

Batch and Multi-Case Processing

For Trustees & Attorneys

CM/ECF Batch and Multi-Case processing were developed to expedite the filing of multiple documents. Both processes file the same type of document to different cases in one operation.

The basic difference is that the Batch feature offers the association of a different PDF file for each case and Multi-Case will use the same PDF for each case. This feature can expedite case administration for attorneys, trustees and court users.

Batch Filings (See **STEP 9** for the Multi-Case Process.)

This feature allows different case numbers and names as well as standard language to appear on each pleading. Each PDF file, although the same type of entry, can be filed in volume by the Trustee's office (or the court) more efficiently. The following steps illustrate the batch process.

STEP 1 Click the [Bankruptcy](#) hyperlink on the CM/ECF Main Menu. (See Figure 1.)



Figure 1

STEP 2 The **BANKRUPTCY EVENTS** screen displays. (See Figure 2.)

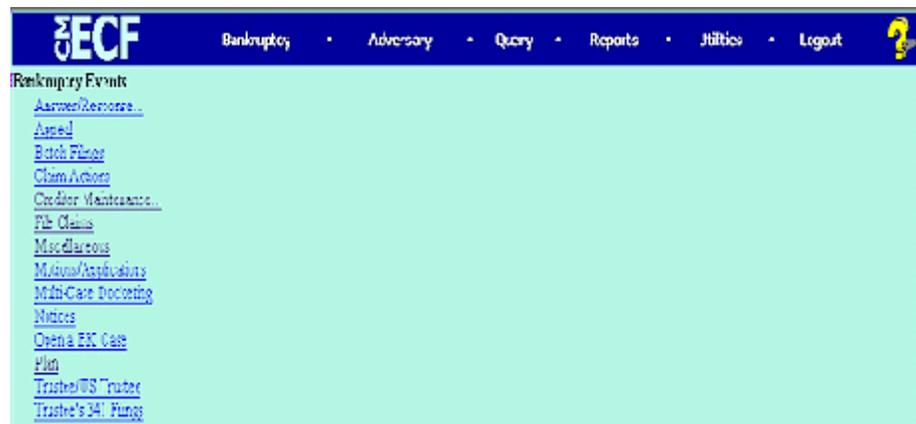


Figure 2

- ◆ Select Batch Filings.

STEP 3 The **CASE NUMBER** screen will appear. (See Figure 3.)



Figure 3

- ◆ Each case number should be typed in this extended window.

HELPFUL HINT:

Highlight the list with your mouse, right click and choose Copy (or use the keystroke **[Ctrl] + C**).

If any of the case numbers are invalid, an error message appears and the valid case numbers already entered will be lost. If that happens, at the case number field, one can easily right click with the mouse and chose Paste (or use the keystroke **[Ctrl] + V**). Then make any changes needed to the incorrect case number.

- ◆ After successfully entering all of the target case numbers, click **[Next]**.

STEP 4 The **DOCUMENT SELECTION** screen is presented next. (See Figure 4.)

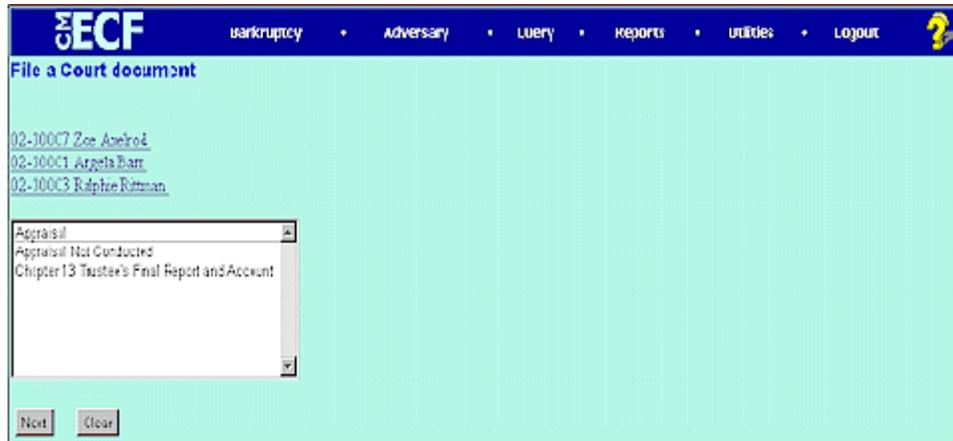


Figure 4

- ◆ Each case number and title will appear above the document window as a hyperlink to the docket report. This is an opportunity to verify the case before proceeding.
- ◆ Select the type of document to file from the list and click **[Next]**.

