

E-Orders

Trustee and Attorney Guidelines and Procedures



United States Bankruptcy Court Southern District of Georgia

Revised: May 2017

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E-ORDERS INTRODUCTION

E-Orders is a web-based application developed by the U.S. Bankruptcy Court for the Western District of Texas for electronically submitting, routing, reviewing, disposing, and docketing orders in conjunction with CM/ECF. It is a fully integrated system that allows attorneys and trustees to submit orders electronically and provides judges and court staff with the ability to process and sign these orders. Among the obvious benefits of this integration, attorneys using CM/ECF do not have to learn new software to submit orders to the court, and court staff can handle motions and orders with the same program. E-Orders requires a minimal amount of new data entry since it can access most of the pertinent case-related information (case title, related document, description, etc.) from the CM/ECF database.

E-Orders was designed to be flexible so that courts can use its many features in a variety of ways. For example, access to incoming orders can be easily configured, as well as the number and types of “folders” where the orders are routed. The application has enhanced features such as adding notes to alert the judge about problems or simple reminders and filters to select the type of orders to review or sign. Security features are also present to provide levels of access to authorized users and ultimately to prevent anyone but the judge from electronically signing the orders. Also, there is a program feature for judges to handle and sign orders when covering for a fellow judge. Signing orders is only one of the options available to judges once an order has been forwarded to them. In addition to signing the order, the judge can decide to deny the relief or render the order withdrawn or moot, in which case the application places a specialized digital stamp, such as, “Denied for the reasons orally stated on the record at the scheduled hearing date,” along with the judge’s electronic signature. This feature is flexible enough to allow the judge to have multiple individualized digital stamps.

In addition, E-Orders has the ability to upload, route, and sign orders in batches. Chapter 13 trustees can upload a number of standard orders in batch. Court staff can review and route these orders in batch to the judge for signature. The judge can then decide to sign these orders in batch. For example, if your Chapter 13 confirmation orders are form orders and the real review is done at confirmation, the judge can decide to sign a batch of these orders all with one click. This can be a tremendous savings in time and effort.

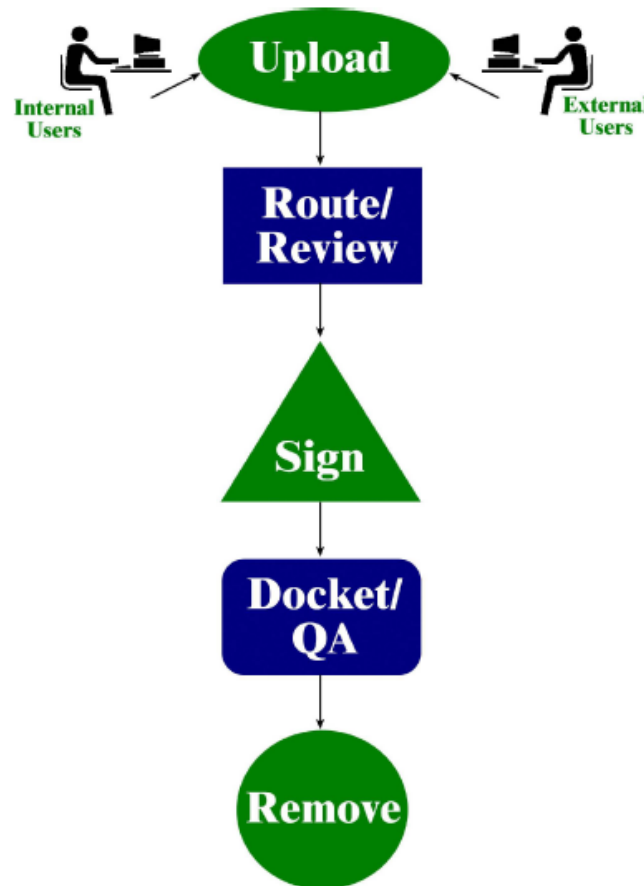
Uploading orders into the E-Orders application begins the process. Orders can be uploaded by two types of users—external and internal. The external users are the attorneys and trustees that work with the court, and the internal users include all court personnel. Attorneys can only upload orders one at a time. Chapter 13 trustees and internal users can upload orders in batches, as well as one at a time. Orders can be uploaded in both bankruptcy cases and adversary proceedings. The orders must be associated with a specific case and related document except for batch and *sua sponte* orders, which cannot be associated with a document. *Sua sponte* orders can only be uploaded by court users.

