

CM/ECF

Maintain User Accounts

For Trustees and Attorneys

All CM/ECF users will be issued an account with a user login and password. The CM/ECF login provides registered users the ability to submit pleadings electronically to the court. Public users (attorneys, trustees, and creditors) must also log into PACER to inquire on cases or look at reports. Existing PACER logins and passwords will be accepted.

Non-court users can access their own account information through the Maintain Your ECF Account menu. Using this option, participants can update their name, mailing and E-mail addresses, phone and fax numbers, and password. Users can therefore control the accuracy of their own information in a timely manner.

This module explains how attorneys and trustees can update:

- ◆ user name, address and other party data
- ◆ E-mail information
- ◆ electronic noticing preferences
- ◆ user login and passwords.

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

STEP 1 After clicking on **Utilities** on the CM/ECF Main Menu bar, select Maintain Your ECF Account, which is found under the **Your Account** sub-menu. (See Figure 1.) Your UTILITIES screen may vary from the one displayed in this example.



Figure 1

STEP 2 Your user account screen will appear displaying your current account information. (See Figure 2.)

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

Maintain User Account

Last name First name

Middle name Generation

Title Type

Office

Address 1

Address 2

Address 3

City State Zip

Country County

Phone Fax

SSN Tax Id

Bar Id 1232546 Bar status Active Mail group

Initials dlw DOB AO code End date

Figure 2

- ◆ Update your personal information on this screen. When it is correct, click **[Submit]** to save the changes. If the **[Submit]** button is not used, the record will not be modified.
- ◆ The **[Email information...]** and **[More user information]** buttons provide further screens to modify your user profile. The following pages will explain these features in more detail.

STEP 3 The E-MAIL INFORMATION screen presents options for control of your electronic notification on each court's CM/ECF system. (See Figure 3.)

The screenshot shows a web interface for managing email preferences. At the top, there is a navigation bar with 'ECF' logo and links for 'Bankruptcy', 'Adversary', 'Query', 'Reports', 'Utilities', and 'Logout'. The main heading is 'E-mail information for D.L. Wilson'. Below this, there is a text input field for 'Primary e-mail address' containing 'DLWilson@lawfirm.net'. Underneath, there are two checkboxes: one checked for 'to my primary e-mail address' and one unchecked for 'to these additional addresses'. Further down, there are two more checkboxes: one checked for 'Send notices in cases in which I am involved' and one unchecked for 'Send notices in these additional cases'. Below these are two radio buttons: one selected for 'Send a notice for each filing' and one unselected for 'Send a Daily Summary Report'. At the bottom of the form, there are two radio buttons for 'Format notices': one selected for 'html format for Netscape or ISP e-mail service' and one unselected for 'text format for cc:Mail, GroupWise, other e-mail service'. At the very bottom, there are two buttons: 'Return to Account screen' and 'Clear'.

Figure 3

You can request e-mail copies of notification on all cases to which you are a party or only on specific cases. You can receive e-mail activity throughout the day or a daily summary of all noticing activity. "All activity" includes notification of claims as well as other entries to a case.

Each e-mail will include the case number and name of the docket entry in the subject line of the mail message.

Each section on the E-MAIL INFORMATION screen is explained below:

- ◆ **Primary E-mail address.** This address must be formatted to Internet protocol or an error will be generated. It may be prudent to establish a separate E-mail account for CM/ECF activity from your routine E-mail correspondence.

◆ **Send the notices specified below...**

to my primary E-mail address

To activate CM/ECF notification you must first check the box next to your E-mail address.

to these additional addresses

You may have notices sent to other E-mail addresses besides your primary E-mail address. (Paralegals or chambers staff may want to share this notification activity.) When entering multiple E-mail addresses, separate each address with a semi-colon.

Send notices in cases in which I am involved

Checking this box will automatically inform the user when any filing has been submitted in a case where this person is a participant. Chapter 7 panel trustees and offices of the U.S. Trustee may find this advantageous for new filings as well as routine case activity.

Send notices to these additional cases

You do not have to be a participant in a case to receive notification of activity. Trustees and attorneys can elect to be notified of activity in cases in which they have an interest but are not parties to the case. Court and chambers staff can monitor cases through this process also. It is possible to select both options.

NOTE: This list is maintained by each user. As you are involved in more cases or as cases close, you must update this screen.

