



**MyCaseInfo<sup>®</sup>**  
**User's Guide**

An online bankruptcy questionnaire

## TABLE OF CONTENTS

I.	GET STARTED .....	3
	Log into your MyCaseInfo account	
	Confirm your registration	
II.	NAVIGATION BASICS	
	<b>Top Screen Tabs</b> .....	4
	<b>Left Sidebar</b> .....	4-5
	Flags	
	Tools	
	Help Center	
III.	THE QUESTIONNAIRE	
	<b>Begin a Section</b> .....	6
	<b>Answer Questions and Input Information</b> .....	6
	<b>Questionnaire Hints from your Attorney</b> .....	6
	<b>Incomplete Questions</b> .....	6
	<b>Review the Section</b> .....	7
	SECTION INSTRUCTIONS	
	<b>Personal Information</b> .....	8
	<b>Income</b> .....	9-11
	<b>Property</b> .....	12-14
	<b>Debts</b> .....	15-16
	<b>Expenses</b> .....	17-18
	<b>Miscellaneous</b> .....	19
	<b>Documents</b> .....	19
IV.	SEND THE QUESTIONNAIRE TO YOUR ATTORNEY .....	21
V.	RESUBMITTED QUESTIONNAIRE BY YOUR ATTORNEY .....	22
	<b>Needs Attention Notes from your Attorney</b> .....	22

## I. GET STARTED

Welcome to MyCaseInfo, the online bankruptcy questionnaire. MyCaseInfo is the easy way for you to submit your bankruptcy information online and send it to your attorney for review.

### Step 1: Log into your MyCaseInfo account

- Go to [www.mycaseinfo.com](http://www.mycaseinfo.com)
- Enter your username (email address)
- Enter your password. If you forgot your password:
  - Reset your password by clicking [Forgot your password?](#)
  - Enter the email address associated with your account and click [Send](#)
  - You will receive a new password by email

**Login Screen:** This is the window you first see when you go to the MyCaseInfo website. To access your account, enter your username and password. If you forgot your password, follow the steps at left.

### Step 2: Confirm your registration

The first time you login, you will be required to confirm your registration.

- Read the Notice to Consumer Debtor(s) under Section 342(b) of the Bankruptcy Code and the Important Information about Bankruptcy Assistance Services from an Attorney or Bankruptcy Petition Preparer
- Check both boxes once you have read the notices and click [Register](#)
- You are now able to start your questionnaire

✳ **TIP:** Review or print the Notices any time by clicking [Confirmation Agreement at the bottom of the page to open the PDF.](#)

**Login Screen:** This is the window you first see when you go to the MyCaseInfo website. To access your account, enter your username and password. If you forgot your password, follow the steps at left.

## II. NAVIGATION BASICS

Navigating MyCaseInfo is easy and simple to do.

### Top Screen Tabs

The tabs at the top of the screen allow you to easily go from one section of the questionnaire to another. There is also a tab for submitting the completed questionnaire to your attorney and a tab to log out.

- Colored tabs indicate that you have not yet completed that section
- Gray tabs indicate that section has been completed
- Tabs highlighted in yellow show you the section you are currently working on

### Left Sidebar

The left sidebar provides important tools at your fingertips:

- **Flags**  
While completing the questionnaire, you may have a question regarding whether a particular question applies to you or what kind of information you should input. By using Flags, you and your attorney can easily correspond on specific questions without leaving MyCaseInfo.

#### To use Flags:

- Click Flags on the left sidebar
- Enter your question into the space provided and click Add Flag
- Your Attorney will be notified of your question
- Once your attorney responds to your flag, you will receive an email alert

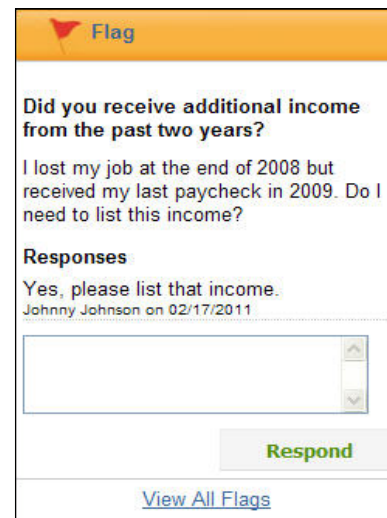
#### To read your attorney's reply:

- Log into MyCaseInfo and go to the flag
- If you have more questions, simply send another response
- To view all your flags, click View All Flags in the Flag window on any question. A window will open up displaying all of your flagged questions along with any responses from you and your attorney

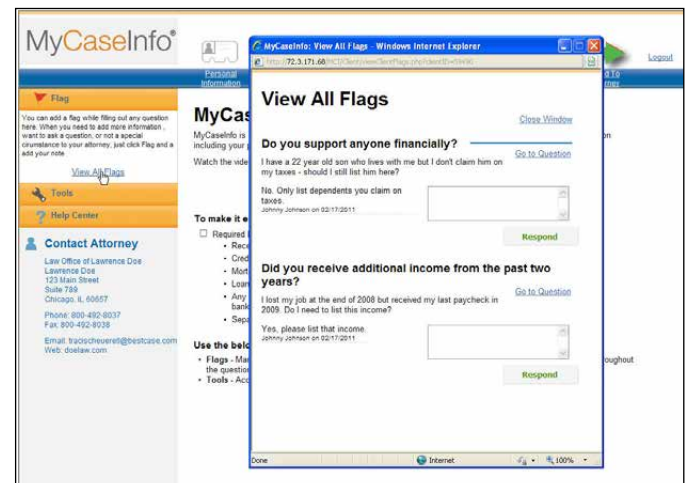
**\* TIP:** Easily get to a particular flagged question by clicking *Go to Question* to the right of the question you want to navigate to.



