

**Administrative Office of the U. S. Courts**

***CM/ECF***

**Bankruptcy Release 3.2**

**Notes for PACER Users**

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# Bankruptcy Release 3.2

This document summarizes the changes you may notice when you use CM/ECF in a U. S. Bankruptcy Court that has installed Release 3.2 of the application. Note that what you see in a particular court may be different from what is described here.

## ***Changes seen when you are logged in with a PACER or CM/ECF account***

### **Cascading menus**

You can now display the items on a CM/ECF menu by hovering over its name on the main blue menu bar<sup>\*</sup>; moving the cursor to the name of a subordinate menu will list its components. You can still use the original menus as in previous releases, by clicking on the blue menu bar item. The screen below shows the cascading version of the Utilities menu displayed over the old version.



The speed with which a cascading menu displays varies according to how this option is used. If you click an item on the top menu bar to display the corresponding menu (as was previously required), the cascading menu will take longer to display when you subsequently move the cursor to one of those items; thus you are given time to use the old “click” technique before the cascading menu appears. Once you make a selection from a cascading menu, those menus will display quickly.

Because of changes made for the new menus, it is now possible to create a bookmark for any menu item. This allows you to put your most-used items on the browser's toolbar or in the bookmark menu; these can then be opened in different tabs or windows.

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\* Menu items can also be displayed by pressing the Alt key along with the letter that is underlined in the menu name, e.g., Alt-u expands the Utilities menu. The designated letter may differ with the browser.

## Case number lookup

The process of specifying the case you want has been made easier in most screens that require case number. Previously, you entered the year and number for a case and clicked the *Next* or other navigation button, or pressed Enter; if multiple cases matched, they were displayed on another screen with checkboxes for selection (no default selection was made).

Now, you can click *Next* (or other navigation button), press Enter or the space bar, or click the new *Find This Case* button (which appears as soon as you begin typing):

A screenshot of a web form titled "Case Number". It features a text input field containing the number "6-10012" and a button labeled "Find This Case" positioned to the right of the input field.

Matches are displayed on the same screen with radio buttons (the first case is selected by default); *Hide Case List* and *Show Case List* buttons allow you to control what you see.

A screenshot of the "Case Number" form showing search results. The input field contains "0:06-ap-10012" and a "Hide Case List" button is visible. Below the input field, two cases are listed, each with a radio button:
 

- 0:06-ap-10012 Zappos v. Murray
- 0:06-bk-10012 Meredith Murray

With the correct case selected, you must again click *Next* (or other navigation button), or press Enter, to proceed.

If you have clicked *Next* or pressed Enter and the case number you typed has only one match, processing continues with the next screen.

## Transcripts

This release implements a Judicial Conference policy to include official transcripts of court proceedings in electronic case files. After a transcript is filed with the court, it may be viewed (but not printed) in CM/ECF at a public terminal at the court. Any other access to the document is prevented for 90 days; there is no link to the transcript:

01/14/2008	18	Transcript regarding Hearing Held 11/15/07 RE: Motion. THIS TRANSCRIPT WILL BE MADE ELECTRONICALLY AVAILABLE TO THE GENERAL PUBLIC 90 DAYS AFTER THE DATE OF FILING, TRANSCRIPT RELEASE DATE IS 04/14/2008. Until that time the transcript may be viewed at the Bankruptcy Court or a copy may be obtained from the official court transcriber. Court Reporter/Transcriber Schilling, T, Telephone number 301-123-4567. Tape Number: 456. (RE: related document(s) 15 Hearing Held Filed by Weidenschilling, Lynn). Notice of Intent to Request Redaction Deadline Due By 1/22/2008. Redaction Request Due By 02/4/2008. Redacted Transcript Submission Due By 02/14/2008. Transcript access will be restricted through 04/14/2008. (Transcriber, L) (Entered: 01/14/2008)
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However, you may pay a fee to the court reporter or transcriber to gain access to the document; information about how to do this may be conveyed in the docket entry, as shown above, or may be sent to you in a notice. After your access has been set up by the court, the document number is a link to the transcript:

01/14/2008	<a href="#">18</a>	Transcript regarding Hearing Held 11/15/07 RE: Motion. THIS TRANSCRIPT WILL BE MADE ELECTRONICALLY AVAILABLE TO THE GENERAL PUBLIC 90 DAYS AFTER THE DATE OF FILING, TRANSCRIPT RELEASE DATE IS 04/14/2008. Until that time the transcript may be viewed at the Bankruptcy Court or a copy may be obtained from the official court transcriber. Court Reporter/Transcriber Schilling, T, Telephone number 301-123-4567. Tape Number: 456. (RE: related document(s) 15 Hearing Held Filed by Weidenschilling, Lynn). Notice of Intent to Request Redaction Deadline Due By 1/22/2008. Redaction Request Due By 02/4/2008. Redacted Transcript Submission Due By 02/14/2008. Transcript access will be restricted through 04/14/2008. (Transcriber, L) (Entered: 01/14/2008)
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If you access the transcript, PACER charges apply (with no page cap).

If an attorney in the case so requests, redactions can be made to the transcript before it is made available to all users. He must file the request with the court by a specified deadline and notify the court reporter/transcriber, who must then file a redacted transcript by the date set. This redacted version is immediately available to any user who has permission to view the original transcript; it will become available to all users after the 90-day restriction period. The original unredacted version will remain restricted except to those who have purchased it or are using a public terminal.

After the 90-day period, restrictions on the transcript document can be removed by court staff (from the redacted version, if one exists, or the original transcript). Then the document link is active for all users.

## Query

- Case Summary
  - The nature of debt is now displayed.
  - The case number of the lead case for an adversary proceeding is now displayed as a link to the docket report.
- Corporate Parents
  - This option is now labeled “Corporate Parents/Affiliates”, since parents and affiliates are now distinguished throughout the application.
  - On the output of this option, corporate parents are labeled “cp”, and corporate affiliates are labeled “ca”.
  - Instead of repeating party information for each corporate parent, this option now displays the party information once on the left side of the screen, with corporate parents and other affiliates listed to the right of the party.

- Deadlines/Hearings

The hearing judge is now displayed, and an option to sort by hearing judge has been added.

- Notice of Bankruptcy Case Filing

The filing date is now labeled as “Filed” rather than “Filed Electronically” since some cases were converted from manual filings.

## Reports

- Cases Report

- Previously, only a count of “Total number of cases” was displayed at the end of the report. Now, if you specify that both open and closed cases should be included, additional counts of open cases and closed cases are displayed.
- Previously, the party role was not shown (or included in extracted data) when the “Party information” box was checked. The role description is now displayed with the party name and included in the data.

- Claims Register

- Multiple creditor types can now be selected; the type of creditor is displayed on the search results list.
- Icons for pop-up calendars have been added for the “from” and “to” dates.
- If a claim has been transferred, or the claimant has been changed via editing, a “Claimant History” link is now displayed in the *Creditor* section.

<i>Creditor:</i> (106681232) H&H Collections 123 Main St. Boonton, NJ 07058 07058 <a href="#">Claimant History</a>	<b>Claim No: 2</b> <i>Original Filed Date:</i> 10/22/2007 <i>Original Entered Date:</i> 10/22/2007	<i>Status:</i> Filed by: CR Entered by: Weidenschilling, Lynn Modified:
Priority claimed: \$1349.00 <b>Total claimed: \$1349.00</b>		

- In the *History* section for each claim, there is now a “Details” link for each item which provides additional information.

<i>History:</i>			
<a href="#">Details</a>	2-1	10/22/2007	Claim #2 filed by H&H Collections, total amount claimed: \$1349 (Weidenschilling, Lynn)
	5	10/22/2007	Transfer of Claim. Transfer Agreement 3001 (e) 1 Transferor: IRS (Claim No. 2) To H&H Collections Filed by Weidenschilling, Lynn. (Weidenschilling, Lynn)

- Unless you are logged in with a CM/ECF account, you will no longer see the silver ball icon for the Notice of Electronic Claims Filing.

