

Electronic Case Filing (ECF)



Creditor/Claimant Manual
for Attorneys/Non-Attorneys

United States Bankruptcy Court
District of Oregon

January, 2014

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General Information

For any issues related to the accessing and use of the ECF application, case specific questions and all general information, please contact the court at www.orb.uscourts.gov

A **Public Access to Court Electronic Records (PACER)** account is required to view case files over the Internet. Register online at <http://pacer.gov>, or call 1-800-676-6856 to establish an account.

Non-Attorney Filers: Free Electronic Bankruptcy Noticing (EBN) is available through the Bankruptcy Noticing Center at www.ebn.uscourts.gov/fast. Some of the benefits of EBN are:

- Notices received the same day they are issued, 24/7.
- Allows timely representation of your interests.
- Virtually eliminates the risk of not receiving a notice or losing it once received.

Using a Browser to Log On to Electronic Case Files (ECF)

The following instructions will guide you in the basic use of a browser to log on to the ECF system.

- STEP 1.** On your PC desktop, access Internet Explorer by clicking on the icon.
- STEP 2.** The **Internet Explorer** screen displays.
- Enter the URL for the Court's website:
 - www.orb.uscourts.gov
- STEP 3.** The Court's website displays. Always log on to ECF through the Court's website.
- Under the ECF banner, click on the hyperlink ecf.orb.uscourts.gov to access ECF.
- STEP 4.** The **Welcome to the U.S. Bankruptcy Court for the District of Oregon** page displays.
- Click on the ECF or PACER Login hyperlink.
- STEP 5.** The **ECF/PACER Login** screen displays.
- Enter your ECF login and password to file documents.

OR

- Enter your PACER login and password to view electronic case files.
- Check the redaction box.

NOTE: If you have forgotten your ECF or PACER password, the ECF login page has a link to help you reset a lost ECF or PACER password. You must know your ECF login or the email associated with your ECF user account. The link to reset your password will be emailed to you.

- STEP 6.** The ECF Menu Bar displays.
- ECF is organized by headings, categories and events. In the blue banner are the headings: Bankruptcy, Adversary, Query, Reports, Utilities, Search and Logout.

- If you click on each heading, the categories available to Creditor/Claimant e-filers will display. By clicking on the category, the events available in the category will display.
- The procedures included in this manual will reference which heading, category and event to use to electronically file documents.

STEP 7. To **LOGOUT** of the ECF System:

- Click on the Logout button on the Menu Bar.
- To close the browser, click the X in the top right corner of the ECF/PACER Login screen.

ECF Filing Tips

GENERAL

- Per LBR 9011-4, signatures must be denoted on electronically filed documents using “/s/ Name”.
- Per the Administrative Procedures, Pt. III.A.2., all e-filed documents must be in text-based pdf (i.e., not scanned) unless the filer did not create them.

SERVICE

Attorney Filers:

- Per LBR 5005-4(d), ECF registered participants waive the right to receive first class mail and consent to receive e-mail service through ECF, except for service of a summons and complaint in an adversary proceeding under FRBP 7004 or a subpoena under 9016.
- Parties get “one free look” at a document received from the ECF system.

Attorney Filers and Non/Attorney Filers:

- To determine what parties in a case may be served via e-mail, click on Utilities from the ECF Main Menu, click on Mailings, click Mailing Info for a Case, enter the Case Number and click Submit. The Electronic Mail List will display listing the parties who will receive electronic notice/service in the case.
- Per LBR 2002-1(i), creditors may register preferred e-mail addresses with the National Creditor Registration Service. They may request to override the preferred address in an individual case by filing a request with the court using the event **Notice of Override of Preferred Address §342(e)**. E-filers may access creditors’ preferred addresses by selecting **List of Creditors** in the **Mailings** category under the **Utilities** heading.

TECHNICAL ISSUES

- To change your password, click on **Utilities, Your Account, Change Your Password**.
- If you have forgotten your ECF or PACER password, the ECF login page has a link to help you reset a lost ECF or PACER password. You must know your ECF login or the email associated with your ECF user account. The link to reset your password will be emailed to you.
- To change your e-mail address, e-mail setup, or mailing address, click on **Utilities, Your Account, Maintain Your ECF Account**.
- You must use Adobe Acrobat 8.0 and higher to ensure success with the court’s local bankruptcy forms (LBF’s) in fillable pdf format.
- Please contact the court if you believe you have made an error.

Special Notice Request

Use this event only if you want to add yourself as a party to the case for the purpose of receiving copies of documents served on all parties. If you are an attorney who is now representing a pro se party in the case, use the Notice of Appearance event in the Notice or Creditor Claimant Entries category.

This event is a text only event. A document need not be prepared and filed with the court. Upon completion of this event, your Special Notice Request will appear on the docket and be fully processed by the court .

- STEP 1.** Click on **Bankruptcy** on the ECF Main Menu Bar.
- STEP 2.** Click on **Creditor Claimant Batch**.
- STEP 3.** The **Case Number** screen displays.
- Insert the case number(s) using the YY-NNNNN format.
 - Click **Next**.
- STEP 4.** Confirm the debtor(s) name and case number(s) are correct.
- Select **Special Notice Request** from the event list.
 - Click **Next**. If you are an **Attorney** filer, continue with **STEP 6**.
- STEP 5.** **Non-Attorney** filer: The **Select any additional attorney(s)** screen displays.
- Do not select any attorney from the following list. The list does not apply in this event. Click the next button to continue without making a selection.**
 - Click **Next**.
 - A pop-up dialogue box displays with **Note: you have not selected an attorney**.
 - Click **OK**.

- STEP 6.** The **Select the Party:** screen displays.
- Select **Add/Create New Party** EVEN IF the party appears in the Party list.
 - A **Search for a party** screen displays.
 - Enter the name of the creditor in the **Last/Business name** field. Refer to the [Style Guide](#) for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
 - Click **Search**.
 - If the creditor is **not listed**, or you see **Party search results** and **No person found**, click on “**Create new party**”.
 - The **Party Information** screen displays. The creditor’s name will appear in the Last Name field.
 - Address Information:
 - Attorney Filer:** Do **not** add an address.
 - Non-Attorney Filer:** Enter creditor’s address. Refer to the [Style Guide](#) for naming conventions and accepted abbreviations.
 - At the **Role** field, change the role type to **Creditor**.
 - Click **Submit** and continue with **STEP 7**.
 - If the creditor **is** in the database, a list will display.
 - If the creditor is listed with an address (the name and address must be an **exact match** and in line with the [Style Guide](#) requirements for entry of names and addresses), click **Select name from list**. If there is NOT a record with an exact address match, click on “**Create new party**” and follow procedures above.
 - The **Party Information** screen displays.
 - At the **Role** drop-down list, select **Creditor** as the Role type.

- Click **Submit**.
- STEP 7.** The **Select the Party:** screen displays.
- The creditor added is highlighted.
 - Click **Next**. If you are a **Non-Attorney** filer, continue with **STEP 9**.
- STEP 8.** **Attorneys:** If you have not previously filed a pleading in this case on behalf of the party you represent, a screen displays with the following message:
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.
- Confirm the box is checked for the party you represent.
 - Click **Next**.
- STEP 9.** A case verification screen displays, along with reminder messages that this event is **text-only** (i.e., you will not have a pdf file to attach), and not to be confused with the **Notice of Appearance** event (also **text-only**).
- Click **Next**.
- STEP 10.** A second case verification screen displays, along with reminder message that it is the filer's responsibility to ensure the party and/or attorney were added in all applicable cases.
- Click **Next**.
- STEP 11.** A third case verification screen displays.
- Click **Next**.
- STEP 12.** The **Docket Text: Final Text** screen displays.
- Confirm the docket text is correct.
 - Click **Next**.

STEP 13. The **Notice of Electronic Filing** screen displays.

Change of Address for Payments and/or Notices

- STEP 1.** Click on **Bankruptcy** on the ECF Main Menu Bar.
- STEP 2.** Click on **Creditor Claimant Entries**.
- STEP 3.** The **Case Number** screen displays.
- Enter the case number in YY-NNNNN format.
 - Click **Next**.
- STEP 4.** Select **Change of Address** from the event list.
- Click **Next**.
- STEP 5.** The **Select the Party:** screen displays.
- If the creditor is already a party to the case:
 - Attorney** filer: select the party, click **Next** and continue with **STEP 7**.
 - Non-Attorney** filer: select the party, click **Next** and continue with **STEP 8**.
 - If the creditor is **not** a party to the case, click on **Add/Create New Party**.
 - A **Search for a party** screen displays.
 - Enter the name of the creditor in the **Last/Business name** field. Refer to the [Style Guide](#) for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
 - Click **Search**.
 - If the creditor is **not** listed, or you see **Party search results** and **No person found**, click on “**Create new party**”.

- The **Party Information** screen displays. The creditor's name will appear in the Last Name field.
 - Enter the new address. Refer to the [Style Guide](#) for naming conventions and accepted abbreviations. At the **Role** field, change the role type to **Creditor**.
 - Click **Submit** and continue with **STEP 6**.
 - If the creditor **is** in the database, a list will display.
 - If the creditor is listed with the **new** address, click **Select name from list**. If there is NOT a record with an exact address match, click on “**Create new party**” and follow procedures above.
 - The **Party Information** screen displays.
 - At the **Role** drop-down list, select **Creditor** as the Role type.
 - Click **Submit**.
- STEP 6.** The **Party Selection** screen displays.
- The creditor added is highlighted.
 - Click **Next**. If you are a **Non-Attorney** filer, continue with **STEP 8**.
- STEP 7.** **Attorneys:** If you have not previously filed a pleading in this case on behalf of the party you represent, a screen displays with the following message:
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.
- Confirm the box is checked for the party you represent.
 - Click **Next**.
- STEP 8.** A case verification screen displays with a reminder message: **Use LBF #101C for a creditor change of address.**

- Click **Next**.
- STEP 9.** At **Have you filed a proof of claim?**, select **Yes** or **No**.
- If **Yes**, click **Next** and continue with **STEP 10**.
 - If **No**, click **Next** and continue with **STEP 12**.
- STEP 10.** At **Select the radio button that describes your filing:**, select the appropriate radio button.
- Click **Next**.
- STEP 11.** The **Select claim(s) from list** screen displays.
- Click on the appropriate claim(s) from the list. The claim number(s) of the claim(s) selected will populate the **Claims Selected:** field.
 - Click **Next**.
- STEP 12.** At **Enter the name(s) of the person or entity whose address has changed** field, enter the name(s) of the person(s) or entity whose address has changed.
- Click **Next**.
- STEP 13.** Click **Browse** to select the appropriate PDF to attach.
- Click **Next**.
- STEP 14.** The **Docket Text: Modify as Appropriate** screen displays.
- If appropriate, use the drop-down list, and then click **Next**.
- STEP 15.** The **Docket Text: Final Text** screen displays.
- Confirm the docket text is correct.
 - Click **Next**.
- STEP 16.** The **Notice of Electronic Filing** screen displays.

Notice of Appearance/Representation

Use this event **only** if you are an **attorney** that is now appearing for a pro se party in this case, or you are appearing as co-counsel for an already represented party. Otherwise use the event Special Notice Request in the Miscellaneous or Creditor Claimant Batch category.

This event is now text-only. A document need not be prepared **and must not be** filed with the court. Upon completion of this event, your Notice of Appearance will appear on the docket and be fully processed by the court.

- STEP 1.** Click on **Bankruptcy** on the ECF Main Menu Bar.
- STEP 2.** Click on **Creditor Claimant Entries**.
- STEP 3.** The **Case Number** screen displays.
- Insert the case number using the YY-NNNNN format.
 - Click **Next**.
- STEP 4.** Select **Notice of Appearance/Representation** from the event list.
- Click **Next**.
- STEP 5.** The **Select the Party:** screen displays.
- If the creditor is already a party to the case, select and continue with **STEP 7** below. If the creditor is **not** a party to the case, click on **Add/Create New Party**.
 - A **Search for a party** screen displays.
 - Enter the name of the party in the **Last/Business name** field. Refer to the [Style Guide](#) for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
 - Click **Search**.

- If the creditor is **not listed**, or you see **Party search results** and **No person found**, click on “**Create new party**”.
- The **Party Information** screen displays. The creditor’s name will appear in the Last name field. Do **not** enter an address for the party, as they are represented by you. Proceed to the **Role** field and select **Creditor** as the Role type.
- Click **Submit** and continue with **STEP 6**.
- If the creditor **is** in the database, a list will display.
 - If the creditor is listed with an address (the name and address must be an **exact match** and in line with the **Style Guide** requirements for entry of names and addresses), click **Select name from list**. If there is NOT a record with an exact address match, click on “**Create new party**” and follow procedures above.
 - On the **Party Information** screen, click on the **Role** drop-down list and select **Creditor** as the Role type.
 - Click **Submit**.

