

U.S. Bankruptcy Court  
Western District of  
Wisconsin

**CM/ECF Filing Guide  
for Limited Use  
Participants**

(Revised December 1, 2003)

[www.wiw.uscourts.gov/bankruptcy/pdf/Creditor\\_Docketing\\_Guide.PDF](http://www.wiw.uscourts.gov/bankruptcy/pdf/Creditor_Docketing_Guide.PDF)

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## Filing Documents

Document:	Select:	Notes:
Reaffirmation Agreement	<p><b>Bankruptcy &gt; Creditor Claim Actions &gt; Reaffirmation Agreement</b></p> <p style="text-align: center;"><b>OR</b></p> <p><b>Bankruptcy &gt; Creditor Claim Actions &gt; Reaffirmation Agreement with atty declaration</b></p>	<ul style="list-style-type: none"> <li>Select the party from the list. If the party is not listed, click the <i>Add/Create New Party</i> button and add party information. (Refer to <b>Add Party to Case</b> instructions on page 9.)</li> <li>Select the PDF file. (Refer to <b>Select the PDF Document</b> instructions on page 10.)</li> </ul>
Reaffirmation Agreement and Attorney Declaration (batch)	<p><b>Bankruptcy &gt; Batch Filings</b> (enter case number(s)) &gt; <b>Reaffirmation Agreement with Attorney Declaration (batch)</b></p>	<ul style="list-style-type: none"> <li>Select the PDF file. (Refer to <b>Select the PDF Document</b> instructions on page 10.)</li> </ul>
Creditor's Request for Notice	<p><b>Bankruptcy &gt; Creditor Claim Actions &gt; Creditor Request for Notices</b></p>	<ul style="list-style-type: none"> <li>Select the party from the list. If the party is not listed, click the <i>Add/Create New Party</i> button and add party information. (Refer to <b>Add Party to Case</b> instructions on page 9.)</li> <li>Select the PDF file. (Refer to <b>Select the PDF Document</b> instructions on page 10.)</li> <li>After completing this entry, add the creditor to the creditor mailing matrix. (Refer to <b>Add Creditor to Creditor Mailing Matrix</b> instructions on page 4.)</li> </ul>

<p>Creditor's Request for Notice (batch)</p>	<p><b>Bankruptcy &gt; Batch Filings</b> (enter case number(s)) &gt; <b>Creditor Request for Notices (batch)</b></p>	<ul style="list-style-type: none"> <li>• Select the PDF file. (Refer to <b>Select the PDF Document</b> instructions on page 10.)</li> <li>• After completing add the creditor to the creditor mailing matrix. (Refer to <b>Add Creditor to Creditor Mailing Matrix</b> instructions on page 4.)</li> </ul>
<p>Add Creditor to Creditor Mailing Matrix</p>	<p><b>Bankruptcy &gt; Creditor Maintenance</b> &gt; Enter individual creditors</p> <p style="text-align: center;"><b>OR</b></p> <p>When filing a Proof of Claim, click on the <i>Add Creditor</i> link.</p>	<ul style="list-style-type: none"> <li>• On the <i>Add Creditor(s)</i> screen, enter the creditor's complete name and address.</li> <li>• When completed, click on <i>Last Entry</i>. Click <i>Next</i> then <i>Submit</i>.</li> </ul>

File Claim	<b>Bankruptcy &gt; File Claims</b>	<ul style="list-style-type: none"><li>• On <i>Search for Creditor</i> screen, enter case number and name of creditor for whom the proof of claim is being filed (optional); leave type as <i>All creditors</i>; click <i>Next</i>.</li><li>• If creditor appears on screen, select creditor and click <i>Next</i>; if creditor does not appear, click on <i>Add Creditor</i> and follow the prompts.</li><li>• On the <i>Proof of Claim Information Screen</i>, enter the following:<ul style="list-style-type: none"><li>• Amends Claim # (if applicable)</li><li>• Duplicates Claim # (if applicable)</li><li>• Filed By: (select attorney or creditor)</li><li>• Late (select Yes or No)</li><li>• Amount Claimed (Do not enter the "\$" or commas)</li><li>• Description (if necessary)</li><li>• Remarks (if necessary)</li></ul></li><li>• Select the PDF file. (Refer to <b>Select the PDF Document</b> instructions on page 10.)</li></ul>
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<p>Withdrawal of Claim</p>	<p><b>Bankruptcy &gt; Claim Actions &gt; Expungement/Withdrawal of Claim</b></p>	<ul style="list-style-type: none"> <li>• Select the party from the list. If the party is not listed, click the <i>Add/Create New Party</i> button and add party information. (Refer to <b>Add Party to Case</b> instructions on page 9.)</li> <li>• Select the PDF file. (Refer to <b>Select the PDF Document</b> instructions on page 10.)</li> <li>• Enter Claim # when prompted.</li> <li>• Add name of creditor in text box.</li> </ul>
<p>Letter Satisfying Claim</p>	<p><b>Bankruptcy &gt; Claim Actions &gt; Letter Satisfying Claim</b></p>	<ul style="list-style-type: none"> <li>• Select the party from the list. If the party is not listed, click the <i>Add/Create New Party</i> button and add party information. (Refer to <b>Add Party to Case</b> instructions on page 9.)</li> <li>• Select the PDF file. (Refer to <b>Select the PDF Document</b> instructions in this guide).</li> <li>• Enter Claim # when prompted.</li> <li>• Add name of creditor in text box.</li> </ul>

