

LONG RANGE PLAN ACCOMPLISHMENTS

CASE MANAGEMENT		
Obj.#	Objective	Accomplishments/Status
1.	Expand site-based pro bono assistance program.	With the opening of the Pro Se Clinic at the Riverside Division in 2011, all five divisions now have onsite self-help desks to provide pro se parties with free legal information, reference materials, and pro bono support. Goal accomplished.
2.	Encourage increased use of telephonic and video appearances where appropriate.	Judges Clarkson and Wallace hear Riverside Division cases assigned to them from their Santa Ana Division courtrooms by videoconference. Chief Judge Peter H. Carroll hears Northern Division cases from his Los Angeles Division courtroom. In past years, Judges Bluebond, Bufford, E. Carroll, Donovan, and Neiter were assigned a portion of the Riverside Division case filings that they heard by videoconference from their Los Angeles Division courtrooms. In 2014, Judge Bluebond will pilot a new feature available in the CourtCall telephonic appearance system that will permit parties with sufficient bandwidth and a webcam to appear by video in select hearings. Parties currently use CourtCall to appear at hearings by telephone instead of coming to the court in person.
3.	Encourage judges to serve in a different division at least once a year.	No updates to report.
4.	Facilitate the judges' ability to prepare more orders.	The mobile version of Lodged Order Upload (LOU-e), which allows judges to remotely access and approve orders, was implemented in August 2011. The Lodged Order Upload (LOU) program was launched in September 2007. Multiple enhancements were implemented in CIAO! The Clerk's Office continues to explore ways to allow remote processing of orders through smartphones and mobile devices.
5.	Reduce Clerk's Office labor component for all case processing and case management functions.	<p>In 2013, the Clerk's Office automated case closing of chapter 7 cases and issuance of a summons or alias summons in an adversary proceeding. The Clerk's Office also developed an online process for requesting transcripts and streamlined the process for providing recordings to the transcription agencies. The Clerk's Office had previously automated the discharge of eligible chapter 7 cases. The LBRs were revised in 2013 to eliminate the need for a Notice of Entered Order and Service List (NOE) on all orders.</p> <p>In 2010, the Court commenced a program to acknowledge staff members who propose ideas for improving the Court's efficiency. In 2013, the Board of Judges streamlined and standardized the procedures for handling case commencement deficiencies throughout the district to significantly reduce labor for chambers and Clerk's Office staff. The Clerk's Office is currently modifying CM/ECF to incorporate the new procedures.</p> <p>The Clerk's Office continues to expand the use of automation for dismissal of chapter 7 and chapter 13 cases, and the closing of chapter 13 cases with completion expected in 2014.</p>

CASE MANAGEMENT

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5.		<p>Lodged Order Upload (LOU) program launched in September 2007 and is widely used. ECF usage became mandatory on April 1, 2007. High-volume claim filers registered to use ECF. Quality control tracking program developed to identify common errors and users with high error rates to target training/remedial action. Online training modules were developed to replace CM/ECF classroom training. The Clerk's Office also performs automatic dismissal of deficient cases to reduce referrals to the judges. The Court adopted district-wide procedures for the electronic service of adequate protection orders and relief from stay orders.</p> <p>Headers no longer need to be inserted for the Proof of Service (POS), greatly reducing staff labor. Orders are now much easier for attorneys to prepare, reducing time spent by Court staff answering questions, such as how to add POS and NOE pages, and also time spent by staff fixing orders where the formatting was unacceptable due to the way in which the POS and NOE were imported into the order.</p>
6.	Standardize docket entries.	Trained registered ECF attorneys to use correct docket codes. Discontinued routine docketing of unused orders. Quality control tracking program developed to identify common errors and users with high error rates to target training/remedial action. Online training modules developed to target common errors/inconsistencies.
7.	Explore the ability to process documents while working at an alternate location. (See also Human Resources Objective #1)	Telework program in place. Clerk's Office staff at divisions also use electronic systems to assist each other as needed. In 2013, the Case Management Assist (CMA) program was implemented in all five divisions, enabling the Clerk's Office to automatically distribute and reassign work to Operations staff anywhere in the district including telework.
8.	Facilitate, as appropriate, the administration of small cases.	Individual Chapter 11 Task Force developed proposed forms for individual chapter 11 cases. The Court is collaborating with the newly formed Bar Rules Advisory Group (BRAG) to revise and improve the forms.

