

---

---

## Quick Reference Guide for Creditor Attorneys

---

---

### Section I: Accessing the CM/ECF System

Step 1: Click on [CM/ECF](#) hyperlink on the Iowa Northern Home Page.

Step 2: Enter CM/ECF Login and Password on ECF/Pacer Login Screen.

**NOTE:** The first time a Registered User attempts to view any reports within the CM/ECF system, the PACER Login Screen will appear. Below the PACER Login and Password box is a check-box prompt asking if you would like to store the login as the default PACER login. By selecting this box, you will only have to log into the CM/ECF system at the start of your session and the PACER login will be automatically entered when you attempt to run reports.

### Section II: Filing A New Adversary Case

- Step 1. Click on the [Adversary](#) Hyperlink on the CM/ECF Main Menu
- Step 2. Click [Open an AP case](#)
- Step 3. Select “Y” or “N” from the Complaint Drop Down Box
- Step 4. Add Lead BK Case Number, select Association type, and click Next.
- Step 5. Enter Plaintiff name and click on Search button. Select name from list if Party found. If name does not appear after search, click on Create a new Party.
- Step 6. Fill in Party information, indicate role in Main BK Case
- Step 7. Add yourself as attorney for plaintiff by clicking “Add Attorney” and searching for your name. When your name appears, click “Select Name From List,” verify your office information, and click “Add Attorney.” When you have returned to the Party Information screen, click Next.
- Step 8. If there are more plaintiffs to be added, repeat steps 4-6.
- Step 9. When all plaintiffs have been added, click “End Plaintiff Selection.”
- Step 10. Enter the defendant’s name and click Search. Select name from list if party’s name is found. If name does not appear after search, click “Create New Party.”
- Step 11. Fill in party information, indicate role in Main BK Case and click on Submit. **Note: do not add an attorney for defendant at this time.**
- Step 12. After all Defendants have been added, Click “End Defendant Selection.”
- Step 13. Select whether US is a party, and choose Nature(s) of Suit (up to 5), Jury Demand, Demand, Indicate Whether Issue is a Substantive Matter of State Law, and click Next.
- Step 14. Browse and select pdf document
- Step 15. Follow instructions on the receipt screen
- Step 16. The docket text screen displays; modify as appropriate and click Next.
- Step 17. The Final submission screen appears; read over your text carefully to verify it is correct. If necessary, use your browser back button to find the screen to be modified, or click the Adversary hyperlink to abort and start over. When your text is correct, click next.
- Step 18. After the Notice of Electronic Filing appears, a smaller dialog box will pop up over the main

---

---

## Quick Reference Guide for Creditor Attorneys

---

---

CM/ECF window. This dialog box will list the fee for the document just filed (along with any other fees incurred but not yet paid). The buttons at the bottom of the dialog box offer two choices: Pay Now or Continue Filing. If you select “Pay Now,” simply follow the prompts and enter your credit card information. Selecting “Continue Filing” allows you to file multiple documents and make one payment at the end of your CM/ECF session.

### **Section III: Filing a Summons Service Executed**

- Step 1. Click on the [Adversary](#) hyperlink in the CM/ECF main menu
- Step 2. Click on [Complaint & Summons](#)
- Step 3. Enter the adversary case number and click Next.
- Step 4. Select “Summons Service Executed” from the document selection box and click Next.
- Step 5. Browse and select your PDF document
- Step 6. Select the party or parties on whom the summons was served and click Next
- Step 7. Enter the date served if the default date is not correct; click Next
- Step 8. The docket text screen displays; modify as appropriate and click Next
- Step 9. The Final submission screen appears; read over your text carefully to verify it is correct. If necessary, use your browser back button to find the screen to be modified, or click the Adversary hyperlink to abort and start over. When your text is correct, click next. Your Notice of Electronic Filing screen appears and your transaction is complete.

### **Section IV: Filing an Answer to a Complaint**

- Step 1. Click on the [Adversary](#) hyperlink on the CM/ECF main menu bar
- Step 2. Click on [Answer](#)
- Step 3. Click on Complaint, 3rd , Cross, Counter
- Step 4. Enter or verify adversary case number and click Next
- Step 5. Verify Case name and case number and click on the Next button
- Step 6. Select the party you represent on the party selection screen and click Next.
- Step 7. Check box for party/attorney association and click Next
- Step 8. Check the box for the complaint and click Next
- Step 9. Associate document and click Next
- Step 10. If answer contains a Third-Party Complaint, a Cross-Claim or a Counterclaim check the appropriate box; if not, click Next
- Step 11. Edit docket text if necessary and click Next
- Step 12. Verify Docket text and click Next.

