Administrative Office of the U.S. Courts

CM/ECF

Bankruptcy Release 4.0

Notes for PACER Users

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Bankruptcy Release 4.0

This document summarizes the changes you may notice when you use CM/ECF in a U. S. Bankruptcy Court that has installed Release 4.0 of the application. Note that what you see in a particular court may be different from what is described here.

Changes seen when you are logged in with a PACER or CM/ECF filer account

RSS Feed Technology

Some courts may now offer an RSS feed with links to docket sheets and documents. A standard RSS reader is not provided with CM/ECF, but the software supports the readers included with the standard supported browsers (Firefox 3.5 and Internet Explorer 7 and 8).

If the court offers a feed, it is accessible from the Court Information screen:

Court Information

Court Details	
Court's Name	District of New Jersey (AO-DC on Sally)
Software Version	CM/ECF-BK V4.0.0
ECF Go Live Date	May 31, 2006
Maximum PDF File Size (MB)	9.0
Maximum Merge Document Size (MB)	30
RSS Feed Docket entries of type: answer,appeal,court,motion,order	Entries made in the last 12 hours - Public Users
PDF/A Compliance Required	n

The court may select to activate only some event types to appear in the feed; for each activated type, an entry is made to the RSS feed every time a docket entry is made. Clicking on the link displays brief details of recent events in the case, along with a list of event types that have been activated by the court, as shown here:

District of New Jersey (AO-DC) - Recent Entries

Docket entries of type: answer,appeal,court,motion,order

07-00004-11 Door Store
Thursday, March 05, 2009 10:08 AM

Type: bk Office: 1 Chapter: 11 Trustee: Abramowitz, Arthur [Adequate Protection] 63

07-00004-11 Door Store
Thursday, March 05, 2009 10:05 AM

Type: bk Office: 1 Chapter: 11 Trustee: Abramowitz, Arthur [Response] 62

07-00004-11 Door Store
Thursday, March 05, 2009 10:04 AM

Type: bk Office: 1 Chapter: 11 Trustee: Abramowitz, Arthur [Accounting] 61

09-01000-11 MEGA MOTORS
Thursday, March 05, 2009 10:03 AM

Type: bk Office: 3 Chapter: 11 Trustee: Burton, William [Response] 4

09-01000-11 MEGA MOTORS
Thursday, March 05, 2009 10:00 AM

Type: bk Office: 3 Chapter: 11 Trustee: Burton, William [Appoint Trustee] 3

At any given time, the feed displays all entries meeting the court's criteria (listed at the top of the RSS feed output) that have been docketed within the last 12 hours.

From the screen shown above, you may subscribe to the feed if you have configured third-party software to handle this.

You may click on the case number to view the docket sheet, and click on the document number to view the related document. All information accessed in this manner is subject to standard PACER fees, and is displayed only if you have permissions to view the information. There is no fee for the initial RSS feed report.

## Avoiding Login Prompts When Clicking on Links within the RSS Reader

You can avoid being prompted for a login when clicking on a case number or document number hyperlink from within the RSS feed reader by:

- Ensuring that the most recent browser session is CM/ECF.

- Being already logged in to CM/ECF.

User Interface Enhancements

Time selection icon

On screens allowing a time selection, the time field now includes an icon to populate the time from a graphic. When clicked, the icon displays a clock graphic:
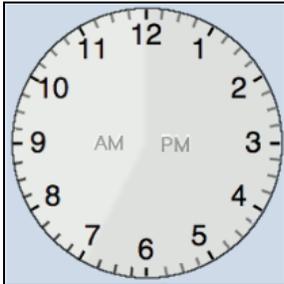
Move the cursor around the clock's face to select a time; the time selection is displayed in the box. The lighter shading indicates an assumed AM time, and the darker shading indicates default PM. This is also populated in the box, and can be changed manually.

To type in the box without using the clock icon, you may type in standard format (e.g., "8:45 AM"), or omit the minutes for on-the-hour events (e.g., "10 AM").

Query

When a name search is made, additional information is now displayed on the results page to allow a user to select the correct case.
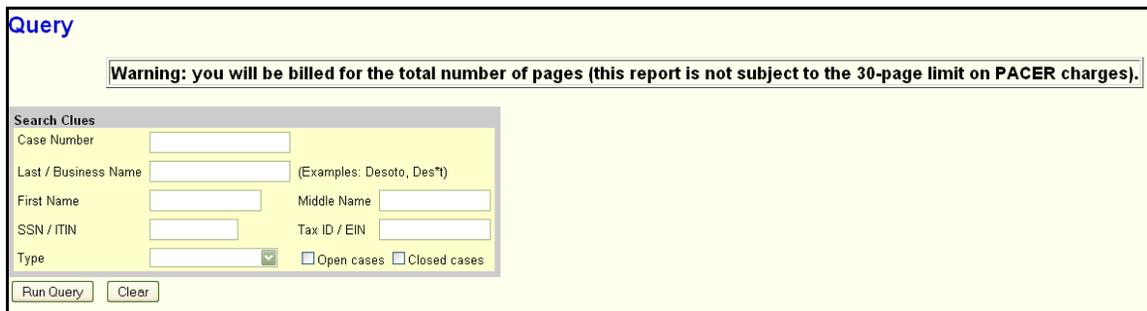
For each name result, a row of information is displayed to the screen for each case in which that person is involved, as shown below:

<div align="center">

Select a Case

</div>

There were 5 matching persons.