COMMUNITY OUTREACH

Obj.#	Objective	Accomplishments/Status
1.	Expand relations with minority bar associations.	The Court has regular interaction with local bar associations in the district that have diverse memberships. In December 2013, the South Asian Bar Association (SABA) sponsored and participated in the Federal Court Power Lunch which hosted over 50 students from Whitney High School.
2.	Obtain funding for foreign language interpretation and translation services.	The Court's FAQs were translated into Spanish and posted on the Court's website in a project coordinated by the Debtor Assistance Project and funded by the Attorney Admissions Fund.
3.	Encourage effective cross-cultural communication in the courtroom.	<p>The Court's FAQs were translated into Spanish and posted on the Court's website in a project coordinated by the Debtor Assistance Project and funded by the Attorney Admissions Fund.</p> <p>In January 2010, the Court and Public Counsel initiated steps to partner with local colleges to have volunteer Spanish translation services available at reaffirmation hearings. The project, now spearheaded by Public Counsel, offers students from CSULA and the Northridge Institute the opportunity to volunteer their translation services in the Los Angeles and San Fernando Valley Divisions.</p>
4.	Create bankruptcy education programs.	<p>In 2013, the Court applied and was selected to host a UCLA Ann C. Rosenfield Fellow to study issues related to aging, finances and bankruptcy and provide assistance to those facing these issues. The Fellowship, funded by the Ann C. Rosenfield Fund, is offered by the UCLA Luskin School of Public Affairs and is a high-level apprenticeship program for graduate students. The Court selected Julie Polluck as the UCLA Ann C. Rosefield Fellow. During her term in 2013, Ms. Pollock developed a "Bankruptcy Timeline" which lists all of the major events and time requirements for a chapter 7 bankruptcy case, and began the blog "Bankruptcy After 55," which discusses the challenges older Americans face related to finances, credit, retirement, illness and more. Both items have been added to the Court's website. Additionally, Ms. Pollock has presented her work during Board of Judges meetings, including articles that describe the leading research on the aging bankruptcy population, and began coordinating a panel of experts for a financial elder abuse event to be held in early 2014. The event will examine symptoms of the elderly that make these individuals the target of financial elder abuse, as well as describe the scams for which victims fall prey, and resources that may provide assistance to those facing these issues.</p> <p>The Court partnered with Public Counsel to create a video designed to assist self-represented debtors with completing a chapter 7 petition. The video is now hosted on Public Counsel's YouTube channel and is linked to the Court's website.</p> <p>In 2013, Judge Klein hosted an externship panel discussion for law students at Loyola Law School. During the program, students learned the value of an externship with the federal courts.</p> <p>During 2013, bankruptcy judges and state court judges provided training for each other on several core issues.</p>

