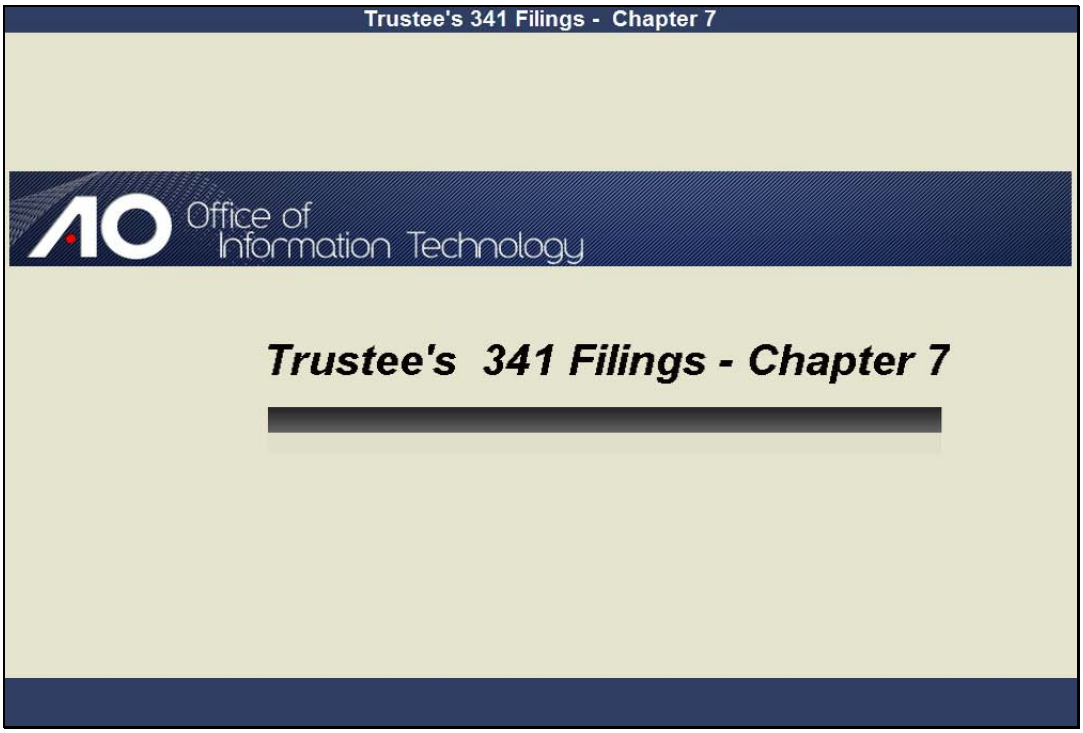
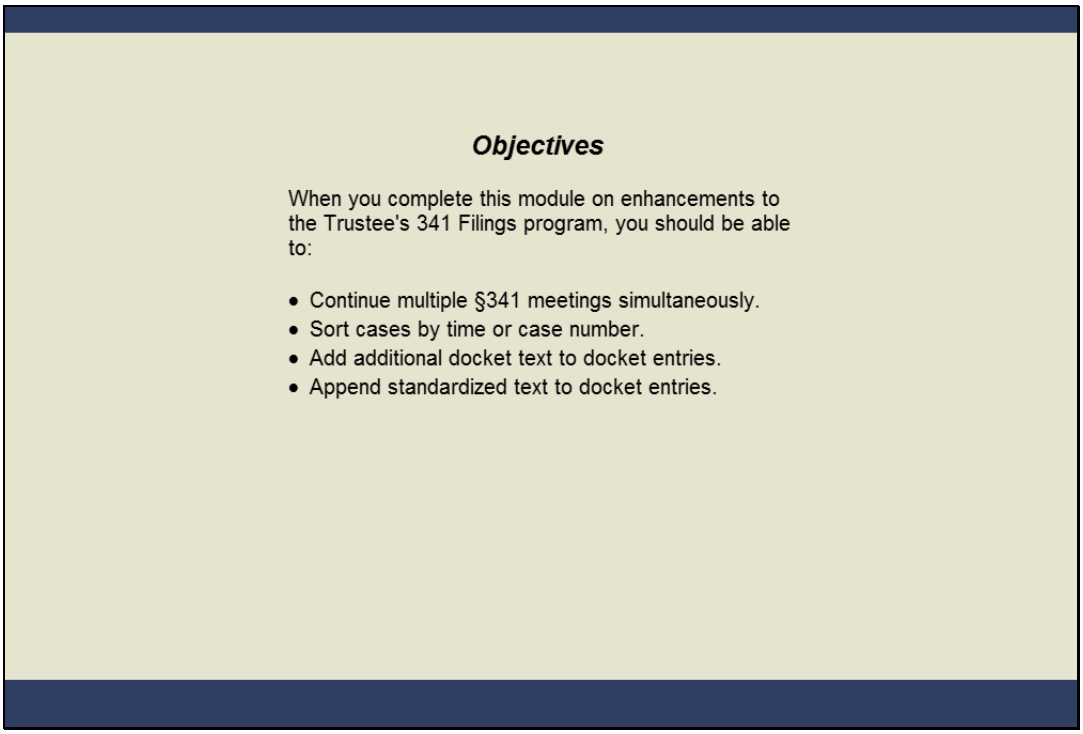


Welcome
Slide notes:



Objectives

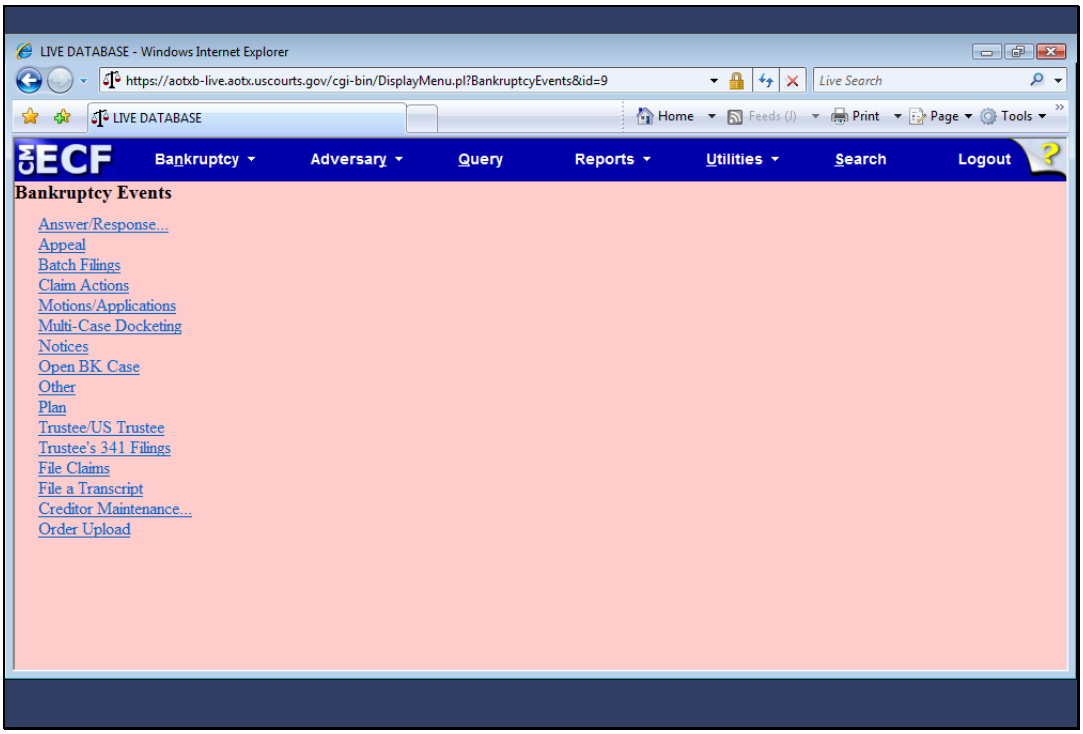
Slide notes: The Trustee's 341 Filings program has new features that will make the process more efficient and gives you the option to customize docket text. When you complete this lesson, you should be able to continue multiple 341 meetings simultaneously, sort cases by time or case number, add additional docket text to docket entries, and append standardized text to docket entries.

Trustee Login

Slide notes: To demonstrate the new enhancements, I have logged into CMECF as the trustee, Julian Mayfair. When I move the mouse over the Bankruptcy main menu selection...

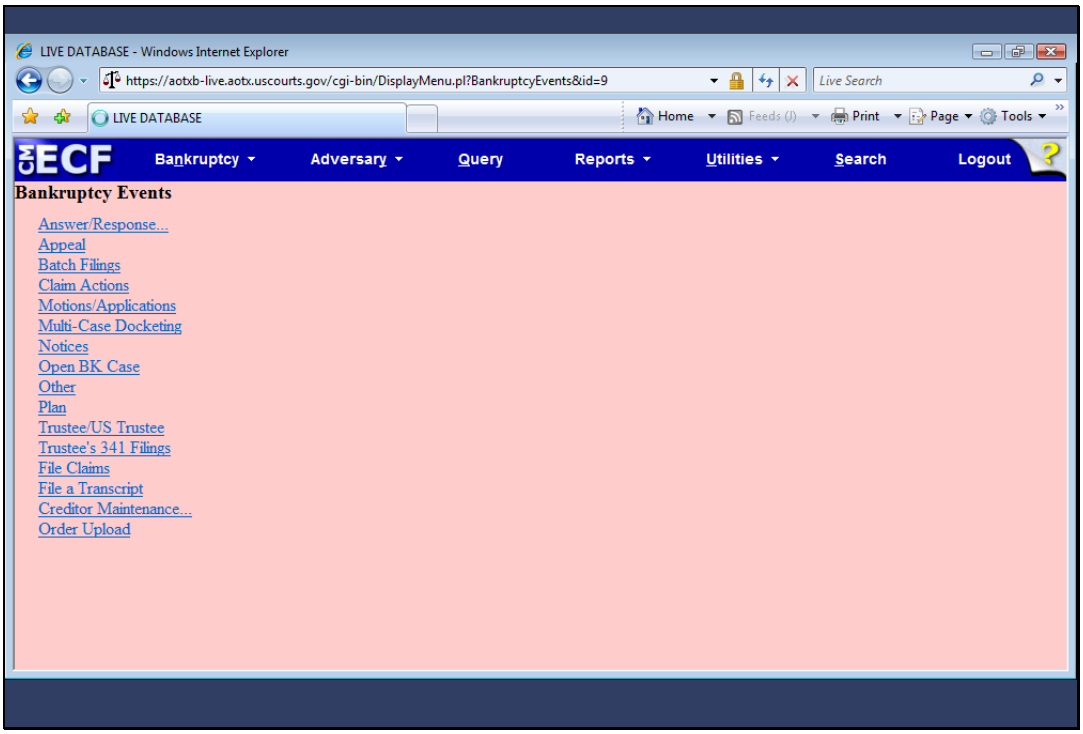
Slide 4

Slide notes: ...a drop-down menu appears, from which I could make a selection. I'll click Bankruptcy.