STEP 6. The **Select the Party:** screen displays.

- The creditor added is highlighted.
- Click **Next**.

STEP 7. If you have not previously filed a pleading in this case on behalf of the party you represent, a screen displays with the following message: **IMPORTANT: The following attorney/party association(s) will be created in this case. Deselecting 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.**

- Confirm the box is checked for the party you represent.
- Click **Next**.

- STEP 8.** A case verification screen displays, along with reminder messages that this event is now **text-only** (i.e., you will not have a pdf file to attach), and not to be confused with the **Special Notice Request** event (also **text-only**).
- Click **Next**.
- STEP 9.** A second case verification screen displays along with additional reminder messages. Please note it is the filer's responsibility to ensure the party and/or attorney were added in all applicable cases.
- Click **Next**.
- STEP 10.** The **Docket Text: Modify as Appropriate** screen displays.
- If appropriate, use the drop-down list, and then click **Next**.
- STEP 11.** The **Docket Text: Final Text** screen displays.
- Confirm the docket text is correct.
 - Click **Next**.
- STEP 12.** The **Notice of Electronic Filing** screen displays.

Notice of Mortgage Payment Change (Claim Filed)

- STEP 1. Click on **Bankruptcy** on the ECF Main Menu Bar.
- STEP 2. Click on **Creditor Claimant Entries**.
- STEP 3. The **Case Number** screen displays.
- Insert the Case Number in the **YY-NNNNN** format.
 - Click **Next**.
- STEP 4. Select **Notice of Mortgage Payment Change** from the event list.
- Click **Next**.
- STEP 5. The **Select the Party:** screen displays.
- If the creditor is already a party to the case:
 - Attorney** filer: select the party, click **Next** and continue with **STEP 7**.
 - Non-Attorney** filer: select the party, click **Next** and continue with **STEP 8**.
 - If the creditor is **not** a party to the case, click on **Add/Create New Party**.
 - A **Search for a party** screen displays.
 - Enter the name of the creditor in the **Last/Business name** field. Refer to the [Style Guide](#) for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
 - Click **Search**.
 - If the creditor is **not listed**, or you see **Party search results** and **No person found**, click on **“Create New Party”**.

- The **Party Information** screen displays. The creditor's name will appear in the Last Name field.
 - Address Information:
 - Attorney Filer:** Do **not** add an address.
 - Non-Attorney Filer:** Enter creditor's address. Refer to the [Style Guide](#) for naming conventions and accepted abbreviations.
 - At the **Role** field, change the role type to **Creditor**.
 - Click **Submit** and continue with **STEP 6**.
 - If the creditor **is** in the database, a list will display.
 - If the creditor is listed with an address that matches what was on the original claim, click **Select name from list**. If there is **NOT** a record with an exact address match, click on "**Create new party**" and follow procedures above.
 - The **Party Information** screen displays.
 - At the **Role** drop-down list, select **Creditor** as the Role type.
 - Click **Submit**.
- STEP 6.** The **Select the Party:** screen displays.
- The creditor added is highlighted.
 - Click **Next**. If you are a **Non-Attorney** filer, continue with **STEP 8**.
- STEP 7.** If you have not previously filed a pleading in this case on behalf of the party you represent, a screen displays with the following message: **IMPORTANT: The following attorney/party association(s) will be created in this case. Deselecting 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.**
- Confirm the box is checked for the party you represent.

- Click **Next**.

STEP 8. A message screen displays: **Is this notice being filed pursuant to Bankruptcy Rule 3002.1(b), where a corresponding Proof of Claim has NOT been filed?**

- If a proof of claim has **NOT** been previously filed, select **Yes** and use the event, **Notice of Mortgage Payment Change (NO PROOF OF CLAIM FILED)**.
- If a proof of claim has previously been filed, select **No**.
- Click **Next**.

STEP 9. Click on **Browse** to select the appropriate PDF to attach.

- Click **Next**.

STEP 10. The **Select claim(s) from list** screen displays.

- Click on the appropriate claim. The claim number will populate the **Claims Selected** field.
- Click **Next**.

STEP 11. A message screen displays: **Is a Certificate of Service included or attached to the document currently being filed?**

- Select **Yes** if a certificate of service is attached; or select **No** if a certificate of service is not attached.
- Click **Next**.

STEP 12. A case confirmation screen displays.

- Click **Next**.

STEP 13. The **Docket Text: Final Text** screen displays.

- Confirm the docket text is correct.
- Click **Next**.

STEP 14. The **Notice of Electronic Filing** screen displays.

NOTE: This event will not display on the docket report. The event does display on the claims register for the affected claim.

Notice of Mortgage Payment Change (NO PROOF OF CLAIM FILED)

- STEP 1.** Click on **Bankruptcy** on the ECF Main Menu Bar.
- STEP 2.** Click on **Creditor Claimant Entries**.
- STEP 3.** The **Case Number** screen displays.
- Enter the case number in YY-NNNNN format.
 - Click **Next**.
- STEP 4.** Select **Notice of Mortgage Payment Change (NO PROOF OF CLAIM FILED)** from the event list.
- Click **Next**.
- STEP 5.** The **Select the Party:** screen displays.
- If the creditor is already a party to the case:
 - Attorney** filer: select the party, click **Next** and continue with **STEP 7**.
 - Non-Attorney** filer: select the party, click **Next** and continue with **STEP 8**.
 - If the creditor is **not** a party to the case, click on **Add/Create New Party**.
 - A **Search for a party** screen displays.
 - Enter the name of the creditor in the **Last/Business name** field. Refer to the [Style Guide](#) for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
 - Click **Search**.
 - If the creditor is **not listed**, or you see **Party search results** and **No person found**, click on **“Create New Party”**.

- The **Party Information** screen displays. The creditor's name will appear in the Last Name field.
- Address Information:
 - Attorney Filer:** Do **not** add an address.
 - Non-Attorney Filer:** Enter creditor's address. Refer to the [Style Guide](#) for naming conventions and accepted abbreviations.
- At the **Role** field, change the role type to **Creditor**.
- Click **Submit** and continue with **STEP 6**.
- If the creditor **is** in the database, a list will display.
 - If the creditor is listed with an address that matches what was on the original claim, click **Select name from list**. If there is NOT a record with an exact address match, click on "**Create new party**" and follow procedures above.
- The **Party Information** screen displays.
 - At the **Role** drop-down list, select **Creditor** as the Role type.
- Click **Submit**.

STEP 6. The **Select the Party:** screen displays.

- The creditor added is highlighted.
- Click **Next**. If you are a **Non-Attorney** filer, continue with **STEP 8**.

STEP 7. If you have not previously filed a pleading in this case on behalf of the party you represent, a screen displays with the following message: **IMPORTANT: The following attorney/party association(s) will be created in this case. Deselecting 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.**

- Confirm the box is checked for the party you represent.
- Click **Next**.

STEP 8. A message screen displays: **Is this notice being filed pursuant to Bankruptcy Rule 3002.1(b), where a corresponding Proof of Claim has been filed?**

- If a proof of claim has been previously filed, select **Yes** and use the event, **Notice of Mortgage Payment Change**.
- If a proof of claim has NOT previously been filed, select **No**.
- Click **Next**.

STEP 9. Click on **Browse** to select the appropriate PDF to attach.

- Click **Next**.

STEP 10. A message screen displays: **Is a Certificate of Service included or attached to the document currently being filed?**

- Select **Yes** if a certificate of service is attached; or select **No** if a certificate of service is not attached.
- Click **Next**.

STEP 11. A case confirmation screen displays.

- Click **Next**.

STEP 12. The **Docket Text: Final Text** screen displays.

- Confirm the docket text is correct.
- Click **Next**.

STEP 13. The **Notice of Electronic Filing** screen displays.

Notice of Override of Preferred Address 342(e)

Use this event if you have filed a preferred address with the National Creditor Registration Service and want to use a different mailing address in a particular case.

- STEP 1.** Click on **Bankruptcy** on the ECF Main Menu Bar.
- STEP 2.** Click on **Creditor Claimant Entries**.
- STEP 3.** The **Case Number** screen displays.
- Enter the case number in YY-NNNNN format.
 - Click **Next**.
- STEP 4.** Select **Notice of Override of Preferred Address 342(e)** from the event list.
- Click **Next**.
- STEP 5.** The **Select the Party:** screen displays.
- If the creditor is already a party to the case:
 - Attorney** filer: select the party, click **Next** and continue with **STEP 7**.
 - Non-Attorney** filer: select the party, click **Next** and continue with **STEP 8**.
 - If the creditor is **not** a party to the case, click on **Add/Create New Party**.
 - A **Search for a party** screen displays.
 - Enter the name of the party in the **Last/Business name** field. Refer to the [Style Guide](#) for accepted abbreviations for non-individuals (e.g. FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
 - Click **Search**.

- If the creditor is **not** listed, or you see **Party search results** and **No person found**, click on **“Create new party”**.
 - The **Party Information** screen displays. The creditor’s name will appear in the Last Name field.
 - Address Information:
 - Attorney** Filer: Do **not** add an address.
 - Non-Attorney** Filer: Enter creditor’s address. Refer to the [Style Guide](#) for naming conventions and accepted abbreviations.
 - At the **Role** field, change the role type to **Creditor**.
 - Click **Submit** and continue with **STEP 6**.
 - If the creditor **is** in the database, a list will display.
 - If the creditor is listed with an address (the name and address must be an **exact match** and in line with the [Style Guide](#) requirements for entry of names and addresses), click **Select name from list**. If there is NOT a record with an exact match address, click on **“Create new party”** and follow procedures above.
 - The **Party Information** screen displays.
 - At the **Role** drop-down list, select **Creditor** as the Role type.
 - Click **Submit**.
- STEP 6.** The Party Selection screen displays.
- The creditor added is highlighted.
 - Click **Next**. If you are a **Non-Attorney** filer, continue with **STEP 8**.
- STEP 7.** **Attorneys:** If you have not previously filed a pleading in this case on behalf of the party you represent, a screen displays with the following message:
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.

- Confirm the box is checked for the party you represent.
- Click **Next**.

STEP 8. A case verification screen displays.

- Click **Next**.

STEP 9. Click **Browse** to select the appropriate PDF to attach.

- Click **Next**.

STEP 10. The **Docket Text: Modify as Appropriate** screen displays.

- If appropriate, use the drop-down list, and then click **Next**.

STEP 11. The **Docket Text: Final Text** screen displays.

- Confirm the docket text is correct.
- Click **Next**.

STEP 12. The **Notice of Electronic Filing** screen displays.

Notice of Postpetition Mortgage Fees, Expenses, and Charges (Claim Filed)

- STEP 1.** Click on **Bankruptcy** on the ECF Main Menu Bar.
- STEP 2.** Click on **Creditor Claimant Entries**.
- STEP 3.** The **Case Number** screen displays.
- Enter the case number in YY-NNNNN format.
 - Click **Next**.
- STEP 4.** Select **Notice of Postpetition Mortgage Fees, Expenses, and Charges** from the event list.
- Click **Next**.
- STEP 5.** The **Select the Party:** screen displays.
- If the creditor is already a party to the case:
 - Attorney** filer: select the party, click **Next** and continue with **STEP 7**.
 - Non-Attorney** filer: select the party, click **Next** and continue with **STEP 8**.
 - If the creditor is **not** a party to the case, click on **Add/Create New Party**.
 - A **Search for a party** screen displays.
 - Enter the name of the creditor in the **Last/Business name** field. Refer to the [Style Guide](#) for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
 - Click **Search**.
 - If the creditor is **not listed**, or you see **Party search results** and **No person found**, click on **“Create New Party”**.

- The **Party Information** screen displays. The creditor's name will appear in the Last Name field.
 - Address Information:
 - Attorney Filer:** Do **not** add an address.
 - Non-Attorney Filer:** Enter creditor's address. Refer to the [Style Guide](#) for naming conventions and accepted abbreviations.
 - At the **Role** field, change the role type to **Creditor**.
 - Click **Submit** and continue with **STEP 6**.
 - If the creditor **is** in the database, a list will display.
 - If the creditor is listed with an address that matches what was on the original claim, click **Select name from list**. If there is NOT a record with an exact address match, click on "**Create new party**" and follow procedures above.
 - The **Party Information** screen displays.
 - At the **Role** drop-down list, select **Creditor** as the Role type.
 - Click **Submit**.
- STEP 6.** The **Select the Party:** screen displays.
- The creditor added is highlighted.
 - Click **Next**. If you are a **Non-Attorney** filer, continue with **STEP 8**.
- STEP 7.** If you have not previously filed a pleading in this case on behalf of the party you represent, a screen displays with the following message: **IMPORTANT: The following attorney/party association(s) will be created in this case. Deselecting 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.**
- Confirm the box is checked for the party you represent.

