



Bankruptcy CM/ECF Release 4.1 Changes for External Users

Introduction

On October 11, 2011, the United States Bankruptcy Court for the District of New Mexico will upgrade from CM/ECF Version 3.4 to CM/ECF Version 4.1. This is a major software upgrade with many new features that are likely to affect the way you file.

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ADVERSARY CASE OPENING – ATTORNEYS/TRUSTEES

Attorneys will no longer have to create an association with the plaintiff when filing a complaint to open an adversary proceeding. The filer is automatically linked as the plaintiff's attorney.

The “Attorney” button has been replaced with an “Add additional attorney” button to enter co-counsel, if any, otherwise do not use this button.

Plaintiff Information
Lori Partridge SSN / ITIN:Unknown

Office Address
Address 2 Address
City S
County ar
Phone
E-mail
Party text

Role in Bankruptcy Case

- During adversary filing, the filer could previously add the defendant's attorney to the case while adding the defendant. Now, the attorney opening the adversary will not be able to add the attorney for the defendant.

BANKRUPTCY CASE OPENING – ATTORNEYS

□ The county codes for every State in the USA are available during the case opening. When the USPS State abbreviation is entered on the debtor information screen every county for that State will appear in the County drop down box.

City	Canton	State	OH	Zip	44702
County	STARK-OH (39151)	Country			
	STARK-OH (39151)				
	SUMMIT-OH (39153)				
	TRUMBULL-OH (39155)				
	TUSCARAWAS-OH (39157)				
	UNION-OH (39150)				

CLAIMS - ALL USERS

Claim Filing – Proof of Claim

Proof Of Claim Information For		
19835 - No Such Company, Inc PO Box 000 Albuquerque NM 87102		
Amends Claim #:	<input type="text"/>	Filed By: Creditor
Date To File:	Date Filed: 09/01/2011	
LA Date To File(Govt):		
Amount Claimed	Secured	Priority
<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>Enter the Total Amount of Claim as of Date Case Filed (incl. secured, priority, general unsecured & unknown)</i>	<i>If all or part of your claim is secured, enter the secured amount (Box 4 on claim)</i>	<i>If all or part of your claim is entitled to priority, enter the priority amount (Box 5 on claim)</i>
Description:	<input type="text"/>	
Remarks:	<input type="text"/>	
Amend options: <input type="radio"/> Clear all Amounts		
Next	Clear	

□ The Proof of Claim entry screen text and formatting have been modified to match the B10 form. Additionally, the amount claimed and amount allowed totals are no longer calculated. Instead, the “Amount claimed” and “Amount allowed”

fields constitute the totals of the various amounts claimed and allowed; the user enters the totals in these fields, and no additional total is calculated.

- The total amount of the claim should be entered into the *Amount Claimed* field.
- The unsecured or unknown amounts can no longer be entered.
- Proof of Claim Notice of Electronic Claim Filing (NECF) previously did not show the types of claim amounts requested. Now the amounts provided are as follows: Amount Claimed, Amount Secured, Amount Priority.
- The “File another claim” hyperlink was previously displayed at the bottom of the Proof of Claim NECF. Now the hyperlink has been moved to the top of the receipt for easier access.

Claims Activity

- For any closed case, the case closed date is displayed on the report output.

Claims Register

- Previously, the “Entered by” field displayed the original filer, even if a more recent claim amendment or part was filed by a different user. Now the “Entered by” field displays the filer of the most recent claim record.
- Previously, when a claim was transferred via a Transfer Agreement, the filer to whom the claim was transferred was listed as the filer of the original claim. This was incorrect and inconsistent with the information displayed on the Claims Register. Now the original filer name is displayed for the original claim.

FEES/PAYMENTS DUE (Pay.gov) - ATTORNEYS/TRUSTEES

Internet Payments Due

- Previously, when an Internet payment was made, all fees incurred up to the time of payment had to be paid at once. Now you may choose to pay some or all of the fees in a given transaction and by various forms of payment.
- On the “Internet Payments Due” screen, all outstanding fees are displayed, along with a check box for each fee. To select the fees to pay, the user should check the boxes next to the desired fees, and then click the *Next* button.

