

JUBILEE

HOW-TO HANDBOOK



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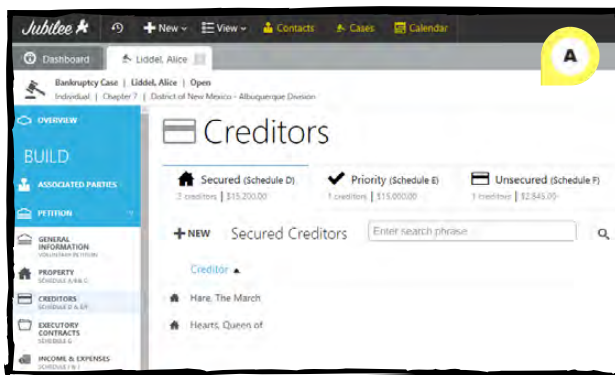
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- Creating an Account
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HOW-TO HANDBOOK

How do I use this handbook?

With software constantly evolving, it comes in handy to have instructions on how to use different aspects of Jubilee. Along with the instructions are corresponding pictures that give an overall view of what it looks like in Jubilee.

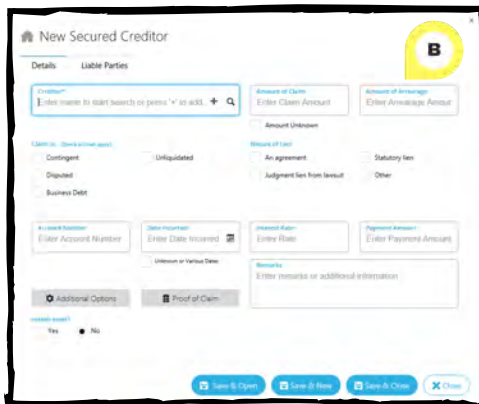


Adding Creditors:

1) To add a creditor, click on **PETITION** in the blue sidebar to the left. In the drop-down, click on **CREDITORS**, select the creditor type (i.e. Secured Creditors, Priority Creditors, Unsecured Creditors), and hit the **+NEW** button to the left of the page (see figure A).

2) In the new dialogue window, fill out the desired information.

*Note: When typing in the creditor name, Jubilee will search your list of contacts to see if the creditor has already been entered into your Contacts list. If it is a new contact, click the + button next to the search magnifying glass. Fill out the dialogue window with the desired information and hit **Save & Close**. The new person or company has now been saved in contacts and can be added as a creditor.*



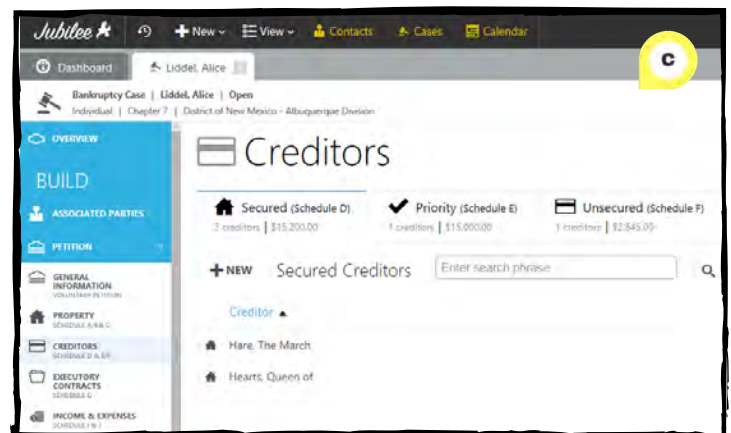
Once the creditor and any additional information has been added, you can click the **Save & Open** button to add more in-depth information, **Save & New** to add a new creditor or **Save & Close** if you have entered all desired information (see figure B).

