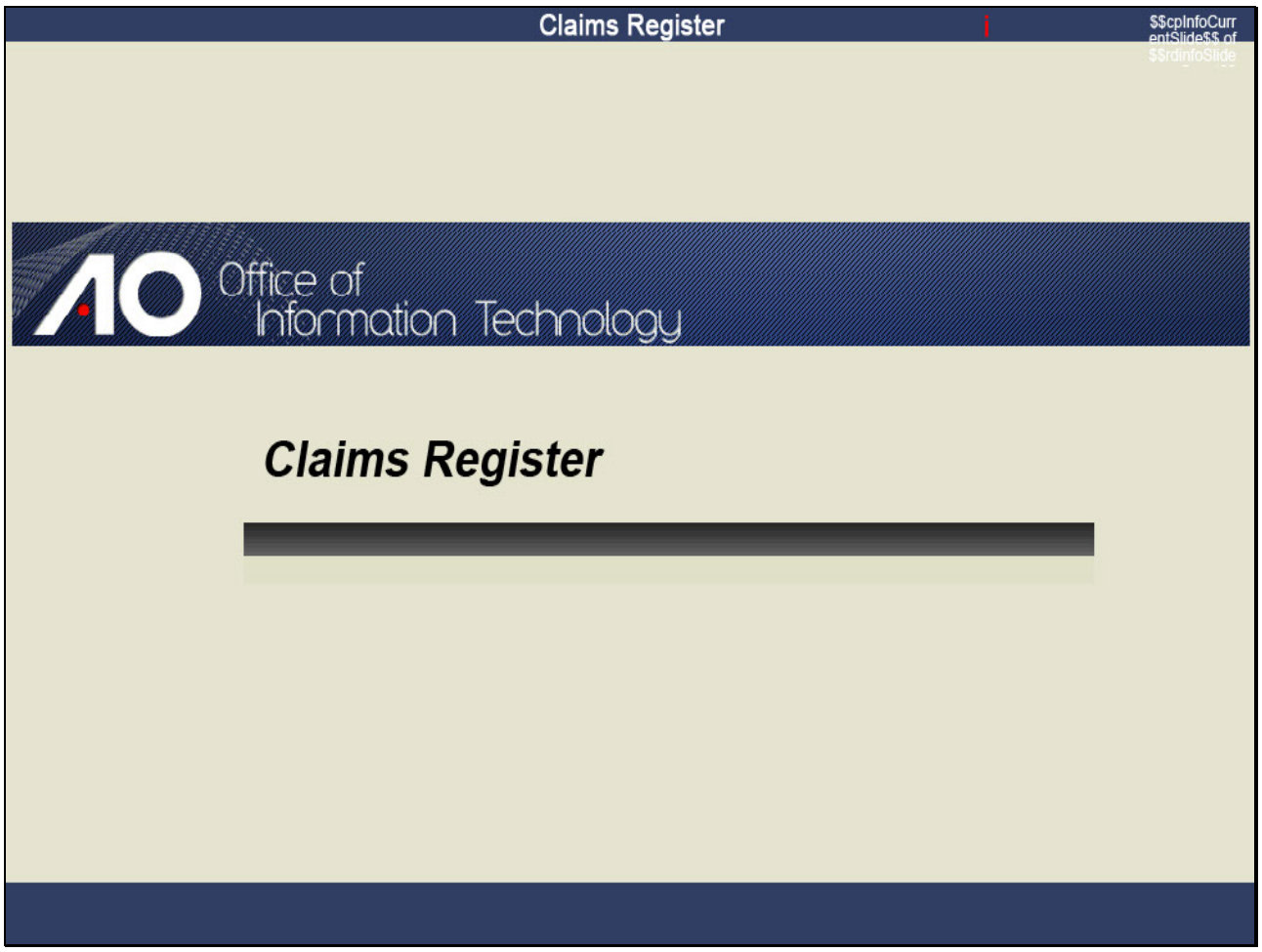
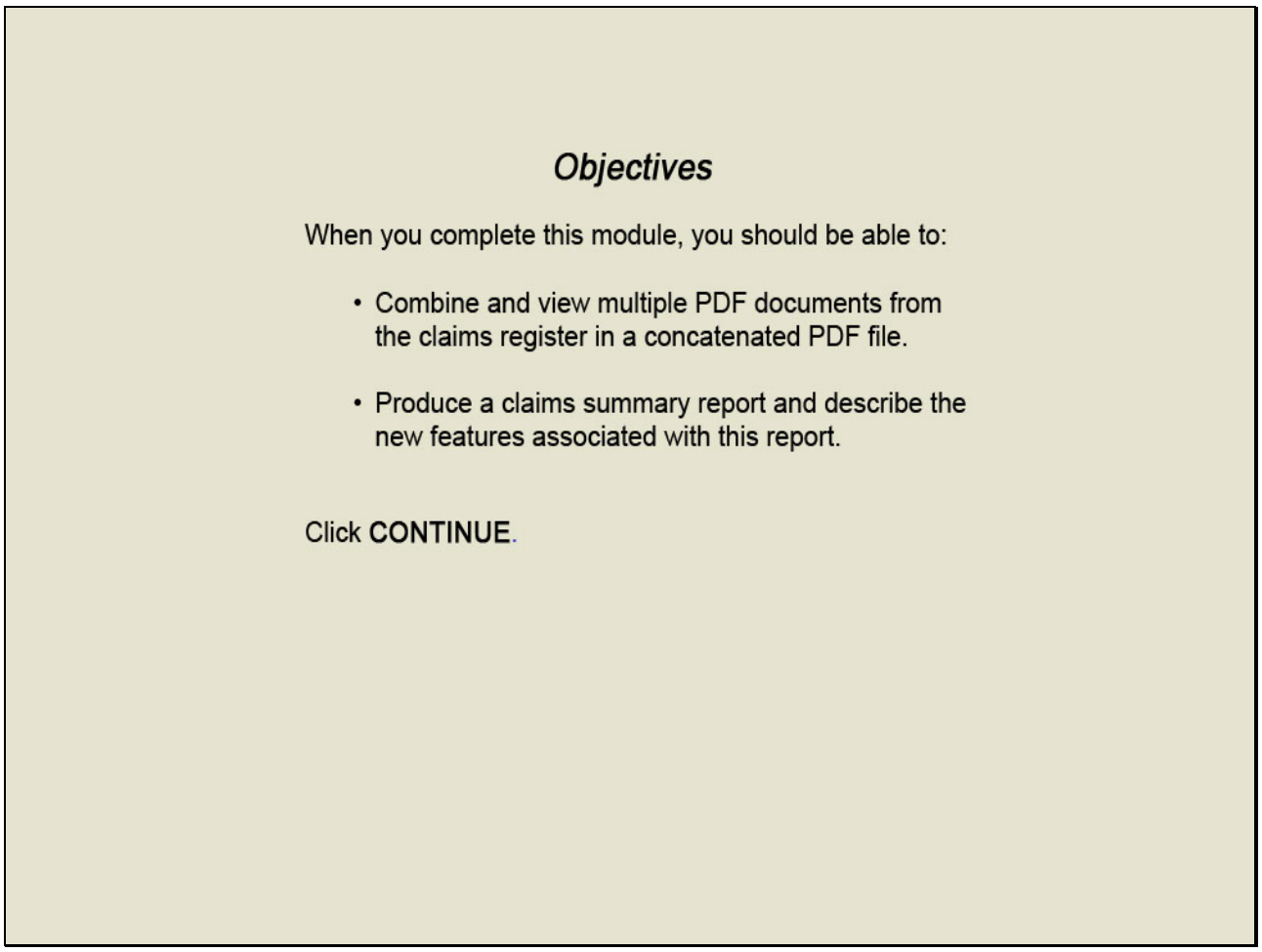
Slide 1 - Welcome



Slide notes

Click to add notes for the selected slide

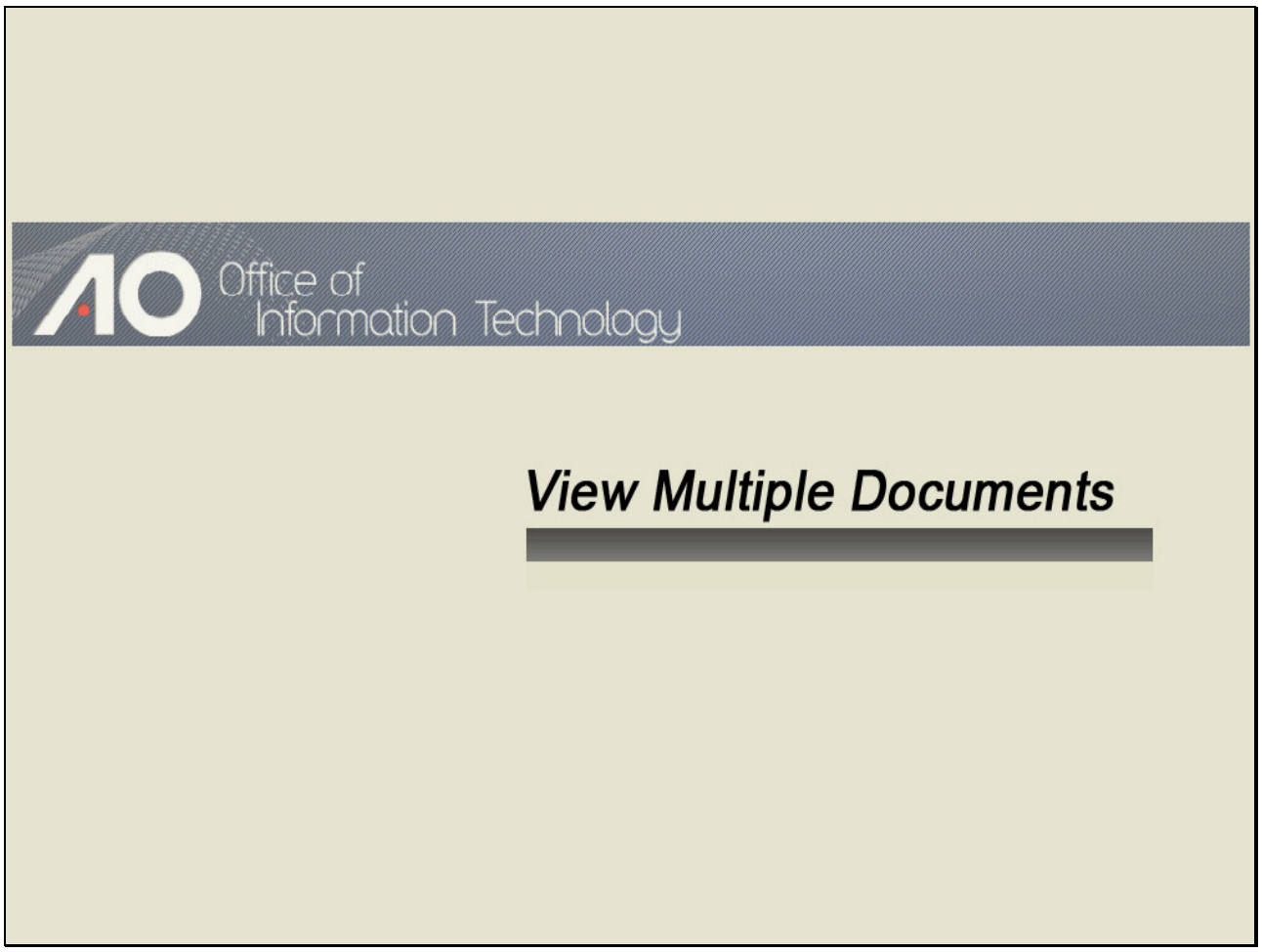
Slide 2 - Objectives



Slide notes

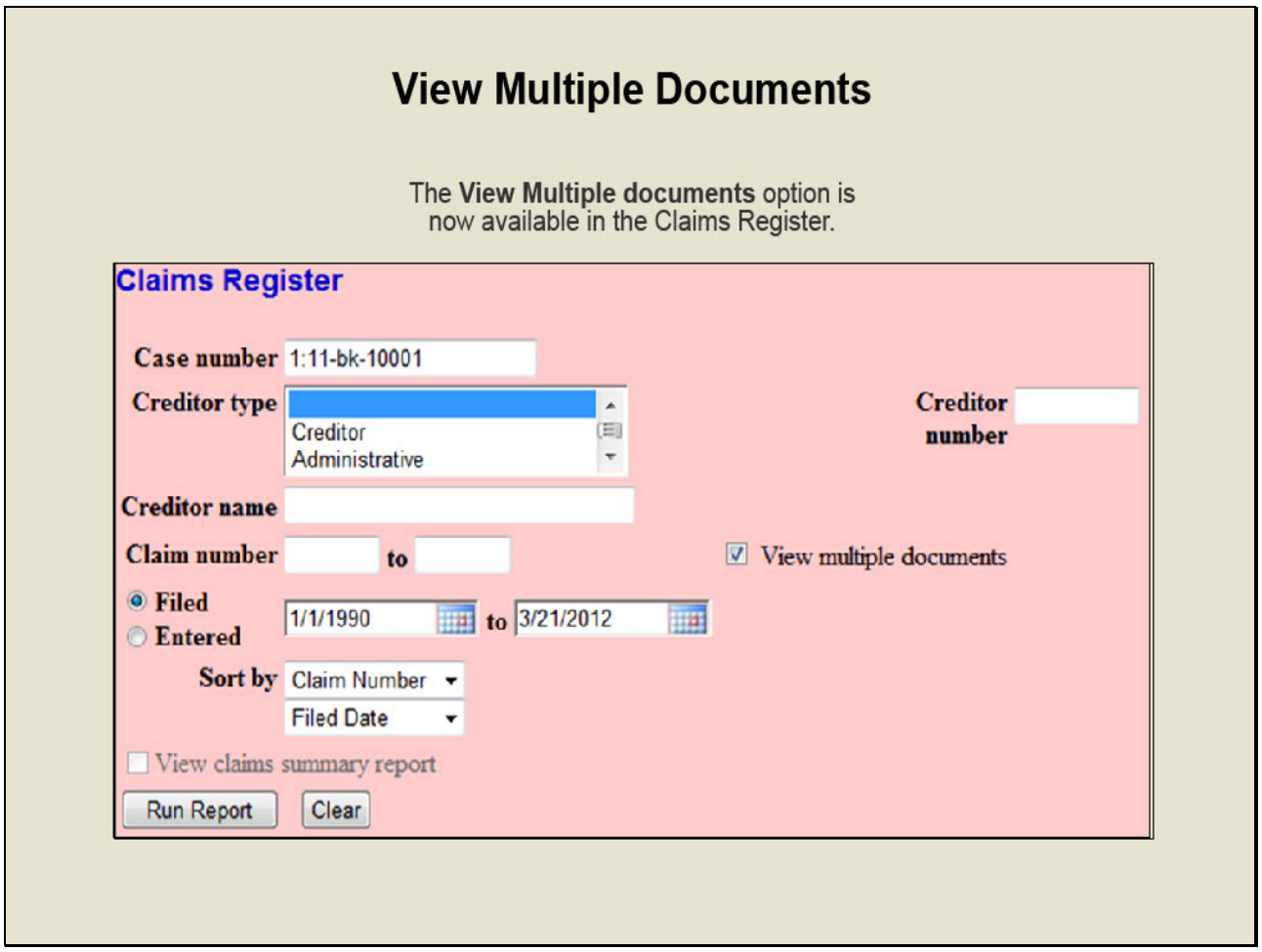
When you complete this module, you should be able to combine and view multiple documents from the claims register in one larger PDF file and produce a claims summary report and describe the new features associated with this report.

Slide 3 - View Multiple Documents



Slide notes

Slide 4 - Slide 4

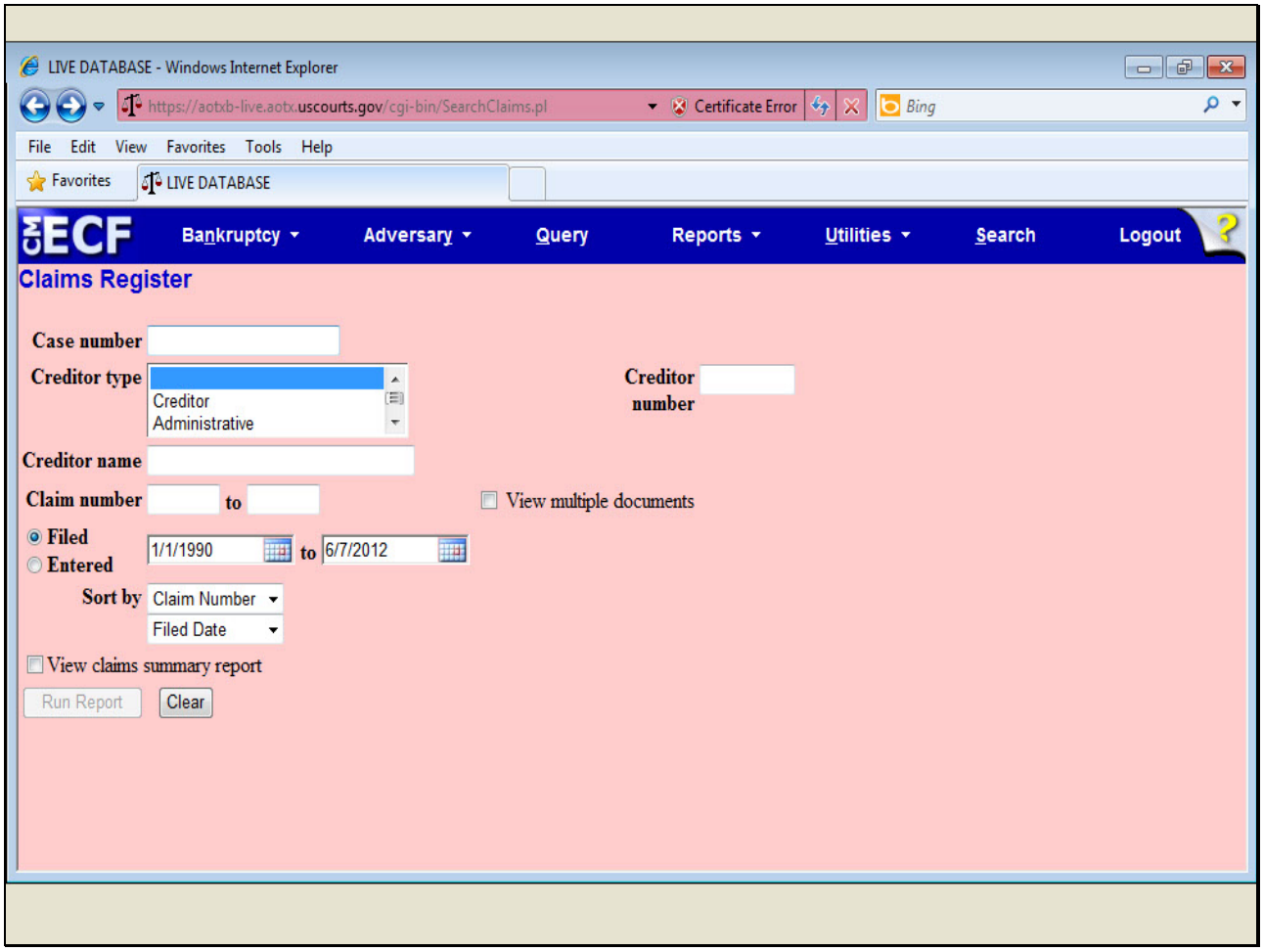


Slide notes

The Claims Register in Release 5.0 includes a number of enhancements that should be beneficial to both court staff and outside users. One of the more prominent new features is the ability to combine and view multiple documents from the Claims Register in one PDF file.

Prior to Release 5.0, users could only view multiple documents in the Docket Report. We'll now run a Claims Register report and view multiple documents in CM/ECF.

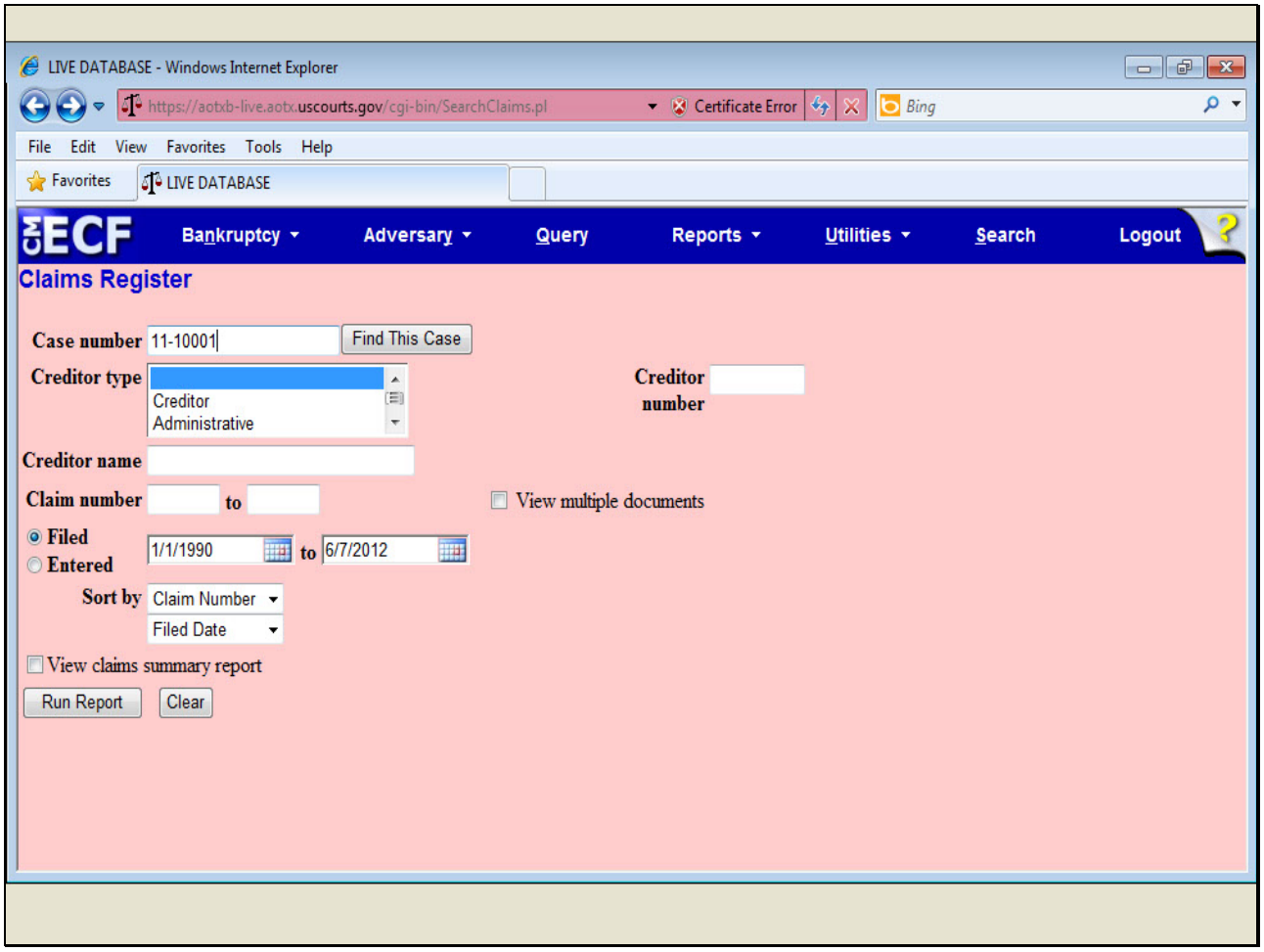
Slide 5 - Slide 5



Slide notes

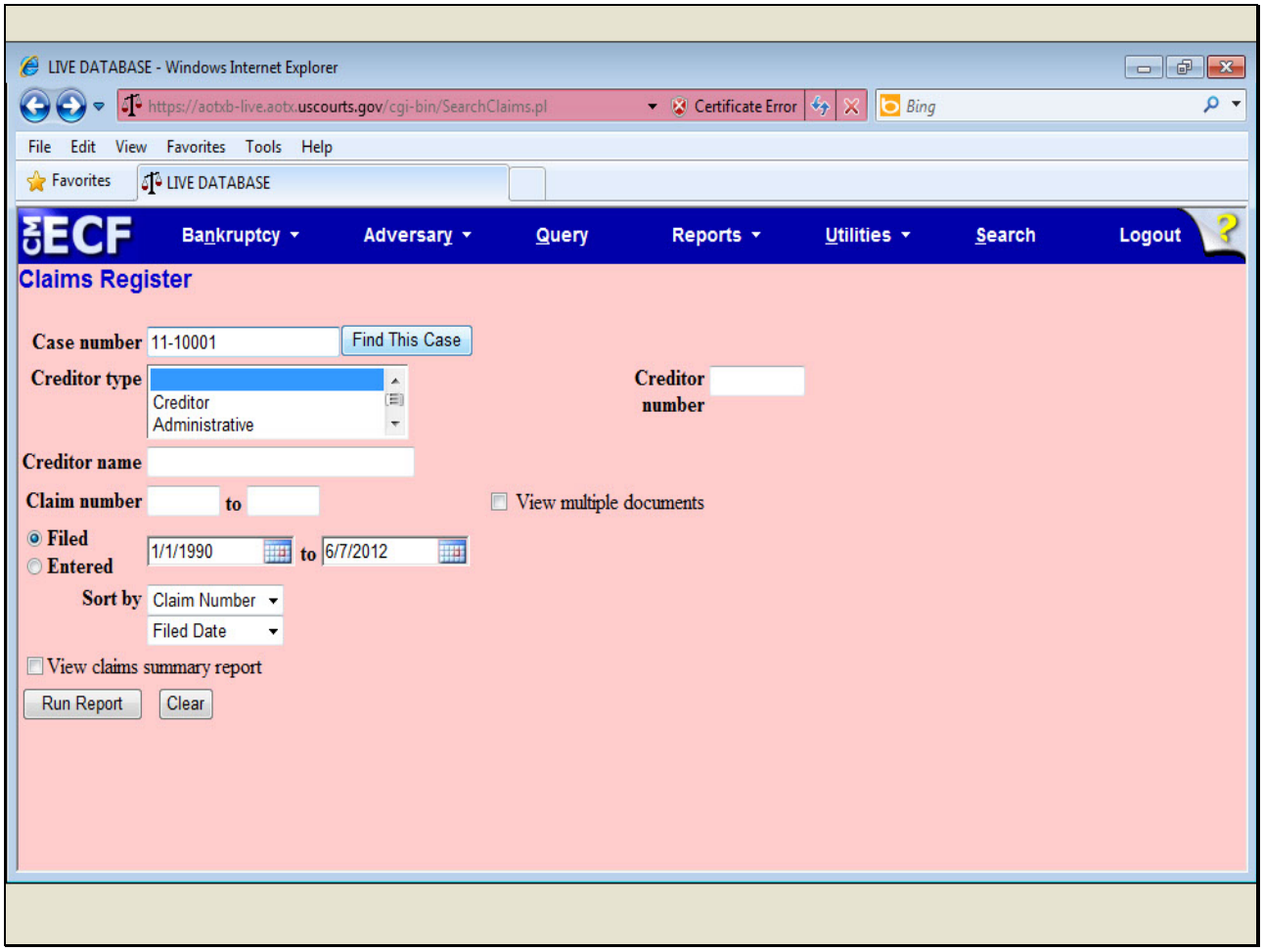
First, we'll enter the case number...

Slide 6 - Slide 6



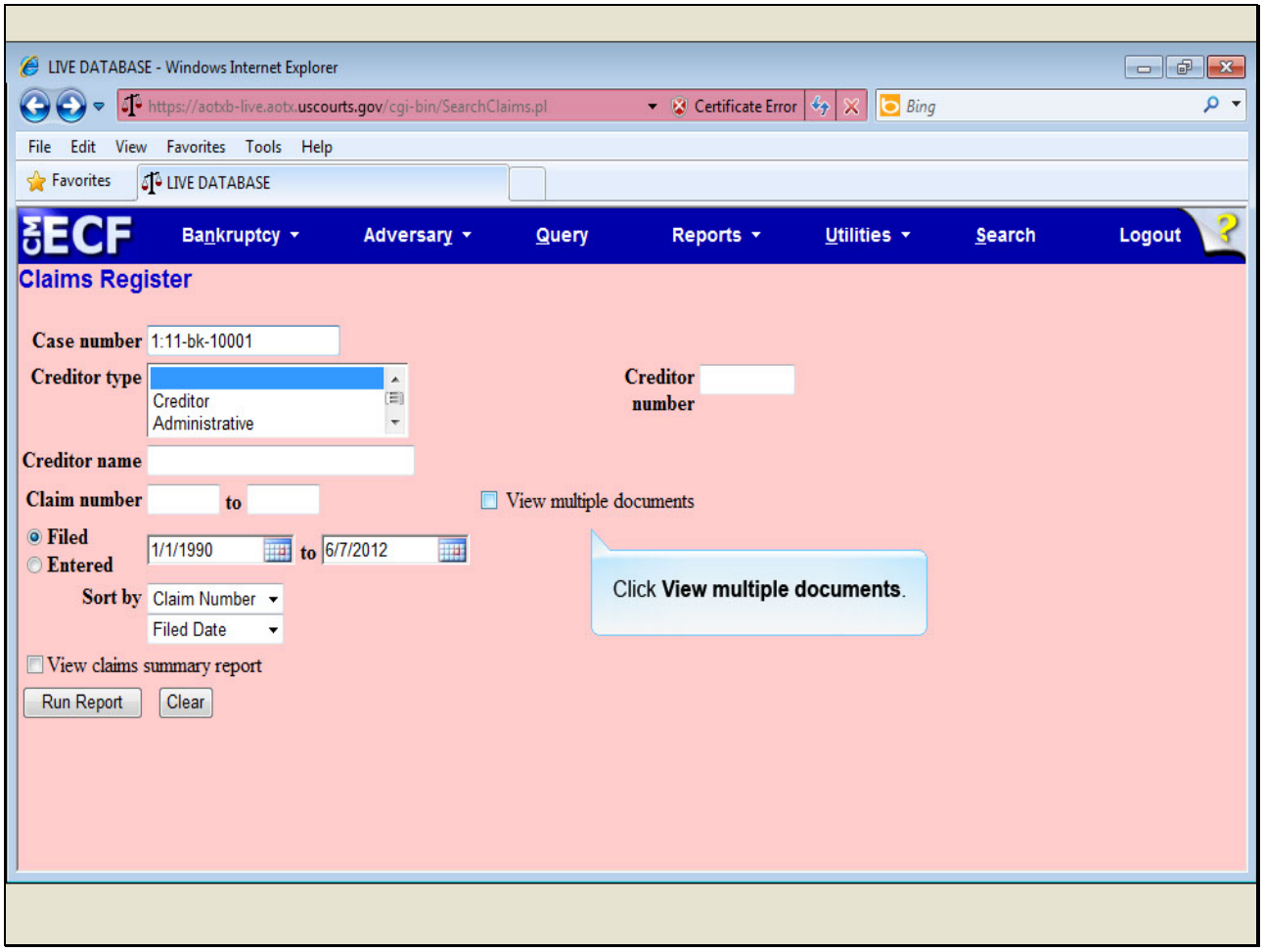
Slide notes

Slide 7 - Slide 7



Slide notes

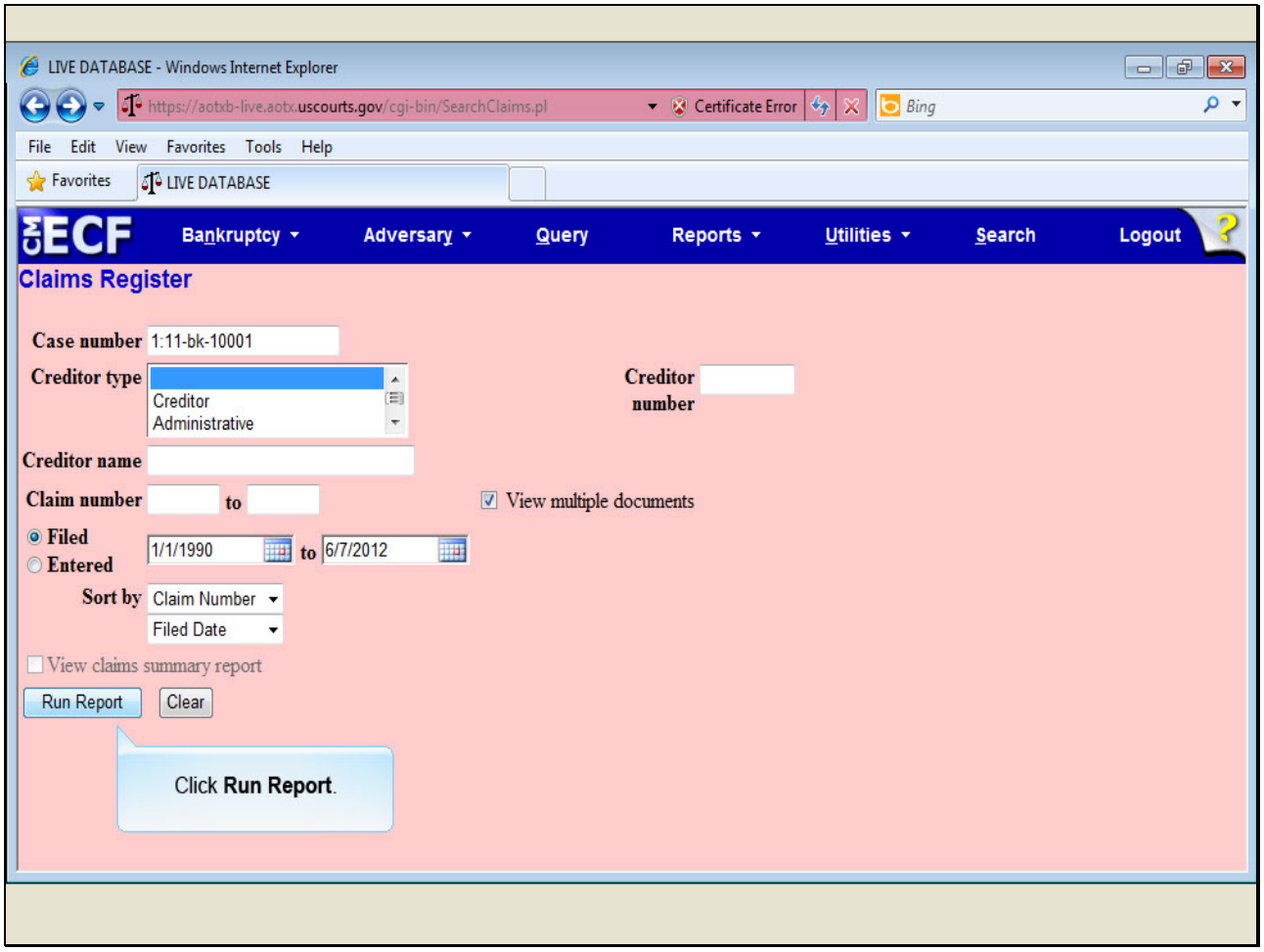
Slide 8 - Slide 8



Slide notes

...and click View multiple documents.

