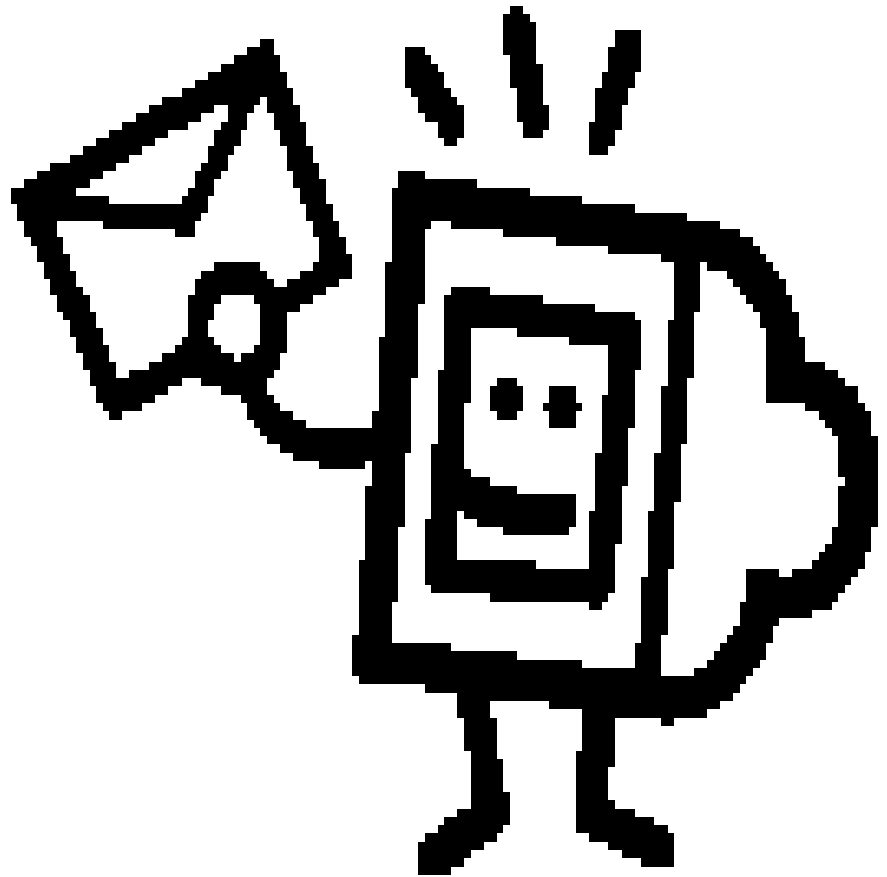


MANAGING

E-MAIL



# MANAGING



# E-MAIL

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## **WELCOME TO E-MAIL:**

Much of the office 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 pages 2-3 of the handout. It is a good idea to have a backup administrator with all of the permissions that the original administrator has. In the absence of the administrator the backup is able to access the inbox making necessary modifications.

## **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 24 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. Subfolders for individuals can also be used and email from the ECF inbox can be forwarded to the appropriate individual automatically. See page 18 for more information.

## **MAIL DELIVERY**

You can select two options for receiving your ECF mail:

1. email as documents are filed (24 hours a day-continually)
2. summary once a day (If you select this option - the rules wizard will not apply)

## **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 manage 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 fifteen (15) days of receipt.

## **DISCONTINUE SERVICE**

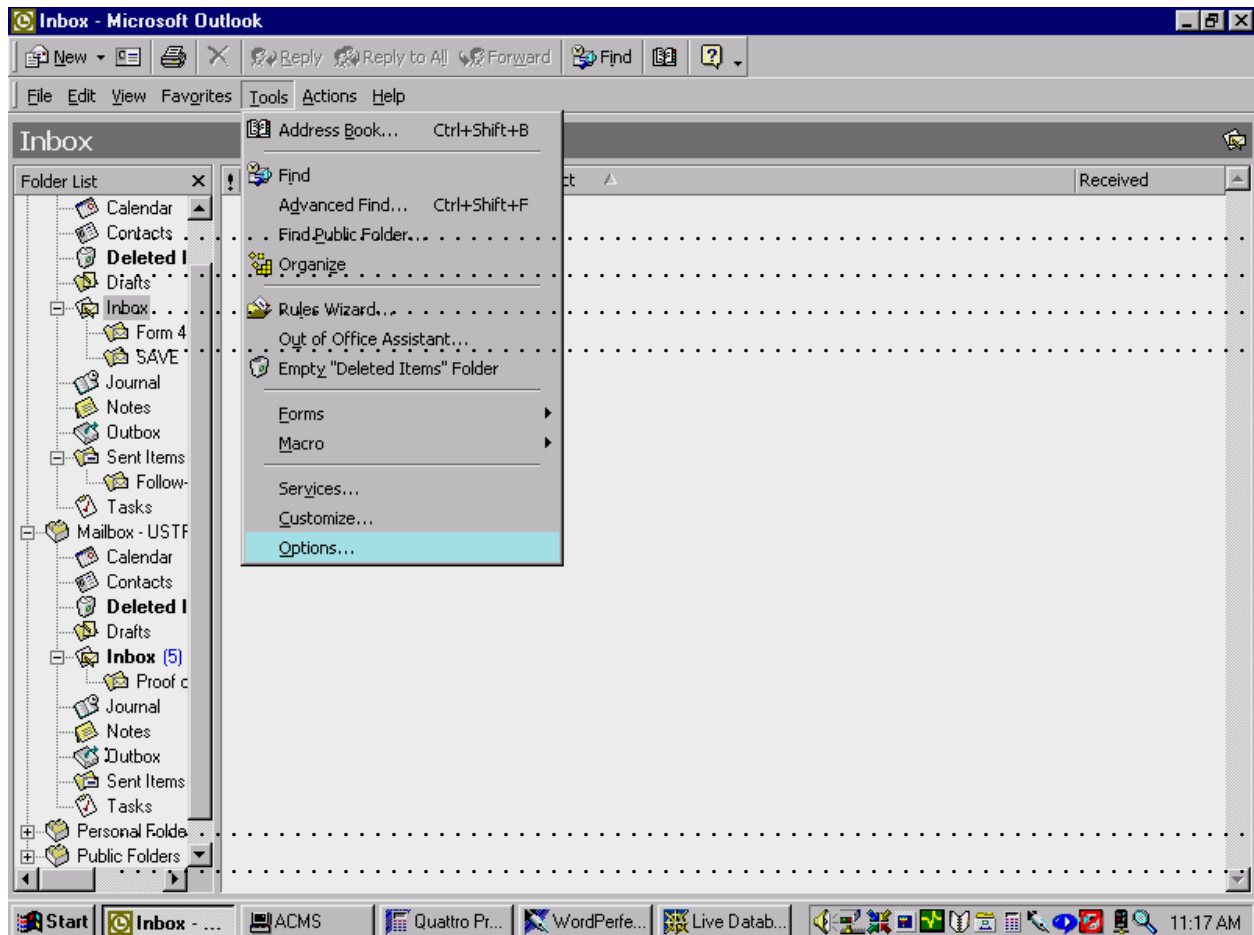
(This procedure may vary Region to Region/Court to Court)

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. Terminating yourself from a case is the only way that e-mail delivery will cease in a particular case.

## SETTING UP ECF E-MAIL (Selecting Delegates)

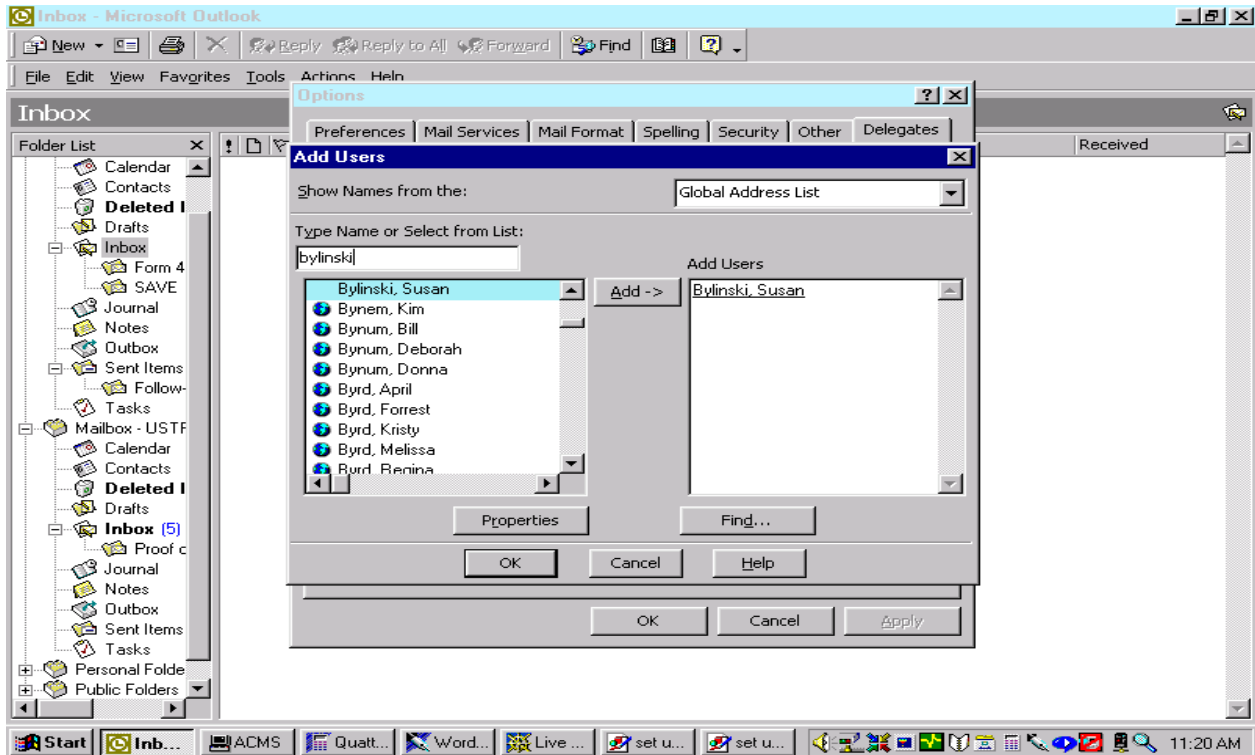
In preparation for CM/ECF, our office would recommend that you set up a special ECF E-mail mailbox for receiving electronic filings and notices only. This is the e-mail address that you will give to court to send your electronic notices and filing verifications.

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.

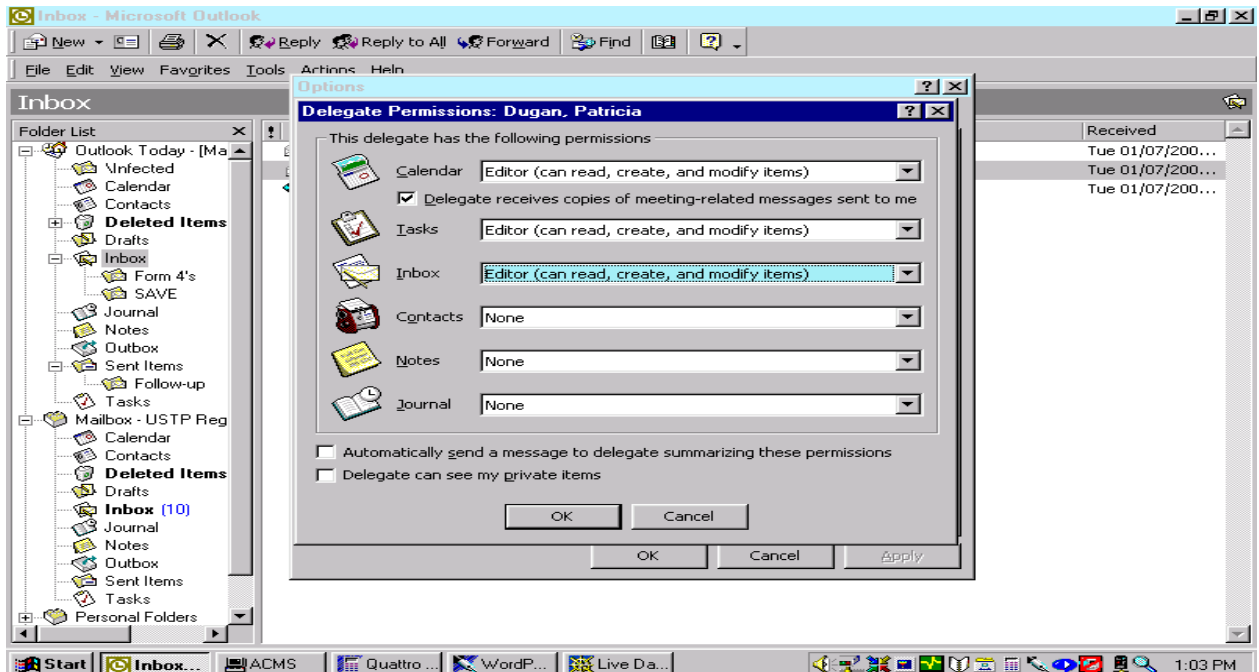


Once in the Options:  
Select the Delegates Tab and click on Add

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.