**Top Tabs:** Color-coded for simple navigation, the tabs tell you in a glance where you are in the questionnaire and which sections you have completed. Just click a tab to go from one section to another.



**Responses to Flagged Questions:** When your attorney replies to your question, you will receive an email alerting you that the question was answered. To read the response, just go to the flag.



**View All Flags:** Get a complete overview of your flagged correspondence with View All Flags. To go directly to a question within the questionnaire, click *Go to Question* to the right of the question in the View All Flags window.

■ **Tools**

A calculator and calendar are included for your convenience. You don't have to click out of your questionnaire to reference a date or do a simple calculation.

- Click on Tools on the left sidebar to expand the section
- Click Calendar to show and use the calendar
- Click Calculator to show and use the calculator

✳ **TIP:** You can have the calendar and the calculator open at the same time.



**Convenient Built-in Tools:** A calendar and calculator are built in to MyCaseInfo so you can complete the questionnaire as quickly as possible with less interruption.

■ **Help Center**

The MyCaseInfo Help Center is always available and provides immediate access to valuable user information instructions to help you complete your MyCaseInfo online bankruptcy questionnaire.

Simply click Help Center on the left sidebar to expand the Help Center contents.

- **Quick Start Guide**  
Review the basics of initially logging into MyCaseInfo, confirming registration and accessing the Help Center
- **Bankruptcy Glossary**  
Terms and definitions related to bankruptcy cases. Throughout the questionnaire you will see words underlined. Mouse over the word to see the definition of the bankruptcy term.
- **User's Guide**  
Get in depth, detailed instructions on each section of the questionnaire
- **FAQ's**  
Displays a list of questions with answers that are readily available
- **Getting Started Web Tutorial**  
A short video gives you instructions on how to complete the questionnaire and send it to your attorney  
NOTE: The web videos are guided instructional videos on different aspects of MyCaseInfo. The web videos are available 24/7 for your viewing
- **Complete Questionnaire Tutorial**  
This video guides you through navigating, completing the questionnaire, reviewing your information entered and submitting to your attorney
- **Full List of Questions**  
View a complete list of questions in MyCaseInfo



**MyCaseInfo Help Center:** A full complement of clear, helpful information is available and easily accessible to answer any user questions.



Get bankruptcy definitions directly in the questionnaire.


## III. THE QUESTIONNAIRE

MyCaseInfo has been designed to guide you step-by-step through entering required bankruptcy information to send to your attorney.

### Begin a Section

When you start a section, you will see a description of the section detailing the information that will be gathered as well as specifying what documents you need handy to help you complete the section.

View Instructions will give you examples and additional information. (See the individual sections of the questionnaire on pgs. 8-17.)

 **TIP:** Have a printout of View Instructions for each section while completing the questionnaire; they will come in handy and can serve as a checklist.

### Answer Questions & Input Information

You will be guided through yes and no questions to easily enter information that only applies to you.

- Click Get Started to begin this section
- Once you have completed filling out the information for a question, click Save
- If you want to go back to the previous screen, click Cancel

### Questionnaire Hints From Your Attorney


Your attorney may add additional information to assist you in completing the questionnaire. Hints can appear on the question screen or on the information entry screen in the Note From Your Attorney box as shown right.

### Incomplete Questions

As you complete questions, you may have some that apply to you but you don't have all of the required information.

1. Enter all information that you have at this time.
2. Check the **Save this information for now and return to it later** box and click **Save**.

You can come back to this question at any time to complete it.

 **Note** You will be required to finish all incomplete questions before you can send the questionnaire to your attorney.



**Section Entry Screen:** Each time you start a section of the questionnaire, you will see a screen similar to this. It tells you what information will be collected, and what paperwork you will need to complete the section.

**Information Entry:** You can accept data you enter by clicking Save, or can change it by clicking Cancel. You can also revise entries you saved earlier by editing your questionnaire.

**Incomplete Questions:** Save questions with the information you have and come back to them later.

## Review the Section

Once you have reached the end of the section, you will be able to review, edit, delete or add another record for each question before moving on to the next section.

### ■ Edit a record

Edit any record at anytime to add or correct information that was previously entered.

- Click Edit next to the record you want to update
- Update any information desired then click Save

### ■ Delete a record

Remove a record that you don't want listed

- Click Delete next to the record you want to remove
- NOTE: Some questions cannot be deleted including Name & Address and Utility Expenses

✱ **TIP:** To get back to the Summary of a section, simply click on that section's tab.

### ■ Add a Record

Add allows you to enter additional records at any time, such as adding a second car that wasn't originally entered.

