

Introduction

This document summarizes the changes you will notice when CM/ECF is updated to Release 5.0. The titles in **red** indicate what differences you will see based upon the type of user you are.

Internet Browsers - **ALL USERS**

- Release 5.0 was tested and works correctly with Firefox 3.16.18, Internet Explorer 8 and 9 and Safari 5.1.
- Previously, when a user uploaded a document using the Mozilla Firefox browser, the file upload dialog box defaulted to display only “Image Files”. To avoid confusion and save time, this has been modified so that the “All Files” value is selected by default, rather than the “Image Files” value.

Bankruptcy Case Opening – **ATTORNEYS**

- CM/ECF now allows up to five social security numbers and tax identification numbers for each debtor and joint debtor. On screens where a new party may be added, if the party is a debtor or joint debtor, a “plus” icon appears beside the SSN/ITIN and TaxID/EIN fields when they contain a value. If the debtor or joint debtor has another SSN/ITIN or TaxID/EIN, click the “plus” icon for another field to display for additional numbers to be entered. CM/ECF will also now format the numbers if you do not insert hyphens.

Debtor Information			
Last name	Smith	First name	James
Middle name		Generation	
SSN/ITIN	999-99-9999	Title	
	999-99-9999	Tax Id/EIN	12-1234567
	999-99-9990		

- All SSN/ITIN and TaxID/EIN numbers have been included in all reports and functions through CM/ECF.
- On public notices and docket sheets, only the last four digits are displayed.

Case Upload – **ATTORNEYS**

- The **Case Upload** module now accepts multiple identification numbers as a comma-separated list in the SSN/ITIN and TaxID/EIN fields.
- Previously, if a specific letter combination appeared in the first line of the text file, the file validation program incurred an error. This has been corrected.
- Previously, when certain third-party upload software packages were used, the certificates of credit counseling were not docketed upon case upload. This has been corrected.

Docketing – Party/Attorney Associations – ATTORNEYS

- When an attorney files a document in a case in which he or she is not already involved, the user is prompted to indicate whether the attorney should be linked to the party. Previously, the default behavior was for the system to not link the attorney. Now, the association is made unless the user de-selects the check box. A message has been added to stress the implications of not creating an association.

IMPORTANT: The following attorney/party association(s) will be created in this case. De-selecting a party association will result in the filing attorney NOT receiving Notices of Electronic Filing for that party. If this is a joint filing, review the list carefully to ensure that only parties represented by the filing attorney are selected.

GMAC, (cr:cr) represented by Wilkinson, Emma (aty)

- If the box is unchecked, the attorney will not be added to the case for noticing. The attorney will also not appear on or receive the Notice of Electronic Filing.

Query - ALL USERS

Search Clues

- Additional options have been added to the Query search screen.

Query

Warning: you will be billed for the total number of pages (this report is not subject to the 30-page limit on PACER charges).

Search Clues

Case Number

Last / Business Name (Examples: Desoto, Des*t)

First Name Middle Name

SSN / ITIN Tax ID / EIN

Type Open cases Closed cases

Filed Date to

Last Entry Date to

Nature of Suit (AP and MP cases only)

- 01 (Determination of removed claim or cause)
- 02 (Other (e.g. other actions that would have been brought in state court if unrelated to bankruptcy))
- 11 (Recovery of money/property - 542 turnover of property)
- 12 (Recovery of money/property - 547 preference)

- The Filed Date and Last Entry Date range is limited to 31 days. If the date range entered exceeds the 31 day limit, CM/ECF will display an error message.
- If multiple Nature of Suits are selected for a query, CM/ECF will display a message that the search could produce many records and lead to a large billing charge. This message allows users to proceed with the search or cancel it.

Notice of Bankruptcy Case Filing

- Previously, if a case was converted and re-converted, the Notice of Bankruptcy Case Filing query screen reflected the converted chapter rather than the original chapter. Now, for cases filed in Release 5.0, the original chapter will be saved permanently in a new field so the chapter value will be correct on this screen if the case converts and re-converts.

Case Summary

- The original chapter and current chapter will also display on the Case Summary query screen for re-converted cases after Release 5.

Associated Cases

- The Associated Cases query screen now includes a section listing prior cases filed by the same debtor. Previously, this section searched for matching debtors using the CM/ECF person ID. Now, this searches by SSN/ITIN

Reports - ALL USERS

Calendar Events Report

- The hearing type selection "All Hearings" has been changed to now exclude 341 meetings from displaying in the results.