---

---

## Quick Reference Guide for Creditor Attorneys

---

---

### **Section V: Filing a Proof of Claim When the Creditor is Already on the Case**

- Step 1. Click on [Bankruptcy](#) in the CM/ECF main menu
- Step 2. Click on [File Claims](#)
- Step 3. Verify or type in case number. Click on Next button.
- Step 4. Select name of Creditor from the drop down menu and verify the address. If address matches, click Next. If address does not match, see Section VII “Modifying Creditor Information.”
- Step 5. Enter the data in the appropriate fields for the claim. Do not enter the "\$" or commas in the dollar amount fields. Type in the exact amount on the claim, tab through and click on the Next button
- Step 6. Browse for the pdf document and then click Next button
- Step 7. Notice of Electronic Claims Filing displays.

### **Section VI: Filing a Proof of Claim When the Creditor is Not On the Case**

- Step 1. Click on [Bankruptcy](#) in the CM/ECF main menu
- Step 2. Click on [File Claims](#)
- Step 3. Verify or type in case number. Click on Next button
- Step 4. Verify case name and number and then review for creditor in the drop down menu. If creditor not there, then click on Add Creditor.
- Step 5. Verify case number and click on Next button
- Step 6. Type in the name and address of the Creditor (you may enter more than one creditor here, but each creditor name must be separated by at least one line)
- Step 7. Screen shows you number of creditors entered. If this is correct, click on Submit.
- Step 8. Verify case number and name and click on File a Proof of claim
- Step 9. Verify case number at Search for Creditor screen and click Next.
- Step 10. Select creditor from the drop down menu. Verify creditor and click on the Next button.
- Step 11. Enter the data in the appropriate fields for the claim. Do not enter the "\$" or commas in the dollar amount fields. Type in the exact amount on the claim, tab through and click on the Next button
- Step 12. Browse for the pdf document and click Next.
- Step 13. Notice of Electronic Claims Filing displays.

---

---

## Quick Reference Guide for Creditor Attorneys

---

---

### Section VII: Modifying Creditor Information

Creditor Information needs to be modified when the name or address of the creditor for whom you are filing a proof of claim does not match the information shown in CM/ECF.

Step 1: Click on the [Bankruptcy](#) hyperlink (or select “Edit Creditor” from within the File a Claim Entry)

Step 2: Click on [Creditor Maintenance](#)

Step 3: Click on Edit Creditors

Step 4: Enter in the case number and the name of the creditor you wish to edit, and click the “Edit a Creditor” radio button. Click Next.

Step 5: Edit the creditor information and click Submit

### Section VIII: Filing a Motion

Step 1: Click on the [Bankruptcy](#) or [Adversary](#) hyperlink.

Step 2: Choose [Motions/Applications/Objections to Exemptions](#) (or “Motions” if you are in the Adversary Category).

Step 3: Enter the case number and click Next.

Step 4: Highlight the appropriate document title in the document selection screen, click Next.

**Note:** Your case verification screen appears; the case title is a hyperlink to the docket sheet, should you wish to check it.

Step 5: Select the party who is filing the motion by highlighting their name, click Next.

**Note:** If your party is not listed, click [Add/Create New Party](#), enter in your search criteria to search the database, and if the party's name appears in the drop down list, highlight it and click [Select name from list](#). If your party does not appear in drop down list, you click “Add New Party” button and complete the demographic information for that party, making sure to identify that party's appropriate role from the drop down menu.

Step 6: The Attorney/Party Association Screen will appear if you have created a new attorney/party relationship. Check the box associating you with the client you have just entered, click Next.

Step 7: Browse to the appropriate location of the PDF document associated with this motion, right click and open your document to confirm you are associating the correct document. **Note:** This will launch Adobe Acrobat Reader to display the contents of the imaged document. Once you have verified that the document is correct, close or minimize Adobe and click Open in the file upload box. When the filepath is listed in the filename field, click Next.

Step 8: The docket text screen displays; modify as appropriate and click Next.

Step 9 : The final submission screen appears; read over your text carefully to verify it is correct. If necessary, use your browser "back" button to find the screen to be modified, or click the Bankruptcy hyperlink to abort and start over. When your text is correct, click Next.

Step 10: If this is a pleading which requires a fee, a smaller dialog box will pop up over the main CM/ECF window after the Notice of Electronic Filing appears. This dialog box will list the fee for the document just filed (along with any other fees incurred but not yet paid). The buttons at

---

---

## Quick Reference Guide for Creditor Attorneys

---

---

the bottom of the dialog box offer two choices: Pay Now or Continue Filing. If you select “Pay Now,” simply follow the prompts and enter your credit card information. Selecting “Continue Filing” allows you to file multiple documents and make one payment at the end of your CM/ECF session.

### **Section IX: Filing Other Documents**

Step 1: Click on the [Bankruptcy](#) or Adversary hyperlink.

Step 2: Choose [Other](#)

Step 3: Enter the case number and click Next.

