Guide to new features in CM/ECF Version 3.2 & 3.3.1 for Attorneys & Law firm staff

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Important! **The browsers supported for the application are Internet Explorer 6 or 7 and Mozilla Firefox 2. Netscape should no longer be used.**

Following the court's upgrade to CM/ECF Release 3.2, Internet Explorer (IE) users should configure Internet Explorer to check for newer versions of stored pages every time they start their browser.

1. On the Internet Explorer menu bar, click Tools and then click Internet Options. The Internet Options dialog box appears.

2. Depending on your browser version, do one of the following:

    ➢**For Internet Explorer 6**
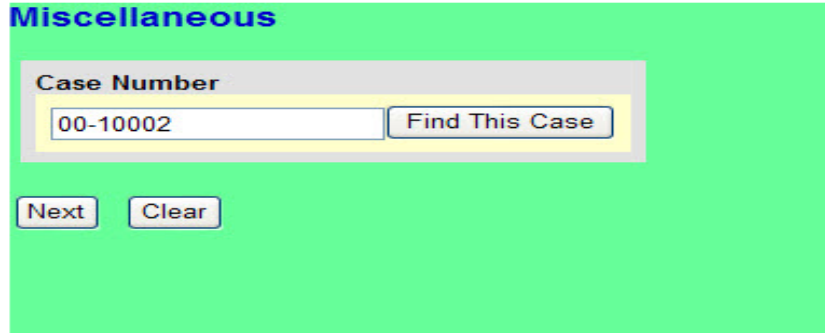
    a. Under Temporary Internet Files, click Settings. The Settings dialog box appears.

    b. Under the Check for newer version of stored pages, click to select "*Every time you start Internet Explorer.*"

    c. Click Ok.

    ➢**For Internet Explorer 7**

    a. Under Browsing history, click Settings. The Temporary Internet Files and History Settings dialog box appears.

    b. Under the Check for newer version of stored pages, click to select "*Every time I start Internet Explorer.*"

    c. Click Ok. The Internet Options dialog box appears.

3. Click Ok.

CASE NUMBER LOOK-UP

- When the case number is entered a "Find This Case" button will display as soon as you begin typing and the "Next" button becomes active.

- After clicking on "Find This Case" matches are displayed on the same screen with radio buttons. The "Hide Case List" button will allow you to control what you see. With the correct case selected, you must again click *Next*, or press Enter, to proceed.

CASE OPENING

- Prior to version 3.2, when opening a bankruptcy case, the default value for the chapter was 7. Now, the chapter has no default value and you must select the chapter from the drop-down.

- Cases will be automatically assigned to a division based on the debtor's county, even if the case is a joint filing with different counties listed.

- 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, which is accessible via a link at the end of the case opening process, now labels the filing date as "Filed" rather than "Filed Electronically."

  Note*:* The Notice of Bankruptcy Case Filing link can also be found under Query.

- **Involuntary Case Opening**

  The following fields have been deleted from involuntary case opening: Prior filing within 8 years, Asset notice, Estimated number of creditors, Estimated Assets, Estimated Liabilities.

- **Case Opening: Chapters 7, 11 and 13 individual debtors' data collection.**

  A new screen appears after the screen that collects Type of debtor/Nature of business. This screen collects data needed by the Executive Office of the US Trustees (EOUST).

  See the new screens below:

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CHAPTER 7

ECF   Bankruptcy   Adversary   Query   Reports   Utilities   Search   Logout

Open New Voluntary Bankruptcy Case

Schedules

Schedule C: Total value of claimed exemptions

Schedule I line 1: Monthly gross wages, salary, and commission   Debtor [   ] Spouse [   ]

Schedule I line 5: Subtotal of payroll deductions   Debtor [   ] Spouse [   ]

Schedule J line 20c: Monthly net income

Form B22A

Line 1A: Veteran's declaration   ☐

Line 1B: Declaration of non-consumer debts   ☐

Line 2: Marital/filing status

Line 11: Subtotal of current monthly income   Debtor [   ] Spouse [   ]

Line 14B: Debtor's household size

Line 14: Applicable median family income

Line 18: Current monthly income

Line 19A: National standards: food, clothing and other items

Line 19B: National standards: health care for household members under 65 years of age (Subtotal C1)

Line 19B: National standards: health care for household members 65 years of age or older (Subtotal C2)

Line 20A: Local standards: housing and utilities; non-mortgage expenses

Line 20B: Local standards: housing and utilities; mortgage/rent expenses

Line 22A: Local standards: transportation: vehicle operation/public transportation expense   Number of vehicles used [▾] Amount [   ]

Line 22B: Local standards: transportation: additional public transportation expense

Line 23: Local standards: transportation ownership/lease expense   Number of vehicles owned [▾]

Line 23c and 24c: Local standards: Net transportation ownership/lease expense   Vehicle 1 [   ] Vehicle 2 [   ]

Line 33: Total expenses allowed under IRS standards

Line 38: Education expenses for dependent children under 18

Line 39: Additional food and clothing expense

Line 41: Total additional expense deductions

Line 46: Total deductions for debt payment

Line 47: Total of all deductions allowed

Line 50: Monthly disposable income

Line 51: 60-month disposable income

Line 52: Initial presumption determination

Line 53: Total non-priority unsecured debt

Line 54: Threshold debt payment amount

Line 55: Secondary presumption determination

[Next] [Clear]

CHAPTER 11

| CM**ECF** | Bankruptcy | Adversary | Query | Reports | Utilities | Search | Logout |

Open New Voluntary Bankruptcy Case

Form B1: Debtor's aggregate non-contingent liquidated debts < $2,190,000 ☐

Schedules

Schedule C: Total value of claimed exemptions

Schedule I line 1: Monthly gross wages, salary, and commission Debtor [ ] Spouse [ ]

Schedule I line 5: Subtotal of payroll deductions Debtor [ ] Spouse [ ]

Schedule J line 20c: Monthly net income

Next Clear

CHAPTER 13

| CM**ECF** | Bankruptcy | Adversary | Query | Reports | Utilities | Search | Logout |

Open New Voluntary Bankruptcy Case

Schedules

Schedule C: Total value of claimed exemptions

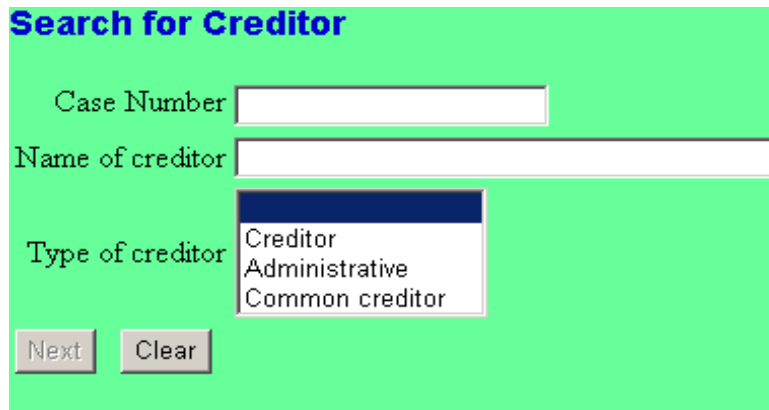Schedule I line 1: Monthly gross wages, salary, and commission Debtor [ ] Spouse [ ]

Schedule I line 5: Subtotal of payroll deductions Debtor [ ] Spouse [ ]

Schedule J line 20c: Monthly net income

Next Clear

CLAIMS/CREDITORS

- **Search for a Creditor.**

  The "Search for Creditor" screen when filing claims now includes a blank value so that all types of creditors can be retrieved and multiple creditor types can be selected. The type of creditor is displayed on the search results list.