- Docket Report

➤ The selection screen has been rearranged and has new “Document options”; you may have one, two, or all three, depending on the court. This shows the part of the screen that has changed:

<p><b>Include:</b></p> <p><input checked="" type="checkbox"/> Terminated parties</p> <p><input type="checkbox"/> Links to Notices of Electronic Filing</p>	<p><b>Document options:</b></p> <p><input type="checkbox"/> Include headers when displaying PDF documents</p> <p><input type="checkbox"/> View multiple documents</p> <p><input type="checkbox"/> Create Appendix</p> <p><b>Format:</b></p> <p><input checked="" type="radio"/> HTML</p> <p><input type="radio"/> Text</p>
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- **Include headers when displaying PDF documents**

Each court has an option to display header information on submitted PDF files. The content, color, and location of the header is determined by the court. The displayed PDF is a copy of the original PDF file so the original file is never modified.

The “Include headers” option is disabled if you check the “Create Appendix” option (described below) since headers are always included in an Appendix.

- **View multiple documents**

This option allows you to view or download a set of selected PDF documents as one entity. If it is selected, “Format” options disappear and the “Create Appendix” option is disabled.

After you click *Run Report*, you are presented with a screen for selecting docket entries:

Filing Date	#	Select <a href="#">all</a> / <a href="#">clear</a>	Docket Text
12/12/2005	<a href="#">1</a>	<input type="checkbox"/>	Chapter 7 Voluntary Petition. Fee Amount \$ 274. Filed by Robbins, Catherine . (Robbins, Catherine) (Entered: 07/05/2006)
09/20/2006	<a href="#">2</a>	<input type="checkbox"/>	Amendment to List of Creditors. . Fee Amount \$ 20. Filed by Rebecca Walters. (Schilling, L) (Entered: 09/20/2006)
10/02/2006	<a href="#">3</a>	<input checked="" type="checkbox"/>	Report of Audit with Material Misstatement Identified. Filed by Weidenschilling, Lynn (Entered: 10/02/2006)
09/27/2007	3		Order Discharging Debtor (Admin.) (Entered: 09/27/2007)

View Selected

or

Download Selected



Clicking *View Selected* then displays a PDF file with all the documents that are associated with the selected entries. Clicking *Download Selected* produces a compressed (.zip) file which you can save to disk; each document within the compressed file is a separate PDF. A PACER billing receipt for the selected documents is shown before the PDF files are displayed or downloaded. If the amount of data to be displayed/downloaded exceeds the limit specified by the court, the display/download will not occur; file size information is shown so that you can make different selections. [Note: the process of preparing a set of PDFs for viewing or downloading may be lengthy, depending on the number of documents.]

A similar capability has been added to the Document Selection Menu, which is displayed when you click the document number link for a document that has attachments (in a docket report, a history/document query, etc.). Previously, each of these documents had to be viewed and saved separately. Now, you may see them together by clicking the *View All* button; a *Download All* option is also presented. Restrictions on the amount of data viewed/downloaded are as described above.

Document Selection Menu

**Multiple Documents**

Select the document you wish to view.

Part	Description	
<a href="#">1</a>	Ntc - Mtg of Creditors	2 pages
<a href="#">2</a>	Ntc - Mtg of Creditors: Notice Recipients	1 page

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or

3 pages

These buttons appear only if the court gives you permission.

- **Create Appendix**

This option produces a single PDF file that includes both a complete docket sheet AND images of the documents that you select (with PDF headers). If it is selected, "Format" options disappear, and other options are disabled. After you click *Run Report*, you are presented with a screen for selecting among the docket entries that matched the date and document number criteria; a "Footer format" box allows specification of the text that should appear on each PDF page. Clicking *View Selected* displays the Appendix file with all the documents associated with the selected entries. [Note: the process of preparing a set of PDFs for viewing may be lengthy, depending on the number of documents.]

