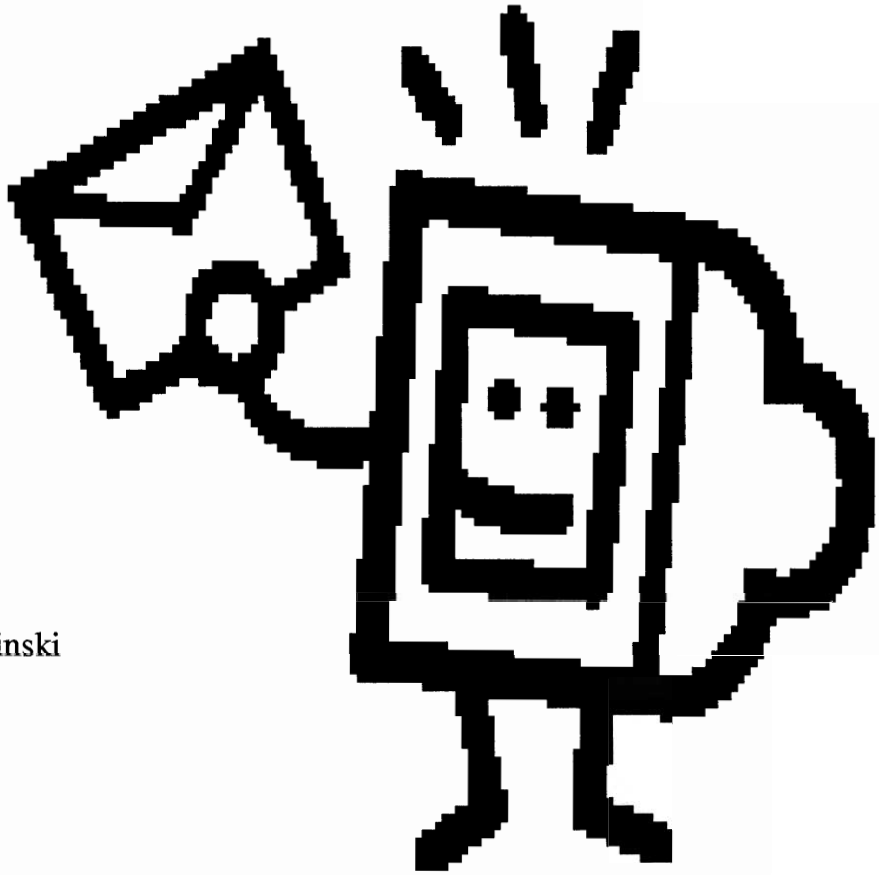
MANAGING E-MAIL



Presented By:

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U.S. Trustee Office
(402) 221-4300

WELCOME TO E-MAIL:

Much of an attorney's life revolves around the mail (mailbox): what goes in, what comes out of it, and what gets lost in transit. Going to Electronic filing will change the way you deal with your mail.

The amount of paper mail each office receives will decline, but not rapidly. Many offices will continue to send paper copies of everything they produce. While it is very likely that paper mail will decline with time, it will not happen overnight. The Bankruptcy Court's noticing center will continue to send paper copies. Remember that non-court mail will remain the same and will not be affected by ECF and electronic noticing.

SETTING UP YOUR EMAIL:

This guidance attempts to help you effectively deal with ECF e-mail, these are just suggestions based on lessons learned and are not mandatory items for setting up and controlling your e-mail.

We would recommend that you set up a special mailbox specifically for ECF mail. Just as you might have an assistant or assistants who help you manage your incoming paper mail, "Microsoft Outlook" provides you with similar abilities by giving you the opportunity to give another person access to your ECF mailbox. This process is called "delegating." The person who owns the ECF mailbox grants the specific permissions to individuals based on the office needs. Some of the permissions include reading, creating, editing and sending. This process is shown on page of the handout.

CLEANING UP YOUR E-MAIL

In MICROSOFT:

> You can select to have your deleted mail folder deleted at the end of every day. Once an item is deleted, it is sent to a "deleted" folder, the items are temporarily deleted and are kept in this file until permanently deleted. Page goes through the steps in Microsoft to automatically delete your deleted folders' items so that it no longer takes up memory space.

SPECIAL FOLDERS:

You can set up special folders within your ECF mailbox where you can save items or have your rules set to automatically forward e-mails directly to them. An example would be if you only want to look at the Proofs of Claims filed once a week, you may set up a "proof of

claim" folder so that when a Proof of Claim is filed it will automatically go to this specific folder. Whoever is responsible for reviewing the proofs of claims will then access the special folder once a week and clean it out.

MAIL DELIVERY

You can select two options for receiving your ECF mail:

1. Can receive e-mail as documents are filed (24 hours a day-continually)
2. At end of each day (4:00pm)

RULES:

The goal is to develop and use rules that provide the greatest benefit to your office to assist in the administrative control of processing a large number of e-mails. It is likely that a rule cannot be created to handle every situation and that some routine daily administration of the mailbox will still be necessary. The rules shown in the handout are just examples and can be adapted to your office requirements.

Microsoft generally holds 30 to 40 rules depending on the size of your computer, however, you should not need more than 15 to effectively manager your e-mail. There will also be a size limitation on your mailbox memory. IT IS IMPORTANT to delete unnecessary mail and to remove mail as soon as possible to keep the mailbox from reaching full capacity. When you select your rules, try to select the rules that create the greatest benefit to your office and which most significantly contribute to minimizing routine daily monitoring of email. You may also select to have your deleted item's folder automatically deleted at the end of each day.

It is recommended that you DO NOT use case numbers when writing your rules. There are several reasons why we do not recommend using case numbers: if you set a rule for every case you are involved in this could very easily exceed the capabilities and limits of your mailbox; 99% of the time the case number is included in the subject line, however, it is not always included; you would spend a lot of time writing and rewriting rules based on your caseload.

We also suggest that you begin each rule by selecting "Check Mail when they arrive" and by selecting the "with specific words in subject" options.

Attached are copies of some general rules which can be applied to your office:

- Automatically delete mail
- Sound Notification
- Forward to another person as an attachment
- Forward to a specific folder

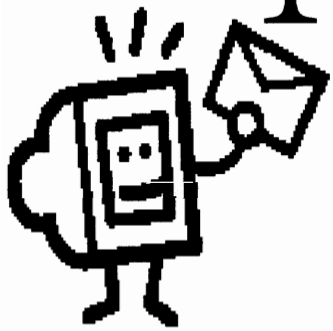
VIEWING E-MAIL

Once you receive your e-mail and are ready to review and read it, you are allowed ONE FREE look at the document through PACER. The next time the item is reviewed you will be charged. To receive your one FREE viewing you MUST select to view the DOCUMENT NUMBER, not the Case Number on the e-mail. If you select the case number, you will be billed. The "free viewing" must also be done within thirty (30) days of receipt.

DISCONTINUE SERVICE

If you are no longer going to be involved in a case, you can request that your service of notices, filing and other documents in the case be Terminated. You can obtain the form on the Bankruptcy Courts' website, www.neb.uscourts.gov. By Terminating you from a case is the only way that e-mail delivery will cease in a particular case.

The items included in the handout and presentation are not mandatory and are strictly suggestions from learned lessons. Some of the information was extracted from other U.S. Trustee Office Regional ECF handouts and Best Practices.



MANAGING E-MAIL

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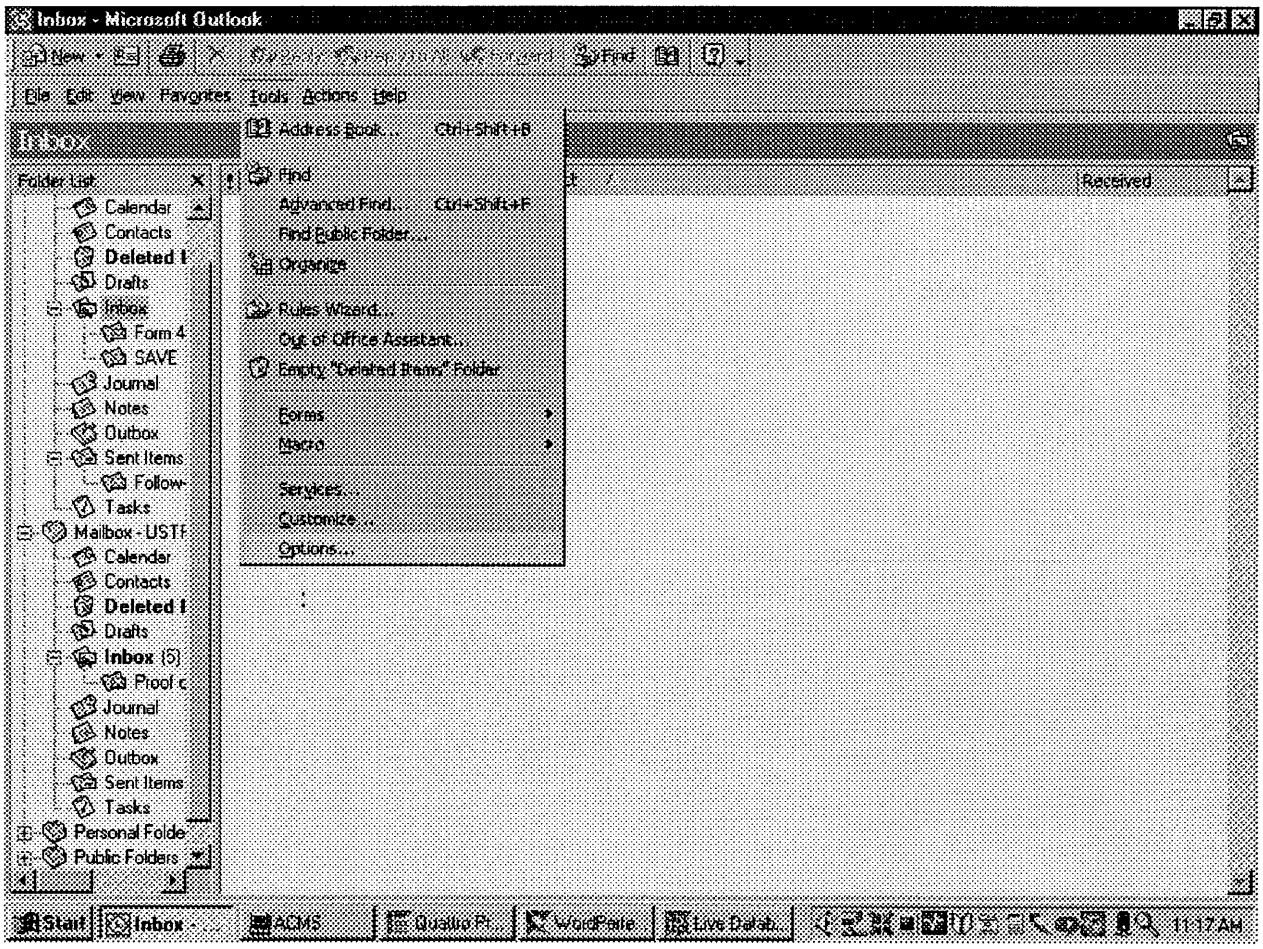
If you have questions regarding E-Mail Management please contact Jerry Jensen or Sue Bylinski at the Office of the United States Trustee: (402) 221-4300

SETTING UP ECF E-MAIL (Selecting Delegates)

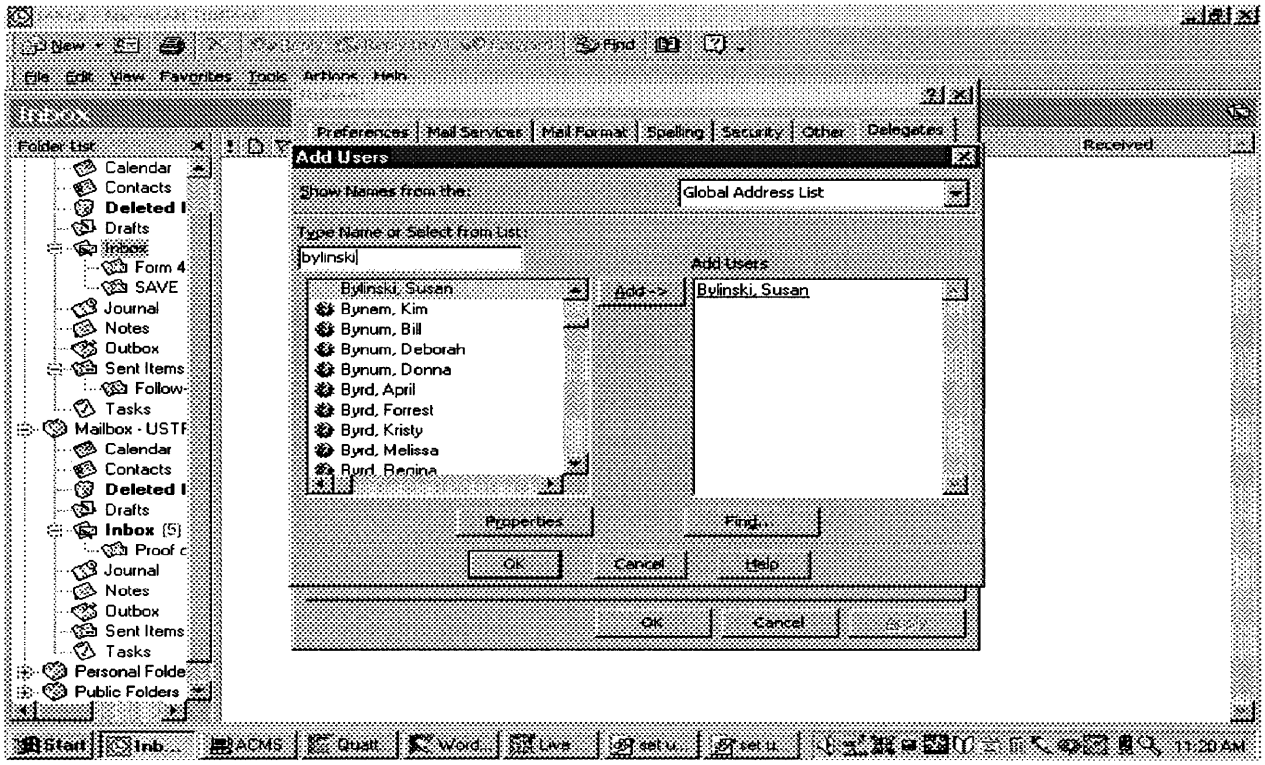
In preparation for CM/ECF, our office would recommend that you set up a special ECF E-mail mailbox for receiving electronic filings and notices only. This is the e-mail address that you will give to court to send your electronic notices and filing verifications.

When setting up your new mailbox you can delegate someone else permission to access your ecf mailbox so they can open mail, create items, respond and send mail from this mailbox.