There were 5 matching cases.

Name	Case No.	Case Title	Chapter / Lead BK case	Date Filed	Party Role	Date Closed
Green, Valerie (pty) (1 case)	02-59757-KCF7	Valerie Green	7	09/30/02	Debtor	01/15/03
Green, Valerie L. (pty) (1 case)	00-51302-RTL	Cornelius Green and Valerie L. Green	13	02/09/00	Debtor	02/10/03
Green, Valery J. (pty) (1 case)	99-15931-GMB	Valery J. Green	13	06/28/99	Debtor	N / A
Greene, Valerie A. (pty) (1 case)	01-13362-1-JHW	Richard W. Petravich and Valerie A. Petravich	13	04/03/01	Debtor	11/29/01
Greene, Valerie A. (pty) (1 case)	02-11264-1-JHW	Richard W. Petravich and Valerie A. Petravich	7	02/08/02	Debtor	08/26/02

- Previously, two characters of the last name were required for a name search on the Query screen, making it impossible for a user to search for a person with a single-character last name. Now, if a single character is entered into the last name field, it is evaluated for exact

name matches only; a message appears on the screen in these cases, informing the user that only exact matches will be found.

- There was previously no way for internet users to view a document without first viewing the docket report. Now, the "View Document" link allows you to enter a document number in the case currently being viewed, and view the document directly. If multiple documents are associated with a document number, the Document Selection Menu appears, from which you can choose the desired document.

- A warning message has been added to the Query search screen, indicating that there is no 30-page PACER billing cap on the results page.

- On the "Associated Cases" screen, a new "Other Filings by Same Debtor(s)" section has been added. It displays all cases that share a debtor or joint debtor with the case currently being viewed.

- Tracking Filing Fee Balance

In previous releases, there was no way to track the balance due when a filing fee was paid in installments. Now, for pending cases, the outstanding filing fee balance is tracked in CM/ECF.

A new "Filing Fee" selection is available from the main Query output screen. For bankruptcy cases, this option displays a screen listing the filing fee amount, details on any payments that have been made, and the outstanding balance due. An additional section displays any related adversary proceedings with deferred filing fees.

For adversary and miscellaneous proceedings, the "Filing Fee" query displays the case opening fee and the balance due (if the filing fee was deferred).

Reports

Calendar Events

- The report output has been enhanced to provide easier access to related proceedings. Previously, information about proceedings related to an event was only available on the Related Proceedings report. Now this information can be accessed without leaving the Calendar Events output page.

```
09:00 AM
            2  09-01000-13 Andrew B. Korn and Mabel Korn          (docket entries only)        Claims Register

                                                      FeeDueBK, FeeDueSTAY, FeeDueCONV

            Chapter: 13
               Judge: JUDGE J TESTJUD
               AttyTester A. Robbins representing Andrew B. Korn (Debtor)
               AttyTester A. Robbins representing Mabel Korn (Joint Debtor)
               Arthur Abramowitz (Trustee)
               (no aty) representing U.S. Trustee (U.S. Trustee)
         2-1  ⊞ Motion to Extend Time re: to extend time Filed by AttyTester A. Robbins on behalf of Andrew B. Korn , Mabel Korn .
         2-2  ⊟ Motion to Dismiss Case re: testing Filed by Arthur Abramowitz .

                                                        Related Proceedings:

               Filing Date #  Related Docket Text
               04/24/2009 14 Objection to (related document: 13 Motion to Dismiss Case filed by Trustee Arthur Abramowitz) filed by AttyTester A. Robbins on behalf of Andr
                             Mabel Korn. (Filed: 04/24/2009)

               Calendar Text: RE: Doc #14; Objection
```

- Rather than displaying the silver ball icon as a link to the Related Proceedings report, now a plus ⊞ icon is displayed beside each event. Click the icon to view related proceedings on the same screen, below the original event. The icon will change to a minus ⊟ symbol; click again to collapse the display.

- A new check box on the selection screen, labeled "Display only proceedings directly related to calendar event", controls whether indirectly related proceedings (i.e., proceedings related to a directly related proceeding) are displayed.

