Utilities

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Introduction



"Utilities" is one of the main items on the blue banner Main Menu (see above) that appears immediately after a user logs in. By using "Utilities", users can manage their ECF and PACER accounts, obtain access to case mailing information, and verify the filing and authenticity of electronically filed documents. The options which appear after the user clicks on "Utilities" are listed below.

		Pacer Case Locator (National Index)	
Your Account	Miscellaneous	Links to Other Courts	NextGen Items
Maintain Your Login/Password	Mailings		Link a CM/ECF account to my PACER account
Change Your Client Code	Verify a Document		
Change PACER Exemption Status			
Internet Payment History	Court Information		
Internet Payments Due			
Maintain Your ECF Account			
Review Billing History			
View PACER Account Information			
View Your Transaction Log			
(5)			

Maintain Your Login/Password

This option redirects you to the PACER site to change your login and/or password.

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.

Change Your PACER Exemption Status

Trustees and CJA attorneys who use a single PACER login for both exempt and non-exempt PACER usage can toggle between these two modes.

Internet Payment History

This option will allow you to review internet payments made for a specified time period.

Internet Payments Due

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

Maintain Your ECF Account

This function allows you to update your personal information and instructions about e-mail notification.



To edit your name and address information, click the link at the top right of this screen. After logging into PACER, you will arrive at Manage My Account.

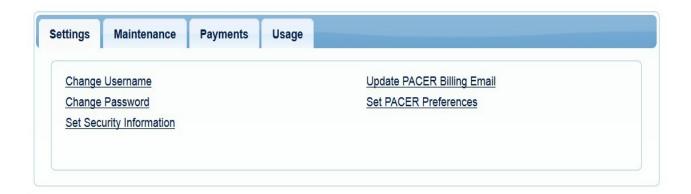
MANAGE MY ACCOUNT

Welcome, Qunicy Attorneyorb

Logout

Account Number 7030774
Username orbtester55
Account Balance \$0.00
Case Search Status Active

Account Type Upgraded PACER Account



Click on the Maintenance tab to update your name, address, or telephone number.



Click the **Update E-filer Email Noticing and Frequency** option to update your <u>primary</u> email address for Notifications of Electronic Filing (NEFs). To update your <u>secondary</u> email address(es) for NEFs, return to the Maintain Your ECF Account option in the Utilities menu of CM/ECF and click on the **Email information** button.

	Email information for QU	JINCY ATTORNEYORB						
	Primary email address	1orbtester+56@gmail.com		Update my primary email address				
	Secondary email address			Reenter secondary email address				
			.il					
	Send the notices specified	below						
	✓ to my primary em	ail address						
	to the secondary a	ddresses						
	- 100 							
	✓ Send notices in cases i	in which I am involved						
	Send notices in these a	additional cases	.d					
	• Send notices for adversary proceedings in which I am directly involved and for their related bankruptcy cases							
	O Send notices for adversary proceedings in which I am directly involved but not for their related bankruptcy cases							
	You may receive notices for some bankruptcy cases if it is required by the Clerk of Court.							
	O Send a notice for each	filing						
	• Send a Daily Summan	ry Report						
Format notices HTML								
	O Text							
	Return to Account screen	Clear						

- The e-mail information for your account appears.
- **Update my primary e-mail address** This will return you to the Maintenance tab in PACER described above.
- Secondary email address Enter one or more secondary email addresses, and click the to the secondary addresses box under Send the notices specified below. Click

Return to Account screen at the bottom of the screen, and click **Submit** on the main screen.

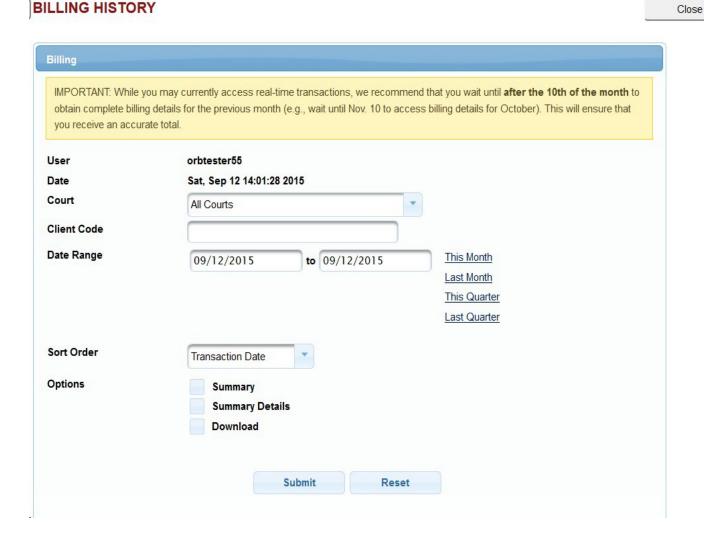
- To receive notices for a case in which you are not involved, check the box for **Send notices in these additional cases** and enter the case number(s) in the text box.
- To receive notices for adversary proceedings, select Send notices for adversary proceedings which I am directly involved and for their related bankruptcy cases or Send notices for adversary proceedings in which I am directly involved but not for their related bankruptcy cases.
- Select to receive a **notice for each filing** or a **Daily Summary Report.**
- Format notices Select appropriate format.
- Click **Return to Account screen** and select **Submit** to effect the change(s).