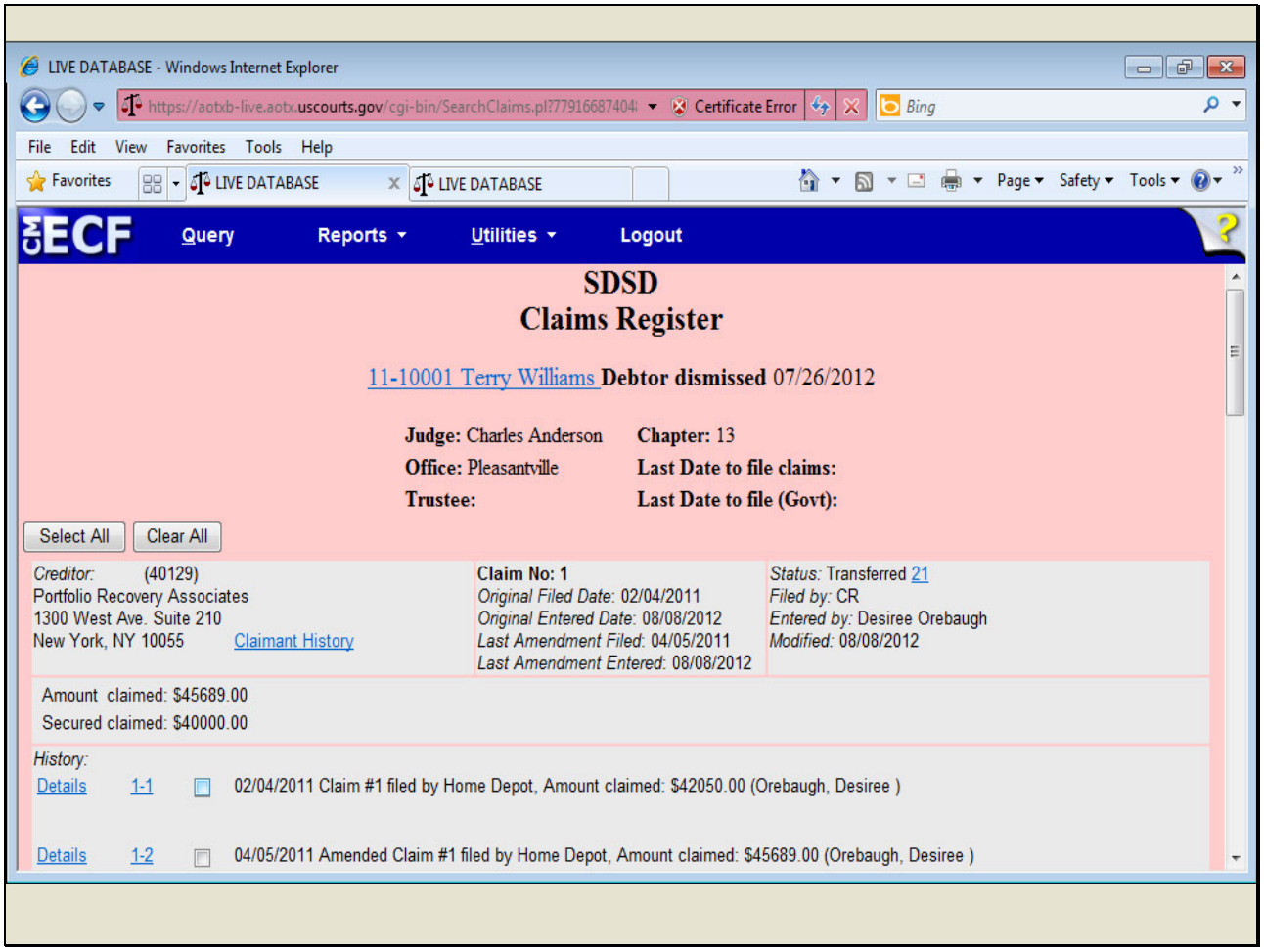
Slide 9 - Slide 9



Slide notes

Note that when the View multiple documents check box is selected, the View claims summary report selection is grayed out. We'll discuss the View claims summary report option later in this lesson. Click Run Report.

Slide 10 - Slide 10

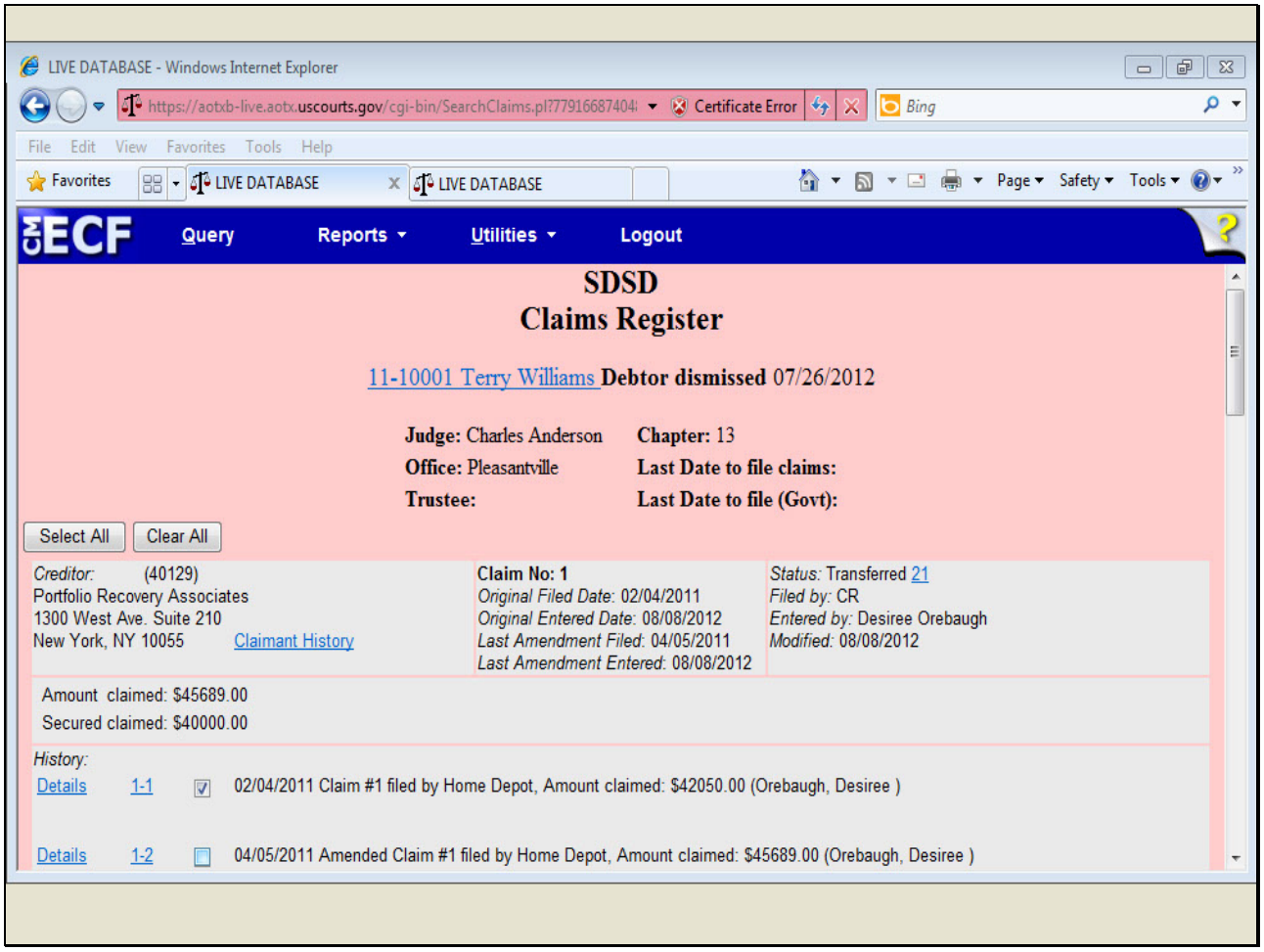


Slide notes

When the View multiple documents option is selected, the Claims Register report will include a check box next to each claim, claim attachment, or claim related proceeding. Claim related entries are copied directly from the docket report for more history of this claim.

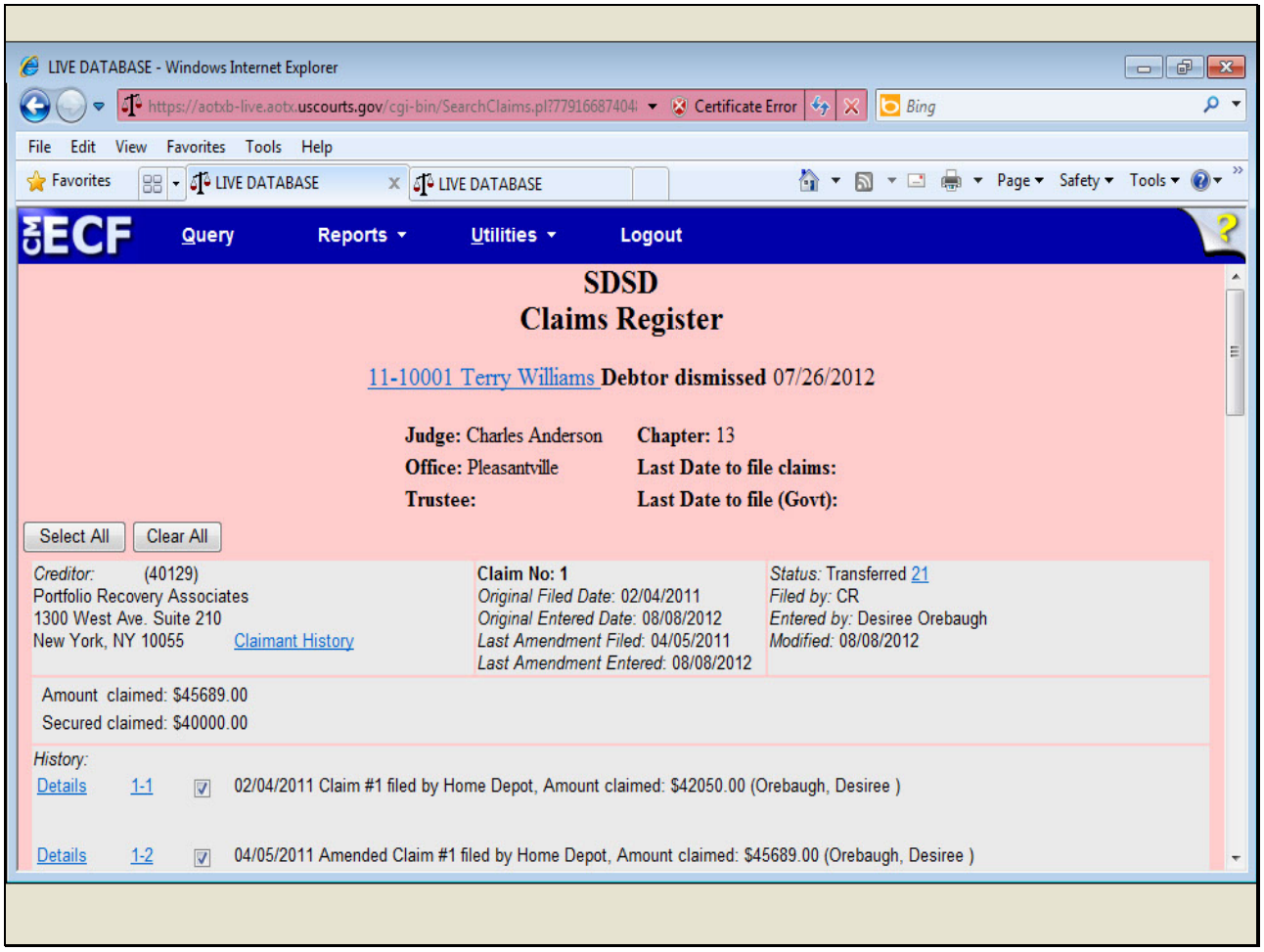
To include all documents in the Claims Register in one large PDF file, click Select All. That way, you don't have to print each claim and related filing separately. In this example, I will select three documents by clicking the corresponding check boxes.

Slide 11 - Slide 11



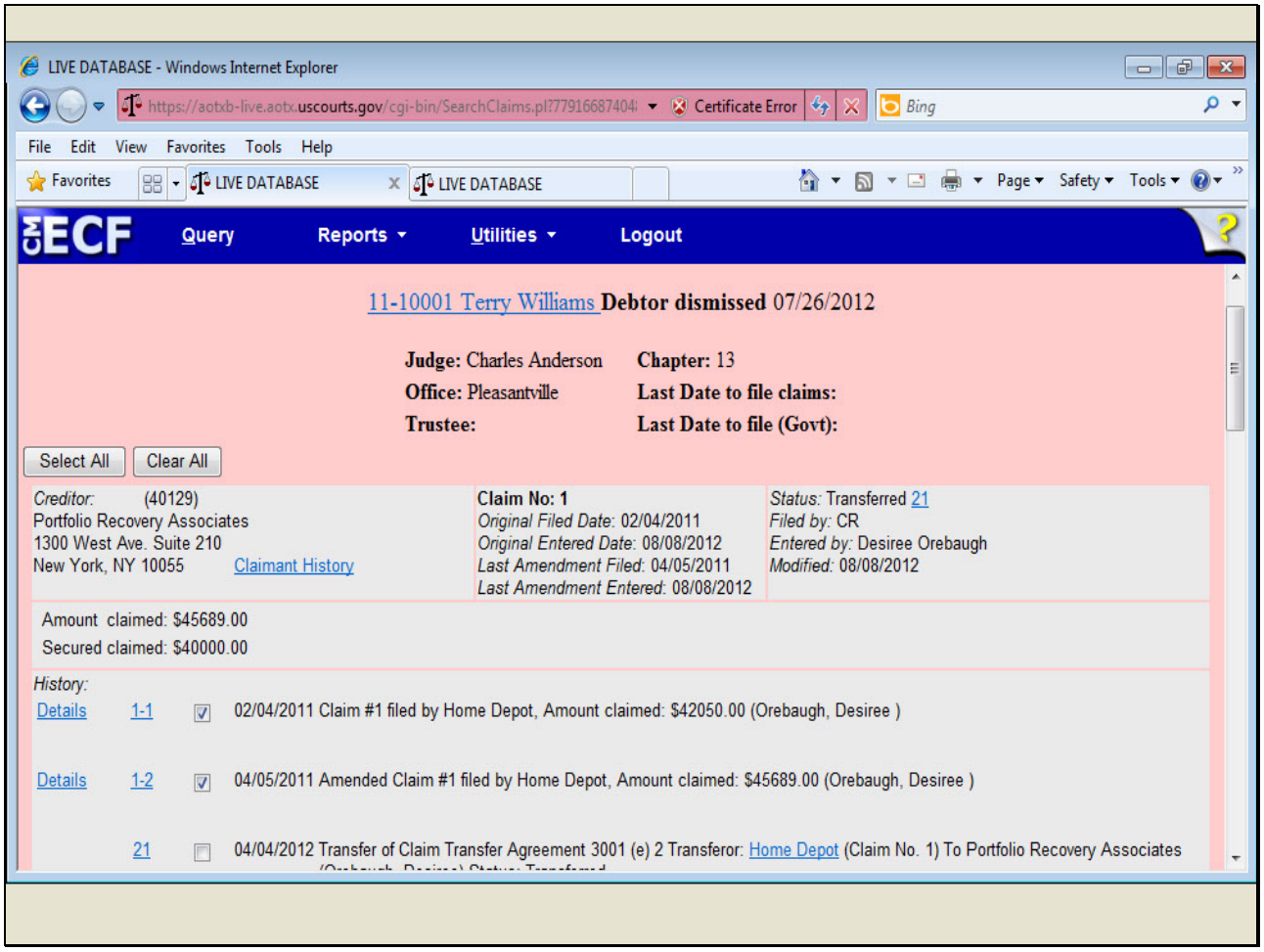
Slide notes

Slide 12 - Slide 12



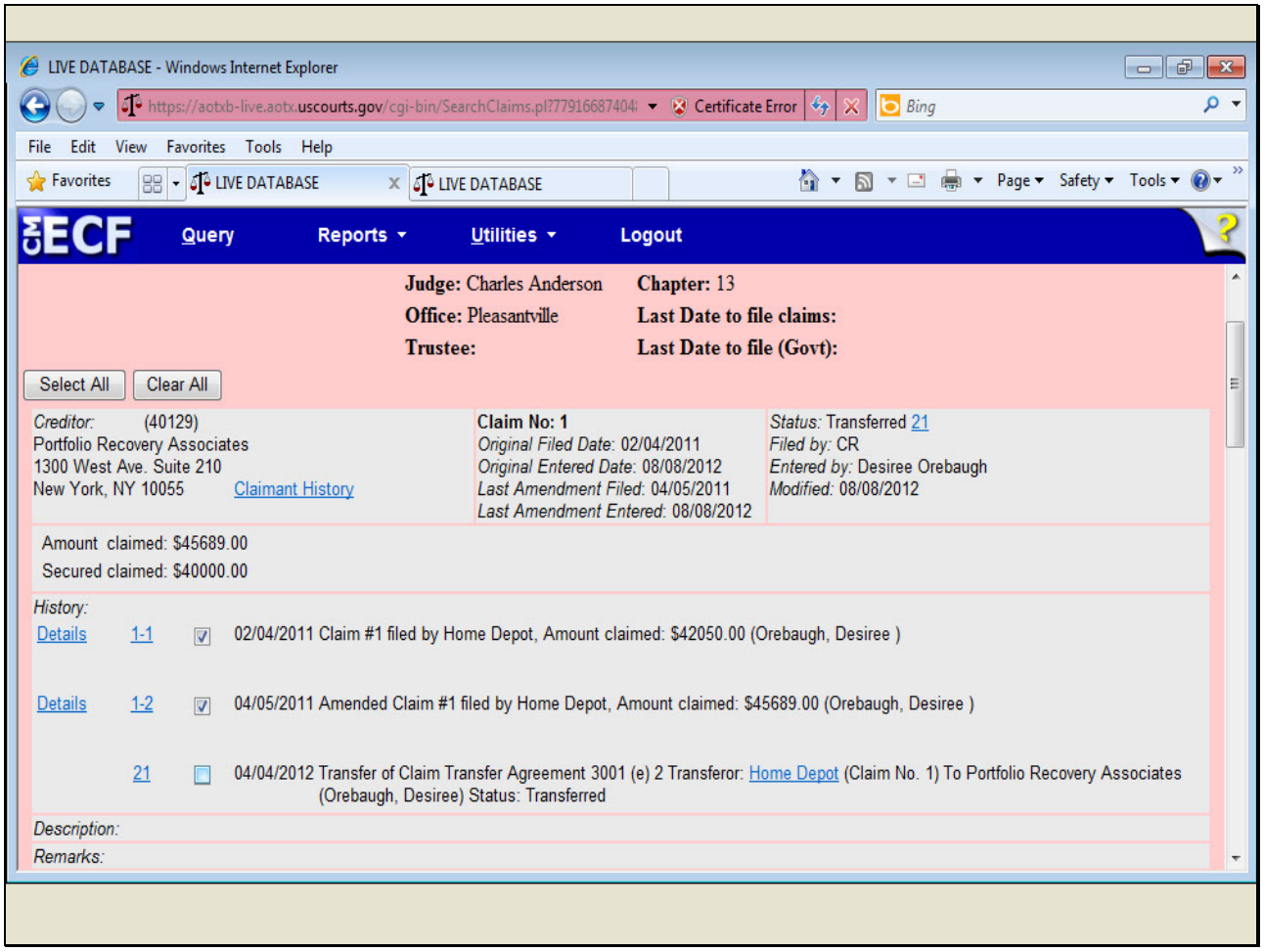
Slide notes

Slide 13 - Slide 13



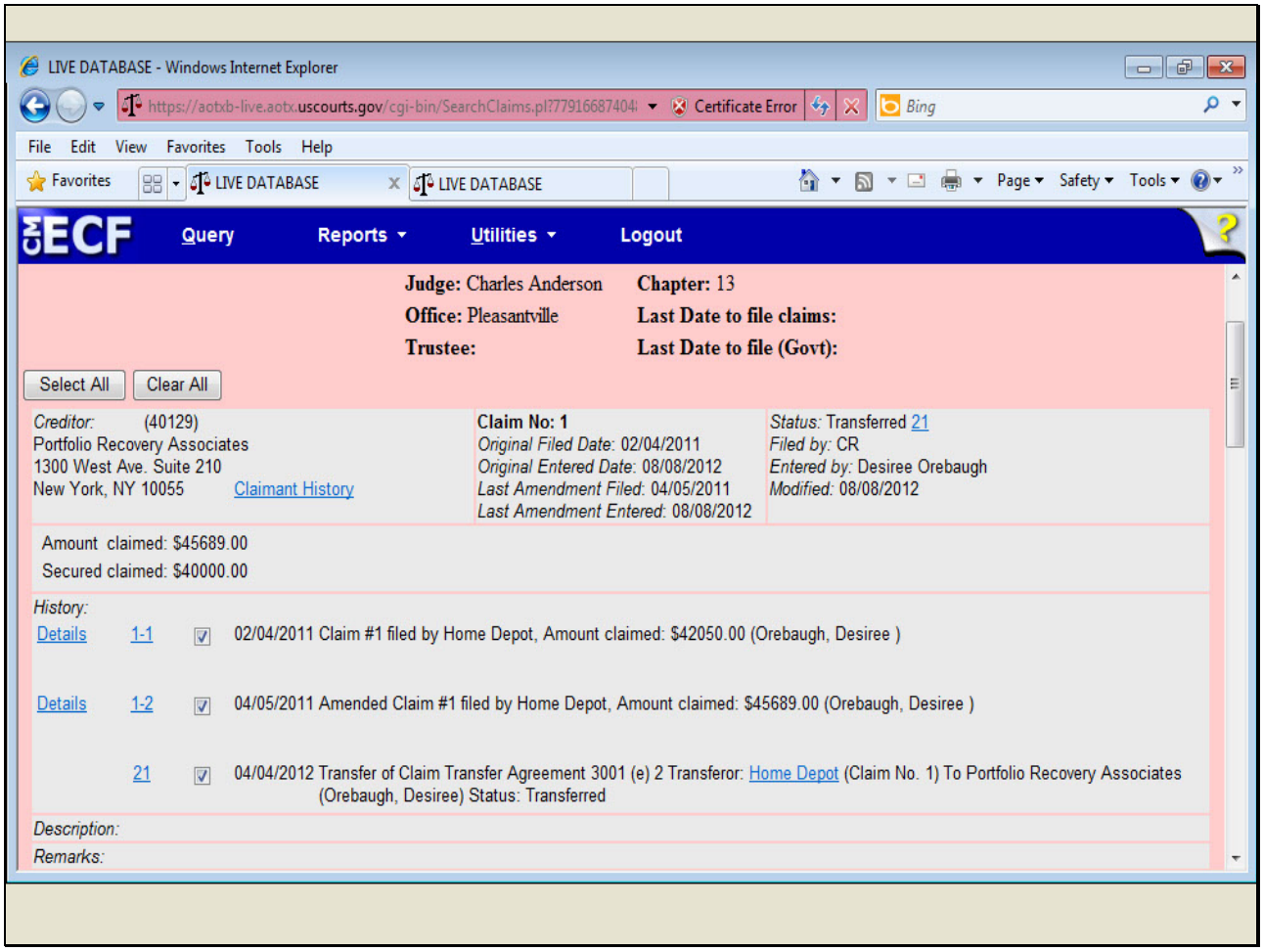
Slide notes

Slide 14 - Slide 14



Slide notes

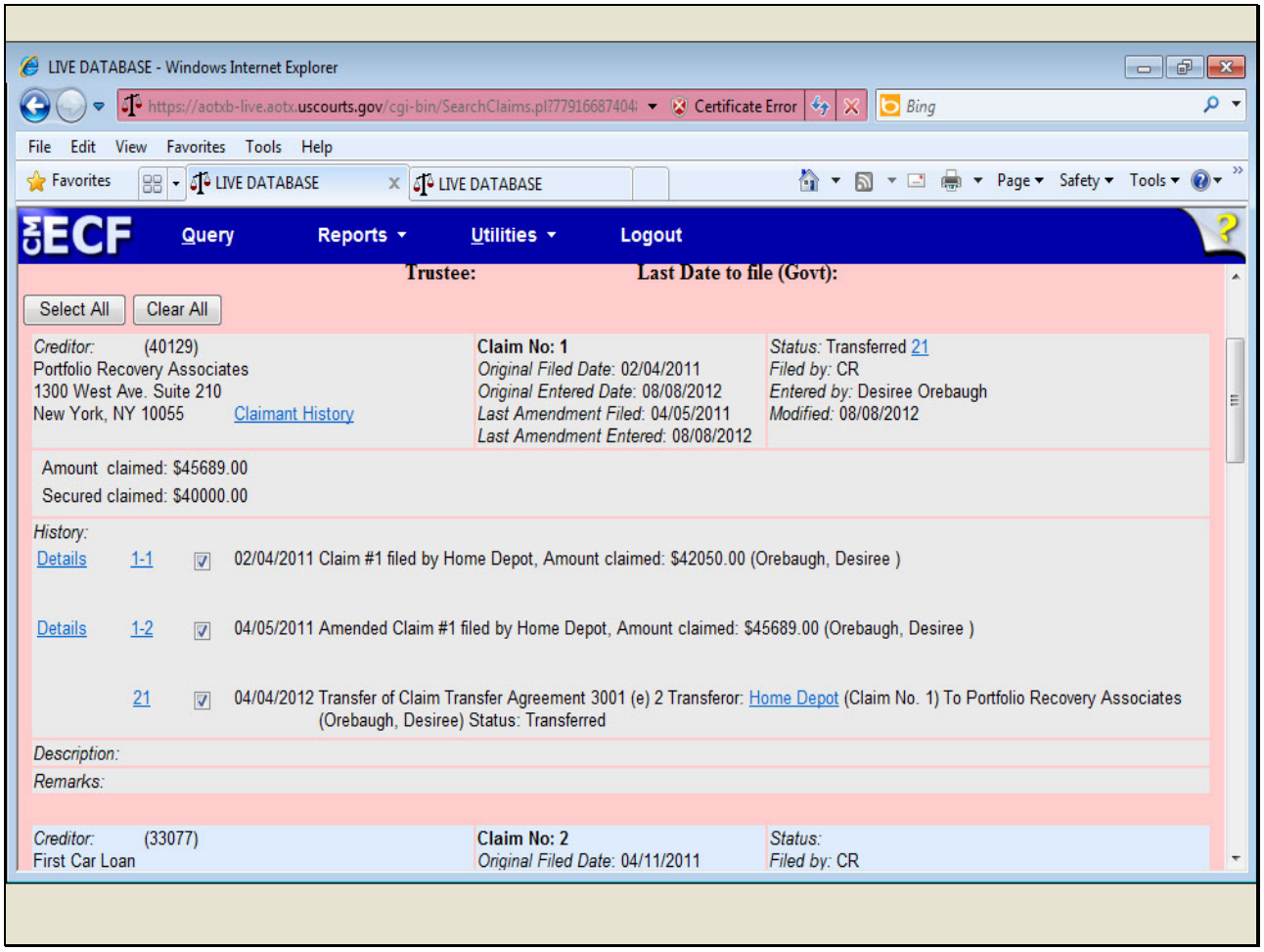
Slide 15 - Slide 15



Slide notes

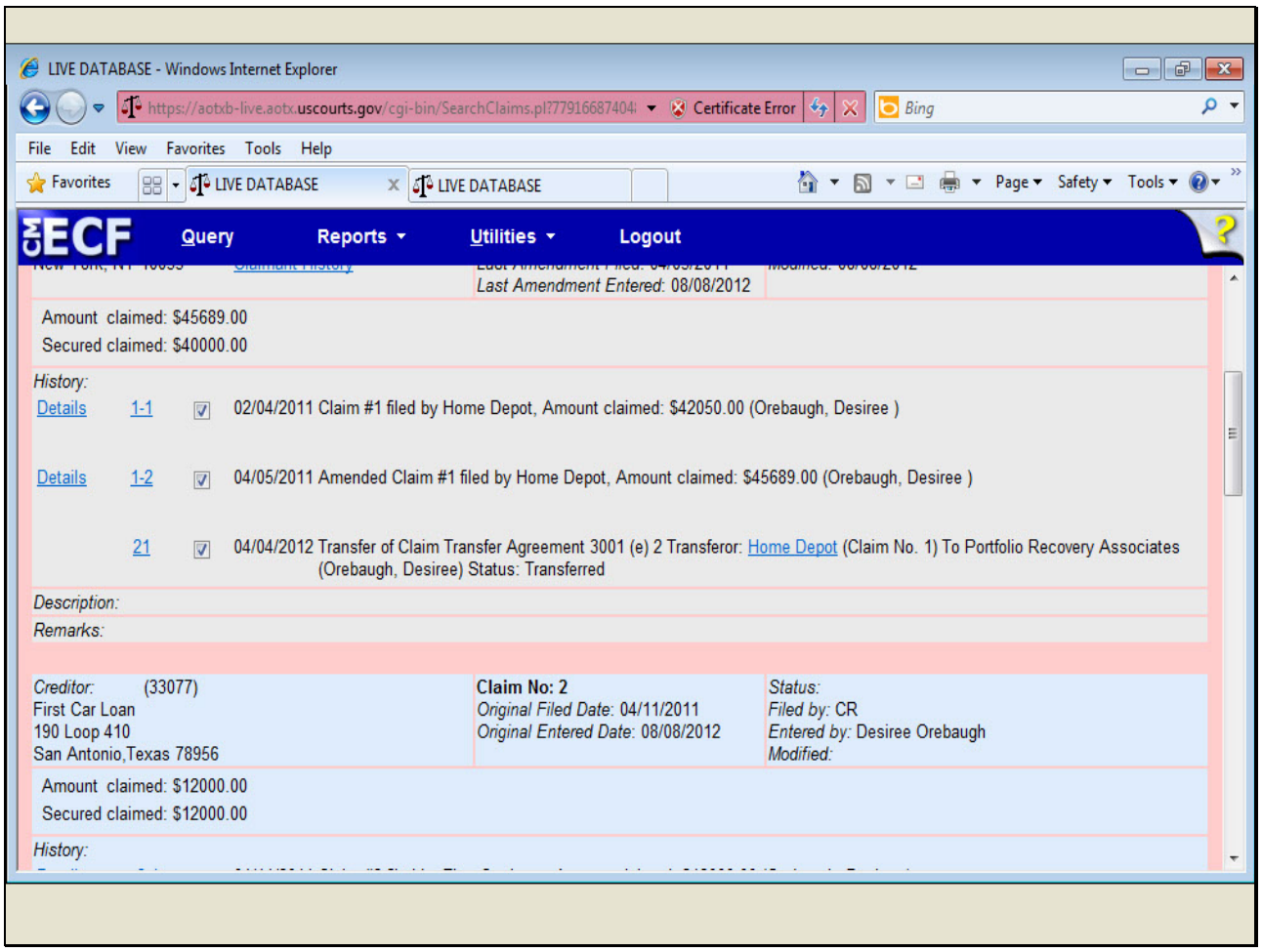
Once all the documents have been selected, I'll scroll to the bottom of the screen.

