

Administrative Office of the U.S. Courts

CM/ECF

Bankruptcy Release 5.0/5.1

Notes for PACER Users

This document summarizes the changes you may notice when you use CM/ECF in a U. S. Bankruptcy Court that has installed Release 5.0/5.1 of the application.

Internet Browsers

Release 5.0/5.1 were tested and work correctly with Firefox and Internet Explorer 8 and 9.

Reports

Calendar Events

The hearing type selections have been changed so that 341 meetings may be excluded from the “All hearings” option if desired.

Because 341 meetings are handled differently from hearings, they are now separated out of the “All hearings” option. Instead, a new “341 meeting” selection allows viewing of these events. To view hearings and 341 meetings (the equivalent of the “All hearings” option in previous releases) select “All hearings” and “341 meetings” when running the report.

This change applies to all reports that allow a hearing type selection.

Cases

Split, Transferred and Reopened dates have been added to the selection screen, as well as several other new options.

In addition to options available on other reports, a new option allows users to search for cases without a confirmed plan that were filed within a date range. When searching by unconfirmed plan dates, the 31-day date range limit to PACER user searches does not apply.

CM/ECF now allows debtors and joint debtors to list multiple SSN/ITIN or Tax ID/EIN values. To accommodate this, the Cases Report **data-only option** lists multiple values, separated by commas, in field 42 (SSN/ITIN) and field 43 (Tax ID/EIN).

Claims Register

The “View multiple documents” option, previously only available for the Docket Report, is now also available in the Claims Register. When the option is selected, the report output will include a check box beside each claim document to which the user has access:



If a claim document includes attachments, the Document Selection Menu displays a list of the documents associated with the entry. As with the Docket Report, options to View All or Download All are now displayed on this screen when “View multiple documents” is selected.

If multiple documents are selected, all documents are presented to the user as one concatenated PDF document.

A new Claims Summary option displays a summary of all claims in a case that meet the selection criteria.

If the new “View claims summary report” box is checked on the claims register report screen, the following screen is displayed:

Claims Summary

[07-01000-NLW Johnson & Johnson Realty and Renaissance Marketing, Inc.](#) **Closed 07/01/2008, Debtor dis**

Type: bk Chapter: 11 Office: 3 (Trenton)
 Assets: Judge: NLW
 Date Filed: 01/04/2007 Last Date to File Claims: Last Date to File (Govt):
 Trustee:

Claim #	Amount claimed *	Date filed	Creditor number	Creditor name
1-2 View	19000.00	08/07/2007	505085946	Bank Of One
2-2 View	1110.00	01/15/2008	505093985	Citibank
3 View	710.00	05/10/2007	505085946	Bank Of One

Total Number of Claims: 3

Total Amount Claimed *	20820.00
Total Amount Allowed *	30886.00

* Includes general unsecured claims

The values are reflective of the data entered. Always refer to claim docu

	Claimed	Allowed
Secured	2777.00	6666.00
Priority	3388.00	9777.00

This summary screen lists the claims that match the search criteria in a table with the amount claimed for each. Hovering over a claim displays the breakdown of the claim amounts:

Claim #	Amount claimed *	Date filed	Creditor number	Creditor name
1-2 View	19000.00	08/07/2007	505085946	Bank Of One
2-2 View	1110.00	01/15/2008		
3 View	710.00	05/10/2007		
		Amount claimed: 19000.00		Amount allowed: 28000.00
		Secured claimed: 2000.00		Secured allowed: 6000.00
		Priority claimed: 3000.00		Priority allowed: 9000.00
		Unknown claimed: 4000.00		Unknown allowed: 8000.00
		Unsecured claimed: 10000.00		Unsecured allowed: 5000.00

Claims may be viewed individually by clicking the “View” button for the claim. Creditor/Claimant History is available by clicking on the creditor name. The table may be sorted by claim number, date filed or creditor name; to sort, click on the column header. Previously the Claims Register link displayed on the docket report did not display claims recorded in CM/ECF and filed prior to 1/1/2004.

List of Creditors (Creditor Mailing Matrix)

The title of the former “Creditor Mailing Matrix” menu item has been changed to “List of Creditors.”

The title of the former “Upload a creditor matrix file” menu item has been changed to “Upload list of creditors file.”

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.

The report selection criteria have been enhanced to include a time range filter. Users may now search for entries based on the date and time entered.



Type a time value or click the clock icon to select a time. If no times are entered, the entire day(s) are searched.

When a related document or attachment is referenced in the docket text of an event, the reference is now a hyperlink; this mirrors the functionality on the Docket Report.

Docket Report

Additional dates and deadlines now display on the Docket Report for easier monitoring of critical milestones in the case.

If the case has a date set for any of the following, the date is displayed on the public docket report for all users:

- 341 meeting (most current value displayed)
- Claims bar (pending proof of claim deadline, pending government proof of claim deadline)
- Plan confirmation
- 523 and 727 complaints deadline
- Financial management course deadline for the debtor (and for the joint debtor, if a deadline exists)

If there are claims associated with a case, a link to the Claims Register is displayed in the header along with the case information.

A new option allows users to view page counts for each PDF document on the report output.

A “Page counts for documents” check box now appears on the selection screen. The following image shows the addition to the selection screen.

