

Bankruptcy ECF Release 4.1 for Attorneys, Trustees and Creditors

Introduction

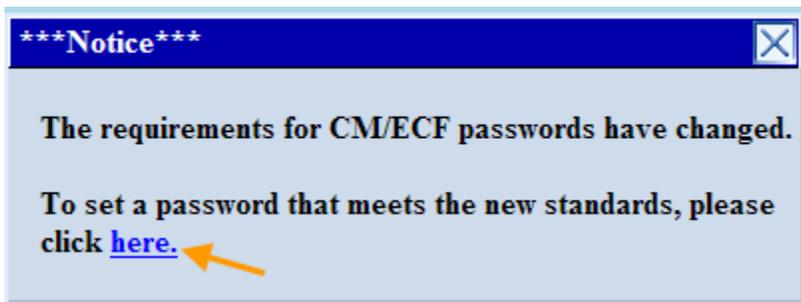
This document summarizes the changes you will notice when ECF has been updated to Release 4.1. The titles in red indicate what differences you will see based on the type of user you are.

Internet Browsers - **ALL USERS**

- Release 4.1 was tested and works correctly with Firefox 3.5 and Internet Explorer 7 and 8; Mozilla Firefox 2 and Internet Explorer 6 are no longer supported.

Password Security - **ALL USERS**

- Password security has been improved. All ECF passwords must be a minimum of 8 characters, and must include both upper- and lower-case alphabetic characters and at least one digit or special character [e.g., 0-9, @, #, \$, %, &, *, +, :].
- The **first time you log in**, you will see the following message:



- Click the link within the message to change your password. If your password complies with the new requirements, you may re-enter it as a new password.
- Additionally, after five invalid login attempts, your account is locked out for a five-minute waiting period. Each subsequent invalid entry increases the resulting lockout period.

Maintain Your ECF Account (E-Mail Notification) – **ALL USERS**

- You now have the option through “Maintain Your ECF Account” to choose whether you want notification of bankruptcy matters when your appearance is only entered in the Adversary Proceeding.

- Send notices for adversary proceedings in which I am directly involved and for their related bankruptcy cases
- Send notices for adversary proceedings in which I am directly involved but not for their related bankruptcy cases

Secondary Email Addresses - ALL USERS

- Users will be required to enter any changes to primary and secondary email addresses twice for validation purposes. If you wish to have more than one secondary email address, you must separate the addresses by a comma.

Email information for Rick J. Thompson			
Primary email address	<input type="text" value="rick_thompson@mdb.uscourts.gov"/>	Reenter primary email address	<input type="text" value="rick_thompson@mdb.uscourts.gov"/>
Secondary email address	<input type="text" value="rt123@123.com, rickt@gmail.com"/>	Reenter secondary email address	<input type="text" value="rt123@123.com, rickt@gmail.com"/>

Opening an Adversary Proceeding – ATTORNEYS/TRUSTEES

- The Opening of an Adversary Proceeding and the filing of the Complaint have been combined into one entry. See the ECF Manual on the Court’s website for step by step instructions.
- Previously, an attorney opening an adversary proceeding was prompted to create an association with the plaintiff. Now, the association of the attorney with the plaintiff is made automatically.
- In previous versions of ECF, the filer was able to add the defendant’s attorney to the case while adding the defendant. Now, the Attorney opening the adversary will not be able to add the attorney for the defendant.

Claims/Creditors - ALL USERS

Claim Filing – Proof of Claim

- Proof of Claim notices/receipts previously did not show the types of claim amounts requested. Now the amounts provided are as follows: Amount Claimed, Amount Secured, Amount Priority.
- The “File another claim” hyperlink was previously displayed at the bottom of the Proof of Claim receipt. Now the hyperlink has been moved to the top of the receipt for easier access.
- The Proof of Claim entry screen has been formatted to match the B10 claim form. The Amount Claimed will no longer calculate an automatic total as the filer may have General Unsecured amounts which will no longer have a field for input. Filers must be certain to enter the total Amount Claimed.

