

Slide 1 - Introduction Slide

The slide features a blue background with a faint watermark of a scale of justice and the text "AO-OIT-SDSD TRAINING BRANCH". At the top, a grey header bar contains the title "Maintain Your ECF Account" in blue, followed by "CM/ECF BK v3.3", an information icon, and the word "Animation". A white callout box in the upper right corner contains the following text:

Production Information:
Produced by AO-OIT-SDSD-TB
Contact Information: AOTXml_ELM@aotx.uscourts.gov

Electronic Learning Module Version 1.0
Maintain Your ECF Account - Attorney
Date 05/18/2009

Bankruptcy CM/ECF Release 3.3

In the center of the slide, a white rounded rectangle contains the text "Maintain Your ECF Account" in black.

Slide notes

Welcome to the Maintain Your ECF Account module.

Slide 2 - Navigation

Navigation Instructions: Each screen contains specific instructions to follow that mimic the actual software. Follow the instructions to progress through the lesson.

Playback Controls: Playback controls, located at the bottom of the screen, may be used to move forward or back, or to rewind to the beginning of the lesson. The playback controls also include a pause/play button toggle. If you pause the lesson, click the button again to resume.

Menu: Move the mouse over the word **MENU**, located in the upper left corner, to view the drop-down list of lesson topics. Click on the desired topic to jump to that part of the lesson.

Closed Captioning: Click the **CC** button in the playback controls to toggle the closed captioning feature on or off.

Audio: Click the **speaker icon** to toggle audio on or off.

Additional Information: Roll the mouse over the "i" located in the title bar to view module version and AO-OIT-SDSD-Training Branch contact information.

Exit the Lesson: To exit the lesson, click the **X** in the upper right corner of the lesson window, or select **Exit** from the menu.

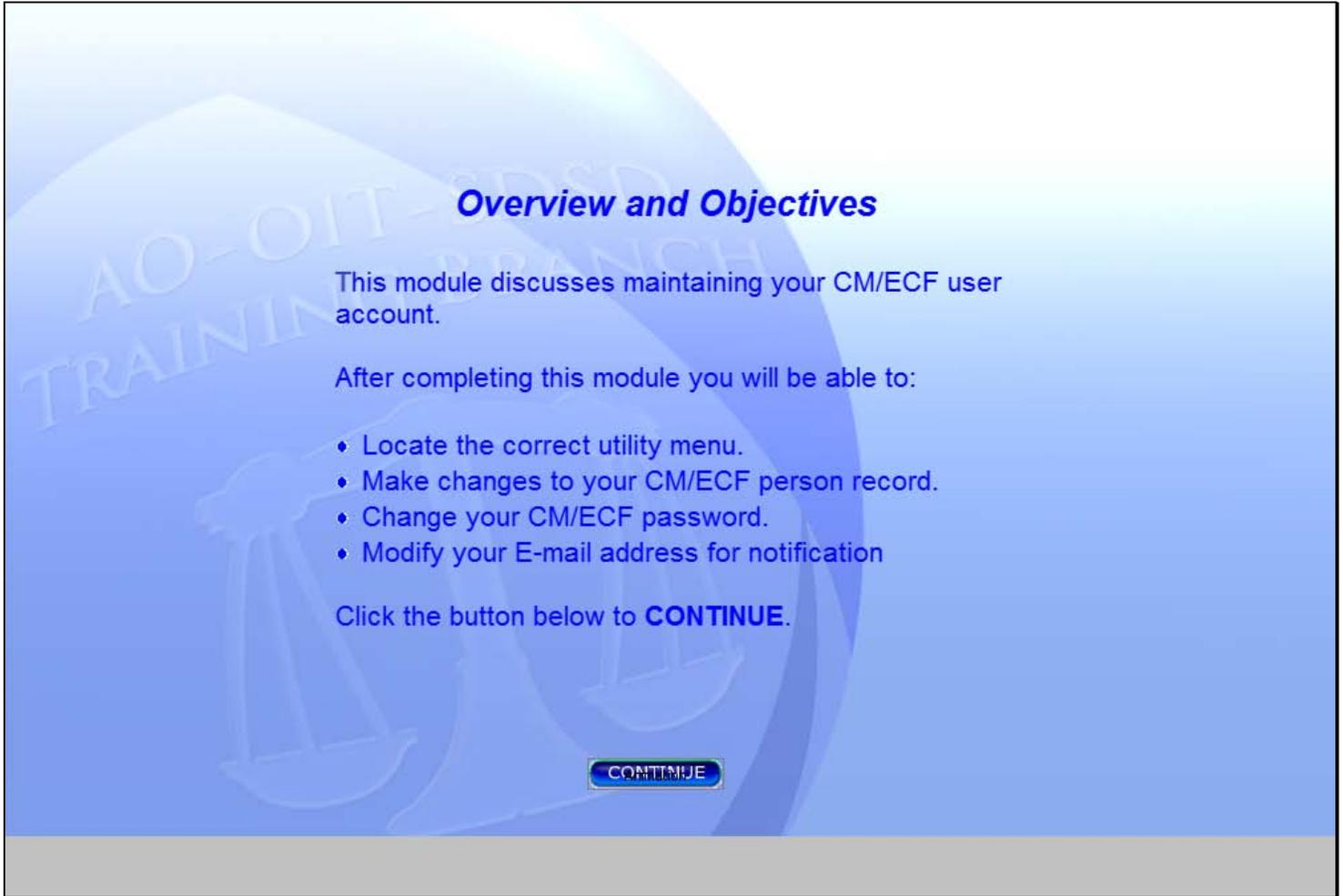
Begin the Lesson: Click the **START** button when you are ready to begin.



