

Attorney Notes for CM/ECF Release 3.2 and 3.3.1

On February 23, 2009, the U.S. Bankruptcy Court, Western District of Texas will simultaneously implement two new releases of CM/ECF (3.2 and 3.3.1) with the following changes. Electronic filers should contact their petition preparation software vendor to ensure that their software is in compliance with the releases of CM/ECF 3.2 and 3.3.1.

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You may also wish to view one or more of the following Electronic Learning Modules which provide more details.

CM/ECF Release 3.2 New User Interface

CM/ECF Release 3.2 Docket Report Enhancements

You can view these modules by clicking the Training link on the Court WEB site (www.txwb.uscourts.gov), then clicking the ELM title under Internet Tutorials.

1. Menu and Event Search

- A. On the CM/ECF Main Menu Bar there is a new Hyperlink labeled Search. When you left-click on Search, a search word box appears.
- B. You may search for word fragments, such as 'ear' instead of 'hearing'. The search is not case sensitive.
- C. Click the magnifying glass icon to perform the search.
- D. On the results screen, the word fragment that you searched for will be highlighted. The word may appear anywhere in the name of a menu item or event.
- E. Only menu items and events that you have permission to run are shown. Each item is a link that takes you directly to the menu item or event.

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2. Event Selection

- A. When the user must choose from a long list of events to docket (as for the Motions/Applications category on the Bankruptcy Events menu), it is no longer necessary to scroll through the list to find the desired event. A text box is provided above the list.
- B. As you type a key word in the text box, the program reduces the list of available events to those events that match your search criteria.
- C. You may search by a word fragment. The key word may be anywhere in the event name. The search is not case sensitive.
- D. Clicking on the event you want moves the event over to the Selected Event box.
- E. You may select multiple events by holding the Ctrl key and clicking each event.

NOTE: When you select an event from the Search Results screen, the event you selected is automatically placed in the selected event box. You do not have to search for it again.

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3. Case Opening

- A. A new screen has been added to the **Open A BK Case** program to collect data needed by the Executive Office of the US Trustees (EOUST). The new statistical fields being collected during case opening may also be supplied via the case upload function.

- B. The screen for entering statistical data no longer includes these items for an involuntary case:
 - (1) Prior filing within 8 years
 - (2) Asset notice
 - (3) Estimated number of creditors
 - (4) Estimated Assets
 - (5) Estimated Liabilities.

- C. A new screen is added which displays for chapter 7 cases only with the following message:

*"PLEASE NOTE: FOR CASES FILED ON OR AFTER
DECEMBER 19, 2008:
IF THE DEBTOR OR JOINT DEBTOR SEEKS TEMPORARY
EXCLUSION FROM THE MEANS TEST UNDER THE
NATIONAL GUARD AND RESERVIST DEBT RELIEF ACT OF
2008, IN ADDITION TO FORM B22A, YOU MUST MAKE A
SEPARATE DOCKET ENTRY LOCATED UNDER THE OTHER
CATEGORY ((Statement of Debtor's Temporary Exclusion
from Means Test))"*

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4. **Additional Information on Docketing Header (And other reports)**

- A. For joint cases that are pending, or were closed with the 3.3 version of the application, the data displayed after the case number/title includes the dismissed date for the joint debtor. The disposition for both debtors in a joint case is also shown.

NOTE: Many parts of the application display the data for both debtors. However, the display is misleading for cases that were dismissed or discharged prior to the CM/ECF 3.3 installation (and therefore do not have this data for each debtor) but are still open or have been reopened. For these cases, labels for joint debtor data are shown, but with "N/A", "None", or no value - thus it appears that the joint debtor has not been dismissed or discharged when that is not the case.

- B. If the case selected for docketing is a member case, a message is displayed which includes the lead case number. The lead case number is now a link to that case.