Adding Liable Parties:

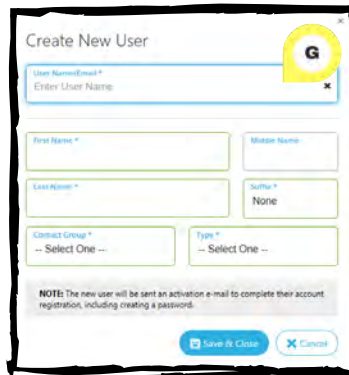
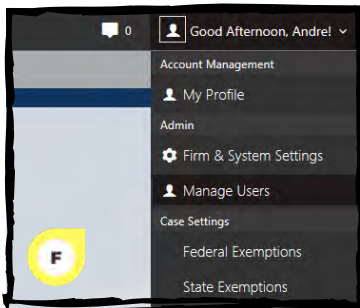
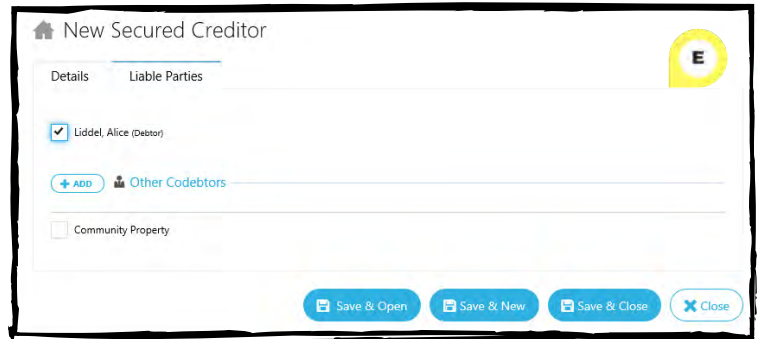
1) When inside a case, click on **PETITION** located in the blue left-hand side panel and hit **CREDITORS** in the drop-down menu (see figure C).

2) To add a liable party to an already existing creditor, click on the desired creditor then the **Liable Parties** tab. Fill out the desired information and then hit the blue **Save** button to the right when finished (see figure D).

*Note: If you are adding a new creditor, push the **+NEW** button*



located to the left of the page (see figure C). In the dialogue window that opens, click on the tab labeled **Liable Parties**. Fill out the desired information and choose one of the saving options (see figure E).



Ⓐ Adding Users:

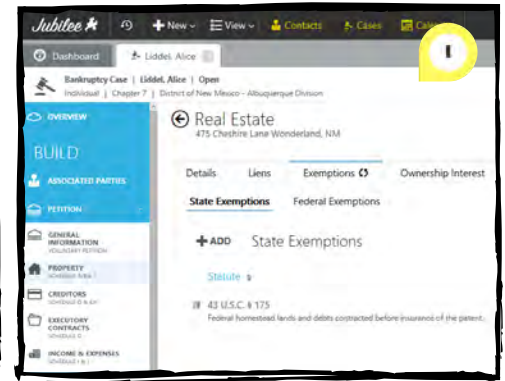
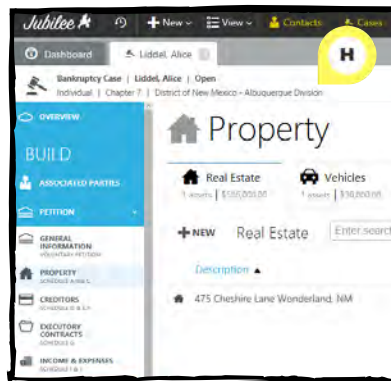
1) Click on the **Profile Menu** (in the top right corner) and click on **Manage Users** (see figure F).

2) Hit the **+NEW** button, fill out the dialogue window and hit **Save & Close** (see figure G). The new user will be sent an activation e-mail to complete their account registration, including creating a password.

Ⓐ Applying Exemptions:

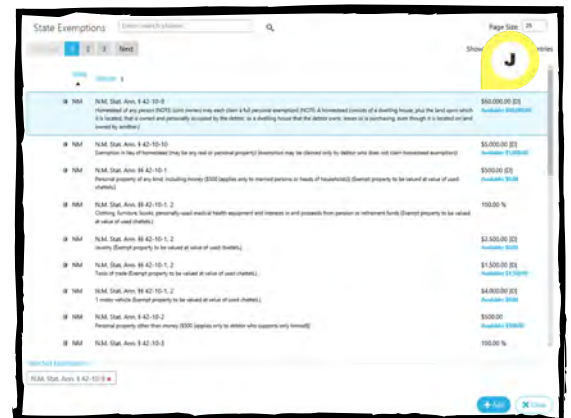
1) To apply exemptions to property items, click on **PETITION** in the blue, left-hand side panel, then on **PROPERTY** in the drop-down menu (see figure H). Select the desired asset to add the exemption to.