- Click Add for the question desired
- Enter information and click Save

### ■ Complete a Section

After reviewing your answers, click Done to move onto the next section. Since you completed the section, the tab will turn gray.

✱ **TIP:** You can also click the tab of the section you want to work on next.

### ■ Resume a Section

If you left off in the middle of a section and are ready to return to it, click the tab of the section you're returning to and click the Resume button.

### ■ Save and Finish the Questionnaire Later

Should you need to log out of MyCaseInfo and finish your questionnaire at a later time, simply click Save and Finish Later in the upper right hand corner of the page to be securely logged out.

When you log back into MyCaseInfo, you will see a similar screen as on the right with your current progress. Click Resume to start where you left off.

✱ **TIP:** View your progress at anytime by clicking MyCaseInfo in the upper left hand corner.

### Personal Information

In the Personal Information section you will be guided through questions about your basic information, such as name (current and previous), address (current and previous), contact information, spouse (current and previous) and dependents. Questions that you answer in the Name & Address question will determine the questions you are asked throughout the remaining questionnaire. It is important to complete the Personal Information section before continuing through the questionnaire.

[View Instructions](#)
[Done](#)

#### Summary

Please make sure all information below is complete and correct then select 'Done' above.

#### Name & Address

[Edit](#)

Full Name	Sallie Johnson
Marital Status	Married
Address	876 Washington Circle
City, ST ZIP	Chicago, IL 60606
Length of Time at Address	0-5
Home Phone	312-555-5555
Best Contact Email	Email

[Back To Top](#)

**Summary:** A section Summary page gives a concise overview and is easy to get to by clicking on a section's tab.

MyCaseInfo®

Personal Information
Income
Property
Debts
Expenses
Miscellaneous
Documents
SPRING attorney

[Ask Attorney](#)

[Tech](#)

[Help Center](#)

**Contact Attorney**

Lawrence Doe  
 Best Case Bankruptcy  
 800 Duane St  
 Suite 100  
 Chicago, IL 60610  
 Phone: 800-492-8027  
 Fax: 847-123-4567  
 Email: info@bestcase.com  
 Web: http://www.bestcase.com

VeriSign

### Welcome Back to MyCaseInfo

Your last viewed question: Have you paid anyone within the last year to give you advice on handling your debts or to help you file a bankruptcy?

[Resume](#)
[Review Answers](#)

#### Progress

Track your questionnaire progress below.

	Personal Information	✓	Status: Completed	
	Income	□	Status: Not Started	<a href="#">Get Started</a>
	Property	□	Status: Not Started	<a href="#">Get Started</a>
	Debts	□	Status: Not Started	<a href="#">Get Started</a>
	Expenses	□	Status: Not Started	<a href="#">Get Started</a>
	Miscellaneous	□	Status: In Progress	<a href="#">Resume</a>

**Progress Check:** Upon logging back into MyCaseInfo you will see your current progress.



## PERSONAL INFORMATION

This section guides you through questions about your basic information, such as name (current and previous), address (current and previous), contact information, spouse (current and previous) and dependents. It is important to complete the Personal Information section before continuing through the questionnaire.

### Step 1: Gather the following documents

- All prior names and addresses used within the last eight years.
- Dependent information for you and your spouse.

### Step 2: Enter Data

#### Name and Address

Fill this section out completely before moving ahead to other sections of the questionnaire as the information entered here determines what other questions you complete.

#### Martial Status

- If you select common law or married, you will be asked if your spouse is filing bankruptcy with you and to enter information about your spouse.
- If you select Separated, Divorced, or Single, you will continue to answer questions only about yourself.

#### Other Names, Prior Addresses, Former Spouses

The questions will deal with any names you have used in the last eight years, prior home addresses in the last three years, and if you have previous spouses.

#### Dependents

If you answer yes to supporting someone financially then you will come to the Dependent screen:

- If the dependent is under the age of 18 then skip entering the name but do enter the relationship and any additional comments.
- Complete this screen for each person you support financially.

### Personal Information

Question 7 of 7 in Personal Information

**Do you support anyone financially?**

Enter each record separately. After clicking save, you will have the opportunity to add additional items.

**\* Required Fields**

What is their name?

Note: Do NOT include a name for any dependents under the age of 18

\* How old is this person?

\* Brief description of your relationship to dependent

Ex: son, grandfather, etc.

Comments

500 Character Limit

Save this information for now and return to it later

**Dependents:** Answer specific questions about each person you support financially.

### Step 3: Review your Answers

Edit or add any additional personal information. Congratulations! You have now completed the Personal Information section. Click Done, to continue.





## INCOME

This section guides you through questions about your various forms of income. Types of income include employment, retirement, business, real estate, alimony, child support, interest, dividends and the different Government assistance programs. You will need to list all income you have received in the last two calendar years and the year-to-date total for the current year.

### Step 1: Gather the following documents

\* *If married, gather income information about your spouse, even if you plan to file alone.*

- Pay stubs or a payroll printout for all income received in the last six months.
- Tax returns from the last two years, including:
- Unemployment benefit documentation (stubs) from the last six months.
- Workman's compensation documentation or personal injury claims.
- If self-employed: Business income received in the last six months.

### Step 2: Enter Data

#### Basic Employment

Each job that you have should have its own record and set of information.