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5. Notice Of Electronic Filing

- A. When a user clicks a document link on an NEF for which a free look is available (in their e-mail) , the following is displayed on the document selection screen:

"To view the main document and its attachments without incurring a PACER fee, click on the hyperlinks displayed on this menu. You will incur a PACER fee to view CM/ECF documents from hyperlinks within the documents."

- B. Previously, only the name and email address was shown in the list of recipients (and names of those not notified electronically). Now, an attorney recipient also shows "on behalf of" and the type and name of the party represented; if multiple parties are represented, only the first one is shown from a list sorted by attorney last name, party role description, party first name, and party last name. The same information is shown on the Notice of Electronic Claims Filing.

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6. Transcript Restrictions

- A. Effective February 23, 2009, any new transcript which is filed will be restricted from public viewing for 90 days after filing.
- B. Parties who appear at a hearing can request redaction of information in accordance with F.R.B.P. 9037.
- C. Four events have been added for electronic filers
 - (1) **Notice of Intent to Request Transcript Redaction** in the Other Category
 - (2) **Transcript Redaction Request** in the Other Category
 - (3) **Motion to Extend Time to File Notice of Intent to Request Transcript Redaction** in the Motions/Applications Category
 - (4) **Motion to Extend Time to File Transcript Redaction Request** in the Motions/Applications Category

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7. Modifications to the Proof of Claim event

- A. If creditors are returned from a search and the user expands the pull down list, holding the cursor over a creditor's name will list the numbers of the claims that have been filed for that creditor. If a claim is no longer owned by that creditor, its number appears in parentheses. **Note:** users of Internet Explorer Version 6 (or lower) will not see this display.
- B. There is now a Find button next to the "Amends Claim #" box.
 - (1) The user can click this button to display claims that have been filed in the case in a separate window.
 - (2) If the original claim number is typed in the box first, only that claim is displayed.
 - (3) The user can click the column header for Creditor Name or Claim # to sort the list by that item.
- C. If the user selects a claim to be amended that was filed by the same creditor, the values from the previous claim are copied into the Proof of Claim screen for editing.
- D. If the user selects a claim to be amended that had been filed by a different creditor, a confirmation/warning screen is displayed. If the user clicks Continue, values from the previous claim are copied into the Proof of Claim screen for editing, as described above.

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8. Docketing Event Additions or Enhancements

- A. Added the **Debtors Motion for Entry of Discharge Order and Certification/Affidavit Regarding Plan Completion** event in the Motions/Applications Category for filing in Austin and Midland division cases.
- B. Added the **Statement of Corporate Ownership** event in the Other Category.
- C. Added the **Recision of Reaffirmation Agreement** event in the Other Category.
- D. Modified the **Amended Matrix (adding or deleting creditors) and Amended Schedules with D, E, or F; Amended Schedules (without D, E, or F); Amended Schedules (with Schedules D, E, or F); Schedules; Schedules, Statement and Summary; and Amended Schedules (Conversion)** events in the Other Category to permit entry of the dollar amount for Debtor's Total Claim of Exemptions (Schedule C).
- E. Added the **Update EQUST Stats** event in the Other Category to permit entry and updating of data needed by the Executive Office of the US Trustees (EOUST).
- F. Added the **Request for Separate Notice** event in the Other Category.
- G. Added the Text-Only **Statement of Debtors Temporary Exclusion from Means Test** event in the Other Category.
- H. Added the Text-Only **Release from Activity Duty** event in the Other Category.
- I. Added the **Motion to Dismiss One Debtor** event in the Motions/Applications Category.

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- J. Modified the Motion to Dismiss Party event in the Motions/Applications Category to display this message at beginning of the event.

"DO NOT USE THIS EVENT IF YOUR INTENT IS DISMISS A DEBTOR. USE THE MOTION TO DISMISS A SINGLE DEBTOR EVENT!"

- K. Enhanced the Application for Compensation

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9. Query

- A. Check boxes for open and closed cases have been added to the selection screen.
- B. For a bankruptcy case that was closed with the 3.3 version of the application, the abbreviated case data displayed at the top of the screens now includes the dismissed date; discharged and dismissed dates for the joint debtor are displayed for a joint case.
- C. Under Associated Cases, Closed cases are now marked with "(closed)" after the case title. If the case has been archived, court users will see "(archived)" instead.