Internet Payments Due

Select all

Check Fees to Pay	Date Incurred	Description	Amount
<input type="checkbox"/>	2008-07-22 08:29:23	Voluntary Petition (Chapter 7)(08-10079-7) [caseupld,1027u] (200.00)	\$ 200.00
<input type="checkbox"/>	2008-07-25 12:25:50	Voluntary Petition (Chapter 7)(08-10082-7) [caseupld,1027u] (200.00)	\$ 200.00
<input type="checkbox"/>	2009-08-31 09:33:34	Voluntary Petition (Chapter 7)(09-01092) [misc,volp7a] (200.00)	\$ 200.00

Next Clear

- To avoid problems with pop-up blockers among various browsers, the pop-up window previously generated by a pay.gov transaction is now displayed as a panel. This panel appears as a part of the original application window, so it is not affected by pop-up blocker settings.
- Filers paying filing fees over the Internet now have the option to pay by bank account debit, Automated Clearing House (ACH) payment.
- After confirming the selected fees to pay, you are asked for payment information to pay the fees selected, either by credit card or by bank account debit (ACH). The bank account debit (ACH) screen below is displayed by the Treasury Department site:

Step 1: Enter Payment Information

1 | 2

This item is payable by [Bank Account Debit \(ACH\)](#) or [Plastic Card \(ex: VISA, Mastercard, American Express, Diners Club, Discover\)](#)

Option 1: Pay Via Bank Account (ACH) [About ACH Debit](#)

Required fields are indicated with a red asterisk *

Account Holder Name:	<input type="text" value="Monica Neumark"/>	*
Payment Amount:	\$548.00	
Account Type:	<input type="text" value=""/>	*
Routing Number:	<input type="text" value=""/>	*
Account Number:	<input type="text" value=""/>	*
Confirm Account Number:	<input type="text" value=""/>	*
Check Number:	<input type="text" value=""/>	

Routing Number Account Number Check Number

⑆026946783⑆ 9243767390 1234

Payment Date:	<input type="text" value="10/13/2009"/>	*	(MM/DD/YYYY)
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Select the "Continue with ACH Payment" button to continue to the next step in the ACH Debit Payment Process.

To pay by bank account debit, enter the required information and click *Continue with ACH Payment*. The credit card process remains the same.

LOCKOUTS

- All fees must be paid by 11:59 p.m., Mountain Time, on the day of filing. If all fees are not paid by 11:59 p.m. on the day of filing, CM-ECF will automatically lock your account.
- You can click on the link in the e-mail or login to CM-ECF and go to, "Your Account" under the Utilities menu to pay the fees. You will not be able to file any documents until you have paid the filing fees from the previous day. **Court staff can no longer unlock your account or accept payment over the phone.** The only way an account can be "unlocked," is to pay the fee through Pay.gov. Once the fee is paid, the account will automatically unlock.

FEE RELATED EVENTS – ATTORNEYS/TRUSTEES

These events were modified to allow deferred, not due, and waived options depending on the party type:

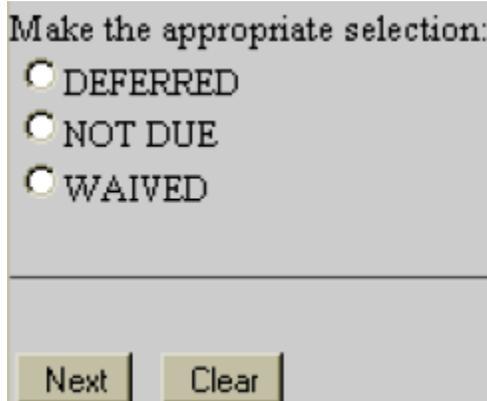
- Complaint
 - Notice of Removal
 - Motions to Reopen Chapter 11, 12, 13, 7, and 9 Cases
 - Abandonment of Property (Motion to Compel)
 - Notice of Appeal
 - Notice of Cross Appeal
 - Stay (Motion for Relief)
 - Withdrawal of Reference (Motion)
- A quality check will be performed by the Clerk's Office to ensure the proper party type and fee statuses were selected.
- A new drop down box has been added and the question must be answered to continue docketing.

Under 28 USC Sec. 1930, is the Fee Deferred, Not Due, or Waived?

Yes ▾

Next Clear

Answering **yes** pulls up this screen which is different than the one in CM-ECF Version 3.4



Make the appropriate selection:

DEFERRED

NOT DUE

WAIVED

Next Clear

If the party filer added to a case is a Child Support Creditor or their representatives or the United States, you must select the appropriate role type from the drop down list **to ensure that no fee is charged for filing a fee related document.**

- Child Support Creditor (csc:pty)



Role Child Support Creditor (csc:pty)

- United States (us:pty)



Role United States (us:pty)

A quality check will be performed by the Clerk’s Office to ensure the proper role type and fee status were selected. ***NOTE: If a child support creditor or its representative or the United States filed documents prior to the upgrade where the party role type was “creditor” the filer must “create new party” and select the new role type to ensure no fee is charged for filing a fee related document.***

INSTALLMENT PAYMENTS – ATTORNEYS

Attorneys may now file a bankruptcy case in which the filing fee will be paid in installments, and choose to either not make a payment, or make a partial payment at the time of filing.