- Use pay stubs to enter wages, taxes and deductions quickly, easily and accurately.

#### Types of Income

- Income related to retirement, including:
  - Pension payments
  - IRA distributions
  - 401k distributions
  - Other retirement plan payments
- Income you receive from real estate or properties or any businesses you own.
- Income related to alimony or child support.
- Income received from Government Assistance Programs including unemployment compensation, worker's compensation, U.S. Welfare System and the Supplemental Nutrition Assistance Program (the Food Stamp program).

#### Income from the Past Two Calendar Years

Include all jobs you received income on within the last two calendar years even if you no longer have the job.

### Income

Question 1 of 13 in Income

**Are you employed?**

Great, now let's enter some information about your employer. Use information from your most recent paycheck to complete the form below!

*Enter each record separately. After clicking save, you will have the opportunity to add additional items.*

\* Required Fields

\* Name of Your Employer

\* Employer Address

Address 2

\* City

\* State

\* ZIP

Ex: 80440-5549

\* Occupation Or Job Title

\* How long have you been employed?  Years  Months

\* How often do you get paid by this employer?

\* Do you expect any changes to happen with this job in the next year? For example: Less hours, more hours, or seasonal job only  Yes  No

\* How much have you made from this job so far in 2012?

Ex: 1075.75

How much did you make in 2011?


Ex: 1075.75

How much did you make in 2010?

**Basic Employment:** Enter information about each job you hold.

### Pay Stubs

You will need to provide your attorney with your pay information for the last six months.

 **TIP:** Start with your most recent pay stub and work backwards to have MyCaseInfo fill in the dates for you.

- Start at the top of your pay stub by listing the date of the check followed by your earnings.
- Next, you'll list all the various deductions that come out of your paycheck, including pre- and post-tax deductions.
- Once you've listed all your earnings and deductions, double-check that the total matches your pay stub. Missed something? Just go back and edit or add it.
- If your pay stubs for the last six months are the same, just check the 'Check this box if your paycheck is exactly the same every check'.
- Different paychecks each week? Click 'Add Another Paycheck' and another pay stub will appear for you.
- After you save all of your employment information and pay stubs by clicking 'Ok', you will be asked to review and confirm the checks you've entered.

### Upload Pay Stubs

You will be able to upload your pay stubs. See page 19 for more information.

#### Income

Question 1 of 13 in Income

**Are you employed?**

Great, now let's enter some information about your employer. Use information from your most recent paycheck to complete the form below!  
Enter each record separately. After clicking save, you will have the opportunity to add additional items.

\* Required Fields

\* Name of Your Employer

\* Employer Address

Address 2

\* City

\* State

\* ZIP   
Ex: 00040-0000

\* Occupation Or Job Title

\* How long have you been employed?  Years  Months

\* How often do you get paid by this employer?

\* Do you expect any changes to happen with this job in the next year? For example: Less hours, more hours, or seasonal job only  Yes  No

\* How much have you made from this job so far in 2012?   
Ex: 1079.79

How much did you make in 2011?   
Ex: 1079.79

How much did you make in 2010?

By law, your attorney will need six months of income information about this job. The below fields relate to your paychecks. Begin with your most recent paycheck and enter the information below.

Please use the most recent paystub you received from this employer to fill out the information below

Check #1 Total: 0.00 | [Hide](#) | [Delete](#)

\* Date Issued  /  /

Regular Salary   
Ex: 1079.79

Overtime   
Ex: 1079.79

Description	Amount	Have other income like a bonus or reimbursement? Itemize it using the fields to the left!
<input type="text"/>	<input type="text"/>	
<small>Ex: 1079.79</small>		

[Add Another](#)

Deductions		Other Deductions	
Federal Tax	<input type="text"/>	Pre Tax	<input type="text"/>
<small>Ex: 1079.79</small>		Description	Amount
State Tax	<input type="text"/>	<input type="text"/>	<input type="text"/>
<small>Ex: 1079.79</small>		<small>Ex: 1079.79</small>	
Social Security(FICA)	<input type="text"/>	<a href="#">Add Another</a>	
<small>Ex: 1079.79</small>		Post Tax	<input type="text"/>
Medicare	<input type="text"/>	Description	Amount
<small>Ex: 1079.79</small>		<input type="text"/>	<input type="text"/>
Other Local Tax	<input type="text"/>	<small>Ex: 1079.79</small>	
<small>Ex: 1079.79</small>		<a href="#">Add Another</a>	
Health Insurance	<input type="text"/>		
<small>Ex: 1079.79</small>			
Union Dues	<input type="text"/>		
<small>Ex: 1079.79</small>			
Total Income: 0.00			
Total Deductions: 0.00			
Check Amount: 0.00			

Check this box if your paycheck is exactly same every check

We need to collect information about every paycheck you've received from this employer since 11/01/2011

Click Add Another Paycheck to enter another paycheck. Once you've entered all your paychecks since 11/01/2011 click Save to continue.

[Add Another Paycheck](#)

Save this information for now and return to it later

[Save](#) [Cancel](#)

MyCaseInfo User's Guide

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### Step 3: Review your Answers

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Edit or add any additional personal information. Congratulations! You have now completed the Income section. Click Done, to continue.