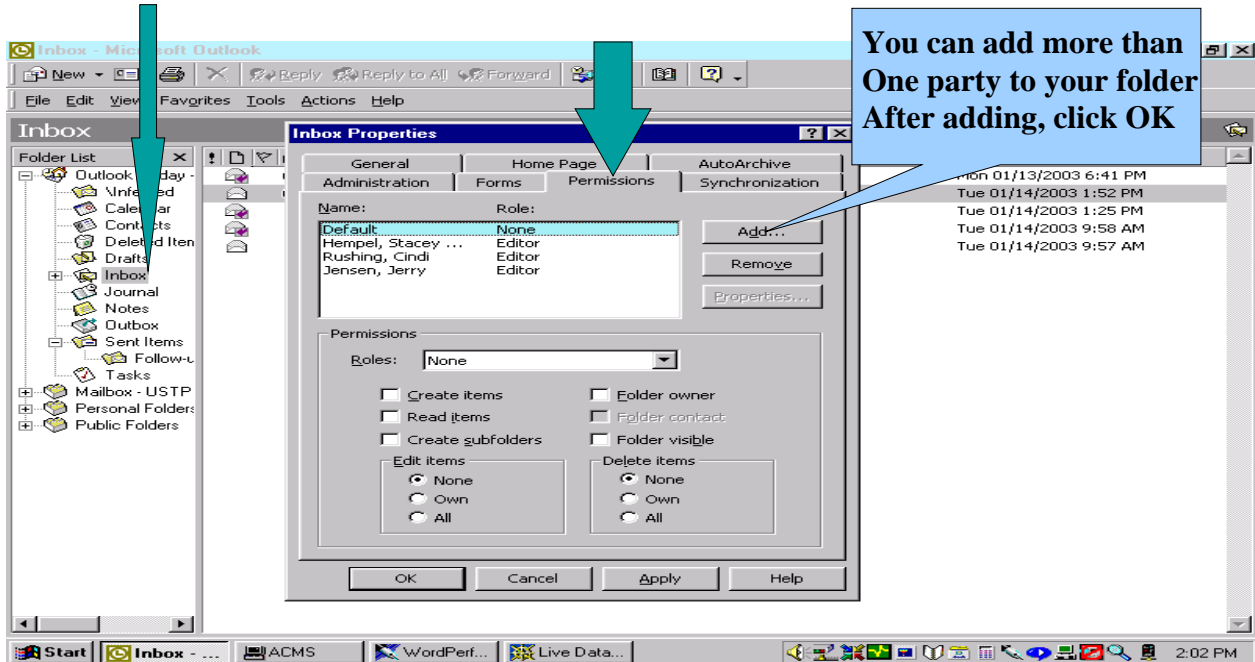


On the Delegate Permission screen, select the appropriate permissions for each delegate added. Select OK. This will take you back to the Options screen, click Apply. You can then proceed to Add another delegate or close the windows.

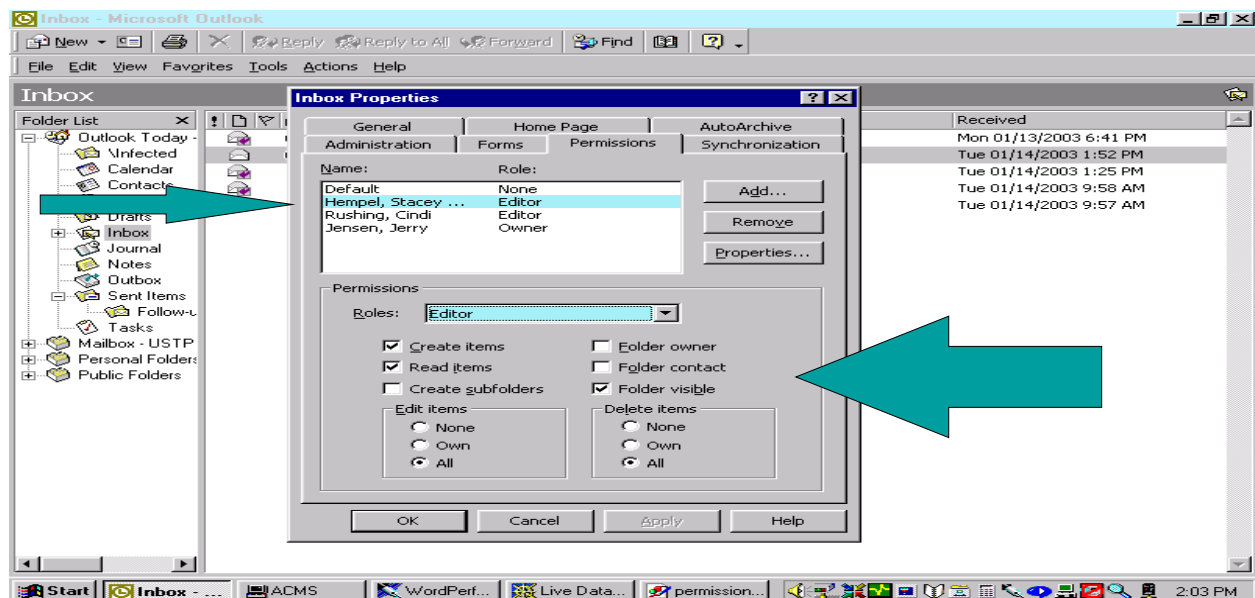


## PERMISSIONS

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 your 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.



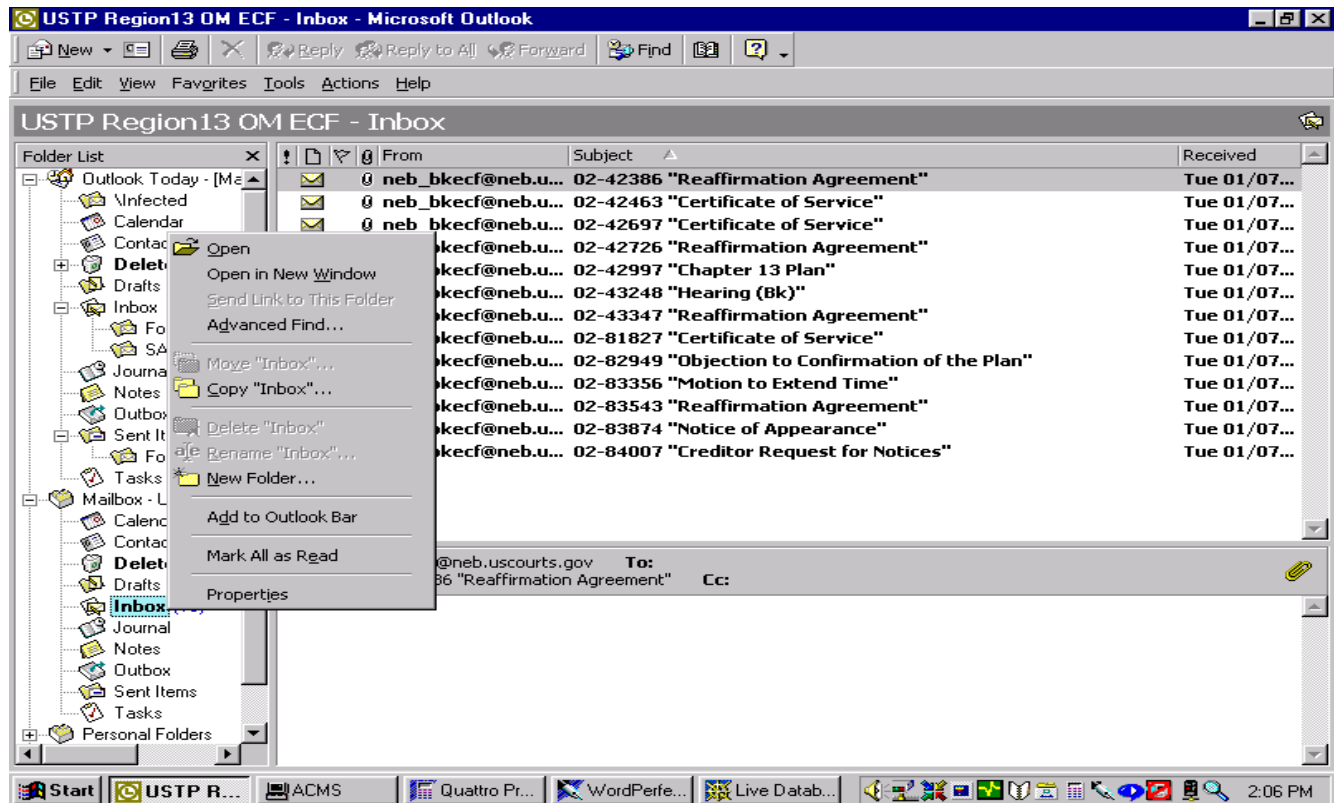
Next highlight the new name and select the properties or permissions below. Click OK when finished.



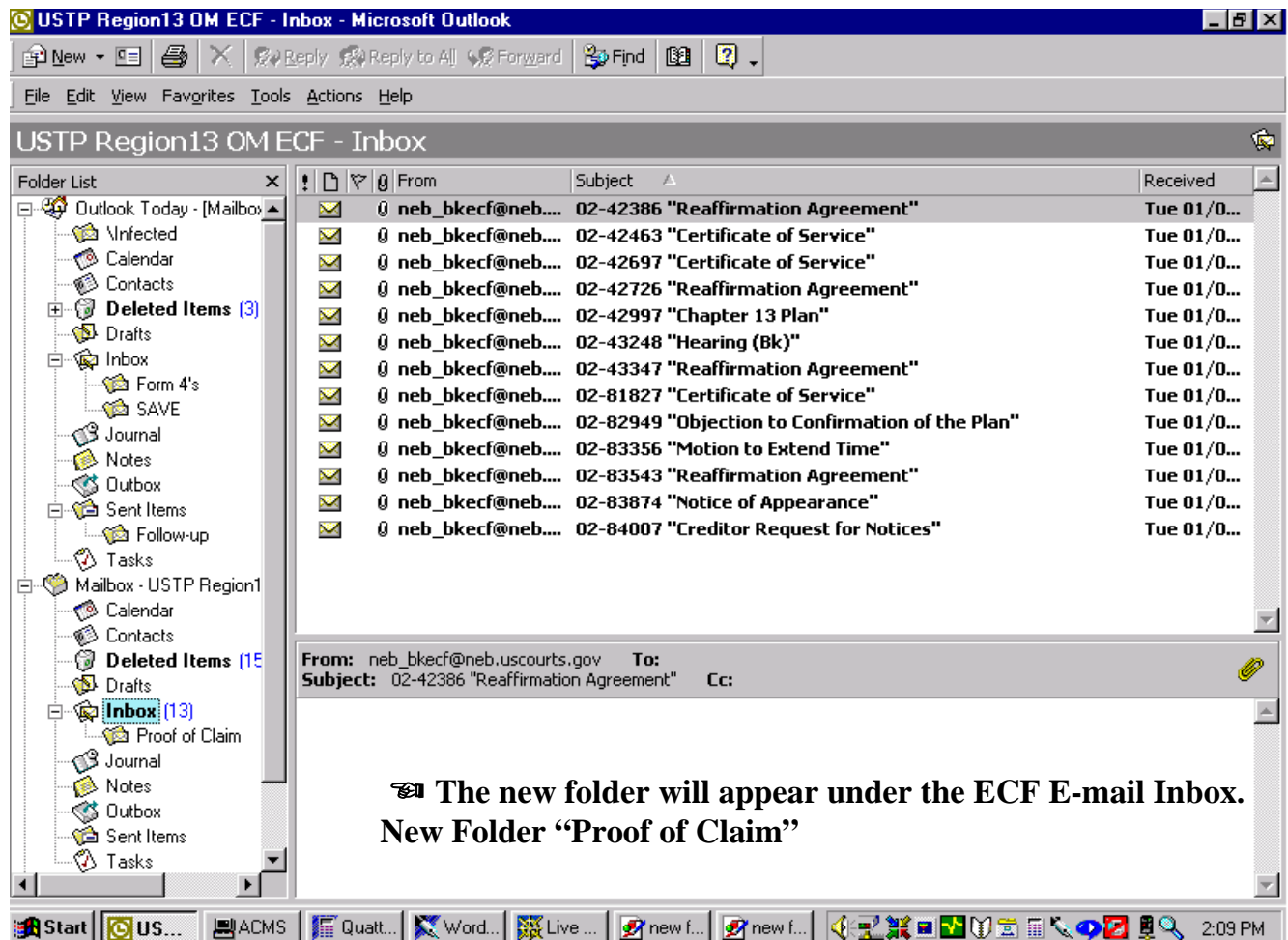
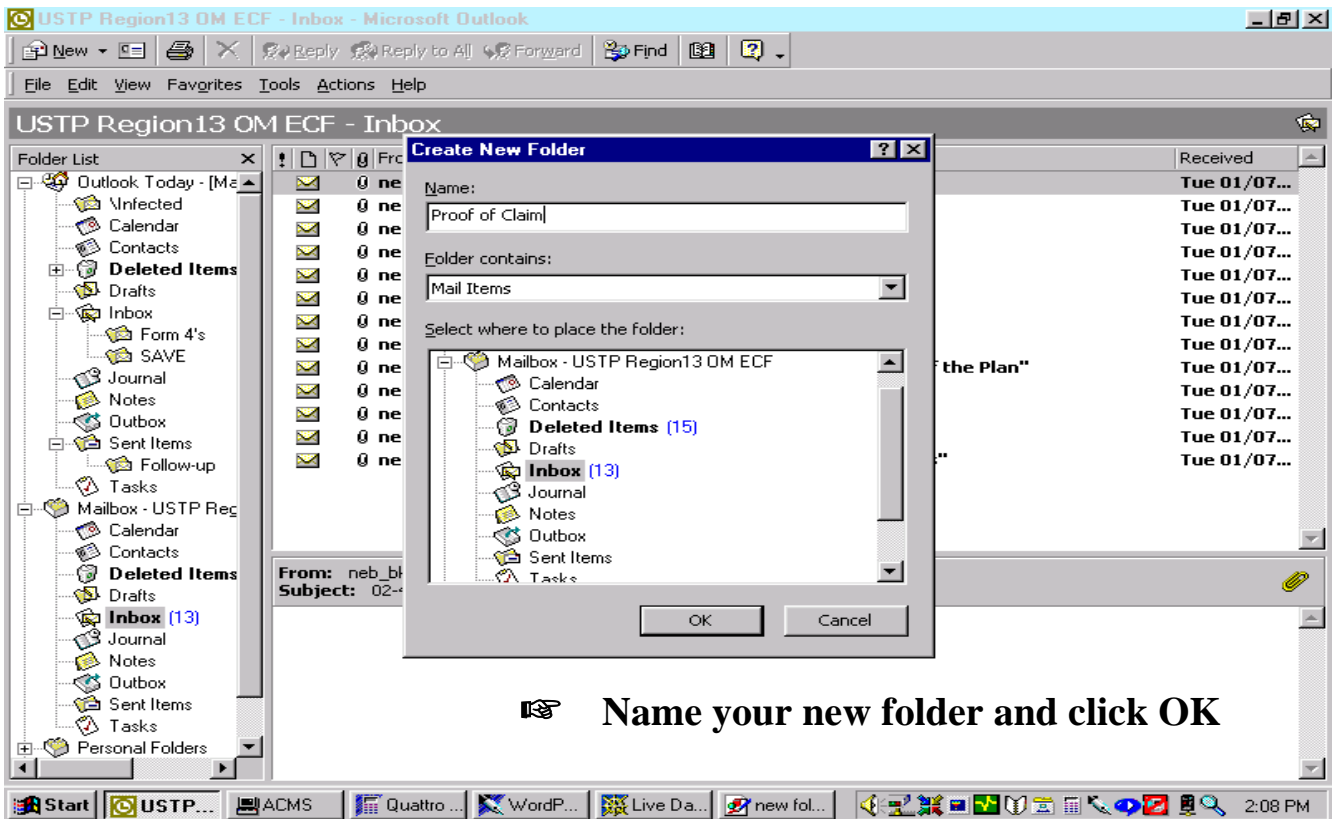


