

***U.S. BANKRUPTCY
COURT
EASTERN DISTRICT OF
TENNESSEE***



***ATTORNEY TRAINING
Case Management/Electronic Case Filing
(CM/ECF)***

Notes

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Welcome to Case Management/Electronic Case Filing (CM/ECF)

Today's course is not intended to be an all-inclusive course for all situations- rather it is designed to present an overview of the system and allow you to become comfortable with CM/ECF.

You are welcome to review and practice sections not covered today using the CM/ECF Training Database from your office or home.

A Court Trainer will conduct today's session with the assistance of one or two Case Administrators. Feel free to ask questions as they arise, although some questions may need to be deferred until after the session due to time constraints. ***(Note: In some cases your screen may differ slightly from some of the illustrations presented here.)***

Accessing CM/ECF (Training) Database

The CM/ECF (training) database can be accessed at the following Web address:

<https://ecf-train.tneb.uscourts.gov/>

CM/ECF works best with Netscape Communicator Version 4.79. See our Web site for more information on Hardware/Software specifications.

Opening a New Bankruptcy Case

NOTE: Many Debtor attorneys use some form of petition software which have ‘Case Upload’ and/or ‘One-touch Case Upload’ capabilities. However, Case Upload software will not work for cases that are deficient (i.e. do not have all required schedules). In the following illustrations, we will show you how to open a new bankruptcy case using CM/ECF directly (which will work in all cases – deficient or not) rather than focusing on any particular petition software. You **MUST** complete these steps completely and in the proper order for your case to function properly.

Opening a new bankruptcy case in CM/ECF is a four-step process consisting of:

1. Adding all parties and uploading the petition
2. Uploading the Creditor Matrix
3. Filing the Statement of Social Security Number(s) (Form B-21)
4. Running the Auto Judge/Trustee Assignment Feature

In the following example, you will be representing the Joint Debtors.

Step 1- Enter Parties and Upload Petition

Using Netscape Navigator 4.79, go to the court's CM/ECF Training Website that can be found at <https://ecf-train.tneb.uscourts.gov/>

CM/ECF login screen

ECF/PACER Login

Notice

This is a **Restricted Web Site** for Official Court Business only. Unauthorized entry is prohibited and subject to prosecution under Title 18 of the U.S. Code. All activities and access attempts are logged.

Instructions

Enter your ECF login and password for electronic filing capabilities. If you do not need filing capabilities, enter your PACER login and password. If you do not have a PACER login, contact the PACER Service Center to establish an account. You may register online at <http://pacer.psc.uscourts.gov> or call the PACER Service Center at (800) 676-6856 or (210) 301-6440.

An access fee of \$.08 per page will be assessed for access to this service. All inquiries will be charged to your PACER login that is kept on file. If you do not need filing capabilities, enter your PACER login and password. The Client code is provided to the PACER user as a means of tracking transactions by client. This code can be up to thirty two alphanumeric characters long.

Authentication	
Login:	<input type="text" value="nahaty"/>
Password:	<input type="password" value="*****"/>
client code:	<input type="text"/>

CM/ECF has been tested and works correctly with Netscape 4.6x, Netscape 4.7x and Internet Explorer 5.5.

Type your login and password. Click 'Login'.

The first screen presented is the main CM/ECF screen. Notice the Blue Bar across the top of the screen. This is the main menu.

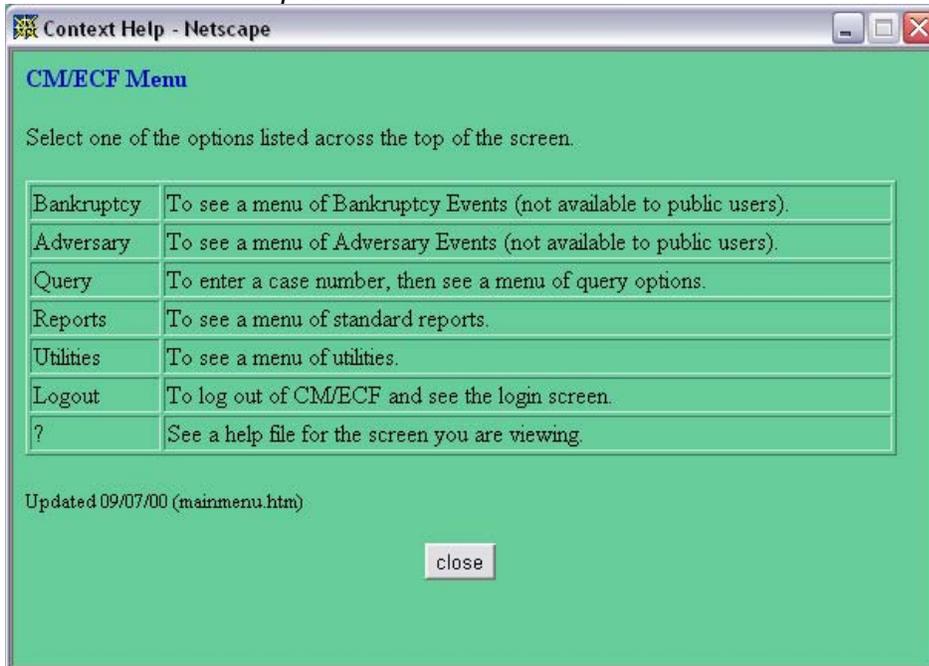
CM/ECF Main Menu Screen



Click the various titles to reveal the options in each category.

Clicking the question mark on the far right of the main menu brings up a “context sensitive” help screen to explain options for that screen.

Context-sensitive Help Screen



Click the question mark while looking at the various screens, then click ‘Bankruptcy’ in the blue menu bar.

Bankruptcy Events Menu

The screenshot shows the ECF website's 'Bankruptcy Events' menu. The menu items are: Answer/Response..., Appeal, Batch Filings, Claim Actions, Motions/Applications/Requests, Notices, Open BK Case, Other, Plan, File Claims, Creditor Maintenance..., Judge/Trustee Assignment, Order Upload, and Case Upload. A callout box on the right explains that the blue underlined words are hyperlinks and provides instructions on how to use them, including a warning about the 'Back' button on Netscape browser.

The blue underlined words at the left are hyperlinks to the various filings/procedures available to attorneys. Clicking a link will begin the process of filing a motion within that category. If you click on a link in error- simply use the "Back" button on Netscape browser to return to the previous screen. (*This works until the pleading has been filed and docket text created.*)

Click 'Open BK Case'.

Open New BK Case Screen

The screenshot shows the 'Open New Bankruptcy Case' screen. It features several dropdown menus: Case type (set to 'bk'), Date filed (1/20/2005), Chapter (set to '7'), Joint Petition (set to 'n'), and Deficiencies (set to 'n'). There are 'Next' and 'Clear' buttons at the bottom left. A callout box on the right explains the purpose of the screen and lists the options for Case Type, Chapter, Joint Petition, and Deficiencies.

This screen allows you to set descriptive criteria for the new case. Options include:
Case Type (BK is the only option)
Chapter (7, 11, 12, or 13)
Joint Petition (Y or N)
Deficiencies (Y or N)

Click the down arrows next to each of the text boxes to see the available settings.

For our training example, we will be filing a Chapter 7-bankruptcy case for joint filers.

Open New BK Case Screen

After ensuring the settings on your screen are the same as shown above, Click 'Next'

The 'Search for a Party' screen appears. You will search the database for parties that may already exist in the system. Before you add a new party to the case, you should search the database to see if this person or business may already exist in the system. This step is important since adding parties multiple times will clog the system with duplicate entries and cause unnecessary data-entry time.

Search Hints

- Enter a limited search string in at least one field of data to search.
- Format Social Security Number or TaxID with hyphens.
- Include punctuation. (Carcia-Carrera)
- Try alternate search terms if your first search is not successful.
- Partial names can be entered.
- Wild cards (*) may be used at the beginning, in the middle or at the end of search strings. (*son, Gr?y, John*)
- The asterisk * can not be used by itself. The system displays the following dialog message "A minimum of two consecutive characters of the last name is required for name search".
- Search fields are not 'case sensitive', (For example, johnston, Johnston, and JOHNSTON) will produce identical results.

Party Search Screen

Type the last name as shown above (note incorrect spelling).
Click 'Search'

Search Results Screen

The search results screen will state 'No person found' (unless a party by the name of 'Andersen' has been added to the system). For our training example, let's assume that no parties were found and broaden our search by entering only a partial name.

Search Results Screen

The screenshot shows the ECF search interface. At the top, there is a navigation bar with 'MECF' logo and links for 'Bankruptcy', 'Adversary', 'Query', 'Reports', 'Utilities', and 'Logout'. Below this, the search form includes fields for 'SSN' and 'Tax Id', and a 'Last/Business name' field containing the text 'And'. There are 'Search' and 'Clear' buttons. The 'Party search results' section displays 'No person found.' and a 'Create new party' button. A callout box with a double-headed arrow pointing to the search field contains the text 'Partial name search'.

Type the partial last name as shown above, and then click 'Search' again.

This time the search produces multiple records.

Search Results Screen

The screenshot shows the ECF search interface with the 'Last/Business name' field containing 'Ander'. The 'Party search results' section now displays a list of names: 'Ander's Lumber Company', 'Andersen, Robert S.', 'Anderson, Debra R.', 'Anderson, Emily', and 'Anderson, Hannah J.'. There are 'Select name from list' and 'Create new party' buttons. A callout box with a double-headed arrow pointing to the results list contains the text 'Search returns: 'Ander's Lumber Company, Andersen, Anderson', etc.'.

Click on any one of the names in the Party Search Results Box.

Person Address Pop-up box

The screenshot shows the ECF website interface. At the top, there is a navigation bar with 'Bankruptcy', 'Adversary', 'Query', 'Reports', 'Utilities', and 'Logout'. Below this is a search section titled 'Search for a party' with input fields for 'SSN', 'Tax Id', and 'Last/Business name'. A 'Search' button and a 'Clear' button are present. To the left, under 'Party search results', a list of names is shown, with 'Anderson, John' selected. A pop-up window titled 'Person Address' is open, displaying the following information: John Anderson, SSN: xxx-xx-5678, 1312 Summer Road, Knoxville, TN 37918, County: Knox. A text box on the right explains that selecting a name creates a pop-up box showing the party's mailing address, which is useful for distinguishing like names. It notes the omission of the first part of the SSN and lists examples like 'Ander's Lumber Company, Andersen, Anderson', etc.

Close the pop-up box after viewing address information. Even though the parties in question may be present in the search results, let's enter them again for practice. Click 'Create New Party'.

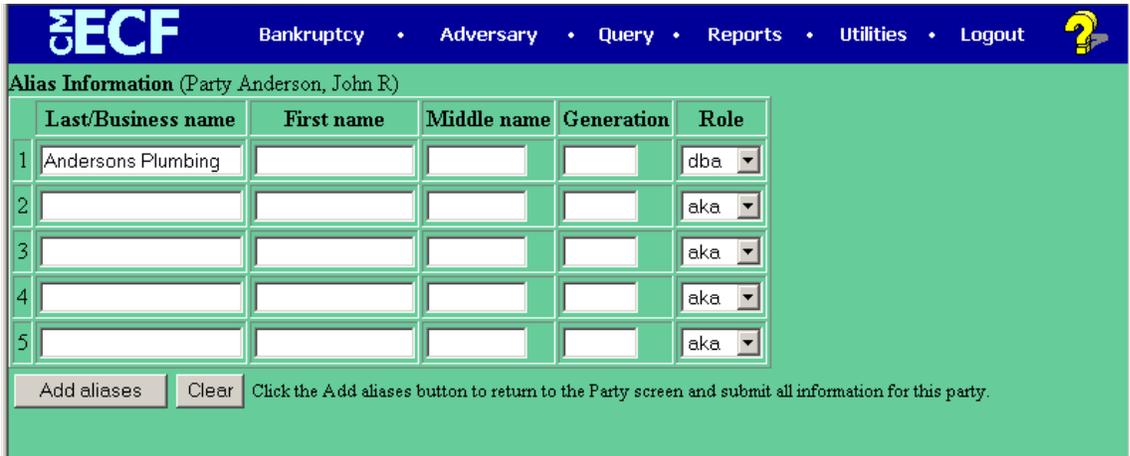
Party Information Screen

The screenshot shows the 'Party Information' screen on the ECF website. The fields are filled with the following information: Last name: Anderson, First name: John, Middle name: R, Generation: (blank), Title: (blank), SSN: 111-11-1111, Tax ID: (blank), Office: (blank), Address 1: 1313 Mockingbird Ln., Address 2: (blank), Address 3: (blank), City: Knoxville, State: TN, County: Knox, Country: (blank), Phone: (blank), Fax: (blank), E-mail: (blank), ProSe: no, Role: Debtor (db:pty). A text box on the right instructs the user to select a role type by clicking the arrow for the drop-down list to view all available options. A 'Party text' field is present at the bottom, with a note to 'Leave Blank'. At the bottom left, there are buttons for 'Alias...', 'Review...', 'Submit', 'Cancel', and 'Clear'. A note below the buttons says 'Add all aliases before clicking the Submit button.'

Enter the Debtor information into the Party Information screen as shown above. (Note: **ALWAYS** leave the party text blank.)

The Debtor has a plumbing business, so we will need to add an alias for him. Click the 'Alias' button now.

Alias Information Screen

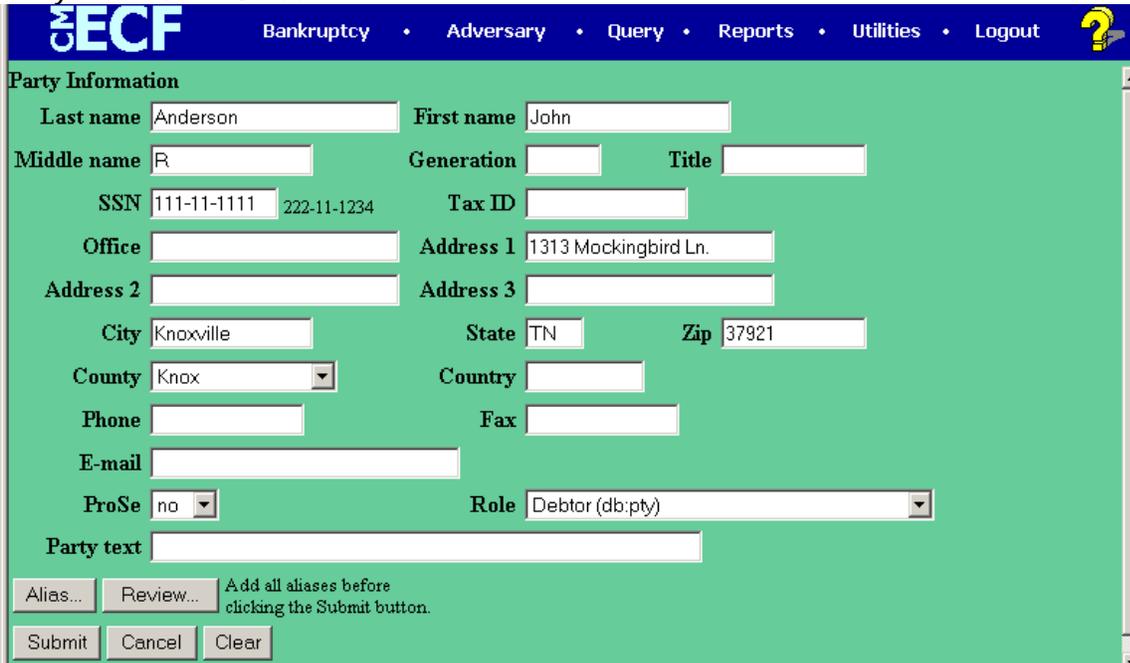


	Last/Business name	First name	Middle name	Generation	Role
1	Andersons Plumbing				dba
2					aka
3					aka
4					aka
5					aka

Add aliases Clear Click the Add aliases button to return to the Party screen and submit all information for this party.

Enter the business name and Role as shown above, then click the 'Add aliases' button. At this point you can review the case information or submit the party to the case. Click 'Add Aliases'.

Party Information Screen



Party Information

Last name Anderson First name John

Middle name R Generation Title

SSN 111-11-1111 222-11-1234 Tax ID

Office Address 1 1313 Mockingbird Ln.

Address 2 Address 3

City Knoxville State TN Zip 37921

County Knox Country

Phone Fax

E-mail

ProSe no Role Debtor (db;pty)

Party text

Alias... Review... Add all aliases before clicking the Submit button.

Submit Cancel Clear

Click 'Submit'.

Divisional Office Selection Screen

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

Open New Bankruptcy Case

Please select the location where the 341 meeting of creditors is to be scheduled.
Note: In all Northeastern Division chapter 13, 12, and 11 cases, the meeting of creditors must be scheduled in the Greenville location

Knoxville

Next Clear

Look at and select the appropriate location from the available options in the drop-down box. Click 'Next'.

Party Search Screen

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

Open New Bankruptcy Case

Search for a party(joint debtor)

SSN Tax Id

Last/Business name

Search Clear

End party selection

Enter a partial last name in the Last/Business name box as shown above and click 'Search'.

Although the Joint Debtor may also appear in the search results box, let's add the joint debtor's information as well.

Search Results Screen

Bankruptcy • Adversary • Query • Reports • Utilities • Logout

Search for a party(joint debtor)

SSN Tax Id

Last/Business name

Search Clear

Party search results

- Anderson, Jane
- Anderson, Jennifer L.
- Anderson, Jessica T.
- Anderson, John
- Anderson, John R.
- Anderson, Joshua A.

Copy previous party's address

Select name from list Create new party

The Joint Debtor's address will be automatically copied from the Debtor's record. Uncheck this box if this is not accurate.

Click 'Create New Party'.

Party Information Screen

Bankruptcy • Adversary • Query • Reports • Utilities • Logout

Party Information

Last name Anderson First name Jane

Middle name Generation Title

SSN 111-22-1111 222-11-1234 Tax ID

Office Address 1 1313 Mockingbird Ln.

Address 2 Address 3

City Knoxville State TN Zip 37921

County Knox Country

Phone Fax

E-mail

ProSe no Role Joint Debtor (jdb.pty)

Party text

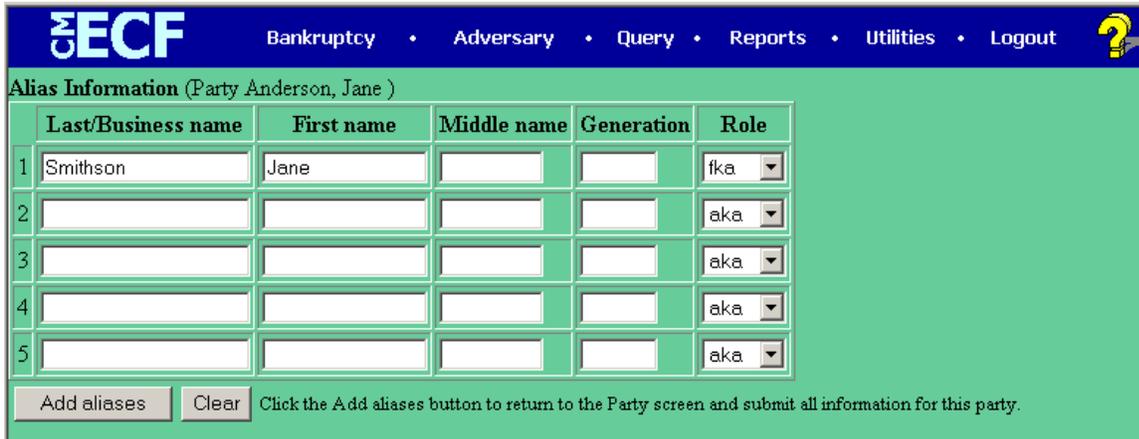
Alias... Review... Add all aliases before clicking the Submit button.

Submit Cancel Clear

Be sure to select a role type. Click the arrow for the drop down list to view all available options.

To add joint debtor's maiden name, Click 'Alias'.

Alias Information Screen



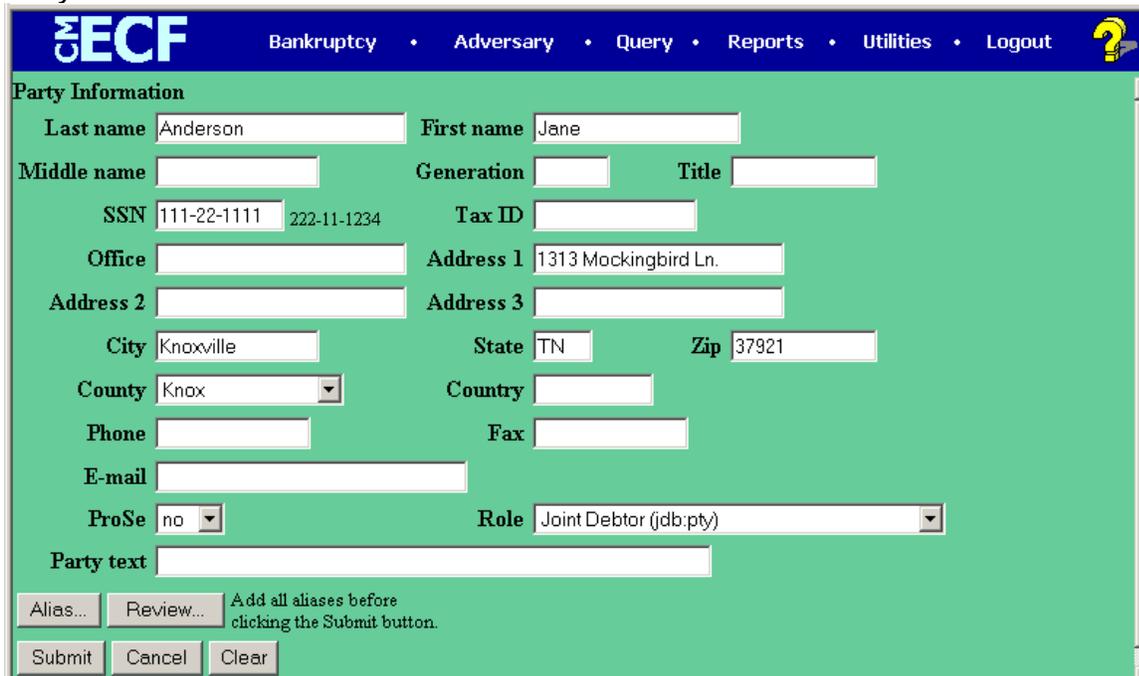
	Last/Business name	First name	Middle name	Generation	Role
1	Smithson	Jane			fka
2					aka
3					aka
4					aka
5					aka

Click the Add aliases button to return to the Party screen and submit all information for this party.

Add alias name as an 'fka', then click the 'Add aliases' button.

You will be returned to the Party Information Screen where you can review Joint Debtor information prior to submitting.

Party Information Screen



Party Information
 Last name: Anderson First name: Jane
 Middle name: Generation: Title:
 SSN: 111-22-1111 222-11-1234 Tax ID:
 Office: Address 1: 1313 Mockingbird Ln.
 Address 2: Address 3:
 City: Knoxville State: TN Zip: 37921
 County: Knox Country:
 Phone: Fax:
 E-mail:
 ProSe: no Role: Joint Debtor (jdb:pty)
 Party text:

 Add all aliases before clicking the Submit button.

Click 'Review'.