Slide notes

Take a moment and review the navigation instructions on this screen. When you are ready to begin, click START.

Slide 3 - Objectives



Overview and Objectives

This module discusses maintaining your CM/ECF user account.

After completing this module you will be able to:

- Locate the correct utility menu.
- Make changes to your CM/ECF person record.
- Change your CM/ECF password.
- Modify your E-mail address for notification

Click the button below to **CONTINUE**.

CONTINUE

The slide features a blue gradient background with a large, faint watermark of a scale of justice and the text 'AO-OIT-SPSD TRAINING BRANCH'.

Slide notes

At the completion of this simulation you will be able to locate the correct utility event. You will understand the changes that can be made to your CM/ECF person record which will include changing your password and maintaining your E-mail addresses for notification. Click CONTINUE.

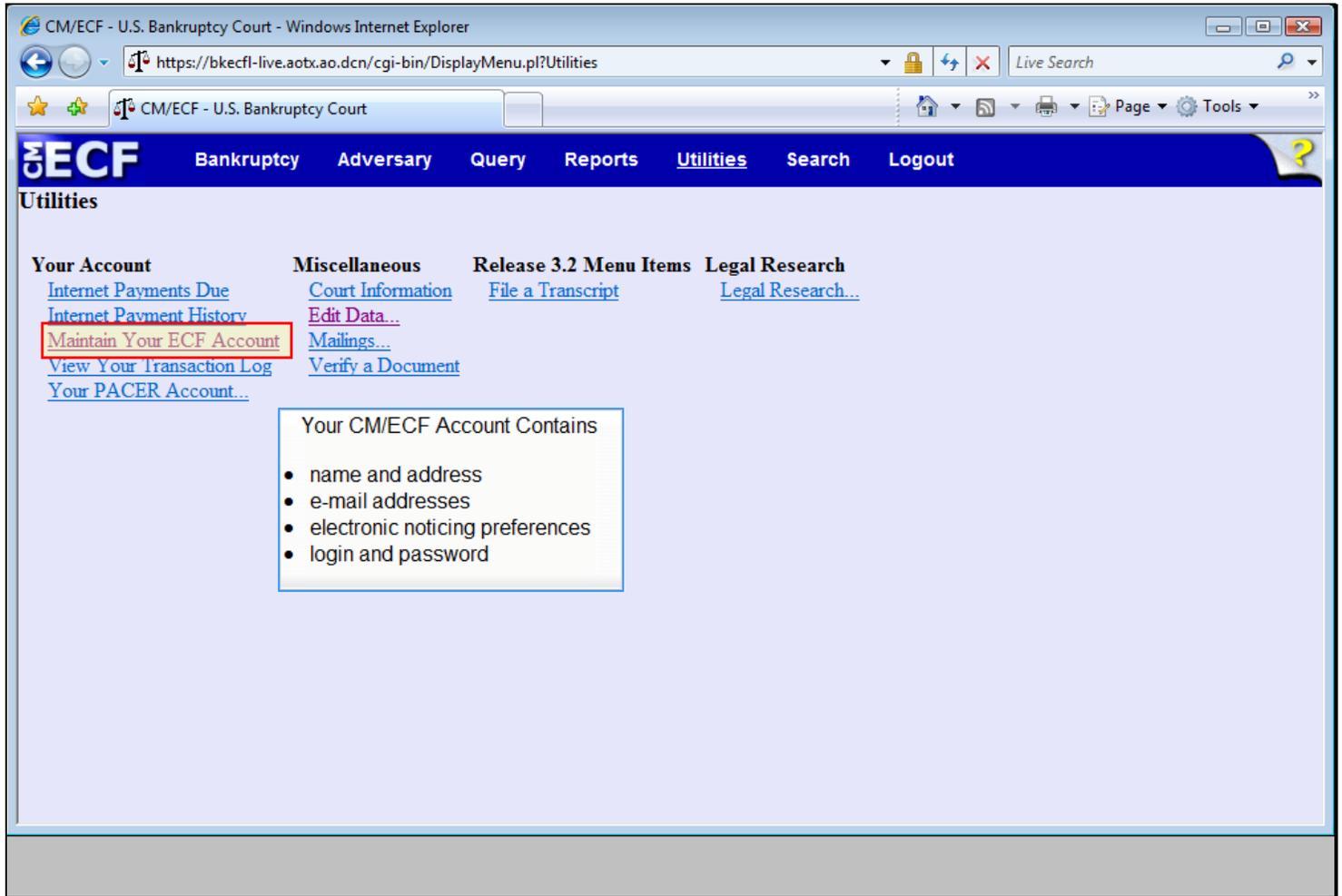
Slide 4 - Slide 4



Slide notes

After you have successfully logged into CM/ECF, menus for each category of action are displayed on a blue menu bar at the top of the screen. To access your CM/ECF user account, click Utilities.

Slide 5 - Event Selection



Slide notes

A list of typical Utility Events displays on this screen. Each CM/ECF user has a personal record in the database under Maintain Your ECF Account. No other users can access this information unless they use your login and password. This account contains your name and address, e-mail addresses, electronic noticing preferences and login and passwords. Your court controls how much access you are given to maintain your record and may restrict some of the actions that we will now describe. To begin the process of editing your ECF account information, click "Maintain Your ECF Account."

Slide 6 - Person Record Main Screen

CM/ECF - U.S. Bankruptcy Court - Windows Internet Explorer
https://bkecf-live.aotx.aocdn/cgi-bin/atty_util.pl

ECF Bankruptcy Adversary Query Reports Utilities Search Logout

Maintain User Account

Last name Walker First name George
Middle name T. Generation
Title Type aty
Office Walker, Meyers, and Brown Add Headers to PDF Documents
Address 1 4456 Central Ave. #476
Address 2
Address 3
City San Antonio State TX Zip 78239
Country County Bexar
Phone 210-657-1235 Fax
