

**U. S. Bankruptcy Court
Eastern District of Virginia**

CM/ECF 3.2 and 3.3



Summary of New Features

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Release 3.2 Summary of New Features

CHANGES TO FILING SCREENS

- **Bookmarks**

It is now possible to create a bookmark for any menu item. This allows a user to put the most-used items on the browser's toolbar or in the bookmark menu, which can then be opened in different tabs or windows. **See Fig 1.**

To create a bookmark from a menu item:

- Place the cursor over the item you wish to create a bookmark for
- Right click the mouse
- Choose how you wish to mark it - *Open in New Tab* or *Open in New Window*

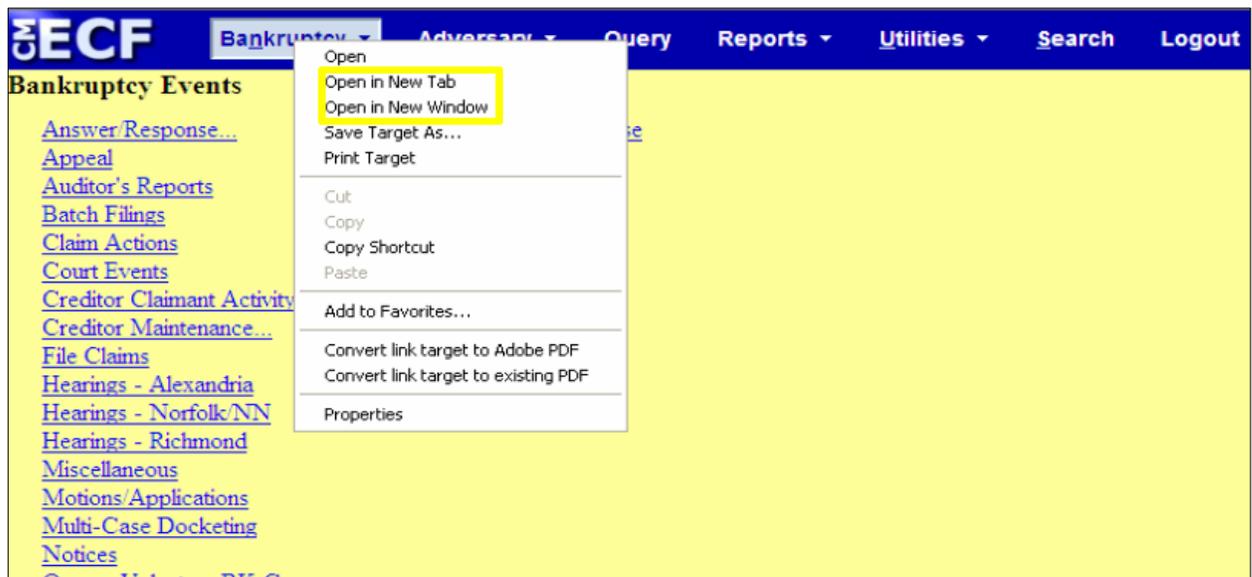


Fig 1

- **Search Menus and Events**

A new item appears on the blue menu bar called **Search**. This menu item can be used to quickly locate the correct docket event. To use the new menu and event Search, click **Search** or Alt-S keyboard command.

In the pop-up window, enter all or part of the name of the desired event. **Example**, to find a Motion for Relief from Stay event, type **Relief** in the box and press **Enter** or click the magnifying glass to begin the search. The results of your search will be displayed on the screen with the word or string of words highlighted yellow and appear under the category it resides in. **See Fig.2**



Fig. 2

To start the filing process, click on the appropriate event. The next screen will prompt you to enter the case number. Enter **Case Number**. click **Next**. The screen will highlight the event selected. **See Fig.3** If correct, press **Next**.

