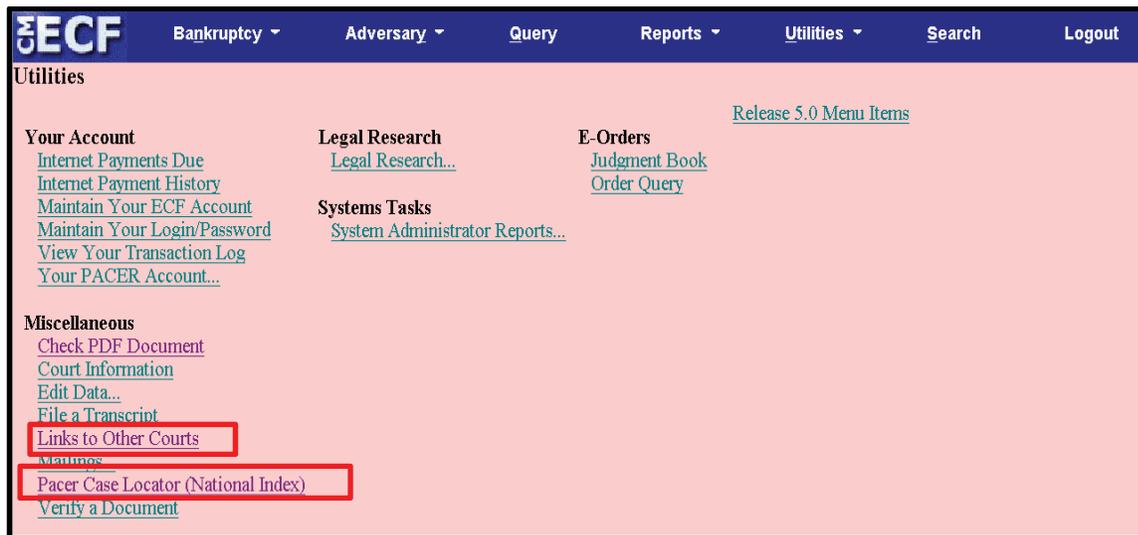


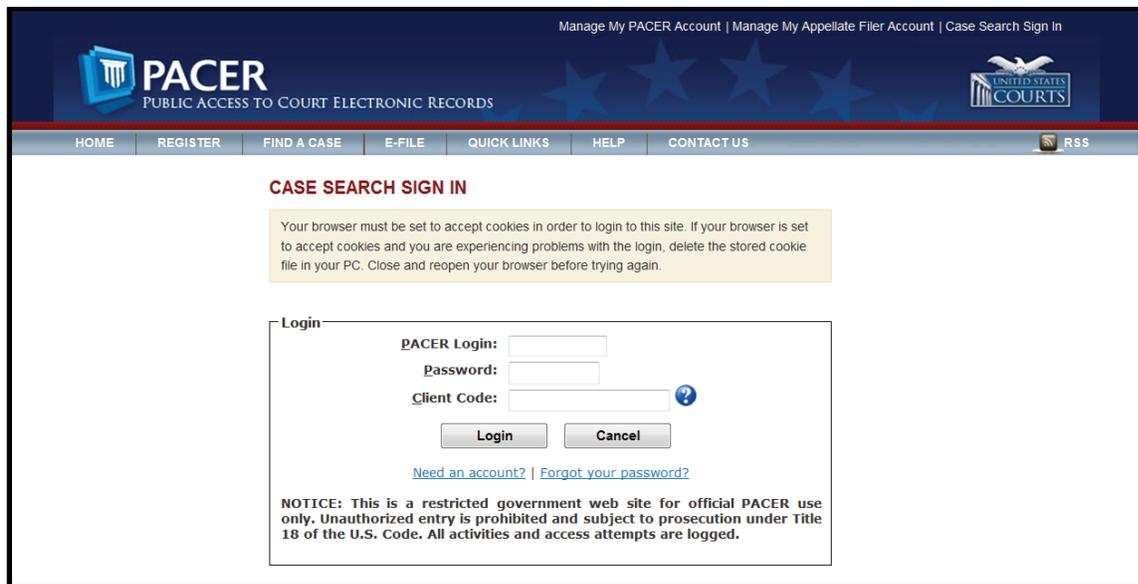
## PACER Links in CM/ECF

Two new menu selections appear under the *Utilities* menu to allow one to navigate quickly between CM/ECF and PACER. You won't have to leave your CM/ECF session to access another court in PACER or to use the PACER Case Locator.