SSN / ITIN Tax ID / EIN
Bar ID TX33467 Bar status Active Mail group
Initials DOB AO code Person end date

Email information... More user information...
Submit Clear

Click More user information.

Slide notes

Information from this screen appears on mailing addresses for noticing. Additionally, this information is used on the caption of the docket sheet if you are counsel to principal parties on a case such as debtors, plaintiffs and defendants. It is critical to keep this information current and accurate. Most of the fields available to you for updates are self explanatory, but I'll mention some things you may not be aware of.

The office field is significant for attorneys. This information appears on notices, the docket report caption and in some courts, the docket text when the attorney for the filer is included. If an attorney changes firms it is important to notify the court for guidance in updating your user account and case records.

There is only one master address record for each user and it should be kept up to date. Some courts assign a separate user record to an attorney with two different offices. It is also possible to modify your address at a case level. This alternate address for a case will override the master record for that case only. Ask your court for assistance regarding alternate addresses.

Country, county, SSN/ITIN, and Tax Id are not required for attorney records. The remaining fields on the screen beginning with State Bar ID are maintained by the court.

You will always see "aty" as the type of user. Attorneys who also serve the court as trustees will have a different user record with a different login when filing pleadings in the capacity as a trustee. The type field in a trustee user record will display "tr".

The check box next to Add Headers to PDF Documents controls your ability to view and print PDF headers on documents. To change your password, click "More user information."

Slide 7 - More user information screen.

The screenshot shows a web browser window titled "CM/ECF - U.S. Bankruptcy Court - Windows Internet Explorer". The address bar contains the URL "https://bkecf-live.aotx.aocdn/cgi-bin/atty_util.pl?844158006076378-L_159_0-1". The page header includes the ECF logo and navigation links: "Bankruptcy", "Adversary", "Query", "Reports", "Utilities", "Search", and "Logout".

