

JUBILEE

CASE ISSUES

CHEAT SHEET



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What are Case Issues and where can I find them?

When trying to file a case, you may come across a list of case issues. Certain information may not be allowed to be left out. In this case, Jubilee will not allow you to continue with the filing process. Below is a cheat sheet list of case issues and how to address them. The red  means that you cannot continue to file the case until these issues are resolved. The orange  means that you can continue to file the case without this information if you choose to do so.

-  **(Debtor's name): Address is missing:** When in the case, click on the **ASSOCIATED PARTIES** tab in the blue left-hand side panel. Click on the debtor whose address is missing. In the new dialogue window, on the Contact Information tab, in the Address section, click on the blue **UPDATE** button. A new dialogue window will open. Fill out the following information and hit **Save & Close**.
-  **(Debtor's name): Address is missing county:** Inside a case, click on **PETITION** in the blue left-hand side panel. In the drop-down menu, click on **GENERAL INFORMATION**. Click on the **Debtors** tab and then on the name of the debtor whose address is missing. In the new dialogue window, under the Contact Information tab, there is a section labeled Address. Click on the blue **UPDATE** button and add the county to the address then hit **Save & Close**.
-  **Creditors: No creditors have been entered:** To add creditors, click on the **PETITION** button in the blue left-hand side panel inside a case. In the drop-down menu, click on **CREDITORS**. Choose the tab that represents what type of creditor it is (i.e. Secured Creditors, Priority Creditors, Unsecured Creditors) and hit the **+NEW** button. In the new dialogue window, fill out the desired information and chose a saving option.
-  **Files: Nothing is selected for filing:** This means that you have not selected anything to file. Inside a case, click on the blue **ELECTRONIC FILING** button on the left-hand side. Under the ECF Documents tab, check the **ECF Events** that you want to include in filing the case. Once they have been selected, click the blue **Continue to Filing Summary** button at the bottom right of the page.
-  **Filing Fee: Not completed:** Inside a case, click on **PETITION** in the blue left-hand side panel. In the drop-down menu, click on **GENERAL INFORMATION**. On this page, click on the **Fees** tab and then the **Filing Fees** sub-tab. Fill out the filing fees information and then hit the **Save** button in the bottom right.
-  **Filing attorney has not been selected:** To add a filing attorney, inside a case, click on **ASSOCIATED PARTIES** to the blue left-hand side panel. Under the Parties tab, in the Attorneys section, click on the blue **+ADD** button. Fill out the required information and hit the blue **Save** button.
-  **Filing Fee: Installment payments are not eligible for e-filing in CASB:** If your case is being filed in the Southern District of California you will see this error if you have set your fees to be paid in installments. To change this, click on **PETITION** in the blue left-hand side panel. In the drop-down menu, click on **GENERAL INFORMATION**. On this page, click on the **Fees** tab and then the **Filing Fees** sub-tab. Change your filing fees to attached or waiver requested.

- ⚠ Firm address is missing:** To add your firm address, click on the **Profile Menu** in the top right corner. In the drop-down menu, click on **Firm & System Settings** and then on the **Offices** tab. Click on your office and in the new dialogue window, on the Contact Information tab, in the Address section, click on the blue **UPDATE** button. A new dialogue window will open. Fill out the following information and hit **Save & Close**.
- ⚠ Forms date is not checked:** Inside a case, click on the **CASE FORMS** button in the blue left-hand side panel. At the bottom of this page, in the grey section, check the **Include Date** box so the date will be added on the forms.
- ⚠ Forms electronic signature is not checked:** Inside a case, click on the **CASE FORMS** button in the blue left-hand side panel. At the bottom of this page, in the grey section, click the check box next to **Include E-Signature** to include it on the forms.
- ⚠ Forms watermark is set to Draft/Client Copy/Copy/Filed:** Inside a case, click on the **CASE FORMS** button in the blue left-hand side panel. At the bottom of this page, in the grey section, click on the box to the right of the section called Watermark and click on **None**.
- ⚠ (Person's Name): Missing social security/tax ID.:** When in the case, click on the **ASSOCIATED PARTIES** tab in the blue left-hand side panel. Click on the person whose social security/tax ID is missing. In the new dialogue window, click on the **Details** tab, and hit the sub-tab labeled **Social Security Numbers**. Click on the blue **+ADD** button next to Tax Payer IDs. A new dialogue window will open where you can fill out the following information. When you are done, click the blue **Save** button at the bottom of the dialogue window.
- ⚠ (ECF Event): Selected but file is empty:** This will appear if you have included an ECF event that does not contain a document. Inside a case, click on the blue **ELECTRONIC FILING** button on the left-hand side. Under the ECF Documents tab, hover over the ECF Event that you are receiving the case issue about until it turns blue. Click the blue button labeled **MODIFY INCLUDED FORMS**. From here, you can either select the document you need underneath the section labeled Forms and Documents available to be added and hit the single arrow pointing to the right, or you can upload a document. To upload a document, click on the blue **Upload Document** button located at the bottom left of the page. Click the **Add Files...** button in the new dialogue window. Choose the document you want to upload and then hit the blue **Upload & Close** button. The file will automatically be added to the Included Forms & Documents section.
- ⚠ Assets: No assets have been entered:** To add assets to a case, click on the blue **PETITION** button located in the left-hand side panel. In the drop-down menu, click on **PROPERTY**. From here you can add an asset to any of the categories by clicking the **+NEW** button.
- ⚠ Creditor Matrix will NOT be filed:** If you would like to include the Creditor Matrix in the case filing, inside a case, click on the blue **ELECTRONIC FILING** button on the left-hand side. Under the ECF Documents tab, check the box next to the **Creditor Matrix** to include it when filing the case.
- ⚠ Exemption set has not been set:** Make sure that you have chosen an exemption option (State or Federal Exemptions). If you have not, inside a case, click on the blue **TOOLS** button in the left-hand side panel. In the drop-down menu, click on **EXEMPTION CALCULATOR**. Under the Summary tab, check the box for either State Exemptions or Federal Exemptions.
- ⚠ Means Test: Allowances are not latest:** Jubilee will automatically use the Means Test numbers effective as of the date of filing, but in some situations the Means Test numbers may need to be updated in the case. Inside the case, click the blue **MEANS TEST** button in the left-hand side panel. On the Details tab, at the bottom of the page, hit the blue **VIEW ALLOWANCES** button. In the new dialogue window, click the blue **UPDATE TO LATEST AND RECALCULATE ALLOWANCES** button.