The screenshot shows the CM/ECF Utilities menu. The menu items are organized into sections: 'Your Account', 'Legal Research', 'E-Orders', 'Systems Tasks', 'Miscellaneous', and 'Alerts'. The 'Links to Other Courts' and 'Pacer Case Locator (National Index)' links are highlighted with red boxes. The 'Pacer Case Locator (National Index)' link is also highlighted with a red box.

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



The screenshot shows the PACER Case Search Sign In page. The page features a navigation bar with links for HOME, REGISTER, FIND A CASE, E-FILE, QUICK LINKS, HELP, CONTACT US, and RSS. The main content area is titled 'CASE SEARCH SIGN IN' and includes a message about browser cookies. Below the message is a 'Login' form with fields for PACER Login, Password, and Client Code, and buttons for Login and Cancel. A 'Need an account? | Forgot your password?' link is also present. A notice at the bottom states: 'NOTICE: This is a restricted government web site for official PACER use only. Unauthorized entry is prohibited and subject to prosecution under Title 18 of the U.S. Code. All activities and access attempts are logged.'

## PACER Links in CM/ECF

The following updates have been made to the PACER Case Locator, provided by the PACER Service Center:

- 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.

The [Link to Other Courts](#) displays the Individual Court PACER links without leaving CM/ECF.

The screenshot shows the PACER website interface. At the top, there are navigation links: "HOME", "REGISTER", "FIND A CASE", "E-FILE", "QUICK LINKS", "HELP", and "CONTACT US". The "FIND A CASE" link is highlighted. Below the navigation bar, there is a "FIND A CASE" sidebar with options: "PACER Case Locator", "Court Links", "Search Map", and "Automated Telephone Access". The main content area is titled "INDIVIDUAL COURT PACER SITES" and contains a message: "Click a court below to access an individual PACER or Case Management/Electronic Case Files (CM/ECF) site. If the site you would like to access does not appear on this list, the court may not provide case information to PACER. Visit the respective [court's homepage](#) for more information. (Note: Hover mouse over [icon] to see version.)". Below this message, there are three columns of court links: "U.S. Supreme Court", "U.S. District Courts", and "U.S. Bankruptcy Courts". Each column lists various courts with their respective ECF links and icons for version, RSS, and information.

### Docket Report Enhancements

The Create Appendix option has been modified so you have more flexibility in customizing a docket report. Now you can select only the entries you want and whether you want the PDF document appended to this customized report. Or, if you just want an abbreviated docket report without attached PDF documents, you can select only the entries you need for the task at hand.

The screenshot shows the ECF Docket Sheet interface. At the top, there are navigation tabs: 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 two radio buttons for "Filed" (selected) and "Entered", each followed by a date range selector. Below that is a "Documents" field with a "to" label and another date range selector. The interface is divided into two columns of options. The left column, titled "Include:", has three unchecked checkboxes: "Terminated parties", "Links to Notices of Electronic Filing", and "Page counts for documents". The right column, titled "Document options:", has two unchecked checkboxes: "Include headers when displaying PDF documents" and "View multiple documents". A red-bordered box highlights a section containing a checked checkbox for "Create Appendix". Below this, under the heading "Include on the Docket Sheet:", there are two radio buttons: "all docket entries in this case" (selected) and "selected docket entries only". At the bottom of the red box, there is another checked checkbox for "Include PDF documents" with the instruction "(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.

