This docketing procedure provides step by step instructions for the filing of a new Adversary case and how to print the Summons document.

- Step 1 Click on the Adversary hyperlink on the blue CM/ECF Main Menu Bar.
- Step 2 Click on Open a Case-Adversary Proceeding. (See figure 1)



# Figure 1

Step 3 The Case Information Screen appears. The case type is programmed to "ap" and the Complaint box defaults to "y". The current date also appears. Leave this screen at the default unless you are filing a Notice of Removal then change the Complaint box to "n". Click next (See figure 2)





**Attorney Procedure** 

### **CM/ECF** Atty Training

Step 4The next screen gives information regarding the automatic issuance of<br/>the Summons and how to add yourself as attorney for the plaintiff in<br/>order for the Summons to be issued properly at the end of the opening<br/>of the new adversary case. Follow the instructions. Click next. (See<br/>figure 3)



Figure 3

Step 5The Search for a Plaintiff screen appears. Please remember to<br/>conduct a general search for the plaintiff's name in the CM/ECF<br/>database according to the Attorney Style Guide located on the Court's<br/>website. Click Search. (See figure 4)

<b>SECF</b>	Bankru	uptcy •	Adversary	Query	Reports	Utilities	Logout	- 🌮	2
Open Adversary	Case								
Search for a plaintiff									
SSN		Tax Id							
Last/Business name	CBS, Inc.								
First Name									
Middle Name									
Search Clear									

Figure 4

#### **CM/ECF** Atty Training

Step 6 The Plaintiff Information Screen appears. It is recommended that addresses not be added for parties other than dedendants. Click on the attorney box and search for yourself in order to associate yourself with the plaintiff as filer of the complaint. You will never have to add yourself to the database if a proper search is done. Always search and enter the plaintiff(s) first then enter defendants. The defendant will be entered as Pro Se at this time. The attorney will be added when and if they answer the complaint. Continue adding parties until all parties to the action have been added to the case. Click submit. (See figure 5)





Step 7The Nature of Suit screen appears. Select the correct options by<br/>making choices given in each drop down box. When completed click<br/>next. (See figure 6)

Open Adversary Case     Party code   US not a Party in the case I 11 (Objection / resocation of discharge - 727(c).(d).(e))     Rule 23 (class action)   Second nature of suit     for US not a Party in the case I 10 (Chipection / resocation of discharge - 727(c).(d).(e))   Second nature of suit     Jury demand   None I 10 (Chichargesbill)   For Unit nature of suit none     Demand 100   Fourth nature of suit none   Fourth nature of suit	🥜 🖗 🛛	• Logout	Utilities	•	Reports	•	Query	•	Adversary	٠	Bankruptcy	SECF
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**Attorney Procedure** 

Step 8The Lead Case Screen appears. Insert the related Bankruptcy Case<br/>number in the Lead case number field. Select the association type in<br/>the drop down box. If the adversary being filed is not a<br/>dischargeability complaint or an objection to discharge then simply<br/>select *related adversary*. Click next (see figure 7)



# Figure 7

- Step 9The Case Assignment screen appears. This screen only confirms the<br/>divisional office and Judge assignment based on the lead bankruptcy<br/>case number you just entered. Confirm this information is correct.<br/>Click Next.
- Step 10The next screen is where you Browse for the document you are filing.<br/>Make sure you select the correct document. Click Next.
- Step 11The next screen gives you information on payment of the filing fee.<br/>Review the information and click next.
- Step 12 The next 2 screens require no data input. Just click Next.

### **CM/ECF** Atty Training

Step 13The Final Text window appears. Review the entry *before* submitting<br/>for filing to be sure there are no errors. You will have no further<br/>ability to correct the transaction after you hit submit on this screen. If<br/>the entry is correct click Next. (See figure 8)





Step 14 The Summary of Current Charges Screen pops up on top of the Notice of Electronic Filing Screen. All pending fees will appear. Make a decision to "Pay Now" or "Continue Filing". For this exercise, we will click "Pay Now". (See figure 9)





**Attorney Procedure** 

- Step 15The next screen allows you to input your credit card<br/>information to pay the charges that have not been paid up to<br/>this point. Enter that information and click Continue With<br/>Plastic Card Payment.
- Step 16 An authorization screen appears and you are to click on the box that says you authorize this charge to your credit card. The screen will then process and then you will see information that the payment was received and completed. You can print this page for reference purposes if you choose to. Close the window.
- Step 17After the payment window is closed the Notice of Electronic<br/>Filing Screen appears in full and you will see that your filing<br/>entry has been completed. The new adversary case number is<br/>highlighted as a hyperlink. (See Figure 10)

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				U.S. B	ankru	ptcy Cou	rt							
				Western	Dist	rict of Te	cas							
Notice of Electroni	c Filing													
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Figure 10

Step 18Scroll down this screen until you see document number 2 highlighted.<br/>This is where your Summons is automatically generated and<br/>completed by the system. All you need to do is click on the hyperlink<br/>and print it in order to serve it on the defendant. (See Figure 11)



Figure 11

Step 19Once you have printed the Summons and completed the Service part<br/>of the document you will then file the 2 page Summons document as<br/>"Summons Served" under the Adversary options off the blue main<br/>menu bar.