# PACER Links in CM/ECF

Two new menu selections appear under the *Utilities* menu to allow one to navigate quickly between CM/ECF and PACER. You won't have to leave your CM/ECF session to access another court in PACER or to use the PACER Case Locator.

SECF	Ba <u>n</u> kruptcy <del>▼</del>	Adversary -	<u>Q</u> uery	Reports -	<u>U</u> tilities ▼	<u>S</u> earch	Logout
Utilities					Release 5.0 Menu Items		
Your Account Internet Payment Internet Payment Maintain Your E Maintain Your L View Your Tran Your PACER A	History CF Account ogin/Password saction Log	Legal Research Legal Research Systems Tasks System Administrator		E-Orders Judgment Book Order Query	recease 3.0 weilt items		
Miscellaneous Check PDF Doc Court Informatic Edit Data File a Transcript Links to Other C Mannes Pacer Case Loca Verify a Docume	o <u>n</u> ourts tor (National Index)						

When the **PACER Case Locator** link is clicked, the Case Search Sign In page displays.

		Manage My P	CER Account   Manage My Appe	ellate Filer Account   Case Search Sign In
	<b>R</b> To Court Electronic R	ECORDS		
HOME REGISTER	FIND A CASE E-FILE	QUICK LINKS HELP	CONTACT US	a RSS
	CASE SEARCH SIGN	I IN		
	to accept cookies and you a	accept cookies in order to login to are experiencing problems with the le open your browser before trying ag	ogin, delete the stored cookie	
	_	R Login:		
	_	nt Code:	•	
	Nee	Login Cancel		
	only. Unauthorized ent	stricted government web si rry is prohibited and subject II activities and access attemp	to prosecution under Title	

# PACER Links in CM/ECF

The following updates have been made to the PACER Case Locator, provided by the PACER Service Center:

- Attorney information is now extracted for bankruptcy and adversary cases
- Alias records are now returned by a search based on SSN/ITIN or Tax ID/EIN
- Debtor and Joint Debtor Disposition values are extracted on all cases for which a disposition exists.

The <u>Link to Other Courts</u> displays the Individual Court PACER links without leaving CM/ECF.

		Manage My PACER Account   Manage M	ly Appellate Filer Account   Case Search Sign In
	O COURT ELECTRONIC RECORDS		COURTS
HOME REGISTER	FIND A CASE E-FILE QUICK LIN	IKS HELP CONTACT US	🔊 RSS 🔓 Login
FIND A CASE	INDIVIDUAL COURT PACER	R SITES	
PACER Case Locator Court Links Search Map Automated Telephone Access		the court may not provide case information to	Case Files (CM/ECF) site. If the site you would like PACER. Visit the respective <u>court's homepage</u> for
	U.S. Supreme Court	U.S. District Courts	U.S. Bankruptcy Courts
CM/ECF Version Number RSS Feed	U.S. Supreme Court National Locator	Alabama Middle - ECF 🖺 🗟 🛈 Alabama Northern - ECF 🖺 🛈 Alabama Southern - ECF 🖺 🗟 🗊	Alabama Middle - ECF 🔊 🗟 😚 Alabama Northern - ECF 🔊 🗟 😚 Alabama Southern - ECF 🔊 🗟 😚
	Pacer Case Locator	Alaska - ECF D 0	Alaska - ECF 🚨 🗟 🕕
	U.S. Courts of Appeals First Circuit - ECF S () First Circuit - BAP - ECF First Circuit - BAP	Arizona - ECF 🕻 🛈 Arkansas Eastern - ECF 🕻 😚 Arkansas Western - ECF 🕻 🖏 😚	Arizona - ECF 🔊 🕡 Arkansas Eastern - ECF 🗟 🕅 Arkansas Western - ECF 🗟 🕤
	Second Circuit (Cases filed prior to 01/01/2010) Second Circuit - ECF <b>0</b>	California Central - ECF 🔊 🗟 🛈 California Eastern - ECF ဳ 🛈 California Northern - ECF ဳ 🛈 California Southern - ECF ဳ 🗇	California Central - L.A. California Central - ECF 🔊 🔊 🛈 California Eastern - ECF 🔊 🔊 🛈 California Northern - ECF 🔊 🕥 🗘 California Southern - ECF 🔊 🗇
	Fourth Circuit - ECF 🗟 🚯	Colorado - ECF े 0	Colorado - ECF