Assign/Transfer Claim	<b>Bankruptcy &gt; Claim Actions &gt; Assignment/Transfer of Claim</b>	<ul style="list-style-type: none"> <li>• Select the party from the list. If the party is not listed, click the <i>Add/Create New Party</i> button and add party information. (Refer to <b>Add Party to Case</b> instructions on page 9.)</li> <li>• Select the PDF file. (Refer to <b>Select the PDF Document</b> instructions on page 10.)</li> </ul>
Assign/Transfer Claim (batch)	<b>Bankruptcy &gt; Batch &gt; Assign/Transfer Claim (batch)</b>	<ul style="list-style-type: none"> <li>• Select the PDF file. (Refer to <b>Select the PDF Document</b> instructions on page 10.)</li> </ul>
Notice of Assignment/Transfer of Claim	<b>Bankruptcy &gt; Claim Actions &gt; Notice of Assignment/Transfer of Claim</b>	<ul style="list-style-type: none"> <li>• Select the party from the list. If the party is not listed, click the <i>Add/Create New Party</i> button and add party information. (Refer to <b>Add Party to Case</b> instructions on page 9.)</li> <li>• Select the PDF file. (Refer to <b>Select the PDF Document</b> instructions on page 10.)</li> <li>• Enter Last Day to File Objections/Request for Hearing.</li> <li>• Refer to Assignment/Transfer of Claim.</li> </ul>
Corrective Entry	<b>Bankruptcy &gt; Creditor Claim Actions &gt; Corrective Entry</b>	<ul style="list-style-type: none"> <li>• Refer to document filed in error (Category will be “claims” or “crmisc”)</li> <li>• Enter brief explanation of error in text box</li> <li>• If necessary, re-file the pleading</li> <li>• <b>Contact Clerk’s Office if you have questions</b></li> </ul>

## Utilities/Reports

Document:	Select:	Notes:
Change Password	<b>Utilities &gt; Maintain Your ECF Account</b>	<ul style="list-style-type: none"> <li>• Scroll down to bottom of screen and click on <i>More user information</i>. After changing your password, click on <i>Return to Account Screen</i> then scroll down to bottom of screen and click <i>Submit</i> and <i>Submit</i> to have any changes recorded.</li> </ul>
Change Email information	<b>Utilities &gt; Maintain Your ECF Account</b>	<ul style="list-style-type: none"> <li>• Scroll down to bottom of screen and click on <i>Email information</i>. After changing your e-mail settings, click on <i>Return to Account Screen</i> then scroll down to bottom of screen and click <i>Submit</i> and <i>Submit</i> to have any changes recorded.</li> </ul>
View Your Transaction Log	<b>Utilities &gt; View Your Transaction Log</b>	<ul style="list-style-type: none"> <li>• Enter start date and end date.</li> </ul>
Claims Register	<b>Reports &gt; Claims Register</b>	<ul style="list-style-type: none"> <li>• Log into system using PACER Login and Password.</li> <li>• Enter case number.</li> <li>• Click <i>Run Report</i>.</li> </ul>
Creditor Mailing Matrix	<b>Reports &gt; Creditor Mailing Matrix</b>  or  <b>Utilities &gt; Mailings</b>	<ul style="list-style-type: none"> <li>• The 1-column file can be saved as a text file on your computer with the <i>File/Save As</i> browser option. The saved file can then be edited and printed on labels or you can use the cut and paste option.</li> </ul>