- A single PDF is created from multiple documents by the “View multiple documents” and “Create Appendix” options. Each of the documents in the consolidated PDF may include links to other CM/ECF documents. The links in the consolidated document are the same as those in the original documents, so clicking one will display the referenced document in a new window, even if the referenced document is included in the consolidated PDF; you would thereby incur an additional fee. To avoid additional fees, you should check the link description and look for the referenced document in the consolidated document rather than clicking the link.
- On the report for an adversary proceeding, labels have been changed from “Related BK...” to “Lead BK...”. The “Lead BK Case” value is a link to the docket report for that case.
- A “Show Associated Cases” link has been added to the report, which displays a table of associations (same as the Associated Cases query).
- Correction: labels for dates displayed at the top of the report did not always reflect the correct origin of the case. For example, if a case was transferred within the district, the transfer date was labeled “Date Reopened”. Dates are now labeled correctly. If a case has been reopened multiple times, the “Date Reopened” label now is followed by the highest reopening number in parentheses.
- Calendar Events
  - Previously, if you specified one or more judges on the selection screen, the report would be limited to events in cases presided over by one of those judges. This selection item now applies to the hearing judge. Consequently, the “Judge” label on the selection screen has been changed to “Hearing judge”; the selection list now includes an “Unassigned” option, which selects events for which a hearing judge is relevant but no hearing judge has been assigned. The report shows both the hearing and case judge, if different.
  - A blank option for the “Office” selection item (all offices) has been added as the default.
  - The “Calendar events” label on the selection screen has been changed to “Type”.
- Docket Activity

The “Assets” value is now shown in the Case column.

- Judgment Index - new report

This report lists docketed events that the court has designated to be “judgments”. Here are the options:

Case number	<input type="text"/>		
Office	<table border="1"> <tr><td>Arlington</td></tr> <tr><td>Green Valley</td></tr> </table>	Arlington	Green Valley
Arlington			
Green Valley			
Case type	<table border="1"> <tr><td>ap</td></tr> <tr><td>bk</td></tr> </table>	ap	bk
ap			
bk			
Judgment filed between	<input type="text" value="4/18/2008"/> to <input type="text" value="4/28/2008"/>		
Sort by	<input type="text" value="Case Number"/>		
<input checked="" type="radio"/> Summary Text <input type="radio"/> Full Docket Text			
<input type="button" value="Run Report"/> <input type="button" value="Clear"/>			

This is an example of the report:

Judgment Index Report		
BK TEST U.S. Bankruptcy Court -- BANKRUPTCY COURT AO/DC CM/ECF		
Report Period: 10/1/2006 - 3/7/2007		
Case Number/Title	Judgment Description	Judgment Date
<a href="#">06-1020-0 Charles Mason</a>	Judgment for a Monetary Award Document: <a href="#">1</a>	02/10/2007
<i>Docket Text:</i> Order Granting Motion for a Monetary Award (Related Doc # [12]) Signed on 02/10/2007. (Donald, Hoeting)		
<a href="#">07-01030-4 RM Trenton v. Rest</a>	Notice of Renewal of Judgment Document: <a href="#">1</a>	01/10/2007
<i>Docket Text:</i> Order Granting Motion To Notice of Renewal of judgment (Related Doc # [12]) Signed on 01/10/2007. (Gaddie, Sujana)		

The case number/title link takes you to the docket report or query, depending on the court.

## Utilities

- Review Billing History

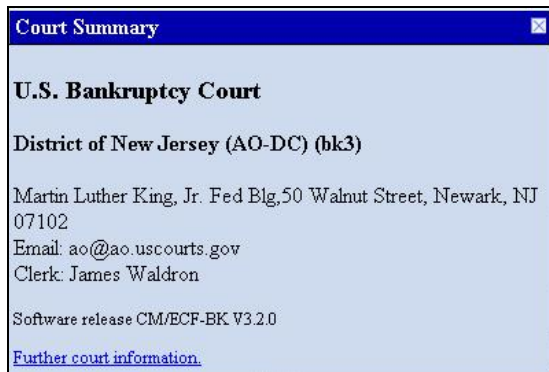
This option no longer runs a CM/ECF program on the court's server. Instead, you are automatically redirected to a PACER Service Center (PSC) server which produces the report. In a new window, you can search for transactions in the current and previous months for a specific court or all courts; data is retrieved from the PSC's central billing transaction database and formatted according to the options you select.