## PROPERTY

This section guides you through questions about the different types of property that you own. Types of property include house or undeveloped land, vehicles, furniture and household appliances, financial accounts (checking, savings, stocks, bonds), taxes, retirement plans and insurance policies. You will also list properties that were sold, transferred, repossessed, foreclosed, seized or that you are holding for another person.

---

### Step 1: Gather the following documents

---

- Recent statements for all real estate showing balance owed on mortgage or other real estate loan.
- Recent documents showing the balance owed on any vehicle loans.
- Information regarding the sale of any real estate in the past ten years.
- Settlement statement showing sale price and amount you received.

---

### Step 2: Enter Data

---

#### Real Estate

List any real estate you own including:

- Homes, condos or town houses
- Rental Property
  - Property that you own but rent out to another person or company
- Burial Plots
- Undeveloped Land
- Farm Land – with and without a residence
- Any other type of real estate not already listed

If you have a mortgage or loan on a particular piece of real estate, be sure to list it right away by stating that the property is secured by a loan or that it has a mortgage.

#### Property You Rent

This applies if you rent your home (like an apartment) or if you rent space for your business. If you paid a security deposit, don't forget to list it as well.

#### Timeshares

Complete a separate record for each timeshare that you own.

#### Vehicles

List any vehicles you own including:

- Cars or Trucks
- Motorcycles
- Jet Skis
- Snowmobiles
- ARV's
- RV's
- Trailers
- Boats
- Aircraft


If you owe money on the vehicle simply click 'Yes' that the property is secured by a loan and you will be able to enter information regarding that loan.

## Common Property

When entering common property, do not list out each individual item that you own but simply give a grand total per category.

Your attorney may request that you list each item separately instead of combining by type. To add additional items at the bottom of the screen:

- Select the category from the dropdown list
- Enter property description, value and location
- Click Add Another to continue adding additional items

 **TIP:** *If the property is at your home address, simply check the 'This is located at my home address' box and it will auto-fill for you!*

## Financial accounts

List all financial accounts including:

- Checking and Savings Accounts
- Safe Deposit Boxes
- Mutual Funds
- Stocks
- Bonds
- Investment Accounts
  - Open, Closed and Transferred
- Annuities
- Educational IRAs and 529s
- CDs
- Money Markets
- Closed Accounts
- IRAs
- 401ks or Other Employment Sponsored Retirement Plans

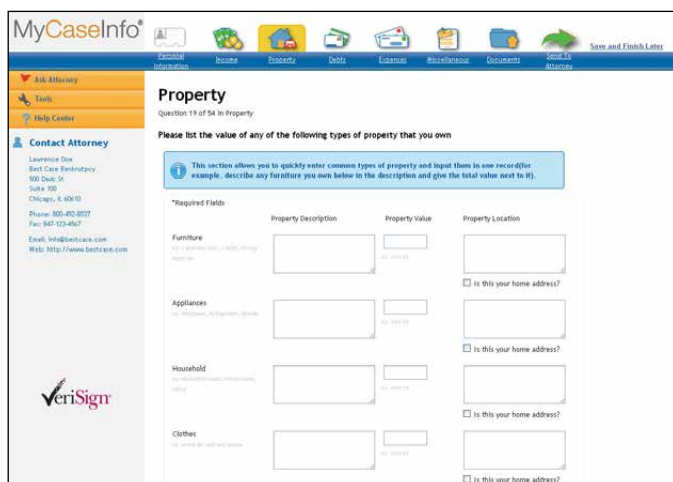
## Insurance Plans

List any insurance plans that you have including Life Insurance.

## Taxes

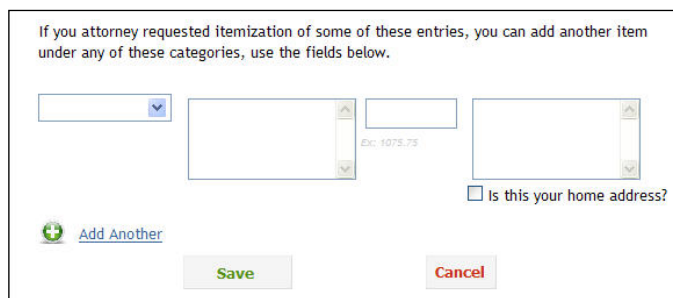
List tax information including:

- Tax refunds you have or expect to received
- Anyone who is entitled to part or all of your refund
- State or Federal taxes owed
  - Please list State and Federal separately.
- County, district or city taxes owed
  - Please list owed taxes separately.
- Tax Lien
  - Taxes owed resulted in a lien being placed on a piece of your property for Property, Income or IRS taxes.
- Upload documents -- You will be able to upload your tax records. See page 19 for more information.



The screenshot shows the MyCaseInfo 'Property' entry form. It includes a navigation bar with tabs for 'Case Information', 'Income', 'Property', 'Debt', 'Liabilities', 'Miscellaneous', 'Documents', and 'Skills History'. The 'Property' tab is active. The form title is 'Property' and it is 'Question 19 of 54 in Property'. A blue information box states: 'This section allows you to quickly enter common types of property and input them in one record (for example, describe any furniture you own below in the description and give the total value next to it)'. Below this is a table with columns for 'Required Fields', 'Property Description', 'Property Value', and 'Property Location'. The rows are: Furniture, Appliances, Household, and Clothes. Each row has a dropdown for description, a text box for value, and a text box for location. A checkbox labeled 'Is this your home address?' is present at the end of each row. A 'VeriSign' logo is visible in the bottom left corner.