## SPECIAL FOLDERS IN YOUR E-MAIL

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



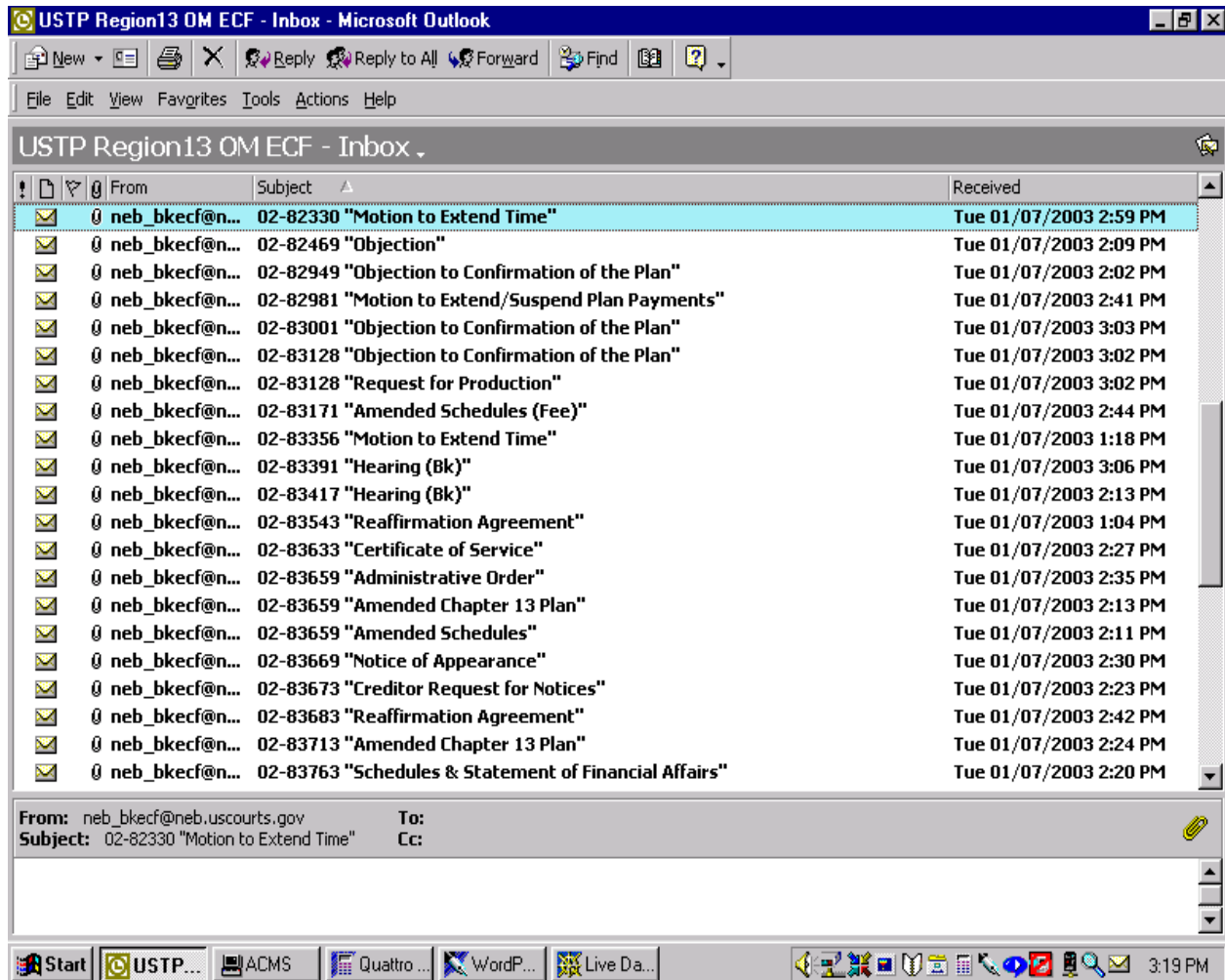
 **Highlight the ECF Mail Inbox, Right click your mouse and select New Folder**



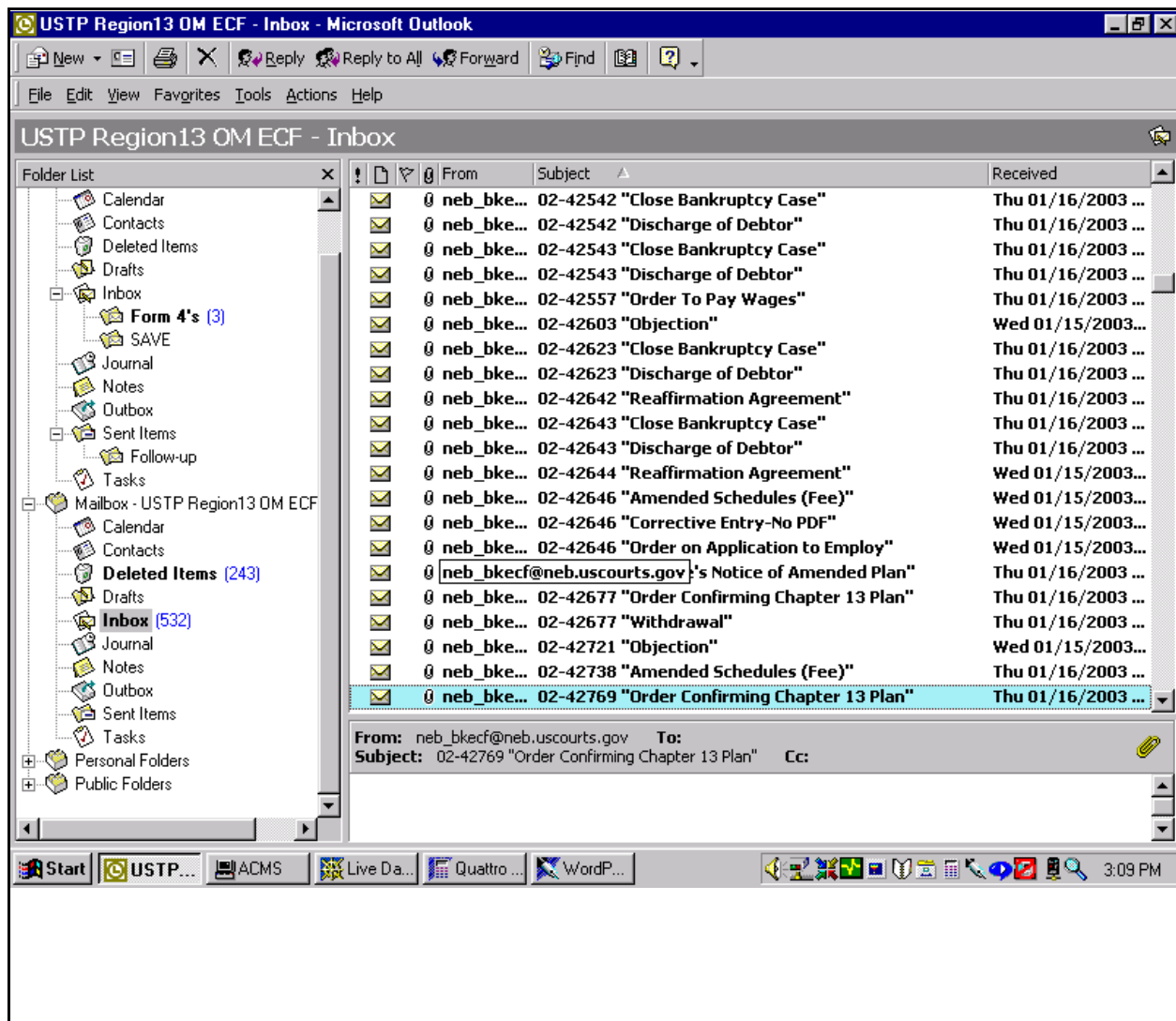
## WHAT E-MAIL LOOKS LIKE IN YOUR ECF MAILBOX

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.

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



Another example page of E-mails from the Bankruptcy Court:

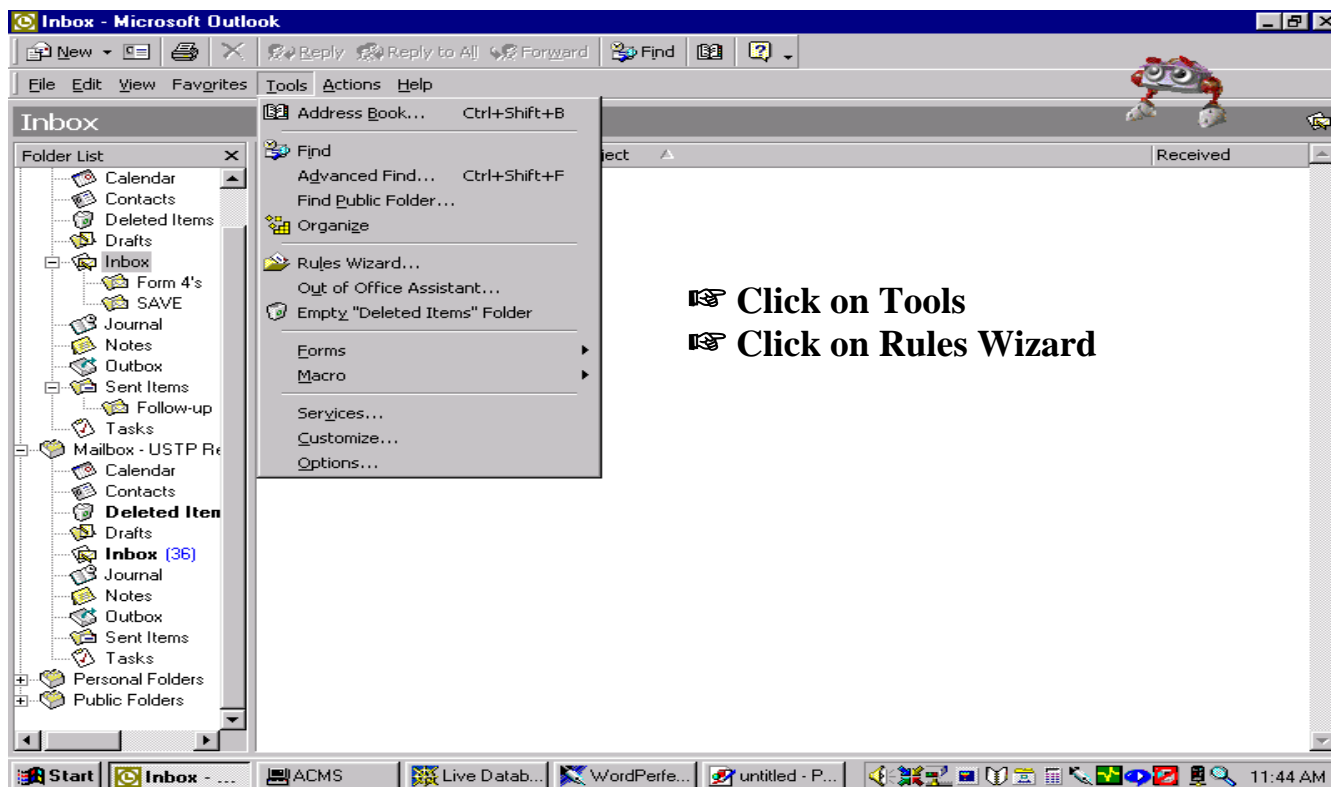


## TO SET RULES IN RULES WIZARD

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

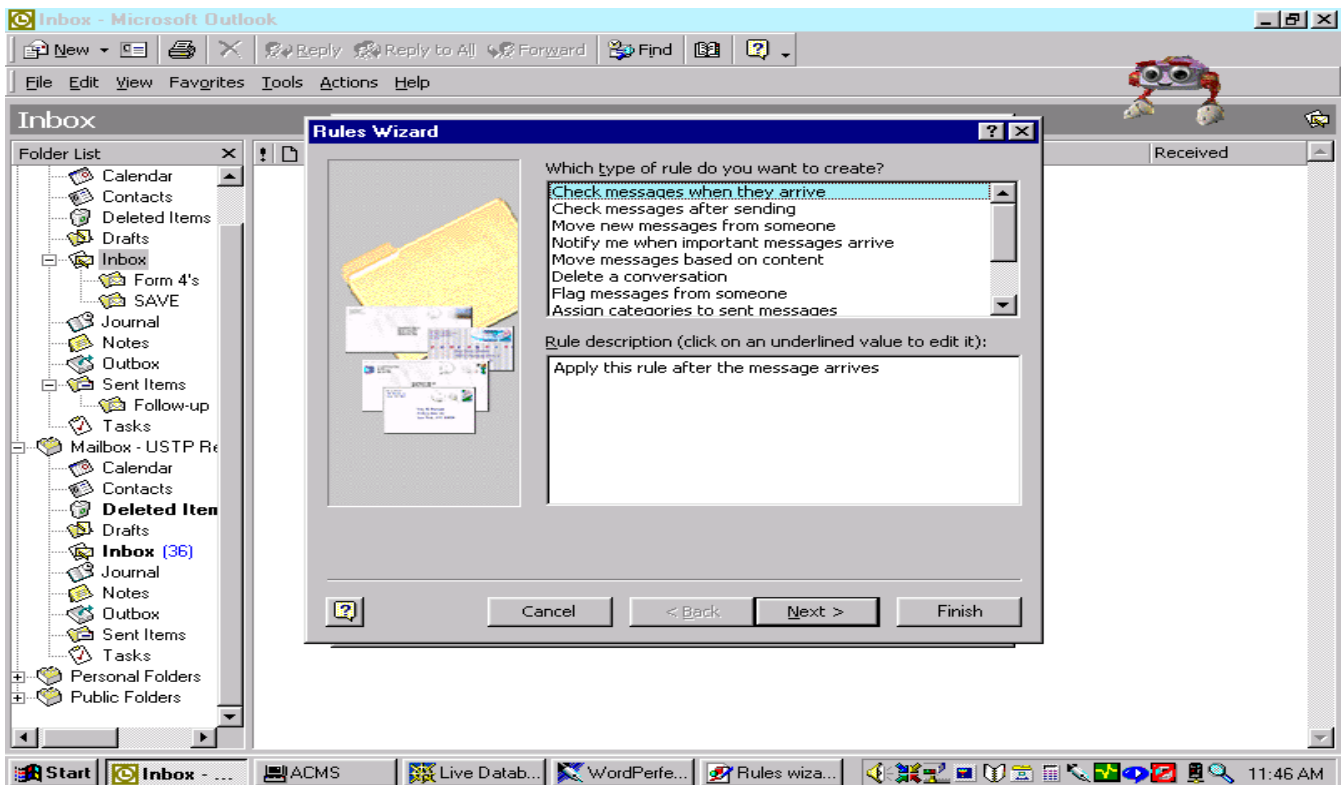
While in your ECF E-mail Inbox:



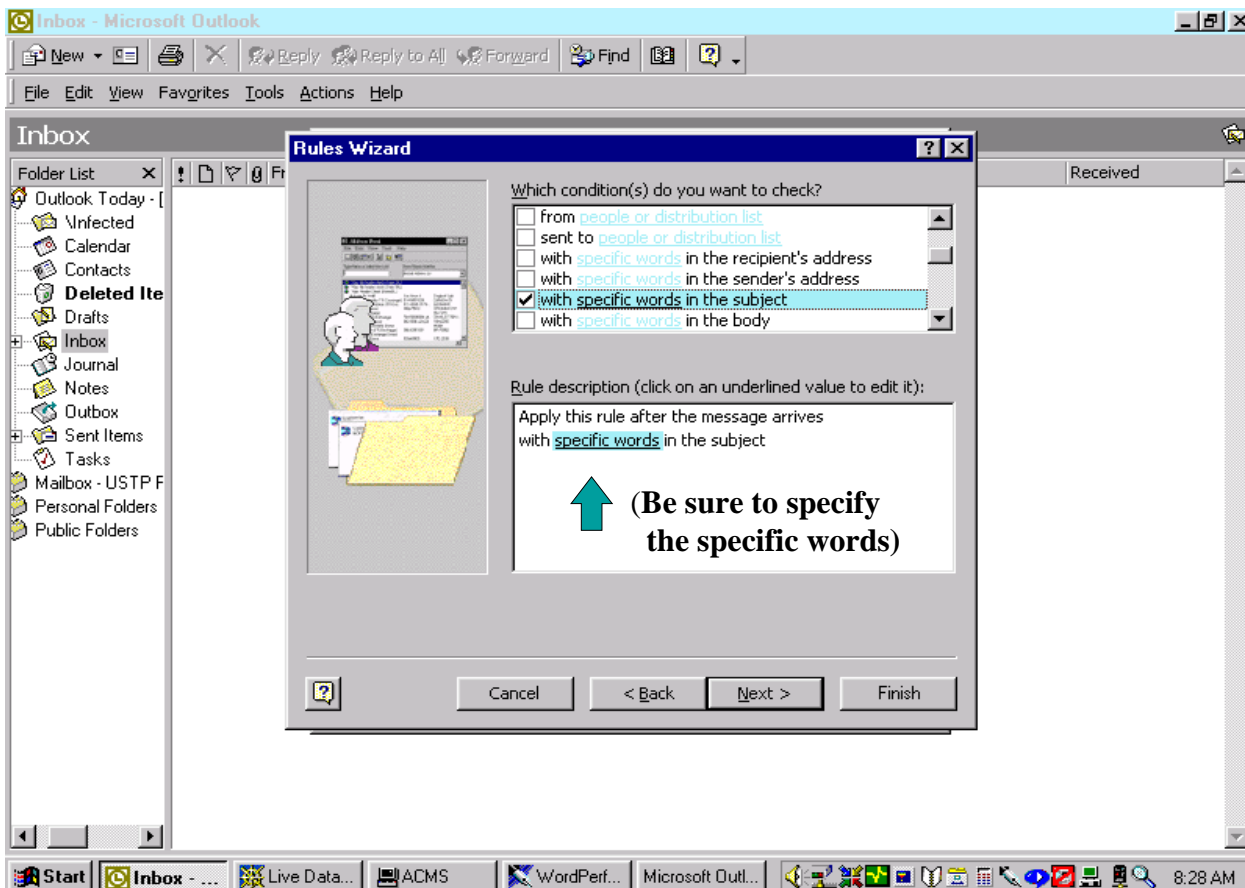
☞ Click on Tools  
☞ Click on Rules Wizard

☞ At the next screen, Click on New button

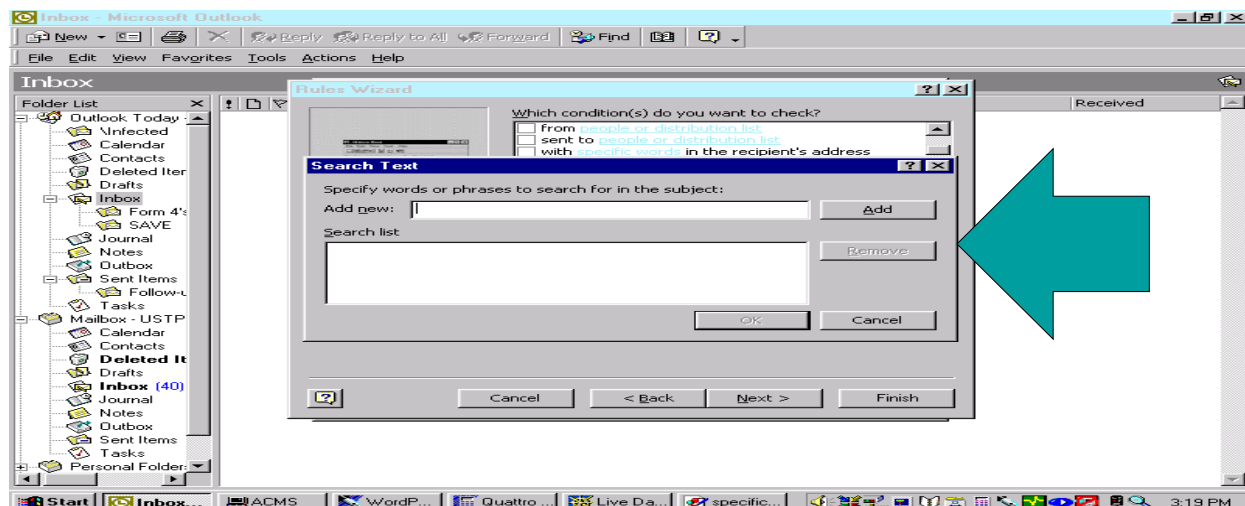
☛ At the “Which type of rule do you want to create” prompt, make sure to highlight: “check messages when they arrive,” click next



☛ 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 specific words.

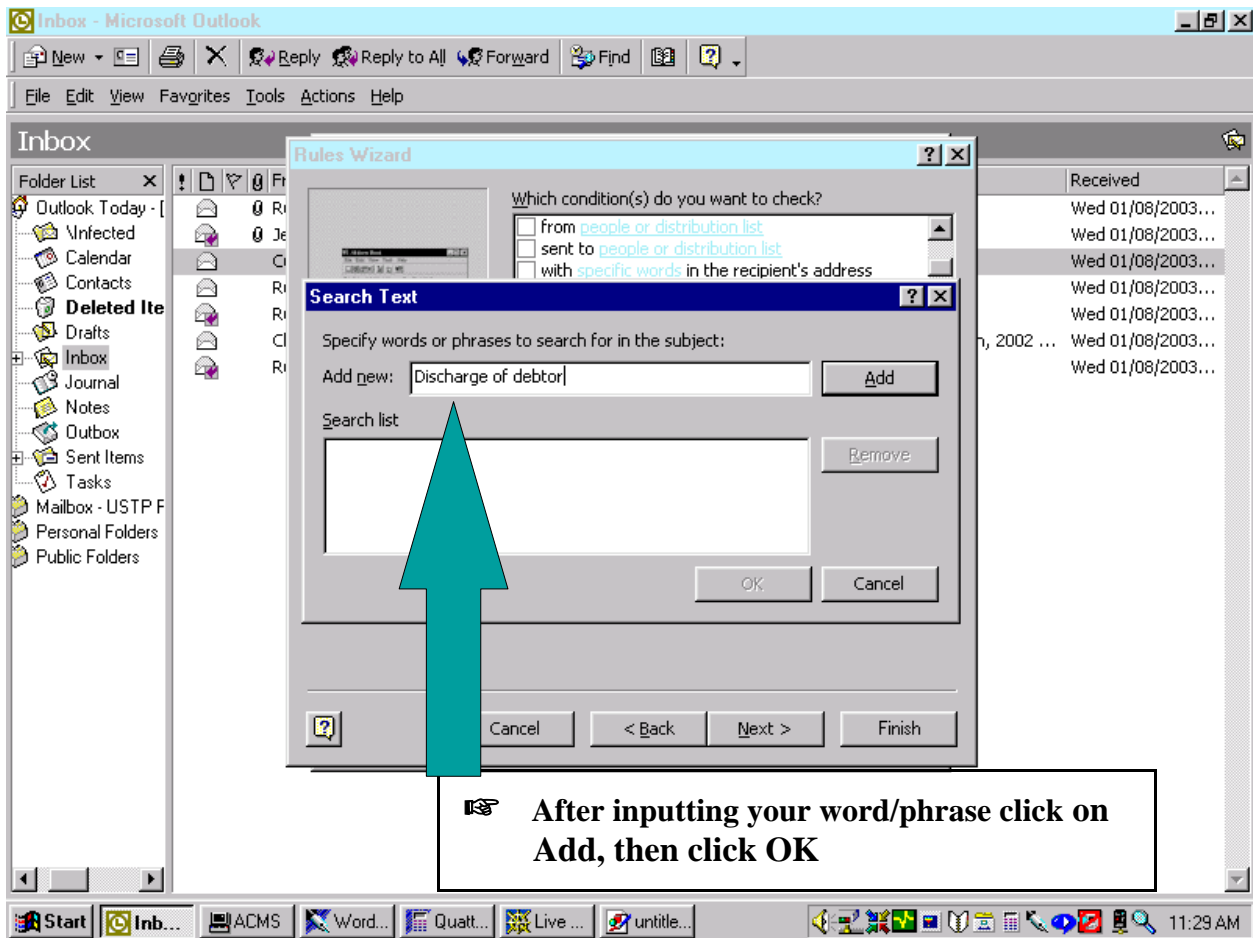


☛ In the Search Tool, Specify words or phrases to search for in the subject: Add new: input the word or words you would like to use this rule for. It is recommended that you DO NOT use Case Numbers as a search tool.

## 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

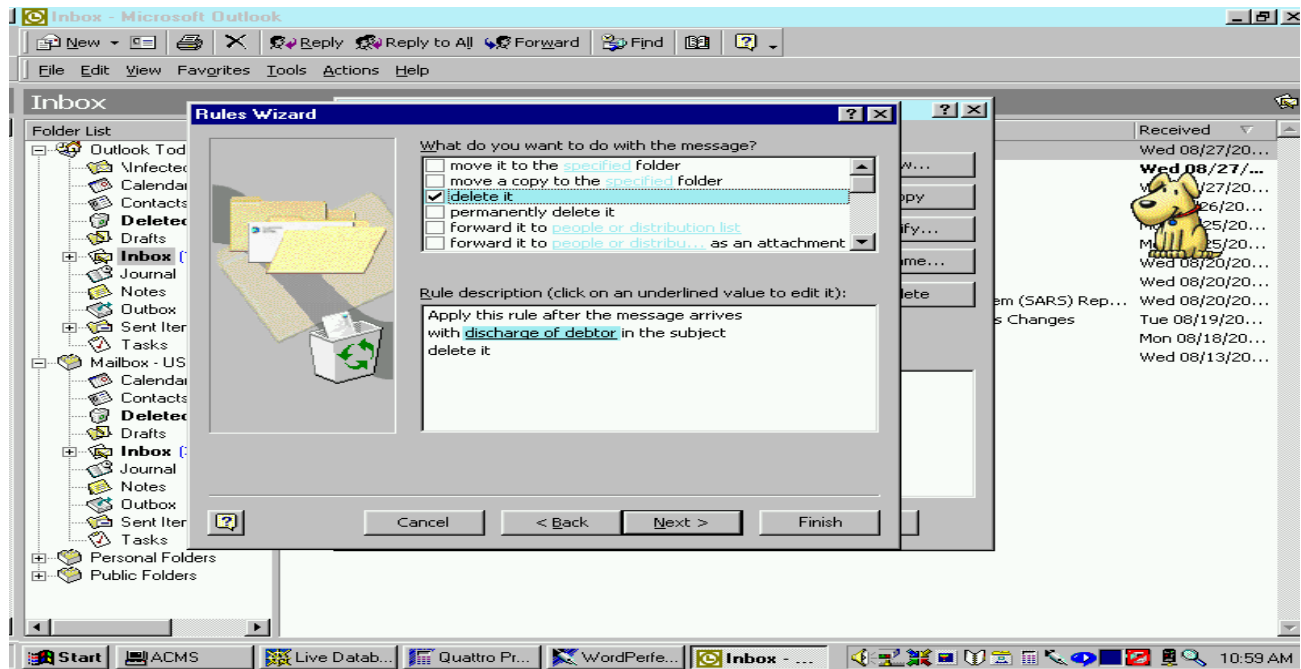


The screenshot shows the Microsoft Outlook interface with the Rules Wizard dialog box open. The 'Search Text' dialog is also open, showing the 'Add new' field containing 'Discharge of debtor'. A teal arrow points to the 'Add' button. A text box at the bottom right contains the instruction: 'After inputting your word/phrase click on Add, then click OK'.