Claimed		
Amount Claimed <input type="text"/> <i>Enter the Total Amount of Claim as of Date Case Filed (incl. secured, priority, general unsecured & unknown)</i>	Secured <input type="text"/> <i>If all or part of your claim is secured, enter the secured amount (Box 4 on claim)</i>	Priority <input type="text"/> <i>If all or part of your claim is entitled to priority, enter the priority amount (Box 5 on claim)</i>

Claims Activity

- For any closed case, the case closed date is displayed next to the case number on the report output.
- Previously, when a claim was transferred via a Transfer Agreement, the filer to whom the claim was transferred was listed as the filer of the original claim. This was incorrect, and inconsistent with the information displayed on the Claims Register. Now the original filer name is displayed for the original claim, and the filer to whom the claim was transferred is listed for subsequent claim actions.

Claims Register

- The Claims Register Summary has a new display which will no longer include Unsecured/Unknown amounts.
- Previously, the “Entered by” field displayed the original filer, even if a more recent claim amendment or part was entered by a different user. Now the “Entered by” field displays the filer of the most recent claim record.

Query - **ALL USERS**

- When a name search is made, additional information is now displayed on the results page to allow a user to select the correct case.
- For each name result, a row of information is displayed to the screen for each case in which that person is involved, as shown below:

Select a Case						
There were 5 matching persons.						
There were 5 matching cases.						
Name	Case No.	Case Title	Chapter / Lead BK case	Date Filed	Party Role	Date Closed
Green, Valerie (pty) (1 case)	02-59757-KCF7	Valerie Green	7	09/30/02	Debtor	01/15/03
Green, Valerie L. (pty) (1 case)	00-51302-RTL	Cornelius Green and Valerie L. Green	13	02/09/00	Debtor	02/10/03
Green, Valery J. (pty) (1 case)	99-15931-GMB	Valery J. Green	13	06/28/99	Debtor	N / A
Greene, Valerie A. (pty) (1 case)	01-13362-1-JHW	Richard W. Petravich and Valerie A. Petravich	13	04/03/01	Debtor	11/29/01
Greene, Valerie A. (pty) (1 case)	02-11264-1-JHW	Richard W. Petravich and Valerie A. Petravich	7	02/08/02	Debtor	08/26/02

Reports – ALL USERS

Cases Report

- An option to filter the report by attorney name or Bar ID now appears on the selection screen. When a name is entered, a list of matching attorney names is displayed, of which you may select one or more. Check boxes allow you to search for attorneys by party role: debtors, plaintiffs, defendants, creditors, or all. Alternatively, you can choose to view only cases with pro se filers.

- The report is now limited to a range of 31 days. This prevents internet users from unintentionally requesting a large data set, which would result in an unnecessarily large PACER fee.
- For users who do not have access to sealed cases, limited sealed case information is displayed on the Cases report. This report displays the case number, entered and filed dates, office, and generic case title text according to case type: “SEALED” for bankruptcy cases, “SEALED v. SEALED” for adversary and miscellaneous proceedings. Note that the fields displayed are the only fields by which sealed cases may be filtered; if other search filters are used (e.g., chapter, judge), those filters will not affect which sealed cases appear on the report.

Docket Activity

- The report is now limited to a range of 31 days. This prevents internet users from unintentionally requesting a large data set, which would result in an unnecessarily large PACER fee.

Docket Report

- The county of residence is now displayed along with the address information on the report output for debtors and joint debtors.

Miscellaneous – ‘Enter’ Key Function – ALL USERS

- If you wish to use the keyboard rather than the mouse, pressing the Enter key now gives the same result as clicking the button which submits the screen. Pressing the Space Bar also works if the focus is on the button which submits the screen.

Note: This key action was previously available on a number of screens throughout the application, but has been enhanced to be available on all screens.