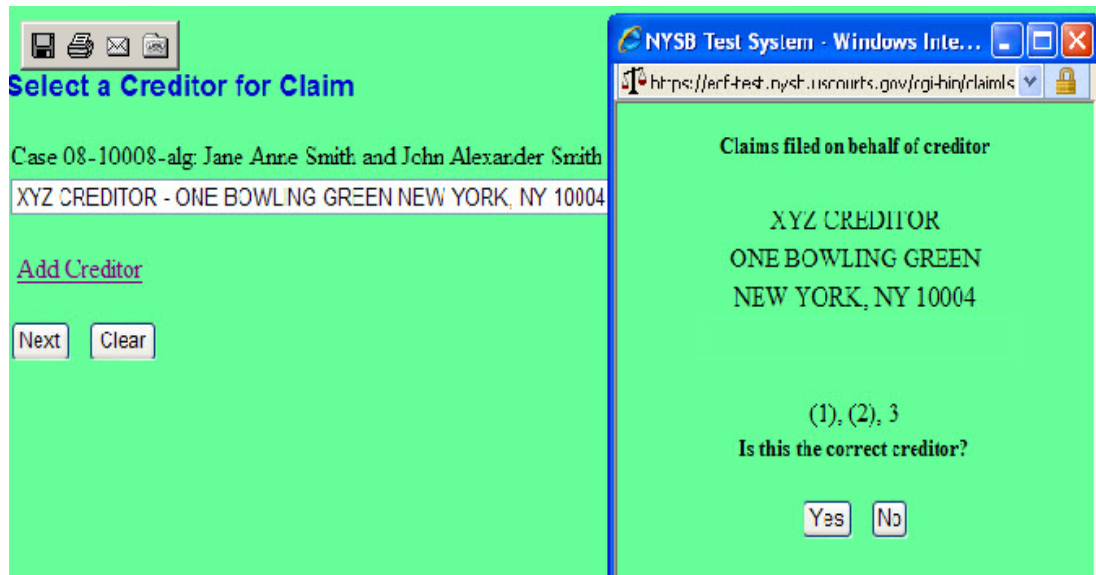 If creditors are returned from a search and you expand the pull-down list to select a creditor, a pop-up box will appear when you select a creditor. This pop-up window shows:
  - whether the creditor you selected has filed a claim or not,
  - the name, address and claim number for that creditor,
  - the number of claims filed for that creditor, and
  - if a claim is no longer owned by that creditor, the number appears in parentheses.

Holding the cursor over a creditor's name will now show the number of claims that have been filed for that creditor. If the claim has been assigned, hovering over the creditor name will display both the assignee and original claimant.

Note: Users of Internet Explorer Version 6 will not see this display.

Select a Creditor for Claim

Case 08-10008-alg: Jane Anne Smith and John Alexander Smith
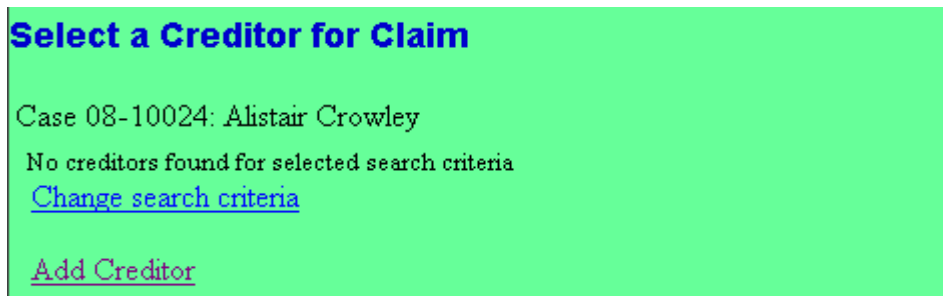
(select a creditor)
(select a creditor)
ABC Creditor Inc. - One Creditor Way New York, NY 10004 - 2223 (Creditor)

Claims filed on behalf of ABC Creditor Inc.: 4

Next   Clear

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.

Select a Creditor for Claim

Case 08-10024: Alistair Crowley

No creditors found for selected search criteria
Change search criteria

Add Creditor

- **Claim Filing – Proof of Claim: Amended Claim**

Prior to version 3.2, 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.

A **Find button** has been added to the "Amends Claim #" box. You can **click this button to display claims that have been filed in the case** in a separate window.

Note: If the original claim number is typed in the box first, only that claim is displayed.

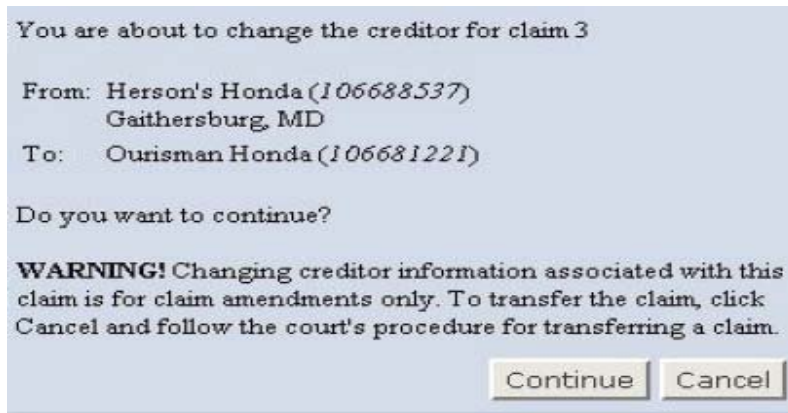| Proof Of Claim Information For		
106688537 - Herson's Honda		
Gaithersburg, MD		
Case Number: 07-10012-0	Amends Claim #: [ ] Find	Filed By: Creditor
Last Date To File:	Date Filed: 11/28/2007	
Last Date To File(Govt):		

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

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

➢When **selecting a claim** that was **filed by** the <u>same creditor</u>, the values from the original filing are copied into the Proof of Claim screen for editing.

By clicking on the Creditor Name, the claim number will be filled in the Amends Claim # box on the Claim Information screen.

➢**If you select** a **claim to be amended** that was **filed by** a <u>different creditor</u>, a confirmation/warning screen is displayed. Click Continue and the values from the original filing are copied into the Proof of Claim screen for editing.

You are about to change the creditor for claim 3

From: Herson's Honda (106688537)
Gaithersburg, MD
To: Ourisman Honda (106681221)

Do you want to continue?

WARNING! Changing creditor information associated with this claim is for claim amendments only. To transfer the claim, click Cancel and follow the court's procedure for transferring a claim.

Continue | Cancel

Note: Do Not Use this procedure to transfer a claim from one creditor to another.

➢A new option ("Clear" box) has been added to the Proof of Claim screen so that you can easily clear the values that are displayed:

§ **Creditor Maintenance: add a creditor**

Members of the creditors' committee are now designated as either an entity (business) or individual. An "Entity" check box has been added to the detail screens and is enabled if the "Yes" radio button is selected for "Creditor Committee."

Add Creditor(s)

Case number 08-10029-reg Holly Buddy

Name may be 50 characters. Address may be 5 lines, 40 characters each.
More than one creditor may be entered. Separate creditors with a blank line.

Name and Address [   ]

Creditor type [Creditor ▼]

Creditor committee ⦿ No ○ Yes   Entity ☐

[Next] [Clear]

Previously, the Notice of Electronic Claims Filing screen showed only the name and email address of recipients (and names of those not notified electronically). Now, notices of electronic filings for attorney recipients' show "on behalf of," the type and name of the party being represented, along with the attorney email address.

William R. Adams on behalf of Debtor Madeleine Martin
wradams@comcast.net

DOCKETING

- **Joint Debtor Dispositions.**

  The reference information near the top of the docketing screens now shows the disposition and dates for both debtors in joint cases (e.g. dismissed, discharged, and date).

