

CHAPTER 13 TRUSTEE'S FINAL REPORT AND ACCOUNT (BATCH) AND AMENDED REPORT

Updated 2/20/2024

Description: This process shows the steps and screens required for a trustee to complete a Trustee 13 Report Event for multiple (batch) cases on CM/ECF.

STEP 1 – Click on the **Bankruptcy** hyperlink on the CM/ECF Main Menu Bar.

STEP 2 – The BANKRUPTCY EVENTS screen displays.

- Click on **Batch Filings** hyperlink.
- For further information on each of these categories, click the **Help** button located on the CM/ECF menu bar.

STEP 3 – The CASE NUMBER screen displays.

- Enter the case number for the appropriate case(s).
- Click the **[Next]** button.

STEP 4 – The EVENTS screen displays.

- Verify ALL case numbers and case names. If the case number and name do not match or are invalid, click the browser **[BACK]** button to re-enter the correct case number.
- Use the down arrow to the right of the box to scroll through the Event Type list for the document being filed. The Chapter 13 Trustees Final Report and Account events include completed, converted, dismissed, and hardship discharge. Select the applicable event.
- Click the **[Next]** button.

STEP 5 – The VERIFICATION screen with debtor name and case number appears.

- Verify this is the correct case or cases.
- Click the **[Next]** button.

STEP 6 – The SELECT PDF screen displays.

- Select the .pdf file to associate with this event.
- Click the [Next] button.

NOTE: If multiple cases, you must enter a .pdf for each case. Enter all .pdf's before moving to next screen. Failure to do so will result in a document number not being assigned.



The screenshot shows a warning message in red text: **WARNING! YOU MUST ENTER A PDF FOR EACH CASE!**. Below the warning, there is a text input field containing "02-00200-jw William Boyle" and a "Browse..." button. At the bottom left, there are two buttons: "Next" and "Clear".

STEP 7 – The VERIFICATION screen with debtor name and case number appears.

- Verify this is the correct case or cases.
- Click the [Next] button.

STEP 8 - The FINAL DOCKET TEXT screen displays.

- This is the last opportunity to verify the accuracy of the information. Submission of this screen is final.
- If the final docket text is incorrect, click the browser [Back] button to find the screen needed to modify.

NOTE: If the [Back] button is used and case information is altered, you must use the [Next] button and resubmit for each screen or the changes will not take effect. In other words, do not use the [Forward] button on the browser if you alter information on a previous screen.

- To abort or restart the transaction, click the Bankruptcy hypertext link on the Menu Bar.
- Click the [Next] button if correct.

SAMPLE DOCKET TEXT: Final Text

**Chapter 13 Trustee Final Report and Account – Case Dismissed.
(Trustee, Bill).**

Attention!! Submitting this screen commits this transaction. You will have no further opportunity to modify this submission if you continue.

Have you redacted?

STEP 9 – The NOTICE OF ELECTRONIC FILING screen displays.

- The Notice of Electronic Filing is the verification that the filing has been sent electronically to the court’s database. It certifies that the document filed is now an official court document. It is recommended that you print this screen for your records because it also includes the date, time, case number, and document number.



AMENDED CHAPTER 13 TRUSTEE FINAL REPORT

Description: This process shows the steps and screens required for a trustee to file an Amended Trustee 13 Report Event for one case in CM/ECF.

STEP 1 – Click on the **Bankruptcy** hyperlink on the CM/ECF Main Menu Bar.

STEP 2 – The BANKRUPTCY EVENTS screen displays.

- Click on **Trustee/US Trustee** hyperlink.

STEP 3 – The CASE NUMBER screen displays.

- Enter the case number for the appropriate case(s).
- Click the **[Next]** button.

STEP 4 – The EVENTS screen displays.

- Verify case number and case name. If the case number and name do not match or are invalid, click the browser **[BACK]** button to re-enter the correct case number.
- Type “Amended Chapter 13 Trustee Final Report and Account” and click on the event to add it to “Selected events”.
- Click the **[Next]** button.

STEP 5 – The PARTY screen appears.

- Select the appropriate trustee name,
- Click the **[Next]** button.

STEP 6 – The SELECT PDF screen displays.

- Select the .pdf file to associate with this event.
- Click the **[Next]** button.

STEP 7 – The REFER TO EXISTING screen displays.

- Select the check box to refer to an existing event.
- Click the **[Next]** button.

STEP 8 – The CATEGORY screen displays.

- Select the trustee category to display previously filed reports.
- Click the **[Next]** button.

STEP 9– The SELECT EVENT screen displays.

- Select the final report event that current filing amends.
- Click the **[Next]** button.

STEP 10 – The REPORT TYPE screen displays.

- Select the type of report being filed.
- Click the **[Next]** button.

STEP 11 - The FINAL DOCKET TEXT screen displays.

- This is the last opportunity to verify the accuracy of the information. Submission of this screen is final.
- If the final docket text is incorrect, click the browser **[Back]** button to find the screen needed to modify.

NOTE: If the **[Back]** button is used and case information is altered, you must use the **[Next]** button and resubmit for each screen or the changes will not take effect. In other words, do not use the **[Forward]** button on the browser if you alter information on a previous screen.

- To abort or restart the transaction, click the Bankruptcy hypertext link on the Menu Bar.
- Click the **[Next]** button if correct.

SAMPLE DOCKET TEXT: Final Text

Amended Chapter 13 Trustee Final Report and Account – Case Dismissed. (Trustee, Bill).

Attention!! Submitting this screen commits this transaction. You will have no further opportunity to modify this submission if you continue.