar - Daily](#) hypertext link.
- STEP 3** The **Report Selection Options** screen displays. (See Figure 1)

Daily Calendar

Case number Judge
Date Calendar Class
Location
Sort by

Figure 1

- ◆ Type the case number in yy-nnnnn format. Although a Monthly Report can be produced on a case-by-case basis, this is not a required field. Leaving the case number blank will produce a report of all cases for the Judge, Date, Class and Location selected.
- ◆ The **Judge** category defaults to 'blank' which means 'all' Judges will be included in the Calendar Report. To limit the report to a specific Judge, click the down arrow ▼ to find and select the Judge. Select more than one Judge by holding down the **[Ctrl]** key and clicking on additional Judge names.

- ◆ The **Date** category defaults to the current date. Enter the desired calendar date.
 - ◆ The **Class** category defaults to 'blank' which means 'all' Classes will be included. The Daily Calendar Report may be limited to include only appointments, deadlines or hearings. However, if the search is limited, only one Class may be selected.
 - ◆ The **Location** category defaults to 'blank' which means 'all' Locations will be included in the report. To limit the report to a specific Location, click the down arrow ▼ to find and select the Chapter. However, if the search is limited, only one location may be selected.
 - ◆ The **Sort** field allows the report to be sorted by Judge and then Location, or Location and then by Judge.
- Note:** Press **[Clear]** to start over with the system defaults and begin selecting options again.
- ◆ When all Report Selections Options are correct, click **[Run Report]**.

U.S. Bankruptcy Court Western District of North Carolina Daily Calendar Report for 4/18/2001 Judge: Hodges, George R. 1-Main Courtroom First Floor		
09:00 AM	98-31225 Pine Tree Foods, Inc. and Posixan	Status Hearing Update Hearing Deadline
09:30 AM	00-20029 Robert J. Auger and M. Theresa Auger	Hearing RE: Doc #37; Motion for Relief from Stay (See)
	00-20069 District Memorial Hospital of Southwestern, North C	Hearing RE: Doc #147; Motion (Other)
	01-01003 R. & D. Elastics, Inc. v. Weaver et al	Hearing RE: Doc #8; Motion (Other)
		Hearing RE: Doc #8; Motion (Other)

Figure 2

STEP 4 The **Daily Calendar Report** displays. (See Figure 2)

- ◆ For each case shown on the calendar, a hypertext link appears. Clicking the link will display the docket report for the selected case.

Calendar Events Report

There are three basic CALENDARS available in the CM-ECF system: The **Monthly Calendar** which provides a snapshot of the Court's entire monthly activity; the **Daily Calendar**, which provides a standardized schedule by day; and **Calendar Events**, which is a variation of the Daily Calendar with more extensive options. (See also Modules: *Monthly Calendar* and *Daily Calendar*.) This module will demonstrate the steps to follow to print a Calendar Events Report.

STEP 1 Click the [Reports](#) hypertext link on the CM/ECF main menu.

STEP 2 The **Reports** screen displays.

◆ Click the [Calendar Events](#) hypertext link.

STEP 3 The **Report Selection Options** screen displays. (See Figure 1)

Calendar Events

Case number:

Judge: (dropdown menu)

Office: (dropdown menu)

Chapter: (dropdown menu)

Calendar events: (dropdown menu)

Date:

☐ Both ☐ AM ☐ PM

Time: ☐ AM ☐ PM

Event subset: (dropdown menu)

[Select a Previously Created Report](#)

Sort by: (dropdown menu)

Figure 1

- ◆ Type the case number in yy-nnnnn format. Although a Monthly Report can be produced on a case-by-case basis, this is not a required field. Leaving the case number blank will produce a report of all cases for the criteria selected.
- ◆ The **Judge** category defaults to 'blank' which means 'all' Judges will be included in the Calendar Report. To limit the report to a specific Judge, click the down arrow ▼ to find and select the Judge. Select more than one Judge by holding down the **[Ctrl]** key and clicking on additional Judge names.
- ◆ The **Office** category defaults to 'blank' which means 'all' Offices will be included in the Calendar Report. To limit the report to a specific Office, click

the down arrow ▼ to find and select the Office. Select more than one Office by holding down the **[Ctrl]** key and clicking on additional Office names.

- ◆ The **Chapter** category defaults to 'blank' which means 'all' Chapters will be included in the Calendar Report. To limit the report to a specific Chapter, click the down arrow ▼ to find and select the Chapter. Select more than one Chapter by holding down the **[Ctrl]** key and clicking on additional Chapter numbers.
 - ◆ The **Calendar Events** category defaults to 'All Hearings'. Other event categories may be chosen to be included in the report. Select more than one Event by holding down the **[Ctrl]** key and clicking on additional Event names.
 - ◆ The **Date** category defaults to the current date. Enter the desired calendar date. Select **Both**, **AM**, or **PM** and enter a time if desired. Leaving the time blank will result in a report containing all events, regardless of time, on the specific date chosen.
 - ◆ The **Sort** field allows the report to be sorted by Time, or by Office and Time.
- Note:** Press **[Clear]** to start over with the system defaults and begin selecting options again.
- ◆ When all Report Selections Options are correct, click **[Run Report]**.