Docket Activity

- The report selection criteria now includes a time range filter. The report can now be run in time increments rather than for the entire day. If no times are entered, the entire day(s) are searched.

Docket Activity Report

Warning: you will be billed for the total number of pages (this report is not subject to the 30-page limit on PACER charges).

Case number Only cases to which I am linked

Office

Case type

Category

Open cases Summary Text
 Closed cases Full Docket Text

Entered to

Sort by

- Previously, the "Only cases to which I am linked" check box displayed only for attorneys. Now this option displays for trustees also.

Cases Report

- Several additional options have been added to the Cases Report selection screen.

- The new **Date Type** selection criteria allows users to search on “Filed Date”, “Entered Date”, “Discharged Date”, “Dismissed Date”, “Closed Date”, “Converted Date”, “Reopened Date”, “Transferred Date”, or “Split Date”.
- External users can now search for cases without a confirmed plan. When searching by unconfirmed plan dates, the 31-day range limit to PACER user searches does not apply for this search.
- A new output format option, “Include field descriptions,” has been added for use when the data-only format is selected. Selecting this option inserts field descriptions into a header row of the data file. The new header row is circled in red in the below image.

(1)Case number - 2-digit year	(2)Case number - 4-digit year	(3) [CM/ECF internal]	(4)Chapter	(5)Previous chapter	(6)Conversion date	(7)Date discharged	(8)Dat
1:13-bk-00006	1:2013-bk-00006	10838 7	bk	ADAMS-PA	Harrisburg	Installation	No
1:13-bk-00006	1:2013-bk-00006	10838 7	bk	ADAMS-PA	Harrisburg	Installation	No
1:13-bk-00008-RNO	1:2013-bk-00008-RNO	10840 13	bk	DeHart, III (Trustee)	Opel	DAUPHIN-PA	Harrisburg
1:13-bk-00008-RNO	1:2013-bk-00008-RNO	10840 13	bk	DeHart, III (Trustee)	Opel	DAUPHIN-PA	Harrisburg
5:13-bk-00007-JJT	5:2013-bk-00007-JJT	10839 7	bk	Oleyar (Trustee)	Thomas	LUZERNE-PA	Wilkes-Barre
5:13-bk-00007-JJT	5:2013-bk-00007-JJT	10839 7	bk	Oleyar (Trustee)	Thomas	LUZERNE-PA	Wilkes-Barre

- CM/ECF now allows debtors and joint debtors to list multiple SSN/ITIN or Tax ID/EIN values. To accommodate this, the Cases Report data-only option lists multiple values separated by commas in field 42 (SSN/ITIN) and field 43 (Tax ID/EIN).

The current fields are as follows:

- Formatted case number with 2-digit year
- Formatted case number with 4-digit year
- [CM/ECF internal]
- If this is a bankruptcy case, the chapter under which it was filed.
- If this is a bankruptcy case that has been converted, the previous chapter.
- If this is a bankruptcy case, the date on which an order of conversion was filed.
- If this is a bankruptcy case, the date on which the case or the first debtor was discharged.
- Date on which the case or the first debtor was dismissed.
- Date on which the case was filed or reopened.
- Date on which the case was entered into CM/ECF.

11. Date on which the case was closed.
12. The disposition code for the case, or for the first debtor in a joint case.
13. Code that identifies the type of case, "ap" = adversary proceeding, "bk" = bankruptcy, "mp" = miscellaneous proceeding.
14. If this is a bankruptcy case, the trustee's last name.
15. Judge's last name
16. If this is a bankruptcy case, the name of the county in which it was filed.
17. The name of the office in which the case was filed.
18. If this is a bankruptcy case, status of filing fee payment: "Paid", "Installment", "IFP Filing Fee Waived", "Installments Completed", "Fee Not Paid", or blank.
19. If this is a bankruptcy case, are there assets in the case? "yes", "no", or blank.
20. If this is a bankruptcy case, the disposition of the case or of the first debtor (e.g., "Discharge granted").
21. If this is a joint bankruptcy case, the discharge date of the joint debtor.
22. If this is a joint bankruptcy case, the dismissal date of the joint debtor.
23. If this is a joint bankruptcy case, the disposition code for the joint debtor.
24. If this is a joint bankruptcy case, the disposition for the joint debtor.
25. If this case is an adversary proceeding, a code for the divisional office in which the bankruptcy case was filed.
26. If this case is an adversary proceeding, the sequence number for the related bankruptcy case.
27. If this case is an adversary proceeding, the year (1 or 2 digits) of the related bankruptcy case.
28. If this case is an adversary or miscellaneous proceeding, its disposition (e.g., "Dismissed for want of prosecution").
29. Party's first name
30. Party's middle name
31. Party's last name
32. Party's generation
33. Party's office or agency
34. 1st line of party's address
35. 2nd line of party's address
36. 3rd line of party's address
37. Party's city
38. Party's state
39. Party's ZIP code
40. Party's country
41. Party's phone
42. Party's Social Security Number(s) (the first 5 characters are masked for public users)
43. Party's Tax ID(s)
44. Sequence number of the party within the case
45. The role of the party in the case
46. The party terminated date, if applicable (debtor, plaintiff and defendant parties only)
47. Short title of the case (omitted when party information is included)
48. Attorney's first name
49. Attorney's middle name
50. Attorney's last name
51. Attorney's generation
52. Attorney's office or agency
53. 1st line of attorney's address
54. 2nd line of attorney's address
55. 3rd line of attorney's address
56. Attorney's city
57. Attorney's state
58. Attorney's ZIP code
59. Attorney's country
60. Attorney's phone