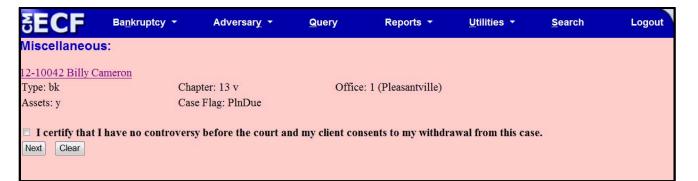
#### Withdraw as Attorney

Attorneys can terminate themselves in limited circumstances. This feature is court configurable, and some courts will choose to use this feature while others will not.

As an attorney, if you can certify that you have no controversy before the court and your client consents to withdrawal from the case, then you can withdraw from the case by docketing a new event, Withdraw as Attorney. This will result in you being terminated from the case and no longer receiving any notices of electronic filing for that case. (However, you may continue to receive notices of electronic filing on the same day your association as an attorney to the case is terminated.)

You will be removed from the mailing list and no longer receive any notices regarding this case. Attorneys can only terminate themselves and not the parties they represent. Parties will remain active.

The following is the declaration certifying that you have no controversy before the court and your client consents to your withdrawal from the case:

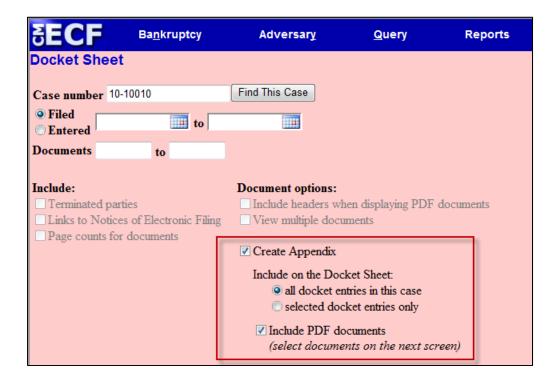


Attorneys for the debtor or joint debtor in a case will not be able to terminate themselves. In addition, attorneys for plaintiffs and defendants who are also debtors in the lead bankruptcy case will not be able to terminate themselves from an adversary proceeding.

Filing agents will be able to docket this event, just as if they were the attorney, withdrawing that attorney from the case.

# **Docket Report Enhancements**

The Create Appendix option has been modified so you have more flexibility in customizing a docket report. Now you can select only the entries you want and whether you want the PDF document appended to this customized report. Or, if you just want an abbreviated docket report without attached PDF documents, you can select only the entries you need for the task at hand.



#### Page Counts on Docket Report

The number of pages for documents associated with a docket entry is a new option.

SECF	Ba <u>n</u> kruptcy	Adversary	<u>Q</u> uery	Reports
Docket Shee	t			
Case number 10	)-10010	Find This Case		
<ul> <li>● Filed</li> <li>○ Entered</li> </ul>	to			
Documents	to			
Include: Terminated pa Links to Notic Page counts for	<u>es of Electroni</u> c Filing	Document options: <ul> <li>Include headers with</li> <li>View multiple docution</li> <li>Create Appendix</li> </ul>	hen displaying PDF iments	documents
			ntries in this case cket entries only	

Knowing how big a file is helps PACER users predict the cost of viewing an attachment and also to anticipate the loading time of a document.

Filing Date	#	Docket Text
03/01/2010	<u>1</u> (4 pgs; 2 docs)	Chapter 13 Voluntary Petition . Receipt Number cc, Fee Amount \$274 Filed by Jerry J. Heberline , Susan W. Heberline Employee Income Record Due:3/15/2010. Statement of Financial Affairs due 3/15/2010. Incomplete Filings due by 3/15/2010. (JPW) (Entered: 03/01/2010)
03/03/2010	<u>2</u> (1 pg)	Motion to Avoid Lien with First Westside Bank Filed by Jeanne L. Walker on behalf of Debtor Jerry J. Heberline , Joint Debtor Susan W. Heberline (JPW) (Entered: 03/03/2010)
03/03/2010	<u>3</u> (1 pg)	Order Granting Motion To Avoid Lien (Related Doc # 2) Signed on 3/3/2010. (JPW) (Entered: 03/03/2010)
03/03/2010	<u>4</u> (1 pg)	Motion to Avoid Lien on Household Goods under Section 522(f)(1)(B)(i) Filed by Jeanne L. Walker on behalf of Debtor Jerry J. Heberline , Joint Debtor Susan W. Heberline (JPW) (Entered: 03/03/2010)

#### **Critical Deadlines and Dates on the Docket Report**

Additional dates and deadlines now display on the caption of the docket report. A link to the Claims Register appears whenever a case has claims filed.

