

Reports

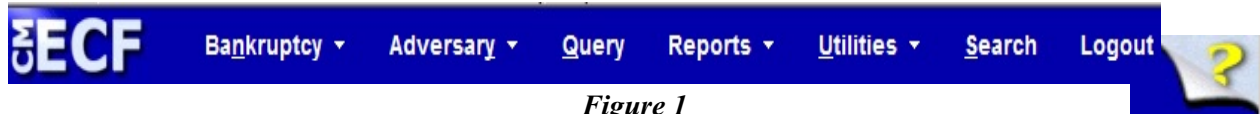


Figure 1

Reports is one of the main headings on the ECF banner menu. An ECF user can access the following reports via this option: Cases, Claims Register, Claims Activity, Docket Report, Calendar Events, 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. (See Figure 1 above)

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:

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Cases

The Cases Report displays a list of cases that meet the criteria entered on the report selection screen. Below is the attorney view of the screen. The trustee, non-attorney creditor, and U.S. Trustee screen allow searches using the same criteria, but it is presented differently and many criteria are found under “Show more options”.

Office

Assets

Case Type

Chapter

Trustee

Attorney

Last name

First name

Bar ID

Date Type **From** **to**

Open cases Party information

Closed cases Pro se cases only

Voluntary Involuntary Small Business Cases

Type of Debtor **Nature of Debt** **Nature of Business**

County

Number of months without a confirmed plan **From** **To** Include dismissed cases

Sort by

Output Format Formatted display Data only Include field descriptions

TIPS: To search on all possible values in a dropdown list (for example, to search for both Portland and Eugene cases under Office), leave the blank default selected.

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, 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.

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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 in box to display a claims register that will include a checkbox next to each claim, claim attachment or claim related proceeding. Each PDF selected will then be combined into one large PDF file for the user to view or print.
 - 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** - Click in box to display a condensed list of claims. Hovering the cursor over claim amount will display a breakdown of the

claim amounts. The “View” hyperlink displays more detailed information for each claim. Click the creditor name to view claimant address or transfer information. Click on individual column headers (i.e., claim #, date filed and creditor name) to sort the report differently.

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 the **Print** button or icon from the browser toolbar.

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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 Report** 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 trustee's name 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 or an exhibit to a claim, click on the claim number or exhibit hyperlink in the left column.

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

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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.

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

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

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

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

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

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

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

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

- Include links to *Terminated parties*, *Links to Notice of Electronic Filing*, and/or *Page counts for documents*** - Click in the appropriate box to (1) have terminated parties display, (2) have access to the *Notice of Electronic Filing* for certain documents - the hyperlink back to a copy of the *Notice of Electronic Filing* that was created when the event was originally filed will show on the docket as a "silver ball" link; it will reflect those parties who received electronic notification of the filing, and (3) have the docket display include the number of pages for each document associated with an entry.
- Document options** - Click in the appropriate box if it is desired to (1) Include headers when displaying PDF documents, (2) View multiple documents, and/or (3) Create Appendix that a) includes all docket entries in the case or selected docket entries only, and/or b) includes PDF documents for only documents selected on the next screen.
- HTML and Text** - Click on the appropriate 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 with various critical deadlines, dates and other information for that case. All deadlines will display the most recent date whether or not it has been terminated. There will be a link to the claims register, if claims have been filed in the case, and a link to show associated cases if there are any associated cases.

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**.
- Click **Display Receipt** to continue or **Clear** to re-select receipt type.
- The *Notice of Electronic Filing* screen displays.
- To print click the **Print** button or icon on the browser toolbar.

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

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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**, **Judge**, and **Office** 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 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/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 calendar event 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. “Trustee” and “Office, Time” may also be selected. If the "Office, Time" sort is selected, 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 silver ball will bring up any related proceedings with hyperlinks to the documents giving rise to the proceedings.

STEP 7. Clicking on the hyperlinks for “docket entries only” or “claims report” will bring up the related reports for a selected case.

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

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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-XXXXX format.
- Special Mailing Group** -Select "All" to include all special mailing groups, select specific group(s) to display the names and addresses of include only their members, or leave blank to exclude special mailing group members.
- Format** - Select either a "3 columns" format or a "raw data format" (pipe-delimited).

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

STEP 3. To print the mailing matrix/list, click on the **Print** button or 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 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.]

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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.
- Only cases to which I am linked** - Deselect the box if this limitation is not desired.
- Office** - Select either Portland or Eugene .
- Case Type** - Select adversary proceeding (ap), main bankruptcy case (bk), 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 or both 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, and the time, if desired.
- 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 the **Print** button or icon on the browser toolbar.

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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, or leave blank to display status of all pending proposed orders for the case.
- 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 notify 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 on the **Print** button or icon from the browser toolbar.

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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 Number & Name".

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

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