

**ATTORNEY – Quick Reference Guide**

**Involuntary Bankruptcy Case Opening**

| Step | Action   |
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| 1    | Click on the <b>Bankruptcy</b> hyperlink   |
| 2    | Click <b>Open an Invol Case</b>  |
| 3    | <p>The <b>Open Involuntary Bankruptcy Case</b> screen will display the following statistical fields:</p> <ul style="list-style-type: none"> <li>• Case type is <b>bk</b></li> <li>• The current <b>Date filed</b> is displayed</li> <li>• Select the <b>Chapter</b> from the pick list box,</li> <li>• <b>Joint Petition</b> is <b>n</b> (no)</li> <li>• The <b>Case Number</b> will be generated at the end of this process and will be displayed on the Notice of Electronic Filing</li> <li>• When this screen is correct - click <b>NEXT</b></li> </ul>  |
| 4    | The <b>Search for a debtor</b> screen displays.  |
| 5    | Enter a social security number, tax Id or Last/Business name to search for the party - Click <b>Search</b>   |
| 6    | <p>If the system finds the correct party, highlight the party's name in the <b>Party Search Results</b> window, and click <b>Select Name from List</b> to add the party to the case.</p> <p>If the system <u>does not</u> find the party, it will display a message <b>No person found</b>. Click <b>Create New Party</b> to add the party to the case.</p>  |
| 7    | <p>Click <b>Create New Party</b> to add the debtor to the case.</p> <ul style="list-style-type: none"> <li>• The <b>Debtor Information</b> screen displays</li> <li>• Enter the debtor's <b>Name</b> and <b>Address</b> information using upper and lower case.</li> <li>• Select the debtor's <b>County</b> of residence from the pick list box</li> <li>• The Country, Phone Number, Fax Number and E-Mail fields are left blank.</li> <li>• If the debtor has an alias, click the <b>Alias</b> button and enter the information. <b>Alias Role</b> selections include aka,dba, fdba and fka.</li> <li>• Click <b>Add Aliases. See step 8</b></li> <li>• If the debtor is a business and has a <b>Corporate Parent</b>, click the <b>Corporate parent/affiliate</b> button, enter the business name and search, create and add the Corporate Parent to the case.</li> <li>• Click <b>Add Corporate Parent. See step 8</b></li> </ul> |

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| 8  | <p>The <b>DEBTOR INFORMATION</b> screen reappears</p> <ul style="list-style-type: none"> <li>• Click on the <b>Review</b> button to present a screen that summarizes the alias activity for this debtor.</li> <li>• Verify the information</li> <li>• Click <b>Return to Party Screen</b></li> </ul> <p>The <b>DEBTOR INFORMATION</b> screen will return. If the appropriate information has been added and is correct for the debtor, click <b>Submit</b> to continue</p> |
| 9  | <p>The <b>Search for a petitioning creditor</b> screen displays</p>  |
| 10 | <p>Enter a social security number, tax Id or Last/Business name to search for the party – click <b>Search</b></p>  |
| 11 | <p>If the system finds the correct party, highlight the party’s name in the <b>Party Search Results</b> window, and click <b>Select Name from List</b> to add the party to the case.</p> <p>If the system <u>does not</u> find the party, it will display a message <b>No person found</b>. Click <b>Create New Party</b> to add the party to the case.</p>  |
| 12 | <p>Enter or verify the party name. Remove party information (if any) such as address and county.</p>   |
| 13 | <p>If you represent the petitioning creditor, check the box <b>The user opening the case is the filing attorney for this party</b> and click <b>Submit</b>. <b>Go to step 18</b>.</p> <p>Otherwise, Click <b>Attorney</b> to add attorney for the <b>petitioning creditor</b>.</p>   |
| 14 | <p>Enter Attorney’s last name. Click <b>Search</b> to continue</p>   |
| 15 | <p>The <b>Attorney search results</b> screen displays. Click to highlight the attorney name. Click <b>Select name from list</b> click <b>Add Attorney</b> to add attorney for the party.</p>   |
| 16 | <p>The screen appears again. Review the information by clicking the <b>Review</b> button to verify the information for the party being added. Click <b>Return to Party Screen</b></p>  |
| 17 | <p>Click <b>Submit</b> if the information is correct. If the information is incorrect click the browser <b>Back</b> button to find and correct the error and proceed with the event.</p>   |
| 18 | <p>The <b>Search for a petitioning creditor</b> screen displays again. <b>REPEAT Steps 9 – 18 to add all petitioning creditors</b>. When all petitioning creditors have been added, click <b>End petitioning creditor selection</b>.</p>   |
| 19 | <p>A screen showing the Divisional Office and the county code will appear – click <b>Next</b></p>  |

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| 20 | <p>The <b>STATISTICAL DATA</b> screen appears next.</p> <ul style="list-style-type: none"><li>• Select <b>Nature of debt</b></li><li>• Select the <b>Type of Debtor</b> by clicking in the appropriate radio button</li><li>• If a business, click the appropriate checkbox under <b>Nature of Business</b></li><li>• Click <b>Next</b> to continue</li></ul> |
| 21 | <p>Click <b>BROWSE</b> on the PDF Document Selection screen to launch the Adobe Acrobat Reader. Locate and Verify the document you wish to attach to this entry – click <b>Open</b> to attach the correct PDF.</p> <p><b>NOTE:</b> To view the document select the correct <b>PDF, Right Click</b> and <b>Click Open</b></p>                                  |
| 22 | <p>The <b>RECEIPT#</b> screen appears.</p> <ul style="list-style-type: none"><li>• Leave the <b>receipt</b> field <b>blank</b> and click <b>Next</b> to proceed with the filing and to make an <b>Internet Payment</b>.</li></ul>   |
| 23 | <p>Click <b>Next</b> at the blank screen</p>  |
| 24 | <p>Verify that the <b>Final Docket Text</b> is correct.</p> <ul style="list-style-type: none"><li>• If correct – click <b>Next</b></li><li>• If incorrect – click the browser <b>BACK</b> button until you find the error(s) and proceed with the event</li></ul>   |
| 25 | <p>The <b>Summary of Current Charges</b> screen will pop up over the Notice of Electronic Filing screen. Click <b>Pay Now</b> to pay the bankruptcy case fee or click <b>Continue Filing</b> and pay the outstanding fee by the end of the day</p>  |