

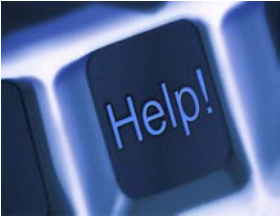


# Electronic Case Filing Attorney Training Handout

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*Effective May 28, 2013*

## CONTACT INFORMATION



**ECF HELP DESK** – The ECF Help Desk is available for assistance with ECF technical problems, procedures and case information.

**(800) 442-6850**

**Direct: (214) 753-2600**

**[ecfhelp@txnb.uscourts.gov](mailto:ecfhelp@txnb.uscourts.gov)**

**EDIT DEPARTMENT**- In the event a filing error occurs after submission, please send an email to the Edit Department for correction within 48 hours. Include the case number and document number in the subject line to be directed to the appropriate clerk.

**[edit.request@txnb.uscourts.gov](mailto:edit.request@txnb.uscourts.gov)**

**ECF ON-LINE RESOURCES** – The on-line resources listed below are available to Electronic Case filers such as the ECF Manual and a Knowledge Base of frequently asked questions.

**ECF User Manual:** **[www.txnb.uscourts.gov/ecf/manual/contents.htm](http://www.txnb.uscourts.gov/ecf/manual/contents.htm)**

**ECF FAQ's:** **[www.txnb.uscourts.gov/court-info/faq/](http://www.txnb.uscourts.gov/court-info/faq/)**

**ECF TRAINING** - The addresses listed provide information related to training for electronic case filing and instructions for registering to become ECF registered in our district.

**ECF Training**

**[ecftraining@txnb.uscourts.gov](mailto:ecftraining@txnb.uscourts.gov)**

**ECF Registration Requirements**

**<http://www.txnb.uscourts.gov/becoming-registered-ecf-user>**

### **CREDIT COUNSELING AND DEBT EDUCATION CERTIFICATES**

A list of agencies that provide the required certificates can be obtained through the website listed below.

**[www.usdoj.gov/ust/eo/bapcpa/ccde/index.htm](http://www.usdoj.gov/ust/eo/bapcpa/ccde/index.htm)**



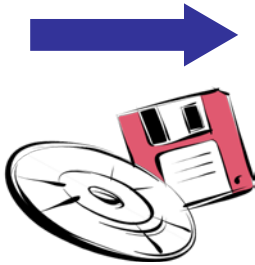
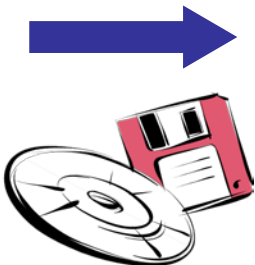

## ECF File Formats

### Proper Formatting of documents

Files uploaded in ECF are required to be in a specific format according to document type. Documents such as petitions, Verification of Mailing List w/ List of Creditors, Plans, Motions, Responses, Exhibits and Proposed Orders should be uploaded in Portable Document Format (.pdf).

The only documents that should **not** be uploaded in .PDF format are the creditor matrices. Matrices should be submitted in ASCII DOS text format.

The court's ECF User Manual contains instructions for creating documents in the required ECF formats. You can view the on-line [ECF manual](#) from our website at [www.txnb.uscourts.gov](http://www.txnb.uscourts.gov).

Petitions, Verification of Mailing List w/ List of Creditors, Plans, Motions, Responses, Exhibits, etc.		Portable Document Format (.pdf)
Creditor Matrices		ASCII DOS text (.txt or .scn)
Orders		Portable Document Format (.pdf)

## Log in to ECF

### Overview

The ECF system is a web based software program. At a minimum, Internet Explorer 5.5v or Mozilla Firefox is recommended for use with this program. ECF court users process cases through the federal courts' restricted intranet while attorneys and other public users will submit pleadings and view case data from the Internet. Both court and external users have different levels of access to screens via menu selections and functionality as determined by their needs.

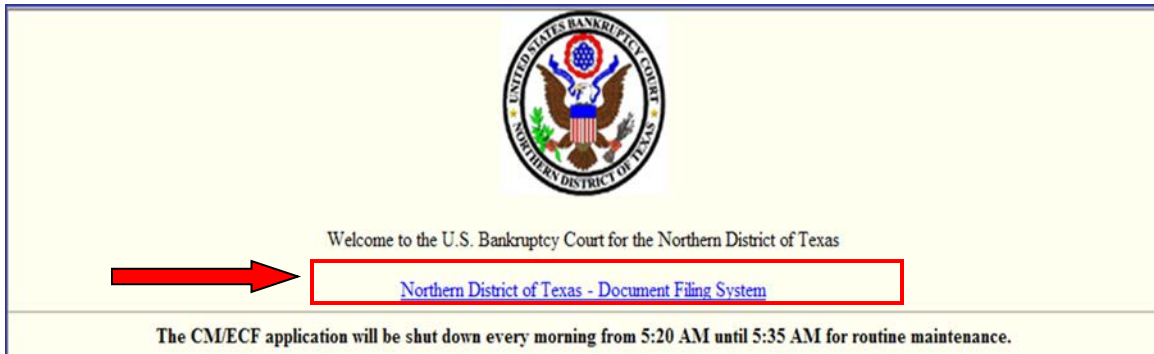
Log in procedure:

**NOTE: Please be aware that these instructions are not complete instructions for using Internet Explorer or Mozilla Firefox. Consult the documentation associated with the browser software for additional information.**

1. Access Internet Explorer or Mozilla Firefox.
2. Access the Court's website at: [www.txnb.uscourts.gov](http://www.txnb.uscourts.gov)
3. Click on "ECF Filing (CM/ECF)" hyperlink located on the left side of the screen as shown below.



- Click on the “Northern District of Texas – Document Filing System” hyperlink.



- Enter your **Login** and **Password** (password fields are case sensitive).

## CM/ECF Filer or PACER Login

### Notice

This is a **Restricted Web Site** for Official Court Business only. Unauthorized entry is prohibited and subject to prosecution under Title 18 of the U.S. Code. All activities and access attempts are logged.

### Instructions for viewing filed documents and case information:

If you do not need filing capabilities, enter your PACER login and password. If you do not have a PACER login, you may register online at <http://www.pacer.gov>.

### Instructions for filing:

Enter your CM/ECF filer login and password if you are electronically filing something with the court.

<b>Authentication</b>	<b>IMPORTANT NOTICE OF REDACTION RESPONSIBILITY:</b> All filers must redact: Social Security or taxpayer-identification numbers; dates of birth; names of minor children; and financial account numbers, in compliance with <a href="#">Fed. R. Bankr. P. 9037</a> . This requirement applies to all documents, including attachments.
Login: <input type="text"/>	
Password: <input type="password"/>	
Client code: <input type="text"/>	
<input type="checkbox"/> I understand that, if I file, I must comply with the redaction rules. I have read this notice.	
<input type="button" value="Login"/> <input type="button" value="Clear"/>	

**Note:** Your “Live” login and password serves as your signature for documents filed electronically.

6. Select a **Menu** option from the banner across the top of the screen. Available options include: Bankruptcy, Adversary, Query, Reports and Utilities



7. To exit the ECF system click “**Logout.**”

## Maintain User Accounts


### Overview

An ECF account is created for ECF Users and a login and password are issued. The login and password combination constitutes as the ECF filer's signature. The ECF login provides registered users the ability to submit pleadings and orders electronically to the court.

**NOTE: ECF Users can access their own account information through "Maintain Your ECF Account" found under the "Utilities" menu. Using this option, ECF users can update their name, mailing and email addresses, phone, fax numbers and password. Users can therefore control the accuracy of their own information in a timely manner.**

### A. UPDATING USER NAME, ADDRESS AND OTHER DATA

1. Select **Utilities** from the menu
2. Click **Maintain Your ECF Account** as illustrated below.

Your Account	Miscellaneous	Transcripts
<a href="#">CM/ECF Login</a>	<a href="#">Mailings...</a>	
<a href="#">Change Your Password</a>	<a href="#">Verify a Document</a>	<b>General Information</b>
<a href="#">Change Your Client Code</a>	<a href="#">Check PDF Document</a>	<a href="#">Court Information</a>
 <a href="#">Maintain Your ECF Account</a>		<a href="#">Legal Research</a>
<a href="#">Internet Payment History</a>		
<a href="#">Internet Payments Due</a>		
<a href="#">Review Billing History</a>		
<a href="#">View PACER Account Info</a>		
<a href="#">Change Your PACER Account</a>		
<a href="#">Clear Default PACER Login</a>		
<a href="#">View Your Transaction Log</a>		

- Your user account screen will appear displaying your current account information.

**MCECF**    Bankruptcy ▾    Adversary ▾    Query    Reports ▾    Utilities ▾

★    ↶    📄 Docket Sheet    📌 Claims Register    📄 List of Creditors    📅 Deadlines/Hearings    📅 Calendar

**Maintain User Account**

Lock this account

**Last name** Attorney    **First name** Test

**Middle name**    **Generation**    **Title**    **Type** Attorney ▾

**Office**    **Address 1** 1100 Commerce St. Rm. 1254

**Address 2**    **Address 3**

**City** Dallas    **State** TX    **Zip** 75242

**Country**    **County** ▾

**Phone**    **Fax**

**SSN/ITIN**    999-99-9999    **Tax Id/EIN** 12-1234567

**Bar ID**    **Bar status** ▾    **Mail group**

**Initials**    **DOB**    **AO code**

Email information...    More user information...