STEP 4 The **Calendar Events Report** displays. (See Figure 2)

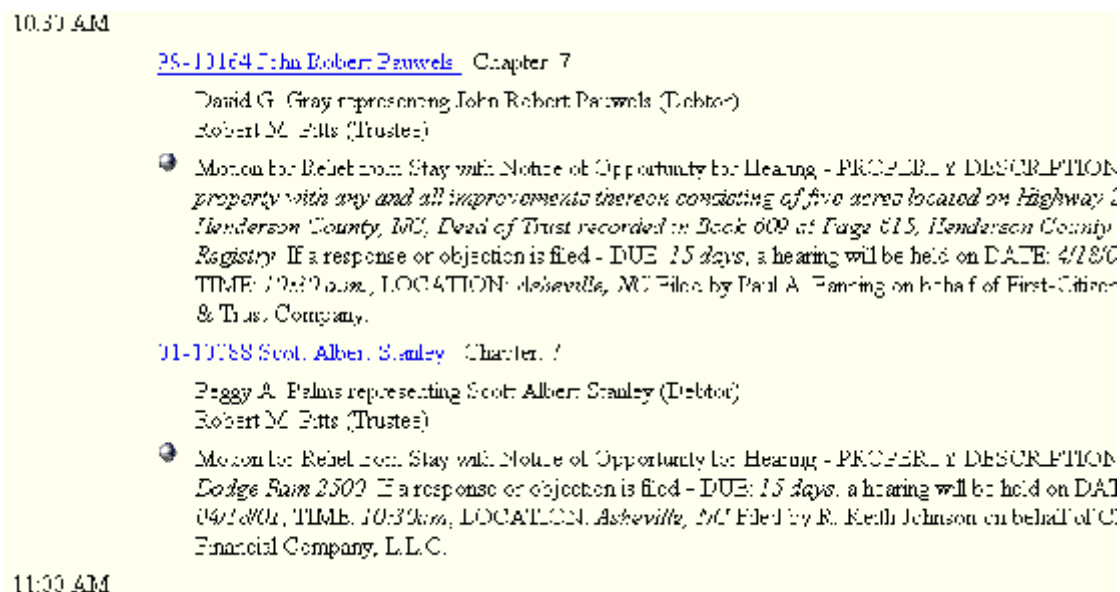


Figure 2

- ◆ For each case shown on the calendar, a hypertext link appears. Clicking the link will display the docket report for the selected case.

- ◆ Clicking on the silver ball next to each entry will display related transactions, such as responses related to the motion on for hearing. (See Figure 3) The related transactions screen will provide a document number link which will display the pdf image for each document.

Case Number: 1-10088 Scott Albert Stanley (docket entries only)		
Filing Date	#	Docket Text
03/07/2001	5	Motion for Relief from Stay with Notice of Opportunity for Hearing - PROPERTY DESCRIPTION: <i>Dodge Farm 2500</i> . If a response or objection is filed - DUE: <i>15 days</i> , a hearing will be held on DATE: <i>04/15/01</i> , TIME: <i>10:30am</i> , LOCATION: <i>Asheville, NC</i> Filed by R. Keith Johnson on behalf of Chr Financial Company, L.L.C. (smr,)
Related Proceedings:		
Filing Date	#	Docket Text
03/07/2001		Receipt of Motion RG Filing Fee Receipt Number: 00069039, Fee Amount: \$ 75 (related document(s) (smr,))
03/27/2001	7	Response/Request for Hearing (related document(s)[5]) Filed by Scott Albert Stanley. Hearing scheduled 4/18/2001 at 10:30 AM at 1-Main Courtroom First Floor (ecc,)
Calendar Text: RE: Doc #5; Motion for Relief from Stay (fee)		

Figure 3

Cases Filed Report

This module demonstrates the steps to take to obtain a Cases Filed Report in the CM/ECF system. This report can be broad of quite specific. Some of the features of this report include debtor information, file date, chapter number, case assigned judge, case assigned trustee and asset status.

STEP 1 Click the [Reports](#) hypertext link on the CM/ECF Main Menu.

STEP 2 The **Reports Menu** screen displays.

◆ Click the [Cases](#) hypertext link.

STEP 3 The **Report Selection Options** screen displays. (See Figure 1)

Cases Report

The screenshot shows the 'Cases Report' selection interface. It includes dropdown menus for Judge, Office, Case Type, Trustee, and Chapter. Below these are date range fields for Filed, Entered, Discharged, Dismissed, Closed, and Converted. There are also checkboxes for Open cases, Closed cases, and Party information. A Sort by section with three dropdowns is at the bottom, followed by Run Report. and Clear buttons.

Figure 1

- ◆ The **Judge** category defaults to 'blank' which means 'all' Judges will be included in the Cases Report. If you wish to limit the report to a specific Judge, click the down arrow ▼ to find and select the Judge. You may select more than one Judge by holding down the **[Ctrl]** key and clicking on additional Judge names.
- ◆ The **Office** category defaults to 'blank' which means 'all' Offices will be included in the Cases Report. If you wish to limit the report to a specific

Office, click the down arrow ▼ to find and select the Office. You may select more than one Office by holding down the **[Ctrl]** key and clicking on additional Judge names.

