



SCB PLAN INSTRUCTIONS FOR JUBILEE

Modified Plan:

This check box is selected by clicking Plan Manager and checking the modified check box. After checking you will see the input field "Plan Modification Options" where you can enter the version, month modified and reason for the modification and you will be able to select pre or post confirmation.

1.1 - A limit on the amount of a secured claim:

This will be checked if creditors are listed in section 3.2 of the plan. These are secured creditors that you have decided to pay the value and not the full claim amount.

1.2 – Avoidance:

This will be checked if creditors are listed in section 3.4 of the plan. These are secured creditors that you are Avoiding the Lien, you will indicate this by going to petition, creditors selecting your creditor, selecting plan options and checking the box for Claim Exempt and Avoid Lien.

1.3 - Nonstandard provisions:

To check the box, you must have entered a Plan Provision to do so go to Plan Manager, click tab for Plan Provision and click New to add a provision.

1.4 - Conduit Mortgage Payments:

To check this box, you will need to enter a secured creditor that is secured by the Debtor's principal residence, you will need to go to Petition, Creditors, select the creditor, go to Plan options scroll to the bottom of the page and uncheck the box to auto assign and select paragraph 3.1c, you will also need to add a Nonstandard provision as explained above.

2.1 – Payments:

Payments to the trustee are entered on the details tab under the plan manager. You will also enter any step payments in this section.

2.2 – Payments Disbursement Options:

To indicate how payments will be made to the trustee you will have the check the option by going to Plan Manager and scrolling to the Payment Disbursement Options and check one of the three options.

2.3 Income Tax Refunds:

To indicate the treatment for income tax returns you will need to go to Plan Manager, Detail tab and click on Plan Options her you will be able to indicate your selection.

2.4 – Additional Payments:

To indicate an additional payment, you would need to add the payment under the additional payment tab located under Plan Manager on the detail tab click on “Additional”.

3.1 Maintenance of payments and cure or waiver of default:

3.1a – Direct Payments

This is a Secured Creditor in which the Debtor will be making payments directly, you must go to petition, creditors, secured creditors and click the Plan Option tab within the creditor, select the button that says, “Direct Pay”.

3.1(b) – Direct Payments with Arrearage:

This is a Secured Creditor in which the Debtor will be making ongoing payments directly, you must go to petition, creditors, secured creditors and click the Plan Option tab within the creditor, select the button that says, “Direct Pay”. To set how the Arrearage will be paid scroll to the top of the Plan options page and click the arrearage tab you will then be able to set how the arrearage will be handled.

3.1(c) – Regular Mortgage Payments (Paid to Trustee):

This item is selected by going to Plan Manager, Details Tab and clicking the plan options button.

3.1(d) – Loss Mitigation:

This item is selected by going to Plan Manager, Details Tab and clicking the plan options button.

3.1(e) – Other

This item is selected by going to Plan Manager, Details Tab and clicking the plan options button.

3.2 – Request for Valuation:

This creditor will be secured and have an asset attached, you will also be paying the value of the asset within the term of the plan and have check the button to pay asset value on the plan tab within the creditor selected.

3.3 – Other Secured Claims:

This creditor will be secured and have an asset attached, you will also be paying the claim and not the value of the asset within the term of the plan.

3.4 – Lien Avoidance:

This creditor will be secured and have an asset attached, you will also be paying the value of the asset within the term of the plan and have check the button to pay asset value and the avoid claim box on the Plan Options tab within the creditor the amount to be avoided will be the difference of the claim and value of properties attached.

3.5 – Surrender of Collateral:

The creditor in this section must be secured and have selected the surrender option on the plan options tab within the creditor.

4.1 – General:

This information is provided by the Court and can not be changed in the program.

4.2 – Trustee fees:

This information is provided by the Court and cannot be changed in the program.

4.3 – Attorney fees:

- a.) This selection is for Flat fees, go to Petition, General Information and click on the fees tab select Flat Fee from the drop-down menu.
- b.) This selection is for Fee Applications, you will need to go to Time and Billing to Create a time activity, the you will go to General Information, fees tab and select the Hourly (set for Matters) selection from the drop down menu, here you can add additional expenses and the amount received.

4.4 – Priority Claims (DSO):

These will be Priority Creditors and the priority type will be Domestic Support Obligations (If no arrearage we will just check the box for Domestic Support Claim and sections b and c will apply, when an arrearage is entered we will enter DSO name and monthly amount to be paid by the trustee in paragraph a and also print b and c on the form.

4.4 – Priority Claims (DSO Assigned to Governmental Unit):

These will be Priority Creditors and the priority type will be Domestic Support Obligations, you must also, check the box on the details tab for the creditor that says “Is Governmental”.

5.1 – Nonpriority unsecured claims:

Box 1 – This box is selected if the plan is paying less than 100% to the unsecured creditors in the case.

Box 2 - This box is selected if the plan is paying 100% to the unsecured creditors in the case.

Box 3 - This box is selected if the plan is paying 100% plus interest to the unsecured creditors in the case.

5.2 – Maintenance of Payments and cure of any default on nonpriority unsecured claims:

This will be a nonpriority unsecured creditor that is owed an arrearage, you can set the arrearage payment on the arrearage tab within the creditor, click plan options and Arrearage.

5.3 - Other separately classified nonpriority unsecured claims:

The creditor that is displayed here is a special class unsecured creditor, you must go to the plan options tab within the unsecured creditor and select the box that says, “Specially Classify Unsecured Claim”. If you would like it to be a long-term debt, uncheck that box that says, “Last payment made within the plan length”, you will also be able to enter the basis for the separate classification on this tab.

6.1 – Executory Contracts:

This is an Assumed Executory Contract, you must go to petition, executory contracts, Plan Option tab within the creditor.

7.1 – Executory Contracts:

You can make this selection by going to Plan Manager and clicking the Plan Options button.

8.1 – Nonstandard Plan Provisions:

This is entered as a Plan Provision, to do so go to Plan Manager, click tab for Plan Provision and click New to add a provision.