



SPECIAL EDITION- MOVING TO ECF VERSION 3

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Effective April 29, 2006, the court will be moving to the newest version of the ECF software (Version 3). Highlighted below are areas in which the program was modified. If you have any difficulty using the system, please contact our HelpDesk. The HelpDesk hours are Monday to Friday from 9:00 a.m. to 4:00 p.m. The number for Brooklyn is 347-394-1700, and press six. The number for Central Islip is (631)712-6200, and press six. Thank you for your patience regarding these changes.

If you currently have a training database password, you may immediately observe the changes in our training database located at: <https://ecf-train.nyeb.uscourts.gov/>

Opening a Case

- Version 3 has enhanced and streamlined the case opening process.
- The search screen for adding a party now includes first and middle name fields making the process more precise. Either the Last Name field or SSN (or Tax ID) field is still required, and a minimum of two characters are still required in the last name field.
- The Party Role field has been eliminated from the case opening party information screens. Now when adding a new debtor, joint debtor, plaintiff, defendant or petitioning creditor, you no longer are required to select the “role type.”
- On the Debtor, Plaintiff and Defendant Information screens, a new option to enter “Corporate Parent” has been added. Please do not select this option. It is not a requirement in our district.
- On the Party Information screen, a Review Button has been added. This will allow you to review aliases information entered.

- For **Bankruptcy cases**, the “Type of debtor” screen checkbox selections for Individual, Corporation, Partnership and Other have been changed to radio buttons. A new “Type of debtor” checkbox for Nonprofit Organization has been added. Selections listed with checkboxes can be picked if appropriate, but these selections are optional.
- For **Adversary Proceedings**, you may now select one primary nature of suit and multiple secondary natures of suit. The primary Nature of Suit should be the main issue of the complaint. A message has been added to this screen to assist you with the correct selection:

***If you only have one Nature of Suit select from Primary.
For additional Nature of Suit select from Secondary.***

You will see a description of the nature of suit on the main bankruptcy case docket report along with the numeric code.

Entering Parties in an adversary proceeding has been modified to be more specific regarding the caption. The first entry screen is entitled “Search for a Plaintiff.” After entering your first plaintiff, you will have the option of adding another plaintiff or select “End Plaintiff Selection.” Entering a defendant follows the same process.

- To open an **Involuntary case**, you previously used the “Open Bankruptcy Case” option and selected “Involuntary” several screens later. Now, there is an **Open Involuntary Case** menu option under the Bankruptcy category. At least one petitioning creditor must be added to the case. When a petitioning creditor is added to the case, the correct association with the filing attorney is ensured by a new feature. A filer must check the box at the bottom of the party screen, “**The user opening this case is the filing attorney for this party.**”
- When filing in Installments, the full fee of \$299 displays. You will see the following message:

The minimum installment payment as per General Order is \$40.00.

If you would like to pay the minimum payment, change the value below.

Upon completion of this event, you must also docket an Application to Pay Filing Fee in Installments.

Please be advised that you may pay more than \$40 if you wish.

Docketing

- When a party is being added, you can search by first and middle name as well as last name. Remember to identify the role of the party being added to the case (i.e., creditor).
- Previously, the docket text generated for a multi-part motion listed the parts in alphabetical order; now, the parts are in the order in which you select them.
- When performing any docketing task the screen will display at the top the **Case Type, Chapter, Office, Assets (y/n), Judge** and all **Case Flags**.

- When the system was slow and you clicked “Submit” more than once, a duplicate docket entry was sometimes being recorded. This has been corrected.

Query

- The Query menu now includes options for the Claims Register and the Creditor Mailing Matrix. If you wish to view the Creditor Register, please accept the default options.

Claims Register

- The heading is now organized differently and contains more information. Items added were Office, Chapter, Trustee, Claim and Government Bar Dates.
- The Claims Register now displays the most recent status for “Status”; statuses from earlier docket entries are shown under “History.” If History appears next to the creditor name, it indicates the creditor record has been edited and the current and previous name and address will appear by clicking on this History hyperlink.
- The report also displays the date of entry, the date of last modification for each claim, the type of person (whether creditor, debtor, attorney or trustee) who filed the claim and the initials of the court employee who entered the claim.
- There is now a link to the Claims Register on the Notice of Electronic Claim Filing.

Reports

- The Docket Activity Report is a new report. It will allow you to track activity on a particular case or cases in which you are a party.
- The Written Opinions Report is a new report. You can search for opinions by case, party name, etc. and view them via links in the report.
- The Docket Report displays the docket with party type labels above rather than below the party’s name and address.
- The Claims Activity Report searches using the “Creditor name” field are no longer case sensitive. A match is now made on the creditor name if the string entered is found anywhere in the name, not just at the beginning.
- On the Creditor Mailing Matrix Report, a transaction receipt is now displayed after the matrix when you select the “3-column” option, but the charges on the receipt may be different because before you see the matrix, data is sent to the National Creditor Registration Service (NCRS) so that addresses they have on file can be substituted for those recorded in CM/ECF; charges are based on the amount of data sent, rather

than the number of pages returned.

Utilities

- Clear Default PACER Login is a new option. This option removes the association between your CM/ECF login and your default PACER account so that you can set a new default. Removing the default might also be useful if you have multiple PACER accounts, so that you will be prompted each time you log in.

Miscellaneous

- This new Release 3 is designed to work with Netscape 7.2 and Internet Explorer 6, and may not function correctly with earlier versions of these browsers. Note: the default settings for Netscape 7.2 suppress popup windows. You must change this to allow pop-ups if the Legal Research options are to work [Edit/Preferences, Privacy & Security, Popup Window Controls].
- To meet a USPS requirement that the full name of the country be provided on international mail, 40 characters can now be entered for country. Also, the application components which print addresses for mailing (e.g., noticing) have been changed so that any country other than the US will be displayed as the last line of the address, in uppercase letters.
- The label for a party's last name has been changed to "Last/Business name" on query and data entry screens.
- Previously, PACER billing charges were limited to 30 pages for PDF documents. There is now no limit on charges made for transcripts, and opinions may be viewed without charge. In addition, the 30-page cap now applies to charges for queries and for the Cases, Claims Activity and Docket Activity reports. The Notice of Electronic Filing, the Billing Transaction Receipt, and messages issued before documents are displayed have been changed so that the language regarding charges is appropriate for the type of document.
- Court editing of the docket and the claims register will produce an "Editing" Notice of Electronic Filing. The notice is sent only to active attorneys/trustees and any additional addresses specified for their ECF accounts. Any documents linked to the edited docket entry can be viewed in the "free look" e-mail without charge for 15 days after the edit is made.