STEP 5 The **PDF DOCUMENT ASSOCIATION** screen displays with a Browse window for each of the target cases. (See Figure 5.)

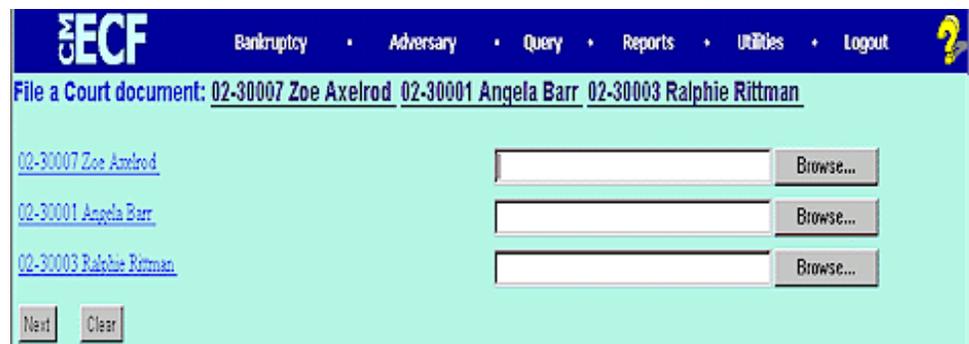


Figure 5

- ◆ For each case, click **[Browse]**, then navigate to the directory where the PDF file for this filing is located or type the file path in the text box.
 - For quality control purposes it is recommended that each

file be opened to verify its contents before proceeding:

- Highlight the PDF file with a right click of your mouse.
 - Select Open to bring up the document for viewing and verification. Close the file and select it, if correct.
- ◆ Continue with each file in the list.
 - ◆ Click [**Next**] to continue.

STEP 6 The **MODIFY DOCKET TEXT** screen displays. (See Figure 6.)

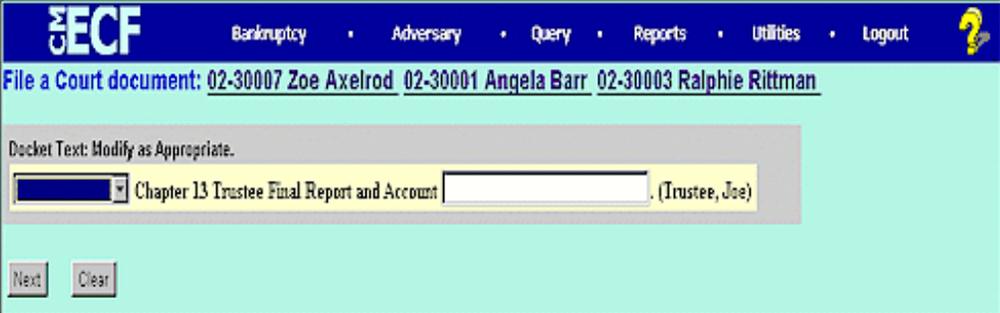


Figure 6

- ◆ Complete the docket text with the appropriate descriptive detail, if applicable.
- ◆ Click [**Next**].

NOTE: Any modifications to the docket text will apply to **all** cases included in this filing.

STEP 7 The **DOCKET TEXT** window is presented next. (See Figure 7.)

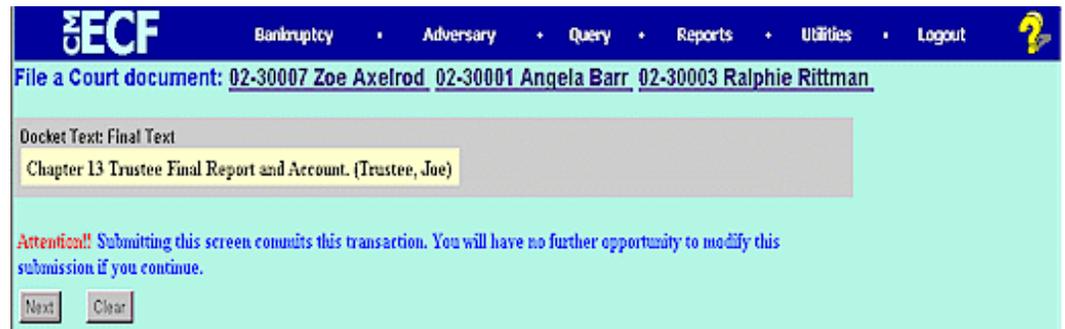


Figure 7

- ◆ Verify the accuracy of the docket text. This is what will print on the docket sheet.
- ◆ If the docket text has a significant error, click the browser's **[Back]** button at the top of the screen one or more times to access the screen that caused the error, and correct it.
- ◆ To abort or restart the transaction, click on the [Bankruptcy Events](#) hyperlink on the **CM/ECF Main Menu Bar**. Although this can be done at any time, this is your last opportunity to change the event.
- ◆ If the docket text is correct, click **[Next]** to continue.