2) Click on the **Exemptions** tab then hit the **+ADD** button to see a list of exemptions (see figure I). To find a specific exemption, type in terms related to the exemption in the search bar (see figure J).



Note: Jubilee will not tell you which exemption to use or which are applicable in a certain situation, that is up to the user's discretion. Jubilee will use all the exemptions selected. To learn how to set default exemptions, go to the [Setting Defaults: Exemptions](#) section of this PDF.

3) Click on the desired exemption to select it. The exemption will turn blue and be added to the Selected Exemptions section at the bottom of the dialogue window. To apply the selected exemption, click the blue **+ADD** button in the lower right corner (see figure J).

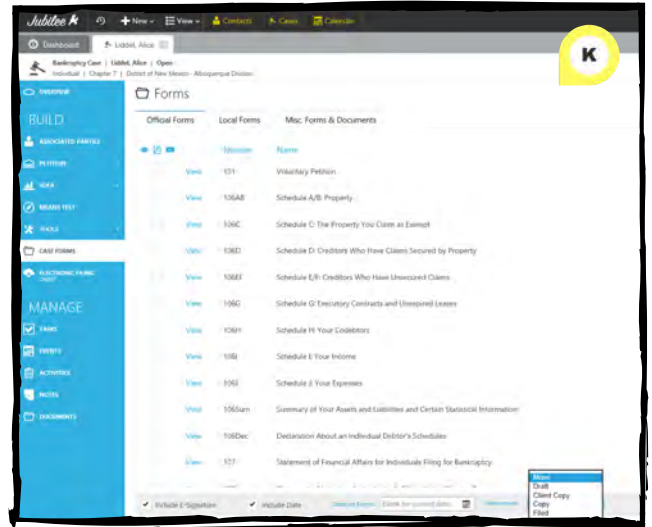


Changing Watermarks:

Note: If your case is locked, you will not have any other watermark options other than draft. To see how to unlock a case, go to the [Unlocking a Case](#) section of this PDF. If your case is unlocked, the default watermark will be set to none, however, it can be changed to client copy, copy, draft or filed.

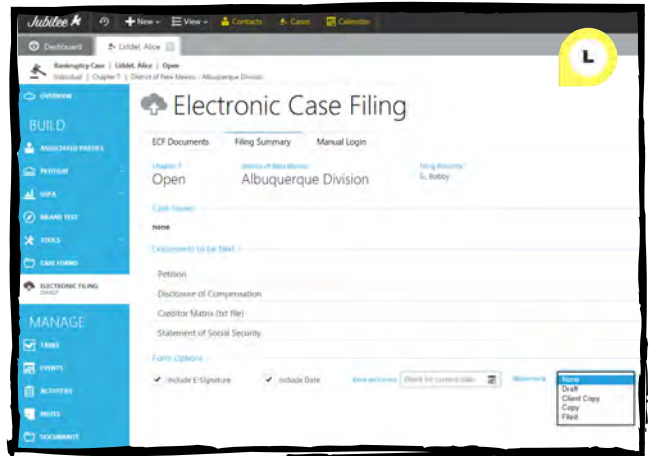
There are two places where your watermark can be changed:

1) In the desired case, click on **CASE FORMS** in the blue side panel to the left. At the bottom of the page, there is a section that says Watermark (in blue) next to a white box. When you click on the box, you will see a list of watermark options to choose from (see figure K).

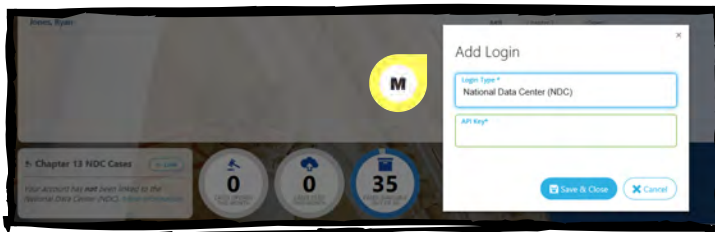


Note: When you change the watermark, it will automatically change on all the forms.