- Click **Next**.

STEP 8. A message screen displays: **Is this notice being filed pursuant to Bankruptcy Rule 3002.1(b), where a corresponding Proof of Claim has NOT been filed?**

- If a proof of claim has **NOT** been previously filed, select **Yes** and use the event, **Notice of Postpetition Mortgage Fees, Expenses, and Charges (NO PROOF OF CLAIM FILED)**.
- If a proof of claim has previously been filed, select **No**.
- Click **Next**.

STEP 9. Click on **Browse** to select the appropriate PDF to attach.

- Click **Next**.

STEP 10. The **Select claim(s) from list** screen displays.

- Click on the appropriate claim. The claim number will populate the **Claims Selected** field.
- Click **Next**.

STEP 11. A message screen displays: **Is a Certificate of Service included or attached to the document currently being filed?**

- Select **Yes** if a certificate of service is attached; or select **No** if a certificate of service is not attached.
- Click **Next**.

STEP 12. A case confirmation screen displays.

- Click **Next**.

STEP 13. The **Docket Text: Final Text** screen displays.

- Confirm the docket text is correct.
- Click **Next**.

STEP 14. The **Notice of Electronic Filing** screen displays.

NOTE: This event will not display on the docket report. The event does display on the claims register for the affected claim.

Notice of Postpetition Mortgage Fees, Expenses, and Charges (NO PROOF OF CLAIM FILED)

- STEP 1.** Click on **Bankruptcy** on the ECF Main Menu Bar.
- STEP 2.** Click on **Creditor Claimant Entries**.
- STEP 3.** The **Case Number** screen displays.
- Enter the case number in YY-NNNNN format.
 - Click **Next**.
- STEP 4.** Select **Notice of Postpetition Mortgage Fees, Expenses, and Charges (NO PROOF OF CLAIM FILED)** from the event list.
- Click **Next**.
- STEP 5.** The **Select the Party:** screen displays.
- If the creditor is already a party to the case:
 - Attorney** filer: select the party, click **Next** and continue with **STEP 7**.
 - Non-Attorney** filer: select the party, click **Next** and continue with **STEP 8**.
 - If the creditor is **not** a party to the case, click on **Add/Create New Party**.
 - A **Search for a party** screen displays.
 - Enter the name of the creditor in the **Last/Business name** field. Refer to the [Style Guide](#) for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
 - Click **Search**.

- If the creditor is **not listed**, or you see **Party search results** and **No person found**, click on “**Create New Party**”.
- The **Party Information** screen displays. The creditor’s name will appear in the Last Name field.
- Address Information:
 - Attorney Filer**: Do **not** add an address.
 - Non-Attorney Filer**: Enter creditor’s address. Refer to the [Style Guide](#) for naming conventions and accepted abbreviations.
- At the **Role** field, change the role type to **Creditor**.
- Click **Submit** and continue with **STEP 6**.
- If the creditor **is** in the database, a list will display.
 - If the creditor is listed with an address that matches what was on the original claim, click **Select name from list**. If there is NOT a record with an exact address match, click on “**Create new party**” and follow procedures above.
 - The **Party Information** screen displays.
 - At the **Role** drop-down list, select **Creditor** as the Role type.
- Click **Submit**.

STEP 6. The **Select the Party:** screen displays.

- The creditor added is highlighted.
- Click **Next**. If you are a **Non-Attorney** filer, continue with **STEP 8**.

STEP 7. If you have not previously filed a pleading in this case on behalf of the party you represent, a screen displays with the following message: **IMPORTANT: The following attorney/party association(s) will be created in this case. Deselecting 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.

- Confirm the box is checked for the party you represent.
- Click **Next**.

STEP 8. A message screen displays: **Is this notice being filed pursuant to Bankruptcy Rule 3002.1(b), where a corresponding proof of claim has been filed?**

- If a proof of claim has been previously filed, select **Yes** and use the event, **Notice of Postpetition Mortgage, Fees, Expenses, and Charges**.
- If a proof of claim has NOT previously been filed, select **No**.
- Click **Next**.

STEP 9. Click on **Browse** to select the appropriate PDF to attach.

- Click **Next**.

STEP 10. A message screen displays: **Is a Certificate of Service included or attached to the document currently being filed?**

- Select **Yes** if a certificate of service is attached; or select **No** if a certificate of service is not attached.
- Click **Next**.

STEP 11. A case confirmation screen displays.

- Click **Next**.

STEP 12. The **Docket Text: Final Text** screen displays.

- Confirm the docket text is correct.
- Click **Next**.

STEP 13. The **Notice of Electronic Filing** screen displays.

Oregon Dept. of Revenue Objection

- Step 1.** Click on **Bankruptcy** on the ECF Main Menu Bar.
- Step 2.** Click on **Creditor Claimant Entries**.
- Step 3.** The **Case Number** screen displays.
- Enter the case number in YY-NNNNN format.
 - Click **Next**.
- Step 4.** Select **Oregon Dept. of Revenue Objection** from the event list.
- Click **Next**.
- Step 5.** The **Select the Party:** screen displays.
- If ODR is already a party to the case, select and continue with **STEP 7**. If ODR is **not** a party to the case, click on **Add/Create New Party**.
 - A **Search for a party** screen displays.
 - Enter ODR in the **Last/Business name** field.
 - Click **Search**.
 - As ODR **is** in the database, a list will display.
 - Choose the appropriate ODR record (the name and address must be an **exact match** and in line with the [Style Guide](#) requirements for entry of names and addresses), and click **Select name from list**.
 - The **Party Information** screen displays.
 - At the **Role** drop-down list, select **Creditor** as the Role type.
 - Click **Submit**.
- Step 6.** The **Select the Party:** screen displays.

The creditor added is highlighted.

Click **Next**.

Step 7. A case verification screen displays.

A message displays: **Does the Objection include a Motion to Dismiss?** The default is No. If the Objection to Confirmation of Plan includes a motion to dismiss, change to Yes.

Click **Next**.

Step 8. Click **Browse** to select the appropriate PDF to attach.

Click **Next**.

Step 9. The **Docket Text: Modify as Appropriate** screen displays.

If appropriate, use the drop-down list, and then click **Next**.

Step 10. The **Docket Text: Final Text** screen displays.

Confirm the docket text is correct.

Click **Next**.

Step 11. The **Notice of Electronic Filing** screen displays.

Oregon Dept. of Revenue Withdrawal of Objection

- Step 1.** Click on **Bankruptcy** on the ECF Main Menu Bar.
- Step 2.** Click on **Creditor Claimant Entries**.
- Step 3.** The **Case Number** screen displays.
- Insert the case number using the YY-NNNNN format.
 - Click **Next**.
- Step 4.** Confirm the debtor(s) name and case number are correct.
- Select **Oregon Dept. of Revenue Withdrawal of Objection** from the event list.
 - Click **Next**.
- Step 5.** The **Select the Party:** screen displays.
- Select ODR as the party filer.
 - Click **Next**.
- Step 6.** The **Select the appropriate event(s) to which your event relates:** screen displays.
- If applicable, check the box to the left of the Objection to Confirmation of Plan being withdrawn.
 - Click **Next**.
- Step 7.** Click on **Browse** to select the appropriate PDF to attach.
- Click **Next**.
- Step 8.** The **Docket Text: Modify as Appropriate** screen displays.
- If appropriate, use the drop-down list, and then click **Next**.
- Step 9.** The **Docket Text: Final Text** screen displays.

- Confirm the docket text is correct.
- Click **Next**.

Step 10. The **Notice of Electronic Filing** screen displays.

Reaffirmation with and without Atty Cert; Reaffirm Consumer Debt Secured by Real Property

NOTE: In cases filed on and after 10/17/05, **BOTH OF #B27 AND OF #B240A or OF #B240A/B Alt are mandatory.** To automate preparation of reaffirmation agreements and cover sheets, go to <http://www.njb.uscourts.gov/rap.html>.

- STEP 1.** Click on **Bankruptcy** on the ECF Main Menu Bar.
- STEP 2.** Click on **Creditor Claimant Entries**.
- STEP 3.** The **Case Number** screen displays.
- Enter the case number in YY-NNNNN format.
 - Click **Next**.
- STEP 4.** Select the appropriate **Reaffirmation Agreement** event from the event list.
- Click **Next**.
- STEP 5.** The **Select the Party:** screen displays.
- If the creditor is already a party to the case:
 - Attorney** filer: select the party, click **Next** and continue with **STEP 7**.
 - Non-Attorney** filer: select the party, click **Next** and continue with **STEP 8, 9, or 10**, as applicable.
 - If the creditor is **not** a party to the case, click on **Add/Create New Party**.
 - A **Search for a party** screen displays.
 - Enter the name of the creditor in the **Last/Business name** field. Refer to the [Style Guide](#) for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General

Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.

- Click **Search**.
- If the creditor is **not listed**, or you see **Party search results** and **No person found**, click on “**Create new party**”.
 - The **Party Information** screen displays. The creditor’s name will appear in the Last Name field.
 - Enter creditor’s address. Refer to the [Style Guide](#) for naming conventions and accepted abbreviations. At the **Role** field, change the role type to **Creditor**.
 - Click **Submit** and continue with **STEP 6**.
- If the creditor **is** in the database, a list will display.
 - If the creditor is listed with an address (the name and address must be an **exact match** and in line with the [Style Guide](#) requirements for entry of names and addresses), click **Select name from list**. If there is NOT a record with an exact match address, click on “**Create new party**” and follow procedures above.
 - The **Party Information** screen displays.
 - At the **Role** drop-down list, select **Creditor** as the Role type.
- Click **Submit**.

STEP 6. The **Select the Party:** screen displays.

- The creditor added is highlighted.
- Click **Next**. If you are a **Non-Attorney** filer, continue with **STEP 8**.

STEP 7. **Attorneys:** If you have not previously filed a pleading in this case on behalf of the party you represent, a screen displays with the following message:
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.

- Confirm the box is checked for the party you represent.
- Click **Next**.

STEP 8. If using the Reaffirm Consumer Debt Secured by Real Property event, a screen displays with the following message: **Continue with this event only if you have indicated this is consumer debt secured by Real property. NOTE: Real property is only LAND being purchased, or owned, by the debtor(s) and any structures permanently attached to it. Otherwise, select the event Reaffirmation with Atty Cert or Reaffirmation without Atty Cert.**

- A second reminder appears about the requirement to have a Reaffirmation Agreement coversheet (OF #B27) as the 1st page of any reaffirmation agreement, along with where to retrieve this form.
- Click **Next** and continue with **STEP 12**.

STEP 9. If using the Reaffirmation with Atty Cert event, a screen displays with the following message: **Continue with this event only if the debtors attorney has signed the certification in paragraph one of Part C of the Reaffirmation Agreement and the debtor is not reaffirming consumer debt secured by Real property. NOTE: Real property is only LAND being purchased, or owned, by the debtor(s) and any structures permanently attached to it. Otherwise, select the event Reaffirmation *without* Attorney Cert or Reaffirm Consumer Debt Secured by Real Prop.**

- A second reminder appears about the requirement to have a Reaffirmation Agreement coversheet (OF #B27) as the 1st page of any reaffirmation agreement, along with where to retrieve this form.
- Confirm Part IV. of OF #B240A or Part C of OF #B240A/B Alt is signed or an attorney's certification is attached.
- Click **Next** and continue with **STEP 11**.

STEP 10. If using the Reaffirmation without Atty Cert event, a screen displays with the following message: **Continue with this event only if the debtor was not represented by an attorney in negotiating the Reaffirmation Agreement [i.e., if an attorney did not sign the certification in paragraph one of Part C of the**

Reaffirmation Agreement] and the debtor is not reaffirming a consumer debt secured by Real property. NOTE: Real property is only LAND being purchased, or owned, by the debtor(s) and any structures permanently attached to it. Otherwise, select the event Reaffirmation *with* Attorney Cert or Reaffirm Consumer Debt Secured by Real Prop.

- A second reminder appears about the requirement to have a Reaffirmation Agreement coversheet (OF #B27) as the 1st page of any reaffirmation agreement, along with where to retrieve this form.
- Confirm Part IV. of OF #B240A or Part C of OF #B240A/B Alt is not signed and an attorney's certification is not attached.
- Click **Next**. Continue with **STEP 12**.