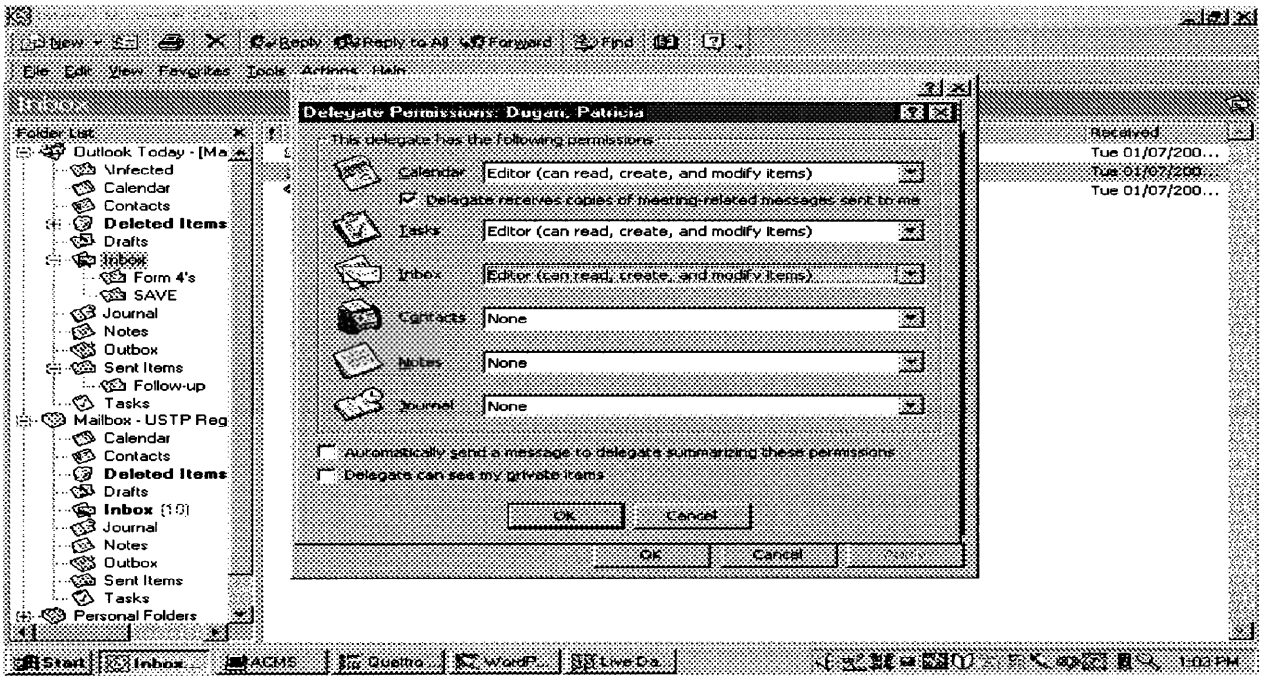


Once in the Options:
Select the Delegates Tab and click on Add

After you have selected Add, scroll down until you come to the name of the person you would like to delegate access. Highlight the name, click Add and then select OK.

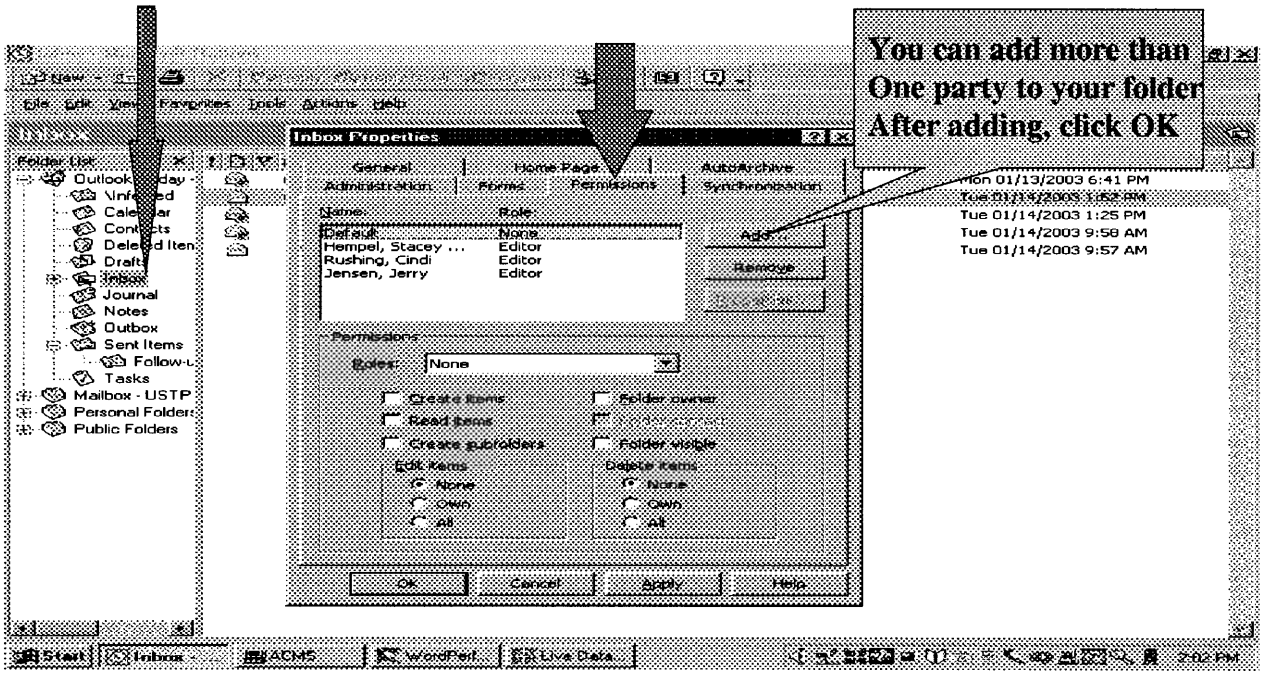


On the Delegate Permission screen, select the appropriate permissions for each delegate added. Select OK. This will take you back to the Options screen, click Apply. You can then proceed to Add another delegate or close the windows.

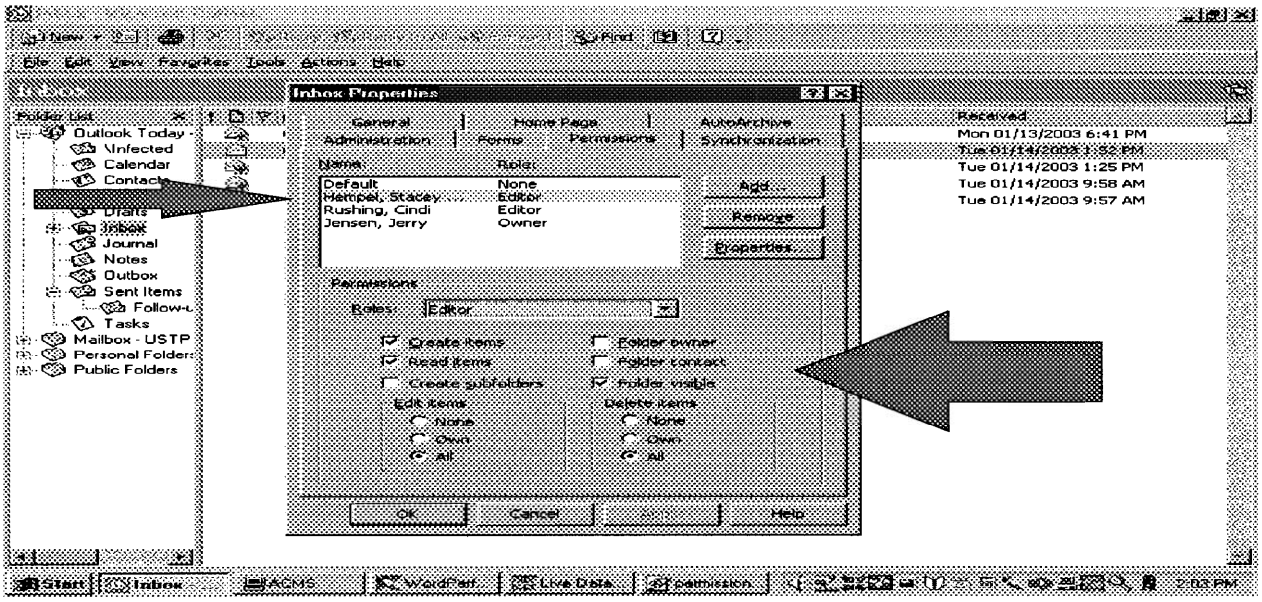


PERMISSIONS

Another option when setting up your new e-mail box is to set specific "permissions" for specific folders. To do this: Highlight the selected folder, right click you mouse and select "properties". Select the Permissions tab. Click on the Add button and select the individual to whom you want to give permission in this folder.

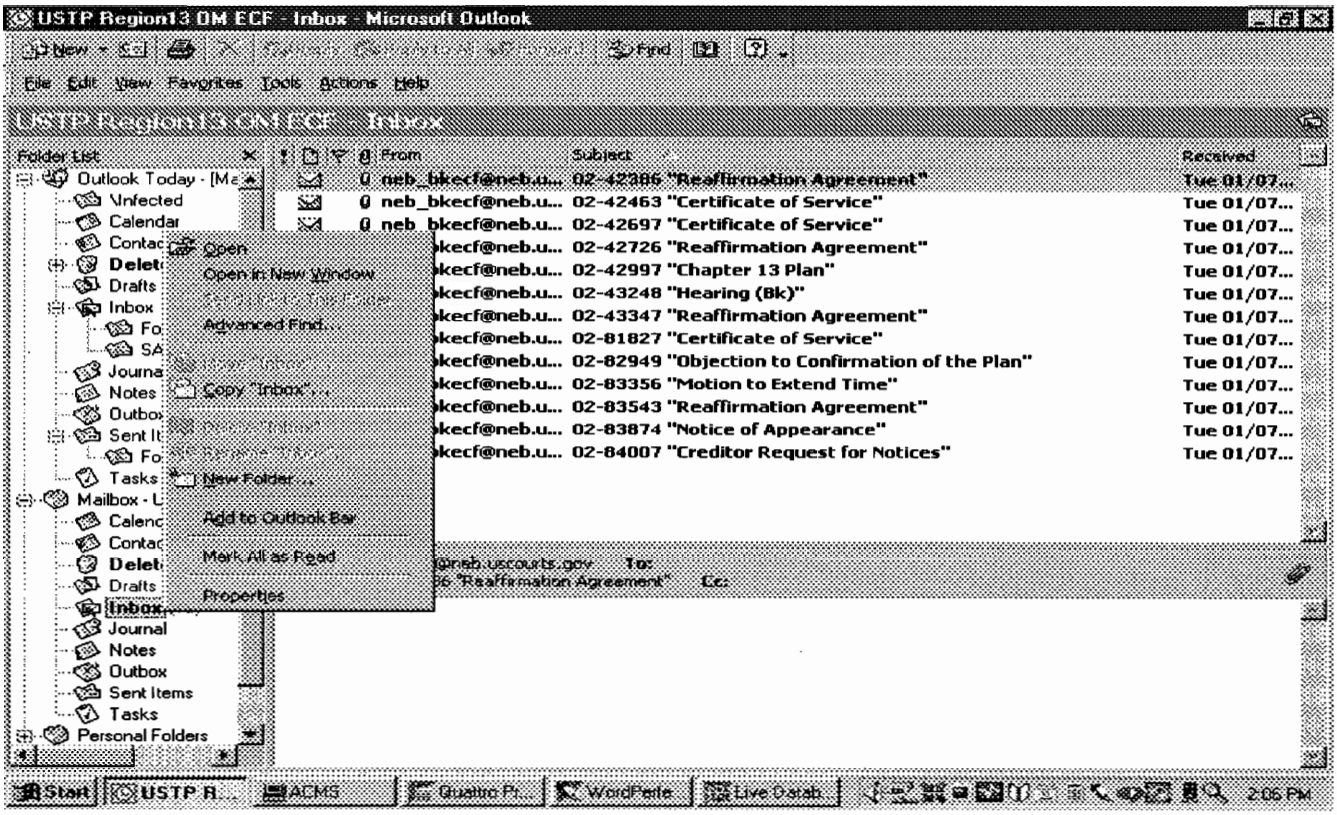


☞ **Next highlight the new name and select the properties or permissions below. Click OK when finished.**

