

## **U.S. Bankruptcy Court ECF Version 3.2 Overview of e-Filing Enhancements**

There are several enhancements to ECF that may make e-filing easier. This overview will cover:

### **PART I - The Basics - Page 2**

- Cascading Menus
- Search event option
- Filing two-part documents
- “Find This Case” option
- PDF Headers

### **PART II - More Advanced Enhancements - Page 7**

- Creating an Appendix through Docket Report
- Creating Hyperlinks within documents
- Public Access to Transcripts

Additional step-by-step information regarding the more advanced changes may be found on our website under ECF Reference → Bankruptcy Reference Guides.

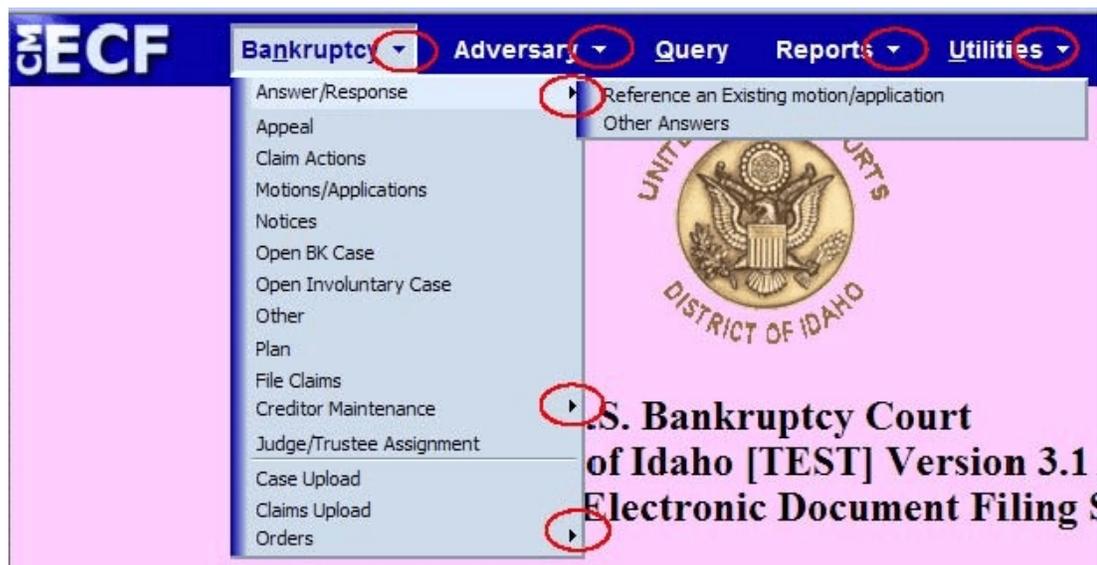
# PART I

## Cascading Menus

Cascading menus were introduced into ECF to save the user keystrokes when e-filing a document.

On the blue menu bar, next to each selection, a drop-down arrow appears. By placing your mouse over those arrows, a menu appears providing the user with filing options. Next to those menu items you may find another arrow that will provide you with specific options for each event selection. Once you click on a selection from any of the cascading menus, ECF will take you directly to that event filing without further keystrokes.

The user still has the option of viewing the entire menu as in previous versions of CM/ECF by clicking on the menu item from the blue menu bar. This will take you directly to the entire menu listing for that selection as in previous ECF versions.



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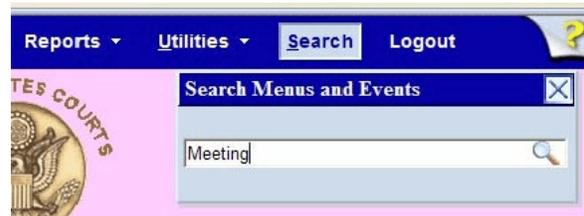
## Search

No longer does the user need to guess under what heading an event may be found. The new version of CM/ECF has added a “Search” function.



Clicking on **Search** displays the “Search Menus and Events” window.

Type as few as three letters in the text box and click the Magnifying Glass icon.



CM/ECF searches all the events and identifies possible matches. Those are displayed for the user to select from. The search will search Bankruptcy and Adversary event options.



