

FINANCIAL MANAGEMENT CERTIFICATE FILING PROCEDURES

1. Internet Access - - The user will need to use one of the following two options:
 - a. Through Court Website:
 - i. Enter WWW.COB.USCOURTS.GOV in the browser's address field
 - ii. Press enter to bring up the District of Colorado's Bankruptcy website
 - iii. On the left side of the page, click the E-Filing (CM/ECF) button. See screen shot below.



- iv. Click on the District of Colorado - Document Filing System
 - b. Open Internet Explorer or Firefox
 - i. Enter ECF.COB.USCOURTS.GOV in the court in the browser's address field
 - ii. Press enter to bring up the District of Colorado, United States Bankruptcy Court's ECF website.

NOTE: The Back or Forward arrow buttons on your Internet Explorer bar can be used to back up or go forward in case processing at any time. See the actual steps in docketing for further clarification

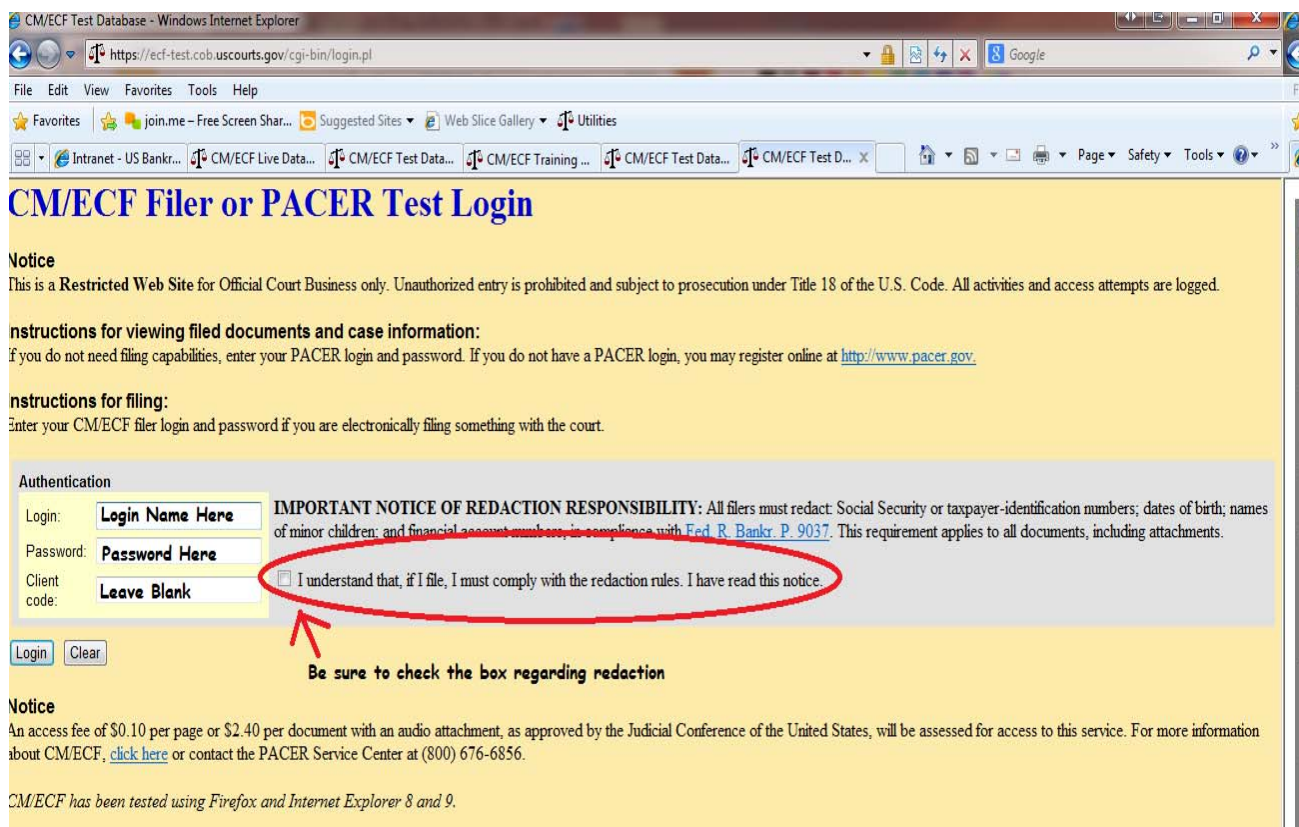
2. Logins and Passwords
 - a. Enter the user's login name in the proper box
 - b. Enter the user's password in the proper box
 - c. The **Client code** box on log-in should be blank

- d. User **must** check the box to indicate that he/she understands compliance with the redaction rules. See Screen Shot below

NOTE: IMPORTANT NOTICE OF REDACTION RESPONSIBILITY:

All filers must redact: Social Security or taxpayer-identification numbers; dates of birth; names of minor children; and financial account numbers, in compliance with Fed. R. Bankr. P. 9037. This requirement applies to all documents, including attachments.

