

CM-ECF Quick Reference Filing Guide

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U.S. Bankruptcy Court

Western District of New York



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revised January 29, 2004

How to Use This Quick Reference Guide:

- Click on items in "Contents" -or-
- "Search" for keywords

What is Displayed on Each Page:

- CM/ECF menu / link selections - the progression of CM/ECF menu choices you must make to perform the desired task
- Procedures, Notes, and Tips - the local procedural requirements applicable to each task

Need Help?

- In Buffalo, call 716-551-4130
- In Rochester, call 585-613-4200
- or send email to webmaster@nywb.uscourts.gov
- A printer-friendly version of this Guide is available. Because changes are made to this Guide frequently, please be sure your printed copy is the most current version, by checking the date "Last Updated."

Case_Opening_-_Schedules_-_Related_Activities

Chapter 7 BK Case

CM/ECF menu / link selections:

Bankruptcy > Open BK Case

Procedures, Notes and Tips:

* Use only if you are not using "one touch" upload software.

- Office: 1(Buffalo) or 2(Rochester)
- Role Type: First party entered is "Debtor," second party entered is "Joint Debtor."
- Be sure to add alias information and party text
- Be sure to complete statistical reporting screen
- Asset notice designation: Choose N (no)
- For receipt number Leave blank and use the credit card payment module for payment
- **Next: Go to Bankruptcy>Other>Voluntary Petition-Chapter 7** to file petition
- **DO NOT efile Form B21**

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Voluntary Chapter 7 Petition

CM/ECF menu / link selections:

Bankruptcy >Other >Voluntary Petition 7

Procedures, Notes and Tips:

* The petition must be filed after opening a BK case, if you are not using "one-touch" upload software.

- Attach a creditor matrix as a PDF
- Upload the creditors through upload creditors (Creditor Maintenance).

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Upload Creditors

CM/ECF menu / link selections:

[Bankruptcy](#) > [Creditor Maintenance](#) > [Upload a Creditor Matrix File](#)

- Creditor Matrix must be in .txt format. Use this when filing without "one touch" upload software

or if you need to upload individual creditors:

[Bankruptcy](#) > [Creditor Maintenance](#) > [Enter Individual Creditors](#)

Procedures, Notes and Tips:

- Enter Individual Creditors, as needed

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Amended Petition

CM/ECF menu / link selections:

[Bankruptcy](#) > [Other](#) > [Amendment \(No Fee Due\)](#)

Procedures, Notes and Tips:

- Indicate in text box reason why Petition is being amended
- Attach Cover Sheet
- Attach Certificate of Service

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Amended Schedules (where a filing fee is required)

CM/ECF menu / link selections:

Bankruptcy > Other > Amendment(Fee)

Procedures, Notes and Tips:

- Indicate in text box reason why Petition is being amended
- Pay filing fee (credit card)
- If adding creditors, see Upload Creditors
- Attach Cover Sheet
- Attach Certificate of Service

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Amended Schedules (with no filing fee required)

CM/ECF menu / link selections:

Bankruptcy > Other > Amendment (No Fee Due)

Procedures, Notes and Tips:

- Indicate in text box reason why Petition is being amended
- Attach Cover Sheet
- Attach Certificate of Service

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Amended or Supplemental Matrix

CM/ECF menu / link selections:

Bankruptcy > Other > Amended (Fee)

Procedures, Notes and Tips:

- Matrix must be in PDF format
- Pay filing fee (credit card)

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- Add new creditors to case; see upload creditor section
- Attach Cover Sheet

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Schedules and Statement of Affairs

CM/ECF menu / link selections:

Bankruptcy > Other > select appropriate documents such as Schedules A-J; Statement of Affairs; Statement of Intent

Procedures, Notes and Tips:

- To select multiple documents, press and hold the CTRL key on your keyboard and single-click (with your mouse) on the documents you wish to select
- Do not use when filing an amendment to documents already filed..use amendment, instead
- Attach Schedule/Amendment Cover Sheet
- Attach Certificate of Mailing

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Reaffirmation Agreement

CM/ECF menu / link selections:

Bankruptcy > Other > Reaffirmation Agreement

Procedures, Notes and Tips:

- Select party from list or Add/create new party
- Enter creditor in text box

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Notice of Appearance and Request for Notice - (filed by an attorney representing a party to add a party to a case)

CM/ECF menu / link selections:

Bankruptcy > Other > Notice of Appearance and Request for Notice

Procedures, Notes and Tips:

- Select party from list or Add/create new party with Role Type of Creditor
- Add party

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Creditor's Request for Notice (filed by a creditor)

CM/ECF menu / link selections:

Bankruptcy > Other > Creditor's Request for Notice

Procedures, Notes and Tips:

- This event adds a creditor to the mailing matrix only for purposes of future mailings
- Select party from list or Add/create new party with Role Type of Creditor
- Add creditor (See Add Creditor Instructions)

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Chapter 11 Case (without one touch upload software)

CM/ECF menu / link selections:

[Bankruptcy > Open BK Case](#)

Procedures, Notes and Tips:

* Use this only if you not using "one touch" upload software.

- Office: 1 (Buffalo) or 2 (Rochester)
- Role type: (debtor: joint debtor)
- Be sure to add alias information and any party text
- Be sure to complete statistical reporting screen
- Assets notice designation: Choose y (yes)
- For receipt number Leave blank and use the credit card payment module for payment
- Go to [Bankruptcy>Other>Voluntary Petition - Chapter 11](#) to file petition.