STEP 11. The Undue Hardship question displays: **Is this Undue Hardship? Answer Yes if line 10B on OF #B27 is negative EXCEPT always answer No if either: [a] the creditor is a credit union or [b] the case was filed prior to 10/17/05.** Defaults to **No**.

- Answer appropriately.
- Click **Next**.

STEP 12. Enter the name of the creditor in the **Enter Creditor Name in This Reaffirmation Agreement** field.

- Click **Next**.

STEP 13. Click **Browse** to select the appropriate PDF to attach.

- Click **Next**.

STEP 14. The **Docket Text: Modify as Appropriate** screen displays.

- If appropriate, use the drop-down list, and then click **Next**.

STEP 15. The **Docket Text: Final Text** screen displays.

- Confirm the docket text is correct.
- Click **Next**.

STEP 16. The **Notice of Electronic Filing** screen displays.

Request for Hearing

- STEP 1.** Click on **Bankruptcy** on the ECF Main Menu Bar.
- STEP 2.** Click on **Creditor Claimant Entries**.
- STEP 3.** The **Case Number** screen displays.
- Enter the case number in YY-NNNNN format.
 - Click **Next**.
- STEP 4.** Select **Request for Hearing** from the event list.
- Click **Next**.
- STEP 5.** The **Select the Party:** screen displays.
- If the creditor is already a party to the case:
 - Attorney** filer: select the party, click **Next** and continue with **STEP 7**.
 - Non-Attorney** filer: select the party, click **Next** and continue with **STEP 8**.
 - If the creditor is **not** a party to the case, click on **Add/Create New Party**.
 - A **Search for a party** screen displays.
 - Enter the name of the creditor in the **Last/Business name** field. Refer to the [Style Guide](#) for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
 - Click **Search**.
 - If the creditor is **not listed**, or you see **Party search results** and **No person found**, click on **“Create new party”**.

- The **Party Information** screen displays. The creditor's name will appear in the Last Name field.
 - Address Information:
 - Attorney Filer:** Do **not** add an address.
 - Non-Attorney Filer:** Enter creditor's address. Refer to the [Style Guide](#) for naming conventions and accepted abbreviations.
 - At the **Role** field, change the role type to **Creditor**.
 - Click **Submit** and continue with **STEP 6**.
 - If the creditor **is** in the database, a list will display.
 - If the creditor is listed with an address (the name and address must be an **exact match** and in line with the [Style Guide](#) requirements for entry of names and addresses), click **Select name from list**. If there is NOT a record with an exact match address, click on "**Create new party**" and follow procedures above.
 - The **Party Information** screen displays.
 - At the **Role** drop-down list, select **Creditor** as the Role type.
 - Click **Submit**.
- STEP 6.** The **Select the Party:** screen displays.
- The creditor added is highlighted.
 - Click **Next**. If you are a **Non-Attorney** filer, continue with **STEP 8**.
- STEP 7.** **Attorneys:** If you have not previously filed a pleading in this case on behalf of the party you represent, a screen displays with the following message:
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.

- Confirm the box is checked for the party you represent..
- Click **Next**.

STEP 8. The **Select the category to which your event relates** screen displays.

- If you know the category of the event, select the category from the list. If you do not know the category of the event, highlight the entire list.
- Click **Browse** to select the appropriate PDF to attach.
- Click **Next**.

STEP 9. The **Select the appropriate event(s) to which your event relates:** screen displays.

- Check the box to the left of the document you are requesting a hearing on (click on it so a [✓] appears in the box).
- Click **Next**.

STEP 10. The **Docket Text: Modify as Appropriate** screen displays.

- If appropriate, use the drop-down list, and then click **Next**.

STEP 11. The **Docket Text: Final Text** screen displays.

- Confirm the docket text is correct.
- Click **Next**.

STEP 12. The **Notice of Electronic Filing** screen displays.

Request for No Further Notices

This is a text-only event; a document need not be prepared and cannot be filed with the court.

- STEP 1.** Click on **Bankruptcy** on the ECF Main Menu Bar.
- STEP 2.** Click on **Creditor Claimant Entries**.
- STEP 3.** The **Case Number** screen displays.
- Enter the case number in YY-NNNNN format.
 - Click **Next**.
- STEP 4.** Select **Request for No Further Notices** from the event list.
- Click **Next**.
- STEP 5.** The **Select the Party:** screen displays.
- Select the party filer.
 - Click **Next**.
- STEP 6.** Warning messages display: **WARNING: No further notices will be sent to you, any other attorneys who represent your client, or your client, unless you are otherwise on the creditor mailing list (e.g. creditor matrix). If you and your client are active participants in a related adversary proceeding, including one that is closed, you will continue to receive notices in the main bankruptcy case unless you also file a Request for No Further Notices in the adversary proceeding.**
- Click **Next**.
- STEP 7.** The **Docket Text: Modify as Appropriate** screen displays.
- If appropriate, use the drop-down list, and click **Next**.
- STEP 8.** The **Docket Text: Final Text** screen displays.
- Confirm the docket text is correct.

- Click Next.

STEP 9. The **Notice of Electronic Filing** screen displays.

Response to Notice of Final Cure Payment Rule 3002.1 (Claim Filed)

- STEP 1. Click on **Bankruptcy** on the ECF Main Menu Bar.
- STEP 2. Click on **Creditor Claimant Entries**.
- STEP 3. The **Case Number** screen displays.
- Enter the case number in YY-NNNNN format.
 - Click **Next**.
- STEP 4. Select **Response to Notice of Final Cure Payment Rule 3002.1** from the event list.
- Click **Next**.
- STEP 5. The **Select the Party:** screen displays.
- If the creditor is already a party to the case:
 - Attorney** filer: select the party, click **Next** and continue with **STEP 7**.
 - Non-Attorney** filer: select the party, click **Next** and continue with **STEP 8**.
 - If the creditor is **not** a party to the case, click on **Add/Create New Party**.
 - A **Search for a party** screen displays.
 - Enter the name of the creditor in the **Last/Business name** field. Refer to the [Style Guide](#) for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
 - Click **Search**.
 - If the creditor is **not listed**, or you see **Party search results** and **No person found**, click on **“Create New Party”**.

- The **Party Information** screen displays. The creditor's name will appear in the Last Name field.
 - Address Information:
 - Attorney Filer:** Do **not** add an address.
 - Non-Attorney Filer:** Enter creditor's address. Refer to the [Style Guide](#) for naming conventions and accepted abbreviations.
 - At the **Role** field, change the role type to **Creditor**.
 - Click **Submit** and continue with **STEP 6**.
 - If the creditor **is** in the database, a list will display.
 - If the creditor is listed with an address that matches what was on the original claim, click **Select name from list**. If there is NOT a record with an exact address match, click on "**Create new party**" and follow procedures above.
 - The **Party Information** screen displays.
 - At the **Role** drop-down list, select **Creditor** as the Role type.
 - Click **Submit**.
- STEP 6.** The **Select the Party:** screen displays.
- The creditor added is highlighted.
 - Click **Next**. If you are a **Non-Attorney** filer, continue with **STEP 8**.
- STEP 7.** If you have not previously filed a pleading in this case on behalf of the party you represent, a screen displays with the following message: **IMPORTANT: The following attorney/party association(s) will be created in this case. Deselecting 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.**
- Confirm the box is checked for the party you represent.
 - Click **Next**.

STEP 8. A message screen displays: **Is this notice being filed pursuant to Bankruptcy Rule 3002.1(b), where a corresponding Proof of Claim has NOT been filed?**

- If a proof of claim has **NOT** been previously filed, select **Yes** and use the event, **Response to Notice of Final Cure Payment Rule 3002.1 (NO PROOF OF CLAIM FILED)**.
- If a proof of claim has previously been filed, select **No**.
- Click **Next**.

STEP 9. Click on **Browse** to select the appropriate PDF to attach.

- Click **Next**.

STEP 10. The **Select claim(s) from list** screen displays.

- Click on the appropriate claim. The claim number will populate the **Claims Selected** field.
- Click **Next**.

STEP 11. A message screen displays: **Is a Certificate of Service included or attached to the document currently being filed?**

- Select **Yes** if a certificate of service is attached; or select **No** if a certificate of service is not attached.
- Click **Next**.

STEP 12. A case confirmation screen displays.

- Click **Next**.

STEP 13. The **Docket Text: Final Text** screen displays.

- Confirm the docket text is correct.
- Click **Next**.

STEP 14. The **Notice of Electronic Filing** screen displays.

Response to Notice of Final Cure Payment Rule 3002.1 (NO PROOF OF CLAIM FILED)

- STEP 1.** Click on **Bankruptcy** on the ECF Main Menu Bar.
- STEP 2.** Click on **Creditor Claimant Entries**.
- STEP 3.** The **Case Number** screen displays.
- Enter the case number in YY-NNNNN format.
 - Click **Next**
- STEP 4.** Select **Response to Notice of Final Cure Payment Rule 3002.1 (NO PROOF OF CLAIM)** from the event list.
- Click **Next**.
- STEP 5.** The **Select the Party:** screen displays.
- If the creditor is already a party to the case:
 - Attorney** filer: select the party, click **Next** and continue with **STEP 7**.
 - Non-Attorney** filer: select the party, click **Next** and continue with **STEP 8**.
 - If the creditor is **not** a party to the case, click on **Add/Create New Party**.
 - A **Search for a party** screen displays.
 - Enter the name of the creditor in the **Last/Business name** field. Refer to the [Style Guide](#) for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
 - Click **Search**.
 - If the creditor is **not listed**, or you see **Party search results** and **No person found**, click on **“Create New Party”**.

- The **Party Information** screen displays. The creditor's name will appear in the Last Name field.
 - Address Information:
 - Attorney Filer:** Do **not** add an address.
 - Non-Attorney Filer:** Enter creditor's address. Refer to the [Style Guide](#) for naming conventions and accepted abbreviations.
 - At the **Role** field, change the role type to **Creditor**.
 - Click **Submit** and continue with **STEP 6**.
 - If the creditor **is** in the database, a list will display.
 - If the creditor is listed with an address that matches what was on the original claim, click **Select name from list**. If there is NOT a record with an exact address match, click on "**Create new party**" and follow procedures above.
 - The **Party Information** screen displays.
 - At the **Role** drop-down list, select **Creditor** as the Role type.
 - Click **Submit**.
- STEP 6.** The **Select the Party:** screen displays.
- The creditor added is highlighted.
 - Click **Next**. If you are a **Non-Attorney** filer, continue with **STEP 8**.
- STEP 7.** If you have not previously filed a pleading in this case on behalf of the party you represent, a screen displays with the following message: **IMPORTANT: The following attorney/party association(s) will be created in this case. Deselecting 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.**
- Confirm the box is checked for the party you represent.
 - Click **Next**.

STEP 8. A message screen displays: **Is this notice being filed pursuant to Bankruptcy Rule 3002.1(b), where a corresponding proof of claim has been filed?**

- If a proof of claim has been previously filed, select **Yes** and use the event, **Response to Notice of Final Cure Payment Rule 3002.1**.
- If a proof of claim has NOT previously been filed, select **No**.
- Click **Next**.

STEP 9. Click on **Browse** to select the appropriate PDF to attach.

- Click **Next**.

STEP 10. A message screen displays: **Is a Certificate of Service included or attached to the document currently being filed?**

- Select **Yes** if a certificate of service is attached; or select **No** if a certificate of service is not attached.
- Click **Next**.

STEP 11. A case confirmation screen displays.

- Click **Next**.

STEP 12. The **Docket Text: Final Text** screen displays.

- Confirm the docket text is correct.
- Click **Next**.

STEP 13. The **Notice of Electronic Filing** screen displays.

Transfer of Claims

- STEP 1.** Click on **Bankruptcy** on the ECF Main Menu Bar.
- STEP 2.** Click on **Creditor Claimant Entries**.
- STEP 3.** The **Case Number** screen displays.
- Insert the Case Number in the **YY-NNNNN** format.
 - Click **Next**.
- STEP 4.** Select **Transfer of Claim** from the event list.
- Click **Next**.
- STEP 5.** The **Select the Party:** screen displays.
- If the new party (i.e., Transferee) is listed:
 - Attorney** filer: select the party, click **Next** and continue with **STEP 8**.
 - Non-Attorney** filer: select the party, click **Next** and continue with **STEP 9**.
 - If not listed, click on **Add/Create New Party** and continue with **STEP 6**.
- STEP 6.** A **Search for a party** screen displays.
- Enter the name of the creditor in the **Last/Business name** field. Refer to the [Style Guide](#) for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
 - Click **Search**.
 - If the creditor is **not listed**, or you see **Party search results** and **No person found**, click on **“Create new party”**.