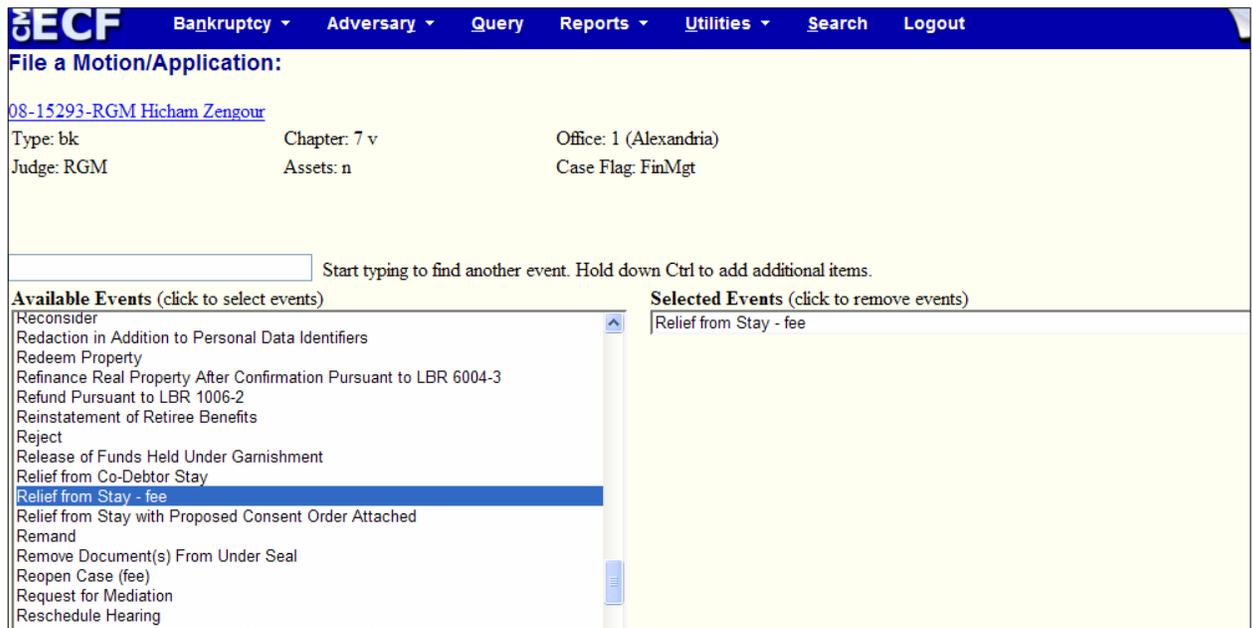


Fig. 3

NOTE: If the event selected is not correct, click to remove the event under the **Selected Events** box; then type in another event in that category above the **Available Events** box.

- **Event Searches During Docketing**

Previously in CM/ECF, selecting an event required scrolling down a long list of events in the category; this is no longer necessary. A text box is provided above the list of **Available Events**. **See Fig.4**

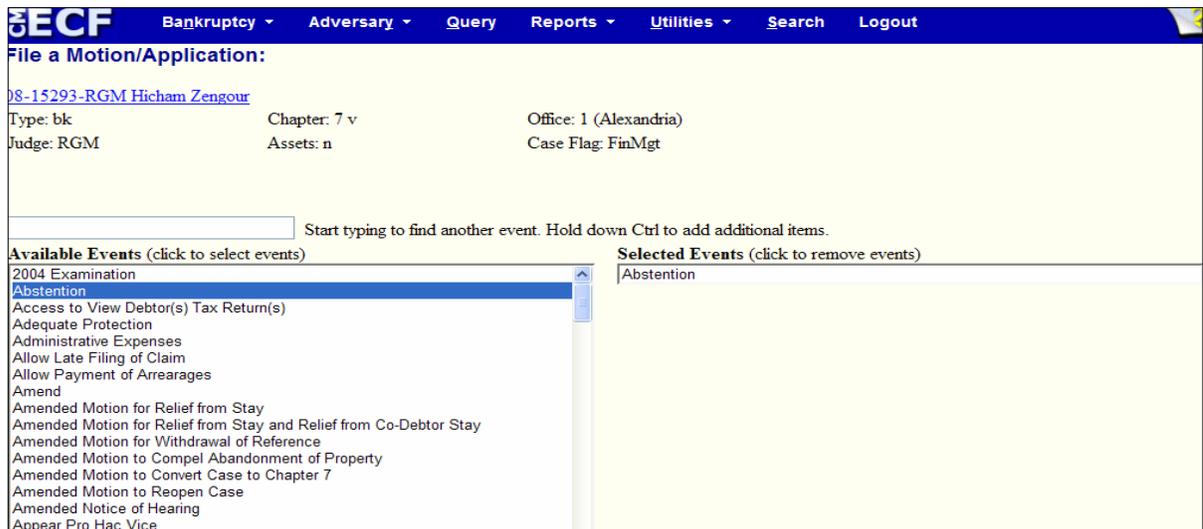


Fig. 4

Entering the name of the event or a few characters in the text box will result in the full list being replaced by a list of just those events that match: *Example "Relief"* See Fig.5

