# BANKRUPTCY DOCUMENTS

Getting Started

## WHAT IS BANKRUPTCY DOCUMENTS? (BK DOCS)

Bk Docs is a secure file transfer service provided by your Trustee to receive various documents.

Bk Docs provides an encrypted method of transfer from your computer to the Trustee's system. Documents which may contain sensitive information are protected against unauthorized access using Bk Docs.

### **BK DOCS REGISTRATION**

User Registration and User Login



To begin your registration for Bk Docs , enter your email address on the registration page.

Access the registration page by clicking "Register" from any page on the bkdocs.us site.



Provide your e-mail address to begin account registration. After receiving the e-mail verification, click the link in the message to enter your account details.

E-Mail:	1		
Regist	er		

Are you a Trustee? Interested in becoming a 13 Documents participant? Contact sales@13documents.com for more information.

🕲 Independence Software, 2017 🚔 PO Box 31244, Alexandria, VA 22310-0944

Privacy Statement | Terms of Use





Provide your e-mail address to begin account registration. After receiving the e-mail verification, click the link in the message to enter your account details.



Are you a Trustee? Interested in becoming a 13 Documents participant? Contact sales@13documents.com for more information.

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Clicking "Register" will generate an email containing a validation link.

## You MUST click the validation link to complete your registration.

Your validation email is sent immediately. If not displayed in your Inbox after 5 minutes, check your SPAM/Junk folders.

### VALIDATING YOUR REGISTRATION

	Sign-in / Login	Register	M
A Home / Account Registration			
Trustee / Filer Account Registration			
Provide your e-mail address to begin account registration. After receiving the e-mail verification, click the link in the message to enter your account details.			
Account already exists. Forgotten password?			
E-Mail:			
Register			
Are you a Trustee? Interested in becoming a 13 Documents participant? Contact sales@13documents.com for more information.			

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If you enter an email address which already exists in the Bk Docs software, you will be notified.

If you did not attempt to register previously and believe this message is in error, please contact Bk Docs support.

#### support@13documents.com

### ACCOUNT ALREADY EXISTS

		Sign-in / Login	Register	-
Account Registration				
Pi Ve	Trustee / Filer Account Registration rovide your e-mail address to begin account registration. After receiving the e-mail erification, click the link in the message to enter your account details.			
	Success! Please check your e-mail for further instructions.			
AC	re you a Trustee? Interested in becoming a 13 Documents participant? ontact sales@13documents.com for more information.			
🕲 Independence Software, 2017 🚔 PO Box 3	31244, Alexandria, VA 22310-0944	Privacy Stateme	ent   Terms of	Use

Your email address has been registered. An email will be sent with validation instructions.

### **REGISTRATION SUCCESS**

ments.com@mailgun.org on behalf of 13 Documents Support <support@13documents.com>

its | Registration

with how this message is displayed, click here to view it in a web browser.



REGISTRATION

### **13 Documents Registration**

YOUR REGISTRATION IS NOT YET COMPLETE! You MUST click the "Activate Now" button to finish your account registration.

Your registration has been received! Before you may access your new account, you must activate. Activating your account will take only a few moments.

Your account is locked until you complete activation. Use the button below to activate your account. During activation you will create a password and register with one or more Trustee's.

#### Activate Now

Contact Info: Email: support@13documents.com Address: P.O. Box 31244 Alexandria, VA 22310

**Terms | Privacy** 

VALIDATION EMAIL EXAMPLE

	Sign-in	/ Login Register	1 <b>4</b>
A Home / Registration Details			
Registration Details	e registration.		
Username:			
First Name:			
Last Name:			
Company / Firm:			
Address:			
City:			
State: Alabama	Ŧ		
Zipcode:			
Telephone:			
<b>Registration:</b> 07/20/2018			
Timezone: (GMT -5:00) Eastern Time	¥		
Passwords:         Must be at least 8 characters in length;         Must contain at least one (1) number;         Must contain at least one (1) Uppercase letter.         Password         Repeat			
Update			
	Privac	y Statement   Terms of	Use

- Clicking "Activate Now" from the Validation Email will prompt you to complete your account information.
- All fields, except "Company / Firm", are required.
- Fields with a red border require attention.
- Click "Update" when all required fields have been completed.