Noticing – ALL USERS

- The BNC Certificate of Notice now includes all entities selected as form recipients who received a Notice of Electronic filing through ECF, along with the date of electronic notification and the entity's name and email address. Additionally, the BNC file now contains an email address (for the debtor's attorney), so that the BNC may email the bypass list.

FEES/PAYMENTS DUE - ATTORNEYS and TRUSTEES

Internet Payments Due

- Previously, when an internet payment was made, all fees incurred up to the time of payment had to be paid at once. Now you may choose to pay some or all of the fees in a given transaction. Note that a user will still be locked out if any fees are not timely paid.
- To avoid problems with pop-up blockers among various browsers, the pop-up window previously generated by a Pay.Gov transaction is now displayed as a panel. This panel appears as a part of the original application window and is no longer affected by pop-up blocker settings. In order to view the NEF after payment of fees, the user will need to view the NEF received as email or view the NEF on the docket report as the payment screen does not return the user to the NEF.
- On the "Internet Payments Due" screen, all outstanding fees are displayed, along with a check box for each fee. To select the fees to pay, the user should check the boxes next to the desired fees, then click the *Next* button.

Internet Payments Due

Select all

Check Fees to Pay	Date Incurred	Description	Amount
<input type="checkbox"/>	2008-07-22 08:29:23	Voluntary Petition (Chapter 7)(08-10079-7) [caseupId,1027u] (200.00)	\$ 200.00
<input type="checkbox"/>	2008-07-25 12:25:50	Voluntary Petition (Chapter 7)(08-10082-7) [caseupId,1027u] (200.00)	\$ 200.00
<input type="checkbox"/>	2009-08-31 09:33:34	Voluntary Petition (Chapter 7)(09-01092) [misc,volp7a] (200.00)	\$ 200.00

Next Clear

Tracking Filing Fee Balance – ATTORNEYS AND TRUSTEES

- In previous releases, there was no way to track the balance due when a filing fee was paid in installments. Now, for pending cases, the outstanding filing fee balance is tracked in ECF. **(NOTE:** This is applicable only for cases that are opened after upgrade to Release 4.1).

- From the Query screen, a new “Filing Fee” selection is available. For bankruptcy cases, this option displays a screen listing the filing fee amount, details on any payments that have been made, and the outstanding balance due. An additional section displays any related adversary proceedings with deferred filing fees.

Original filing fee: \$ 299.00

The fee status is paying in installments.

Date	Doc	Summary Text	Receipt number	Fee
07/25/2011	1	Chapter 7 Voluntary Petition - case upload	277964	\$ 30.00
				Balance Due \$ 269.00

Filing Fee due in Adversary Cases

Case	Associated Case	Type	Flag
11-30404-rld7 Debbie N. Debtor, Jr.	11-03143-rld Trustee7 v. Defendant	Adversary	DEFER

- For adversary proceedings, the “Filing Fee” query displays the case opening fee and the balance due (if the filing fee was deferred).

Filing Agents – ATTORNEYS AND TRUSTEES

- Attorneys and trustees can now create special logins for employees who file in ECF on their behalf. A Filing Agent may be linked to multiple attorneys/trustees, and attorneys/trustees may have multiple Filing Agents.
- Only the Attorney or Trustee name will appear on the docket. Transactions made by Filing Agents can be viewed in Utility/View Your Transaction Log.
- The creation or editing of a Filing Agent record is accomplished via the attorney or trustee person record found in Utility/Maintain Your ECF Account.
- Because Filing Agents may work with multiple filers, Filing Agents are not able to associate a default PACER login with the Filing Agent user account and will be required to login to PACER each time to view a Report or make a query.
- Filing Agents will not automatically receive NEFs. If a filer would like to establish noticing for a Filing Agent, the filer must add the Filing Agent’s email address to the email information in the Maintain Your ECF Account utility.
- For further instructions and to view an Electronic Learning Module, click this link to the court’s online manuals: [Using Filing Agents](#)