Docket Sheet

Case number

Filed to

Entered

Documents to

Include:

- Terminated parties
- Page counts for documents

Document options:

- Include headers when displaying PDF documents
- View multiple documents

Format:

- HTML
- Text

Sort by

If the box is checked, the number of pages is displayed on the report output below the document number:

05/04/2005	7 (8 pgs, 8 docs)	Trans: if it is
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For documents with attachments, the number of documents is displayed as well as the total number of pages, as shown above; page numbers for each attachment are displayed on the Document Selection Menu, which is accessed by clicking the document number link.

Miscellaneous

As part of an ongoing effort to improve the user interface, a calendar icon has been added to many date fields in the application. Clicking the icon allows the user to select a date from a calendar, rather than typing the date manually. Additionally, several warning messages have been updated for consistency.

Previously, when a user uploaded a document using the Mozilla Firefox browser with version 4 or higher, the file upload dialog box displayed only "image" type files by default. To avoid

confusion and save time, this has been modified so that the “All Files” value is selected by default, rather than the “Image Files” value.

Multiple Identification Numbers

CM/ECF now allows up to five identification numbers for each debtor or joint debtor

Adding identification numbers

On screens where a new party may be added, if the party is a debtor or joint debtor, a plus icon appears beside the SSN/ITIN and Tax ID/EIN fields when they contain a value, as shown in the image below.



Debtor Information

Last name	<input type="text" value="Gren"/>	First name	<input type="text" value="Ronald"/>
Middle name	<input type="text"/>	Generation	<input type="text"/>
SSN/ITIN	<input type="text" value="999-99-9999"/>  999-99-9999	Tax Id/EIN	<input type="text" value="12-1234567"/>  12-1234567

Clicking this icon generates another field where a secondary SSN/ITIN or Tax ID/EIN value may be entered. Up to five identification numbers may be added in this way for each debtor or joint debtor.

Display of multiple identification numbers

For debtors with more than one identification number, all listed numbers are displayed and used throughout the application as follows:

- On public notices and dockets, only the last four digits of any SSN/ITIN are displayed.
- The Cases Report data-only option now displays multiple identification numbers as needed; see the Cases Report section for more information.

Case Opening

Opening a related case

A new option has been added to the Bankruptcy filing menu entitled, “Open a Related BK Case.” This option allows a related case number to be entered before opening the new case, and ensures that the related case is linked properly to the case being opened.

Claims/Creditors

During claim filing and creditor maintenance transactions, the final screen before submission now warns that submitting will finalize the transaction.

Docketing

Party/attorney associations

When an attorney files a document in a case in which he or she is not already involved, the user is prompted to indicate whether the attorney should be linked to the party and the case. Previously, the default behavior was not to link the attorney; now the association is made unless the user de-selects the check box that indicates an association. The wording has been updated to stress the implications of omitting a necessary association, as shown below.

IMPORTANT: The following attorney/party association(s) will be created in this case. De-selecting a party association will result in the filing attorney NOT receiving Notices of Electronic Filing for that party. If this is a joint filing, review the list carefully to ensure that only parties represented by the filing attorney are selected.

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Electronic Collection of the Claims Transfer Filing Fee

The Internet Payments Functionality in CM/ECF has been modified to allow for electronic collection of the new Claims Transfer Filing Fee, which is \$25.00 per claim transferred and goes into effect May 1, 2013. This allows internet payment-enabled filers to pay the Transfer Filing Fee using pay.gov. This modification includes support for claims upload.

Note: When the Claims Upload functionality is used to docket the Transfer of Claim the Submit button will be disabled if any error is found within the zip file during pre-processing.

Government Printing Office FDsys System

At its September 11, 2012 meeting, the Judicial Conference approved a program with the Government Printing Office (GPO) to provide court opinions via GPO's FDsys system. Opinions will be provided to the GPO by the U.S. Bankruptcy Court for the Western District of PA and included in the GPO's database automatically. Additional information may be found at the GPO program site:

<http://www.gpo.gov/fdsys/browse/collection.action?collectionCode=USCOURTS>

Mobile CM/ECF query access

As an enhancement to the PACER Case Locator (PCL), Bankruptcy 5.1 includes a limited query display optimized for mobile use. The PCL will now direct mobile device users to this new interface.

This limited interface allows searches by Case Number or Party Name, and text searches on docket entries in a single selected case. Outputs include Attorney, Party, Deadlines, and Docket Entries. A full site link allows users to access the standard CM/ECF site for any additional information.



Users are required to provide a PACER login as this application bills for information retrieval in the same manner as the main application query.

A new “Mobile Query” link is shown on the Query Screen allowing users to access this feature from within the application.

Query

Warning: you will be billed for the total number of pages (this report is not subject to the 30-page limit on PACER charges).

Search Clues
[Mobile Query](#)

Case Number	<input type="text"/>		
Last / Business Name	<input type="text"/>	(Examples: Desoto, Des*)	
First Name	<input type="text"/>	Middle Name	<input type="text"/>
SSN / ITIN	<input type="text"/>	Tax ID / EIN	<input type="text"/>
Type	<input type="text"/>	<input type="checkbox"/> Open cases	<input type="checkbox"/> Closed cases
Filed Date	<input type="text"/> to <input type="text"/>		
Last Entry Date	<input type="text"/> to <input type="text"/>		
Nature of Suit (AP and MP cases only)	<input type="text"/> <ul style="list-style-type: none"> 01 (Determination of Removed Claim or Cause; Rule 7001(10)) 02 (Other (e.g., other actions that would have been brought in state court if unrelated to a bankruptcy)) 11 (Recovery Money/Property [542 Turnover of Property; Rule 7001(1)]) 12 (Recovery Money/Property [547 Preference; Rule 7001(1)]) 		