### REGISTRATION ACCOUNT DETAILS



Your registration is almost complete. Use the form below to provide your account details to complete registration.

Username:	supermatako@gmail.com
First Name:	Justin
Last Name:	Crone
Company / Firm:	
Address:	974 Harrison Cir
City:	Alexandria
State:	Virginia
Zipcode:	22304
Telephone:	2676793931
Registration:	07/20/2018
Timezone:	(GMT -5:00) Eastern Time

### COMPLETE REGISTRATION

- Your registration is complete.
- Clicking "Request Trustee Access" will direct you to the Trustee Authorizations page.

Keith Rucinski	Request
Albert Russo	Request
William K. Stephenson	Request
Mary Ida Townson	Request
Tim Truman	Request
Test Trustee	Request
Mary K. Viegelahn	Request
7	

### Click "Request" next to Michael H. Meyer to upload documents.

Keith Rucinski		Request
Albert Russo		Request
William K. Stephenson		Request
Mary Ida Townson		Request
Tim Truman		Request
Test Trustee	Approved	
Mary K. Viegelahn		Request

Once approved, the Trustee's name will be highlighted in green.

rg on behalf of 13 Documents Support <support@13documents.com> Notice

played, click here to view it in a web browser.

13 🕥 DOCUMENTS

TRUSTEE AF

Hi, Justin

13 Documents Trustee Approval.

YOU'VE BEEN APPROVED! You have been approved to upload documents with Test Trustee.

### 13 Documents Trustee Approval

You have been approved to upload documents with your Trustee, **Test Trustee**. You m begin uploading documents to your Trustee immediately. Login to 13 Documents now u the button below.



Terms | Privacy | Unsubscribe

# APPROVAL NOTICE

An email notice will be sent once you've been approved by you Trustee.

Once approved by your Trustee you can begin uploading documents.

### UPLOADING DOCUMENTS TO THE TRUSTEE

- Documents must be in Adobe Acrobat (PDF), Excel, or Image (JPEG) format.
- > Maximum file size for a single document is limited to 25mb (megabytes).
- > You must have a valid case number to upload a document.
- > A maximum of 10 documents/files may be uploaded in a single batch.

## UPLOAD BASIC INFORMATION

## ONCE YOU LOG IN YOU WILL SEE YOUR HOME SCREEN

- YOU WILL THEN SELECT "CASE CHECK LIST" ON THE LEFT HAND SIDE OF THE SCREEN.

Home	Home	Getting Started	Bulletins
Document Upload	Home		
→ Case Check List New	Welcome, Michael M	eyer to 13 Documents.	
Debtor Education New	13 Documents Version 2.9		
Trustee Authorizations	Our new site provides an easy to na may:	vigate and modern design to our software	e. Using the controls to the left, you
Documents Report	Document Upload		
Document Inbox	<ul> <li>Documents Report</li> <li>and Update your Account Info</li> </ul>	ormation	
Account	New features are being added all th	e time check your Inbox regularly for notic	ces from 13 Documents about
HELP	upcoming features. Be sure to white so you don't miss important notices.	list our email, support@13documents.com	n, in your SPAM filtering software
	Not sure where to start? Review	our Getting Started guide for more info access, document history, and more!	ormation on registration, Trustee

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### YOU WILL TYPE IN THE CASE NUMBER FOR THE CASE YOU WISH TO UPLOAD DOCUMENTS

- No hyphen or extra digits
- Just the 7 digits of the case number

Home	Case Check List
Document Upload	Please enter your case number to begin. If your Trustee has provided a check list for this case, the list will be presented below. You may return at any time to check on the status of the items or to upload additional items.
Case Check List New	Case number Reset
Debtor Education New	No hyphens or Judge initials.
Trustee Authorizations	(0.4. 0120100)
Documents Report	
Document Inbox	
Account	
HELP	

### Case Check List

Please enter your case number to begin. If your Trustee has provided a check list for this case, the list will be presented below. You may return at any time to check on the status of the items or to upload additional items.