- **Associated Cases.**

  The lead case number is now a hyperlink to that case on the associated cases warning screen, when docketing.

Note: Adding corporate parents/affiliates is not only available during case opening. You can enter corporate parents and other corporate affiliates for a party when docketing a Corporate Ownership Statement.

▪ **Adding A Party: Corporate parent/affiliate.**

➤The **Corporate parent button** on the Debtor Information screen is now labeled "**Corporate parent/affiliate**." After clicking on the Corporate parent/affiliate button, users will be prompted to search for the parent/affiliate being added. [Type the name in the "Business name" field and click the Search button.]

If there is no match for the parent/affiliate ("No person found"), users will need to click on the Create new corporate parent/affiliate button.

Users must also **select the Type**: **corporate parent** *or* **corporate affiliate** from the drop down and leave the check mark in the Entity box.

Note: Repeat this process if there is more than one corporate parent or affiliate.

➤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.**

If a fee or an expense amount has been entered, then the **"Type" of professional** from the selection list is required. Conversely, if no fee or expense is entered, then the professional type can be blank.

▪ **Docketing an event that requires a fee.**

When you are docketing an event that requires a fee, you are presented with a pop-up window relating to payment. This pop-up window contains a message warning against using the Back button and now another warning message against closing the window by clicking the X in the upper right corner.

- **Notice of Electronic Filing (NEF)**

  ➢The **language on** the **NEF regarding free looks has 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.

  ➢**For Written Opinions, the note still reflects:**

  NOTE TO PUBLIC ACCESS USERS There is no charge for viewing opinions.

  ➢When **clicking** a **document link on an NEF for which** a **free look is available**, the following notice 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."

  ➢Notices of electronic filings (NEF) now show the party being represented (includes party role, first and last name) along with the attorney email address. 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.

MISCELLANEOUS

- Pressing the **Enter** key gives you the same result as using the mouse when clicking the *Run Query*, *Run Report*, or *Submit* buttons.

- 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" displayed. Now, a default name, which varies with the browser, is generated.

- Previously, the party search results box only displayed last, first, and middle names when Adding/Creating a New Party. Now, the generation, address line, city and state are also displayed, making it easier to distinguish between similar persons.

- The label for Social Security number has been changed to "SSN/ITIN" since an individual tax identification number may be used. The label for federal tax identification number has been changed to "Tax ID/EIN" to show that it is also referred to as "employer identification number."

- Now, you can change the client code as needed when you move among District, Bankruptcy, and Appellate court CM/ECF applications.

- Document links:

  ➤It is now possible for PDF documents to include active links to documents in the original case.

  ➤If your Adobe Acrobat option to "Display PDF in browser" is NOT set, you may have problems with the display of screens when viewing a document from a link. You can change the setting, found via the "Preferences" option on the Acrobat Edit menu; select the "Internet" category.

  Note: Refer to the Viewing/Downloading Multiple documents section of this guide for more information about document links.

- Check boxes for open and closed cases have been added to the screen to narrow your search and you can query by Employer Identification Number (EIN).

- The abbreviated case data that appears at the top of the screen now includes, dismissed and discharged dates for each debtor in a joint case.

- **Case Summary**

  ➤When running a query for a bankruptcy case, Nature of debt is now displayed (e.g. consumer or business).

  ➤When querying an adversary proceeding, the lead case number is displayed as a link to the docket report.

  ➤The discharge date, dismissed date, and the disposition for the joint debtor are displayed in joint bankruptcy cases.

- ▪ **Associated Cases**
  ➢Closed cases are now marked with "(closed)" after the case title.

- ▪ **Corporate Parents**

  ➢This option is now labeled "Corporate Parents/Affiliates."

  ➢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** (Query, click Deadline/Schedule)

  ➢The hearing judge is now displayed and there is also an option to sort by hearing judge.

Deadlines/Hearings

Sort by [Hearing Judge ▼]

[▼]

[▼]

[Run Query] [Clear]

08-10028 The paper Company
Case type: bk **Chapter:** 11 **Asset:** Yes **Vol:** v
Date filed: 09/12/2008 **Date of last filing:** 09/12/2008

Deadlines/Hearings

Doc. No.	Deadline/Hearing	Event Filed	Due/Set	Satisfied	Terminated	Hearing Judge
1	Chapter 11 Plan	09/12/2008	01/10/2009			
1	Disclosure Statement Due	09/12/2008	01/10/2009			
1	Initial Case Conference	09/12/2008	10/14/2008			

REPORTS

- **Docket Report**

  ➢Currently CM/ECF shows one disposition on a case and assumes that joint debtors will have the same disposition on the same date. **With CM/ECF version 3.3, bankruptcy cases that are closed on or after March 9, 2009, will show the joint debtor's disposition, discharge date and dismissed date, in addition to the debtor's disposition**.

  ➢The dockets of bankruptcy cases and adversary proceedings docket now contain **links to associated cases**, while the adversary proceeding docket also includes a link to the Lead bankruptcy case docket.

  ➢There are **two** (2) **new options when running** a **docket report**:

  1. **View Multiple Documents.**
  2. **Create Appendix.**

  Note: The maximum file size for the combined PDF is 2 megabytes.

  i. **View Multiple Documents:**

  This option allows you **to view or download a set of selected PDF documents** as one entity. After you click *Run Report*, you are presented with a screen for selecting docket entries:

Filing Date	#	Select all / clear	Docket Text
12/12/2005	●1	☐	Chapter 7 Voluntary Petition. Fee Amount $ 274. Filed by Robbins, Catherine . (Robbins, Catherine) (Entered 07/05/2006)
09/20/2006	●2	☐	Amendment to List of Creditors. . Fee Amount $ 20. Filed by Rebecca Walters. (Schilling, L) (Entered: 09/20/2006)
10/02/2006	●		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

If *View Selected* is chosen, a PDF file with all the documents that are associated with the selected entries is displayed.

If *Download Selected* is chosen, a compressed (.zip) file that can be saved is produced and each document within the compressed file is a separate PDF.

Be advised that if your operating system is Windows 2000, you will need software (*e.g*. WinZip) in order to open compressed files.
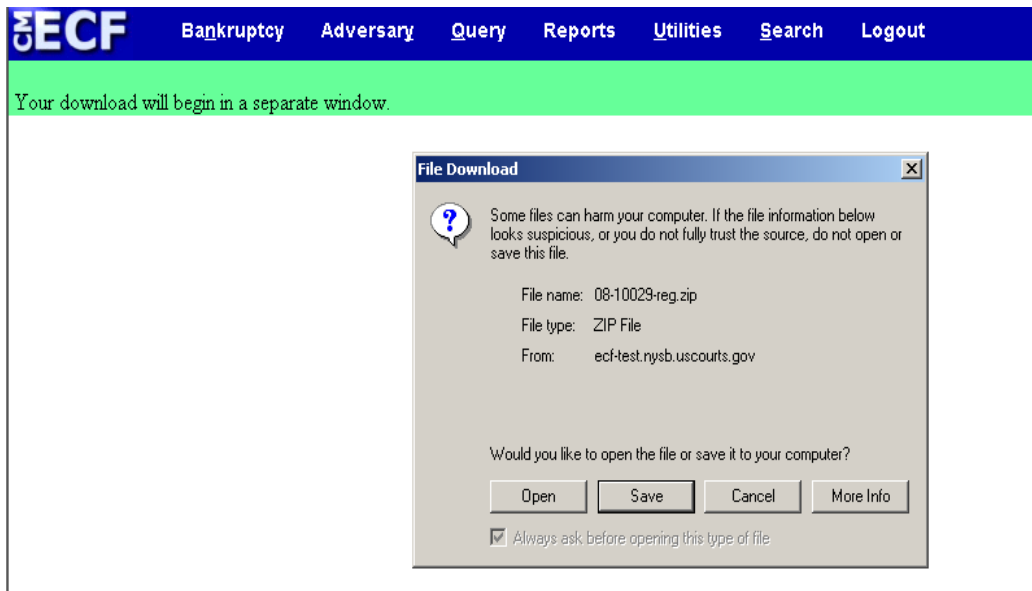
A PACER billing receipt for the selected documents is shown before the PDF files are displayed or downloaded.