Slide 16 - Slide 16



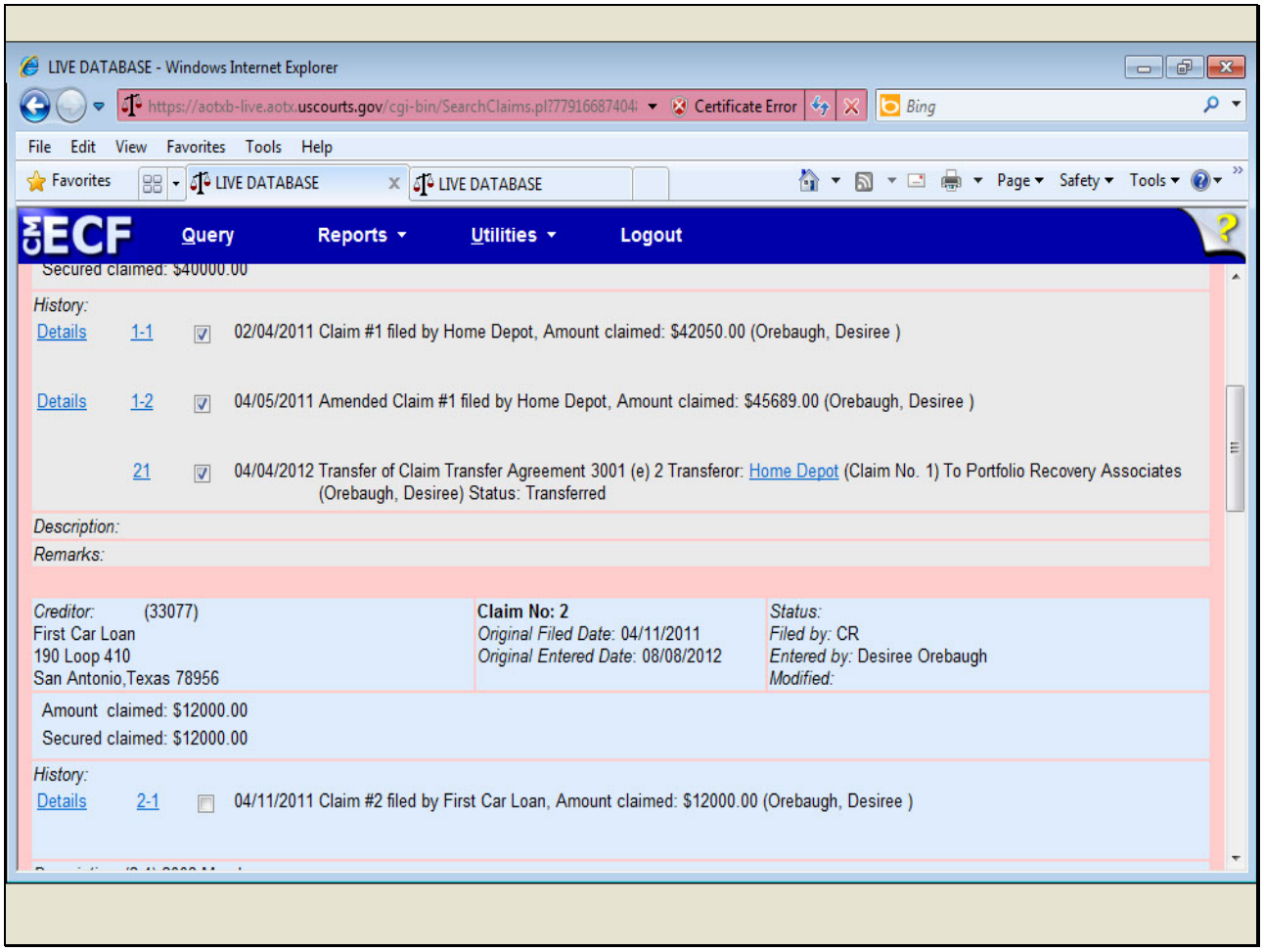
Slide notes

Slide 17 - Slide 17



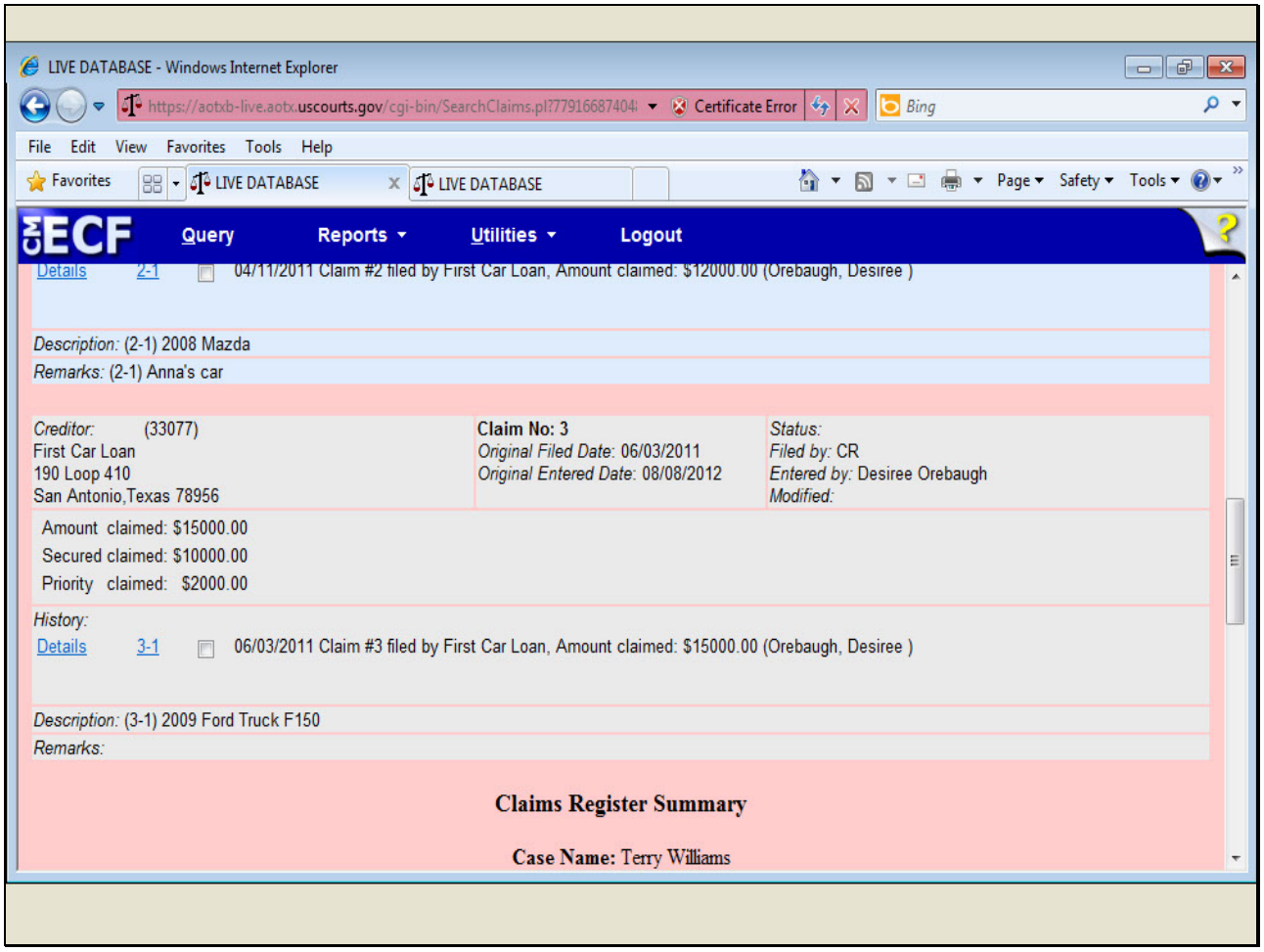
Slide notes

Slide 18 - Slide 18



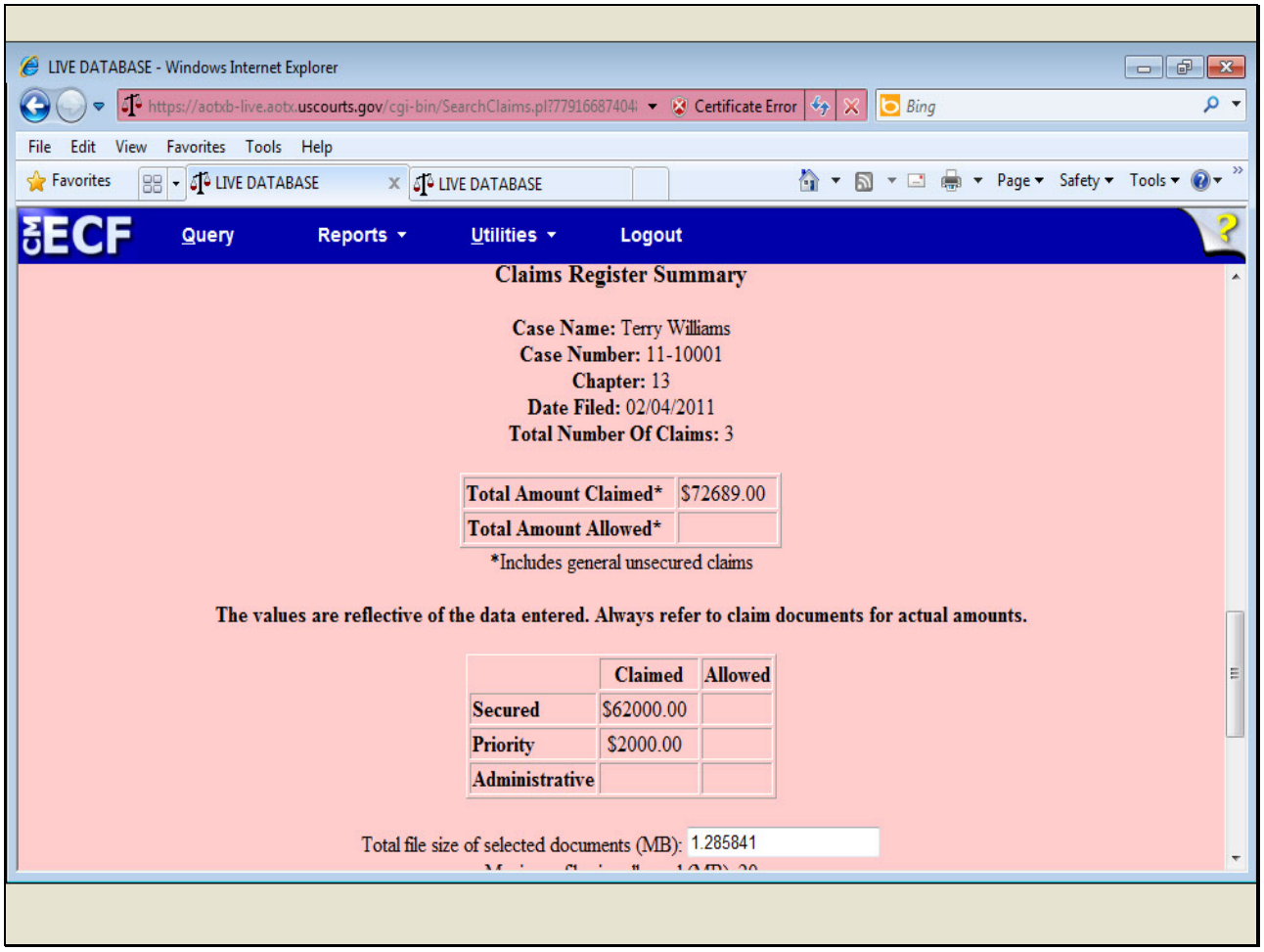
Slide notes

Slide 19 - Slide 19



Slide notes

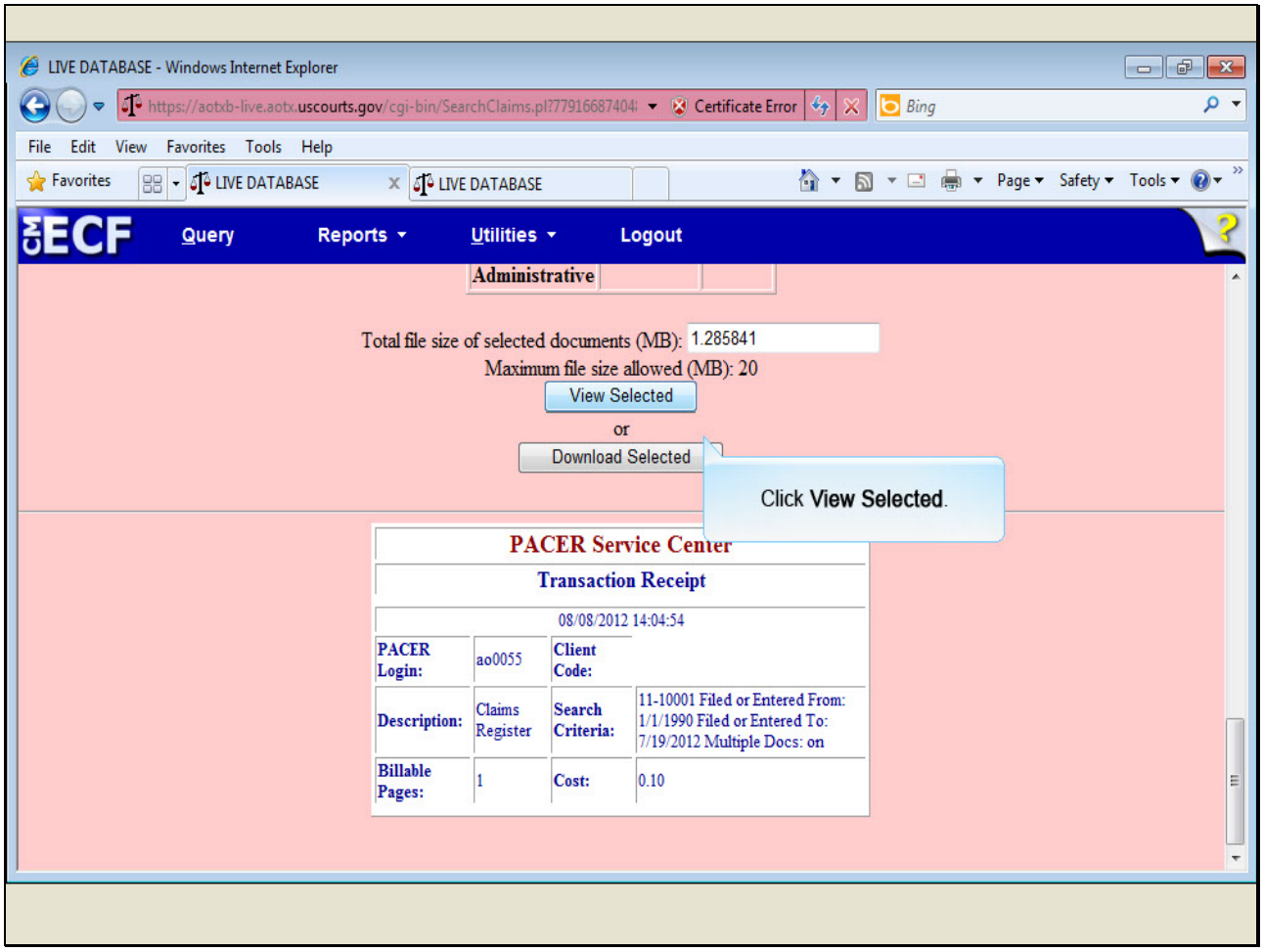
Slide 20 - Slide 20



Slide notes

In addition to the Secured and Priority claimed amounts, there is now an Administrative field for court use only. I'll scroll down to view the rest of the report.

Slide 21 - Slide 21

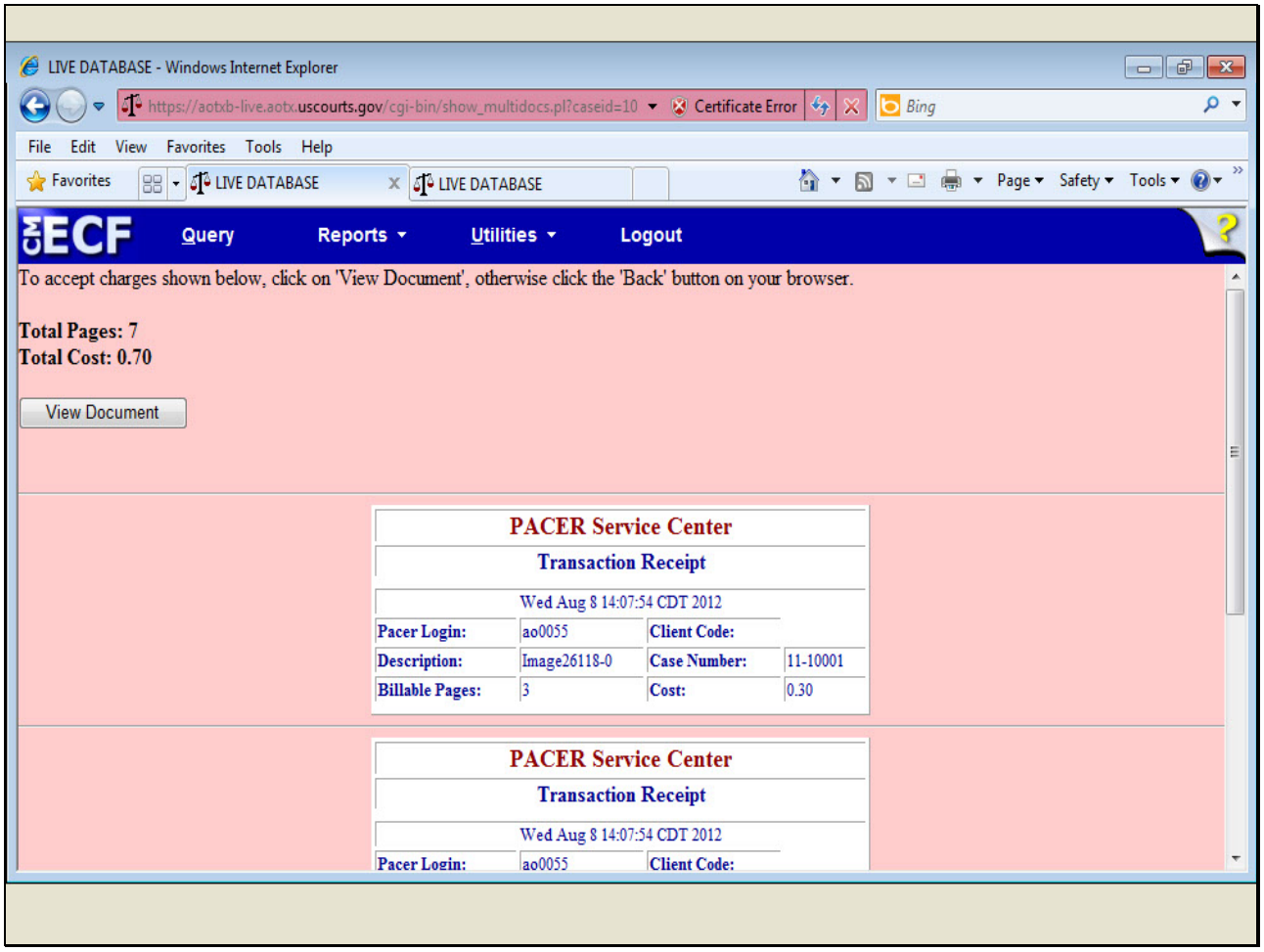


Slide notes

The option to View Selected or Download Selected documents displays at the end of this screen. When multiple documents are selected, all documents are presented in one concatenated (or linked) PDF/A document.

The court may have a restriction on the size of PDF files. If the total file size of the selected documents exceeds the court's maximum file size limit, an error message will display. I'll now click View Selected.

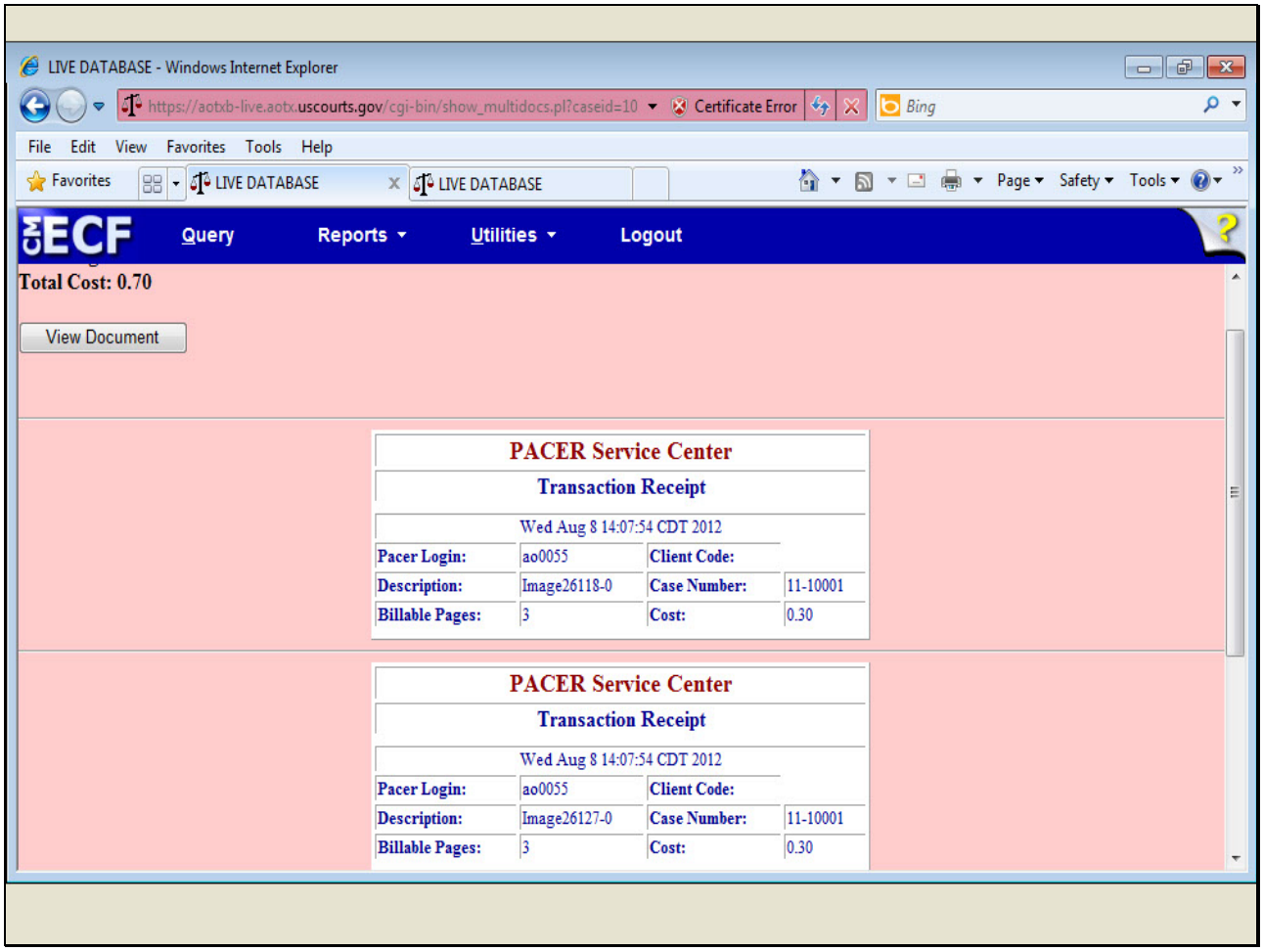
Slide 22 - Slide 22



Slide notes

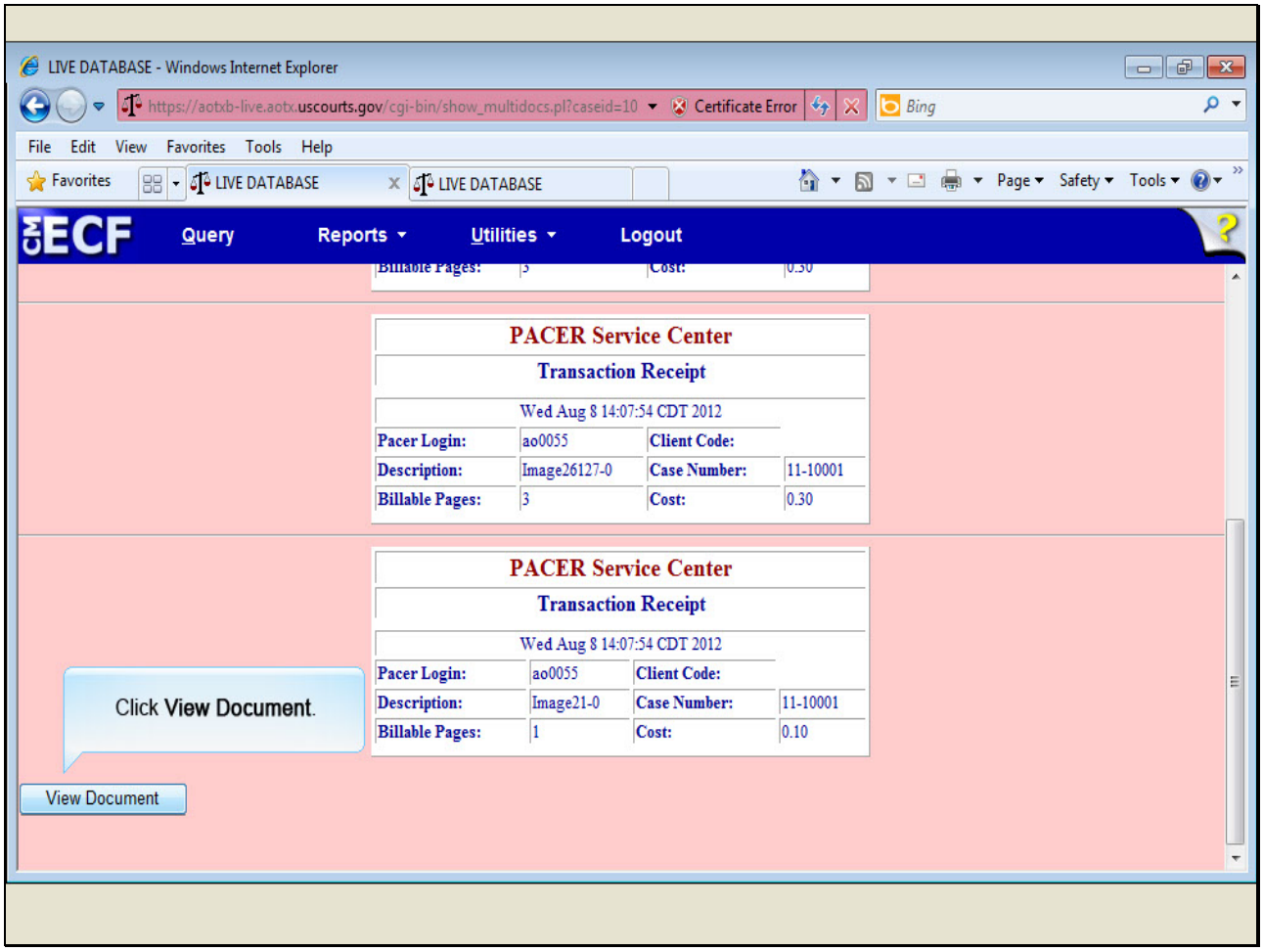
A confirmation screen opens, listing the total pages of the PDF documents and the total cost. In this example, there are three documents with seven pages, totaling 70 cents. A transaction receipt is listed for each document. If we scroll down...

Slide 23 - Slide 23



Slide notes

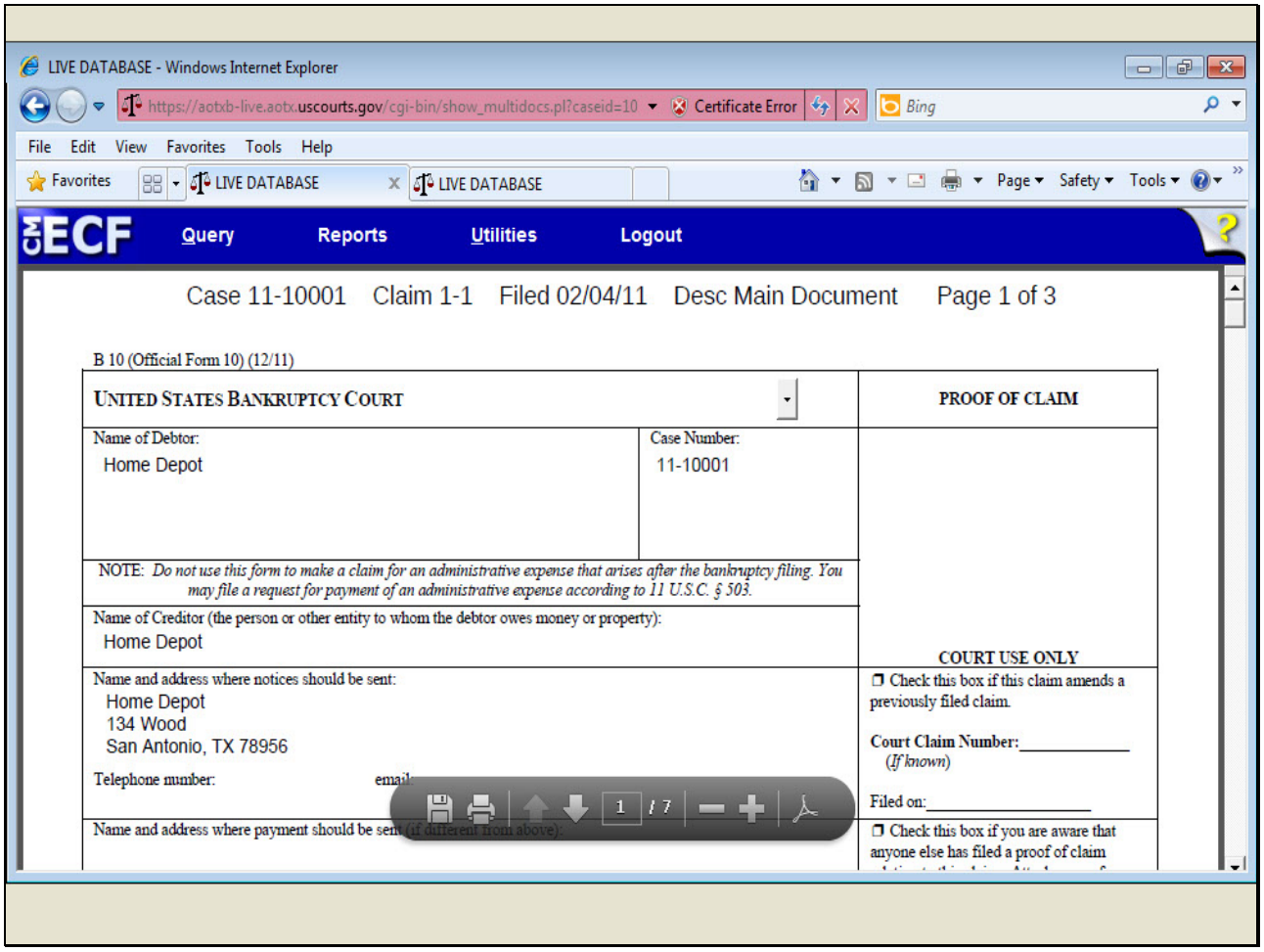
Slide 24 - Slide 24



Slide notes

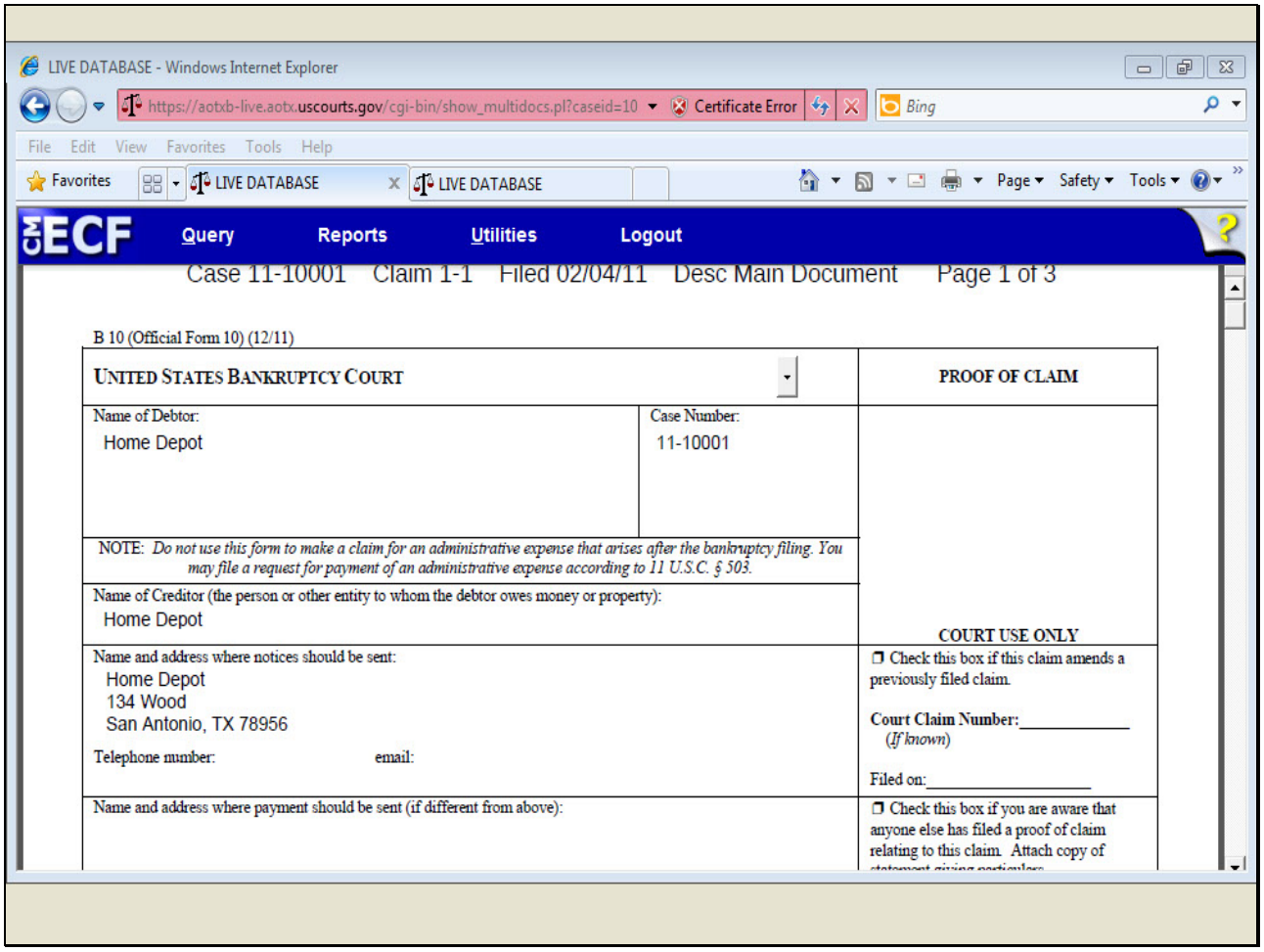
...we can see each receipt. To accept the charges and view the documents, click View Document.