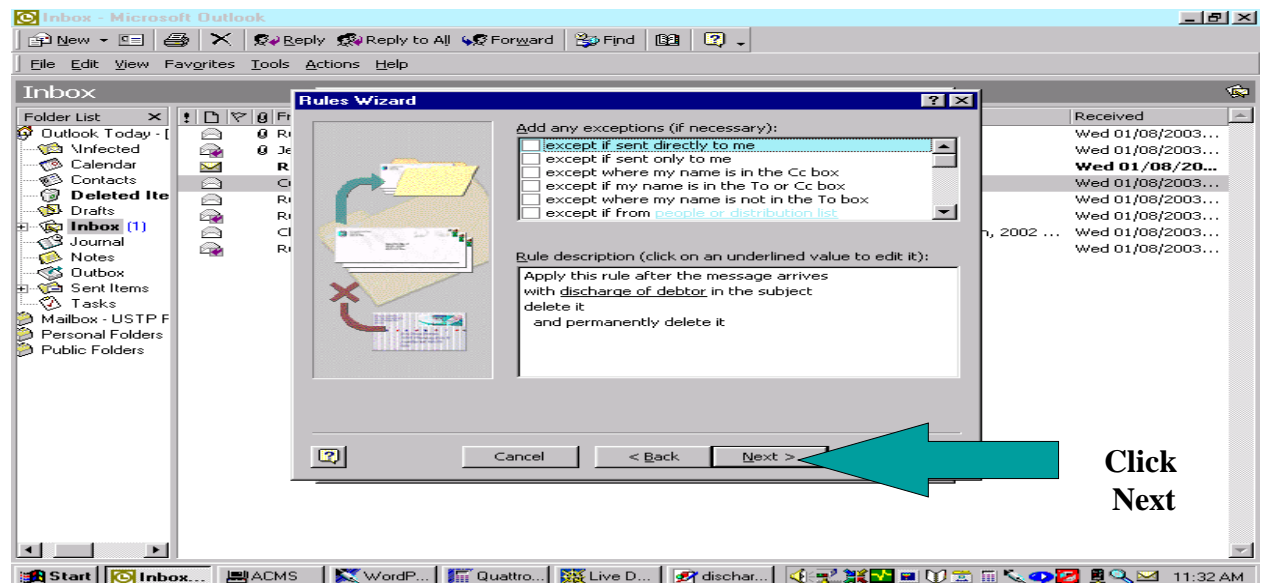
**After inputting your word/phrase click on Add, then click OK**



☛ At the “What do you want to do with this message?” screen, highlight and select Delete it, you can also select Permanently Delete.

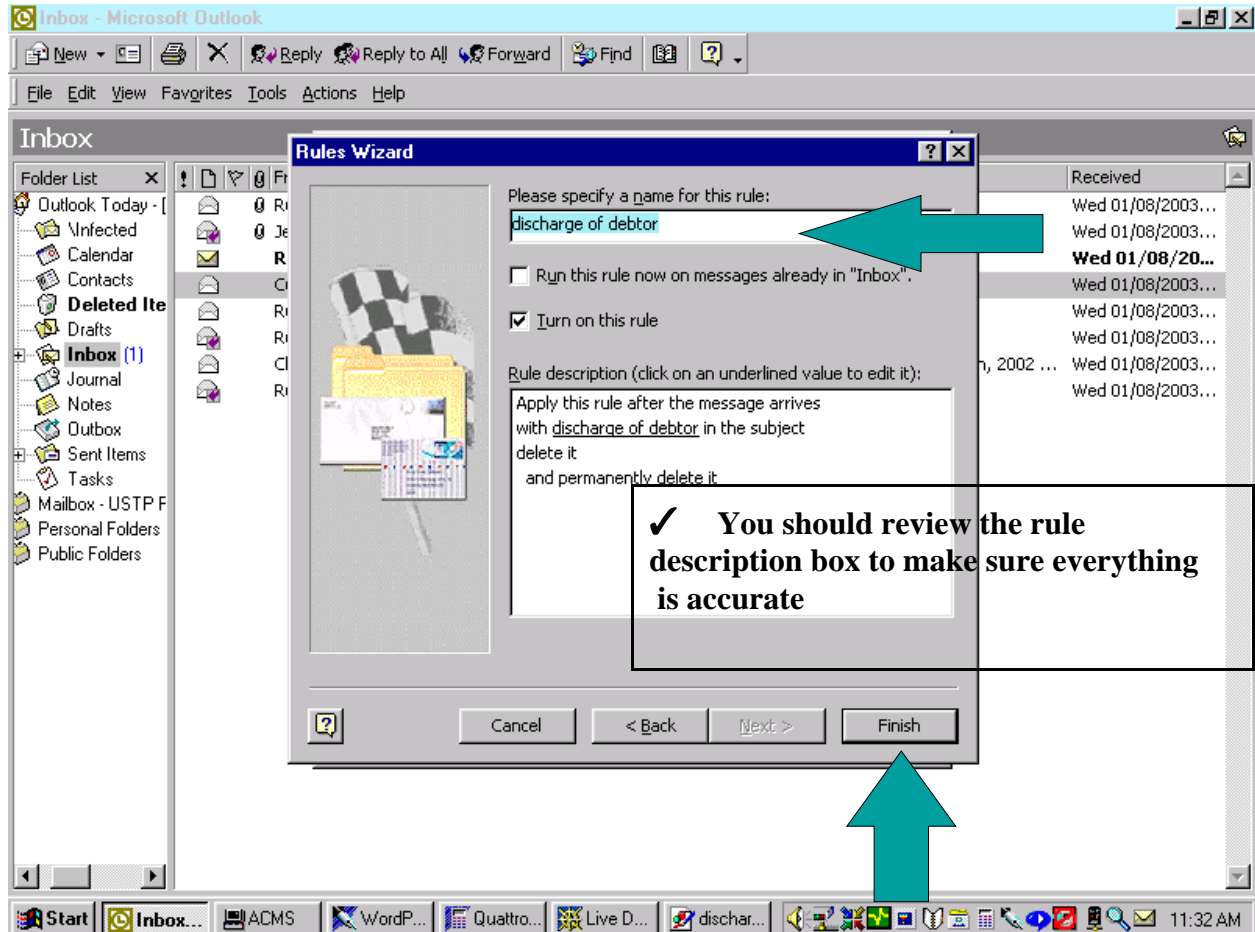


☛ If okay to delete the items, click on Yes and then click on Next.



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

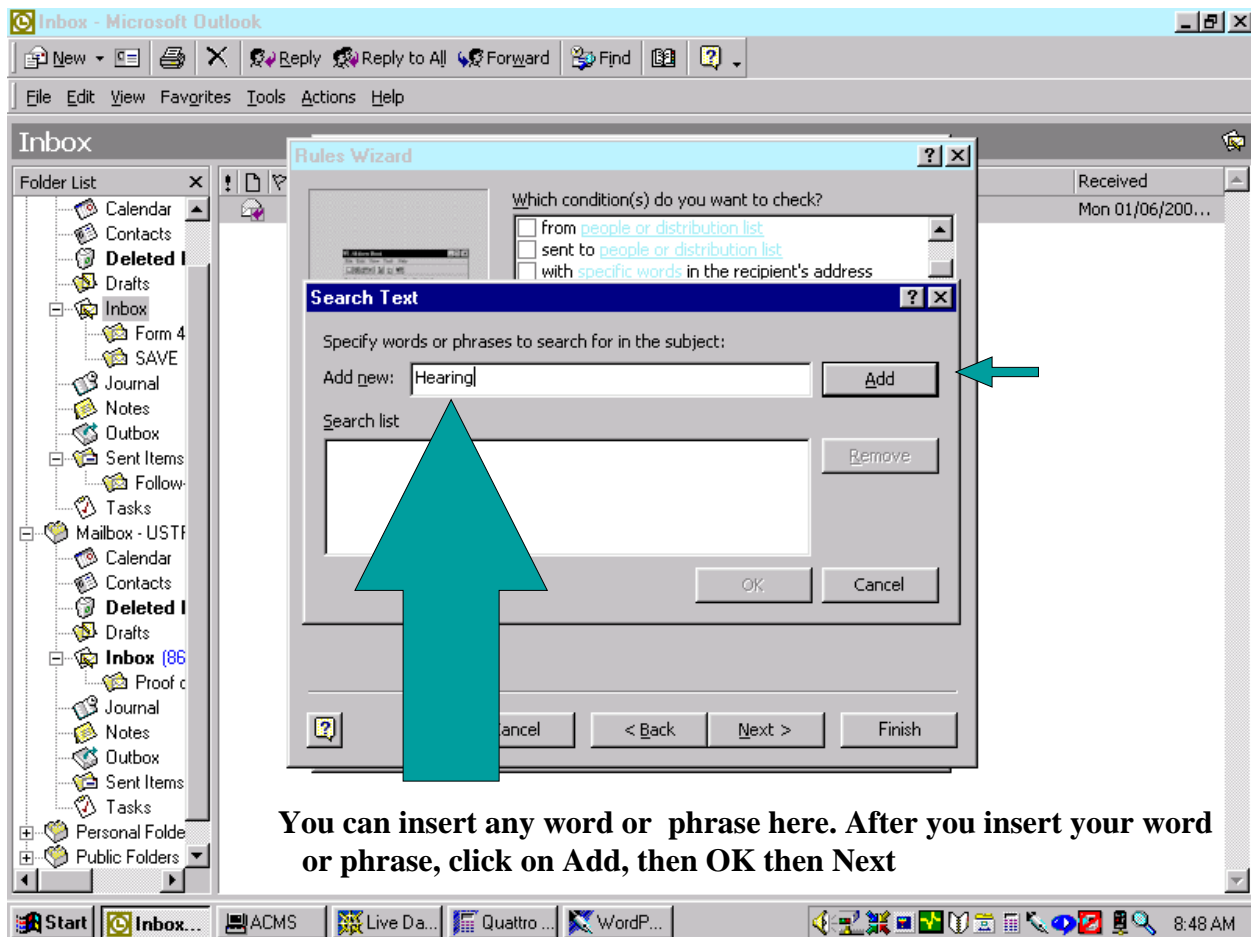
At the next screen, please specify a name for this rule. The shorter the name, the better. We will simply call this rule, Discharge of Debtor. After you fill in the name of the rule, click on Finish.