Party Review Screen

After verifying that all information is correct- Click 'Return to Party screen'

Bottom of Party Information Screen

Leave the 'Party Text' blank and Click 'Submit'

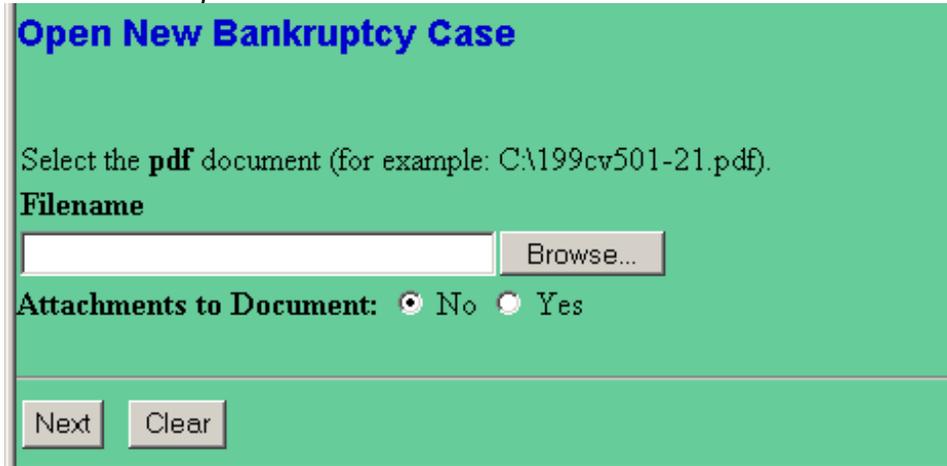
Open New Bankruptcy Case Screen (Details)

Explore the drop-down menus and leave the default settings as shown above. Then click next.

(Note: **ALWAYS** select 'No' for Asset Notice in chapter 7 cases).

The following screen is used to ‘upload’ files, forms, motions, and pleadings into the new case. These files should be ready to upload from your attorney folder on your computer’s ‘Desktop’.

CM/ECF File Upload Screen

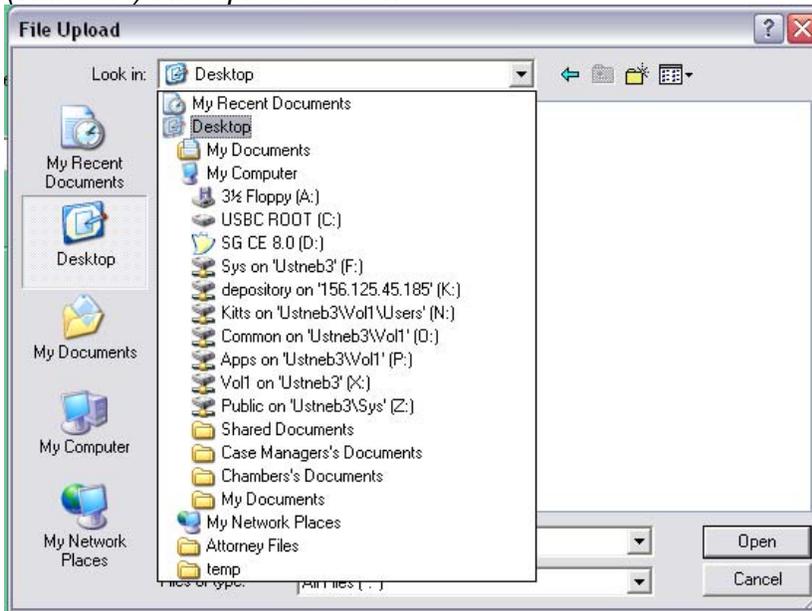


Click ‘Browse’

The (Windows) “File Upload” screen appears. **Click the down arrow** at the right side of the “Look in:” box to open the storage locations for this computer.

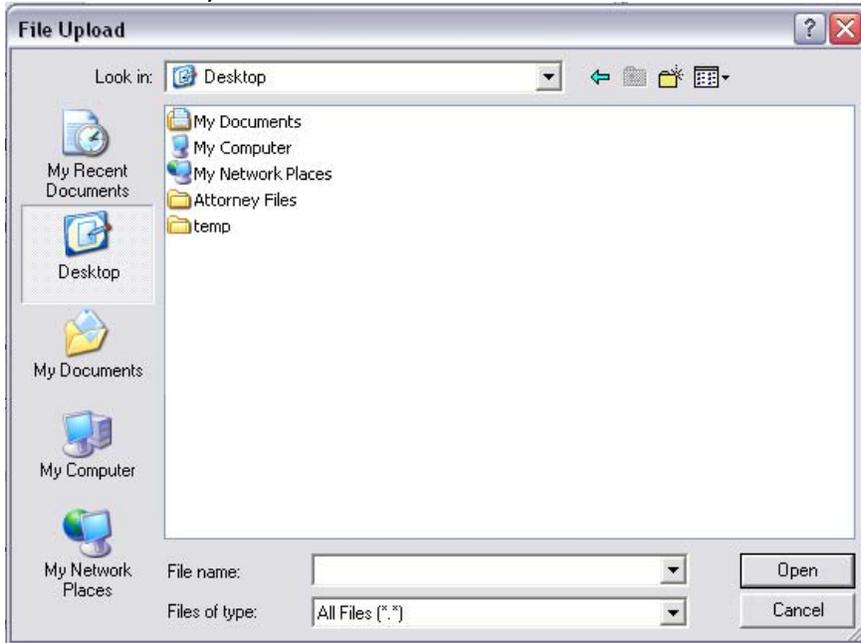
Practice files have been created for class use. You will need to create these files on your own when actually filing from your office.

(Windows) File Upload Screen



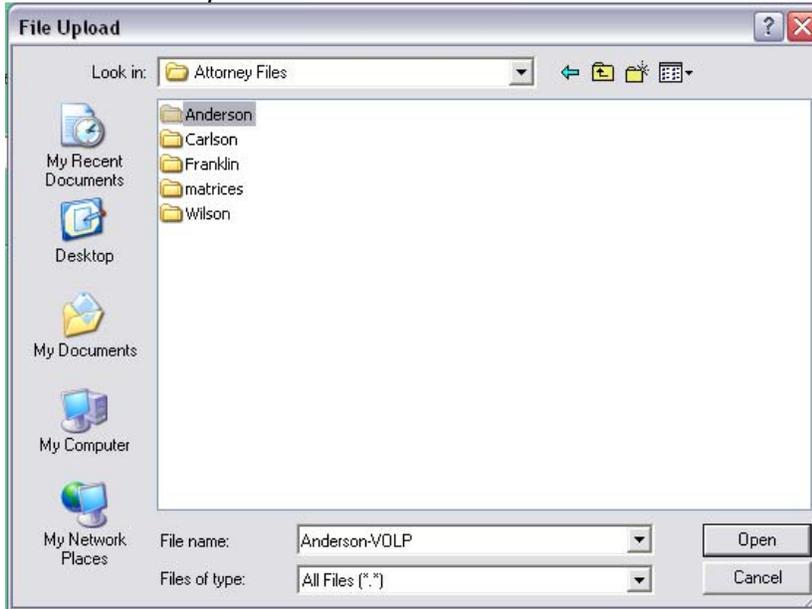
**Click the down arrow next to the “Look in” box.
Double-Click ‘Desktop’ in the contents window beneath ‘Look in’**

Windows File Upload Screen



Double Click 'Attorney Files' subfolder

Windows File Upload Screen

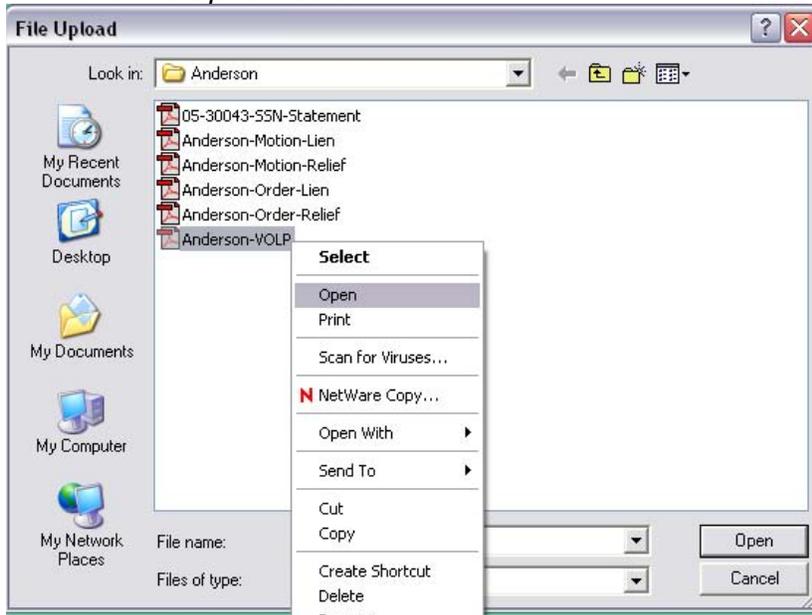


Double-Click 'Anderson' subfolder

NOTE:

CM/ECF uses 'Portable Document Format (pdf)' for electronic filing of all case pleadings (with the exception of the 'Creditor Matrix', which uses a text file ('.txt')). Netscape will always search for .html file types. Therefore, you will always need to change the "Files of Type" to "All Files (*.*)" as shown above.

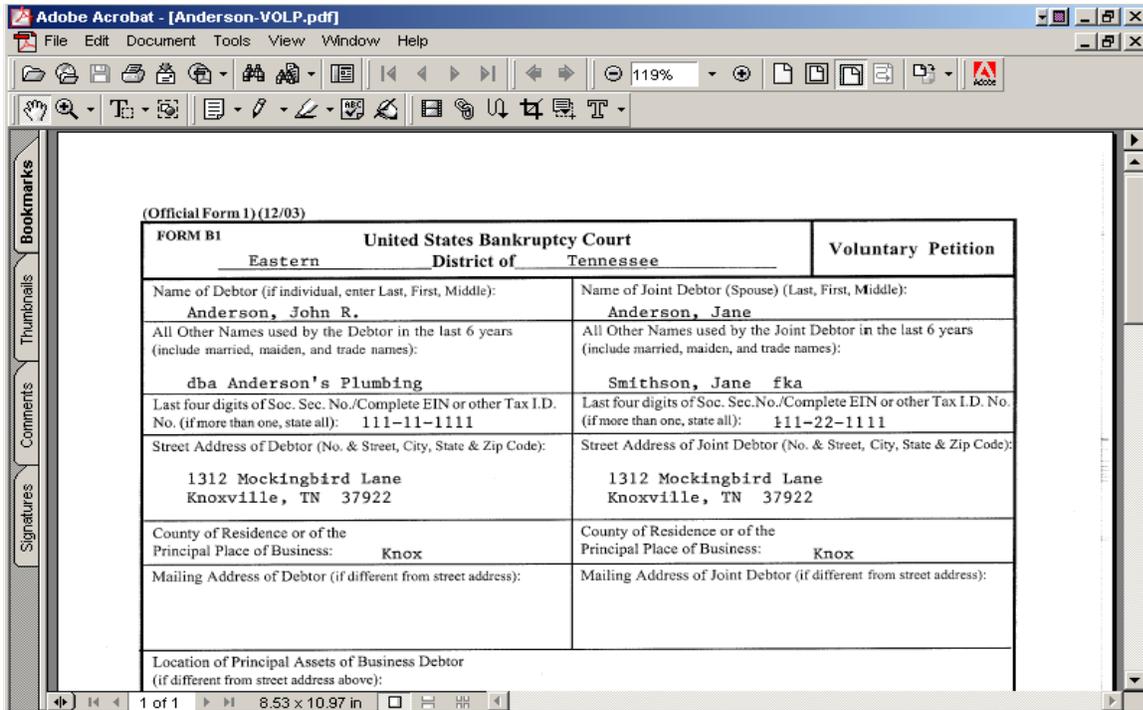
Windows File Upload Screen



Right-Click the desired file and select 'Open' from the context menu

IMPORTANT: This step opens Adobe Acrobat and allows you to preview the file you are about to upload. This is a crucial step since uploading the wrong file to a case becomes public record, is irreversibly broadcast to all concerned parties, and is very difficult to amend.

Adobe Acrobat Preview



Scroll down the pages to make sure this is the correct document and that it is legible. Close or minimize Adobe Acrobat after previewing the document.

After previewing the petition, you can close Adobe Acrobat, which will return you to the File Upload screen. (You can also close only the current file by clicking the lower 'X' and then minimizing Adobe Acrobat. This is helpful if you will be performing multiple projects in CM/ECF and uploading additional documents.)

(Windows) File Upload Screen



Click 'Open'.

Open New Bankruptcy Case (PDF Upload)

Bankruptcy • Adversary • Query • Reports • Utilities • Logout

Open New Bankruptcy Case

Select the pdf document (for example: C:\199cv501-21.pdf).

Filename

ey Files\Anderson\Anderson-VOLP.pdf

Attachments to Document: No Yes

Click 'Next'.

Fee Amount Screen

Bankruptcy • Adversary • Query • Reports • Utilities • Logout

Open New Bankruptcy Case

All Petitions paid in Installments *must be accompanied by an Application to Pay Filing Fees in Installments.*

Enter the amount paid in the fee box or enter 0.00 if nothing paid at this time.

Fee: \$209

Click 'Next'.

A screen appears that was designed to allow for additions to docket text.

Do not edit docket text.

Edit docket text screen (do not use)

Bankruptcy • Adversary • Query • Reports • Utilities • Logout

Open New Bankruptcy Case

Docket Text: Modify as Appropriate.

Chapter 7 Voluntary Petition . Fee Amount \$209 Filed by nahaty on behalf of John R Anderson , Jane Anderson . (nahaty,)

Click 'Next'.

IMPORTANT: The following screen (shown below) is the last screen before our case becomes a new filing. It is imperative that the information provided to this point be accurate and correct. If it is not you can correct the filing easily by clicking the Back Arrow on your browser to return to previous steps (or click 'Bankruptcy' to wipe clean all steps to this point). This is a crucial step since docketing the wrong event to a case becomes public record, is irreversibly broadcast to all concerned parties, and is very difficult to amend.

Final Docket Text Screen

Click 'Next'.

The Internet Credit Card Payment screen appears asking whether you would like to 'Pay Now' or 'Continue Filing'. If you will be filing other pleadings in CM/ECF at this time, you may click 'Continue Filing'. Each time you file a pleading, you will see this screen again with a list of accumulated fees. Some attorneys choose to pay once at the end of the day as opposed to each time a filing fee is charged.

Internet Credit Card Payment Screen

Date Incurred	Description	Amount
2005-01-20 15:55:00	Voluntary Petition (Chapter 7)(3:05-bk-30044) [misc,volp7] (209.00)	\$ 209.00
		Total: \$ 209.00

Click 'Pay Now'.

NOTE: You may want to view the “Notices & Agreement” hyperlink as it sets out Pay.gov’s general legal, privacy, and accessibility notices.

Payment Information Screen

Enter Payment Information

Cardholder Name:	<input type="text" value="nahaty"/> *	Plastic Card Payment Steps 1. Select Payment Type 2. Enter Payment Information 3. Authorize Payment / Payment Summary 4. Payment Confirmation
Address:	<input type="text" value="123 Street"/> *	
Address 2:	<input type="text"/>	
City:	<input type="text"/>	
<input checked="" type="radio"/> State: <input type="text"/>	<input type="radio"/> Province / Region / County:	
Country:	<input type="text"/>	
(Instead of state, if necessary)		
Zip Code:	<input type="text" value="37902"/>	
Card Type:	<input type="text" value="Visa"/> *	
Card Number:	<input type="text"/> *	
Security Code:	<input type="text"/>	
Expiration Date:	<input type="text"/> / <input type="text"/> *	
Payment Amount:	<input type="text" value="\$209.00"/> *	
A card authorization must be received before midnight Eastern Time if payment is to occur as early as the next day. If the U.S. Treasury Department's designated depository is closed on a scheduled payment date (including weekends and some holidays), the payment will occur the next day the depository is open.		
<input type="button" value="Continue"/> <input type="button" value="Quit"/>		

Each box with an asterisk next to it is a required box and must be completed. The training credit card number is 4111111111111111. You can use future expiration date, such as February 2006.

Click 'Continue'.

Payment Summary and Authorization Screen

Payment Summary and Authorization

<p>Cardholder Name: nahaty Address: 123 Street Address 2: City: State: Country: Zip Code: 37902 Card Type: Visa Card Number: *****1111 Expiration Date: 12 / 2008 Payment Amount: \$209.00 Current Date and Time: 01/20/2005 04:13 PM</p>	<p>Plastic Card Payment Steps</p> <ol style="list-style-type: none"> 1. Select Payment Type 2. Enter Payment Information 3. Authorize Payment / Payment Summary 4. Payment Confirmation
<p>Authorization*</p> <p><input type="checkbox"/> I authorize a charge to my card account for the above amount in accordance with my card issuer agreement.</p>	
<p>Confirmation Receipt Request</p> <p>To have a confirmation email sent to you upon completion of this transaction, provide an email address and confirmation below.</p> <p>Email Address: <input type="text"/></p> <p>Re-enter Email Address to Confirm: <input type="text"/></p>	
<p><input type="button" value="Make Payment"/> <input type="button" value="Edit"/> <input type="button" value="Cancel"/></p> <p>Press the "Make Payment" button only once. Pressing this button more than once could result in multiple transactions.</p>	

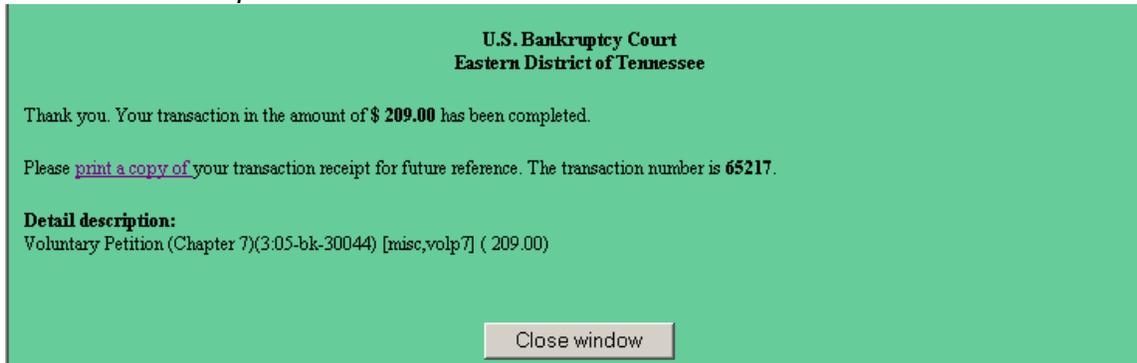
IMPORTANT: You must check the box under Authorization. Failure to check the box will result in the payment not being processed.

Also, you have the option of having a Confirmation Report emailed to you after the transaction is complete. You **MUST** enter your email address in both the text boxes to receive a confirmation report.

Click 'Make Payment'.

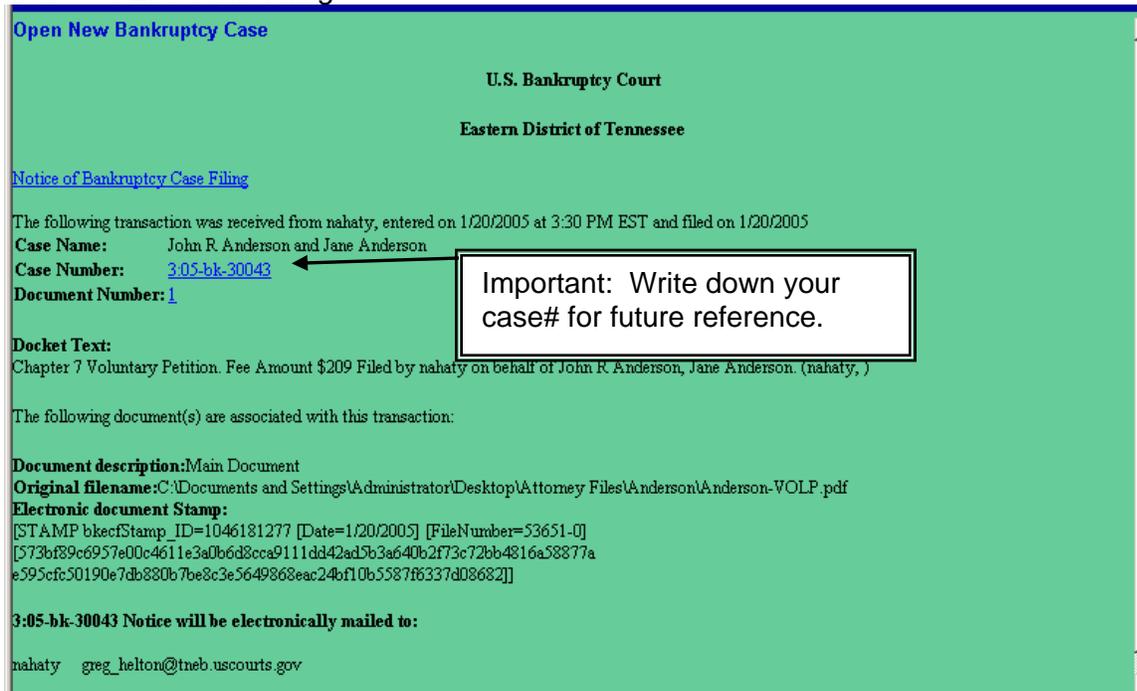
The screen below shows you that the transaction has been processed. You may want to save, print the screen (“CTRL+P”), or otherwise keep record of the receipt number and amount.

Credit Card Receipt Screen



Click ‘Close Window’.

Notice of Electronic Filing



Save or Print this screen as desired for your own records.

This **Notice of Electronic Filing** is the verification that the filing has been sent electronically to the court's database and has been filed with the court. Make a note of the case number, which appears as a blue hyperlink. *(Please refer to the handout for details on the new case number format)*

Clicking on any of the blue-underlined hyperlinks will take you to the PACER login screen. After login, reports for this case will be available.

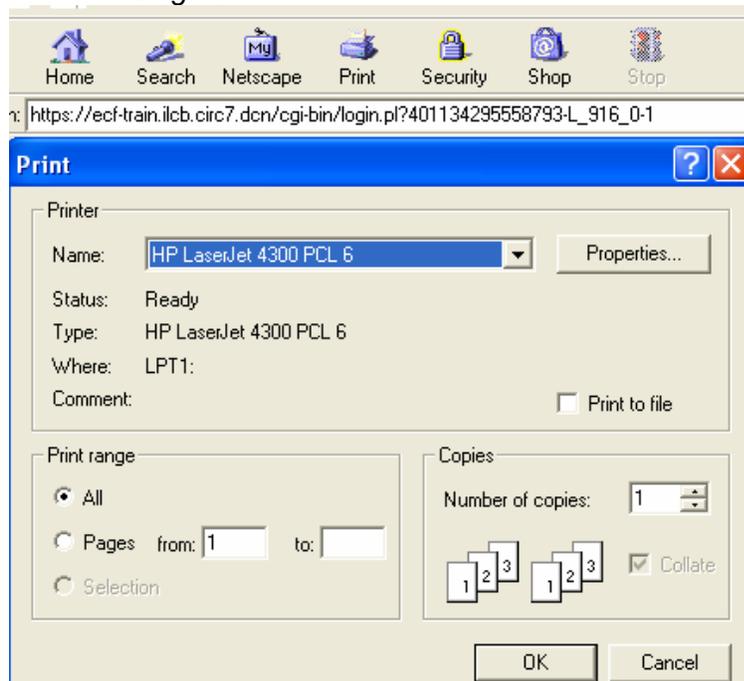
(We will look at Reports and Queries later in today's session. Do not access this feature via PACER at this time.)