Slide 25 - Slide 25



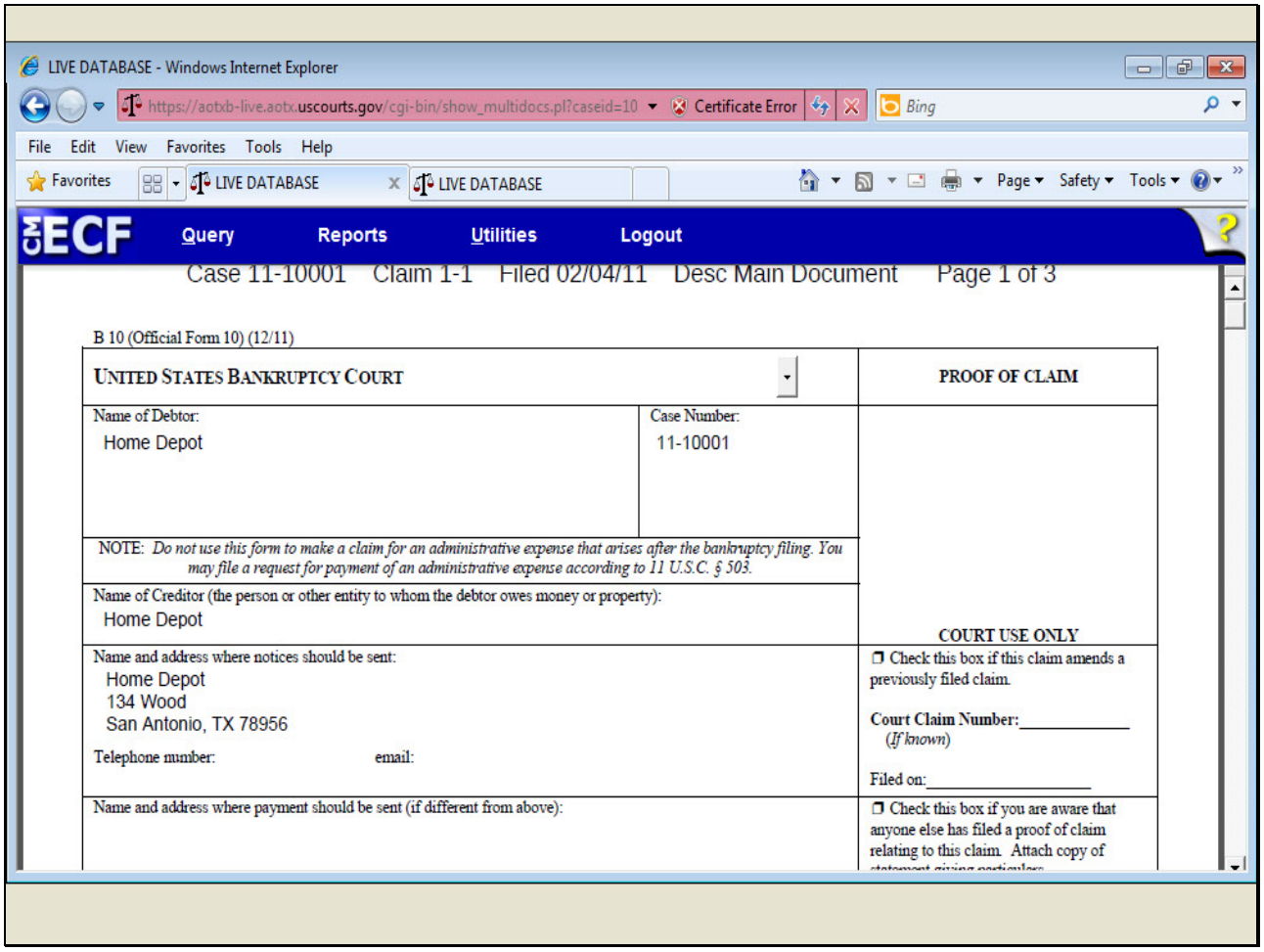
Slide notes

Slide 26 - Slide 26



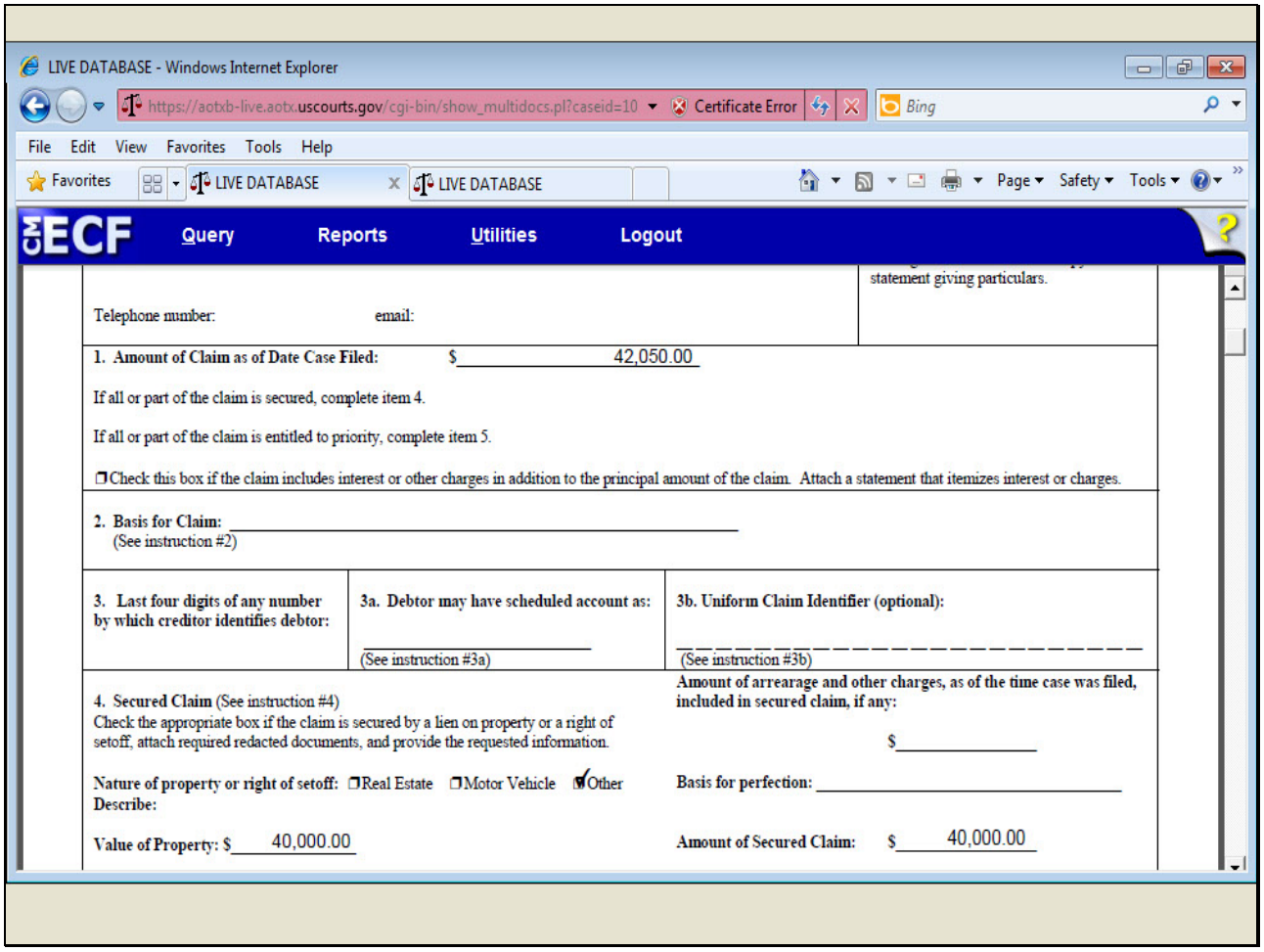
Slide notes

Slide 27 - Slide 27



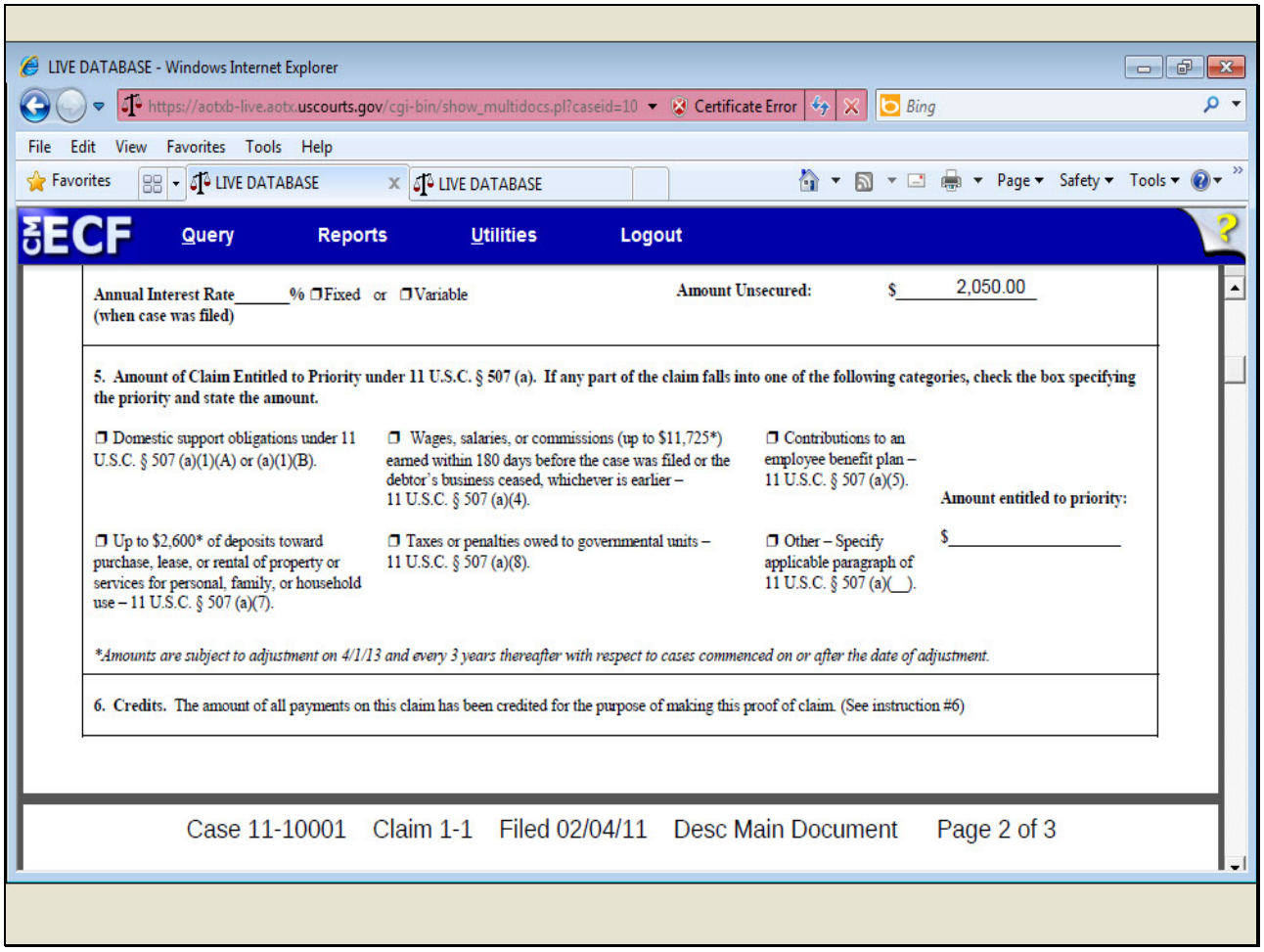
Slide notes

Slide 28 - Slide 28



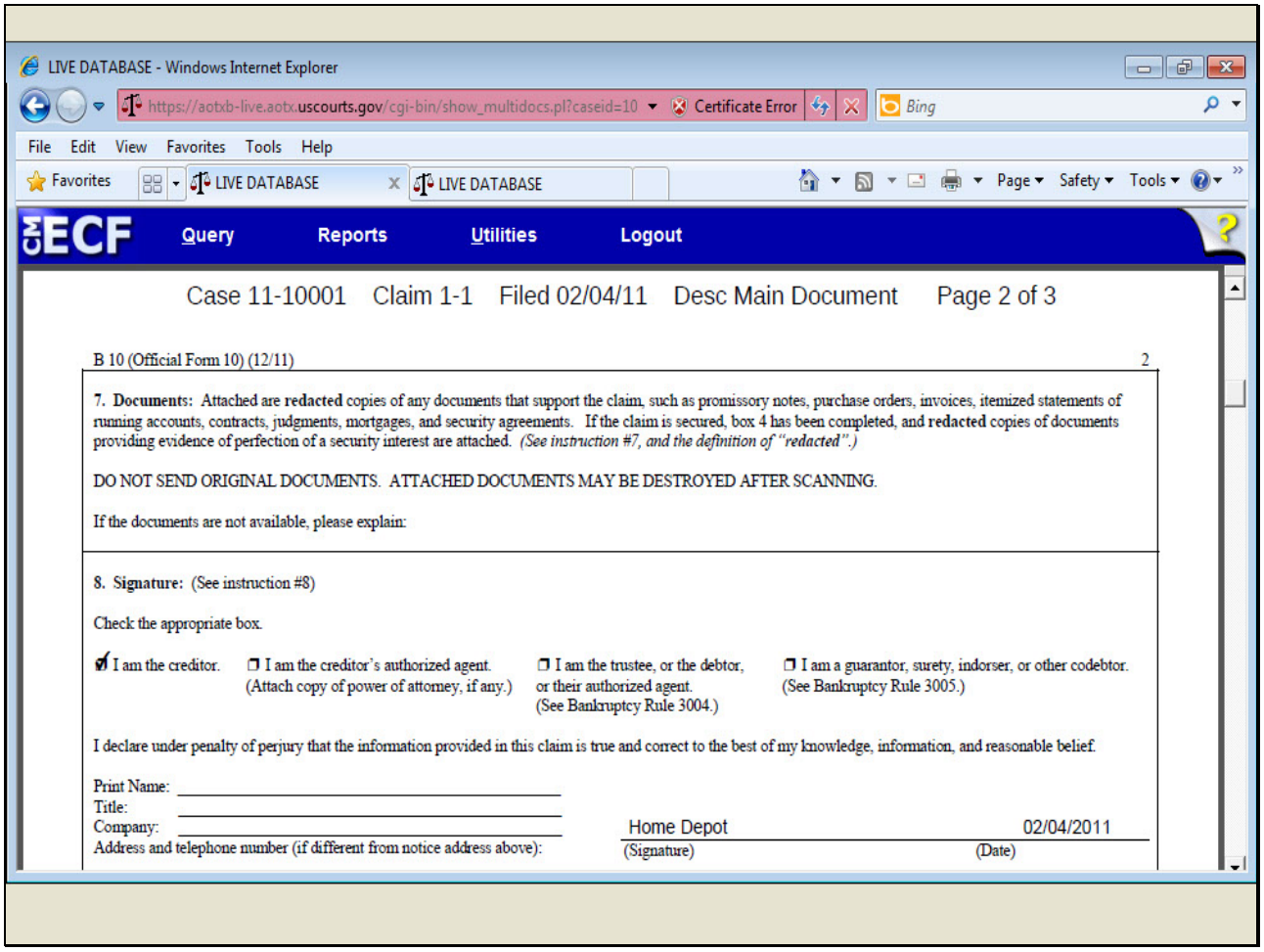
Slide notes

Slide 29 - Slide 29



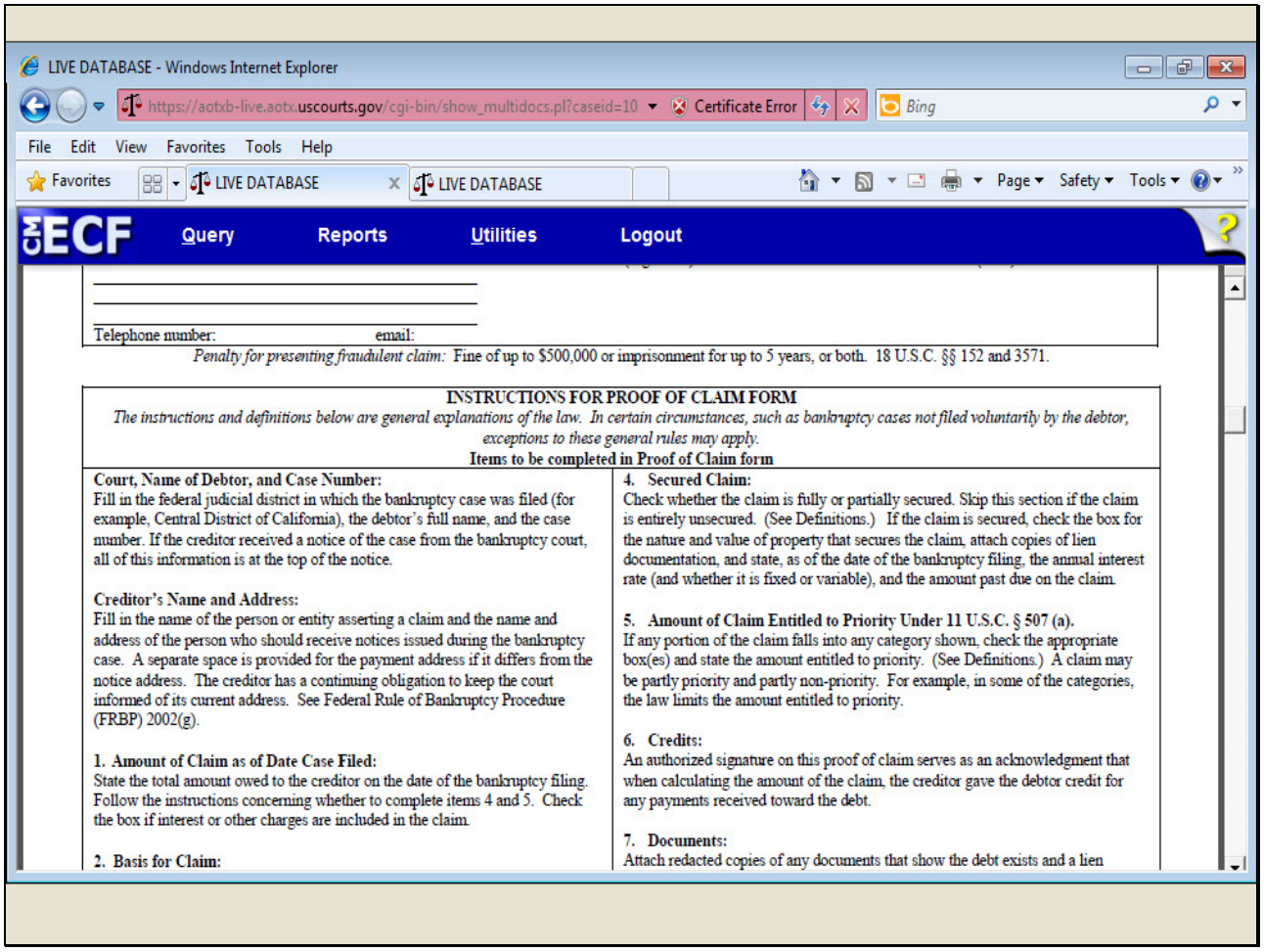
Slide notes

Slide 30 - Slide 30



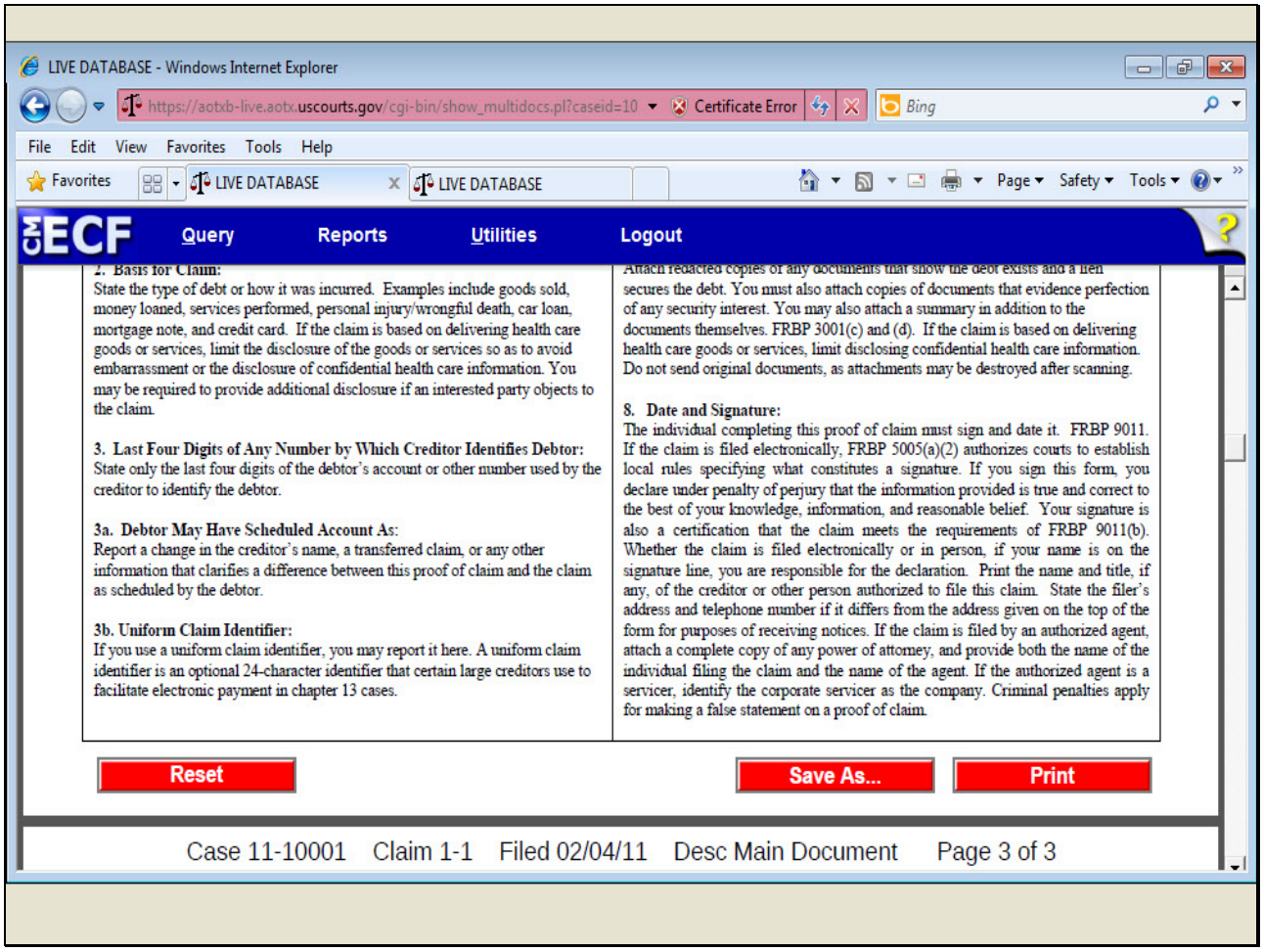
Slide notes

Slide 31 - Slide 31



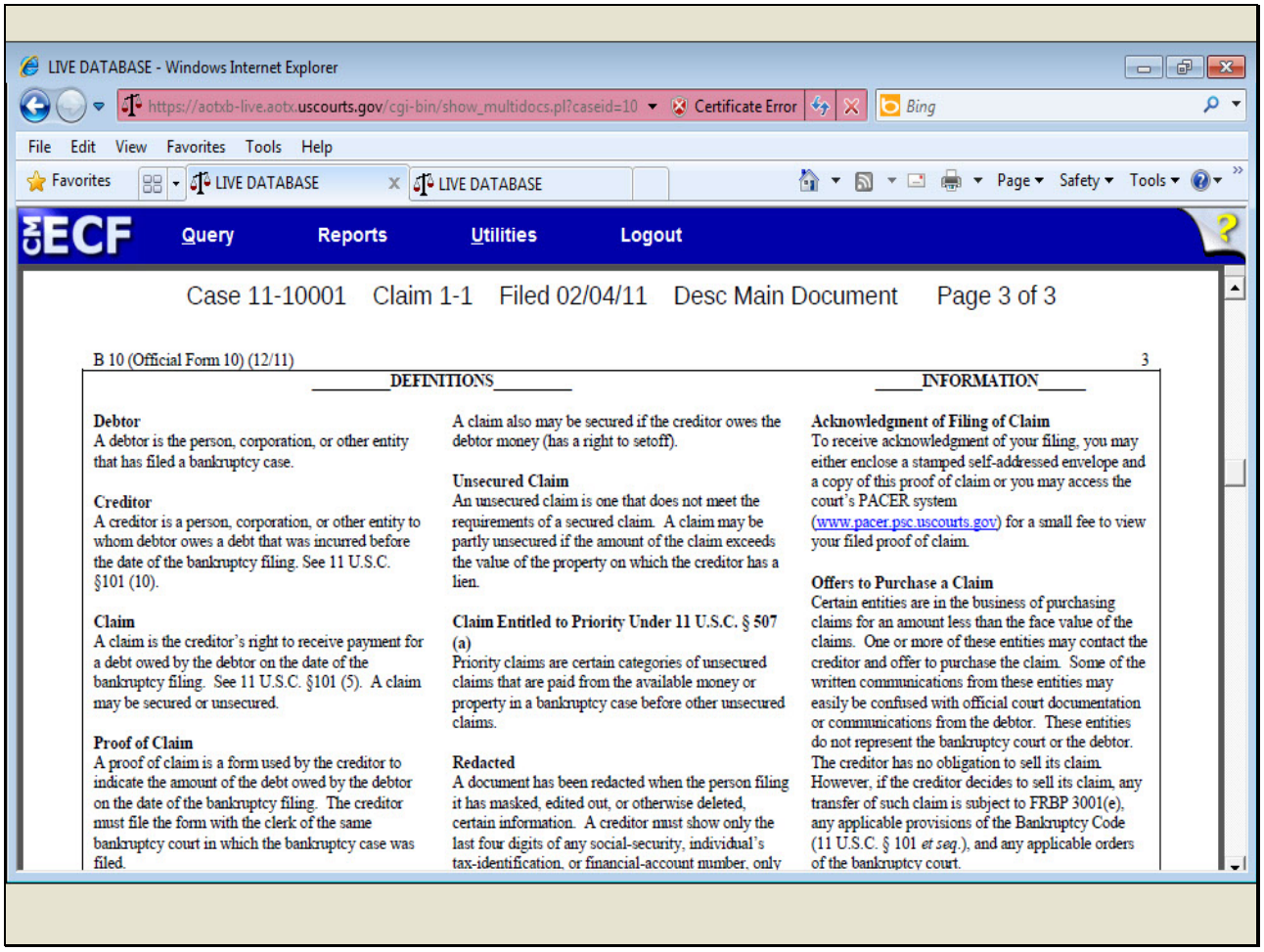
Slide notes

Slide 32 - Slide 32



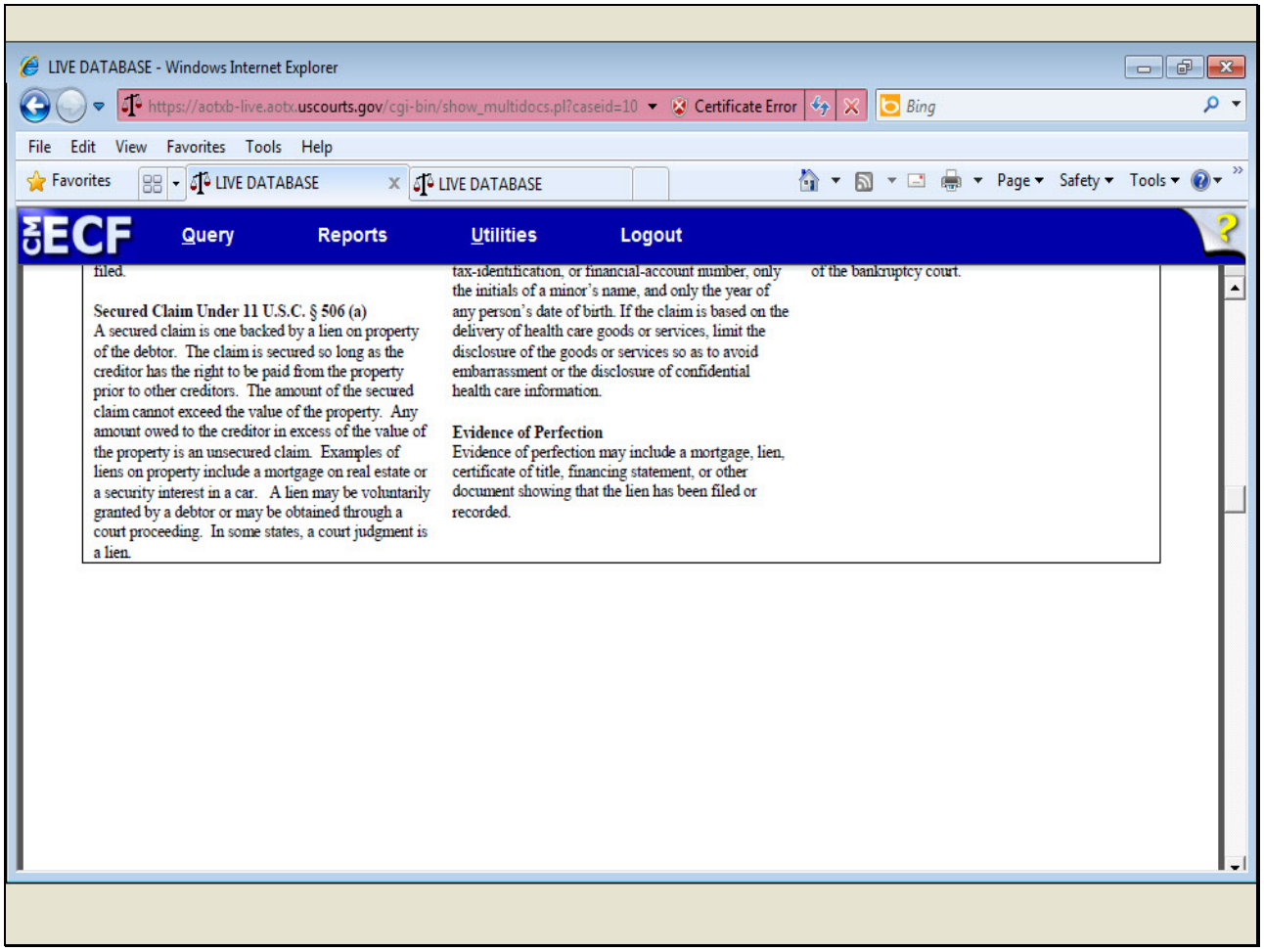
Slide notes

Slide 33 - Slide 33



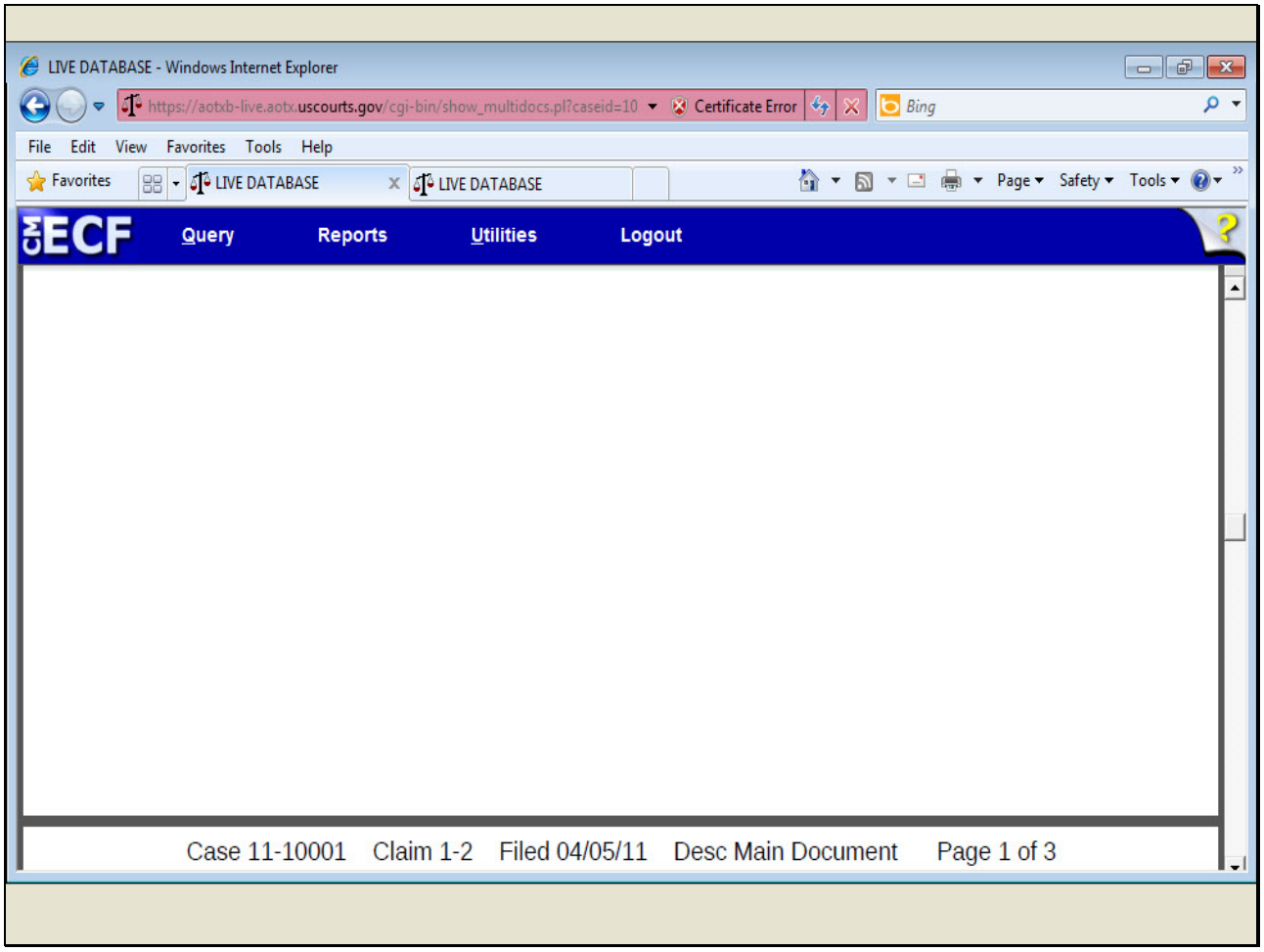
Slide notes

Slide 34 - Slide 34



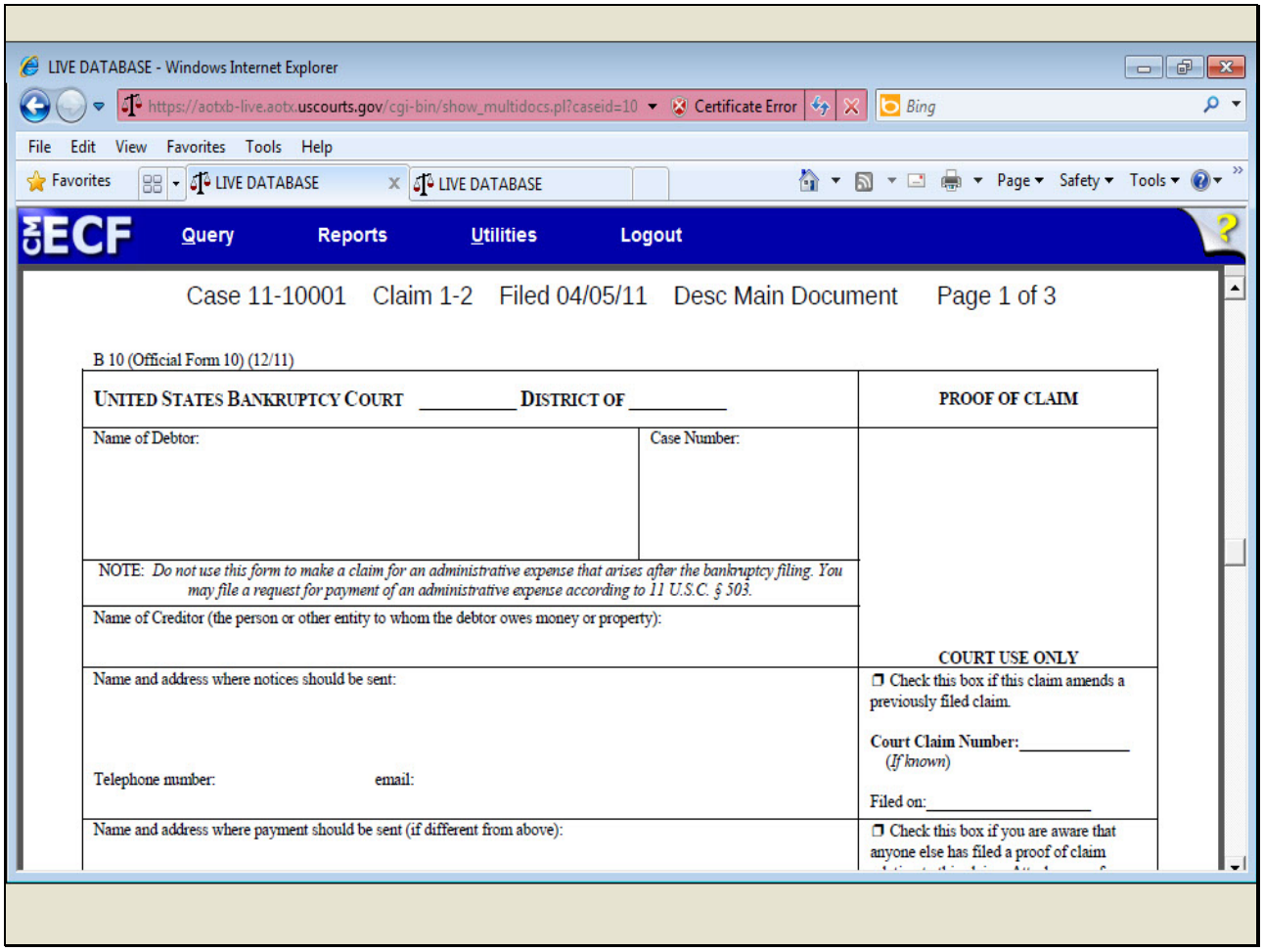
Slide notes

Slide 35 - Slide 35



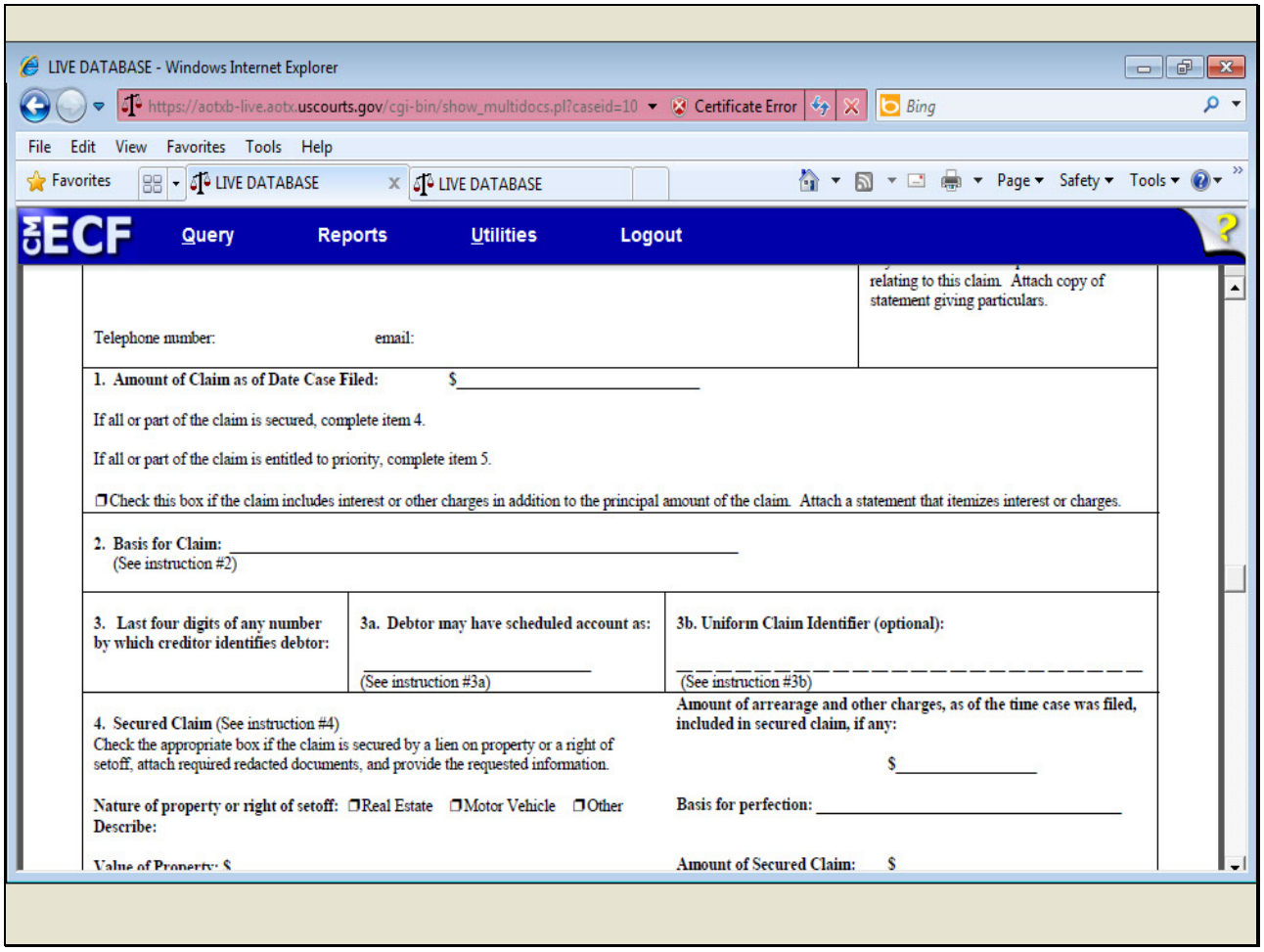
Slide notes

Slide 36 - Slide 36



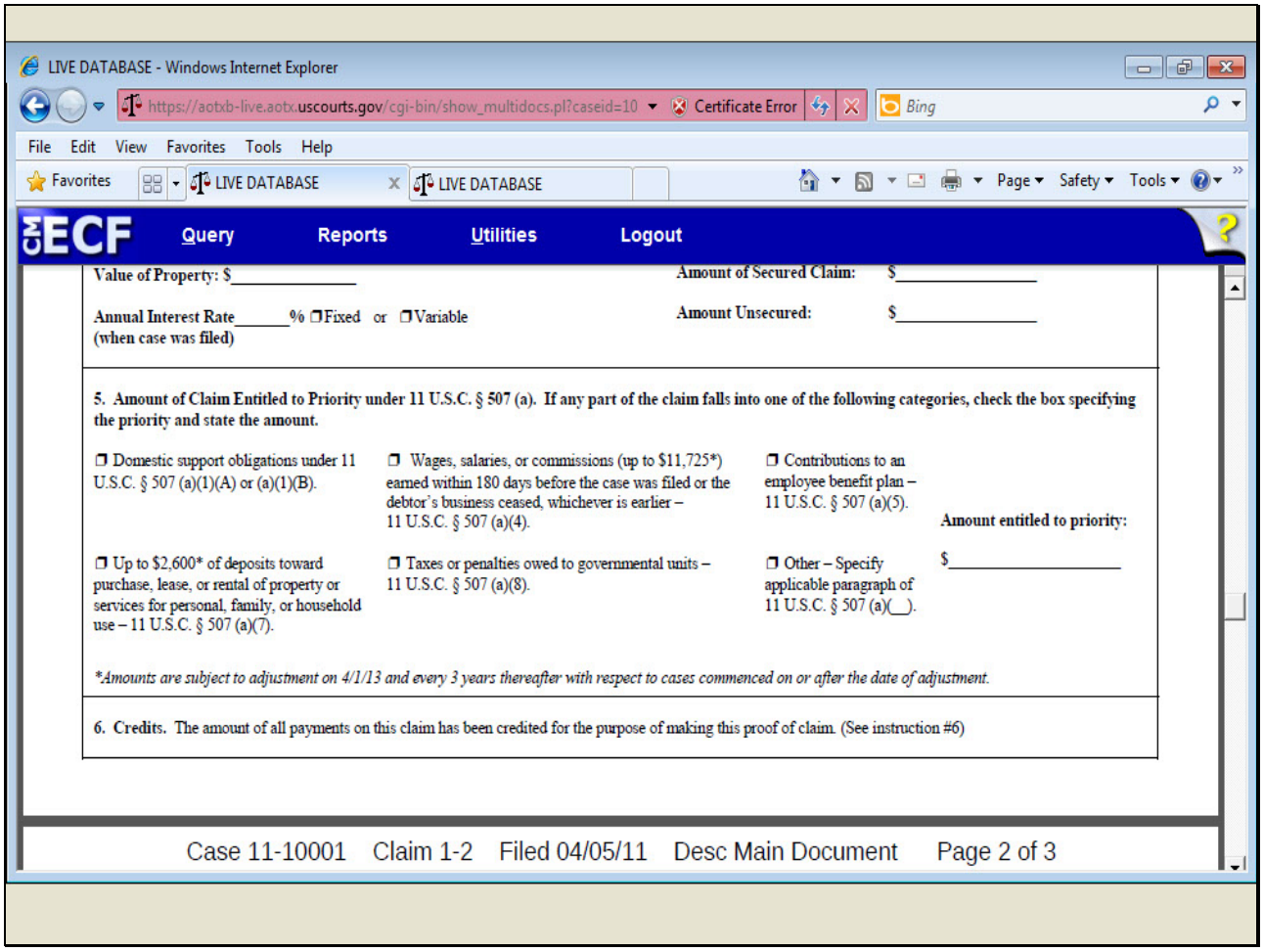
Slide notes

Slide 37 - Slide 37



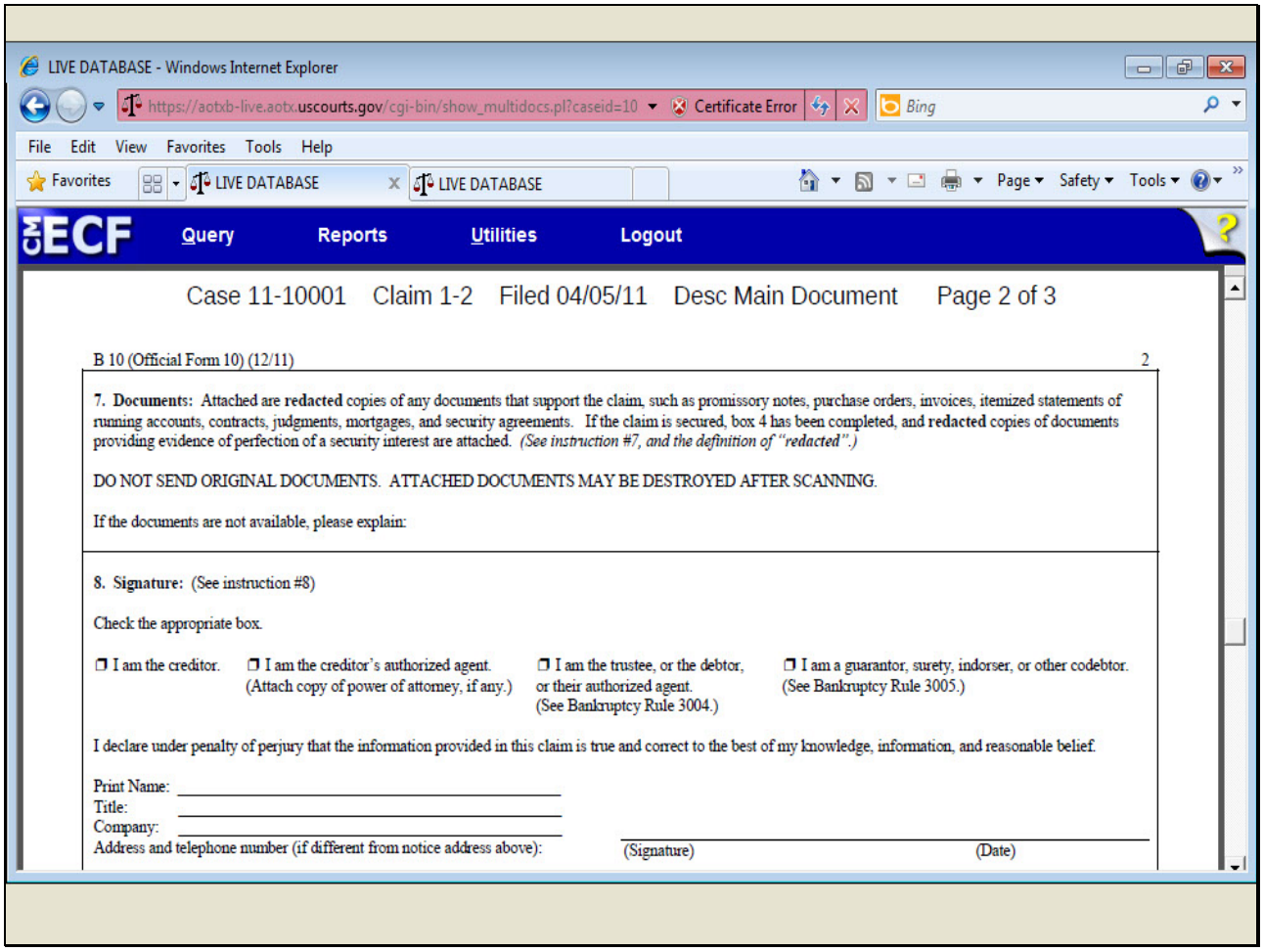
Slide notes

Slide 38 - Slide 38