Click the **More user information** to add filing agents. See separate procedure for **Using Filing Agents**.

This screen also has a link entitled **Update Account Information** which takes you to the Maintenance tab under Manage My Account in PACER. This will enable you to update your username, password, personal information, and address.

Review Billing History

This option takes you to PACER and allows you to display the number of ECF pages accessed and charges incurred for the PACER account you are currently using for a specified period of time.



View PACER Account Information

This option displays the current PACER login name and current client code, if any, which you used to log in.

View Your Transaction Log

This option displays details of all transactions (filing of documents, order upload, etc.) in CM/ECF for you and any filing agents within a specified date range.

A list of all your transactions in ECF during the specified dates displays. [**NOTE**: If the transaction log is lengthy, you can press <Ctrl> <F> on your keyboard (or click on "Find (on This Page)" from the "Edit" menu on your browser) to bring up a search window.

Mailings . . .

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

<u>List of Creditors</u> - Displays the service list for a case, including parties and attorneys as well as creditors. If a party or creditor has registered a preferred address with the National Creditor Registration Service, or the address has been corrected through an interface with the United States Postal System, these changes will be identified. Undeliverable and duplicate addresses are also flagged.

- 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 (*i.e.*, not an adversary case) in YY-NNNNN format.
 - Special Mailing Group Leave the default at blank [none]. Special mailing groups have been set up by the court to add entities such as the U.S. Attorney General, Oregon Department of Revenue, and Division of Child Support to certain case notices.
 - **Format** Select either a "3 columns" format or a "raw data format" (pipedelimited).

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

Note: This lists creditors, debtors, any debtor's attorney, the trustee, and the U.S. Trustee, but <u>it does not include attorneys for other parties</u>. [**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.]

<u>Mailing Info for A Case</u> - Displays a list of those who receive e-mail notices and those who require manual noticing. The latter list may not be complete.

<u>Mailing Matrix by Case</u> - Displays the entire mailing list for a case in label format. Use this option and accept the default of "All" to ensure service on all parties, creditors, and attorneys.

STEP 1. Click on Utilities and, under the Miscellaneous menu, click on Mailings... then, click the Mailing Matrix by Case hyperlink.

- Enter the case number of the bankruptcy case (*i.e.*, not an adversary case) in YY-NNNN format.
- Check the box in front of "All" to select all parties, creditors, and attorneys for the case, or select one or more of the participants/groups in the case from the available selections . **NOTE:** Clicking on one or more of the individual selections while holding down the <Ctrl> key will deselect the ALL category and give you a listing of only those participant group(s) selected.
- The only print format available is "3 column".

STEP 2. Click Next to continue or Clear to reset the options.

Note: Any preferred address registered by the creditor with the Bankruptcy Noticing Center is displayed, along with the address originally submitted by the debtor. No PACER charges are incurred for this matrix. If the default "All" is selected, all parties and creditors and their attorneys are included. It is also possible to narrow the label selection to certain parties, creditor committee members, only creditors who have filed claims, etc. In addition, all duplicate and undeliverable addresses are identified clearly on the mailing label sheet in order to reduce unnecessary notices by ECF filers. [**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.]

Verify a Document

This option allows you to verify that a document has been filed.

- 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 YY-NNNNN format for bankruptcy cases and YY-NNNN format for adversary cases.
- **STEP 3.** Enter the document number you wish to verify.
- STEP 4. Click Next or Clear to reset.

- **STEP 5.** If the case and document numbers 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 document.
 - File size is The size of the document in bytes is displayed. [NOTE: 1,048,576 bytes = 1 megabyte (MB).]
 - 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.]
 - **Verified Signature(s)** States whether the original and verified signatures are the same or different.

Court Information

This provides various information about the court include maximum PDF size, version of CM/ECF in use, RSS feed, contact information, and flags.

PACER Case Locator (National Index)

Clicking on this link will open a new window for the Case Search/Party Search screen of the PACER Case Locator. If your browser blocks pop-ups, either set *.orb.uscourts.gov as a site that your browser will not block or click on the link "click here instead".

Links to Other Courts

Clicking on this link will open a new window for the PACER Court Links page where you may navigate to another court's ECF or PACER site without logging out of the Oregon Bankruptcy ECF session. If your browser blocks pop-ups, either set *.orb.uscourts.gov as a site that your browser will not block or click on the link "click here instead".

Link a CM/ECF Account to My PACER Account

When a court upgrades to NextGen CM/ECF, this menu option provides the way to link your upgraded PACER account to your CM/ECF account. After you have linked these two accounts, you will no longer need your CM/ECF login and password for this court; you will use your PACER username and password to electronically file in this court.

After successfully linking your accounts, click on Query, Reports, Utilities, or Search. The Bankruptcy and Adversary Menus display and you may now proceed to file documents with the court.