If the file size to be displayed/downloaded exceeds the limit specified by the court, the display/download will not occur and file size information is shown so that you can make different selections that will be within the total file size limit.

A similar capability has been added to the Document Selection Menu. **When you click the document number link for a document that has attachments** (in a docket report, a history/document query, etc.) **you may view the main document and all attachments together by clicking the View All button**, instead of having to view and save each document separately. In addition, a "Download All" option is also presented.

Note: There is a PACER fee of 8 cents per page for all pages in all the documents selected, as well as, the file size restriction on the amount of data viewed/downloaded as described above.

ii.   **Create Appendix**

When this option is selected, other options are disabled and you can choose those documents you want to include in your appendix.

This option produces a single PDF file that includes both a complete docket sheet AND images of all the documents that you select. 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.

The "Footer format" box allows you to choose text options that would appear on each PDF page. The "Footer format" defaults to <pagenum>, which numbers the pages consecutively.

Clicking View Selected displays the Appendix file with all the documents associated with the selected entries.

You will be charged the PACER fee of 8 cents per page for all pages of the documents selected and for the number of pages of the docket generated. Therefore, if a case has a very large docket, you may not want to use this option, but rather assemble your appendix using the view multiple documents option thereby eliminating the docket from the package.

o   When selected, the **"*View multiple documents*"** and **"*Create Appendix*"** **option creates a single PDF** from multiple documents, **which may include hyperlinks within the same PDF** to other CM/ECF documents.

The links in the consolidated document are the same as those in the original documents and may point to the beginning of the document or to a specific page in the document. Therefore, **clicking a link will display the reference document in a new window**, even if the referenced document is included in the consolidated PDF **and would thereby incur an additional fee**.

To avoid additional PACER fees, you should **check the link description and look for the referenced document in the consolidated document rather than clicking the link**.

➢A "Show Associated Cases" link has been added to the docket report that displays a table of associations.

➢On the docket report for adversary proceedings the "Related BK" label was changed to "Lead BK Case."   The "Lead Bk Case" value is a link to the docket report for that case.

- **Cases Report**

➢Previously, when selecting both open and closed cases, the report would only display a count of "Total number of cases" at the end of the report. Now, the end of the report reflects the <u>number of open cases and closed cases</u> when you select both open and closed cases to be included.

| Prior to 3.3.1 | 3.3.1 |

➢Previously, when the "Party Information" box was checked the party role (*e.g.* debtor) was not shown. The party "Role" is now displayed with the party name.

➢When a joint bankruptcy case is closed, the disposition, discharge date, and dismissed date for each debtor are displayed. In addition, the format of the data record is the same for all case types (ap, bk, mp) and whether or not the *Party information* box was checked.

▪ **Claim Register Report**

➢Icons for pop-up calendars have been added for the Filed "from" and "to" dates.

➢Enhancements to the claims register report include:
  o "Claimant History" link displayed in the *Creditor* section, and
  o "Details" link in the *History* section

These links provide more details of the claim history, for instance, if a claim was transferred or if changes were made to the initial claim filing via editing.

Creditor: (106681232) H&H Collections 123 Main St. Boonton, NJ 07058 07058 Claimant History	Claim No: 2 Original Filed Date: 10/22/2007 Original Entered Date: 10/22/2007	Status: Filed by: CR Entered by: Weidenschilling, Lynn Modified:

Priority claimed: $1349.00

Total   claimed: $1349.00

History:

Details ◙ 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)

➢The silver ball icon for the Notice of Electronic Claims Filing is only accessible if you are logged in with a CM/ECF account.

Creditor: (2205) eCast Settlement 123 broadway NY, NY 10004 Claimant History	Claim No: 1 Original Filed Date: 09/09/2008 Original Entered Date: 09/09/2008	Status: Filed by: CR Entered by: Gomez, Jessica Modified: 09/09/2008

Secured claimed: $67000.00

Total   claimed: $67000.00

History:

2 09/09/2008 Transfer Agreement FRBP 3001(e) *(2)* Transfer Agreement 3001 (e) 2 Transferor: Lillypad Condominiums (Claim No. 1) To eCast Settlement. To eCast Settlement123 broadwayNY, NY 10004. filed by eCast Settlement.(Gomez, Jessica)

Details ◙ 1-1 09/09/2008 Claim #1 filed by Lillypad Condominiums, total amount claimed: $67000 (Gomez, Jessica)

➢An error message no longer displays when the name of the creditor who transferred a claim has been modified.

- **Judgment Index Report (New) pursuant to Bankruptcy Rule 5003(c).**

  ➢This report lists docketed events that the court has designated to be "judgments."

Judgment Index Report		
U.S. Bankruptcy Court - - Southern District of New York		
Report Period: 08/03/2005 - 10/06/2008		
Case Number/Title	Judgment Description	Judgment Date
05-10050-cb Sin Dinero, Inc.	Motion, Summary Judgment *Document:* 6	08/25/2005
05-10101-jmp Jake Smith	Judgment *Document:* 6	12/28/2005

  Note: The Case Number/Title link takes you to the docket report.

- **Calendar Events Report**

  ➢Previously, the judge selection applied only to the judge assigned to the matter (hearing judge). Now, the "Judge" label on the screen includes an "Unassigned hearing judge" option in the judge selection list and you can select whether the hearing judge, case judge, or both should be considered by selecting one of the corresponding radio buttons.

➢The last case number requested in the current CM/ECF session is now filled in by default in the case number field.

➢The "Calendar events" label on the screen has been changed to "Type."

➢A blank option for the "Office" selection item has been added as the default.

■ **Docket Activity Report**

Case	Doc Id	Date Entered/Filed	Category/ Event	Judge/ Trustee	Notes
08-10021 Carolyn Schmidt *Office:* 1 *Type:* bk *Chapter:* 7 *Assets:* No	1	*Entered:* 09/08/2008 14:08:19 *Filed:* 09/08/2008	*Category:* misc *Event:* Voluntary Petition (Chapter 7)		*Subm. by:* A. Acosta *Group:* aty

➢Check boxes for Open cases and Closed cases were added to the selection screen.

➢The selection for "Only cases to which I am linked" (shown above) will only appear when you are logged in with a CM/ECF filing password, not a PACER password.

➢The Case column now contains a value of yes or no for "Assets."

➢The Category/Event column of the report now displays the *Event* name when the full docket text option radio button is selected, in addition to the summary text option.

NEW SEARCH OPTION

This new feature located at the top of the menu bar allows you to **search Menus and Filing Events** by **using key words**.

Note: You can still access menu items by simply clicking on the menu title.

▪ **Menus and Filing Events**

Click Search on the main blue menu bar. A small pop-up window appears for entering the text to be searched and it is not case sensitive.

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.

