Cases Report

For Trustees and Attorneys

The Cases report presents information from the court's database with a variety of selection criteria for case management and tracking.

STEP 1 Click on the Reports hyperlink on the CM/ECF Main Menu **(See Figure 1.)**

Figure 1

STEP 2 The **REPORTS** screen displays with a list of reports that can be generated **(See Figure 2.)**

Figure 2

- Click on the Cases hyperlink.

STEP 3 The **PACER LOGIN** may display **(See Figure 3)**.

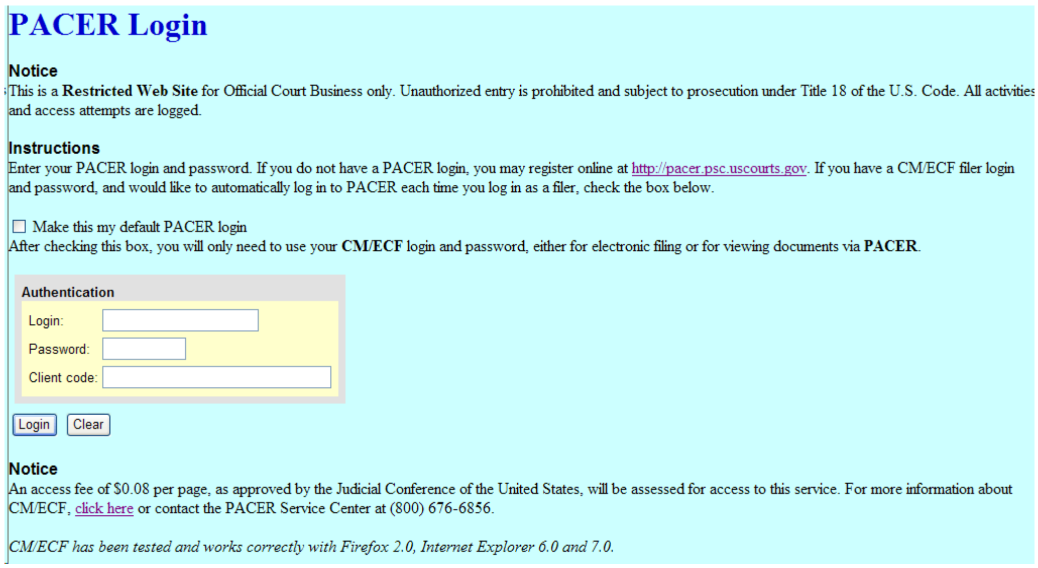

Figure 3

NOTE: The Public Access to Court Electronic Records (PACER) program provides access to CM/ECF users. Logins and passwords can be issued by registration with the PACER Service Center. Current PACER logins and passwords will be accepted by the CM/ECF system. Note the information that is provided to the user on the screen above.

- Enter your PACER assigned **Login** and **Password** (These fields are case sensitive).
- Enter the **Client Code**. This optional field is used for billing by PACER users. The data will be included in PACER billing reports.

NOTE: If you click in the **Make this my default PACER login** box, your login will automatically appear each time you attempt to access PACER. If you click on the **[Reset]** button, all entries will be cleared. To change the client code within a session, go to Change Client Code under the Utilities Menu.

- Click on the **[Login]** button.