Docket Report – Create Appendix

- The **Create Appendix** selection criteria option has been modified to provide more flexibility in customizing the docket report. Users can select if the PDF documents should be included in the customized report and whether all docket entries should be included or only select entries.

Docket Sheet

Case number: 5:12-bk-12

Filed Entered

Documents: to

Include:

- Terminated parties
- Links to Notices of Electronic Filing
- Page counts for documents

Document options:

- View multiple documents
- Create Appendix**
 - Include on the Docket Sheet:
 - all docket entries in this case
 - selected docket entries only
 - Include PDF documents
(select documents on the next screen)

Format:

- HTML
- Text

Sort by: Oldest date first

- Include on the Docket Sheet - all docket entries in this case** – By default this option is selected. With this option, the full public docket sheet is printed at the beginning of the appendix document. If PDF documents are included, all documents are printed in the appendix after the docket sheet.
- Include on the Docket Sheet – selected docket entries only** – When this option is selected, the docket sheet printed at the beginning of the appendix document includes only the entries selected on the subsequent screen. If PDF documents are included, the documents for the selected entries are printed in the appendix after the docket sheet.
- Include PDF documents** – By default this box is selected so that entries selected on the Docket Sheet screen have associated documents included as part of the appendix document. If this box is unchecked, no documents are printed on the appendix, only the full or abridged docket sheet.

Docket Report – Include Page Counts for Documents

- A new option to include “Page counts for documents” has been added to the selection screen.

Docket Sheet

Case number: 5:12-bk-12

Filed Entered

Documents: to

Include:

- Terminated parties
- Links to Notices of Electronic Filing
- Page counts for documents**

Document options:

- View multiple documents
- Create Appendix
 - Include on the Docket Sheet:
 - all docket entries in this case
 - selected docket entries only
 - Include PDF documents

Format:

- HTML
- Text

Sort by: Oldest date first

When the “Page counts for documents” box is checked, the number of pages displays on the report below the document number. For documents with attachments, the number of documents is displayed as well as the total number of pages. The page numbers for each attachment are still displayed on the Document Selection Menu which is accessed by clicking the document number link.

Filing Date	#	Docket Text
01/19/2012	1 (1 pg)	Chapter 7 Voluntary Petition . Filing fee due in the amount of \$ 306.00 Filed by Joe Snow . (Eshelman, Ryan) (Entered: 01/19/2012)
01/19/2012	2 (3 pgs; 2 docs)	Meeting of Creditors and Notice of Appointment of Trustee Mark J Conway (Trustee), with 341(a) meeting to be held on 02/17/2012 at 12:00 PM at Wm J Nealon Fed Bldg/US Courthouse, room to be determined, Washington & Linden Streets, Scranton, PA. Last day to oppose discharge or dischargeability is 04/17/2012. Financial Management Course due by 04/17/2012. (Eshelman, Ryan) (Entered: 01/19/2012)
02/02/2012	3 (4 pgs; 4 docs)	Motion to Extend Time to Object to Discharge with nonconcurrency. Notice served on 2/2/2012. Filed by Ryan Eshelman on behalf of Joe Snow (RE: related document(s)1). Objections due by 02/26/2012. (Attachments: # 1 Certificate of Service # 2 Notice # 3 Proposed Order) (Eshelman, Ryan) (Entered: 02/02/2012)

Docket Report - Critical Deadlines and Dates

- Additional dates and deadlines now display on the caption of the Docket Report for easier monitoring of critical milestones in the case.