The results will show all entries with those words as hyperlinks and which Menus they are located under so you can go directly to it.
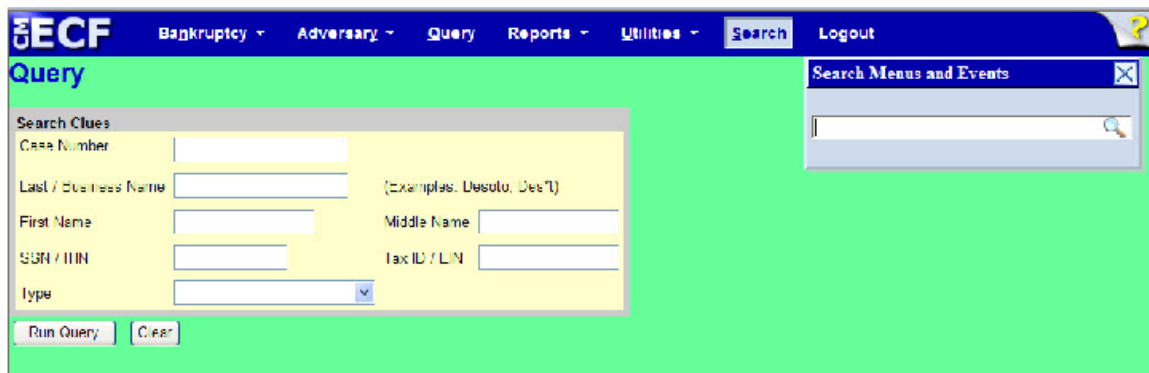
▪ **Docket Event Search**

Docketing events are now searchable by using the search feature within a particular Menu while filing, making it easier to find the proper ECF event to docket a pleading. For example, if you are filing a motion and you must choose from a long list of events it is no longer necessary to scroll through the list to find the desired event. A text box is provided above the list:

By entering some word fragments from the event description (*e.g.*, sanction), a full list will be displayed of those events that match:

Clicking on an event from the *Available Events* moves the event over to the *Selected Events* box on the right.

You may also **select multiple events** by holding the Ctrl key and clicking each event. The events you have chosen will display on the right in the "Selected Events" box.

If you want to remove any event that has already been selected, simply click on the event in the right side column.

Note: Only letters and numbers are searched; other characters (e.g. -, /, "-") are ignored.

➢When a docket event allows you to enter multiple case numbers (e.g. Batch Filings and Multi-Case Docketing) and you paste in a case list (with Ctrl-V), the individual case numbers are now automatically entered into separate boxes.

TRANSCRIPTS

Implementation of Judicial Conference Policy. Please refer to our separate documentation regarding transcripts at: http://www.nysb.uscourts.gov/pdf/TranscriptRestrictionsRedactionGuidelines.pdf**.**

UTILITIES

- **View Your Transaction Log**

  Changes to the style of column headers and font were made in an effort to standardize the format of ECF reports.

- **Review Billing History**

  When you click the link "Review Billing History" you are automatically redirected to the PACER Service Center server, which produces the report. In this new window, you can search for transactions in the current and previous months, for a specific court or all courts. The data is retrieved from the PACER Service Center's central billing transaction database and formatted according to the options you select.

http://pacer.psc.uscourts.gov or call PACER Service Center at (800) 676-6856.

▪ **Court Information**

➢This link provides users with general information, such as the maximum size of PDF files (5MB). In addition, "Maximum Merge Document Size" details have been added to this section.

➢By clicking the CM/ECF logo on the upper left hand corner of the blue menu bar, a summary of court information is displayed and a link [Further court information] that provides full court information is included.
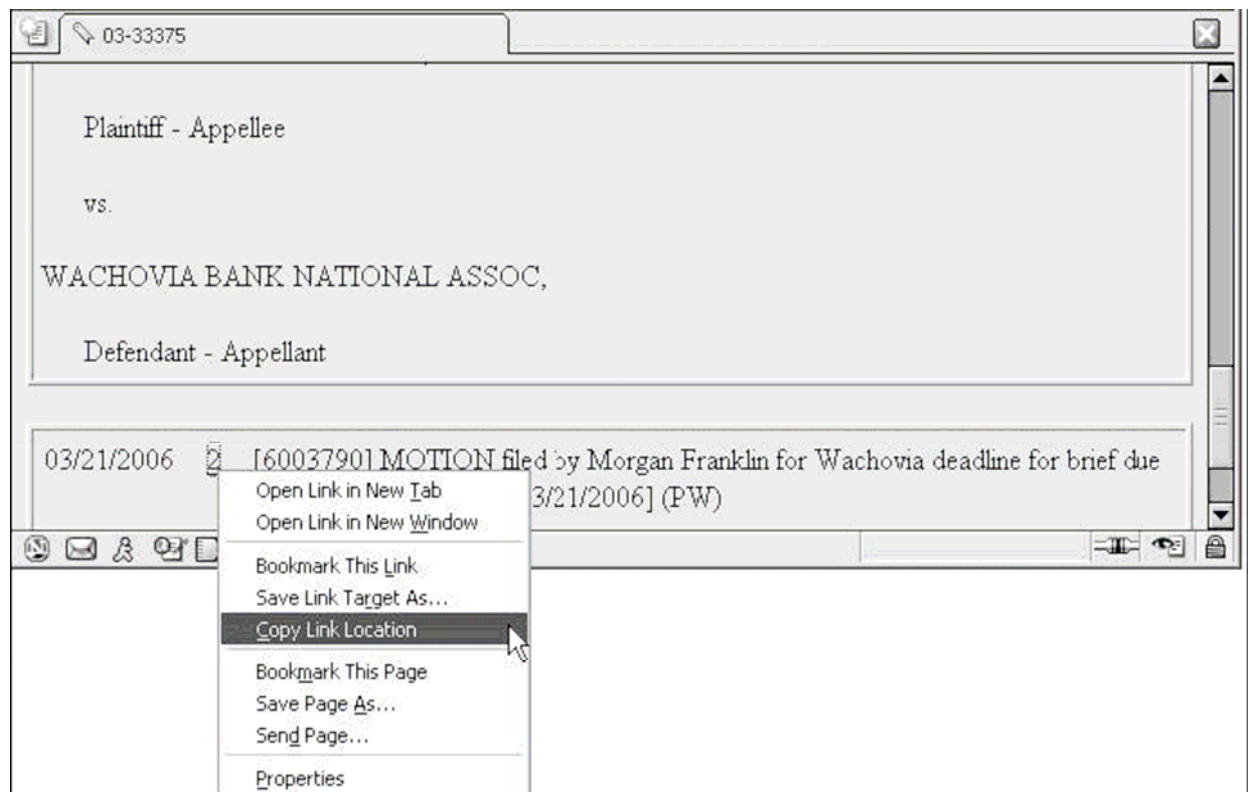
CROSS-DOCUMENT HYPERLINKS

These instructions describe the steps for creating a hyperlink in a PDF document which points to another document in the CM/ECF database. The document being referenced can be one that was previously filed, or one that is being filed in the same event with the referencing document. The steps to create a hyperlink and to generate documents in PDF format are similar whether you are using WordPerfect or Word to create documents; differences are noted.

➢**Creating a hyperlink to a document already filed in the electronic case file**

A link can be made to another document in any database in the Federal Courts -- District, Bankruptcy or Appellate.

1. Access CM/ECF and run the docket report for the case in which the document was filed.
2. Locate the document among the docket entries.
3. Copy the URL of the document to the clipboard. **DO NOT** copy the URL from the browser's address bar when the document is open. Instead, hover over the document link and click the right mouse button (the document link displays after the docket date and is represented by an icon or a number with an underscore, e.g., 2). Select **Copy Shortcut** or **Copy Link Location** from the selection list (the option you see depends on your browser).