STEP 4 The **CASES REPORT** selection screen displays. **(See Figure 4.)**

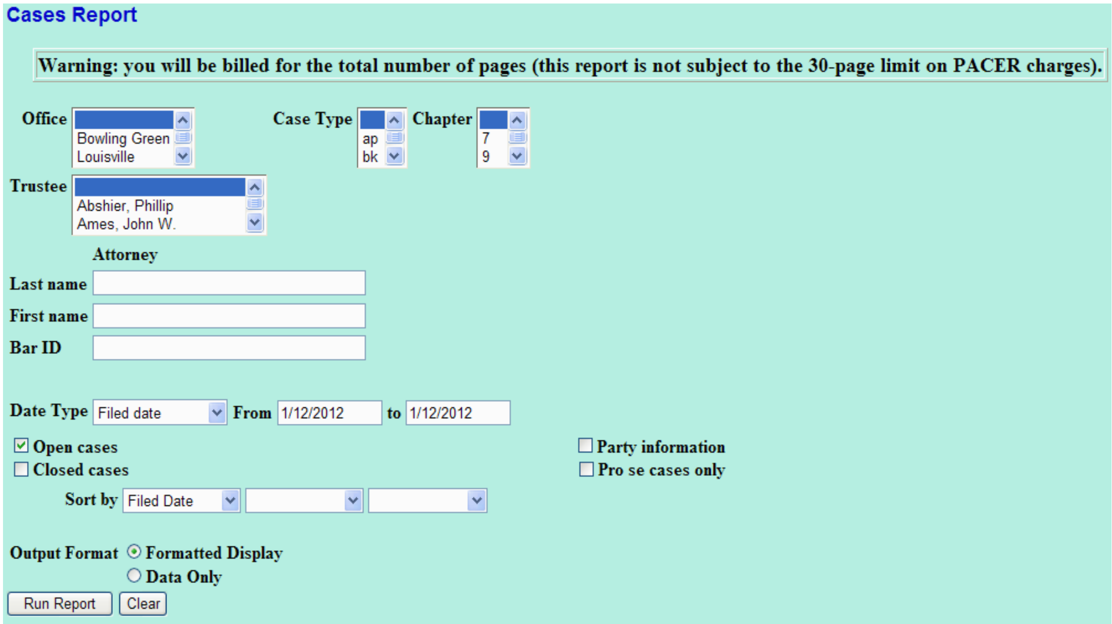

Figure 4

◆ The following fields are available for selecting/entering criteria for generating the Cases Report:

- **Office** – Allows you to specify the divisional office activity you want cases to be included on the report. The default is all offices.
- **Case Type** – The choices are **ap** - Adversary Proceedings or **bk** - Bankruptcy The default is all cases.
- **Chapter** – Cases can be selected by Chapter **7**, **9**, **11**, **12**, **13**, **15** or **304**. The default is all chapters.
- **Trustee** - List of trustees. The default is blank for all.
- **Attorney** - Search cases for a specific attorney
- **Date Type** – Allows you to specify which date is used when generating the report. The choices are **Filed**, **Entered**, **Discharged**, **Dismissed**, **Closed**, or **Converted**. The default is Filed Date.
- **From/to** – Enter a beginning and/or ending date. The default is the current date. For one day's activity, the dates

should be the same in both fields. Enter dates by MM/DD/YY or MM/DD/YYYY.

- **Open cases** – You can restrict activity by open or closed cases. A check mark is defaulted in this box.
- **Closed cases** – The option to include or exclude closed cases is available. The default in this box is no Closed cases.
- **Party information** – Placing a check mark in this box will allow you to include additional party information along with each party(s) name (i.e., address, SSN, and TAX ID).
- **Pro se cases only** - Search for Pro se cases only.
- **Sort by** – Allows you to select up to three sorting order sequences for the report. The choices are **Filed Date**, **Entered Date**, **Case Number**, **Case Type**, **Office or Trustee**. The default is Filed Date.
- **Output Format** - Formatted Display or Data Only.

◆ The **[Clear]** button will reset all fields to their default values.

◆ After entering your criteria, click on the **[Run Report]** button.

STEP 5 The **CASES REPORT** displays next. **(See Figure 5a.)** All reports can be printed by clicking on the browser's Print button.