◆ **Send a notice for each filing.**

Checking this box means you will receive E-mail notices when activity occurs throughout the day to the account(s) specified above. The title of the E-mail will describe the type of filing and the case number.

◆ **Send a Daily Summary Report**

A comprehensive list of one day's activity can be sent once a day. Notifications for claims will also be included in this mail list. (See Figure 3a.)

A Summary report includes the case numbers and titles of cases in which activity occurred for that day. The text of the Summary E-mail notification will display the docket event and the document number (including the hyperlink).

NOTE: You cannot elect to receive both separate notices and the summary report.

Bruce Williams	11/26/2001	8511	Summary of ECF Activity
----------------	------------	------	-------------------------

99-11228-lmc Michael Holdman and Wendall Holdman Notice of Appearance	5
5-01-50021-lmc John Adams and Mary Adams Proof of Claim Filed	1
5-01-50021-lmc John Adams and Mary Adams Proof of Claim Filed	2

Figure 3a

- ◆ **Format notices**
Enter the E-mail delivery method. This selection will be determined by your E-mail type.
 - **html format for Netscape or ISP E-mail servicer**
The html format will include hyperlinks to the document or claim. (See Figure 3b.)

Notice of Electronic Filing
The following transaction was received from Clarence I. Longsdale entered on 9/5/2002 at 9:40 AM CDT and filed on 9/5/2002 CDT
Case Name: Dale I Danniels
Case Number: 99-10009
Document Number: 14
Docket Text: Objection to Claim Filed by Debtor Dale I Danniels . (Wilson, Joe)

Figure 3b

- **text format for cc:Mail, GroupWise, other E-mail service**
Text format will feature the URL of the PDF document which can be copied and pasted into the location bar of your browser.

Figure 3c shows an example of a text formatted notice.

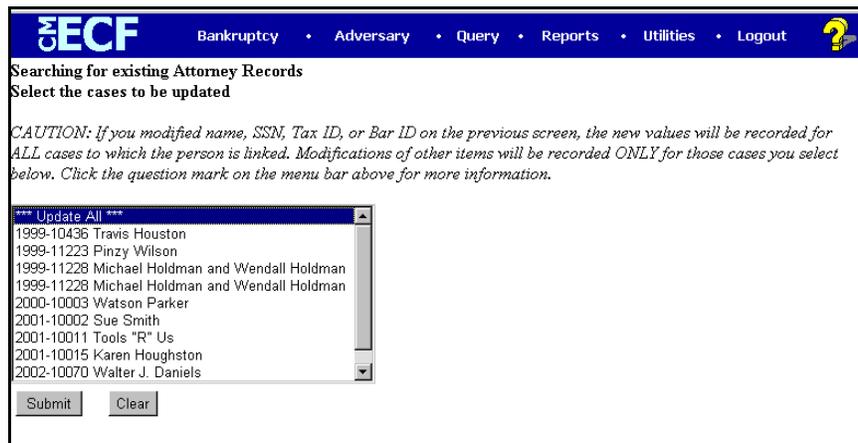
Notice of Electronic Filing
The following transaction was received from Abraham P. Bellows on 1/23/2001 at 3 :51 PM CST

Case Name: William Wonka
Case Number: 97-13259 [https://bkecf-train.aottd.uscourts.gov/cgi-bin/DktRpt.pl? 252](https://bkecf-train.aottd.uscourts.gov/cgi-bin/DktRpt.pl?252)
Document Number: 2
Copy the URL address on the line below into the location bar of your Web browser to view the document: [https://bkecf-train.aottd.uscourts.gov/cgi-bin/show_case_doc?2,252,,169281,](https://bkecf-train.aottd.uscourts.gov/cgi-bin/show_case_doc?2,252,,169281)

Figure 3c

- ◆ When you have entered your E-mail preferences, click on **[Return to Account screen]**.
- ◆ Click on **[Submit]** to save the changes.

STEP 4 The **SELECT THE CASES TO BE UPDATED** screen will then appear for the user to select the effected cases. (See Figure 4.)



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

Searching for existing Attorney Records
Select the cases to be updated

CAUTION: If you modified name, SSN, Tax ID, or Bar ID on the previous screen, the new values will be recorded for ALL cases to which the person is linked. Modifications of other items will be recorded ONLY for those cases you select below. Click the question mark on the menu bar above for more information.