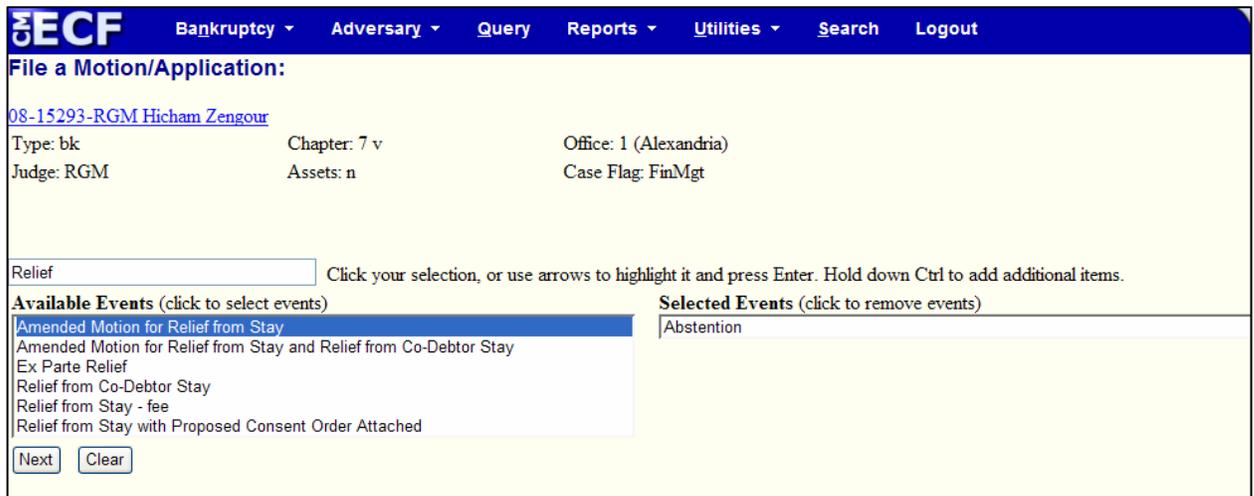


Fig. 5

- **Claim Filing Enhancement**

When filing a claim, on the **Search for Creditor** screen below, leave *Type of creditor* highlighted at the blank space, at the top of the box, so that creditors of all types can be retrieved. See Fig.6.



Fig. 6

If the creditor is on the list, a pop up box will display showing whether the selected creditor has filed a claim or not. This pop up box will also display the number of claims filed by this creditor. **See Fig.7**

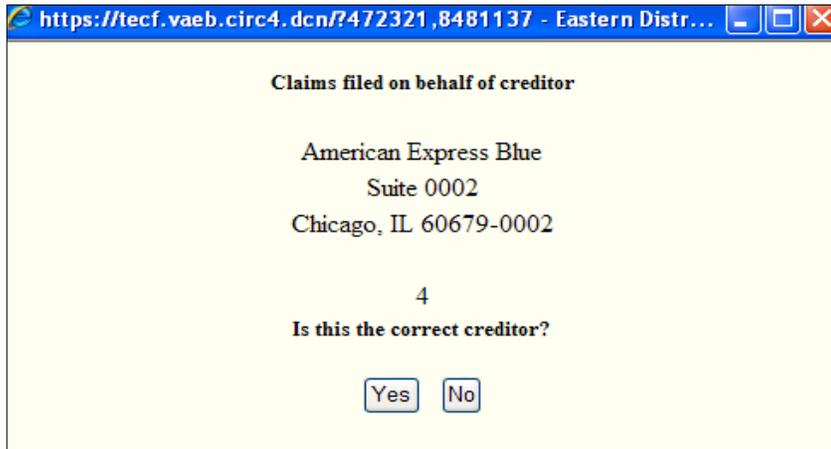


Fig. 7

If this is the correct creditor and you select **Yes**, then you will be presented with a **Claim Information** screen. **See Fig.8**

NOTE: If the creditor is not the correct one and you select **No**, you will be routed back to the **Select a Creditor for Claim** screen (Fig. 6) to re-select. If the creditor is not on the list, you will need to click on the **Add Creditor** link to add the creditor to the list.