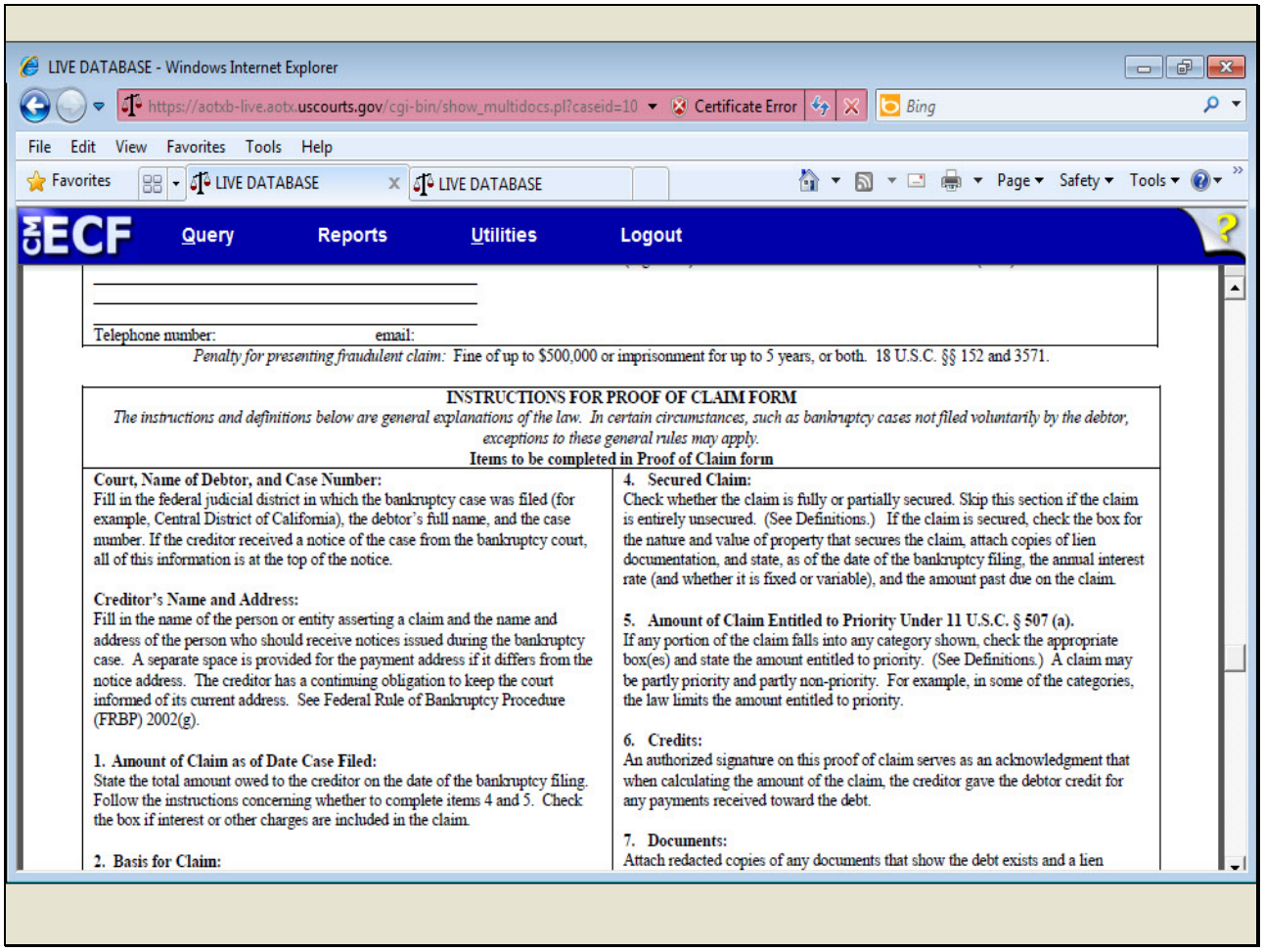
Slide notes

Slide 39 - Slide 39



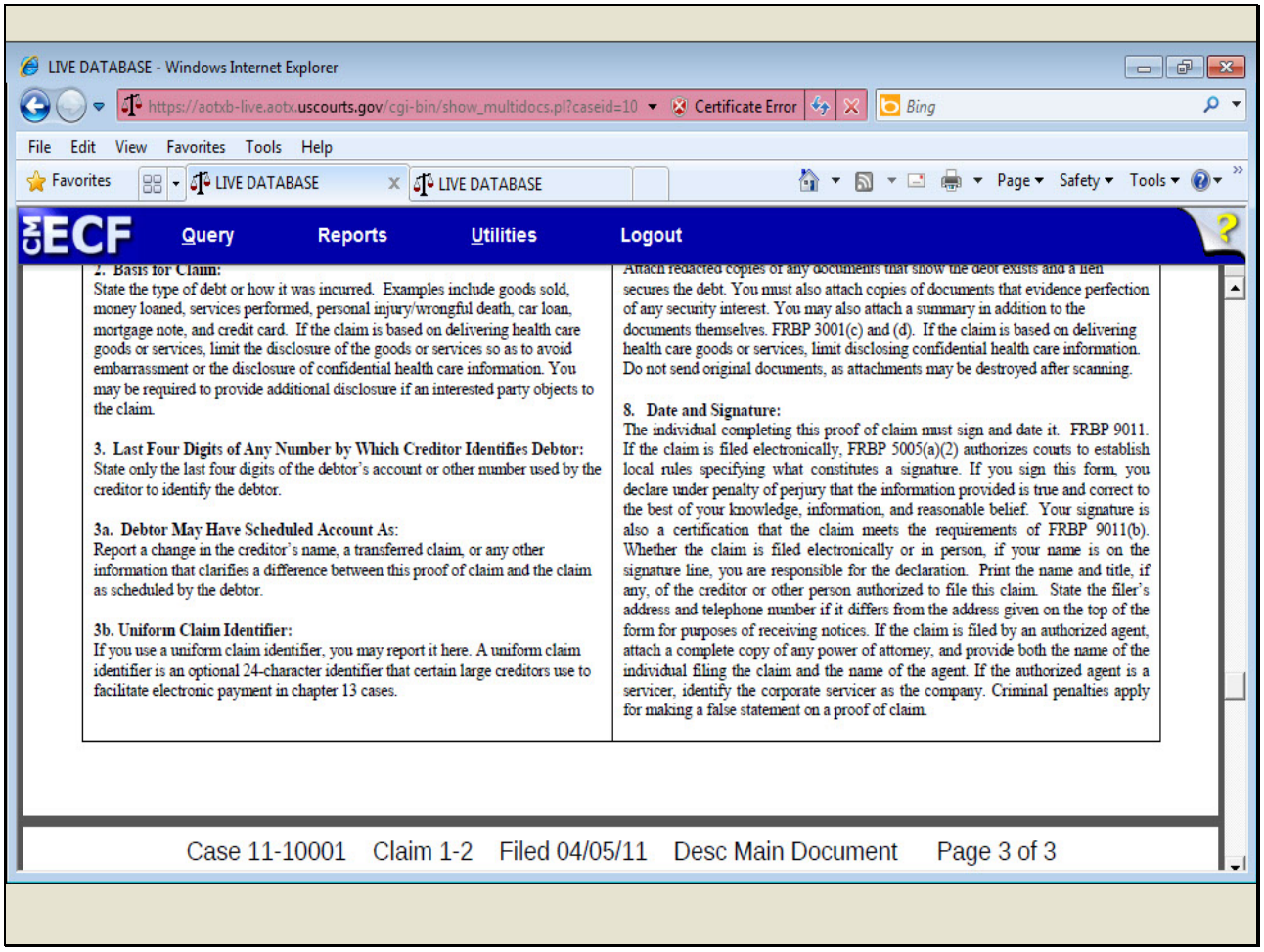
Slide notes

Slide 40 - Slide 40



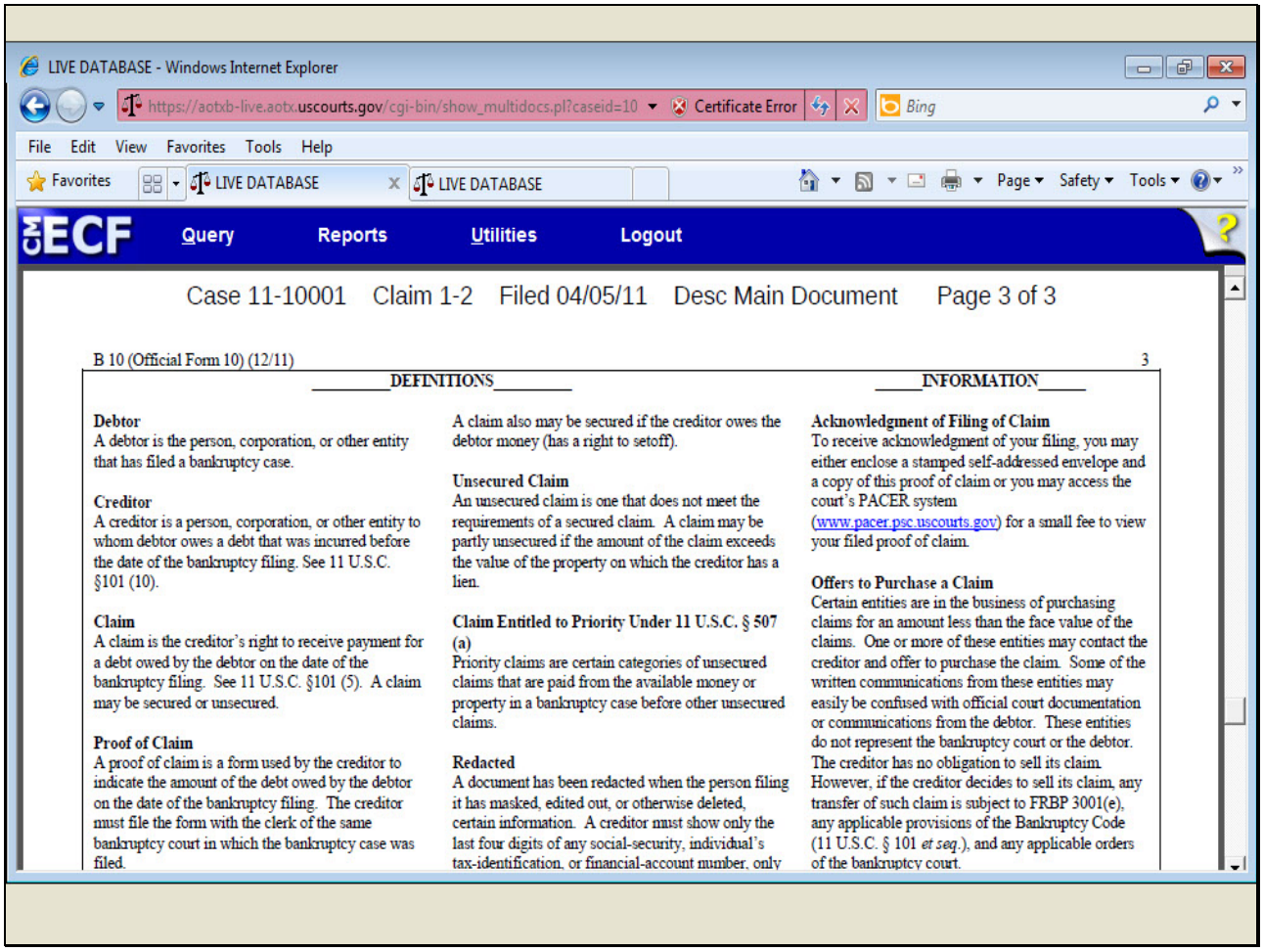
Slide notes

Slide 41 - Slide 41



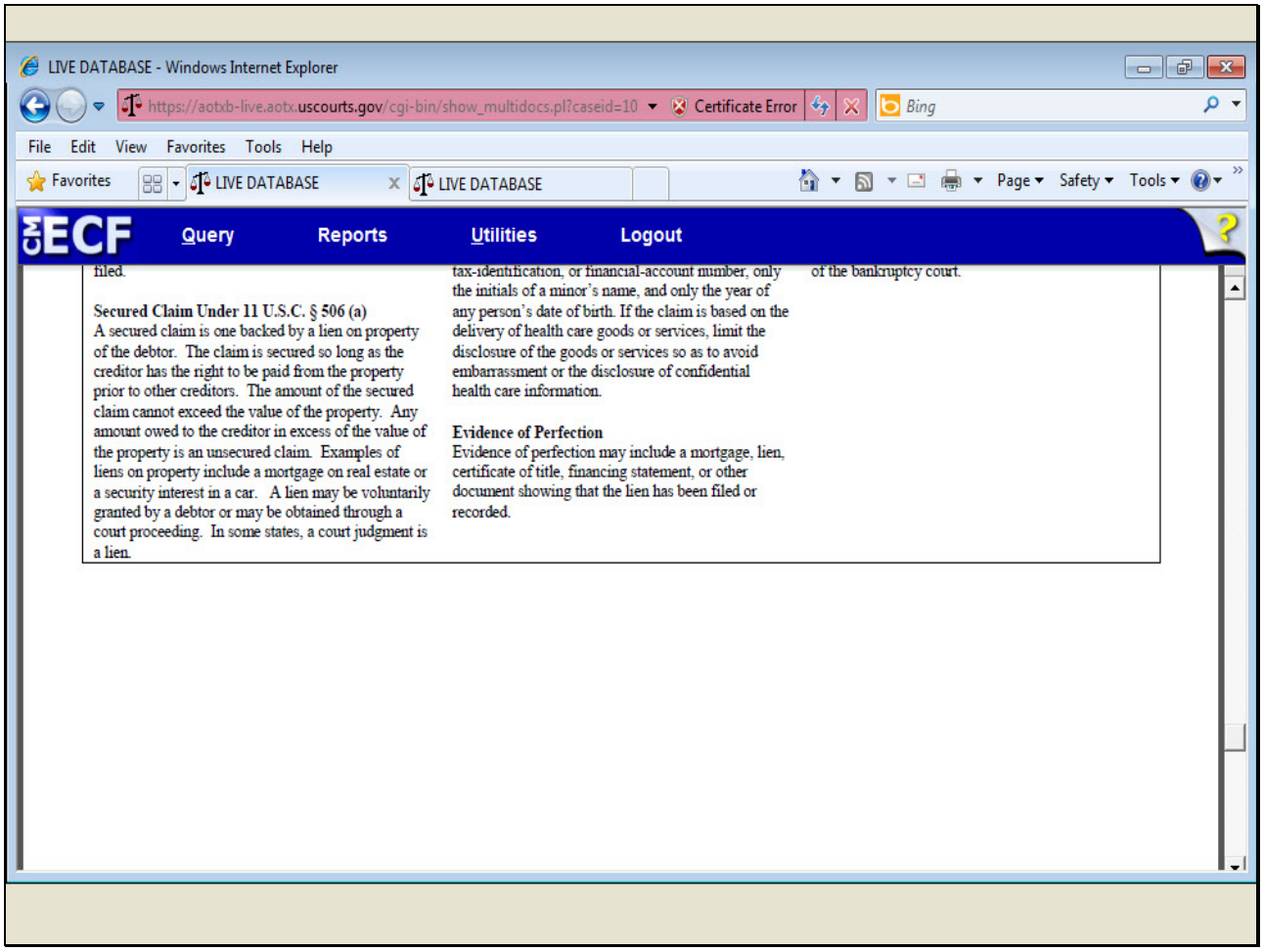
Slide notes

Slide 42 - Slide 42



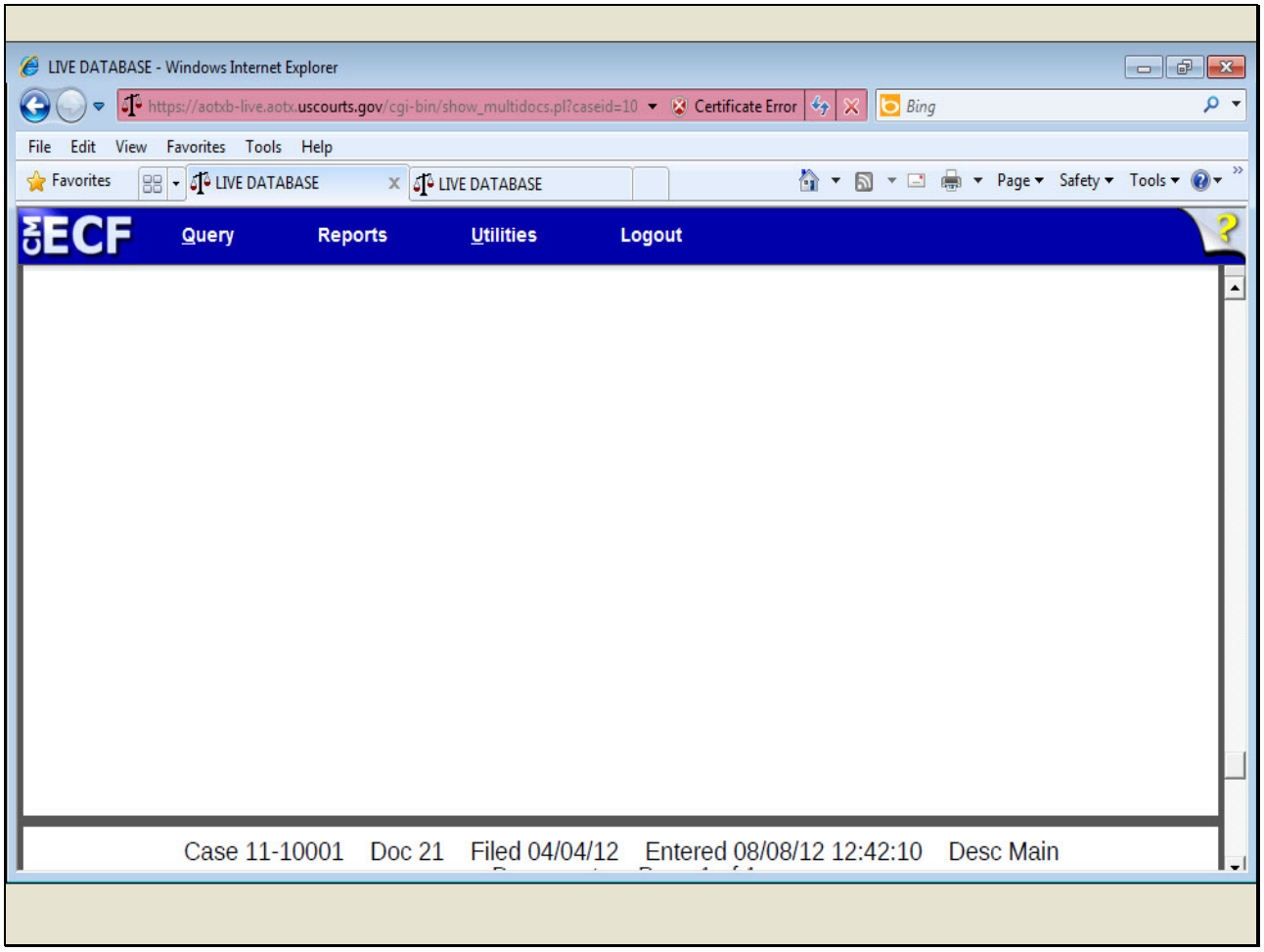
Slide notes

Slide 43 - Slide 43



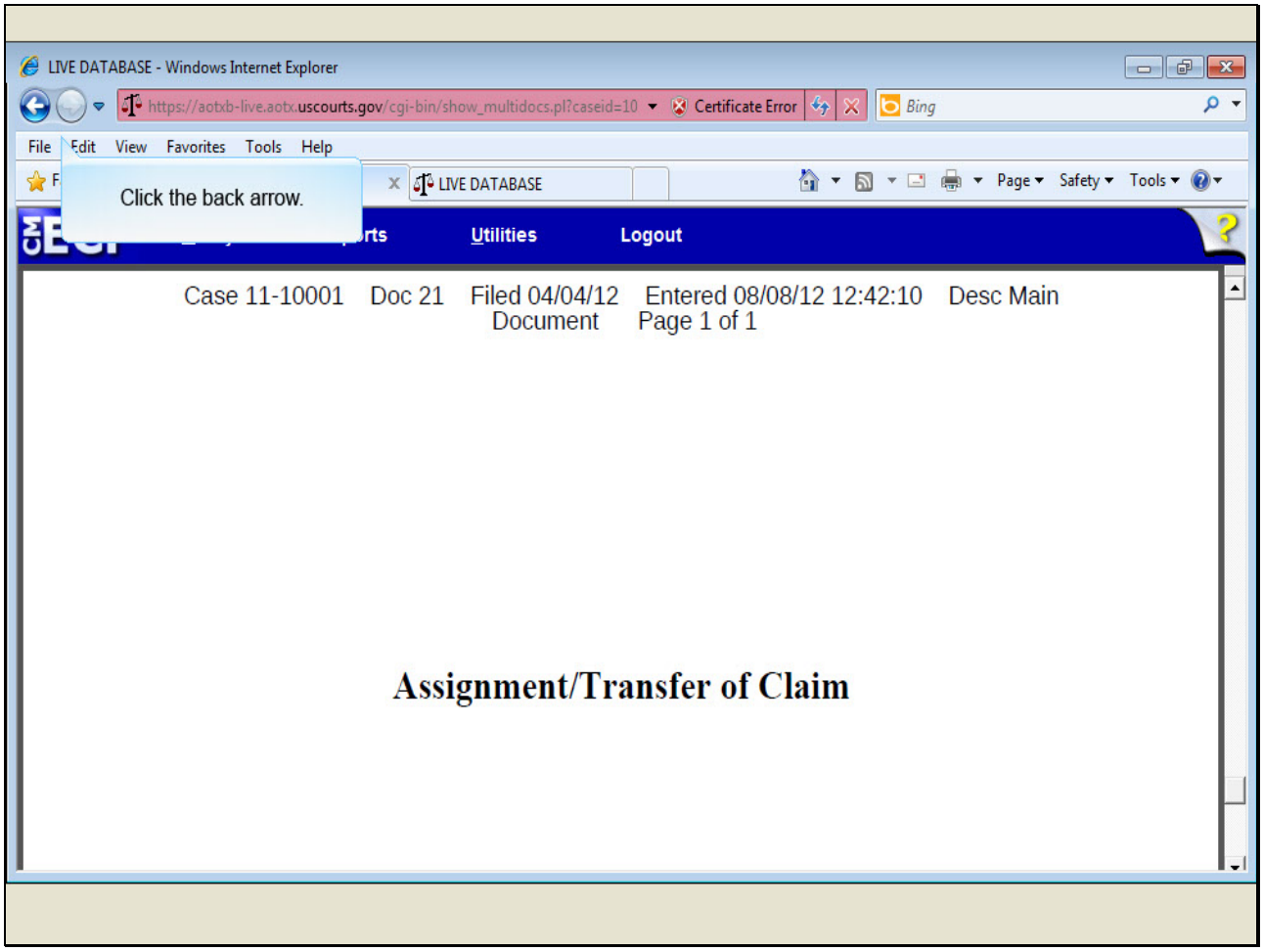
Slide notes

Slide 44 - Slide 44



Slide notes

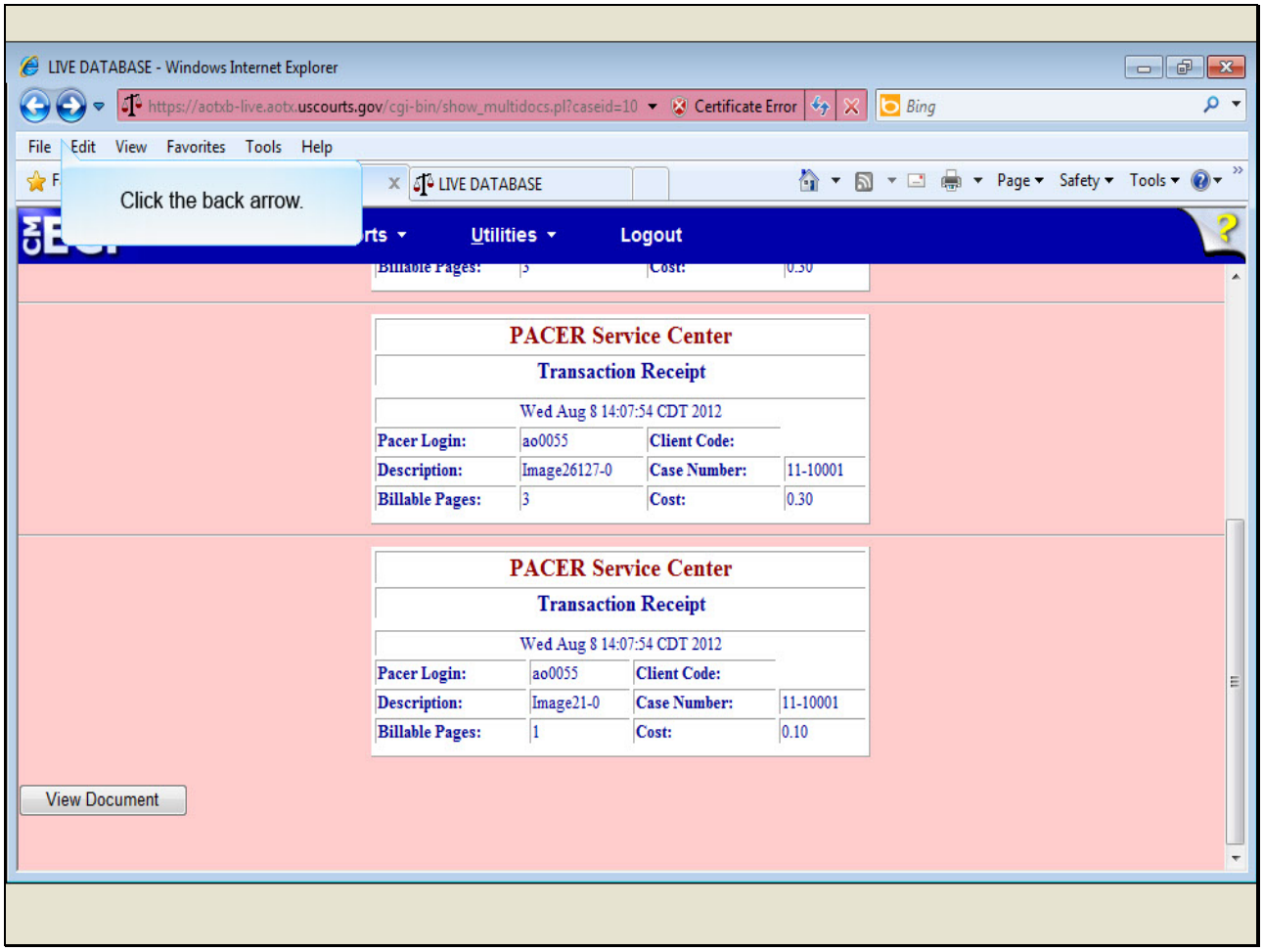
Slide 45 - Slide 45



Slide notes

To return to the Claims Register confirmation screen, I'll click the back arrow.

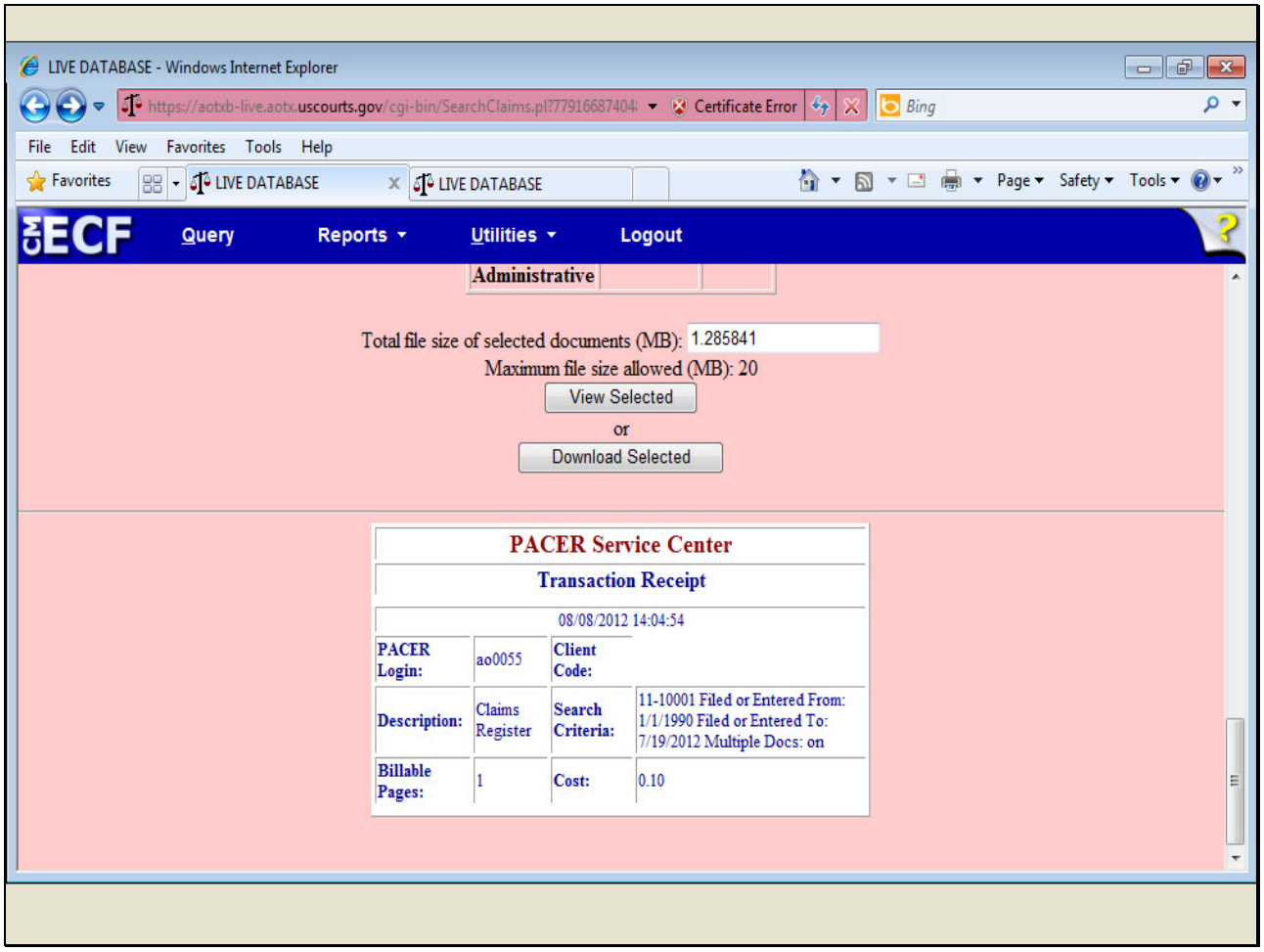
Slide 46 - Slide 46



Slide notes

I'll click the back arrow again to return to the Claims Register.

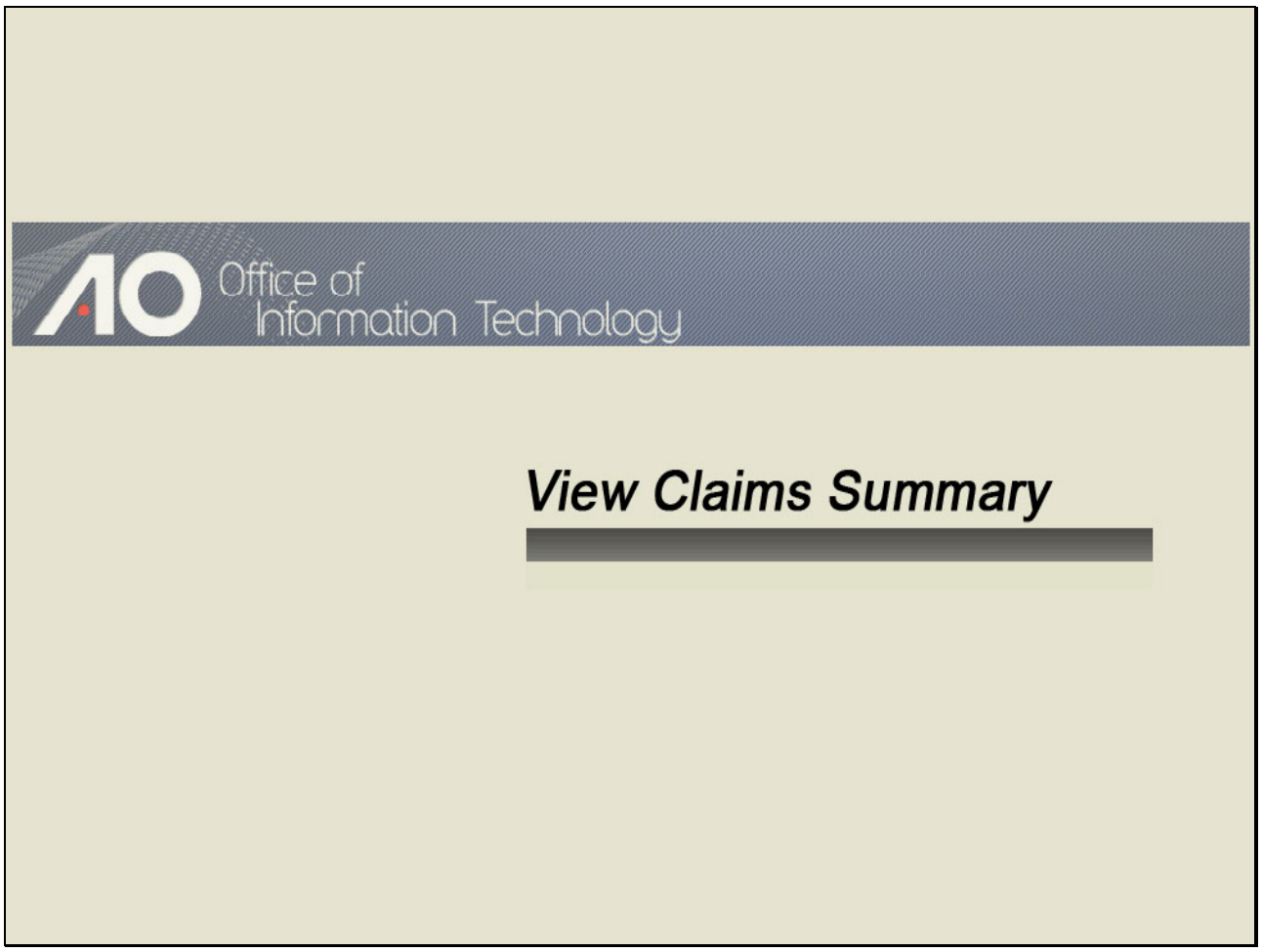
Slide 47 - Slide 47



Slide notes

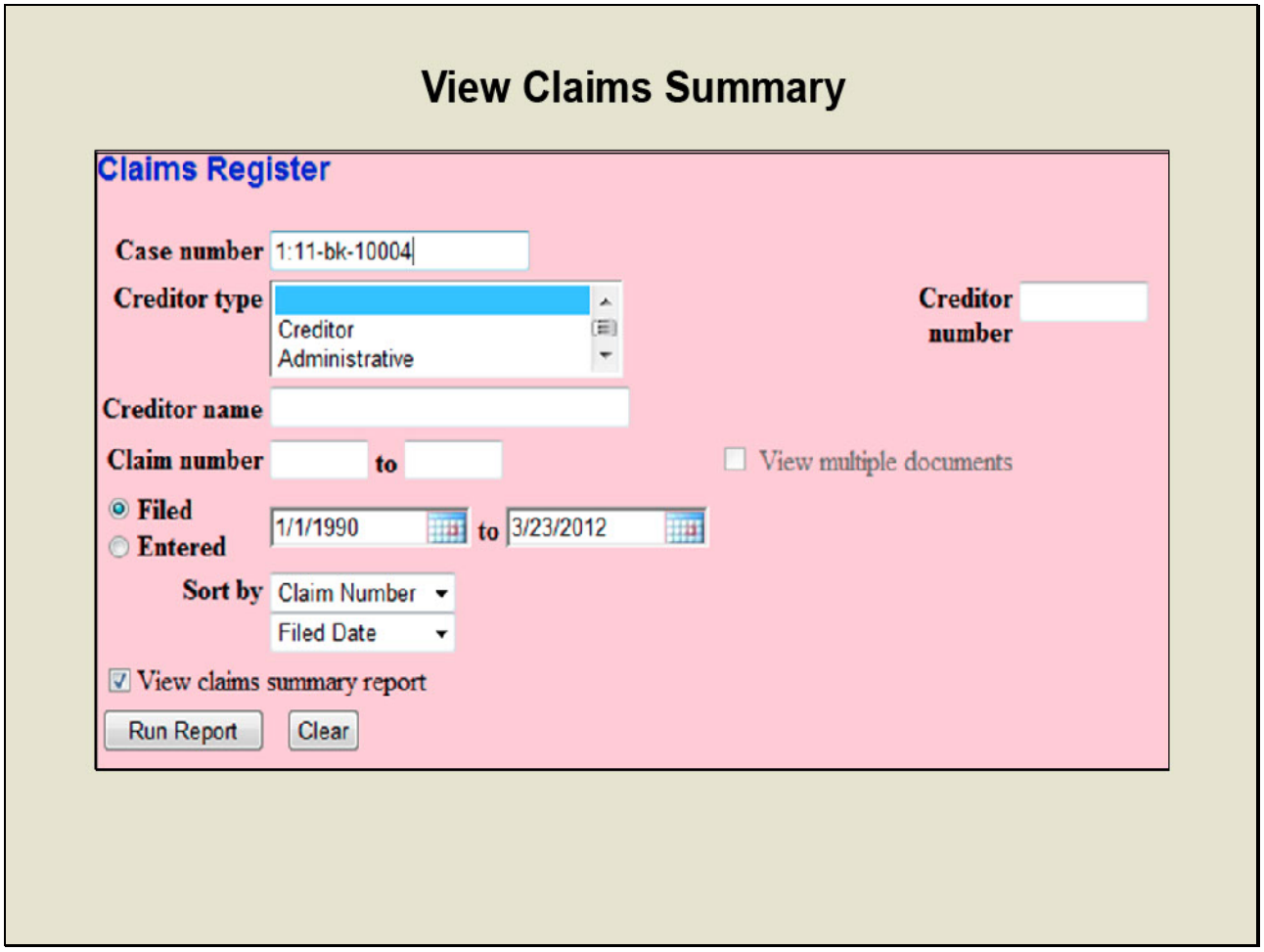
You can also download the selected documents from the Claims Register by clicking Download Selected.

Slide 48 - View Claims Summary



Slide notes