- ◆ The **Case Type** category defaults to 'blank' which means 'all' Case Types will be included in the Cases Report. If you wish to limit the report to a specific Case Type, click the down arrow ▼ to find and select the Case Type. You may select more than one Case Type by holding down the **[Ctrl]** key and clicking on additional Case Type choices.
- ◆ The **Trustee** category defaults to 'blank' which means 'all' Trustees will be included in the Cases Report. If you wish to limit the report to a specific Trustees, click the down arrow ▼ to find and select the Trustee. You may select more than one Trustee by holding down the **[Ctrl]** key and clicking on additional Trustee names.
- ◆ The **Chapter** category defaults to 'blank' which means 'all' Chapters will be included in the Cases Report. If you wish to limit the report to a specific Chapter, click the down arrow ▼ to find and select the Chapter. You may select more than one Chapter by holding down the **[Ctrl]** key and clicking on additional Chapter numbers.
- ◆ There are various ways to limit the results of the Cases Report. Although optional, these fields are:
 - ◆ **Filed**; limiting the report to cases filed during a specific period of time.
 - ◆ **Entered**; limiting the report to cases entered on the system during a specific period of time.
 - ◆ **Discharged**; limiting the report to cases discharged during a specific period of time.
 - ◆ **Dismissed**; limiting the report to cases dismissed during a specific period of time.
 - ◆ **Closed**; limiting the report to cases closed during a specific period of time.
 - ◆ **Converted**; limiting the report to cases converted during a specific period of time.
 - ◆ Any combination (or none) of these limiting report options may be chosen.
- ◆ The **Terminal Digits** field is available if you wish to limit the report to a specific terminal digit(s).

- ◆ The **Open Cases** radio box is automatically checked. If you wish to only see closed cases, un-check the Open Cases radio box and select Closed Cases.
- ◆ Click to place a checkmark in the **Party Information** radio box if you wish the report to include Party Information.
- ◆ Click to place a checkmark in the **Closed Cases** radio box if you wish the report to include Closed Cases.
- ◆ Click the down arrow ▼ to reveal the list of options in the **Sort By** field. The report may be sorted by: Filed Date, Entered Date, Case Number, Terminal Digit, Case Type, Office, Trustee and Judge. Up to three sort criteria may be chosen. The default is one sort, based upon Filed Date.
- ◆ When all selections are correct, click **[Run Report]** to continue.

Note: To return to the original defaults and begin again, click **[Clear]**.

STEP 4 The **Cases Report** displays. (See Figure 2)

Case No. Related Case Info	Tr	Ch	Party Info	Judge Trustee	Dates	Other Info
94-30757	bk	13	Rosemary Elaine Donaldson 1990 Saint Paul Church Road Clover, SC 29710 SSN: 231-74-7779	Hodges Tadlock	<i>Filed:</i> 06/14/1994	<i>Office:</i> Charlotte <i>Asset:</i> Yes <i>Fee:</i> Paid <i>County:</i> Yackin
94-10441	bk	13	William G. Capps P. O. Box 268 Candler, NC 28715-0268 SSN: 240-50-5286	Hodges Gray	<i>Filed:</i> 09/28/1994	<i>Office:</i> Asheville <i>Asset:</i> Yes <i>Fee:</i> Paid <i>County:</i> Buncombe

Figure 2

- ◆ In the Figure 4 example, the **Party Information** box was selected. The report shows detailed debtor information.
- ◆ To print a copy of the report, click the browser **[Print]** icon.
- ◆ To save a copy of the report, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ You may also save the notice through the browser **File/Save** option.

Docket Reports

This module demonstrates the steps to take to display or print a Docket Report for an ECF case.

STEP 1 Click the [Reports](#) hypertext link on the CM/ECF Main Menu.

STEP 2 The **Report Events** screen displays.

◆ Click the [Docket Report](#) hypertext link.

STEP 3 The **Pacer Login** screen displays. (See Figure 1)

ECF Bankruptcy • Adversary • Query • Reports • Utilities

301-6440.

An access fee of \$.07 per page, as approved by the Judicial Conference of the United States at its September 1998 session, will be assessed for access to this service. All inquiries will be charged to your PACER login that is kept on file. If you do not need filing capabilities, enter your PACER login and password. The Client code is provided to the PACER user as a means of tracking transactions by client. This code can be up to thirty two alphanumeric characters long.

Authentication

Login:

Password:

Client code:

☐ Make this my default PACER login

Figure 1

- ◆ Enter the Trustee Pacer **Login**.
- ◆ Enter the Trustee Pacer **Password**.
- ◆ Enter a **Client Code**, if any.

Note: Once logged into Pacer, you will not be asked again for the Login, Password and Client Code. Any fee-based transactions will automatically billed to the Pacer account. If you wish to change to a different Client Code, or if you wish to change from the Trustee Pacer account to the attorney Pacer account, click [Logout](#) on the CM-ECF Main Menu. Then log back into ECF. You will then be presented with a new Pacer login screen when

requesting a fee-based transaction.

- ◆ Click **[Login]** to continue.

Note: If you are requesting a *Docket Report* for a case for which you are the trustee and you use your trustee Login and Password, there will be no Pacer charge.

STEP 4 The **Docket Sheet Request** screen displays. (See Figure 2)

The screenshot shows the ECF Docket Sheet Request interface. At the top, there is a blue header with the ECF logo and navigation links for Bankruptcy, Adversary, and Query. Below the header, the title 'Docket Sheet' is displayed. The form contains several input fields: a 'Case number' text box, radio buttons for 'Entered' (which is selected) and 'Filed', and 'Documents' range text boxes. There are also checkboxes for 'Public docket', 'Include terminated parties', and 'Include links to Notice of Electronic Filing'. A 'Sort by' dropdown menu is set to 'Oldest date first'. At the bottom of the form are two buttons: 'Run Report' and 'Clear'.

Figure 2

- ◆ Enter the case number in yy-nnnnn format.
- ◆ The radio button for the option **Entered** is the default. Leaving this as the default, the Docket Report will be displayed showing the dates documents were *entered* on the docket. Changing the default from **Entered** to **Filed**, will result in seeing a Docket Report that will be displayed showing the dates documents were *filed*. **Filed** is recommended.
- ◆ If you want to limit your search to a range of documents, you may do so by entering the document number range in the **Documents** ____ to ____ field.
- ◆ The report defaults to **Public Docket**. This is the recommended default.
- ◆ The report defaults to **Include terminated parties**. This is the recommended default.
- ◆ If you wish to be able to view the *Notices of Electronic Filing* pertaining to docket entries, click to place a checkmark in the box for the option: Include links to Notice of Electronic Filing.