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4.	Create bankruptcy education programs. (cont.)	<p>In 2011, the Clerk's Office initiated its "Raising the Bar" series of bankruptcy education programs conducted for Court staff by subject matter experts from the local bar. Raising the Bar programs were videoconferenced to all five divisions and the series was taped for future use. The Education Committee continues to arrange bankruptcy education programs for the off-site BOJ Seminar, other quarterly BOJ meetings, and extern/law clerk orientation.</p> <p>Sponsored by the chambers of Judge Saltzman, the Court continues to offer three district-wide training sessions annually to incoming law clerks and externs, in the spring, summer, and fall. The one-day session is conducted by bankruptcy judges and guest speakers.</p>
5.	Create pamphlets in Spanish available for the public on the nature of chapters 7, 11, and 13.	<p>A Spanish translation of the Court's FAQs was posted on the Court's website in 2009, and revisited to enter minor updates at the end of 2013. Additionally, the Court has pamphlets created by the California Bar and FTC, as well as its self-help desk information in Spanish. Finally, a Spanish translation of the Court's new Bankruptcy Timeline link on the Court website is under construction and expected in early 2014.</p>
6.	Review all information available to the public and revise it to accord with changes in the law.	<p>The Court's website was redesigned in 2012 with input from the bar and general public. The website now has a more relevant and user-friendly format as well as a powerful search feature.</p>
7.	Provide public education on issues such as separation of powers, judicial independence, rule of law, and stare decisis.	<p>The Court sponsored three educational programs designed for high school students in 2013. Students who participate in the programs meet with judges and attorneys to learn about the law and legal careers. More than 80 students and 60 volunteer judges and attorneys participated in the programs.</p> <p>Judges frequently participate in panel discussions and programs sponsored by universities, law schools, bar associations, etc.</p>
8.	Update the Court's website periodically to keep it current and user-friendly.	<p>In 2013, the Court continued to add new and relevant content to the website, including educational materials for self-represented parties.</p> <p>The Court launched its new website in October 2012. The website offers users a better experience because the information is well organized, includes better navigation, and is easily searched. For those with visual impairments and literacy difficulties, the new website offers a read-aloud service via BrowseAloud. The Court has also incorporated a translation service on the website that provides translations between English and dozens of different languages.</p> <p>During 2012, most Court forms were revised so they can now be filled in and saved without expensive applications. The remaining Court forms were updated in 2013. The Court's website is updated regularly to reflect current Court information and processes, public notices, judges' practices, etc.</p>

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9.	Encourage legal assistance from pro bono attorneys for parties who cannot afford an attorney. (See also Facilities and Security Objective #7)	<p>In 2013, the Court piloted a program to enable select pro bono attorneys to use ECF for filing of petitions with fee waiver applications. This was done to make it easier for pro bono attorneys to volunteer their services.</p> <p>In 2013, the Court participated in the National Celebrate Pro Bono week by hosting a reception in Los Angeles. In addition, the Court recognized each of the more than 300 volunteers by presenting them with certificates of appreciation.</p> <p>The Court collaborates with the local bar to provide free and low-cost legal assistance to unrepresented parties through the Debtor Assistance Project. The Court now has onsite self-help clinics at all five divisions that provide legal information, reference material, and pro bono support.</p>
10.	Make electronic filing more accessible to the public.	<p>The Court participated in the design and testing of a national pilot program known as eSR (Electronic Self-Representation), which will enable self-represented filers to electronically file petitions. In 2014, the Court will make it available at its self-help clinic in Los Angeles, where filers will have access to pro bono attorneys. Numerous ECF training sessions were provided for members of the local and national bar. Online training modules replaced CM/ECF classroom training for new attorneys. Filing Agent was made available in 2012 to enable select attorney staff members to use CM/ECF simultaneously with their own IDs/passwords.</p>
11.	Publicize appropriate means to communicate suggestions for Court rules and procedures.	<p>In 2013, the Court developed a Bar Rules Advisory Group (BRAG) to obtain input from a wide variety of attorneys regarding forms and processes. During the year, the BRAG completed a comprehensive review of the Court's relief from stay forms that will become available in 2014.</p> <p>In 2011, the Bar Advisory Board provided extensive feedback on the Court's new website. Two members of the board volunteered to be on the IT Committee and made valuable recommendations on operational and procedural matters.</p> <p>In 2009, the Court initiated the Bar Advisory Board. This board, comprised of representatives from local bar associations that provide feedback and suggestions to the Court, is a useful vehicle for communication between the Court and the bar.</p> <p>Judges and executive management attend local bar functions to maintain open communication. The Court continues to seek input from the public on local rules, requesting comments through public notices and the <i>Court News</i> publication.</p>

