

## Reports

Users can access several **Reports** created for **Electronic Case Filing (ECF)**. From the ECF system's *Main Menu*, click on the **Reports** hypertext link. A listing of available reports will be displayed.



**CASES** - The Cases Report generates Cases Filed, Entered, Discharged, Dismissed, Closed and Converted. You will be asked to enter your PACER login and password to view case information if you are not already logged into PACER.

**STEP 1** Click on the **Cases** hypertext link. The **Cases Report** screen will display.



 A screenshot of the 'Cases Report' form. The form has a title 'Cases Report' at the top. Below the title are several input fields: 'Office' (a dropdown menu with 'Bluefield' and 'Charleston' options), 'Case Type' (a dropdown menu with 'ap' and 'bk' options), and 'Chapter' (a dropdown menu with '7' and '9' options). Below these is a 'Trustee' dropdown menu with 'Barringer, J. W.' and 'Bush, Richard A.' options. Below the trustee field is a 'Date Type' dropdown menu with 'Filed Date' selected. To the right of the date type field are 'From' and 'to' date fields, both containing '10/14/2003'. Below these fields are two checkboxes: 'Open cases' (checked) and 'Closed cases' (unchecked). To the right of these checkboxes is a 'Party information' checkbox (unchecked). Below the checkboxes is a 'Sort by' dropdown menu with 'Filed Date' selected. At the bottom of the form are two buttons: 'Run Report' and 'Clear'.


 A screenshot of the 'Date Type' dropdown menu. The menu is open, showing a list of options: 'Filed Date', 'Entered Date', 'Discharged Date', 'Dismissed Date', 'Closed Date', and 'Converted Date'. A mouse cursor is pointing at the 'Entered Date' option.

- ◆ Pick the **Office** (division) or leave blank to run report for all divisions.
- ◆ Pick the **Case Type** or leave blank to run report for main case and ap's.
- ◆ Pick the **Chapter** or leave blank to run report for all chapters.
- ◆ Pick the **Trustee** or leave blank to run report for all Trustees.
- ◆ **Date Type**: Click on the arrow and choose type of report you want to run.
- ◆ **From** \_\_\_\_ **to** \_\_\_\_ - enter a start and ending date for the time frame you want the report to reflect (**required field**).
- ◆ Click on the **Run Report** button.

**STEP 2** The **Cases Report** for designated time will display.

Cases Report for 10/14/2003 U.S. Bankruptcy Court Southern District of West Virginia						
Case No. Related Case Info	Tp	Ch	Party Info	Judge Trustee	Dates	Other Info
<a href="#">2.03-bk-20007</a>	bk	7	Tom Wilson	Jones, Jr.	Filed: 01/14/2003	Office: Charleston Asset: No Fee: Paid County: Kanawha
<a href="#">2.03-bk-20009</a>	bk	7	H & L Towing	Jones, Jr.	Filed: 01/24/2003	Office: Charleston Asset: No Fee: Paid County: Kanawha
<a href="#">2.03-bk-20776</a>	bk	7	Henry Wadworth Watson	Standish	Filed: 04/24/2003	Office: Charleston Asset: No Fee: Paid County: Kanawha
<a href="#">2.03-bk-20778</a>	bk	7	Lisa Smith	Morris	Filed: 05/20/2003	Office: Charleston Asset: No Fee: Paid County: Kanawha

- ◆ Click on the hypertext link of the case you need to query. A hypertext link by default will be underlined and colored blue. The link will turn red after it has been accessed.

**STEP 3** The **Docket Sheet** selection screen will display.

**ECF** Bankruptcy

**Docket Sheet**

Case number

☒ **Filed**  to

☐ **Entered**  to

Documents  to

☒ Include terminated parties

☐ Include links to Notice of Electronic Filing

☒ **HTML**

☐ **Text**

Sort by

- ◆ For the complete docket sheet, leave **Filed/Entered** and **Documents** fields blank.
- ◆ Check the box to include links to terminated parties or Notices of Electronic filing if needed.
- ◆ Choose **Sort by** preference.
- ◆ Click on the **Run Report** button.

**STEP 4** The **Docket Sheet** will display.


**U.S. Bankruptcy Court**  
**Southern District of West Virginia (Charleston)**  
**Bankruptcy Petition #: 2:03-bk-20784**

Assigned to: Judge Ronald G. Pearson  
 Chapter 13  
 Voluntary  
 No asset  
 Date Filed: 05/28/2003

**Doris Marie Day**  
 One Hollywood Boulevard  
 Charleston, WV 25301  
 SSN: 444-44-4444  
*Debtor*

represented by **Scott G. Stapleton**  
 400 Fifth Avenue  
 Huntington, WV 25701  
 (304) 529-7391  
 Email: 2394

**Helen M. Morris**  
 P.O. BOX 8535  
 South Charleston, WV 25303  
 (304) 744-6730  
*Trustee*

Filing Date	#	Docket Text
05/28/2003	 1	Chapter 13 Voluntary Petition - all Schedules and Statements: Assets: \$62,000.00, Liabilities: \$94,000.00. Receipt # 44444, Fee Paid \$185.. (gjb, ) (Entered: 05/28/2003)

- ◆ Click on the document number to view the document.
- ◆ Click on the 'ball' to the left of the document number to view the Notice of Electronic Filing.

**Claims Register** - The Claims Register Report displays claims filed for a specific case.

**STEP 1** Click on **Claims Register** from the **Reports** Menu. The Claims Register selection criteria screen displays.

**ECF**

**Reports**

- [Cases](#)
- [Claims Register](#)
- [Docket Report](#)
- [341 Meetings / Hearings](#)
- [Docket Activity](#)

**New R3 Menu Items**

- [Written Opinions](#)

**Claims Register**

**Case number**

**Creditor type**

**Creditor name**

**Claim number**  to

☒ **Filed**  to   
☐ **Entered**

**Sort by**

- ◆ **Case Number** - enter Case Number in 'YY-NNNNN' format.
- ◆ Select optional case criteria to narrow search if preferred or leave remaining fields blank.
- ◆ Click on the **Run Report** button.

**STEP 2** The **Claims Register** for the desired case displays.

Southern District of West Virginia Claims Register		
<a href="#">2:03-bk-20784 Doris Marie Day</a> Judge Ronald G. Pearson Debtor Name: DAY,DORIS MARIE		
<b>Claim No: <a href="#">1</a></b>	Creditor Name: Acme Construction Company 444 Fourth Street Charleston, WV 25301	Last Date to File Claims: Last Date to File (Govt): Filing Status: Docket Status: Late: N
Claim Date: 09/08/2003	Amends Claim No: Amended By Claim No:	Duplicates Claim No: Duplicated By Claim No:
<b>Class</b>	<b>Amount Claimed</b>	<b>Amount Allowed</b>
Secured	\$13400.00	
<b>Total</b>	<b>\$13400.00</b>	
Description: Addition of Family Room		
Remarks:		
<b>Claim No: <a href="#">2</a></b>	Creditor Name: GMAC 300 Kanawha Boulevard Charleston, WV 25301	Last Date to File Claims: Last Date to File (Govt): Filing Status: Docket Status:

- ◆ Click on the [1](#) hyperlink (or the claim number hyperlink of the claim you want to view) to view the **pdf** document associated with the claim.
- ◆ Click on the [2:03-bk-20784 Doris Marie Day](#) hyperlink to display the selection screen for a **Docket Report**.
- ◆ Click on the **Menu** option of choice, or the *Browser's* **Back** button to continue.

**Docket Report** - The **Docket Report** can also be generated through the Query Menu or by clicking on the Case Name/Case Number hyperlink throughout docketing events.

**STEP 1** Click on **Docket Report** from the Reports menu. The **Docket Sheet** selection screen will display.



- ◆ For the complete docket sheet, leave **Filed/Entered** and **Documents** fields blank.
- ◆ Check the box to include links to Notice of Electronic Filing.
- ◆ Choose **Sort by** preference.
- ◆ Click on the **Run Report** button.

**STEP 2** The **Docket Sheet** will display.

Filing Date	#	Docket Text
05/28/2003	44444	Chapter 13 Voluntary Petition - all Schedules and Statements: Assets: \$62,000.00, Liabilities: \$94,000.00. Receipt # 44444, Fee Paid \$185. (gfb, ) (Entered: 05/28/2003)

- ◆ Click on the document number hyperlink to view the document.
- ◆ Click on the 'ball' to the left of the document number to view the Notice of Electronic Filing.

**341 Meetings/Hearings** - The **341 Meeting/Hearings** allows the user to choose from three types of reports.

**STEP 1** Click on the **341 Meeting/Hearings** hypertext link from the **Reports Menu**. A selection criteria screen displays and allows the user to choose from three reports, **Meeting of Creditors, Hearings, and Specific Case Schedule**.

The screenshot displays the ECF Bankruptcy Court Calendar interface for the Southern District of West Virginia. The interface is divided into three main sections: Meeting of Creditors (§ 341), Hearings, and Specific Case Schedule. The Meeting of Creditors section is selected, showing options for Date, Trustee, and various display options. The Hearings section shows options for Judge, Date, and Calendar Events. The Specific Case Schedule section shows options for Case Number and display options. A 'View Calendar' button is at the bottom.

- ◆ **Meeting of Creditors** - click the radio button to select this report.
  - ◆ **Date** - Click the drop down box to select a date.
  - ◆ **Trustee** - Click the drop down box to select a specific trustee or All Trustees.
  - ◆ **Options** - Click box to enable option.
- ◆ **Hearings** - click the radio button to select this report.
  - ◆ **Judge** - Automatically defaults too Judge Pearson.
  - ◆ **Date** - Click the drop down box to select a date
  - ◆ **Calendar Events** - Click drop down box to select event(s) (press and hold <Ctrl> key to select multiple events).
- ◆ **Specific Case Schedule** - click the radio button to select this report.
  - ◆ **Case Number** - enter the case number in 'YY-NNNNN' format
  - ◆ **Options** - Click box to enable option.
- ◆ Click **View Calendar** to view selected report.
- ◆ Click **Reset** to clear all selections and return to the default selections.

**Docket Activity Report** - The **Docket Activity Report** generates a report of docket activity on a specific case.

**STEP 1** Click on **Docket Activity** hypertext link from the **Reports Menu**. A selection criteria screen displays and allows the user to specify what information is to be included on the report.

The image shows two screenshots from the ECF Bankruptcy system. The left screenshot shows the 'Reports' menu with links for Cases, Claims Register, Docket Report, 341 Meetings / Hearings, Docket Activity, Mailing Labels by Case, and Order Book. The right screenshot shows the 'Docket Activity Report' selection screen. It includes a warning about PACER charges, a checkbox for 'Only cases to which I am linked', dropdown menus for Case number, Office (Beckley, Bluefield), Case type (ap, bk), and Category (answer, appeal, auditor). It also has date fields for 'Entered between' (11/28/2006 to 11/29/2006), radio buttons for 'Summary Text' and 'Full Docket Text', a 'Sort by' dropdown (Case Number), and 'Run Report' and 'Clear' buttons.

**NOTE:** This report is not subject to the 30-page limit on PACER charges.

- ◆ **Case Number** - enter the case number in 'YY-NNNNN' format.
- ◆ **Office** - click on the office where the case resides or left-click on your mouse, scroll down list while continuing to hold down the left mouse button to select all offices.
- ◆ **Case Type** - click on the case type or left-click on your mouse, scroll down list while continuing to hold down the left mouse button to select all types.
- ◆ **Category** - optional selection.
- ◆ **Calendar Events** - Scroll down list to select the type of hearing.
- ◆ **Entered between** - enter a **start** and **ending** date for the time frame you want the report to reflect (**this field is required**).
- ◆ **Sort by** - click on the drop down box and select Case Number or Date/Time.
- ◆ Click on **Run Report** button.

**STEP 2** The **Docket Activity** report displays.

Docket Activity Report					
U.S. Bankruptcy Court -- Southern District of West Virginia					
Report Period: 1/1/2002 - 7/25/2006					
Case Number/Title Office	Doc Id	Date Entered/Filed	Category/ Event	Judge/ Trustee	Notes
2:03-bk-20007 Tom Wilson Office: 2	1	Entered: 01/14/2003 14:56:54 Filed: 01/14/2003	Category:misc Event: Voluntary Petition (Chapter 7)	Judge: Pearson Trustee: Jones, Jr	Subm. by: admin Chapter: 7 Type: bk Group: crt
			Category:misc Event: Voluntary Petition (Chapter 7)	Judge: Pearson Trustee: Standish	Subm. by: admin Chapter: 7 Type: bk Group: crt
	2	Entered: 01/14/2003 15:07:47 Filed: 01/14/2003	Category:motion Event: Reconsider	Judge: Pearson Trustee: Jones, Jr	Subm. by: admin Chapter: 7 Type: bk Group: crt
			Category:motion Event: Reconsider	Judge: Pearson Trustee: Standish	Subm. by: admin Chapter: 7 Type: bk Group: crt

**Mailing Labels by Case-** Displays name/address data in label format for a specific case. Parties who appear on this report consist of both uploaded creditors from schedules AND parties who have filed a pleading in the case.

**STEP 1**        Go to Section **Utilities Menu**, page 8.