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I. LOGIN AND PASSWORD

I.A. Obtaining a Login and Password

There are two databases available to ECF Participants:

- The **ECF Train** database is used to practice ECF in a safe environment and to complete any court required homework.

- The **ECF Live** database is used to file documents with the court.

Participants who attend training at the court office are issued a login and password to the ECF Train and ECF Live databases at the training session. Participants who do not attend training are issued a login and password to both databases via telephone. The ECF Live login is not activated until a participant has complied with court requirements to demonstrate their knowledge of ECF. Participants will be notified when their live account is activated.

I.B. Accessing the ECF System and Logging In

To get to the court's **ECF Train** database, go to:

www.orb.uscourts.gov/orb/ecf.nsf/ecftrng.htm

To get to the court's **ECF Live** database, go to:

www.orb.uscourts.gov/ecf

TIP: Before logging into the ECF Live or ECF Train database, read the screen for any important messages or updates.

Log in by entering your login and password in lower case. You do not need to enter a client code.

I.C. Linking PACER to ECF

You will need a PACER account in order to view docket reports, claims registers, creditor matrices, and other reports in ECF.

NOTE: **If you do not have a PACER account, apply for one at:**
www.pacer.psc.uscourts.gov

If you have a PACER account, link it to ECF as follows:

STEP 1 Click on the **Reports** category.

STEP 2 Select any menu option (e.g. Docket Report).

STEP 3 You will be presented with a PACER login screen.

- Enter your PACER login and password.
- Click **Make this my default PACER login**. In the future, you will not need to enter the PACER information in order to view a report.

To change your PACER account:

STEP 1 Click on the **Utilities** category.

STEP 2 Click on **Change Your PACER Login**.

STEP 3 Enter your new PACER login and password.

STEP 4 Click **Make this my default PACER login**.

I.D. Forgot Your ECF Login or Password?

Contact the ECF Help Desk (see www.orb.uscourts.gov/ecf for phone number).

I.E. Changing Your ECF Login or Password

Contact the ECF Help Desk (see www.orb.uscourts.gov/ecf for phone number).

II. AVOID PROBLEMS BY CLEARING YOUR CACHE

Pages you view on the Internet (including ECF screens and documents) are stored in temporary files for quick viewing. If these temporary files are not deleted on a regular basis, they can create problems including the opening of a second window within ECF when a menu option is selected, inability to use the backspace and delete keys, and old versions of updated documents being displayed. You can tell that you are having cache-related problems when one of the aforementioned problems occurs or when an ECF menu category (e.g., Bankruptcy) remains outlined even though you have selected another menu category (e.g., Reports). Therefore, it is recommended that you regularly clear your Internet browser cache and the temporary storage area on your hard drive. You may want to confer with your information technology resource person about the best way to accomplish this.

II.A. Clearing your cache in Internet Explorer

STEP 1 On the menu bar at the top of the screen, click **Tools** and select **Internet Options**.

STEP 2 On the **General** tab, click on **Delete Files**.

[**NOTE:** You are only deleting TEMPORARY FILES of the pages you have viewed using the browser!]

STEP 3 Click **OK**.

II.B. Clearing your cache in Netscape Navigator

STEP 1 On the menu bar at the top of the screen, click **Edit** and select **Preferences**.

STEP 2 Click **Advanced**.

STEP 3 Click **Cache**.

STEP 4 Click **Clear Memory Cache**.

STEP 5 Click **OK**.

III. NAVIGATION

Use your mouse or <Tab> to move from field to field. To go back a field, use your mouse or <Shift><Tab>.

When filing a document, use the *[Back]* button cautiously. In certain situations, *[Back]* will let you go back one or more screens to correct information. When you go forward again, you must re-enter any required information (ECF will not "remember" it). In other situations, using *[Back]* will result in a white screen and a warning; in these situations, try clicking *[Back]* again.

When viewing a document from ECF, always use *[Back]* to return to ECF. Clicking on a heading (Bankruptcy, Adversary, etc.) from the document display screen will introduce navigation problems, including the opening of an extra window and problems with the <backspace> and <delete> keys. If these problems begin to occur, clean your cache as described in Section II above.