- ◆ Click the down arrow ▼ to reveal the list of **Sort by** options. The system defaults to *Oldest Date First*. The other options is:
 - ◆ *Most Recent Date First*. Select this option if you wish the docket entries to be presented from newest to oldest.

Note: To return to the system default for all options, click **[Clear]**.

- ◆ When you have selected all options, click the **[Run the Report]** to continue.

STEP 5 The **Docket Report** displays.

- ◆ Click the down arrow ▼ to scroll through the entire Docket Report.
- ◆ Clicking on a document number hypertext link will provide the *PDF* image of the filed document (**See Figure 3**). In the example below, clicking on the hypertext link [2](#) would open the image for the Chapter 13 Plan.
- ◆ Clicking on a related document number (**see again, Figure 3**) will provide the *PDF* image for the document to which this docket entry is related (linked). In the example below, clicking on the hypertext link [1](#) would open the image for Related Document #1 (the Voluntary Petition), as the Chapter 13 Plan docket entry is related to (linked) to the Voluntary Petition.

05/25/1999	2	Chapter 13 Plan (related document(s) 1) (Cummings, Sandra) (Entered: 11/01/2000)
------------	-------------------	---

Figure 3

- ◆ To print the Docket Report, click the browser **[Print]** icon.
- ◆ To save a copy of the Docket Report, click **[File]** on the browser menu bar and select **Save Frame As**.
- ◆ You may also save the Docket Report through the browser **File/Save** option.
- ◆ If the option to view Notices of Electronic Filing was selected on the Docket Sheet Request screen, a silver ball will be located to the left of the document number hypertext link. (**See Figure 4**)


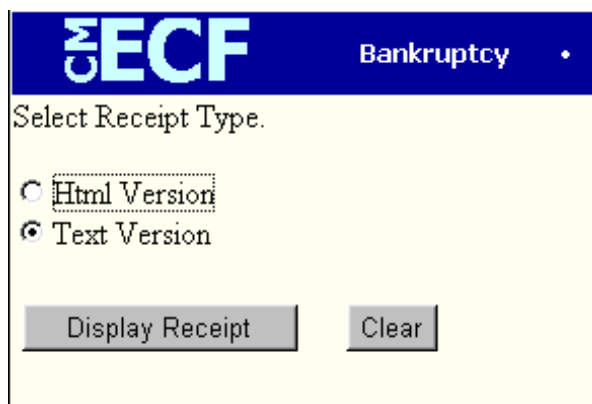
05/25/1999	 2	Chapter 13 Plan. (related document(s) 1) (Cummings, Sandra) (Entered: 11/01/2000)
------------	---	--

Figure 4

- ◆ Click the silver ball to view the **Notice of Electronic Filing**.
- ◆ The **Version Type** screen displays. (**See Figure 5**)



ECF Bankruptcy

Select Receipt Type.

