



Office of the Clerk  
United States Bankruptcy Court, Northern District of California

MEMORANDUM

To: All CM/ECF Steering Committee Members

From: Wendy Kan, Recorder

Date: February 11, 2003

Subject: ***CM/ECF Steering Committee Meeting - January 24***

Attending: Gloria L. Franklin, Clerk of Court  
Kathy Bernart, Manager, Information Technology Division  
Dennis J. Bilecki, CM/ECF Project Manager/Division Manager, Santa Rosa Division  
Lynne M. Higgs, General Counsel  
Marilyn Hunt, UNIX Systems Manager, Information Technology Division  
Sharon Hurt, Trainer  
Elaine M. Seid, Bay Area Bankruptcy Forum Representative (*via teleconference*)  
Mike Sorgaard, Office of the United States Trustee

*Absent: The Honorable Leslie J. Tchaikovsky  
Edward Emmons, CM/ECF Operations Subcommittee Chair/ Manager, Oakland  
Division*

The meeting was called to order at 1:40 p.m.

**Summary of Event/Findings from CM Test Day**

CM Test Day was held on January 22. This event gave staff the chance to view the CM system and to test the new program. There were no systems problems. However, some divisions need to further develop their business processes. Approximately 12,280 entries were docketed into the CM system.

Several errors were received from the BNC. Quality control may be needed for the BNC portion of CM. Another test day may be held to test the BNC notices.

**Status of Internal User Training Plan**

The training dates were tentatively set for the weeks of February 3, 10 and 17. Training will be held primarily in the Oakland and San Francisco divisions. Fourteen employees were selected as trainers. The training agenda will be distributed in the afternoon of January 24.

The train-the-trainer sessions will be held on January 28 and 30. All trainers will have the opportunity to conduct at least one module. The trainers will submit a list of potential classes they want to teach.

The longest module is the bankruptcy case opening/BNC noticing portion (two to three hours).

The training manuals will be reproduced and a test case and documents will be created in the training database. The manuals will be given to the trainers with instructions to distribute to staff on day of training.

A meeting to discuss the cash register program, CARE, training will occur on February 10. Two training sessions will be held on that day.

The training form was posted on the CM/ECF intranet for staff to download and complete. The training schedule will also be posted. CARE training is mandatory for case administrators with intake duties.

The judges were notified of the upcoming training sessions.

### **Upcoming CM/ECF Attorney Orientation Presentations**

Roger and Val will provide a presentation to the Santa Clara Legal Secretaries Association. Liz and Dennis will facilitate the February 11 event for the San Francisco Bar Association. The Sonoma County Legal Secretaries Association has also requested a CM/ECF seminar.

An open invitation was posted in the court's CM/ECF webpage for professional organizations to request court-conducted CM/ECF seminars.

Elaine indicated that even though several orientations were conducted throughout the district, there are still some attorneys who did not know about these presentations. The problem may be that some attorneys do not belong to the bar association or other professional groups.

Elaine will contact the Bay Area Bankruptcy Forum to schedule a CM/ECF orientation in their April/May calendar.

### **Status of CM/ECF Interim Operating Order**

This item was tabled to the February 21 meeting.

Judges Carlson and Grube have identified three documents that must be physically submitted to chambers as courtesy copies. These documents include trial exhibits, findings of fact and conclusion of law and trial briefs. Judges Carlson and Grube will also make two recommendations regarding submitted orders.

The judges agreed that extensions will be given on a case-by-case basis for missed deadlines due to technical failure.

#### **Status of Santa Rosa Email Submitted Order Process**

Judge Jaroslovsky is testing the process of receiving submitted orders via email. The process is going smoothly. This project is limited to submitted orders after a hearing. Judge Jaroslovsky is reporting his findings to the other judges.

There being no further business, the meeting was adjourned at 3:15 p.m. The next CM/ECF Steering Committee meeting is scheduled for 1:30 p.m., on Friday, February 21 in San Francisco.

Respectfully Submitted,

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Wendy Kan, Recorder