- A radio button option has been added to the selection screen, labeled "Initial display of related proceedings." This selection determines whether all related events are displayed by default (Expanded), or none are displayed by default (Collapsed). In either case, you may change the display on the report output for a single calendar event using the plus and minus icons as described above.

- The "Select a Previously Created Report" option is now labeled "Display a saved report." It now appears in the upper right corner of the selection criteria screen.

- Previously, document numbers that were displayed in brackets within the docket text were not hyperlinks. Now, all such document numbers are hyperlinks to the documents.

- Case flags are now displayed above the case information for all cases.

- Additional hyperlinks have been added to the report output. In addition to the Docket Report hyperlink, a "docket entries only" hyperlink is displayed, which displays all docket entries in the case without the additional party and case information displayed on the Docket Report. A link to the Claims Register has also been added. The link leads to the Claims Register selection criteria screen, where the case number and related claim number(s) (if any) are pre-populated. For an adversary case, the link leads to the related bankruptcy case Claims Register.

- A sequential number is now displayed to the left of each entry for easy reference.

- An option to sort the results by Trustee has been added.

Cases

The fields in the data record have been modified. If party information is requested and the party is a debtor, plaintiff or defendant, the record includes information about the party's attorney (or, if applicable, indicates the party's pro se status). Additional fields to capture this data have been added to the end of the record.

The current fields are as follows:

1. Formatted case number with 2-digit year
2. Formatted case number with 4-digit year
3. [CM/ECF internal]
4. If this is a bankruptcy case, the chapter under which it was filed.
5. If this is a bankruptcy case that has been converted, the previous chapter.
6. If this is a bankruptcy case, the date on which an order of conversion was filed.
7. If this is a bankruptcy case, the date on which the case or the first debtor was discharged.
8. Date on which the case or the first debtor was dismissed.
9. Date on which the case was filed or reopened.
10. Date on which the case was entered into CM/ECF.
11. Date on which the case was closed.
12. The disposition code for the case, or for the first debtor in a joint case.
13. Code that identifies the type of case, "ap" = adversary proceeding, "bk" = bankruptcy,"mp" = miscellaneous proceeding.
14. If this is a bankruptcy case, the trustee's last name.
15. Judge's last name
16. If this is a bankruptcy case, the name of the county in which it was filed.
17. The name of the office in which the case was filed.
18. If this is a bankruptcy case, status of filing fee payment: "Paid", "Installment", "IFP Filing Fee Waived", "Installments Completed", "Fee Not Paid", or blank.
19. If this is a bankruptcy case, are there assets in the case? "yes", "no", or blank.
20. If this is a bankruptcy case, the disposition of the case or of the first debtor (e.g., "Discharge granted").
21. If this is a joint bankruptcy case, the discharge date of the joint debtor.
22. If this is a joint bankruptcy case, the dismissal date of the joint debtor.
23. If this is a joint bankruptcy case, the disposition code for the joint debtor.
24. If this is a joint bankruptcy case, the disposition for the joint debtor.
25. If this case is an adversary proceeding, a code for the divisional office in which the bankruptcy case was filed.
26. If this case is an adversary proceeding, the sequence number for the related bankruptcy case.
27. If this case is an adversary proceeding, the year (1 or 2 digits) of the related bankruptcy case.
28. If this case is an adversary or miscellaneous proceeding, its disposition (e.g., "Dismissed for want of prosecution").
29. Party's first name
30. Party's middle name
31. Party's last name
32. Party's generation
33. Party's office or agency

34. 1st line of party's address
35. 2nd line of party's address
36. 3rd line of party's address
37. Party's city
38. Party's state
39. Party's ZIP code
40. Party's country
41. Party's phone
42. Party's Social Security Number (the first 5 characters are masked for public users)
43. Party's Tax ID
44. Sequence number of the party within the case
45. The role of the party in the case
46. The party terminated date, if applicable (debtor, plaintiff and defendant parties only)
47. Short title of the case (omitted when party information is included)
48. Attorney's first name
49. Attorney's middle name
50. Attorney's last name
51. Attorney's generation
52. Attorney's office or agency
53. 1st line of attorney's address
54. 2nd line of attorney's address
55. 3rd line of attorney's address
56. Attorney's city
57. Attorney's state
58. Attorney's ZIP code
59. Attorney's country
60. Attorney's phone

- An option to filter the report by attorney name or Bar ID now appears on the selection screen. When a name is entered, a list of matching attorney names is displayed, of which you may select one or more. Check boxes allow you to search for attorneys by party role: debtors, plaintiffs, defendants, creditors, or all. Alternatively, you can choose to view only cases with pro se filers.

- The report is now limited to a range of 31 days. This prevents internet users from unintentionally requesting a large data set, which would result in an unnecessarily large PACER fee.