2) Once in the desired case, click on **ELECTRONIC FILING** in the blue sidebar to the left. Hit the blue button at the bottom right that says **Continue to Filing Summary**. Under the Form Options section, the word Watermark (in blue) is next to a white box. Clicking the box shows a list of watermark options to choose from (see figure L).



Note: When you change the watermark, it will automatically change on all the forms.

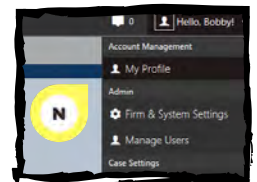


Connecting Your Account to National Data Center (NDC):

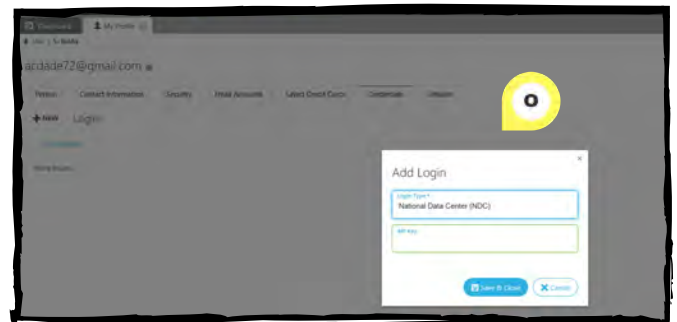
There are three ways to connect your account to NDC:

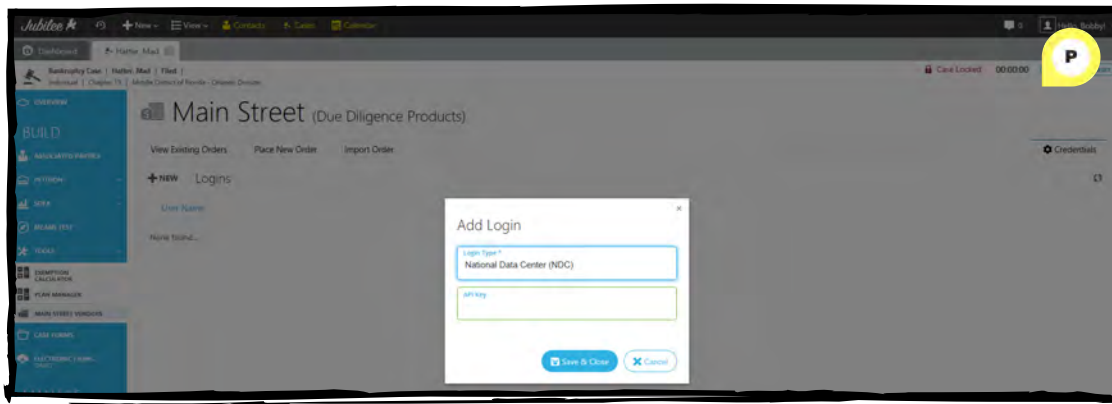
Note: A Jubilee subscription and NDC API key is needed for this feature. You can contact NDC to request an API key at <https://www.ndc.org/>.

1) On the dashboard, in the section labeled NDC Cases, click on the blue **LINK** button in the right corner. This will prompt you to input an API Key to establish a connection. Once the key is entered, hit **Save & Close** (see figure M).



2) By clicking on the **Profile Menu** (where your name is located in the top right corner) you will get a drop-down menu. Click on the button labeled **My Profile** (see figure N) and once on that page, click on the **Credentials** tab. Hit the **+NEW** button on this page and a new dialogue window will open. In the section labeled Login Type, click on the drop-down option **National Data Center (NDC)**. This will prompt you to put in an API KEY, then hit **Save & Close** (see figure O).



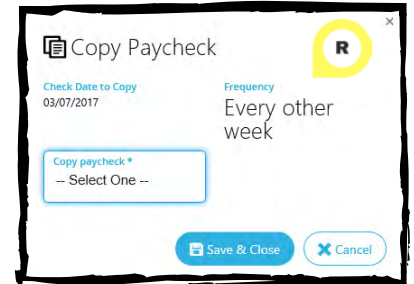
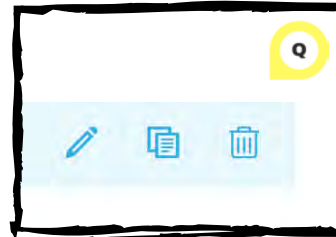


3) Inside a case, in the blue left-hand side panel, click on the **TOOLS** button. In the drop-down menu hit the **MAIN STREET VENDORS** button. On the right side of the page, click the tab labeled **Credentials**. Hit the **+NEW** button on this page and a new dialogue window will open.