All orders must be converted to PDF format before uploading them into the application.

E-ORDER PROCESS OVERVIEW

E-Orders manages order processing from the submission of a proposed order, to reviewing and signing the order, to docketing and noticing of the order. The basic process is as follows:

- Proposed orders are uploaded into E-Orders by either internal or external users.
- Orders are then electronically routed and reviewed by the necessary staff.
- Once the order is ready for signature, it goes to the judge who can sign the order electronically.
- After the order is signed, it is manually docketed by court personnel. A quality assurance review is also incorporated into this step in the process.
- Lastly, the application administrator sets up and maintains the user accounts, security, and access to the system.



TECHNICAL REQUIREMENTS FOR E-ORDERS

Orders may only be uploaded in PDF or PDF/A format, and must contain a “.pdf” extension. No security should be applied to the PDF file. It is highly recommended that orders be created using a word processing application such as Word or WordPerfect and saved to PDF rather than scanning a printed copy of the document. This not only makes the order more legible, but also results in a text-searchable document.

Form orders published by the court must be “flattened” before uploading to lock in information. “Print” to PDF - if your software does not have this capability, print the order on paper and scan it to make a PDF file.

FORMATTING REQUIREMENTS (See attached order templates)

- Reserve the top 4 inches of the first page for the judge’s signature and any additional text the judge wishes to add. All other pages of the order should have top and side margins of one (1) inch.
- To assist the court in verifying that the entire body of the submitted order has been properly transmitted, the last line in the order must consist of **[END OF DOCUMENT]** in bold, upper case letters, centered on the page, one line below the end of the order’s text. Any signatures and/or attachments will be placed below this line.
- Do not include a line for the date and signature of the judge. All orders will be signed and dated electronically by the judge in the space provided at the top of the first page.
- Identify the attorney who is submitting the order directly below the **[END OF DOCUMENT]** text, to the left of the page by including a signature block as shown on the attached proposed order templates.
- Attach any exhibits after the page with the **[END OF DOCUMENT]** notation.
- Orders should NOT include distribution lists or certificates of service.

AP Order Template
4" margin required at top of first page.
Allow 1" for all remaining margins.

**IN THE UNITED STATES BANKRUPTCY COURT
SOUTHERN DISTRICT OF GEORGIA**

In the matter of:

John Q. Debtor

Chapter **XX** Case No. **XX-XXXXX-XXX**
Debtor(s)

Adversary Proceeding No. **XX-XXXXX**

Paula P. Plaintiff

Plaintiff(s)

vs.

Doug D. Defendant

Defendant(s)

TITLE OF ORDER

Order text. . .

[END OF DOCUMENT]

Prepared by:

s/ Typed name of attorney (or scanned signature)

Attorney Name

Attorney for [Party Name]

Bar Number _____

Street Address

City, State and Zip

Telephone Number

(If consent is required)

Consented to by:

s/ Typed name of attorney (or scanned signature)

Consenting Party's Name

Attorney for [Consenting Party]

Street Address

City, State and Zip

Telephone Number

BK Order Template
4" margin required at top of first page.
Allow 1" for all remaining margins.

**IN THE UNITED STATES BANKRUPTCY COURT
SOUTHERN DISTRICT OF GEORGIA**

In re:
John Q. Debtor
Debtor(s)

CASE NO. **XX-XXXXX-XXX**
CHAPTER **XX**

TITLE OF ORDER

Order text. . .

[END OF DOCUMENT]

Prepared by:

s/ Typed name of attorney (or scanned signature)
Attorney Name
Attorney for [Party Name]
Bar Number _____
Street Address
City, State and Zip
Telephone Number

(If consent is required)

Consented to by:

s/ Typed name of attorney (or scanned signature)
Consenting Party's Name
Attorney for [Consenting Party]
Street Address
City, State and Zip
Telephone Number

SUBMIT (UPLOAD) A PROPOSED ORDER

Before beginning this process, please review section describing requirements for E-Orders.

To upload an order related to a bankruptcy case, open CM/ECF and click **Bankruptcy** in the blue CM/ECF Main Menu bar. The Bankruptcy Events Screen appears.