STEP 8 One **NOTICE OF ELECTRONIC FILING** will be generated for all the cases in this transaction. (See Figure.)

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

File a Court document: 02-30007 Zoe Axelrod 02-30001 Angela Barr 02-30003 Ralphie Rittman

Notice of Electronic Filing

The following transaction was received from Trustee, Joe entered on 4/23/2002 at 12:45 PM EDT and filed on 4/23/2002

Case Name: Zoe Axelrod
Case Number: [02-30007](#)
Document Number: [5](#)

Case Name: Angela Barr
Case Number: [02-30001](#)
Document Number: [16](#)

Case Name: Ralphie Rittman
Case Number: [02-30003](#)
Document Number: [7](#)

Docket Text:
Chapter 13 Trustee Final Report and Account. (Trustee, Joe)

The following document(s) are associated with this transaction:

Case Number: 2-30007
Document description:
Original filename: S:\Training\PDF_ECF_Training\Document.pdf
Electronic document Stamp:
[STAMP MiscStamp_ID=996699402 [Date=4/23/2002] [FileNumber=444-0] [65c051059aa85442aa97e04653c8c961e805e4e7202439b3d6b2815445e627a675ead5f90a4e304c28cc77b6727cda52606db8cc63a5e0c0db1aec6c9f964]]

Case Number: 2-30003
Document description:
Original filename: S:\Training\PDF_ECF_Training\Document.pdf
Electronic document Stamp:
[STAMP MiscStamp_ID=996699402 [Date=4/23/2002] [FileNumber=445-0] [549ebb0988835545c4793cf4489265574e177e081b6f1d5849a53b4685b9eb219a2424139356857232c456d225f10a513a15f175ecb534152b96404766cd1]]

02-30007 Notice will be electronically mailed to:

02-30007 Notice will not be electronically mailed to:

Christy Adams
601 W Broadway #450
Louisville, KY 40202

Julie Brown Apperson
7002 Woods Club Ct
Louisville, KY 40241

02-30001 Notice will be electronically mailed to:

Christy Adams
601 W Broadway #450
Louisville, KY 40202

Thomas W. Frenz
2500 Brown & Williamson Tower
Louisville, KY 40202

02-30003 Notice will be electronically mailed to:

02-30003 Notice will not be electronically mailed to:

Christy Adams
601 W Broadway #450
Louisville, KY 40202

Julie Brown Apperson
7002 Woods Club Ct
Louisville, KY 40241

Figure 8

- ◆ All case data will be combined on this one Notice of Electronic Filing. All case numbers, title and document numbers will be grouped together. The electronic document stamp and document description will be listed for each case. And finally, the electronic mailing information for parties on each case will be listed by case. **(See Figure 8.)**

- ◆ It is suggested that this notice be printed or saved to a file in a common directory on the network.

Multi-Case Filings

To expedite and streamline the exact same entry to multiple cases the **Multi-Case** function was created. Typical uses for this function are the **Trustee's No Asset Report**, as in this example.

This type of filing must contain standard "boiler plate" language which would apply to every case included in the process because the document and docket text will be identical in each case. The filer option could be used to identify each trustee by name if not already included in the docket text.

STEP 9 The **Multi-Case** category is a separate selection on the **BANKRUPTCY EVENTS** screen. (See Figure 9.)