- Court Information

- The "Maximum Merge Document Size" has been added to the "Court Details" section:

Court Details	
Court's Name	BANKRUPTCY COURT AO/DC CM/ECF
Software Version	CM/ECF-BK V3.2.0
ECF Go Live Date	May 11, 2006
Maximum PDF File Size (MB)	3.0
Maximum Merge Document Size (MB)	10

- A summary of court information is now displayed if you click the CM/ECF logo; a link to display the full court information screen is included:



## Miscellaneous

- The browsers supported for the application are Internet Explorer 6 or 7 and Mozilla Firefox 2; Netscape should no longer be used.
- If you wish to use the keyboard rather than the mouse, pressing the Enter key now gives the same result as clicking the button that submits the screen in the functions listed below. Pressing the space bar will also work if the focus is on the button that submits the screen. Note: this key action was previously available for the CM/ECF Login screen and the Creditor Mailing Matrix.

The *Run Query*, *Run Report*, or *Submit* button:

Query

Query: Case File Location

Query: History/Documents

Query: Related Transactions

The *Run Report* button:

Cases Report

Claims Register

Docket Report

Docket Activity Report

Calendar Events Report

- Some help files have been modified so that you see only what is appropriate for you. For example, items previously marked as “court staff only” simply do not appear.
- Previously, when you displayed a PDF document and selected the “Save a Copy” option (Adobe Reader plug-in), a default file name of “show\_case\_doc.pdf” or “show\_claim\_doc.pdf” was shown. Now, a default name which varies with the browser is generated.
- Previously, the selection list resulting from a person search included only last, first and middle names, making it difficult to distinguish between similar persons. Now, the generation, first address line, city, and state are also displayed. This change was made throughout the application.
- Throughout the application, the label for Social Security number has been changed to “SSN / ITIN” since an individual tax identification number may be used instead of SSN; the label for the federal tax identification number has been changed to “Tax ID / EIN” to show that it is also referred to as “employer identification number”.
- Previously, when you moved among District, Bankruptcy, and Appellate court CM/ECF applications, there were some situations in which you were unable to change the client code. Now, you can change client code as needed.

- Document links
  - It is now possible for documents to include active links to documents in the original case. A document may also include a link to an attachment that is being filed in the same transaction. The link may point to the beginning of the document or to a specific page in the document.
  - If your Adobe Acrobat option to “Display PDF in browser” is NOT set, you may have problems with the display of screens when you view a document from a link. You can change the setting, found via the “Preferences” option on the Acrobat Edit menu; select the “Internet” category. Otherwise, you should contact the court so that they can make an adjustment to your setup.
  - When you click a document link on an NEF for which a free look is available, 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."