The main content area is titled "More User Information for George T. Walker". It displays the following information:

- Login:** gwalker
- Password:** *****
- Registered:** Y
- Internet Credit Card:** Y
- Groups:** Attorney
- Last login:** 04-14-2009 17:03
- Current login:** 04-17-2009 17:03
- Create date:** 08/03/2006
- Update date:** 07/17/2008

At the bottom of the form, there are two buttons: "Return to Account screen" and "Clear".

A "Things to Remember" box contains the following instructions:

- password is case sensitive
- may contain up to 8 alpha/numeric characters
- do not use special characters - \$%^&*+ \

Slide notes

This screen chronicles your account login and password record. To change the existing password, simply delete the asterisks and enter a new password. Remember, your password is case sensitive and may contain up to 8 alpha/numeric characters. Do not use special characters. Once the password is entered and saved, the display will be converted to asterisks. You will not be able to retrieve your password, so record it in a secure place.

The system tracks the date and time for each user's activity. The Create date indicates when your login was added to the system. The Update date is the latest date this password has been changed. The Register field is not used in CM/ECF. The Internet Credit Card field shows if this attorney participates in the Internet Credit Card program. All attorneys belong to the same attorney permissions group that controls access to various programs in the system.

A password change will not be recorded until you click "Return to Account screen" and then click Submit on that subsequent screen. In this exercise we will not make a password change. Click "Return to account screen."

Slide 8 - Slide 8

CM/ECF - U.S. Bankruptcy Court - Windows Internet Explorer
https://bkecf-live.aotx.ao.dcn/cgi-bin/atty_util.pl

CM/ECF - U.S. Bankruptcy Court

ECF Bankruptcy Adversary Query Reports Utilities Search Logout

Maintain User Account

Last name Walker First name George
Middle name T. Generation
Title Type aty
Office Walker, Meyers, and Brown Add Headers to PDF Documents
Address 1 4456 Central Ave. #476
Address 2
Address 3
City San Antonio State TX Zip 78239
Country County Bexar
Phone 210-657-1235 Fax
SSN / ITIN Tax ID / EIN
Bar ID TX33467 Bar status Active Mail group
Initials DOB AO code Person end date

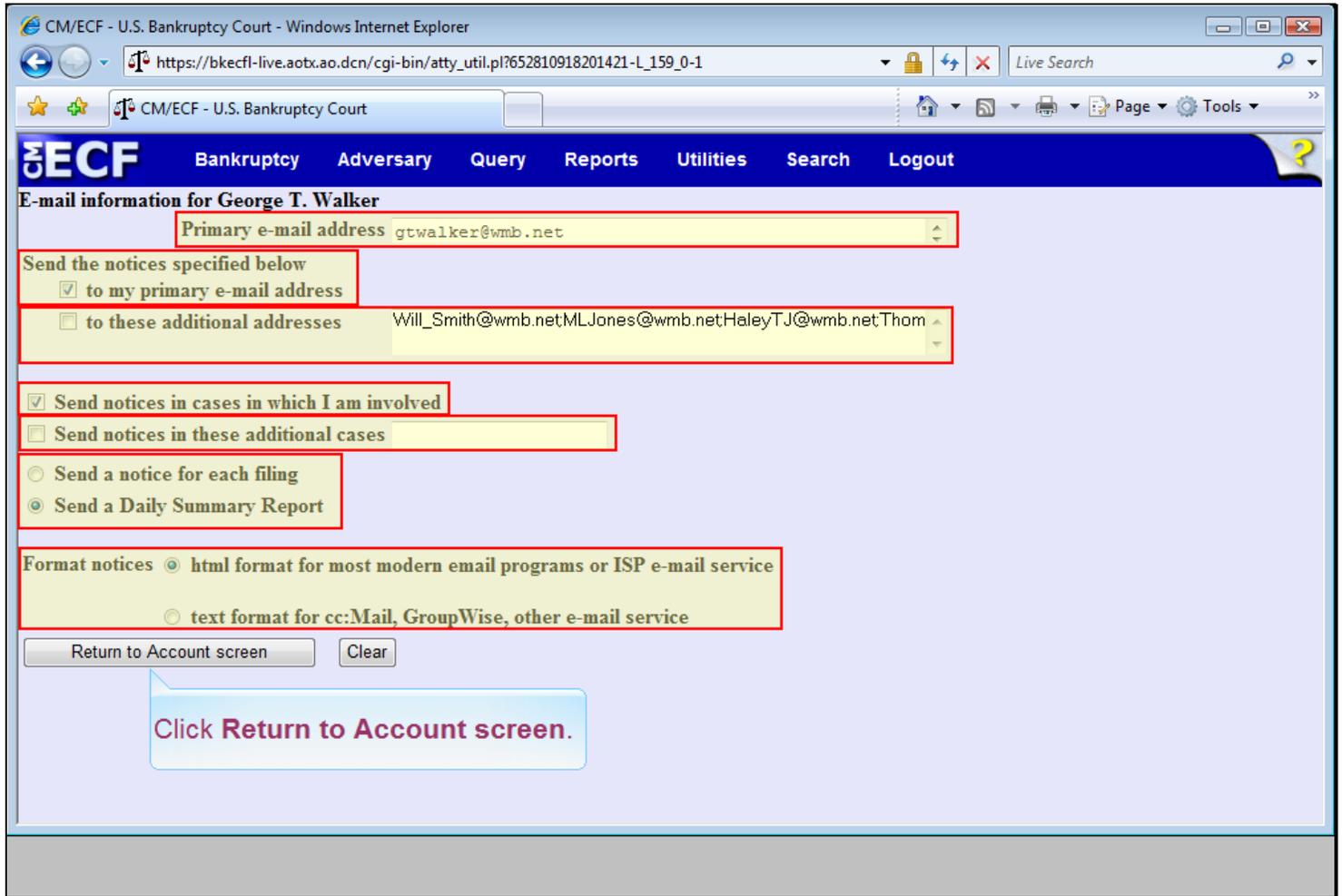
Email information... More user information...
Submit