IV. CONVERTING A DOCUMENT TO PDF

All documents other than creditor matrices filed in ECF are required to be in PDF (Portable Document Format). Any document created by the filer must be a text-based PDF, as opposed to an image (scanned) PDF. For a typical document, its text-based PDF version would be 20% of the size of its imaged version, and the imaged version would take 10 times longer to transfer. Text-based PDF documents are searchable and retain the formatting (pages, fonts, etc.) of the original document.

IV.A. Converting Word Processing Documents to PDF

To convert a document to PDF, you must have installed the full version of Adobe Acrobat with the additional Acrobat PDFWriter driver. Then do the following:

STEP 1 Create the document in a word processing program (for example, Word or WordPerfect).

STEP 2 From your word processing software, click **File** and select **Print**. The **Print Dialog** box displays.

STEP 3 In the printer name field, select **Adobe PDFWriter**.

- In Word, click **OK**.
- In WordPerfect, click **Print**.

STEP 4 The **Save PDF File As** dialog box displays.

- In the **Save In** box, select a drive and folder in which you will place the newly created PDF document.

- In the **File Name** box, type the name of the document. Be sure to keep the ".pdf" extension in the file name.

- Click **Save**.

STEP 5 If you wish to view the PDF, open Adobe Acrobat, click File, and select Open. You may also save your document in the word processing software before or after converting to PDF.

IV.B. Breaking a Large PDF into Smaller Documents

Any document which is larger than 4 MB (4000 KB) must be broken into smaller chunks and filed as a primary document with attachments.

- To determine the size of your document, while you have the document displayed in Adobe Acrobat, click on **File** and **Document Properties** or press **<Ctrl><D>.**

- To break a document into smaller segments, simply follow the procedure for converting to PDF, making sure that the print range is set to "Pages:" and then entering the page number range (e.g., 1-15, 16-30, etc.). Be sure to give each section of the document a different name (e.g., petition1.pdf, petition2.pdf, etc.)

IV.C. Combining PDF's into One Document

If you have Acrobat version 5 or higher, you can combine multiple PDF's as follows, as long as the resulting document does not exceed 4 MB (4000 KB):

STEP 1 In Adobe Acrobat, open the PDF document which will be at the beginning of the new combined document.

STEP 2 Click on **Document-Insert Pages** (version 5) or **Document-Pages-Insert** (version 6).

STEP 3 Select the PDF file which you want to append and click **Select**.

STEP 4 The **Insert Pages** box displays.

- In the **Location** field, choose **After**.

- In the **Page** section, select **Last**.

- Click **OK**.

V. FILING A DOCUMENT IN ECF

V.A. Finding the Correct Menu Item for the Document to Be Filed

ECF is organized as follows:

- The major Headings, which appear across the top banner at all times, are **Bankruptcy**, **Adversary**, **Reports**, **Query**, **Utilities**, and **Logout**.

- Within each heading, there are several Categories. For example, under the Bankruptcy Heading, some of the categories are **Answer/Response**, **File Claims, Motions/Applications** and **Open a BK Case**.

- After selecting the correct Heading and Category and entering a case number, you will often be presented with a list of Events. For example, under Motions/Applications, some of the Events are **Avoid Lien**, **Relief from Stay**, and **Reopen Case**.

TIP: To move quickly to a particular item in a pick list, type the first letter to move to the beginning of the items which begin with that letter, then continue to type the first letter to scroll through the list.

TIP: To find the Heading, Category, and Document menu item for a particular type of document or action, consult the appropriate Document Chart at: www.orb.uscourts.gov/orb/ecf.nsf/ecftrng.htm

V.B. Entering the Case Number

All case numbers are entered in the following format:

- YY-NNNNN for Bankruptcy cases

  Examples: 03-39582, 04-60187

- YY-NNNN for Adversary Proceeding cases

  Examples: 04-3157, 02-6294

After the case number is entered, ECF will present the case number along with the case name. **Always confirm the case name is correct before proceeding**.

V.C. Selecting the Party

The **Select the Party** screen prompts you for the party filing the document. If you are an attorney, you will usually select your client. If you are a trustee, you will usually select yourself unless you are filing an Application for Compensation on behalf of another professional.

If the party filing the document is listed on this screen, click on the party's name in the list and click **Next**.