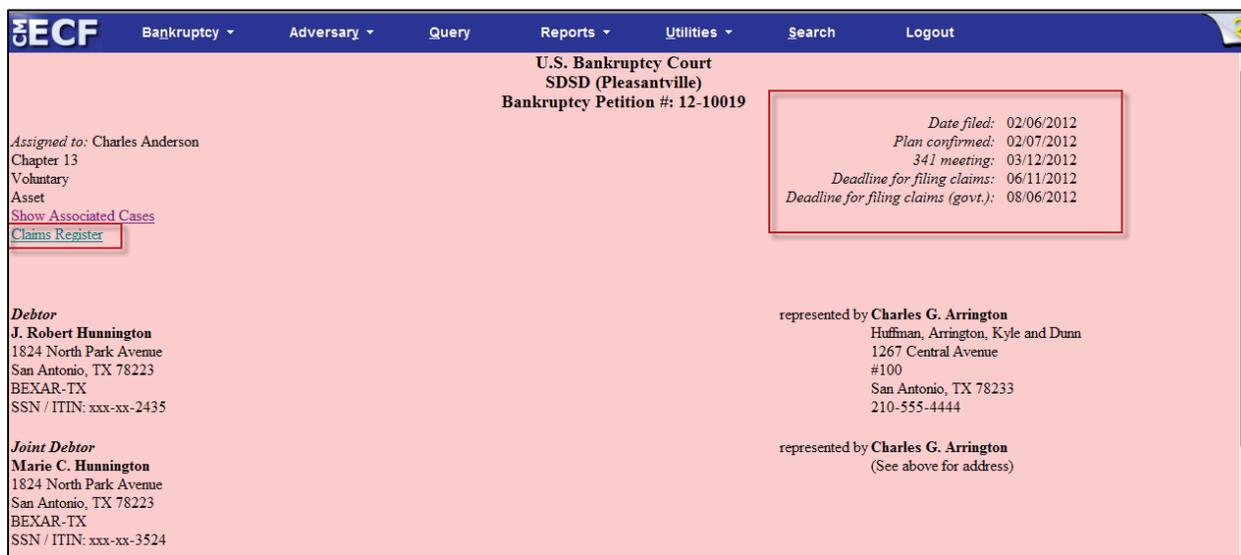
The screenshot shows the ECF Docket Sheet interface. At the top, there are navigation tabs: Bankruptcy, Adversary, Query, and Reports. Below the tabs, the title 'Docket Sheet' is displayed. The interface includes a search section with a 'Case number' field containing '10-10010' and a 'Find This Case' button. There are radio buttons for 'Filed' (selected) and 'Entered', followed by date range selection fields. Below this is a 'Documents' field with a 'to' label. The 'Include:' section contains three checkboxes: 'Terminated parties', 'Links to Notices of Electronic Filing', and 'Page counts for documents' (which is checked and highlighted with a red box). The 'Document options:' section includes 'Include headers when displaying PDF documents', 'View multiple documents', and 'Create Appendix'. Underneath, there is a 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'.

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.

Filing Date	#	Docket Text
03/01/2010	<a href="#">1</a> (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	<a href="#">2</a> (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	<a href="#">3</a> (1 pg)	Order Granting Motion To Avoid Lien (Related Doc # <a href="#">2</a> ) Signed on 3/3/2010. (JPW) (Entered: 03/03/2010)
03/03/2010	<a href="#">4</a> (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, by chapter:

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

The most recent deadline will display whether or not it is terminated.

## Docket Activity Report

The Docket Activity Report has been enhanced to include time filters. The report can be run in time increments, rather than running the report for the entire day. A new clock icon offers an alternative to typing in the time.

**ECF** Bankruptcy Adversary Query Reports Utilities Search Logout

**Docket Activity Report**

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

Case number   Only cases to which I am linked

Office

Case type

Category

Open cases  Closed cases  Summary Text  Full Docket Text

Entered  to

Sort by

Make these options my default

## Calendars and 341 Meeting

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

**ECF** Bankruptcy Adversary Query Reports Utilities Search Logout

**Calendar Events**

Case number

Office

Type

Set  to

AM only  PM only  Both

Time

Sort by

Initial display of related proceedings:  Expanded  Collapsed

Display only proceedings directly related to the calendar event

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.

The screenshot shows the CM/ECF Query interface. At the top, there is a navigation bar with tabs for Bankruptcy, Adversary, Query, Reports, Utilities, Search, and Logout. Below the navigation bar, a warning message states: "Warning: you will be billed for the total number of pages (this report is not subject to the 30-page limit on PACER charges)." The main search area is titled "Search Clues" and contains several input fields: Case Number, Last / Business Name (with examples: Desoto, Des\*t), First Name, Middle Name, SSN / ITIN, Tax ID / EIN, and Type (with checkboxes for Open cases and Closed cases). Below these fields, there are date range selectors for "Filed Date" and "Last Entry Date", each with a calendar icon. A "Nature of Suit" dropdown menu is also present, with options: "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)", and "12 (Recovery of money/property - 547 preference)". At the bottom of the search area, there are "Run Query" and "Clear" buttons.