- For users who do not have access to sealed cases, limited sealed case information is displayed on the Cases report. This report displays the case number, entered and filed dates, office, and generic case title text according to case type: "SEALED" for bankruptcy cases, "SEALED v. SEALED" for adversary and miscellaneous proceedings. Note that the fields displayed are the only fields by which sealed cases may be filtered; if other search filters are used (e.g., chapter, judge), those filters will not affect which sealed cases appear on the report.

Claims Activity

- For any closed case, the case closed date is displayed next to the case number on the report output.

- Previously, when a claim was transferred via a Transfer Agreement, the filer to whom the claim was transferred was listed as the filer of the original claim. This was incorrect, and inconsistent with the information displayed on the Claims Register. Now the original filer name is displayed for the original claim, and the filer to whom the claim was transferred is listed for subsequent claim actions.

Claims Register

- Corrections:

  - Previously, the "Entered by" field displayed the original filer, even if a more recent claim amendment or part was entered by a different user. Now the "Entered by" field displays the filer of the most recent claim record.

  - Under certain circumstances, the "Entered by" field was not displayed on the report output. This has been corrected.

  - Previously, a certain scenario caused the "originally filed as" claim number displayed in the History section to be incorrect. This has been corrected.

  - For cases that were converted from BANCAP, the Claim History link sometimes displayed two fields ("Unknown Claimed Amount" and "Admin Claimed Amount") on the same line. This has been fixed so that the values display on separate lines.

Docket Activity

- The report is now limited to a range of 31 days. This prevents internet users from unintentionally requesting a large data set, which would result in an unnecessarily large PACER fee.

Docket Report

- Previously, each party's alias was printed on two lines on the Docket Report; alias type on the first line, and name on the second line. Each alias record is now printed on one line.

- The "Include headers…" check box now defaults to checked; you no longer need to check the box each time you run the report to see PDF headers on documents.

- The county of residence is now displayed along with the address information on the report output for debtors and joint debtors.

- All attorney email addresses displayed on the Docket Report are now hyperlinks. Clicking on the hyperlinked email address opens the user's default email program, and begins a new email to the selected address.

- A "Show Associated Cases" hyperlink previously appeared on the Docket Report output for all cases; the hyperlink leads to the Associated Cases query page. This feature has been enhanced to appear only when the case being viewed has an active association.

Miscellaneous

- The browsers supported for the application are Internet Explorer 7/8 and Mozilla Firefox 3.5; Mozilla Firefox 2 and Internet Explorer 6 are no longer supported.

- Mozilla Firefox 3.5 and Internet Explorer 8 do not allow users to type directly into a file name box on a document upload screen; instead, you may click the "Browse" button, then search for the document or type the file name in the resulting window.

- Where the full document path and title were previously displayed (e.g., on the Notice of Electronic Filing), now only the document title is displayed when using Mozilla Firefox 3.5; using Internet Explorer 8, the full path is displayed for the main document, and the document title only is displayed for attachments.

- The Court Information utility now includes a "PDF/A Compliance Required" indicator, which is currently set to "n"; this will be used in a future release to indicate whether the court requires documents to meet a PDF/A technical standard. No changes to PDF document requirements are implemented in release 4.0.

- Previously, document hyperlinks no longer changed color when visited. This has been fixed.

- Previously, document number hyperlinks changed when the cursor passed over them for the first time. Only after this change was the hyperlink fully correct. This has been fixed; the hyperlinks are now accurate when the page is initially loaded.

- If you wish to use the keyboard rather than the mouse, pressing the Enter key now gives the same result as clicking the button that submits the screen. Pressing the space bar also works if the focus is on the button that submits the screen.

  Note: This key action was previously available on a number of screens throughout the application, but has been enhanced to be available on all screens.

- All data entry fields in CM/ECF have been modified to accept only the following list of HTML formatting tags from internet users:

  <abbr>, <acronym>, <address>, <b>, <big>, <blockquote>, <cite>, <del>, <dfn>, <em>, <font>, <i>, <ins>, <pagenum>, <q>, <s>, <small>, <strike>, <strong>, <sub>, <tt>, <u>.

  Any other HTML tags will not perform their intended function.

Changes seen only when you are logged in with a CM/ECF filer account

Electronic Order Filing

A new Electronic Order Filing module allows proposed orders to be entered and tracked in CM/ECF, similar to the locally developed E-Orders program in use in some courts.

Some courts may allow internet users to file proposed orders directly into the system through a new docket event. Once the document is uploaded, it is automatically forwarded to the judge's chambers for review. From that point onward, you may use the new Order Query report (described later) to view the current status of any of your proposed orders.

Single Order Upload

If the court permits, attorneys may upload a document using the "Single Order Upload" event, available through the Bankruptcy and Adversary menus. When you begin docketing, you are prompted for the case number and the related event. If you have previously uploaded a proposed order for the same case and docket entry, and that order has not yet been sent to the judge for signature, you are able to replace the previous document with a new proposed order.