Click Email information.

Slide notes

Next, we'll look at the e-mail information screen. Click E-mail information.

Slide 9 - E-mail information screen



Slide notes

E-mail addresses and preferences for Notices of Electronic Filing are set on this screen. Enter your "Primary e-mail address" and activate noticing by clicking the box next to "to my primary e-mail address". Click the box in front of "to these additional addresses" to add secondary E-mail addresses. There is no limit to the number of e-mail addresses you can enter. Separate multiple addresses with semicolons.

Each e-mail address recipient listed here is entitled to one free look at the PDF document on the Notice of Electronic Filing. This free look expires after 15 days from the date of the notice. Clicking the box next to "Send notices in cases in which I am involved" will automatically send a Notice of Electronic Filing in cases where you are a participant. To choose to be notified of activity in cases that you are interested in but are not a party to the case, check the box for "Send notices in these additional cases." Enter these case numbers in the field provided. A new field will appear after each entry for multiple cases. Recipients of these notices will be billed by PACER if they click on the document hyperlink since they are not parties to the case.

"Send a notice for each filing" means you will receive e-mail notices as activity occurs throughout the day. This includes notifications for claims. As an alternative, many attorneys elect to receive the Daily Summary Report once a day. The text of the summary e-mail notification will display the case number, docket event description and the document number hyperlink. Only one of these options is allowed. The "Format notices" section allows you to select your e-mail delivery method. For most users the "Format Notices" selection should be the html format. To save this data, Click "Return to Account screen."

Slide 10 - Slide 10

CM/ECF - U.S. Bankruptcy Court - Windows Internet Explorer
https://bkecf-live.aotx.aocdn/cgi-bin/atty_util.pl

ECF Bankruptcy Adversary Query Reports Utilities Search Logout

Maintain User Account

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SSN / ITIN Tax ID / EIN
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DOB AO code Person end date