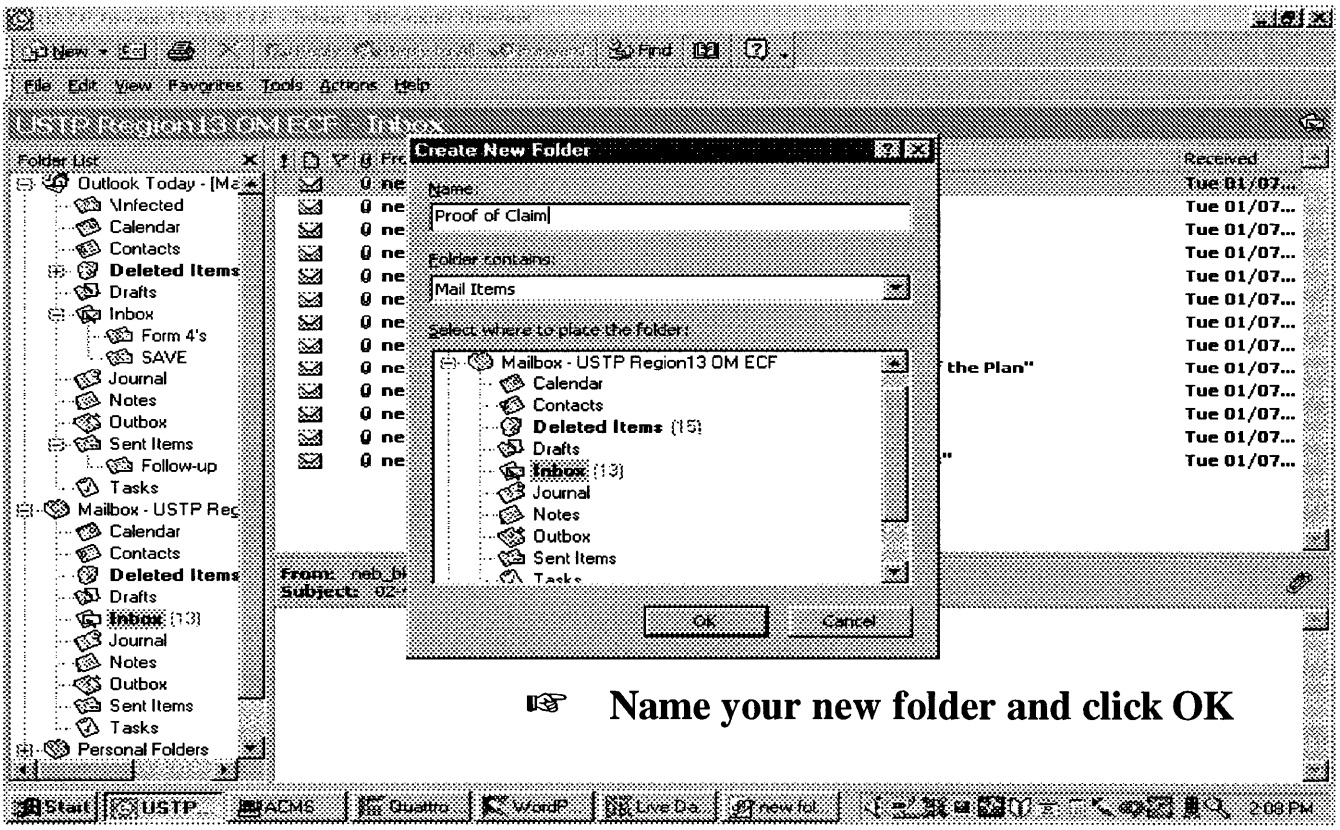


SPECIAL FOLDERS IN YOUR E-MAIL

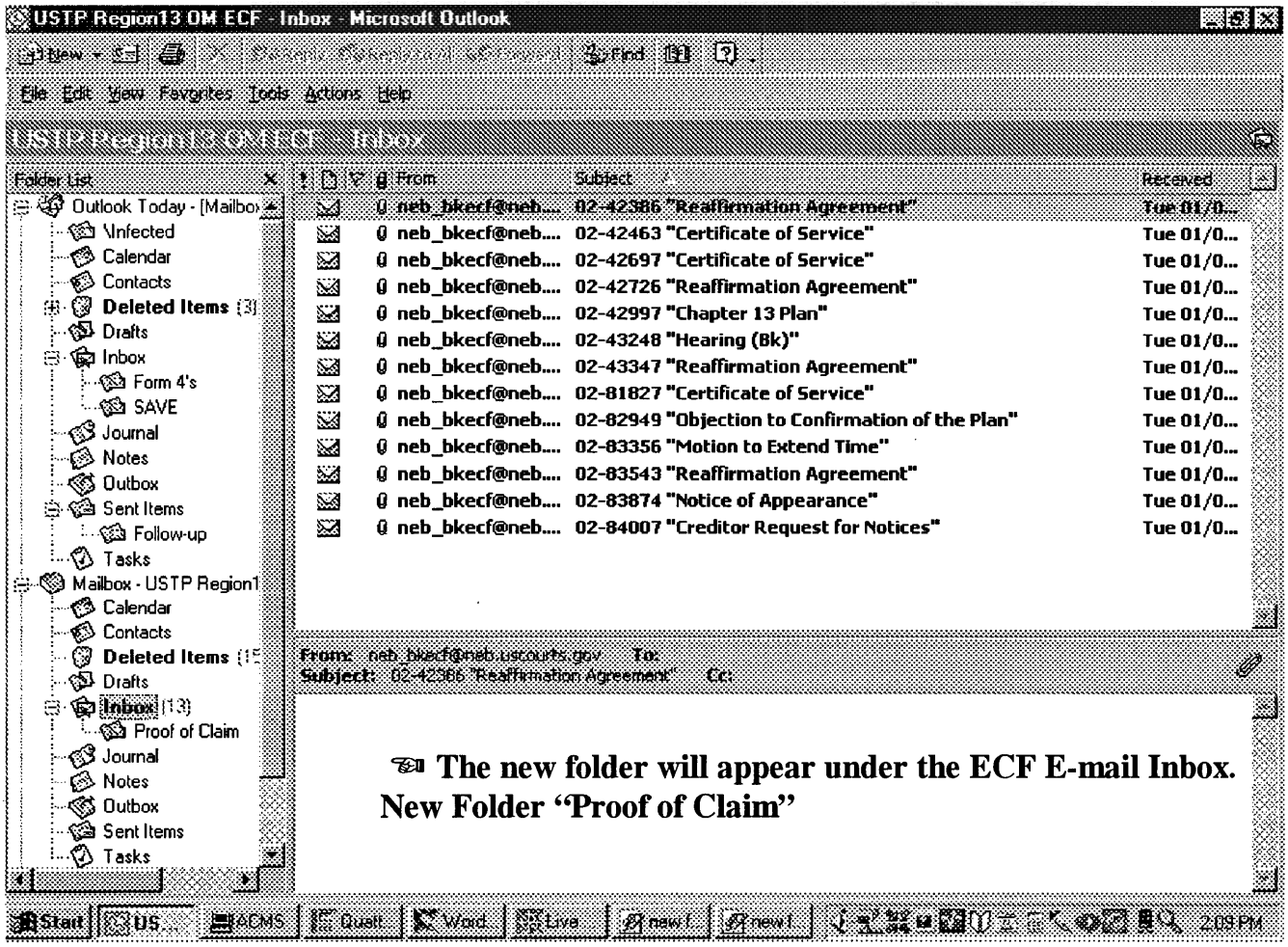
To set up a special folder in your ECF e-mail.



☞ **Highlight the ECF Mail Inbox, Right click your mouse and select New Folder**



☞ **Name your new folder and click OK**

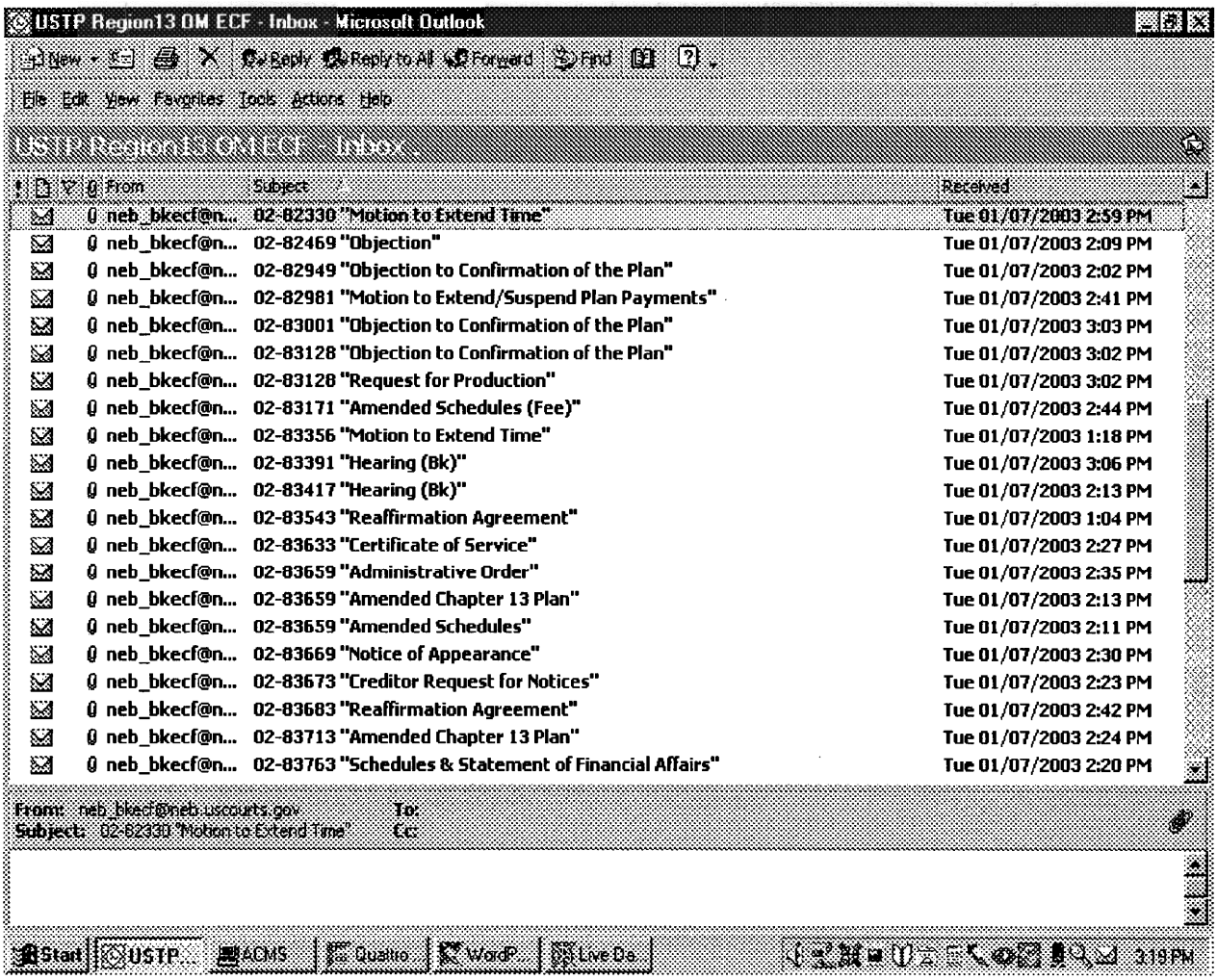


☞ **The new folder will appear under the ECF E-mail Inbox. New Folder "Proof of Claim"**

WHAT E-MAIL LOOKS LIKE IN YOUR ECF MAILBOX

Receiving E-mail from Bankruptcy Court. You have two options in receiving e-mail: 1) you can select to receive e-mail continuously throughout the day as items are filed, or 2) you can select to have your e-mail sent only one time a day (4:00p.m.).

When you receive your e-mail it will look similar to the following:



Another example page of E-Mails from the Bankruptcy Court.

USTP Region13 OM ECF - Inbox - Microsoft Outlook

New Reply Reply to All Forward Find

File Edit View Favorites Tools Actions Help

USTP Region13 OM ECF - Inbox

Folder List

- Calendar
- Contacts
- Deleted Items
- Drafts
- Inbox
  - Form 4's (3)
  - SAVE
- Journal
- Notes
- Outbox
- Sent Items
  - Follow-up
- Tasks
- Mailbox - USTP Region13 OM ECF
  - Calendar
  - Contacts
  - Deleted Items (243)
  - Drafts
  - Inbox (532)
  - Journal
  - Notes
  - Outbox
  - Sent Items
  - Tasks
- Personal Folders
- Public Folders

From	Subject	Received
neb_bke...	02-42542 "Close Bankruptcy Case"	Thu 01/16/2003 ...
neb_bke...	02-42542 "Discharge of Debtor"	Thu 01/16/2003 ...
neb_bke...	02-42543 "Close Bankruptcy Case"	Thu 01/16/2003 ...
neb_bke...	02-42543 "Discharge of Debtor"	Thu 01/16/2003 ...
neb_bke...	02-42557 "Order To Pay Wages"	Thu 01/16/2003 ...
neb_bke...	02-42603 "Objection"	Wed 01/15/2003...
neb_bke...	02-42623 "Close Bankruptcy Case"	Thu 01/16/2003 ...
neb_bke...	02-42623 "Discharge of Debtor"	Thu 01/16/2003 ...
neb_bke...	02-42642 "Reaffirmation Agreement"	Thu 01/16/2003 ...
neb_bke...	02-42643 "Close Bankruptcy Case"	Thu 01/16/2003 ...
neb_bke...	02-42643 "Discharge of Debtor"	Thu 01/16/2003 ...
neb_bke...	02-42644 "Reaffirmation Agreement"	Wed 01/15/2003...
neb_bke...	02-42646 "Amended Schedules (Fee)"	Wed 01/15/2003...
neb_bke...	02-42646 "Corrective Entry-No PDF"	Wed 01/15/2003...
neb_bke...	02-42646 "Order on Application to Employ"	Wed 01/15/2003...
neb_bkecf@neb.uscourts.gov	's Notice of Amended Plan"	Thu 01/16/2003 ...
neb_bke...	02-42677 "Order Confirming Chapter 13 Plan"	Thu 01/16/2003 ...
neb_bke...	02-42677 "Withdrawal"	Thu 01/16/2003 ...
neb_bke...	02-42721 "Objection"	Wed 01/15/2003...
neb_bke...	02-42738 "Amended Schedules (Fee)"	Thu 01/16/2003 ...
neb_bke...	02-42769 "Order Confirming Chapter 13 Plan"	Thu 01/16/2003 ...

From: neb_bkecf@neb.uscourts.gov To:
Subject: 02-42769 "Order Confirming Chapter 13 Plan" Cc:

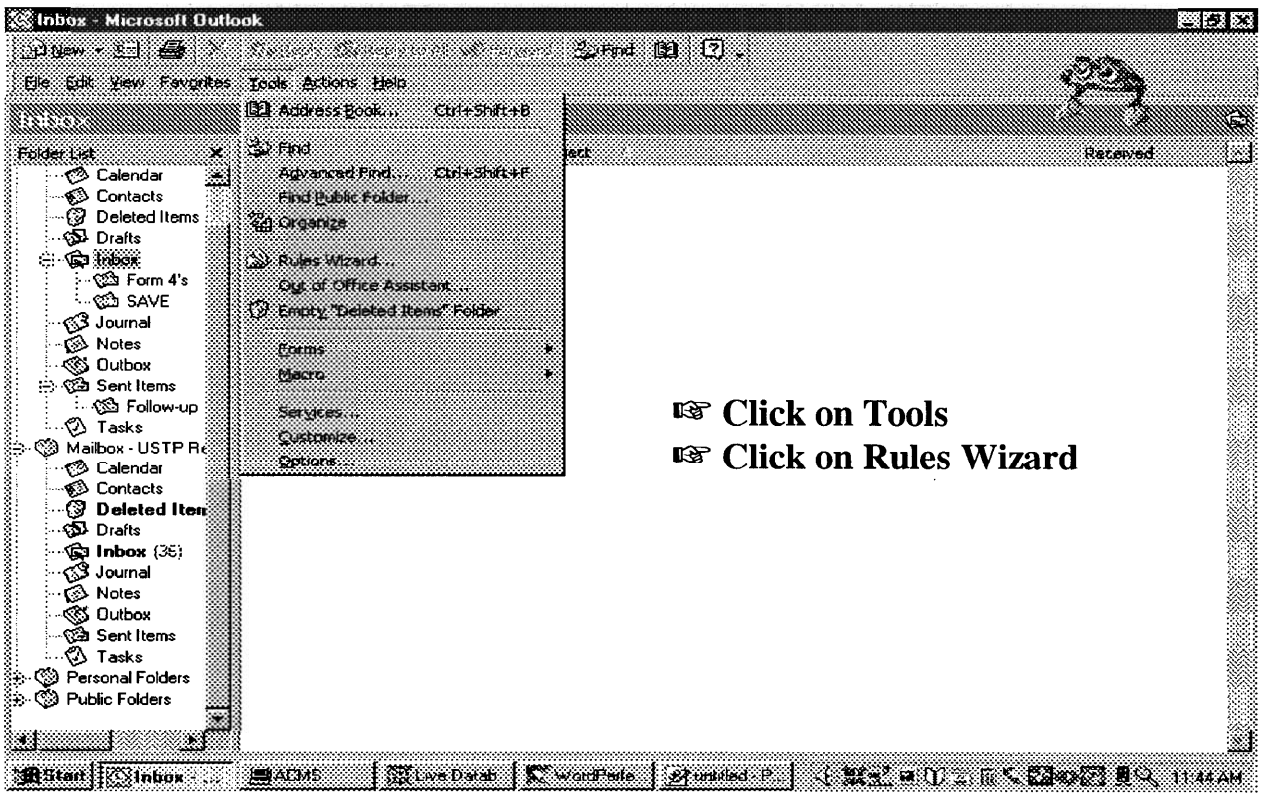
Start USTP... ACMS Live Da... Quattro WordP... 3:09 PM

TO SET RULES IN RULES WIZARD

You can create rules to assist in the distribution and management of your electronic e-mail. Microsoft will typically hold 30 to 40 rules depending on the complexity of each rule and your computer, however, you shouldn't need more than 15 to 20 rules to effectively manage your e-mail.