- The **Party Information** screen displays. The creditor's name will appear in the Last Name field.
 - Enter the correct address for the transferee. At the **Role** field, change the role type to **Creditor**.
 - Click **Submit** and continue with **STEP 7**.
 - If the creditor is in the database, a list will display.
 - Click on each name until you locate a record **with** the appropriate address when viewing the dialogue box that appears as each name is highlighted. If none of the existing records have an appropriate address, click on "**Create new party**" and follow the steps above.
 - The **Party Information** screen displays.
 - At the **Role** drop-down list, select **Creditor** as the Role type.
 - Click **Submit**.
- STEP 7.** The **Select the Party:** screen displays.
- The creditor added is highlighted.
 - Click **Next**. If you are a **Non-Attorney** filer, continue with **STEP 9**.
- STEP 8.** **Attorneys:** If you have not previously filed a pleading in this case on behalf of the party you represent, a screen displays with the following message:
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.
- Confirm the box is checked for the party you represent.
 - Click **Next**.
- STEP 9.** The **PDF** screen displays.
- Click **Browse** to select the appropriate PDF to attach.

- Click **Next**.
- STEP 10.** A screen displays with existing claims to choose from. Pick the original claim filed from the list, and that claim number will populate the **Claims Selected** field.
- Click **Next**.
- STEP 11.** Choose **Transfer** from the drop-down status list.
- Click **Next**.
- STEP 12.** The Transfer of Claim information screen displays.
- Click on the correct **Transfer type**.
 - Search for transferee.** (The creditor filing the transfer) Enter the transferee's name and/or click on **Search Creditors**. If found, highlight the creditor and click **Select**. If not found, click on **Add New Creditor** and add the creditor's name and address.
 - Search for transferor** (The creditor who filed the original claim) Enter the transferor's name or click on **Search Creditors**. Highlight the creditor's name and click **Select**. The creditor's name and claim number will appear in the box.
 - If the transferee is transferring more than one claim in the case, multiple claims may be chosen.
 - Click **Next**.
- STEP 13.** **EFFECTIVE MAY 1, 2013:** A **Fee** screen displays. The filing fee for each transfer of claim is \$25.00.
- Click **Next**.
- STEP 14.** The **Docket Text: Modify as Appropriate** screen displays.
- If appropriate, use the drop-down list, and then click **Next**.
- STEP 15.** The **Docket Text: Final Text** screen displays.
- Verify the docket text.

- ❑ Click **Next**.

STEP 16. The **Notice of Electronic Filing** screen displays.

NOTE: EFFECTIVE MAY 1, 2013, the electronic payment window displays over the top of the Notice of Electronic Filing for payment of the filing fee for the transfer of claim. See ECF Online Manuals, General category, Paying Fees with the Internet Credit Card Program manual for information on paying fees and the consequences of nonpayment of fees.

Withdrawal of Claim

- STEP 1.** Click on **Bankruptcy** on the ECF Main Menu Bar.
- STEP 2.** Click on **Creditor Claimant Entries**.
- STEP 3.** The **Case Number** screen displays.
- Enter the case number in YY-NNNNN format.
 - Click **Next**.
- STEP 4.** Select **Withdrawal of Claim** from the event list.
- Click **Next**.
- STEP 5.** The **Select the Party:** screen displays.
- If the creditor is already a party to the case:
 - Attorney** filer: select the party, click **Next** and continue with **STEP 7**.
 - Non-Attorney** filer: select the party, click **Next** and continue with **STEP 8**.
 - If the creditor is **not** a party to the case, click on **Add/Create New Party**.
 - A **Search for a party** screen displays.
 - Enter the name of the creditor in the **Last/Business name** field. Refer to the [Style Guide](#) for accepted abbreviations for non-individuals (e.g., FMCC for Ford Motor Credit Company, TMCC for Toyota Motor Credit Company, GMAC for General Motors Acceptance Corp), as well as tips for handling creditor names that exceed 40 characters.
 - Click **Search**.
 - If the creditor is **not listed**, or you see **Party search results** and **No person found**, click on **“Create New Party”**.

- The **Party Information** screen displays. The creditor's name will appear in the Last Name field.
 - Address Information:
 - Attorney Filer:** Do **not** add an address.
 - Non-Attorney Filer:** Enter creditor's address. Refer to the [Style Guide](#) for naming conventions and accepted abbreviations.
 - At the **Role** field, change the role type to **Creditor**.
 - Click **Submit** and continue with **STEP 6**.
 - If the creditor **is** in the database, a list will display.
 - If the creditor is listed with an address that matches what was on the original claim, click **Select name from list**. If there is NOT a record with an exact address match, click on "**Create new party**" and follow procedures above.
 - The **Party Information** screen displays.
 - At the **Role** drop-down list, select **Creditor** as the Role type.
 - Click **Submit**.
- STEP 6.** The **Select the Party:** screen displays.
- The creditor added is highlighted.
 - Click **Next**. If you are a **Non-Attorney** filer, continue with **STEP 8**.
- STEP 7.** **Attorneys:** If you have not previously filed a pleading in this case on behalf of the party you represent, a screen displays with the following message:
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.
- Confirm the box is checked for the party you represent.

- Click **Next**.
- STEP 8.** The following message displays: **In the Status field, choose Withdrawn.** When the Status field displays, in Step 10, select **Withdrawn** from the drop-down list.
- Click **Next**.
- STEP 9.** Select the claim(s) to be withdrawn. Click on the claim(s). The claim(s) number will populate the “Claims Selected” field.
- Click **Next**.
- STEP 10.** The **Status** field displays.
- Select **Withdrawn** from the drop-down list.
 - Click on **Browse** to select the appropriate PDF to attach.
 - Click **Next**.
- STEP 11.** The **Docket Text: Modify as Appropriate** screen displays.
- If appropriate, use the drop-down list, and then click **Next**.
- STEP 12.** The **Docket Text: Final Text** screen displays.
- Confirm the docket text is correct.
 - Click **Next**.
- STEP 13.** The **Notice of Electronic Filing** screen displays.

Withdrawal of Document

- STEP 1.** Click on **Bankruptcy** on the ECF Main Menu Bar.
- STEP 2.** Click on **Creditor Claimant Entries**.
- STEP 3.** The **Case Number** screen displays.
- Enter the case number in YY-NNNNN format.
 - Click **Next**.
- STEP 4.** Select **Withdrawal of Document** from the event list.
- Click **Next**.
- STEP 5.** The **Select the Party:** screen displays.
- Select the appropriate party.
 - Click **Next**.
- STEP 6.** The **Select the category to which your event relates** screen displays.
- Highlight the entire list to bring up all the documents in the case.
 - Click **Next**.
- STEP 7.** The **Select the appropriate event(s) to which your event relates:** screen displays.
- Check the box to the left of the document being withdrawn.
 - Click **Next**.
- STEP 8.** Click on **Browse** to select the appropriate PDF to attach.
- Click **Next**.
- STEP 9.** The **Docket Text: Modify as Appropriate** screen displays.

- If appropriate, use the drop-down list, and then click **Next**.

STEP 10. The **Docket Text: Final Text** screen displays.

- Confirm the docket text is correct.
- Click **Next**.

STEP 11. The **Notice of Electronic Filing** screen displays.

Withdrawal of Rule 3002.1 Notices (No Proof of Claim Filed)

- STEP 1.** Click on **Bankruptcy** on the ECF Main Menu Bar.
- STEP 2.** Click on **Creditor Claimant Entries**.
- STEP 3.** The **Case Number** screen displays.
- Enter the case number in YY-NNNNN format.
 - Click **Next**
- STEP 4.** Select **Withdrawal of Rule 3002.1 Notices (No Proof of Claim Filed)** from the event list.
- Click **Next**.
- STEP 5.** The **Select the Party:** screen displays.
- Select the appropriate party.
 - Click **Next**.
- STEP 6.** The **Select the appropriate event(s) to which your event relates:** screen displays.
- Check the box to the left of the document being withdrawn.
 - Click **Next**.
- STEP 7.** A message screen displays: **Is this Withdrawal being filed where a corresponding proof of claim HAS been filed?**
- If a proof of claim has been previously filed, select **Yes** and use the event, **Withdrawal of Rule 3002.1 Notices PROOF OF CLAIM FILED**.
 - If a proof of claim has NOT previously been filed, select **No**.

- Click **Next**.

STEP 8. Click on **Browse** to select the appropriate PDF to attach.

- Click **Next**.

STEP 9. A case confirmation screen displays.

- Click **Next**.

STEP 10. The **Docket Text: Final Text** screen displays.

- Confirm the docket text is correct.

- Click **Next**.

STEP 11. The **Notice of Electronic Filing** screen displays.

Withdrawal of Rule 3002.1 Notices (Proof of Claim)

- STEP 1.** Click on **Bankruptcy** on the ECF Main Menu Bar.
- STEP 2.** Click on **Creditor Claimant Entries**.
- STEP 3.** The **Case Number** screen displays.
- Enter the case number in YY-NNNNN format.
 - Click **Next**
- STEP 4.** Select **Withdrawal of Rule 3002.1 Notices (Proof of Claim)** from the event list.
- Click **Next**.
- STEP 5.** The **Select the Party:** screen displays.
- Select the appropriate party.
 - Click **Next**.
- STEP 6.** A message screen displays: **Is this Withdrawal being filed where a corresponding proof of claim has NOT been filed?**
- If a proof of claim has not been previously filed, select **Yes** and use the event, **Withdrawal of Rule 3002.1 Notices NO PROOF OF CLAIM FILED**.
 - If a proof of claim has previously been filed, select **No**.
 - Click **Next**.
- STEP 7.** A case confirmation screen displays.
- Click **Next**.
- STEP 8.** A **Select notice to withdraw:** screen displays.
- Select the appropriate notice being withdrawn.
 - Click **Next**.

STEP 9. Click on **Browse** to select the appropriate PDF to attach.

- Click **Next**.

STEP 10. The **Select claim(s) from list** screen displays.

- Click on the appropriate claim. The claim number will populate the **Claims Selected** field.
- Click **Next**.

STEP 11. A case confirmation screen displays.

- Click **Next**.

STEP 12. The **Docket Text: Final Text** screen displays.

- Confirm the docket text is correct.
- Click **Next**.

STEP 13. The **Notice of Electronic Filing** screen displays.

Withdrawal of Special Notice Request

This is a text-only event; a document need not be prepared and cannot be filed with the court.

- STEP 1.** Click on **Bankruptcy** on the ECF Main Menu Bar.
- STEP 2.** Click on **Creditor Claimant Entries**.
- STEP 3.** The **Case Number** screen displays.
- Enter the case number in YY-NNNNN format.
 - Click **Next**.
- STEP 4.** Select **Withdrawal of Special Notice Request** from the event list.
- Click **Next**.
- STEP 5.** The **Select the Party:** screen displays.
- Select the appropriate party.
 - Click **Next**.
- STEP 6.** The **Select the party or parties no longer associated with the case** screen displays.
- Select the appropriate party or parties.
 - Click **Next**.
- STEP 7.** The **Docket Text: Modify as Appropriate** screen displays.
- If appropriate, use the drop-down list, and then click **Next**.
- STEP 8.** The **Docket Text: Final Text** screen displays.

- Confirm the docket text is correct.
- Click **Next**.

STEP 9. The **Notice of Electronic Filing** screen displays.

File Proofs of Claim Including Amendments

Note: For your convenience, fillable form #B10 - Proof of Claim, may be found on our website. www.orb.uscourts.gov Click on Rules & Forms and then on Local Bankruptcy Forms (LBF).

- STEP 1.** Click on **Bankruptcy** on the ECF Main Menu Bar.
- STEP 2.** Click on **File Claims**.
- STEP 3.** The **Search for Creditor** screen displays.
- Enter the case number in YY-NNNNN format.
 - Enter the name of the creditor in the **Name of creditor** field. When searching for a creditor, the more characters entered will narrow the search.
 - The **Type of creditor** field defaults to Blank, so as to search for all possible filers.
 - Reminder messages display:
 - Do NOT file an AmendedClaim in order to change an address. Use the Change of Address event found in the Miscellaneous or Creditor Claimant Entries category.
 - Reminder: To file a Claims Transfer, use the Transfer of Claim event found in the Claim Actions or Creditor Claimant Entries category.**
 - Also: You must file your Proof of Claim on Official Form B10. You may create and file the form using the electronic Proof of Claim program at US Bankruptcy Court, District of Oregon website.**
 - Click Next.
- STEP 4.** The **Select a Creditor for Claim** screen displays.
- If the creditor **is** listed, select the creditor from the drop-down list if the name and address are an **exact** match, A pop-up screen asks you to confirm you have chosen the correct creditor. Click **Yes** and continue with **STEP 11**.
 - If the creditor **is not** listed or **not an exact match BUT** is a common creditor, click on **Add Common Creditor**. A case verification screen displays, followed by

the **Add Common Creditor(s)** screen. Select the common creditor and click **Next**. Confirm name and address are correct and click **Next** again. Proceed to **STEP 7**.