4. Open the word processing document. In the document, highlight the citation text for which you wish to create the hyperlink.
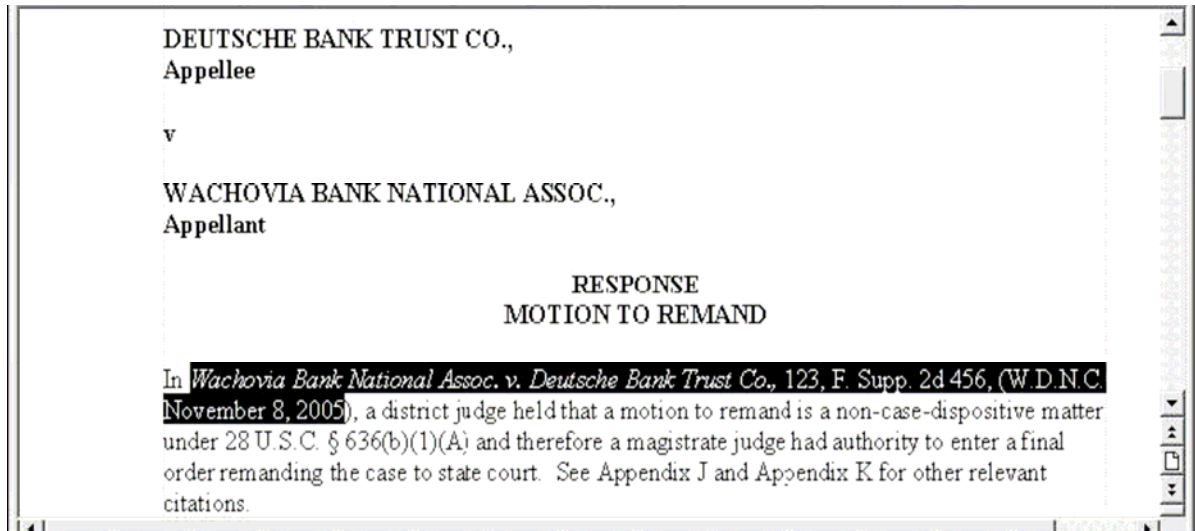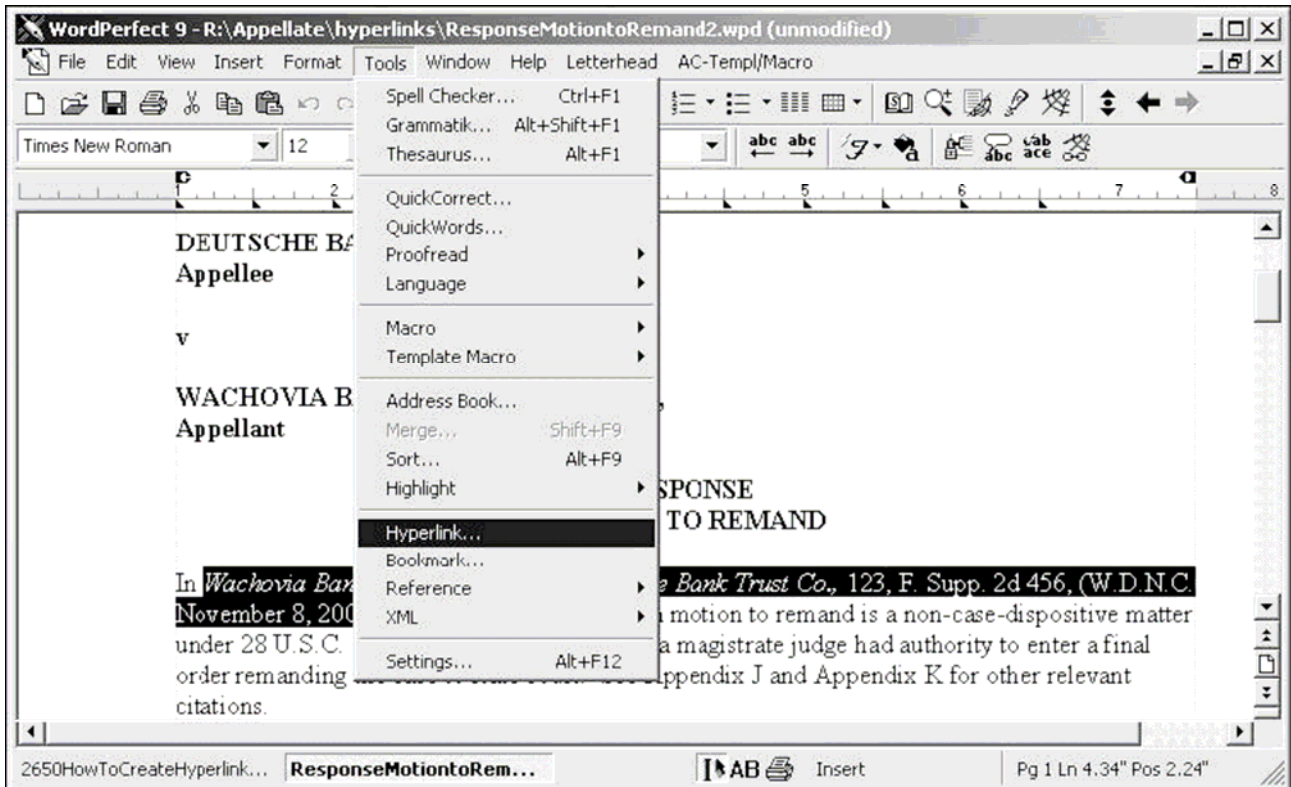

5. Create the hyperlink.

   Note: The procedure is different depending on the word processing software that you use – specific instructions for WordPerfect and Word are given on the next two pages.

If you are using WordPerfect

Select **Hyperlink** from the **Tools** menu:

The **Hyperlink Properties** window opens:
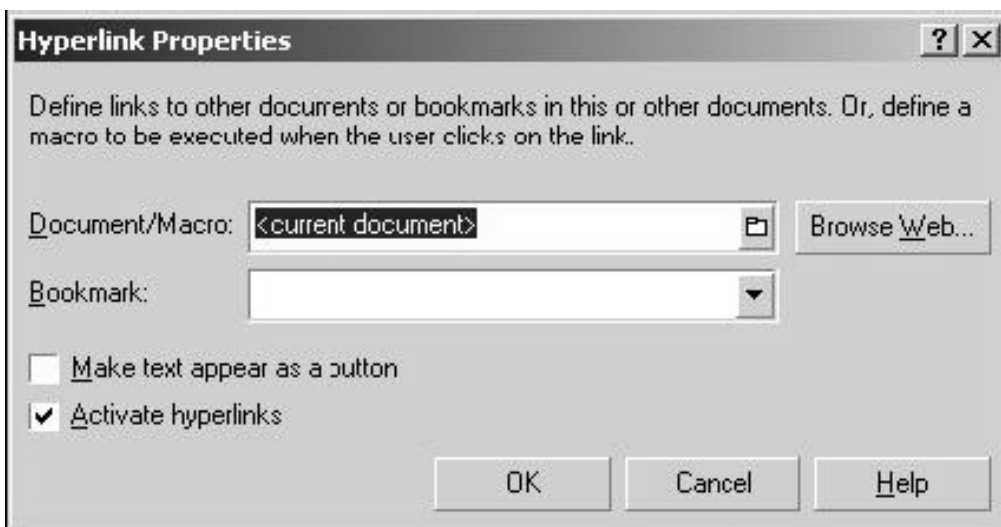
Paste the URL into the **Document/Macro** box with Ctrl-V.

If you are using Microsoft Word

Select **Hyperlink** from the **Insert** menu:

The **Insert Hyperlink** window opens:

Paste the URL into the **Address** box with Ctrl-V.