777	77777		Reset	Case number: //-////
No	No hyphens or Judge initials. (ex. 0123456)		idge initials. 456)	Trustee: Michael H. Meyer Debtor name(s): PORTAL TESTING DOCUMENT DELIVERY
			Legend:	C (Completed), R (Requested), N/A (Not Applicable)
с	R	N/A	Trust Docu	ments
			For all trusts with all ame	s in which you are a beneficiary or settlor, provide a copy of the trust document endments and a list of the trust assets.
	Attach			
	N/A			
С	R	N/A	Business T	ax Returns
	$\checkmark$		All pages of debtor has a	the last two Federal and State Tax Returns filed for all entities in which the an interest. (All LLC, LLP or Corporate Tax Returns).
	Attach			
	N/A			

- As the case number is entered, a box will appear with the case number and the debtor(s) name.
- Select this pop-up if it matches the case you are looking for
- Once selected the site will take you to a page as seen to the left
- The Trustee's office will have boxes marked letting you know which documents we need and/or are requesting for this individual case
  - Much like the Document Request Letter that has been sent in each case over the past year +

- ✓ If the box under the "R" is checked then the document is being requested.
- You will click on the Attach button under any document heading that has been requested
- A separate window will appear.
- In the comment box you can add small notes or descriptions pertaining to the document you will upload
- ✓ You will then select Browse and find select the file you wish to upload

С	R	N/A	
С	R	N/A	Trust Documents
			For all trusts in which you are a beneficiary or settlor, provide a copy of the trust document with all amendments and a list of the trust assets.
	Attach		
	N/A		
Attacl	h File		×
Trust E	Document	ts	
Comm	ent:		
Relate	d Docume	ent Num:	
Selec	ct file		🖆 Browse
Multiple	e uploads	available	for this check list item.

- When the document is selected and in an approved format the box will highlight blue.
- ✓ You can now select Upload.
- The box will remain after upload in case other documents are need under than particular request.

Attach File			×
Trust Documents			
Comment:			
Related Document Num:			10
T7-77777 TEST DOCUMENT.pdf	🛱 Remove	Upload	Browse
Multiple uploads available for this check list item.			
			Close

# The section that you uploaded the document to will now appear as such:

С	R	N/A	Trust Documents
			For all trusts in which you are a beneficiary or settlor, provide a copy of the trust document with all amendments and a list of the trust assets.
Last submitted: 2020-11-20 15:34:28		ted: :34:28	
	Attach		

✓ If the document requested is not applicable to the case then you can mark the "N/A" box and it will appear as shown on the right below



### **Document Upload**

#### 0\_1732305\_2290\_Other.pdf

100%

File uploaded successfully.

THIS IS NOT A CONFIRMATION/RECEIPT OF ACCEPTANCE!

Get an upload certification for document serial DOC13000000000000476 (this link expires after 5 minutes)

#### **Upload Additional Files**

If an error occurred during your upload, a message would be displayed below the progress bar with a description of the issue.

Clicking the serial number will display an upload receipt. (THIS RECEIPT CONFIRMS THE DOCUMENT HAS BEEN RECEIVED BY Bk Docs, NOT YOUR TRUSTEE.)

#### Certification of Document Receipt 13 DOCUMENTS HAS RECEIVED YOUR FILE

#### Document serial number: DOC13000000001090476

This is the serial number which has been assigned to your document. Use the serial number to reference this upload with the Trustee or 13 Documents staff.

Original Filename:	0_1732305_2290_Other.pdf
Received Date:	Saturday, July 21st 12:37:18 PM (local)
Document Type:	Other - Miscellaneous
Uploaded by:	Justin Crone <supermatako@gmail.com></supermatako@gmail.com>
In-Transit for:	Test Trustee
	123 Trustee Dr.
	Trusteeville, AL 12345-0000
	<u>P:</u>

13 Documents does not make any guarantee to the accuracy of the information provided by the filer for any purpose.

#### NOTICE

To protect personally identifiable information, this document was encrypted immediately upon receipt. The 13 Documents staff is unable to view the contents of this document. Any change requests regarding this document, the content of, or the details (i.e. document content, case number, or document type) cannot be made. You must contact the Trustee to effect changes to this document.

Close

### Your document receipt will contain:

### Your file name

- Date/time received by Bk Docs
- Document type selected
- Who uploaded the document
- The Trustee which was chosen

### RECEIPT EXAMPLE

## FINDING FILLABLE FORMS

- In some cases, court approved forms are needed:
  - Class 1 Checklist
  - Authorization to Release Information
  - Domestic Support Obligation Checklist (DSO Checklist)
  - Business Case Questionnaire
- ▶ To find these forms, you will log into your Bkdocs account.
- Select "Document Upload" from the menu on the right-hand side of your screen.



