CHAPTER 8 BATCH FILINGS PAPERLESS ENTRY PAPER ENTRY

Batch Filings

The CM/ECF Batch Filings category was developed to expedite the filing of the same type of event in multiple cases by processing one docket entry. The Batch Filings feature offers the Trustee the opportunity to docket a paperless entry on the ECF system or to associate a PDF image for each case listed. This module will guide you through batch filing using the "paperless entry" method and associating a PDF image method using the "paper entry" method.

Paperless Entry

The **Trustee's Report of No Distribution** is a classic example of an entry that can be processed in batch. The same docket text is needed in every case. This module demonstrates the steps to take to docket a Trustee's Report of No Distribution using <u>Batch Filings</u>. Those trustees filing electronically will process a paperless docket entry, eliminating the need to attach a PDF image to the entry.

Note: When it is necessary to docket to a single case, you may follow the steps for batch docketing, but instead key in only one case number.

All events that can be filed by the Trustee using Batch Filings begin with TRUSTEE.

- STEP 1 Click the <u>Bankruptcy</u> hypertext link on the CM/ECF Main Menu.
- STEP 2 The Bankruptcy Events screen displays.
 - Click the <u>Batch Filings</u> hypertext link.
- STEP 3 The Case Number List Box screen displays. (See Figure 1)



Figure 1

Type the complete case number in the Extended Window box.
 (Case number format - office code-yy-bk-nnnnn)

Note: If this entry will be filed in many cases, it is suggested that the list of case numbers be copied to the clipboard after they are typed. This is because if any of the case numbers entered in CM-ECF are erroneous, an error message appears and the valid case numbers already entered will be <u>lost</u> but for the final case number typed. If that happens, one can easily paste the list into the Extended Window Box again, make the corrections, and continue on quickly without having to re-type the entire list. To copy the case numbers to the clipboard:

- Type the list of case numbers.
- Highlight the list with your mouse
- Press the keystroke [Ctrl + C] to copy the list.
- Use the keystroke [Ctrl + V] to paste the list of case numbers in the box.
- Click [Next] to continue.

STEP 4 The Document Selection screen displays. (See Figure 2)



Figure 2

- Verify each case number and case name.
- If any of the case numbers and names are incorrect, click the browser [Back] button. Paste the case number list into the Extended Window Box, and then find and correct the erroneous case numbers.

Note: If the system prompts that you have entered an invalid case number, click the browser **[Back]** button to try again. You may use the browser **[Back]** button at any time during this process to verify former screens until the final submission.

Use the down arrow — to the right of the box to scroll through the event list to select the type of document to be filed (in this example, Report of No Distribution)

Click [Next] to continue.

STEP 5 The Verification screen displays. (See Figure 3)

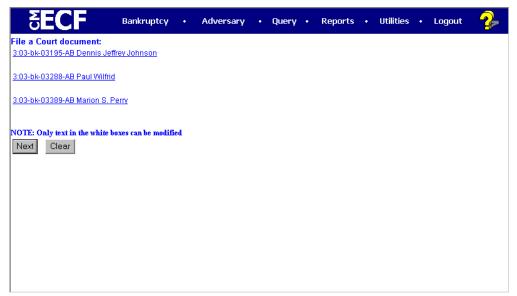


Figure 3

- Verify the case numbers and case names
- Click [Next] to continue.

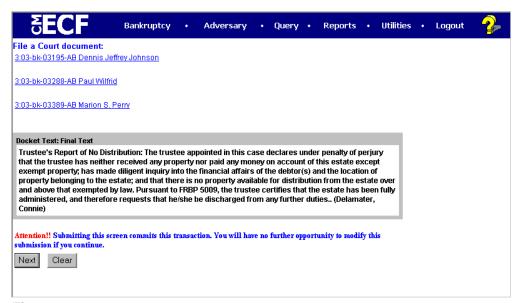


Figure 4

STEP 6 The Final Approval screen displays. (See Figure 4)

- Verify the Final Docket Text. Read the Attention!! message.
- If the Final Docket Text is correct:
- Click [Next] to continue and officially submit the document.
- If The Final Docket Text is incorrect:
- Click the browser [Back] button to find the error(s) and then proceed with the event.
- To abort or restart the transaction, return to Step 1 and begin again.

STEP 7 The Notice of Electronic Filing displays.

- One Notice is received for all cases.
- Clicking on the case number hypertext link on the Notice of Electronic
 Filing will present a docket report for the selected case.
- Clicking on the document number hypertext link will present the PDF image of the document chosen.
- Scroll down to see participants who have and have not registered for electronic noticing on this 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 bar and select Save Frame As.
- You may also save the notice through the browser File/Save option.

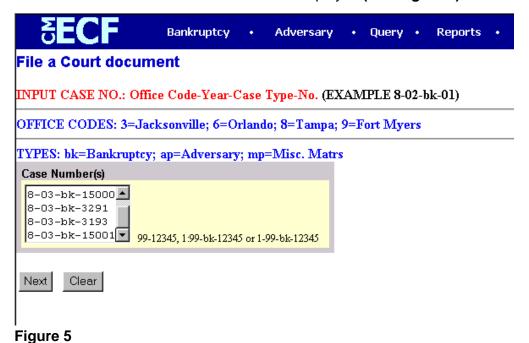
Paper Entry

The Batch Filings feature offers the option to associate a different PDF image for each case listed.