Submit    Clear



**B. UPDATING EMAIL INFORMATION**

The Email Information screen displays your current account information. You have the ability to update the following information:



- Change your primary email address and add secondary addresses
- Receive email notifications for documents and claims filed in any case to which you are a party, either as individual emails or as a daily summary report.
- Designate case(s) you are not associated with to send email notifications for monitoring the case(s).
- Send notices for only the bankruptcy case **or** the bankruptcy and all related adversaries.

Emails will come in the form of an “Electronic Notice of Filing” and will include the following information:

- A. case number
- B. hyperlink to view the document
- C. docket entry text

U.S. Bankruptcy Court  
Northern District of Texas (train)

Notice of Electronic Filing

The following transaction was received from Chris Tello entered on 6/16/2009 at 12:39 PM CDT and filed on 6/16/2009

Case Name: Snoopy L. Smith and Caroline Smith

Case Number: 09-30050-bh13

Document Number: 10

Docket Text:  
Motion to abandon fidsfsd. Fee amount \$150, Filed by Creditor Brad Pitt Objections due by 7/1/2009. (Tello, Chris)

You will receive one free look at the document and any additional viewings will incur standard PACER fees. Follow the steps below for instructions on how to update your email information.

1. Click on **Utilities**
2. Select **Maintain Your ECF Account**
3. Click the “**Email Information**” button at the bottom of the screen
  - a. **Primary Email address:** This address must be formatted to Internet Protocol or an error will be generated. It may be prudent to establish a separate email account for ECF activity from your routine email correspondence. The court recommends adding a secondary email address with an ISP provider different from the

primary email address for the purpose of re-directing emails in the event the primary ISP server is down.

- b. **Send the Notices Specified Below:** Select either one or both options: Primary Email Address and/or secondary addresses
  
- c. **Send notices in cases in which I am involved.** You have the option to specify which cases you would like to receive email notifications for by entering the case number in the following format: XX-XXXXX. These are cases that you are not currently associated with. However, this function **will not allow you to obtain the free look** available to filers who are identified as electronic filers in the cases.
  
- d. **Adversary Proceeding Notices:** Filers have the option to receive notices for adversary cases and their related bankruptcy cases they are associated with. Alternatively, they can choose to only receive notifications for the adversaries they are involved with and not their related bankruptcy cases.
  
- e. **Send a Notice for Each Filing:** By checking this box, you will receive email notices when activity occurs throughout the day to the account(s) specified above. The title of the email will describe the type of filing and the case number.
  
- f. **Send 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. A Summary Report includes the case numbers and titles of cases in which activity occurred for that day. The text of the Summary email notification will display the docket event and the document number (including the hyperlink to the document).

**NOTE: YOU CANNOT ELECT TO RECEIVE BOTH SEPARATE NOTICES AND THE DAILY SUMMARY REPORT.**

- g. **Format Notices**
  - HTML format for most modern email programs or ISP email service. This format will include hyperlinks to the document or claim.
  - Text format for cc: Mail, GroupWise, other email service. Text format will feature the URL of the PDF document, which can be copied and pasted into the location bar of your browser.

- h. Click **Return to Account Screen** once you are finished inputting the information.
- i. Click **Submit** to save your changes.

**C. UPDATING CASE INFORMATION**



1. After you click **Submit** on the **Account screen**, the **Select the cases to be updated** screen will appear.

**NOTE: MODIFICATIONS TO NAME, SSN, AND TAX ID WILL AUTOMATICALLY UPDATE ALL CASES.**

2. Select the desired cases and then click **Submit**. We recommend that you check the boxes for **Open and Closed cases**, then select **Update All cases** from the list of all associated cases. After the submission is made, a confirmation screen appears showing the updates that have been completed successfully.

**D. MORE USER INFORMATION**

1. Click on **More User Information** from the **Maintain User Account** screen.
2. This screen will allow you to change your password. The password must comply with the following criteria:
  - must not be less than 8 characters
  - must include both upper and lower case letters and
  - a special character or a number
3. Also when you enter a new password it is displayed on the screen, but your subsequent queries will only show asterisks. Follow the steps below to make the changes.
  - Select the **Password** field
  - Delete the current password
  - Enter new password



**CONTACT THE COURT'S HELP DESK IF YOU MISPLACE YOUR PASSWORD OR SEND AN EMAIL TO [ecfhelp@txnb.uscourts.gov](mailto:ecfhelp@txnb.uscourts.gov).**

4. Click **Return to Account** screen when finished. Click **Submit** to save changes.

## CONVERTING DOCUMENTS TO PORTABLE DOCUMENT FORMAT (.pdf)

### Overview

The following are instructions to convert WordPerfect or Microsoft Word documents to Portable Document Format (.pdf).