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Voluntary Chapter 11 Petition

CM/ECF menu / link selections:

[Bankruptcy >Other >Voluntary Petition 11](#)

Procedures, Notes and Tips:

- The petition must be filed after opening a BK case, if you are not using "one touch" upload software.
- Attach .pdf of petition and schedules
- Attach .pdf of creditor matrix
- Upload creditors through Upload Creditors (creditor maintenance)

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Operating Report

CM/ECF menu / link selections:

[Bankruptcy > Other > Operating Report](#)

Procedures, Notes and Tips:

- Enter filing period (e.g., "October 1, 2001 to October 30, 2001")

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Application to Employ Attorney for Debtor

CM/ECF menu / link selections:

Bankruptcy > Motions/Applications > Employ

Procedures, Notes and Tips:

- Select Debtor as filer
- Enter name of person to be employed when prompted (e.g. "Bill Jones")
- Enter type of position when prompted (e.g., "Attorney for Debtor")

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Affidavit Regarding an Application to Employ

CM/ECF menu / link selections:

Bankruptcy > Other > Affidavit

Procedures, Notes and Tips:

- Refer to Application (found under motion)
- Enter name in first text box (e.g., "Bill Jones")
- Enter title of related Application in second text box (e.g., "Application to Employ")

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Application for Compensation by Attorney for Debtor

CM/ECF menu / link selections:

Bankruptcy > Motions/Applications > Compensation

Procedures, Notes and Tips:

- Check Attorney for Debtor as filer
- Enter type as Debtor's Attorney
- Enter dates from when, to when
- Enter fees requested and expenses requested (e.g., "2000.00 and 125.00"). **DO NOT use "\$"**
- Skip second applicant if present on screen

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Disclosure Statement

CM/ECF menu / link selections:

Bankruptcy > Plan > Disclosure Statement

Procedures, Notes and Tips:

- Be sure to attach the disclosure statement

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Plan

CM/ECF menu / link selection:

Bankruptcy > Plan > Chapter 11 Plan

Procedures, Notes and Tips:

- Be sure to attach the disclosure statement

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Amended Disclosure Statement

CM/ECF menu / link selections:

[Bankruptcy](#) > [Plan](#) > [Amended Disclosure Statement](#)

Procedures, Notes and Tips:

- Refer to Disclosure Statement
- Use prefix to describe; i.e. first, second

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Amended Plan

CM/ECF menu / link selections:

[Bankruptcy](#) > [Plan](#) > [Amended Chapter 11 Plan](#)

Procedures, Notes and Tips:

- Refer to Plan
- Use prefix to describe; i.e. first, second

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Ballot

CM/ECF menu / link selections:

[Bankruptcy](#) > [Other](#) > [Chapter 11 Ballots](#)

Procedures, Notes and Tips:

- Be sure to attach ballot

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Application for Final Decree

CM/ECF menu / links selections:

[Bankruptcy](#) > [Motions/Applications](#) > [Final Decree](#)

Procedures, Notes and Tips:

- Clerk's office will enter Final Decree and close case if no objections are filed

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Chapter 11 Final Report

CM/ECF menu / link selections:

[Bankruptcy](#) > [Other](#) > [Chapter 11 Final Report & Account](#)

Procedures, Notes and Tips:

- Be sure to attach the final report and account

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Chapter 12 Case - (without using case preparation software)

CM/ECF menu / link selections

Bankruptcy > Open BK Case

Procedures, Notes and Tips:

*** Use this only if you not using "one touch" upload software.**

- Office: 1 (Buffalo) or 2 (Rochester)
- Role Type: First party entered is "Debtor," second party entered is "Joint Debtor."
- Be sure to add alias information and party text
- Be sure to complete statistical reporting screen
- Asset notice designation: Choose y (yes)
- For receipt number Leave blank and use the pay module for payment
- Go to [Bankruptcy>Other>Voluntary Petition - Chapter 12](#) to file petition.

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Voluntary Chapter 12 Petition

CM/ECF menu / link selections:

Bankruptcy >Other >Voluntary Petition 12

Procedures, Notes and Tips:

- **The petition must be filed after opening a BK case, if you are not using "one-touch" upload software**
- Creditor matrix
- Upload creditors

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Chapter 12 Plan

CM/ECF menu / link selections:

Bankruptcy > Plan > Chapter 12 Plan

Procedures, Notes and Tips:

- Be sure to attach the plan

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Chapter 13 Case (without one touch upload software)

CM/ECF menu / link selections:

Bankruptcy > Open BK Case

Procedures, Notes and Tips:

*** Use this only if you not using "one touch" upload software.**

- Office: 1 (Buffalo) or 2 (Rochester)
- Role Type: First party entered is "Debtor," second party entered is "Joint Debtor."
- Be sure to add alias information and party text
- Be sure to complete statistical reporting screen
- Asset notice designation: Choose y (yes)
- For receipt number, leave blank and use the pay module for payment
- Go to Bankruptcy>Other>Voluntary Petition - Chapter 13 to file petition.