The next docketing screen requests specific information about the order being uploaded:

The "Order type" selections may vary by court. If the order type selected is "Hearing Held" or "Hearing Scheduled", the hearing date must be completed.

Batch Order Upload

If permitted by the court, Chapter 13 trustees may upload multiple proposed orders simultaneously with the "Upload Batch" function. If batch orders already exist for the case numbers entered, the current transaction will replace the orders already docketed. Trustees may upload and replace batch orders only for cases in which they are involved.

The "Order type", "Order description" and "Hearing date" (if applicable) are entered once, and apply to all selected cases. Available order description selection options may vary by court. After order information is entered, a proposed order document may be uploaded for each case.

After an order has been uploaded, the status of the order may be viewed using the Order Query report. For more information about this report, see the *Reports* section.

Filing Agents

Some attorneys use paralegals to assist in filing. Previously, there was no way to link multiple accounts to the same attorney, thereby allowing paralegals to docket on behalf of the attorney. Now, a new user type is available, called "Filing Agent". An attorney or trustee may link to several filing agents, so that when an agent files on behalf of the attorney, the docket text shows the attorney name. The option to associate multiple filing agents is available for attorney, trustee and US Trustee user groups.

Filing as an Agent

When an agent logs into the application, the access permissions available are dependent on the filer for whom the agent is docketing. Once the appropriate filer is selected, the permissions that filer has granted to the agent remain in place unless and until the agent selects another filer.

Selecting a Filer

If an agent works for only one filer, the agent's transactions are always made on behalf of that filer. However, if a filing agent works for more than one filer, the agent must select the desired filer from a drop-down list upon logging into the application. The selection made upon login can be changed at any time without logging out, as described below.

Changing Filers

When the agent is logged in on behalf of an associated filer, the name of the filer is displayed on the menu bar to avoid confusion:

If the filing agent is associated with more than one attorney or trustee, a *Change user* button appears on the menu bar; this button displays a list of all possible filers; clicking a name changes the user.

Filing Output and Display

In an entry filed by an agent, the docket text and all associated information indicate that the entry was filed by the filer himself; no indication is made that it was filed by an agent. However, this information is logged and available to court users and filers with agents. Throughout most of the application, the agent's name does not appear; the exceptions are the System Transactions Report for court users and the Transaction Log for the filer.

Transaction Log

For a filer with one or more associated agents, a new "User" filter now appears on the Transaction Log report. This filter lists the filer's name, as well as the names of all associated agents for that filer. By selecting all names listed, the filer can view all transactions logged in his name, either by the filer himself or by one of his agents. An additional "Filing agent" sort option appears when filing agents are present.

If more than one name is selected from the list, entries made by agents include the agent's name in the "Id" column.

Maintaining Filing Agents

Filing agent associations can be maintained by the court or by the filer (if the court permits); maintenance options include which agents are associated with a filer, what the access permissions are for each agent, and whether the agent should receive notices for filing.

Associations

If the court permits, attorney and trustee users may modify their own filing agent accounts via the "More User Information" screen on the "Maintain Your ECF Account" utility.

More User Information for Maria Luisa Taglioli

Login MarilusATY   Last login 03-01-2010 13:59

Password ***********   Current login 03-03-2010 07:25

[minimum 8; upper- & lower-case letters; include digit or special character]

Create date 11/07/2008

Registered Y   Update date 03/03/2010

Internet Payment Y

Groups ADI, Attorney, Claims Upload

Filing agents

Deactivate

☐ Green, Davis

Find filing agent [   ] 🔍

[Return to Account screen] [Clear]

In the "Filing agents" section of this screen, any current filing agents associated with the account being edited are listed beside check boxes.

To associate a filing agent, search for the name of the filing agent in the "Find filing agent" box. This generates a panel listing all filing agents that matched your search. If the filing agent you wish to add does not appear on the list, you may see a "Create a new filing agent" hyperlink at the bottom of the result list. If it appears, click it to add a new agent. If it does not, contact the court to add a new agent.

To remove a currently listed agent, the filer should select the "Deactivate" box next to the name. When the selections are saved, the association record between the filing agent and the filer is deactivated. Although the agent is no longer associated with the filer, the agent can be re-associated easily in the future by clicking on the "My inactive filing agents" link below the search box.

Clicking the link opens a panel with a listing of all filing agents that were formerly associated with the user, along with buttons for each name. Clicking a button re-associates the selected filing agent with the user account being edited.

Any action taken to activate or deactivate a filing agent from an associated account is recorded, and appears in the Transaction Log report.

Access Permissions

Access permissions for filing agents are determined and maintained by the court or by the associated attorney/trustee. The filing agent cannot maintain his own access permissions.

