Reports

Figure 1

Reports is one of the main menu items on the ECF banner menu. A PACER user can access the Cases, Claims Register, Docket Report, Calendar Events, Claims Activity, Creditor Mailing Matrix and Docket Activity via this option. The selection criteria for each of these reports are explained below but are also available on the Help screen that can be accessed by clicking on the yellow question mark on the banner menu. (**See Figure 1**).

IMPORTANT NOTE

Users are cautioned that reports that cover long periods of time could include dozens, if not hundreds, of pages. Because there is a per page charge for accessing reports and documents in ECF (*charged by PACER whether or not the user prints the report or document)*, a user is well advised to enter selection criteria carefully.

Cases

Displays cases filed, entered, discharged, dismissed, closed or converted.

STEP 1. Click on **Reports** from the Main Menu, then, click on **Cases** hyperlink. The selection criteria screen displays and allows the user to specify what information to include in the report.

TIP: User may leave the **Judge**, **Office**, **Case type**, **Trustee** or **Chapter** fields blank to search on all items that appear on those lists. To select two or more items listed for a field, press and hold the Control Key (Ctrl) while clicking on each item to be included from the list.

- **Date Type** - Several options are presented. User may select the date **Filed**, the date the case is **Entered** by the court or the **Discharged**, **Dismissed**, **Closed** or **Converted** dates by entering a beginning and an ending date in the desired field(s).

- **Open/Closed Cases** - Click in the box to remove or add a check to the applicable box.

- **Party Information** - Click in the box to have the report display party information such as address, tax ID, etc., if desired.

- **Sort by** - Allows three boxes in which to select the desired sort. Click the down arrow at the end of each box to choose from the list.

STEP 2. Click **Run Report** to continue or **Clear** to re-select criteria. Case Report screen displays.

STEP 3. To view case information, click on the case number hyperlink to access **Query** menu. (*Refer to preceding Query section of this manual for specific information on each query option*).

STEP 4. To print the report, click on the **Print** button or icon from the browser toolbar.

Claims Register

The Claims Register Report displays the claims filed for a specific case.

STEP 1. Click on **Reports** from the Main Menu, then, click on the **Claims Register** hyperlink. The selection criteria screen displays and allows the user to specify what information to include in the report.

STEP 2. Selection Criteria include:

- **Case number** - click in box and enter the correct case number (YY-NNNNN) format.

- **Creditor type** - leave blank, all creditors are uploaded to a case as creditor.

- **Creditor name** - leave blank to bring up all creditors who have filed a claim or click in the box and enter a specific creditor's name. (*User can enter only the first letter or*

the first few letters of the creditor's name to get the most thorough search. If user types the entire name, only exact matches will be displayed).

- **Claim number** leave blank to display all claims that fall within other search criteria or click inside the boxes and type specific claim numbers.

- **Filed** or **Entered** - will display either the filing date or the entered date, whichever is selected by clicking on the radio button.

- **Date Range** - if the default is accepted, the report will display all cases filed in the case. By entering dates in the beginning and ending fields, only claims entered or filed within a certain time frame will appear on the report.

- **Sort by** - Two sort criteria are offered. Click the down arrow to the right of the field and choose from the options on the list.

STEP 3. Click **Run Report** to continue or **Clear** to reset the search criteria. The **Claims Register** displays.

STEP 4. To print the register, click on **Print** button or icon from the browser toolbar.

STEP 5. To view a claim, click on the Claim number hyperlink. The PACER Service Center Transaction Receipt will appear reflecting the number of pages that will be billed to user's PACER account. Click **View Document** to accept charges and continue.

Docket Report Oldest Date First

The Docket Report allows the user to view and print a listing of all events docketed to a specific case. The default is Oldest Date First but the user has the option to switch the display order, as noted below in STEP 2.

STEP 1. Click on **Reports** from the Main Menu, then, click on the **Docket Report** hyperlink. The Selection Criteria screen displays and allows the user to specify what information to include in the report.

NOTE: The opportunity to review charges FIRST applies to PDF documents only. PACER charges apply if user runs ANY report.

STEP 2. The case number of the last case user accessed during the current ECF session displays automatically. Users can type another case number if they want to view the docket report for a different case using the YY-NNNNN format for bankruptcy cases and the YY-NNNN format for adversary proceedings. This is a required field.

- **Filed** or **Entered** option - To limit entries displayed to a date range, for best results select "filed" (when the document was filed) rather than "entered" (when the entry was recorded by the court in ECF) by clicking the radio button.

  After selecting the date type to be displayed, user may choose to enter a date range for the docket to display using the format MM/DD/YY or MM/DD/YYYY to limit the display.

  User can enter a start date with no end date, which will include all entries from the date specified onward, or user can enter an end date and no start date, which will include all entries up to the specified date.