6. If the citation is to a specific page in the document, append to the URL "?page=", followed by the page number, e.g.,
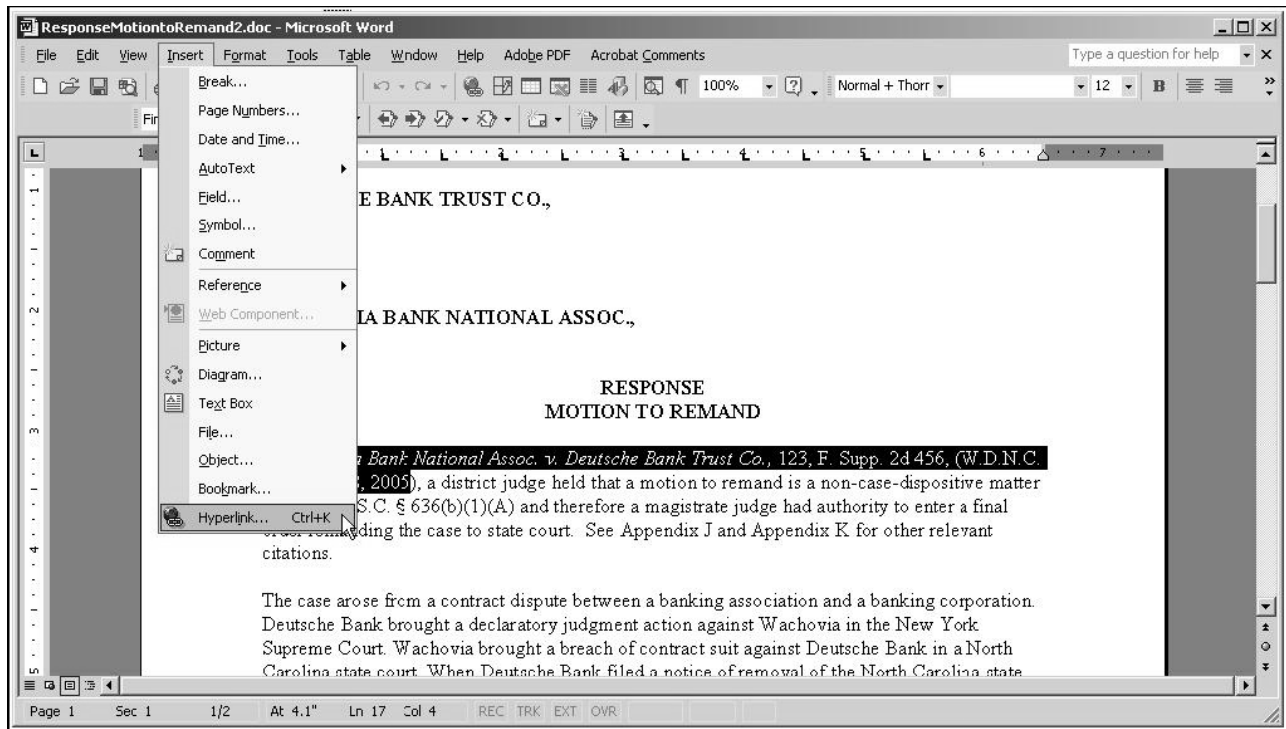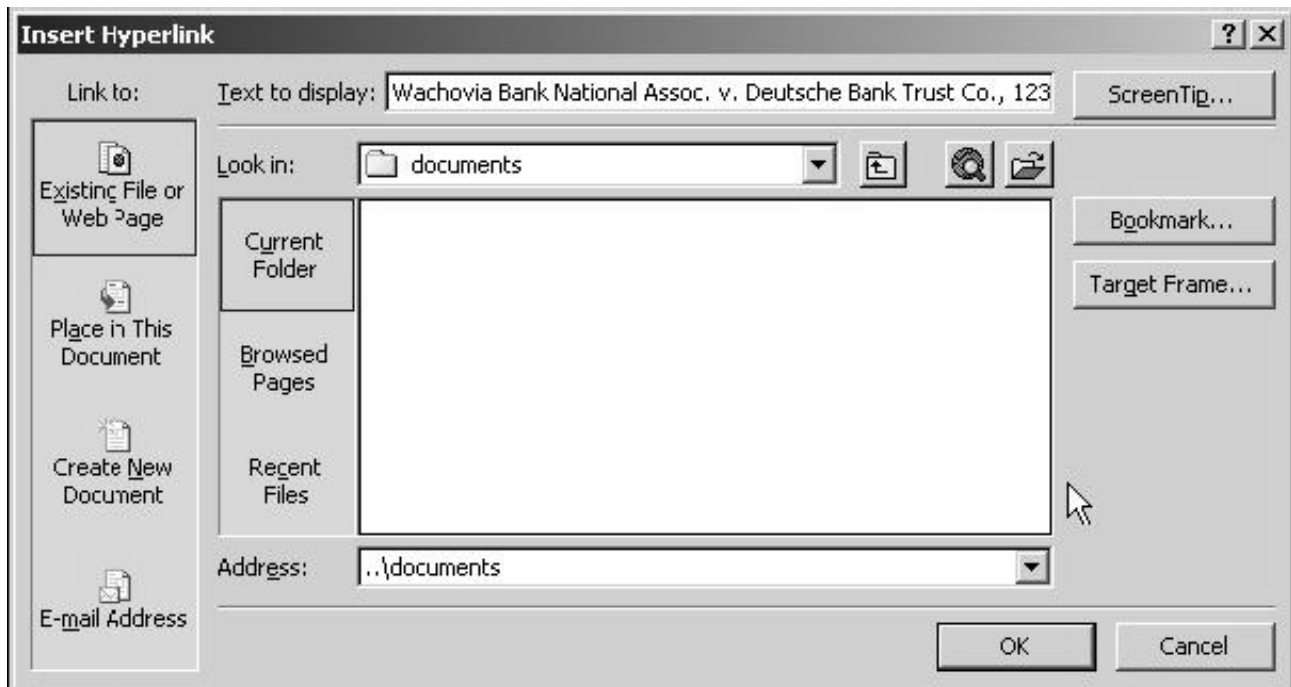
   https://ecf.txwb.uscourts.gov/docs1/001010708409**?page=23**

    Note: Because of an incompatibility between the browser and Adobe Acrobat, the page number pointer will not work if the user opens the document with Internet Explorer.

7. Click the *OK* button to close the hyperlink dialog box.

8. The hyperlink text is now underlined and blue (or whatever color is specified for links), indicating a hyperlink has been created. Save the word processing document.

9. Produce the PDF file.

    You must NOT use the "Print" option in the word processing program, since the hyperlinks will not be preserved [you may use this option if there are no hyperlinks in the document].

    Instead, use one of these methods:

    a. If you are using a version of WordPerfect that has a "Publish to PDF" or "Publish to…" option on the File menu, select it (if it is "Publish to..", select "PDF" from the choices). If you are using an earlier version of WordPerfect that does NOT have one of these options, you must upgrade to Version 11 or higher.

    b. If you are using a version of Word that has an "Adobe PDF" menu, select the "Convert to Adobe PDF" option from it.

    c. If you are using Word but do not have an "Adobe PDF" menu, close the Word file. Open the Adobe Acrobat application. From the **File** menu, select **Create PDF** and **From File...**:
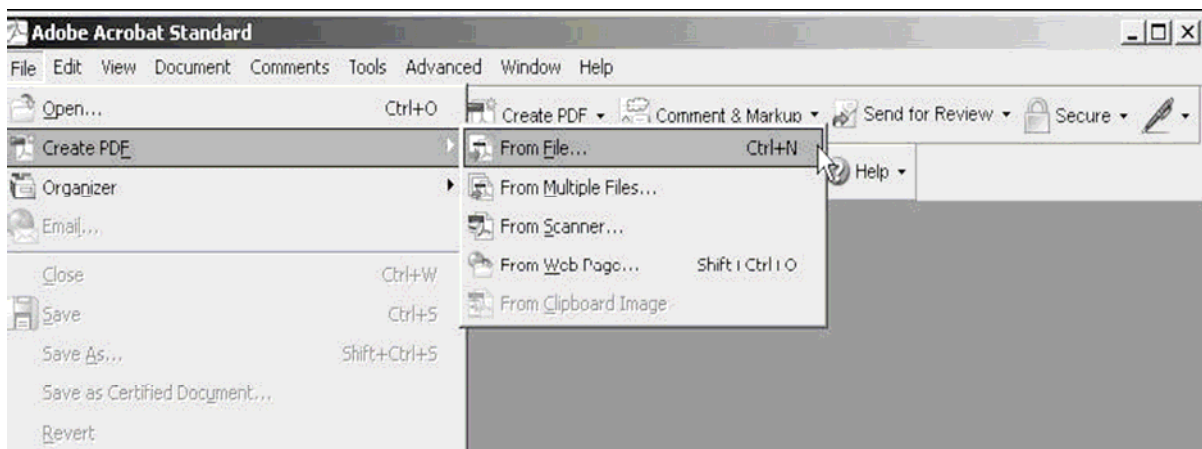
    A navigation window opens; use it to find and select the document, then click *Open*.