SECF	Ba <u>n</u> kruptcy <del>-</del>	Adversary 👻	Query	Reports 👻	<u>U</u> tilities -	<u>S</u> earch	Logout		?
Assigned to: Cha Chapter 13 Voluntary Asset Show Associated Claims Register J. Robert Hunni 1824 North Park San Antonio, TX BEXAR-TX SSN / ITIN: xxx- Joint Debtor Marie C. Hunni 1824 North Park San Antonio, TX BEXAR-TX SSN / ITIN: xxx-	Cases ngton Avenue 78223 xx-2435 ngton Avenue 78223			U.S. Bankrup SDSD (Pleas Bankruptcy Petitic	antville)	Deadline for	Date filed: Plan confirmed: 341 meeting: filing claims: filing claims (govt.): y <b>Charles G. Arringto</b> Huffman, Arrington, J 1267 Central Avenue #100 San Antonio, TX 782 210-555-4444 y <b>Charles G. Arringto</b> (See above for addre	03/12/2012 06/11/2012 08/06/2012	

The following dates will be shown, if appropriate, by chapter:

Plan confirmed date 341 meeting date Deadline for filing claims Deadline for filing government claims Deadline for objecting to discharge Deadline for financial management (Chapter 7 only)

The most recent deadline will display whether or not it is terminated.

# **Docket Activity Report**

The Docket Activity Report has been enhanced to include time filters. The report can be run in time increments, rather than running the report for the entire day. A new clock icon offers an alternative to typing in the time.

SECF	Ba <u>n</u> kruptcy <del>-</del>	Adversary -	<u>Q</u> uery	Reports 👻	Utilities -	<u>S</u> earch	Logout
Docket Activit	ty Report						
	Warning: you will	be billed for the	otal number of	pages (this repo	rt is not subject	to the 30-page l	imit on PACER charges).
Case number	F	Only cases to which	I am linked				
Office Green V Pleasar	Valley	e <b>type</b> ap bk ▼					
Category answer appeal auditor	Close		ummary Text ull Docket Text				
Entered 5/18/20	12	0 5/21/2012		TO TO			
Sort by Case N	umber 💌	-					
Run Report Cle	ear Make these option:	my default					

#### **Calendars and 341 Meeting**

You can now view All Hearings without the 341Meeting settings included. A 341Meeting selection has been added to the hearing type list.

SECI	Ba <u>n</u> kruptcy	•	Adversary	×2 à	Query	Reports	<b>.</b>	<u>U</u> tilities ▼	<u>S</u> earch	Logout	?
Calendar E	vents										
Case number											
Office	Pleasantville (1) Green Valley (4)	Ī									
Type	All Hearings 341 Meeting Confirmation Hearin	g +	Set		to		<ul> <li>AM onl</li> <li>PM onl</li> </ul>	-			
			Time	0			e Both				
Sort by	Time 🔹		Initial display o Expanded Collapsed	f related pi	roceedings:						
Display of Run Report	nly proceedings dire	ctly re	lated to the cale	ndar event							

The daily and monthly calendars and the deadlines and hearings report also have this new 341 Meeting option.

#### **Query**

New query options have been added:

- Filed Date range,
- Last Entry Date range
- Nature of Suit.