Slide 49 - Slide 49

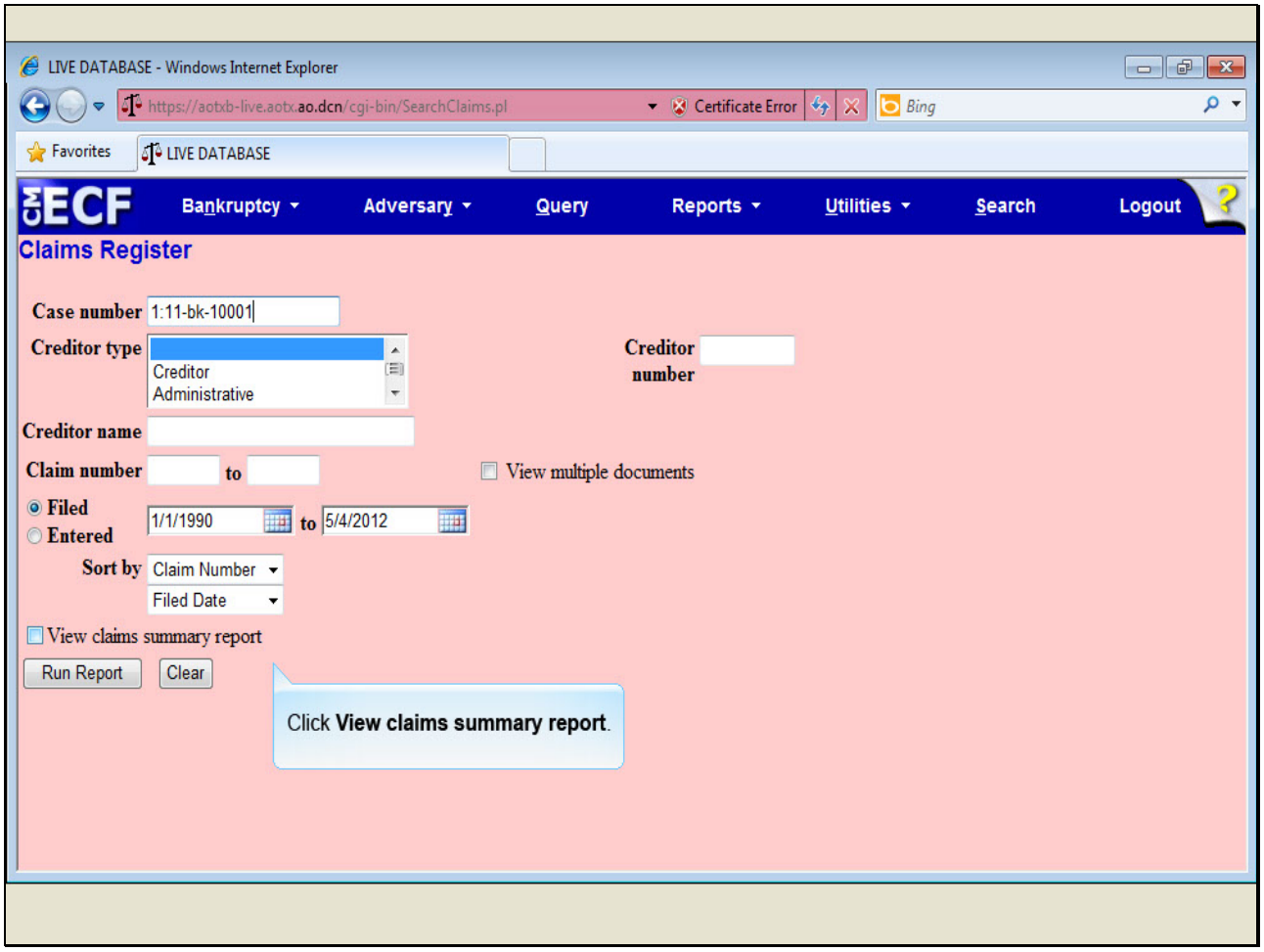


Slide notes

In addition to viewing multiple documents, a claims register summary report is now available to PACER users. This option condenses all claims on the case to a simplified list.

The familiar selection fields are available to produce a partial summary by creditor, claim number, or date range. So a claims summary of the entire claims register can be produced or you may generate a partial summary based on your needs.

Slide 50 - Slide 50

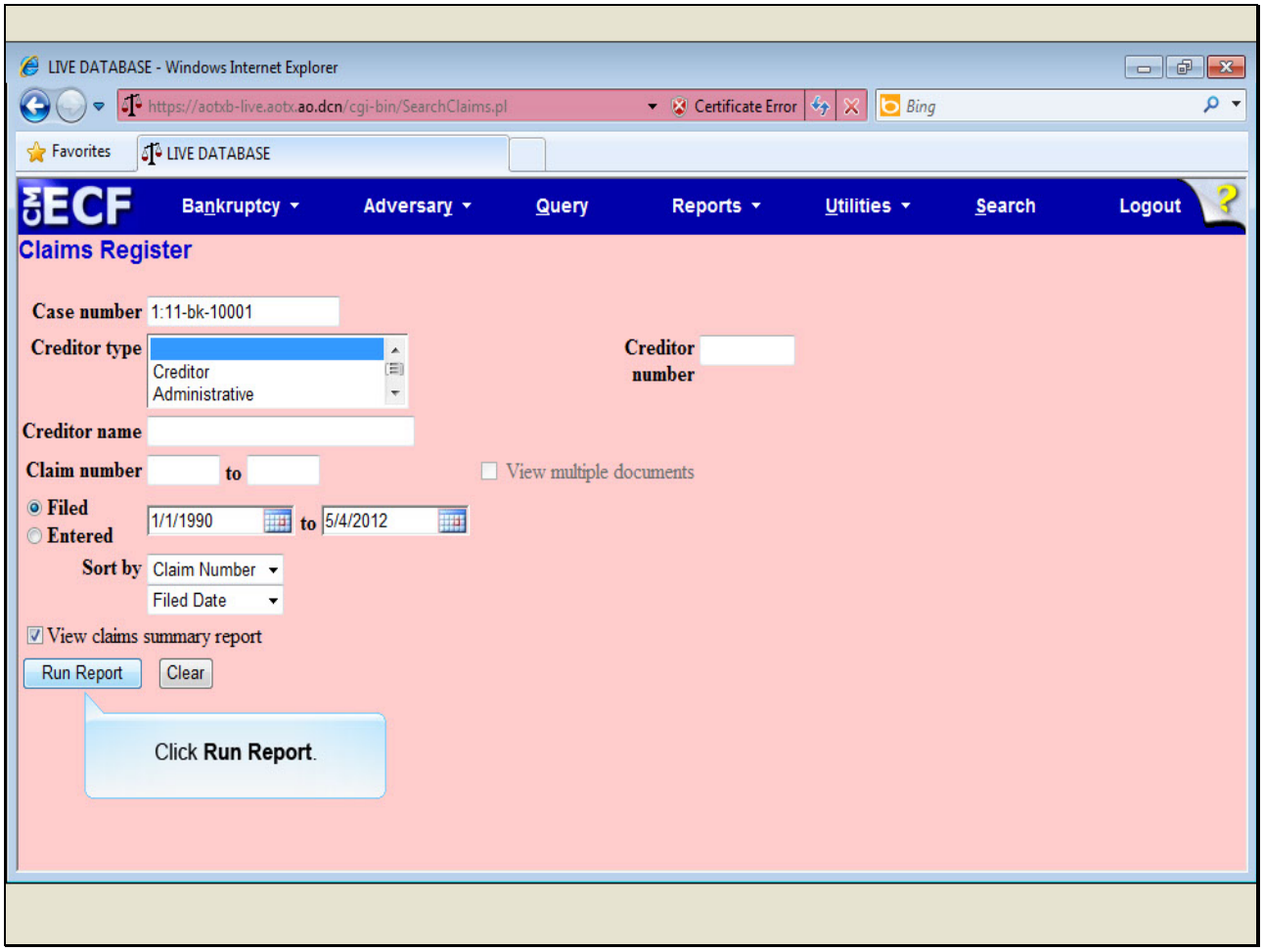


Slide notes

To generate a claims summary report, we'll return to the Claims Register screen. In this example, the case number is already populated.

Remember, you can generate a partial report for specific claims of interest to you by first filtering the data by creditor name, claim number range, or date range. I'll now click the View claims summary report check box...

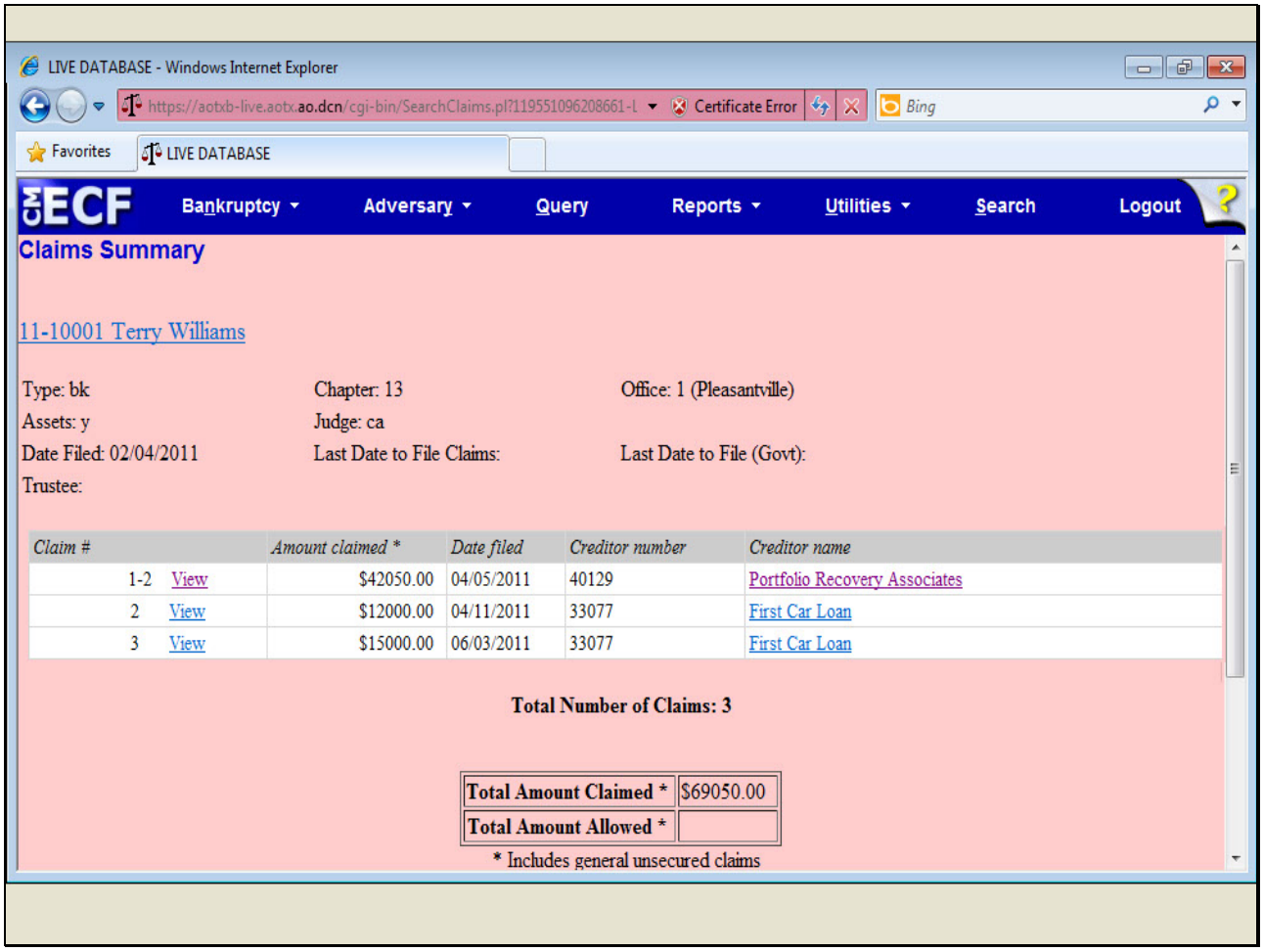
Slide 51 - Slide 51



Slide notes

...and click Run Report.