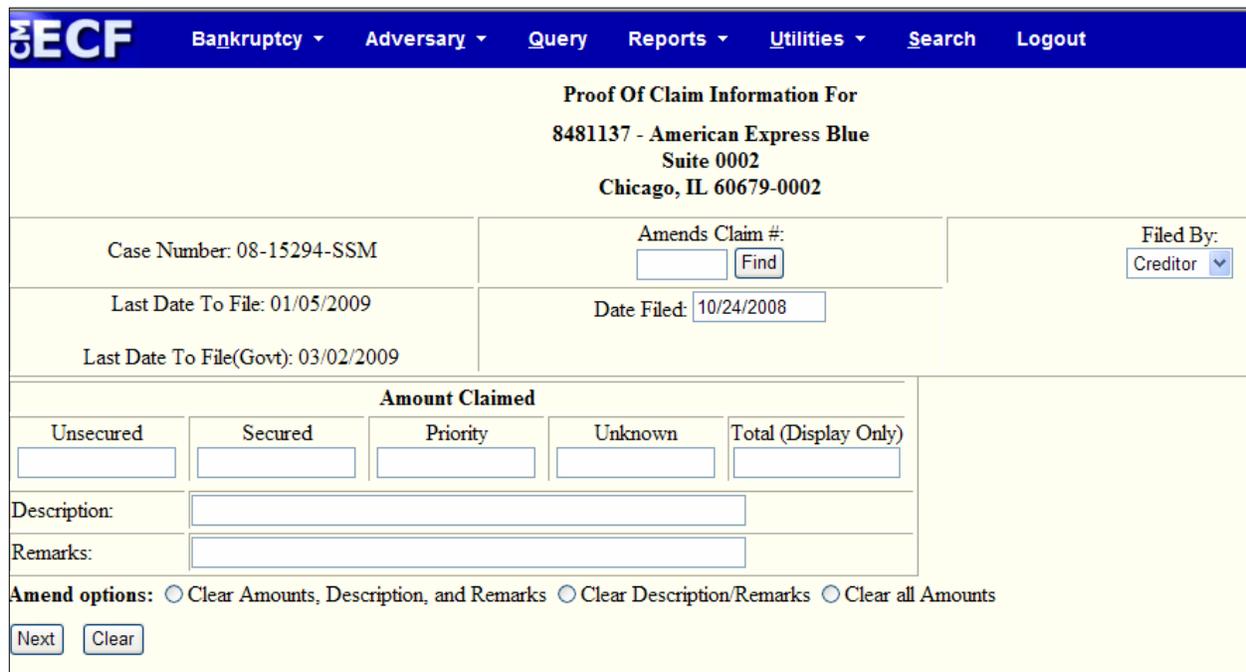


Fig 8

If you are filing an amended claim, to find the claim number of the claim you are amending, click on the **Find** button next to the *Amends Claim #* and a window will open showing all the claims filed in the case. **See Fig. 9.** They are sorted alpha by creditor name by default.

<i>Creditor Name</i> ↓	<i>Claim #</i>	<i>Date filed</i>
American Express Blue	4	10/24/2008
Commonwealth of Virginia	1	09/09/2008
HSBC Mortgage Corp.	2	09/22/2008
U.S. Dept. of Housing and Urban Development	3	09/18/2008

Fig 9

NOTE: Hovering over the name of the creditor will display the creditor's address.