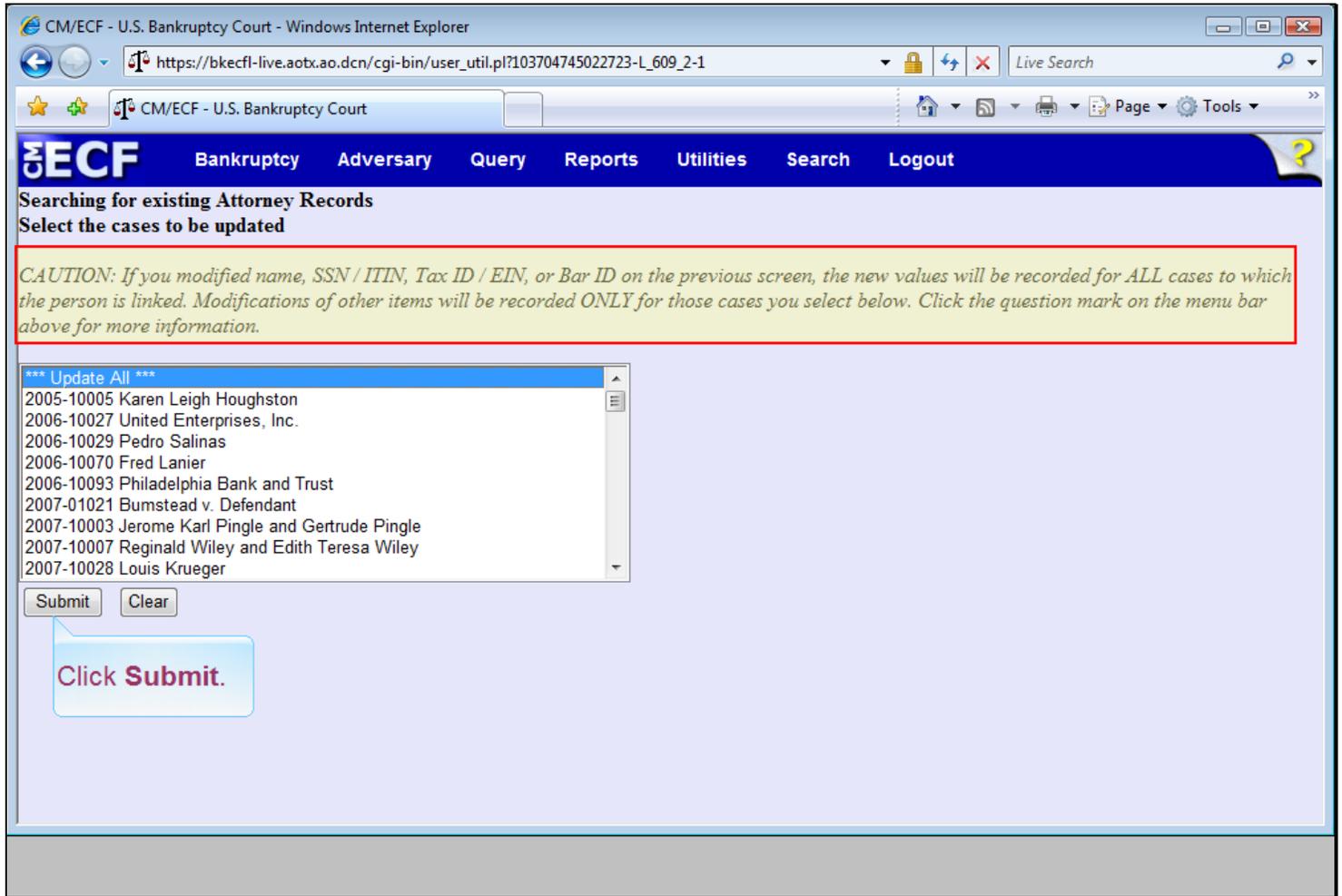
Click Submit.

Submit Clear

Slide notes

If changes are made to any of the user data, you will be given an opportunity on the next screen to indicate which cases the changes apply to. Allow me to make a change to the address of George T. Walker. After the change is made, click Submit.