  If no dates are entered, all entries will be selected. PACER charges apply to the number of pages displayed.

- **Documents** - Leave blank to display all documents or enter a beginning and ending number range to limit the display. This feature enables users to be charged only for the desired data on large cases.

- **Include terminated parties** - Click in the box to have the docket display include all parties including those who have been terminated from the case. Uncheck the box to show only current parties in the case.

- **Include links to the Notice of Electronic Filing** - Click in the box to have access to the notice of electronic filing for certain documents. The hyperlink back to a copy of the Notice of Electronic Filing that was created when the event was originally filed will show on the docket as a "silver ball" link. It will reflect those parties who are receiving electronic notifications in the case.

- **Sort by** - Click the down arrow to the right of the box to select how the docket is to be sorted. These options can affect the number of pages displayed and the PACER charges that apply. The options are: Oldest date first, Most recent date first, Document number ascending, and Document number descending.

STEP 3. Click **Run Report** to continue or **Clear** to reset all fields to their default values. The **Case Docket Sheet** screen displays.

> **TIP:** There is a scroll bar to the right of the screen which will move the docket sheet up or down.

STEP 4. To print the docket, click the **Print** button or icon on the browser toolbar.

STEP 5. To view a specific document, click on the document number hyperlink. The Pacer Service Center Transaction Receipt will appear reflecting the number of pages that will be billed to user's PACER account. If user chooses to accept the charges, click **View Document** to continue.

- ❑ After viewing the PDF document, either click on the ⇦**Back** icon of the internet browser's toolbar or close Acrobat Reader to return to the previously displayed screen.

> **NOTE:** **DO NOT** exit out of the document reader by using the **"X" button** at the top-right corner of the screen. This will immediately exit the user out of ECF.

STEP 6. To view the Notice of Electronic Filing, click on the silver ball next to the docket number hyperlink.

- ❑ Click the appropriate radio button to **Select Receipt Type**
- ❑ Click **Display Receipt** to continue or **Clear** to re-select receipt type.

STEP 7. The **Notice of Electronic Filing** screen displays.

- ❑ To print click **Print** button or icon on the browser toolbar.

Calendar Events

This report will provide a list of scheduled events on a single day. It allows selection by case number, judge, date or other criteria. It will also display related proceedings and provide hyperlinks to the documents giving rise to the proceedings.

STEP 1. Click on **Reports** on the ECF Main Menu, then, click on the **Calendar Events** hyperlink.

STEP 2. The Calendar Events screen displays. The following fields are available for selecting/entering criteria for generating the report:

> **TIP:** User may leave the **Case number**, **Judge**, and **Chapter** fields blank to include all items that appear on those lists. To select two or more items listed for a field, while holding down the Control Key (Ctrl) click on each item to be included from the list. To limit the report, click on the desired items. The default setting is for all.

- **Office** - Select one or more from the list.

- **Calendar events** - Select one or more types from the list. The default is All Hearings.

- **Date** - Enter the date in MM/DD/YY format, or click the Calendar button to select a date from a pop-up calendar.

- **Event subset** - If user selects "Check Events to Print on Report " or "Check Events to Omit from Report", the report that runs when user clicks **Run Report** will be an "Interim" report with check boxes in the lefthand column. Checking a box will select or omit that event from the report. User MUST click **Save Report** at the bottom of this screen when using one of these options, since the "Interim" report with check boxes does not get saved.

- **Select Report Headers** - Displays a screen for specifying optional header information which will be centered at the top of the report. Click **Continue** to close the box. This information is used for the report immediately generated, and is not saved.

- **Sort by** - The default sort for the report is by hearing time and case number. The "Office, Time" sort may be selected, but appointments which are not associated with a case or an office will be listed under the first office.

- **Select a Previously-Created Report** - Displays the reports which have previously been created and saved. A report is saved automatically, unless it is an "Interim Report" with check boxes. Only 3 reports are saved for a judge for a given report date. The oldest is deleted when another is produced. Reports are deleted when the calendar date has passed.

STEP 3. Click **Run Report** to continue or **Clear** to re-select criteria.

STEP 4. The **Calendar Event Report** displays.

STEP 5. To view case information, click on the case number hyperlink to get the Docket Sheet. User may change the sort or just click **Run Report.** (*Refer to preceding Docket Report section of this manual for specific information on the docket*).

STEP 6. Click on the ⇦**Back** icon on the browser toolbar to return to the report.

STEP 7. Clicking on the silver ball will bring up any related proceedings with hyperlinks to the documents giving rise to the proceedings.

> **TIP:** Be sure to click on the ⇦**Back** icon on the browser toolbar to return to the report. Clicking on the **"X" button** at the top of the screen will immediately exit user out of ECF.

STEP 8. To print the report, click on the **Print** button or icon from the browser toolbar.