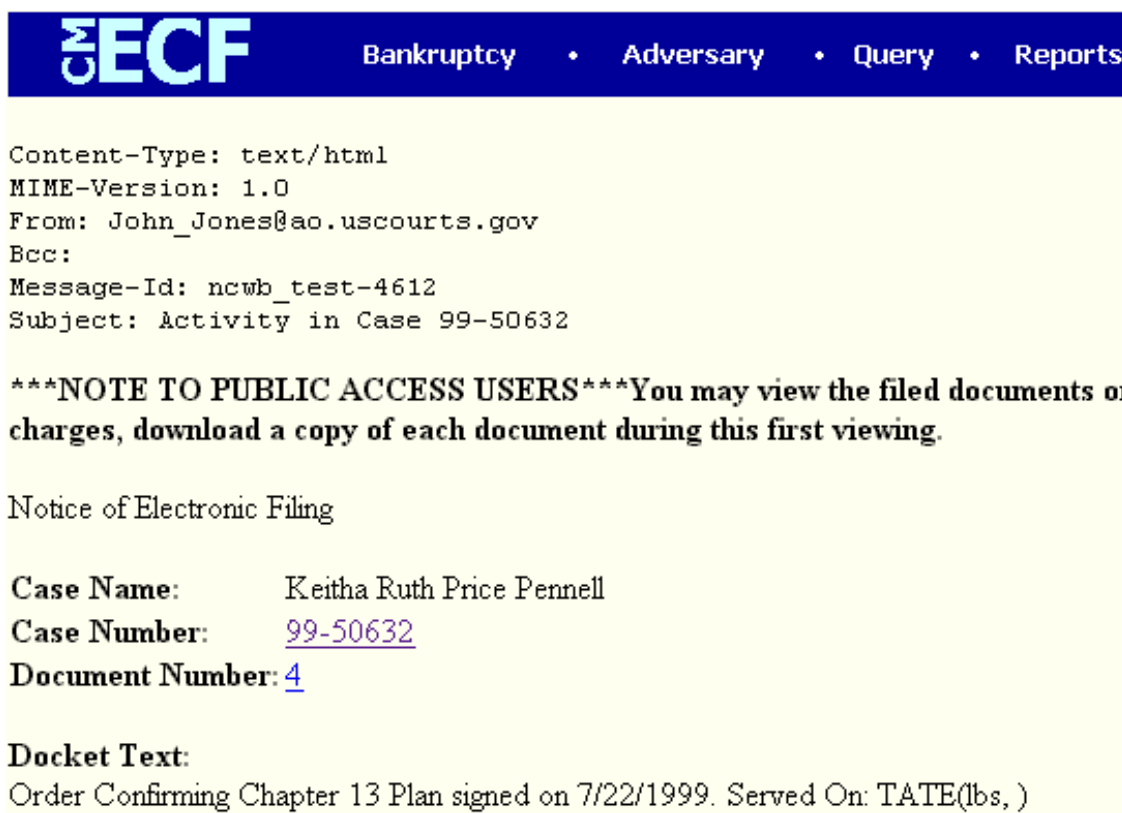
☐ Html Version

☒ Text Version

Display Receipt Clear

Figure 5

- ◆ Select to view the Notice of Electronic Filing in either Html Version or Text Version.
- ◆ Click **[Display Receipt]** to continue.
- ◆ The Html version (**See Figure 6**) will contain hypertext links to the docket report and to the document PDF image. The Text Version (**See Figure 7**) contains no hypertext links.



ECF Bankruptcy • Adversary • Query • Reports

Content-Type: text/html
MIME-Version: 1.0
From: John_Jones@ao.uscourts.gov
Bcc:
Message-Id: ncwb_test-4612
Subject: Activity in Case 99-50632

*****NOTE TO PUBLIC ACCESS USERS***You may view the filed documents on charges, download a copy of each document during this first viewing.**

Notice of Electronic Filing

Case Name: Keitha Ruth Price Pennell
Case Number: [99-50632](#)
Document Number: [4](#)

Docket Text:
Order Confirming Chapter 13 Plan signed on 7/22/1999. Served On: TATE(lbs,)

Figure 6-HTML Version

Content-Type: text/plain
MIME-Version: 1.0
From: John_Jones@ao.uscourts.gov
Message-Id: ncwb_test-4611
Bcc:
Subject: Activity in Case 99-50632

NOTE TO PUBLIC ACCESS USERS You may view the filed documents once without char

Notice of Electronic Filing

Case Name: Keitha Ruth Price Pennell
Case Number: 99-50632 <https://ecf.ncwb-test.uscourts.gov/cgi-bin/DktRpt.pl?167>
Document Number: 4
Copy the URL address on the line below into the location bar of your Web browser to

Docket Text:
Order Confirming Chapter 13 Plan signed on 7/22/1999. Served On: TATE(lbs,)

Figure 7-Text Only Version

E-Mail Notification

This module demonstrates the functions of the CM-ECF E-Mail Notification System. It will provide step-by-step instructions for establishing and editing e-mail notification information.

STEP 1 Click on the [Utilities](#) hypertext link on the CM/ECF Main Menu.

STEP 2 The **Utility Options** screen displays.

- ◆ Click the [Maintain Your ECF Account](#) hypertext link.

STEP 3 The **User Account** screen displays.

- ◆ Name, address and other user account information appears and may be edited as necessary.
- ◆ Click **[Email Information]**.

STEP 4 The **Email Information** screen displays. (See Figure 1A)

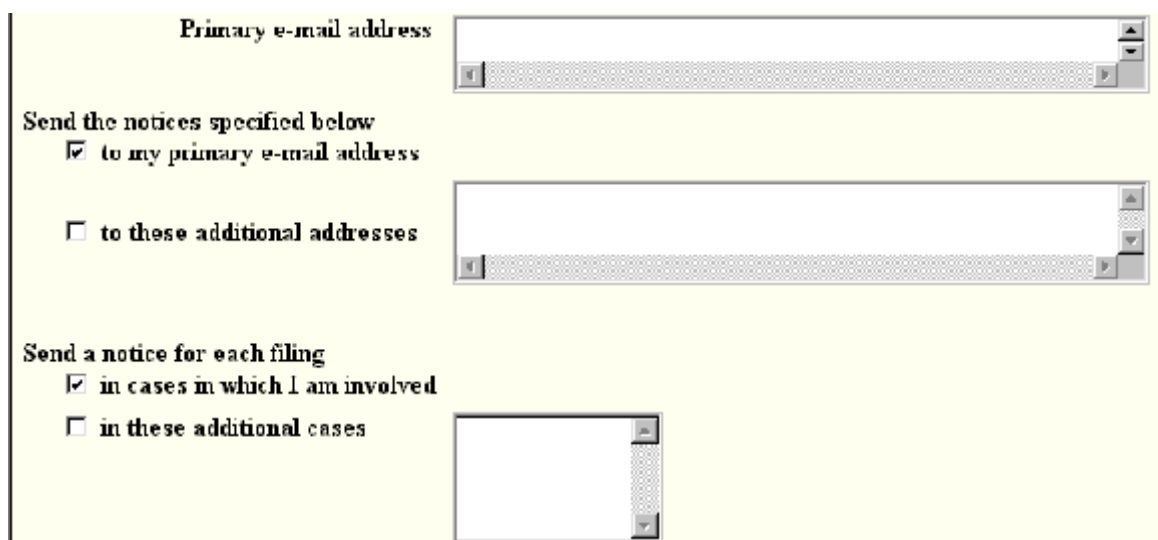


Figure 1A

- ◆ **Primary e-mail address** will have your current system e-mail address. Edit if necessary.
- ◆ **Send the notices specified below** field allows the entry of additional e-mail addresses to which notices will be sent.
- ◆ Click in the radio box to select to send notices to the primary e-mail

address.