Most Attorney-filers will want to print or save the Notice of Electronic Filing document to avoid PACER charges later. (This is also true of the emailed notifications sent to attorneys on cases in which they have an interest.)

To print the Notice of Electronic Filing;

Click the Print Icon at the top of the Netscape browser window.

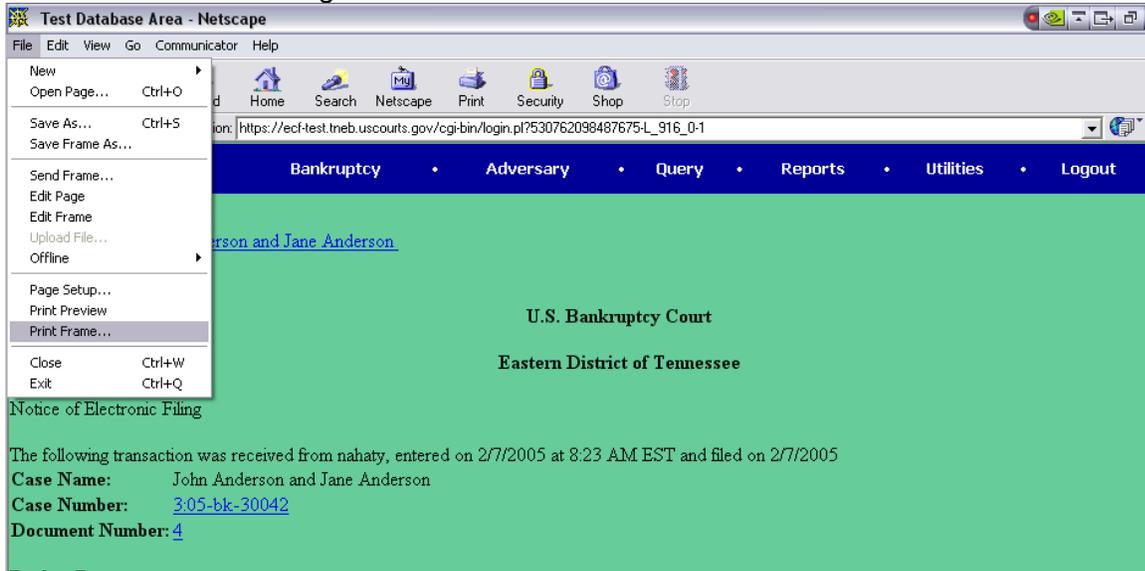
Printer Dialog Box



Click 'OK' to print using the default printer setting (or make adjustments as desired).

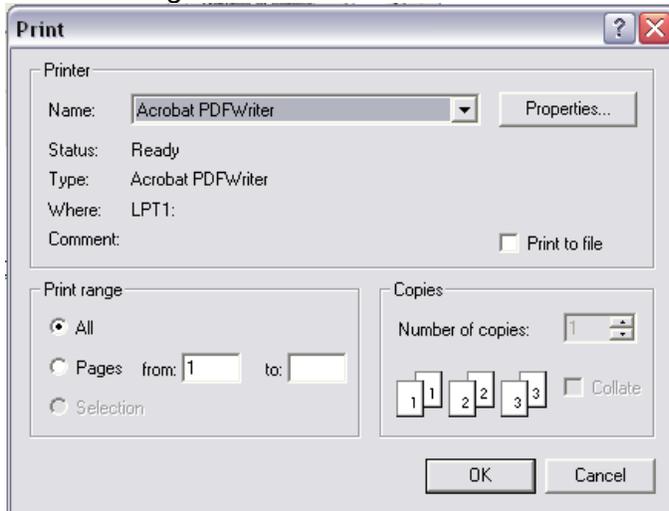
To 'save' the Notice of Electronic Filing as a PDF using Adobe PDF Writer, follow these instructions.

Notice of Electronic Filing



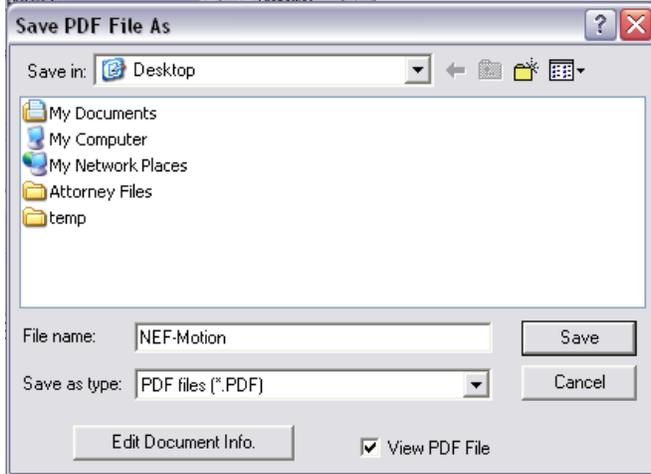
Click 'File', then 'Print Frame' on the main menu in Netscape Navigator 4.79.

Printer Dialog Box



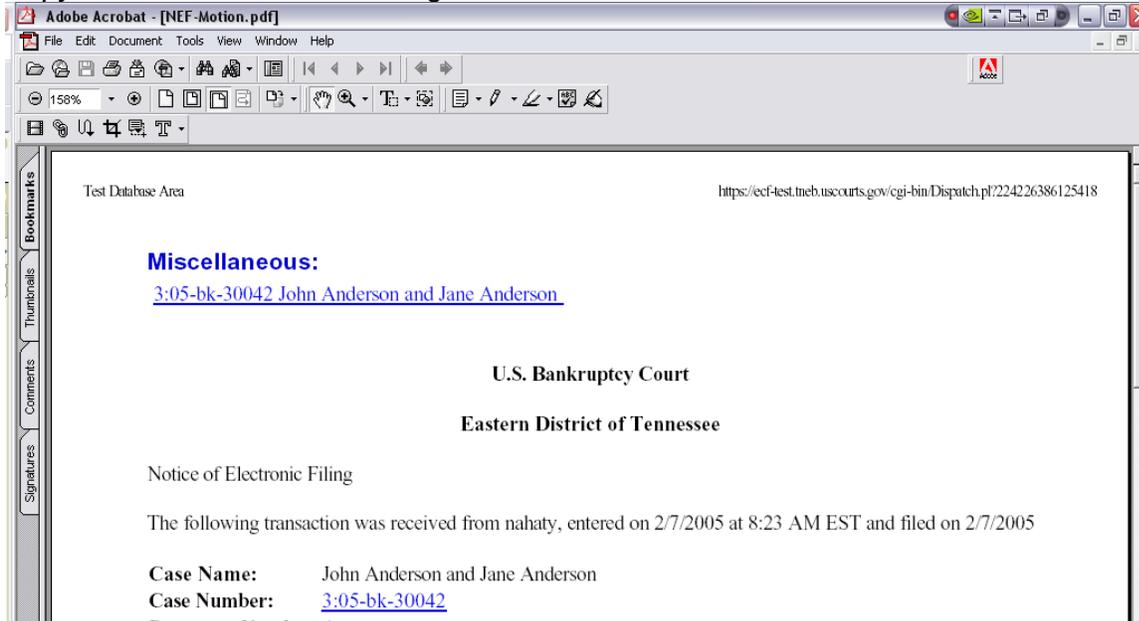
Select the Adobe PDF Writer as the printer to use and Click 'OK'.

PDF Printer Settings Screen

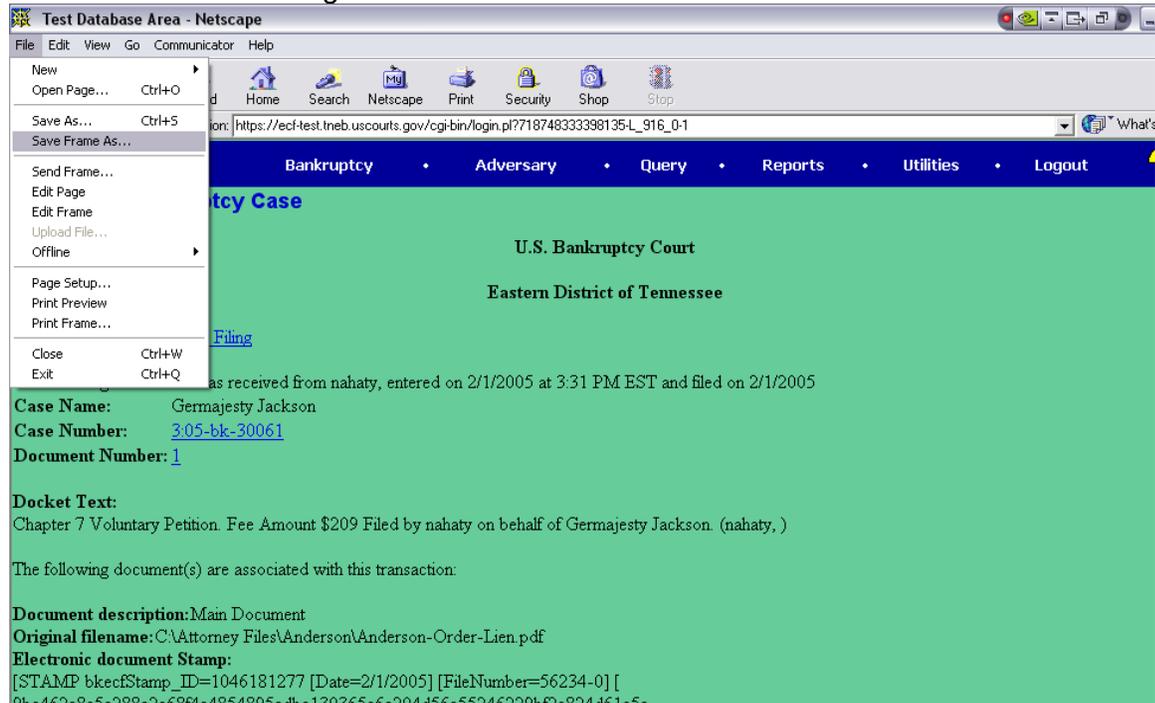


Here you will name your file, select the location it is to be stored in, and select whether or not to view the file after it is created. Click 'Save'.

Copy of Notice of Electronic Filing in PDF Format



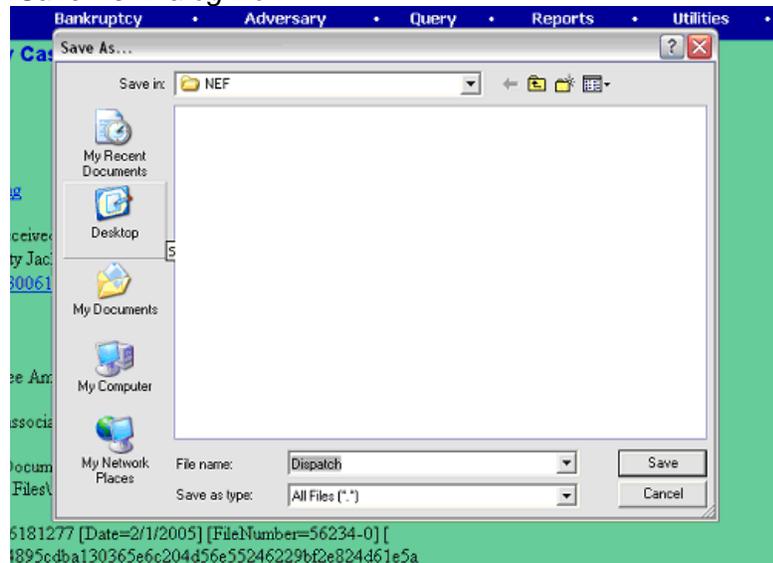
Notice of Electronic Filing



To save an electronic version of the Notice of Electronic Filing, click 'File', then 'Save Frame As', select a storage location, and a name for the file.

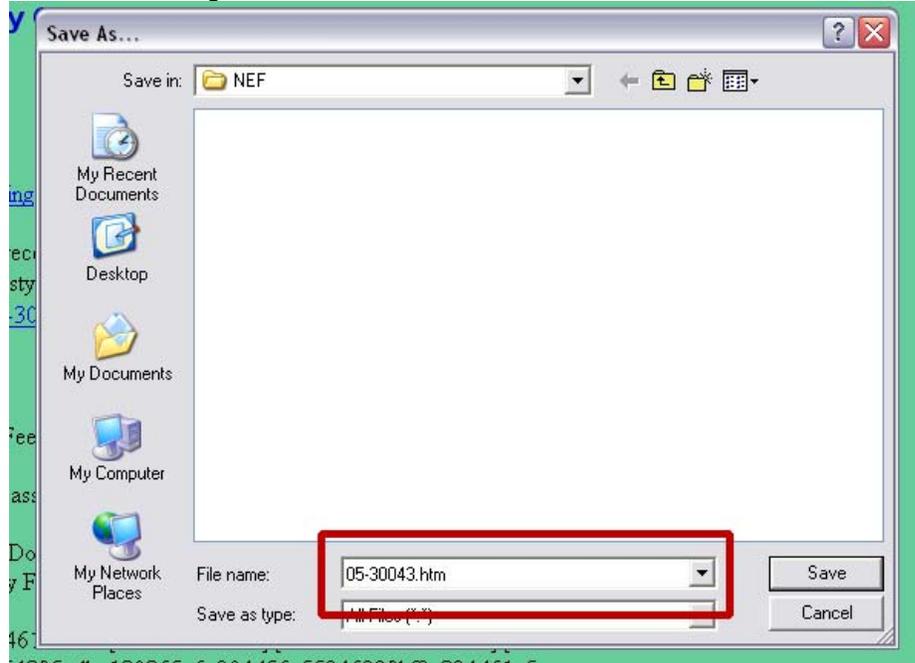
The default name is 'Dispatch.pl', this name will not allow you to view the file easily from Windows. You must add a file extension of '.doc' or '.htm' to be able to easily view the file later.

'Save As' Dialog Box



This example uses “htm” as the file extension. This file will open in Internet Explorer automatically.

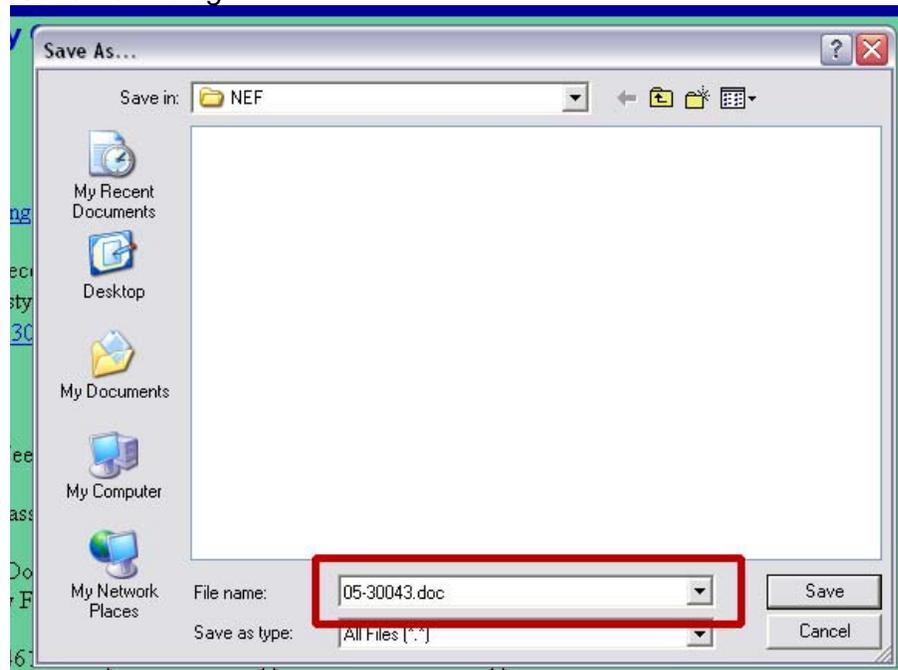
‘Save As’ Dialog Box



Edit the filename and add ‘.htm’, then Click ‘Save’.

This example uses “doc”. This file will open with Microsoft Word automatically.

‘Save As’ Dialog Box



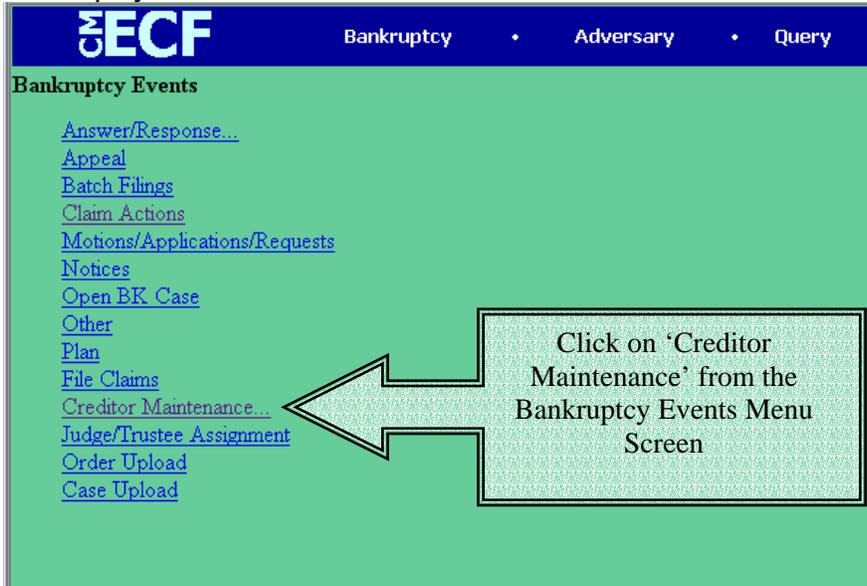
Edit the filename and add ‘.doc’, then Click ‘Save’.

Step 2- Uploading the Creditor Matrix

After entering the party information for John & Jane Anderson and associating the correct petition form, we will upload the Creditor Matrix file.

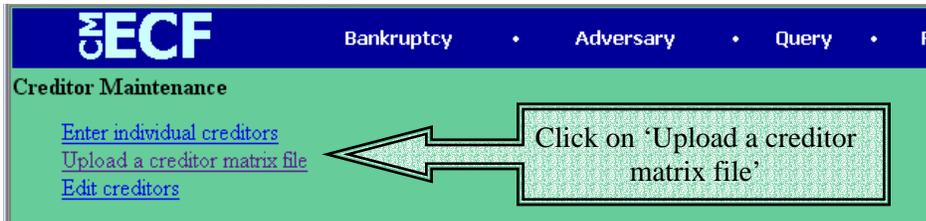
Click 'Bankruptcy' on the blue menu bar to proceed with the next step.

Bankruptcy Events Screen



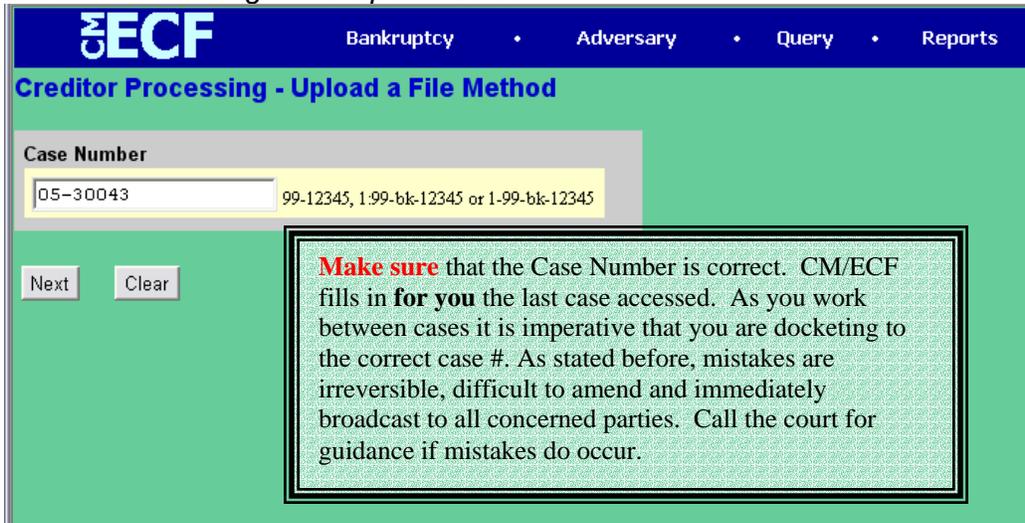
Click the 'Creditor Maintenance' link.

Creditor Maintenance Menu



Click on 'Upload a creditor matrix file'.

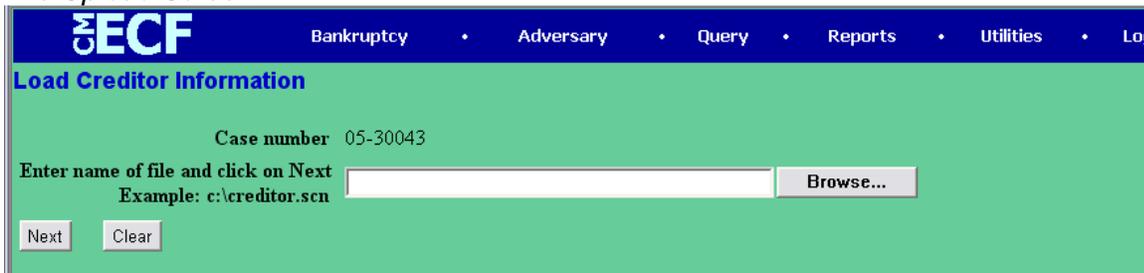
Creditor Processing – File Upload Screen



Verify Case Number, then click 'Next'.

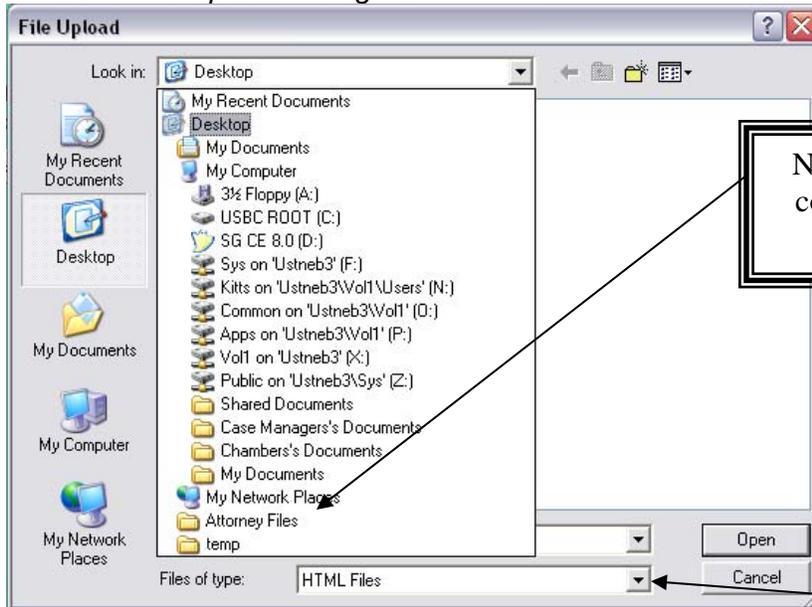
The 'File Upload' screen appears again. You will see this screen many times while working with CM/ECF.