Claims Activity

The Claims Activity Report lists information about claims along with links to any associated documents.

STEP 1. Click on **Reports** on the ECF Main Menu, then, click on the **Claims Activity** hyperlink.

STEP 2. The Claims Activity screen displays. The following fields are available for selecting/entering criteria for generating the report:

- **Case number** - To see claims for a particular case, enter a case number. To view claims in all cases, leave this field blank.
- **Office** - To limit claims by the office in which the case was filed, select one or more offices from the list. To view claims in both offices, leave this field blank.

- **Terminal digit(s)** - to limit claims for cases with case numbers ending in certain terminal digits, type a comma-separated list. Ranges of digits may also be specified (e.g., 12,23,51-50) or leave blank for all.

- User may leave the **Judge**, **Trustee**, **Chapter** and **Filer type** fields blank to search on all items that appear on those lists. To select two or more items listed for a field, press and hold the Control Key (Ctrl) while clicking on each item to be included from the list.

- **Entered by** - To limit claims by the person who entered them, enter the **last** name.

- **Creditor name** - To limit claims to those filed by a particular creditor, enter the name.

- **Entered Between** - To limit claims by the date on which they were filed, enter a date range.

- **Sort by** - Three levels of sorting are provided.

STEP 3. Click **Run Report** to continue or **Clear** to re-select criteria.

STEP 4. The Claims Activity Report displays.

- ❑ Click on the claim number hyperlink to view the proof of claim and any attached documentation.

- ❑ **Be sure to use the ⇦Back icon to return to the report.** If user clicks on the **X** at the top of the screen it will immediately exit user out of ECF.

STEP 5. To print, click on **Print** button or icon on the browser.

Creditor Mailing Matrix

This report displays the list of creditors for a specific case. The list contains those creditors uploaded at case opening and may or may not include parties that have filed/docketed a pleading to a case. All of the creditors on this report were added through the Creditor Maintenance Option of the ECF System and used by the Bankruptcy Noticing Center (BNC) for court generated notices.

STEP 1. Click on **Reports** from the Main Menu, then, click on **Creditor Mailing Matrix** hyperlink. The selection screen displays and allows the user to specify what information to include in the report and the format.

- **Case Number** - Enter Case number using the YY-XXXXX format.

- **Special Mailing Group** - Select "All" for all special mailing groups, or select specific group(s) to display the names and addresses of members.

  NOTE: if user selects any special mailing groups but there are none associated with this case, user will get the message "Sorry your requested case...does not have creditors" – meaning, creditors belonging to the specified groups. **Highlight ONLY the blank field to list all regular creditors**.

- **Format** - Select either a "1 column" format or a "raw data format" (pipe-delimited). The 1-column file can be saved as a text file on the computer with the "File/Save As" browser option. The saved file can then be edited and printed on labels.

STEP 2. Click **Run Report** to continue or **Clear** to re-select criteria.

Docket Activity

The Docket Activity Report lists selected events docketed to selected cases. The report may be limited by selecting from various options.

STEP 1. Click on **Reports** from the Main Menu, then, click on **Docket Activity** hyperlink. The selection screen displays and allows the user to specify what information to include on the report and the format.

- **Case Number** - To limit the activity to a specific case, enter the case number. If left blank, the report will include all cases that meet the other criteria.

- User may leave the **Judge**, **Office**, **Case type**, **Trustee**, **Chapter** or **Filer type** fields blank to search on all items that appear on those lists. To select two or more items listed for a field, press and hold the Control Key (Ctrl) while clicking on each item to be included from the list.

- To limit the report, select one or more from the lists of the following: **Judge**, **Office**, **Case type**, **Trustee**, **Chapter**, **Filer type**. Leaving the field blank will give ALL.

- **Category/Event** - Select one or more event categories from the category list, OR select one or more events from the event list.

- **Terminal digit(s)** - Enter the terminal digits of the cases to be included on the report. This can be separate digits or a range of digits (e.g., 12,23,51-59). If user selects by terminal digit, user should select sort option "Terminal Digit by bk#" so that activity in related adversary proceedings will appear after each bankruptcy case which has one of the specified digits.

- **Entered between** - Click this option and enter a date range (or change the default dates) to limit the docket entries by date of entry. The report will include only events entered on or between these dates.

- **Entered Today and not QC'd** - Select this option to show only docket entries which were entered today but have not been reviewed by Quality Control staff.

- **Summary Text/Full Docket Text** - Check the format of docket text user prefers to see.

- **Sort by** - Select the way the report should be sorted. If user specified terminal digit(s) for selection, select the "Terminal Digit by bk#" sort option so that activity in related adversary proceedings will appear after each bankruptcy case which has one of the specified digits.

STEP 2. Click **Run Report** to continue or **Clear** to re-select criteria.