NOTE: The process for uploading single orders to adversary proceedings is the same as uploading to bankruptcy cases with the exception that the users should choose **Adversary** on the CM/ECF Main Menu instead of **Bankruptcy**.



Click **Order Upload** and the Upload Type Selection screen appears.



UPLOAD SINGLE ORDER

The **Single Order Upload** feature permits you to upload one order at a time. When you select **Single Order Upload**, the following reminder appears. Click **Next** to continue.



An Enter Case Number screen appears for you to input the case number for the proposed order.

The screenshot shows the ECF Single Order Upload interface. At the top, there is a blue navigation bar with the ECF logo and menu items: Bankruptcy, Adversary, Query, Reports, Utilities, Search, and Logout. Below the navigation bar, the page title is "Single Order Upload". The main content area contains a "Case number" input field with the value "13-10009" and a "Find This Case" button to its right. Below the input field are two buttons: "Next" and "Clear".

After typing in the case number, click **Next**.

The Related Document Number screen appears.

The screenshot shows the ECF Single Order Upload interface. At the top, there is a blue navigation bar with the ECF logo and menu items: Bankruptcy, Adversary, Query, Reports, Utilities, Search, and Logout. Below the navigation bar, the page title is "Single Order Upload". The main content area contains a blue hyperlink "13-10009-SDB John B Test". Below the hyperlink is a "Related document number" input field. Below the input field are two buttons: "Next" and "Clear".

If you know the related document number, type it in the space provided and click **Next**. The Upload a Single Order screen appears. If you do not know the number of the related document, there are two ways to get the information. First, you can click the **case number hyperlink**, which produces a docket report for the case. You should note that when clicking this link, the PACER login page will appear since there are costs associated with looking at the docket report. The second method is to click **Next**. A search criteria screen appears.

The screenshot shows the ECF Single Order Upload interface. At the top, there is a blue navigation bar with the ECF logo and menu items: Bankruptcy, Adversary, Query, Reports, Utilities, Search, and Logout. Below the navigation bar, the page title is "Single Order Upload". The main content area contains a blue hyperlink "13-10009-SDB John B Test". Below the hyperlink is the text "Select the category to which your event relates:". Below this text is a dropdown menu with the following options: appeal, auditor, caseupld, claims, cmp, court, creditrd, misc, motion (highlighted), and notice. Below the dropdown menu are two "Filed" input fields with a calendar icon between them, and two "Documents" input fields with a "to" label between them. Below the input fields are two buttons: "Next" and "Clear".

The search criteria screen contains three selections. You must select a related document category. Your selection will almost always be motion. Optionally, you can enter a filed date and/or document number range to help narrow the search results. The dates are entered in the following format: mm/dd/yyyy.

After you have made your selections, click **Next**.

A search results screen displays.

If the document your order relates to is not shown, click your browser **Back** button to return to the search criteria screen.

ECF Bankruptcy Adversary Query Reports Utilities Search Logout ?

Single Order Upload
[13-10009-SDB John B Test](#)

Select the appropriate event to which your event relates:

- 10/30/2013 [4](#) Motion to Make Direct Payments to Trustee Filed by James B. Duncan III on behalf of John B Test . (Attachments: # [1](#) Proposed Order) (Saul, Lainie)
- 11/01/2013 [5](#) Objection to Claim Number 2 of Beneficial and Notice and Opportunity for Hearing. Filed by Huon Le. Responses due on or Before: 12/2/2013. (Attachments: # [1](#) Proposed Order)(Saul-trustee, Lainie)

Change your search criteria for a wider/different search. If only one document is found, it will automatically be selected for you. If the document appears in a list, click the check box to select, then click **Next**. The Upload a Single Order screen appears.

ECF Bankruptcy Adversary Query Reports Utilities Search Logout ?

Docket Sheet Claims Register Mailing Matrix by Case Deadlines/Hearings Calendar Events 11/1/2013 Associated Cases

Single Order Upload
[13-10009-SDB John B Test](#)

Related document number: 5
Related document description: Objection to Claim

Order type: **Ex Parte (No Hearing Required)**
Note: If the related document is an amendment and the original document has been set for a hearing, then select order type of Hearing Scheduled.