If the court permits filers to maintain agent information, each active filing agent name appears as a hyperlink. If clicked, it leads to a screen that allows the filing agent's permissions to be set. This new screen displays information for "Internet Payment", "Group", and "Permissions"; those fields do not appear on the filing agent's "More User Information" screen.

A filing agent may be granted all or a sub-set of the permissions granted to the filer; however, any additional files granted via the "Allow access in addition to group permissions" feature in the filer's account are not available to the agent. To grant the agent access to these files, the court should create a new access group with permission to the files, and then the filer and agent should both be added to the new group.

Regardless of filing permissions, an agent is not able to view or file restricted or sealed documents or docket entries.

Noticing

When an agent becomes associated to a filer, the *Email Information* button on the agent's "Maintain Your ECF Account" screen is disabled. By default, the agent does not receive notices for any docket events made by the agent.

If the filer would like to establish noticing for an agent, the filer must modify his or her email information in the "Maintain Your ECF Account" utility, adding the agent's email address to the "additional addresses" section.

Sealed Information

Filing Sealed Documents and Entries

If the court allows, internet filers may now file documents and entries under seal. If events to seal are available, filing through one of these events automatically restricts the document and/or event information. If a sealed document is filed, for example, only the filer and designated court personnel are able to view the document.

Viewing Sealed Information

Courts may now choose to electronically seal documents, entries and cases in CM/ECF. The court determines the appropriate access level, and all related information is restricted only to those appropriate users who are granted access.

If you **are** authorized to see certain sealed data, the information appears identical to unsealed information in CM/ECF, except that warning messages appear to remind you that the information being viewed is sealed and must not be shared.

If you are **not** authorized to see certain sealed data, the information cannot be viewed (except for limited information displayed on the Cases Report). Instead, a message appears, indicating that the information you are attempting to view is restricted.

Case Opening

- Previously, an attorney opening an adversary case was prompted to create an association with the plaintiff in the case. Now, a "Counsel for" selection option appears (if the adversary proceeding is not a complaint) to allow the attorney to indicate which party he represents: if

the default "Plaintiff" is selected, the filing attorney is automatically associated with the plaintiff; if "Defendant" is selected, the filer may make the attorney association during docketing.

- During adversary/miscellaneous proceeding filing, the filer was previously always able to add the defendant's attorney to the case while adding the defendant. Now, each court determines whether the *Attorney* button appears to attorney filers on the defendant's Add Party screen.

Case Upload

- Corrections:

  - Previously, the Creditor Matrix file type was not validated; any type of file could be uploaded. Now only plain text files are accepted.

  - Deadlines can be satisfied or terminated by events in Case Upload. Previously, if multiple deadlines were configured to be satisfied/terminated at the same time, only one deadline would be correctly updated, and other deadlines would remain pending. This has been fixed.

Claims/Creditors

- Previously, when a claim was filed, then transferred and amended, the Claims Activity report incorrectly listed the new owner as the filer of the original claim. This has been fixed; the original filer remains listed with the original claim and any claim actions that took place before the transfer, and the new owner is associated only with those claim actions that occurred after the transfer.

Creditor Maintenance: Upload a Creditor Matrix File

- In a Creditor Matrix file for upload, CM/ECF previously only accepted case numbers in the format YY-#####; any other case number format produced an error message. Now any of the following case number formats are accepted: YY-#####, O:YY-TT-#####, O-YY-TT-#####, O:YYTT#####, or YYTT#####, where YY is the year, ##### is the number, O is the office code, and TT is the type (e.g., bk or ap).

Claim Filing – Proof of Claim

- Using Mozilla Firefox, if the user submitted the Proof of Claims screen with a value in the "Amends Claim #" field, then clicked the Back button, the value entered was not re-displayed on the screen. This has been fixed.

- Proof of Claim notices/receipts previously did not show the types of claim amounts requested. Now the amounts provided are as follows: Amount Claimed, Amount Secured, Amount Priority.

- The "File another claim" hyperlink was previously displayed at the bottom of the Proof of Claim receipt. Now the hyperlink has been moved to the top of the receipt for easier access.

- The Proof of Claim entry screen text and formatting have been modified to match the b10 form. Additionally, the amount claimed and amount allowed totals are no longer calculated. Instead, the "Amount claimed" and "Amount allowed" fields constitute the totals of the various amounts claimed and allowed; the user enters the totals in these fields, and no additional total is calculated.

Docketing

- Trustee's 341 Filings

The Trustee's 341 Filings module has been enhanced to allow multiple meetings to be continued simultaneously. Additionally, the output now displays only information and selection options valid for the chapter(s) of the cases displayed. An option to sort by time has been added to the selection criteria screen.