- If the creditor is **not** listed or **not an exact match** and **not** a common creditor, click on **Add Creditor** to add the creditor and continue with **STEP 5**.

STEP 5. A case verification screen displays.

- Click **Next**.

STEP 6. The **Add Creditor(s)** screen displays. Confirm the debtor(s) name(s) and case number are correct.

- Enter the name and address of the creditor. If there are two addresses, one for notices and one for payments, enter the address for notices. Note the instructions for formatting on the screen. Do Not use all caps while adding the name and address (though common name abbreviations like “FMCC” or “ECMC” are fine).

- The **Creditor type** field defaults to **Creditor**.

- Click **Next**.

STEP 7. The **Total Creditors Entered** screen displays.

- Confirm the number of creditors entered is correct.

- Click **Submit**.

STEP 8. The **Creditors Receipt** screen displays.

- Confirm the number of creditors added to database is correct.

- Click on **File A Proof Of Claim**.

STEP 9. The **Search for Creditor** screen displays.

- Confirm the case number is correct or enter the correct case number.

- Enter the entire name or a portion of the name of the creditor in the **Name of creditor** field.

- The **Type of creditor** field defaults to Blank, so as to search for all possible filers.

- Click **Next**.

STEP 10. The **Select a Creditor for Claim** screen displays.

- Confirm the case number and case name are correct.
- Select the creditor from the drop-down list. If the creditor is listed more than once, select the creditor name with the correct address. A pop-up screen asks you to confirm you have chosen the correct creditor. Click **Yes**.

STEP 11. The **Proof of Claim Information For** screen displays.

- Confirm the correct creditor and address are listed.
- If the claim amends a previously filed claim, enter the claim number of the original claim in the **Amends Claim #:** field and click **Find**. On the pop-up screen, click on the original claimant. If the name/address are different, you will be asked to confirm the name and/or address change. If correct, click **Continue**.
- Select the appropriate party from the drop-down list in the **Filed By:** field. The default is **Creditor**.
- If the amended claim changes status (i.e., from secured to unsecured) or the amount for a certain status changes, choose the radio button for **Clear all Amounts** at the bottom of the screen to clear the previous amount(s). Then enter the new amount(s).

NOTE: Pursuant to LBR 3001-1(a)(3)(A)(i), if amending a claim in a Chapter 12 or Chapter 13 AND the debtor is NOT represented by an attorney, LBF #302 is required.

- Enter the amount of the claim in the appropriate fields under **Claimed**. See above for what to do for certain amended claims.
- DO NOT** enter any information in the **Description** and **Remarks** fields.
- Click **Next**.

STEP 12. Click **Browse** to select the appropriate PDF to attach.

- Click **Next**.

STEP 13. The **Notice of Electronic Claims Filing** screen displays.

NOTE: The trustee and the debtor(s)' attorney receive e-mail notification of the filing of the claim even though it is not indicated on the Notice of Electronic Claims Filing.

Query



Figure 2

Query is one of the main items on the blue banner Main Menu (*Figure 2*) that appears immediately after a user logs in. A user can search for a particular case or adversary proceeding by its case number, or search for a case or cases in which an individual or other entity has appeared. A user can find the desired case by using any combination of the available fields shown below in *Figure 3*.

The screenshot shows a 'Search Clues' form with a light yellow background. At the top right of the form is a link for 'Mobile Query'. The form contains several input fields: 'Case Number', 'Last / Business Name' (with examples: Desoto, Des*t), 'First Name', 'Middle Name', 'SSN / ITIN', 'Tax ID / EIN', 'Type' (a dropdown menu), 'Filed Date' and 'Last Entry Date' (each with a date picker and a 'to' field), and 'Nature of Suit (AP and MP cases only)' (a dropdown menu with options: 01 (Determination of removed claim or cause), 02 (Other (e.g. other actions that would have been brought in state court if unrelated to bankruptcy)), 11 (Recovery of money/property - 542 turnover of property), and 12 (Recovery of money/property - 547 preference)). At the bottom of the form are two buttons: 'Run Query' and 'Clear'.

Figure 3

NOTE: PACER charges apply to any query or report run.

Mobile Query

This option provides a limited query display on a mobile device. It allows searches by case number or party name and allows text searches on docket entries in a single selected case. Outputs include Attorney, Party, Deadlines and Docket Entries. Users will be required to provide a PACER login as this application bills for information retrieval in the same manner as the main application query. PACER Case Locator also directs users to this interface.

Search Clues Screen

- STEP 1.** A user may search by Case Number, Last/Business Name, SSN, or Tax ID, Type, Filed Date, Last Entry Date, and Nature of Suit. Values may be entered in the First Name, Middle Name, and/or Type fields to help narrow a Last Name search. Also, the search can be further limited to open or closed cases. In ECF, full business names are always entered in the Last Name field.
- STEP 2.** To Search by **Case Number**, click the case number field and enter the case number (YY-NNNNN for bankruptcy case or YY-NNNN for an adversary proceeding).
- Click on **Run Query** or **Find This Case** to continue or **Clear** to reselect the criteria.
- STEP 3.** To search by **Party Name**, click inside the Last Name field and enter the appropriate information. [Note: A partial name may be entered and the search is not case sensitive. For example, “sim” will bring up cases for simple, Simpson, etc.]
- To further limit the name search, select a specific party type from the drop-down box in the **Type** field.
 - When all of the search clues have been entered, click **Run Query** or **Find This Case** to continue or **Clear** to remove all the entries and begin again.

Results of Search

- STEP 1.** If more than one person record fits the search data, all will display as hyperlinks. Click on the name desired, and a list of associated cases will appear. Next, click on a case number, and a brief summary will appear at the top of the screen with a list of hyperlinked options.
- STEP 2.** Select a desired hyperlink from the following options:
- Alias** - Displays all aliases associated with the debtor(s).
 - Associated Cases** - Displays other bankruptcy cases or adversary proceedings associated with the specific case, if any.
 - Attorney** - Displays all attorneys associated with the case except for those who have only filed claims.
 - Case Summary** - Displays a summary of basic case information which includes dates filed, discharged, dismissed, or converted, names of debtor(s), debtor's attorney, trustee, and other information.

- ❑ **Claims Register** - Displays a claims register which can be generated by Creditor Type, Creditor Name, Creditor Number, Claim Number(s), and Dates(s) Filed/Entered. Two levels of sort are provided.
- ❑ **Creditor** - Displays a list of all creditors in the case.
- ❑ **Deadline/Schedule** - Displays deadlines/hearings set in a case. This report has multiple sort features, hyperlinks to any actual PDF documents.
- ❑ **Docket Report** - Displays the official case docket. It has multiple sorting options, including sort by File Date or Entered on the Docket Date, but for best results, use the "File Date" option. The docket report that is displayed may then be printed.
- ❑ **Filers** - Displays a list of entities who have filed something in the case (NOT including those who have only filed claims) and the date the entity was added to the case. Clicking on the name of an entity will bring up a list of documents filed by that entity, with a hyperlink to docket information for each entry and any related entries on the docket.
- ❑ **History/Documents** - Displays listing of entries/documents made or filed in a case, with sorting options, docket text if desired, and hyperlinks to view the actual PDF documents.
- ❑ **Judge** - Displays the name of the judge assigned to the case and any judge reassignments that have occurred during the case.
- ❑ **List of Creditors** - Displays a creditor mailing matrix/list in either 3 columns format or raw data format. If run in 3 column format, preferred addresses registered with the Bankruptcy Noticing Center are displayed and PACER charges are incurred. If run in raw data format, the addresses displayed are those submitted by the debtor. This lists creditors, debtors, any debtor's attorney, the trustee, and the U.S. Trustee, but it does not include attorneys for other parties. [NOTE: To print mailing labels using commercially available "label paper" (e.g., [Avery 5260](#)) and word processing software (e.g., [Corel WordPerfect](#) or [Microsoft Word](#)), select "3 column format", and copy and paste the names and addresses from ECF to the word processing software using the label function.]

The list of creditors may be run with or without special notice groups. Special mailing groups are created by the court to send selected notices (for example, 341 meeting notices and discharges) to entities who may not otherwise be parties or creditors in the case. Special mailing groups include agencies such as the U.S. Attorney, U.S. Attorney General, Oregon Department of Revenue, Division of Child Support, and Oregon Attorney General.

- ❑ **Notice of Bankruptcy Case Filing** - Displays a *Notice of Bankruptcy Case Filing* with the date and time of filing, and a court seal affixed to prove authenticity. This notice can be printed to show third parties.

- Party** - Displays the names and addresses of all parties who have filed anything in the case (NOT including those who have only filed claims) with the name and address of any attorney who represents them.
- Related Transactions** - Displays case transactions in a box and any other transactions to which it is related (linked). The user may select the type of document to include, pending or terminated (or both), and sort using either filed date, entered date, or document number.
- Status** - Displays most current case status (*i.e.*, Confirmed, Closed, Reopened, Converted, etc).
- Trustee** - Displays name of case trustee.
- View Document** - Displays a screen that allows a search for a specific document by document number. To continue, click on the desired Main Menu item.

STEP 3. To print a report, click on **File, Print** or the **Printer** icon from the browser toolbar.

Reports



Figure 4

Reports is one of the main headings on the ECF banner menu. (See **Figure 4** above) An ECF user can access the following reports via this option: Cases, Claims Register, Docket Report, Calendar Events, Claims Activity, List of Creditors, Docket Activity, Order Query, and Written Opinions. 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.

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.

Click on one of the hyperlinks below to go directly to that section:

[Cases](#)

[Claims Register](#)

[Claims Activity Report](#)

[Docket Report](#)

[Calendar Events](#)

[List of Creditors](#)

[Docket Activity](#)

[Order Query](#)

[Written Opinions](#)

Cases

The Cases Report displays a list of cases that meet the criteria entered on the report selection screen. The Attorney and Non-Attorney filer screens allow searches using the same criteria, but it is presented differently and many criteria are found under “Show more options”.

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

TIPS: Users may leave the **Office**, **Case type**, **Chapter**, or **Trustee** 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 search for cases involving a particular attorney, click on Show more options. You may enter full or partial name information (for example, entering “how” in the last name field will bring up a list of attorney last names including Howard, Howe, Howell, etc. from which you can select) or the Bar ID.

Checking the “Party information” box will result in the inclusion of a list of parties, including addresses, phone numbers, role, and last 4 digits of social security numbers or complete EINs for debtors and joint debtors, for each case listed on the report.

- Office** - Select both or either the Portland or Eugene office.
- Case type** - Select either Adversary Proceeding (ap), Bankruptcy Case (bk), or Miscellaneous Proceeding (mp).
- Chapter** - Select either Chapter 7, Chapter 9, Chapter 11, Chapter 12, Chapter 13, Chapter 15, or 304 Case (Predecessor to Chapter 15).
- Assets** - Select either No, Unknown, Yes, or leave at the blank default.
- Trustee** - Select one or more of the trustees from the list provided.
- Attorney** - Enter the **Last name**, **First name**, and/or **Bar ID** for an attorney. A **Search** button will display. Click **Search** to display any matches to the criteria entered. If a match that is found is correct, click the name to select.

- Attorneys for:** - Several options are presented. The user may select **Debtors, Plaintiffs, Defendants, Creditors, or All.**
- Date Type** - Several options are presented. The user may select the date (or range of dates) that the case(s) were **Filed, Entered, Discharged, Dismissed, Closed, Converted, Split, Transferred or Reopened.**
- 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.
- Pro se cases only** - Click to run a report of cases in which the debtor is not represented by an attorney.
- Voluntary, Involuntary or Small Business** - Click in the box to have the report display voluntary, involuntary or small business cases.
- Type of Debtor, Nature of Debt, Nature of Business** - Select the drop-down arrows to select one of the options listed or leave blank.
- County** - Select the one or more counties for the report to display cases filed in the selected county or counties.
- Number of months without a confirmed plan From/To** - Enter the range of months for cases without a confirmed plan. Click the box next to **Include dismissed cases** to include cases that are dismissed.
- 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.
- Output Format** - Choose between “Formatted display” or “Data only”.
- Non-Attorney Creditor Claimants** will has this additional option:
 - Terminal digit(s)** - Leave blank.