The Filed Date and Last Entry Date range is limited to 31 days. If a date range entered exceeds the 31 day limit CM/ECF displays an error message.

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



## Multiple Social Security and Identification Numbers

CM/ECF now allows up to five social security numbers and tax identifications 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 you don’t insert hyphens.

The screenshot shows the 'Debtor Information' form in the CM/ECF system. The SSN/ITIN field is highlighted with a red box, showing the number 589-56-8956 and a plus icon next to it, with 999-99-9999 below it. The form includes fields for Last name, First name, Middle name, Generation, Title, Office, Address 1-3, City, State, Zip, County, Country, Phone, Fax, E-mail, and Party text. There are also buttons for Alias, Corporate parent/affiliate, Review, Submit, Cancel, and Clear.

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.

## Multiple Social Security and Identification Numbers

The docket sheet below is an example of how the multiple social security numbers are shown on a public notice.

The screenshot shows the ECF public notice page for a bankruptcy petition. The header includes the ECF logo and navigation links: Bankruptcy, Adversary, Query, Reports, Utilities, Search, and Logout. The main content area is pink and contains the following information:

**U.S. Bankruptcy Court**  
**SDSD (Pleasantville)**  
**Bankruptcy Petition #: 12-10059**

*Date filed:* 05/09/2012

*Assigned to:*  
Chapter 13  
Voluntary  
Asset

**Debtor**  
**Donna Adams**  
120 Sunny Lane  
San Antonio, TX 78956  
BAILEY-TX

represented by **Dayne L. Tracy**  
120 Legal Way  
San Antonio, TX 78259  
Email: [deadmail@support.aotx.uscourts.gov](mailto:deadmail@support.aotx.uscourts.gov)

SSN / ITIN: xxx-xx-8956, xxx-xx-5689, xxx-xx-8956, xxx-xx-8956, xxx-xx-5621

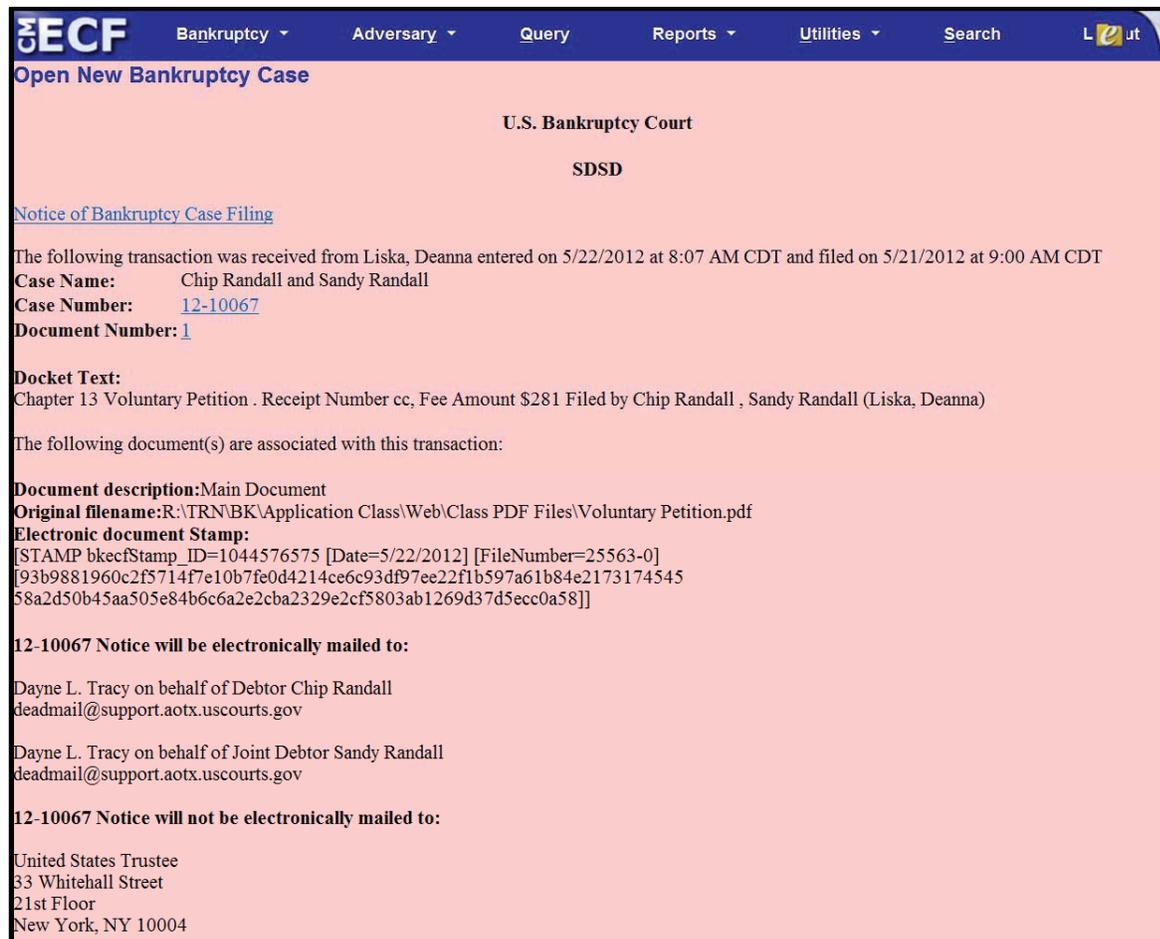
**U.S. Trustee**  
**United States Trustee**  
33 Whitehall Street  
21st Floor  
New York, NY 10004  
212 510-0500