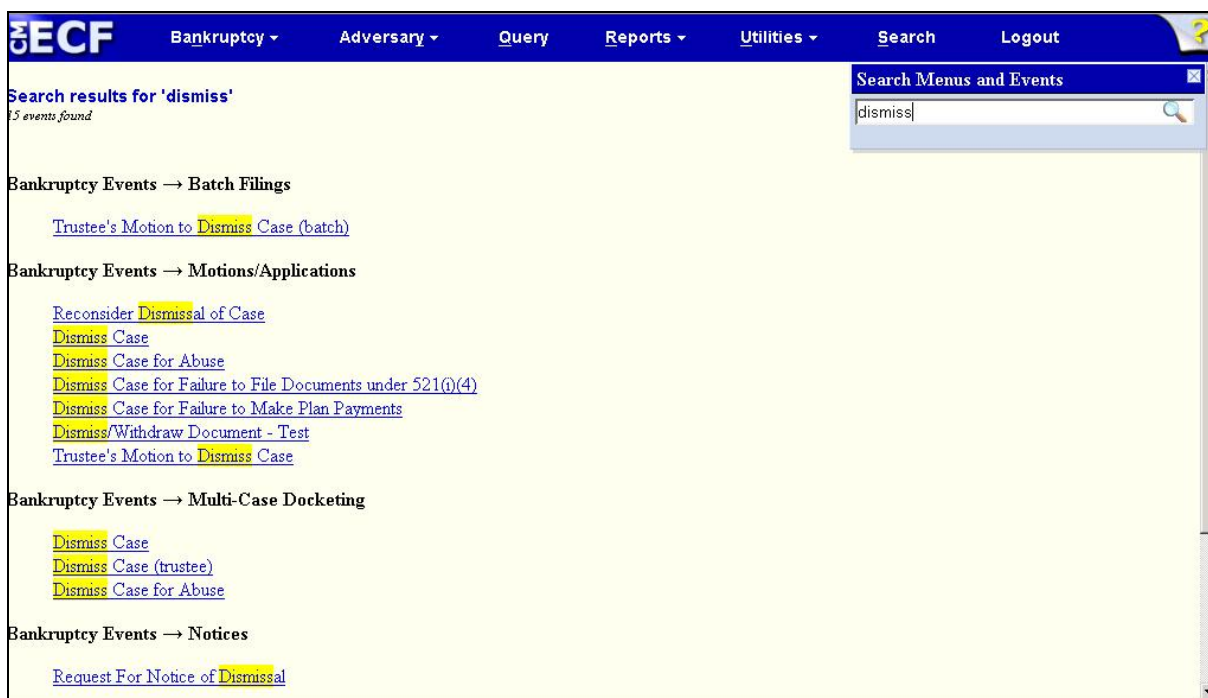
## Changes seen only when you are logged in with a CM/ECF account

### Search option

There is a new option to search menus and events. Click **Search** on the main blue menu bar. A small pop-up window appears for entering the text to be searched.



Once you enter text in the search box and click the magnifying-glass icon (or press the *Enter* key) the results are displayed on the screen, with the search string characters highlighted:



Each item is a link to the corresponding menu item or event, so you can go directly to it. Only letters and numbers are searched; other characters are ignored. For example, if you enter **judge-trustee** in the search field, **Judge/Trustee** appears in the results since "-" and "/" are not considered.

## Opening a Case

- Previously, a default value for the chapter of a bankruptcy opening might have been supplied. Now, the chapter has no default value, and a selection is required.
- Cases may be automatically assigned to a division based on the debtor's county. Previously, any confirmation or error messages displayed for that process showed only the code of the relevant county; now, all such messages include both the code and the county name.
- The Notice of Bankruptcy Case Filing (accessible via a link at the end of the case opening process) now labels the filing date as "Filed" rather than "Filed Electronically".
- Corrections:
  - If a case was being opened by the attorney, and the person selected as the debtor was already in the database as a creditor, the debtor was recorded as being pro se. Now, the filing attorney is correctly associated with the debtor.
  - When a tax ID was used to search for a party but there were no parties with that ID, the search returned an incorrect list of parties. Now, "No person found" is displayed if there are no matches on tax ID.

## Case Upload

- Previously, a payment window was displayed when the case was opened, and was refreshed for each docketed event. If you clicked "Pay Now" when the window first appeared, an error message was displayed. Now, only one payment window appears after all events have been docketed.

## Claims/Creditors

- Claim Filing - Search for Creditor
  - Previously, the initial "Search for Creditor" screen required the selection of a single creditor type. Now, the creditor type selection list includes a blank value so that creditors of all types can be retrieved. Also, multiple creditor types can be selected; the type of creditor is displayed on the search results list.
  - If creditors are returned from a search and you expand the pulldown list, holding the cursor over a creditor's name will now 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 will not see this display.



- If creditors are returned from a search, you may see a popup window when you select a creditor; it lists 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).