File Upload Screen



Click the 'Browse' button.

Windows File Upload Dialog Box

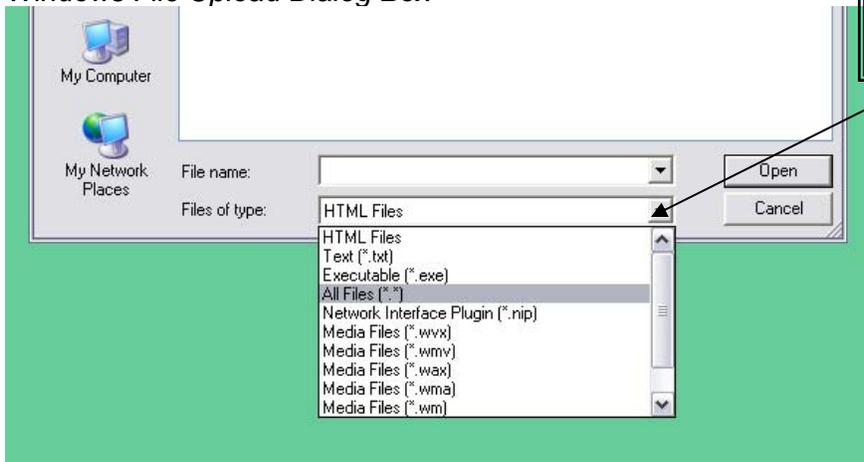


Navigate to the correct storage location.

Locate correct storage location.

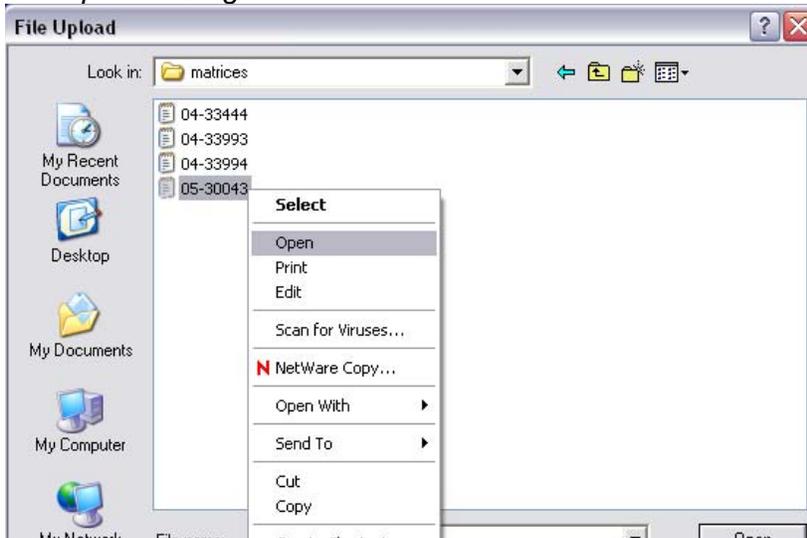
Be sure to change the 'Files of type' setting to 'All Files' (not HTML) (Otherwise the folder may appear empty)

Windows File Upload Dialog Box



Change 'Files of type' to 'All Files (*.*)' or 'Text (*.txt)'.

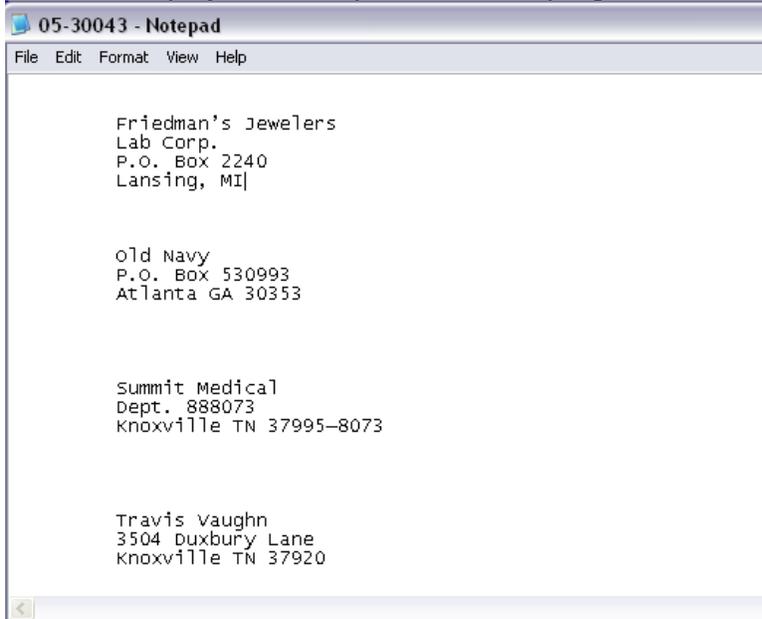
File Upload dialog box



Right-click the file name and choose 'Open' from the shortcut menu that appears.

Preview the list of creditors to make sure this is the correct file before uploading it into the system. (*Once added to the case, this is impossible to reverse and difficult to amend.*)

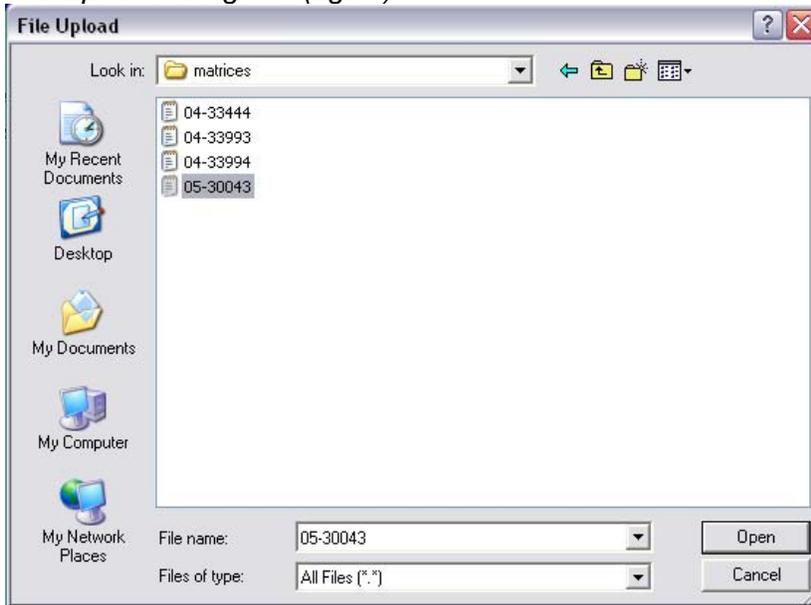
Creditors displayed in Notepad text editor program



After previewing the Creditor Matrix file, close Notepad.

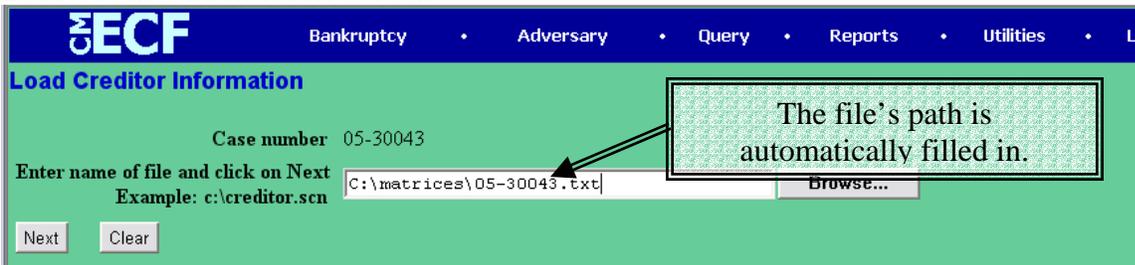
NOTE: Please visit the court's website for information regarding the required formatting for the creditor matrix. <http://www.tneb.uscourts.gov>

File Upload dialog box (again)



Click 'Open'.

Load Creditor Information Screen



Click 'Next'.

Number of Creditors Uploaded



Click 'Submit'.

Creditors Receipt Screen

The screenshot shows the ECF (Electronic Case Filing) interface. At the top, there is a dark blue header with the ECF logo on the left and navigation links for 'Bankruptcy', 'Adversary', 'Query', and 'Rep' on the right. Below the header, the page title 'Creditors Receipt' is displayed in a green bar. The main content area is white and contains a table with two rows of data. Below the table, there are two blue hyperlinks: 'File A Proof Of Claim' and 'Return To Creditor Maintenance Menu'.

Case Number	05-30043
Total Creditors Added to Database	14

[File A Proof Of Claim](#)

[Return To Creditor Maintenance Menu](#)

Return to the 'Bankruptcy Events' screen by clicking on 'Bankruptcy' in main menu.

Step 3- Filing the Statement of Social Security Number(s) (Form B-21)

Bankruptcy Events Screen

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout

Bankruptcy Events

- [Answer/Response...](#)
- [Appeal](#)
- [Batch Filings](#)
- [Claim Actions](#)
- [Motions/Applications/Requests](#)
- [Notices](#)
- [Open BK Case](#)
- [Other](#)
- [Plan](#)
- [File Claims](#)
- [Creditor Maintenance...](#)
- [Judge/Trustee Assignment](#)
- [Order Upload](#)
- [Case Upload](#)

Click 'Other'.

Case number entry screen

ECF Bankruptcy • Adversary • Query • Reports

Miscellaneous

Case Number

99-12345, 1-99-bk-12345 or 1-99-bk-12345

To enter (or verify) the correct case number, Click 'Next'.

Miscellaneous Events Selection Box

ECF Bankruptcy • Adversary • Query •

Miscellaneous

[3:05-bk-30043 John R. Anderson and Jane Anderson](#)

SSN Certification
Schedule A
Schedule B
Schedule C
Schedule D
Schedule E
Schedule F
Schedule G

Next Clear

Select 'SSN Certification' from list.

Joint Attorney Option

ECF Bankruptcy • Adversary • Query •

Miscellaneous:

[3:05-bk-30043 John R. Anderson and Jane Anderson](#)

Joint filing with other attorney(s):

Next Clear

Leave the Option to file jointly with another attorney blank.
Click 'Next'.

Party Selection Box

The screenshot shows the ECF (Electronic Case Filing) interface. At the top, there is a blue header with the ECF logo and navigation links for 'Bankruptcy', 'Adversary', and 'Query'. Below the header, the page title is 'Miscellaneous:' followed by a link to '3:05-bk-30043 John R. Anderson and Jane Anderson'. The main content area is green and contains the heading 'Select the Party:'. Below this heading is a scrollable list box containing two entries: 'Anderson, Jane [Joint Debtor]' and 'Anderson, John R [Debtor]'. To the right of the list box is a link that says 'Add/Create New Party'. At the bottom of the green area are two buttons: 'Next' and 'Clear'.

Select the parties filing the Statement of SSN (form B-21).

NOTE: To select multiple parties from the list, hold the 'Ctrl' key down while clicking on each party name.

CM/ECF File Upload screen

The screenshot shows the ECF File Upload screen. It has the same blue header as the previous screen. Below the header, the page title is 'Miscellaneous:' followed by a link to '3:05-bk-30043 John R. Anderson and Jane Anderson'. The main content area is green and contains the instruction 'Select the pdf document (for example: C:\199cv501-21.pdf)'. Below this instruction is a label 'Filename' followed by a text input field and a 'Browse...' button. Underneath the input field is the text 'Attachments to Document:' followed by two radio buttons: 'No' (which is selected) and 'Yes'. At the bottom of the green area are two buttons: 'Next' and 'Clear'.

Click 'Browse'.

The steps for uploading the Statement of SSN (form B-21) PDF document follow the same procedures as for any PDF document, see page 18 for detailed instructions.

CM/ECF File Upload Screen

ECF Bankruptcy • Adversary • Query •

Miscellaneous:
[3:05-bk-30043 John R Anderson and Jane Anderson](#)

Select the **pdf** document (for example: CA199cv501-21.pdf).

Filename
C:\Anderson\05-30043-SSN-Statement.

Attachments to Document: No Yes

When the path to the file on your computer is filled into the 'Browse' box, Click 'Next'.

Case Name Screen

ECF Bankruptcy • Adversary • Query • Reports •

Miscellaneous:
[3:05-bk-30043 John R Anderson and Jane Anderson](#)

Click 'Next'.

Final Review Screen

ECF Bankruptcy • Adversary • Query • Reports • Utilities •

Miscellaneous:
[3:05-bk-30043 John R Anderson and Jane Anderson](#)

Docket Text: Final Text
SSN Certification Filed by nahaty on behalf of Joint Debtor Jane Anderson, Debtor John R Anderson. (nahaty,)

Attention!! Submitting this screen commits this transaction. You will have no further opportunity to modify this submission if you continue.

This is your **LAST CHANCE** to verify the docket text. Use the 'Back' button to review settings if necessary or click 'Bankruptcy' and start over. Click 'Next'.

Notice of Electronic Filing

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

Miscellaneous:
[3:05-bk-30043 John R. Anderson and Jane Anderson](#)

U.S. Bankruptcy Court
Eastern District of Tennessee

Notice of Electronic Filing

The following transaction was received from nahaty, entered on 1/21/2005 at 10:34 AM EST and filed on 1/21/2005

Case Name: John R. Anderson and Jane Anderson
Case Number: [3:05-bk-30043](#)
Document Number: [5](#)

Docket Text:
SSN Certification Filed by nahaty on behalf of Joint Debtor Jane Anderson, Debtor John R. Anderson. (nahaty,)

The following document(s) are associated with this transaction:

Document description: Main Document
Original filename: C:\Documents and Settings\Kristopher Kitts\Desktop\Attorney Files\Anderson\05-30043-SSN-Statement.pdf
Electronic document Stamp:
[STAMP bkecfStamp_ID=1046181277 [Date=1/21/2005] [FileNumber=53859-0] [7f9ef983178698fa04c1ee1c35fad5ecf3349bf3bf7e9ea0ee3d6585d966af180acb a6e6b74a0c9ff5234d2bc2aa157e227e1b38f7dca828a37a43ec0eb2f7a]]

You may want to print or save the Notice of Electronic filing for your records (as discussed in previous segments).

Step 4- Running the Automatic Judge/Trustee Assignment

The ‘Judge/Trustee Assignment’ (JTA) is a feature that will assign the Judge & Trustee to the case(s) just opened. See the chart below for how this feature will work for each chapter.

	Assign Trustee	Assign Judge	341 Meeting
Chapter 7	YES	YES	YES
Chapter 13	YES	YES	TRUSTEE
Chapter 11	NO	YES	U.S. TRUSTEE
Chapter 12	YES	YES	TRUSTEE

If you are opening multiple chapter 7 cases, it is advisable to run this feature only once at the end of all your case openings. This will help ensure, but does not guarantee, that your chapter 7 cases will have 341 meetings in the same time frame.

IMPORTANT: It is critical that you run JTA at the end of your case openings. If you fail to run JTA, you cannot upload an order through E-Orders or service any pleading to the case trustee. This should be run before any other action in the case is performed.

Click **Bankruptcy** on the main menu bar.

Bankruptcy Events Screen



Click ‘**Judge/Trustee Assignment**’

The resulting screen shows the 341 meeting details.

The screenshot shows the CM/ECF interface with a dark blue header containing the logo and navigation links: Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. A yellow question mark icon is on the right. Below the header, a green message box states: "This may take a few minutes...Please be patient. A confirmation screen will appear." The main content area is titled "341 Judge And Trustee" and contains a table with the following data:

Case	Case Title	Chapter	341 Meeting	Judge Name	Trustee Name
5-30043	John R. Anderson and Jane Anderson	7	First Meeting of Creditors with 341(a) meeting to be held on 02/15/2005 at 09:00 AM at BK Meeting Room, First Floor Knoxville, TN. Objections for Discharge due by 04/18/2005. Objections for Dischargeability due by 04/18/2005. (nahaty,)	Stair, Richard	Mostoller, Ann

Click 'Bankruptcy' from the main menu bar to continue.

This completes the four-step process to create a new bankruptcy case using CM/ECF. Many of you will likely enter all pertinent information into your bankruptcy petition software and then create the new case using Case Upload or Automatic (One-Touch) Case Upload. We will look at the CM/ECF Case Upload feature next.

Case Upload

Case Upload is a feature in CM/ECF that allows Debtor Attorneys using a Bankruptcy Petition Software Package to create case files in that 'third party' software and then 'upload' those cases into CM/ECF without retyping. Use of such software can save time and redundant data entry.

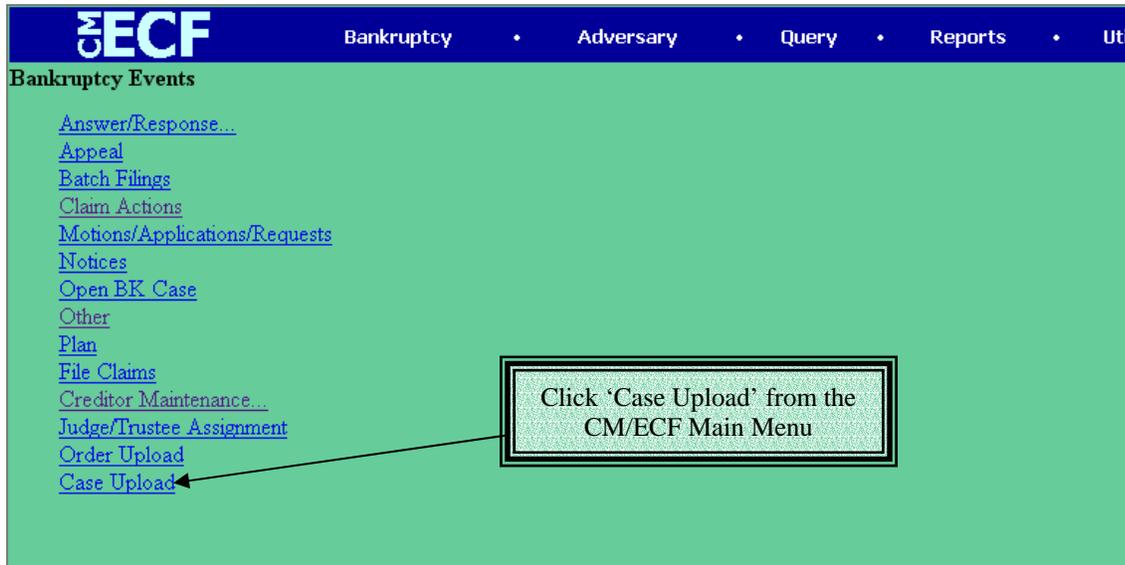
The U.S. Bankruptcy Court does not endorse any supplier of petition software over another.

The U.S. Bankruptcy Court does not provide technical support for any of the petition software packages. If you have difficulties, please contact your software supplier.

In most cases, your bankruptcy petition software creates the computer files necessary in CM/ECF (e.g. Petition, Plan, Matrix, Etc.). These files are stored in a folder on your computer. We will use files created in a common petition preparation package to demonstrate the CM/ECF Case Upload feature in the following steps.

Click on 'Bankruptcy' in the main menu bar.

CM/ECF Main Menu



Click 'Case Upload'.

Case Upload Screen

MECF Bankruptcy • Adversary • Query • Reports • Util

Open New Bankruptcy Case

Enter the name of the case file
Example: c:Debtor.txt

Enter the name of the petition file
Example: c:Petition.pdf

Enter the name of the matrix file
Example: c:Creditor.txt

Enter the name of the Chap13 Plan file
Example: c:Plan.pdf

Click the first 'Browse' button.

The steps for uploading the required documents for case upload follow the same procedures as for any PDF document, see page 18 for detailed instructions.

Fee Amount Screen (Case Upload)

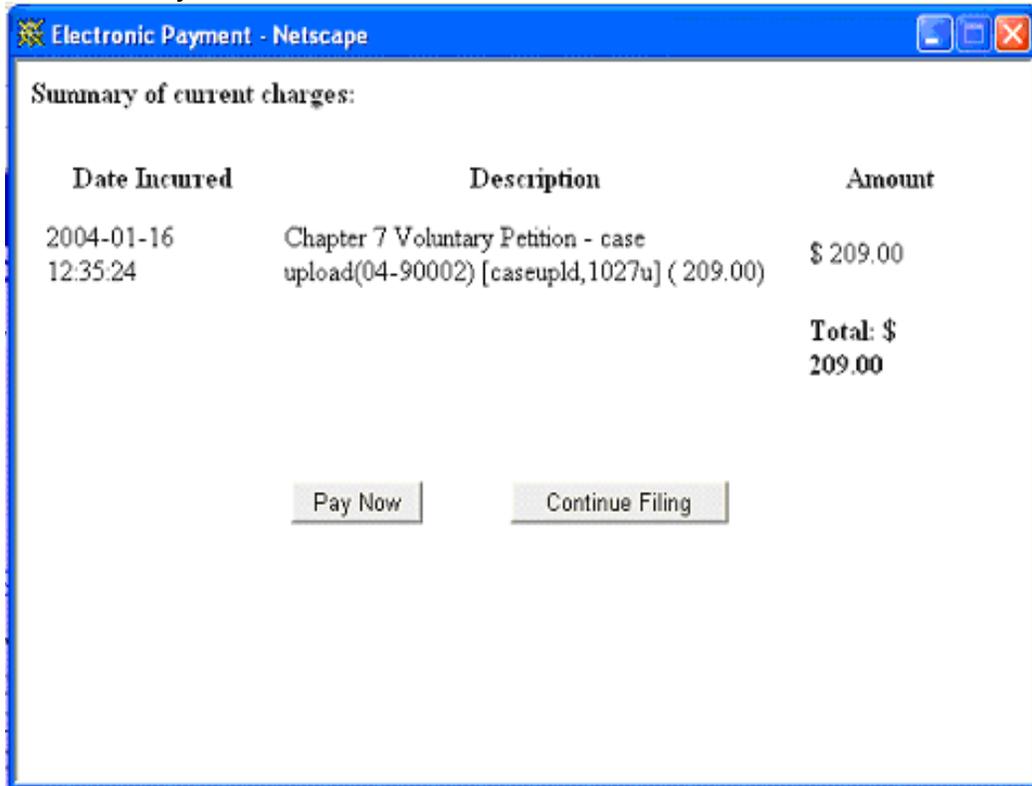
MECF Bankruptcy • Adversary •

Open New Bankruptcy Case

Fee: \$

The fee amount will default to the appropriate amount for each chapter. Click 'Next'.

Electronic Payment Screen



The Internet Credit Card Payment and Notice of Electronic Filing screens will appear just as they did when we manually opened a case.

Motion for Relief from Stay

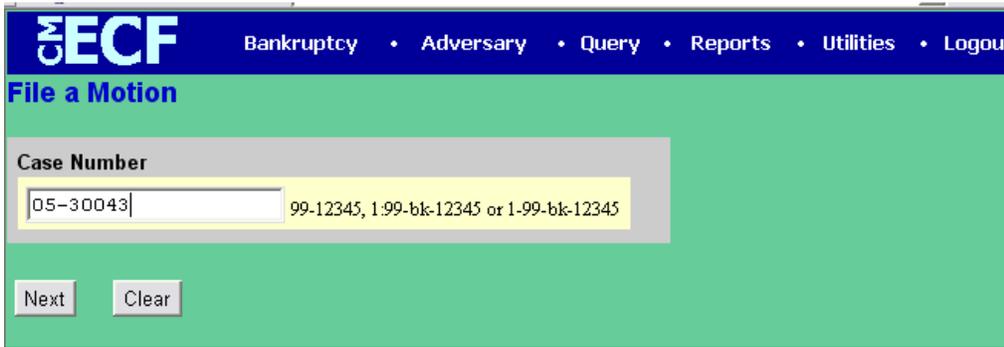
Bankruptcy Events Menu



The screenshot shows the ECF (Electronic Case Filing) interface. At the top is a dark blue navigation bar with the ECF logo on the left and a menu of options: Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. A yellow question mark icon is on the far right. Below the navigation bar is a green header area with the text "Bankruptcy Events". Underneath, a list of menu items is displayed in blue text: Answer/Response..., Appeal, Batch Filings, Claim Actions, Motions/Applications/Requests, Notices, Open BK Case, Other, Plan, File Claims, Creditor Maintenance..., Judge/Trustee Assignment, Order Upload, and Case Upload.

