3.3   **REPORTS AND QUERY**

Running Reports

Click on the **Reports** hyperlink on the blue CM/ECF Main Menu Bar.

The **Reports** menu will display.

After clicking on the desired report hyperlink, the PACER logon screen will appear.

You will be asked to enter your PACER login and password to view report information if you are not already logged into PACER. Applicable fees will apply. Note that the following screens you see will be very similar in appearance to the CM/ECF screens.

Steps for running a few common report events are outlined below.

Cases Report

    Step 1: Click on Reports hyperlink on CM/ECF Main Menu
    Step 2: Click on Cases Report
    Step 3: Define limiting criteria for report by clicking on drop-down menus
    Step 4: Select sorting method for report by clicking on drop-down menus
    Step 5: Click on the Run Report button

Docket Report

    Step 1: Click on the Reports hyperlink on CM/ECF Main Menu
    Step 2: Click on Docket Report
    Step 3: Enter the case number for the docket report you wish to run
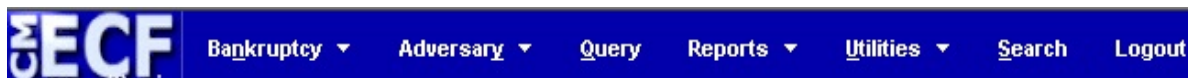   Step 4: Click on the Run Report button

Claims Registers

    Step 1: Click on the Reports hyperlink on CM/ECF Main Menu
    Step 2: Click on Claims Register
    Step 3: Enter the case number for the claims register you wish to run
    Step 4: Click on the Run Report button
    Step 6: The Search Results screen will display. Be sure that the radio button for
        "Claims Register" is selected - Click Next

Query

The CM/ECF Query functions allows you to search for and obtain information about a case ranging from names and addresses of parties to docket reports and calendar information. You must have a PACER account to access case information through Queries, and fees will apply as appropriate.

The Queries option in CM/ECF is composed of screens and prompts which are designed to be user-friendly. Queries has its own section in CM/ECF and all of the available queries functions can be accessed by first clicking on the Queries link in the blue CM/ECF Main Menu Bar. Then, enter the case number or name search clues to pull up information for the case being queried. If there are multiple case matches, you will need to select the correct case before the queries screen will display.

Click on the **Query** hyperlink on the blue CM/ECF Main Menu Bar.

The PACER login screen will appear.

If You are not already logged into PACER, you will be asked to enter your PACER login and password to view case information.

The QUERY screen will appear.

Enter search clues.

Click on [Run Query] button.

Note that the following PACER screens you see will be very similar in appearance to the CM/ECF screens.

Finding a Case Number/Case Information with Debtor's Last Name:

Step 1: Click on the Query option on the blue CM/ECF Main Menu
Step 2: Type in Debtor's/Party's Last Name
Step 3: Click on Run Query button
Step 4: Select the appropriate party from the list of parties provided

This will give you the Query Screen specific to the case you have selected

NOTE: Options available to you under the QUERY menu may vary depending on user privileges assigned by the Court.

Selecting the Query that best suits your needs:

Alias - Lists all aliases listed for the parties in the case

Associated Cases - All cases related to the selected case will be displayed. By clicking on the case number of any listed related case, the user will be able to view the docket sheet for the related case (adversaries, consolidated case, etc.)

Attorneys - Lists attorney name and address information for each party in the case and also displays the date the attorney appeared in the case and the party's full name and address.

Case Summary - Provides a one screen snap-shot summary of the basic information from the case record, including trustee information, statistical information, case status and the disposition of the case.

Creditors - Provides listing of creditors associated with the case.

Deadline/Schedule - Allows you to run a listing of all deadlines that have been set in the selected case. The table may list the following information: the name of the deadline, what document number is associated with the deadline, the date the deadline was entered into the computer, the date for which the deadline is/was set and the date satisfied or terminated if applicable.

Docket Report - User will be taken to the Docket Report selection screen and after selecting the appropriate criteria, the docket sheet will display. This is only one way to access the docket report; the report can also be produced by clicking on the case number hyperlink on any screen on which it is displayed.

Filers - Lists all parties in a case who have filed documents. By clicking on a name listed on the screen, the user can see a listing of all documents filed by that party.

History/Documents - Shows the events that were docketed with the "Filed" and "Entered" dates.

Notice of Bankruptcy Case Filing - Printable document for notification of bankruptcy case filing (proof of filing of the case). It includes the date and the time the case was filed, a list of recipients who received notice electronically and the Court seal.

Party - Provides a listing of all of the parties associated with a case.

Related Transactions - Provides a listing of all docket transactions and the previous/subsequent actions to which they relate. For example, a motion and objection to that motion will be grouped together even if they were filed a month apart because they are related to each other.

Status - Shows the current case status.

Trustee - Shows the trustee assigned to the case along with address and date assigned.

Claims Register - User will be taken to the Claims Register selection screen and after selecting the appropriate search criteria and clicking on "Run Report" the claims report will display. This is only one way to access the claims report; the report can also be produced by clicking on the claim number hyperlink on any screen on which it is displayed.

Creditor Mailing Matrix - After specifying the case number and preferred report format, click on "Run Report" to produce the creditor mailing matrix.