- ◆ Click in the radio box to select to also send notices to the listed additional e-mail addresses. Add additional e-mail addresses (or delete addresses no longer needed).
- ◆ The default for email notification is to send email notification of filings in all cases in which the attorney is involved. If there are other cases in which the attorney is not involved but notices are desired:
- ◆ Type the case numbers in yy-nnnnn format (or delete case numbers for which notification is no longer desired).

☐ **Send a Daily Summary Report in my cases and the other cases listed above**

Format notices

☒ **html format for Netscape or ISP e-mail service**

☐ **text format for cc:Mail, GroupWise, other e-mail service**

Figure 1B

- ◆ **Figure 1B** shows the option for choosing to have notices sent in the form of a **Daily Summary Report**. A Daily Summary Report shows a listing of all cases for which filings occurred during the day. Select this option if desired. If not selected, individual filing notices will be sent by the system.
- ◆ **Format notices** - choose to receive notices in either html or text format. The option is html format.
- ◆ If changes have been made, be sure to click **[Return to Account screen]**
- ◆ At the Account Screen, click **[Submit]** to be sure changes have been saved.

Note: Selecting **[More User Information]** at the account screen allows you to change your own user login and password. If these are changed, you must notify the Court with the new information. It is also HIGHLY encouraged that the screen be printed showing the new login and password and kept in a safe place for future reference.

Query

This module demonstrates the functions of the CM/ECF Query feature. This feature allows access to case information, document images, attorney information, deadline and hearing information, pending motions, and much more.

STEP 1 Click on the [Query](#) hypertext link on the CM/ECF Main Menu.

STEP 2 The **Query Search** screen displays. (See Figure 1)

- ◆ Query searches can be based upon various pieces of information. The options are:
 - ◆ Case Number
 - ◆ Last Name
 - ◆ First Name
 - ◆ Middle Name
 - ◆ SSN
 - ◆ Tax ID
 - ◆ Type (Attorney, Bankruptcy Administrator, Party, Professional, Trustee, U.S. Trustee)

The screenshot shows the CM/ECF Query Search interface. At the top, a blue navigation bar contains the text 'Bankruptcy • Adversary • Query • Reports • Utilities'. Below this, the word 'Query' is displayed in a large, bold, blue font. The main content area is titled 'Search Clues' and contains several input fields for searching. The 'Case Number' field is pre-filled with '1 00 b1c 10013' and has an example '(Example: 99-80013)' to its right. The 'Last Name' field is empty with an example '(Examples: Desoto, Des*t)' to its right. The 'First Name' and 'Middle Name' fields are empty. The 'SSN' and 'Tax ID' fields are empty. The 'Type' field is a dropdown menu. At the bottom of the search area are two buttons: 'Run Query' and 'Clear'.

Figure 1

- ◆ Enter the information upon which the Query Search should be based.

- ◆ Click **[Run Query]** to continue.

Note: To return to the original blank defaults and begin the search again, click **[Clear]**.

STEP 3 The **Query Results** screen displays. **(See Figure 2A)**

There were 13 matching persons.	
Smith, Alice	(pty)
Smith, James	(pty)
Smith, Joanne	(pty)
Smith, John D.	(pty)
Smith, John Doe	(pty)
Smith, Robert Charles(Jr.)	(pty)
Smith, Sarah M.	(pty)
Smith Home Repair	(pty)
Smith Wholesale Co.	(cr)
Smith Wholesale Co.	(cr)

Figure 2A

- ◆ If the Query Search found more than one case that matched the search criteria, a list of matches will be presented. Click on the hypertext link for the desired match. The desired case will be presented **(See Figure 2B)**.

- ◆ If the Query Search found only one match, the specific case will be presented. (See Figure 3B)

The screenshot shows the CM/ECF interface. At the top is a blue navigation bar with the CM/ECF logo and links for Bankruptcy, Adversary, Query, Reports, and Utilities. Below this, the case information is displayed: Case number 00-10013, Name Simon Van Dross, Case type bk, Chapter 13, Asset Yes, Vol v, Date filed 10/25/2000, and Date of last filing 11/07/2000. The word 'Query' is prominently displayed in blue. Below the query title is a list of hyperlinks organized in two columns. The left column includes Aliases, Associated Cases, Attorneys, Calendar - Monthly ..., Case Summary, Creditors ..., Deadlines/Hearings ..., Docket Report ..., and Filers The right column includes History/Documents ..., Judge, Motions Report ..., Notice of Bankruptcy Case Filing, Parties, Related Transactions ..., Status, and Trustee.

Figure 2B

- ◆ Basic case information is listed at the top of the Query Results screen. This includes the case name, case number, asset status, voluntary or involuntary status, the case file date, the chapter number, and the date of the last docket entry. Additional options are:
 - ◆ **Aliases** - showing any aliases listed for the case.
 - ◆ **Associated Cases** - showing any associated cases, such as adversary proceedings or jointly administered cases.
 - ◆ **Attorneys** - showing names, addresses and phone numbers of the case attorneys and the party representation.
 - ◆ **Calendar-Monthly** - is a hypertext link to the Monthly Calendar Report to display the Monthly Calendar for the selected case. (See Module: *Monthly Calendar Report* for additional information).
 - ◆ **Case Summary** - provides basic case summary information including debtor social security number, file opening, closing, discharge, dismissal and conversion dates.