No payment at time of filing:

You have selected the fee status of **Installment**.

Please enter the exact amount that is being paid with the filing of this petition.

Fee: \$

Partial payment at time of filing:

You have selected the fee status of **Installment**.

Please enter the exact amount that is being paid with the filing of this petition.

Fee: \$

The final docket text for a partial payment appears as shown below:

Docket Text: Final Text

Chapter 7 Voluntary Petition. Receipt Number: **INSTALL, Fee Amount \$75.00** Filed by Stella Brown. (atycoll, April)

That amount will appear in the Internet Payments Due box upon completion of case opening.

Summary of current charges		
Date Incurred	Description	Amount
2011-05-03 15:45:28	Voluntary Petition (Chapter 7)(11-10200-7) [misc,volp7a] (75.00)	\$ 75.00
		Total: \$ 75.00

INTERNET BROWSERS - ALL USERS

Release 4.1 was tested and works correctly with Firefox 3.5, and Internet Explorer 7 and 8.

NOTE: Mozilla Firefox 2 and Internet Explorer 6 are no longer supported.

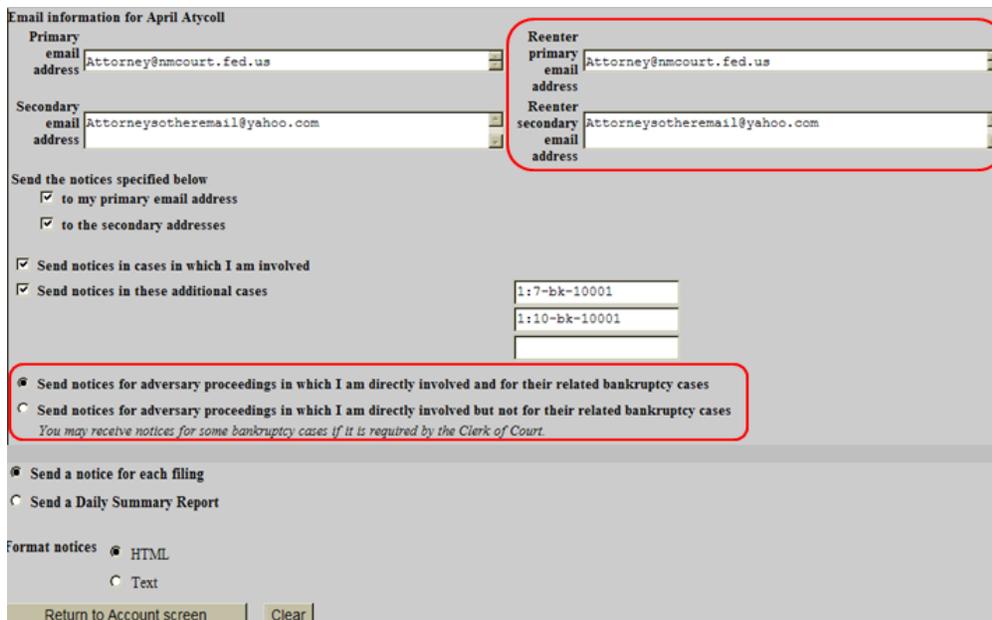
WARNING when closing CM/ECF – Click OK to continue



MAINTAIN YOUR ECF ACCOUNT (E-Mail Notification) - Attorneys/Trustees

You will be prompted to re-enter your primary and secondary e-mail addresses; the address is not saved until the fields match.

You now have the option through 'Maintain Your ECF Account' to decline notices of electronic filing of bankruptcy matters when you represent parties in an adversary proceeding and have no direct involvement in the bankruptcy case. Currently, attorneys receive all e-mail notifications from both cases.



Email information for April Atycoll

Primary email address: Attorney@nmcourt.fed.us

Secondary email address: Attorneysotheremail@yahoo.com

Reenter primary email address: Attorney@nmcourt.fed.us

Reenter secondary email address: Attorneysotheremail@yahoo.com

Send the notices specified below

- to my primary email address
- to the secondary addresses

Send notices in cases in which I am involved

Send notices in these additional cases

1:7-bk-10001

1:10-bk-10001

Send notices for adversary proceedings in which I am directly involved and for their related bankruptcy cases

Send notices for adversary proceedings in which I am directly involved but not for their related bankruptcy cases

You may receive notices for some bankruptcy cases if it is required by the Clerk of Court.