SECF	Ba <u>n</u> kruptcy	<b>.</b> 0	Adversary	•	Query R	Reports 👻	<u>U</u> tilities ▼	<u>S</u> earch	Logout
Query									
Warning: yo	ou will be i	billed for	r the total	number	r of pages (this charges).	report is not	subject to the :	30-page limit	on PACER
Search Clues									
Case Number	1								
Last / Business Name	•				(Examples: De	soto, Des*t)			
First Name					Middle Name				
SSN / ITIN					Tax ID / EIN				
Туре			÷		Open case	es 🔲 Closed case	s		
Filed Date		to	»						
Last Entry Date		to	)	11148					
Nature of Suit (AP and MP cases only)	02 (Other (e 11 (Recover	e.g. other ac ry of money	moved claim o ctions that wou //property - 54 //property - 54	uld have bee 42 turnover o		ourt if unrelated to	bankruptcy)) 💼		
Run Query Clear	r								

The Filed Date and Last Entry Date range is limited to 31 days. If a date range entered exceeds the 31 day limit CM/ECF displays an error message.

If multiple Nature of Suits are selected for a query, CM/ECF displays a message that the search could produce many records and lead to a large billing charge.



# **Multiple Social Security and Identification Numbers**

CM/ECF now allows up to five social security numbers and tax identifications numbers for each debtor and joint debtor.

After a social security number is entered a plus icon appears beside the SSN/TaxID/EIN field. If the debtor or joint debtor has another SSN/TaxID/EIN, click the "plus" icon for another field to be displayed for additional number(s). CM/ECF will now format the numbers if you don't insert hyphens.

SECF	Ba <u>n</u> kruptcy	<b>→</b> Ad	lversary <del>-</del>	<u>Q</u> uery	Rep	oorts 👻	<u>U</u> tilities <del>▼</del>	<u>S</u> earch	Logout
Debtor I	nformation								
Last name	Adams			1	First name	Donna			
Middle				C	Jeneration		Title		
name			-						
SSN/ITIN	589-56-8956	999-99-9999		Т	ax Id/EIN		12-123456	7	
Office					Address 1				
Address 2					Address 3				
City					State		Zip		
County				•	Country				
Phone					Fax				
E-mail									
Party text									
Alias	Corporate parent /	affiliate				arents or affiliates			
			b	etore clicking t	the Submit butto	n.			
Submit Ca	Incel Clear								

All SSN and TaxID/EIN numbers have been included in all reports and functions throughout the application:

• On public notices and docket sheets only the last four digits of any social security or identification numbers are displayed.

# **Multiple Social Security and Identification Numbers**

The docket sheet below is an example of how the multiple social security numbers are shown on a public notice.

SECF	Ba <u>n</u> kruptcy <del>▼</del>	Adversary 👻	<u>Q</u> uery I	Reports 👻	<u>U</u> tilities ▼	<u>S</u> earch	Logout	3
Assigned to: Chapter 13 Voluntary Asset <b>Debtor</b> <b>Donna Adams</b> 120 Sunny Lane San Antonio, TX <sup>7</sup> BAILEY-TX	xx-8956, xxx-xx-568 ustee et	9, xxx-xx-8956, xxx-	U.S. Bankruj SDSD (Plea Bankruptcy Petiti	santville) ion #: 12-1005	Date fi represented by <b>D</b> a 12 Sa	0 Legal Way in Antonio, TX		PinDue -
Filing Date	#			Dock	cet Text			
	1	Chapter 13 Voluntar	y Petition . Receipt N	lumber cc, Fee A	Amount \$281 File	d by Donna Ad	ams (Tracy, Dayne	e)

### **Notice of Electronic Filing**

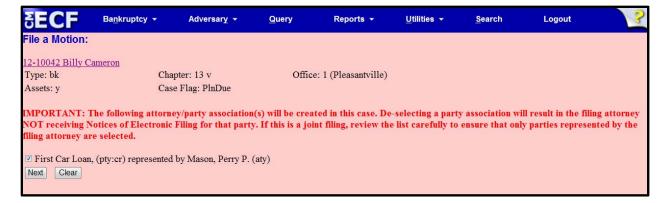
In prior releases, when an attorney represented more than one party in a case, the attorney's email and party information were listed on the Notice of Electronic Filing (NEF) only for the first party. Now the attorney is listed for each party they represent.

Although an attorney may be listed multiple times on an NEF, the system will not send multiple emails.



# **Attorney and Party Association**

When an attorney or trustee files a pleading, they are prompted to indicate whether they should be linked to the party they represent. In prior releases, the checkbox for the association with the attorney and party was unchecked and if the filer did not check the box, the association was not made. The checkbox for the association with the attorney and party is checked by default. The message has been updated to reflect the implications of omitting this necessary association.