Cases Report for 1/12/2012

U.S. Bankruptcy Court

Western District of Kentucky

Case No. Related Case Info	Tp	Ch	Party Info	Judge Trustee	Dates	Other Info
12-03001 *Lead BK:* 11-30044 Steven Raymond Tyler *Chapter:* 13	ap		Tyler v. Ford Motor Credit Company Attorney for Plaintiff: S M Craven Defendant: Pro se	Fulton	*Filed:* 01/12/2012 *Entered:* 01/12/2012	*Office:* Louisville
12-30001	bk	11	American Express Travel Related Serv Debtor: Pro se		*Filed:* 01/12/2012 *Entered:* 01/12/2012	*Office:* Louisville *Fee:* Paid *County:* JEFFERSON-KY

Total number of cases: 2

Open cases only

Figure 5a

- The following information will be displayed on the Cases Report:

  - **Case No./Related Case Info** – Displays the assigned case number, chapter, and debtor. Clicking on the case number hyperlink will allow you to generate a Docket Report.

    If the Case Type is an Adversary Proceeding **(ap)**, the “Lead” case number appears beneath the adversary case number hyperlink.

  - **Tp** (Type Proceeding) – Displays either **ap** or **bk**.

  - **Ch** (Chapter) – Displays either **7**, **9**, **11**, **12**, **13**, **15** or **304**.

  - **Party Info** – Displays the debtor (and joint debtor) information for bankruptcy cases. Plaintiff information will also be displayed for **ap** cases. An additional row will be displayed for some lead bankruptcy case information.

  - **Judge/Trustee** – If there is a trustee on a bankruptcy case, the name appears directly below the judge’s name.

  - **Dates** – Date information will include the dates the proceedings were either **Filed**, **Converted**, **Dismissed**, **Discharged**, **Closed**, or **Entered**.

  - **Other Info** – Other information may include the divisional office, asset designation, fee status and county.

- Clicking on any of the Case Number hyperlinks will display the

DOCKET SHEET screen, allowing you to enter criteria for generating the Docket Report. **(See Figure 5b.)**

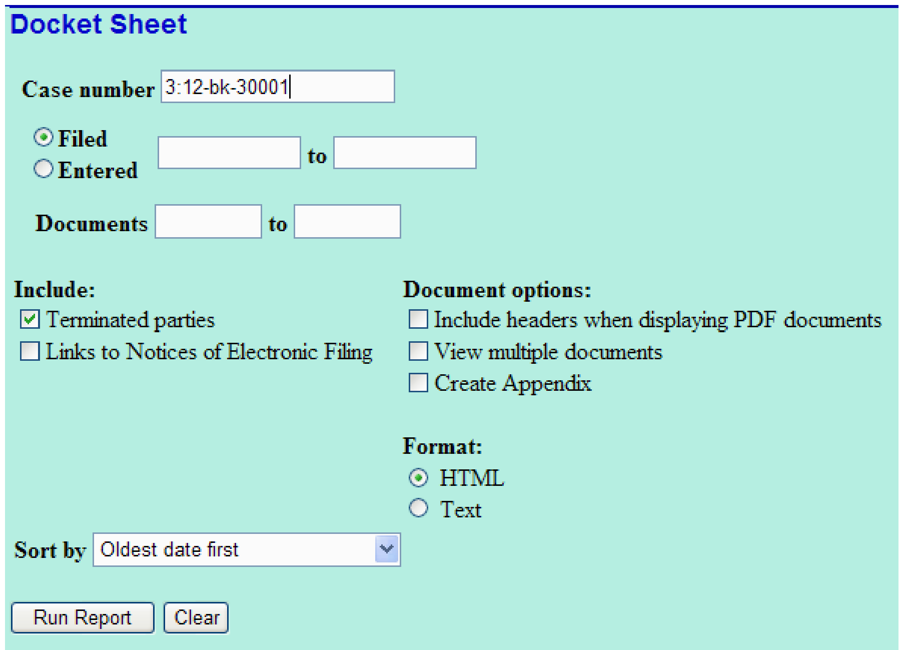

Figure 5b

NOTE: Refer to the **DOCKET REPORT** module in your CM/ECF Student Guide for more information on the Docket Report.