Help	
Screen:	Instructions for Attorney's and Creditor Representatives:
No additional selection(s) needed	Click <i>Next</i> .
Select the Party	Select the party from the list. If the party is not listed, select the <i>Add/Create New Party</i> button and add party information. Refer to <b>Add Party to Case</b> instructions on page 9 for instructions on how to add party to case.
Add Party to Case	<ol style="list-style-type: none"> <li>1. Search for the party. <ol style="list-style-type: none"> <li>a. Begin by searching to see whether the party is already in the database.</li> <li>b. To search, enter all or part of the last or business name, and click the <i>Search</i> button.</li> </ol> </li> <li>2. Select a party already in the database or add a new one. <ol style="list-style-type: none"> <li>a. If the party is already in the database, highlight the name on the party list, and click the <i>Select name from list</i> button.</li> <li>b. To add a new party to the database, click the <i>Create new party</i> button. In either instance, the <i>Party Information</i> screen will be displayed.</li> </ol> </li> <li>3. Enter the information about the party. <ol style="list-style-type: none"> <li>a. For a party already in the database, fill in the party role and pro se fields, and enter party text if needed. (Party text appears after the party's name on the cover sheet of the docket, e.g., ABC Corporation, a subsidiary of XYZ International.) To change address information just for this case for a party already in the database, type over the existing address information.</li> <li>b. For a new party, fill in the name, address, party role, and pro se fields, and enter party text if needed.</li> </ol> </li> <li>4. Click Submit.</li> </ol>

<p>Select the PDF document</p>	<p>Click on the <i>Browse</i> button to search your network and select from those files. Remember to change the file type to Acrobat (*.pdf). To make certain that you are about to associate the correct PDF file for this entry, right-click on the file name with your mouse and select <b>open</b>.</p> <ul style="list-style-type: none"><li>• If your filing does not have attachments, click <i>next</i> to continue.</li><li>• If your filing has attachment(s), <i>e.g.</i>, financing papers, exhibits, supporting documents, etc., click <i>Yes</i> for "Attachments to Document." Click <i>Next</i> to see the attachments screen.<ol style="list-style-type: none"><li>1. Enter the PDF document that contains the attachment.<p>Click on the <i>Browse</i> button to search your network and select from those files. Remember to change the file type to Acrobat (*.pdf). To make certain that you are about to associate the correct PDF file for this entry, right-click on the file name with your mouse and select <b>open</b>. If your filing has more attachments, first continue labeling this attachment following the instructions below.</p></li><li>2. At your option, select a document type or enter a description.<p>If you press the down arrow to the right of the <i>Type</i> box, you see a list of available attachment types. Select the one you want by highlighting it or type a short description of your attachment.</p></li><li>3. Add the filename to the list box below.<p>Add the attachment you have entered to this list by clicking the <i>Add to List</i> button. If you have more attachments, go back to Step 1. Continue until all your attachments are on this list.</p></li></ol></li></ul>
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<p>Refer to existing event(s)?</p>	<p>Check the box if you would like to relate this event to an earlier event in this case. Two more screens may display after you click <i>next</i>:</p> <ul style="list-style-type: none"> <li>• <i>Please select the category...:</i> A list of event categories is displayed. Select one or more categories from the list by highlighting the ones you need and clicking <i>Next</i>. A list of all the docket entries in those categories is shown.</li> <li>• <i>Include:</i> Check the box for each docket entry that should relate to the current filing. Click <i>Next</i>.</li> </ul>
<p>Notice of Electronic Filing</p>	<p>The Notice of Electronic Filing is the verification that the filing has been sent electronically to the Court's database. It certifies that this is now an official court document.</p> <ul style="list-style-type: none"> <li>• Clicking on the case number hyperlink will present the docket report for this case. Note that you will be prompted for your PACER login and password. Users must be registered with the PACER system to have a login and password.</li> <li>• Clicking on the document number hyperlink will present the PDF image of the document just filed. Note that you will be prompted for your PACER login and password.</li> <li>• <b>Note: To get your free look, you must click on the document number hyperlink from the Notice of Electronic Filing that you receive <u>via e-mail</u>...not the Notice of Electronic Filing that you see at the conclusion of the filing process.</b></li> <li>• Scroll down to see participants who have or have not registered for electronic noticing on this case.</li> <li>• To print a copy of this notice, click the browser <i>Print</i> icon.</li> <li>• To save a copy of this notice, click <i>File</i> on the browser menu bar and select <i>Save Frame As</i>.</li> </ul>