If the box is unchecked, the attorney will not get added to the case for noticing or shown in queries and not appear on or receive the Notice of Electronic Filing.

# **Cases Report**

Split, transferred and reopened dates have been added to the selection screen.

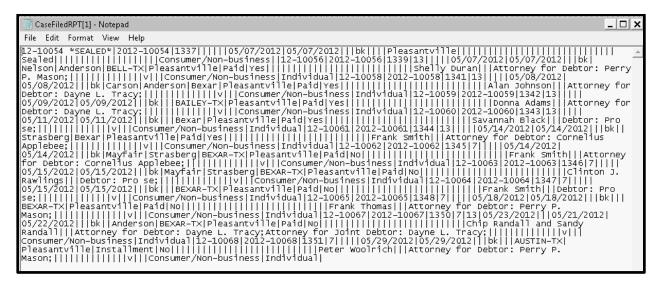
SECF	Ba <u>n</u> kruptcy ▼	Adversary 🔹	<u>Q</u> uery	Reports +	<u>U</u> tilities ▼	<u>S</u> earch	Logout	
	Warning: you w	ill be billed for th	e total numbe	er of pages (this re	port is not subj	ect to the 30-pa	ige limit on PACE	R charges).
Office Pleasantvi Green Val	ley	▼ Case Type		7 🚍 9 🔻				
Trustee Carson, S Chapter 1								
Attorn	ey							
Last name								
First name								
Bar ID								
Date Type Filed d	ate <b>From</b> 6/19/	/2012 to 6/19	/2012					
Open cas	ate		y information					
Closed C Discha	rged date		se cases only					
Voluntar Closed	date Small Busin	ess Cases						
Type of De Convert	ed date Nature	of Debt	•	Nature of Business		•		
	rred date							
AN Split da	ate 📄							
County ANDREW								
	without a confirmed plan	From <b>T</b> o	<ul> <li>Include</li> </ul>	dismissed cases				
Sort by Fi	led Date 🔻	<b>•</b>	•					
Output Format 🍥	Formatted display Data only Include fiel	d descriptions						
Run Report Cl		-						

External users can now search for cases without a confirmed plan. When searching by unconfirmed plan dates, the 31-day range limit does not apply for this search.

Type of debtor, nature of debt, nature of business as well as county have been added to the selection screen

#### Cases Report – Data Only

In prior releases, when the Cases Report was run with "Party Information" not selected, a party's attorney information was displayed on the formatted data output, but not on the data-only output. Now the data-only output lists the attorney information for the parties in the Attorney last name field, as shown below.



If multiple attorneys exist for various parties, the role and attorney are listed, separated by semicolons, in the same field. For parties without an attorney, the text "Pro se" is displayed instead of the attorney name.

A new format option, "Include field descriptions," has been added for use when the data-only format is selected. The field descriptions are inserted in the header row.

# **Claims Summary Report**

A Claims Summary Report option has been added to the Claims Register. This new format gives the viewer a snapshot overview of the claims on the case.

SECF	Ba <u>n</u> kruptcy 🔫	Adversary 🔻	<u>Q</u> uery	Reports 🔻	<u>U</u> tilities 💌	<u>S</u> earch	Logout
Claims Regist	er						
Case number 1:1	2-bk-10031						
	editor ministrative	▲ ▼	Credito numbe				
Creditor name							
Claim number	to	🗖 Vi	ew multiple document	3			
• Filed • Entered	/1990 💼 to 6/4/20	12					
	aim Number 💌						
🗹 View claims sun	umary report						
Run Report	Clear						

The Claims Summary Report box produces a condensed list of claims.

ype: bk Assets: v	Chapter: 13 Judge: ls	•		Office: 1 (Pleasantville)				
Date Filed: 03/10/2011 Trustee: Kathleen Nelso	Last Date to File Claim	Last Date to File Claims: 07/07/2011		(Govt): 09/06/2011				
Claim #	Amount claimed *	Date filed	Creditor number	Creditor name				
1 <u>View</u>	\$37334	27 03/14/2011	32739	Ace Finance				
2 <u>View</u>	\$14335	00 03/15/2011	32779	Central Finance	Amount claimed: \$37334 27			
3 View	\$17554	00 03/17/2011	32739	Ace Finance	Secured claimed: \$37334.27			
4 <u>View</u>	\$24667	23 03/17/2011	32756	Lacks Furniture #19				
5 <u>View</u>	\$3700	00 03/17/2011	32739	Ace Finance	Ace Finance			
6 <u>View</u>	\$17346	78 09/16/2011	35278	2nd Savings and Loan Inc.				
7 <u>View</u>	\$12778	00 09/16/2011	35279	The Doctor's Plaza	The Doctor's Plaza			
8 View	\$87345	23 09/16/2011	35280	First Bank of Austin	First Bank of Austin			
Total Number of Claims: 8								