Filing Date	#	Docket Text
	<a href="#">1</a>	Chapter 13 Voluntary Petition . Receipt Number cc, Fee Amount \$281 Filed by Donna Adams (Tracy, Dayne)

## 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 they represent.

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



The screenshot displays the ECF system interface. At the top, there is a navigation bar with the ECF logo and several menu items: Bankruptcy, Adversary, Query, Reports, Utilities, Search, and a user profile icon labeled 'L ut'. Below the navigation bar, the page title is 'Open New Bankruptcy Case'. The main content area has a light pink background and contains the following information:

U.S. Bankruptcy Court  
SDSD

[Notice of Bankruptcy Case Filing](#)

The following transaction was received from Liska, Deanna entered on 5/22/2012 at 8:07 AM CDT and filed on 5/21/2012 at 9:00 AM CDT

**Case Name:** Chip Randall and Sandy Randall  
**Case Number:** [12-10067](#)  
**Document Number:** [1](#)

**Docket Text:**  
Chapter 13 Voluntary Petition . Receipt Number cc, Fee Amount \$281 Filed by Chip Randall , Sandy Randall (Liska, Deanna)

The following document(s) are associated with this transaction:

**Document description:**Main Document  
**Original filename:**R:\TRN\BK\Application Class\Web\Class PDF Files\Voluntary Petition.pdf  
**Electronic document Stamp:**  
[STAMP bkecfStamp\_ID=1044576575 [Date=5/22/2012] [FileNumber=25563-0]  
[93b9881960c2f5714f7e10b7fe0d4214ce6c93df97ee22f1b597a61b84e2173174545  
58a2d50b45aa505e84b6c6a2e2cba2329e2cf5803ab1269d37d5ecc0a58]]

**12-10067 Notice will be electronically mailed to:**

Dayne L. Tracy on behalf of Debtor Chip Randall  
deadmail@support.aotx.uscourts.gov

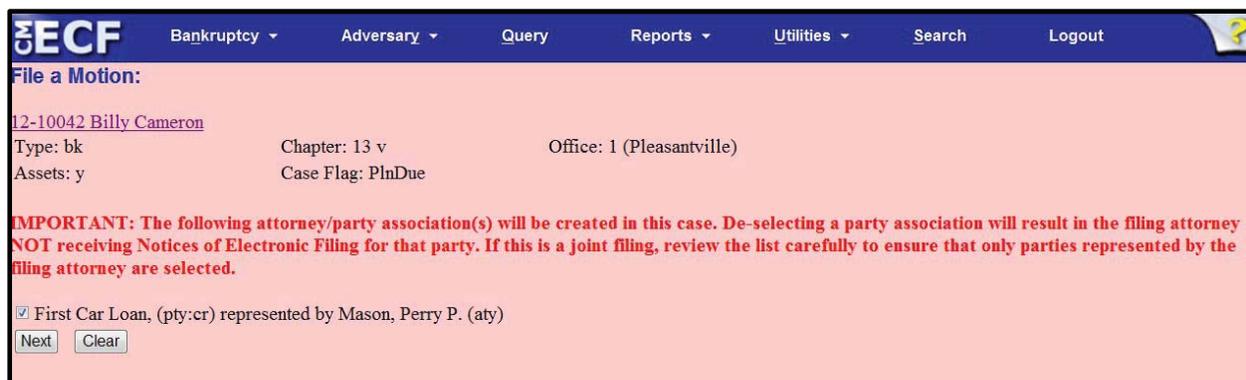
Dayne L. Tracy on behalf of Joint Debtor Sandy Randall  
deadmail@support.aotx.uscourts.gov