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10. Reports

- A. Changes to the style of column headers and to the font have been made as part of an ongoing effort to standardize the format of CM/ECF reports.
- B. Cases Report
 - (1) If a joint bankruptcy case was closed with the 3.3 version of the application, the joint debtor's disposition, discharged date, and dismissed date are displayed in addition to those items for the first debtor. The "data only" output also includes these items. In addition, the format of the data record is the same for all types of cases, and whether or not party information is requested; previously, the number and order of the fields was different for adversary and bankruptcy cases.
 - (2) When a discharged or dismissed date is specified on the selection screen, the data for both debtors in a joint case is checked.
- C. Claims Activity
 - (1) Previously, administrative claims were not displayed on the report. Now, "Admin claimed" and "Admin allowed" are shown.
 - (2) Previously, "Amended by No." was shown (whether or not an amendment had been filed). This item is no longer included in the report.
- D. Claims Register
 - (1) Multiple creditor types can now be selected; the type of creditor is displayed on the search results list
 - (2) Pop-up calendars which highlight non-working days have been added for the "from" and "to" dates. Users are not prevented from selecting a non-working day.

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- (3) In the History section for each claim, there is now a "Details" link for each item which provides additional information. This will allow users to better track changes such as adding an "Amends Claim #" value to an existing claim via the Edit Claims utility. The logic for the History section has been modified to more accurately display claim information.
- (4) A PDF document filed with the claim will be displayed with headers if the application is set to display PDF headers and the user has checked the "Add Headers to PDF Documents" option for their account
- (5) Previously, when a claim was transferred to an administrative creditor, that creditor was not identified with the "ADMINISTRATIVE" label. This has been corrected.
- (6) A change of creditor is shown when the Details link of a claim's history is clicked, with the "from" and "to" names. For consistency, the label To:' has been changed to "TO:".
- (7) When a user clicks a link for a claim document, the claim may be displayed with a PDF header, depending on the application configuration and the user's preferences; the header may include the claim number and part number (e.g., Proof of Claim #4-1). However, under certain circumstances the header may show only the claim number or only the part number (when an inside user selects one of the editing options "Edit claims", "Modify the description of claims", "Delete attachment(s)", or "Delete claims"). To view the document with both claim and part numbers, right-click the link and open the document in a new tab or window.

E. Deadlines/Hearings

Previously, judge selection applied only to the hearing judge. Now, the court user can designate whether the hearing judge, the case judge, or both should be considered; that portion of the selection screen is shown below. The 'Unassigned' option in the judge selection list is now named "Unassigned hearing judge".

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F. Docket Activity

- (1) Check boxes for open and closed cases have been added to the selection screen.
- (2) Previously, the user could select by event category OR by event. Now, both selection criteria can be used.
- (3) Previously, the event name was displayed in the Category/Event column only when the Summary Text option was selected. Now, event name is shown for both the Summary Text and the Full Docket Text options.

G Docket Report Selection screen - additions

- (1) Include Headers when displaying PDF documents.

If checked, the header appears on each page of any PDF you view. The header shows the case number, document number, filed date, EOD and time, description and page number. If a header is displayed, it will also be printed.

- (2) View multiple documents

If checked on selection screen, The docket report will include a new column labeled "Select". Users will be permitted to select multiple documents that will be displayed in one PDF file for viewing, printing or downloading to a zipped file. Headers on each page is an option Users will be charged the same rate per page.

- (3) Create Appendix

Like the Multiple Documents feature, this creates one file of selected PDF documents automatically including a full docket report, headers and page numbers

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11. **US Party/Case Index**

For a joint bankruptcy case that is open, or was closed with the 3.3 version of the application, the dismissed date, discharged date, and disposition for the joint debtor are included in the data file; the joint case flag has also been added.

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