Click 'Motions/Applications/Requests' from the Bankruptcy Events Menu.

File a Motion Screen



The screenshot shows the "File a Motion" screen in the ECF system. It features the same dark blue navigation bar at the top. Below it is a green header with the text "File a Motion". A light gray box contains the label "Case Number" above a text input field. The input field contains the number "05-30043". To the right of the input field, there is a small text label: "99-12345, 1-99-bk-12345 or 1-99-bk-12345". Below the input field are two buttons: "Next" and "Clear".

Enter the correct case number (the one you just created) and click 'Next'.

File a Motion Screen (Reminder)



The screenshot shows the "File a Motion" screen with a reminder. It features the same dark blue navigation bar at the top. Below it is a green header with the text "File a Motion". A red text message reads: "REMEMBER!!! ALL MOTIONS MUST HAVE AN ATTACHED COPY OF THE PROPOSED ORDER". Below this message is a blue hyperlink: "3:05-bk-30043 John R. Anderson and Jane Anderson". At the bottom of the screen are two buttons: "Next" and "Clear".

Click 'Next'.

File a Motion Screen (Select Motion Type)

The screenshot shows the ECF (Electronic Case Filing) interface for filing a motion. The page title is "File a Motion: 3:05-bk-30043 John R. Anderson and Jane Anderson". A dropdown menu is open, displaying the following options: Redeem, Reinstate Case, Reinstate Document, Relief from Co-Debtor Stay, Relief from Stay (which is highlighted), Remand, Remove Debtor as Debtor in Possession, and Reopen Chapter 11. Below the dropdown menu, there is a checkbox labeled "Joint filing with other attorney(s)". At the bottom of the form, there are two buttons: "Next" and "Clear".

**Select the desired motion (Relief from Stay) from the pick-list.
Click 'Next'**

Discussion on Multiple Reliefs:

In some instances, the attorney may choose more than one relief from the list box above (such as Motion to Lift Stay & Adequate Protection for Creditor Attorneys) by holding down the 'Ctrl' key and clicking additional selections. *This should be done sparingly. It is best to file single-part motions if possible.*

NOTE: ALWAYS file a Motion to Convert by itself. ALWAYS file a Motion to Dismiss by itself.

File a Motion Screen (Party Selection)

File a Motion:

[3:05-bk-30043 John R. Anderson and Jane Anderson](#)

Select the Party:

Anderson, Jane [Joint Debtor]
Anderson, John R [Debtor]

[Add/Create New Party](#)

If the creditor you represent is not listed for this case, **Click Add/Create New Party.**

Next

Clear

Click 'Next'

To select multiple parties from the list, hold the 'Ctrl' key down while clicking on each party name. We will be filing on behalf of *Countrywide Mortgage*. If this choice does not appear in the list of parties, click on '**Add/Create New Party**' and add it to the list as follows:

Search for Party Screen

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout

Search for a party

SSN Tax Id

Last/Business name

Search Clear

Type Last Name or Creditor Name in the Last/Business name search box. Click 'Search'.

Search for Party Screen

Choose the appropriate party with correct address from the Party search results. Click 'Select name from list'.

Party Information Screen (Role Selection)

Party Role **MUST** be completed with role of added party. For this example we will select Creditor. Click 'Submit'.

File a Motion Screen

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

File a Motion:
[3:05-bk-30043 John R Anderson and Jane Anderson](#)

Select the Party:

[Add/Create New Party](#)

Countrywide Mortgage, [Creditor]
Anderson, Jane [Joint Debtor]
Anderson, John R [Debtor]

Next Clear

**Choose the appropriate party from the Party Selection List
Click 'Next'.**

Note: When a new party is added, the party selection screen displays to include added party. To select multiple parties from the list, hold the 'Ctrl' key down while clicking on each party name.

File a Motion Screen (Party Association)

File a Motion:
[3:05-bk-30043 John R Anderson and Jane Anderson](#)

The following attorney/party associations do not exist for this case.
Please check which associations should be created for this case:

Countrywide Mortgage, (cr:cr) represented by nahaty, (aty)

Next Clear

**Place check in box to show link between creditor and attorney filing the motion.
Click 'Next'.**

File a Motion Screen (PDF Upload)

File a Motion:
[3:05-bk-30043 John R. Anderson and Jane Anderson](#)

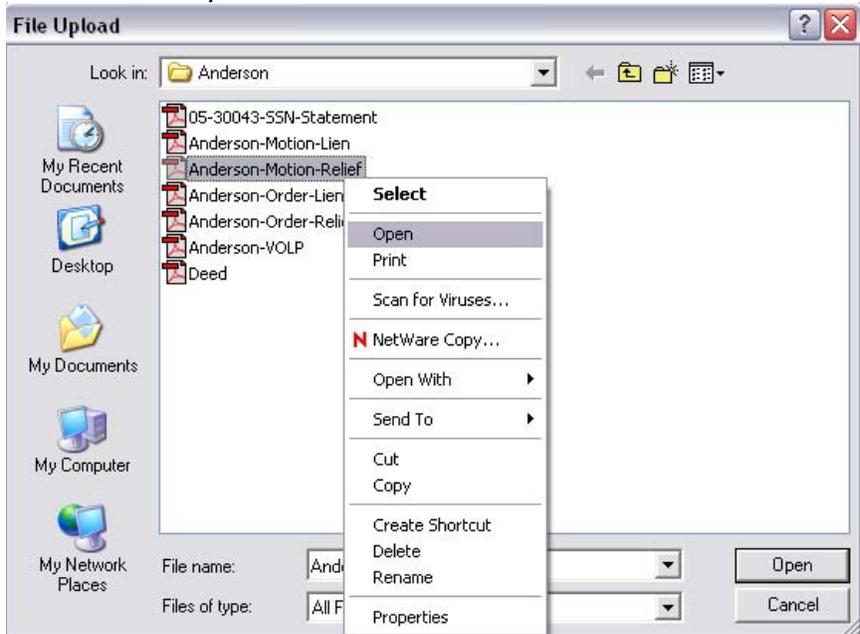
Select the **pdf** document (for example: C:\199cv501-21.pdf).

Filename

Attachments to Document: No Yes

Click 'Browse'.

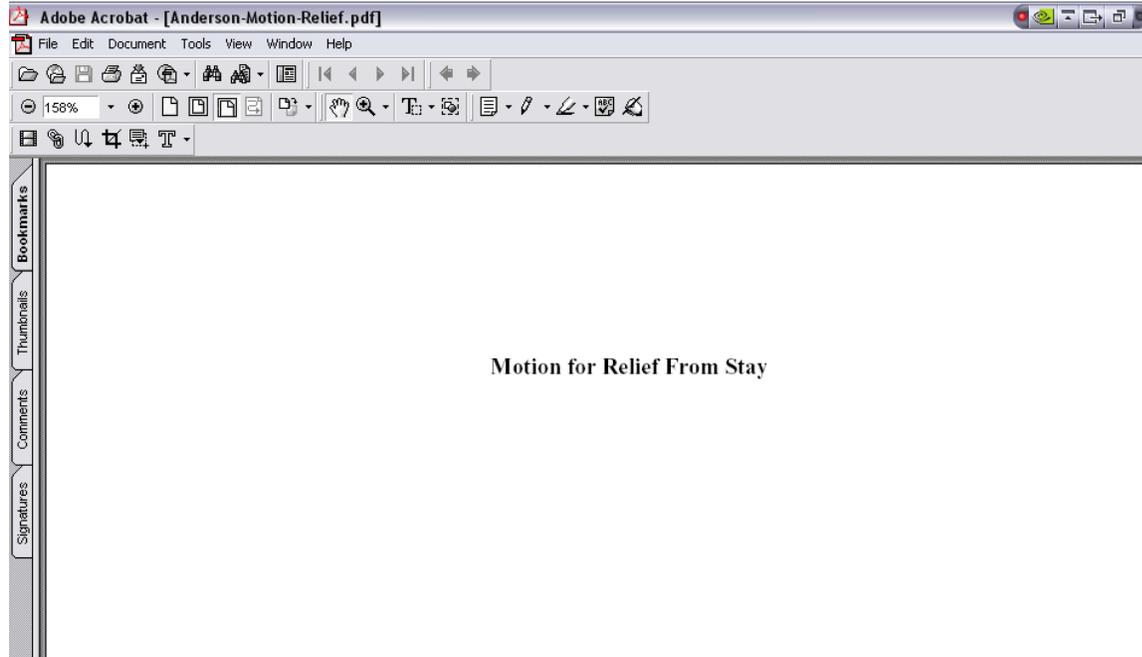
Windows File Upload Screen



Navigate to the appropriate .pdf file to upload. Our training example uses a file in the Anderson subfolder inside the Attorney Files folder on your desktop.

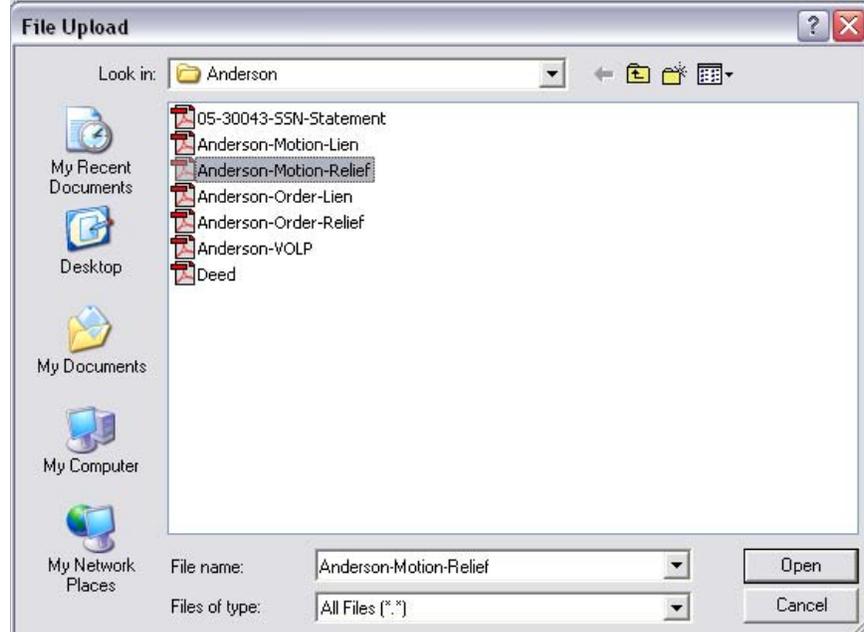
After locating the correct file, right click and choose 'Open' from the context menu to preview the actual document about to be uploaded.

Adobe Acrobat Preview Screen



Scroll down the pages to make sure this is the correct document and that it is legible. Close or minimize Adobe Acrobat after previewing the document.

Windows File Upload Screen



Click 'Open'

File a Motion Screen (PDF Upload)

File a Motion:
[3:05-bk-30043 John R. Anderson and Jane Anderson](#)

Select the **pdf** document (for example: C:\199cv501-21.pdf).

Filename

Attachments to Document: No Yes

ALWAYS click the 'yes' radio button to include supporting documents.

Click the 'yes' radio button. A separate file should be created for supporting documents, such as the required proposed order.
Click 'Next'

File a Motion Screen (Attachments)

File a Motion:
[3:05-bk-30043 John R. Anderson and Jane Anderson](#)

Select one or more attachments.

1) Enter the **pdf** document that contains attachment (for example: C:\appendix.pdf).

Filename

2) Select a document type and/or enter a description.

Type	Description
<input type="text"/>	<input type="text"/>

3) Add the filename to the list box below. If you have more attachments, go back to Step 1. When the list of filenames is complete, click on the Next button.

Browse for the pdf file. Remember to preview the document before selecting it to be added to the docket.
Click 'Browse'

File a Motion Screen (Attachments)

The screenshot shows the ECF 'File a Motion' interface. At the top, there is a blue navigation bar with the ECF logo and menu items: Bankruptcy, Adversary, Query, Reports, and Utilities. Below the navigation bar, the page title is 'File a Motion:' followed by a link to '3:05-bk-30043 John R. Anderson and Jane Anderson'. The main content area is green and contains the following steps:

Select one or more attachments.

1) Enter the pdf document that contains attachment (for example: C:\appendix.pdf).
Filename:

2) Select a document type and/or enter a description.
Type: Description:

3) Add the filename to the list box below. If you have more attachments, go back to Step 1. When the list of filenames is complete, click on the Next button.

The list box contains two entries:
C:\Documents and Settings\Administrator\Desktop\Attorney Files\Anderson\Anderson-Order-Relief.pdf
C:\Documents and Settings\Administrator\Desktop\Attorney Files\Anderson\Notice of Hearing.pdf

Buttons for 'Add to List' and 'Remove from List' are located to the right of the list box. A 'Next' button is at the bottom left of the form.

Select a type by using the arrow to the right of the 'Type' field. If no appropriate type is found, type a short description of the attachment in the 'Description' field. Click 'Add to List'. Once you've clicked 'Add to List' the data in the filename, type and description fields are removed allowing you to add more attachments. Click 'Next'.

File a Motion (Fees)

The screenshot shows the ECF 'File a Motion' interface for fees. It features the same blue navigation bar as the previous screen. The page title is 'File a Motion:' followed by a link to '3:05-bk-30043 John R. Anderson and Jane Anderson'. The main content area is green and contains the following information:

Fee: \$

Buttons for 'Next' and 'Clear' are located below the fee input field.

Fee information is provided. Click 'Next'.

File a Motion Screen (Hearing Selection)

ECF Bankruptcy • Adversary • Query • Reports • Utilities

File a Motion:
[3:05-bk-30043 John R. Anderson and Jane Anderson](#)

Do You Want to Set a Hearing Date For This Matter [y/n]:

Certain motions do not need to be set for hearing and can be handled using “passive notice”. Consult the court’s local rules to determine whether a hearing must be set. The local rules also provide guidance about hearing dates and time frames. Click ‘Next’.

File a Motion Screen (Setting Hearing)

File a Motion:
[3:05-bk-30043 John R. Anderson and Jane Anderson](#)

Please see E.D. Tenn. LBR 9013-1(f)(2) for scheduling requirements. Available hearing dates and times are on the court's web site www.tneb.uscourts.gov

Hearing Date: Hearing Time: AM PM

Location:

Set the hearing date, time, and **APPROPRIATE** location. Click ‘Next’.

PLEASE NOTE: The hearing location must be in the division where the case is pending. For example, a hearing in a Winchester case must be set in Winchester.

Docket Text Screen (Review)

Docket Text: Modify as Appropriate.

Motion for Relief from Stay . Fee Amount \$150,
Filed by nahaty on behalf of Creditor Countrywide Mortgage Hearing scheduled 2/23/2005 at 10:00 AM at Ctrm 1C Baker Crths Knoxville, TN. (Attachments: # (1) Proposed Order) (nahaty,)

Look at the choices in the drop down box, and then leave it blank for this example. This drop down box will normally not be used. The text box after the creditor name will normally be left blank since there will be an associated document that can be viewed for more information. Click ‘Next’.

Docket Text (Final)

Docket Text: Final Text

**Motion for Relief from Stay. Fee Amount \$150, Filed by nahaty on behalf of Creditor Countrywide Mortgage Hearing scheduled 2/23/2005 at 10:00 AM at Ctrm 1C Baker Crths Knoxville, TN.
(Attachments: # (1) Proposed Order) (nahaty,)**

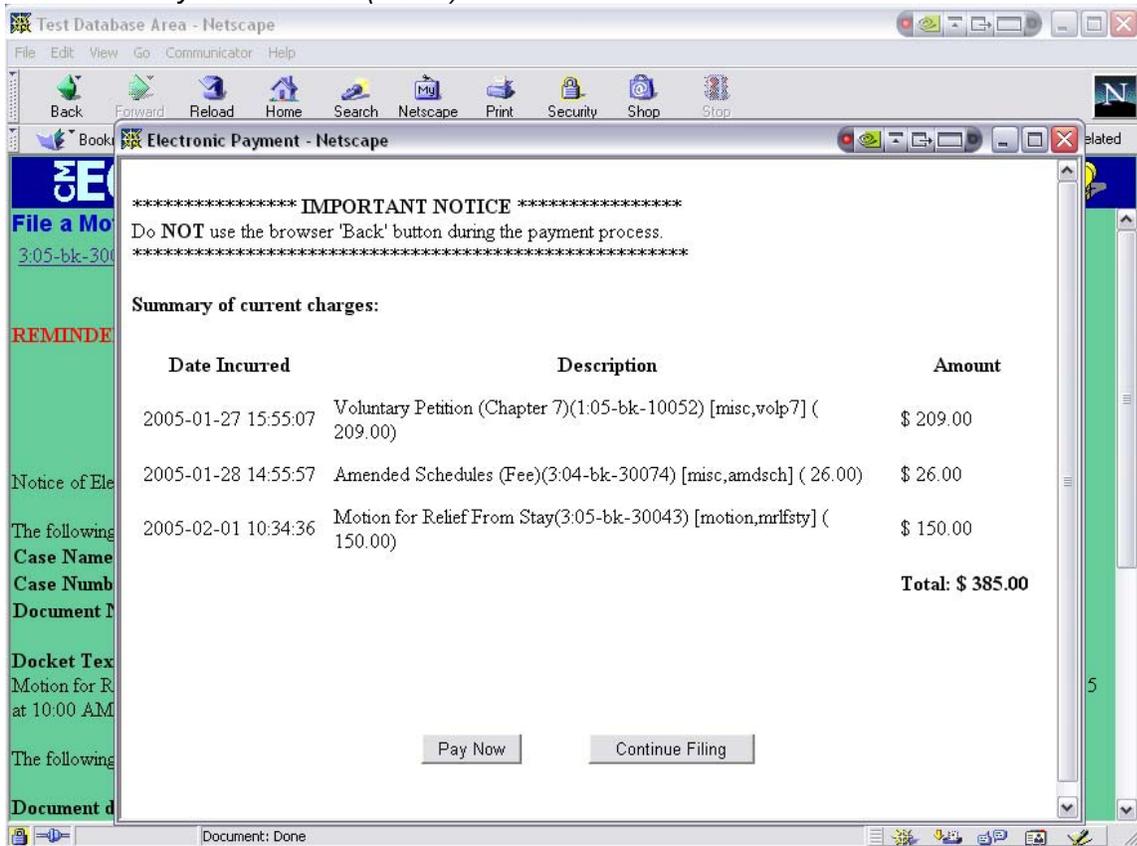
Attention!! Submitting this screen commits this transaction. You will have no further opportunity to modify this submission if you continue.

Proof the docket text carefully!

This is what will print on the docket sheet. If the docket text is incorrect, click the browser [Back] button at the top of the screen one or more times to find the screen to be modified, make the correction, and continue through this event. To abort or restart the transaction, click on the Bankruptcy hyperlink on the CM/ECF Main Menu Bar. Although this can be done at any time, this is your last opportunity to change the event.

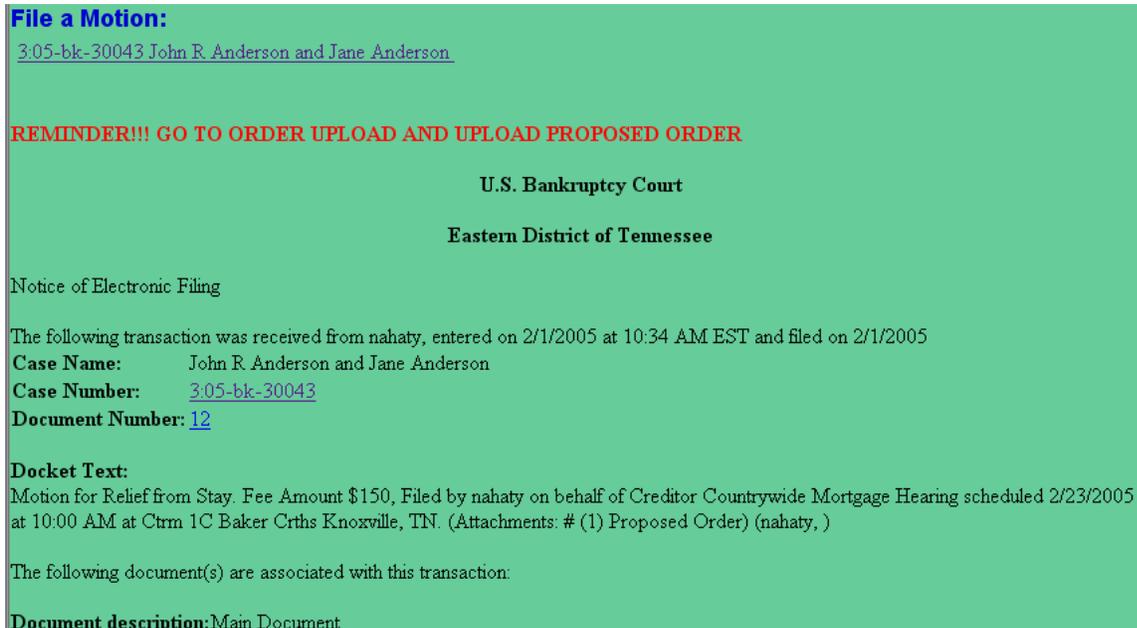
Click 'Next'.

Electronic Payment Screen (Detail)



Choose 'Pay Now' if you are finished filing or choose 'Continue Filing' to complete all docket transactions prior to paying for the Motion for Relief from Stay.

File a Motion



Take note of the document number on this page. It will be useful when uploading an e-order to the Judge's Chambers.

[At this time most Attorneys will want to print and/or save the Notice of Electronic Filing which would correspond to a file stamp for your document. Future access to this document can be made using PACER (for a fee).]

Take note of the document number of this Motion. We will upload a proposed order on this Motion to E-Orders in the following steps.

Uploading an Order

Even though you have attached a proposed order to the filed motion, you must still upload the proposed order to the Judge’s Chambers. The required format of the proposed order is set forth in the Administrative Procedures adopted by the court.

To upload an order that corresponds to the Motion for Relief from Stay just filed, go to the ‘Bankruptcy Menu’.