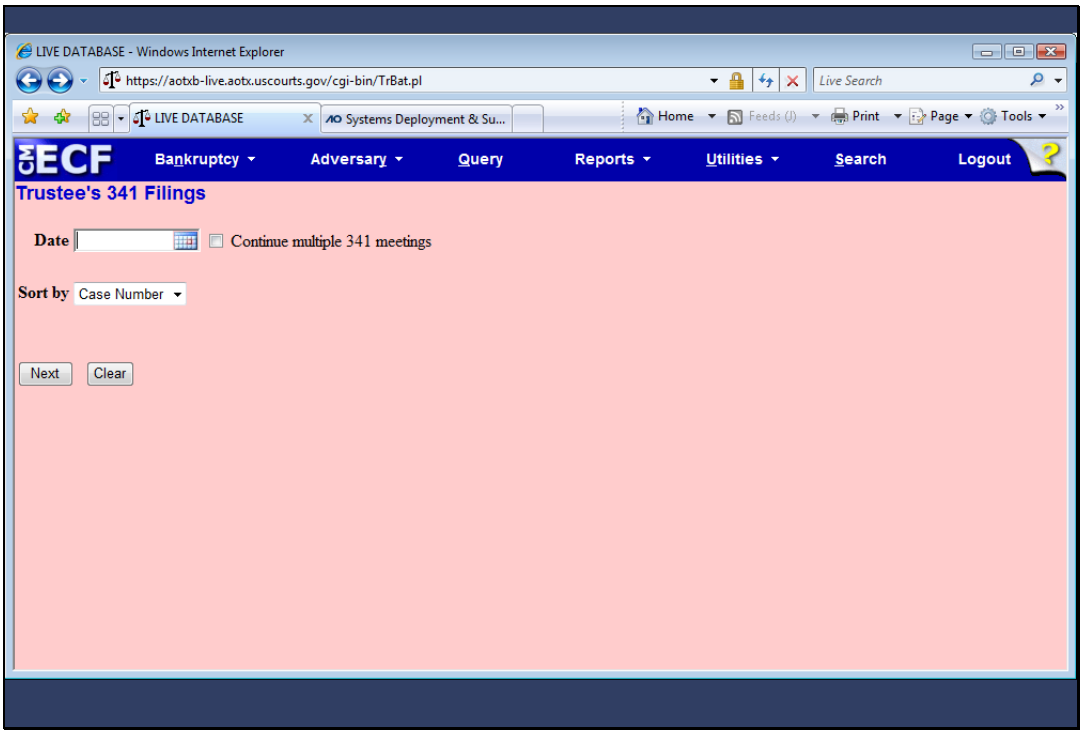


Slide 5

Slide notes: Next, I'll click the Trustee 341 Filings hyperlink.

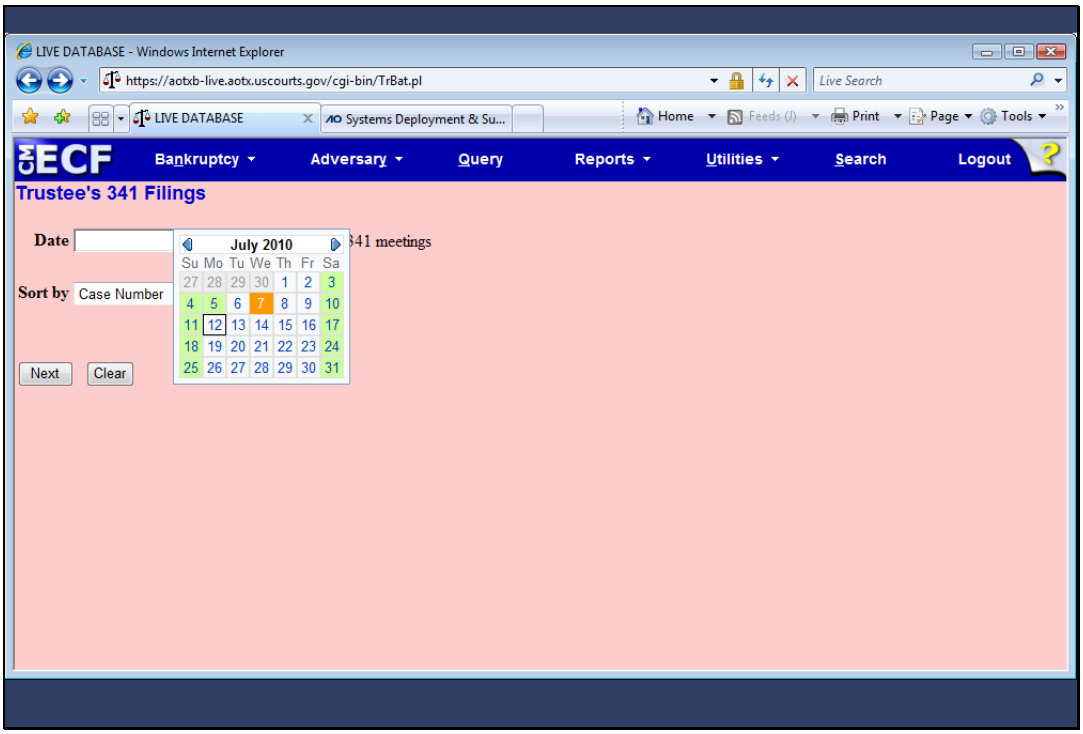


Slide 6
Slide notes:

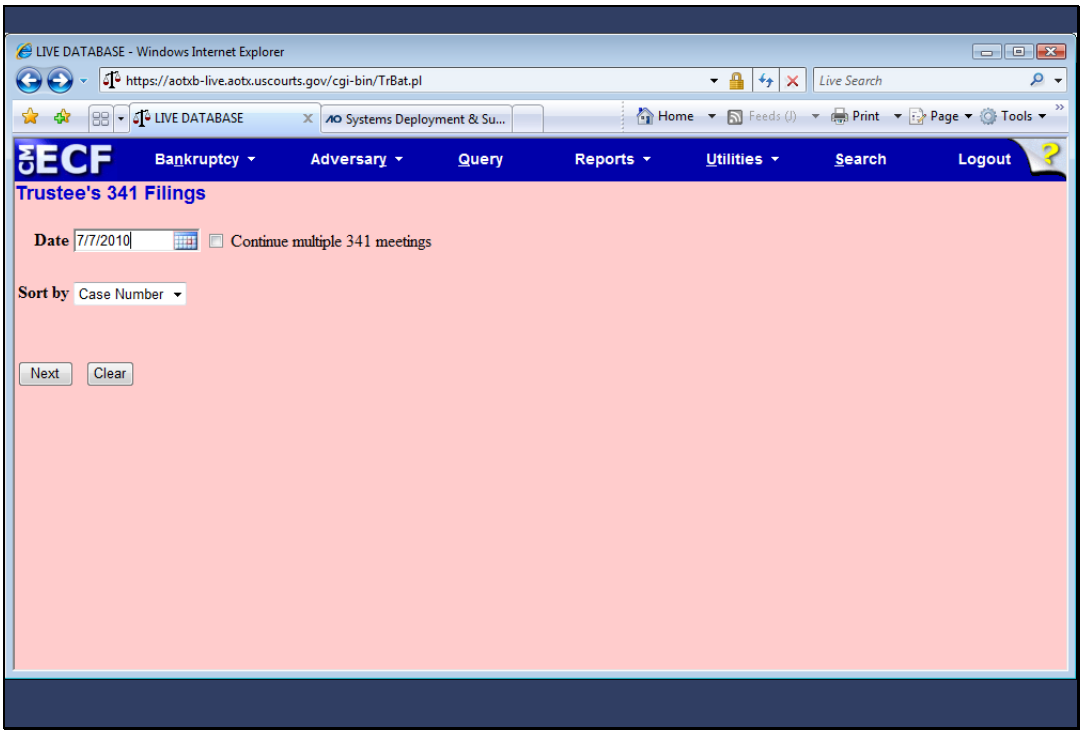


Sort by Date

Slide notes: The initial Trustee's 341 Filings screen has been revised. There is a new option to "Continue multiple 341 meetings" in a single operation and also an option to Sort by time as well as case number. I'll enter the 341 meeting date using the new calendar icon...

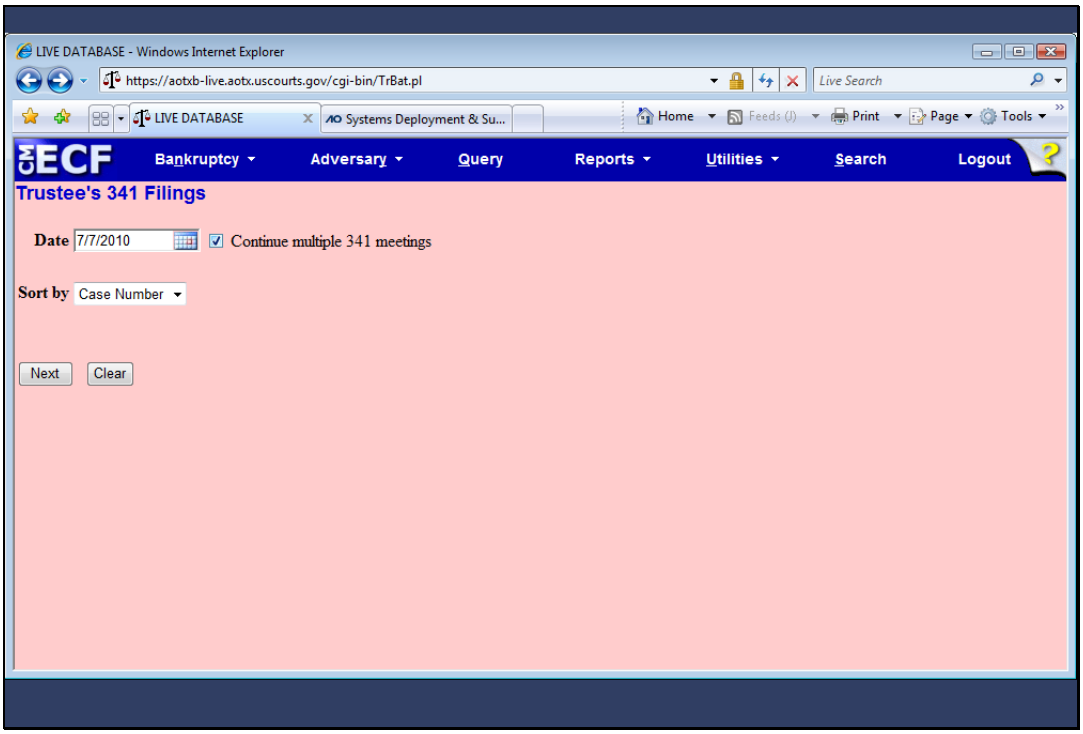


Slide 8
Slide notes:



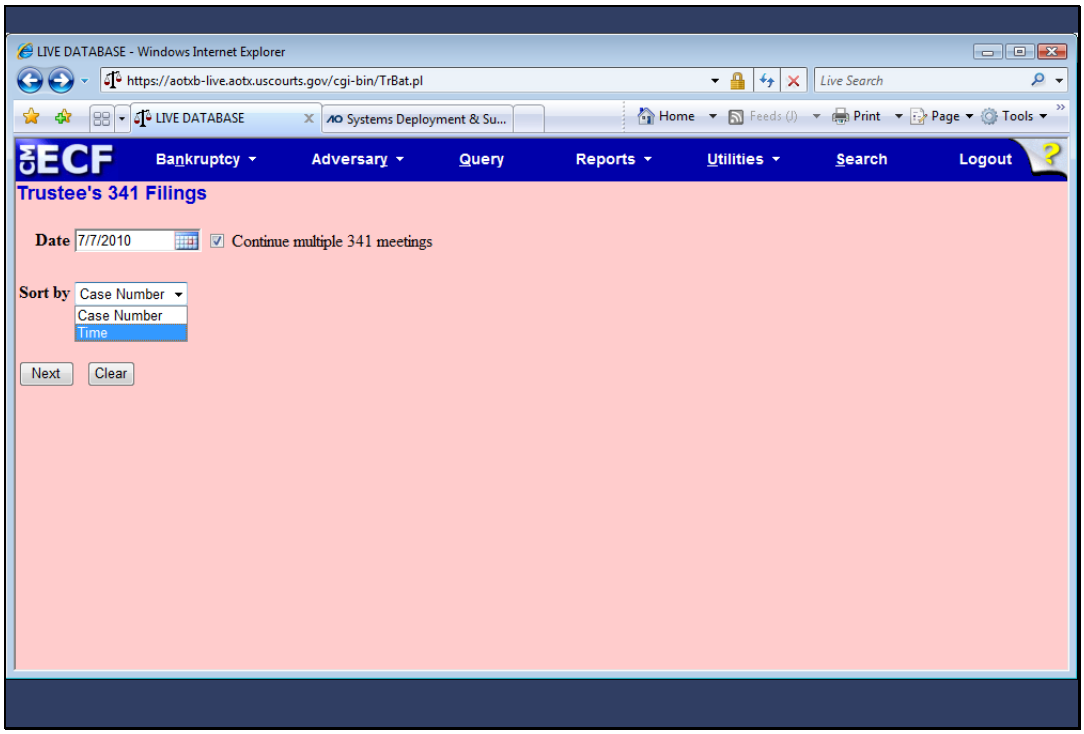
Continue 341 Meetings

Slide notes: ...and then select the “Continue multiple 341 meetings” check box.

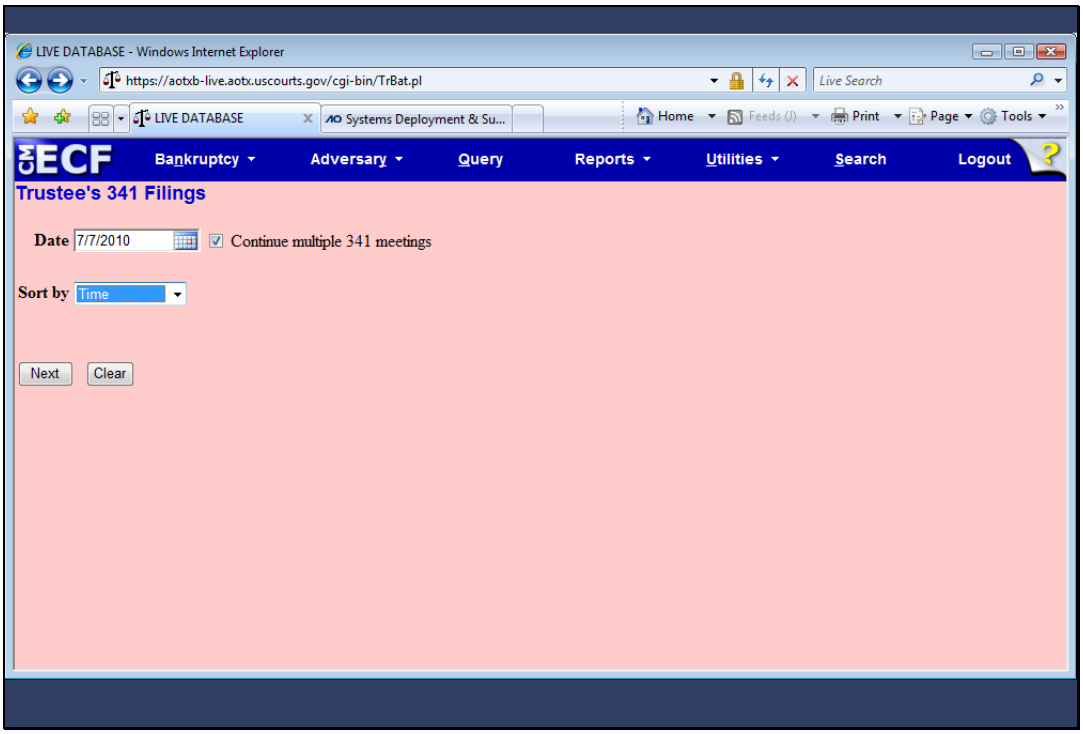


Sort by Time

Slide notes: The calendar can be more useful when sorted by time. I'll click the Sort by drop-down arrow to change the sort from Case Number to Time.

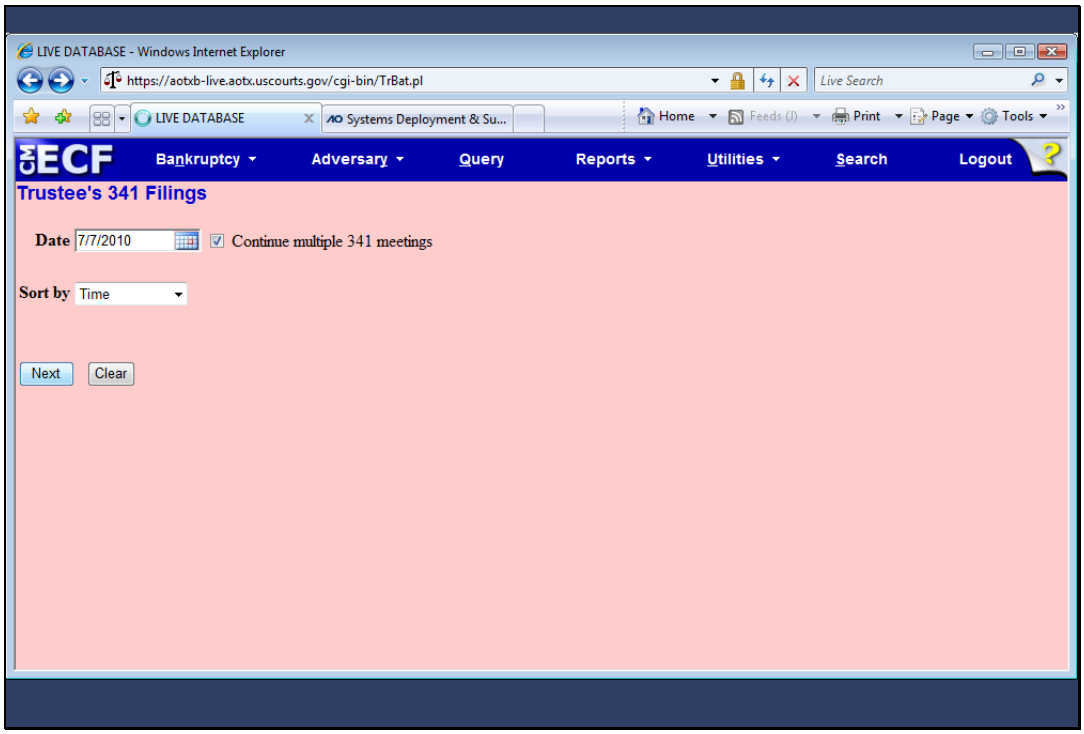


Slide 11
Slide notes:

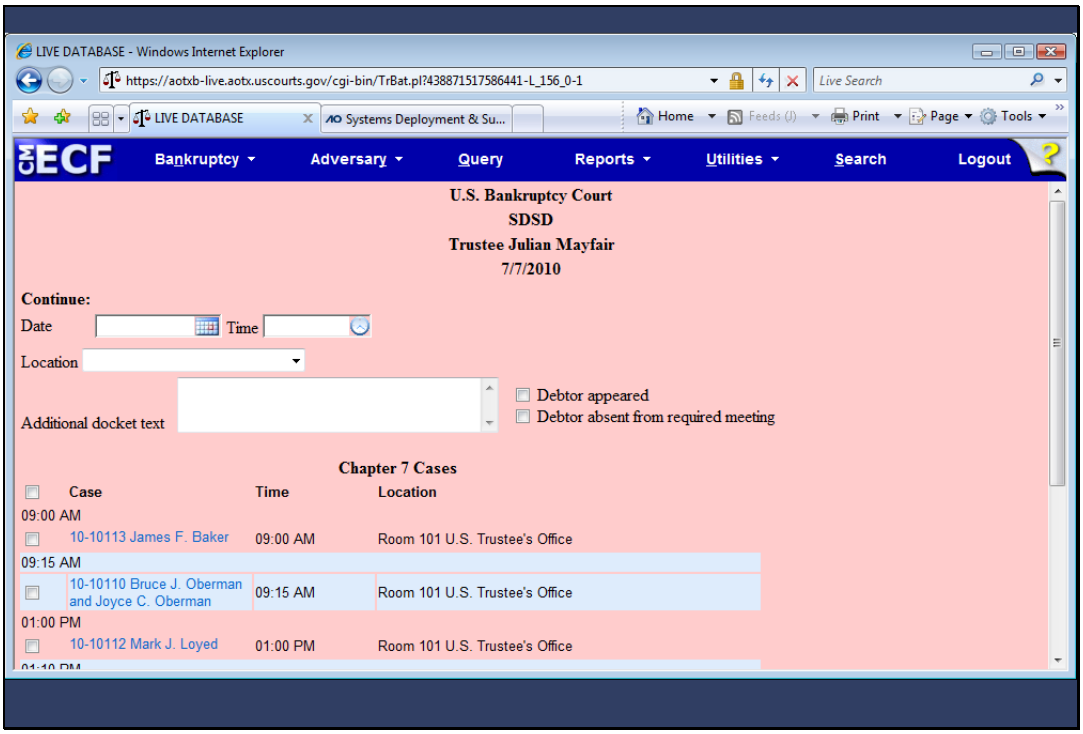


Slide 12

Slide notes: With my selections made, I'll click Next.

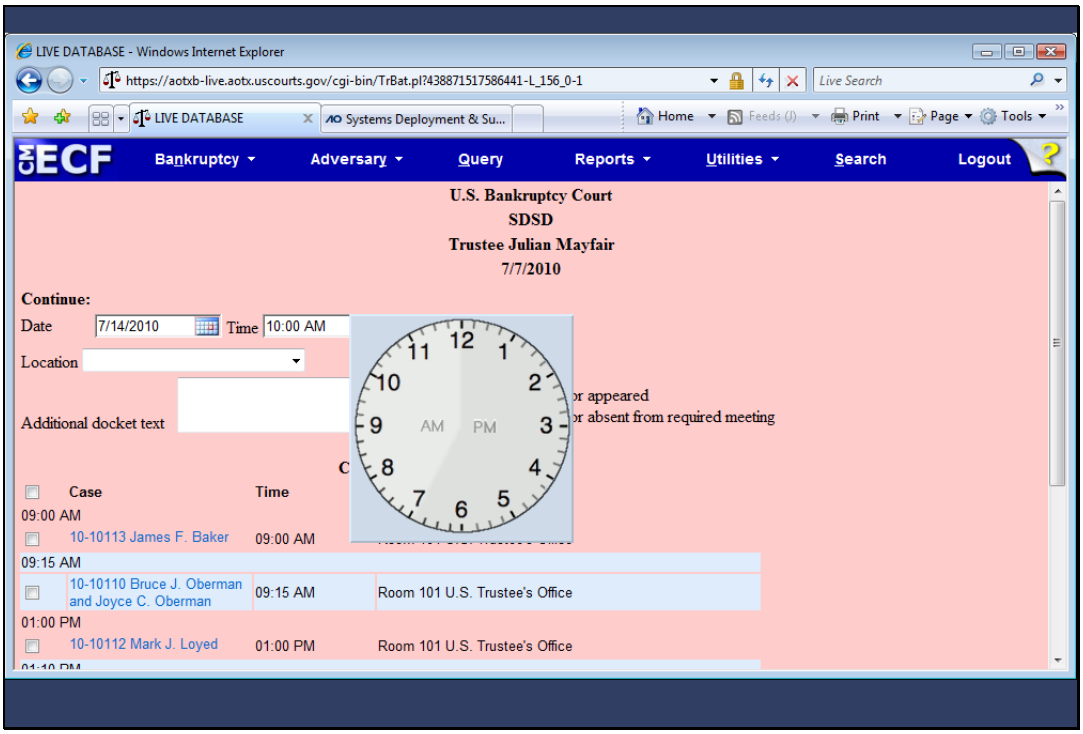


Slide 13
Slide notes:



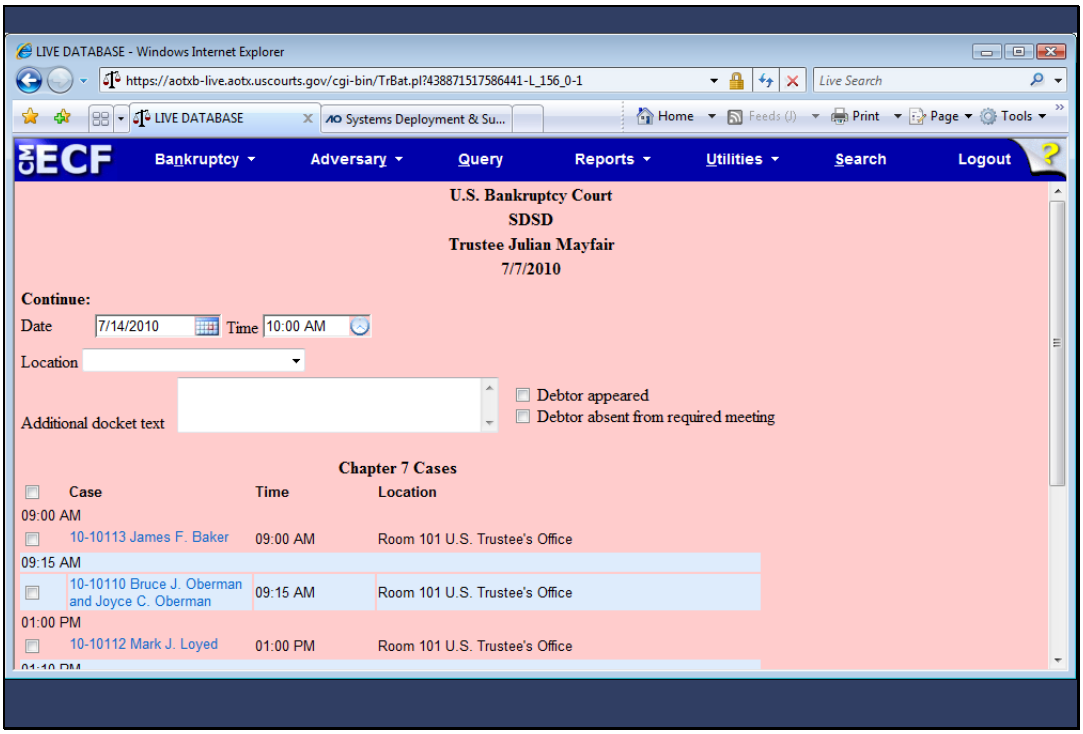
Slide 14

Slide notes: Here is the new 341 meeting calendar screen designed to continue multiple meetings. First, I'll enter the new 341 meeting date and time.



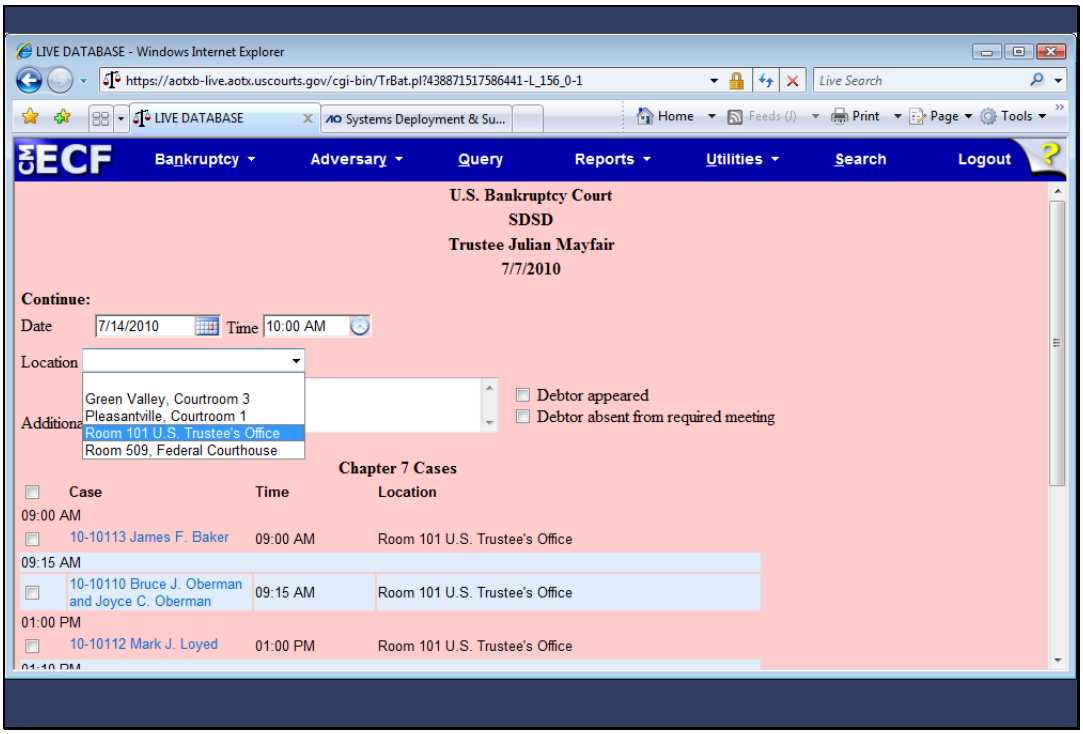
Slide 15

Slide notes: Notice the new clock icon. You can use your mouse to select a time or type in the time as usual. I'll select 10:00 AM.



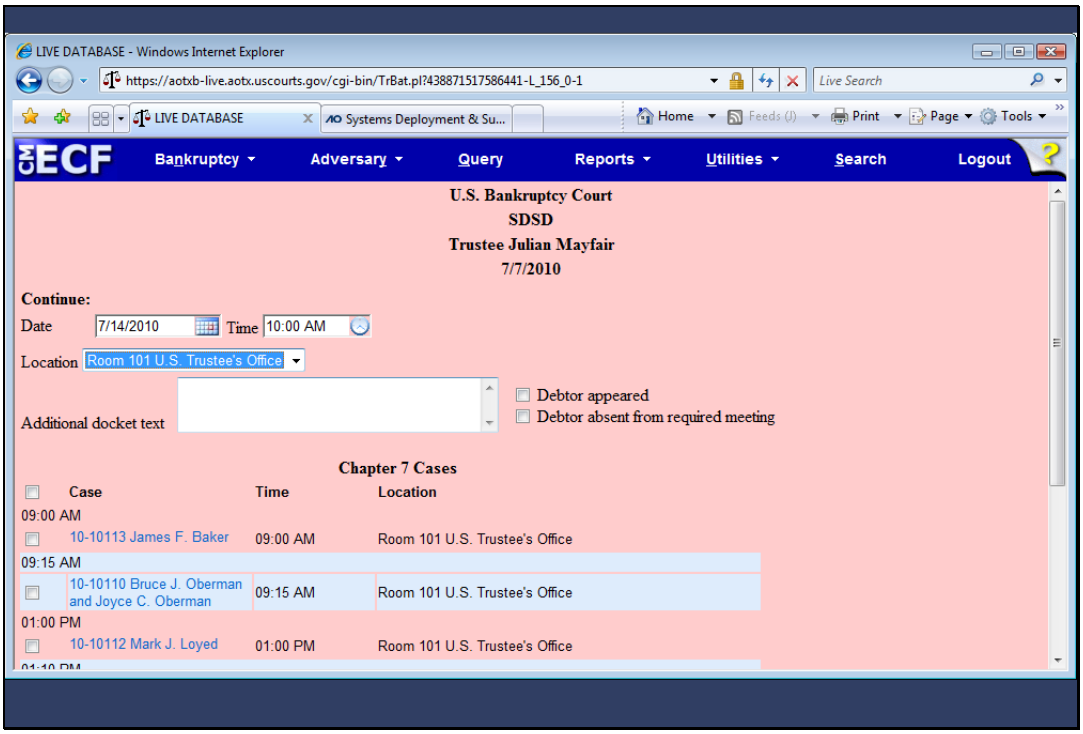
Slide 16

Slide notes: Next, I'll select the location of the meeting by clicking the Location drop-down arrow and...



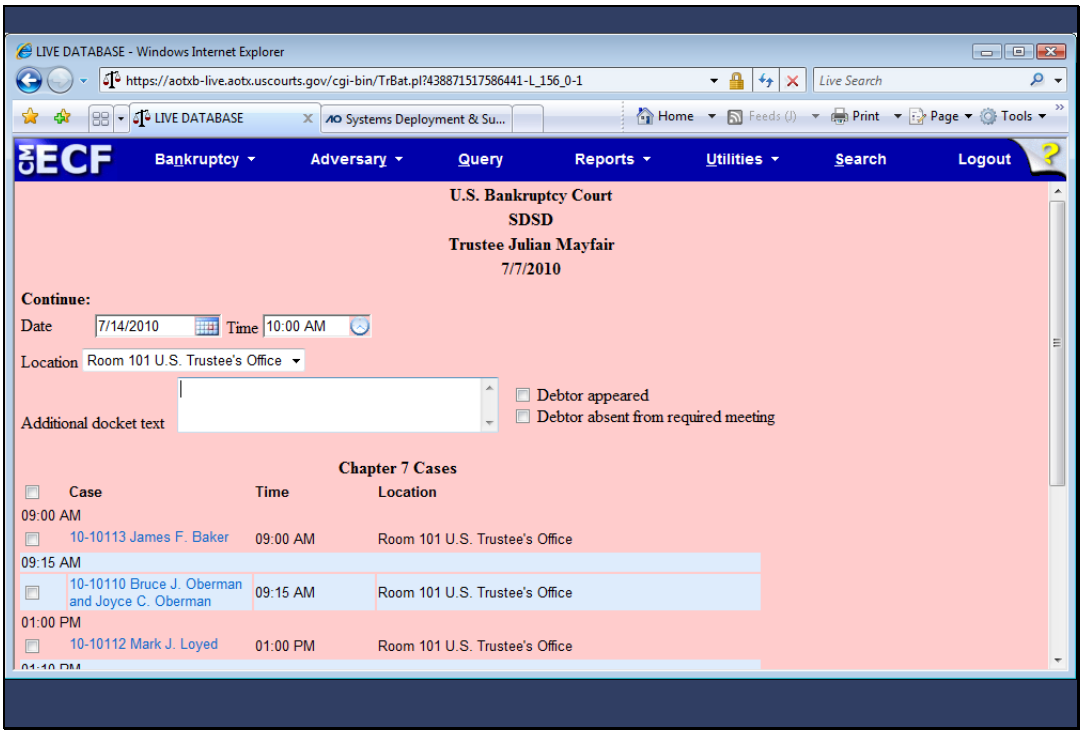
Slide 17

Slide notes: ... selecting “Room 101 U.S. Trustee's Office.”



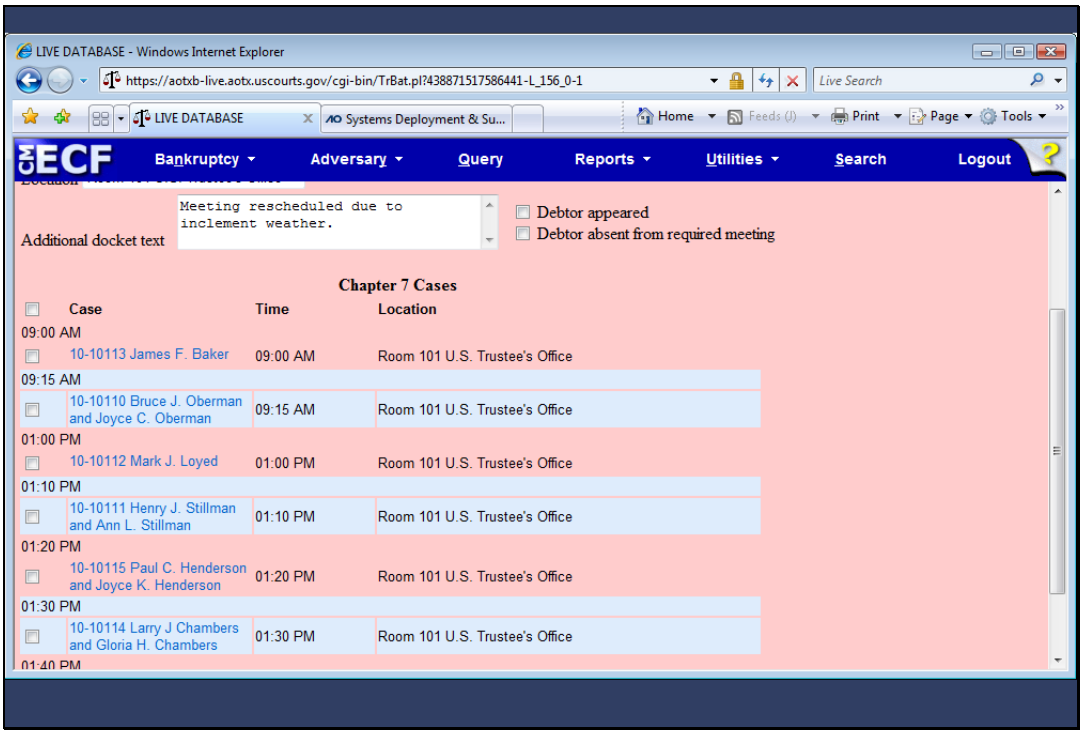
Add Docket Text

Slide notes: An “Additional docket text" window has been added to this screen, allowing the trustee to add comments to the docket report for this entry. Additionally, standardized verbiage can be appended to the final docket text by selecting the “Debtor appeared” or “Debtor absent from required meeting” check boxes. I'll enter some additional docket text ...

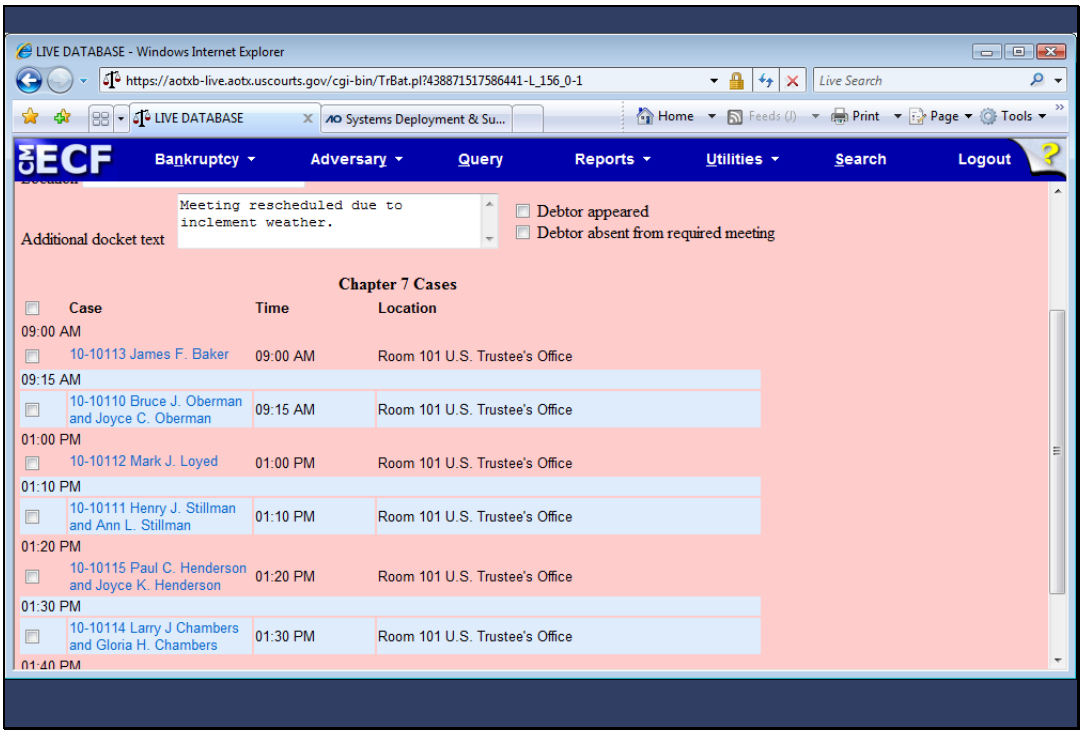


Slide 19

Slide notes: ...and then scroll down on this screen.

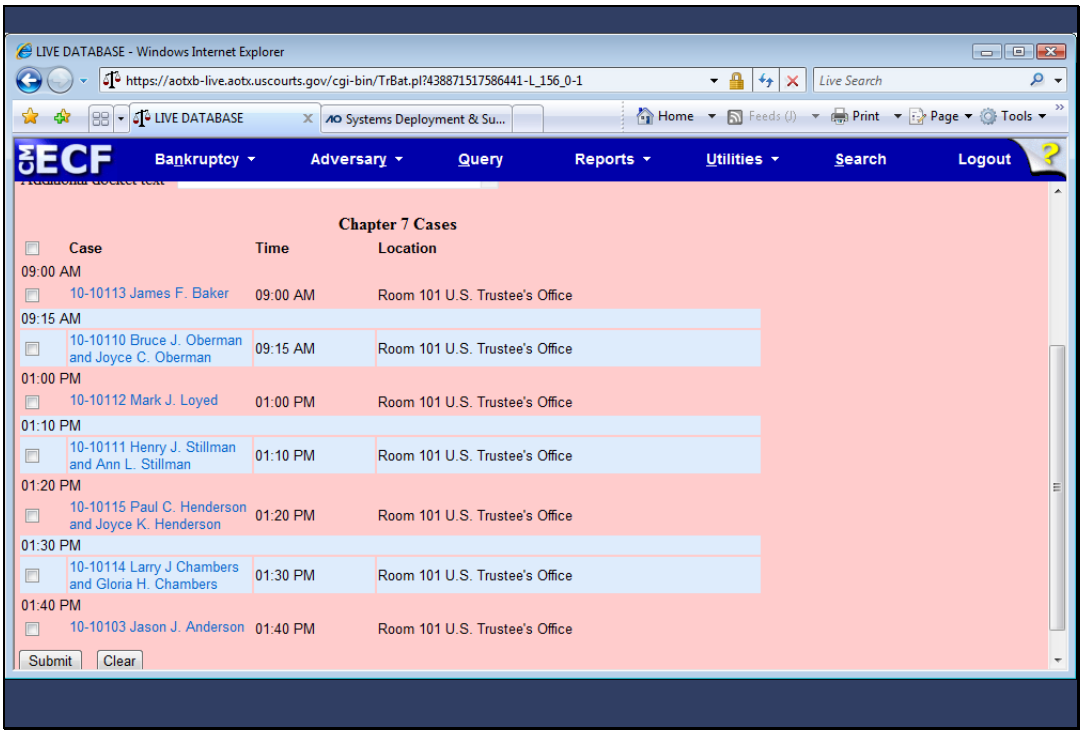


Slide 20
Slide notes:



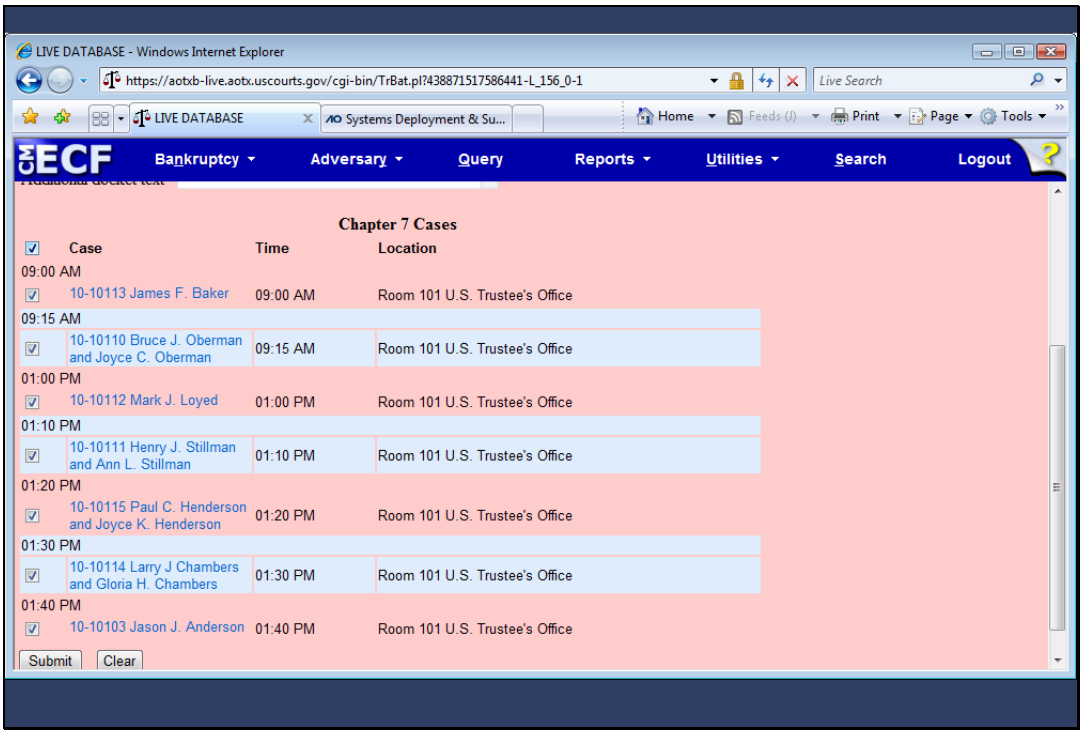
Slide 21

Slide notes:



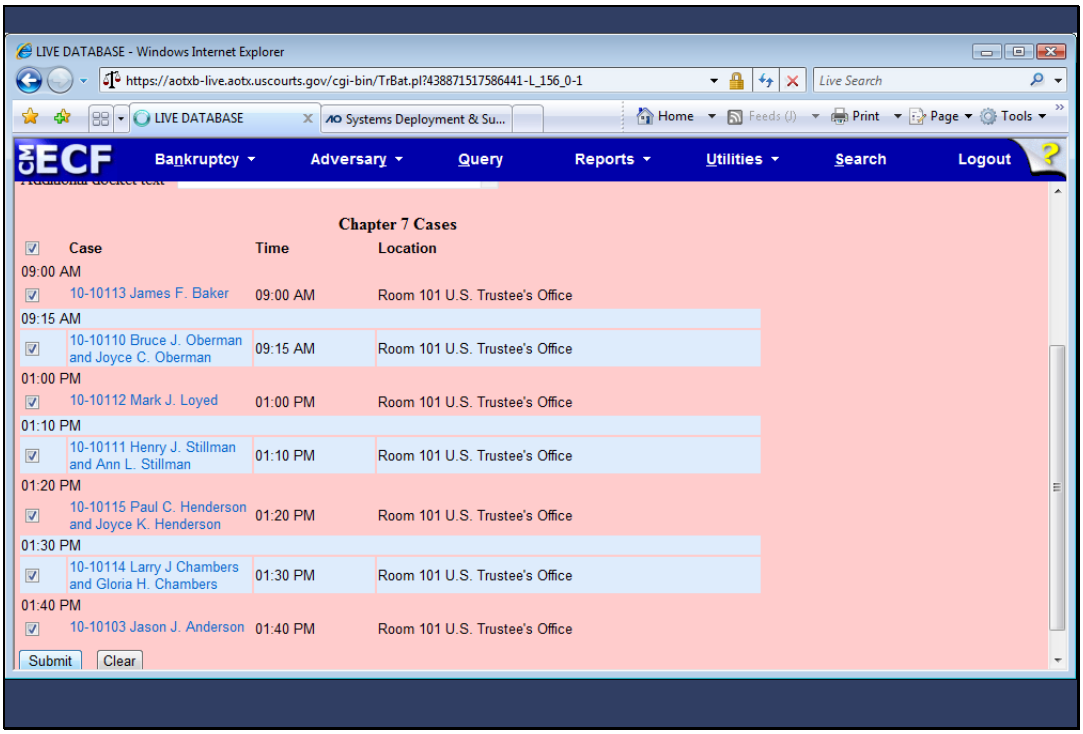
Slide 22

Slide notes: Individual cases could be selected here, but all of the cases will be selected in this example. I'll do that by placing a check mark in the check box at the top of the list of cases...

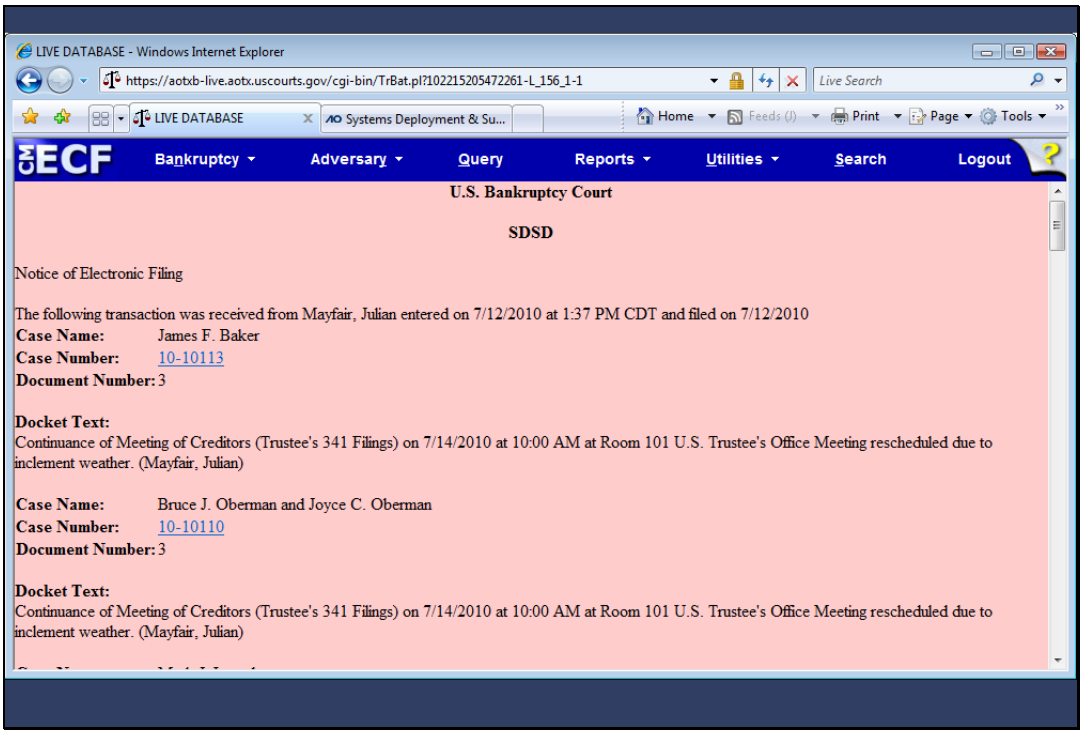


Slide 23

Slide notes: ...and then click Submit.

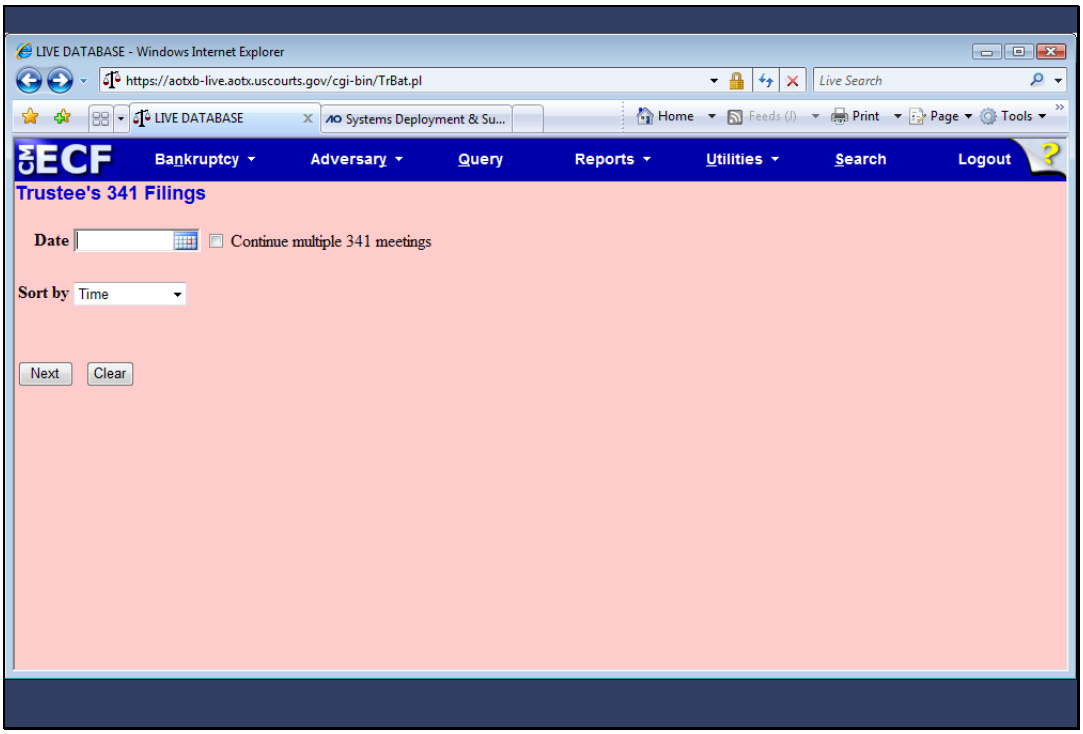


Slide 24
Slide notes:



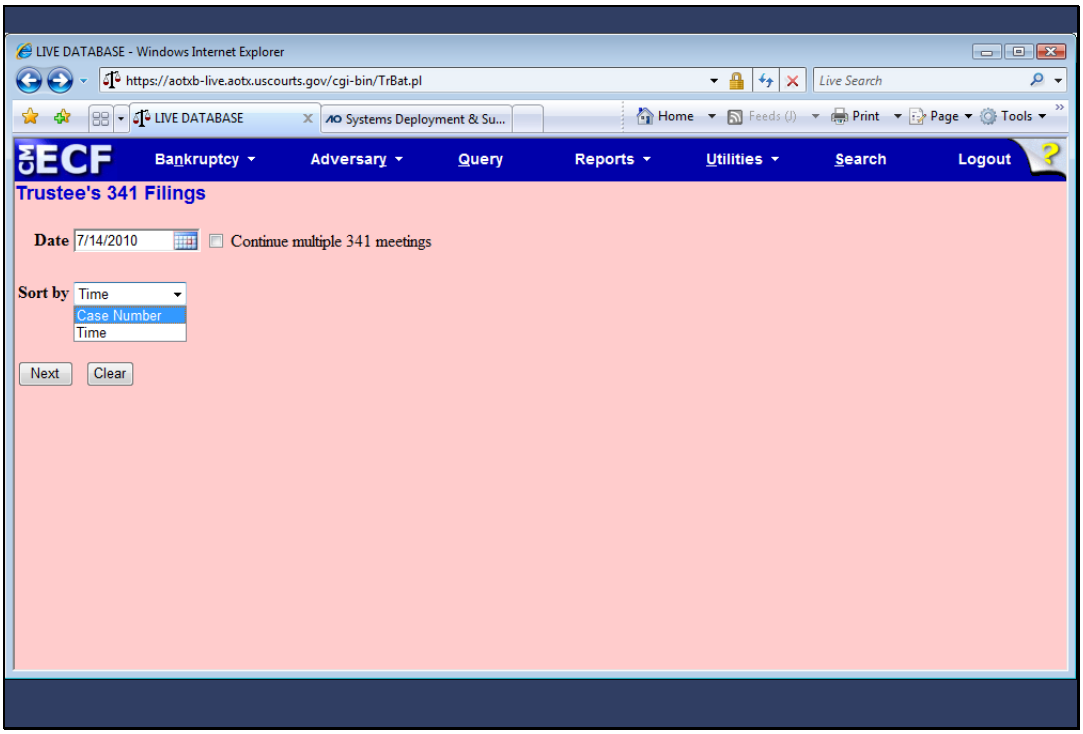
Slide 25

Slide notes: The Notice of Electronic Filing displays the new setting and identical text for all cases processed.



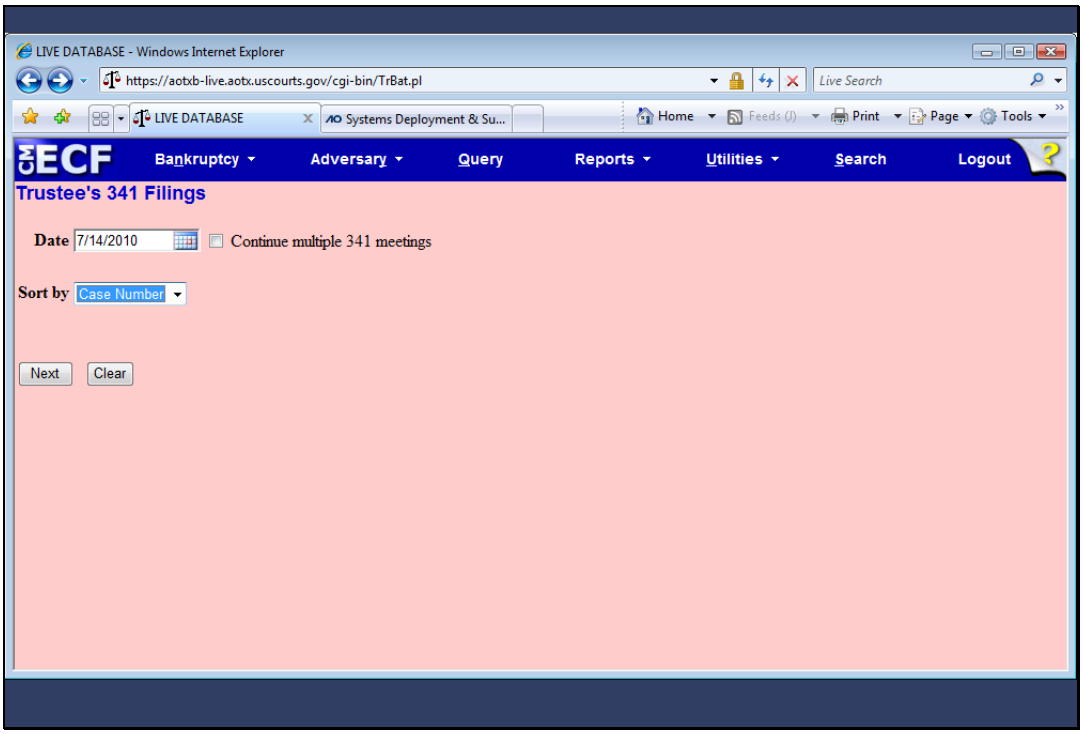
Sort by Case Number

Slide notes: You may also bypass the “Continue multiple 341 meetings” selection and go directly to the next screen to process 341 meetings on each case individually. As you know, the trustee will have access only to his or her own cases and a user must be logged in as the trustee of record for the targeted activity to appear. To demonstrate, I'll enter the date of the 341 meeting, click the Sort by drop down arrow...

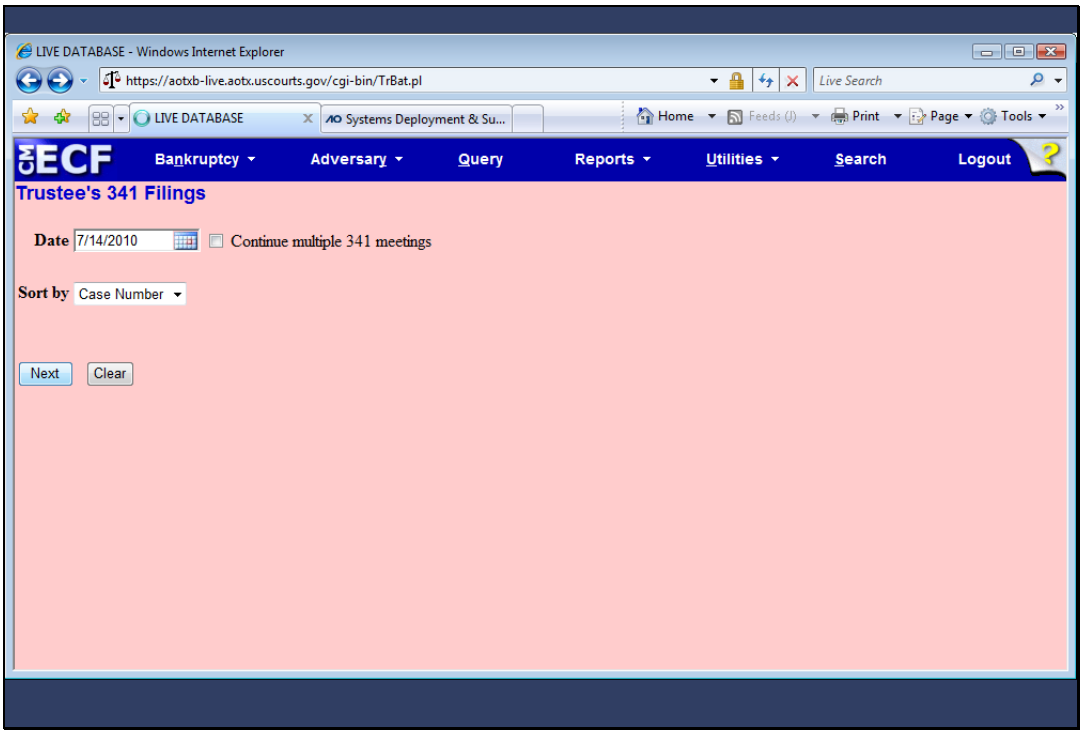


Slide 27

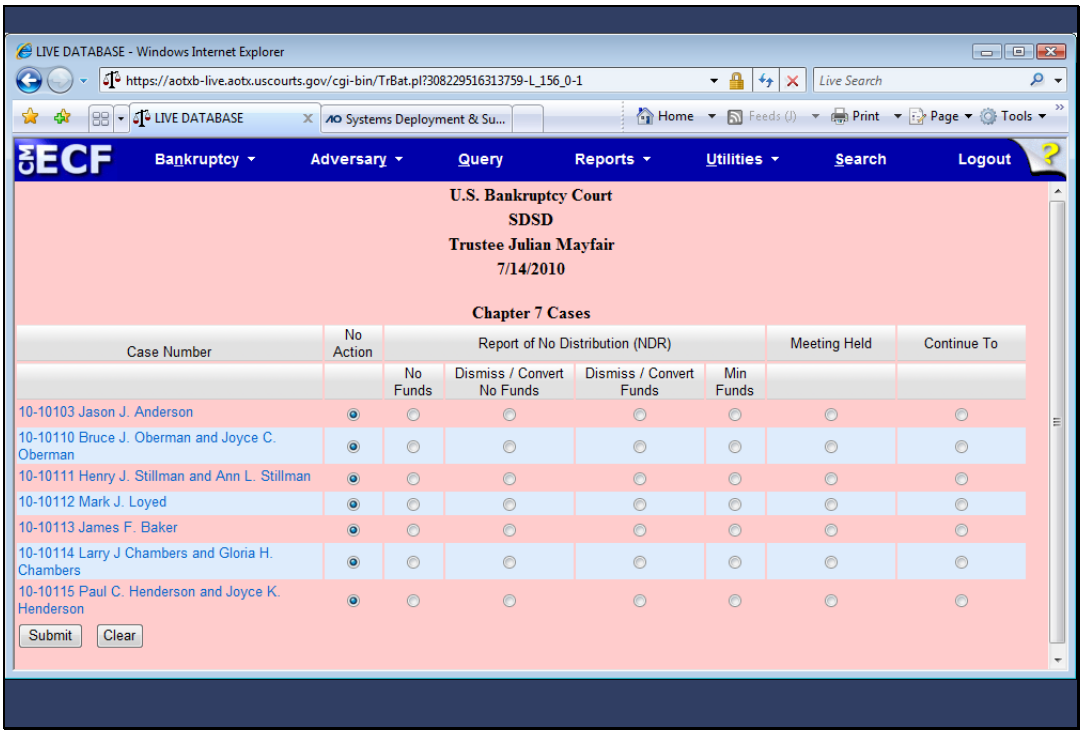
Slide notes: ...and select Case Number...



Slide 28
Slide notes: ...and click Next.

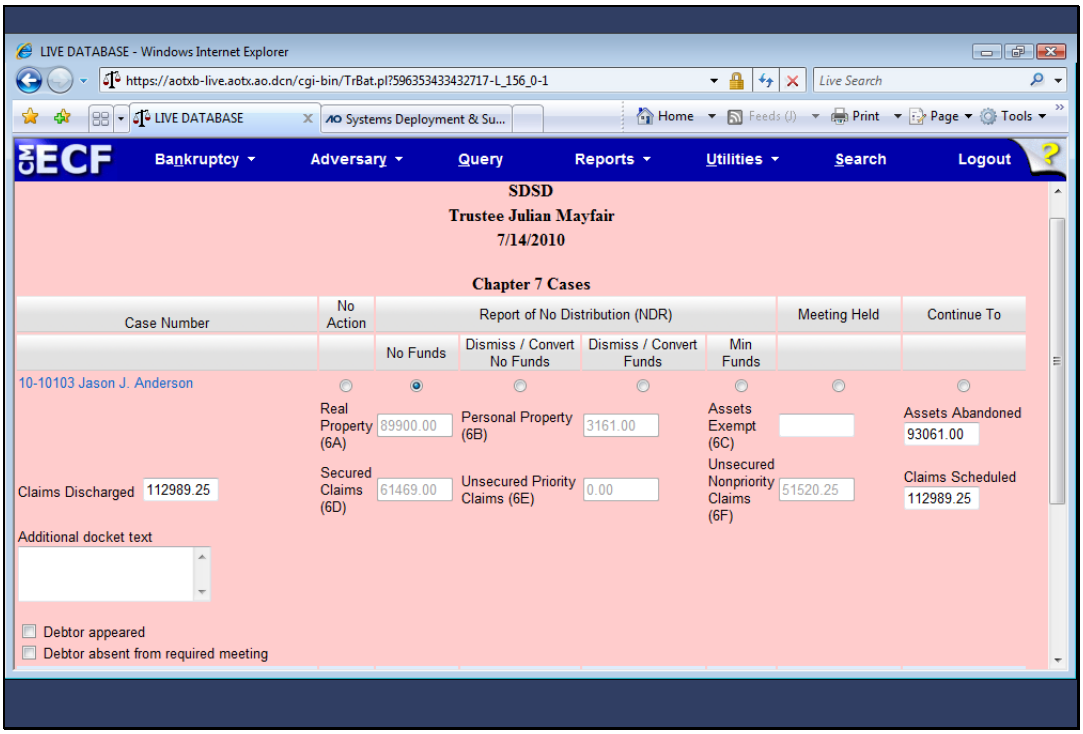


Slide 29
Slide notes:



Slide 30

Slide notes: With this revised screen, the Meeting Held column may function differently in each court. For instance, you may be used to seeing Initial Report in this column. Your local court will give you guidance on this feature, if it has changed. Otherwise, this screen is essentially the one you're used to seeing. The additional docket text features are available within each selection on this screen. I'll show you the No Funds screen as an example.



Slide 31

Slide notes: For all options other than No Action, the new text window and check boxes for “Debtor appeared” and “Debtor absent from required meeting” appear. Entries may be made here for each individual case. Other than these enhancements, the functionality of this program has not changed.

Summary

Slide notes: You should now be able to use the new features to make the Trustee 341 Filing process more efficient. Continuing meetings in batch is a great time saver. Sorting cases by time makes the calendar easier to use and styling docket text to show pertinent information for each case makes this utility more valuable for your court.