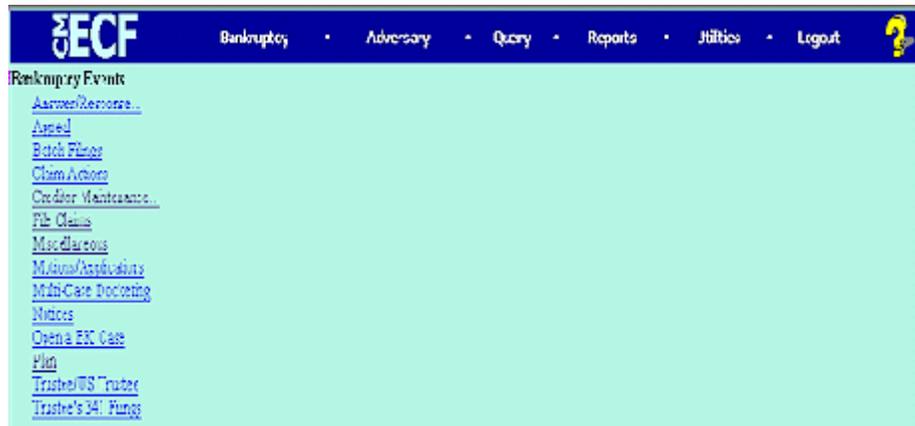


Figure 9

- ◆ Select Multi-Case Docketing from the Bankruptcy Events menu.

STEP 10 The **CASE NUMBER** screen appears. (See Figure 10.)

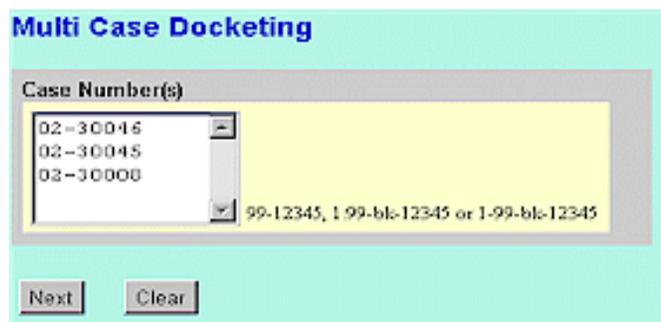


Figure 10

- ◆ Each case number should be typed in this extended window.

NOTE: If this entry will be filed in many cases, it is suggested that one type the list of case numbers in WordPerfect or other word processing program first.

In WordPerfect, highlight the list with your mouse, click on Edit on the browser menu bar and choose Copy (or use the keystroke **[Ctrl] + C**).

Toggle back **[Alt + Tab]** to CM/ECF and position the cursor within the Case Number box. Click on Edit on the menu bar and choose Paste (or use the keystroke **[Ctrl + V]**.)

If any of the case numbers are erroneous an error message appears and the valid case numbers already entered will be lost. If that happens, one can easily go back to the WordPerfect list **[Alt + Tab]** and make the change(s) in the list without having to type in all the case numbers individually again.

- ◆ After entering all of the target case numbers, click **[Next]**.

STEP 11 The **DOCUMENT SELECTION** screen is presented next.
(See Figure 11.)

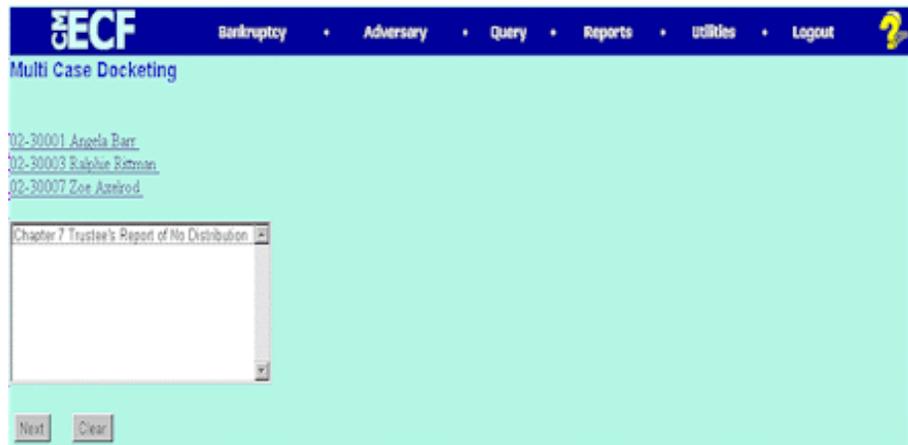


Figure 11

- ◆ Each case number and title will appear above the document window as a hyperlink to the docket report. This is an opportunity to verify each case before proceeding.

- ◆ Select the Type of document to file from the list and click **[Next]**.

STEP 12 The **PDF DOCUMENT SELECTION** screen appears.
(See Figure 12.)

 No Yes'. At the bottom, there are 'Next' and 'Clear' buttons." data-bbox="322 231 946 401"/>

Figure 12

- ◆ The file date and the EOD date as well as the document number for each case will appear in a subsequent screen, the **Notice of Electronic Filing**.
- ◆ To link a PDF file:
 - Click **[Browse]**, then navigate to the directory where the PDF file is located or type in the entire drive and directory path.
 - Click the PDF file to select it. ALWAYS right click to open the file and verify that this is the correct PDF document to associate with this filing.
 - Click **[Next]**.