**Common Property:** Enter the common property you own by category.



The screenshot shows the 'Add Another' form for property itemization. It contains a dropdown menu, a text box for description, a text box for value (with an example 'Ex: 1075.75'), and a text box for location. A checkbox labeled 'Is this your home address?' is located below the location field. At the bottom, there are 'Add Another', 'Save', and 'Cancel' buttons.

**Additional Common Property:** If your attorney requests your property to be itemized, list each piece by using Add Another.

### Other Government Owed Money

List money owed to the government other than taxes, including:

- Overpayment of benefits
- Withholding taxes in a business
- Small Business Administration

### Inheritances and Trusts

Inheritances and trusts that you have or might receive.

### Intellectual Property

Intellectual property, such as copyrights or patents that you own. Complete a record for each copyright and patent you have.

### Held or Borrowed Property

Property that you are holding or borrowing from another person but that you don't own.

### Property Own(ed)

Property you own(ed) that the following might have occurred:

- Transferred the property to another person or company within the last year by selling or giving it away.
  - If the property was transferred or given some claim to another person or business within the 120 days list it under 'Assignments'.
- Property that has been appointed to a disinterested third party (receiver) by a court or government agency to protect or collect assets that are subject to diverse claims.
  - Example: A receiver may be appointed by the FDIC for a failing bank or corporation.
- Property that was taken by a creditor to pay for a debt that you owe that creditor. This is also known as a setoff which is a creditor's right to reduce the amount of debt by an amount the debtor owes the creditor.
- Attached, garnished or seized property within the last year.
  - An attached property means that there is a lien against it but ownership still stays with owner.
  - A garnished property is one that the possession, ownership and control of the property is transferred to the creditor.
  - A seized property is where possession of the property is taken but ownership is still by the owner.
- Property that was foreclosed on, repossessed or returned within the last year.
  - Property that was taken to satisfy an obligation secured by the property taken.

### Other Property

Enter any property that you have that did not apply to a previously asked question.

---

## Step 3: Review your Answers

---

Edit or add any additional personal information. Congratulations! You have now completed the Property section. Click Done, to continue.



## DEBTS

This section guides you through questions about accounts that are past due or that you owe money on. Types of debts include loans, credit card bills, medical bills and legal bills. You will also be able to list any lawsuits against you, liens on your property, garnished wages and any criminal charges or convictions.

### Step 1: Gather the following documents

- Copies of all unpaid bills in the last 90 days:
  - Credit Cards
  - Student, Family or Personal Loans
  - Collection Notices
  - Attorney Letters
  - Medical Bills
- Court documents from creditors
- Copies of lawsuits or judgments

### Step 2: Enter Data

#### Credit Cards and Loans

List all credit cards and loans that are past due.

- Do not list any mortgages or loans you have on property, vehicles or recreational vehicles. This information should be listed with the property itself. See the Property section for further details.

#### Unpaid Bills

Enter unpaid bills you have related to utility, medical, dental or legal services received.

#### Legal Actions

Enter information related to any legal actions against you or pursued by you, including:

- Property Liens
  - A lien can be placed upon your property to secure a debt that you owe including a Mechanic's Lien. If you have a lien on your property because of taxes owed, please list it in the Property section, Tax Liens.
- Wage Garnishments
  - Money taken from your paycheck to pay a debt.
- Anticipated Lawsuits
  - If you have reason to sue a person, company or organization because of damage done to your property or injury to yourself or family members, list it here.
- Administrative Agency Cases
  - Any cases that you or your spouse have been involved in the past 12 months including Unemployment Compensation or Worker's Compensation

### Debts

Question 1 of 16 in Debts

**Do you have or are you authorized to use any credit cards?**

OK let's get some information about your credit cards.  
Enter each record separately. After clicking save, you will have the opportunity to add additional items.

\* Required Fields

\* Type of Card Please Select ▾

\* Who issued the card? Ex: Citibank Visa, Discover, Macy's, etc.

\* Address 1

Address 2

\* City

\* State Please Select ▾

\* ZIP   
Ex: 60940-5549

What is the account number?

When did you open this account? [month] ▾ / [day] ▾ / [year] ▾

When did you last use this card? [month] ▾ / [day] ▾ / [year] ▾

Brief description of the account and any rewards programs associated with it

\* How much do you owe?   
Ex: 1075.75

This lender and I disagree on the amount I

**Credit Cards:** List information for all credit cards and loans that are past due. Do not list mortgages or loans that you have on property.

- Criminal Charges and Convictions
  - Any felonies or misdemeanors including DUI's.

**Payments to Creditors**

List any payments that you made to creditors from the last three months that were over \$600 total. Only list a creditor if they have not already been listed.

**Debts**

Question 10 of 17 in Debts

Have you or spouse sued or been sued by any person, company, or organization within the last year?