**Claims filed on behalf of creditor**

Ourisman Honda

1, (3)

**Is this the correct creditor?**

Yes No

- Previously, if no creditors were returned from a search, an empty selection list was displayed. Now, a “No creditors found” message is shown; in addition, there is a “Change search criteria” link which returns you to the “Search for Creditor” screen.
- Claim Filing – Proof of Claim
  - Previously, a claim was accepted as amending another claim only if the creditor selected for the amended claim was the same as the creditor for the original claim. Now, the amendment can have a different creditor.
  - There is now a *Find* button next to the “Amends Claim #” box:

Proof Of Claim Information For		
106688537 - Herson's Honda Gaithersburg, MD		
Case Number: 07-10012-0	Amends Claim #: <input type="text"/> <input type="button" value="Find"/>	Filed By: <input type="text" value="Creditor"/>
Last Date To File:	Date Filed: <input type="text" value="11/28/2007"/>	
Last Date To File(Govt):		

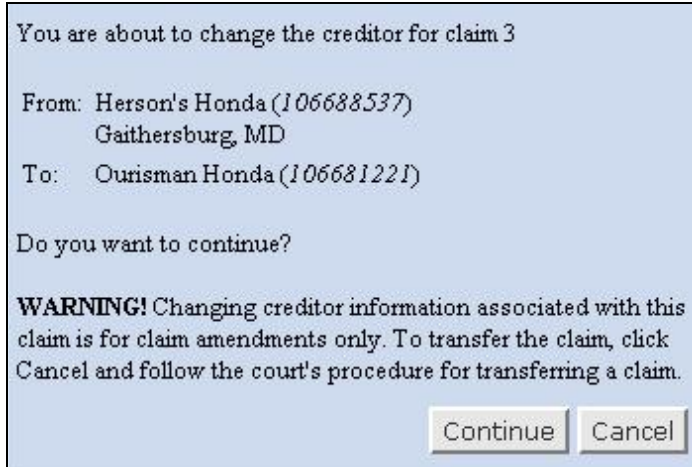
You can click this button to display claims that have been filed in the case in a separate window (if the original claim number is typed in the box first, only that claim is displayed):

Creditor Name	Claim # ↓	Date filed
Ourisman Honda	1	10/22/2007
H&H Collections	2	10/22/2007
Herson's Honda	3	12/10/2007
Modern Auto Body	4	01/14/2008

You can click the column header for Creditor Name or Claim # to sort the list by that item.

If you select a claim to be amended that was filed by the same creditor, the values from the original filing are copied into the Proof of Claim screen for editing.

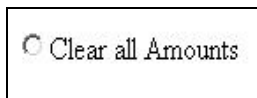
If you select a claim to be amended that had been filed by a different creditor, a confirmation/warning screen is displayed:



If you click *Continue*, values from the original filing are copied into the Proof of Claim screen for editing, as described above.

Note: this procedure should NOT be used to transfer a claim from one creditor to another.

- A new option has been added to the Proof of Claim screen so that you can easily clear the values that are displayed:



- Creditor Maintenance: add or edit a creditor

Members of the creditor committee are now designated as either an entity (business) or individual. An “Entity” checkbox has been added to the detail screens and is enabled if the “Yes” radio button is selected for “Creditor committee”.

- Claims Upload
  - Previously, a claim was accepted as amending another claim only if the creditor specified for the amended claim was the same as the creditor for the original claim. Now, the amendment can have a different creditor.
  - An *amendAction* tag must now be included for the addClaim function when amending a claim; the tag specifies whether all claim amounts should be cleared before the new amounts are recorded.
  - Previously, data submitted via the addClaim function was not required to include the filer of the claim (*claimFiledBy* tag). Now, the filer is required. Also, the creditor specified by the *creditorId* tag must have a creditor type of “cr”, or other code allowed by the court.
  - When a member of the creditor committee is being added (addCreditor function), the data file can now include a *creditorEntityIndiv* tag with a value of “e” or “i” to specify whether it is an entity (business) or individual.
  - The time shown on the Notice of Electronic Claims Filing generated by Claims Upload now reflects the time the transaction was processed, rather than the run time of the job that produces it.
  - Previously, the Claims Upload Log displayed zero values for “Amount” and “Creditor #” for an addClaim transaction with the *amends* tag. The correct values are now shown.