On the Trustee's 341 Filings filter screen, a new "Continue multiple 341 meetings" check box has been added to the screen. If this box is checked, a new screen is displayed to allow the trustee to continue 341 meetings for some or all of the cases with meetings on the selected date:

This screen displays all cases for which the trustee has 341 meetings scheduled for the selected day. The trustee makes date, time and location selections. An "Additional docket text" field allows the trustee to add information to the docket text; to add the text "Debtor appeared" and/or "Debtor absent from required meeting", the user may check the boxes to the right. These fields may also be used in conjunction: for example, typing the text "Joint debtor absent" in the text field and checking the "Debtor appeared" check box ensures that sufficient information for both debtors is included in the docket text.

The cases displayed are grouped by chapter; and the check box in the header row (beside the "Case" label) sets all case check boxes to its own value.

If the trustee runs the report without selecting the "Continue multiple 341 meetings" box, the Trustee's 341 Filings screen is displayed:

Cases are grouped by chapter, and corresponding headers and options are tailored to the case chapter. For all options other than "No Action", a text box and check boxes for "Debtor Appeared" and "Debtor Absent from Required Meeting" appear.

- Display and Selection of County Codes

Previously, each court defined local counties for display throughout the application. Now, all U.S. counties are available for selection in any court.

Note: the county format has been changed to include the two-letter state abbreviation (for example, LOS ANGELES-CA). This format is displayed throughout the application.

On docketing screens where party information is entered, the county list automatically displays all counties in the state where the court is located. If the party's county is outside the state, enter the correct state in the "State" field; this will update the county selection list to display all counties in the state you have entered.

- Corrections:

➢ Previously, when a user tried to upload multiple PDFs with a large combined size, the transaction did not always complete properly; instead, the size of the upload caused the transaction to time out. This has been corrected.

➢ If an attorney or other external filer used Automatic Judge/Trustee Assignment, the resulting NEF email would previously contain no document hyperlink; thus, when the court generated the associated form, it was not accessible from the NEF email. This has been corrected.

➢ Previously, when a trustee ran the "Report of no distribution" event with multiple cases from the Trustee's 341 Filings menu, the asset notice field was not updated for all cases. This has been fixed.

➢ Hearing events can now be set or modified with the Trustee's 341 Filings module.

➢ When adding a joint debtor during case opening, a check box appears to allow the main debtor's address to be copied to the joint debtor. In a previous release, this check box did not always display; this has been corrected.

Noticing

- Previously, when a party was terminated through a docketed event, the terminated party did not receive notice of the event. Now the terminated party is included in the noticing list.

- The BNC Certificate of Notice now includes all entities selected as form recipients who received a Notice of Electronic filing through CM/ECF, along with the date of electronic notification and the entity's name and email address. Additionally, the BNC file now contains an email address (of the debtor's attorney, or of the debtor if pro se), so that the BNC may email the bypass list.

- The title of the BNC PDF certificate has been changed to "Imaged Certificate of Notice"; previously, the document's PDF header displayed the old title, "Imaged Certificate of Service". For documents entered after CM/ECF version 4.0 is installed, the PDF header will match the new title.

- Corrections:

  ➢ Previously, when two users entered the same email address, summary email notices were not sent. This has been fixed.

  ➢ Depending on court configuration, a case number may be displayed in the subject line of email notices sent when edits are made to the case. Previously, if a case contained docket entries without document numbers, the document number listed in the NEF email subject line sometimes did not match the actual document number. Now the number listed in the subject line always corresponds to the actual document number; if an entry without a document number is updated, the text "*(no document number)*" is displayed in the email's subject line. Additionally, the formatting of the subject line information has been updated for readability.

Query

- In the "History/Documents" query, The "Private Event" column is now titled "Entry Restrictions", to accommodate the expanded restriction options for individual events.

Reports

Claims Register

- When a claim was edited, the filer's name was overwritten with the name of the user who made the edit to the claim. This has been changed so that the original filer's name is retained.

- Previously, special characters in a debtor's name were not always displayed correctly on the Search Results screen. This has been corrected.

Docket Activity

- The "Only cases to which I am linked" check box, which was previously displayed for attorneys only, is now also displayed for trustees and US Trustees.

Order Query

The Order Query report displays the status of orders entered through the new order filing module. The report may be run for a specific case or by date range; additional check boxes allow filtering by order status:

Order Query

Case Number [ ]
Submitted date [ ] 🔳 to [ ] 🔳
Docket date [ ] 🔳 to [ ] 🔳
☑ Include proposed orders where no action was taken.
☑ Include proposed orders that have been docketed.
☑ Include proposed orders that are being processed.
[Next] [Clear]

The report provides status information, as well as hyperlinks to the case docket and to the order document.

Maintain Your ECF Account

- The following additional options appear on the "Email Information" screen, as described below:

  ➢ You are now prompted to enter your primary and secondary email addresses twice; if the two fields do not match, an error message is displayed, and the address is not saved until the fields agree.

  ➢ If the court permits, you will see an option to receive notices only in those cases in which you are involved, and not in their related cases.