Click on your selection, and ECF will take you directly to that event for filing.

## Filing Two-Part Documents

The new version of ECF has made it easier for filers to select multiple events when filing one document, i.e. a two-part motion.

**Note:** This is used when filing one PDF document that accomplishes multiple filing options. This is not intended for use with multiple documents filed in one transaction. Continue to use the attachment process when filing multiple documents within the same transaction.

### To find an event,

either scroll down the list using the scroll bar, or begin typing in the search box all or part of the name of the event. As you type, the list will shorten to match your entries.

The screenshot shows the ECF interface for filing a court document. At the top, there are navigation tabs: Bankruptcy, Adversary, Query, Reports, Utilities, and Search. Below this is the title 'File a Court document' and the case information: 07-02211-5-CB Oliver Hamilton. The document type is 'bk', Chapter '7 v', Office '5 (Maryland)', Judge 'CB', Assets 'n', and Case Flag 'FeeDueSTAY'. A search box contains the text 'Meeting of Creditors Chapter 7 (cr)'. Below the search box, there are two lists: 'Available Events (click to select events)' and 'Selected Event (click to remove this event)'. The 'Available Events' list is filtered to show only 'Meeting of Creditors Chapter 7 (cr)'. A red box highlights the search box and the filtered event list.

### To select an event,

Click on any entry in the "Available Events" list. By single clicking that adds the event to the Selected Events box.

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**Warning:** Once you click within the "Available Events" list, an event is added to the Selected Events list, even if you inadvertently click.

- Before you continue on from this screen, make sure that the selections listed in "Selected Events" are the ones you wish to continue with.
- You may remove a wrong selection by single clicking on it while it appears in the "Selected Events" list.

## Find This Case

The screen where a user enters the case number for which they are filing a document has been enhanced to include a “Find This Case” search option. Simply type in the case number in a simple form and click “Find This Case.” Notice that the “Next” button is grayed out.

Once a case number is typed, click **[Find This Case]** to begin the case number look-up process.



Case Number

6-10012 Find This Case

Matches are displayed on the same screen with radio buttons to allow for selection.



Case Number

0:06-ap-10012 Hide Case List

0:06-ap-10012 Zappos v. Murray

0:06-bk-10012 Meredith Murray

Click the radio button next to your case number.

Once a case number is selected, the **[Next]** button will become active.

Click **[Next]** to continue.



Bankruptcy ECF Adversary Queue

File a Motion

Case Number

4-07-bk-2211 Hide Case List

Select a case: (press space to hide them)

4-07-bk-2211 Joseph P. Gardner and Drew Gardner

5-07-bk-2211 Oliver Hamilton

Next Clear

## PDF Document Headers

PDF headers will now display with case information when selected by the user prior to running a Docket Report or Claims Register.

The screenshot shows the 'Docket Sheet' interface. Under the 'Document options' section, the checkbox 'Include headers when displaying PDF documents' is checked and highlighted in yellow. Other options include 'Terminated parties', 'Links to Notices of Electronic Filing', 'Public docket', 'View multiple documents', and 'Create Record on Appeal'. The 'Format' section has 'HTML' selected. The 'Sort by' dropdown is set to 'Oldest date first'. At the bottom, there are buttons for 'Run Report', 'Clear', and 'Make these options my default', along with a 'Schedule this to run' dropdown.

- The original PDF file is not changed, only the view.
- If the document is printed, the headers will also be printed.

## Maintain User Account

The user may also opt to view the PDF headers in every instance. On the user's "Main User Account" screen, check the box to turn-on this option for all instances.

The screenshot shows the 'Maintain User Account' form. The 'Add Headers to PDF Documents' checkbox is checked and highlighted with a red box. The form includes fields for 'Last name' (attorney), 'First name', 'Middle name', 'Generation', 'Title', 'Type aty', 'Office', 'Address 1', 'Address 2', 'Address 3', 'City', 'State', 'Zip', 'Country', and 'County'. The 'Type aty' field is currently empty.