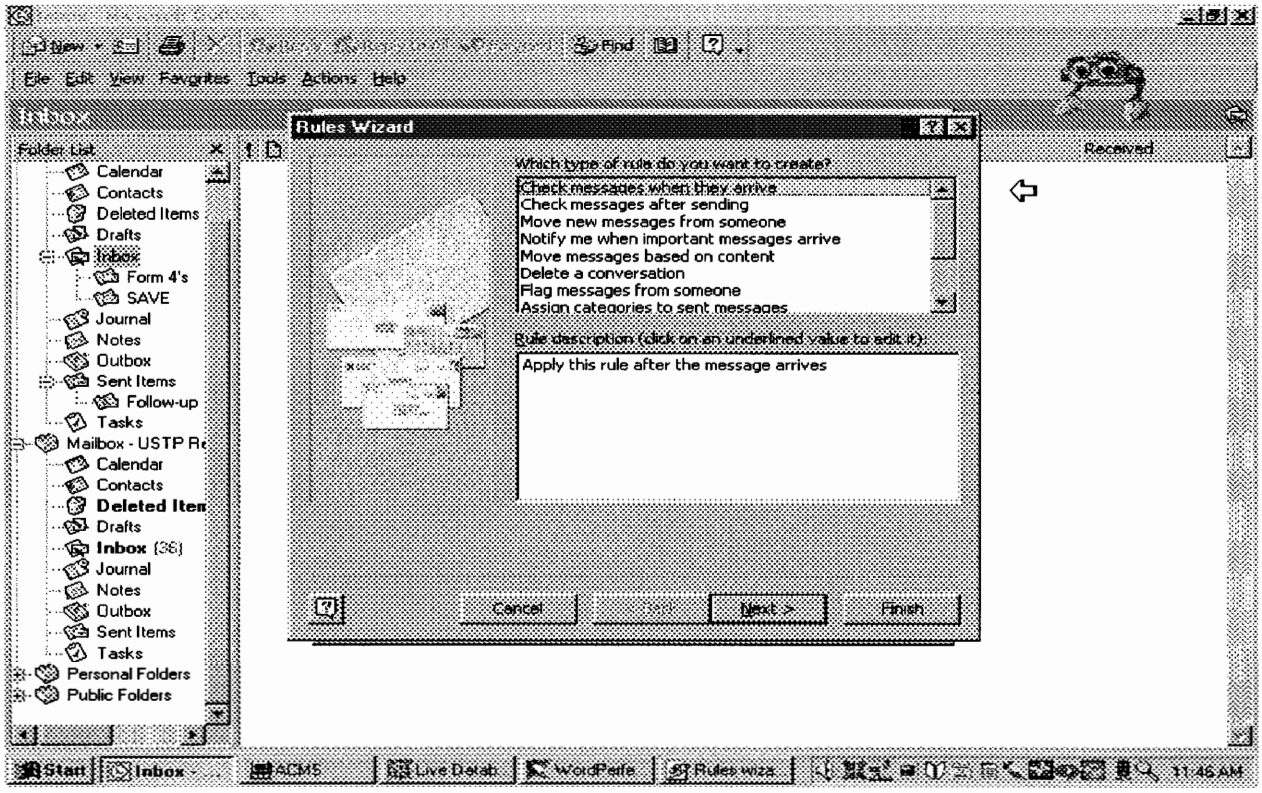
To set up Rules:

While in your ECF E-mail Inbox:

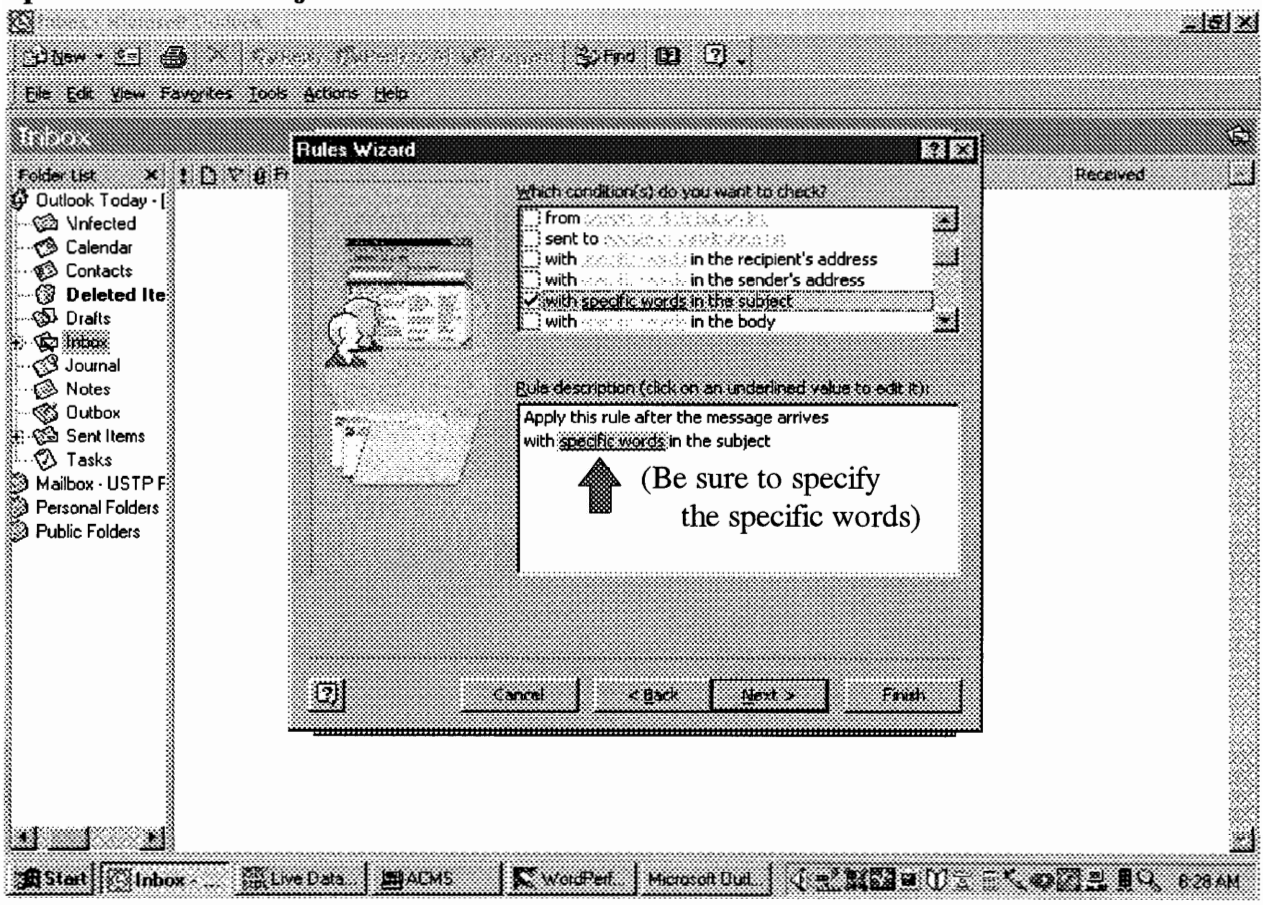


At the next screen, Click on New button

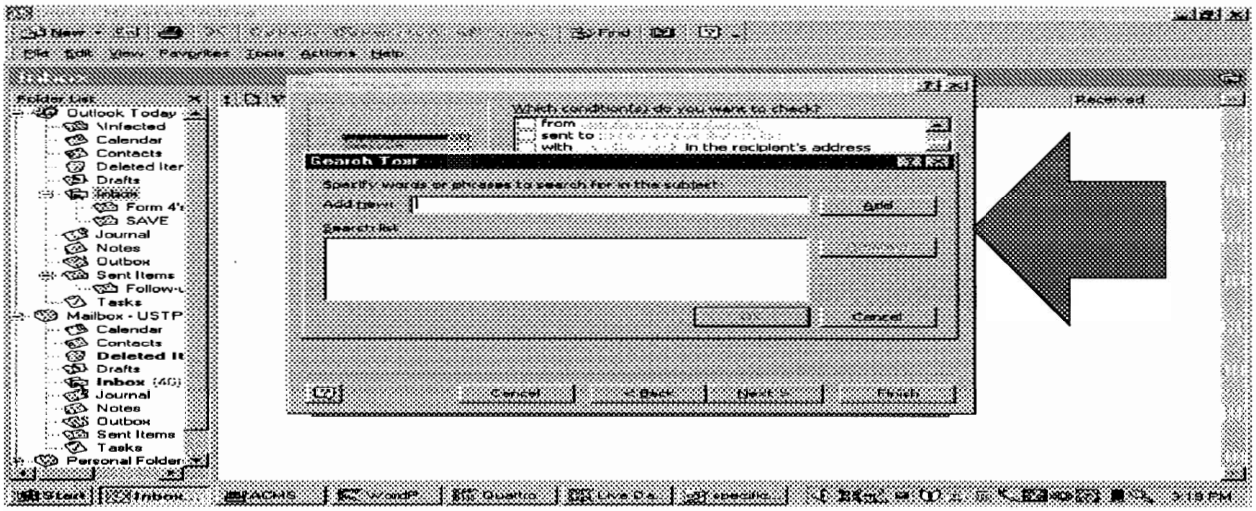
☞ **At the "Which type of rule do you want to create" prompt, make sure to highlight: "check messages when they arrive", click next**



☞At the "which condition do you want to check" prompt, scroll down to the option: "with specific words in subject" and click on the box next to it to select it.



☞After checking the Specific Words in subject you must go to the Rule description box below and click on the <u>specific words</u>.

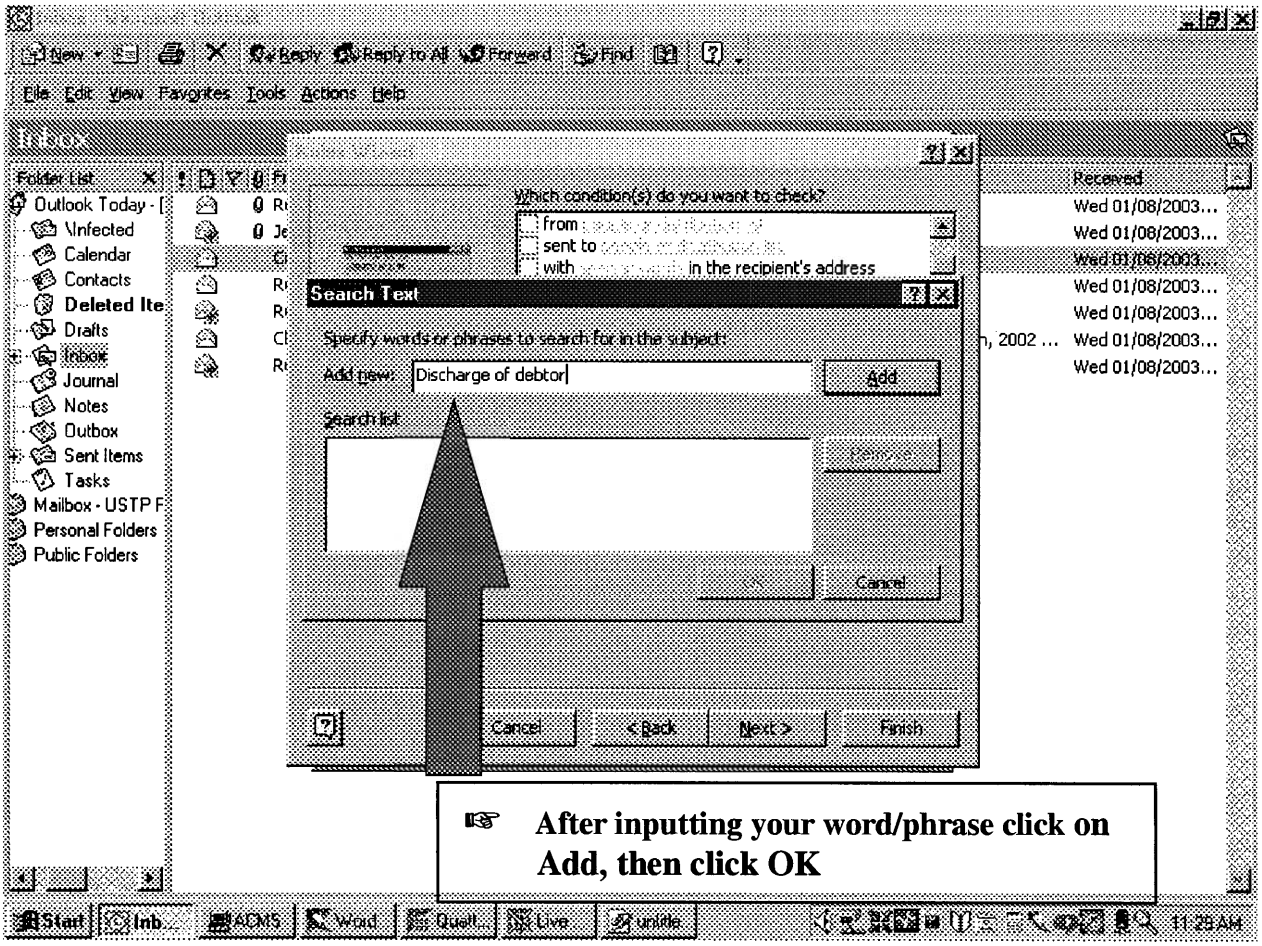


☞ In the Search Tool, Specify words or phrases to search for in the subject: in the Add new: input the word or words you would like to use this rule for. It is recommended that you DO NOT use Case Numbers as a search tool.

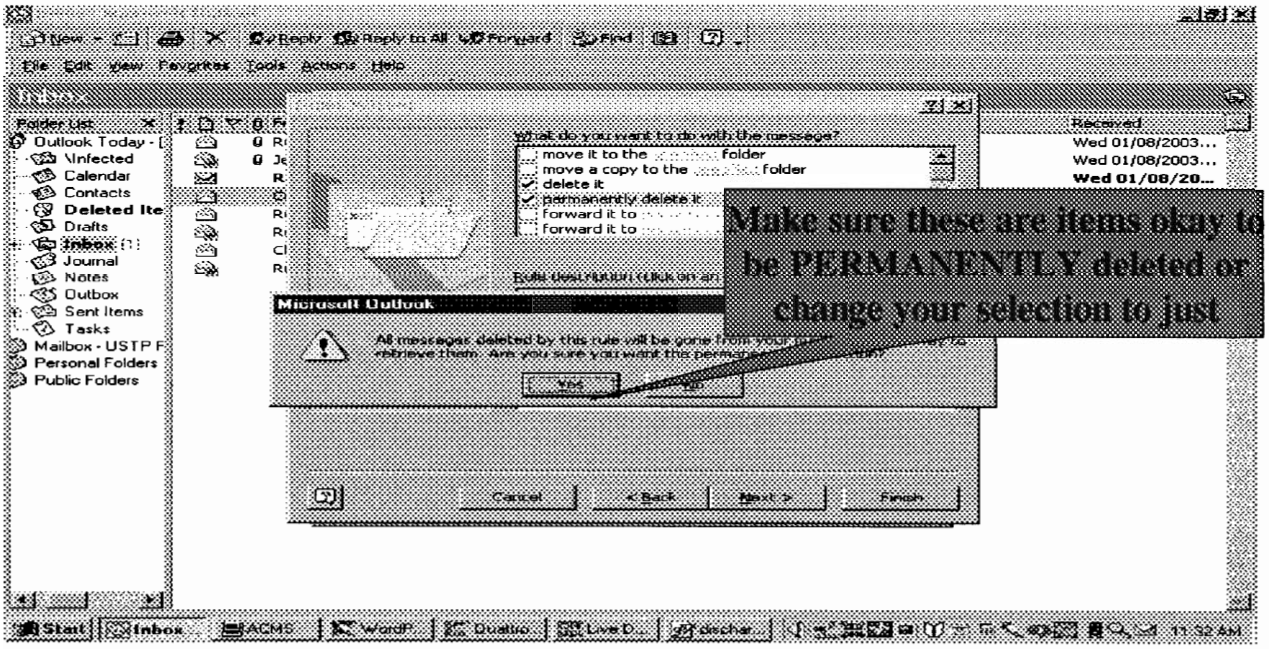
EXAMPLE OF RULE AUTOMATICALLY DELETING MAIL