- ◆ **Creditors** - is a hypertext link to the Creditor Report permitting the viewing of the case creditors names and addresses.
- ◆ **Deadlines/Hearings** - is a hypertext link to the Deadlines/Hearings report providing a quick glance at all hearings and deadlines set for the case.
- ◆ **Docket Report**- is a hypertext link to the docket sheet for the case.
- ◆ **Filers** - shows the names of all parties (filers) in the case. A hypertext link is available which provides a list of documents filed by each party-filer. Within the document list:
 - ◆ Access to a document image is obtained by clicking on the document number hypertext link.
 - ◆ Access to a Notice of Electronic Filing is obtained by clicking on the silver ball next to each document. (Within the Notice of Electronic Filing there is also a hypertext link to the document image.)
- ◆ **History/Documents** is a hypertext link to the History/Documents report. This report can include all events or only events with attached documents. Displaying the docket text is optional. The report can be sorted to show either oldest documents first, or to show the more recent documents first.
- ◆ **Judge** - displays Judge information for the selected case.
- ◆ **Motion Report** - shows motions (either pending, terminated or both) for the selected case.
- ◆ **Notice of Bankruptcy Filing** - is an official electronic notice of the filing of the selected case. It may be printed at any time.
- ◆ **Parties** - shows names and addresses all parties in the selected case as well as their counsel.
- ◆ **Related Transactions** - shows docket entries related to this case.
 - ◆ Access to a document image is obtained by clicking on the document number hypertext link.
 - ◆ Access to a Notice of Electronic Filing is obtained by clicking on the silver ball next to each document. (Within the Notice of Electronic Filing there is also a hypertext link to the document image.)
- ◆ **Status** - shows pending and terminated status information for the case.

- ◆ **Trustee** - shows the name and address of the trustee assigned to the selected case.

CM/ECF EVENTS

NON- COURT USERS

BANKRUPTCY EVENTS

Answer/Response

- Reference an Existing Motion/Application
 - Amended Answer to Complaint
 - Objection/Request for Hearing
 - Response/Objection
 - Response/Request for Hearing
 - X- Other Document
- Other Answers
 - Answer to Involuntary Petition(Use When Summons Service Executed Docketed by Attorney)
 - Answer to Involuntary Petition(Use When Summons Service Executed Docketed By Court User)
 - Response/Objection

Appeal

- Addendum to Record on Appeal
- Appellant Designation
- Appellee Designation
- Cross Appeal (Fee)
- Motion for Leave to Appeal
- Notice of Appeal (Fee)
- Statement of Issues on Appeal

Batch Filings(TRUSTEES ONLY)

- 341 Held-Recommend Confirmation
- Assignment of Claim
- Motion Allowance of Claims
- Motion Dismiss Case (Ch13) w/TrHrg
- Motion Dismiss/Convert/Modify w/TrHrg (Fee)
- Motion Dismiss/Modify w/TrHrg
- Motion Modify Plan (No Protest)
- Motion Modify Plan w/TrHrg
- Motion Modify/Convert (No Protest) (Fee)
- Notice Amend Wage Deduction

Notice Intent Dismiss Case	
Notice Intent Suspend Payments	
Notice Terminate Wage Deduction	
Notice of Transfer of Claim & Opportunity to Object	Trustee's
Fee Paid(COURT ONLY)	

Claim Actions(NONE AVAILABLE)

Creditor Maintenance

Enter Individual Creditors
Upload a Creditor Matrix File

File Claims

Motions/Applications

Abandon Property (No Protest) (fee)
Abandon Property (fee) w/ HEARING
Administrative Expenses w/HEARING
Allow Service by First-Class Mail (No Protest)
Appear Pro Hac Vice (fee)
Appoint Chapter 11 Trustee w/ HEARING
Assume/Reject (No Protest)
Assume/Reject w/ HEARING
Avoid Judgment Lien (No Protest)
Avoid Judgment Lien w/ HEARING
Avoid Lien (No Protest)
Avoid Lien w/ HEARING
Change Venue (No Protest)
Change Venue w/ HEARING
Compensation (No Protest)
Compensation w/ HEARING
Consolidate Cases w/ HEARING
Consolidate Proceedings w/ HEARING
Continue/Reschedule Hearing (Ex Parte)
Convert Case (fee) w/ HEARING
Deconsolidate/Split (fee) w/ HEARING
Deposit Funds to Registry
Dismiss Case w/ HEARING

Dismiss Party w/ HEARING
Employ Attorney w/Affidavit
Employ Professional w/Affidavit (Ex Parte)
Extend Time (Ex Parte)
Extend Time (w/Hearing)
Hardship Discharge (w/Hearing)
Incur Debt (Ch. 13)(No Protest)
Incur Debt w/ HEARING
Jointly Administer Cases w/ HEARING
Modify Plan (Ch. 13)(No Protest)
Modify Plan w/ HEARING
Moratorium (No Protest)
Moratorium w/ HEARING
Objection to Claim (No Protest)
Objection to Confirmation w/ HEARING
Objection to Exemption
Objection to Valuation of Collateral w/ HEARING
Objection to Debtor's Claim of Exemptions w/ HEARING (Ch 7 & 11)
Pay Filing Fee in Installments (Ex Parte)
Pay Unclaimed Funds (w/hearing)
Prohibit Use of Cash Collateral w/hearing
Reconsideration w/ HEARING
Relief from Co-Debtor Stay (No Protest)
Relief from Co-Debtor Stay w/ HEARING
Relief from Stay (No Protest)(fee)
Relief from Stay (fee) w/ HEARING
Reopen Case (fee) w/ HEARING
Sanctions w/ HEARING
Sell (No Protest)
Sell w/ HEARING
Shorten Notice(Ex Parte)
Substitute Counsel w/ HEARING
Transfer Case w/ HEARING
Withdraw Reference (fee)
Withdraw as Attorney w/ HEARING
X - Other Motion (No Protest)
X - Other Motion (w/Hearing)