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Voluntary Chapter 13 Petition

CM/ECF menu / link selections:

Bankruptcy >Other >Voluntary Petition 13

Procedures, Notes and Tips:

*** The petition must be filed after opening a BK case, if you are not using "one touch" upload software.**

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Chapter 13 Plan

CM/ECF menu / link selections:

[Bankruptcy](#) > [Plan](#) > [Chapter 13 Plan](#)

Procedures, Notes and Tips:

- Attach the plan

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Chapter 13 Amended Plan - Pre-Confirmation

CM/ECF menu / link selections:

[Bankruptcy](#) > [Plan](#) > [Amended Chapter 13 Plan](#)

Procedures, Notes and Tips:

- Refer to Plan
- Attach Schedule Amendment Cover Sheet if Plan is amended pre-confirmation.

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Chapter 13 Amended Plan - Post-Confirmation

CM/ECF menu / link selections:

[Bankruptcy](#) > [Motion/Applications](#) > [Modify Plan](#)

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Procedures, Notes and Tips:

- Attach amended Plan

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Claim_Related_Activity

Proof of Claim

CM/ECF menu / link selections:

[Bankruptcy > File Claims](#)

Procedures, Notes and Tips:

- On “Search for Creditor” screen, enter name of creditor for whom the proof of claim is being filed; leave type as creditor; click next
- If the creditor appears on the screen, select creditor and click next; if creditor does not appear with the EXACT name and address on the claim, click on add creditor which allows you to add a creditor to the case
- Enter the following:
 - Amends Claim # (if applicable)
 - Duplicates Claim # (if applicable)
 - Filed By: (select trustee)
 - Late:(yes or no)
 - Amount Claimed
 - Description (if necessary)
 - Remarks (if necessary)

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Withdrawal of Claim

CM/ECF menu / link selections:

[Bankruptcy > Claim Actions > Withdrawal of Claim](#)

Procedures, Notes and Tips:

- Attach PDF of withdrawal document
- Enter “Claim #” and “Status” at prompts
- Enter name of Claimant in text box

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Claim Recommendation

CM/ECF menu / link selections:

Bankruptcy > Trustee/US Trustee > Claim Recommendation

Procedures, Notes and Tips:

- Attach PDF Claim Recommendation
- Enter recommendation in text box, e.g., (recommend that claim be allowed)

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Objection to Claim (Rochester Only)

CM/ECF menu / link selections:

Bankruptcy > Motions/Applications > Objection to Claim

Procedures, Notes and Tips:

- Attach PDF Objection/Affidavit in Support
- Enter Claim # when prompted
- Enter name of creditor in text box
- Docket each objection separately

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Objection to Claim (Buffalo Only)

CM/ECF menu / link selections:

Bankruptcy > Motions/Applications > Objection to Claim

Procedures, Notes and Tips:

- Attach PDF Objection/Affidavit in Support
- Enter Claim #s, separated by "commas."
- Attach "Certificate of Service" as PDF.

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Transfer of Claim

CM/ECF menu / link selections:

[Bankruptcy](#) > [Claim Actions](#) > [Transfer of Claim](#)

Procedures, Notes and Tips:

- Attach "Certificate of Service" as PDF.

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Objection to Transfer of Claim

CM/ECF menu / link selections:

[Bankruptcy](#) > [Claim Actions](#) > [Objection to Transfer of Claim](#)

Procedures, Notes and Tips:

- Attach "Certificate of Service" as PDF.

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Litigation - Contested Matters

Motions - Applications

Motion or Application

CM/ECF menu / link selections:

Bankruptcy > Motions/Applications > (select type of motion/application from list)

Procedures, Notes and Tips:

- For Judge Kaplan and Judge Bucki Cases - always confirm the date/time/location of the hearing with the secretary before filing your motion.
- Attach PDF - Notice of Motion, Motion and Affidavit equal Main Document
- Attach Exhibits
- Attach Certificate of Service
- Attach Cover Sheet - **ROCHESTER DEFAULT ONLY**
- Attach Proposed Order - **ROCHESTER DEFAULT ONLY**
- If prompted for a filing fee, leave Receipt box blank.
- Use credit card payment module for motions requiring fees.

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Stipulation to a Motion

CM/ECF menu / link selections:

Bankruptcy > Motions/Applications > SELECT APPROPRIATE RELIEF

Procedures, Notes and Tips:

- Select yourself (trustee) as the party filer
- Attach PDF
- Add "on Stipulation" to text

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Amended Motion or Application

CM/ECF menu / link selections:

Bankruptcy > Motions/Applications > (Select “Amended Application” or “Amended Motion” from list)

Procedures, Notes and Tips:

- Attach PDF- Notice of Motion, Motion and Affidavit on the Main Document
- Attach Exhibits
- Attach Certificate of Service
- Attach Cover Sheet -ROCHESTER DEFAULT ONLY
- Attach Proposed Order - ROCHESTER DEFAULT ONLY
- Refer to original Motion/Application (found under motion)

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Affidavit in Support

CM/ECF menu / link selections:

Bankruptcy > Other > Affidavit

Procedures, Notes and Tips:

- Generally, included with Notice of Motion and Motion as part of the “main document”. This option may be used for supplemental or responsive affidavits.
- Check box “Refer to Existing Events” and, on next screen, select appropriate category of existing event
- Check box to specify the particular motion or other “event” to which Affidavit applies
- Type in name of person executing Affidavit in text box

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Supporting Brief

CM/ECF menu / link selections:

[Bankruptcy](#) > [Other](#) > [Brief](#)

Procedures, Notes and Tips:

- Attach PDF
- Refer to Motion (found under motion)

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Memorandum of Law

CM/ECF menu / link selections:

[Bankruptcy](#) > [Other](#) > [Memorandum of Law](#)

Procedures, Notes and Tips:

- Attach PDF
- Refer to Motion (found under motion)
- Enter "Support of title of document" or "Opposition to title of document" when prompted

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Proof of Service

CM/ECF menu / link selections:

[Bankruptcy](#) > [Other](#) > [Certificate of Service](#)

Procedures, Notes and Tips:

- Attach PDF of Certificate of Service
- Check box "Refer to Existing Events"
- Select category of event. A list of event categories is displayed. Select all [by clicking and dragging] to get the entire Docket. If you do not know the category or select one or more categories from the list by highlighting and clicking "next."
- Check box for specific events to which proof of service applies

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Objections_ -_Hearings

File an Objection or Opposition to a Motion or Application

CM/ECF menu / link selections:

[Bankruptcy](#) > [Answer](#) > [Reference an Existing motion/application](#) > [Objection](#)

Procedures, Notes and Tips:

- Select "Objection" from drop down list
- Attach PDF of Objection/Opposition
- Check box for particular Motion at issue
- Use text box to add any additional information deemed necessary

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Reply or Response to a Motion or Application

CM/ECF menu / link selections:

[Bankruptcy](#) > [Answer](#) > [Reference an Existing motion/application](#) > [Reply or Response](#)

Procedures, Notes and Tips:

- Attach PDF of Reply/Response
- Check box for particular Motion/Application at issue
- Use text box to add any additional information deemed necessary

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Adversary_Proceedings

Commence Adversary Proceeding and Complaint

CM/ECF menu / link selections:

Adversary > Open AP Case/Misc Case

Procedures, Notes and Tips:

- Enter BK Case # as "Lead Case Number"
- Enter Plaintiff(s) name at "Search for Party" prompt (Add address etc. and pick "Plaintiff" for "Role")
- NOTE: CLICK "ATTORNEY" BUTTON BEFORE PROCEEDING & ADD YOURSELF AS PLAINTIFF'S ATTORNEY
- After adding the Plaintiff and yourself as Attorney, click "Submit"
- Enter Defendant's name and address information, specify "Role" as "Defendant" (DO NOT add attorney for Defendant) and click "Submit"
- Enter statistical case information taken from the Adversary Cover Sheet
 - Only one nature of suit can be selected,
 - If Complaint demands denial of discharge under Section 727, always select "424" as "Nature of Suit";
 - Enter demand to the nearest thousand (e.g., 5 for \$5,000)
- Attach PDF Complaint
- Enter "Deferred" in "Receipt #" box and "0.00" for Fee

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Service of Summons

CM/ECF menu / link selections:

Adversary> Complaint/Summons> Summons Service Executed

Procedures, Notes and Tips:

- Case Number is AP Number
- Attach PDF of service document
- Select Party/Parties Served
- Enter Date Served

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Summons Returned - Not executed

CM/ECF menu / link selections:

Adversary > Complaint/Summons > Summons Service Unexecuted

Procedures, Notes and Tips:

- Case Number is AP Number
- Attach PDF
- Select the Party/Parties you did not serve
- Court will re-issue Summons if requested.

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Answer

CM/ECF menu / link selections:

Adversary > Answers > Complaint, 3rd Cross, Counter

Procedures, Notes and Tips:

- Enter AP Number
- Select the Defendant(s) for whom the Answer is being filed
- Attach PDF of Answer
- Check box if “Third-Party,” “Cross-Claim,” or “Counterclaim”
- Use text box to describe answering defendant

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Adversary Motion or Application

CM/ECF menu / link selections:

Adversary > Motions

Procedures, Notes and Tips:

- Enter AP Number
- Same process as for “Motions” supra

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Brief or Memorandum

CM/ECF menu / link selections:

[Bankruptcy](#) > [Other](#)> [Brief/Memorandum](#)

Procedures, Notes and Tips:

- Refer to Motion (found under motion)
- Select category of event. A list of event categories is displayed. Select all [by clicking and dragging] to get the entire Docket. If you do not know the category or select one or more categories from the list by highlighting and clicking "next."
- Enter "Support of title of document" or "Opposition to title of document" when prompted

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Stipulation

CM/ECF menu / link selections:

[Adversary](#) > [Motions](#) > [Stipulation](#)

Procedures, Notes and Tips:

- Select yourself (trustee) as the party filer
- Attach PDF of Stipulation
- Enter parties to Stipulation in text box
- Enter title of related document and/or brief summary of stipulation in text box
- All proposed orders must be submitted to Chambers w/copy of the stipulation

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Appeals

Notice of Appeal

CM/ECF menu / link selections:

[Bankruptcy](#) > [Appeal](#) > [Notice of Appeal](#)

Procedures, Notes and Tips:

- Attach PDF of Notice of Appeal
- Refer to event
- Select category of event. A list of event categories is displayed. Select all [by clicking and dragging] to get the entire Docket. If you do not know the category or select one or more categories from the list by highlighting and clicking “next.”
- Describe Order being appealed in text box
- Leave receipt field blank
- Use credit card payment module

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Leave to Appeal

CM/ECF menu / link selections:

[Bankruptcy](#)>[Motions](#)>[Leave to Appeal](#)

Procedures, Notes and Tips:

- Attach PDF of Leave to Appeal
- Link to Order being appealed

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Appellant Designation

CM/ECF menu / link selections:

[Bankruptcy](#) > [Appeal](#) > [Appellant Designation](#)

Procedures, Notes and Tips:

- Attach PDF of Designation
- Check box for specific Notice of Appeal
- System will automatically calculate Appellant Designation due date

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Appellee Designation

CM/ECF menu / link selections:

[Bankruptcy](#) > [Appeal](#) > [Appellee](#) > [Designation](#)

Procedures, Notes and Tips:

- Attach a PDF of designation
- Check box for Specific Notice of Appeal

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Statement of Issues on Appeal

CM/ECF menu / link selections:

[Bankruptcy](#) > [Appeal](#) > [Statement of Issues on Appeal](#)

Procedures, Notes and Tips:

- Attach PDF of Statement of Issues
- Check box for specific Notice of Appeal

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Request for a Transcript

CM/ECF menu / link selections:

[Bankruptcy](#) > [Appeal](#) > [Request for Transcript re: Appeal](#)

Procedures, Notes and Tips:

- Attach PDF of Transcript
- Check box for specific Notice of Appeal

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Transcript

CM/ECF menu / link selections:

[Bankruptcy](#) > [Appeal](#) > [Transcript Re: Appeal](#)

Procedures, Notes and Tips:

- Attach PDF of transcript (ask Court Reporter for electronic copy if available)
- Refer to previous motion (found under court) and check box for specific Notice of Appeal
- Enter title of Order be appealed in text box

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Trustee-Specific_Activities

Chapter_7_Cases

341 Minutes - Notes (Docketing 341 Activity Case-by-Case using a Traditional Minute Sheet)

CM/ECF menu / link selections:

Bankruptcy > Trustee/US Trustee > Meeting of Creditors Continued

Procedures, Notes and Tips:

- Attach PDF copy of Minute Sheet
- Insert new date, time, location

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341 Minutes - NDR Meeting(s) Closed (Enter 341 Activity for Multiple Cases) VIRTUAL - TEXT ONLY

CM/ECF menu / link selections:

Bankruptcy > Trustee's 341 Filings > Trustee's 341 Filings-Closed > Enter 341 Meeting Date

Procedures, Notes and Tips:

- Skip on this Screen - Default Setting; Case will remain on list unless other options selected
- Debtor Appeared-Meeting Closed - NDR language will appear on docket (tape # and notes can be included)
- Meeting Closed - Asset case or presently undetermined, but no further 341 hearing is scheduled

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341 Minutes - Notes Meeting(s) Continued (Enter 341 Activity for Multiple Cases) VIRTUAL - TEXT ONLY

CM/ECF menu / link selections:

Bankruptcy > Trustee's 341 Filings > Trustee's 341 Filings-Continued > Enter Meeting Date

Procedures, Notes and Tips:

- Skip on this Screen - Default Setting; Case will remain on list unless other options selected
- Continue To-Debtor Appeared - Enter adjourned date, time, tape number and any notes or comments
- Continue To-Debtor Did NOT Appear - Enter adjourned date, time, tape number and any notes or comments

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No Asset Report (Docketing NDR Case-by-Case using Traditional NDR)

CM/ECF menu / link selections:

Bankruptcy > Trustee/US Trustee > No Asset Report

Procedures, Notes and Tips:

- Attach PDF copy of the No Asset Report

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No Asset Report (Docketing NDR Case-by-Case) VIRTUAL _ TEXT ONLY

CM/ECF menu / link selections:

Bankruptcy > Trustee/US Trustee > Ch. 7 Trustee's Report of No Distribution

Procedures, Notes and Tips:

- Virtual Text - no document is attached

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Objection to Exemptions

CM/ECF menu / link selections:

Bankruptcy > Motions/Applications > (enter case number) > Objection to Exemptions

Procedures, Notes and Tips:

- Attach claim objection as PDF

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Motion to Abandon

CM/ECF menu / link selections:

Bankruptcy > Motions/Application > Abandon

Procedures, Notes and Tips:

- Select "Trustee" as party
- Attach PDF copy of Motion
- Type "Deferred" in receipt field
- Enter description of property being abandoned in text box

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Intent to Abandon

CM/ECF menu / link selections:

[Bankruptcy](#) > [Trustee/US Trustee](#) > [Statement of Intent](#)

Procedures, Notes and Tips:

- Attach PDF copy of Notice of Intent
- Enter description of property being abandoned in text box

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Intent to Sell (Private Sale)

CM/ECF menu / link selections:

[Bankruptcy](#) > [Trustee/US Trustee](#) > [Statement of Intent](#)

Procedures, Notes and Tips:

- Attach PDF copy of Notice of Intent
- Enter description of property to be sold in text box

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Intent to Sell (Public Sale)

CM/ECF menu / link selections:

[Bankruptcy](#) > [Trustee/US Trustee](#) > [Statement of Intent](#)

Procedures, Notes and Tips:

- Attach PDF copy of Notice of Intent
- Enter description of property to be sold in text box

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Intent to Sell All (Assets Less than \$2,500) - Long Description

CM/ECF menu / link selections:

Bankruptcy > Trustee/US Trustee > Statement of Intent

Procedures, Notes and Tips:

- Attach PDF copy of Notice of Intent
- Enter description of property to be sold in text box

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Intent to Sell All (Assets Less than \$2,500) - Short Description

CM/ECF menu / link selections:

Bankruptcy > Trustee/US Trustee > Statement of Intent

Procedures, Notes and Tips:

- Attach PDF copy of Notice of Intent
- Enter description of property to be sold in text box

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Application by Trustee to Employ Attorney

CM/ECF menu / link selections:

Bankruptcy > Motions/Application > Employ

Procedures, Notes and Tips:

- Attach PDF copy of Application and supporting Affidavit(s)
- Enter "Name of Person to be Employed" and "Position" in text boxes
- Add any additional information in text box on "docket text" screen

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Withdraw No Asset Report - VIRTUAL - TEXT ONLY

CM/ECF menu / link selections:

[Bankruptcy](#) > [Trustee/US Trustee](#) > [Withdrawal of No Asset Report](#)

Procedures, Notes and Tips:

- Refer to Trustee Report of No Distribution/No Assets
- Letter not necessary.