Send a notice for each filing

Send a Daily Summary Report

Format notices HTML

Text

Return to Account screen | Clear

MISCELLANEOUS – ‘Enter’ Key Function – ALL USERS

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. Pressing the space bar also works if the focus is on the button that submits the screen.

NOTE: *This key action was previously available on a number of screens throughout the application, but has been enhanced to be available on all screens.*

NEW EVENTS IN CM/ECF – ATTORNEYS/TRUSTEES

These are the new events available to attorneys and trustees:

- Motion to Bar Debtor
- Motion to Seal Document
- Motion to Seal Case
- Motion to Unseal Case
- Motion to Extend/Limit Exclusivity Period

Note: A Notice of Electronic Filing (NEF) will be electronically mailed when a *Motion to Approve Compromise under Rule 9019* is filed regardless if a filer has chosen to decline notices of electronic filing in a bankruptcy case that they have no direct involvement. This is also true when *BNC Certificate of Notice* is docketed.

NOTICE OF REMOVAL – ATTORNEYS

- Click the **Complaint** drop-down arrow to **change complaint from “y” (yes) to “n” (no)**.
- A **Counsel for** selection option appears so the filer can indicate which party the attorney is representing.

Open Adversary Case

Case type ap
 Date filed 9/2/2011

Complaint n -

Counsel for plaintiff -
 plaintiff
 defendant

Next Clear

- If the default **“Plaintiff”** is selected, then the filing attorney is automatically associated with the plaintiff.
- If **“Defendant”** is selected, the filer must click the **attorney** button when adding the **defendant information** to add herself/himself as the attorney for the defendant.
- Defendant’s attorney can add the Plaintiff’s attorney from the state court proceeding.
- Add additional attorney button displays

Add additional attorney...

- Plaintiff’s attorney cannot add an attorney for the defendant

Alias... Corporate parent / affiliate...

Submit Cancel Clear

NOTICING – ALL USERS

□ **BNC Certificate of Notice:** When a document is being noticed to recipients through the Bankruptcy Noticing Center (BNC) and through CM/ECF Notice of Electronic Filing (NEF), the BNC Certificate of Notice filed with the Clerk’s Office will now reflect notices by first class mail, by electronic transmission by the BNC, and entities noticed through the court’s CM/ECF electronic mail system. Information regarding who was noticed by NEF, and when they were noticed, will be appended to the BNC Certificate of Notice.

The following persons/entities were sent notice through the court's CM/ECF electronic mail (Email) system on August 9, 2011 at the address(es) listed below:

Joe Attorney on behalf of Debtor Ima Debtor Joeattorney@office.com
JoesAssistant@office.com

□ **E-mailed Bypass Notice to Debtors’ Attorneys:**

The court uses the BNC to mail notices, but the BNC can only do so if an address is valid. If an address is not valid, the United States Postal Service (USPS) treats this as sending mail to an undeliverable address.

The BNC bypasses notices with undeliverable addresses from printing and mailing. The BNC sends notification to the debtor’s attorney (or *self-represented* debtor) when a notice to an intended recipient on the mailing list is bypassed. Currently, the BNC sends filers printed and mailed bypass notices associated with the court’s issuance of the § 341 notice. The change provided will result in notification of undeliverable addresses for all notices transmitted by the BNC to the attorney for debtors primary e-mail address on file with the court. You will no longer receive paper bypass notices mailed by the BNC.

□ Previously, when a party was terminated, the terminated party did not receive notice of the event. Now the terminated party is included in the noticing list for that one event that ends their interest in the case (e.g. withdrawal as attorney).

□ **E-mail 341 Notices to Debtor’s Attorneys:** Currently, you receive the 341 notice by Notice of Electronic Filing (NEF) with the debtor’s redacted Social Security Number (SSN) and by U.S. Mail through the BNC with the debtor’s full SSN.

The Bankruptcy Noticing Center (BNC) will begin sending the debtor's attorney one summary e-mail per day containing secure hyperlinks to the unredacted 341 notice in place of printing and sending the notice via the United States Postal Service. These notices will be sent to the primary e-mail address listed on the ECF account. *You will no longer receive the paper 341 notice from the BNC.*

A sample BNC e-mail notification is provided at the following web page:
<http://ebn.uscourts.gov/documents/Attorney341Email.pdf> .