## Docketing

- Docket event search

When you 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:

The screenshot shows a search interface with a text box at the top containing the placeholder text "Start typing to find an event." Below the text box are two columns: "Available Events (click to select events)" and "Selected Events (click to remove events)". The "Available Events" list includes: Adequate Protection, Administrative Expenses (Application), Allow Claims, Allow Payment Arrearages, Amend, Amended Application, Amended Motion, Appear pro hac vice, Application (Generic), Appoint Creditors Committee, Appoint Examiner, Appoint Examiner, Appoint Trustee, Approve Compromise under Rule 9019, and Assume Lease or Executory Contracts.

Entering some characters from the event description will result in the full list being replaced by a list of just those events which match:

The screenshot shows the search interface with the text box containing "sanction" and the instruction "Click your selection, or use arrows to highlight it and press Enter." The "Available Events" list is filtered to show: Motion for Sanctions Under USC28 Section 1927, Sanctions, Sanctions Under Section 1927, Sanctions for Debtor's Attorney, Sanctions for Violation of the Automatic Stay, and Sanctions for Violation of the Discharge Injunction. The "Selected Events" list is empty.

Unless the label is "Selected **Event**", multiple events can be selected by holding the Ctrl key and clicking each event, and the events will appear in the "Selected Events" list.

- Previously, corporate parents/affiliates could only be added when a party was added during case opening. Now, some docket events may allow you to enter corporate parents and other corporate affiliates for a party.
- If a docket event allows you to enter multiple case numbers, and you paste in a case list (with Ctrl-V), the individual case numbers are now automatically entered into separate boxes and verified.

- Adding a party
  - Previously, when a docket event allowed you to add a new party following a search, only the search value for last name was carried over to the “Party Information” screen. Now, all search values are carried over.
  - The “Corporate parent” button on the “Party Information” screen is now labeled “Corporate parent / affiliate”. Previously, a search of existing persons was required only for the first corporate parent being added, so duplicate person entries were sometimes created. Now, a search is required for each corporate parent being added. Also, you must select the type (parent or affiliate) from a list.
  - When an attorney was added for a new party, the cursor was placed in the Bar ID field of the “Search for an attorney” screen. Now, the cursor is in the last name field.

- Application for payment of fees

The selection list for the type of professional no longer has a default value; you must make a selection in order to continue.

- When you are docketing an event that requires a fee, you are presented with various pop-up windows relating to payment. If you close one of these windows by clicking the X in the upper right corner, subsequent pop-up windows will no longer appear. The message warning against using the Back button now also warns against closing any of these windows by clicking the X.

- Notice of Electronic Filing (NEF)

- The language on the NEF regarding free looks has been changed:

\*\*\*NOTE TO PUBLIC ACCESS USERS\*\*\* Judicial Conference of the United States policy permits attorneys of record and parties in a case (including pro se litigants) to receive one free electronic copy of all documents filed electronically, if receipt is required by law or directed by the filer. PACER access fees apply to all other users. To avoid later charges, download a copy of each document during this first viewing. However, if the referenced document is a transcript, the free copy and 30 page limit do not apply.

[If the document is an opinion, the note says only that “There is no charge for viewing opinions”.]

- Previously, if you received a “Summary of ECF Edit Activity” email, you could click a link for an NEF receipt and view it without logging in. Now, you must provide a CM/ECF or PACER login before the receipt is displayed (no PACER charges are incurred).

## Reports

- [Claims Register](#)

As for the docket report, headers will be displayed on a PDF document filed with the claim if you have checked the “Add Headers to PDF Documents” option in the “Maintain Your CM/ECF Account” utility.

## Utilities

- [View Your Transaction Log](#)

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.

- [Maintain Your Account](#)

A new checkbox, “Add Headers to PDF Documents”, may appear on the screen. The checkbox allows you to choose whether PDF documents (submitted when an event was docketed or a claim was filed) will include header information when they are displayed by the application. However, the “Include PDF Headers” box on the Docket Report selection screen (whose default setting depends on that of “Add Headers to PDF Documents”) will override your general header preference for that particular docket report.