Hearing date: [Calendar icon] [Date field]

Notes: [Text area]


Folder: [Dropdown menu]

NOTE: The **Notes** and **Folder** selections only display for court users.

Confirm the **Case Number**, **Case Name**, **Related Document Number**, and **Related Document Description** shown at the top of the screen. Next, select the **Order Type** from the drop-down list. The **Order Type** selections are:

| **Consent** | **Expedited** | **Hearing Held** | **Hearing Scheduled** | **Other** |

If you select **Hearing Held** or **Hearing Scheduled** as the **Order Type**, you must fill in the **Hearing Date** field. If correct, click **Next**. The screen to attach a PDF appears.



MECF Bankruptcy Adversary Query Reports Utilities Search Logout ?

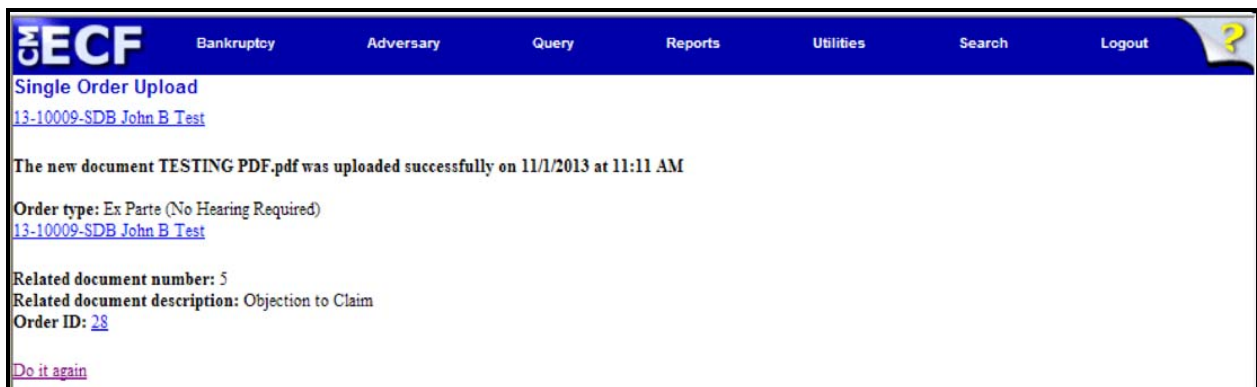
Single Order Upload

Filename
N:\PDF Files\TESTING PDF.pdf Browse...

Attachments to Document: No Yes

Next Clear

The **Filename** field is where you enter the path and filename of the proposed order PDF file. Click the **Browse** button to locate and select the file. You can also type the path and filename in the box. Please make sure the PDF file is correctly formatted - if incorrectly formatted the order may not process correctly through the court's noticing center. Finally, review all the information carefully and if correct click **Next**. A submission confirmation screen appears. You can view the uploaded PDF by clicking the hyperlink.



MECF Bankruptcy Adversary Query Reports Utilities Search Logout ?

Single Order Upload

[13-10009-SDB John B Test](#)

The new document TESTING PDF.pdf was uploaded successfully on 11/1/2013 at 11:11 AM

Order type: Ex Parte (No Hearing Required)
[13-10009-SDB John B Test](#)

Related document number: 5
Related document description: Objection to Claim
Order ID: [28](#)

[Do it again](#)

DEFECTIVE ORDERS

If a proposed order is found by the court to be defective, a text only Deficiency Notice (RE: Proposed Order) will be sent to the submitting party. The notice will advise you what corrections are needed and will instruct you to resubmit the order via the E-Order module. To resubmit, click on **Bankruptcy > Order Upload > Single Order Upload**, enter the same case number and related document number, and select replace the order.

You must also file the corrected proposed order on the docket and serve the order on appropriate parties using the event **Bankruptcy > Miscellaneous > Proposed order with Certificate of Service**.

UPLOAD AN ADDITIONAL ORDER OR REPLACE AN ORDER IN UPLOAD SINGLE

In some instances an uploaded order may need to be replaced or a second order uploaded. For example, the judge might direct an attorney to submit a revised order. The attorney submitting the original proposed order can replace that submission with a revised order. An order cannot be replaced if the original order has already been routed to the Judge. In this case, the application will let you know the order cannot be replaced. You cannot replace an order uploaded by a different filer.