PDF/A - ALL USERS

PDF/A is an International Standards Organization (ISO) standard document format. The standard has been published for almost five years and is available in the current versions of all major bankruptcy software vendors, word processors and scanning systems. It is a subset of the PDF standard which excludes those PDF features that give rise to concerns about the ability to archive documents.

Portable Document Format/Archive (PDF/A) Facts

- PDF/A is an archival format for long term preservation of a document
- Electronic or scanned paper documents can be converted to PDF/A
- All fonts are embedded and the file is uncompressed
- PDF/A documents are typically larger than a standard PDF document
- PDF/A documents do not contain audio and video content

Most PDF creation software packages can create PDF/A documents. Additional information can be found on our web site at [PDF/A information](#).

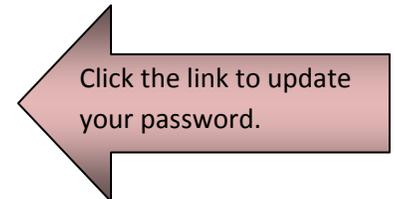
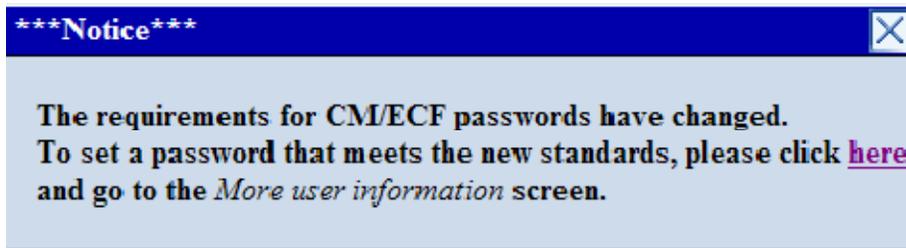
NOTE: PDF/A use is optional until notified by the court otherwise.

PASSWORD SECURITY - ALL USERS

Password security has been improved. All CM/ECF passwords must be a minimum of 8 characters with a maximum of 16 characters, and must include both upper and lower-case alphabetic characters and at least one digit or special character [e.g., 0-9, @, #, \$, %, &, *, +, :].

After five invalid login attempts, your account is locked out for a five-minute waiting period. Each subsequent invalid entry increases the resulting lockout period.

- The **first time you log in**, you will see the following message if you are able to maintain your own account; if not, a similar message will appear:



- CM/ECF Version 4.1 allows you to maintain your password separately from other account information and actions. You will no longer change your password through “Maintain Your ECF Account.” Instead, you will use the Change Your Password link that now appears in the Utilities menu.



Change Your Password

Login stycoll

Passwords must have at least 8 characters, both uppercase and lowercase letters, and at least one digit or special character (e.g., @,%&*)

New password

Re-enter new password

PRIVACY - ALL USERS

Cases filed prior to December 1, 2003

All documents, including claims, filed electronically (by the court or external filers) in cases prior to December 1, 2003 that have been closed for at least one year will be restricted to ONLY court staff and the public terminals located at the Clerk's Office.

Restricted and Sealed Documents

If a document has been restricted by the court the Notices of Electronic Filing (NEF's) will display the following message for the docket text for users who have access:

"Restricted. Please log into CM/ECF to access this information."

Unless granted access to a sealed or private entry, the PACER user will not see the docket entry at all. It will appear as though the docket number has been skipped.

Sealed Cases

Attorneys who view the cases report may see skipped case numbers. If a case is sealed, it will not appear on this report unless they have been granted access to the case.

Statement of Social Security Number

The filer of the Statement of Social Security Number can now view the document in PACER. This message appears before you open the document:

The document you are about to view is restricted; protect it from unauthorized viewing.

View Document

QUERY - ALL USERS

Select a Case

There were 5 matching persons.

There were 5 matching cases.

Name	Case No.	Case Title	Chapter / Lead BK case	Date Filed	Party Role	Date Closed
Green, Valerie (pty) (1 case)	02-59757-KCF7	Valerie Green	7	09/30/02	Debtor	01/15/03
Green, Valerie L. (pty) (1 case)	00-51302-RTL	Cornelius Green and Valerie L. Green	13	02/09/00	Debtor	02/10/03
Green, Valery J. (pty) (1 case)	99-15931-GMB	Valery J. Green	13	06/28/99	Debtor	N / A
Greene, Valerie A. (pty) (1 case)	01-13362-1-JHW	Richard W. Petravich and Valerie A. Petravich	13	04/03/01	Debtor	11/29/01
Greene, Valerie A. (pty) (1 case)	02-11264-1-JHW	Richard W. Petravich and Valerie A. Petravich	7	02/08/02	Debtor	08/26/02

- When a name search is made, additional information, such as case number, case title, chapter/lead case, date filed, and date closed, is now displayed on the results page to allow a user to select the correct case.
- For each name result, a row of information is displayed for each case in which that person is involved.

