

Administrative Office of the U.S. Courts

CM/ECF

Bankruptcy Release 4.1

Notes for PACER Users

January 2011

Bankruptcy Release 4.1

Introduction

This document summarizes the changes you may notice when you use CM/ECF in a U. S. Bankruptcy Court that has installed Release 4 of the application. Note that what you see in a particular court may be different from what is described here.

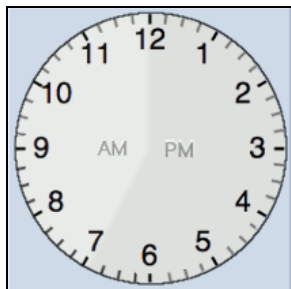
Internet Browsers

Release 4 was tested and works correctly with Firefox 3.5, and Internet Explorer 7 and 8; Mozilla Firefox 2 and Internet Explorer 6 are no longer supported.

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.

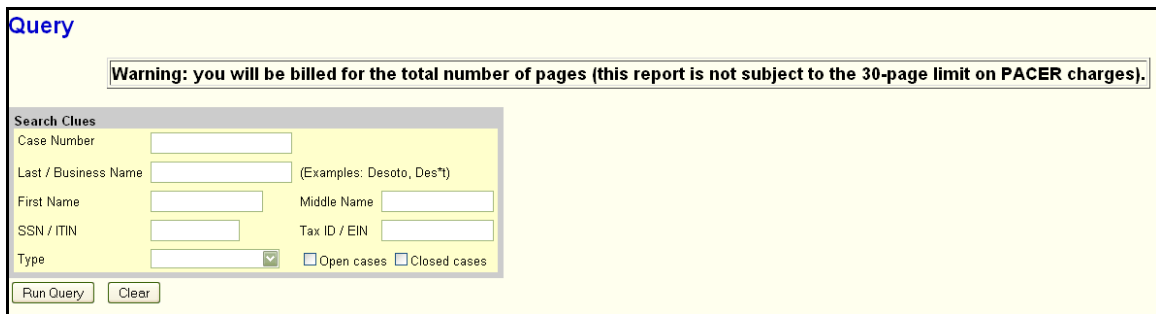
For each name result, a row of information is displayed to the screen for each case in which that person is involved, as shown below:

Select a Case						
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.



The screenshot shows a web interface titled "Query". At the top, a warning message in a yellow box states: "Warning: you will be billed for the total number of pages (this report is not subject to the 30-page limit on PACER charges)." Below the warning is a "Search Clues" section with several input fields: "Case Number", "Last / Business Name" (with examples "Desoto, Des*"), "First Name", "Middle Name", "SSN / ITIN", "Tax ID / EIN", and a "Type" dropdown menu. There are also checkboxes for "Open cases" and "Closed cases". At the bottom of the search section are "Run Query" and "Clear" buttons.

- 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 Andrew B. Korn and 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.
- 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

- 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.
- Previously, document hyperlinks did not change 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.