- e. Ensure:
 - i. The user name is correct



- ii. The redaction notification has been checked
 - iii. If an error is made entering login and password information before submitting the screen, clicking the **[Clear]** button will delete the data and allow you to reenter information.
- f. Click on Log-in
 - g. The following information is for the user's information:
 - i. The logins and passwords are issued by each court.
 - ii. These logins and passwords allow electronic filing of documents.

- iii. The user's login and password constitute the electronic equivalent of their signature. This concept is generally incorporated into the court's General Order on Electronic Filing or by Local rule.
- iv. Each Course Provider is personally responsible for all activity with their logins.
- v. The **Client code** field on log-in should be blank.

3. The CM/ECF Menu Screen

- a. Access to the various filing menus is provided by the blue main menu bar at the top of the screen.
- b. Each selection is a hyperlink to another set of options or hyperlinks.
- c. This menu is also used to exit the system. The preferred method to exit CM/ECF is to click the **[Logout]** hypertext link on this CM/ECF main menu bar.
- d. Personal Financial Management Course Providers will only have access to the Bankruptcy Menu

DOUBLE CHECK YOU HAVE THE CORRECT DEBTOR'S NAME, CASE NUMBER AND THE BANKRUPTCY DISTRICT ON THE " CERTIFICATE OF DEBTOR EDUCATION" FORM BEFORE FILING.

4. Filing in CM/ECF

- a. Click on **[Bankruptcy]** in the blue main menu bar
- b. Click on **[Personal Financial Mgt Certificates]**
- c. Enter the case number in yy-nnnnn format, including the hyphen
- d. Click **[Next]**

NOTE: As the case number is entered, an additional button appears. The **Find This Case** button may be used to verify the case number.

NOTE: If the system displays a "Cannot find case XX-XXXXX" message you may delete the incorrect case number and try entering the case number again. In addition, you may use the browser **[Back]** button at any time during this process to verify former screens until the final submission.

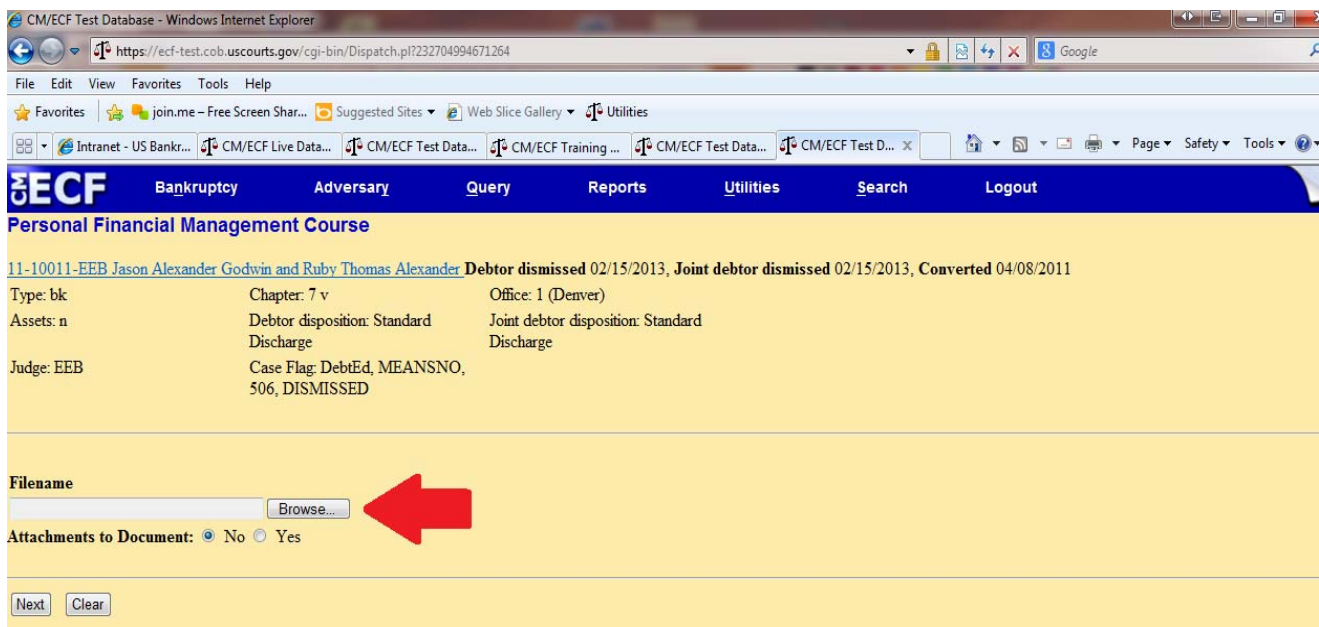
If you have already accessed a case in this session, the number of the last case accessed will be displayed. Make sure the correct case number appears.