**12-10067 Notice will not be electronically mailed to:**

United States Trustee  
33 Whitehall Street  
21st Floor  
New York, NY 10004

## Attorney and Party Association

When an attorney or trustee files a pleading, they are prompted to indicate whether they should be linked to the party they represent. 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 checked by default. The message has been updated to reflect the implications of omitting this necessary association.



The screenshot shows the ECF system interface. At the top, there is a navigation bar with the ECF logo and several menu items: Bankruptcy, Adversary, Query, Reports, Utilities, Search, and Logout. Below the navigation bar, the main content area has a light pink background. It starts with the heading "File a Motion:" followed by a link "12-10042 Billy Cameron". Below this, there are several fields: "Type: bk", "Assets: y", "Chapter: 13 v", "Case Flag: PlnDue", and "Office: 1 (Pleasantville)". A prominent red warning message reads: "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." Below the warning, there is a checked checkbox for "First Car Loan, (pty:cr) represented by Mason, Perry P. (aty)". At the bottom of the form, there are "Next" and "Clear" buttons.

If the box is unchecked, the attorney will not get added to the case for noticing or shown in queries and not appear on or receive the Notice of Electronic Filing.

## Cases Report

Split, transferred and reopened dates have been added to the selection screen.

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: Pleasantville, Green Valley

Assets: [dropdown] Case Type: ap, bk Chapter: 7, 9

Trustee: Carson, Sam J., Chapter 11 Trustee

Attorney: Last name, First name, Bar ID

Date Type: Filed date, Entered date, Discharged date, Dismissed date, Converted date, Reopened date, Transferred date, Split date

From: 6/19/2012 to: 6/19/2012

Open cases, Closed cases, Voluntary, Party information, Pro se cases only

Small Business Cases

Nature of Debt, Nature of Business

County: ANDREWS-TX

Number of months without a confirmed plan From: [dropdown] To: [dropdown] Include dismissed cases

Sort by: Filed Date

Output Format: Formatted display, Data only, Include field descriptions

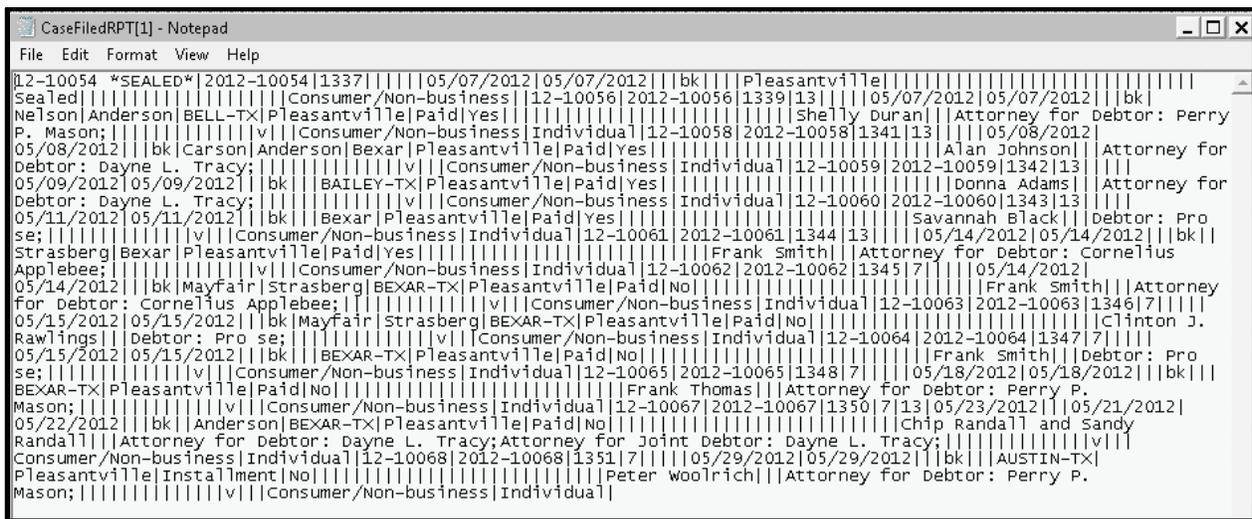
Run Report, Clear, Make these options my default

External users can now search for cases without a confirmed plan. When searching by unconfirmed plan dates, the 31-day range limit does not apply for this search.