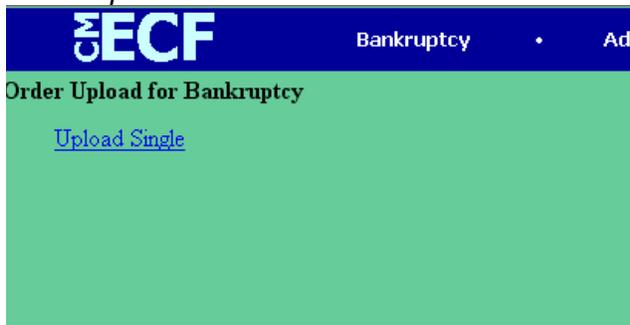
Click ‘Bankruptcy’

Bankruptcy Events Screen



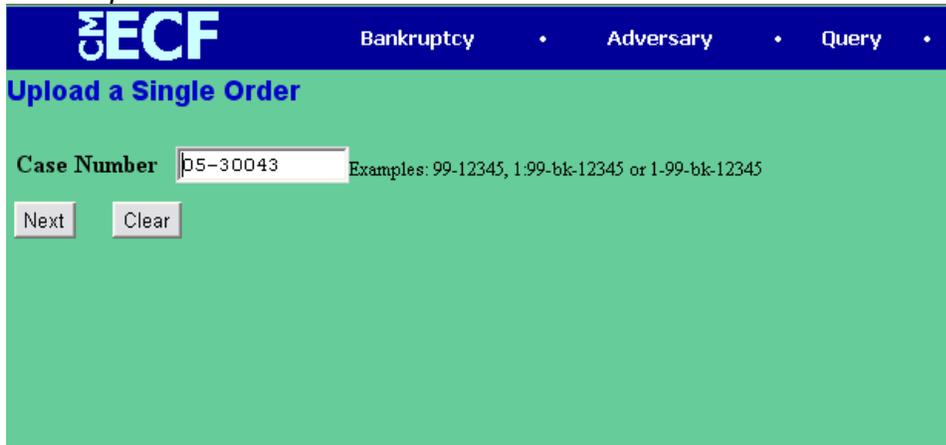
Click ‘Order Upload’

Order Upload Screen



Click ‘Upload Single’

Order Upload Screen



Type in the correct case number (if not there already) and click 'Next'.

Relate this Order to the document number of the motion, etc. (e.g. Motion for Relief from Stay)



Leave the related document number blank.
Click 'Next'.

Related Documents Screen

ECF Bankruptcy • Adversary

Upload a Single Order

Select the category to which your event relates:

- court
- creditor
- cred
- misc
- motion**
- notice
- order
- plan
- trustee
- utility

Filed to

Documents to

Select 'motion'.
Click 'Next'.

Upload a Single Order Screen

ECF Bankruptcy • Adversary

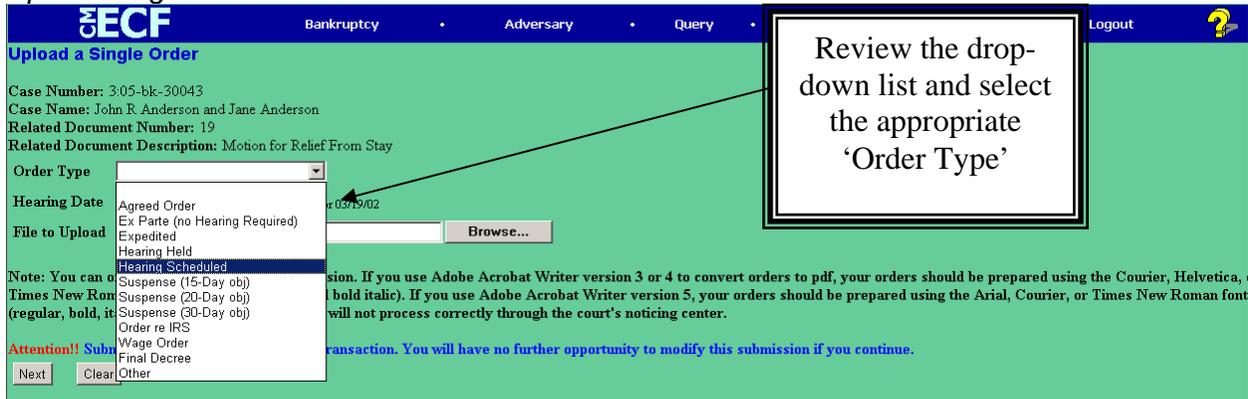
Upload a Single Order

Select the appropriate event(s) to which your event relates:

- 03/01/2005 [19](#) Motion for Relief from Stay. Fee Amount \$150, Filed by nahaty on behalf of Creditor Countrywide Mortgage Hearing scheduled 3/30/2005 at 09:00 AM at Ctrm 1C Baker Crths Knoxville, TN. (Attachments: # (1) Proposed Order) (nahaty,)

Select the document to which the order relates.
Click 'Next'.

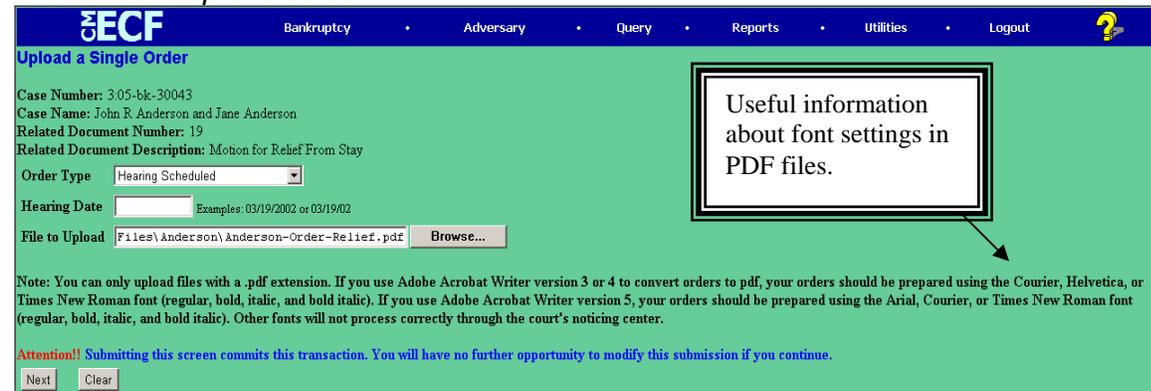
Upload Single Order Screen



Select 'Hearing Scheduled' from the 'Order Type' drop-down list.
Click 'Browse'

The steps for uploading the required documents for Motions and Orders follow the same procedures as for any PDF document. See page 18 for detailed instructions.

CM/ECF File Upload Screen



The filename and path for the order is entered into the 'Browse' text box.
Click 'Next'

Order Upload Confirmation Screen



This is your confirmation that your order was successfully uploaded to the Judge's Chambers.

Motion to Avoid Lien and Order

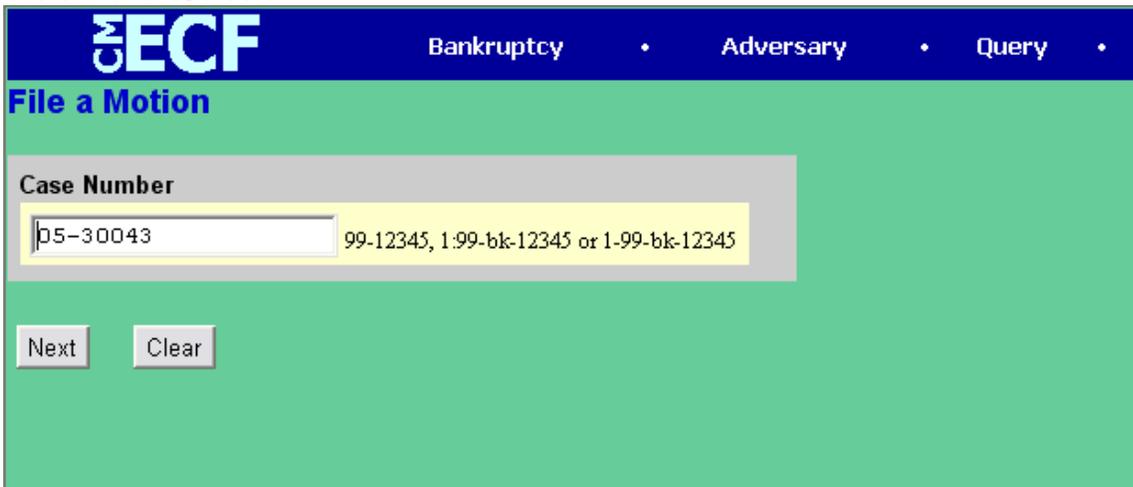
IMPORTANT: Attorneys are advised to consult the court’s local rules regarding motion practice before filing any motions.

Bankruptcy Events Menu



From the Bankruptcy Events menu – click ‘Motions/Applications/Requests’.

File a Motion Screen



Enter the correct case number (the one you just created), and click ‘Next’.

File a Motion Screen

ECF Bankruptcy • Adversary • Query • Reports • Utilities

File a Motion

REMEMBER!!! ALL MOTIONS MUST HAVE AN ATTACHED COPY OF THE PROPOSED ORDER

[3:05-bk-30043 John R. Anderson and Jane Anderson](#)

Next Clear

Click 'Next'.

Motions Selection List

ECF Bankruptcy •

File a Motion:

[3:05-bk-30043 John R. Anderson and Jane Anderson](#)

Assume/Reject
Avoid Lien
Borrow
Compel
Compel Abandonment
Compensation
Compromise
Consent

Joint filing with other attorney(s).

Next Clear

Choose desired motion (Avoid Lien) from the list and click 'Next'.

File a Motion Screen (Party Selection)

The screenshot shows the ECF system interface. At the top is a blue header with the ECF logo and the text 'Bankruptcy • Adversary'. Below the header, the page title is 'File a Motion:' followed by a blue hyperlink '3:05-bk-30043 John R. Anderson and Jane Anderson'. The main content area has a green background and is titled 'Select the Party:'. It features a scrollable list box containing three entries: 'Commercial Credit, [Creditor]', 'Anderson, Jane [Joint Debtor]', and 'Anderson, John R [Debtor]'. To the right of the list is a blue hyperlink 'Add/Create New Party'. At the bottom of the list box are two buttons: 'Next' and 'Clear'.

Select the appropriate parties from the Party Selection List. To select multiple parties from the list, hold the 'Ctrl' key down while clicking on each party name. Click 'Next'.

File a Motion Screen

The screenshot shows the ECF system interface. At the top is a blue header with the ECF logo and the text 'Bankruptcy • Adversary •'. Below the header, the page title is 'File a Motion:' followed by a blue hyperlink '3:05-bk-30043 John R. Anderson and Jane Anderson'. The main content area has a green background and contains the instruction 'Select the pdf document (for example: C:\199cv501-21.pdf)'. Below this is the label 'Filename' followed by a text input field and a 'Browse...' button. Underneath is the label 'Attachments to Document:' followed by two radio buttons: 'No' (which is selected) and 'Yes'. At the bottom of the form are two buttons: 'Next' and 'Clear'.

Click 'Browse'.

The steps for uploading the Motion to Avoid Lien and Proposed Order PDF documents follow the same procedures as for any PDF document, see page 53 for detailed instructions.

File Association Screen

ECF Bankruptcy • Adversary • Query • Reports

File a Motion:
[3:05-bk-30043 John R. Anderson and Jane Anderson](#)

Select the **pdf** document (for example: C:\199cv501-21.pdf).

Filename
C:\Anderson\Anderson-Motion-Lien.pdf

Attachments to Document: No Yes

A separate pdf file should be created for supporting documents, such as a proposed order, security agreement, etc. Click 'Next'.

The following screen is displayed if attachments (supporting documents) are included.

REMINDER: All motions **MUST** have the proposed order attached as an attachment to the motion.

File Attachment Screen

The screenshot shows the ECF 'File a Motion' interface. At the top is a blue navigation bar with the ECF logo and links for Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. Below the navigation bar, the page title is 'File a Motion:' followed by the case number '3:05-bk-30043 John R. Anderson and Jane Anderson'. The main content area has a light green background and contains the following elements:

- Select one or more attachments.**
- Step 1: 'Enter the pdf document that contains attachment (for example: C:\appendix.pdf)'. Below this is a 'Filename' label, an empty text input field, and a 'Browse...' button.
- Step 2: 'Select a document type and/or enter a description.' Below this are two labels: 'Type' and 'Description'. The 'Type' label is above a dropdown menu, and the 'Description' label is above an empty text input field.
- Step 3: 'Add the filename to the list box below. If you have more attachments, go back to Step 1. When the list of filenames is complete, click on the Next button.' Below this is a list box (currently empty), an 'Add to List' button, and a 'Remove from List' button.
- At the bottom left is a 'Next' button.

Browse for the pdf file. Remember to preview the document before selecting it to be added to the docket.

File a Motion Screen

This screenshot is similar to the previous one but shows the 'Add to List' button being clicked. The list box now contains two entries:

- C:\Attorney Files\Anderson\Anderson-Order-Lien.pdf
- C:\Attorney Files\Anderson\Deed.pdf

The 'Add to List' button is highlighted, and the 'Remove from List' button is visible below it. The 'Next' button remains at the bottom left.

Select a type by using the arrow to the right of the 'Type' field. If not found, type a short description of the attachment in the 'Description' field. Click 'Add to List'. Once you've clicked 'Add to List', the data in the filename, type and description fields is removed, allowing you to add more attachments.

Click 'Next'

File a Motion Screen

ECF Bankruptcy • Adversary • Query • Reports • Utilities

File a Motion:
[3:05-bk-30043 John R. Anderson and Jane Anderson](#)

Enter Creditor Name

Type the creditor name in the blank text box.

Click 'Next'.

File a Motion Screen

ECF Bankruptcy • Adversary • Query • Reports • Utilities

File a Motion:
[3:05-bk-30043 John R. Anderson and Jane Anderson](#)

Do You Want to Set a Hearing Date For This Matter[y/n]:

Certain motions do not need to be set for hearing and can be handled using “passive notice”. Consult the court’s local rules to determine whether a hearing must be set. The local rules also provide guidance about hearing dates and requisite time frames.

Click 'Next'.

File a Motion Screen

ECF Bankruptcy • Adversary • Query • Reports • Utilities

File a Motion:
[3:05-bk-30043 John R. Anderson and Jane Anderson](#)

Objection due date:

The Objection due date calculates automatically.

Click 'Next'.

Modify Docket Text Screen

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout

File a Motion:
[3:05-bk-30043 John R. Anderson and Jane Anderson](#)

Docket Text: **Modify as Appropriate.**

Motion to Avoid Lien with Commercial Credit Filed by nahaty on behalf of Joint Debtor Jane Anderson, Debtor John R Anderson Objections due by 2/15/2005. (Attachments: # (1) Proposed Order # (2) Deed of Trust) (nahaty,)

You will normally leave these boxes blank.

Look at the choices in the drop-down box for your own information, for now, leave it blank for this example. The textbox after the Creditor name will normally be left blank since there will be an associated document that can be viewed if there are any questions about the entry.
Click 'Next'.

Docket Text Preview Screen

ECF Bankruptcy • Adversary • Query • Reports • Utilities •

File a Motion:
[3:05-bk-30043 John R. Anderson and Jane Anderson](#)

Docket Text: **Final Text**

Motion to Avoid Lien with Commercial Credit Filed by nahaty on behalf of Joint Debtor Jane Anderson, Debtor John R Anderson Objections due by 2/15/2005. (Attachments: # (1) Proposed Order # (2) Deed of Trust) (nahaty,)

Attention! Submitting this screen commits this transaction. You will have no further opportunity to modify this submission if you continue.

Note: Proof this screen carefully!
Click 'Next'.

Notice of Electronic Filing

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout

File a Motion:
[3:05-bk-30043 John R. Anderson and Jane Anderson](#)

REMINDER!!! GO TO ORDER UPLOAD AND UPLOAD PROPOSED ORDER

U.S. Bankruptcy Court
Eastern District of Tennessee

Notice of Electronic Filing

The following transaction was received from nahaty, entered on 1/26/2005 at 4:23 PM EST and filed on 1/26/2005

Case Name: John R. Anderson and Jane Anderson
Case Number: [3:05-bk-30043](#)
Document Number: [10](#)

Docket Text:
Motion to Avoid Lien with Commercial Credit Filed by nahaty on behalf of Joint Debtor Jane Anderson, Debtor John R. Anderson Objections due by 2/15/2005 (Attachments: # (1) Proposed Order # (2) Deed of Trust) (nahaty,)

The following document(s) are associated with this transaction:

Document description: Main Document
Original filename: C:\Documents and Settings\Kristopher Kitts\Desktop\Attorney Files\Anderson\Anderson-Motion-Lien.pdf
Electronic document Stamp:

Notice the document number of this Motion. Upload a proposed order granting this motion into E-Orders as outlined starting on page 61 of this manual.

[Most Attorneys will want to print and/or save the Notice of Electronic Filing at this time. Future access to this document can be made using PACER (for a fee).]

Proofs of Claim

There is a “pdf” claim form on our Web site you can use to prepare the claim.

The following instructions pertain to using that form:

Visit our website at www.tneb.uscourts.gov to find the claim form.

Complete all fields. **IMPORTANT!** Remember to sign the document as /s/ signer's name
Click on the ‘Save a copy of the file’ icon in the Adobe Acrobat menu bar. The ‘save a copy’ window appears.

Change the ‘Save in:’ file to the folder you wish to save the pdf file in.

Name your pdf file in the ‘File name’ field.

Verify that Adobe PDF Files (*.pdf) is selected in the ‘Save as type.’ field.

Click on the Save button

To file a proof of claim in CM/ECF, you must first locate the creditor by searching the list of creditors associated with that case and then enter the corresponding claim.

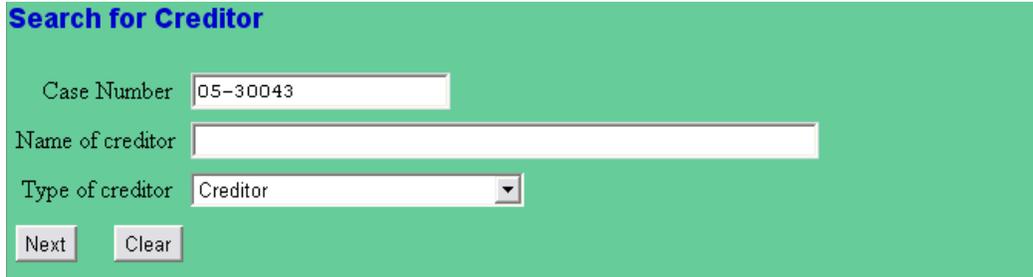
Click on ‘Bankruptcy’ to begin this section.

Bankruptcy Events Menu



Click on ‘File Claims’.

Search for Creditor Screen



Enter the correct case number. Leave the 'Name of creditor' text box blank. Leave the 'Type of Creditor' set to 'Creditor'. Click 'Next'.

Search for appropriate creditor. Verify that the creditor's address is the same.

If creditor is not listed or listed at a different address: **add creditor**

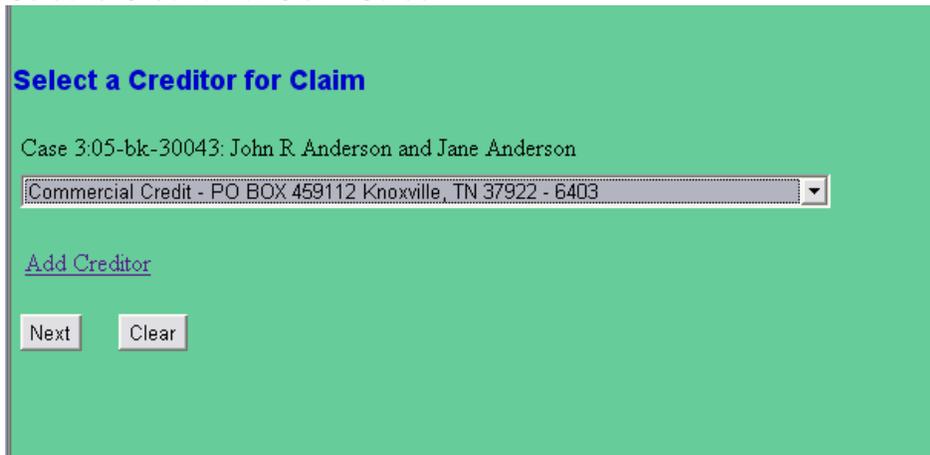
If you are representing the creditor and would like notices sent to you rather than the creditor, enter claimant as follows:

Claimant
c/o attorney
Attorney's address

If you are representing the creditor and would like notices sent to BOTH you and the creditor, enter claimant as follows, and file a Notice of Appearance and Request for Notice on behalf of the creditor.

Claimant
Address of Claimant

Select a Creditor for Claim Screen



Choose the correct Creditor from the drop-down box and click 'Next'.

NOTE: If the Creditor does not appear in the drop-down list, or if the Creditor’s address information needs to be modified, click the ‘Add Creditor’ link and enter Creditor information.

Proof of Claim Information Screen

Proof Of Claim Information For				
6403 - Commercial Credit PO BOX 459112 Knoxville, TN 37922				
Case Number: 3:05-bk-30043	Claim No:	Amends Claim #: <input type="text"/>	Duplicates Claim #: <input type="text"/>	Filed By: Creditor <input type="text"/>
Last Date To File:	Last Date To File(Govt):	Date Filed: 02/01/2005	Late: No <input type="text"/>	Status: <input type="text"/>
Amount Claimed				
Unsecured <input type="text"/>	Secured 6754.32	Priority <input type="text"/>	Unknown <input type="text"/>	Total (Display Only) 6754.32
Amount Allowed				Total (Display Only) <input type="text"/>
Description:	<input type="text"/>			
Remarks:	<input type="text"/>			
<input type="button" value="Next"/> <input type="button" value="Clear"/>				

Fill in the Claims Information Screen with the appropriate information. In our example, we are filing a \$6,754.32 secured claim. Complete the screen as shown above and Click ‘Next’.

If the claim is being filed by someone other than the creditor, change the ‘Filed By’ to the appropriate person type.

Proof of Claim (PDF Upload)

Bankruptcy • Adversary • Query • Reports • Utilities • Logout	
Case 3:05-bk-30043 Select the pdf document (for example: CA199cv501-21.pdf). Filename <input style="width: 200px;" type="text"/> <input type="button" value="Browse..."/> Attachments to Document: <input checked="" type="radio"/> No <input type="radio"/> Yes <input type="button" value="Next"/> <input type="button" value="Clear"/>	

Click the ‘Browse’ button.

The steps for uploading the Proof of Claim and attachments follow the same procedures as for any PDF documents. See page 53 for detailed instructions and be sure to attach any necessary supporting documents.

Notice of Electronic Filing

CM/ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout

U.S. Bankruptcy Court
Eastern District of Tennessee

Notice of Electronic Claims Filing

The following transaction was received from nahaty, on 2/1/2005 at 11:08 AM EST

Case Name: John R. Anderson and Jane Anderson
Case Number: [3:05-bk-30043](#)
Commercial Credit
Creditor Name: PO BOX 459112
Knoxville, TN 37922
Claim Number: [1](#)
Total Amount Claimed: \$6754.32

The following document(s) are associated with this transaction:

Document description: Main Document
Original filename: C:\Attorney Files\Anderson\Commercial Credit-POC.pdf
Electronic document Stamp:
[STAMP bkecfStamp_ID=1046181277 [Date=2/1/2005] [FileNumber=55977-0] [182bad1bf13ff800671939246706bc0ecd800175e58a1ce8fc01f213cd5f8e8b9efaaac118814d9cec18ee74c8e803244ad51f63ea4d6254e994a3c9208323201]

Hyperlinks to Docket Query Menu and pdf file

File Specifications and Size Limitations:

CM/ECF uses 'Portable Document Format' (pdf) for electronic filing of all case pleadings (with the exception of the 'Creditor Matrix', which uses a text file ('.txt')). Certain reasonable size limitations exist for the files uploaded into CM/ECF.