#### WORDPERFECT

1. Open the document to be converted
2. From the **File** menu select **Print**
3. In the Print Dialog box, click the **Main** tab
4. Under the **Destination** category click the drop down arrow in the **Name** field
5. Select **Adobe PDF**
6. Click the **Print** button

**NOTE:** Within a few moments the **Save PDF File As** dialog box will appear.

7. Select the location to save the file using the **Save In** drop down arrow
8. Name the file
9. Click **Save**

The file will be converted to PDF and the file name should contain the .pdf extension.

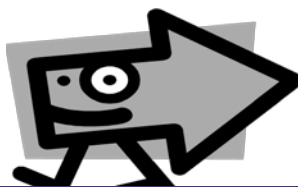
#### MICROSOFT WORD

1. Open the document to be converted
2. From the **File** menu select **Print**
3. In the Print Dialog box select the drop down arrow for printer **Name**
4. Select **Adobe PDF**
5. Click **OK**

**NOTE:** Within a few moments the **Save PDF File As** dialog box will appear.

6. Select the location to save the file using the **Save In** drop down arrow
7. Name your document under **File Name** field
8. Click **Save**

The file will be converted to PDF and the file name should contain the .pdf extension.



PDF

## CONVERTING CREDITOR MATRIX TO .TXT FORMAT

### Overview

The following instructions guide you to correctly format a matrix and save it as a .txt file when using WordPerfect or Microsoft Word.

A matrix contains the name of the creditor and their mailing addresses. This information is used for noticing, and claims information, when applicable. The matrix **MUST** be filed as a creditor list in .pdf as well as a txt. file. The following are instructions to convert your matrix to a text file.

### CREDITOR MATRIX SPECIFICATIONS

Please refer to the ECF Style Guide located in the ECF User Manual for the correct format and punctuation rules and abbreviations to use when preparing a matrix.

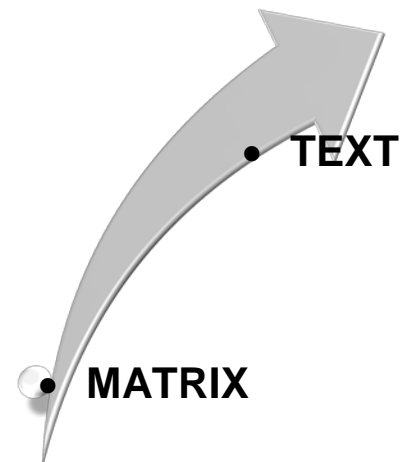
- Names and addresses should be left justified (flush against the left margin, no leading blanks)
- Do not include page numbers, headers, footers, etc.
- The name and address of each creditor must be five (5) lines or less
- Each line may contain no more than 40 characters including blanks
- The creditor name must be on the first line
- Do not include account
- If "ATTENTION" lines are included, they must go on the second line
- City, state abbreviation and ZIP code must be on the last line.
- Nine digit ZIP codes must contain a hyphen separating the two groups of digits
- All states must be two-letter abbreviations
- Each creditor must be separated by at least one blank line

### CONVERTING TO .TXT FROM MICROSOFT WORD

1. From the **File** menu, select **Save As**.

**NOTE:** The preferred practice is to use the debtor name in the file name. This will allow you to prepare and save the creditor matrix before you open the case and obtain a case number. Example names are shown below.

gary\_grant\_matrix.txt  
acme\_enterprises\_matrix.txt



2. Select **Plain text (\*.txt)** as the **Save As type**
3. Select the location to save the file using the **Save In** drop down arrow
4. Name your document in the **File Name** field.
5. Click **Save**

### **CONVERTING TO .TXT FROM WORDPERFECT**

1. From the **File** menu select **Save As**
2. Name the file

**NOTE:** The preferred practice is to use the debtor name in the file name. This will allow you to prepare and save the creditor matrix before you open the case and obtain a case number. Examples name formats are shown below:

gary\_grant\_matrix\_matrix.txt  
acme\_enterprises\_matrix.txt  
gary\_mary\_grant\_matrix.txt



3. Select **ASCII Dos Text** from **File Type** drop down list
4. Select the location to save the file using the **Save in** drop down arrow
5. Click **Save**