FACILITIES AND SECURITY

Obj.#	Objective	Accomplishments/Status
1.	Review divisional organization of the Court	On April 1, 2011, the Ninth Circuit approved a five-year extension on the Court's lease on the Northern Division. Following consideration of a variety of space options, the Court negotiated a new lease for the San Fernando Valley Division, effective November 13, 2011.
2.	Create a plan for court operations in the event of a natural disaster or other catastrophe that affects all or substantially portions of the district.	<p>In 2013, the Court began discussions with the District Court's emergency communication personnel to exchange best practices and begin a merger of the two Emergency Notification Systems (ENS) to save expenses and improve the speed of emergency information.</p> <p>Additionally, the agencies agreed to exchange various services such as training, continuity planning and emergency preparedness activities to offset funding for the appointment of a district-wide Emergency Preparedness and Security Officer. These measures were a part of a long-term plan designed to save money and improve the efficiency of information sharing and emergency response.</p> <p>Court COOP personnel joined the Greater Los Angeles Area Federal Executive Board (GLAFEB) Continuity Working Group (CWG) Steering Committee for Calendar Years 2013 thru 2015.</p> <p>In August of 2013, Court COOP personnel attended the National Emergency Preparedness Workshop in Washington D.C. This workshop was the first step in the creation of a national level program for all judicial agencies designed to facilitate the creation of various emergency management programs through the development of tools, databases and resources for emergency management practitioners across the judiciary.</p> <p>The process of revising the Courts COOP program also included the developed a comprehensive Test, Training and Exercise or TT&E plan. This plan was intended to ensure the steady enhancement Court personnel's knowledge of COOP concepts and expectations, as well as their individual role in the overall plan. A regular schedule of test and exercises will ensure the Court's COOP program grows with the Court.</p>
3.	Determine the amount of space used by the Court that is necessary to serve the public.	In 2012, the Clerk's Office released 9,725 square feet at the San Fernando Valley Division and 14,000 square feet at the Santa Ana Division. In 2013, the Court volunteered the release of 675 square feet in the Santa Barbara Division.
4.	Establish a "virtual" courtroom system.	<p>Currently, Santa Ana Division Judges Clarkson and Wallace hear Riverside Division cases assigned to them by videoconference between the Riverside and Santa Ana Divisions on a routine basis. Chief Judge Peter H. Carroll began hearing Northern Division matters by video from his Los Angeles Division courtroom.</p> <p>In previous years, Judges Bluebond, Bufford, E. Carroll, Donovan, and Neiter were assigned a portion of the Riverside Division case filings that they heard by videoconference from their Los Angeles Division courtrooms.</p>

FACILITIES AND SECURITY

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5.	Establish or create technology to enable litigants to appear from wherever they are.	<p>Litigants appear telephonically when permitted by judge via CourtCall.</p> <p>Worked with CourtCall and AO to design pilot video appearance project for designated case parties in interest.</p> <p>Santa Ana Division Judges Clarkson and Wallace hear Riverside Division cases assigned to them by video conference between the Riverside and Santa Ana divisions on a routine basis. Chief Judge Peter H. Carroll began to hear Northern Division matters by video from his Los Angeles Division courtroom. In past years, Judges Bluebond, Bufford, E. Carroll, Donovan, and Neiter held routine hearings on Riverside Division cases by video conference from their Los Angeles Division courtrooms.</p> <p>In previous years, Judges Bluebond, Bufford, E. Carroll, Donovan, and Neiter were assigned a portion of the Riverside Division case filings that they heard by videoconference from their Los Angeles Division courtrooms.</p>
6.	Validate efficacy of Continuity of Operations Plan (COOP) on a continuing basis.	<p>The Court's COOP plan is continuously updated to ensure that it adheres to the latest available version/template, and that it reflects the Court's current organizational structure and performance goals.</p> <p>In 2012, the Court continued the COOP revision process, further bolstering the document's relevance to current Court functions and operations. This process is slated to continue as the Court moves to new systems and begins to increase collaboration with other federal agencies. In addition, new training courses were developed to ensure pertinent aspects of COOP are understood by all personnel involved in the Court's COOP program.</p>
7.	Explore providing space in the courthouses for providing pro bono legal assistance. (See also Community Outreach Objective #9)	<p>In 2013, the Northern Division relocated its consumer debt clinic to new office space in the lobby to make it more visible. The new office has a transaction window next to the division's Intake windows. With the opening of the Pro Se Clinic at the Riverside Division in 2011, all five divisions now have onsite self-help desks to provide pro se parties with free legal information, reference material, and pro bono support. The Court also makes rooms available for pro bono attorneys to provide legal advice to pro se debtors prior to Reaffirmation Agreement hearings at the Los Angeles, Santa Ana, Northern and San Fernando Valley Divisions.</p>
8.	Make electronic locks and access to doors, elevators, and locations more universal, and limit physical keys and cipher locks.	<p>Judge Mund's office space in the San Fernando Valley Division was outfitted with a full security package consisting of a monitor, an intercom, and a door release. This package, funded by the U.S. Marshals and installed by UDT, eliminates the need for visitors to use Judge Tighe's chambers entrance. The USMS is also in the process of requesting funding to install card readers at the rear entrance to the courtrooms.</p> <p>In the Los Angeles Division, the Clerk's Office completed installing card readers at the rear door of every bankruptcy courtroom as a security measure. Judges can unlock the rear door to their chambers by using keycard readers.</p> <p>Keycard readers throughout the district are being upgraded for compatibility with smartcards. This upgrade has been completed at the Riverside Division, is nearly completed at the Santa Ana Division, and is on hold at the Los Angeles Division.</p>