All files (documents and attachments) cannot exceed 2 MB or approximately 50 pages in size. For larger files (such as Exhibits), it may be necessary to break apart the file into pieces and attach the pieces separately. Pursuant to the Administrative Procedures for Electronic Case Filing, filers are encouraged to submit as exhibits or attachments only those excerpts of the referenced documents that are directly germane to the matter under consideration by the court, clearly and prominently identified as such. Filing excerpts will not prejudice the right to timely file additional excerpts or the complete document.

Opening an Adversary Proceeding

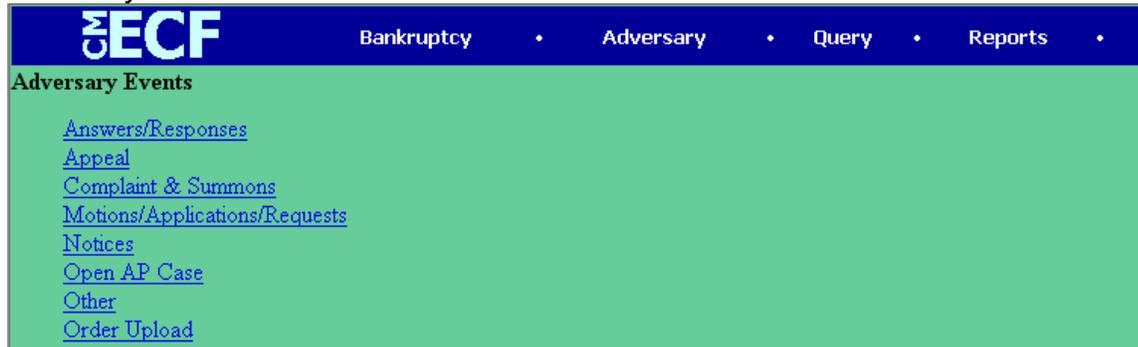
Opening an Adversary Proceeding involves entering the necessary information regarding the plaintiff, defendant, and basic statistical data. The complaint is incorporated into this process and will not need to be docketed separately. During the filing of this event (unlike the opening of a Bankruptcy Case), the attorney for the plaintiff must select himself/herself at the attorney selection screen.

CM/ECF Main Menu



Click 'Adversary' on the blue menu bar at the top of your screen.

Adversary Events screen



Click on 'Open AP Case'

Open Adversary Case Screen



The **Case Type** value defaults to **ap** for adversary proceeding.

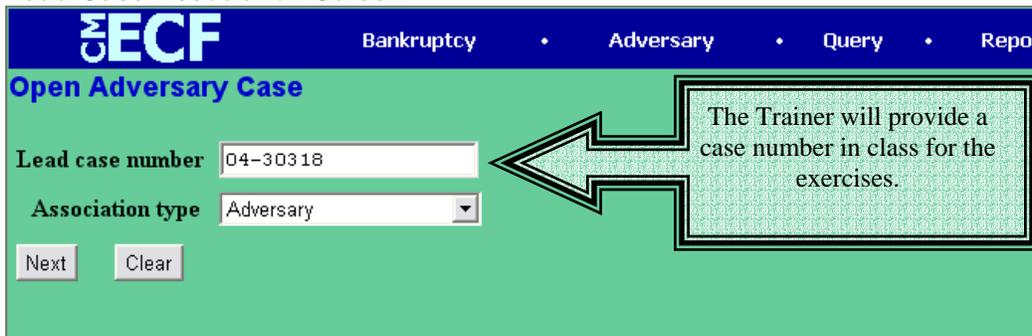
The current date is displayed next to **Date Filed**.

The **Complaint** field defaults to 'y' for 'yes' to indicate that a complaint is being filed.

The **ap** number is generated at the end of this process. Make sure you record the number.

Click 'Next'

Lead Case Association Screen



Fill in the **Lead Case Number** in yy-nnnnn format, including the hyphen.
Then Click 'Next'.

The **Association type** defaults to Adversary. Other selections are Consolidated, Jointly Administered, and Related. Leave the default.

The **CASE ASSIGNMENT** screen displays. Case assignment is based on the lead Bankruptcy case.

Case Assignment Screen

Click 'Next'

The **PARTY SEARCH** screen appears.

Before adding a party, it is recommended that you search the database for the filer. You can search by Social Security Number, Tax Identification Number, Last Name or Business Name. For a business, enter the first word of the business name to search the database. The entire business name is stored in the **Last/Business name** field. The field size is 200 characters

Search for Party Screen

Enter the plaintiff's last/business name (Assetcare) and click 'Search'.

NOTE: You cannot use the asterisk * by itself as search criteria. If just the asterisk is used, the system displays a dialog box stating "A minimum of two consecutive characters of the last name is required for name search".

Search Hints:

- Enter a limited search string in at least one field of data to search.
- Format Social Security Number or Tax ID with hyphens.
- Include punctuation. (O'Brien, Zeta-Jones)
- Try alternate search clues if your first search is not successful.
- Partial names (minimum of two characters) can be entered.
- Wild cards (*) are not required at the end of search strings.
- Wild cards may be used before or within search strings. (*son, Gr?y)
- You cannot search by the asterisk * itself.

Party Search Results Screen

Your search may produce multiple results. If no results appear (as above)- click on 'Create new party' and add the Party.

NOTE: If the designated party is already in the database, the Party Search Results screen will provide a listing of parties matching your search criteria. In that situation, you would select the party by highlighting the name with your mouse and click on 'Select Name From List'. If you are choosing a party that is already in the database, verify the address to be sure that you are selecting the correct party.

Party Information Screen

The **Pro se** field defaults to no. Leave the default.

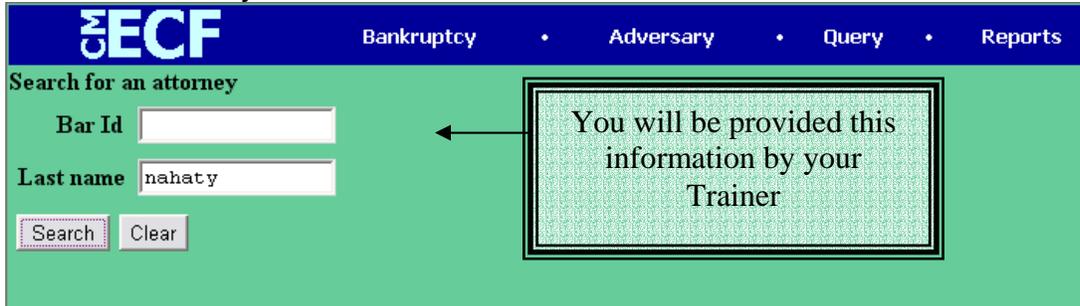
The **Party Text** field is used for further party description, such as A Tennessee Corporation or Trustee for the Estate. This information will appear on the caption of the docket report.

Complete the Party Information Screen as shown above—Then click 'Attorney'

IMPORTANT: For adversary proceeding openings **ONLY**, you will need to add yourself as the attorney representing the plaintiff(s). If you do not add yourself as the attorney for the plaintiff(s), the docket will **not** show you as attorney of record. Your attorney record already exists on the court’s database in an attorney roll that is maintained by court staff.

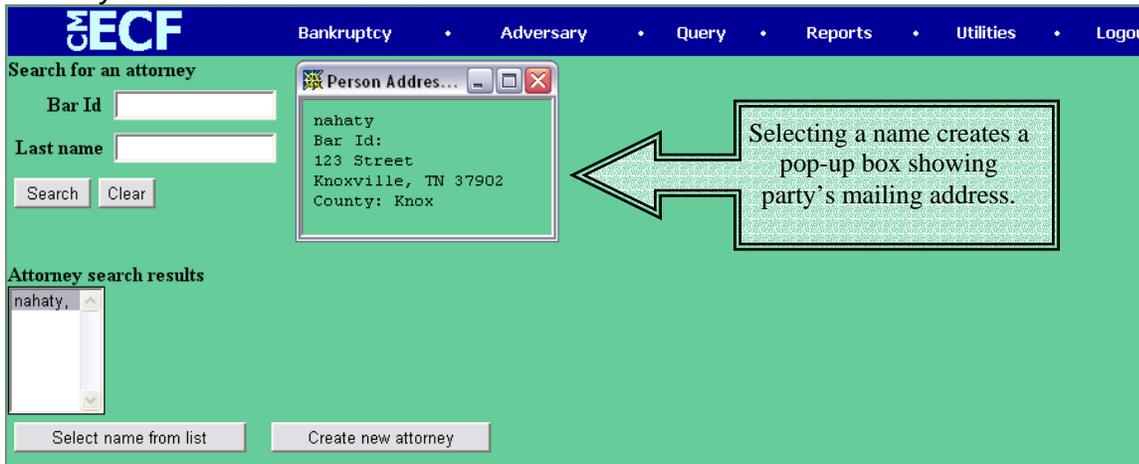
The **ATTORNEY SEARCH** screen allows you to retrieve your attorney record by Last Name or by the Attorney Bar ID number. (You can also search using a partial Last Name- minimum of 2 letters.)

Search for Attorney Screen



**Enter your Last Name (For class- enter your login)
Then Click ‘Search’.**

Attorney Search Results Screen



Select the appropriate name from the Attorney search results box. The Person Address Pop-up Box allows us to further distinguish between like-names in the Attorney Search Results list. Highlight your name and click on ‘Select name from list’.

Attorney Information Screen

Click 'Add attorney'.

The **Attorney Information** screen displays the master attorney record from the court attorney roll. Your attorney record can accommodate only one address. If the address for this case is different, make the changes to this screen. This will change professional and mailing information **FOR THIS CASE ONLY**. After verifying this information, click '**Add Attorney**' to associate this record with your plaintiff.

Party Information Screen

ECF Bankruptcy • Adversary • Query • Reports • Utilities

Party Information

Last name First name

Middle name Generation Title

SSN Tax ID

Office Address 1

Address 2 Address 3

City State Zip

County Country

Phone Fax

E-mail

ProSe Role

Party text

Attorney... Alias... Review... Add all attorneys and aliases before clicking the Submit button.

Submit Cancel Clear

Before submitting this screen, you may review the information you have entered so far by clicking the ‘Review’ button.

Review Attorney/Plaintiff Association Screen

Review attorneys and aliases
Assetcare, Inc.

Uncheck to remove from list

Attorneys added:

- nahaty, Nancy Harper - Aty
123 Street
Knoxville, TN 37902

Aliases added:
None added.

Return to Party screen Clear

Click on [Return to Party screen].

Party Information Screen

The **Party Information** screen appears. You have added the plaintiff. You have added yourself as the attorney for the plaintiff. If there are no more plaintiffs, the next step is to add the defendant(s). The **PARTY SEARCH** screen will appear again for that purpose. Click **'Submit'**.

Party Search Screen

Enter party information for the defendant: (Tony Bowling).

The Complaint lists the debtors as the defendants.

Type the last name **'Bowling'** in the box to search for your first defendant. You may also search by social security number and Tax ID number. Click **'Search'**

Party Search Results Screen

The screenshot shows the ECF Party Search Results Screen. At the top, there is a navigation bar with 'Bankruptcy', 'Adversary', 'Query', 'Reports', 'Utilities', and 'Logout'. Below this is a search form with fields for 'SSN', 'Tax Id', and 'Last/Business name'. There are 'Search' and 'Clear' buttons. The 'Party search results' section shows a list with 'Bowling, Tony (NMN)' and 'Bowling, Virginia (NMN)'. A 'Person Ad...' pop-up window is open, displaying details for 'Tony (NMN) Bowling', including 'SSN: xxx-xx-3986', 'PO Box 24', 'Speedwell, TN 37870', and 'County: Knox'. A callout box with an arrow points to the pop-up, stating: 'Selecting a name creates a pop-up box showing party's mailing address.' At the bottom, there are buttons for 'Select name from list' and 'Create new party'.

Choose the Defendant from the Party Search Results text box and Click ‘Select name from list’.

When the **Search Results** screen appears, the party name will appear in the display box since the debtors have already been added to the database.

Highlight the Debtor’s name in the results box, and click **‘Select Name From List’**. **(Note: you must select only one debtor at a time).**

IMPORTANT The search results may reveal several parties with similar names. Verify the address and the last 4 digits of the debtor’s social security number to be certain you are choosing the correct name to be associated with your adversary proceeding.

Party Information Screen

The screenshot shows the 'Party Information' form for 'Tony (NMN) Bowling' with SSN: xxx-xx-3986. The form contains the following fields and values: Office (empty), Address 1 (PO Box 24), Address 2 (empty), Address 3 (empty), City (Speedwell), State (TN), Zip (37870), County (Knox), Country (empty), Phone (empty), Fax (empty), E-mail (empty), ProSe (no), and Role (Defendant (dft:pty)). A callout box with a double border and an arrow pointing to the Role dropdown menu contains the text 'Role: Choose 'Defendant''. Below the form are buttons for 'Attorney...', 'Alias...', 'Review...', 'Submit', 'Cancel', and 'Clear'. A note states: 'Add all attorneys and aliases before clicking the Submit button.'

Change 'Party Role' to 'Defendant'.

The **Party Information Screen** appears next with the party's data and address as it is recorded in the database from the bankruptcy case.

You must select the party role by clicking on the down arrow for the **'Role'** field. Highlight **'Defendant'**.

Pro se will default to **'no'**, leave the default. Change the default to **'yes'** only when **(1) the debtor is Pro se** and **(2) if the defendant is a creditor.**

Click 'Attorney' to add the debtor's bankruptcy attorney.

Search for an Attorney Screen

The screenshot shows the 'Search for an attorney' form. It includes a 'Bar Id' text input field, a 'Last name' dropdown menu with 'Mayer' selected, and two buttons: 'Search' and 'Clear'.

Enter the last name or Bar ID of the debtor's attorney and Click 'Search'.

Attorney Search Results Screen

Highlight the attorney’s name and verify the address to be certain you have chosen the correct attorney already associated with this debtor in the bankruptcy case. Click ‘Select Name From List’.

Attorney Information Screen

After verifying this information, click ‘Add attorney’ to associate this attorney with your defendant.

IMPORTANT: **ONLY** add the attorney for the defendant when the **debtor is the defendant**. It is not necessary to add the attorney if the defendant is a creditor. A creditor’s attorney will be added when they file an answer or other response to the Complaint.

Party Information Screen

You have now added the first defendant. Click ‘Submit’.

The **Party Search** screen will reappear. Because we want to sue both of the debtors in this joint case, we will complete the party association steps again to include the joint debtor as a defendant.

Search for Party Screen

Type in the last name of the Joint Debtor (Bowling) and click ‘Search’.

Party Search Results Screen

Select the joint debtor from the list. Verify the address and social data as before and click ‘Select Name From List’.

Party Information Screen

Change ‘Party Role’ to ‘Defendant’ and add the joint debtor’s bankruptcy attorney. Verify the information as before and click ‘Submit’.

Search for Party Screen

ECF Bankruptcy • Adversary • Query • Reports

Open Adversary Case

Search for a party

SSN Tax Id

Last/Business name

Search Clear

End party selection

When all parties have been entered, click on the 'End Party Selection' button.

Open Adversary Case Screen

Enter Adversary Statistical Data. (See the following explanations for settings).
 Verify the data on your screen.
 Click 'Next'.

This is the **ADVERSARY STATISTICAL INFORMATION** screen (*above*).

- Unless the U.S. is a plaintiff or defendant in your case, accept the default “**U.S. not a Party**” as shown.
- For our exercise, select **426 (Dischargeability 523)** as the Nature of Suit of the complaint by clicking on the drop-down box.
- Only one suit can be selected during the opening of an adversary proceeding. Therefore, choose the “most severe” of each ‘Nature of Suit’ option from this pick list.

NOTE: If there are multiple suits and one is a **727 Objection to Discharge**, it is **VERY IMPORTANT** to enter **424** as the Nature of Suit here.

- The **Origin** code defaults to original proceeding. Accept the default.
- The default in the **Rule 23 (Class Action)** box is *n*. Change the default to **y** only if this is a Class Action suit.
- The default in the **Jury Demand** box is *n* (None). **Change to ‘y’ only when there is a demand for trial by jury.**
- For our case we will leave the default of **None**.
- **Dollar Demand.** If there is a dollar demand, enter the amount in thousands to the nearest thousand. For example, if the Dollar Demand is \$4550, \$5,000, or \$5499, you would enter 5 for \$5000, leaving off the 000. Since our Nature of Suit is Recover Money/Property, we will enter **6** for \$6,000.00.

Jury Demand Screen

MECF Bankruptcy • Adversary • Query • Reports • U

Open Adversary Case

Is there a Jury Demand?[Y/N]

Unless you are demanding a jury trial for your client, type 'n' in the box for none. Type 'n' and click 'Next'.

Open Adversary Screen

MECF Bankruptcy • Adversary • Query • R

Open Adversary Case

Is the plaintiff the Debtor, Trustee or Debtor in Possession? [n or y]

If you are the Debtor, Trustee or Debtor in Possession type 'y' in this box, otherwise leave the default 'n'. Selecting 'y' will defer the filing fee. Selecting 'n' will require you pay the fee at the time of filing.

CM/ECF File Upload Screen

MECF Bankruptcy • Adversary • Query • Reports • Ut

Open Adversary Case

Select the pdf document (for example: CA199cv501-21.pdf).

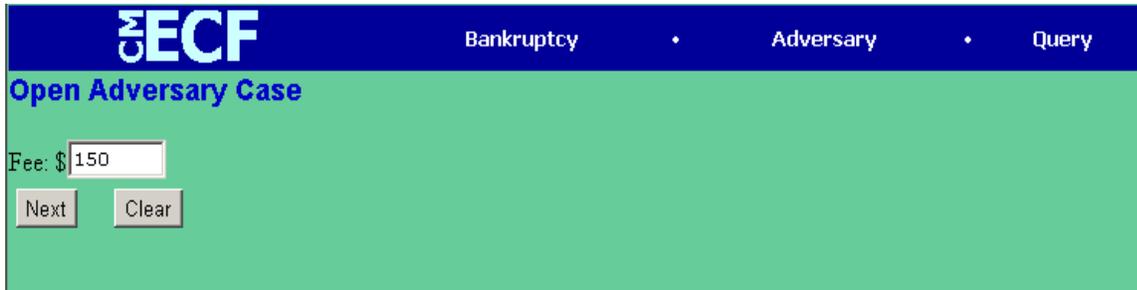
Filename

Attachments to Document: No Yes

Click [Browse].

The steps for uploading the Complaint PDF document follow the same procedures as for any PDF document, see page 53 for detailed instructions. Be sure to attach any necessary supporting documents.

Fee Amount Screen



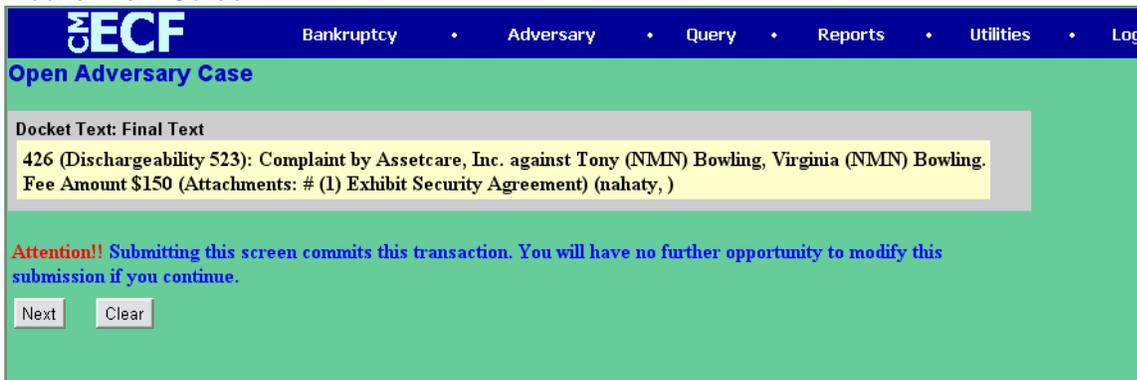
Click 'Next' when you have entered the appropriate amount. The fee amount will default to \$150.00. If you answer 'y' to the question "Is the plaintiff the Debtor, Trustee or Debtor in Possession? [n or y]" then this fee screen would not appear.

Open Adversary Case Screen



Click 'Next'.

Docket Text Screen



This is the **LAST** chance to review (or change) docket text. If something is incorrect, click the 'Back' button on the navigation toolbar in Netscape as many times as necessary until the screen where the correction needs to be made appears. Make necessary corrections to that screen (you will need to redo subsequent screens). Otherwise, Click 'Next'.

Each time you file a pleading in CM/ECF, the Electronic Payment Screen appears showing the balance of unpaid fees. As mentioned previously, you may pay now or continue filing. See BK Case Opening for complete discussion starting on page 23 of this manual.

Notice of Electronic Filing

Print or Save this screen. Refer to the instructions starting on page 27 for a complete tutorial on how to save/print this screen.

Scroll down to view the entire screen.

- 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.
- The case number is a hyperlink to the docket sheet and the document number is a hyperlink to the PDF document image. Clicking on either of these links will bring up the docket or the document.

The case number of both this adversary and the lead bankruptcy case appear.

This indicates that this complaint entry has spread to the bankruptcy case and will be available to anyone reviewing the Bankruptcy Docket report. The hyperlink to the imaged PDF complaint is also accessible from the bankruptcy case.

- To print a copy of this notice, click the browser **[Print]** icon.
- To save a copy of this notice, click **'File'** on the browser menu, click then **'Save Frame As'**
- Trustee and Attorney users will have access to the **Notice of Electronic Filing** at the time of their filing. Subsequent access to any Query or Report programs must go through the PACER system.

Summons Issuance

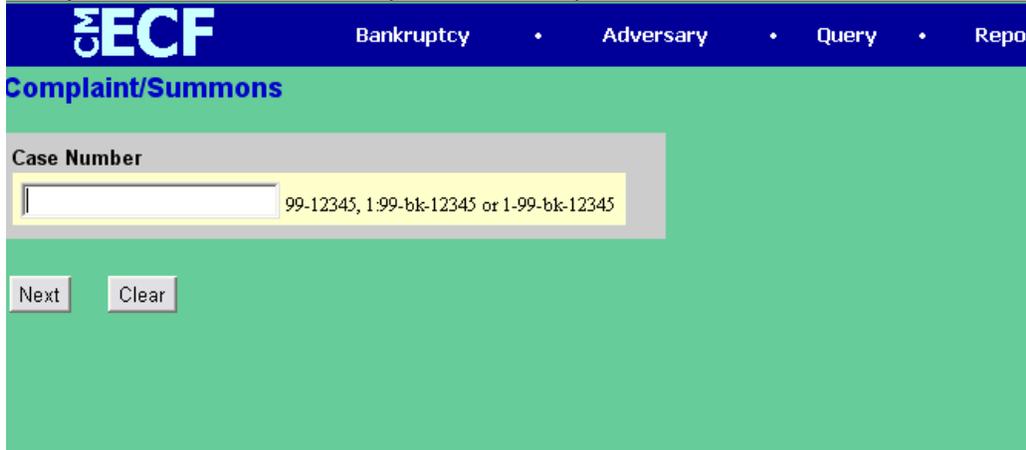
Click 'Adversary' from the main menu.

