

ECF 5.0/5.1 ENHANCEMENTS

U.S. Bankruptcy Court for the District of Oregon

PACER Links in CM/ECF

Two new menu selections appear under the *Utilities* menu to allow the user to navigate quickly between CM/ECF and PACER. The user will not have to leave the CM/ECF session to access another court in PACER or to use the PACER Case Locator.

When the **PACER Case Locator** link is clicked, the Case Search Sign In page displays.

Additionally, PACER Service Center has made the following updates to the PACER Case Locator:

- Attorney information is now extracted for bankruptcy and adversary cases
- Alias records are now returned by a search based on SSN/ITIN or Tax ID/EIN
- Debtor and Joint Debtor Disposition values are extracted on all cases for which a disposition exists.

Docket Report Enhancements

The Create Appendix option has been modified to allow more flexibility in customizing a docket report. Now the user may select only desired entries and determine whether the PDF document is appended to this customized report. Or, if the user just wants an abbreviated docket report without attached PDF documents, the user can select only the entries needed.

The screenshot shows the ECF Docket Sheet interface. At the top, there are navigation tabs for Bankruptcy, Adversary, Query, and Reports. The main heading is "Docket Sheet". Below this, there is a search section with a "Case number" field containing "10-10010" and a "Find This Case" button. There are radio buttons for "Filed" (selected) and "Entered", followed by date range pickers. Below that are "Documents" fields with a "to" separator. The "Include:" section has three checkboxes: "Terminated parties", "Links to Notices of Electronic Filing", and "Page counts for documents". The "Document options:" section has two checkboxes: "Include headers when displaying PDF documents" and "View multiple documents". A red-bordered box highlights the "Create Appendix" section, which includes a checked checkbox for "Create Appendix", a sub-section "Include on the Docket Sheet" with radio buttons for "all docket entries in this case" (selected) and "selected docket entries only", and a checked checkbox for "Include PDF documents" with the note "(select documents on the next screen)".

Page Counts on Docket Report

The number of pages for documents associated with a docket entry is a new option.

Knowing how big a file is helps PACER users predict the cost of viewing an attachment and also to anticipate the loading time of a document.

ECF Bankruptcy Adversary Query Reports

Docket Sheet

Case number

Filed to

Entered to

Documents to

Include:

- Terminated parties
- Links to Notices of Electronic Filing
- Page counts for documents

Document options:

- Include headers when displaying PDF documents
- View multiple documents
- Create Appendix

Include on the Docket Sheet:

- all docket entries in this case
- selected docket entries only

Include PDF documents

Filing Date	#	Docket Text
03/01/2010	1 (4 pgs; 2 docs)	Chapter 13 Voluntary Petition - Receipt Number cc, Fee Amount \$274 Filed by Jerry J. Heberline , Susan W. Heberline Employee Income Record Due:3/15/2010. Statement of Financial Affairs due 3/15/2010. Incomplete Filings due by 3/15/2010. (JPW) (Entered: 03/01/2010)
03/03/2010	2 (1 pg)	Motion to Avoid Lien with First Westside Bank Filed by Jeanne L. Walker on behalf of Debtor Jerry J. Heberline , Joint Debtor Susan W. Heberline (JPW) (Entered: 03/03/2010)
03/03/2010	3 (1 pg)	Order Granting Motion To Avoid Lien (Related Doc # 2) Signed on 3/3/2010. (JPW) (Entered: 03/03/2010)
03/03/2010	4 (1 pg)	Motion to Avoid Lien on Household Goods under Section 522(f)(1)(B)(i) Filed by Jeanne L. Walker on behalf of Debtor Jerry J. Heberline , Joint Debtor Susan W. Heberline (JPW) (Entered: 03/03/2010)

Critical Deadlines and Dates on the Docket Report

Additional dates and deadlines now display on the caption of the docket report. A link to the Claims Register appears whenever a case has claims filed.

The following dates will be shown, if appropriate:

Plan confirmed date	Deadline for filing government claims
341 meeting date	Deadline for objecting to discharge
Deadline for filing claims	Deadline for financial management (Chapter 7 only)

Except for the deadline for filing claims, all deadlines will display the most recent date whether or not it is terminated.