## EXAMPLE OF RULE WITH A SOUND NOTIFICATION

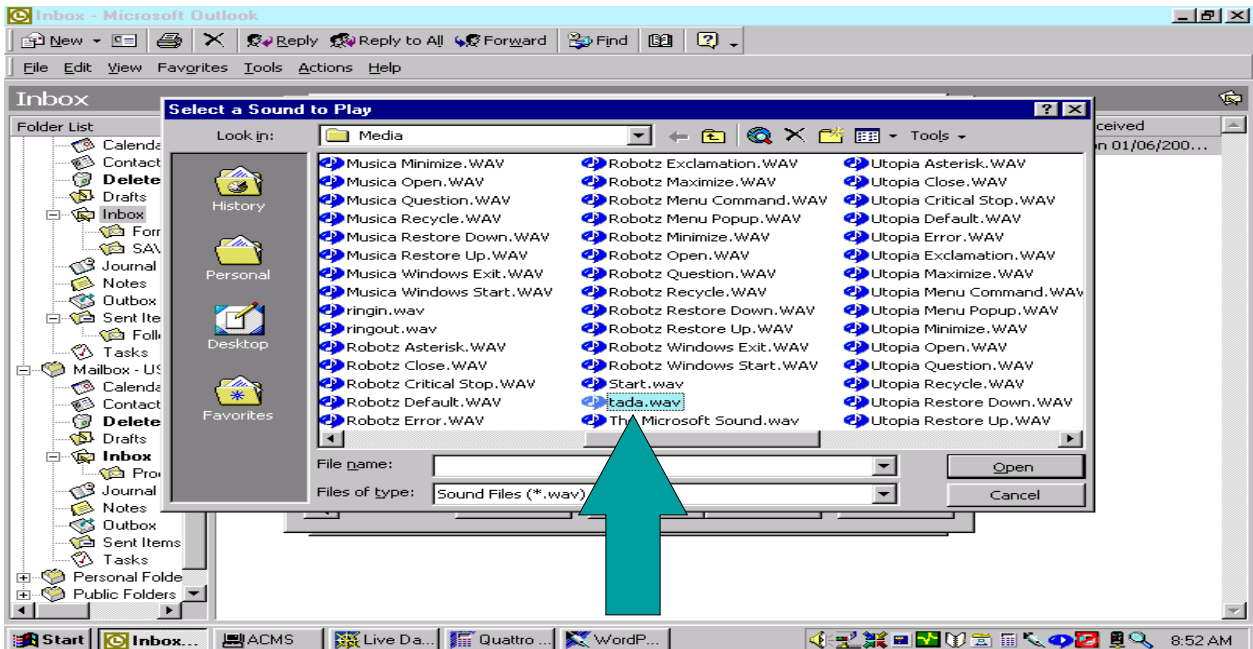
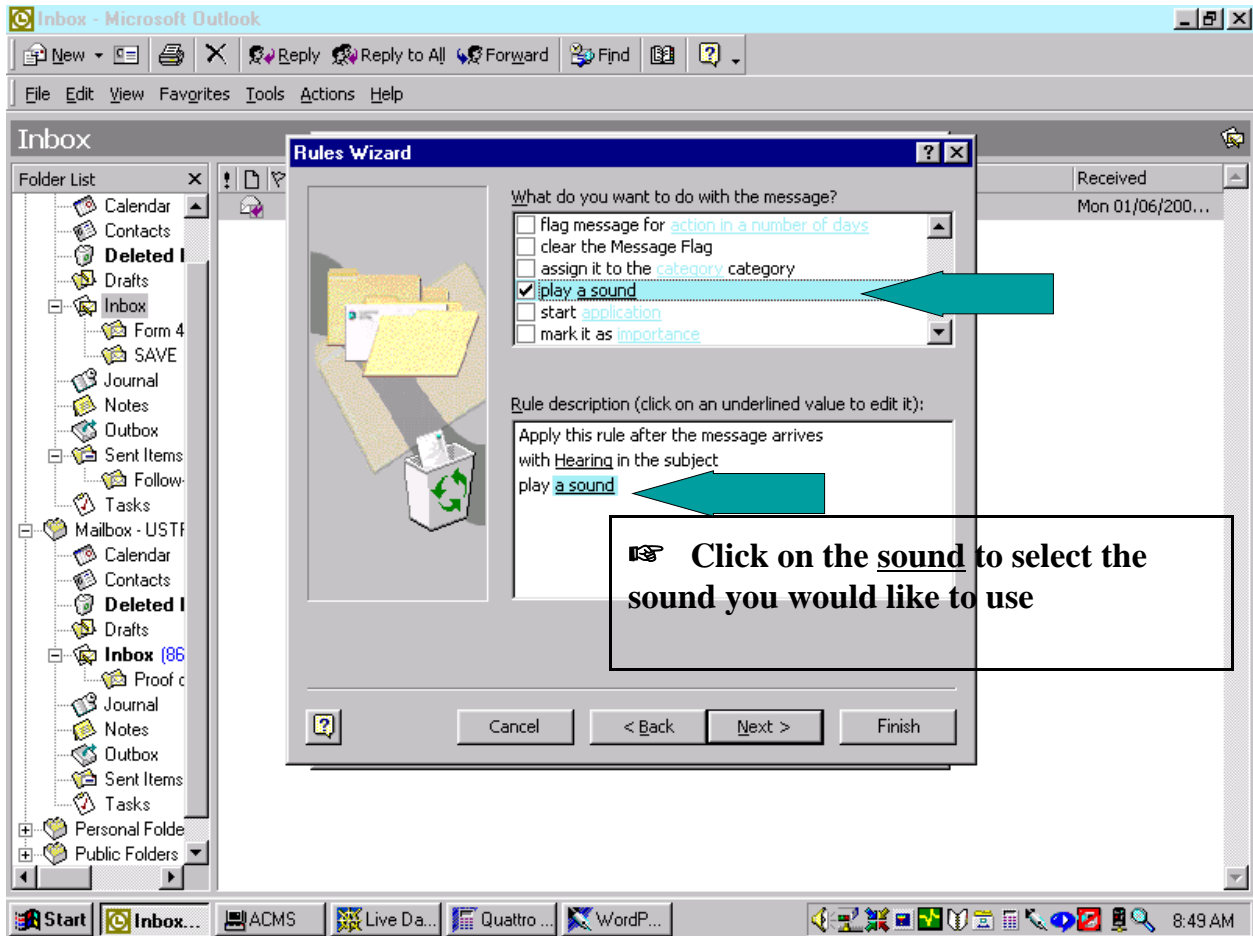
For this example we will assume that if a Hearing notice is received electronically we would like our computer to notify us by making a specific sound. To do this:

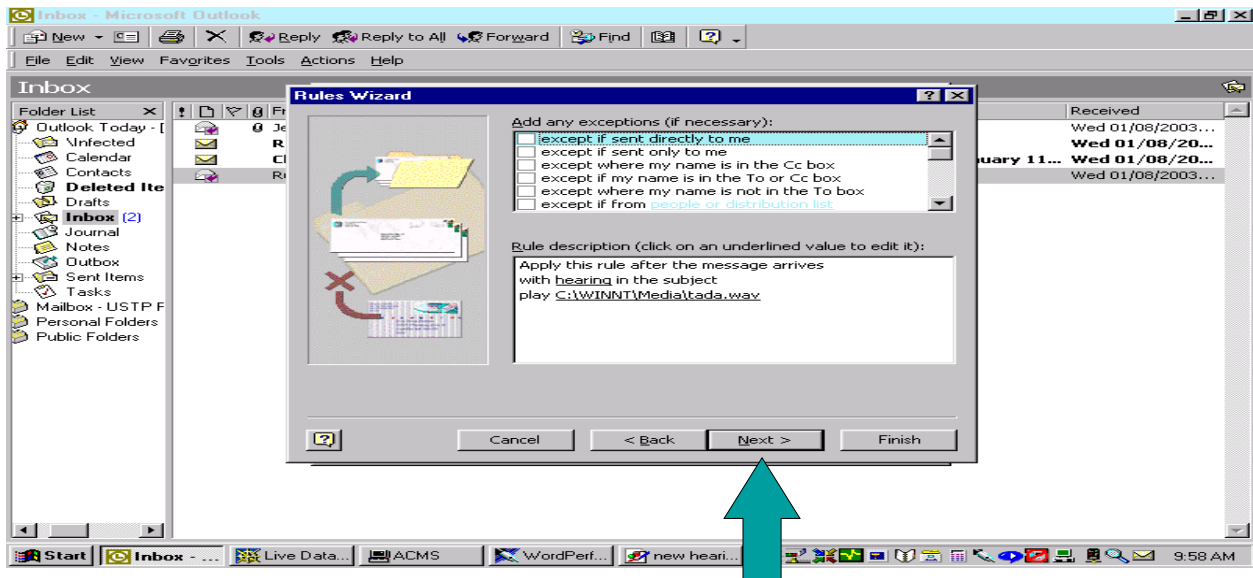
Follow the previous steps on pages 8 to 10. On page 10 where you are asked to insert a specific word or phrase we will input the word Hearing.



**You can insert any word or phrase here. After you insert your word or phrase, click on Add, then OK then Next**

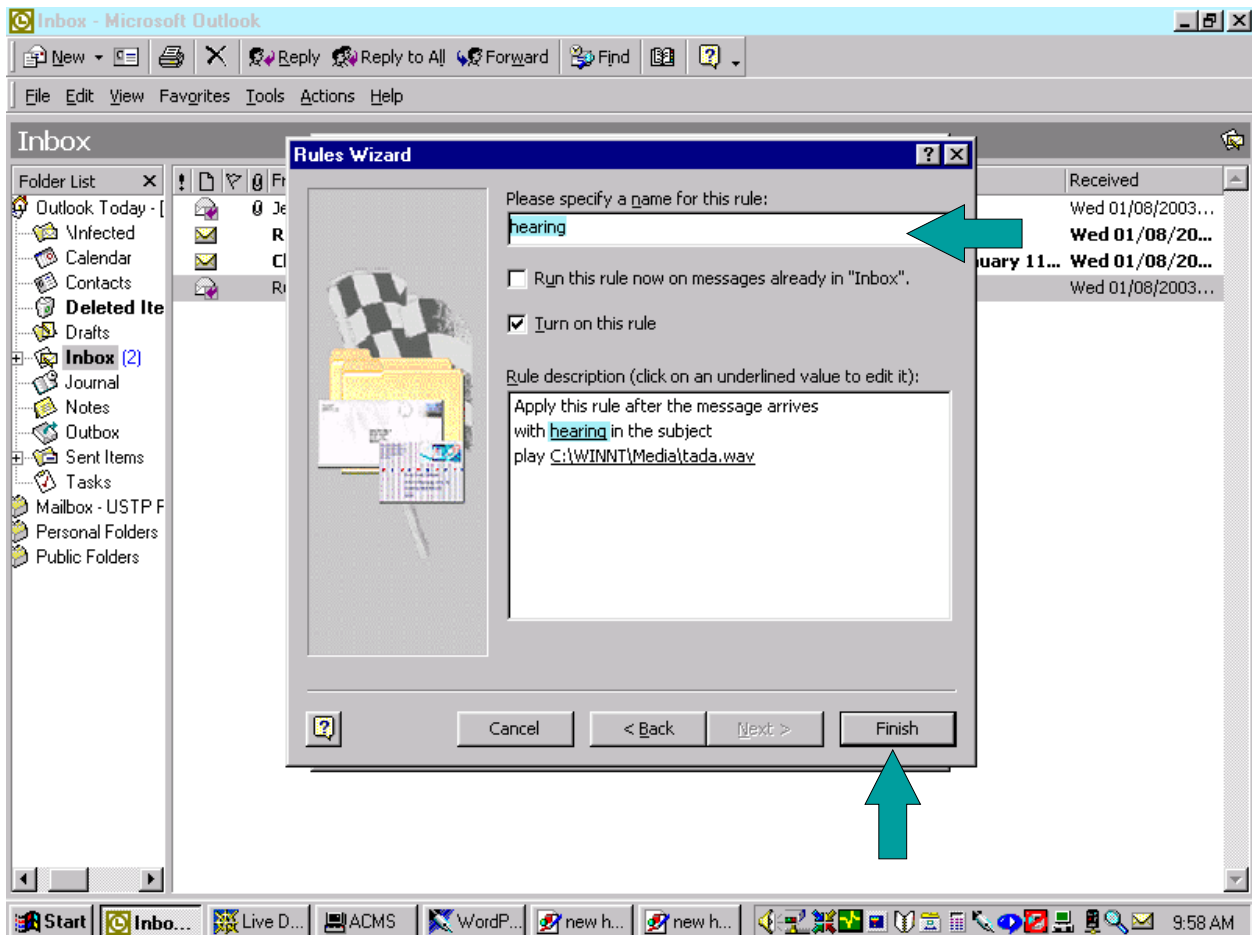
☞ At the “What do you want to do with the message?” screen highlight and select “Play a sound”





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.

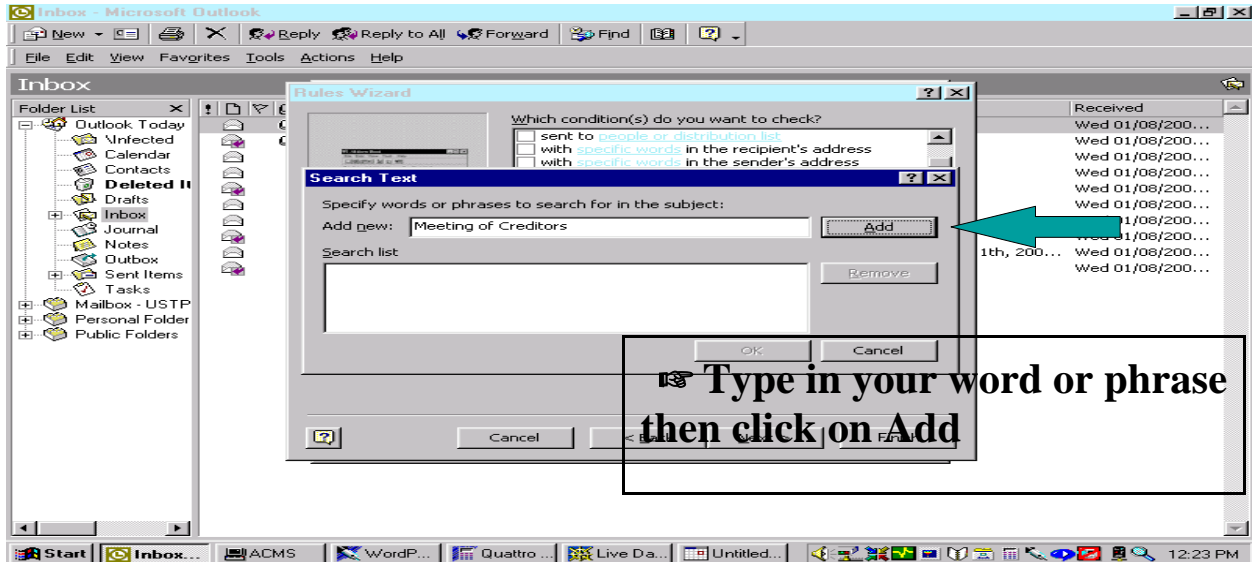


**With this rule whenever you receive a piece of electronic mail into your ECF mailbox that has the word “Hearing” in the subject the sound “tada” will play.**