A series of windows open as the document is converted. When the conversion is complete, the document is displayed in an Adobe Acrobat window, with an active hyperlink.

Close the Acrobat file. Respond "Yes'" to the "Save changes" prompt and store the PDF file in an appropriate directory.

10. Docket an event and upload the PDF file to the docket entry as usual.

➤**Creating hyperlinks between documents filed in the same event**

Instead of linking to a previously filed document, you can link a document to one that will be filed in the same event (e.g., create a hyperlink in the main document to an attachment). The procedure is different, since the referenced document does not yet have an address in CM/ECF.

When you create a link, it points to the referenced document where it exists on your local PC or server; when the documents are filed in CM/ECF, the link is converted to a CM/ECF URL.

1. Create PDF versions of any secondary documents (e.g., attachments), which will be referenced by the main document. See step 9 in the previous section.

2. Open the main document in the word processing program (i.e., the document that will have hyperlinks to the secondary documents).

3. Select the text in the main document that will be displayed as the hyperlink.

4. Create the hyperlink:

If you are using WordPerfect

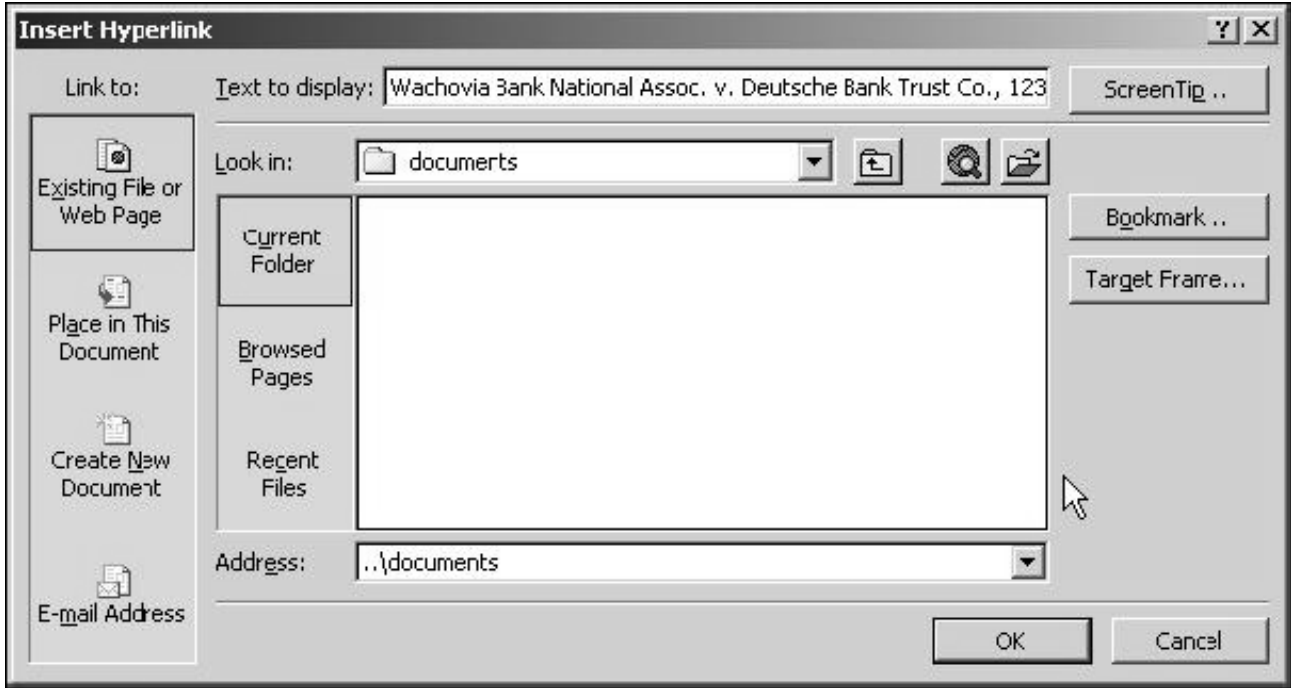Select **Hyperlink** from the **Tools** menu.

Click the folder icon to the right of the **Document/Macro** box:
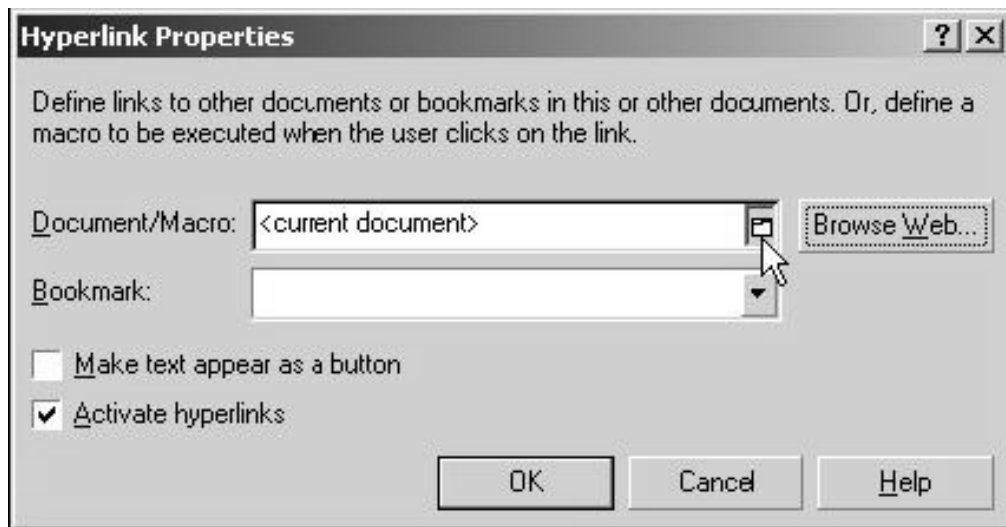
Navigate to the referenced PDF document and click *Select*; click *OK* in the Hyperlink Properties box.

If you are using Microsoft Word

Select **Hyperlink** from the **Insert** menu. Navigate to the referenced PDF document, select it, and click *OK:*

5.   If the citation is to a specific page in the document, append to the URL "?page=", followed by the page number, e.g.,

https://ecf.txwb.uscourts.gov/docs1/001010708409?page=23

Note: Because of an incompatibility between the browser and Adobe Acrobat, the page number pointer will not work if the user opens the document with Internet Explorer.

6.   Click the *OK* button to close the hyperlink dialog box.

7.   The hyperlink text is now underlined and blue (or whatever color is specified for links), indicating a hyperlink has been created. Save the word processing document.

8.   Follow the instructions in step 9 of the previous section to produce the PDF version of the "main" document.

9.   Docket an event and upload the main document and attachments as usual.