For this example we will assume that if a Discharge of Debtor notice is received electronically we would like our computer to automatically delete it. To do this:

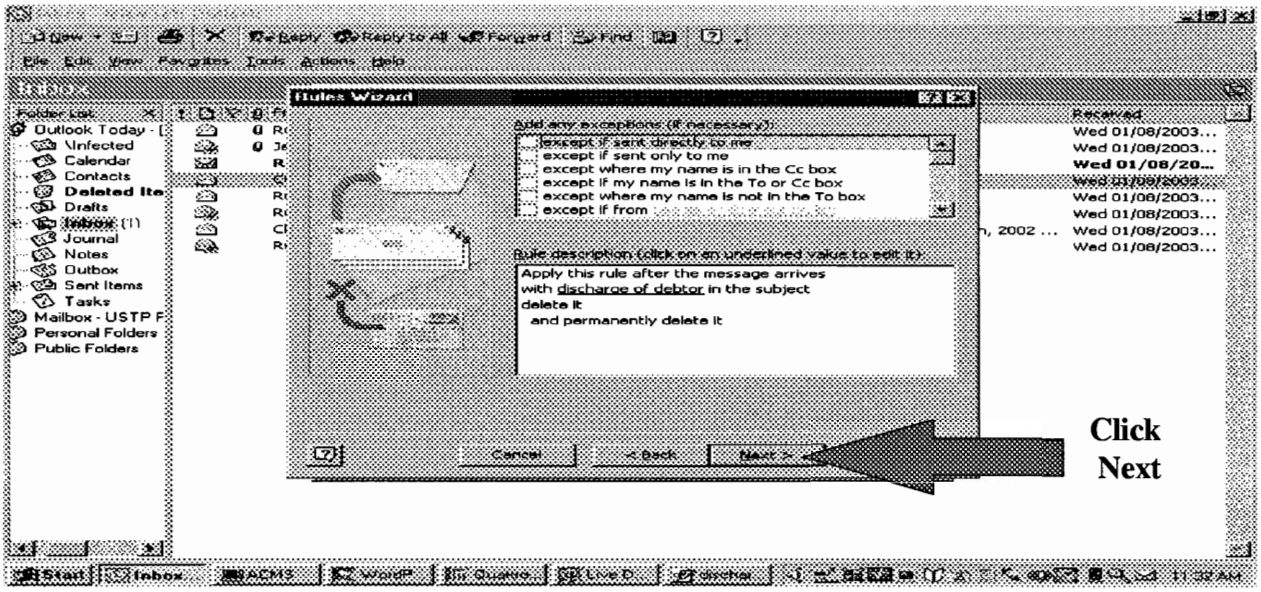
Follow the previous steps on pages 8 to 10. On page 10 where you asked to insert a specific word or phrase input the phrase: Discharge of Debtor



☞ **At the "What do you want to do with this message?" screen, highlight and select Delete it, you can also select Permanently Delete.**

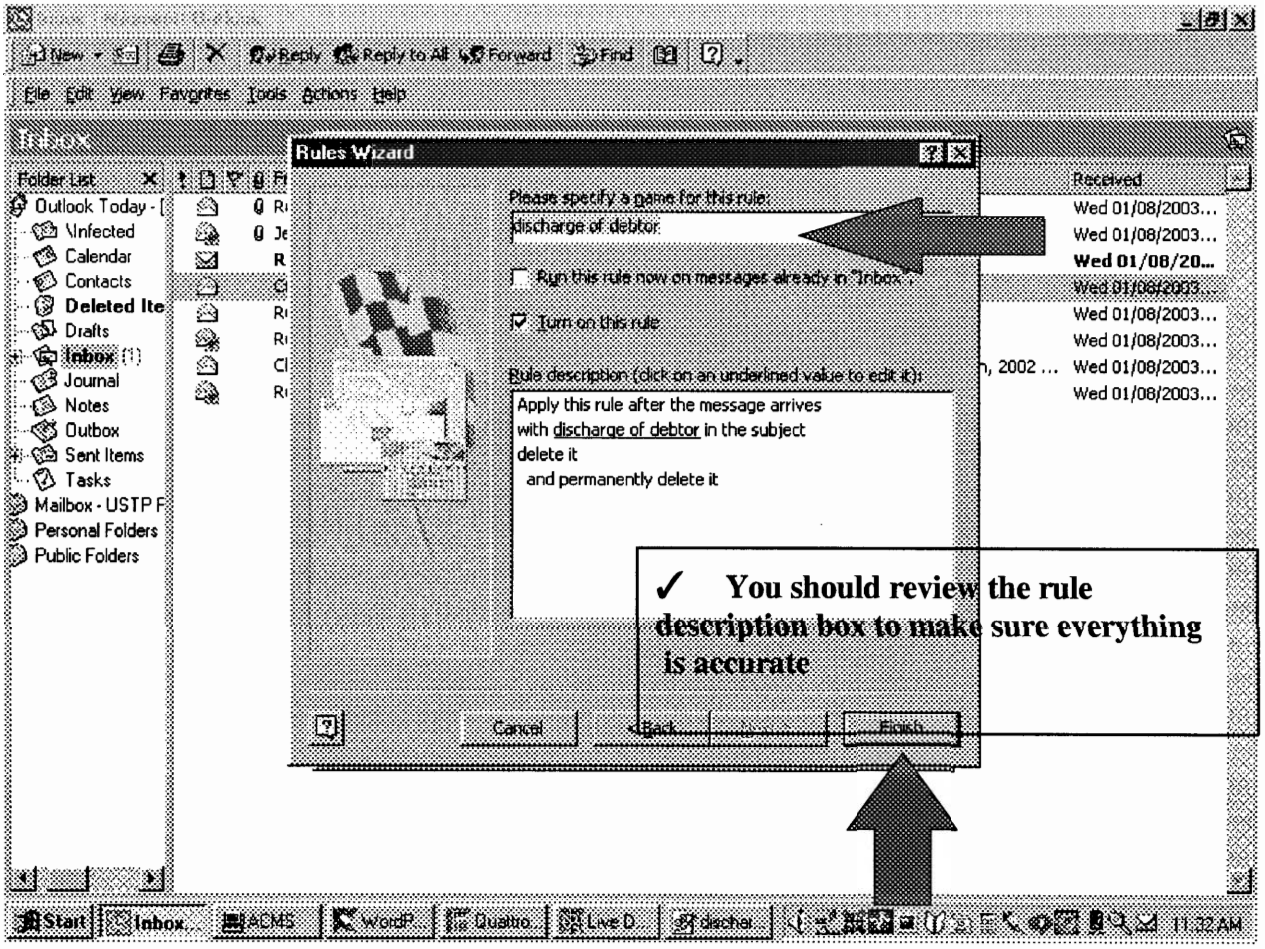


☞**If okay to permanently delete the items, click on Yes and then click on Next.**



☞**Most of the time there will be no exceptions, if one applies select it. If no exceptions apply, click Next.**

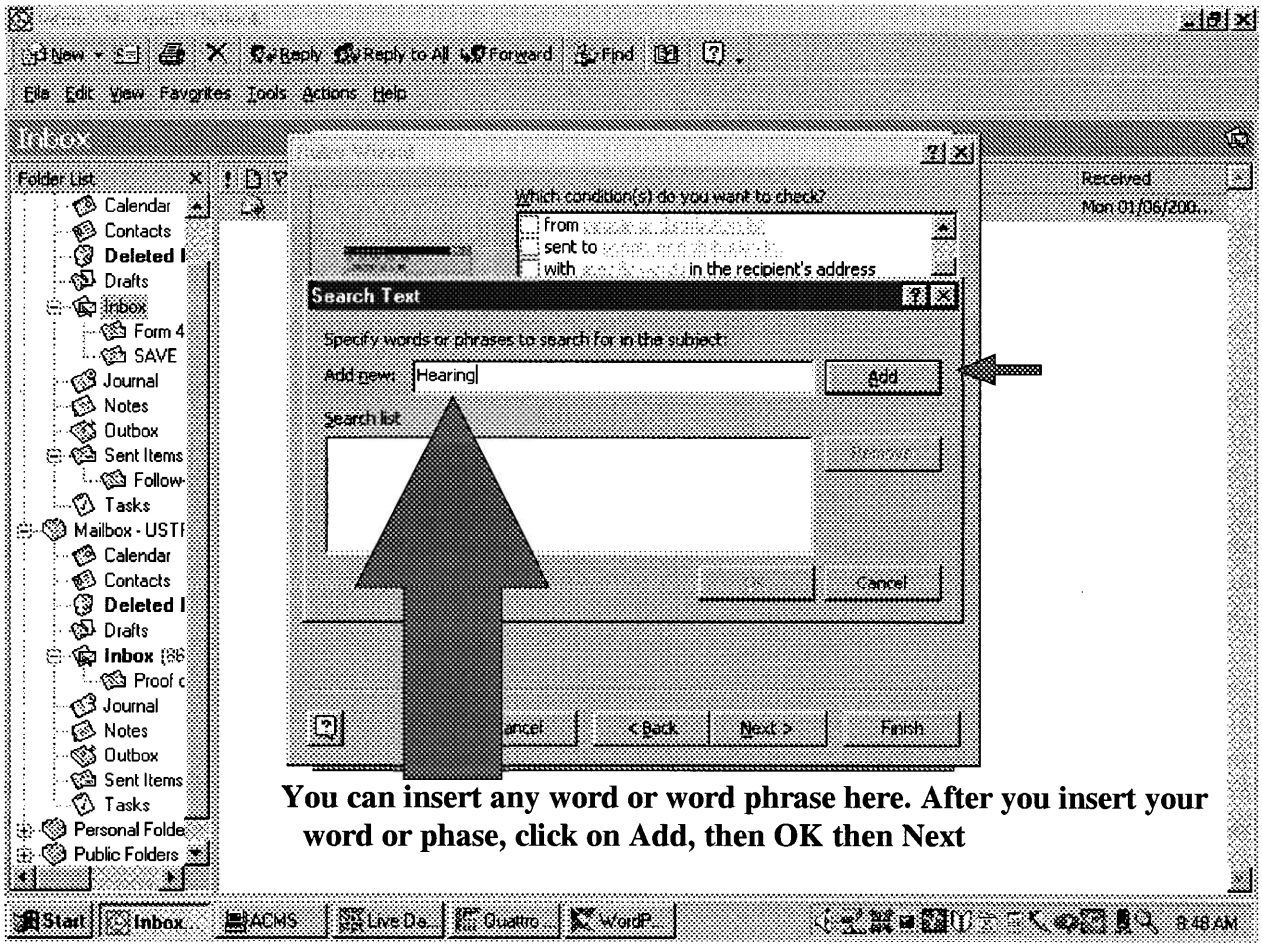
At the next screen, please specify a name for this rule. The shorter the name, the better. We will simply call this rule, Discharge of Debtor. After you fill in the name of the rule, click on Finish.



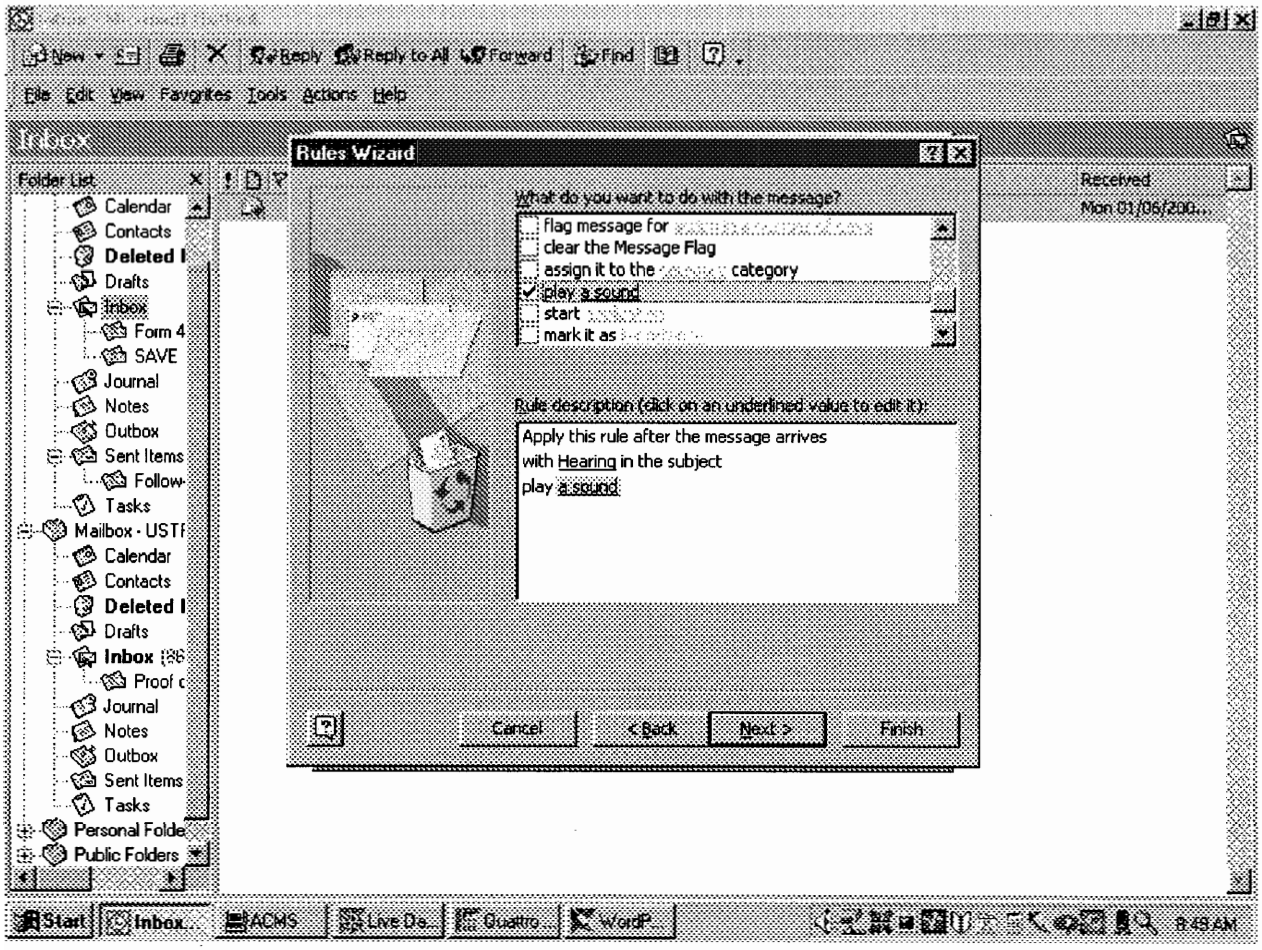
EXAMPLE OF RULE WITH A SOUND NOTIFICATION