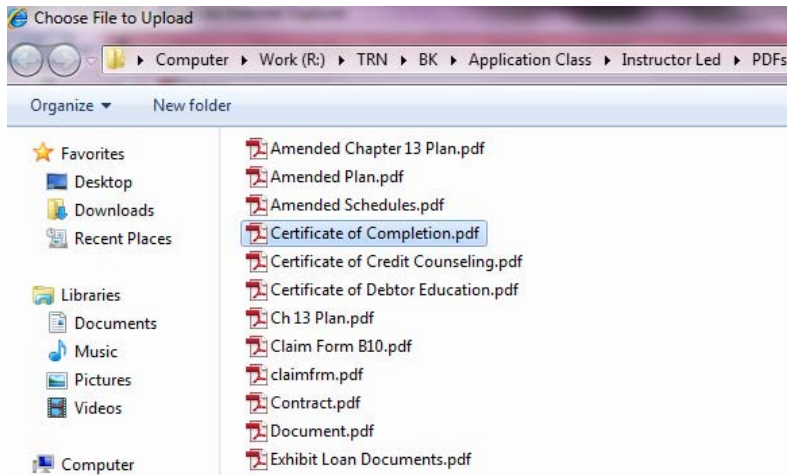
You may cancel an event in process at any time by clicking on another menu option from the Main Menu to start over

- e. Click on the proper event name below the **Available Events** header to select it.
 - i. **Personal Financial Management Course** - - should be selected if this is the first certificate being filed in this case
 - ii. **Amended Personal Financial Management Course** - - should be selected if this certificate is correcting some information in the original certificate. This is rarely used.
 - iii. Notice your selection will now also appear in the **Selected Events** list on the right side of this screen
- f. Click **[Next]** to continue.
- g. Attaching the PDF document to the entry

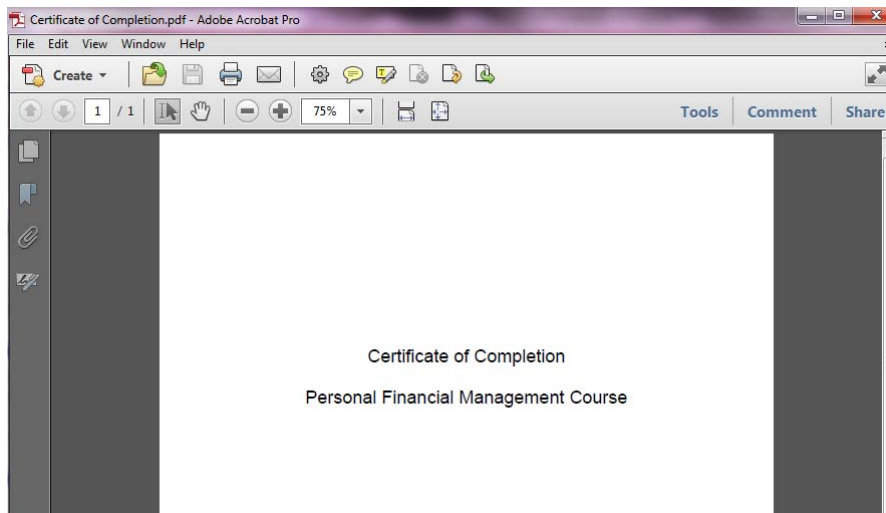
NOTE: The Bankruptcy Court for the District of Colorado encourages the Provider to submit one PDF document consisting of 2 pages for both the debtor and joint debtor, if the case is a joint case. It is at this point you can select the 2 page document

- i. Click **[Browse]** as shown in the screen shot below.
- ii. Navigate to the directory where the appropriate PDF file is located and select the document with your mouse. See Screen Shot below





- iii. To make certain you are about to associate and file the correct PDF file, right-click on the filename and click **[Open]**.
- iv. This will launch the Adobe Acrobat Reader to display the imaged document to verify that this is the correct document. See Screen Shot below



- v. Close the Adobe application. Click **[Open]** on the **Choose File to Upload** dialogue box.