To sort by claim number, click on the **Claim #** bar at the top of the screen. **See Fig. 10.**

<i>Creditor Name</i>	<i>Claim #</i> ↓	<i>Date filed</i>
Commonwealth of Virginia	1	09/09/2008
HSBC Mortgage Corp.	2	09/22/2008
U.S. Dept. of Housing and Urban Development	3	09/18/2008
American Express Blue	4	10/24/2008

Fig. 10

ENHANCED DOCKET REPORT

- **View Multiple Documents for a Single Docket Entry**
When viewing a main document with attachments, you may now combine and view them in one document. When you select a document from the docket report, and if there are attachments, a list will be displayed with "View All" and "Download All" buttons appearing at the bottom of the list. **See Fig. 11**

View All will combine all selected documents into one document and will appear on screen.
Download All will combine all the selected documents in a ZIP file.

A single PACER billing receipt page will display with multiple receipts (one per document) and a "View document" confirmation button.

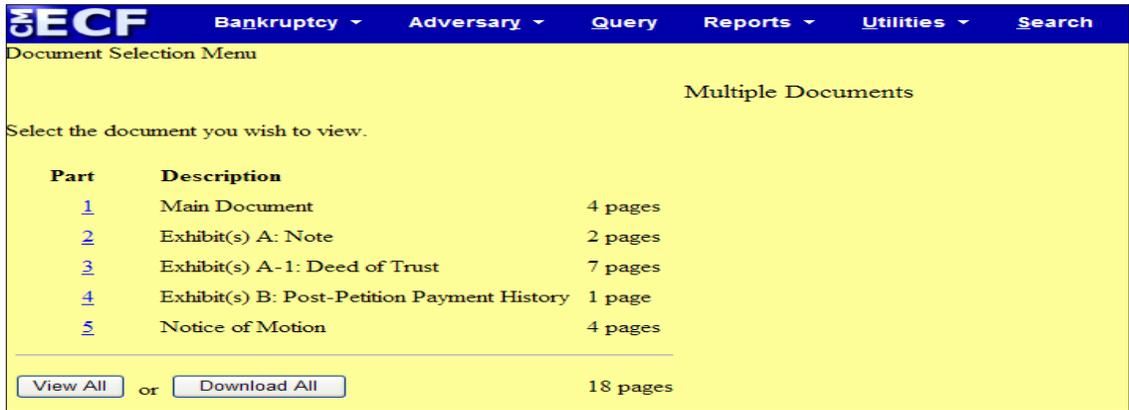


Fig. 11

- View and/or Download all Documents for Multiple Docket Entries
A new option on the Docket Report, "View multiple documents" allows multiple documents to be viewed or downloaded. **See Fig.12**

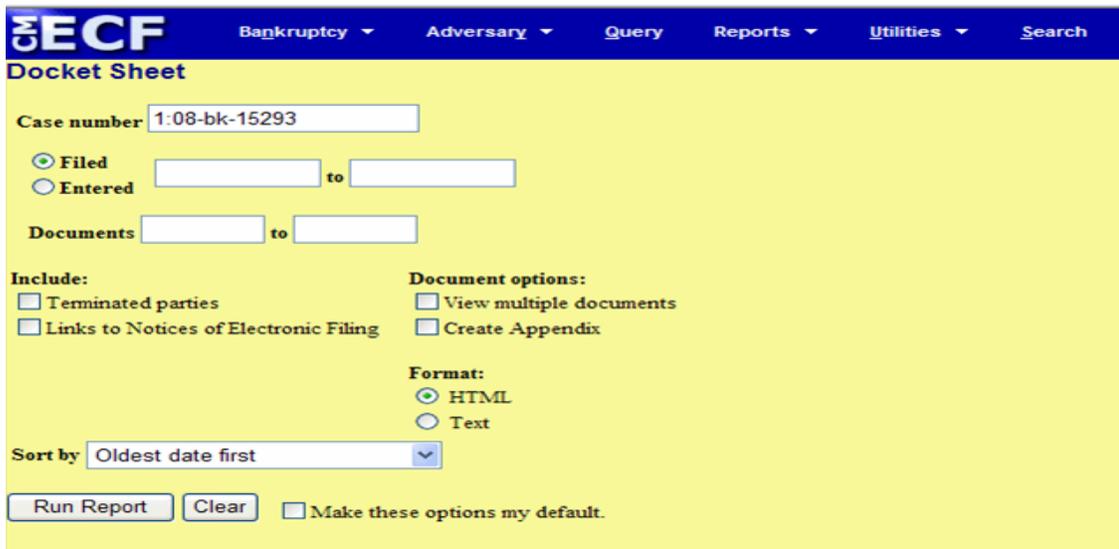


Fig.12

When the "View multiple documents" option is selected, the docket report will include a new column with check boxes. **See Fig. 13.** Select the documents you wish to view by checking in the boxes next to the docket events. Then select "View Selected" or "Download Selected."