Type of debtor, nature of debt, nature of business as well as county have been added to the selection screen

**Cases Report – Data Only**

In prior releases, when the Cases Report was run with “Party Information” not selected, a party’s attorney information was displayed on the formatted data output, but not on the data-only output. Now the data-only output lists the attorney information for the parties in the Attorney last name field, as shown below.



If multiple attorneys exist for various parties, the role and attorney are listed, separated by semicolons, in the same field. For parties without an attorney, the text “Pro se” is displayed instead of the attorney name.

A new format option, “Include field descriptions,” has been added for use when the data-only format is selected. The field descriptions are inserted in the header row.

**Claims Summary Report**

A Claims Summary Report option has been added to the Claims Register. This new format gives the viewer a snapshot overview of the claims on the case.

The screenshot shows the ECF Claims Register interface. At the top, there are navigation tabs: Bankruptcy, Adversary, Query, Reports, Utilities, Search, and Logout. Below these, the 'Claims Register' section contains several input fields: Case number (1:12-bk-10031), Creditor type (dropdown menu with 'Creditor' and 'Administrative' options), Creditor number, Creditor name, Claim number (range), and a date range (1/1/1990 to 6/4/2012). There are also 'Sort by' options (Claim Number, Filed Date) and a 'View multiple documents' checkbox. A red box highlights the 'View claims summary report' checkbox, which is checked. At the bottom, there are 'Run Report' and 'Clear' buttons.

The Claims Summary Report box produces a condensed list of claims.

**Claims Summary**

11-10004 [Clinton H. Vesperman and Anna C. Vesperman](#)

Type: bk Chapter: 13 Office: 1 (Pleasantville)  
 Assets: y Judge: ls  
 Date Filed: 03/10/2011 Last Date to File Claims: 07/07/2011 Last Date to File (Govt): 09/06/2011  
 Trustee: Kathleen Nelson

Claim #	Amount claimed *	Date filed	Creditor number	Creditor name
1 <a href="#">View</a>	\$37334.27	03/14/2011	32739	<a href="#">Ace Finance</a>
2 <a href="#">View</a>	\$14335.00	03/15/2011	32779	<a href="#">Central Finance</a>
3 <a href="#">View</a>	\$17554.00	03/17/2011	32739	<a href="#">Ace Finance</a>
4 <a href="#">View</a>	\$24667.23	03/17/2011	32756	<a href="#">Lacks Furniture #19</a>
5 <a href="#">View</a>	\$3700.00	03/17/2011	32739	<a href="#">Ace Finance</a>
6 <a href="#">View</a>	\$17346.78	09/16/2011	35278	<a href="#">2nd Savings and Loan Inc.</a>
7 <a href="#">View</a>	\$12778.00	09/16/2011	35279	<a href="#">The Doctor's Plaza</a>
8 <a href="#">View</a>	\$87345.23	09/16/2011	35280	<a href="#">First Bank of Austin</a>

Amount claimed: \$37334.27  
Secured claimed: \$37334.27

**Total Number of Claims: 8**

<b>Total Amount Claimed *</b>	\$215060.51
<b>Total Amount Allowed *</b>	

\* Includes general unsecured claims

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

## Claims Register View Multiple Documents

One 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 you to generate selected PDF claims with any related attachments in one PDF document.

ECF Bankruptcy Adversary Query Reports Utilities Search Logout

Claims Register

Case number: 1:11-bk-10004

Creditor type: Creditor Administrative

Creditor number: [input]

Creditor name: [input]

Claim number: [input] to [input]

View multiple documents

Filed Entered: 1/1/1990 to 6/18/2012

Sort by: Claim Number Filed Date

View claims summary report

Run Report Clear

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. You could view or print all claims on a case or all PDF documents from certain creditors if desired.

