

# 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”, the user can manage his or her 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.

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

### 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.

**Maintain User Account** [Edit my name and address information](#)

<b>Last name</b> ATTORNEYORB	<b>First name</b> QUINCY
<b>Middle name</b>	<b>Generation</b>
<b>Title</b>	<b>Type aty</b>
<b>Office</b>	<input type="checkbox"/> Add Headers to PDF Documents
<b>Address 1</b> 888 W Main St	<b>State</b> OR
<b>Address 2</b> Ste 200	<b>County</b> CLACKAMAS-OR (41005)
<b>Address 3</b>	<b>Zip</b> 97222
<b>City</b> Portland	<b>Fax</b>
<b>Country</b> USA	<b>Text Phone</b>
<b>Phone</b> 503-388-2211	<b>Bar status</b>
<b>Alternate Phone</b>	<b>DOB</b> 05/05/1955
<b>Bar ID</b>	<b>Mail group</b>
<b>Initials</b>	<b>AO code</b>
<b>Person end date</b>	

Email information... More user information...

Submit Clear

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, Quinicy Attorneyorb

Logout

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

Settings Maintenance Payments Usage

<a href="#">Change Username</a>	<a href="#">Update PACER Billing Email</a>
<a href="#">Change Password</a>	<a href="#">Set PACER Preferences</a>
<a href="#">Set Security Information</a>	

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

Settings Maintenance Payments Usage

<a href="#">Update Personal Information</a>	<a href="#">Attorney Admissions / E-File Registration</a>
<a href="#">Update Address Information</a>	<a href="#">Non-Attorney E-File Registration</a>
<a href="#">Update E-Filer Email Noticing and Frequency</a>	<a href="#">Check E-File Status</a>
<a href="#">Display Registered Courts</a>	<a href="#">E-File Registration/Maintenance History</a>

Click the **Update E-filer Email Noticing and Frequency** option to update your primary email address for Notifications of Electronic Filing (NEFs). To update your secondary 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 QUINCY ATTORNEYORB**

Primary email address 1orbtester+56@gmail.com [Update my primary email address](#)

Secondary email address  Reenter secondary email address

Send the notices specified below

to my primary email address  
 to the secondary addresses

Send notices in cases in which I am involved  
 Send notices in these additional cases

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  
*You may receive notices for some bankruptcy cases if it is required by the Clerk of Court.*

Send a notice for each filing  
 Send a Daily Summary Report

Format notices  HTML  
 Text

- 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.

#### **BILLING HISTORY**

Close

**Billing**

IMPORTANT: While you may currently access real-time transactions, we recommend that you wait until **after the 10th of the month** to obtain complete billing details for the previous month (e.g., wait until Nov. 10 to access billing details for October). This will ensure that you receive an accurate total.

**User** orbtester55  
**Date** Sat, Sep 12 14:01:28 2015  
**Court** All Courts  
**Client Code**  
**Date Range** 09/12/2015 to 09/12/2015 [This Month](#)  
[Last Month](#)  
[This Quarter](#)  
[Last Quarter](#)

**Sort Order** Transaction Date  
**Options**  
 Summary  
 Summary Details  
 Download

### 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.

**List of Creditors** - 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" (pipe-delimited).

**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 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.]

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

**Mailing Matrix by Case** - 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-NNNNN 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.