*** Update All ***

- 1999-10436 Travis Houston
- 1999-11223 Pinzy Wilson
- 1999-11228 Michael Holdman and Wendall Holdman
- 1999-11228 Michael Holdman and Wendall Holdman
- 2000-10003 Watson Parker
- 2001-10002 Sue Smith
- 2001-10011 Tools "R" Us
- 2001-10015 Karen Houghston
- 2002-10070 Walter J. Daniels

Submit Clear

Figure 4

NOTE: Modifications to NAME, SSN, TAX ID, or BAR ID will automatically update ALL cases.

- ◆ Select desired cases and then click **[Submit]**.

The screen in **Figure 4a** is used to confirm the information which

has been submitted. If you checked any of the boxes for sending notices for each filing, or sending a 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. If invalid case numbers were entered, you will receive an error message after submitting the data and be given the chance to back up and enter a valid number.

The screenshot shows the CM/ECF user interface with a blue header containing navigation links: Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. The main content area displays the following information:

- Updating person record...
- Update Person Prid: 333454
- The update was successful... prid 333454 - D.L. Wilson
- The update was successful...
- Set up automatic e-mail notification complete for D.L. Wilson
- Send Notification in all cases for which you represent a party = on
- Send Notification to primary e-mail address = on
- Case list:
 - [99-11223 Pinzy Wilson](#)
 - [99-11225 Timothy Tisdale and Barbara Tisdale](#)
- E-mail notice of electronic filings for selected cases= on
- Summary e-mail = off
- Primary e-mail Address: DLWilson@lawfirm.net
- Additional e-mail Address:

Figure 4a

STEP 5 If you click on **More user information** from your account screen, your login and password information will be displayed (See Figure 5.)

The screenshot shows the 'More User Information for D.L. Wilson' screen. It displays the following details:

- Login:** wilsondl
- Password:** [masked]
- Prid:** 333454
- Registered:** Y
- Internet Credit Card:** [unchecked]
- Groups:** Attorney
- Last login:** 09-05-2002 13:19
- Current login:** 09-05-2002 13:19
- Create date:** 06/04/2001
- Update date:** 11/15/2001

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

Figure 5

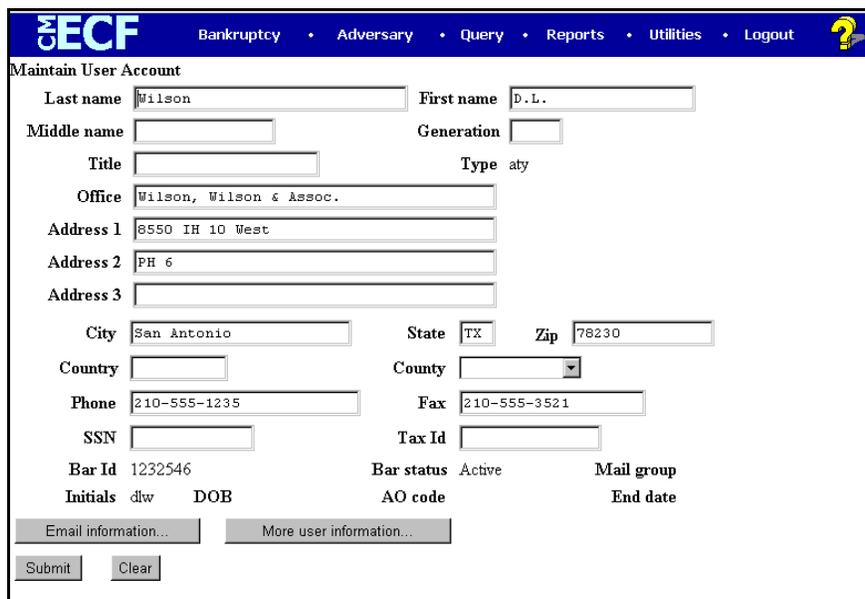
◆ You can change your own login and/or password here.

Remember:

- Logins and passwords are case sensitive.
- These are alphanumeric fields
- Passwords have a maximum of 8 characters
- When you enter a new password it is displayed on the screen. Your subsequent queries to this screen will show only asterisks.
(No one will be able to tell you what your password is. Contact the court if you forget your password.)

- ◆ When you have entered the information as desired, click on **[Return to Account screen]**.