"View All" will combine all selected documents into one document and will appear on screen. Download All will combine all the selected documents into a ZIP file.

A single PACER billing receipt page is displayed with multiple receipts (one per document and a confirm button

ECF			
Bankruptcy ▾ Adversary ▾ Query Reports ▾ Utilities ▾ Search Logout			
09/03/2008	5	<input type="checkbox"/>	Certificate of Credit Counseling (Re: related document(s) 3 Request for Notice to Cure Credit Counseling Certification Deficiency) filed by Joseph Peter Drennan on behalf of Hicham Zengour. (Drennan, Joseph)
09/03/2008	6		U.S. Treasury receipt of Voluntary Petition under Chapter 7(08-15293) [misc,1125] (299.00) filing fee. Receipt number 7136079, amount \$ 299.00. (U.S. Treasury)
09/04/2008	7	<input type="checkbox"/>	Notice of Meeting of Creditors (Re: related document(s) 2 Auto Assign Meeting of Creditors Chapter 7 Individual/Joint) (Admin.) (Entered: 09/05/2008)
09/04/2008	8	<input type="checkbox"/>	Order to Debtor(s) (Admin.) (Entered: 09/05/2008)
09/04/2008	9	<input type="checkbox"/>	Notice of Electronic Filing Procedure (Admin.) (Entered: 09/05/2008)
09/04/2008	10	<input type="checkbox"/>	Notice to Cure Credit Counseling Certification Deficiency (Re: related document(s) 3 Request for Notice to Cure Credit Counseling Certification Deficiency) (Admin.) (Entered: 09/05/2008)
09/04/2008	11	<input type="checkbox"/>	Notice of Requirement to Complete Course in Personal Financial Management and to File Certification. (Admin.) (Entered: 09/05/2008)

View Selected

or

Download Selected

Fig.13

- **Create Appendix**

A new option on the Docket Report called "Create Appendix" allows you to produce a single PDF file that includes both a complete docket sheet and images of the documents selected. If the Create Appendix option is selected, other options are disabled. See Fig. 14.

The screenshot shows the ECF Docket Sheet interface. At the top, there are navigation tabs: Bankruptcy, Adversary, Query, Reports, Utilities, Search, and Logout. Below the tabs, the page title is "Docket Sheet". There is a search field for "Case number" with the value "08-15294" and a "Find This Case" button. Below the search field, there are radio buttons for "Filed" (selected) and "Entered", followed by "to" and another empty field. There are also "Documents" and "to" fields. Under the "Include:" section, there are checkboxes for "Terminated parties" (unchecked), "Links to Notices of Electronic Filing" (unchecked), and "Document options:" (checked). Under the "Document options:" section, there are checkboxes for "View multiple documents" (unchecked) and "Create Appendix" (checked). At the bottom, there is a "Sort by" dropdown menu set to "Oldest date first", and buttons for "Run Report", "Clear", and "Make these options my default" (unchecked).

Fig. 14

OTHER NEW FEATURES

- **Cross-Document Hyperlinks**

This new version of CM/ECF 3.2 allows users to file documents that include hyperlinks to a previously filed document in the same case or another case, as well as to a document that is being filed in the same submission, such as exhibits to motions.

A document can be linked to another document in any federal court database if the court is running the appropriate version of CM/ECF that includes the hyperlink function: District (Release 3.1); Bankruptcy (Release 3.2) and/or Appellate (Release 2.0). This hyperlink functionality has been tested in Corel WordPerfect 11 or higher and Microsoft Word 2002 or higher. Hyperlinks added to documents created in other word processing programs may not function properly once the document is converted to PDF format.