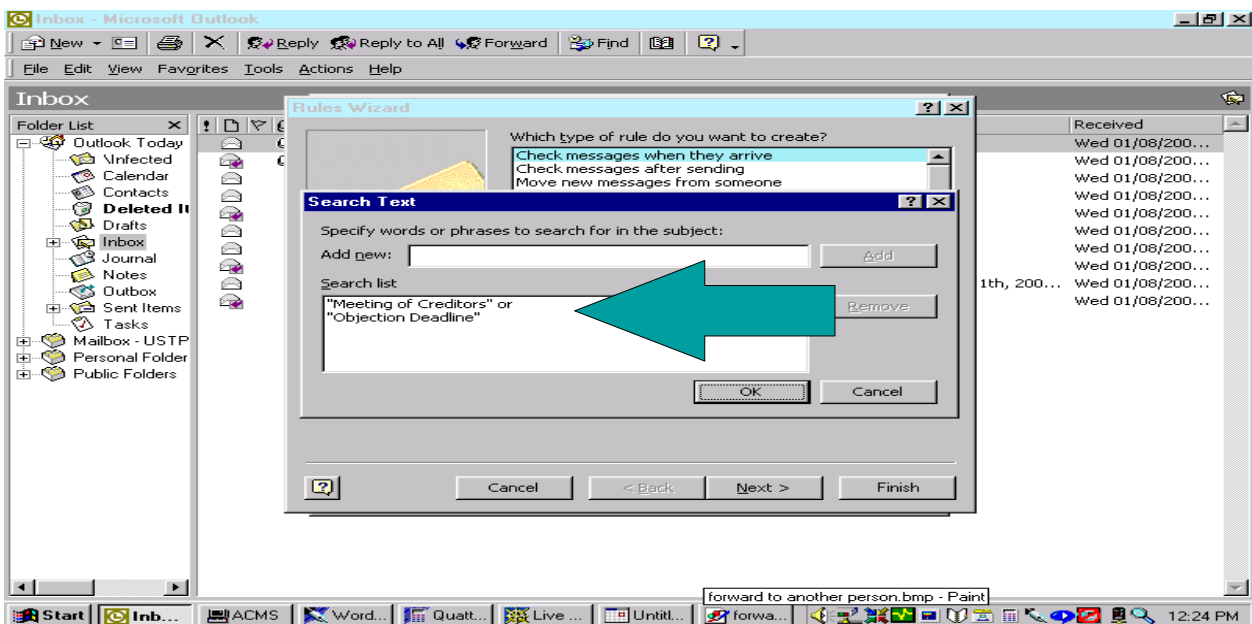
## EXAMPLE OF RULE AUTOMATICALLY FORWARDING E-MAIL TO ANOTHER PERSON

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 calendaring. To do this:

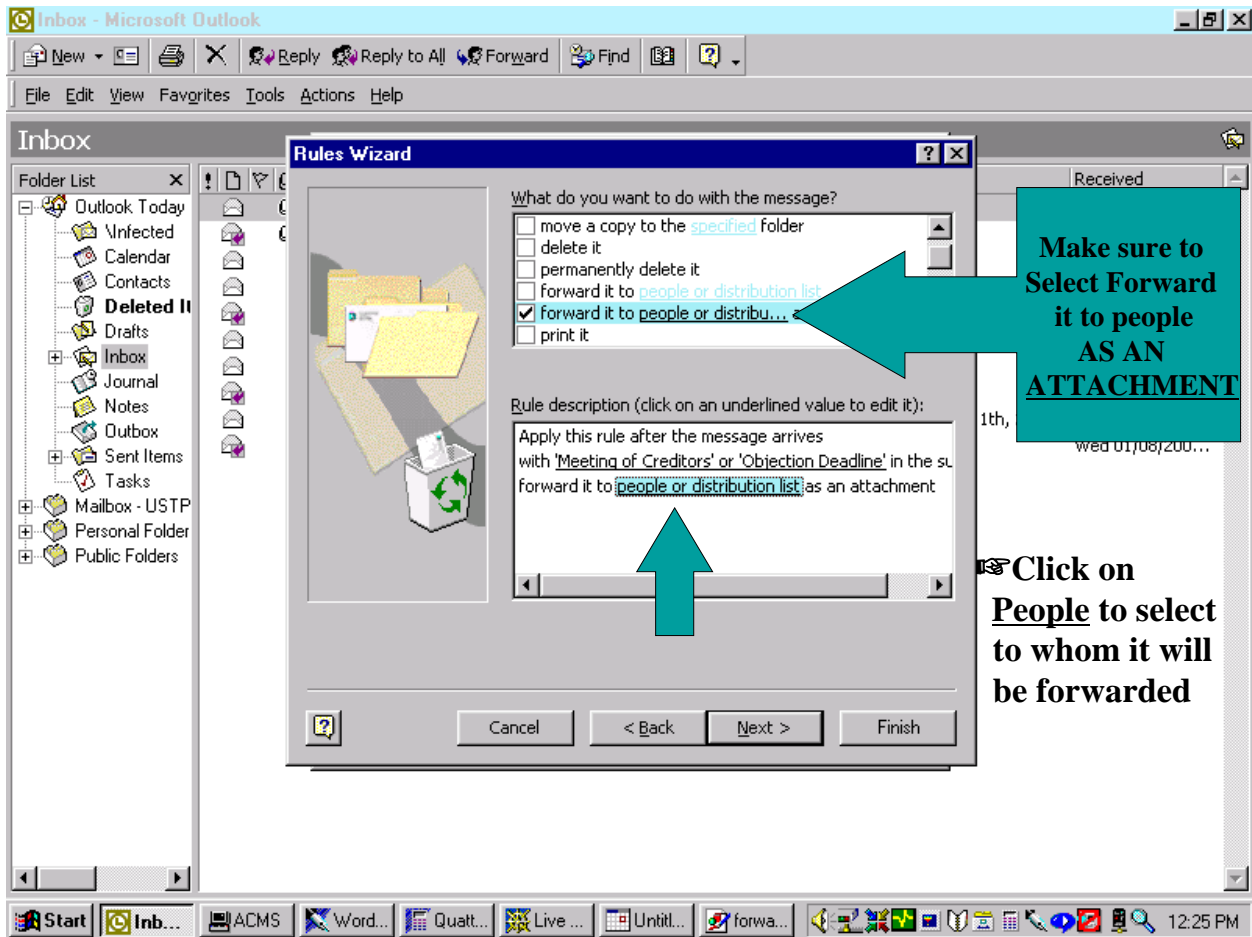
Follow the previous steps on pages 8 to 10. On page 10 where you are asked to insert a specific word or phrase we will input the word or phrase: Meeting of Creditors or Objection Deadline.



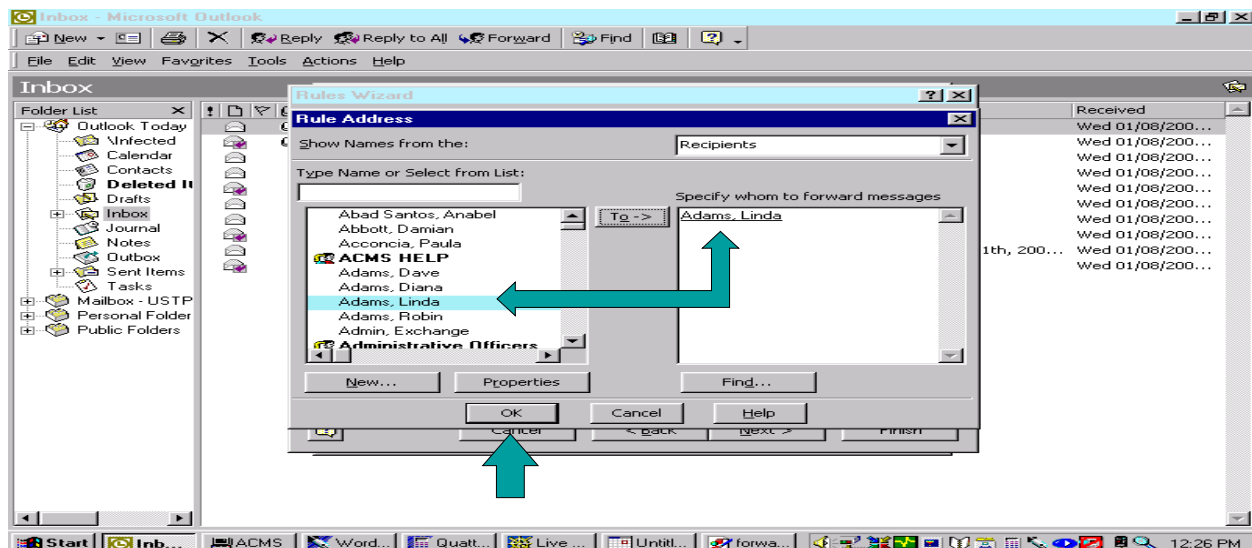
**You can use one rule for multiple scenarios. To do this just click the Add button and add another word or phrase. After you have completed them, click OK then click Next.**



☛ 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 to view the document, 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.

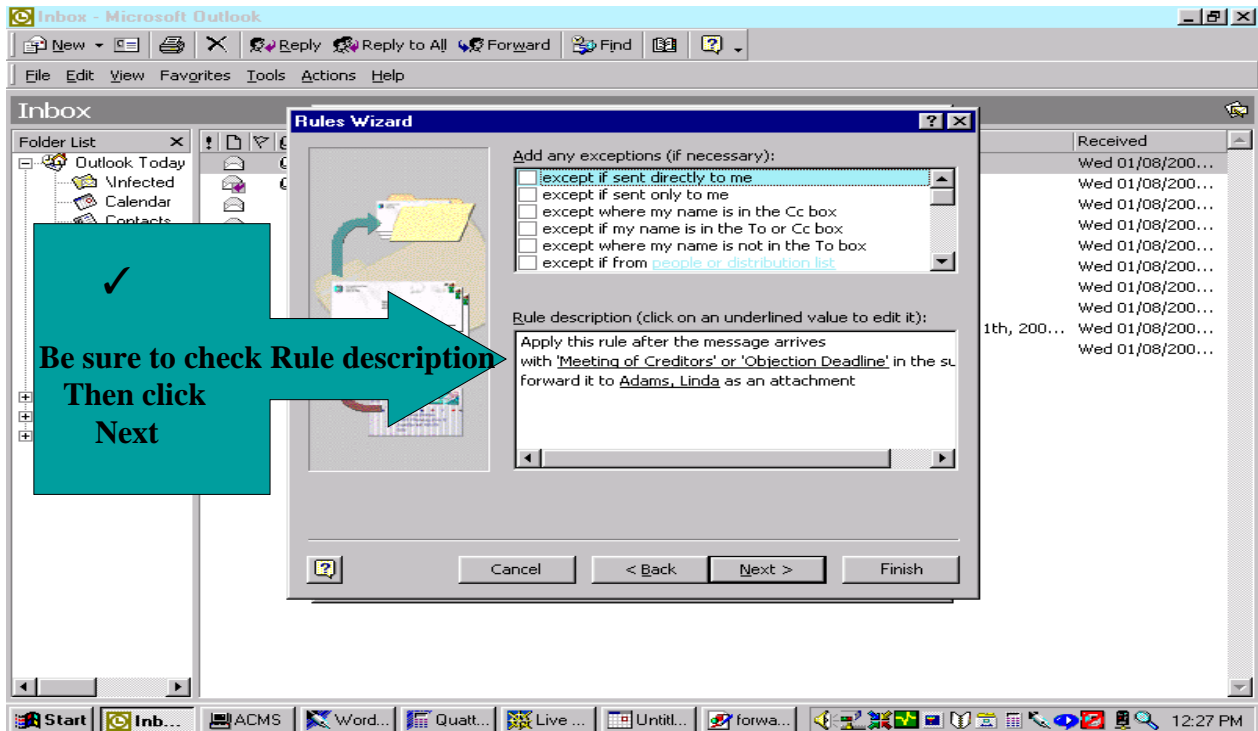


☛ From your distribution list, select the individual and click OK

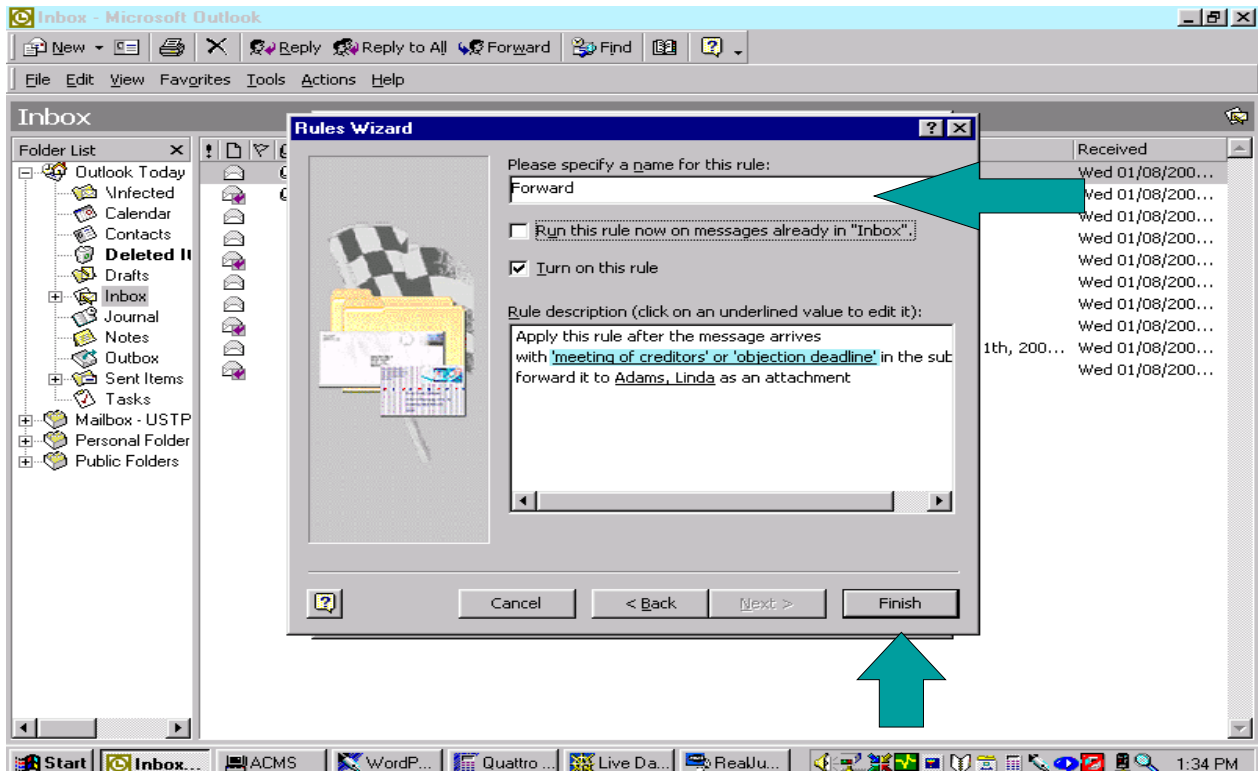




☞ Add any exceptions if applicable, otherwise, check the rule description for accuracy and click Next.