HUMAN RESOURCES

Obj.#	Objective	Accomplishments/Status
1.	Evaluate and modify, if necessary, the use of the telework program. (See also Case Management Objective #7).	The Clerk's Office revised its telework program to include additional positions eligible to telework and increased the number of days select operations positions can telework up to three days per week.
2.	Ensure a smooth transition as senior staff members retire.	<p>The Court facilitated the 2012 Workforce Planning training and workshops for its managerial staff in April through August. While Workforce Planning is an ongoing process, this project has enabled court management to address staffing levels in a proactive manner, particularly around re-engineering department structures, competencies, human resources metrics, and succession planning.</p> <p>In addition, educational programs were developed for future leaders and current members of management. The programs focused on leadership, communication, and technical skills. A total of 74 staff members completed these programs.</p>
3.	Recruit and retain a workforce consistent with the court's technology	Due to extensive workforce reductions throughout the year, the Court did not actively recruit staff. However, training and development efforts continued to enhance workforce skills while strengthening the Court's succession planning program.
4.	Enhance training for all staff.	<p>Total in-house training offerings increased by 140 percent from 462 in 2012 to 648 classes in 2013. A total of 4,356 student seats were filled across the five divisions. Classroom training on new desktop applications, such as Microsoft PowerPoint, were offered at all divisions. The Court launched the T minus 15 training program, which consisted of short, 15 minute training sessions done remotely by the instructor through WebEx. Students logged in at their desks and were back to work quickly. Application classes were offered through WebEx to all divisions, ensuring all staff received the same training and also reducing costs. Finally, annual programs including Law Clerk/Extern Training, IT Security Training, and the Winter Education Seminar were offered.</p> <p>The Office Services/Space Planning Department continued to offer emergency preparedness and judicial security support to the court through training and relevant supporting materials. This included the expansion of the Floor Warden program to include all staff, supervisors, and managers. The district-wide training sessions were labeled mandatory for the Clerk's office staff and strongly recommended for judicial chambers. This single change, which will expand the knowledge base from a previously small group of people (Floor Wardens) to all employees, is expected to net significant benefits to the court during emergency situations. The court also addressed various emergency communications issues and implemented an interim judicial evacuation protocol which supports current USMS capabilities. The 2013-2014 series of the Paths to Success leadership development program began in March. The district-wide program allows the Court's aspiring leaders the opportunity to develop their leadership and project management skills, and to become more versatile Court employees. The orientation session covered an overview of the program and an introduction to leadership discussion. The program held class sessions throughout the year and will conclude in May 2014.</p>

