



# Meeting with the Clerk

## November 4, 2016



- SURVEY MONKEY QUESTIONNAIRE
- UPDATING CM/ECF USER ACCOUNTS
- ADDING CREDITORS - STILL A PROBLEM
- CREATING AND ADDING CREDITOR PARTIES

# Survey Monkey Questionnaire



## ❖ What is this Survey?

- This survey is conducted in 4 phases to assist GA Northern in the cleanup of unused CM/ECF user accounts

## ❖ Why am I receiving this survey?

- In Phase I, you would have received the survey if you had one or more ECF user accounts that had not been used in more than two years.
- Phase II of this survey will begin soon. You will receive the survey if you currently have one or more live ECF user accounts which have been used within the past two years.

## ❖ How will this help?

- Currently, there are approximately 10,000 live ECF user accounts. It is estimated that more than half of these accounts are inactive or reflect out of date information.
- Responses to the Survey Monkey Questionnaire will assist in purging old accounts and updating existing accounts to ensure court records are perfected.
- Approximately 5000 user accounts will be disabled upon completion of this project

# Survey Monkey Questionnaire



- ❖ The email you receive will be sent via a secure link through Survey Monkey
  - **From: [noreply@ganb.uscourts.gov](mailto:noreply@ganb.uscourts.gov) via [surveymonkey.com](https://www.surveymonkey.com)**
  - **Sent by: [survey-noreply@smo.surveymonkey.com](mailto:survey-noreply@smo.surveymonkey.com)**
  
- ❖ To retain your ECF user account, you will be required to:
  - respond to the survey
  - answer all questions in the survey
  - agree to training as determined by the clerk's office
  - agree to receive notices via Reduced Paper Module ("RPM")
  - notify the clerk's office when there is a change to the information contained in your user account (i.e. change of firm name, address, etc.)

# Updating Your CM/ECF User Account



- ❖ As of November 7, 2016, you will no longer have access to make changes to the information reflected in your ECF account.
- ❖ You must notify the court via email immediately when any change or update is required to your ECF account. This information should be emailed to –

[ecf\\_helpdesk@ganb.uscourts.gov](mailto:ecf_helpdesk@ganb.uscourts.gov)

- ❖ You must notify the court of the following changes:
  - Changes to –
    - name of attorney
    - mailing address
    - telephone or fax
    - office/firm name
    - email (important for RPM notices!)
  - What case(s) are affected by this change
  - Effective date of change

# ADDING CREDITORS



- ❖ When adding creditors to a case, it is the filer's responsibility to add them timely and correctly
  
- ❖ There are two events to add creditors to a case after the voluntary petition has been filed –
  - Amendment to Schedules D,E,F and/or E/F (FEE)
    - Used when adding creditors through an amendment to schedules
  
  - Amended List of Creditors (FEE)
    - Used when filing the schedules to complete a skeletal petition and there are additional creditors listed in the original schedules that need to be added to the case

# ADDING CREDITORS



- ❖ Refer to the Online Procedures Manual to ensure your document meets all filing requirements prior to docketing

<http://www.ganb.uscourts.gov/Ops/OpsLive/OPSw-Home.htm>

- If filing an Amendment to Schedules D, E/F, do not forget to attach a **Supplemental List of Creditors** listing **ONLY** the creditors you are adding through the amendment.
- If filing an Amended List of Creditors, the list should **ONLY** list the creditors being added to the case.

# ADDING CREDITORS



❖ During the docketing process, you will be asked how you would like to add the creditor(s) –

- During the docketing process; or
- Using Upload List of Creditors file under Creditor Maintenance immediately after docketing the amendment

**Are you adding creditors? Remember - A cover sheet with specific information regarding creditors being added and a supplemental list of creditors with the names and addresses are required.**

- Yes - filer will enter all the creditor information now using this docket event to do so
- Yes - filer will access the Creditor Maintenance menu to upload a text file immediately after docketing the amendment
- No

Next

Clear

# ADDING CREDITORS



❖ If you choose to add the creditors during the docketing process, you must add them at this screen

- Prior to clicking “Next”, review all creditors to ensure they are entered correctly and no creditor has been missed
- You may verify the creditor(s) you entered/uploaded by Querying the case number and selecting “Creditors Entered by Date” – PACER FEES WILL APPLY

You are responsible for verifying these creditors are added correctly. Warning: Failure to add a creditor correctly may affect the discharge of the debt.

## Add Creditor(s)

*Name may be 50 characters. Address may be 5 lines, 40 characters each.  
More than one creditor may be entered. Separate creditors with a blank line.*

**Name and Address**

ABC Corp. 123 Main St. Anytown, GA 30000
Georgia Bank 1222 Oak St. Anytown, GA 30000

**Creditor type** Creditor ▾

**Creditor committee**  No  Yes

**Entity**

Next

Clear



# ADDING CREDITORS



❖ If you choose to add creditors after you have finished the docketing process using Creditor Upload

- REMEMBER: You **MUST** immediately add the creditors using [Upload List of Creditors File](#) under creditor maintenance.
- This is the #1 reason creditors do not get added – the filer simply forgets!
- The List of Creditors file must be saved in .txt format prior to uploading [ONLY include the creditors being added on this list]

## CREATING/ADDING A “Creditor” PARTY



- ❖ 99% of the time you should NOT have to create a new party record.
- ❖ From the Search results, find the creditor’s name which is an EXACT match. Choose a party record which does not contain any information.

Wells Fargo pty (1577313)  
Wells Fargo Bank N.A. cr (751755)  
Wells Fargo Bank N.A. cr (1304914)  
Wells Fargo Bank N.A. cr (1596940)  
Wells Fargo Bank NA cr (1514254)  
Wells Fargo Bank, N. A. cr (1231280)  
Wells Fargo Bank, N. A. cr (1240457)

# CREATING/ADDING A “Creditor” PARTY



- ❖ The only two things necessary for a creditor’s party record should be the creditor’s name and the role Type set to Creditor.
- ❖ Your creditor party screen should look like this:

Lock this account

Last name	Wells Fargo	First name	
Middle name		Generation	
Title		Type	Creditor
Office			
Address 1			
Address 2			
Address 3			
City			
Country			
Phone			
SSN/ITIN	999-99-9999	Tax ID/EIN	
Bar ID		Bar status	
Initials		Mail group	
	DOB	AO code	Person end date

Email information... More user information...

Submit Clear

# Helpful links, emails, telephone numbers



- ❖ Online Procedures Manual (Green “i”) -
  - ✦ <http://www.ganb.uscourts.gov/Ops/OpsLive/OPSw-Home.htm>
- ❖ CM/ECF Helpdesk email –
  - ✦ [ecf\\_helpdesk@ganb.uscourts.gov](mailto:ecf_helpdesk@ganb.uscourts.gov)
- ❖ CM/ECF Frequently asked questions –
  - ✦ [http://www.ganb.uscourts.gov/court-info/faq/cm\\_ecf\\_faqs](http://www.ganb.uscourts.gov/court-info/faq/cm_ecf_faqs)
- ❖ Laurie Davis – Quality Assurance Supervisor
  - ✦ [Laurie\\_Davis@ganb.uscourts.gov](mailto:Laurie_Davis@ganb.uscourts.gov)
  - ✦ 404-215-1290
- ❖ Daniel Newsome – CM/ECF Coordinator
  - ✦ [Daniel\\_Newsome@ganb.uscourts.gov](mailto:Daniel_Newsome@ganb.uscourts.gov)
  - ✦ 404-215-1099