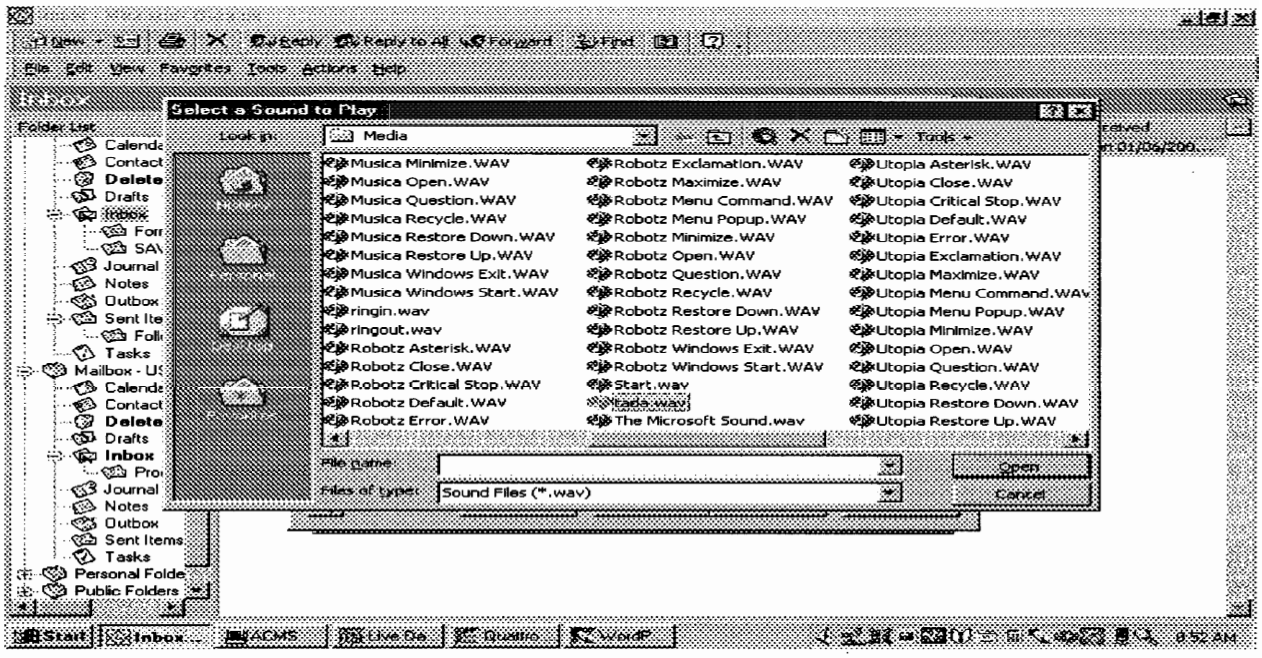
For this example we will assume that if a Hearing notice is received electronically we would like our computer to notify us by making a specific sound. To do this:

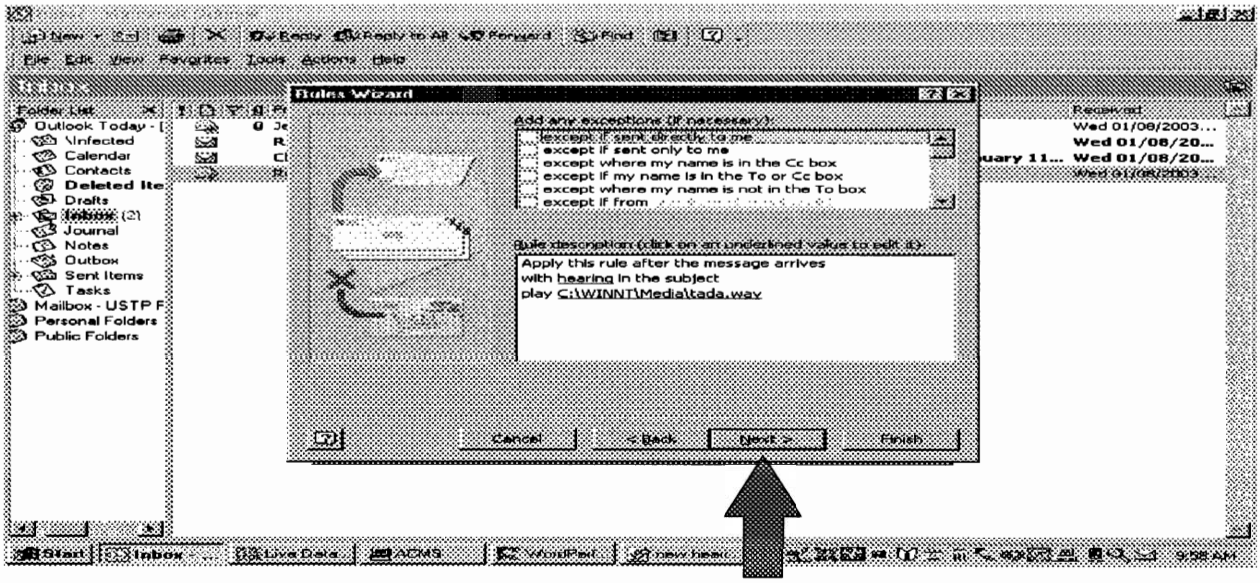
Follow the previous steps on pages _8_ to _10_. On page _10_ where you are asked to insert a specific word or phrase we will input the word Hearing.



☞ **At the "What do you want to do with the message?" screen highlight and select "Play a sound"**

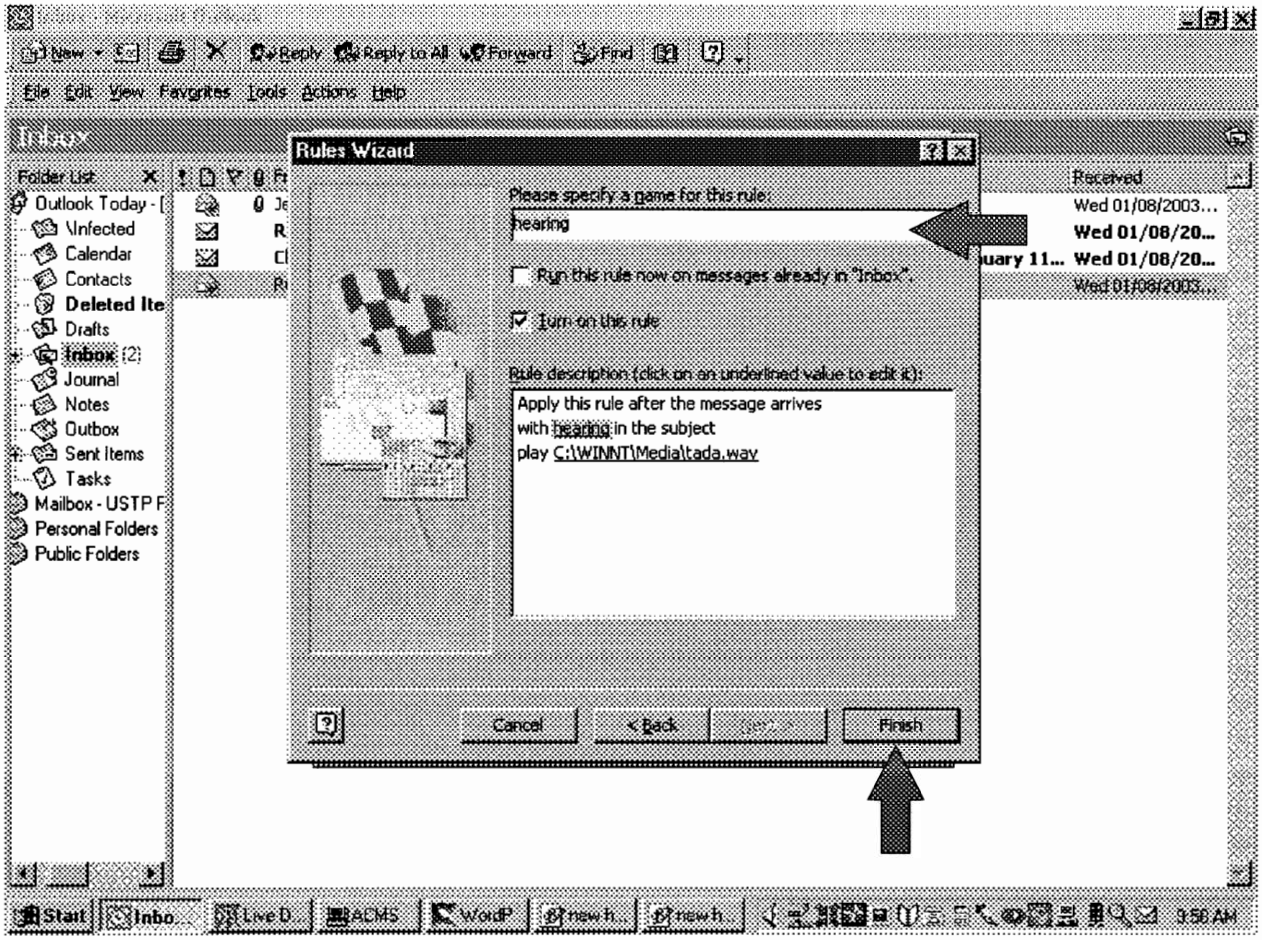






☞**After you have selected your sound, click Next. At the "add any exceptions" screen, apply if appropriate, or click Next. (Most of the time there will be No exceptions.**

At the next screen, please specify a name for this rule. The shorter the better. We will simply name our rule Hearing. Then click Finish.

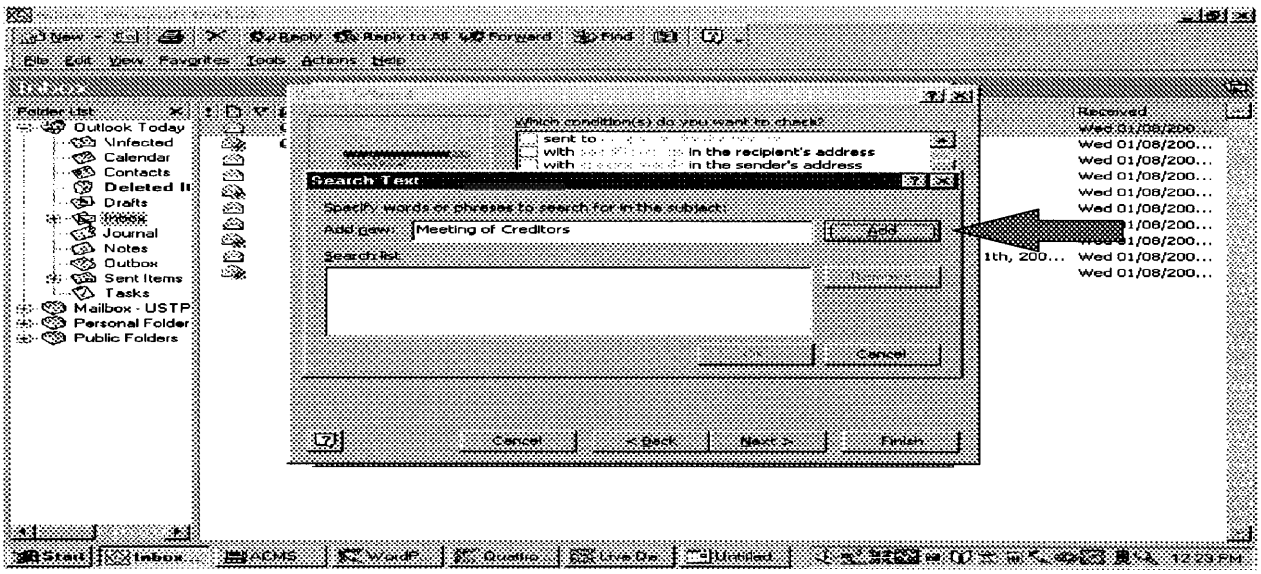


With this rule whenever you receive a piece of electronic mail into your ECF mailbox that has the word "Hearing" in the subject the sound "tada" will play.

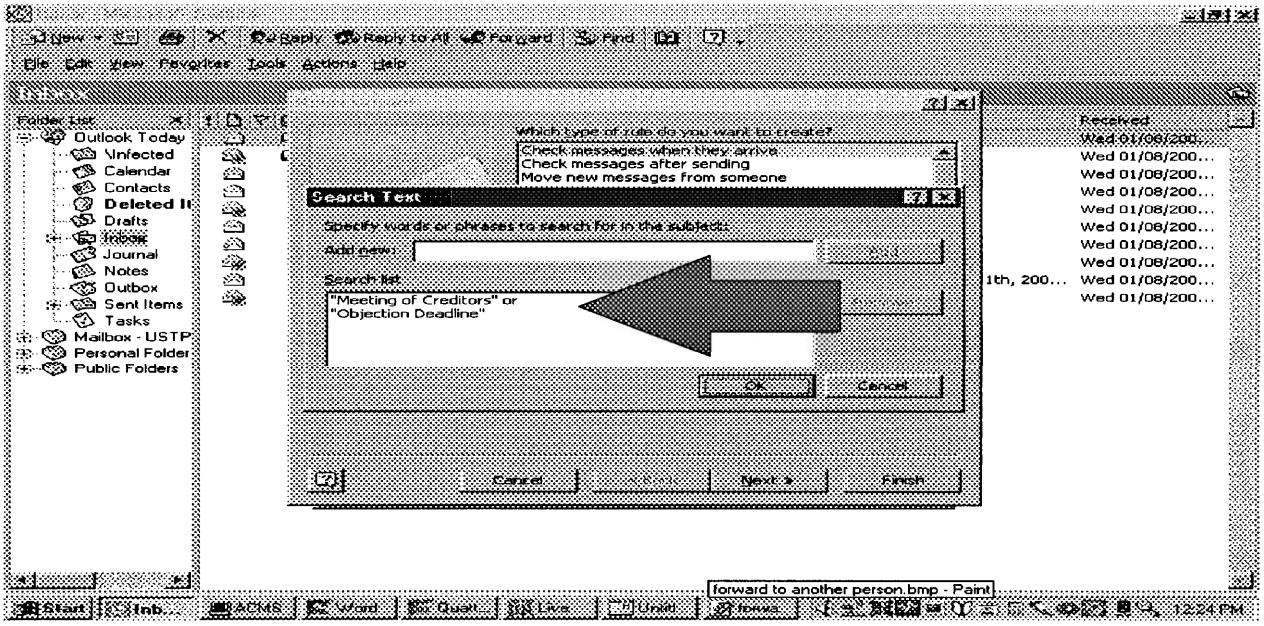
EXAMPLE OF RULE AUTOMATICALLY FORWARDING E-MAIL TO ANOTHER PERSON

For this example, we will assume that if a "Section 341 Meeting Notice" is electronically received we would like to forward the complete e-mail to another person for calendering. To do this:

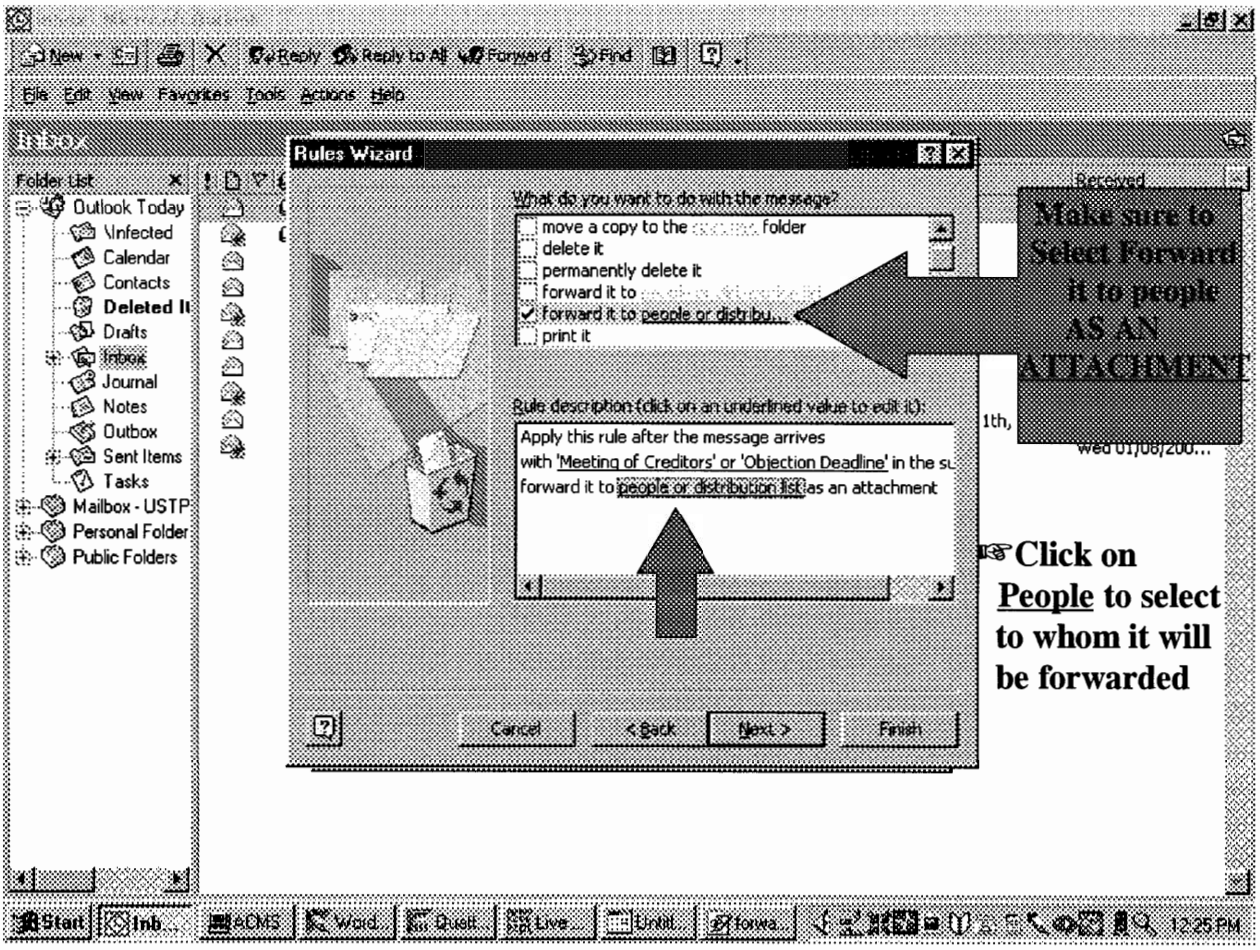
Follow the previous steps on pages 8 to 10. On page 10 where you are asked to insert a specific word or phrase we will input the word or word phrase: Meeting of Creditors.



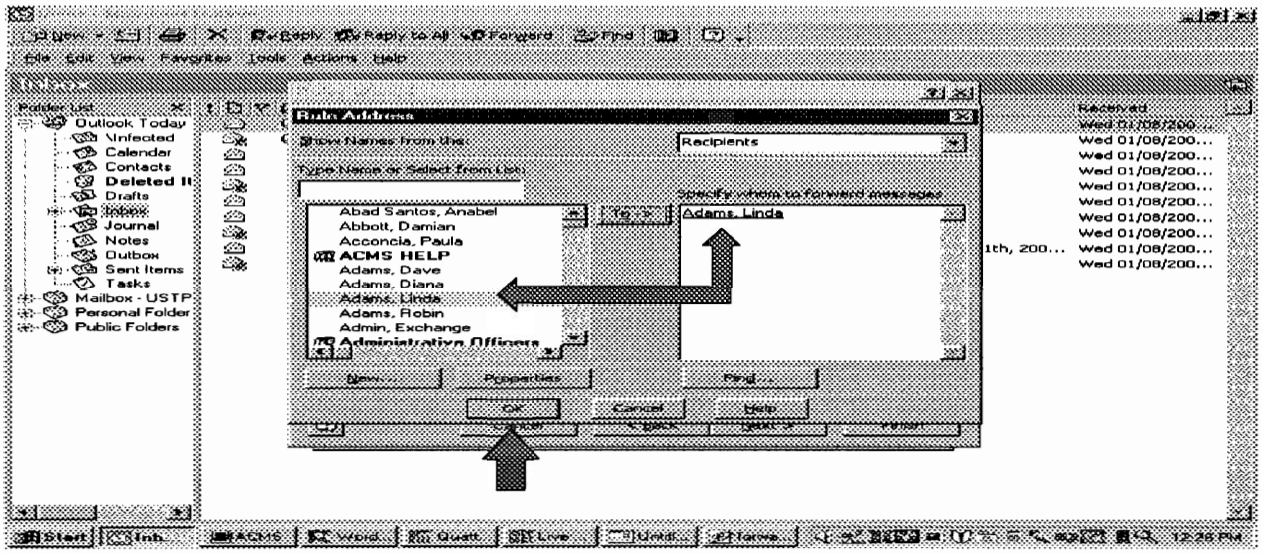
☞ **You can use one rule for multiple scenarios. To do this just click the Add button and add another word or word phrase. After you have completed them, click OK then click Next.**



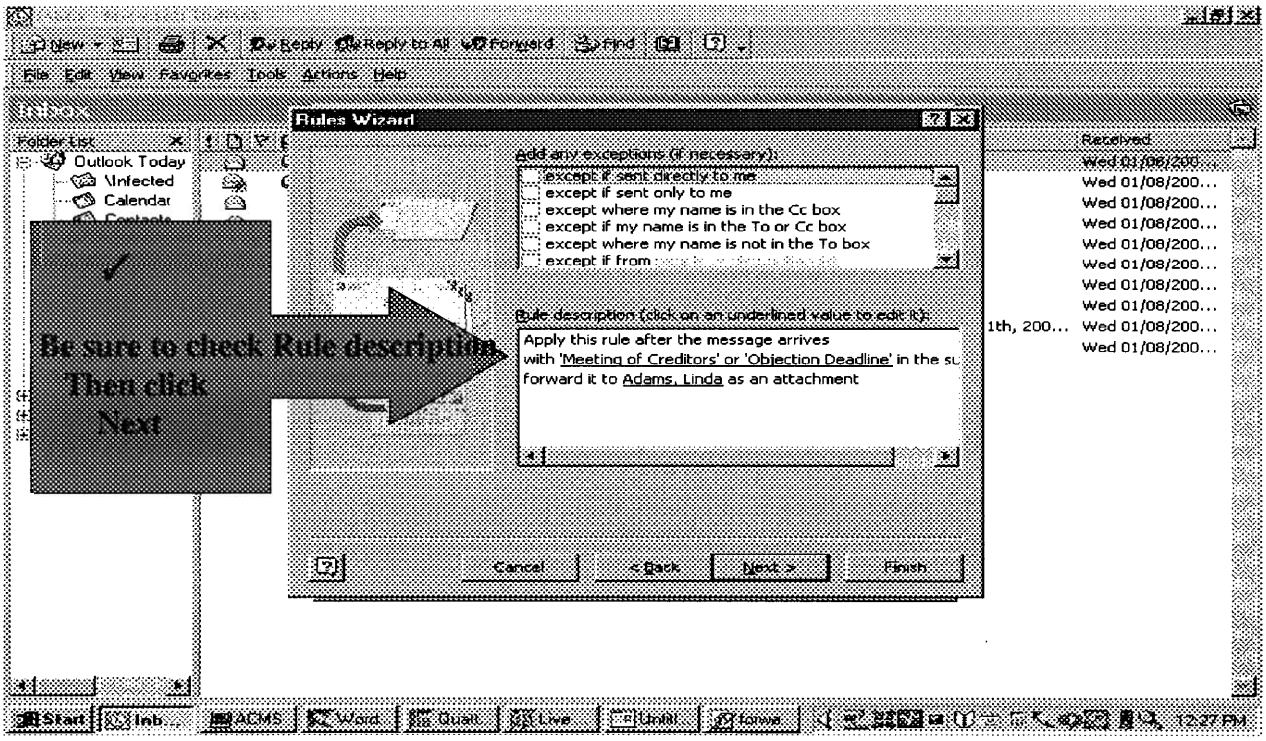
☞ **At the "what do you want to do with the message?" screen highlight and select the Forward as an attachment. In order for the receiving party you MUST forward the e-mail as attachment, just forwarding the e-mail will break the link to Pacer and the forwarded document will not be there for the individual to review.**



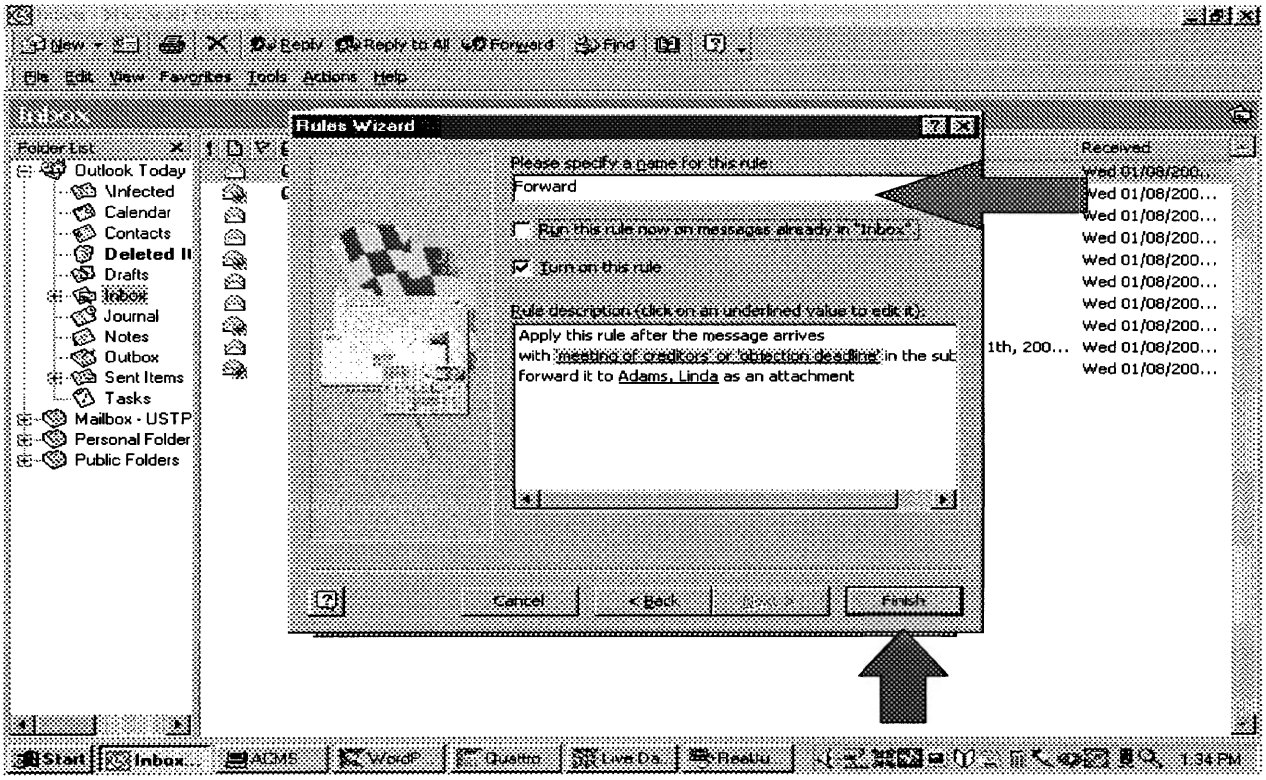
☞**From your distribution list, select the individual and click OK**



☞ **At the Add any exceptions if applicable, otherwise, check the rule description for accuracy and click Next.**



☞ **At the next screen specify a name for this rule. We will call our example rule: Forward. Click Finish.**

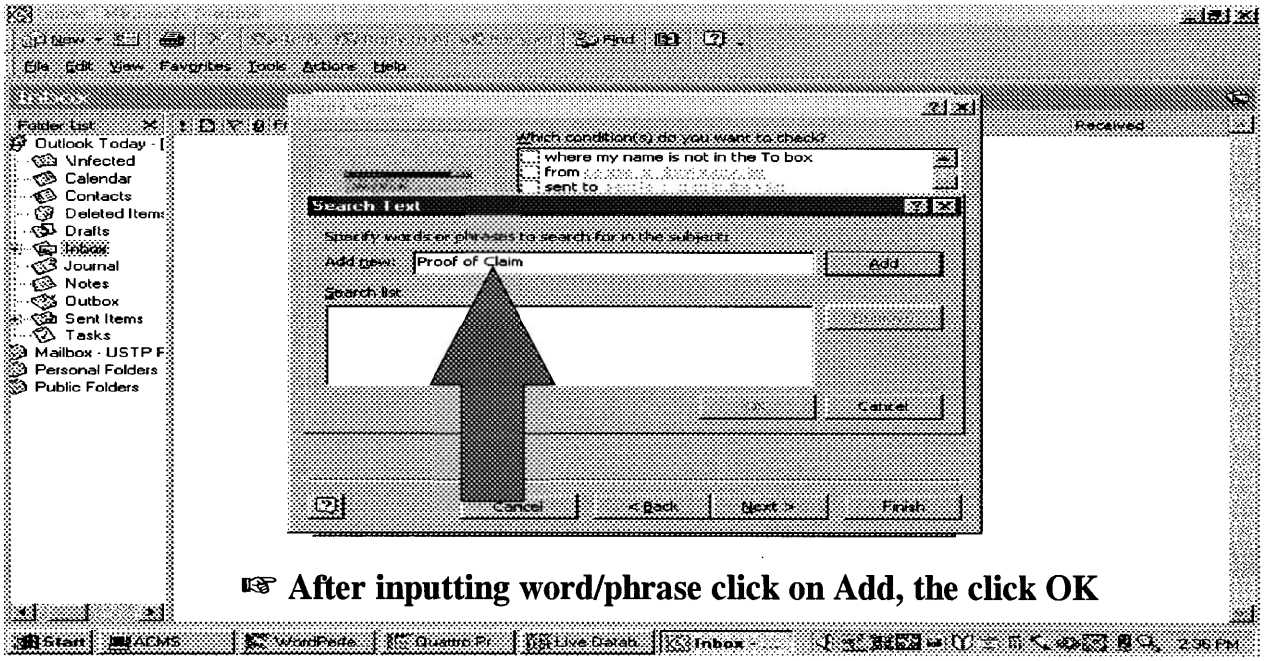


EXAMPLE OF RULE FORWARDING SPECIFIC E-MAIL TO ANOTHER FOLDER

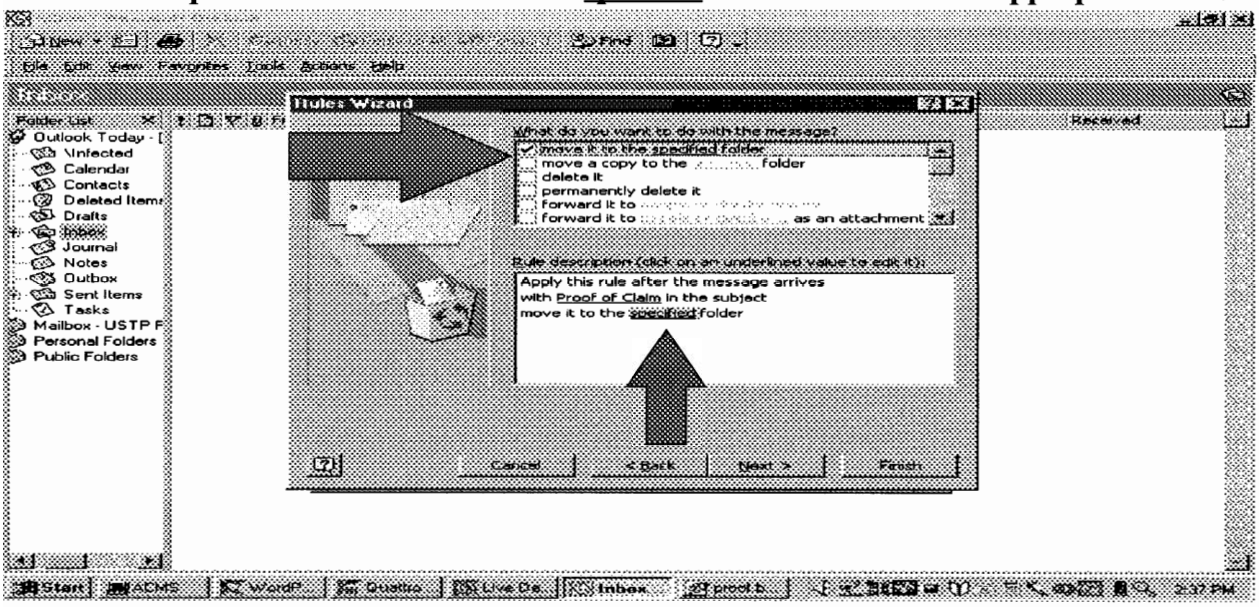
If you have not already done so, you will need to make another folder under your ECF e-mail inbox. This process is shown on pages 4 to 5.