HUMAN RESOURCES

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4.	Enhance training for all staff. (cont.)	<p>The Court introduced two new tools, the PeopleSoft HRMIS ePerformance module and Individual Development Plans (IDPs), which helped staff in performing their duties, especially during these times of constrained resources. ePerformance enabled all Clerk's Office Performance Evaluations (PEs) to be completed online. The Court also introduced IDPs, a new form for capturing and tracking learning and development goals for all staff. Automating the PE process across the district helped the Court be more efficient. Also, adding an IDP to each Performance Plan promoted skill development and helped staff to be more effective in their positions.</p> <p>Hour-long sessions for the launch of CM Assist were offered. CM Assist is a case distribution program that allows the user to distribute and organize caseloads to employees and will make it easier for work to be distributed across the divisions.</p> <p>The Bankruptcy Court partnered with the Ninth Circuit Law Library and LexisNexis to bring an educational program to the Court. The program was broadcast to Judges and Chambers staff at participating division offices.</p> <p>The Court hosted a two-day cross-agency training session for employees who perform the role of Contracting Officer's Representative (COR) at their agencies. The course was facilitated by an experienced instructor from the Northwest Procurement Institute. The program provided CORs with complete and comprehensive coverage of contract formation and contract administration policy and issues, including standards of conduct and ethics; development of requirements documents; contract documentation; inspection procedures; changes, terminations, and disputes.</p>
5.	Develop a new employee recognition program consistent with national guidelines.	<p>The Court implemented a new employee recognition program called Spot-on-Award for Recognition (SOAR). During 2013, the third year that the SOAR program was in place, a total of 188 awards were given to 112 employees district-wide.</p> <p>SOAR gives the opportunity for the Clerk's Office to recognize an employee's contribution to the performance of a team, division, or the entire district. Awards are given based on contributions to the Court in the areas of Customer Service, Outstanding Performance, Teamwork, Suggestions, Special Acts, and Special Service. Awards are divided into three categories: monetary, non-monetary, and time-off.</p> <p>The program also includes custom minted coins that are awarded by the Chief Judge or Executive Officer/Clerk of Court for significant contributions.</p>

HUMAN RESOURCES

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6.	Establish a mechanism for line staff to provide feedback to management staff.	<p>Establish a mechanism for line staff to provide feedback to management staff.</p> <p>Process Improvement:</p> <ul style="list-style-type: none"> • Saving the Court money by streamlining how rental checks are processed • Changing the procedures for BNC notices • Scrubbing unused or duplicate codes from the CM/ECF Dictionary • Creating training modules to ensure all staff understand bankruptcy in the same way <p>Communication:</p> <ul style="list-style-type: none"> • Standardize and publicize best practices for communication (email etiquette, utilizing Tasks Lists, Reminders) • HELP articles in monthly court newsletter • Creation of Job Shadow proposal <p>Employee Engagement:</p> <ul style="list-style-type: none"> • Creation of High Five Board for employee recognition • Organized several volunteering/donation initiatives (school supplies, food drive, etc.) • Creation of iBOT training plans
7.	Explore alternative work schedules for staff.	No update
8.	Implement digital time card and leave tracking/management systems.	<p>The Court adopted the Judiciary's HRMIS electronic time card and leave tracking system in December 2012.</p> <p>In January 2013, Court staff started using the HRMIS Leave Tracking module to submit leave requests and timesheets.</p>

INFORMATION MANAGEMENT

Obj.#	Objective	Accomplishments/Status
1.	Expand CM/ECF to all constituents.	<p>The Court continued testing eSR, a national CM/ECF program for pro se filers to electronically file petitions. Effective December 1, 2013, changes to the FRBPs and CM/ECF relieve debtors of the obligation to file certification of completion from a financial management course, as long as the course provider directly provides certification to the court. FRBP 1007(b)(7) now allows financial management course providers to notify courts when debtors have completed the financial management course. Supporting the rule change, the new Financial Management Provider functionality in CM/ECF permits course providers to log in as external users and certify that debtors have completed the course by docketing the appropriate event.</p> <p>The Court introduced Filing Agent on June 21, 2012 to enable attorneys to assign logins for their office staff that use CM/ECF. All those using Filing Agent can do so simultaneously.</p> <p>On December 1, 2013, a new CM/ECF feature was added to enable approved financial management course providers to electronically file certificates of course completion. The Clerk's Office extended invitations to over 130 financial management course providers. Over 1,500 financial management course completion certifications were electronically filed at the Court.</p> <p>The Court provides online CM/ECF training modules for those interested in obtaining access to CM/ECF or improving their skills. By the end of 2013, a total of 4,891 users had been registered to electronically file documents via CM/ECF.</p>
2.	Reduce paper/printer costs.	<p>Among bankruptcy courts nationwide, the Central District is one of the most efficient when sending notices and orders via the Bankruptcy Noticing Center (BNC). The district is the most efficient in the nation when cost is measured per new case filed, and is second most efficient when average cost per notice is measured. A high percentage of attorneys, trustees, and other professionals only receive notices and orders from CM/ECF via Notice of Electronic Filing (NEF), meaning that the BNC sends each notice to fewer recipients. The Central District has also taken measures to shorten BNC mailings, cutting unnecessary information, condensing forms, and eliminating requirements. Effective in January 2014, the Court eliminated the requirement that a Notice of Entered Order and Service List be included in lodged orders. In March 2014, the Court will begin a pilot program that will allow the BNC to deliver notices to debtors by email.</p> <p>Networked copiers throughout the Court enable duplex printing and eliminate the need for separate scanners and fax machines while reducing toner expense. The use of PDF files that can be viewed, either from e-mails or from the Court's website, continues to increase (e.g., judicial committee minutes, procedural manuals, reports, newsletters, etc.). The Court studied printing practices and costs to help the Court make business decisions on how to acquire supplies and services more effectively and efficiently reduce expenses.</p>