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

STEP 3. To view a case docket, click on the case number hyperlink.

STEP 4. To print the report, click on **File, Print** or the **Printer** 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, and 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 (using YY-NNNNN format).
 - Creditor type** - Leave blank, as all creditors are uploaded to a case.
 - Creditor number** - This box can be ignored as creditor numbers are no longer used.
 - 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. *(Users can enter only the first letter or the first few letters of the creditor's name to get the most thorough search. If users type 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 the specific claim number(s).
 - View multiple documents** - Click the box to select multiple documents from the claims register to view. The user can view multiple documents from the Claims Register in one PDF file.
 - Filed or Entered** - The claims register will display claims filed or entered within the date range specified. By entering dates in the beginning and ending fields, only claims filed or entered within a certain time frame will appear on the report. Leave blank to view all claims.
 - 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.
 - View claims summary report** - The Claims Summary Report gives the viewer a snapshot overview of the claims filed by producing a condensed list of claims.
- STEP 3.** Click **Run Report** to continue or **Clear** to reset the search criteria. The **Claims Register** displays. A summary of the register appears at the bottom of the report.
- STEP 4.** To view a *Proof of Claim* and any supporting documentation, click on the claim number hyperlink in the "History" box where the associated text references a *Claim #_____*. To view a docketed item referenced in the claims register (*e.g.*, withdrawal,

objection to claim, transfer of claim, etc.), click on the document number hyperlink next to the docket text for the desired document. To view the case docket, click on the case number hyperlink at the top of the claims register.

STEP 5. To print the claims register, click on **File, Print** or the **Printer** icon from the browser toolbar.

Claims Activity

The Claims Activity Report lists information about claims (generally not all pertaining to a single case as with the *Claims Register*) along with links to any associated documents. For example, this report can display a list of all claims filed in a particular case involving a single trustee.

- STEP 1.** Click on **Reports** on the ECF Main Menu, and then click on the **Claims Activity** 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** - 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.
 - Trustee** - To limit the claims displayed to those filed for a particular **trustee**, select the desired option from the drop-down list. 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.
 - Chapter** - To limit the claims displayed to those filed in a particular chapter, select the appropriate option from the drop-down list. 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.
 - Creditor name** - To limit claims to those filed by a particular creditor, enter the name. (*Enter only the first letter or the first few letters of the creditor's name to get the most thorough search. If the entire name is entered, only exact matches will be displayed*).
 - Entered Between** - To limit claims by the date on which they were entered, 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.
- To view a *Proof of Claim* and any supporting documentation, click on the claim number hyperlink in the left column.
- STEP 5.** To print, click on **File, Print** or the **Printer** icon on the browser toolbar.

Docket Report

The Docket Report allows the user to view and print a listing of all events docketed to a specific case. The default for the display of docket entries on this report is oldest date first, but the user has the option to switch the display order, as noted below in **STEP 2**. Additional dates and deadlines now display on the caption of the docket report. All deadlines will display the most recent date whether or not it is terminated. A link to the Claims Register will display if claims have been filed.

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. **Case number** - The case number of the last case 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" (date the document was filed) rather than "entered" (date the entry was recorded by the Court in ECF) by clicking the desired radio button.

After selecting the **Filed** or **Entered** option, you may choose to enter a date range using the format MM/DD/YY or MM/DD/YYYY to limit the display.

You can enter a start date with no end date, which will include all entries from the date specified onward, or 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 document number range to limit the display. This feature enables users to be charged only for the desired data on large cases.

- Include terminated parties** - Displays 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 *Notice of Electronic Filing*** - Provides 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 received electronic notification of the filing.
- Include Page counts for documents** - Displays the page count for each document on the docket report.
- Document options** - Click in the appropriate box if it is desired to (1) Include headers when displaying PDF documents (this box may already be checked if you checked "Add Headers to PDF Documents" in Maintain Your ECF Account); (2) View multiple documents; and/or (3) Create Appendix. The Create Appendix option also allows the user to Include on the Docket Sheet all docket entries in this case or selected docket entries only, as well as an option to include PDF documents.
- HTML and Text** - Click on the radio button to obtain the type of report desired.
- 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 view a specific document, click on the document number hyperlink.

STEP 5. To view the *Notice of Electronic Filing*, click on the silver ball next to the docket number hyperlink.

- Click the desired radio button for **Select Receipt Type**. Defaults to **Html Version**.
- Click **Display Receipt** to continue or **Clear** to re-select receipt type.

- The *Notice of Electronic Filing* screen displays.
- To print the *Notice of Electronic Filing*, click **File**, **Print** or the **Printer** icon on the browser toolbar.

STEP 6. To print the docket, click **File**, **Print** or the **Printer** icon on the browser toolbar.

Calendar Events

This report will provide a list of scheduled hearings 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, and 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: Users may leave the **Case number** and **Judge** 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 item(s). The default setting is for "all".

- Case number** - Enter a case number if a schedule only for a particular case is desired.
- Judge** - Click on one or more names from the list to limit the calendar to (a) particular judge(s). If judge is selected, then options for Hearing Judge, Case Judge and Hearing or case judge will display.
- Office** - Click on either Portland or Eugene to limit the calendar to either of those offices.
- Type** - Select one or more types from the list. The default is All Hearings.
- Set** - Enter the beginning date and ending date for the desired hearings(s) in MM/DD/YY format and click either AM or PM or Both.
- Time** - Enter the time, if desired, or leave blank for all.
- Sort by** - The default sort for the report is by hearing time and case number. The "Office, Time" sort may be selected, but events which are not associated with a case or an office will be listed under the first office.
- Initial display of related proceedings** - Select either **Expanded** or **Collapsed**.

- Display only proceedings directly related to the calendar event** - Select, if desired.
- 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 Report*. User may change the sort or simply click **Run Report**. (*Refer to preceding Docket Report section of this manual for specific information on how to generate a docket report*).
- STEP 6.** Clicking on the “+” sign next to a document number will bring up any related proceedings with hyperlinks to the documents giving rise to the proceedings.
- STEP 7.** To print the report, click on **File, Print** or the **Printer** icon from the browser toolbar.

List of Creditors

This report displays the list of names and addresses of creditors and parties for a specific case. The list contains those creditors uploaded at case opening and those added later, and also includes parties that have filed a pleading or *Special Notice Request* in a case.

STEP 1. Click on **Reports** from the Main Menu, and then click on the **List of Creditors** 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-XXXXXX format.
- Special mailing group** -Select "All" to include all special mailing groups, select specific group(s) to display the names and addresses of only their members, or leave blank to exclude special mailing group members.
- Format** - Select either a "3 column" format or a "raw data format" (pipe-delimited). The 3-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. [NOTE: To print mailing labels using commercially available "label paper" (e.g., [Avery 5260](#)) and word processing software (e.g., [Corel WordPerfect](#) or [Microsoft Word](#)), select "3 column format", and copy and paste the names and addresses from ECF to the word processing software using the label function.]

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

STEP 3. To print the creditor mailing matrix/list, click **File, Print** or on the **Printer** icon from the browser toolbar.

Note: If run in 3 column format, preferred addresses registered by the creditor with the Bankruptcy Noticing Center are displayed and PACER charges are incurred. If run in raw data format, the addresses displayed are those submitted by the debtor and no PACER charges are incurred. This list contains creditors, debtors, any debtor's attorney, the trustee, and the U.S. Trustee, but it does not include attorneys for other parties.

Docket Activity

This report provides a list of docket entries in the user's cases on a specific date or range of dates. It is particularly useful if e-mail account or Internet Service Provider (ISP) problems have caused you not to receive *Notices of Electronic Filing* for a particular date.

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

STEP 2. Selection Criteria include:

TIP: User may leave the **Case number**, **Office**, **Case type**, and **Category** 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.

- Case number** - Enter the case number if you simply want a list of docket entries for only one case.
- Attorney Filers: Only cases to which I am linked** - Check the box if this limitation is desired.
- Office** - Select either Portland or Eugene (clicking on neither will default to both offices).
- Case type** - Select main bankruptcy case (bk), adversary proceeding (ap), and/or miscellaneous proceeding (mp).
- Category** - Select one or more categories from the list (*e.g.*, answer, appeal, order, plan, etc.).
- Open cases/Closed cases** - Select either of these options as desired.
- Entered between** - Enter the date range (using month, day, and year) for which you would like to view all activity in your cases. The time range may be entered or left blank.

- Summary Text or Full Docket Text** - Choose “Summary Text” for a short description of the document (*e.g.*, withdrawal of claim) or “Full Docket Text” for the complete docket text including the name of the filer.
- Sort by** - Two sort criteria are offered (case number and date/time). Click the down arrow to the right of the field and choose one of the options.

STEP 3. Click **Run Report**. The report will display.

STEP 4. To view a document, click on the Document Number hyperlink under “Doc ID”. To view a docket report, click on the Case Number hyperlink.

STEP 5. To print the report, click **File, Print** or the **Printer** icon on the browser toolbar.

Order Query

This report will allow the user to check on the status of any order submitted, but not yet signed or entered by the Court.

- STEP 1.** Click on **Reports** on the ECF Main Menu Bar.
- STEP 2.** Click on **Order Query**.
- STEP 3.** The **Query Order Status** screen displays.
- Enter the case number using the YY-NNNNN or YY-NNNN format.
 - Enter the last name of the party submitting the order if known.
 - Click **Next**.
- STEP 4.** The screen will then show the status of any pending (*i.e.*, unsigned) proposed orders.
- If desired, click on the **Case Number** hyperlink to view the docket, the **Related Doc#** hyperlink to view the underlying motion or application, or the **Order** hyperlink to view the proposed order.
 - If a submitted order does not appear on this screen, it may have been signed by the judge, in which case you will receive electronic notification when it is docketed. Alternatively, the judge may have denied the motion or application and deleted it from ECF, in which case the judge will be notifying the interested parties regarding the reasons the motion or application was denied (generally via correspondence).
- STEP 5.** To print the contents of the order status screen, click **File, Print** or on the **Printer** icon from the browser toolbar.

Written Opinions

This report will allow the user to access written opinions pertaining to a particular case, or opinions issued from a particular office and/or date range. [NOTE: Written opinions can also be obtained from the [Opinions](#) portion of the Court's web site.]

STEP 1. Click on **Reports** on the ECF Main Menu Bar, and then click on the **Written Opinions** hyperlink. The **Written Opinions Report** screen displays. The following fields are available for selecting/entering criteria for generating the report:

- Case Number** - If seeking an opinion in a particular case, enter the case number using the YY-NNNNN or YY-NNNN format.
- If seeking an opinion in a particular case where the case number is unknown, enter party information using **Last Name**, **First Name**, and/or **Middle Name**.
- Office** - Click on either "Portland" or "Eugene" to limit the search to a particular office.
- Filed between** - If seeking (an) opinion issued on a particular date, or all those in a particular date range, enter the applicable date(s) in the box(es).
- Summary text** or **Full docket text** - Choose "Summary text" for a short description of the document or "Full docket text" for the complete docket text including the filer.
- Sort by** - From the pull-down menu, select either "Case Number" or "Date Filed".

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

STEP 3. The screen will then display a *Written Opinions Report* with hyperlinks to the cases and opinions meeting the search criteria selected in Step 1. To access the opinion, click on the hyperlink under "Doc. #". To access the docket for a case, click on the hyperlink under "Case Name & Number".

STEP 4. To print either the *Written Opinions Report* or any of the opinions hyperlinked to that report, click **File, Print** or on the **Printer** icon from the browser toolbar (or from Adobe Acrobat if printing an opinion).

Utilities



Figure 1

Utilities is one of the main items on the blue banner Main Menu (*Figure 1*) that appears immediately after a user logs in. Utilities may be used to change your password, change your client code, change your PACER account, review internet payment history and internet payments due, maintain your ECF account, review billing history, clear default PACER login, view your PACER account information, view your transaction log, find mailing information, verify a document, and find other court information including links to other court sites and to PACER case locator.

STEP 1. Click on **Utilities** on the ECF Headings Bar.

STEP 2. Menus titled **Your Account**, **Miscellaneous**, **New R3.1 Menu Items**, et al. will display.

- The items on the **Your Account** menu allow you to access and manage your interactions with the ECF system as well as your PACER account as long as you have your PACER account associated with your login.
 - To associate your login to your PACER account, go to Reports or Queries and click any menu item. You will be prompted for your PACER login and password. If you click the box which says **Make this my default PACER login**, you won't need to enter it again and you will have all of the options listed here on your Utilities menu. If you do not do this, the options that allow you to manage your PACER account will not appear on your menu.
- The items on the **Miscellaneous** menu give you access to creditor lists for mailing and service purposes.
- Clicking on **Court Information** gives access to the following topics: Court Details; Court Locations; PACER Details; and Flag Definitions (Flags are found in the upper right hand corner of a given case docket). There is an option to "View as XML" at the bottom of the page. A link for this utility also appears on the CM/ECF "Welcome" page.
- Clicking on **Links to Other Courts** provides access to the PACER Individual Court Sites page to access other court sites. This link allows the user to navigate quickly between CM/ECF and PACER.