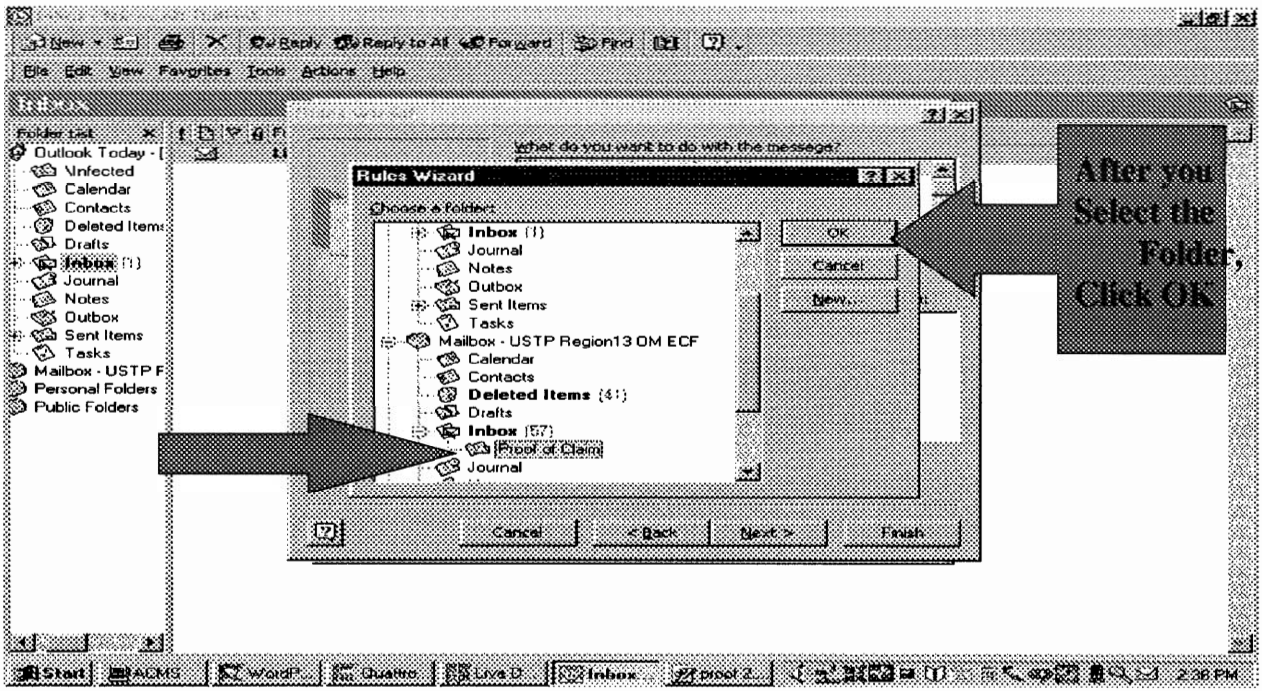
For this example we will assume that if a Proof of Claim is received through our ecf e-mail inbox we would like our computer to automatically move the e-mail to a special folder we have created called "Proof of Claim" so that it can be looked at on a later date.

Follow the previous steps on pages 8 to 10. On page 10 where you are asked to insert a specific word or phrase in the phrase: Proof of Claim.

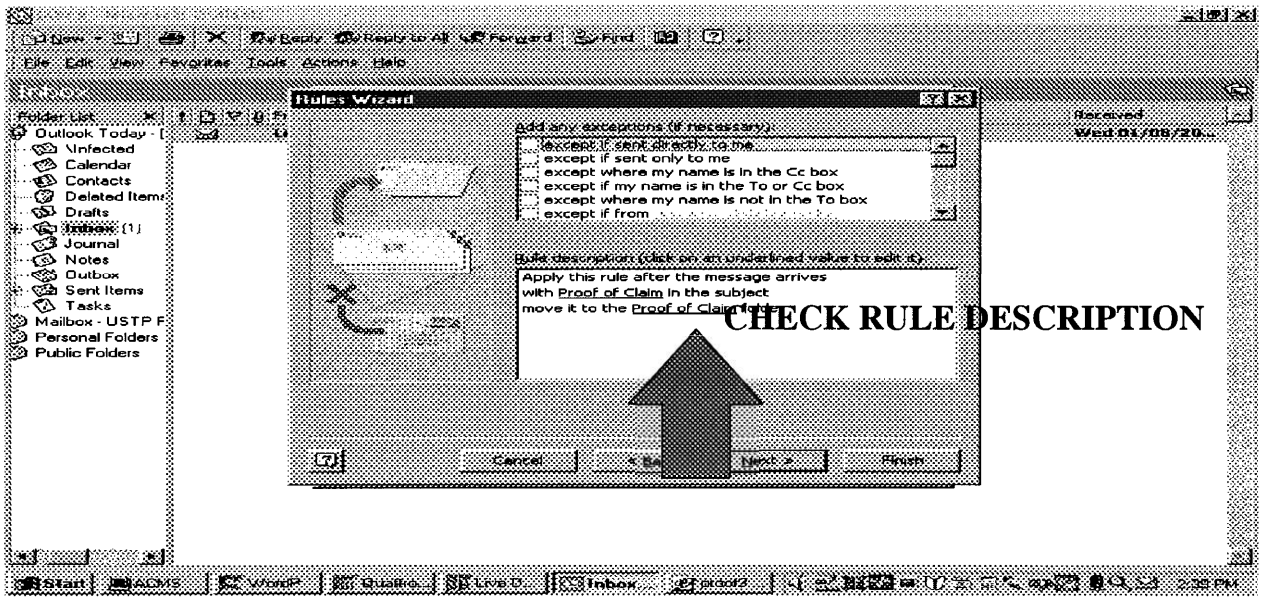


☞**At the "what do you want to do with this message?" screen, highlight and select the Move to the specified folder. Click on the <u>specified</u> folder and select the appropriate folder.**

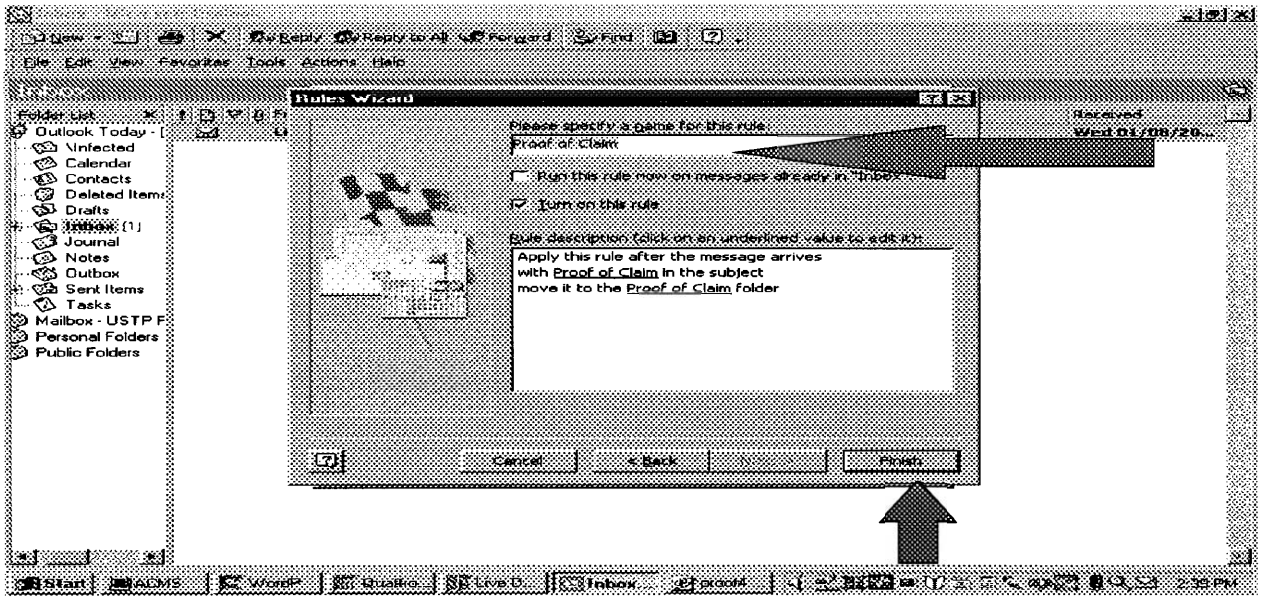




☞**Add any exceptions if applicable, otherwise, check the rule description and click Next.**



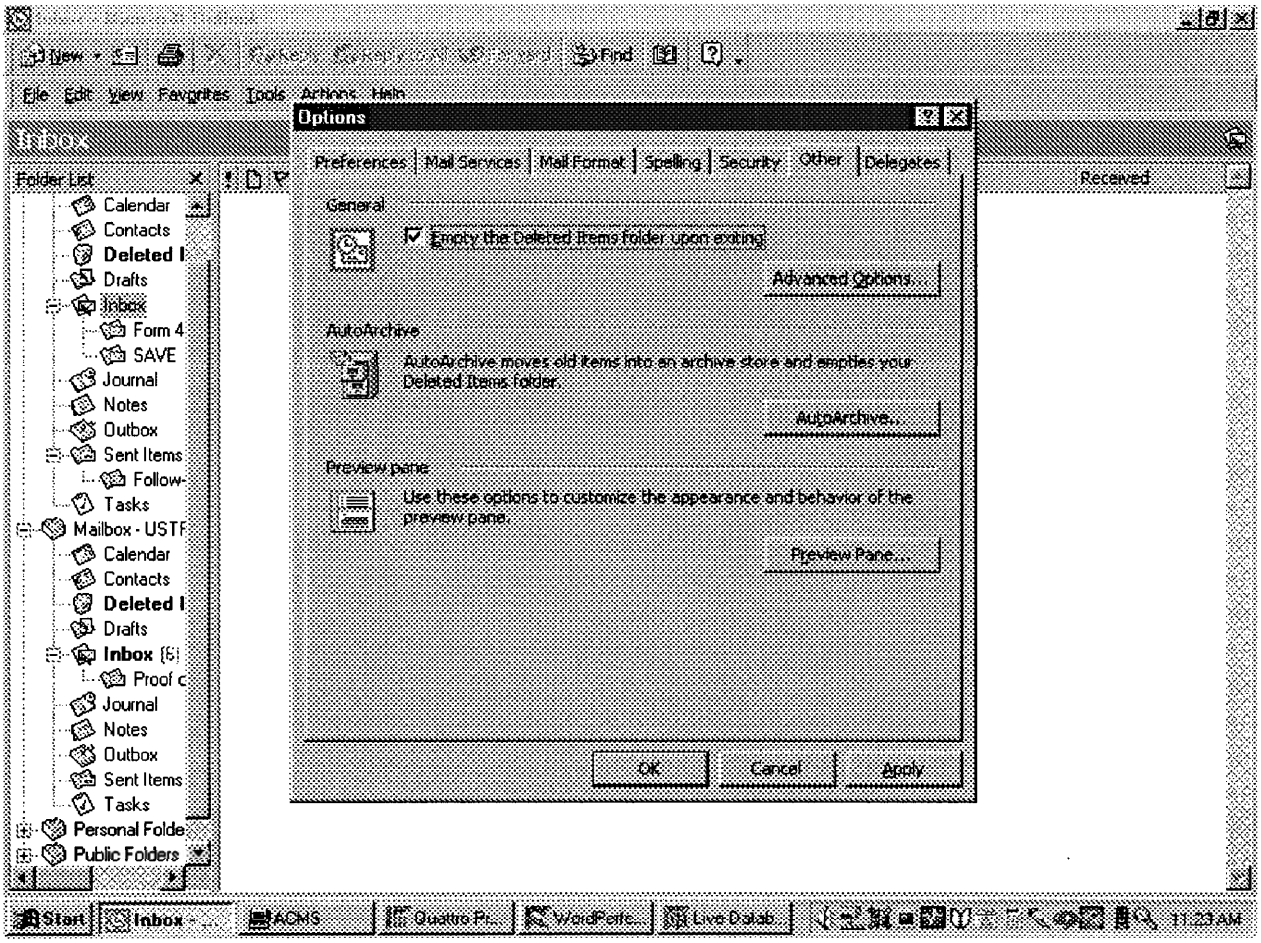
☞**At the next screen specify a name for this rule. We will call our example rule: Proof of Claim. Then click on Finish.**



HOW TO AUTOMATICALLY DELETE THE DELETED ITEMS FOLDER

Once an item is sent to the delete box you still have access to it until you permanently delete it from the delete box. Your e-mail gives you the option to automatically delete your deleted items at the end of the day or when you close your e-mail. If you do not need an item it is important to delete it as the e-mail storage capacity is limited. To set up your e-mail to automatically delete the deleted items at sessions end:

Go into your e-mail, select Tools, select Options. Once in the Options screen, click on the Other tab. Under General place a check mark in the box next to "Empty the Deleted Items Folder upon exiting". Click on Apply and the click on OK.



FORM D

UNITED STATES BANKRUPTCY COURT
FOR THE DISTRICT OF NEBRASKA

IN THE MATTER OF:	)	
	)	CASE NO.
	)	
	)	Chapter
	)	
DEBTOR(S)	)	

REQUEST TO DISCONTINUE SERVICE OF NOTICES

PLEASE TAKE NOTICE that the undersigned appearing as counsel for _____ _____, creditor and party-in-interest in the above-captioned matter, requests to be administratively terminated in this case for the purpose of receiving notices. The undersigned no longer wishes to receive notices from the Court, either by electronic form or first class mail.

CREDITOR:

BY: _____

CERTIFICATE OF SERVICE

I, _____, hereby certify on _____, a copy of the foregoing Request to Discontinue Service of Notices was served upon the parties identified below by first class U.S. mail, properly addressed and postage prepaid:

_____