View Document

11-10201-s7 Patty Peppermint
Case type: bk Chapter: 7 Asset: No Vol: v Judge: James S. Starzynski
Date filed: 05/03/2011 Date of last filing: 05/31/2011

Query

- [Alias](#)
- [Associated Cases](#)
- [Attorney](#)
- [Case Summary](#)
- [Creditor](#)
- [Deadline/Schedule](#)
- [Docket Report ...](#)
- [Filers](#)
- [History/Documents](#)
- [Notice of Bankruptcy Case Filing](#)
- [Parties](#)
- [Related Transactions](#)
- [Status](#)

Trustee
View Document
Filing Fee
Corporate Parents/Affiliates
Claims Register
Creditor Mailing Matrix

- Previously, there was no way to view a document without first viewing the docket report. Now, a “**View Document**” link on the Query menu allows you to enter a document number in the case and view the document without having to run a docket sheet. This feature will enable PACER users to eliminate charges for first accessing the docket report.

- A warning message has been added to the Query search screen to remind PACER users that there is no 30-page PACER billing cap on the information returned from these searches.

Query

Warning: you will be billed for the total number of pages (this report is not subject to the 30-page limit on PACER charges)

Search Clues

Case Number

Last / Business Name (Examples: Desoto, Des*)

First Name Middle Name

SSN / ITIN Tax ID / EIN

Type Open cases Closed cases

REPORTS – ALL USERS

Cases Report

- An option to filter the report by attorney name or Bar ID now appears on the selection screen. When a name is entered, a list of matching attorney names is displayed, of which you may select one or more. Check boxes allow you to search for attorneys by party role: debtors, plaintiffs, defendants, creditors, or all. Alternatively, you can choose to view only cases with pro se filers.

Warning: you will be billed for the total number of pages (this report is not subject to the 30-page limit on PACER charges).

Office Case Type Chapter

Trustee

Attorney

Last name

First name

Bar ID

Attorneys for:

Debtors Plaintiffs Defendants
 Creditors All

Found, click to select

Selected, click to remove

Date Type From to

Open cases Closed cases

Party information
 Pro se cases only

□ The report is now limited to a range of 31 days. This prevents internet users from unintentionally requesting a large data set, which would result in an unnecessarily large PACER fee.

□ IF a case is opened as SEALED (only court staff have access to open a sealed case) it will appear on the cases report without the hyperlink or a case title. This report displays the case number, entered and filed dates, office, and generic case title text according to case type: “SEALED” for bankruptcy cases, “SEALED v. SEALED” for adversary and miscellaneous proceedings.

Note: the fields displayed are the only fields by which sealed cases may be filtered; if other search filters are used (e.g., chapter, judge), those filters will not affect which sealed cases appear on the report.

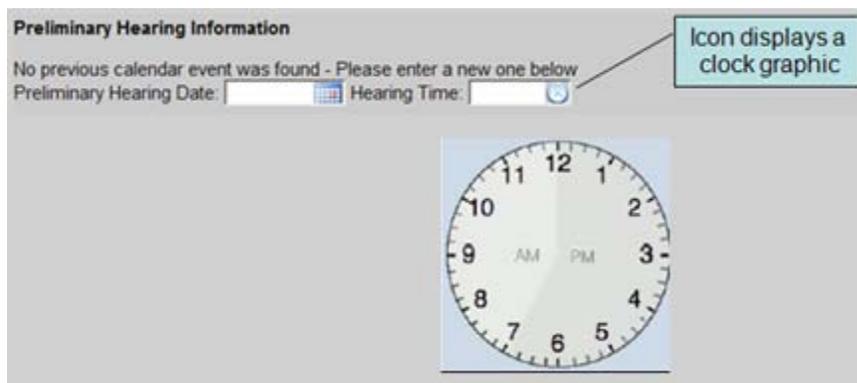
11-10377-13 *SEALED*	bk		Sealed		Filed: 07/28/2011 Entered: 07/28/2011	Office: Albuquerque
11-10378-7	bk	7	July Baby Attorney for Debtor: Melissa Romero : Pro se		Filed: 07/29/2011 Entered: 07/29/2011	Office: Albuquerque Assets: No Fee: Paid County: CHAVES-NM

□ IF a case is opened and SEALED after opening it will NOT appear on the cases report so the report will skip sealed cases and the report will appear to be have a gap between case numbers.