Answer Yes if you have sued or been sued by someone



[Yes](#)



[No](#)

**Legal Actions:** Answer straight-forward questions throughout the interview with a simple Yes or No.

**Debts**

Question 16 of 17 in Debts

Have you repaid someone \$600 or more over the last three months?

OK, we need to get some information about your payments.  
Enter each record separately. After clicking save, you will have the opportunity to add additional items.

\* Required Fields

\* Who did you pay?

\* Address 1

Address 2

\* City

\* State Please Select

\* ZIP   
Ex: 65440-5549

\* When did you make payments during the last three months?   
Enter dates separated by commas. Ex: "11/12/2010, 12/31/2010"

\* How much did you pay during the last three months?   
Ex: 1079.79

\* How much do you owe to this lender or person?   
Ex: 1079.79

Comments to Attorney   
500 Character Limit

Save this information for now and return to

**Payments to Creditors:** List any payments made to creditors from the last three months that totaled over \$600 that have not already been listed.

---

**Step 3: Review your Answers**

---

Edit or add any additional personal information. Congratulations! You have now completed the Debts section. Click Done, to continue.





## EXPENSES

This section guides you through questions about your current monthly expenses. Types of monthly expenses include rent or mortgage payments, electricity, water, telephone, food, clothing, laundry, medical, transportation, insurance (medical, dental, etc.) and taxes. If you have any active leases or contracts they should also be listed in this section.

---

### Step 1: Gather the following documents

---

- Recent billing statements including:
  - Utility services
  - Property taxes
  - Home, car or student loans
  - Life, home or car insurance
  - Other recurring monthly payments

---

### Step 2: Enter Data

---

#### Monthly Expenses

List expenses that occur on a monthly basis.

- Utilities can include:
  - Rent or Home Mortgage
  - Home Maintenance
  - Electricity
  - Water/Sewer
  - Telephone
  - Cable
  - Cell Phone
  - Internet
  - Garbage Pickup
- Living expenses can include:
  - Food
  - Clothes
  - Laundry and Dry Cleaning
  - Medical Bills
  - Transportation
  - Recreation and Entertainment
  - Gym Memberships
  - Newspaper/Magazine Subscriptions
  - School Lunches
  - Children's Activities
  - Children's School Tuition
  - Child Day Care
  - Pet Care
  - Charity Donations

- Insurance expenses can include:
  - Homeowner’s or Renter’s Insurance
  - Life Insurance
  - Health Insurance
  - Auto Insurance
- Monthly taxes can include:
  - Use taxes, Gift taxes, Sales taxes

**Other**

Any expenses that you have on a monthly basis that don’t fit in one of the categories above can be listed in the ‘Other’ category.

- Simply describe what the expense is and the monthly amount.

**Other Expenses:** List any other monthly expenses that do not fit in other categories.

**Contracts or Leases**

List any contracts or leases that have not already been listed including Rent to Own Agreements and Auto leases.

**Leases or Contracts:** List any leases or contracts that have not already been entered.

**Step 3: Review your Answers**

Edit or add any additional personal information. Congratulations! You have now completed the Expense section. Click Done, to continue.



## MISCELLANEOUS

This section guides you through questions about any loss due to theft, fire or gambling and any payments you made to receive advice on handling debts or filing bankruptcy. If you have prior or related bankruptcy cases they should be listed in this section.

---

### Step 1: Gather the following documents

---

- Case information on any previous bankruptcies filed by yourself, spouse or business affiliate.

---

### Step 2: Enter Data

---

#### **Fire Theft or Gambling Loses**

List any personal belongings that were lost due to a fire, theft or gambling. Include all assets or properties that were lost in the same event in the same record.

- For example: If your house burned down and all your belongings were destroyed, you would state it in one record with one value.

#### **Criminal Charges**

Your attorney needs a complete picture of your legal and financial status in order to be an effective advocate for you, so be sure to list any crimes you've been charged or convicted of.

#### **Debt Counseling or Bankruptcy Advice**

Debt counseling or bankruptcy advice that you received for a fee should be listed. Each source or company should be listed in its own record.

#### **Upload Documents**

You will be able to upload your certificates. See page 20 for more information.

#### **Other Bankruptcy Cases**

List prior bankruptcy cases that you were directly involved in or that your spouse or business affiliate were involved in.

---

### Step 3: Review your Answers

---

Edit or add any additional personal information. Congratulations! You have now completed the Miscellaneous section. Click Done, to continue.



## DOCUMENTS

This section guides you through uploading necessary documents for your filing.

---

### Step 1: Gather the following documents

---

- Paychecks
- Tax returns
- Credit counseling certificates

---

### Step 2: Upload Data

---

- Upload your documents by clicking “Add Files...” and selecting them
- All files must be smaller than 20 MB
- Accepted formats: PDF, PNG, JPG, GIF, DOC

---

### Step 3: Review your Answers

---

When you have uploaded and reviewed all of the requested files you can, click [Done](#) to review and submit the questionnaire.

## IV. SEND THE QUESTIONNAIRE TO YOUR ATTORNEY

Once you have completed and reviewed your questionnaire, you must send it to your attorney.