Slide 52 - Slide 52

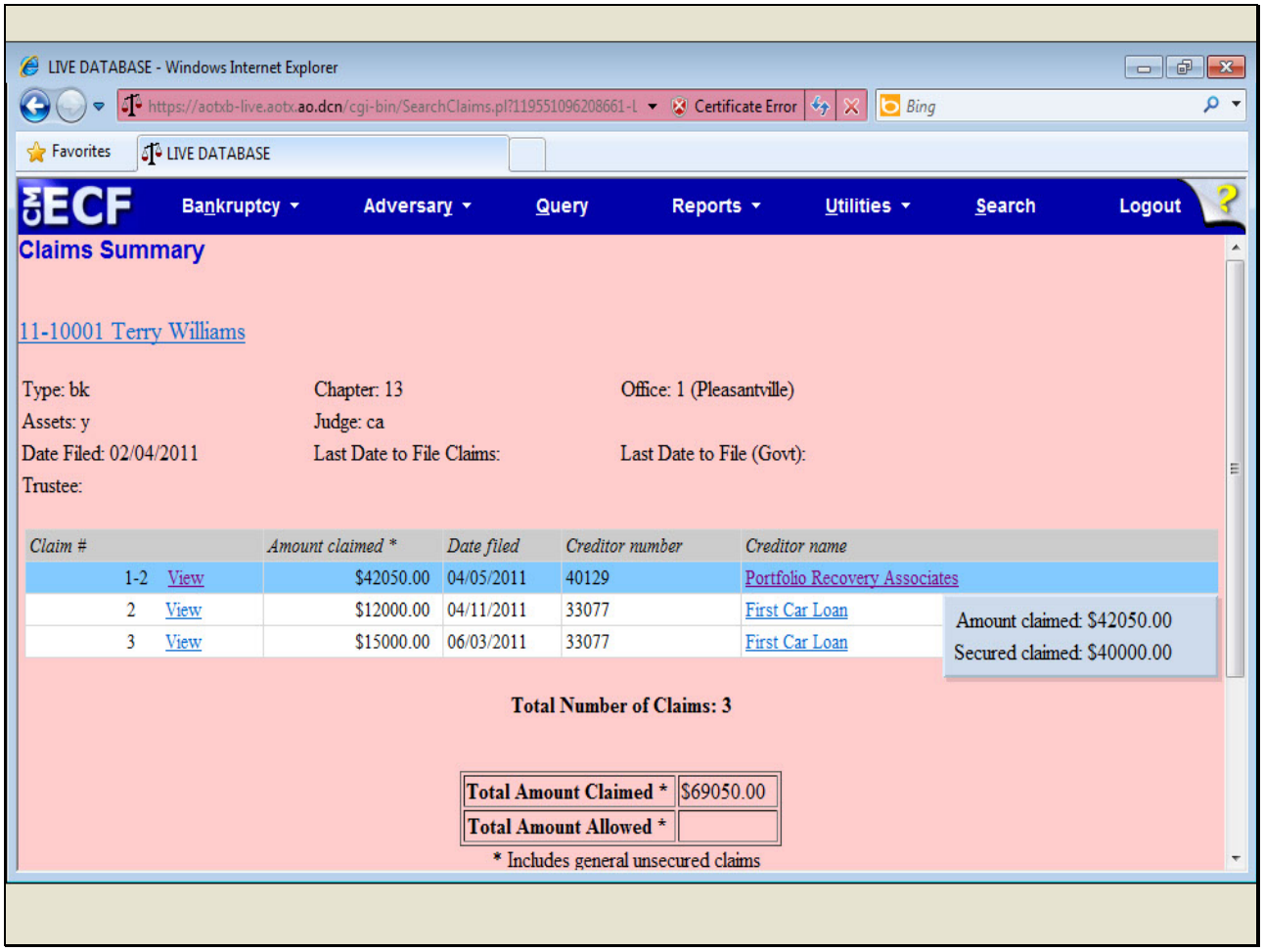


Slide notes

Here's an example of the claims summary report. You may sort the table by clicking the claim number, date filed, or creditor name by clicking the column header. With this new feature, you can easily view a simple list of selected claims or all claims.

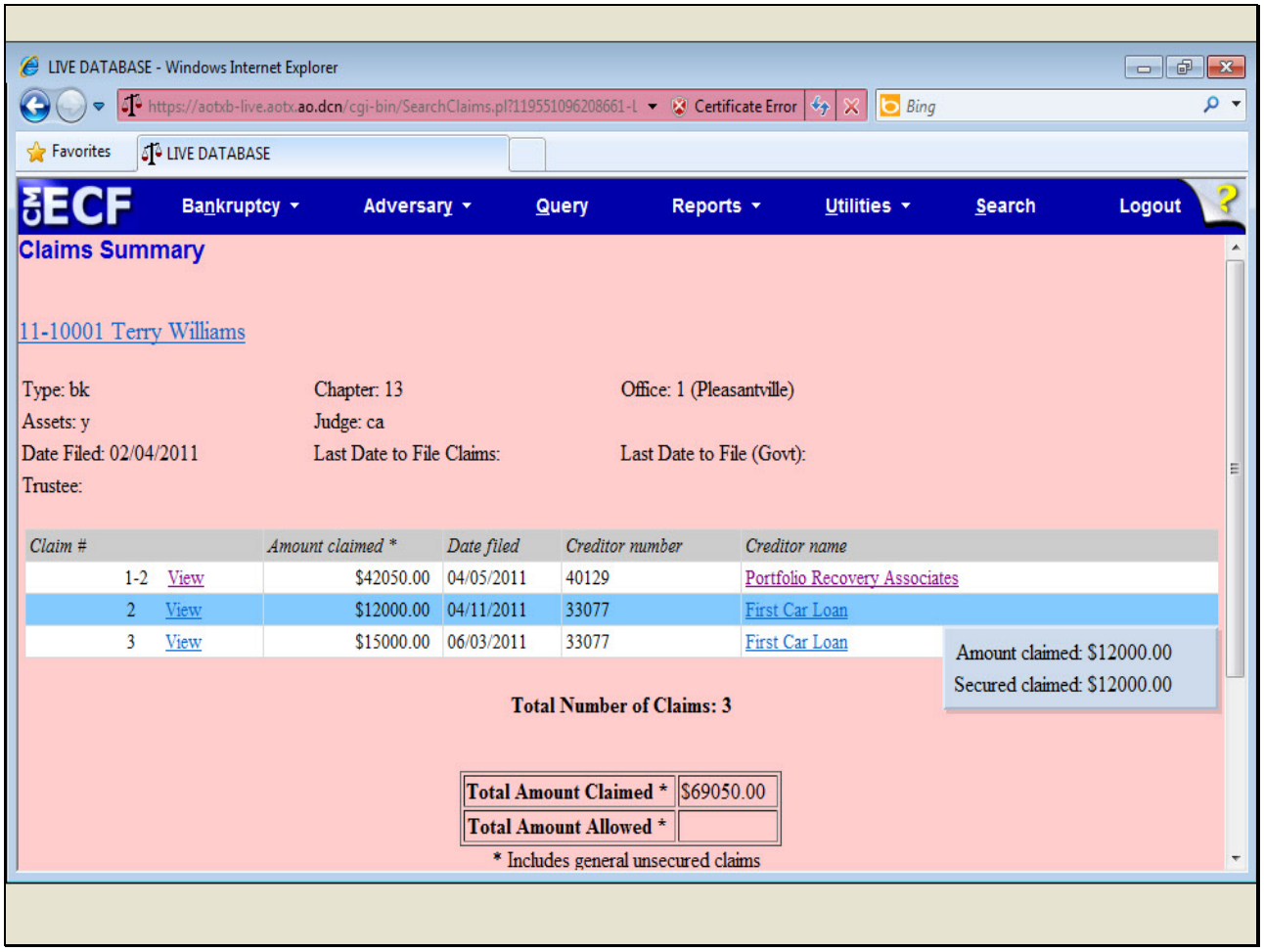
Also notice that resting on the amount claimed for each claim will display a breakdown of the claim amounts.

Slide 53 - Slide 53



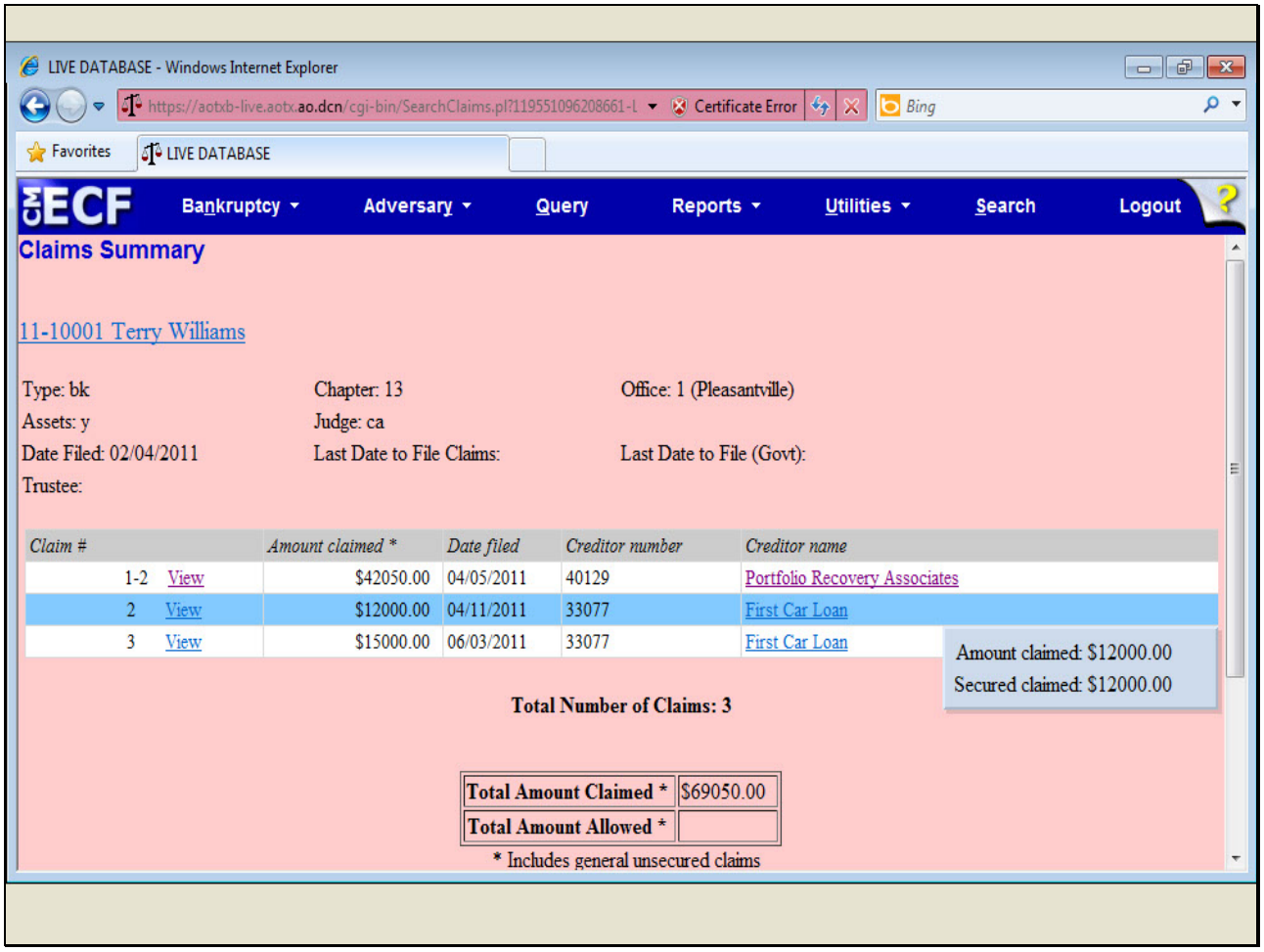
Slide notes

Slide 54 - Slide 54



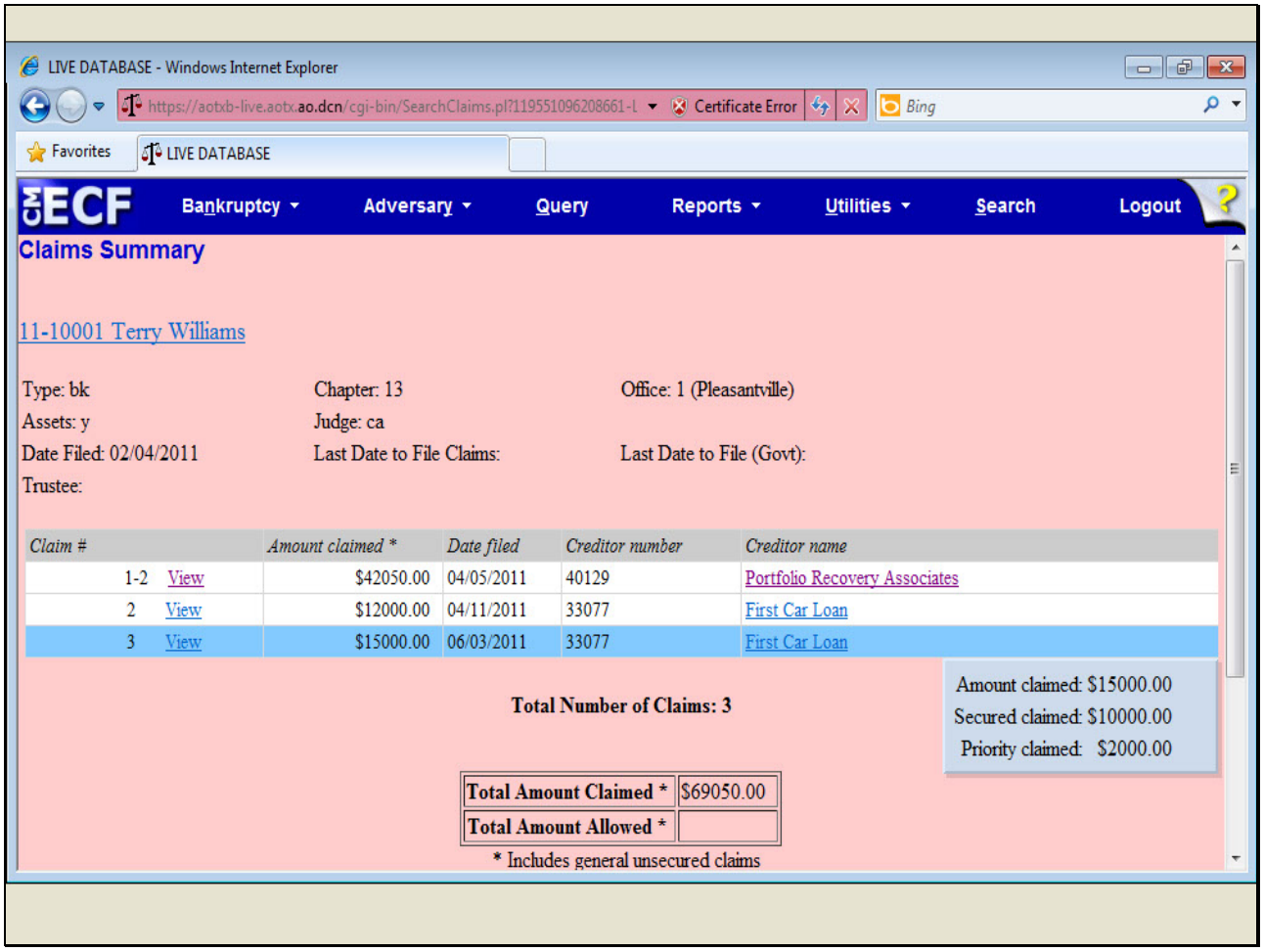
Slide notes

Slide 55 - Slide 55



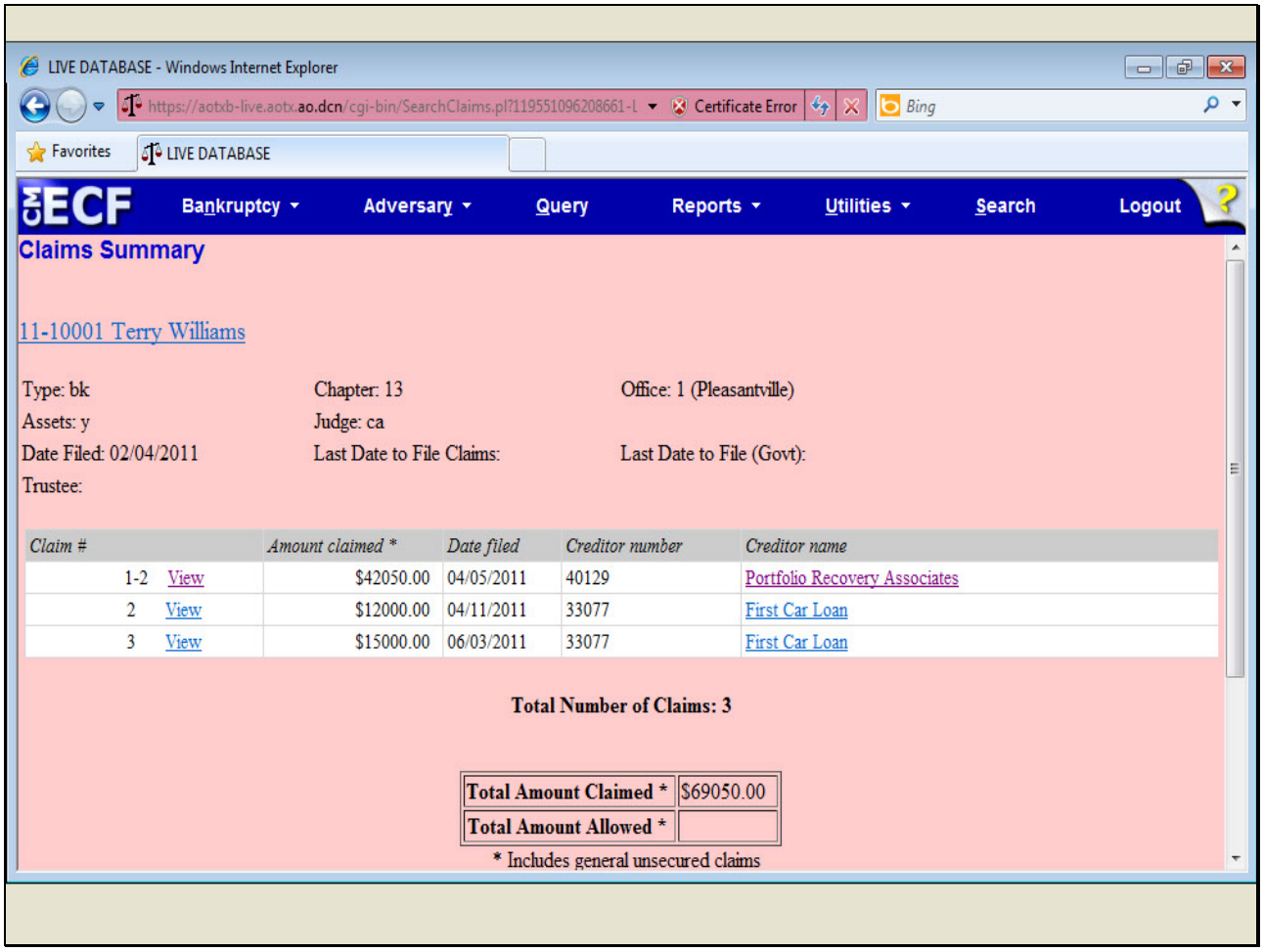
Slide notes

Slide 56 - Slide 56



Slide notes

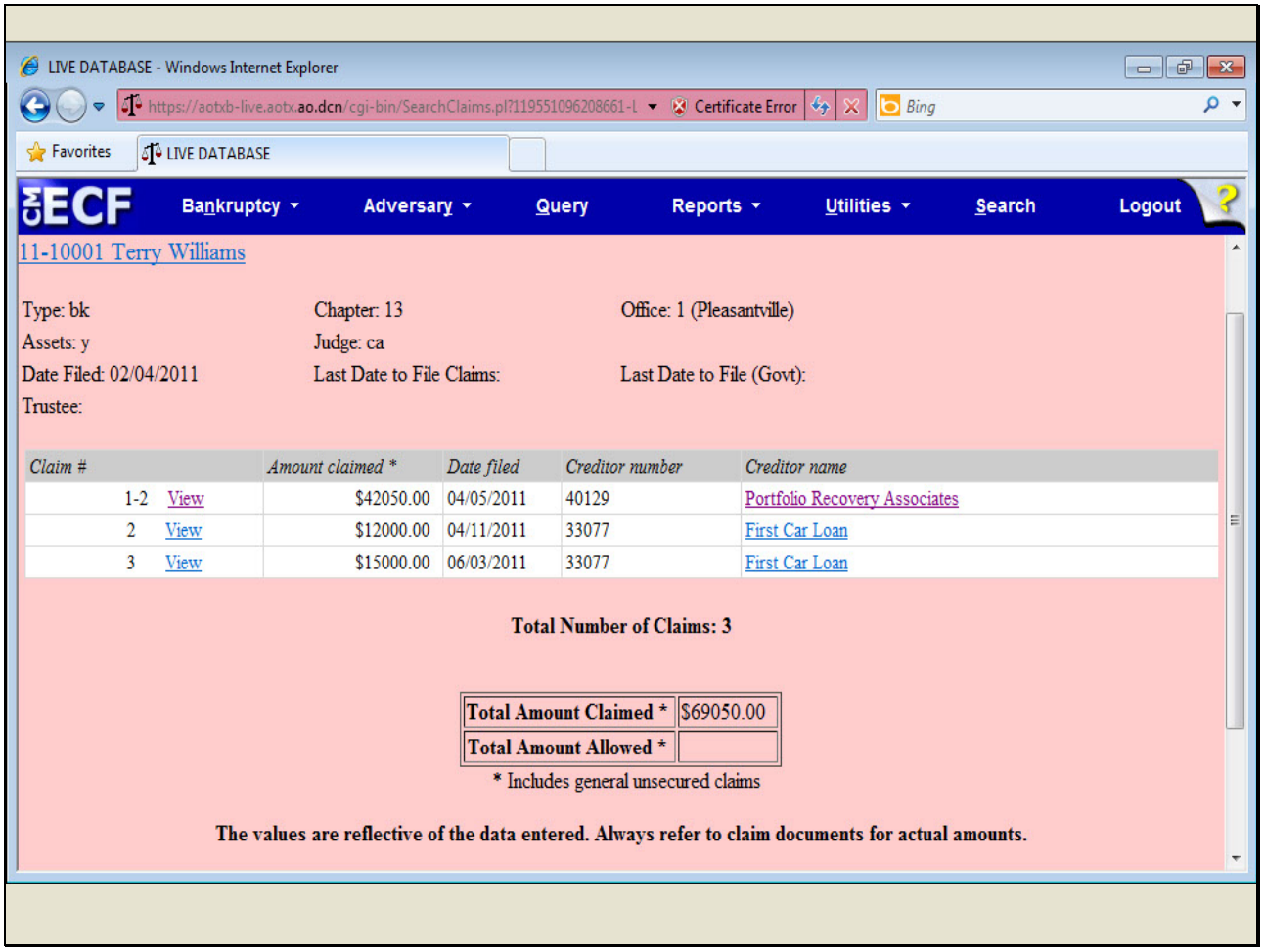
Slide 57 - Slide 57



Slide notes

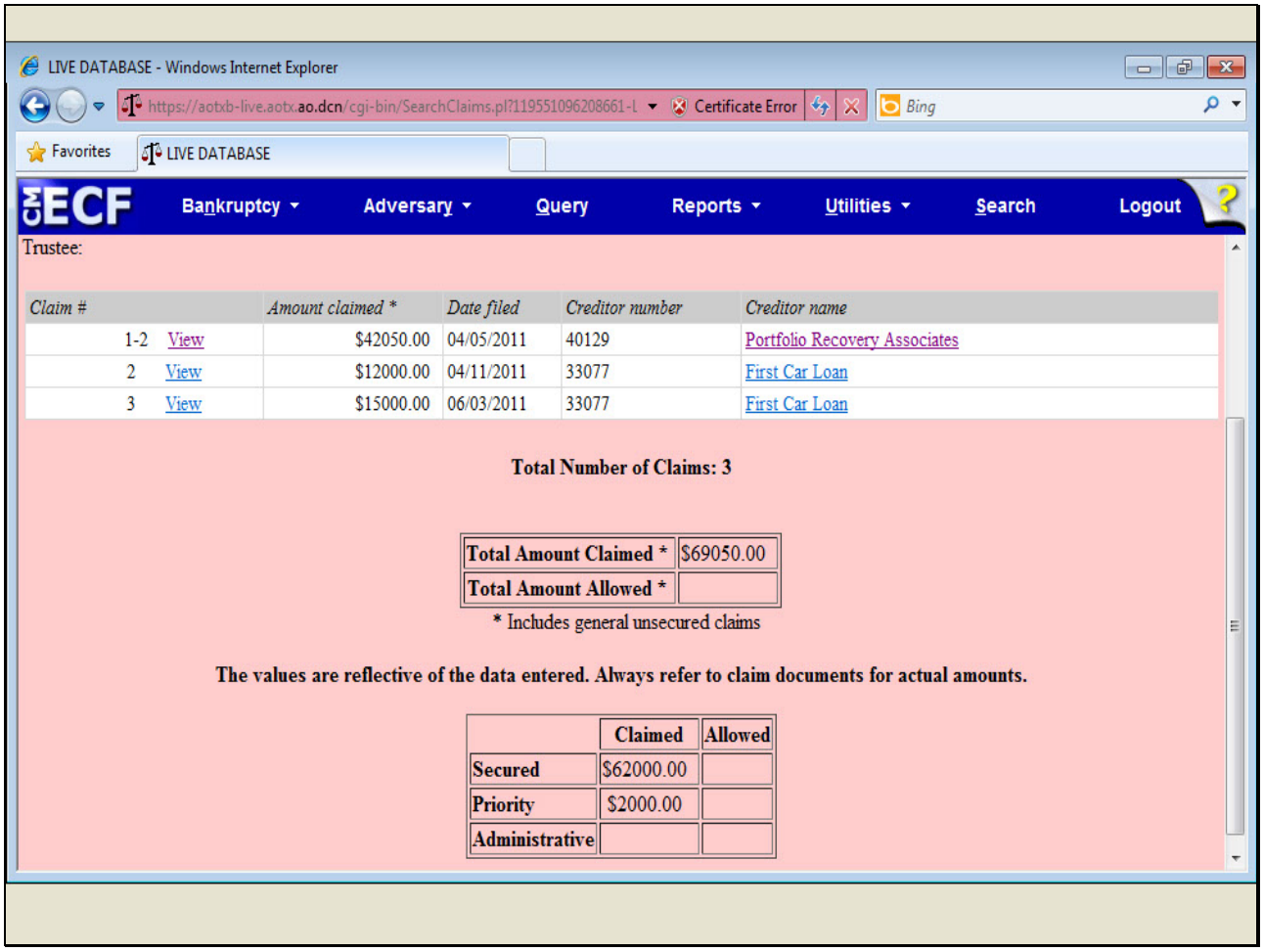
I'll scroll down to view the rest of the Claims Summary.

Slide 58 - Slide 58



Slide notes

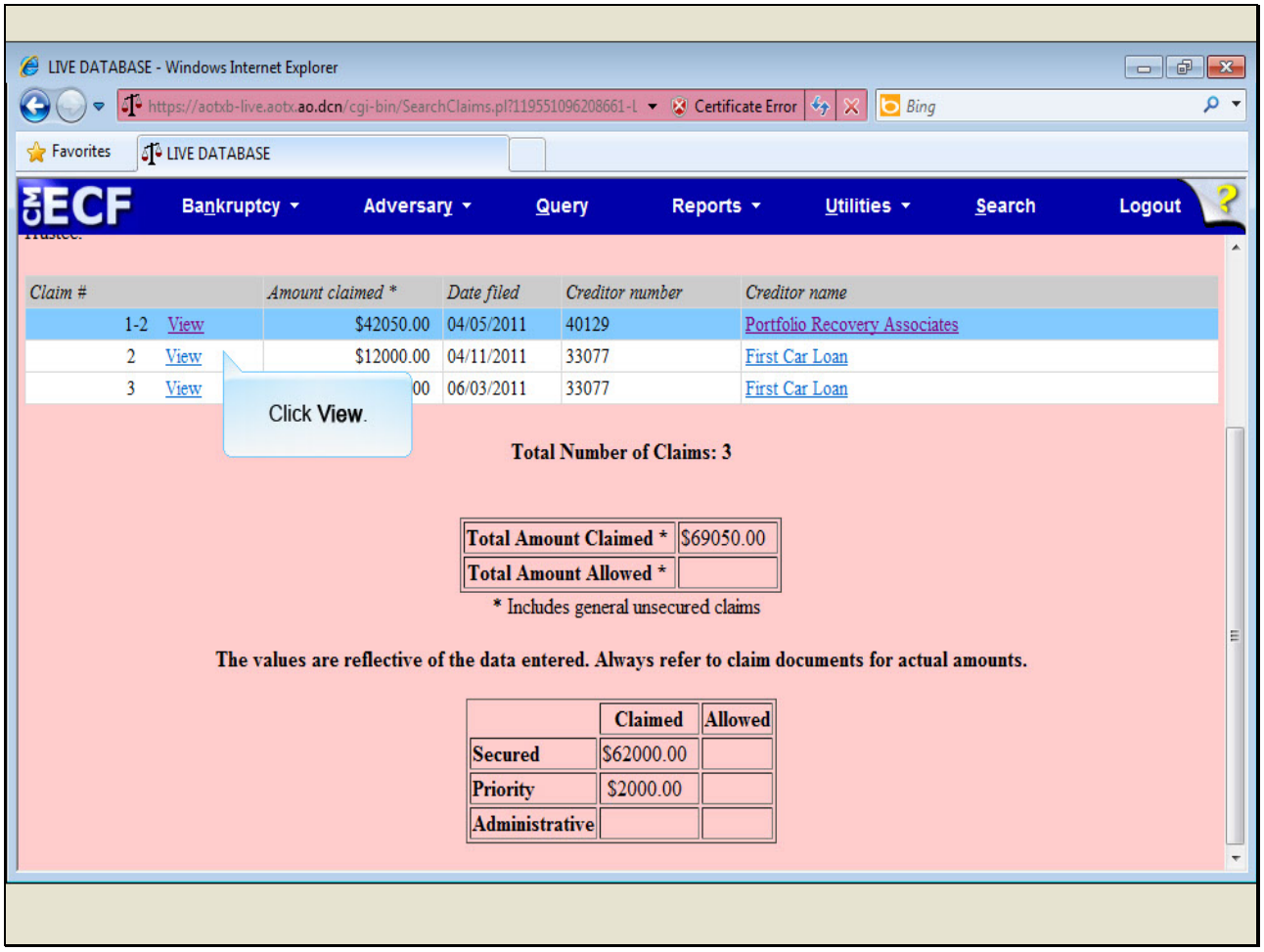
Slide 59 - Slide 59



Slide notes

The bottom of the Claims Summary lists the total number of claims, the total amount claimed, and a breakdown of the claim.