The process of replacing an order or uploading an additional order is essentially the same as the upload process described in this section. After selecting the document number a Replace Order screen appears to let you know an order(s) already exists for this document number and gives you the option to create a new order or replace an existing order.



The screenshot shows the ECF (Electronic Case Filing) interface. The top navigation bar includes links for Bankruptcy, Adversary, Query, Reports, Utilities, Search, and Log. Below the navigation bar, there are several tabs: Docket Sheet, Claims Register, Mailing Matrix by Case, Deadlines/Hearings, Calendar Events (with a date of 11/1/2013), and Associated Cases. The main content area is titled "Single Order Upload" and displays a warning: "Warning: The following order(s) already exist for the same case and related document." Below the warning is a table with the following data:

Case Info	Related Doc	Order	Notes
13-10009-SDB John B Test Ch 13	5 Objection to Claim Filed: 11/01/2013	28 By Saul-trustee, Lainie 11/01/2013	

Below the table, there are two radio buttons: "Upload another order" (unselected) and "Replace the order(s)" (selected). Under "Replace the order(s)", there is a checked checkbox next to "Replace the order [28](#)". At the bottom left, there are "Next" and "Clear" buttons.

Choose whether to add another or replace the current order by clicking the appropriate radio button. If you choose to replace the current order, designate which order you are replacing by clicking the check box next to the corresponding order number. You can click the PDF hyperlink to review the PDF files to help determine the order to be replaced. You can check multiple boxes to replace more than one order at a time.

After making your selections, click **Next**.

The Upload a Single Order screen appears.

Add the necessary information the same way as in Upload Single. Then finish the upload process as described. A confirmation screen lets you know the process was completed successfully.

UPLOAD BATCH ORDERS (Trustees)

NOTE: *There is no Batch Upload option for attorney filers or for adversary proceedings.*

The Upload Batch feature allows trustees and court personnel to upload multiple orders at one time. The application ensures trustees can only upload orders for cases assigned to them. You must have the case number and PDF filename for each order before beginning the batch upload process. Each batch uploaded must contain the same Order Type and Order Description for each order in the batch. Trustees can upload orders with different descriptions to the same case. After selecting Order Upload from the Bankruptcy Events screen, click Upload Batch on the Upload Type Selection screen. An Upload Batch Orders screen appears prompting you to enter the Order Type; Order Description; Hearing Date, if appropriate; and the Case Numbers.

The screenshot shows the ECF Batch Order Upload interface. The top navigation bar includes 'Bankruptcy', 'Adversary', 'Query', 'Reports', 'Utilities', 'Search', and 'Log out'. Below this, there are links for 'Docket Sheet', 'Claims Register', 'Mailing Matrix by Case', 'Deadlines/Hearings', 'Calendar Events', and 'Associated Cases'. The main form area is titled 'Batch Order Upload' and contains the following fields: 'Order type' (dropdown menu set to 'Other'), 'Order description' (dropdown menu set to 'Order to Pay Wages'), 'Hearing date' (calendar icon), and 'Case number(s)' (a list of three text boxes containing '1:13-bk-10001', '1:13-bk-10002', and '1:13-bk-10003'). At the bottom left of the form are 'Next' and 'Clear' buttons.

The **Order Types** are the same as those listed in Upload Single. If you select the **Order Type** of *Hearing Held* you must fill in the **Hearing Date** field or you will not be able to finish the upload process. The **Hearing date** must be the same for each order in the batch.

Next, type in the case numbers related to each order in the format XX-XXXXX. Press **Enter** after each case number to create a list of case numbers. There is no limit to the number of cases that can be listed, but we recommend that you enter no more than 50 numbers at a time. (If you make a mistake you will have to retype the entire list.)

After typing the case number list, click **Next**.
 The Batch Orders PDF Selection screen appears.

The screenshot shows the ECF Batch Order Upload interface. At the top, there is a navigation bar with tabs for Bankruptcy, Adversary, Query, Reports, Utilities, Search, and Log. Below this is a secondary menu with options like Docket Sheet, Claims Register, Mailing Matrix by Case, Deadlines/Hearings, Calendar Events (set to 11/1/2013), and Associated Cases. The main content area is titled 'Batch Order Upload' and contains two case entries:

- Case 13-10007-SDB Karen B Test with an 'Add main document' button.
- Case 13-10010-SDB Laker Blue, III with an 'Add main document' button.