- Clicking on **PACER Case Locator (National Index)** provides access to the PACER Case Search Sign In page to login to PACER's Case Locator. This link allows the user to navigate quickly between CM/ECF and PACER.

Change Your Password

This option allows you to change your password. Passwords must be at least eight (8) characters, both uppercase and lowercase letters, and at least one digit or special character (e.g., @, %, &)

- STEP 1.** Click on **Utilities**, then under **Your Account** heading, click the **Change Your Password** hyperlink.
- STEP 2.** Enter your new password in the **New password** field.
- STEP 3.** Re-enter your new password in the **Re-enter new password** field.
- STEP 4.** Click **Submit**. A screen will display indicating whether or not you successfully changed your password.

If you have forgotten your password:

- At the ECF login screen, click the link found at "If you have lost or forgotten your CM/ECF password, click here"/
- At the Password Changes screen, enter your ECF login name and type the "Captcha" word. Your ECF account must have an active email address associated with it so that a link to enable you to change your password can be emailed to you.
- Check your email for the link to change your password. At the screen, you will be prompted for your ECF login name and will be able to set a new password.
- If you want your **login** changed, contact the court and specify the desired login.

Change Your Client Code

This option allows entry of a new client code which is provided to the PACER user as a means of tracking transactions by client. This code can be up to thirty-two alphanumeric characters long. It is used for reporting charges made to the current PACER account.

- STEP 1.** Click on **Utilities**, then, under the **Your Account** heading, click the **Change Your Client Code** hyperlink.
- STEP 2.** Enter a new client code.

STEP 3. Click **Submit** to continue or **Clear** to reset.

STEP 4. Click on a Heading option of your choice on the blue ECF banner to continue.

Change Your Pacer Account

This screen lets you specify the PACER account to be charged for accessing ECF data. You will still have the privileges of the ECF account you used to start this session.

STEP 1. Click on **Utilities**, then, under the **Your Account** heading, click the **Change Your PACER Account** hyperlink.

STEP 2. Enter PACER login, password, and an optional client code.

STEP 3. If you check the box labeled "Make this my default PACER login", the one you enter here will replace any default you specified previously (if you establish a default, you will not be asked for a PACER login when you request data).

STEP 4. Click **Login** to continue or **Clear** to reset.

STEP 5. Click on a Heading option of your choice on the blue ECF banner to continue.

Internet Payment History

This option allows you to view your internet payment history during a specific date range.

STEP 1. Select **Utilities** then, under the **Your Account** heading, click on **Internet Payment History** hyperlink.

- The **Internet Payment History** screen displays.
- Enter the date range.
- Click **Run Report** to continue or **Clear** to re-select the date range.

STEP 2. The screen will display the Internet Payment History for [X], where [X] is the login used to access this report.

STEP 3. To print the report, click **File, Print** or the **Printer** icon on the browser toolbar.

Internet Payments Due

This option allows you to verify there are no outstanding fees due or pay any outstanding fees due.

- STEP 1.** Select **Utilities** then, under the **Your Account** heading, click on **Internal Payments Due** hyperlink.
- If there are no outstanding fees due, the following message will display: **No outstanding fees found!**
 - If there are outstanding fees due, the **Internet Payments Due** screen displays.
 - Either click on the **Select all** button or click the box next to the outstanding fee to pay.
 - Click **Next**.
 - Confirm the outstanding fee due displayed is correct and click on **Pay Now**.
 - The **Online Payment** screen displays. Continue with payment of the outstanding fee.

Maintain Your ECF Account

This function allows you to update your personal information and instructions about email notification.

- STEP 1.** Select **Utilities** then, under the **Your Account** heading click on **Maintain Your ECF Account** hyperlink.
- The **Maintain User Account** screen displays.
 - Make appropriate changes or additions to your address, telephone number and/or fax number. NAME FIELDS CANNOT BE MODIFIED.
 - Click **Submit** upon completing all changes/additions or **Clear** to reset.
 - The **Searching for existing Party Records - Open/Closed cases** screen displays. If you want any changes to your address, telephone number and/or fax number to apply to open and closed cases, leave both boxes checked; or, uncheck the appropriate box.
 - Click **Submit**.
 - The **Searching for existing Attorney Records** screen displays. Select the appropriate records to update.
 - Click **Submit**.
 - An **Updating person record** screen displays verifying the update was successful.

- Click on **Return to User Maintenance** or on a Heading option of your choice on the blue ECF banner to continue.
- STEP 2.** Click the **Email information** button to specify how you want to be notified of ECF filings and the email address at which you want to receive notification.
- The email information for your account appears.
 - Primary email address** - specify the complete email address.
 - Reenter primary email address** - re-enter the primary email address.
 - Secondary email address** - enter the complete email addresses of additional email recipients, if any.
 - Reenter secondary email address** - re-enter the additional email addresses, if any.
 - Send the notices specified below** - select either or both of the options: **to my primary email address**; and/or **to the secondary addresses**.
 - To receive notices for cases in which you are involved, check the box for **Send notices in cases in which I am involved**.
 - To receive notices for a case in which you are not involved, check the box for **Send notices in these additional cases** and enter the case number(s) in the text box.
 - To receive notices for both adversary proceedings which you are directly involved and their related bankruptcy cases, select the radio button next to **Send notices for adversary proceedings in which I am directly involved and for their related bankruptcy cases**.
 - To receive notices for only adversary proceedings in which you are directly involved but not the related bankruptcy cases, select the radio button next to **Send notices for adversary proceedings in which I am directly involved but not for their related bankruptcy cases**.
 - If you wish to receive a notice after each filing in ECF, select the radio button next to **Send a notice for each filing**.
 - If you wish to receive a daily summary of filings in ECF, select the radio button next to **Send a Daily Summary Report**.
 - Format notices** - select appropriate format: Either **HTML format** (for Netscape, Microsoft Explorer or ISP email service) or **Text format** (for cc:Mail, GroupWise, other email service).

- Click **Return to Account screen** to continue making changes to your account and/or to submit changes once completed.
- Click **Submit** to make changes or click **Clear** to clear changes you may have made.
- Click **Submit** to continue with update of person
- Click on the **Return to User Maintenance** hyperlink or on a Heading option of your choice on the blue ECF banner to continue.

STEP 3. Click the **More user information** to see the groups to which you belong. Group membership determines which functions you may use.

- Attorneys:** See the on-line manual, **Using Filing Agents**, on the Court's website for procedures to create and deactivate agents and to associate a filing agent's email address with an attorney record.

Review Billing History

This option displays the number of ECF pages accessed and charges incurred for the PACER account you are currently using. Click on **Utilities**, then, under the **Your Account** heading, click on **Review Billing History** hyperlink.

- The PACER login screen will display in a separate window. Enter your PACER login/password. If you have set your PACER login/password as a default in ECF, the Billing History screen will display
- User** - Confirm the user name is correct.
- Court** - Select the appropriate option.
- Date Range** - Enter date range for which you want to see the billing data. **NOTE:** charges incurred at this ECF site from 11/1/07 to the present can be viewed. Older transactions can be viewed from the PACER Service Center Web site. There options for **Today**, **This Week**, **This Month**, and **This Quarter** which can be selected instead of a date range.
- Sort Order** - You can sort the report by **Transaction Date**, by **Client Code**, by **Court/Transaction Date** or by **Court/Client Code**.
- Options** - Select the appropriate option.

STEP 1. Click **Submit Form** to continue or **Clear Form** to reset display criteria. Billing history will display.

STEP 2. Click on the red X in the upper right corner to exit PACER.

STEP 3. Click on a Heading option of your choice on the blue ECF banner to continue.

Clear Default PACER Login

This option removes the association between your ECF login and default PACER account so that a new default can be set.

STEP 1. Click on **Utilities** from the blue banner Headings bar, then click on **Clear Default PACER Login** hyperlink.

STEP 2. A message displays: **Default Pacer Account now removed.**

View Pacer Account Information

This option displays the current PACER account and client code, if any, in which you are currently logged into the database.

STEP 1. Click on **Utilities** from the blue banner Heading bar, then click on **View PACER Account Information** hyperlink.

System displays the account information used to log into PACER.

STEP 2. To continue, click on a Heading on the blue ECF banner.

View Your Transaction Log

This option displays details of all transactions (docketing, etc.) in ECF on or between the dates you specify.

STEP 1. Click on **Utilities** from the blue banner Headings bar, then click on **View Your Transaction Log** hyperlink.

STEP 2. Enter the start date and end date for the report you want displayed.

STEP 3. **Sort by** - The report can be sorted by **Date and time** and **Case Number**.

STEP 4. Click **Submit** to continue or **Clear** to reset the dates.

A list of all your activities in ECF during the time specified displays.

To print the transaction log, click **File, Print** or on the **Printer** icon on your browser toolbar.

STEP 5. To continue, click on a Heading on the blue ECF banner.

Mailings...

This option gives you access to List of Creditors, Mailing Information for a Case and Mailing Matrix by Case.

List of Creditors - Displays creditor names/addresses for a single case.

- STEP 1.** Click on **Utilities** and, under the **Miscellaneous** menu, click on **Mailings...**, then, click the **List of Creditors** hyperlink.
- Case Number** - Enter the case number of the bankruptcy case in the YY-NNNNN format.
 - Special Mailing Group** - Skip this field.
 - Format** - Select either a "3 column" format or a "raw data format" (pipe-delimited). The one column file can be saved as a text file on your computer with the "File/Save As" browser option. The saved file can then be edited and printed on labels.

Note: If run in 3 column format, preferred addresses registered by the creditor with the Bankruptcy Noticing Center are displayed and PACER charges are incurred. If run in raw data format, the addresses displayed are those submitted by the debtor and no PACER charges are incurred. This list contains creditors, debtors, any debtor's attorney, the trustee, and the U.S. Trustee, but it does not include attorneys for other parties..

STEP 2. Click **Run Report** to continue or **Clear** to reset the selections.

STEP 3. Click on **View Labels**.

Mailing Information for a Case - Displays a list of names of the e-filers who will receive electronic notice, a list of the names and addresses of those who should receive manual notice (this list may not be complete), a link to the creditor list and a link to a mailing matrix for a single case.

- STEP 1.** Click on **Utilities** and, under the **Miscellaneous** menu, click on **Mailings...**, then click the **Mailing Info for a Case** hyperlink.
- On the **Mailing Information for a Case** screen, enter the case number using the YY-NNNNN format.

STEP 2. Click **Submit**.

Mailing Matrix by Case - Allows the user to select mailing labels for all participants in the case or any combination. No PACER charges are incurred. Use this option to ensure service on all parties and creditors.

- STEP 1.** Click on **Utilities** and, under the **Miscellaneous** menu, click on **Mailings...**, then click the **Mailing Matrix by Case** hyperlink.
- On the **Mailing Matrix by Case** screen, enter the case number using the YY-NNNNN format.
 - Select All participants for case or select any combination of **Participants, Special mailing group, Creditors, Judge, Attorneys, Debtor's attorney(s), US Trustee, or Trustee.**
 - Select the **Print format.**
 - Click **Next.**
 - The labels will display in Adobe.
- STEP 2.** To continue, click on a Heading on the blue ECF banner.

Verify a Document

- STEP 1.** Click on **Utilities** from the Main menu and, under the **Miscellaneous** menu, click on the **Verify a Document** hyperlink.
- STEP 2.** Enter the case number using the YY-NNNNN format.
- STEP 3.** Enter the document number you wish to verify.
- STEP 4.** Click **Next.**
- STEP 5.** If the case and document are valid, the following items are displayed:
- Case Number and Title** - Click on the number and name(s) hyperlink to view the case docket.
 - Docket entry** - The filed date, document number and docket text of the entry in which the document was filed are listed. Click on the document number hyperlink to view the PDF.
 - File size is** - The size of the document in bytes is displayed.
 - Original Signature(s) and Verified Signature(s)** - Lists the document number, document description, original filename and electronic document stamp. **NOTE:** If these are not shown, there is no PDF document associated with the docket entry.

- Verification** - States whether the original and verified signatures are the same or different.

PARTIAL REVISION HISTORY

Date	Page/Section	Revision
2/20/18	Special Notice Request/Page 8	Updated Intro to match current message in event