## PART II

### Creating an Appendix

A new tool was introduced with this version of Bankruptcy CM/ECF which allows the user to create a PDF document that includes the complete docket sheet as well as selected documents. This is beneficial when creating an excerpt of record for an appeal.

Check the Create Appendix when running a Docket Sheet.

The screenshot shows the 'Docket Sheet' form in the Bankruptcy CM/ECF system. The 'Case number' is '1:08-bk-8'. The 'Include' section has 'Links to Notices of Electronic Filing' checked. The 'Document options' section has 'Create Appendix' checked, which is highlighted with a red box. The 'Format' section has 'HTML' selected. The 'Sort by' dropdown is set to 'Oldest date first'. There are 'Run Report' and 'Clear' buttons at the bottom.

The user may select which documents they wish to include by checking the box next to each docket entry. The box only appears for docket entries that have an associated PDF.

The screenshot shows a table of docket entries. The table has columns for 'Filing Date', '#', 'clear', and 'Docket Text'. The third entry is selected, and its 'clear' checkbox is highlighted with a red box. Below the table, the 'Footer format' field is set to '<pagenum>' and is highlighted with a red arrow. A 'View Selected' button is at the bottom.

Filing Date	#	clear	Docket Text
02/26/2008	1	<input type="checkbox"/>	Chapter 9 Voluntary Petition - Receipt Number 123456789, Fee Amount \$839 Filed Donald Duck (Ward, Doug) (Entered: 02/26/2008)
06/06/2008	2	<input type="checkbox"/>	Motion to Appoint Examiner Filed by U.S. Trustee Jeffrey G Howe (attorney) (Entered: 06/06/2008)
06/06/2008	3	<input checked="" type="checkbox"/>	Motion for Access , Motion to Amend (related document(s) 1 Voluntary Petition (Chapter 9)) Filed by U.S. Trustee Jeffrey G Howe (Attachments: # 1 Affidavit of Attorney# 21 Support) (attorney) (Entered: 06/06/2008)

The final document will be page numbered.

### **Cross-Document Hyperlinking**

CM/ECF users can file PDF documents that include hyperlinks to:

- Previously filed documents in the same case,
- Previously filed documents in other cases that reside in our Bankruptcy or District's CM/ECF database.
- Previously filed documents in cases that reside in other court's CM/ECF databases.
- Documents being filed as attachments to your current filing

### **Hyperlinking Highlights:**

- Cross-Document Hyperlinks applies only to documents associated with *CM/ECF* docket entries.
- Hyperlinks may link to the start of a document, or to a specific page in the document.
- Users can file main documents that include hyperlinks to attached documents that are part of the same docketing transaction.
- Hyperlinks to CM/ECF documents are retained as long as the case remains in the primary CM/ECF database.
- Hyperlinks to restricted documents are not accessible unless users have appropriate permissions. So linking to sealed documents may be beneficial to the court but not accessible to outside users
- Any documents that includes a hyperlink must also include the standard citation to the hyperlinked material. The hyperlink is a convenience, not a citation replacement.
- CM/ECF does not verify the hyperlinks within the documents. Therefore, they must be correct or they will not work.
- Cross-Document Hyperlink functionality works with WordPerfect 11 or higher, and Word 2002 or higher.

*See the on-line Bankruptcy Reference Guides for step-by-step information when working with WordPerfect or WORD documents.*

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**Public Access to Transcripts**

During the first 90-days after filing, access to the transcript is only available to court users and those parties having purchased a copy of the transcript from the court reporter/transcriber. Any other access to the document by non-court users is prevented for the initial 90 days.

Exception: The only exception during the initial 90-days is the transcript may be viewed (but not printed) by anyone at any public terminal in the courthouse.

For the purchasing party, they will have a copy of the transcript as well as the ability to gain access to the document via PACER

**Transcript Redaction Process:**

The Federal Rules require that personal information be redacted from documents filed with the Court. Therefore, upon filing of the original transcript, the attorneys must review the the transcript for redactable information.

If an attorney requests, redactions may be made by the Court Reporter or Transcriber during the initial 90-days before it becomes available to the public.

*See the on-line Reference Guides for complete instructions.*