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

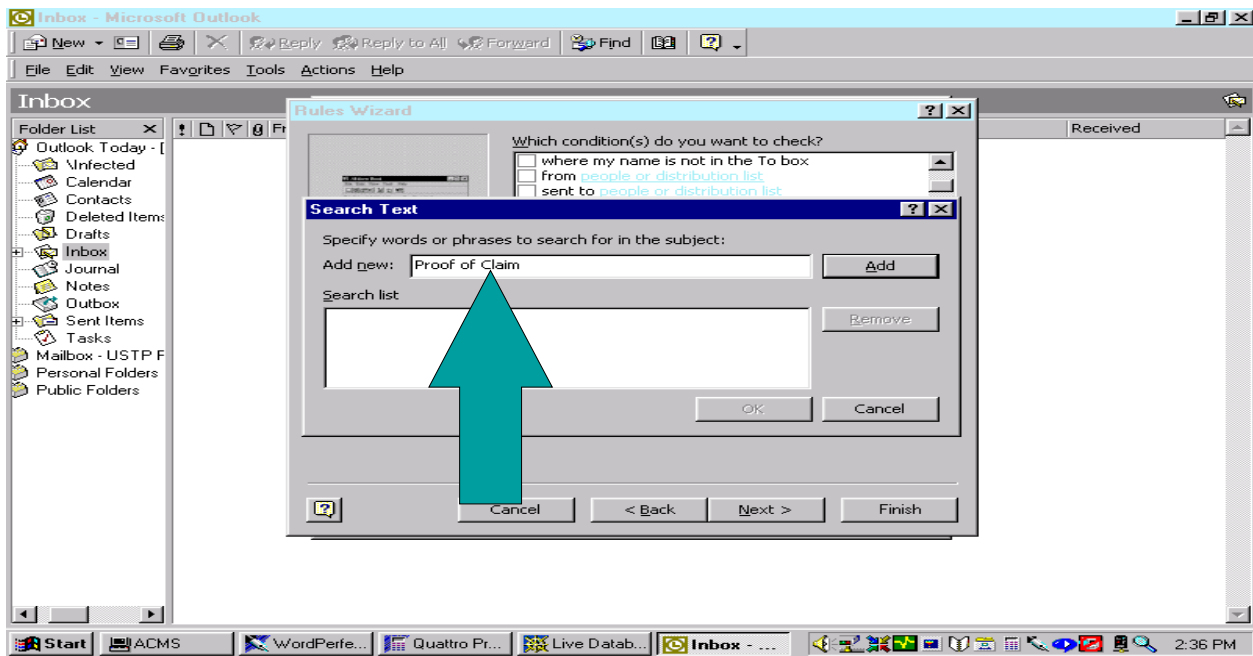


## EXAMPLE OF RULE FORWARDING SPECIFIC E-MAIL TO ANOTHER FOLDER

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.

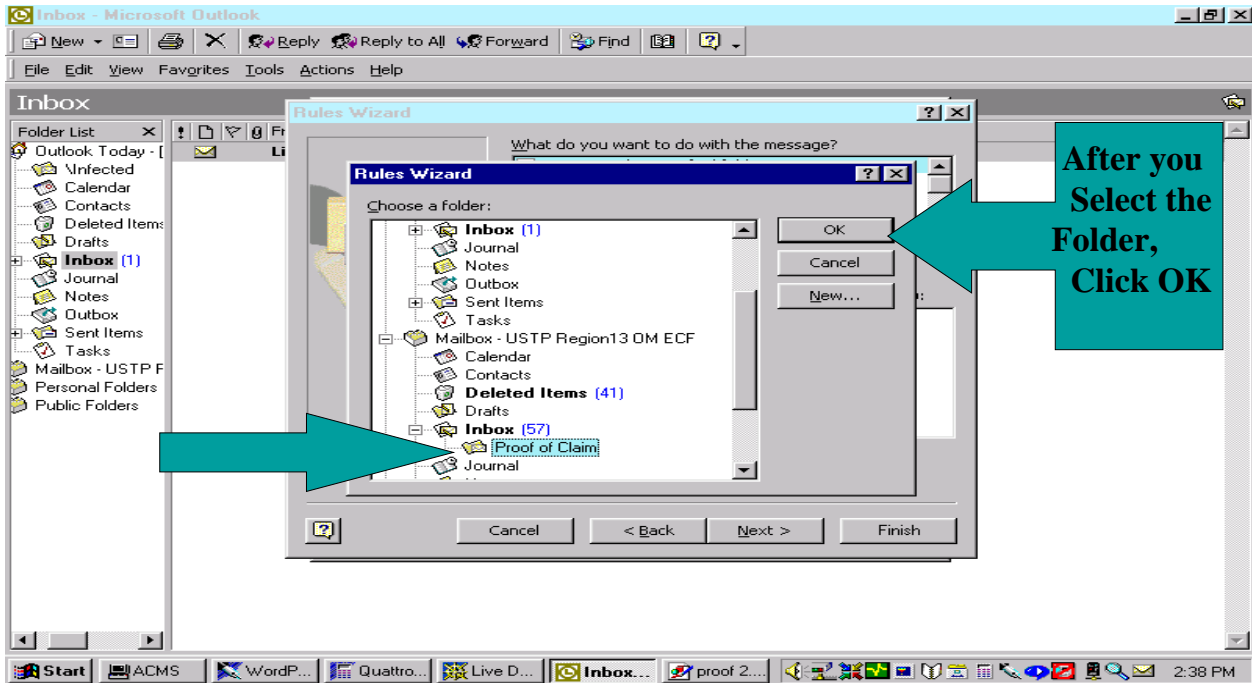
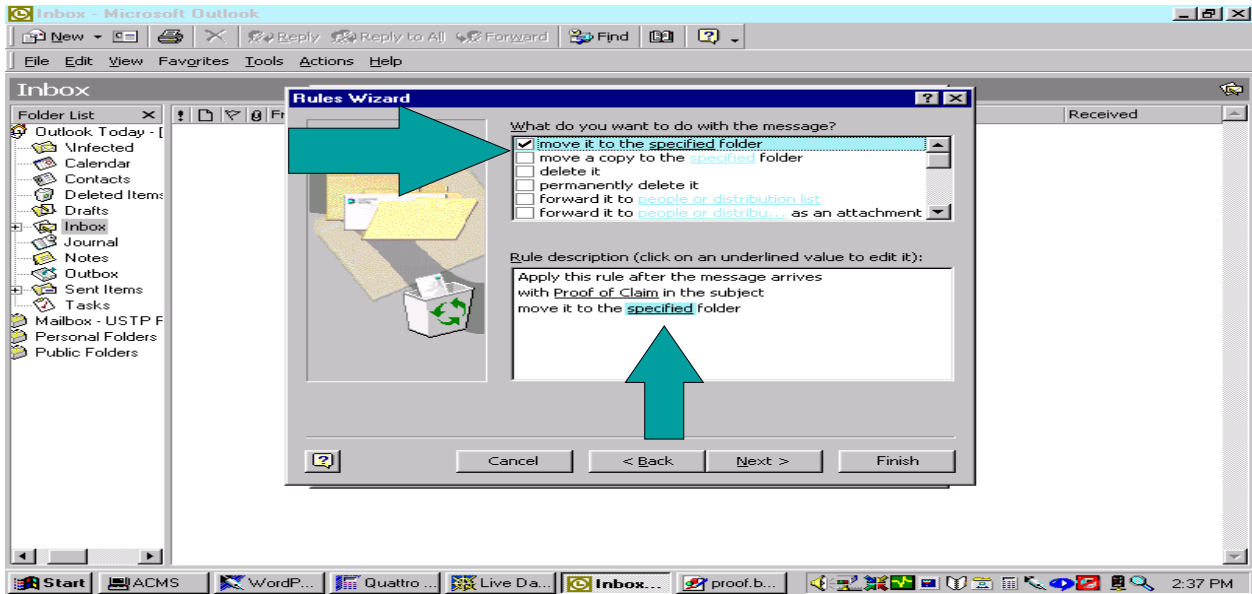
For this example we will assume that if a Proof of Claim is received through our ECF e-mail inbox we would like our computer to automatically move the e-mail to a special folder we have created called "Proof of Claim" so that it can be looked at on a later date.

Follow the previous steps on pages 8 to 10. On page 10 where you are asked to insert a specific word or phrase: insert your word or phrase. For our example we will insert the phrase: Proof of Claim.

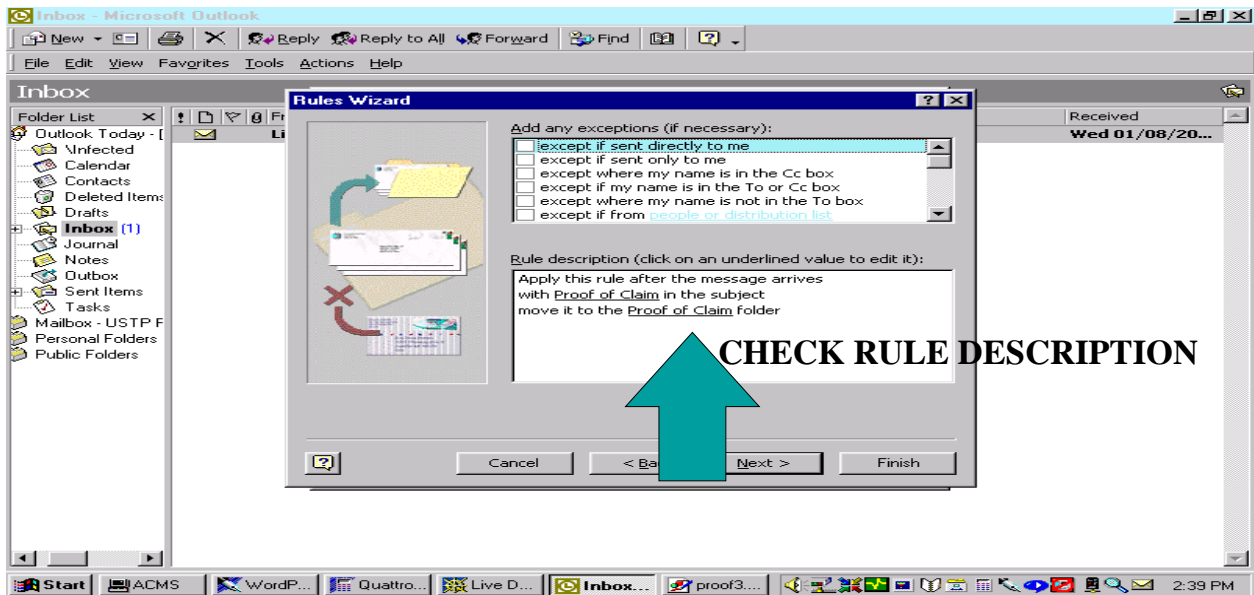


☞ After inputting word/phrase click on Add, then click OK

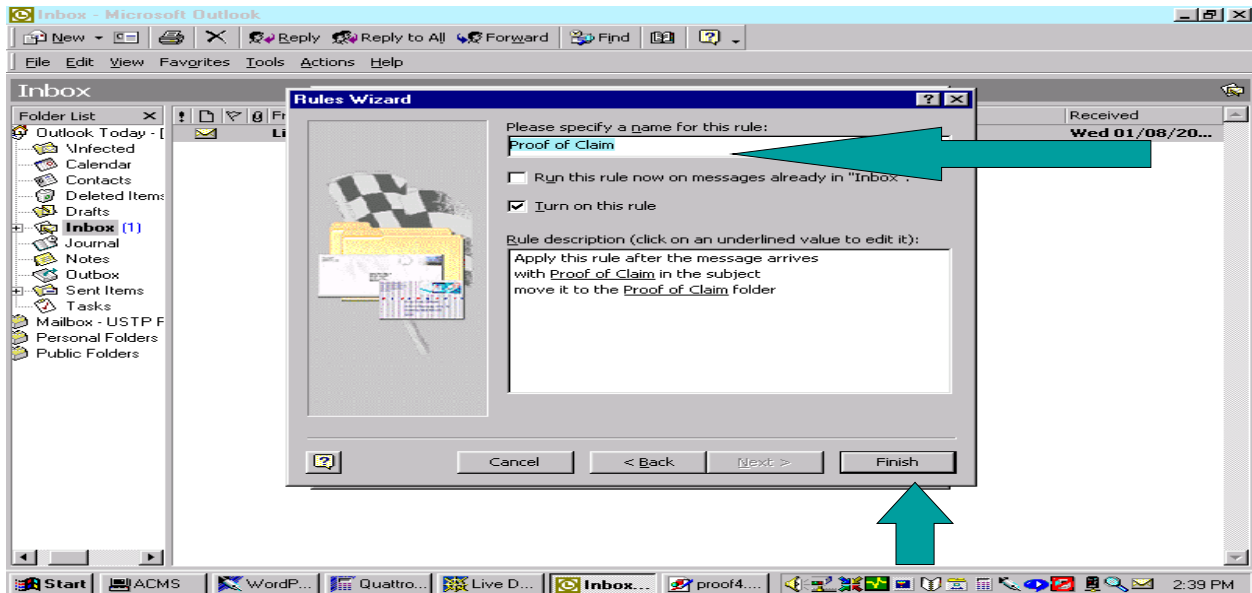
At the “what do you want to do with this message?” screen; highlight and select the Move to the specified folder. Click on the specified folder and select the appropriate folder.



☛ 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 then click on OK.