Multi-Case Docketing(NONE AVAILABLE)

Notices

- Creditor Request for Notices
- Notice of Address Change
- Notice of Appearance(Attorney)
- Notice of Default Pursuant to Consent Order
- Notice of Hearing
- Notice of Opportunity for Hearing
- Notice of Voluntary Conversion of Case from 11 to 7
- Notice of Voluntary Conversion of Case from 13 to 7 (fee)
- Notice of Voluntary Conversion of Case from 7 to 13
- Notice of Voluntary Dismissal of Chapter 12/13 Case
- Notice of Withdrawal of Document
- Notice to Take Deposition
- Withdrawal of Claim
- Withdrawal of Objection to Claim
- X - Notice (Other)

Open A Case

Other

- Voluntary Petition Under Chapter 7 (fee)
- Voluntary Petition Under Chapter 13 (fee)
- Voluntary Petition Under Chapter 11 (fee)
- Voluntary Petition Under Chapter 12 (fee)
- Involuntary Petition Under Chapter 7 (fee)
- Involuntary Petition Under Chapter 11 (fee)
- Affidavit
- Amended Document (Other)
- Amended Schedules (Other)
- Amended Voluntary Petition
- Amendment- Adding New Names of Changing Amounts(Fee)
- Amendment to Matrix(Fee)
- Assignment of Claim(s)
- Certificate of Service
- Chapter 11 Final Report & Account
- Exhibit(s)
- Exhibit(s) List
- Findings of Fact & Conclusion of Law
- Matrix (Creditor Disk)
- Missing Schedules and Statements Filed(no fee)

Monthly Status/Operating Report (Chapter 11)
Post-Confirmation Report
Reaffirmation Agreement
Report of Substantial Consummation
Rule 1019 Report
Special Event-Deconsolidation
Special Event-Involuntary Petition Received (11)
Special Event-Involuntary Petition Received (7)
Special Event-Petition Received (11)
Special Event-Petition Received (12)
Special Event-Petition Received (13)
Special Event-Petition Received (7)
Statement of Compliance
Statement of Financial Affairs
Statement of Intent
Stipulation
Summary of Ballots
Summons Service Executed (Involuntary)
X - Other Document

Plan

Chapter 11 Disclosure Statement
Chapter 11 Plan
Chapter 12 Plan
Chapter 13 Plan

Trustee/Bankruptcy Administrator

Application for Compensation to Professional(s) Employed by Chapter 7
Trustee
BA Certification of 3011 Report
BA Certification of Final Report
BA Certification of Motion to Close Estate
BA Notice to 20 Largest Unsecured Creditors
BA/Trustee Status Report
Chapter 12/13 Final Report & Account & MOTION FOR DISCHARGE
Chapter 12/13 Final Report & Account AFTER CONVERSION
Chapter 12/13 Final Report & Account AFTER DISMISSAL OR
HARDSHIP DISCHARGE
Chapter 7 Final Report and Account, Application for Professional Fees
Checks & Statements

Declaration of Debtor Sworn
Initial Report
Interim Report
Memorandum from 341(a) Meeting CONTINUED
Memorandum from 341(a) Meeting HELD
Memorandum of Proceeding (Hearing Cnt/Resch)
Memorandum of Proceeding (Hearing Held)
Motion Dismiss Case (Ch. 13) w/CtHrg
Motion Dismiss/Convert/Modify w/CtHrg
Motion Dismiss/Modify w/CtHrg
Motion Modify Plan w/CtHrg
Motion for Discharge (Ch. 12)
Motion to Close Estate(Ex Parte)
Notice of 341 (a) Meeting of Creditors (Chapter 13)
Notice of Plan Modification
Notice of Possible Dividends & Request for Notice to Creditors
Notice of Withdrawal of Report of No Distribution
Notice to Release Vehicle
Rejection of Appointment
Report of Deposit
Report of No Distribution (Chapter 7)
Request for Fees Due Clerk of Court
Rule 3011 Report
Trustee's Objection to Confirmation and Motion to Dismiss w/HEARING

Trustee's 341 Filings

ADVERSARY EVENTS

Answers

- Motion/Application/Amended Answer to Complaint
 - Amended Answer to Complaint
 - Objection/Request for Hearing
 - Response/Objection
 - Response/Request for Hearing
 - X - Other Document
- Complaint, 3rd, cross, counter

Complaint/Summons

- Amended Complaint
- Complaint (fee)
- Complaint Received(COURT ONLY)
- Counterclaim
- Crossclaim
- Notice of Removal (fee)
- Summons (unissued)
- Summons Service Executed
- Summons Service Unexecuted
- Third Party Complaint
- X- Other Document

Motions

- Approve Settlement
- Default Judgment
- Dismiss Party w/ HEARING
- Entry of Default
- Extend Time
- Extend Time to File Answer
- Reopen Adversary
- Shorten Notice
- Summary Judgment w/ HEARING
- Withdraw Reference(fee)
- Withdraw as Attorney w/ HEARING
- Withdraw the Reference (fee)
- X - Other Motion
- X - Other Motion (w/ Hearing)

Notices

- Affidavit of Trustee-Plaintiff of Deferred Filing Fee
- Bill of Costs
- Brief
- Certificate of Service
- Dismissal After Settlement
- Notice of Appearance
- Notice of Hearing
- Notice to Take Deposition
- Progress Report
- Report

Stipulation
Voluntary Dismissal of Party
Voluntary Dismissal of Proceeding
X- Other Document

Open an Adversary Proceeding/MP Case