If the individual or entity filing the document is not a party to the case, you will need to add them as follows:

STEP 1 Click **Add/Create New Party**.

STEP 2 Enter the appropriate information in the **Last/Business Name** field and click **Search**.

> **TIP:** When searching for a party, you may use asterisks as wildcards in positions other than the first position. For example, to find ABC Corp, you may enter AB*, ABC*, etc.

- If a matching party is found, one or more Party Search Results will display. If one of them is an exact match, click on the name and click **Select from List**.
- If no exact matches are found, click **Add/Create New Party**.

STEP 3 The **Party Information** screen displays.

> **TIP:** Do NOT add an address if the party is represented by an attorney.

STEP 4 Change the **Pro Se** designation if incorrect.

STEP 5 Change the **Role** to the correct option.

STEP 6 Click **Submit**.

STEP 7 The **Select the Party** screen displays. Click on the party's name in the list and click **Next**.

V.D. Referencing an Existing Event

When filing a document such as an objection, response, answer, hearing notice, certificate of service, or affidavit, you are required to associate your document with the underlying motion or document to which it is related. For example, a Response and Notice of Hearing must be associated with the Motion for Relief from Stay. This allows anyone reading the docket to easily ascertain the connections between documents and to access related documents without searching the entire docket. It also results in the documents related to a hearing to be quickly accessed on the Calendar Events Report.

To associate a document you are filing with a previously filed document:

STEP 1 Click to select **Refer to existing event(s)?** and click **Next**.

STEP 2 Follow the instruction to *Select the category to which your event relates* by choosing the filing category in which the related document was filed. To select more than one, hold down the <Ctrl> key and click on the desired items.

Example 1. You are filing a response to a motion. You choose the category **motion**.

Example 2. You are filing an answer to a complaint. You choose the category **cmp** (complaint).

Example 3. You are filing an objection to a trustee's notice. You choose the category **notice**.

Q To narrow the range of documents (motions, notices, etc.) which will be displayed, you may enter dates in **Filed _____ to _____**.

Q To narrow the range of documents (motions, notices, etc.) which will be displayed, you may enter document numbers in **Documents _____ to _____**.

- Click **Next**.

STEP 3 Follow the instruction to *Select the appropriate event(s) to which your event relates* by choosing the document to which the document you are filing relates. Click **Next**.

V.E. Attaching the Document to be Filed

This screen instructs you to select the PDF document to be filed.

STEP 1 Click the **Browse** button. A **Choose File** box will .

- In the **Files of Type:** field at the bottom of the box, make sure that **All Files** is selected. If not, click the down arrow on the right side and click on **All Files**.

- In the **Look In:** field at the top of the box, click the down arrow on the right side and click on the correct drive and/or folder if necessary.

- You may need to open additional folders to get to the correct document. To open a folder displayed in the box, you can either double click on it, or single click on it and click **Open**.

- When you have located the correct document, right click on it and click **Open**. This will paste the name in the filename box, and also display the document in a new window.

- After verifying the document is correct, click the X in the top right corner of the window to close it. You will return to the **Choose File** box.

- Click **Open** to close the **Choose File** box and paste the document into the ECF filename window.

STEP 2 If there are no attachments to the document, click **Next**.

STEP 3 If there are attachments to the filed document, click **Yes**.

- Repeat the instructions in Step 1 to find and paste the document attachment.

- Either select a **Type** from the dropdown menu or type a **Description**.
- Click **Add to List**.
- If there are additional attachments, repeat the instructions in Step 3.
- Click **Next**.

V.F. Reviewing the Final Docket Text

On the **Docket Text: Modify as Appropriate** and **Final Docket Text** screens, you are presented with the final text which will appear on the docket. There may be a dropdown box in which you may select clarifying text such as **First Amended**, **Ex Parte**, etc. Read the docket text carefully to ensure that you have made the correct choices as to the document to be filed, the party filer, etc. At this point, the document is not yet filed and you have an opportunity to correct your error without the intervention of the court. If you notice that the docket text is incorrect, take one of the following actions:

OPTION 1 If the docket text is incorrect because you chose the wrong menu item, simply click the appropriate heading (Bankruptcy, Adversary) and start the electronic filing process over again.