For a detailed discussion of how this feature works, review the [Cross-Document Hyperlink for MS Word](#).

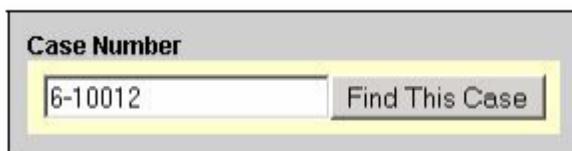
- PDF Document Headers

Court Users have the option of displaying a pdf header or not. External User will always have the pdf header displayed on a pdf document. [Click here](#)  to view example.

- Case Number Lookup

Case number lookup The process of specifying the case you want has been made easier in most report, utility, and docketing screens that require case number. Previously, you entered the year and number for a case and clicked the *Next* or other navigation button, or pressed *Enter*; if multiple cases matched, they were displayed on another screen with checkboxes for selection (no default selection was made).

Now, you can click *Next* (or other navigation button), press *Enter* or the space bar, or click the new *Find This Case* button (which appears as soon as you begin typing):



Case Number

 Find This Case

Matches are displayed on the same screen with radio buttons (the first case is selected by default); *Hide Case List* and *Show Case List* buttons allow you to control what you see.



Case Number

 Hide Case List

With the correct case selected, you must again click *Next* (or other navigation button), or press *Enter*, to proceed.

If you have clicked *Next* or pressed *Enter* and the case number you typed IS NOT ambiguous, processing continues with the next screen.

Availability and Redaction of Transcripts of Court Proceedings

In response to the Judicial Conference's new policy on the electronic availability of transcripts of court proceedings, transcripts may be viewed (but not printed) at the clerk's office public access terminal via CM/ECF. Access to the transcript via PACER is prevented for 90 days unless a user purchases a transcript from a court transcriber. A padlock icon will display on the Docket Report next to the document link for a transcript. A red lock shows that access to the document is restricted; a closed, yellow lock is displayed when there are multiple documents, some restricted and some not; and an open, green lock shows that no documents are restricted.

If an attorney in the case so requests, redactions can be made to the transcript before it is made available to all users by filing a request with the court and notifying the court transcriber, who then files a redacted transcript by the date set. This redacted version is available to any user who has permission to view the original transcript and will become available to all users after the 90-day restriction period. The original un-redacted version will remain restricted except to those who have purchased it or are using a public terminal.

Release 3.3.1 Summary of New Features

Collection of Additional Data Elements at Case Opening

The U.S. Trustee program has identified a need to receive several data elements resulting from statutory data collection requirements mandated under the Bankruptcy Abuse Prevention and Consumer Protection Act (BAPCPA) of 2005. The judiciary has agreed to modify Bankruptcy CM/ECF, in Release 3.3, to collect these additional data elements and pass them along to the U.S. Trustee Program's Executive Office for United States Trustees (EOUST). The [CM/ECF Bankruptcy Release 3.3 Case Upload File Definition](#) is available through this link at the PACER Service Center. Additional required data elements will be provided by external users. With updated petition preparation software, this new process should not take more time or be burdensome, as the data from the schedules will be copied electronically to the CM/ECF System. External users should contact their respective petition preparation software vendors to obtain any needed upgrade.

New Format for Trustee's No Distribution Report

In accordance with Section 602 of BAPCPA, the EOUST is requiring uniform forms for final reports. The Trustee's Report of No Distribution in CM/ECF has been modified to meet the mandated variations of this report. Four new text only docket entries have been created for this process:

- 1) Chapter 7 Trustee's Report of No Distribution;
- 2) 2) Chapter 7 Trustee's Report of No Distribution - minimal funds collected;
- 3) 3) Chapter 7 Trustee's Report of No Distribution - dismissed or converted, some funds collected; and
- 4) 4) Chapter 7 Trustee's Report of No Distribution - dismissed or converted, no funds.

Joint Debtor Disposition

The Bankruptcy CM/ECF System currently tracks only one set of data items for the discharge, dismissal and disposition of a bankruptcy case. With Release 3.3, these items will be recorded for each debtor in a joint case. Numerous areas of the CM/ECF System will display this data for both debtors.