## CREATING LINKAGES IN ECF

The list below is a guide for correct pleading linkages in ECF. The general rule of linking is, "If what you are filing relates to something else on the docket sheet, then you must link it to that document." The trick is figuring out what requires linkage. The list below provides some examples of the more common pleadings that require linkage in ECF. A document should **never** be linked to a notice of hearing; but instead it **should** be linked to the document set for hearing. **If you ever have questions about linking pleadings in ECF, please contact our Help Desk at (214) 753-2600. Our staff will be glad to assist you.**

Pleading	Should be linked to.....
Affidavit	Related motion or application
Notice of Hearing	Related motion/application or complaint you are setting for hearing
Amended Notice of Hearing	Related motion/application or complaint you have set for hearing
Response or Objection	Related motion/application to which you are responding
Proposed Orders	Related motion/application
Proposed Judgment in Adversary	Complaint
Witness and Exhibit List	Related motion/application or complaint
Notice of Withdrawal	Related motion/application you wish to withdraw
Notice of dismissal of complaint	Complaint
Notice/Certificate of no objection	Related motion/application to which you have no objection
Amended Complaint	Original Complaint
Answer to Complaint	Original Complaint
Answer to an Amended Complaint	Amended Complaint
Amended Answer to a Complaint	Original Answer
Amended Chapter 13 Plan	Most recent filed Chapter 13 plan
Objection to Confirmation	Chapter 13 Final Plan
Modified Chapter 13 Plan	Chapter 13 Final Plan
Motion to Continue Hearing	Related motion/application or complaint
Brief	Related motion/application or complaint
Proposed Findings of Fact	Complaint or related motion/application



  
**Leave a 4-inch margin at the top of the document.**  
**The judge's electronic signature, date of signature**  
**and court seal will be applied here.**  


**IN THE UNITED STATES BANKRUPTCY COURT  
FOR THE NORTHERN DISTRICT OF TEXAS  
DALLAS DIVISION**

<b>IN RE:</b>	§	<b>CASE NO. 02-39456</b>
	§	
<b>JOHN DOE AND RITA DOE</b>	§	
	§	
<b>DEBTOR</b>	§	

**ORDER ON MOTION FOR RELIEF FROM STAY**

On March 5, 2003, came for hearing ABC, Inc. ("Creditor") pursuant to section 362(d) of the United States Code, on its Motion for Relief from Automatic Stay ("Motion"). The Court has considered the Motion and the lack of objection thereto, as well as statements of counsel for Creditor that counsel for John Doe and Rita Doe ("Debtors") and James Doe, the Trustee in this case, have communicated that they have no objection to the motion.

Ordered that the Motion is granted. The automatic stay in this case is terminated as to the Creditor and that certain improved real property located at 123 Street, Dallas, TX 75201, Lot 1, Block 1 and lease for the same is rejected.

**###END OF ORDER###**

/s/ Joe Attorney  
TBA #12345678  
Law Office of Joe Attorney  
111 Street, Suite A  
Dallas, TX 75242

Additional signatures should be placed below the "End of Order" text

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## SCANNING GUIDELINES

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### Overview

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It is critical that ECF users configure their scanning software correctly for all images uploaded to ECF. The major consequence of incorrectly configured scanning software is significantly increased file size. In some instances, files may be as much as 20 to 40 times larger. These massive files cause various problems:



- Vastly increased file storage requirements at the user's PC and server as well as a general slowness in handling such files.
- Vastly increased network traffic both locally and through the user's Internet Service Provider, resulting in extremely long file upload times. Files may be rejected due to size or the system may time out due to excessively large files.
- A very slow response time from ECF during file upload, delay in obtaining confirmation of successful receipt, or rejection of the file.
- A very slow file download and opening time when attempting to read large files already uploaded into ECF.

All of these problems can be avoided by ensuring scanning software is correctly configured.

### Correct Configurations

- Resolution should be set to 300 dpi.
- Image type should be set to black and white (**NOT** gray scale, **NOT** color)
- Scanned image output or "save as" format should be Tagged Image File format (TIF) for purposes of compression (ideally compressed CCITT4). Check your scanner software manual or Help for information on how to set output type.

Test your scanner setup and convert a file to PDF prior to uploading to ECF. The PDF conversion can be done with several software packages. The result should be a file no larger than approximately 50KB per page for a document that is mostly text and no larger than 300KB per page for a document that contains graphics. File size can be checked by viewing the "Properties" of the file (right click on the file and choose "Properties").

### **Approximate PDF file size of this page after scanning:**

- At 300 dpi 52KB
- **5MB PDF file size limit**