

Docket Report

For Trustees and Attorneys

This lesson describes the public Docket Report, sometimes called a Docket Sheet, and how it can be generated.

Internet users will access CM/ECF through PACER and will use two different sets of logins and passwords; one for CM/ECF filing and the other for PACER access to queries and reports.

This module will assume that the internet user has accessed the court's web site with their court assigned CM/ECF login and password.

STEP 1 After you have logged in to CM/ECF, 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 [Docket Report](#) hyperlink.

STEP 3 The **PACER LOGIN** screen displays (See Figure 3).

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

PACER Login

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

Instructions
Enter your ECF login and password for electronic filing capabilities. If you do not need filing capabilities, enter your PACER login and password. If you do not have a PACER login, contact the PACER Service Center to establish an account. You may register online at <http://pacer.psc.uscourts.gov> or call the PACER Service Center at (800) 676-6836 or (210) 301-6440.

An access fee of \$.07 per page, as approved by the Judicial Conference of the United States at its September 1998 session, will be assessed for access to this service. All inquiries will be charged to your PACER login that is kept on file. If you do not need filing capabilities, enter your PACER login and password. The Client code is provided to the PACER user as a means of tracking transactions by client. This code can be up to thirty two alphanumeric characters long.

Authentication

Login:

Password:

Client code:

Make this my default PACER login

Figure 3

NOTE: Access to any CM/ECF queries or reports by non-court users must be through the Public Access to Court Electronic Records (PACER) program. If you have not done so already, you must register with the PACER Service Center to be given a login and password. Note the information that is provided to users on the screen above.

- ◆ Enter your **PACER Login** and **Password**. (These fields are case sensitive).
- ◆ Enter the **Client Code** (optional). 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.

- ◆ Click on the **[Login]** button.

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

The screenshot shows the 'Docket Sheet' selection screen. It features a blue header with the CM/ECF logo and navigation links: Bankruptcy, Adversary, Query, Reports, Utilities, Logout, and a help icon. The main content area is titled 'Docket Sheet' and contains several input fields and checkboxes. There is a 'Case number' text box. Below it are radio buttons for 'Filed' (selected) and 'Entered', each followed by a date range 'to' text box. There is a 'Documents' text box with a 'to' text box. Below these are two checkboxes: 'Include terminated parties' (checked) and 'Include links to Notice of Electronic Filing' (unchecked). There are radio buttons for 'HTML' (selected) and 'Text'. A 'Sort by' dropdown menu is set to 'Oldest date first'. At the bottom are 'Run Report' and 'Clear' buttons.

Figure 4

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

- **Case number** – The number of the last case you accessed during the current CM/ECF session appears automatically. Type another case number if you want to view the docket report for a different case. This is a required field.
- **Entered/Filed** – To limit which entries are shown by date, select either “Entered” (when the entry was recorded by the court in CM/ECF) or “Filed” (when the document was filed).

Enter the start and stop date in the format mm/dd/yy or mm/dd/yyyy.

You can enter a start date with no end date, which will include all entries from the date specified onward, or you can enter an end date with no start date, which will include all entries up to the specified date. If no dates are entered, all entries will be selected.

- **Documents** – To limit entries by document number, enter the beginning and ending numbers. This feature enables users to be charged only for the desired data on large cases.
- **Include terminated parties** – A check mark in this box will include any parties that have been terminated from the case. Uncheck the box to show only current parties in the case.

- **Include links to Notice of Electronic Filing** - A check mark in this box will cause the docket sheet to include a “silver ball” link back to a copy of the Notice of Electronic Filing that was created when the event was originally filed.

- Preferred format:
 - HTML** - Format for Netscape or other ISP (Internet Service Provider) e-mail service. Hyperlink provided.

 - OR

 - TEXT** - Format for cc:Mail, GroupWise, or other non-ISP e-mail service. Hyperlink will not be provided.

- **Sort by** – This selection allows you to sort the entries in the report by:
 - Oldest date first
 - Most recent date first
 - Document number ascending
 - Document number descending.

These selections can affect the number of pages displayed and PACER charges and may be changed if you are interested only in the most current activity.

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

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

◆ **STEP 5:** The **DOCKET REPORT** displays (See Figure 5a):

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

U.S. Bankruptcy Court
Systems Deployment and Support Division (Pleasantville)
Bankruptcy Petition #: 02-10005

Assigned to: Charles Anderson *Date Filed:* 08/27/2002
 Chapter 7
 Voluntary
 No asset

Annie Hall represented by **Henry Herkelmeyer**
 302 W. Laurel Drive
 Terrell Hills, TX 78202
 SSN: 159-85-9874
Debtor Henry Herkelmeyer and Associates
 4501 Main Ave.
 Suite 120
 San Antonio, TX 78201
 210-555-4141
 Fax : 210-555-4242
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Julian Mayfair
 Office of the U.S. Trustee
 413 E. Court Street
 Mobile, AL 33012
Trustee

Zane Woodring
 Woodring, Kraft & Miller
 142 E. Milk Street
 Boston, MA 02144
 520-555-7841
U.S. Trustee

Filing Date	#	Docket Text
08/27/2002	1	Chapter 7 Voluntary Petition. Receipt Number cc, Fee Amount \$200 Filed by Annie Hall (Wilson, Dana) (Entered: 08/27/2002)
08/27/2002		First Meeting of Creditors with 341(a) meeting to be held on 10/14/2002 at 09:00 AM at Room 101 U.S. Trustee's Office. Objections for Discharge due by 12/13/2002. (Wilson, Dana) (Entered: 08/27/2002)
08/27/2002	2	Notice of Appearance and Request for Notice by Robin Zenzen Filed by Creditor Design Concepts, Inc. (Wilson, Dana) (Entered: 08/27/2002)

Figure 5a

NOTE: Any “Case Flags” pertaining to the status of the case will be displayed at the top-right corner of the report. This particular case has one (1) flag indicating that Fee Installment Payments are due.

- ◆ Clicking on a “blue” document number hyperlink from the docket report will first display a transaction receipt indicating a billable amount if the user decides to accept the charges and view the PDF document. (See Figure 5b).

Figure 5b

NOTE: The opportunity to review charges **FIRST** applies to PDF documents only.

- ◆ If you choose to accept the charges, click on the **[View Document]** button to view the associated PDF document and the selected document will be displayed. (See Figure 5c).

Figure 5c

- ◆ After viewing the PDF document, either click on the **[Back]** icon of your internet browser's tool bar or close Acrobat Reader to return to the previously displayed screen.

NOTE: DO NOT exit out of your document reader by using the Close "X" button at the top-right corner of your screen. This will exit you out of CM/ECF.

- ◆ A separate Transaction Receipt will be displayed at the end of the docket report indicating the number of billable pages for the report. (See Figure 5d).

PACER Service Center			
Transaction Receipt			
09/05/2002 09:26:15			
PACER Login:	ao0055	Client Code:	
Description:	Docket Report	Case Number:	02-10005
Billable Pages:	1	Cost:	0.07

Figure 5d