



GASB PLAN INSTRUCTION FOR JUBILEE

***** This form is a fillable form in Jubilee. Some of the data will be pre-populated from the case (debtor name, date, case number, etc.) and other data will need to be entered directly on the form. To access the Plan form you will go to Plan Manager – View Plan button. Once you enter data directly on the form you will need to save the data by clicking Save at the bottom (Be advised that any data save directly on the form will remain on the form regardless of the data being changed in the program, nor will changes made directly on the form update the program data. To erase the data saved on the fillable form you can click the reset button at the top (This will reset the entire form and populate fields with data from the program any data that needs to be entered on the form will need to be reentered. *****

Amended Plan:

This Check box is selected by clicking Plan Manager and checking the Amended check box after checking you will see the input field “Amended Plan Options” where you can enter the amended date, version and reason amending.

1. Notices:

- (a) **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.
- (b) **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.
- (c) **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.

2. Plan Payments:

- (a) Payments to the trustee are entered on the details tab under the plan manager, titled “Regular Monthly Plan Payments”. The applicable commitment will automatically be checked based on the Means Test, if debtor is above median it will check 60 months, if below then it will check the 36 months. If the payments change during the life of the Bankruptcy, you will need to indicate the change month under regular payments and Jubilee will fill in the information.

- (b) If the Debtor(s) will be paying by wage order you will need to select “Pay Order (Employer)” on the Details tab under Plan Manager, you will also, have to enter the Pay Order information by going to the Pay Order tab under plan manger, this information can also be changed when viewing the plan, however, any changes while viewing the plan will not override the case data, it will only be changed on the printed form. If Direct to Trustee is selected you will need to select Debtor(Direct) on the Details tab on the Plan Manager, you will also need to indicate the reason that the Debtor is paying directly by using the filable option you will need to click view plan on the Details Tab of the Plan Manager here you will be able to select your choice and save it to your plan.
- (c) 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. Long-Term Debt Payments:

- (a) This is the secured creditor, you must go to petition, creditors, Plan Option tab within the creditor and uncheck the box “Last payment made within plan length”.
- (b) This is the secured creditor as indicated above and you have entered an amount for arrearage, to add interest rate you will go to the creditor, click the plan option button within the creditor and click the sub tab for Arrears.

4. Treatment of Claims:

(a) Trustee’s Fee:

This information is written by the court and cannot be edited in the program.

(b) Attorney’s Fees:

This information is set by going to Petition, General Information and clicking the fees tab, you are also able to edit this information when previewing the plan form. (Please note if you update this information when previewing this will not update the data in the program).

(c) Priority Claims:

This information is written by the court and cannot be edited in the program.

(d) Fully Secured Allowed Claims:

This is a secured creditor that Debtor(s) will be paying the claim in full and it does not fall under the 910 rule.

(e) Secured Claims Excluded from 11 U.S.C. § 506 (those claims subject to the hanging paragraph of 11 U.S.C. § 1325(a)):

This is a secured creditor and the claims listed below were either: (1) incurred within 910 days before the petition date and secured by a purchase money security interest in a motor vehicle acquired for the personal use of the Debtor(s), or (2) incurred within 1 year of the petition date

and secured by a purchase money security interest in any other thing of value. These claims will be paid in full under the plan.

(f) Valuation of Secured Claims 11 U.S.C. § 506 is Applicable:

This is a secured claim and the Debtor(s) have chosen to pay the Value, you will go to the creditor and click the plan options tab within here you will indicate to pay value.

(g) Special Treatment of Unsecured Claims:

These creditors will be unsecured special class creditors whose claim will be paid in full, to indicate if the creditor(s) will be paid with interest and what percentage or without interest you must edit the information when previewing (see above).

(h) General Unsecured Claims:

This information is generated by the program based on the total unsecured claims and the percentage being paid to said claims. *****This information can be edited when previewing the plan (See Above).

5. Executory Contracts:

- (a) This is an Assumed or Rejected Executory Contract that will be paid by the Trustee by default to select Direct pay, you must go to petition, executory contracts, Plan Option tab within the creditor, select the button that says, "Direct Pay".
- (b) Payment of Arrears (By Trustee): This is an Assumed Executory Contract with arrearage, you will follow steps above by going to petition, executory contracts, Plan Option tab within the creditor, then you will click the arrearage tab and set this to Fixed Fee or Pro Rata.

6. Adequate Protection Payments:

This will be a secured creditor and you will check the box on the plan options tab within the creditor labeled "Pay adequate protection" and enter the amount (Manual or percentage) or select pay direct, then on the detail tab in the plan manager you will indicate Adequate Protection and select the length (until attorney fees are paid in full or until confirmation).

7. Domestic Support Obligations:

These will be Priority Creditors and the priority type will be Domestic Support Obligations.

8. 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.

9. 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.

10. This information is written by the court and cannot be edited in the program.

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15. Non-standard 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.