



## Case Management/Electronic Case Filing Skills Assessment Checklist

(Please use separate form for each individual who will attend CM/ECF training)

Please use the following checklist to determine if you, and/or your support staff, have the skills you will need to use the Case Management/Electronic Case Filing system (CM/ECF). Please use a separate sheet for each attorney and staff member that will be using CM/ECF. This checklist will be used by the Clerk's Office to develop CM/ECF training classes that are appropriate for your skill level. Upon completion of this checklist and registration form, someone from the Clerk's Office will contact you to schedule training.

Name: \_\_\_\_\_ Position: \_\_\_\_\_

Law Firm: \_\_\_\_\_

Mailing Address \_\_\_\_\_ Phone No. \_\_\_\_\_/\_\_\_\_\_

1.	I know how to use a windows-based word processing software package such as Corel WordPerfect, Microsoft Word and/or a Windows-based bankruptcy forms software program. Specifically, I can: <input type="checkbox"/> Create documents like motions, orders, and other case correspondence <input type="checkbox"/> Find a specific file in a directory/folder	<input type="checkbox"/> Yes	<input type="checkbox"/> No
2.	I know how to access the Internet and how to use an Internet Browser like Microsoft Internet Explorer or Firefox from my office computer. Specifically, I can: <input type="checkbox"/> Go to a specific site, like the Court's web site at: www.wiw.uscourts.gov/bankruptcy <input type="checkbox"/> Use the <i>Forward</i> and <i>Back</i> buttons <input type="checkbox"/> Follow a link from one page to another <input type="checkbox"/> Click on check boxes using my mouse <input type="checkbox"/> Type in text boxes <input type="checkbox"/> Print a web page	<input type="checkbox"/> Yes	<input type="checkbox"/> No
3.	I know how to view/read a Portable Document Format (PDF) file using Adobe Acrobat Reader software. Specifically, I can: <input type="checkbox"/> Use Adobe Reader's print and save features <input type="checkbox"/> Create and save a PDF document from my word processing software or bankruptcy software <input type="checkbox"/> Scan a document and save it as a PDF file	<input type="checkbox"/> Yes	<input type="checkbox"/> No
4.	I know how to use my office e-mail system. Specifically, I can: <input type="checkbox"/> Use e-mail to open and read a message <input type="checkbox"/> Use e-mail to create and send a message <input type="checkbox"/> Send e-mail with attached files <input type="checkbox"/> Send the same e-mail message to more than one person at a time <input type="checkbox"/> Maintain e-mail account by saving and deleting messages	<input type="checkbox"/> Yes	<input type="checkbox"/> No

**For your benefit and the benefit of others, please complete the CM/ECF Computer Based Training modules before attending training.** You may contact the Clerk's office to obtain a CD or go to our website at: [www.wiw.uscourts/bankruptcy/training.htm](http://www.wiw.uscourts/bankruptcy/training.htm). Please contact Terry Payne at (608) 264-5178 Ext: 5730 or Susan Hoffman at (715) 839-2980 Ext: 115 if you have any questions about this checklist.

Please return this checklist along with your registration form to:  
U.S. Bankruptcy Court, Attn: Jolene Hawkins  
120 N. Henry St., Room 340, P.O. Box 548, Madison, WI 53701-0548