The following dates will be shown if set in the case. The most recent date displays whether it is terminated or not.

- 341 meeting date
- Claims bar deadlines for proof of claims and government proof of claims
- Plan confirmation date
- 523 and 727 complaint deadlines
- Financial management course deadline

FeeDueBK, CREDS, FMDueD, ProSe, MotDism, FeeDueAdP, FeeDueRFS, PlnCnfrmd

U.S. Bankruptcy Court
Middle District of Pennsylvania - TRAIN (Wilkes-Barre)
Bankruptcy Petition #: 5:12-bk-00016-RNO
Internal Use Only

Assigned to: Honorable Robert N Opel II
 Chapter 13
 Voluntary
 Asset
[Show Associated Cases](#)
[Claims Register](#)

Date filed: 01/19/2012
 Plan confirmed: 02/27/2013
 341 meeting: 02/27/2012
 Deadline for filing claims: 05/27/2012
 Deadline for filing claims (govt.): 07/17/2012

Debtor
John D Doe
 Main Office
 P O Box 1
 Tamaqua, PA 18252
 SCHUYLKILL-PA
 SSN / ITIN: 165-80-7222

represented by **John D Doe**
 PRO SE

- If there are claims associated with a case, a link to the Claims Register is displayed in the header along with the case information.
- For cases filed under Release 5 that are converted and re-converted, the original chapter and current chapter will now display on the caption of the Docket Report.

Claims/Creditors - ALL USERS

- During claim filing and creditor maintenance transactions, the final screen before submission now warns that submitting will finalize the transaction.
- The title of the former “Creditor Mailing Matrix” menu item has been changed to “List of Creditors.”
- The title of the former “Upload a creditor matrix file” menu item has been changed to “Upload a list of creditors file.”

Maintain Your ECF Account - ALL USERS

- When an update is submitted, the screens and messages have been modified for clarity, consistency and a reduction in the number of screens and clicks needed.
- A new error message prevents users from entering a pipe (“|”) character in the “Office” field on the main user information screen.

Notice of Electronic Filing and Notice of Electronic Claim Filing – ALL USERS

- Previously when an attorney represented more than one party in a case, the attorney’s email and party information were listed on the Notice of Electronic Filing (NEF) and Notice of Electronic Claim Filing (NEFC) only for the first party. Now, the attorney is listed for each party they represent. Although an attorney may be listed multiple times on an NEF or NEFC, the system does not send multiple emails.
- The “Notice will be electronically mailed to:” section of the NEF and NEFC previously listed parties and attorneys by first and last name only. Now first, middle, last and generation are included.

5:12-bk-00012-RNO Notice will be electronically mailed to:

Susan Frisch on behalf of Debtor Joe Snow
Susan_Frisch@pamb.uscourts.gov

Susan Frisch on behalf of Plaintiff Joe Snow
Susan_Frisch@pamb.uscourts.gov

Jennifer Misceovich on behalf of Plaintiff Mellon Bank
Jennifer_Miscevich@pamb.uscourts.gov

Jennifer Misceovich on behalf of Plaintiff Aaron R Martin
Jennifer_Miscevich@pamb.uscourts.gov

Carol Stefano on behalf of Creditor Bank of America
carol_stefano@pamb.uscourts.gov, susan_frisch@pamb.uscourts.gov

United States Trustee
Carol_Stefano@pamb.uscourts.gov

5:12-bk-00012-RNO Notice will not be electronically mailed to:

Clitibank

Christina Kovach on behalf of Creditor Chase Bank
PO Box LMNO
Harrisburg, PA 17101

Claims Register - ALL USERS

View Multiple Documents

- The "View multiple documents" option, previously only available for the Docket Report, is now also available in the Claims Register.

Claims Register

Case number: 1:12-bk-8

Creditor type: Creditor (selected), Administrative

Creditor name: [Empty]

Claim number: [] to [] View multiple documents

Filed: 1/1/1980 to 2/27/2013

Entered: [] to []

Sort by: Claim Number (selected), Filed Date

View claims summary report

Run Report Clear

- When the option is selected, the report output will include a check box beside each claim document to which the user has access. If a claim document includes attachments, the Document Selection Menu displays a list of the documents associated with the entry.