You will select "Meyer, Michael H." from the Trustee Drop-down menu.



Once this is done, you will see a "Fillable Forms Available!" (green box) appear to the right.



### You will be taken to this screen, where you can select a form to save and fill out for upload to the Trustee through the Case Check List section.

### Fillable Forms

The following fillable forms have been made available by Michael H. Meyer

Fillable Forms List

Click the description of the form you wish to view. This form should contain a send/submit button which will upload the completed document to the Trustee via bkdocs.us. You will be required to enter your username/password when submitting the document, even if you are currently logged into Bankruptcy Documents.

The Trustee may have provided additional instructions in the form. If you have questions regarding the form content please contact the Trustee directly. If you experience issues submitting the form, contact support@bkdocs.us.

#### AUTHORIZATION TO RELEASE INFORMATION FORM

CLASS 1 CHECKLIST

BUSINESS CASE QUESTIONNAIRE

DOMESTIC SUPPORT OBLIGATION FORM (DSO)

### USING BK DOCS DOCUMENT HISTORY



Your upload history contains a list of documents uploaded.

## VIEWING YOUR UPLOAD HISTORY

- Case number: The case number which the document is associated with.
- Received: Date & time the document was received by Bk Docs (adjusted for local time zone).
- Download: Date & time the document was downloaded by the Trustee (if date & time is all zeros, the Trustee has disabled display of this field).
- > Type: The document type assigned during upload.

DOCUMENT HISTORY EXPLAINED

### 13 Documents | Filer Account

Case	Received	Download	Туре
1732305	2018-07-21 12:37:18	0000-00-00 00:00:00	Other - Miscellaneous

- > Trustee: Displays the name of the Trustee the document was assigned to.
- Serial Number: The serial number generated for this document. Can be used for tracking purposes.
- > Size: The size of the file uploaded.
- Comment: If provided during upload, will be displayed.
- > Original Filename: The file name of the document on your computer which was used for upload.

Trustee	Serial Number	Size	Comment	Original Filename
Test Trustee	DOC13000000001090476	124213 KB		0_1732305_2290_Other.pdf



- Completed: Document History
- Next: Document Exchange
  - Available in the August 2018 update

## SECTION COMPLETE

## USING BK DOCS DOCUMENT INBOX

What is "Document Inbox"?



### DOCUMENT(S) AVAILABLE SENT BY YOUR TRUSTEE(S)

#### **Document Inbox**

This is your Document Inbox. Documents provided by the Trustee will be displayed here. You may download or print these documents. Some documents have an expiration set by the Trustee, if a document has an expiration, the file will be available to view/print until the expiration date has passed.

Show 100 v entries			Search:		
Case	Received			Trustee	
1732305	07/21/2018 1:09 PM			Test Trustee	View
Case	Received			Trustee	
Showing 1 to 1 of 1 e	entries				
		Previous	Next		

- Documents which have been sent by your Trustee(s) will be available through Document Exchange.
- You may view your documents by clicking "View".
- Documents may expire after viewed. Contact your Trustee for details.

## VIEW AVAILABLE DOCUMENT(S)



### Completed: Document Exchange

Next: Account

## SECTION COMPLETE

## USING BK DOCS ACCOUNT

Updating Account/Login Information

#### Jount Details

our account contact data. This information is used by the Trustee to verify your relation to cases administered by the Trust Please ensure this information is up-to-date.

E-Mail Address:	test@email.com	
	Change Password  Last changed: 2018-07-20	
Name:	Test Middle User	
Entity Name:		
Address 1:	P.O. Box 31244	
Address 2:		
Address 3:		
City:	Alexandria	
State:	Virginia	
Zipcode:	22310-0944	
Telephone:	8005555555	
Registration:	07/20/2018	
Timezone:	(GMT -5:00) Eastern Time	
	Update	

- All fields, except "Registration", may be updated to reflect your current information.
- Updating "E-Mail Address" will require you to logout of Bk Docs to update.
- Once you've completed your changes, click "Update" to apply the changes to your account.

### ACCOUNT DETAILS