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Trustee's Request for Court to Issue Notice of Probable Assets - VIRTUAL - TEXT ONLY

CM/ECF menu / link selections:

[Bankruptcy](#) > [Trustee/US Trustee](#) > [Asset Letter \(Trustee Use Only\)](#)

Procedures, Notes and Tips:

- Court will issue the Notice of Probable Assets
- Letter not necessary.

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Trustee's Request for Court to Issue Notice of Surplus - VIRTUAL - TEXT ONLY

CM/ECF menu / link selections:

[Bankruptcy](#) > [Trustee/US Trustee](#) > [Request for Notice of Surplus](#)

Procedures, Notes and Tips:

- Court will issue the Notice of Surplus
- Letter not necessary.

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Trustee's Report of Sale

CM/ECF menu / link selections:

[Bankruptcy](#) > [Trustee/US Trustee](#) > [Report of Sale](#)

Procedures, Notes and Tips:

- Attach PDF of Report of Sale

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Trustee's Report of Distribution

CM/ECF menu / link selections:

[Bankruptcy](#) > [Trustee/US Trustee](#) > [Report of Distribution](#)

Procedures, Notes and Tips:

- Attach PDF of Report of Distribution

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Final Report - Account with Notice

CM/ECF menu / link selections:

[Bankruptcy](#) > [Trustee/US Trustee](#) > [Final Rpt/Acct-Asset](#)

Procedures, Notes and Tips:

- Main document is Final Report

- File the “Notice of Final Account” as an attachment to the “main document.” The Clerk’s Office will docket the “Notice” and send to all creditors through the BNC.

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Application for Compensation by Attorney for Trustee (Where Trustee is Representing Self as Attorney)

CM/ECF menu / link selections:

[Bankruptcy](#) > [Motions/Applications](#) > [Compensation](#)

Procedures, Notes and Tips:

- Indicate whether compensation is for you (y/n)
- “Filer” box is checked by default
- “Type” box must be changed to “Attorney for Trustee” (DEFAULTS TO “BLANK”)
- Enter dates covered by application “From dd/mm/yyyy” “To dd/mm/yyyy”
- Enter “Fees and Expenses” (format: 2000.00, NOT \$2,000.00)

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Application for Compensation for Other Professionals Retained by Trustee (Other than Attorney for Trustee)

CM/ECF menu / link selections:

[Bankruptcy](#) > [Motions/Applications](#) > [Compensation](#)

Procedures, Notes and Tips:

- Indicate whether compensation is for you (y/n)
- NOTE: “Filer” box is un-checked
- “Type” box must be changed to appropriate category for the professional (DEFAULTS TO “BLANK”)
- Enter dates covered by application “From dd/mm/yyyy” “To dd/mm/yyyy”

- Enter “Fees and Expenses” (format: 2000.00, NOT \$2,000.00)

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Final Account

CM/ECF menu / link selections:

[Bankruptcy](#) > [Trustee/US Trustee](#) > [Final Rpt/Acct-Asset](#)

Procedures, Notes and Tips:

- Attach PDF copy of Final Report and Account - Asset

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Chapter_11_Cases

341 Minute Report (Meeting Held and Concluded)

CM/ECF menu / link selections:

[Bankruptcy](#) > [Trustee/US Trustee](#) > [341 Meeting of Creditors Held](#)

Procedures, Notes and Tips:

- Attach PDF of Minute Sheet
- Satisfies pending meeting of creditors

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341 Minute Report (Meeting held and Adjourned)

CM/ECF menu / link selections:

[Bankruptcy](#) > [Trustee/US Trustee](#) > [341 Meeting of Creditors Continued](#)

Procedures, Notes and Tips:

- Attach PDF of Minute Sheet
- Specify date, time, location of adjourned 341

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Statement of US Trustee Concerning Inability to Appoint a Creditors' Committee - VIRTUAL - TEXT ONLY

CM/ECF menu / link selections:

[Bankruptcy](#) > [Trustee/US Trustee](#) > [UST Statement Re: Creditors' Committee](#)

Procedures, Notes and Tips:

- Virtual Text - no document is attached

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Notice of Appointment of Creditors' Committee

CM/ECF menu / link selections:

[Bankruptcy](#) > [Trustee/US Trustee](#) > [Creditors Committee](#)

Procedures, Notes and Tips:

- Attach PDF list of members.