Middle District of Pennsylvania - TRAIN Claims Register

1:12-bk-00008-MDF James Smoluck and Janet Smoluck

Judge: Mary D France Chapter: 13
Office: Harrisburg Last Date to file claims:
Trustee: Charles J DeHart, III (Trustee) Last Date to file (Govt):

Select All Clear All

Creditor: (82785) Claim No: 1 Status: Filed by: CR
Macys Original Filed Date: 02/03/2012 Entered by: Cindy Boyle
1 Main Street Original Entered Date: 02/03/2012 Modified:
New York, NY 21201

Secured claimed: \$500.00

History:

1:1	<input type="checkbox"/>	02/03/2012 Claim #1 filed by Macys, Amount claimed: (Boyle, Cindy)
6	<input type="checkbox"/>	02/03/2012 Withdrawal of Claim(s): 1 of MST filed on 2/3/2012. Filed by James Smoluck (Boyle, Cindy)

Description:
Remarks:

- As with the Docket Report, options to "View All" or "Download All" are now displayed on this screen when "View multiple documents" is selected.

	Claimed	Allowed
Secured	\$500.00	
Priority		
Administrative		

Total file size of selected documents (MB): 0.297662

Maximum file size allowed (MB): 30

View Selected
or
Download Selected

PACER Service Center
Transaction Receipt
02/27/2013 14:38:35

Claims Summary Report

- A new "Claims Summary Report" option has been added to the Claims Register selection criteria. This new format gives the viewer a snapshot overview of the claims in the case.

Claims Register

Case number: 09-896

Creditor type: Creditor
Administrative Creditor number:

Creditor name:

Claim number: to View multiple documents

Filed Entered

Sort by: Claim Number
Filed Date

View claims summary report

- When the "View claims summary report" box is selected, a condensed list of claims is produced. The summary screen lists the claims that match the search criteria in a table with the amount claimed for each. Hovering over a claim displays a breakdown of the claim amounts.

Claims Summary

[1:11-bk-00082-MDF Janis Jones](#)

Type: bk Chapter: 13 Office: 1 (Harrisburg)
 Assets: y Judge: MDF
 Date Filed: 02/04/2011 Last Date to File Claims: 06/22/2011 Last Date to File (Govt):
 Trustee: Charles J DeHart, III (Trustee)

Claim #	Amount claimed *	Date filed	Creditor number	Creditor name
1 View	\$1000000.00	12/02/2011	82708	Chris Noel 2
2 View	\$500000.00	01/18/2012	82753	Target
3 View	\$115.00	01/18/2012	82753	Target
4 View	\$5000.00	01/27/2012	80601	ALLEGHENY POWER
5 View	\$1500.00	01/27/2012	80604	CHAMBERSBURG HOSP!

Amount claimed: \$500000.00
 Secured claimed: \$100000.00
 Priority claimed: \$400000.00

Total Number of Claims: 5

Total Amount Claimed *	\$1506615.00
Total Amount Allowed *	

* Includes general unsecured claims

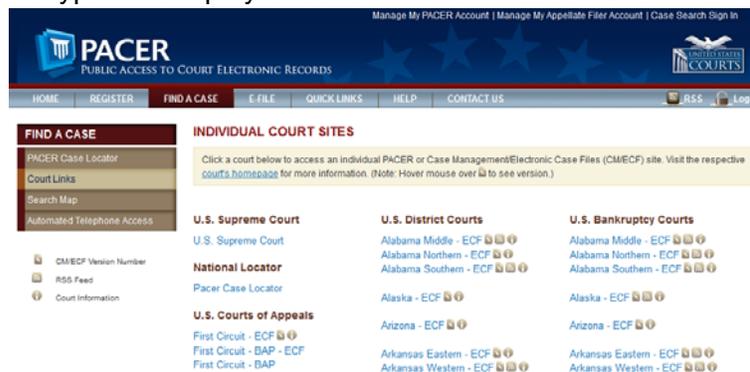
- Claims may be viewed individually by clicking the "View" hyperlink for the claim.
- Creditor/Claimant History is available by clicking on the creditor name hyperlink.
- The table can be sorted by claim number, date filed or creditor name. To sort, click on the column header.

Utilities Menu – PACER Links in CM/ECF – ALL USERS

- Two new menu selections appear under the *Utilities* menu to allow users to navigate quickly between CM/ECF and PACER.



- The **Link to Other Courts** hyperlink displays the Individual Court PACER links without leaving CM/ECF.



- The **PACER Case Locator** link displays the Case Search Sign In page.



- The following updates have been made to the PACER Case Locator provided by the PACER Service Center:
 - For bankruptcy cases and adversary proceedings, the attorney information is now extracted.
 - Alias records are now returned by a search based on SSN/ITIN or TaxID/EIN.
 - Debtor disposition and Joint Debtor disposition values are now extracted on all cases for which a disposition exists.