 **Means Test: Projected filing date will cause forms to print incorrectly:** If a projected filing date was entered that causes the six-month Means Test “look back period” to be inaccurate, then you will receive this warning. To change the projected filing date, click on **PETITION** in the blue left-hand side panel. In the drop-down menu, click on **GENERAL INFORMATION**. Under the Details tab, there will be a section called Projected Filing Date. You can either delete, enter today’s date or a later date into the projected filing date section. This will readjust the six-month income period to the entered date.

Note: Don’t forget to verify your means test income information.

 **Means Test Data will not be sent:** This case issue means that this information will not be sent to CM/ECF during the filing process. If you would like to include this, you can do so by clicking on the blue **ELECTRONIC FILING** button in the left-hand side panel. Clicking on the **Settings** tab, located to the right of the page, there is a section at the bottom labeled Exclude the following data from being sent to CM/ECF. Uncheck the box for **Means Test Data** and the information will be sent during the filing process.

 **Schedule I & J Data will not be sent:** This case issue means that this information will not be sent to CM/ECF during the filing process. If you would like to include this, you can do so by clicking on the blue **ELECTRONIC FILING** button in the left-hand side panel. Clicking on the **Settings** tab, located to the right of the page, there is a section at the bottom labeled Exclude the following data from being sent to CM/ECF. Uncheck the box for **Schedule I & J Data** and the information will be sent during the filing process.

 **Some creditors are missing an address:** Instead of going through all your creditors to find which one is missing an address, the easiest way to solve this problem is by clicking on **CASE FORMS** in the blue left-hand side panel. Under the Official Forms tab, click the blue **View** button for the form called Creditor Matrix. This will allow you to easily see which creditor is missing an address. To change the creditor’s address, click on the **PETITION** button in the blue left-hand side panel inside a case. In the drop-down menu, click on **CREDITORS**. Click on the desired creditor then, when the creditors page opens, click on the creditors name in blue directly above the Details tab. In the new dialogue window, on the Contact Information tab, in the Address section, click on the blue **UPDATE** button. A new dialogue window will open. Fill out the following information and hit **Save & Close**.

 **Summary of Schedules Data will not be sent:** This case issue means that this information will not be sent to CM/ECF during the filing process. If you would like to include this, you can do so by clicking on the blue **ELECTRONIC FILING** button in the left-hand side panel. Clicking on the **Settings** tab, located to the right of the page, there is a section at the bottom labeled Exclude the following data from being sent to CM/ECF. Uncheck the box for **Summary of Schedules Data** and the information will be sent during the filing process.

For more information about case issues, feel free to contact us. Continue scrolling down for our contact information.

CONTACT INFORMATION

LegalPRO Systems, Inc.
12042 Blanco Rd #308, San Antonio, TX 78216
(210) 561-5400
7:30-6:30 Central Time, Monday-Friday

Click on the **bold text** to go directly to each website.

Tech Support

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Schedule a call with our **Onboarding**

Specialist: <https://calendly.com/evonne-1>

Tutorial Videos:

<https://jubileebk.com/tutorial-videos>

These how-to videos are located on our Jubilee website.

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On our Forum, you can post a question or look at previous questions we have answered.

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