Step 4: Highlight the appropriate document title in the document selection screen, click Next.

**Note:** Your case verification screen appears; the case title is a hyperlink to the docket sheet, should you wish to check it.

Step 5: Select the party who is filing the document by highlighting their name, click Next.

**Note:** If your party is not listed, click [Add/Create New Party](#), enter in your search criteria to search the database, and if the party's name appears in the drop down list, highlight it and click [Select name from list](#). If your party does not appear in drop down list, you click “Add New Party” button and complete the demographic information for that party, making sure to identify that party's appropriate role from the drop down menu.

Step 6: The Attorney/Party Association Screen will appear if you have created a new attorney/party relationship. Check the box associating you with the client you have just entered, click Next.

Step 7: Browse to the appropriate location of the PDF document associated with this document, right click and open your document to confirm you are associating the correct document. **Note:** This will launch Adobe Acrobat Reader to display the contents of the imaged document. Once you have verified that the document is correct, close or minimize Adobe and click Open in the file upload box. When the filepath is listed in the filename field, click Next.

Step 8: The docket text screen displays; modify as appropriate and click Next.

Step 9: The final submission screen appears; read over your text carefully to verify it is correct. If necessary, use your browser "back" button to find the screen to be modified, or click the Bankruptcy hyperlink to abort and start over. When your text is correct, click Next.

Step 10: If this is a pleading which requires a fee, a smaller dialog box will pop up over the main CM/ECF window after the Notice of Electronic Filing appears. This dialog box will list the fee for the document just filed (along with any other fees incurred but not yet paid). The buttons at the bottom of the dialog box offer two choices: Pay Now or Continue Filing. If you select “Pay Now,” simply follow the prompts and enter your credit card information. Selecting “Continue Filing” allows you to file multiple documents and make one payment at the end of your CM/ECF session.

## **Quick Reference Guide for Creditor Attorneys**

---

---

### **Section X: Running Reports**

#### **Cases Report**

- Step 1: Click on the [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 for Judge, Office, Case Type, Trustee, Chapter, Category and/or Event.
- Step 4: Type the date range in Date Entered fields to limit the report to a specific time period.
- Step 5: Click on drop-down menu(s) to select sorting method for report. Users are able to sort the report by two limiting factors to tailor the report to their individual needs.
- Step 6: 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 “Run Report”

#### **Claims Registers**

- Step 1: Click on the [Reports](#) or [Query](#) 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 “Run Report”
- Step 5: The Search Results Screen will display. Ensure that the radio button for “Claims Register” is selected, click Next.

### **Section XI: Queries**

#### Finding a Case Number/Case Information with Debtors Last Name

- Step 1: Click on the [Query](#) hyperlink on 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
- Note: This will bring you to the Query Screen specific to the case you have selected.

Selecting the Query that best suits your needs:

---

---

## Quick Reference Guide for Creditor Attorneys

---

---

[Alias](#) - Lists all parties in a case with aliases.

[Associated Cases](#) - Lists all cases associated with the case number you have queried (adversaries, etc.)

[Attorney](#) - Lists all attorneys who have appeared in the case.

[Case Summary](#) - Provides a snap-shot summary of case.

[Creditor](#) - Provides listing of selected creditor types (Administrative, 20 Largest, etc.).

[Deadlines/Schedules](#) - Shows all pending, due, set, terminated and satisfied deadlines for the case.

[Docket Report](#) - Shows the docket report for the case

[Filers](#) - Shows all of the parties in the case that have filed documents, party name is a hyperlink to the documents they have filed

[History/Documents](#) - Shows the events that were docketed with Filed and Entered dates.

[Notice of Bankruptcy Case Filing](#) - Printable document for notification of bankruptcy case filing.

[Party](#) - Provides a listing of all of the parties to a case and attorney representation for each

[Related Transactions](#) - Provides a listing of all docket transactions and the previous/subsequent actions to which they relate.

[Status](#) - Shows the current case status.

[Trustee](#) - Shows the Trustee assigned to the case.

[Claims Register](#) - Shows the claims register for the case

[Mailing Matrix by Case](#) - Allows easy access to a customizable mailing matrix for the case. Prints in 3 column format.

### **Section XII: Obtaining a Creditor Mailing Matrix**

Step 1: Click on the [Reports](#) or [Query](#) hyperlink on the CM/ECF Main Menu

Step 2: Select **Mailing Matrix By Case**

Step 3: Enter the case number; click **next** to generate the matrix

### **Section XIII: Obtaining a 2002 List**

Step 1: Click on the Query hyperlink on the CM/ECF Main Menu

Step 2: Enter the case number or the debtor's/party's last name

Step 3: Click **Run Query**

Step 4: Select **Creditors** from the Query selection screen

Step 5: In the "Creditor Type" drop down field, choose **Notice of Appearance** and click **next** to view the 2002 list