At the bottom of the screen, there are 'Next' and 'Clear' buttons.

For each case number, enter the path and filename of the proposed order PDF file by clicking **Add main document** to locate and select the file or typing the complete path and filename in the box.

This screenshot shows the ECF Batch Order Upload interface after the 'Add attachment' step. The navigation and menu bars are identical to the previous screenshot. The main content area is titled 'Batch Order Upload' and shows the same two case entries. For each case, an 'Add attachment' button has been clicked, and a table of uploaded files is displayed:

File Name	Category	Description	Size	Delete	Status
TESTING PDF.pdf		Main Document	N/A	<input checked="" type="checkbox"/>	Added to List

The same table structure is shown for the second case, 13-10010-SDB Laker Blue, III. At the bottom, 'Next' and 'Clear' buttons are visible.

When all files are attached, click **Next**.

Review all information carefully. Once you click **Next** you will not have an opportunity to modify the submission.

Batch Order Upload

13-10007-SDB Karen B Test

Add attachment

File Name	Category	Description	Size	Delete	Status
TESTING PDF.pdf		Main Document	N/A	<input type="checkbox"/>	Added to List

13-10010-SDB Laker Blue, III

Add attachment

File Name	Category	Description	Size	Delete	Status
TESTING PDF.pdf		Main Document	N/A	<input type="checkbox"/>	Added to List

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

Next Clear

After you click **Next**, you will receive a confirmation screen. If you would like to view the uploaded documents, click each new PDF file hyperlink.

Batch Order Upload

The following orders were uploaded successfully on 11/1/2013 at 11:36 AM
Order type: Other
Order description: Order to Pay Wages

[13-10007-SDB Karen B Test](#)

File Name	Description	Size	Order Id
TESTING_PDF.pdf	Main Document	8KB	29

[13-10010-SDB Laker Blue, III](#)

File Name	Description	Size	Order Id
TESTING_PDF.pdf	Main Document	8KB	30

[Do it again](#)

CHECKING THE STATUS OF A SUBMITTED ORDER

After uploading a proposed order into ECF using Upload Order, the status of the order may be checked by using the Order Query option under the Reports Menu.

1. To query the status of an order, select Order Query on the Reports Menu.
2. If searching for a particular order that has been uploaded, enter the case number and any optional parameters, and click **Next**.

Order Query

Case Number

Submitted date to

Docket date to

Include proposed orders where no action was taken.

Include proposed orders that have been docketed.

Include proposed orders that are being processed.

Check *Include proposed orders where no action was taken* to display replaced or rejected orders.

Check *Include proposed orders that have been docketed* to display orders that have been signed and docketed.

Check *Include proposed orders that are being processed* to display orders that have been submitted and are awaiting review, signature and entry.

3. When the case number selection is used, the report will list all orders that were electronically uploaded, currently pending for that case.

Case Number x	Related Doc# x	Order x	Type x	Description x	Submission Date x	Submitter x	Status x
13-10007-SDB Karen B Test		29	Other	Order to Pay Wages	11/01/2013	Saul, Lainie	No Action Taken 11/01/2013
13-10007-SDB Karen B Test		31	Other	Order to Pay Wages	11/01/2013	Saul, Lainie	No Action Taken 11/01/2013
13-10007-SDB Karen B Test		32	Other	Order to Pay Wages	11/01/2013	Saul, Lainie	No Action Taken 11/01/2013
13-10007-SDB Karen B Test	4	33	Ex Parte (No Hearing Required)	Motion to Make Direct Payments to Trustee	11/01/2013	Saul-trustee, Lainie	Being Processed

4. If the case number is left blank, all pending orders that you have uploaded will appear.

Case Number x	Related Doc# x	Order x	Type x	Description x	Submission Date x	Submitter x	Status x
09-40034-LWD Yoko Lennon	36	538	Other	Motion to Allow Change of Venue for good cause	06/19/2014	Saul-attorney, Lainie	Being Processed
11-10006-SDB Timothy Ray Hillis and Denise Audrey Hillis	7	272	Other	Motion for Relief From Stay	03/06/2014	Saul-attorney, Lainie	No Action Taken 04/08/2014
11-10015-SDB Alfie Rubin and Annie Rubin	7	271	Other	Motion to Borrow	03/06/2014	Saul-attorney, Lainie	No Action Taken 03/25/2014
11-40007-LWD Charlie Chuck Brown	15	662	Other	Motion to Close Case (Ch 11)	10/02/2014	Saul-attorney, Lainie	Being Processed