STEP 13 The **MODIFY DOCKET TEXT** screen displays. (See Figure 13.)

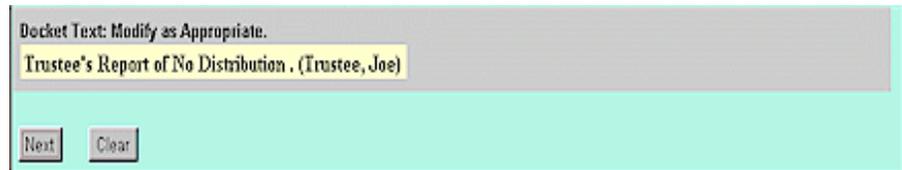


Figure 13

- ◆ Click [**Next**] to continue

STEP 14 The **FINAL DOCKET TEXT** window is presented next. (See Figure 14.)

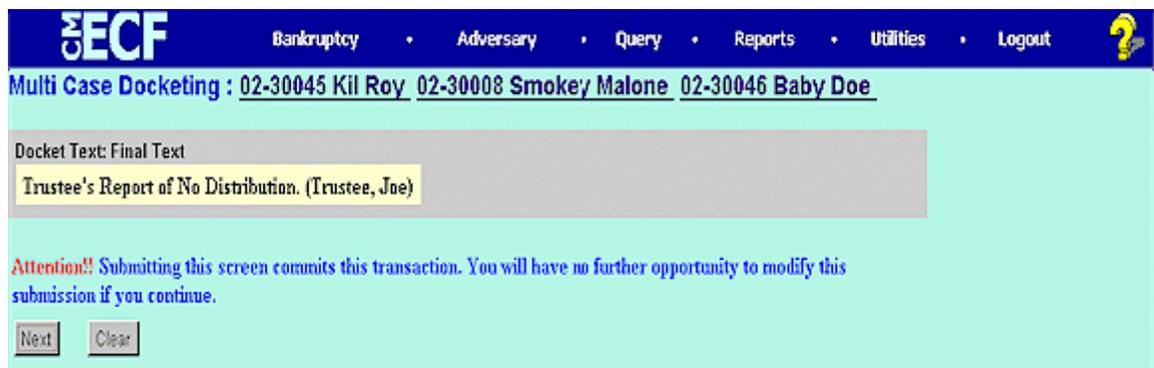


Figure 14

- ◆ To modify a previous screen click on the browser [**Back**] button to find the screen to correct the error.
 - ◆ To abort this transaction, (at any time up until this last screen) click on *any* of the hyperlink menu selections on the CM/ECF main menu bar. This will prevent this filing from being sent to the court's database.
 - ◆ If the final text is correct, click [**Next**] submit these entries to the database. The next sequential document number will be assigned in each respective case.

- STEP 15** One **NOTICE OF ELECTRONIC FILING** will be generated for all the cases in this transaction. (See Figure 15.)

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout ?

Multi Case Docketing : 02-30045 Kil Roy 02-30008 Smokey Malone 02-30046 Baby Doe

Notice of Electronic Filing

The following transaction was received from Trustee, Joe entered on 4/25/2002 at 1:52 PM EDT and filed on 4/25/2002

Case Name: Kil Roy
Case Number: [02-30045](#)
Document Number: [3](#)

Case Name: Smokey Malone
Case Number: [02-30008](#)
Document Number: [3](#)

Case Name: Baby Doe
Case Number: [02-30046](#)
Document Number: [3](#)

Docket Text:
Trustee's Report of No Distribution. (Trustee, Joe)

The following document(s) are associated with this transaction:

Document description: Main Document
Original filename: S/Training/PDF_ECF_Training/Tr Report of No Distribution.pdf
Electronic document Stamp:
[STAMP bkcertStamp_ID=996699402 [Date=4/25/2002] [FileNumber=464-0] [1e953dbee83702f468a494dedd3c1fa4208041d672907819ed326d6b1bat8d26feafcd5883d3a42abf1df8c7b692f744882491140d7889967b88d6bb68]]

Figure 15

- ◆ All case data will be combined on this one Notice of Electronic Filing. All case numbers, title and document numbers will be grouped together. If a PDF document is used, the **same** electronic document stamp and document description will be listed for each case. And finally, the electronic mailing information for parties on each case will be listed by case.

- ◆ It is suggested that this notice be printed or saved to a file in a common directory on the network.