Updates to Screens and Reports

- **Involuntary Case Opening**

Estimated assets and liabilities fileds have been deleted from Involuntary case opening since that information is unknown at the time of filing.

CM ECF Bankruptcy Adversary Query Reports Utilities Search Logout

Open Involuntary Case

Fee status Paid

Nature of debt

Type of debtor

- Individual
- Corporation (includes LLC & LLP)
- Partnership
- Other

Nature of business

- Health Care Business
- Single Asset Real Estate
- Railroad
- Stockbroker
- Commodity Broker
- Clearing Bank
- Other
- Tax-Exempt Entity

Next Clear

- **Docket Activity Report**

The event name now appears on the Docket Activity report when full docket text option radio button is selected. Prior to this, only the type of category appeared.

CM ECF Bankruptcy Adversary Query Reports Utilities Search Logout

Docket Activity Report

U.S. Bankruptcy Court -- Live Database

Report Period: 9/1/2007 - 10/21/2008

Case	Doc Id	Date Entered/Filed	Category/ Event	Judge/ Trustee	Notes
08-10005 Rawson Industries Inc Office: 1 Type: bk Chapter: 11 Assets: Yes		Entered: 10/15/2008 15:39:02 Filed: 10/15/2008	Category: court Event: Close Adversary Case	Judge: Anderson	Subm. by: D. Liska Group: crt

Docket Text for above court: Adversary Case 1:08-ap-1017 Closed (Liska, Deanna)

- Docket Activity report can be run for open and/or closed cases.

Docket Activity

Case number

Judge Office Case type

Trustee Chapter Filer type

Category Event

Terminal digit(s) Open cases Closed cases

Entered between to Summary Text

Entered today and not QC'd Full Docket Text

Sort by

Run Report Clear Make these options my default. Schedule this to run

- **Query**
A new option has been added to the Query search screen to look for open and/or closed cases.

Query

Search Clues

Case Number

Last / Business Name (Examples: Desoto, Des*t)

First Name Middle Name

SSN / ITIN Tax ID / EIN

Type Open cases Closed cases

- **Query on Associated Cases**
The term "Closed" now appears for terminated adversaries when a query is run on associated cases.

08-01017 Smith v. Brown
Case type: ap Related bankruptcy: 08-10005 Judge: Charles Anderson
Date filed: 10/15/2008 Date of last filing: 10/21/2008
Date terminated: 10/21/2008

Associated Cases

Case	Associated Case	Type
08-10005 Rawson Industries Inc	08-01017 Smith v. Brown	(closed) Adversary

- **PACER Free Look Message**
The message "without incurring a PACER fee" has been removed from the Document Selection Menu of expired Notice of Electronic Filings.

ECF Query Reports Utilities Logout

Document Selection Menu

Multiple Documents

To view the main document and its attachments, click on the hyperlinks displayed on this menu. You may incur a PACER fee to view CM/ECF documents from hyperlinks within the documents.

Select the document you wish to view.

Part	Description	
1	Main Document	1 page
2	Exhibit	1 page

Performance Issues - Bankruptcy CM/ECF Release 3.3.1

As set forth in the December 16, 2008, Public Notice, a number of bankruptcy courts reported experiencing performance-related issues with Bankruptcy CM/ECF Release 3.2 (and other issues discovered with respect to Release 3.3). For this reason, the Administrative Office of the United States Courts recommended that those courts that had not yet upgraded to Release 3.2 consider not upgrading until the issues had been resolved. The Court elected to defer the upgrade for this reason. Modifications have been made to the Bankruptcy CM/ECF System, which have been incorporated into Release 3.3.1, to address these performance issues (users had reported noticeably longer response times, which affected external users the most). One of the enhancements to Release 3.2 was the addition of cascading or pull-down menus. This enhancement has not been activated since it was determined to be one of the factors contributing to longer performance response times especially for external users. Activation of this feature will be considered later.

External users making use of Internet Explorer as their browser of choice should make use of the following setting: Tools, Internet options, *General* tab, Browsing History, *click* Settings. Under "Check for newer versions of stored [cached] pages," *select* "Every time I start Internet Explorer."