The Trustee's **Interim Report** is an example of an entry that can be filed using <u>Batch Filings</u>. The same docket text is needed in every case, however each case will also need its own unique PDF image. This section of the module demonstrates the steps to take to docket an Interim Report in multiple cases using <u>Batch Filings</u>. The same steps would be followed for other types of allowable Batch Filings events that a PDF image is needed.

All events that can be filed by the Trustee using Batch Filings begin with TRUSTEE.

- STEP 1 Click the Bankruptcy hypertext link on the CM/ECF Main Menu.
- STEP 2 The Bankruptcy Events screen displays.
 - Click the <u>Batch Filings</u> hypertext link.
- STEP 3 The Case Number List Box screen displays. (See Figure 5)



Type the complete case number in the Extended Window box.
 (Case number format - office code-yy-bk-nnnnn)

Note: If this entry will be filed in many cases, it is suggested that the list of case numbers be copied to the clipboard after they are typed. This is because if any of the case numbers entered in CM-ECF are erroneous, an error message appears and the valid case numbers already entered will be <u>lost</u> but for the final case number typed. If that happens, one can easily paste the list into the Extended Window Box again, make the corrections, and continue on quickly without having to re-type the entire list. To copy the case numbers to the clipboard:

- Type the list of case numbers.
- Highlight the list with your mouse
- Press the keystroke [Ctrl + C] to copy the list.
- Use the keystroke [Ctrl + V] to paste the list of case numbers in the box.
- Click [Next] to continue.

STEP 4 The Document Selection screen displays. (See Figure 6)

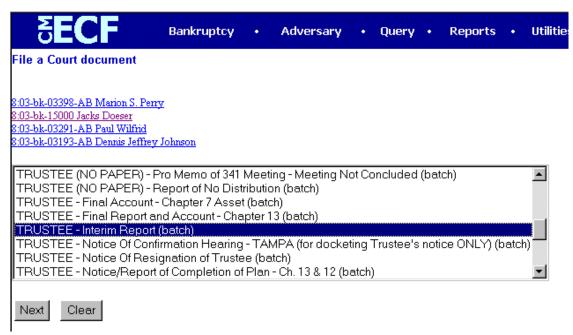


Figure 6

- Verify each case number and case name.
- If any of the case numbers and names are incorrect, click the browser [Back] button. Paste the case number list into the Extended Window Box, and then find and correct the erroneous case numbers.

Note: If the system prompts that you have entered an invalid case number, click the browser **[Back]** button to try again. You may use the browser **[Back]** button at any time during this process to verify former screens until the final submission.

- Use the down arrow to the right of the box to scroll through the event list to select the type of document to be filed (in this example, Trustee - Interim Reports).
- Click [Next] to continue.

STEP 5 The PDF Document Selection screen displays. (See Figure 7)



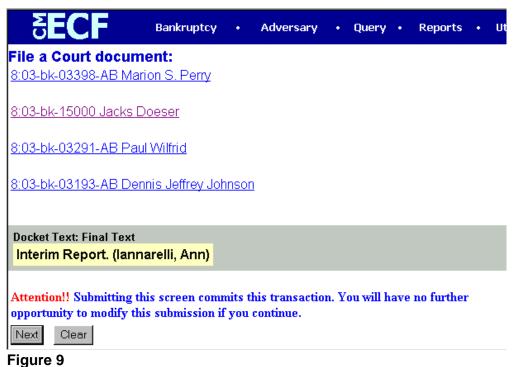
Figure 7

- Click [Browse], to the right of the first case number then navigate to the directory where the appropriate PDF file is located. To verify you have selected the correct document right click on the highlighted filename and selecting Open to view the image in Adobe Acrobat. Once verified, double-click the PDF file or click Open to select it and associate it with the docket entry. Repeat this step for every case in the batch file.
- Click [Next] to continue.



STEP 6 The **Verification Screen** will display. (See Figure 8)

Click [Next] to continue.



STEP 7 The Final Docket Text screen appears (See Figure 9)

- Verify the accuracy of the Final Docket Text.
- Verify the Final Docket Text. Read the Attention!! message.
- If the Final Docket Text is correct:
 - Click [Next] to continue and officially submit the document.
- If The Final Docket Text is incorrect:
 - Click the browser [Back] button to find the error(s) and then proceed with the event.
 - To abort or restart the transaction, return to Step 1 and begin again.

STEP 9 The Notice of Electronic Filing displays.

- One Notice is received for all cases.
- Clicking on the case number hypertext link on the Notice of Electronic Filing will present a docket report for the selected case.
- Clicking on the document number hypertext link will present the PDF image of the document chosen.
- Scroll down to see participants who have and have not registered for electronic noticing on this 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 bar and select Save Frame As.
- You may also save the notice through the browser File/Save option.