ECF Bankruptcy Adversary Query Reports Utilities Search Logout

U.S. Bankruptcy Court
SDSD (Pleasantville)
Bankruptcy Petition #: 12-10019

Assigned to: Charles Anderson
Chapter 13
Voluntary
Asset
[Show Associated Cases](#)
[Claims Register](#)

Date filed: 02/06/2012
Plan confirmed: 02/07/2012
341 meeting: 03/12/2012
Deadline for filing claims: 06/11/2012
Deadline for filing claims (govt.): 08/06/2012

Debtor
J. Robert Hunnington
1824 North Park Avenue
San Antonio, TX 78223
BEXAR-TX
SSN / ITIN: xxx-xx-2435

represented by **Charles G. Arrington**
Huffman, Arrington, Kyle and Dunn
1267 Central Avenue
#100
San Antonio, TX 78233
210-555-4444

Joint Debtor
Marie C. Hunnington
1824 North Park Avenue
San Antonio, TX 78223
BEXAR-TX
SSN / ITIN: xxx-xx-3524

represented by **Charles G. Arrington**
(See above for address)

Calendars and 341 Meeting

A user can now view All Hearings without the 341 Meeting settings included in the report. A 341 Meeting selection has been added to the hearing type list.

The daily and monthly calendars and the deadlines and hearings report also have this new 341 Meeting option.

Query

New query options have been added:

- Filed Date range,
- Last Entry Date range
- Nature of Suit

If multiple Natures of Suit are selected for a query, CM/ECF displays a message that the search could produce many records and lead to a large billing charge.

As an enhancement to the PACER Case Locator a limited query display has been included for mobile device use [**Mobile Query**]. This 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 will now direct users to this new interface.

[Query](#) [Help Desk: \(503\) 326-1510 \(541\) 431-4005 Toll Free \(866\) 777-0442](#) [Info](#) [LBFs](#) [Comments](#)

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

Search Clues [Mobile Query](#) 

Case Number	<input type="text"/>		
Last / Business Name	<input type="text"/>	(Examples: Desoto, Des't)	
First Name	<input type="text"/>	Middle Name	<input type="text"/>
SSN / ITIN	<input type="text"/>	Tax ID / EIN	<input type="text"/>
Type	<input type="text"/>	<input type="checkbox"/> Open cases	<input type="checkbox"/> Closed cases
Filed Date	<input type="text"/>  to <input type="text"/> 		
Last Entry Date	<input type="text"/>  to <input type="text"/> 		
Nature of Suit (AP and MP cases only)	<input type="text"/> 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) 12 (Recovery of money/property - 547 preference)		

In addition, a **View Document** option has been added to the Query menu which allows a user to enter a document number and view only that document, thus avoiding the expense of running a docket report in order to view a document.

Notice of Electronic Filing

In prior releases, when an attorney represented more than one party in a case, the attorney's email and party information were listed on the Notice of Electronic Filing (NEF) only for the first party. Now the attorney is listed for each party represented.

Although an attorney may be listed multiple times on an NEF, the system will not send multiple emails.

Cases Report

Type of debtor, nature of debt, nature of business, and county has been added to the selection screen. Users can also search for cases without a confirmed plan.

Cases Report [Help Desk](#): (503) 326-1510 (541) 431-4005 Toll Free (866) 777-0442 [Info](#) [LBFs](#) [Comments](#)

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

Office	<input type="text" value="Portland"/> <input type="text" value="Eugene"/>	Assets	<input type="text"/>	Case Type	<input type="text" value="ap"/> <input type="text" value="bk"/>	Chapter	<input type="text" value="7"/> <input type="text" value="9"/>
Trustee	<input type="text" value="Almasie, Kim"/> <input type="text" value="Amborn, Candace"/>						
Attorney							
Last name	<input type="text"/>						
First name	<input type="text"/>						
Bar ID	<input type="text"/>						
Date Type	<input type="text" value="Filed date"/>	From	<input type="text" value="3/6/2013"/>	to	<input type="text" value="3/6/2013"/>		
<input checked="" type="checkbox"/> Open cases			<input type="checkbox"/> Party information				
<input type="checkbox"/> Closed cases			<input type="checkbox"/> Pro se cases only				
<input type="checkbox"/> Voluntary	<input type="checkbox"/> Involuntary	<input type="checkbox"/> Small Business Cases					
Type of Debtor	<input type="text"/>	Nature of Debt	<input type="text"/>	Nature of Business	<input type="text"/>		
County	<input type="text" value="BAKER-OR"/> <input type="text" value="BENTON-OR"/>						
Number of months without a confirmed plan		From	<input type="text"/>	To	<input type="text"/>	<input type="checkbox"/> Include dismissed cases	
Sort by		<input type="text" value="Filed Date"/>	<input type="text"/>	<input type="text"/>			
Output Format							
<input checked="" type="radio"/> Formatted display							
<input type="radio"/> Data only <input type="checkbox"/> Include field descriptions							
<input type="button" value="Run Report"/>	<input type="button" value="Clear"/>						