Calendar Report

- The Calendar Events selection screen now includes:
 - Two date fields to generate this calendar for one or more days
 - Calendar icons to set the dates
 - A new trustee sort option
 - An option to automatically display related proceedings as a default view either expanded or collapsed

- New clock graphic icon to set the time or continue to enter the time by clicking in the hearing time field



Docket Activity

- The report is now limited to a range of 31 days. This prevents internet users from unintentionally requesting a large data set, which would result in an unnecessarily large PACER fee. ***NOTE:*** This may also interfere with bankruptcy software programs and trustee software programs.

Docket Report

- The County of residence is now displayed along with the address information on the report output for debtors and joint debtors.
- The "Show Associated Cases" hyperlink appears **ONLY** when an active association exists.
- Each alias is printed on one line.
- The attorney's information includes an active hyperlink to the attorney's primary e-mail address.
- The U.S. designation was added to the top of the docket sheet

U.S.

Bankruptcy Court
New Mexico TEST Database (Albuquerque)
Bankruptcy Petition #: 11-10201-s7

Assigned to: James S. Starzynski
Chapter 7
Voluntary
No asset

[Show Associated Cases](#)

Date filed: 05/03/2011

Debtor
Patty Peppermint
25 Oak St
ABQ, NM 87102
BERNALILLO-NM
SSN / ITIN: xxx-xx-8888

represented by **April Atycoll**
500 Gold Ave SW
10th Floor
Albuquerque, NM 87102
Email: Primarvattorevemai@nmcourt.fed.us

aka Patricia Peppermint
dba Patty's Peppermints

RSS FEED TECHNOLOGY - ALL USERS

We now offer an RSS feed with links to docket sheets and documents. A standard RSS reader is not provided with CM/ECF, but the software supports the readers included with the standard supported browsers. The feed allows you to keep up with case information you are interested in by providing notification every time a docket entry is made within the last twelve hours. A link to the docket sheet and document is available as part of the feed – except to documents that are private, restricted, or sealed. The information in the feed is searchable by case number, date, or title.

There are no PACER fees when viewing the feed. However, if you click on a case number hyperlink to view the docket sheet, or the document number hyperlink to view the document, you will be prompted to login, and will incur the standard PACER fees for any information accessed.

To access the RSS Feed option, login to CM/ECF and you will see the menu item under Utilities > Court Information. At any given time, the feed displays all entries that have been docketed within the last 12 hours. Depending on your browser settings you might need to click refresh to receive the most recent activity.

You may also subscribe to the feed by clicking on the CM/ECF logo at the top left portion of the CM/ECF main page. A Court Summary screen will appear.

Click the Further Court Information link. A Subscribe with Live Bookmark screen will appear. Click the Subscribe button.

TRUSTEE'S 341 FILINGS – TRUSTEES

The **Trustee's 341 Filings** program has been enhanced to include the option to:

- Continue multiple 341 meetings at one time.
- Add customized text to each docket entry.
- Add standardized text to indicate whether the debtor(s) appeared.
- Sort by time as well as case number.
- Allow Chapter 13 trustees to use the Trustee's 341 Filings program.

Continue Multiple 341 Meetings

On the Trustee's 341 Filings selection screen, a new "Continue multiple 341 meetings" check box is displayed. A new sort by time option gives flexibility in organizing the cases on the calendar.

The screenshot shows the 'Trustee's 341 Filings' interface. At the top left, there is a 'Date' field with a calendar icon. To its right is a checked checkbox labeled 'Continue multiple 341 meetings'. Below these is a 'Sort by' dropdown menu with 'Case Number' selected, and 'Case Number' and 'Time' as options. At the bottom are 'Next' and 'Clear' buttons. Red boxes highlight the 'Continue multiple 341 meetings' checkbox and the 'Sort by' dropdown menu.

If the trustee checks the "Continue multiple 341 meetings" box, a new screen is displayed to allow the trustee to continue some or all of the cases on the selected date to the **same date, time, and location**.

An "Additional docket text" field allows the trustee to include information in the final docket text. The user may select from the radio buttons – "appeared" or "absent" to include "Debtor appeared" or "Debtor absent" in final text.