ECF Bankruptcy Adversary Query Reports Utilities Search Logout

SDSD  
Claims Register

[11-10004 Clinton H. Vesperman and Anna C. Vesperman](#)

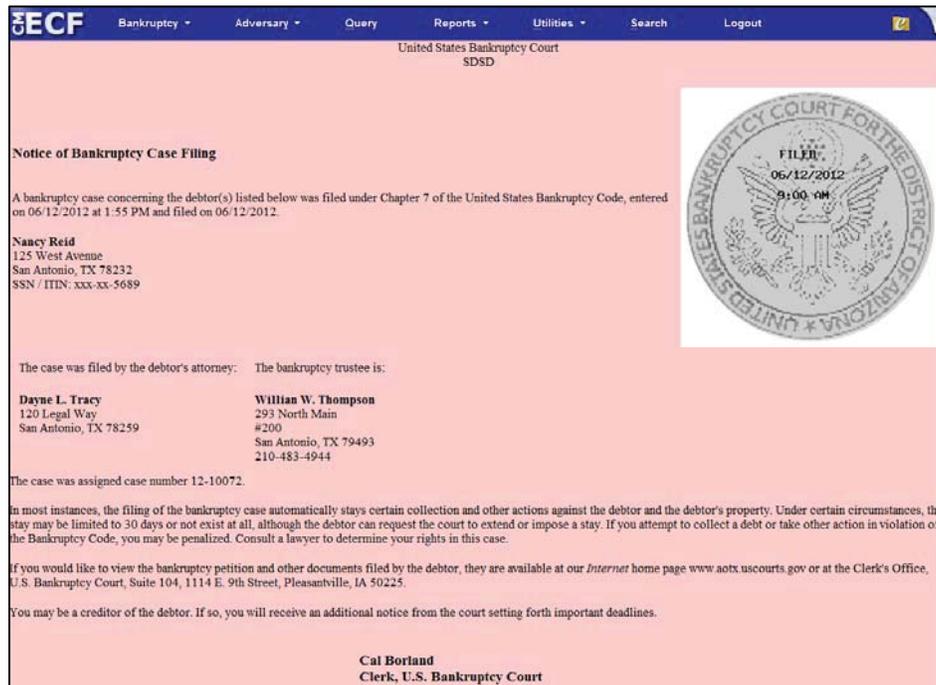
Judge: Lillian Strasberg Chapter: 13  
Office: Pleasantville Last Date to file claims: 07/07/2011  
Trustee: Kathleen Nelson Last Date to file (Govt): 09/06/2011

Select All Clear All

Creditor: (32739) Ace Finance Acct#: 3515 7121 W. Hwy 90 San Antonio, TX 78227 <a href="#">Claimant History</a>	Claim No: 1 Original Filed Date: 03/14/2011 Original Entered Date: 08/24/2011	Status: Allow 3 Filed by: CR Entered by: JPW Modified: 04/24/2012
Amount claimed: \$37334.27 Secured claimed: \$37334.27	History:	
<a href="#">Details</a> 1-1	<input type="checkbox"/>	03/14/2011 Claim #1 filed by First Nationwide Mortgage Corp, Amount claimed: \$37334.27 (JPW)
3	<input type="checkbox"/>	03/21/2011 Transfer of Claim Transferor: <a href="#">First Nationwide Mortgage Corp</a> (Claim No. 1) To Ecast Settlement Corporation (JPW) Additional attachment(s) added on 8/24/2011 (JPW)(JPW) (Entered: 03/21/2011). MODIFIED on (08/30/2011) Changed transferee from Ecast Settlement Corporation to Pioneer Funding group(Malin, Kate)(Entered: 08/30/2011). MODIFIED on (09/15/2011) to change transferee from Pioneer Funding group, LLC to Ace Finance; (JPW)(Entered: 09/15/2011). Status: Allow
<a href="#">doc</a>	<input type="checkbox"/>	03/23/2012 Notice of Mortgage Payment Change (Claim # 1) Filed by Joint Debtor Anna C. Vesperman , Debtor Clinton H. Vesperman (Orebaugh, Desiree)

## Case Conversion

Previously, if a case was converted and re-converted, the Notice of Bankruptcy Case Filing query screen reflected the converted chapter rather than the original chapter. Now the original chapter is saved permanently in a new field. The original chapter will be correct for cases filed and converted after Release 5.



The original chapter and current chapter will also display on the Case Summary Query and the Docket Sheet for re-converted cases after Release 5. Case Summary is shown below.