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Notice of Appointment of Trustee - VIRTUAL - TEXT ONLY

CM/ECF menu / link selections:

Bankruptcy > Trustee/US Trustee > Notice Appointing Trustee

Procedures, Notes and Tips:

- Virtual Text - no document is attached

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Objection to Disclosure Statement

CM/ECF menu / link selections:

Bankruptcy > Plan > Objection to Disclosure Statement

Procedures, Notes and Tips:

- Attach PDF
- Check box "Refer to Existing Events"
- Select category of event. A list of event categories is displayed. Select all [by clicking and dragging] to get the entire Docket. If you do not know the category or select one or more categories from the list by highlighting and clicking "next."
- Select "Disclosure Statement"

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Objection to Confirmation of Plan

CM/ECF menu / link selections:

Bankruptcy > Trustee/US Trustee > Objection to Confirmation of Plan

Procedures, Notes and Tips:

- Attach PDF
- Check box "refer to existing events"
- Select category of event. A list of event categories is displayed. Select all (by clicking and dragging) to get the entire docket. If you do not know the category or select one or more categories from the list by highlighting and clicking "next".

- Select "Plan"

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Chapter_12_and_13

341 Minute Report (Meeting Held and Concluded)

CM/ECF menu / link selections:

Bankruptcy > Trustee/US Trustee > 341 Meeting of Creditors Held

Procedures, Notes and Tips:

- Attach PDF of Minute Sheet
- Satisfies pending meeting of creditors

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341 Minute Report (Meeting Held and Adjourned)

CM/ECF menu / link selections:

Bankruptcy > Trustee/US Trustee > 341 Meeting of Creditors Continued

Procedures, Notes and Tips:

- attach PDF of Minute Sheet
- specify date, time, location of adjourned 341

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Notice Allowing Chapter 13 Claims

CM/ECF menu / link selections:

Bankruptcy > Trustee/US Trustee > Notice Allowing Chapter 13 Claims

Procedures, Notes and Tips:

- Attach PDF of Notice Allowing Chapter 13 claims
- Attach Certificate of Service

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Notice allowing Additional Chapter 13 Claims

CM/ECF menu / link selections:

Bankruptcy > Trustee/US Trustee > Notice Allowing Additional Chapter 13 Claims

Procedures, Notes and Tips:

- Attach PDF of Notice Allowing Additional Chapter 13 claims
- Attach Certificate of Service

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Notice Releasing

CM/ECF menu / link selections:

Bankruptcy > Trustee/US Trustee > Notice Releasing

Procedures, Notes and Tips:

- Attach PDF of Notice Releasing

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Chapter 13 Trustee's Plan Recommendation

CM/ECF menu / link selections:

Bankruptcy > Trustee/US Trustee > Chapter 13 Plan Recommendation

Procedures, Notes and Tips:

- Attach PDF
- Enter Recommended/Not Recommended in text box

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Chapter 13 Trustee's Notice of Amended Plan

CM/ECF menu / link selections:

Bankruptcy > Trustee/US Trustee > Notice of Amended Plan

Procedures, Notes and Tips:

- Attach PDF of Notice of Amended Plan
- Attach Certificate of Service

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Chapter 13 Trustee's Notice of Amended Valuation

CM/ECF menu / link selections:

Bankruptcy > Trustee/US Trustee > Chapter 13 Trustee's Notice of Amended Valuation

Procedures, Notes and Tips:

- Attach PDF of Notice of Amended Valuation

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Chapter 13 Trustee's Motion to Dismiss Case

CM/ECF menu / link selections:

[Bankruptcy >Trustee/US Trustee> Motion to Dismiss Case](#)

Procedures, Notes and Tips:

- Attach PDF of Notice of Motion to Dismiss Case
- Attach Certificate of Service

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Chapter 12 Final Report and Account and Notice

CM/ECF menu / link selections:

[Bankruptcy > Trustee/US Trustee > Chapter 12 Trustee's Final Report and Account](#)

Procedures, Notes and Tips:

- Trustee will file the Final Account and Notice together. The Clerk's Office will docket the Notice and send to all creditors.

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Chapter 13 Closing Report

CM/ECF menu / link selections:

[Bankruptcy >Trustee/ US Trustee>Chapter 13 Closing Report](#)

Procedures, Notes and Tips:

- Attach PDF of Closing Report

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Chapter 13 Final Report and Account and Notice

CM/ECF menu / link selections:

[Bankruptcy > Trustee/US Trustee > Chapter 13 Trustee's Final Report and Account](#)

Procedures, Notes and Tips:

- Trustee will file the Final Account and Notice together.
- Attach Certificate of Service

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Chapter 13 Summary of Final Report and Account

CM/ECF menu / link selections:

[This procedure is still being worked on.](#)

Procedures, Notes and Tips:

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Notice of Distribution

CM/ECF menu / link selections:

[Bankruptcy > Trustee/US Trustee > Notice of Distribution](#)

Procedures, Notes and Tips:

- Attach PDF
- Attach Certificate of Service

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Utilities - Reports - Help

Change my Password

CM/ECF menu / link selections:

Utilities > Maintain Your ECF Account > More User Information

Procedures, Notes and Tips:

- Click on "More User Information"
- Enter new password
- Click "Return to Account Screen"
- Click "Submit"

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Transaction Log

CM/ECF menu / link selections:

Utilities > View Your Transaction Log

Procedures, Notes and Tips:

- Enter start date and end date

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Payment History

CM/ECF menu / link selections:

Utilities > Review Billing History

Procedures, Notes and Tips:

- enter dates

CM-ECF Quick Reference Filing Guide

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Payments Due

CM/ECF menu / link selections:

[Utilities](#) > [Review Billing History](#)

Procedures, Notes and Tips:

- enter dates
- sort by date or client code

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Creditor Mailing Matrix

CM/ECF menu / link selections:

[Reports](#) > [Creditor Mailing Matrix](#)

Procedures, Notes and Tips:

- Requires PACER log-in
- The 1-column file can be saved as a "text file" (.txt) on your computer with the "File/Save As" browser option. The saved file can then be edited and printed on labels.