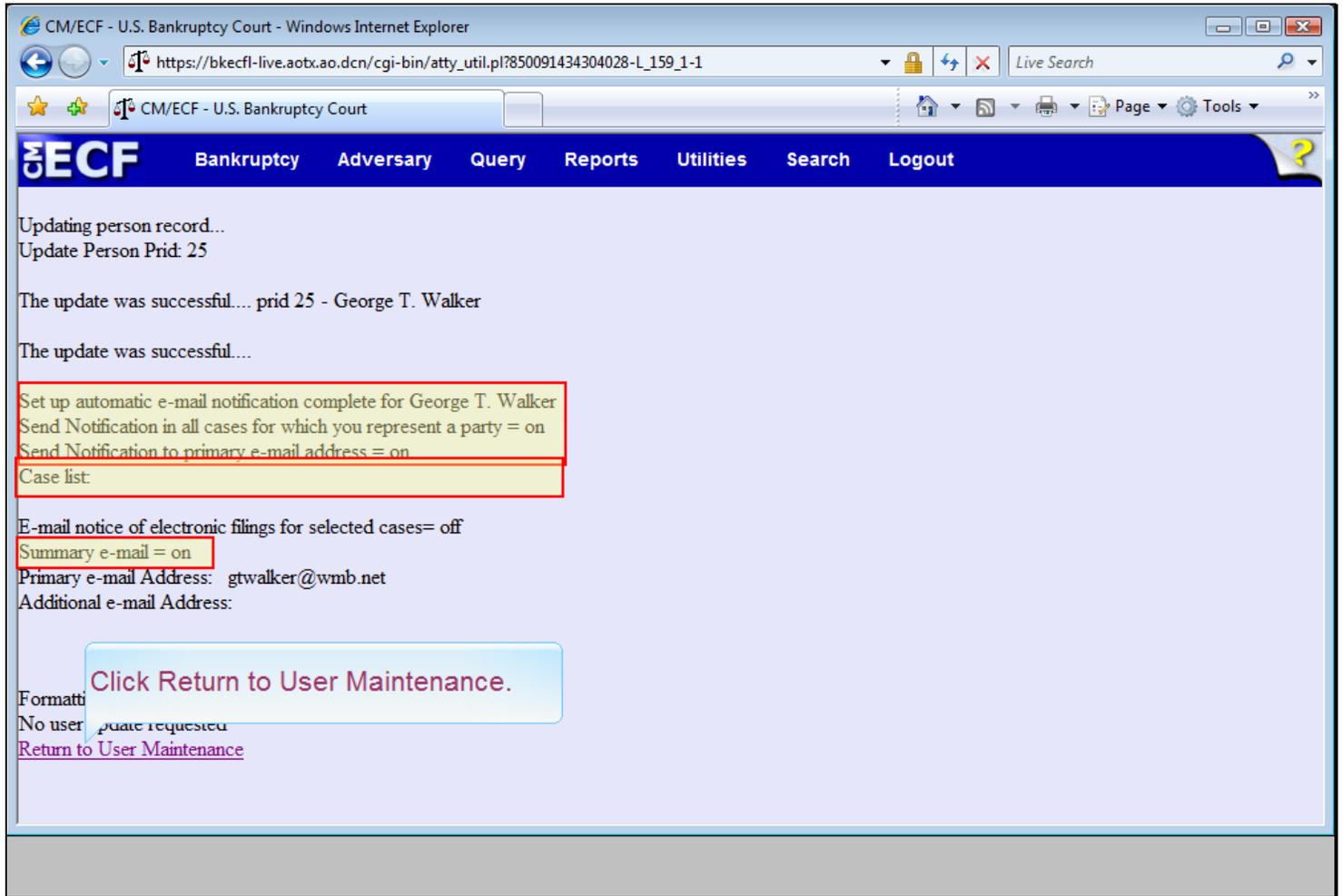
Slide 11 - Cases to be updated



Slide notes

The system now displays a list of all this attorney's cases. Modifications to any of the items mentioned in the CAUTION statement will update ALL cases. For other changes, most courts have their attorneys select the default, which is "Update All." Check with your court for guidance here. Click Submit.

Slide 12 - Data Verification Screen



Slide notes

This data verification screen now shows the settings for this attorney. If you checked any of the boxes for sending notices for each filing, or sending a Daily Summary report, this screen will indicate the option is turned "on." Any additional case numbers (and hyperlinks) will be displayed under the Case list: heading. Click "Return to User Maintenance."

Slide 13 - Slide 13

CM/ECF - U.S. Bankruptcy Court - Windows Internet Explorer
https://bkecf-live.aotx.aoc.dcn/cgi-bin/atty_util.pl

CM/ECF - U.S. Bankruptcy Court

ECF Bankruptcy Adversary Query Reports Utilities Search Logout

Maintain User Account

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Address 2
Address 3
City San Antonio State TX Zip 78239
Country County Bexar
Phone 210-657-1235 Fax
SSN / ITIN Tax ID / EIN
Bar ID TX33467 Bar status Active Mail group
Initials DOB AO code Person end date

Email information... More user information...
Submit Clear

Click **CONTINUE.**

CONTINUE

Slide notes

This concludes the module on Maintaining Your ECF Account. Click CONTINUE.

Slide 14 - Summary

Summary

This concludes the simulation on Maintaining your ECF Account.