OPTION 2 If you chose the correct menu item but the docket text is incorrect because you made an incorrect selection as you went through the screens, you can try clicking **Back** at the top left of your browser. If you get the **Action canceled** screen, you can try clicking **Back** one more time. Alternatively, you can click the appropriate heading (Bankruptcy, Adversary) and start the electronic filing process over again.

NOTE: If you notice an error AFTER you have proceeded past the Final Docket Text screen, you will need to contact the ECF Help Desk (see www.orb.uscourts.gov/ecf for phone number).

V.G. Understanding the Notice of Electronic Filing

The Notice of Electronic Filing (NEF) confirms that the document was filed. It shows the following information:

- **Q** The exact date and time the document was filed.
- **Q** The case name, case number, and document number.

> **TIP:** Clicking on the hyperlink for the case number will prompt you for your PACER login and password, then take you to the Docket Report screen. Clicking on the hyperlink for the document number will prompt you for your PACER login and password, then display the document.

- **Q** The docket text.
- **Q** The other parties in the case to whom notice will be electronically sent.
- **Q** The other parties in the case to whom notice will not be electronically sent, and therefore may need to be served via mail or other means.

You may wish to print the NEF and save it for your records; however, note that the NEF is always available to you from the Docket Report by clicking on the silver ball next to the document number.

> **TIP:** A batch event produces only one NEF for all cases. When reviewing the parties and how they are served, pay close attention to the case number listed directly above the parties' names.

VI. PAYING FILING FEES WITH THE INTERNET CREDIT CARD PROGRAM

All ECF participants who owe fees to the court are required to pay them using the Internet credit card program on the day the associated case or document is filed. In order for you to access the Internet credit card program, your software must not disable pop-up windows. At the end of a filing for which a fee is due, an Electronic Payment window displays. If you are going to file further documents requiring fees that same day and wish to pay all fees for the day in one transaction, you may click **Continue Filing**.

VI.A. Paying Fees

You may access the Electronic Payment window either by filing a case or document requiring a filing fee, or by selecting **Utilities** and **Internet Payments Due**. It displays a summary of current charges, including the date incurred, the description (i.e., document filed), amount, and total due.

STEP 1 Click **Pay Now**. It may take a few moments for the next screen to appear.

STEP 2 The **Enter Payment** screen displays.

NOTE: If your name or address is incorrect, contact the ECF Help Desk (see www.orb.uscourts.gov/ecf for phone number).

- **Card Type:** Select the proper card.
- **Card Number:** Enter your credit card number without hyphens.
- **Expiration Date:** Select the month and enter the year in which your credit card expires.
- **Payment Amount:** This defaults to the amount owed to the court.
- Click **Continue**.

STEP 3 The **Payment Summary and Authorization** screen displays.

- Review the information at the top of the screen to ensure that it is correct. If you have made an error, click **Edit** and make the appropriate changes. Do NOT use the *[Back]* button as it may result in a double payment! If you do so, finish the transaction and contact the ECF Help Desk (see www.orb.uscourts.gov/ecf for phone number) immediately.
- In the **Authorization** section, click on the box.
- If you wish to receive a confirmation e-mail, enter and re-enter your e-mail address.
- Click **Make Payment**.

STEP 4 A confirmation screen displays with a transaction number.

- If desired, click the **print a copy of** hyperlink to print a copy of the receipt.

- Click **Close Window**.

VI.B. Consequences of Nonpayment

ECF participants who do not pay their credit card charges on the day of filing will have their electronic filing privileges suspended until they pay. In addition, the case or proceeding for which the fee is due may be dismissed. Repeated instances of failure to pay timely will result in permanent revocation of ECF filing privileges.

VII. SERVING OTHER PARTIES

As noted in the discussion of the Notice of Electronic Filing (NEF) above, the NEF displays which parties are served electronically through ECF and which must be served by non-electronic means. All ECF participants consent to be served electronically through ECF and need not be served in any other way.

To view the status of other parties prior to filing, proceed as follows:

STEP 1 Click on **Query** on the ECF Main Menu Bar.

STEP 2 The **Search Clues** screen displays.

- Insert the case number using the YY-NNNNN format.

- Click on **Run Query**.

STEP 3 Select **Party**.

STEP 4 A list of parties and their attorneys displays. Any parties or attorneys with e-mail addresses will be served electronically through ECF.