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Docket Report

CM/ECF menu / link selections:

[Reports](#) > [Docket Report](#)

Procedures, Notes and Tips:

- Requires PACER log-in

- Enter case number
- Select criteria for generating the report (Leave HTML checked)
- Specify "Sort by" to your preference and Click Run Report

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Claims Register

CM/ECF menu / link selections:

[Reports](#) > [Claims Register](#)

Procedures, Notes and Tips:

- Requires PACER log-in
- Enter case number
- Choose a date field large enough to capture all claims
- Click Run Report

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Cases Report

CM/ECF menu / link selections:

[Reports](#) > [Cases](#)

Procedures, Notes and Tips:

- Requires PACER log-in
- Select criteria for generating the report (select multiple categories by holding down the Ctrl key and clicking on the categories in the list)
- Click Run Report

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341 Meeting Calendars

CM/ECF menu / link selections:

Reports > Calendar Events > 341 Meeting (or other calendar event listed)

Procedures, Notes and Tips:

- Requires PACER log-in
- Select criteria for generating the report (select multiple categories by holding down the Ctrl key and clicking on the categories in the list)
- Click Run Report

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Judge's Calendars

CM/ECF menu / link selections:

Reports > Calendar Events > Select hearing from Calendar Event list

Procedures, Notes and Tips:

- Refer to Judge's calendars are available on our website.

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Select the Party

CM/ECF menu / link selections:

Not Applicable (see below)

Procedures, Notes and Tips:

- Select the party that you represent from the list; Trustees will select themselves as trustee. If the party is not listed, select the Add/Create New Party button. For certain types of filings, you may also have the option of selecting a group of parties rather than individuals.

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Add a Party

CM/ECF menu / link selections:

Not Applicable (see procedures below)

Procedures, Notes and Tips:

- Search for the party.
 - Begin by searching to see whether the party is already in the database.
 - To search enter all or part (93 letters) of the last or business name, and click the Search button.
- Select a party already in the database or add a new one.
 - If the party is already in the database, highlight the name on the party list, and click the “Select name from list” button.
 - To add a new party to the database, click the “Create new party” button. In either instance, the Party Information screen will be displayed.
- Enter the information about the party.
 - For a party already in the database, fill in the party “Role” and pro se fields, and enter party text if needed. (Party text appears after the party’s name on the cover sheet of the docket, e.g., ABC Corporation, a subsidiary of XYZ International.)
 - To change address information just for this case for a party already in the database, type over the existing address information.
 - For a new party, fill in the name, address, party role, and pro se fields, and enter party text if needed.
- Click Submit only after all attorneys and aliases have been added.
 - If the case being opened is a joint petition, the search screen will be displayed for the joint debtor, with a check box to copy the first debtor’s address information.
 - If the case being opened is an adversary proceeding, or if a party is being added after the case has been opened, the search screen will be displayed for the next party. When the last party has been added, click the End party selection button.

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Message - The Following Attorney - Party Associations Do Not Exist

CM/ECF menu / link selections:

Not Applicable - (see procedures below)

Procedures, Notes and Tips:

- If you see these words: "The following attorney/party associations do not exist for this case. Please check which associations should be created for this case". You have selected an attorney and a party who were not previously associated. You may have checked the wrong person on the party list. If so, use the Back button to change the selection. If your selection was correct, check the box for each new party/attorney combination that should be established.

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How to Select a PDF Document

CM/ECF menu / link selections:

Not applicable (see procedures below)

Procedures, Notes and Tips:

- Type in the file name of the PDF document containing the pleading you are filing; or click on the Browse button to search your network and select from those files. Remember to change the file type to "All Files" (*.*) if you are using Netscape. If your filing has attachment(s) (e.g., financing papers, exhibits, etc.), **click Yes** for "Attachments to Document." Click Next to see the attachments screen.
- Enter the PDF document that contains the attachment.
 - Type in the file name of the PDF document containing the attachment you are filing; or click on the Browse button to search your network and select from those files.
 - If your filing has more attachments, first continue labeling this attachment following the instructions below.
- At your option, select a document type and/or enter a description.
 - If you press the down arrow to the right of the Type box, you see a list of available attachment types. Select the one you want by highlighting it.
 - Description: Type a short description of your attachment.
- Add the filename to the list box below.
 - Add the attachment you have entered to this list by clicking the Add to List button. If you have made a mistake, highlight the mistaken attachment and click the Remove from List button.
 - If you have more attachments, go back to Step 1. Continue until all your attachments are on this list. Click Next to continue.

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Does this Refer to an Existing Document

CM/ECF menu / link selections:

Not Applicable (see procedures below)

Procedures, Notes and Tips:

- Check the box if you would like to relate this event to an earlier event in this case. Select category of event. A list of event categories is displayed. Select all [by clicking and dragging] to get the entire Docket. If you do not know the category or select one or more categories from the list by highlighting and clicking "next."

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Notice of Electronic Filing

CM/ECF menu / link selections:

Not Applicable (see procedures below)

Procedures, Notes and Tips:

- The Notice of Electronic Filing is the verification that the filing has been sent electronically to the Court's database. It certifies that this is now an official court document.
- Clicking on the case number hyperlink will present the docket report for this case, after you enter your PACER account information.
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