- Carefully review your questionnaire for any unanswered questions and for accuracy
- Easily change your view of the questionnaire summary.
  - Hide Empty/Unanswered Questions - Only see the questions and information you answered yes to.
  - Show ALL Questions - View all questions regardless of how you answered them.
  - Show Only Questions Needing Attention - Only see the questions that require your attention before sending the questionnaire to your attorney.
- If you find any information that is incorrect or if you need to update the questionnaire, you can edit, delete or add another record right from this screen
- When you are satisfied with the information entered, check the I(We) the debtor's agree checkbox then click the Submit button to send it to your attorney
- Once your questionnaire is submitted, you are logged out of MyCaseInfo and your account is locked



*If you have any incomplete questions, you will be required to finish them before sending the questionnaire to your attorney. See page 6 with more info.*

**Summary Screen:** Before you submit your questionnaire, this Summary Screen provides a quick overview of the information you entered and is helpful for checking your work .

**Send to Attorney:** In order to submit your questionnaire, you will be asked to agree to release the data to your attorney, and that the information you provided is complete and accurate. After you indicate agreement, click Send to Attorney.

## V. RESUBMITTED QUESTIONNAIRE BY YOUR ATTORNEY

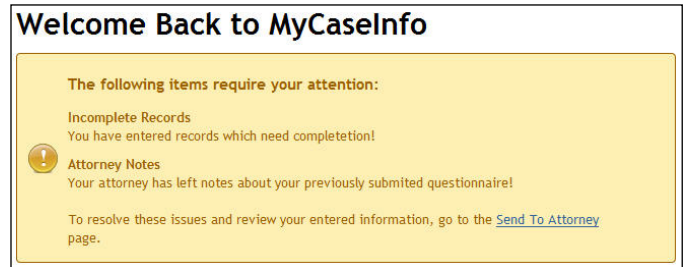
While reviewing your questionnaire, your attorney might find some areas where the information is missing, incorrect or incomplete. In these cases, the attorney will send your questionnaire back to you for more information.

- You will receive an email with specific instructions on which sections of the questionnaire you need to complete or adjust.
- Your MyCaseInfo account is automatically unlocked when your attorney resubmits your questionnaire back to you.
- Needs Review Notes
  - Your attorney might have made notes to your account that need your attention. When you log back into MyCaseInfo you will see a message that there are notes for review.
  - Click Review to access your attorney's notes and make adjustments to your questionnaire.

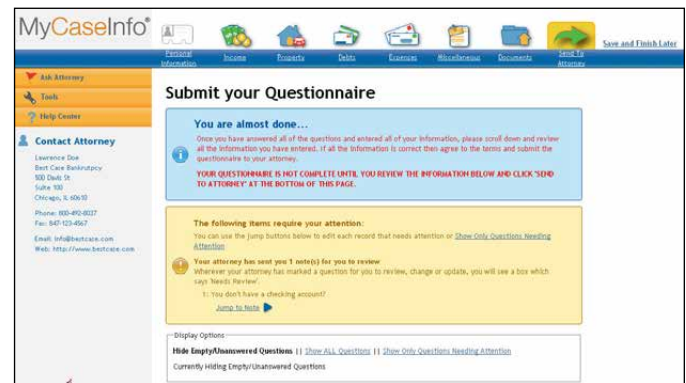
**\* TIP:** Quickly go to a specific note by clicking Jump to Note of the desired question.

- Send a response back to your attorney directly from the Needs Review Note.
- Once you have completed reviewing your questionnaire, send the it back to your attorney for futher review.

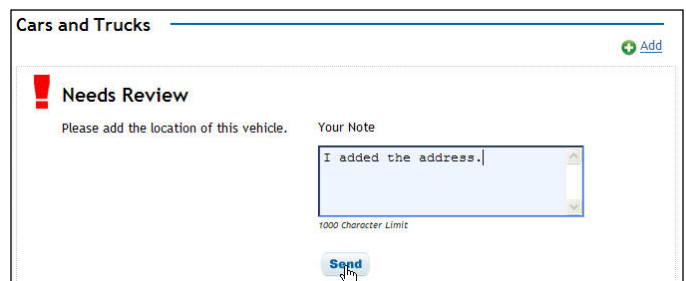
- As your attorney reviews the information and responses of their notes, they may mark the question as complete once finished as shown right.



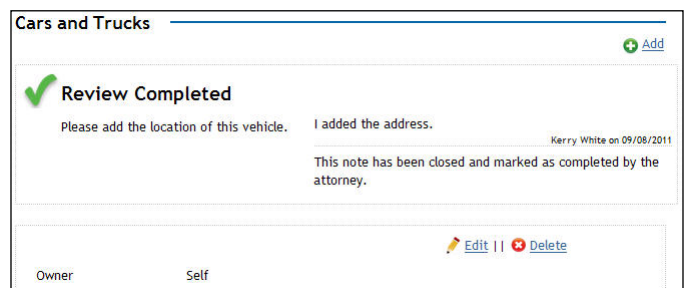
**Review Notice:** If your attorney has made notes for you to review, you will see a message when you log back into MyCaseInfo.



**Summary Review:** The Review page will show you exactly how many notes your attorney has made and an easy way to get to a particular note.



**Needs Review Notes:** See the note your attorney made about a question and easily respond.



**Completed Review Note:** Once a review note has been completed, you attorney might mark it as such to easily identify that this question needs no further review