Instructions on how to set up Acrobat to open PDF documents outside of the Browser are included at the end of this document.

- vi. Click Next
- h. Depending on if the case is an individual debtor (One person filed) or is a joint case (two

persons filed) one of the following will need to be followed:

i. Steps to electronically file for Individual Debtor:

- (1) Click Next
- (2) The Docket text will be displayed as it will appear on the public docket
- (3) Ensure the docket text is accurate
- (4) Notice the Attention message immediately under the docket text. It reads:

Attention!! Submitting this screen commits this transaction. You will have no further opportunity to modify this submission if you continue.
Have you redacted?

- (5) If the Docket text appears to be incorrect, you have an opportunity to use the browser back button one or more times to find the error, however you will need to attach the "PDF" again at the "Browse" screen.
- (6) If the Docket text appears to be correct, click next.
- (7) Your name as the user will appear in parenthesis within the docket text on the public docket

ii. Steps to electronically file for Joint Debtors:

- (1) You will need to select ONE of the following options on this screen:
 - (a) Debtor - - select only if the first person listed on the case is the only party who completed the Financial Management Course
 - (b) Joint Debtor - - select only if the second person listed on the case is the only party who completed the Financial Management Course
 - (c) Both Debtors - - select this if BOTH debtors completed the Financial Management Course and both Financial Management Certificates are being as one PDF.



- (2) Click Next
- (3) Click Next
- (4) The Docket text will be displayed as it will appear on the public docket
- (5) Ensure the docket text is accurate
- (6) Notice the Attention message immediately under the docket text. It reads:

Attention!! Submitting this screen commits this transaction. You will have no further opportunity to modify this submission if you continue.

Have you redacted?

- (7) If the Docket text appears to be incorrect, you have an opportunity to use the browser back button one or more times to find the error, however you will need to attach the "pdf" again at the "Browse" screen.
- (8) If the Docket text appears to be correct, click next.

- (9) Course Providers name as the user will appear in parenthesis within the docket text on the public docket

5. Notice of Electronic Filing - - certifies the filing with the court. See the Screen Shot below.

The screenshot displays the ECF system interface for a bankruptcy case. At the top, there is a navigation bar with links for Bankruptcy, Adversary, Query, Reports, Utilities, Search, and Logout. Below this, the case information is shown: Case 13-10005 Jerry Jones, Chapter 7 v, Office: 1 (Pleasantville), Judge: ca. The court is identified as U.S. Bankruptcy Court, SDSD. A Notice of Electronic Filing is posted, stating that a transaction was received from Choice Credit Counseling on 9/26/2013. The case name is Jerry Jones, case number is 13-10005, and document number is 2. The docket text, highlighted in a red box, reads: "Personal Financial Management Course Certificate For Debtor (Choice Credit Counseling)". Below this, it states that the following document(s) are associated with this transaction. The document description is "Main Document" with the original filename: R:\TRN\BK\Application Class\Instructor Led\PDFs\Document.pdf. The electronic document stamp includes a unique identifier and a date of 9/26/2013. The notice is to be electronically mailed to Cecelia Eastman on behalf of Debtor Jerry Jones, with the email address cecelia_eastman@thisemail.com. The notice will not be electronically mailed to the United States Trustee at 33 Whitehall Street, 21st Floor, New York, NY 10004.

- a. Information Contained in the Notice of Electronic Filing
- i. Date and time stamp information
 - ii. Debtor name
 - iii. Case number *hyperlink* to the docket sheet
 - iv. Docket text
 - (1) Text produced from docket event.
 - (2) Attachment type, description, and attachment number, which is a *hyperlink* to the PDF file of the attached document, if there is one.
 - v. Document number *hyperlink* to associated (PDF) documents
 - vi. Electronic document stamp: Unique identifying name of the document being filed

for security purposes. Key file of the court used for encryption

- b. Printing a a copy of this notice:
 - i. Click the browser **Print** icon.
 - ii. You may also save a copy of this notice by:
 - (1) Clicking **File** on the browser menu bar
 - (2) Selecting the **Save As...** option

NOTE: You can only access the docket sheet and the PDF document through these *hyperlinks* if you have a PACER login. Information contained in the Notice of Electronic Filing: