

Appointment of Consumer Privacy / Health Care Ombudsman

For Trustees

STEP 1 Click the [Bankruptcy](#) hyperlink on the CM/ECF main menu (See figure 1).



Figure 1

STEP 2 The **Bankruptcy Events** screen displays (See figure 2).

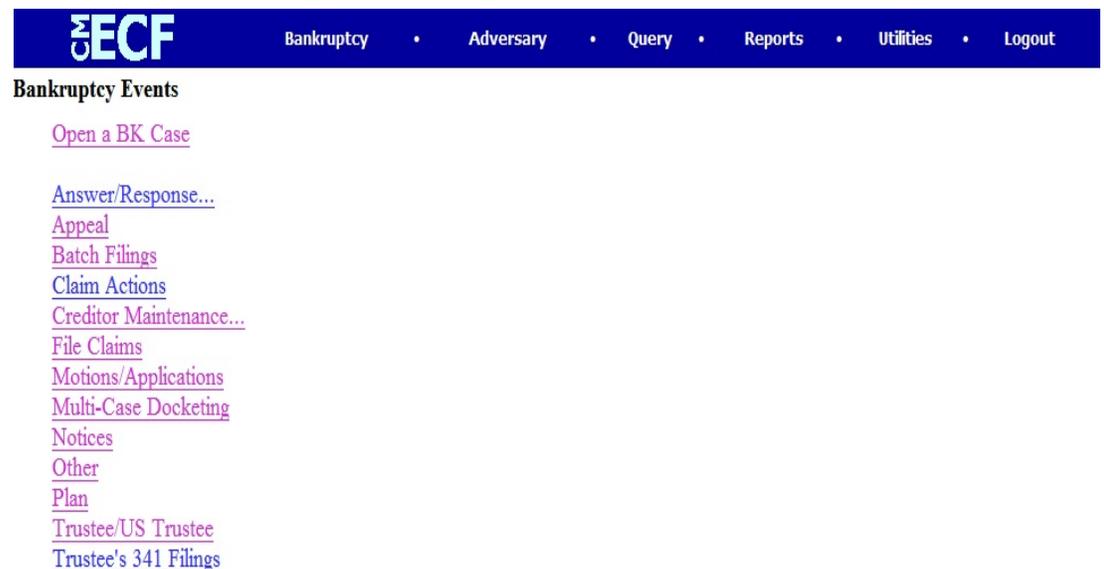


Figure 2

◆ Click the [Trustee/US Trustee](#) hyperlink.

STEP 3 The **Case Number** screen displays (See figure 3).



Figure 3

- ◆ Enter the correct case number, including the hyphen and click **NEXT** to continue.

STEP 4 The **Document Selection** screen is displayed (See figure 4).

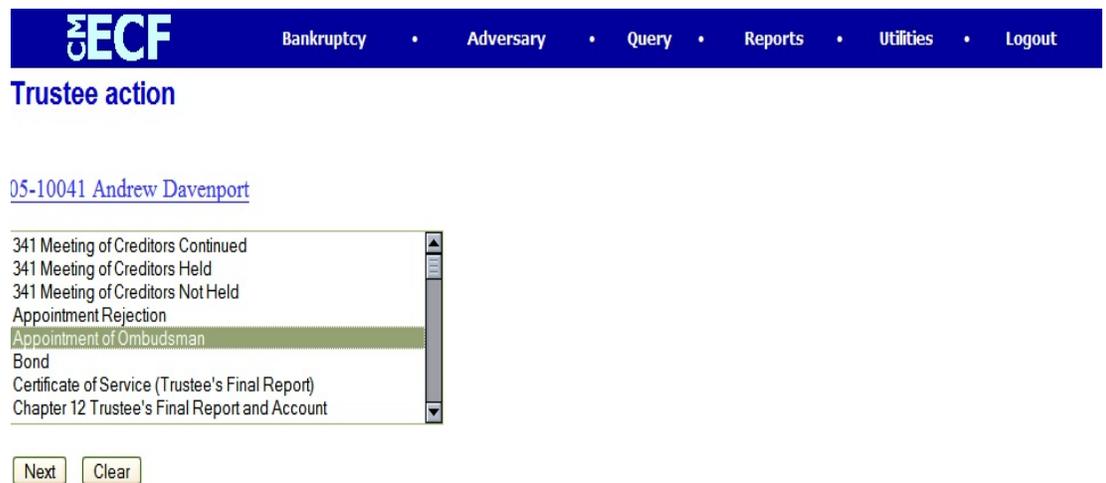


Figure 4

- ◆ Scroll the **Document Selection** screen and select the event **Appointment of Ombudsman**. Click **NEXT** to continue.

- STEP 5** The **Party Selection** screen will be presented listing all participants currently on the case (See figure 5).

Figure 5

- ◆ Select the appropriate filer in the **Party Selection** window and click **NEXT** to continue.

- STEP 6** The **Select a PDF Document** screen appears (See figure 6).

Figure 6

NOTE: This screen is used for associating the imaged document with this entry.

- ◆ Click **Browse**, then click on the down arrow (▼) for the **Files of type** field.
- ◆ In the drop-down box, click on **All Files (*.*)**.

- ◆ Navigate to the directory where the appropriate PDF file is located.
- ◆ Highlight the file. Then right click with your mouse and select **Open** to verify the contents of the document. If this is the correct file, double-click the PDF file to select it.
- ◆ Accept the default setting of **No** for the **Attachments to Document** radio buttons. Attachments will be covered in another module.
- ◆ Click **Next** to continue.

STEP 7 The **Search for a Party** screen displays (See figure 7).

ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout

Trustee action:
[05-10041-reg Andrew Davenport](#)

Search for a party

SSN Tax Id

Last/Business name

Figure 7

- ◆ This screen is for you to enter the appointee on the case. Before you add them as a new party, you should search the database to see if that party already exists to eliminate duplicate records in the system. You can search by Social Security Number, Tax Identification Number, Last Name or Business Name.
- ◆ In this lesson, we will enter the appointee's last name and click **Search**.

Search Hints:

- Enter only one field of data for each search.
- Format Social Security Number or Tax ID with hyphens.
- Searching is case sensitive (Smith not smith).
- Include punctuation (O'Brien).
- Try alternate search clues if your first search is not successful.
- Partial names can be entered.
- Wild Cards (*) are not required at the end of search strings.
- Wild Cards may be used before or within search strings (*son, Gr*y).

STEP 8 If there are no matches, the system will return a **No Person Found** message (See figure 8).

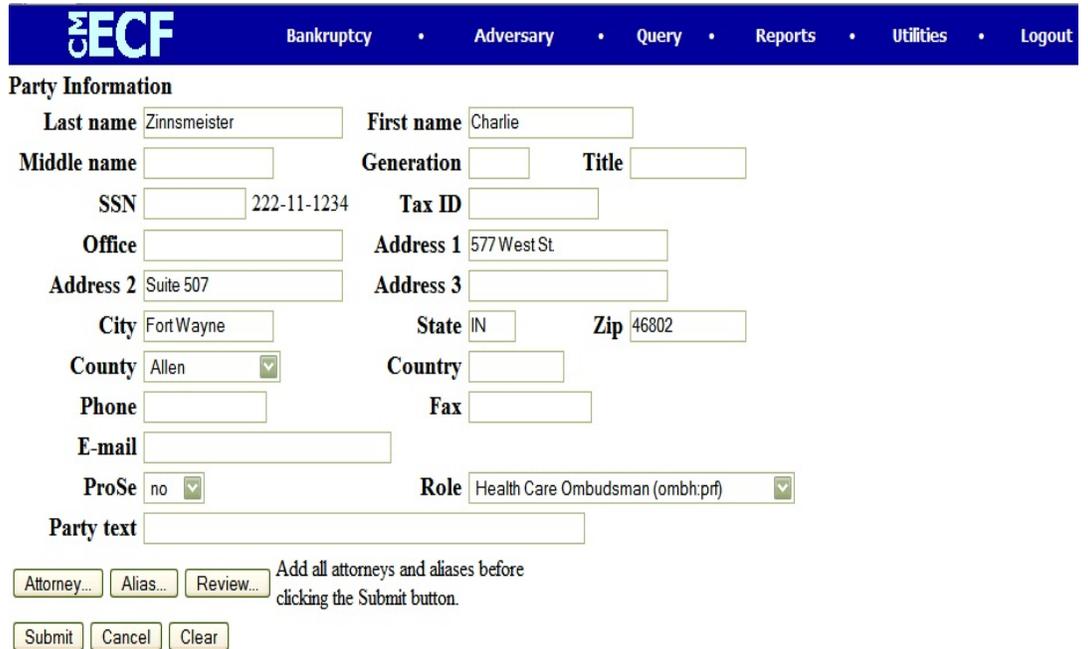


The screenshot shows the ECF Trustee search interface. At the top is a blue navigation bar with the ECF logo and links for Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. Below the navigation bar, the text 'Search for a party' is followed by input fields for 'SSN' and 'Tax Id', and a 'Last/Business name' field. There are 'Search' and 'Clear' buttons. Below this, the text 'Party search results' is followed by the message 'No person found.' and a 'Create new party' button.

Figure 8

- ◆ Once you have tried alternative searches and determined that the party is not in the database, you can now add them. Click **Create New Party**.

STEP 9 The **PARTY INFORMATION** screen displays (See figure 9).



ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout

Party Information

Last name First name

Middle name Generation Title

SSN Tax ID

Office Address 1

Address 2 Address 3

City State Zip

County Country

Phone Fax

E-mail

ProSe Role

Party text

Add all attorneys and aliases before clicking the Submit button.

Figure 9

- ◆ Enter the appointee’s **Name** and **Address** information in the appropriate boxes.
- ◆ Expand the **Role Type** selection pick list box by clicking on the down arrow (▼) with your mouse, and select either **Health Care Ombudsman** or **Consumer Privacy Ombudsman**.

STEP 10 The **Search for a Party** screen displays again (See figure 10).

Figure 10

- ◆ Click **End party selection** to continue.

STEP 11 A text box screen displays (See figure 11).

Figure 11

- ◆ Enter the appropriate information in both boxes and click **NEXT** to continue.

STEP 12 The **With or Without?** screen displays (See figure 12).



ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout

Trustee action:
[05-10041-reg Andrew Davenport](#)

With or Without Certificate of Service?

Next Clear

Figure 12

- ◆ Enter the correct response and click **NEXT** to continue.

STEP 13 A **Verification** screen displays (See figure 13).



ECF Bankruptcy • Adversary • Query • Reports • Utilities • Logout

Trustee action:
[05-10041-reg Andrew Davenport](#)

Next Clear

Figure 13

- ◆ Verify the case number and name and click **NEXT** to continue.

STEP 14 The **Final Text** screen displays (See figure 14).

Trustee action:
[05-10032-reg Rhonda Stanley](#)

Docket Text: Final Text
Appointment of Health Care Ombudsman, Charlie Zinnsmeister Filed by U.S. Trustee Nancy J. Gargula with Certificate of Service. (Triebold, Ellen)

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

Figure 14

- ◆ Proof this screen carefully! This is what will appear on the docket sheet.
- ◆ If the docket text is incorrect, click the browser **Back** button at the top of the screen one or more times to find the screen to be modified, make the correction, and continue through the event by clicking **Next**.
- ◆ To abort or restart the transaction, click on the [Bankruptcy](#) hyperlink on the CM/ECF Main Menu Bar. Although this can be done at any time, this is your last opportunity to make changes.

NOTE: **This is the last opportunity to make any changes before the case is officially opened.**

STEP 15 The **NOTICE OF ELECTRONIC FILING** screen displays (See figure 15).

The screenshot shows the CM/ECF Trustee portal interface. At the top, there is a navigation bar with the CM/ECF logo and links for Bankruptcy, Adversary, Query, Reports, Utilities, and Logout. Below the navigation bar, the text reads "Trustee action: 05-10032-reg Rhonda Stanley". The main content area is titled "U.S. Bankruptcy Court Northern District of Indiana (Test Database)". It displays a "Notice of Electronic Filing" for a transaction received from Triebold, Ellen on 10/11/2005. The case name is Rhonda Stanley, the case number is 05-10032-reg, and the document number is 12. The docket text states: "Appointment of Health Care Ombudsman, Charlie Zinnsmeister Filed by U.S. Trustee Nancy J. Gargula with Certificate of Service. (Triebold, Ellen)". Below this, it lists associated documents, including a main document with the original filename W:\CMECF\PDFS\volp.pdf. An electronic document stamp is provided with a unique ID and date. The notice is to be electronically mailed to R. David Boyer at rms@hbbwlaw.com. It also lists contact information for Steven J. Glaser and Ellen Triebold.

Figure 16

- ◆ This **Notice of Electronic Filing** is the verification that the filing has been sent electronically to the court's database. It certifies that the petition is now an official court document.
- ◆ Clicking on the document number hyperlink [1](#), will display the PDF image just filed.

NOTE: You must enter your PACER login and password to view any documents or reports or perform any queries.