Claims Register

Two new selections are available when viewing the claims register: Claims Summary Report and View Multiple Documents.

Claims Register Help Desk: (503) 326-1510 (541) 431-4005 Toll Free (866) 777-0442 [Info](#) [LBFs](#) [Comments](#)

Case number: 3:12-bk-30075

Creditor type: Creditor Creditor number: []

Creditor name: []

Claim number: [] to [] View multiple documents

Filed Entered 1/1/1990 to 3/6/2013

Sort by: Claim Number Filed Date

View claims summary report

Run Report Clear

Claims Summary Report

The Claims Summary Report gives the viewer a snapshot overview of the claims for the case by producing a condensed list of claims.

Claims Summary Help Desk: (503) 326-1510 (541) 431-4005 Toll Free (866) 777-0442 [Info](#) [LBFs](#) [Comments](#)

[12-30205-rld13 Frank N. Stein, Jr. and Bella Stein](#)

Type: bk Chapter: 13 Office: 3 (Portland)
 Assets: y Judge: rld
 Date Filed: 04/19/2012 Last Date to File Claims: 08/20/2012 Last Date to File (Govt):
 Trustee: Wayne Godare

Claim #	Amount claimed *	Date filed	Creditor number	Creditor name
1-2 View	\$3333.00	05/14/2012	1835045	Bobby's BBQ Emporium
2 View	\$45000.00	04/19/2012	1835046	Bobby's BBQ Emporium
3-2 View	\$55555.00	05/14/2012	1835019	GMAC

Total Number of Claims: 3

Hovering your cursor over the amount claimed will display a breakdown of the claim amounts. The View hyperlink displays more detailed information for this claim on the claims register. Click the creditor name to view claimant address or transfer information. The user can sort the report by clicking the column headers. This reformatted summary can be especially helpful for sorting by creditor name.

View Multiple Documents

The user can now view multiple documents from the Claims Register in one PDF file. This is the same functionality as View multiple documents on the Docket Report. This feature will enable the user to generate selected PDF claims with any related attachments in one PDF document.

The Claims Register will include a checkbox next to each claim, claim attachment, or claim related proceeding to customize this document. Each PDF selected will be combined into one large PDF file. The user can view or print all claims on a case or all PDF documents from certain creditors if desired.

The screenshot shows the CM/ECF Claims Register interface. At the top, there is a navigation bar with links for Bankruptcy, Adversary, Query, Reports, Utilities, Search, and Logout. The main heading is "SDSD Claims Register" for case "11-10004 Clinton H. Vesperman and Anna C. Vesperman". Below this, case details are listed: Judge: Lillian Strasberg, Chapter: 13, Office: Pleasantville, Trustee: Kathleen Nelson, Last Date to file claims: 07/07/2011, and Last Date to file (Govt): 09/06/2011. There are "Select All" and "Clear All" buttons. The claim entry for "Ace Finance" (Claim No. 1) is shown with its original and entered dates, status, and filer information. Below the claim details, the "History" section lists three events: the initial filing of the claim, a transfer of the claim to Ecast Settlement Corporation and then to Pioneer Funding group, and a notice of mortgage payment change filed by the debtor.

Transfers of Claim

Effective May 1, 2013, a Transfer of Claim filing fee (\$25 per claim transferred) will be assessed. The Internet Payments Functionality in CM/ECF has been modified to allow for electronic collection of the new Claims Transfer Filing Fee.

ePOC

Electronic Proof of Claim (ePOC) is an application to allow filing of a Proof of Claim without requiring an ECF login and password. ePOC will allow the user to create, amend and withdraw a Proof of Claim in any chapter. The interface will produce the Official Bankruptcy Form B10 and permit supporting documents to be attached. Please check our web site on April 15 for links to ePOC.