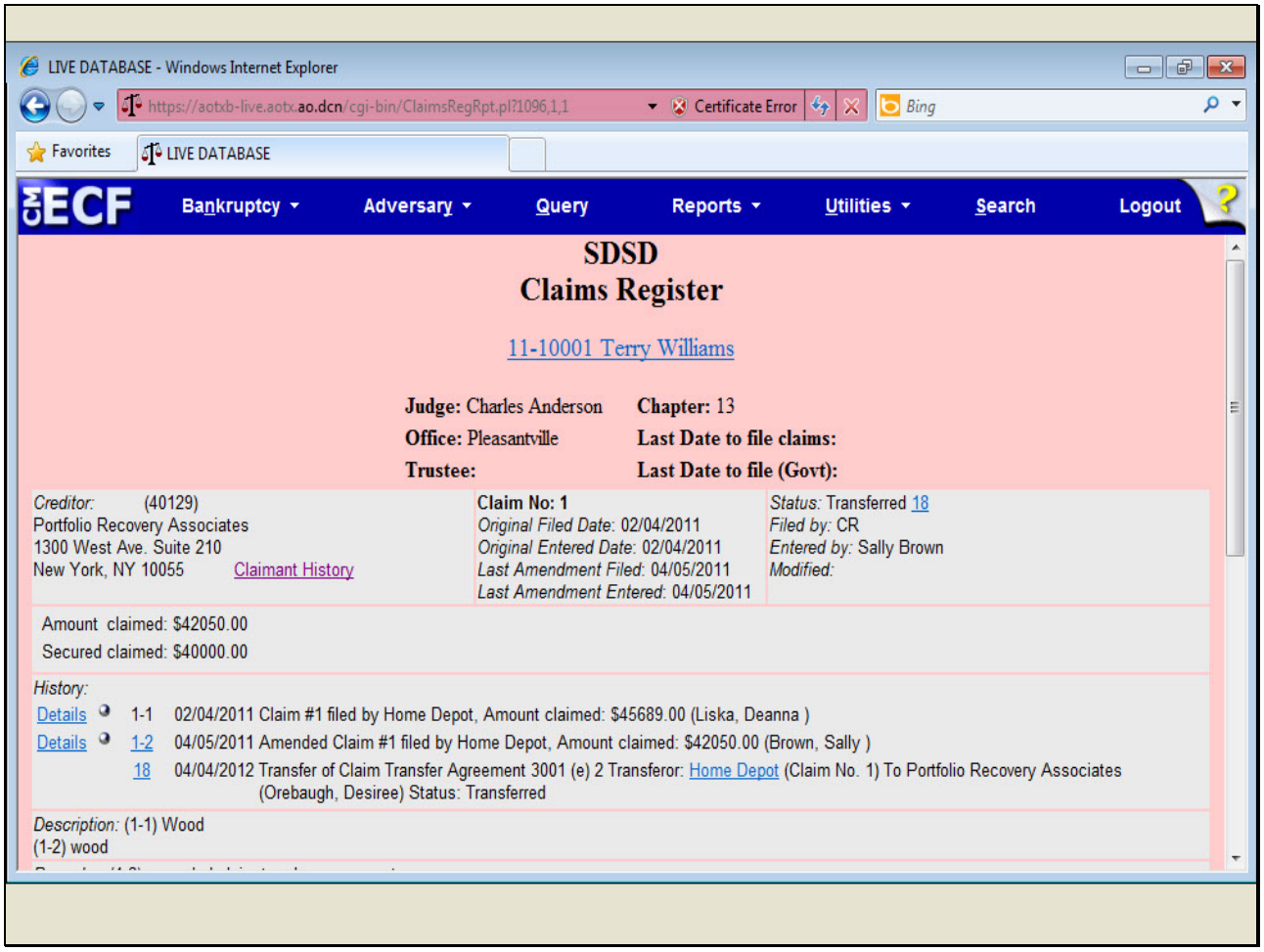
Slide 60 - Slide 60



Slide notes

To view individual claim information, click View.

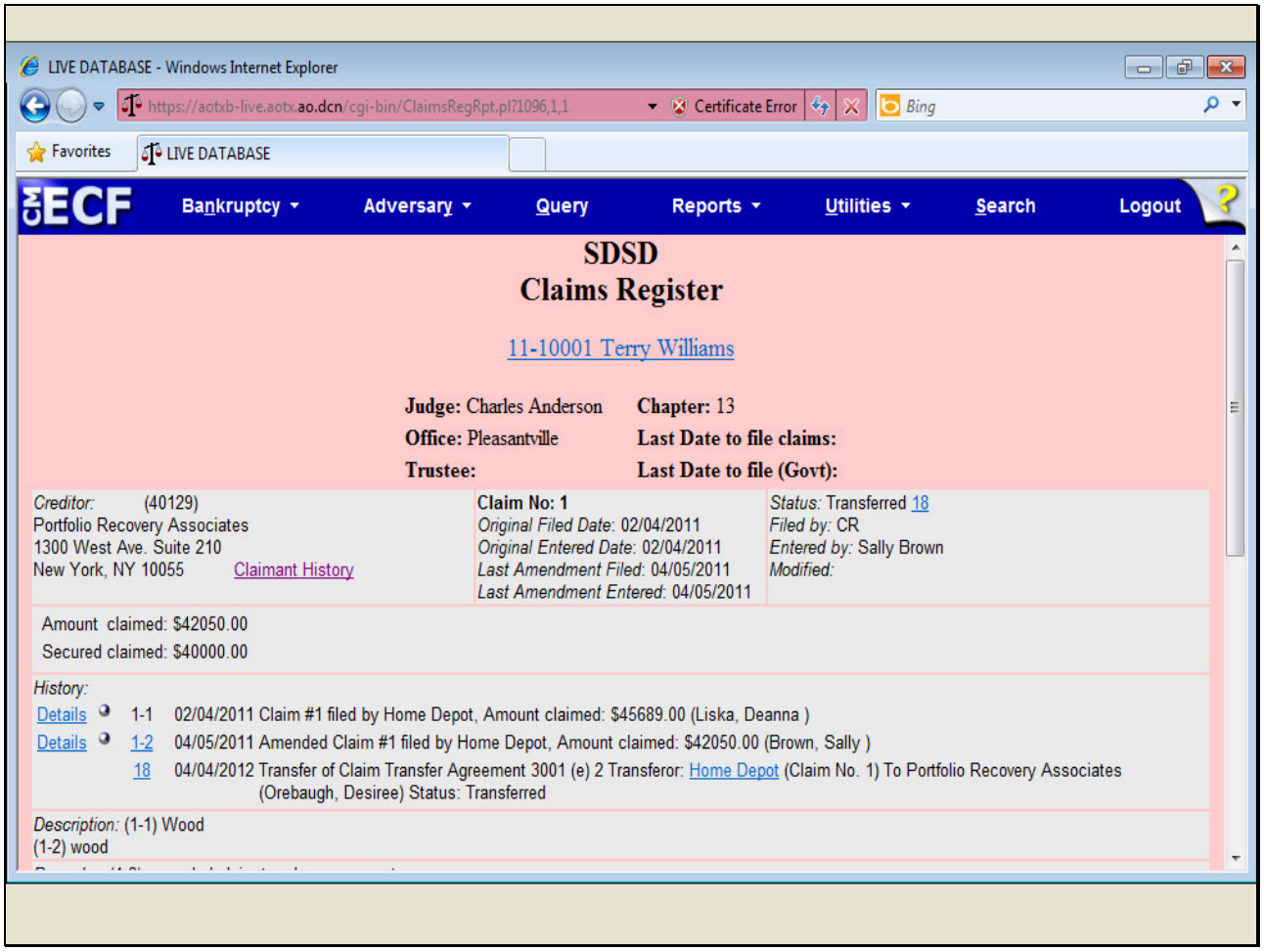
Slide 61 - Slide 61



Slide notes

The Claims Register opens with more detailed information on Claim 1.

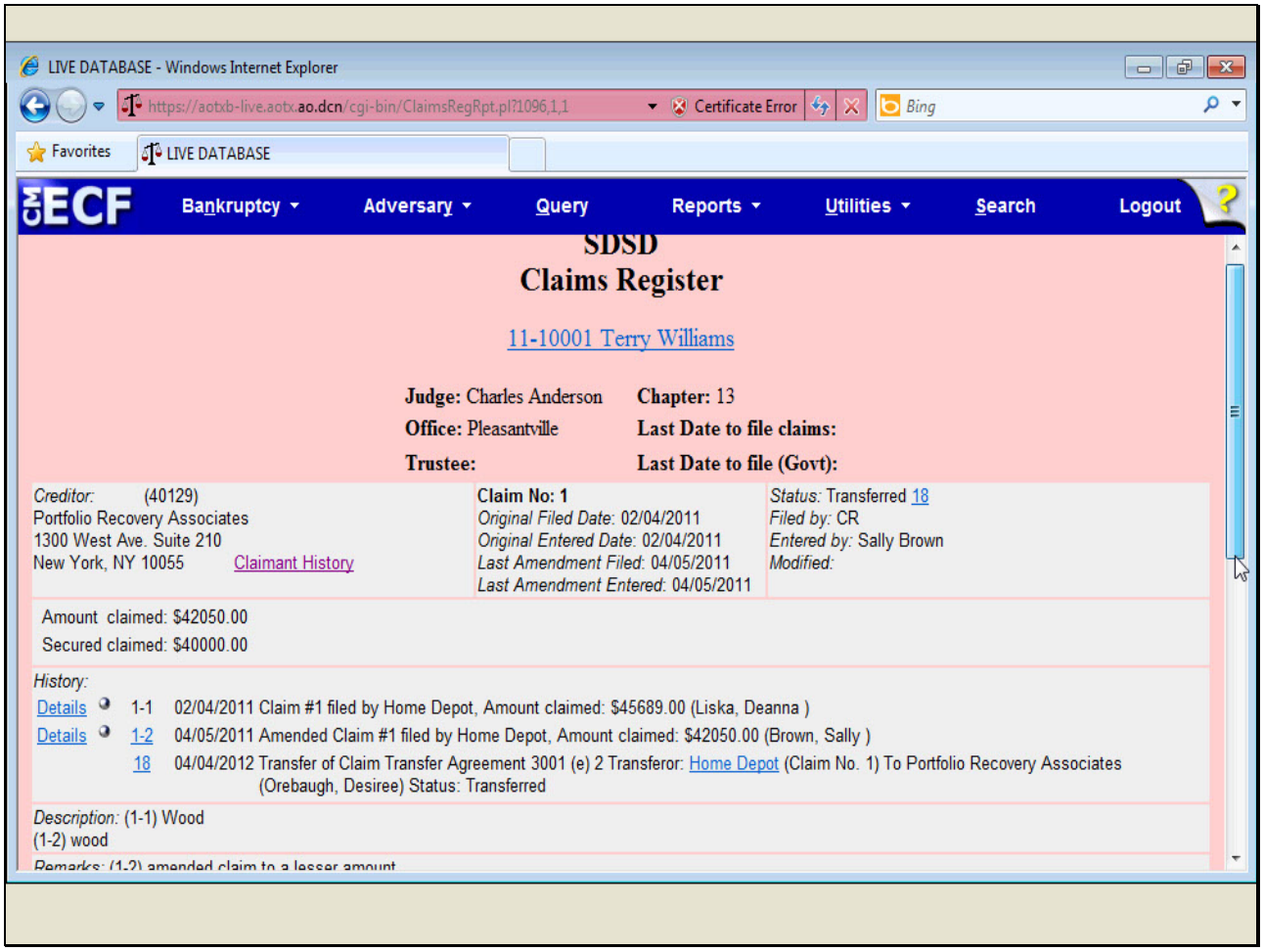
Slide 62 - Slide 62



Slide notes

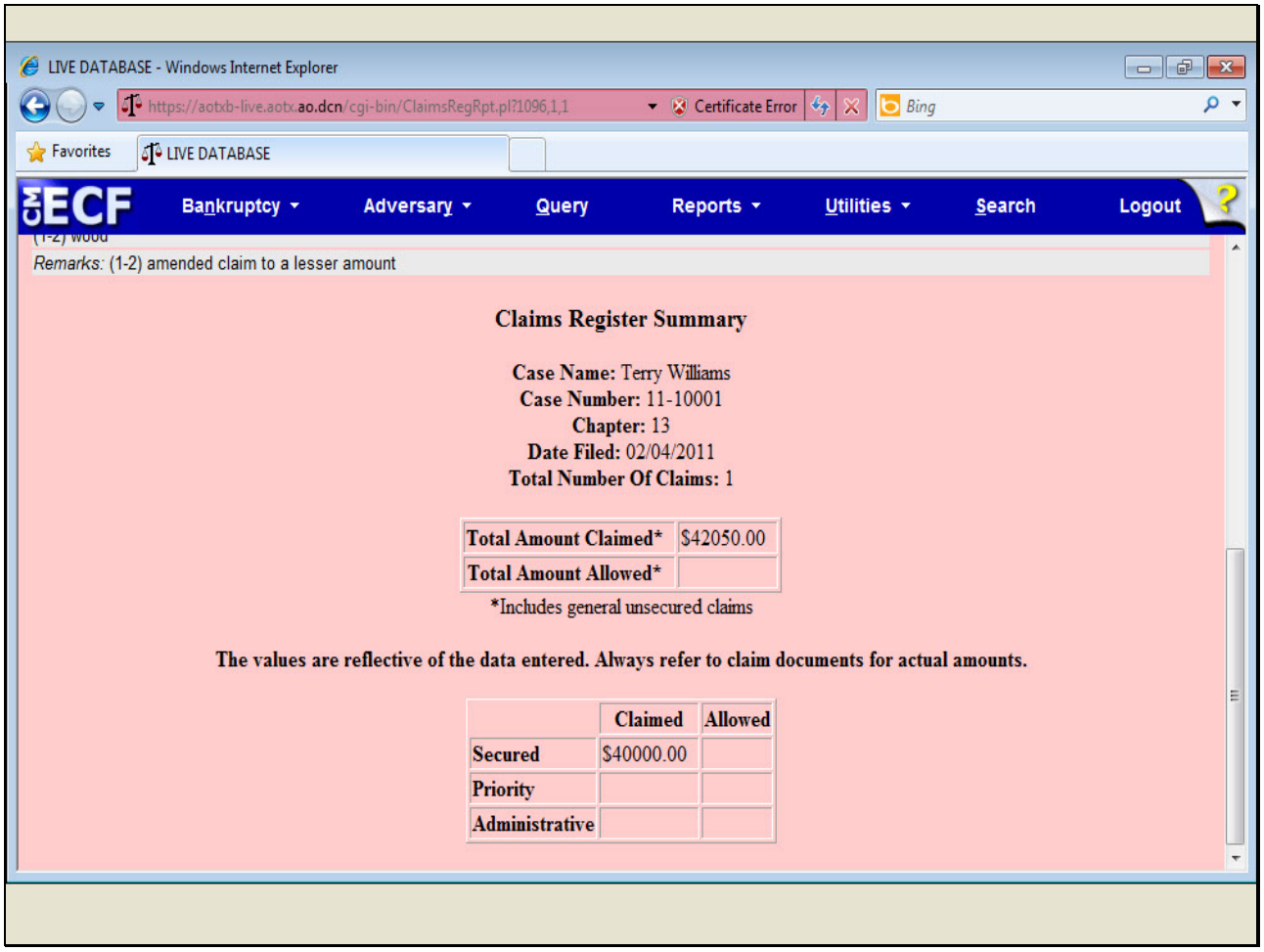
Let's scroll down to view the claims register summary for this individual claim.

Slide 63 - Slide 63



Slide notes

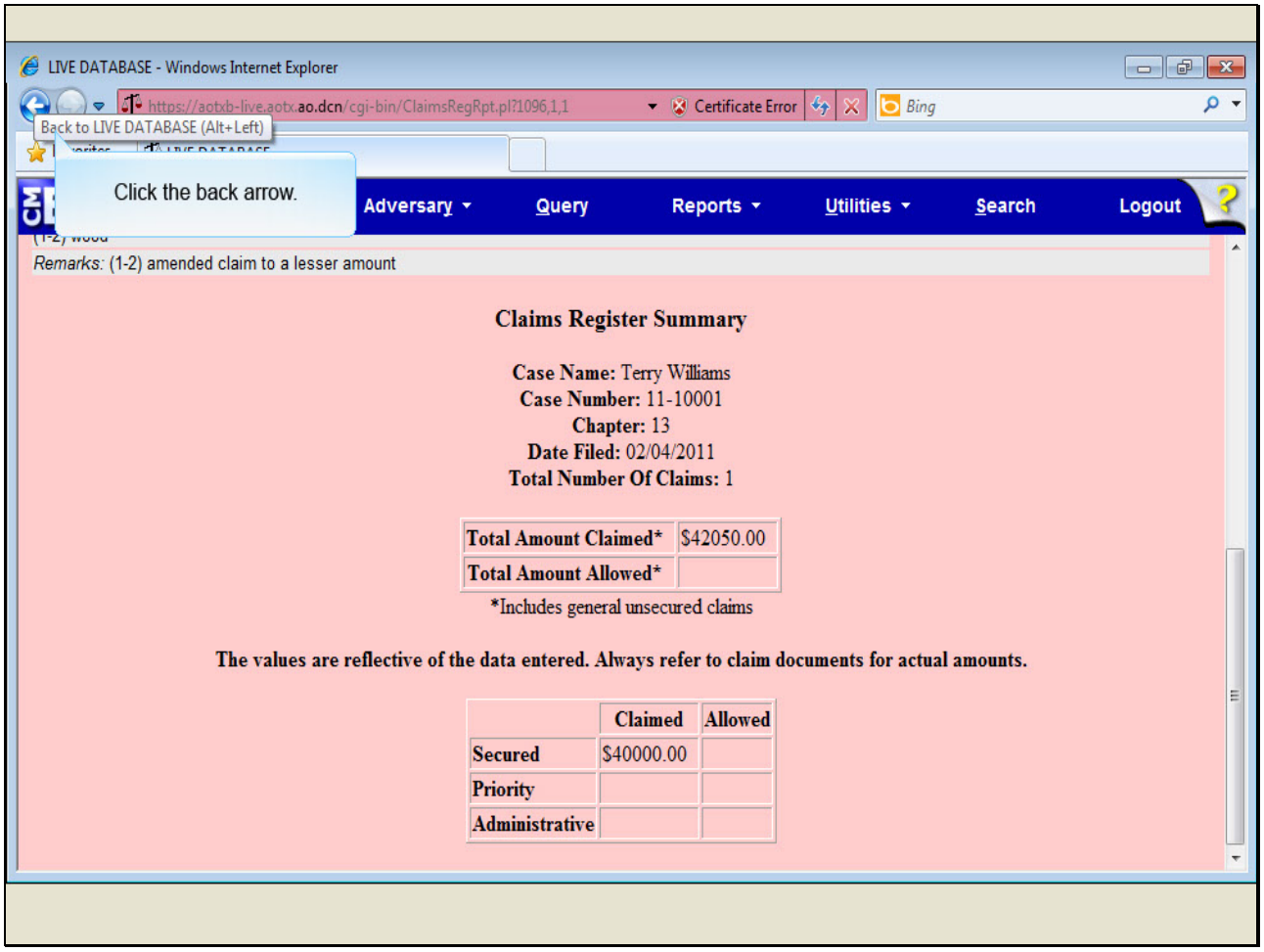
Slide 64 - Slide 64



Slide notes

Here is the summary for the individual claim, showing the total amount claimed and the amount secured.

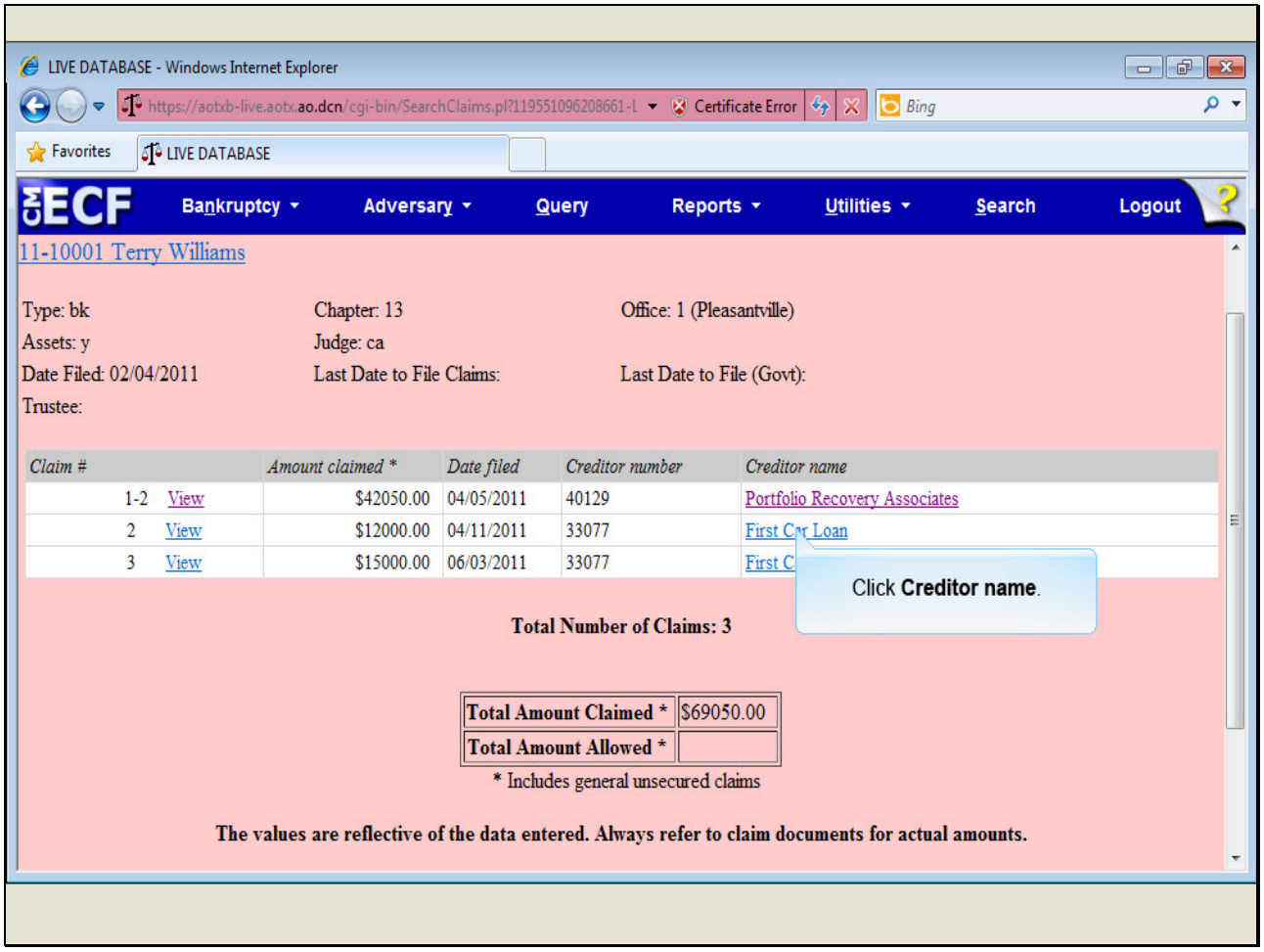
Slide 65 - Slide 65



Slide notes

Let's click the back arrow to return to the Claims Register.

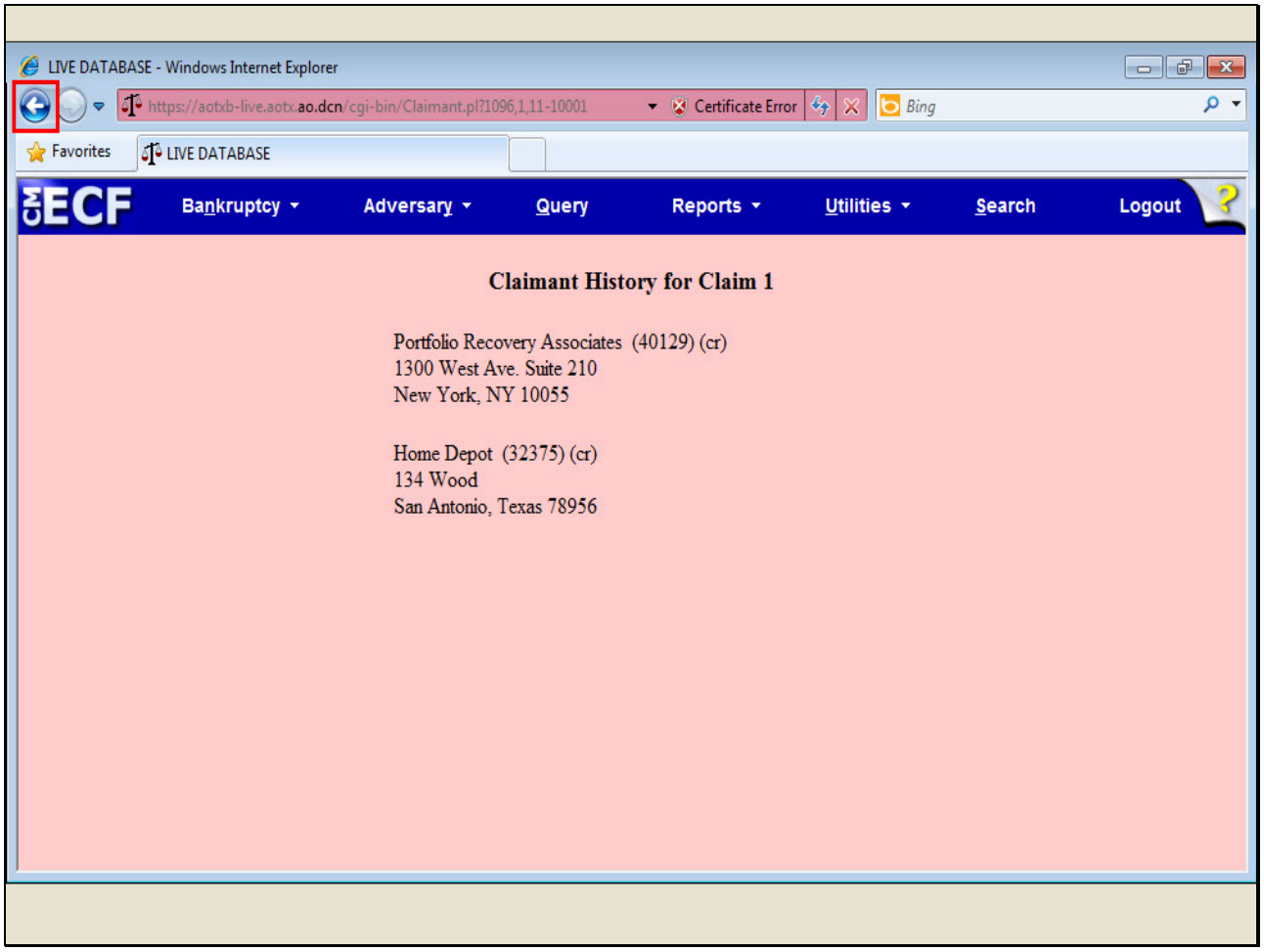
Slide 66 - Slide 66



Slide notes

We can also view creditor or claimant information by clicking the creditor name.

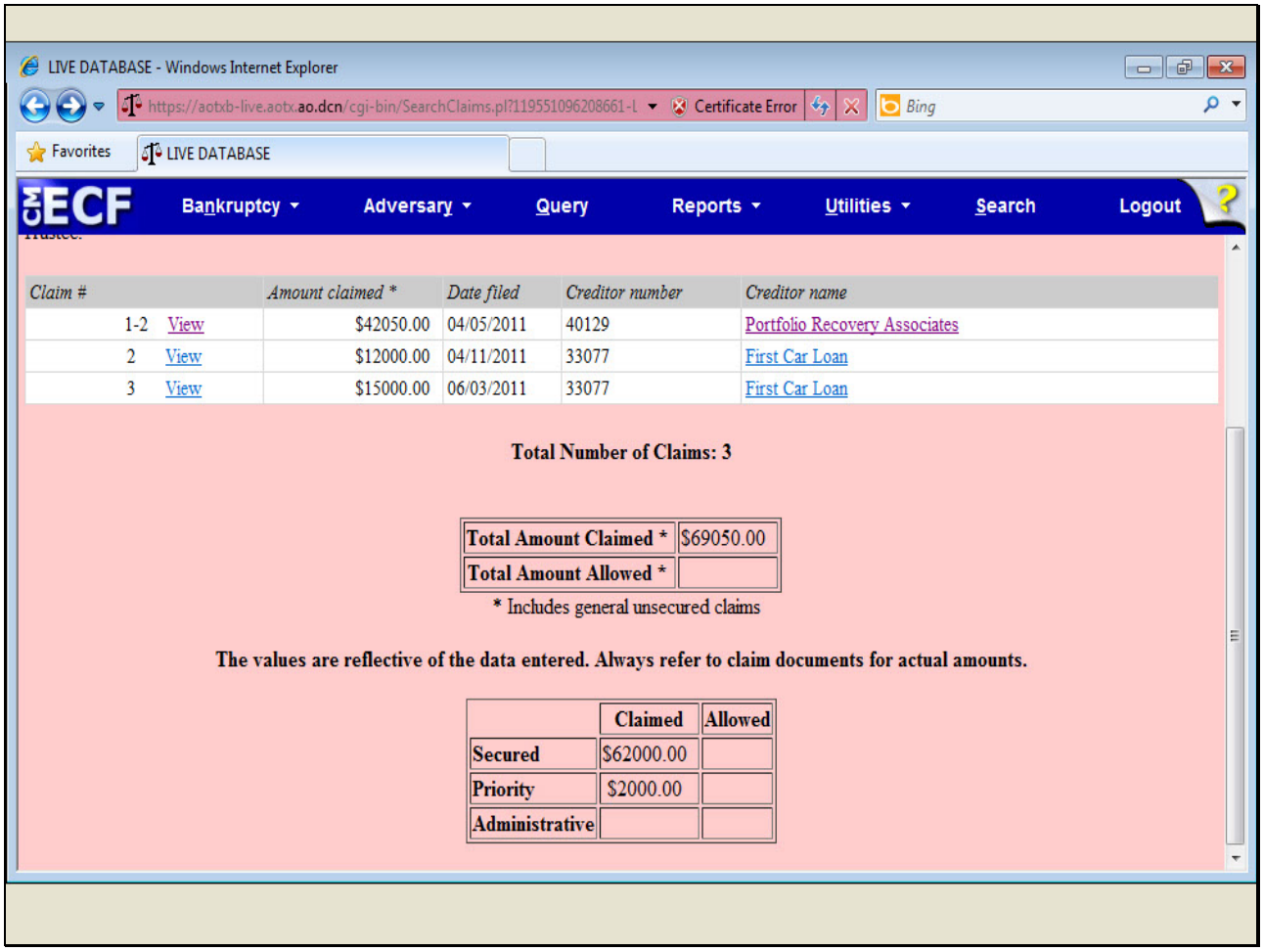
Slide 67 - Slide 67



Slide notes

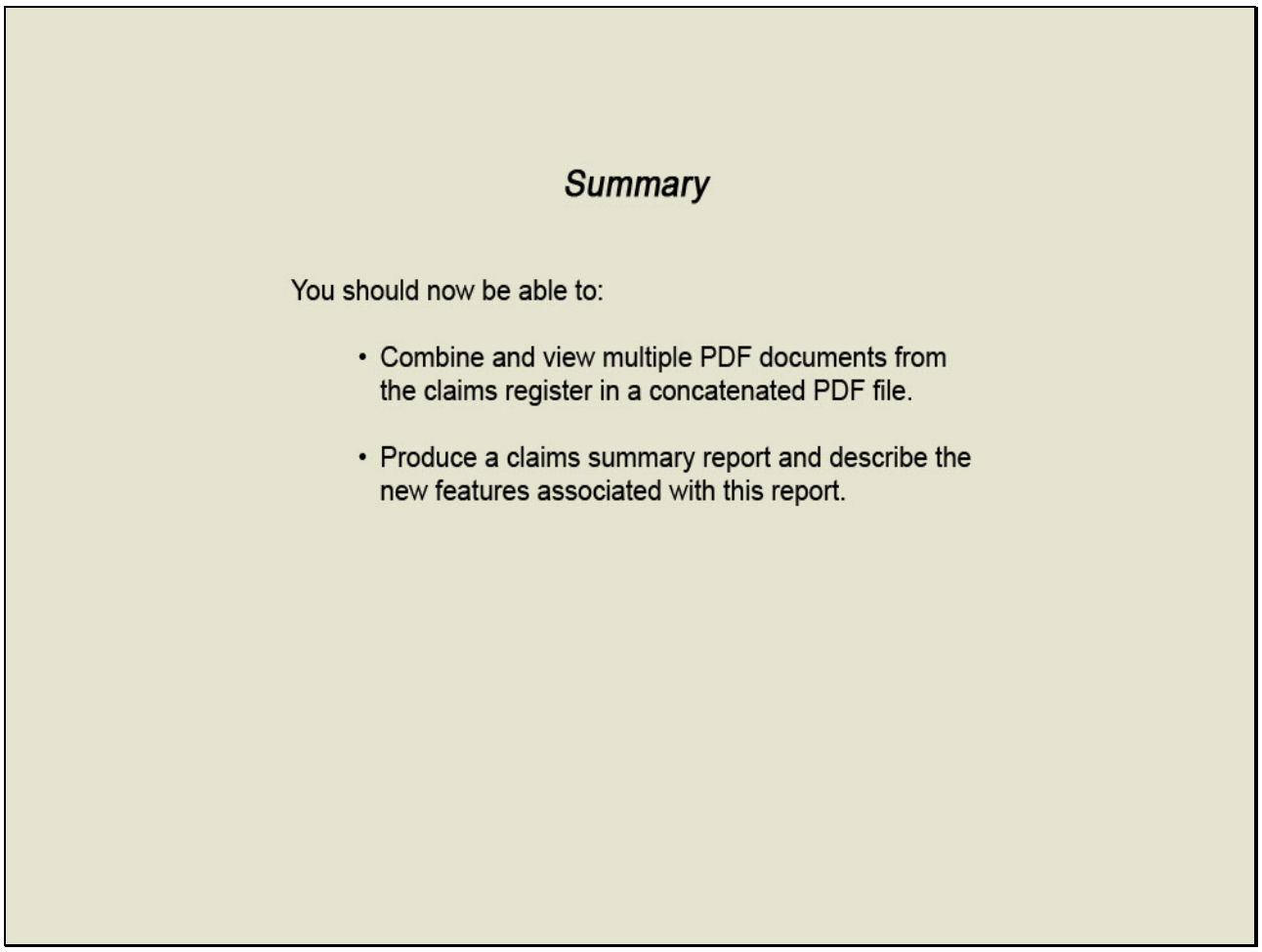
In this example, Home Depot is the original creditor, but since they transferred the claim to Portfolio Recovery Associates, both creditors are listed in the Claimant History for Claim 1. Once again, to return to the Claims Register, click the back arrow.

Slide 68 - Slide 68



Slide notes

Slide 69 - Summary



Slide notes

You should now be able to combine and view multiple documents from the claims register in one larger PDF file and produce a claims summary report and describe the new features associated with this report.