INFORMATION MANAGEMENT

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3.	Enable pro se e-filing safely and in accordance with applicable laws.	The Court continued developing and testing eSR, a national CM/ECF program for pro se filers to electronically file petitions.
4.	Educate other bankruptcy courts regarding the benefits and advantages of the calendaring program CIAO! and other software developed by the Court.	<p>Chief Judge Peter H. Carroll and members of the Clerk's Office provided an overview of CIAO! to a national panel from the Administrative Office of the U.S. Courts and other courts in 2008. In 2009, a member of the Clerk's Office demonstrated CIAO! to the CM/ECF Next Generation task force.</p> <p>The Administrative Office of the U.S. Courts adopted a competing calendaring program, and the Court has ceased promoting CIAO! to other courts, but continues to enhance features in CIAO! to serve the Court's purposes.</p> <p>In April 2013, the Clerk's Office upgraded to CIAO! 6.0. This upgrade makes CIAO! compatible with Microsoft Word 2010. Also, CIAO! 6.0 incorporated visual and functional changes to the calendar. The monthly default screen enabled users to have a "weekly view" of the calendar, and exception dates became highlighted in pink to make them easier to identify. Other changes appeared on the View Docket and View Related Documents pop-up screens, which provided the user with a cleaner collapsed view of the docket, and the option to expand the view to include attachments to the main docket entry. CIAO! users now use their Lotus Notes identification and passwords instead of a separate CIAO! identification and password.</p>
5.	Provide computer terminals in Clerk's Offices for pro se litigants to use for filing court documents electronically.	The Court continued testing Pro Se Pathfinder, a national CM/ECF program for pro se filers to electronically submit petitions. To practice coordinating with the local pro bono organization that will provide legal advice on questions that may arise when visitors use eSR, the Court is currently providing visitors access to a bankruptcy petition using Adobe Acrobat fillable forms. Visitors first attend Public Counsel's bankruptcy seminar, and then set an appointment with a clerk to use the fillable forms version of the petition at a Self-Help Resource Center terminal. Court staff assists visitors by flagging any legal advice questions for follow up by Public Counsel attorneys. Following a consultation with legal counsel, the electronic petition may then be updated by the visitor based on the advice provided. Last, Court staff assists with finalizing the petition and filing.
6.	Enable e-filing of proofs of claim by high volume claim filers such as the IRS.	<p>The Court registered the IRS and other high-volume claim filers to electronically file claims through CM/ECF.</p> <p>Since 2007, the Clerk's Office has been successful in reducing the volume of proofs of claim filed with the Court on paper by enabling high volume claim filers such as the IRS to electronically file proofs of claims through CM/ECF. The Clerk's Office is currently evaluating an electronic filing program endorsed by the AO that allows individual creditors and non-registered ECF filers to create, amend, and withdraw a Proof of Claim in any chapter over the Court's Internet. A login and password is not required to use the program. Therefore, the Clerk's Office must ensure that the program has sufficient security features to prevent the fraudulent filing of proofs of claim.</p>

INFORMATION MANAGEMENT

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7.	Modify CIAO! so tentative rulings are easily included in the docket as findings of fact and conclusions of law in support of court findings.	Not feasible as tentative rulings may be modified.