Case Opening

Multiple SSN/TIN

CM/ECF now allows up to five social security numbers and five tax identification numbers for each debtor and joint debtor.

After a social security number is entered a plus icon appears beside the SSN/TaxID/EIN field. If the debtor or joint debtor has another SSN/TaxID/EIN, click the “plus” icon for another field to be displayed for additional number(s). CM/ECF will now format the numbers if hyphens aren’t inserted.

All SSN and TaxID/EIN numbers have been included in all reports and functions throughout the application:

On public notices and docket sheets only the last four digits of any social security or identification numbers are displayed.

Prior Filings

When using Open BK Case for a new filing, ECF will search for prior cases filed which used the same SSN as the current filing. If any cases are found, these will be displayed on the Statistics screen.



The screenshot shows the 'Open New Bankruptcy Case' form. At the top, there is a header with the title 'Open New Bankruptcy Case' and contact information: 'Help Desk: (503) 326-1510 (541) 431-4005'. Below the header, a red-bordered box contains the message: 'It appears that this debtor filed case [09-60043-tmr13](#)'. Underneath this message, there are several dropdown menus for form completion: 'Prior filing within last 8 years' (set to 'yes'), 'Fee status' (set to 'Paid'), 'Nature of debt' (empty), 'Asset notice' (set to 'No'), 'Estimated number of creditors' (empty), 'Estimated assets' (empty), and 'Estimated liabilities' (empty).

Open Related BK

CM/ECF has introduced a new feature that assigns the same judge to related filings at case opening. A new option has been added to the Bankruptcy menu entitled, "Open a Related BK Case." This option allows the filer to indicate the related case already in the system before entering the new case information.

Related cases are cases in which a debtor is related to a debtor in another case as a spouse, partner, shareholder (except of a publicly traded company), LLC or other affiliate; where one debtor is a closely held corporation, limited liability company, or a partnership, and the other debtor is a partner, shareholder or member of the debtor; or any time the legal or financial relationship of the parties makes it appropriate to have the case assigned to the same judge.

As the case progresses, the judge may formally consolidate or jointly administer these cases. However, related cases are not included in that classification at the beginning of the case.

Since these cases share an association, the docket report will have a hyperlink to the associated cases query and show the related case association type.

Query	Reports	Utilities	Search
12-10080 George T. Spence Case type: bk Chapter: 7 Asset: No Vol: v Judge: Lillian Strasberg Date filed: 07/16/2012 Date of last filing: 07/16/2012			
Associated Cases			
Case	Associated Case	Type	
12-10080 George T. Spence	12-10082 United Health Services	Related	
12-10080 George T. Spence	12-10083 United Medical Services	Related	

Attorney and Party Association

When an attorney or trustee files a pleading, the user is prompted to indicate whether s/he should be linked to the party represented. In prior releases, the checkbox for the association with the attorney and party was unchecked and if the filer did not check the box, the association was not made. The checkbox for the association with the attorney and party is now checked by default. The message has been updated to reflect the implications of omitting this necessary association. If the box is unchecked, the attorney will not get added to the case for noticing or shown in queries and will not appear on or receive the Notice of Electronic Filing.

 Bankruptcy ▾ Adversary ▾ Query Reports ▾ Utilities ▾ Search Logout 			
File a Motion:			
12-10042 Billy Cameron			
Type: bk	Chapter: 13 v	Office: 1 (Pleasantville)	
Assets: y	Case Flag: PlnDue		
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.			
<input checked="" type="checkbox"/> First Car Loan, (pty:cr) represented by Mason, Perry P. (aty)			
<input type="button" value="Next"/>	<input type="button" value="Clear"/>		

Password Recovery

ECF login page will now have a link to help the user reset an ECF or PACER password if forgotten. The user must know his/her ECF login or the email associated with his/her ECF user account. The link to the reset will be emailed to the user at the user account email address.

Instructions for filing:

Enter your CM/ECF filer login and password if you are electronically filing something with the court.

Authentication

Login:
Password:
Client code:

IMPORTANT NOTICE OF REDACTION RESPONSIBILITY
compliance with [Fed. R. Bankr. P. 9037](#). This requirement applies to all filings.

I understand that, if I file, I must comply with the redaction requirements.

If you have lost or forgotten your CM/ECF password, [click here](#), for Pacer [click here](#).

Login

Clear