Hovering your cursor over the amount claimed will display a breakdown of the claim amounts. The View hyperlink takes you to more detailed information for this claim on the claims register. Click the creditor name to view claimant address or transfer information. You can sort the report by clicking the column headers. This reformatted summary can be especially helpful to you to sort by creditor name.

#### **Claims Register View Multiple Documents**

One can now view multiple documents from the Claims Register in one PDF file. This is the same functionality as View multiple documents on the Docket Report. This feature will enable you to generate selected PDF claims with any related attachments in one PDF document.

SECF	Ba <u>n</u> kruptcy <del>▼</del>	Adversary 👻	Query	Reports 🝷	<u>U</u> tilities +	<u>S</u> earch	Logout 🕜
Claims Reg	ister						
Case number	1:11-bk-10004						
Creditor type	Creditor Administrative		Cred	litor 1ber			
Creditor name		_					
Claim number	to	🗆 V	iew multiple docum	ients			
<ul> <li>Filed</li> <li>Entered</li> </ul>	1/1/1990 <b>to</b> 6/1	8/2012		_			
Sort by	Claim Number 🝷 Filed Date 🝷						
View claims : Run Report	Clear						

The Claims Register will include a checkbox next to each claim, claim attachment, or claim related proceeding to customize this document. Each PDF selected will be combined into one large PDF file. You could view or print all claims on a case or all PDF documents from certain creditors if desired.

SECF	Ba <u>n</u> ki	ruptcy 👻	Adversary 🝷	Quer	y Reports	• <u>U</u> tilities •	<u>S</u> earch	Logout		
SDSD										
Claims Register										
11-10004 Clinton H. Vesperman and Anna C. Vesperman										
	Judge: Lillian Strasberg Chapter: 13									
Office: Pleasa				ntville	Last Date to file claims: 07/07/2011					
Select All C	Trustee: Kathleen Nelson         Last Date to file (Govt): 09/06/2011           Select All         Clear All									
Creditor: (32739) Ace Finance Acet#: 3515 7121 W. Hwy 90 San Antonio, TX 78227 Claimant History			Claim No: 1 Original Filed Date: 03/14/2011 Original Entered Date: 08/24/2011		Status: Allow <u>3</u> Filed by: CR Entered by: JPW Modified: 04/24/2012					
Amount claimed Secured claimed										
History: Details • 1-1  03/14/2011 Claim #1 filed by First Nationwide Mortgage Corp, Amount claimed: \$37334.27 (JPW)										
3	3 Image: 33/21/2011 Transfer of Claim Transferor: First Nationwide Mortgage Corp (Claim No. 1) To Ecast Settlement Corporation (JPW) Additional attachment(s) added on 8/24/2011 (JPW).(JPW) (Entered: 03/21/2011). MODIFIED on (08/30/2011) Changed transferee from Ecast Settlement Corporation to Pioneer Funding group(Malin, Kate)(Entered: 08/30/2011). MODIFIED on (09/15/2011) to change transferee from Pioneer Funding group(Malin, Kate)(Entered: 09/15/2011). Status: Allow									
doo		03/23/2012 Notice of Mortgage Payment Change (Claim # 1) Filed by Joint Debtor Anna C. Vesperman , Debtor Clinton H. Vesperman (Orebaugh, Desiree)								

### Case Conversion

Previously, if a case was converted and re-converted, the Notice of Bankruptcy Case Filing query screen reflected the converted chapter rather than the original chapter. Now the original chapter is saved permanently in a new field. The original chapter will be correct for cases filed and converted after Release 5.



The original chapter and current chapter will also display on the Case Summary Query and the Docket Sheet for re-converted cases after Release 5. Case Summary is shown below.