You should now be able to:

- Locate the correct utility menu.
- Make changes to your CM/ECF person record.
- Change your CM/ECF password.
- Modify your E-mail address for notification

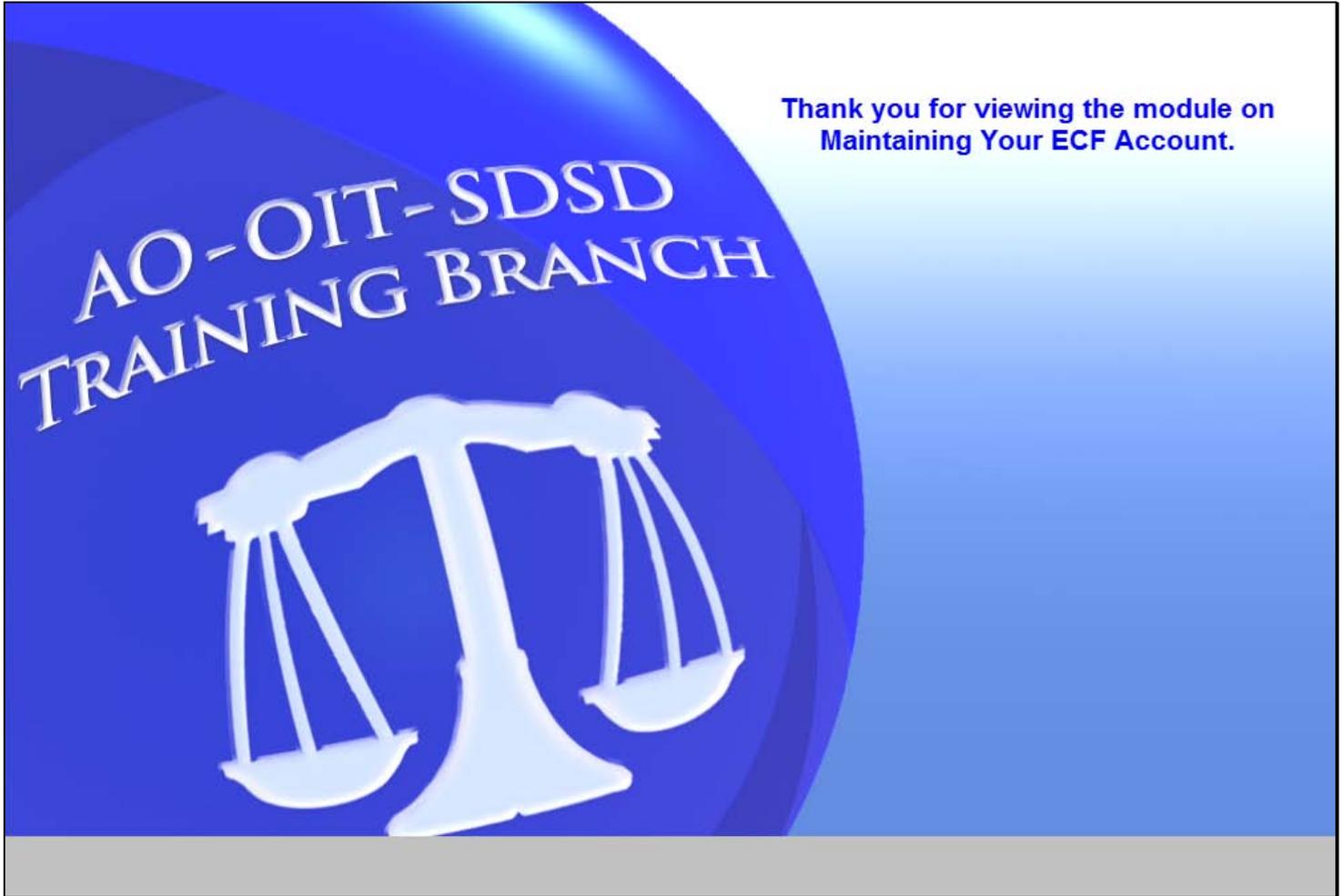
Use the playback controls or Menu options to view previous screens or close this module by clicking the EXIT button.

EXIT

Slide notes

During this simulation you located the correct utility event. You should now have an understanding of the changes that can be made to your CM/ECF person record which includes changing your password and maintaining your E-mail addresses. Use the playback controls or Menu options to view previous screens or close this module by clicking the EXIT button.

Slide 15 - Exit



Slide notes

Thank you for viewing the module on Maintaining Your ECF Account.