- Corrections:

  ➢ On the More User Information screen, the "Create date" field was not aligned with the other fields on the screen. This has been corrected.

  ➢ On the More User Information screen, the "Current login" field showed the same value as the "Last login" field, and did not match the current value in the database. This has been corrected.

Maintain Your Login/Password

This utility may appear if the court does not allow public filers full access to modify their user accounts. Clicking the link allows you to change your CM/ECF password.

Internet Payments Due

Previously, when an internet payment was made, all fees incurred up to the time of payment had to be paid at once. Now you may choose to pay some or all of the fees in a given transaction.

On the "Internet Payments Due" screen, all outstanding fees are displayed, along with a check box for each fee. To select the fees to pay, the user should check the boxes next to the desired fees, then click the *Next* button.

Internet Payments Due

Select all

Check Fees to Pay	Date Incurred	Description	Amount
☐	2008-07-22 08:29:23	Voluntary Petition (Chapter 7)(08-10079-7) [caseupld,1027u] (200.00)	$ 200.00
☐	2008-07-25 12:25:50	Voluntary Petition (Chapter 7)(08-10082-7) [caseupld,1027u] (200.00)	$ 200.00
☐	2009-08-31 09:33:34	Voluntary Petition (Chapter 7)(09-01092) [misc,volp7a] (200.00)	$ 200.00

Next   Clear

The next screen displays a summary of the selected fees, along with a *Pay Now* button. Clicking this button opens a panel to allow payment.

- Payment using Automated Clearing House (ACH)

Filers paying filing fees over the Internet now have the option to pay by bank account debit (Automated Clearing House) from the Treasury Department's Internet payment system, if the court allows.

After confirming the selected fees to pay, you are asked for payment information to pay the total of selected fees, either by credit card or by bank account debit (ACH). The screen below is displayed by the Treasury Department site:

To pay by bank account debit, enter the required information and click *Continue with ACH Payment*.

Miscellaneous

- Password Security Enhancement

Password security has been improved. All CM/ECF passwords must be a minimum of 8 characters, and must include both upper- and lower-case alphabetic characters and at least one digit or special character [e.g., 0-9, @, #, $, %, &, *, +, :].

Additionally, after five invalid login attempts, your account is locked out for a five-minute waiting period. Each subsequent invalid entry increases the resulting lockout period.

The first time you log in after the court has implemented release 4.0, you will see the following message if you are able to maintain your own account; if not, a similar message will appear:
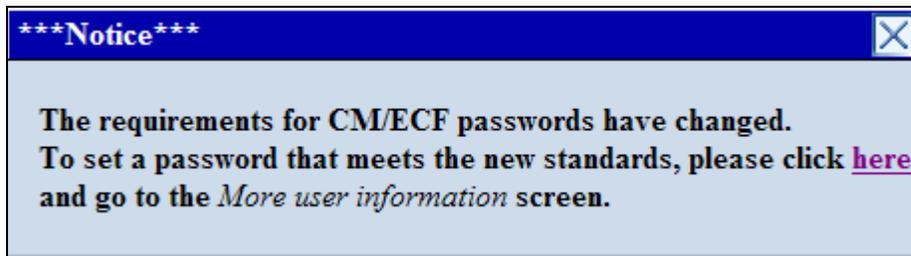
Click the link within the message to change your password.

- Mozilla Firefox 3.5 and Internet Explorer 8 do not allow users to type directly into a file name box on a document upload screen; instead, you may click the "Browse" button, then search for the document or type the file name in the resulting window.

- Lockout for Failure to Pay Fees

All fees associated with a filing are due at the time of filing. If you do not pay fees you have incurred, one or both of the following may occur, as determined by the court:

  ➢ You may receive email notification from the court, indicating that you have outstanding fees. This notification will include a hyperlink to allow you pay the fees immediately.

  ➢ You may be prevented from filing electronically in the court until you have paid all fees. The email notification described above includes details regarding when this will occur if fees remain unpaid. If prevented from filing, you may still log in to CM/ECF to pay fees. Once all fees are paid, your filing permissions are reinstated upon your next login.

- Corrections:

  ➢ When a name is displayed, the generation is not always included. Many such areas have been modified to include the generation display, in an effort to move toward including the generation consistently throughout the application.

  ➢ In some instances, you may have encountered an error message while trying to complete an internet payment, at which point the transaction was processed, but no receipt was generated. This problem no longer occurs.

  ➢ Under certain circumstances, an attorney PACER user was charged slightly more than a PACER-only user for viewing the same output. This has been corrected; all users with a PACER account are now charged the same amount.

  ➢ To avoid problems with pop-up blockers among various browsers, the pop-up window previously generated by a pay.gov transaction is now displayed as a panel. This panel

appears as a part of the original application window, so it is not affected by pop-up blocker settings.