Continue:

Date Time

Location

Additional docket text

Debtor appeared absent (No text)
Joint debtor appeared absent (No text)

<input type="checkbox"/> Case	Time	Chapter 7 Cases Location
<input type="checkbox"/> 11-10361-s7 Barbie R. Jones	09:00 AM	Albuquerque: 500 Gold Ave SW, Room 12411
<input checked="" type="checkbox"/> 11-10362-s7 Jenny Jones	09:00 AM	Albuquerque: 500 Gold Ave SW, Room 12411
<input type="checkbox"/> 11-10368-j7 Davy Jones	09:00 AM	Albuquerque: 500 Gold Ave SW, Room 12411
<input type="checkbox"/> 11-10370-j7 Tommy Thomas and Ilene Thomas	09:00 AM	Albuquerque: 500 Gold Ave SW, Room 12411

If the chapter 7 trustee runs the report without selecting the “Continue multiple 341 meetings” box, the Trustee’s 341 Filings screen is displayed. If the “Continue To” radio button is selected the screen expands to allow entry of date, time, and location.

Chapter 7 Cases						
Case Number	No Action	Report of No Distribution (NDR)			Meeting Held	Continue To
		No Funds	Dismiss / Convert No Funds	Dismiss / Convert Funds	Min Funds	
11-10361-s7 Barbie R. Jones	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
		Date	Time	Location		
		9/28/2011	10:00 AM	Albuquerque: 500 Gold Ave SW, Room		
		Additional docket text				
		<input type="text"/>				
		Debtor <input type="radio"/> appeared <input type="radio"/> absent <input checked="" type="radio"/> (No text)				

Chapter 7 Cases						
Case Number	No Action	Report of No Distribution (NDR)			Meeting Held	Continue To
		No Funds	Dismiss / Convert No Funds	Dismiss / Convert Funds	Min Funds	

The name of this column has changed from **Initial Report** to **Meeting Held**

□ If the chapter 13 trustee runs the report without selecting the “Continue multiple 341 meetings” box, the Trustee’s 341 Filings screen is displayed.

Chapter 13 Cases				
Case Number	No Action	Meeting Not Held	Meeting Held	Continue To
11-10258-13 Samuel Lee Carter	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11-10259-13 Lucille Ball	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11-10286-j13 Barky Butler	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11-10414-s13 Samuel Lee Carter	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11-10415-j13 Lucille Ball	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Submit Clear

If the “Continue To” radio button is selected the screen expands to allow entry of date, time, and location.

Chapter 13 Cases										
Case Number	No Action	Meeting Not Held	Meeting Held	Continue To						
11-10258-13 Samuel Lee Carter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>						
<table border="1"> <tr> <th>Date</th> <th>Time</th> <th>Location</th> </tr> <tr> <td>9/28/2011</td> <td>10:00 AM</td> <td>Albuquerque: 500 Gold Ave SW, Room</td> </tr> </table>					Date	Time	Location	9/28/2011	10:00 AM	Albuquerque: 500 Gold Ave SW, Room
Date	Time	Location								
9/28/2011	10:00 AM	Albuquerque: 500 Gold Ave SW, Room								
Additional docket text <input type="text"/>										
Debtor <input type="radio"/> appeared <input type="radio"/> absent <input checked="" type="radio"/> (No text)										

TRACKING FILING FEE BALANCE – ATTORNEYS/TRUSTEES

□ In previous releases, there was no way to track the balance due when a filing fee was paid in installments. Now, for pending cases, the outstanding filing fee balance is tracked in CM/ECF.

NOTE: *This is applicable only for cases that are opened after the upgrade to Release 4.1.*

□ A new “Filing Fee” selection is available from the main Query output screen. For bankruptcy cases, this option displays a screen listing the filing fee amount, details on any payments that have been made, and the outstanding balance due. An additional section displays any related adversary proceedings with deferred filing fees.

□ For adversary and miscellaneous proceedings, the “Filing Fee” query displays the case opening fee and the balance due (if the filing fee was deferred).

WAIVER OF PAYMENTS (Application for) – ATTORNEYS

Attorneys may now open cases and request waiver of filing fees – The payment box does not appear.

Attorneys no longer need to call the court to be removed from the fees due report.

The fee box screen is not displayed and the final text reads:

Docket Text: Final Text

Chapter 7 Voluntary Petition. Receipt Number: WAIVE, Fee Amount \$0.00 Filed by Patty Peppermint. (atycoll, April)

Revision Log

Date	Comments	By
9/9/11	Created changes 4.1 document	April
9/12/11	Made several edits throughout the document, including additional information where needed.	Melissa
9/13/11	Edited Trustee's 341 Filings section to include chapter 13 screen shot and info.	Isabelle