Adversary Events Screen



Click 'Complaint & Summons'

Complaint/Summons Screen (Case Number)



Type the Adversary Proceeding Number in the box.
Click 'Next'

Complaint/Summons Screen (Event Selection)

The screenshot shows the ECF interface for the case "3:05-ap-03009 Assetcare, Inc. v. Bowling et al". A dropdown menu is open, listing the following options: Amended Complaint, Counterclaim, Crossclaim, Motion for Default Judgment, Request for Entry of Default, Summons Request (highlighted), Summons Service Executed, and Summons Service Unexecuted. Below the menu are "Next" and "Clear" buttons.

Select 'Summons Request'
Click 'Next'

Complaint/Summons Screen (File Upload)

The screenshot shows the ECF interface for the case "3:05-ap-03009 Assetcare, Inc. v. Bowling et al". It prompts the user to "Select the pdf document (for example: CA199cv501-21.pdf)". There is a "Filename" label above a text input field and a "Browse..." button. Below this, it says "Attachments to Document:" with radio buttons for "No" (selected) and "Yes". At the bottom are "Next" and "Clear" buttons.

Click 'Browse'

The steps for uploading the Complaint and attachments follow the same procedures as for any PDF document. See page 53 for detailed instructions and be sure to attach any necessary supporting documents.

Complaint/Summons Screen (Select Party)

The screenshot shows the ECF system interface. At the top, there is a blue header with the ECF logo and navigation links for 'Bankruptcy' and 'Adversary'. Below the header, the page title is 'Complaint/Summons:' followed by the case name '3:05-ap-03009 Assetcare, Inc. v. Bowling et al'. The main content area has a green background and contains the instruction 'Select the party to be served.' Below this, there is a section titled 'Select the Party:' with a dropdown menu. The dropdown menu is open, showing three options: 'Assetcare, Inc. [Plaintiff]', 'Bowling, Tony (NMN) [Defendant]', and 'Bowling, Virginia (NMN) [Defendant]'. To the right of the dropdown menu is a link labeled 'Add/Create New Party'. At the bottom of the green area, there are two buttons: 'Next' and 'Clear'.

**Select necessary Defendants from the List.
Click 'Next'.**

NOTE: To select multiple parties from the list, hold the 'Ctrl' key down while clicking on each party name.

Complaint/Summons Screen

This screenshot is similar to the one above, showing the ECF system interface. It displays the same header and case information. However, the dropdown menu is no longer open. The 'Next' button is now highlighted with a red dashed border, indicating it is the focus of the instruction. The 'Clear' button is also visible.

Click 'Next'.

Docket Text Screen (Complaint/Summons)

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout

Complaint/Summons:
[3:05-ap-03009 Assetcare, Inc. v. Bowling et al](#)

Docket Text: Final Text
Request Summons Be Issued On Defendants Tony (NMN) Bowling, Virginia (NMN) Bowling (nahaty,)

Attention!! Submitting this screen commits this transaction. You will have no further opportunity to modify this submission if you continue.

This is the **LAST** chance to review (or change) docket text. If something is incorrect, click the 'Back' button on the navigation toolbar in Netscape as many times as necessary until the screen where the correction needs to be made appears. Make necessary corrections to that screen and then proceed forward with the docket event. Otherwise, Click 'Next'

Notice of Electronic Filing

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

Complaint/Summons:
[3:05-ap-03009 Assetcare, Inc. v. Bowling et al](#)

U.S. Bankruptcy Court
Eastern District of Tennessee

Notice of Electronic Filing

The following transaction was received from nahaty, entered on 2/15/2005 at 10:03 AM EST and filed on 2/15/2005

Case Name: Assetcare, Inc. v. Bowling et al
Case Number: [3:05-ap-03009](#)
Document Number: 4

Docket Text:
Request Summons Be Issued On Defendants Tony (NMN) Bowling, Virginia (NMN) Bowling (nahaty,)

The following document(s) are associated with this transaction:

You may want to print or save the Notice of Electronic filing for your records (as discussed in previous segments).

Upon the court receiving the Request for Summons to be issued, the adversary clerk will print the proposed Summons and issue it by placing the date, signature and the court seal upon the Summons. Then the clerk will rescan the issued Summons, docket it and send it by electronic submission to the plaintiff's attorney. The plaintiff's attorney is responsible for servicing the issued Summons and the Complaint upon the parties and certifying same to the court in accordance with the Federal Rules of Bankruptcy Procedure and local rules of the court.

Reports and Queries

Case information can be obtained by a series of Reports and Queries available in CM/ECF. The following is a brief look at three of the more common reports- Cases Report, Docket Report, and the Claims Register.

Cases Report

This lesson describes the Cases Report and how it can be generated. The Cases Report presents information from the court's database with a variety of selection criteria for case management and tracking.

Internet users will access CM/ECF through PACER and will use two sets of logins and passwords; one for CM/ECF filing and the other for PACER access to queries and reports. (*Note: Using your actual PACER login while in training does not incur PACER fees.*)

This module will assume that the Internet user has accessed the court's web site (<https://ecf-train.tneb.uscourts.gov>) with their court assigned CM/ECF login and password.

CM/ECF Main Menu



Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

U.S. Bankruptcy Court
Eastern District of Tennessee
Official Court Electronic Document Filing System

You are connected to the Training CM/ECF site for the United States Bankruptcy Court
for the
Eastern District of Tennessee
Version 2.6 Loaded 02/02/2005

This area will be used to alert users to current CM/ECF issues.

Click on 'Reports'

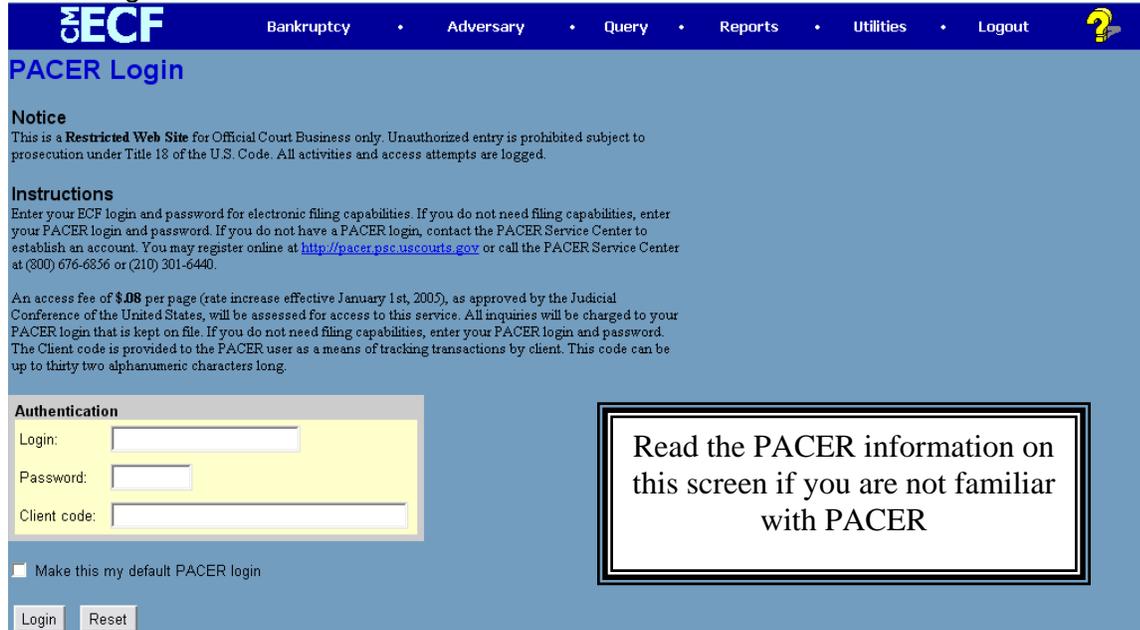
Reports Menu Screen



The list of available reports is shown.
Click on 'Cases'

NOTE: The Public Access to Court Electronic Records (PACER) program provides access to CM/ECF users. Logins and passwords can be issued by registration with the PACER Service Center. Current PACER logins and passwords will be accepted by the CM/ECF system.

Pacer Login Screen



Enter your PACER username and password.
Click 'Login'

You can enter a **Client Code**. This optional field is used for billing by PACER users. The data will be included in PACER billing reports. To change the client code within a session, go to 'Utilities' on the main CM/ECF menu, 'Your Pacer Account', select 'Change Your Client Code'.

NOTE: If you click in the **Make this my default PACER login** box, your login will automatically appear each time you attempt to access PACER. If you click on the **[Reset]** button, all entries will be cleared.

Cases Report Selection Screen

Set the report criteria as desired to limit your search results. For this example, leave the default settings.
Click 'Run Report'

NOTE: The 'Clear' button will reset all fields to their default values.

Cases Report Result Screen

Case No. Related Case Info	Tp	Ch	Party Info	Judge Trustee	Dates	Other Info
1:05-bk-10001	bk	7	Maxwell Q. Klinger	Cook Farinash	Filed: 01/13/2005 Entered: 01/13/2005	Office: Chattanooga Asset: No Fee: **Pick One** County: Hamilton
1:05-bk-10002	bk	13	Joseph Wayne Jefferson and Sarah Lynn Jefferson		Filed: 01/19/2005 Entered: 01/19/2005	Office: Chattanooga Asset: Yes Fee: Installment County: Hamilton
2:05-bk-50001	bk	7	Teddy McQuire		Filed: 01/24/2005 Entered: 01/24/2005	Office: Greenville Asset: No Fee: Paid County: Greene
2:05-bk-50002	bk	7	And and Anderson		Filed: 01/25/2005 Entered: 01/25/2005	Office: Greenville Asset: No Fee: **Pick One** County: Greene

Print or Save this screen as desired.

Clicking on any of the Case Number hyperlinks will display the 'Docket Sheet' screen, allowing you to enter criteria for generating the Docket Report.

Docket Report

This lesson describes the public Docket Report, sometimes called a Docket Sheet, and how it can be generated.

Internet users will access CM/ECF through PACER and will use two sets of logins and passwords; one for CM/ECF filing and the other for PACER access to queries and reports.

This module will assume that the internet user has accessed the court's web site with their court assigned CM/ECF login and password.

CM/ECF Main Screen



Click on 'Reports'

Reports Menu Screen



The list of available reports is shown.
Click on 'Docket Report'

PACER Login Screen

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

PACER Login

Notice
This is a **Restricted Web Site** for Official Court Business only. Unauthorized entry is prohibited subject to prosecution under Title 18 of the U.S. Code. All activities and access attempts are logged.

Instructions
Enter your ECF login and password for electronic filing capabilities. If you do not need filing capabilities, enter your PACER login and password. If you do not have a PACER login, contact the PACER Service Center to establish an account. You may register online at <http://pacer.psc.uscourts.gov> or call the PACER Service Center at (800) 676-6856 or (210) 301-6440.

An access fee of \$.08 per page (rate increase effective January 1st, 2005), as approved by the Judicial Conference of the United States, will be assessed for access to this service. All inquiries will be charged to your PACER login that is kept on file. If you do not need filing capabilities, enter your PACER login and password. The Client code is provided to the PACER user as a means of tracking transactions by client. This code can be up to thirty two alphanumeric characters long.

Authentication

Login:

Password:

Client code:

Make this my default PACER login

**Enter PACER Login and Password.
Click 'Login'**

Docket Selection Screen

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout

Docket Sheet

Case number

Filed to

Entered to

Documents to

Include terminated parties
 Include links to Notice of Electronic Filing

HTML
 Text

Sort by

You can limit the amount of information presented on reports by making selections in the list boxes and typing values in the text boxes on this screen. Preview the choices available in each of the drop-down boxes.

**Set the report criteria as desired to limit your search results. For this example, leave the default settings.
Click 'Run Report'**

Docket Report Screen (Docket Sheet)

ECF

[Bankruptcy](#) • [Adversary](#) • [Query](#) • [Reports](#) • [Utilities](#) • [Logout](#)

U.S. Bankruptcy Court
Eastern District of Tennessee (Knoxville)
Bankruptcy Petition #: 3:04-bk-30325

Assigned to: Judge Richard Stair Jr. *Date Filed:* 12/15/2004
 Chapter 7
 Voluntary
 No asset

John Ross Ewing, Jr represented by **Carter McKay**
 123 Dallas Street 123 Dallas Street
 Knoxville, TN 37901 Knoxville, TN 37901
 SSN: xxx-xx-4321

Debtor
aka
J.R. Ewing

Sue Ellen Shepard Ewing represented by **Carter McKay**
 123 Dallas Street (See above for address)
 Knoxville, TN 37901

Joint Debtor
aka
Sue Ellen Shepard Lockwood

Dean B. Farmer
 P. O. Box 869
 Knoxville, TN 37901
 865-546-9611
Trustee

Filing Date	#	Docket Text
12/15/2004	1	Chapter 7 Voluntary Petition . Fee Amount \$0.00 Filed by Carter McKay on behalf of John Ross Ewing Jr, Sue Ellen Shepard Ewing . (gnh,) (Entered: 12/15/2004)
12/15/2004		First Meeting of Creditors with 341(a) meeting to be held on 01/15/2005 at 09:00 AM at Ctrm 1B Baker Crths Knoxville, TN. Objections for Discharge due by 03/16/2005. Objections for Dischargeability due by 03/16/2005. (gnh,) (Entered: 12/15/2004)
12/15/2004	2	Application to Pay Filing Fee in Installments Filed by Carter McKay on behalf of Debtor John Ross Ewing Jr, Joint Debtor Sue Ellen Shepard Ewing (Attachments: # 1 Proposed Order) (gnh,) (Entered: 12/15/2004)
12/15/2004	3	Motion for Relief from Stay . Receipt Number cc, Fee Amount \$150, Filed by Bruce Harvey on behalf of Creditor Ewing Oil Objections due by 1/4/2005. (Attachments: # 1 Proposed Order) (gnh,) (Entered: 12/15/2004)
01/11/2005		Hearing Set (RE: related document(s) 3 Motion for Relief From Stay filed by Creditor Ewing Oil) Hearing scheduled 1/12/2005 at 04:20 AM at Ctrm 1C Baker Crths Knoxville, TN. (gnh,) (Entered: 01/11/2005)
01/12/2005		Hearing Set (RE: related document(s) 3 Motion for Relief From Stay filed by Creditor Ewing Oil) Hearing scheduled 1/14/2005 at 09:00 AM at Ctrm 1C Baker Crths Knoxville, TN. (gnh,) (Entered: 01/12/2005)

NOTE: Clicking on the various links on this Report will take you to the various documents in this case.

Docket Report Features

- Clicking on a “blue” document number hyperlink from the docket report will first display a transaction receipt indicating a billable amount if the user decides to accept the charges and view the PDF document.

NOTE: The opportunity to review charges **FIRST** applies to PDF documents only.

- If you choose to accept the charges, click on the **[View Document]** button to view the associated PDF document and the selected document will be displayed.
- After viewing the PDF document, either click on the **[Back]** icon of your Internet browser’s tool bar or close Acrobat Reader to return to the previously displayed screen.

NOTE: DO NOT exit out of your document reader. This will exit you out of CM/ECF.

- A separate Transaction Receipt will be displayed at the end of the docket report indicating the number of billable pages for the report.

Claims Register

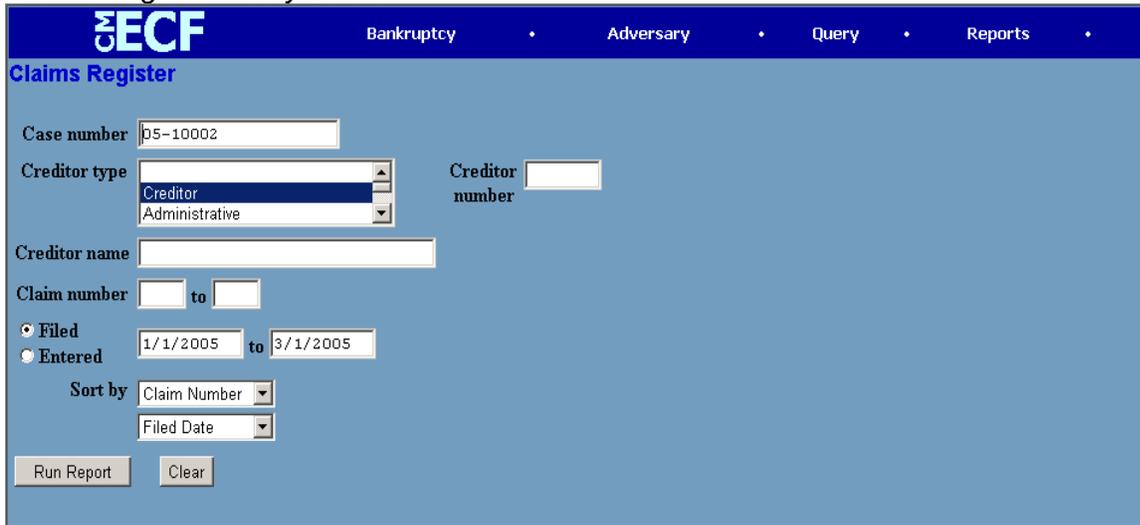
You can view the claims filed on a particular case from the Claims Register Report as follows:

Reports Selection Screen



Click 'Claims Register' from the Reports Menu

Claims Register Query Screen



Fill in the Case number and any additional criteria such as date range or claim number (Note- more information will narrow the search resulting in fewer results)
Click 'Run Report'

Claims Register Report Screen

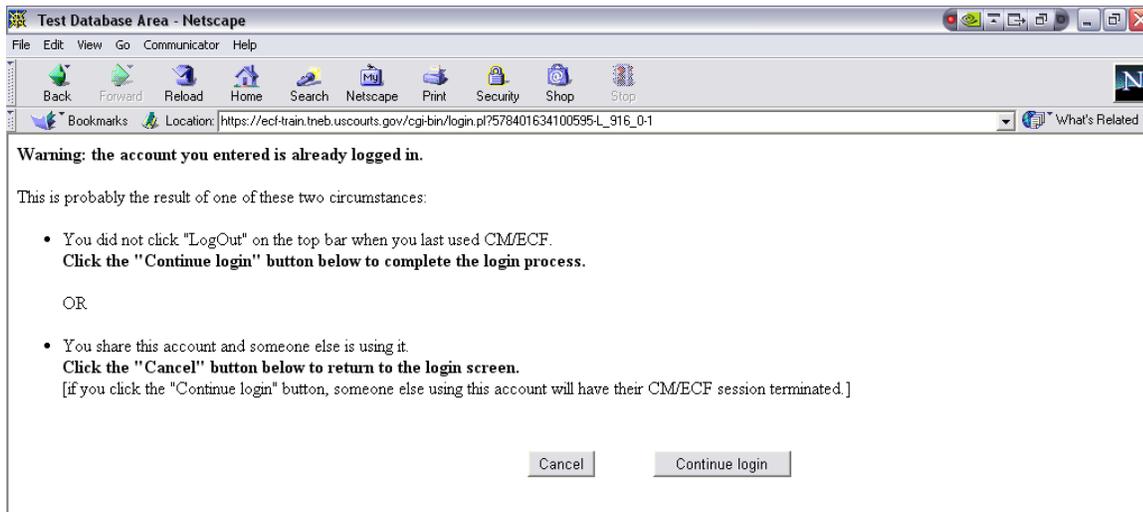
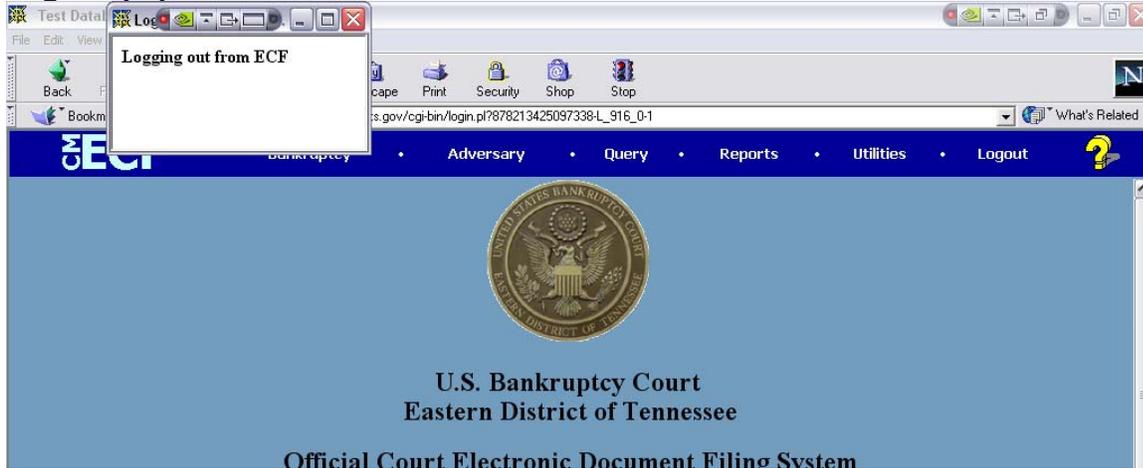
 Bankruptcy • Adversary • Query • Reports • Utilities • Logout 		
Eastern District of Tennessee Claims Register		
1:05-bk-10002 Joseph Wayne Jefferson and Sarah Lynn Jefferson		
Debtor Name: JEFFERSON,JOSEPH WAYNE		
Claim No: 1	Creditor Name: American National Bank 593 West Central Street Wilmette, IL 63221	Last Date to File Claims: Last Date to File (Govt): 07/18/2005 Filing Status: Docket Status: Late: N
Claim Date: 03/01/2005	Amends Claim No: Amended By Claim No:	Duplicates Claim No: Duplicated By Claim No:
Class	Amount Claimed	Amount Allowed
Unsecured	\$1500.00	
Total	\$1500.00	
Description:		
Remarks: (n/s)		
Claim No: 2	Creditor Name: First City Bank 560 North Michigan Avenue Chicago, IL 60604	Last Date to File Claims: Last Date to File (Govt): 07/18/2005 Filing Status: Docket Status: Late: N
Claim Date: 03/01/2005	Amends Claim No: Amended By Claim No:	Duplicates Claim No: Duplicated By Claim No:
Class	Amount Claimed	Amount Allowed
Unsecured	\$1500.00	
Total	\$1500.00	
Description:		
Remarks: (n/s)		
Claims Register Summary		
Case Name: Joseph Wayne Jefferson and Sarah Lynn Jefferson Case Number: 1:2005-bk-10002 Chapter: 13 Date Filed: 01/19/2005 Total Number Of Claims: 2		
	Total Amount Claimed	Total Amount Allowed
Unsecured	\$3000.00	
Secured		
Priority		
Unknown		
Administrative		
Total	\$3000.00	

Each of the claims meeting the criteria you entered above is presented with links to the actual claim form and all exhibits. The bottom of the screen shows the sum of each category (e.g. Secured, Unsecured, etc.) for the claims meeting these criteria.

Logging Out

It is best to 'Logout' of CM/ECF before closing Netscape rather than simply closing Netscape. If you close Netscape without logging out first, then open CM/ECF again, you will see the following screen because CM/ECF still thinks you're logged in. If you ever see the screen below, just click 'Continue login'. **(Note:** If you have been inactive on CM/ECF for over 20 minutes, the system will log you off automatically. When this happens, the login screen will appear as you attempt to continue working in CM/ECF- just log back in and continue working.)

Log out-pop screen



This concludes the CM/ECF training session for Attorneys. The Clerk's Office stands ready to assist you in every way we can. Thank you for attending.