STEP 6 Your user account screen will appear again (See Figure 6.)



The screenshot shows a web browser window with a blue header containing the 'ECF' logo and navigation links: Bankruptcy, Adversary, Query, Reports, Utilities, Logout, and a help icon. The main content area is titled 'Maintain User Account' and contains the following fields:

Last name	Wilson	First name	D.L.
Middle name		Generation	
Title		Type	aty
Office	Wilson, Wilson & Assoc.		
Address 1	8550 IH 10 West		
Address 2	PH 6		
Address 3			
City	San Antonio	State	TX
		Zip	78230
Country		County	
Phone	210-555-1235	Fax	210-555-3521
SSN		Tax Id	
Bar Id	1232546	Bar status	Active
Initials	dhw	DOB	
		AO code	
		Mail group	
		End date	

Below the fields are two buttons: 'Email information...' and 'More user information...'. At the bottom are 'Submit' and 'Clear' buttons.

Figure 6

- ◆ When all of your account information is correct, click **[Submit]** to

finish processing.

STEP 7 A list of the cases you are associated with will then appear
(See Figure 7.)

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

Searching for existing Attorney Records
Select the cases to be updated

CAUTION: If you modified name, SSN, Tax ID, or Bar ID on the previous screen, the new values will be recorded for ALL cases to which the person is linked. Modifications of other items will be recorded ONLY for those cases you select below. Click the question mark on the menu bar above for more information.

*** Update All ***
1999-10436 Travis Houston
1999-11223 Pinzy Wilson
1999-11228 Michael Holdman and Wendall Holdman
1999-11228 Michael Holdman and Wendall Holdman
2000-10003 Watson Parker
2001-10002 Sue Smith
2001-10011 Tools "R" Us
2001-10015 Karen Houghston
2002-10070 Walter J. Daniels

Submit Clear

Figure 7

- ◆ If you want this new information to apply to all of the cases, click on *****Update All***** at the top of the list. To change information only on certain cases, hold down the **[Control]** key after selecting the first case number and click on the others, one at a time, to highlight them.
- ◆ When you have all of the desired cases or *****Update All***** highlighted, click **[Submit]** to apply the new information.
- ◆ The system will update the records and inform you that they were updated. You can then click on another selection in the **CM/ECF Main Menu Bar**.

NOTE: Modifications to NAME, SSN, TAX ID, or BAR ID will automatically update ALL cases.

USER TRANSACTION LOG

All docketing activity is recorded through each user's **User Transaction Log**. This feature is found under Utilities on the CM/ECF Main Menu Bar. Information on this log can be selected by date range. A typical excerpt from a transaction log is displayed below. (See Figure 8.)

 Bankruptcy • Adversary • Query • Reports • Utilities • Logout 			
Transaction Log			
Report Period: 08/28/2000 - 09/05/2002			
Id	Date	Case Number	Text
0	08/22/2002 09:23:54	1-02-bk-10070	First Meeting of Creditors with 341(a) meeting to be held on 09/20/2002 at 01:30 PM at Room 101 U.S. Trustee's Office. Objections for Discharge due by 11/19/2002. (Wilson, D.L.)
6562	06/04/2001 10:33:48	01-10002	Opened New BK Case 01-10002
7509	08/02/2001 09:55:35	01-10015	Opened New BK Case 01-10015
7514	08/02/2001 09:56:38	01-10015	Motion to Avoid Lien with <i>Landry Restaurant Supply</i> Filed by Karen Houghston. (Wilson, D.)
7524	08/02/2001 10:08:14	01-10015	Stipulation By Karen Houghston and Between Landry Restaurant Supply filed by Karen Houghston. (Wilson, D.)
7526	08/02/2001 10:11:46	01-10015	Motion to Withdraw as Attorney Filed by Karen Houghston. (Wilson, D.)
11638	08/02/2002 16:38:07	02-40006	Opened New BK Case 02-40006
12185	08/20/2002 15:21:40	02-10070	Opened New BK Case 02-10070
12342	08/22/2002 10:19:13	1-02-bk-10070	Application to Pay Filing Fee in Installments Filed by Debtor Walter J. Daniels (Wilson, D.L.)

Figure 8

This record may be useful in researching case filings. Dates, case numbers, times and document type are tracked.

Your transaction activity is not accessible to other users besides yourself except for court systems staff.