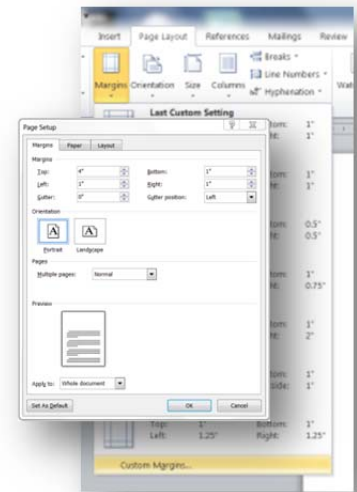
5. An order uploaded into ECF using Order Upload, will be on this Order Query Report with a Status of ***Being Processed*** from the time it is uploaded until it is signed by the judge or has been routed to the Trash folder. Therefore, if you have uploaded an order and it is no longer on the Order Query Report, it has either been signed by the judge or has been routed to Trash. If the order has been signed, you can obtain a copy of the signed order from the docket after it has been docketed. A signed e-order will be docketed by the close of the next business day after it has been signed. So if your order is not on the Order Query Report and is not yet on the docket, you should check the docket at the end of the next business day. You will not be able to locate a signed order until it is docketed. If the order is not on the Order Query Report because it was sent to the trash folder, you should have been notified of that.

HOW TO SET MARGINS IN WORD

Word 2007 / 2010

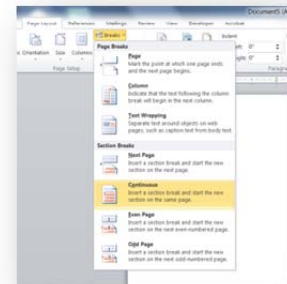
To set the top margin of the first page of your proposed order to 4 inches:

1. Place the cursor at the top of the first page (Ctrl+Home).
2. Click **Page Layout>Margins>Custom Margins**.
3. In the Page Setup Window, type "4" into the Top Margin input box.
4. Click **OK**.



To set the top margin of all other pages to 1 inch:

1. Insert a continuous section break.
 - a. Click **Page Layout>Breaks>Continuous**.
2. Change the top margin to 1 inch.
 - a. Click **Page Layout>Margins**
 - b. Select desired setting with 1 inch top margin (Normal, Narrow, Moderate, etc.) or set with custom margin.

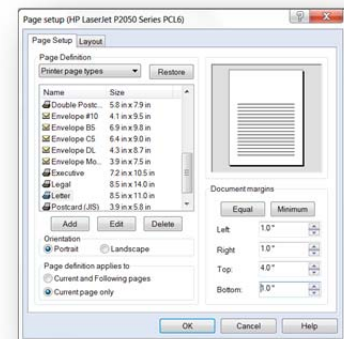


HOW TO SET MARGINS IN WORDPERFECT

WordPerfect (any Windows version)

To set the top margin of the first page of your proposed order to 4 inches:

1. Click **Format>Margins** in the toolbar or press **Ctrl+F8**.
2. A new window will open with the four margins listed (Left, Right, Top, and Bottom) with a default of 1".
3. Type "4" into the Top margin input box.
4. Click **OK**.



To set the top margin of all other pages to 1 inch:

1. On second page of document, repeat steps 1-4 above, but change top margin to 1".

HOW TO FLATTEN A PDF

Certain versions of Adobe Acrobat and other PDF editing software are known to cause serious document image quality issues when a PDF file is electronically filed through CM/ECF. As a result, all PDF files **must** be “flattened” **before** filing through CM/ECF. Flattening a PDF file may also reduce the file size of a PDF fillable form by up to 90%, conserving valuable resources for the Court.

Instructions to Flatten a PDF File:

- Create a PDF document for filing as usual
- From the **Print** feature, select *Adobe PDF* as the printer (see print screen)
- Select **Print** button at the bottom of the screen.
- Name the document and select **Save**.
- Upload the document into CM/ECF using normal procedures.