In the section labeled Login Type, click on the drop-down option **National Data Center (NDC)**. This will prompt you to put in an API KEY, then hit **Save & Close** (see figure P).

Copying a Paycheck:

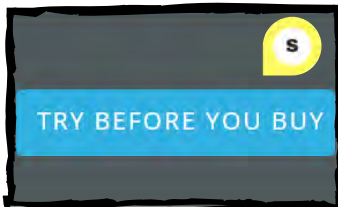
1) In a case, click on the blue **PETITION** button on the left-hand side panel. In the Petition drop-down menu, click on **INCOME & EXPENSES**, and on this page, click on **Employment Income**.



2) Hover over the paycheck you want to copy until it is highlighted in blue. On the right side, three icons will appear, a pencil (edit), two pieces of paper (copy), and a trash can (delete) (see figure Q). Hit the **Copy** (two pieces of paper) button. Fill out the dialogue window for the information you want to copy and hit **Save & Close** (see figure R).

Note: There is a filter towards the top of the page to see the paychecks used for Schedule I, Means Test calculations or all the paychecks that have been entered.

Creating an Account:



Note: If you want to add another person to your Jubilee account, see [Adding Users](#).

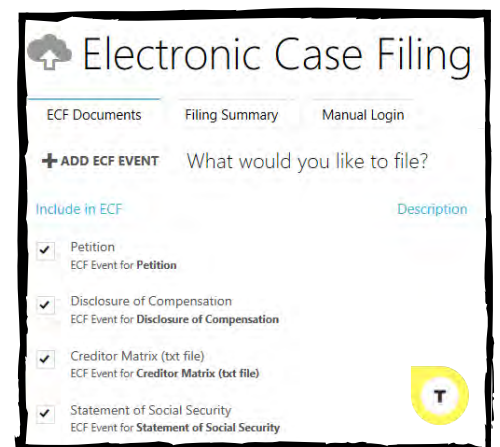
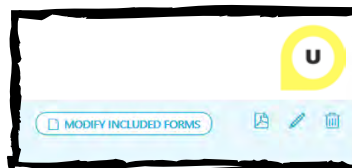
1) To create an account, go to jubileebk.com and click on the blue **Try Before You Buy** button at the top right (see figure S). Fill out the following information and look for an email from us with an email verification link to complete the setup of your account.

Filing a Bare Bones Case:

1) Inside a case, click on the **ELECTRONIC FILING** button in the blue left-hand side panel.

2) On the page, in the Included in ECF section, all the selected or checked items will be filed as a separate event with the Bankruptcy Court (see figure T). Uncheck any items you do not want filed at this time.

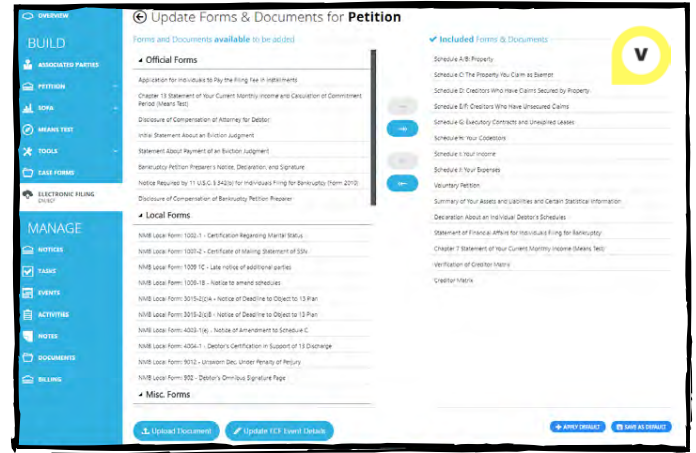
3) Hover over the Petition section until it turns blue. To the right-hand side, click on the **MODIFY INCLUDED FORMS** button (see figure U). Select the items you want included in



your bare bones case by either adding or excluding forms (see figure V). The forms can be rearranged to your preference by clicking and dragging them in the desired order.

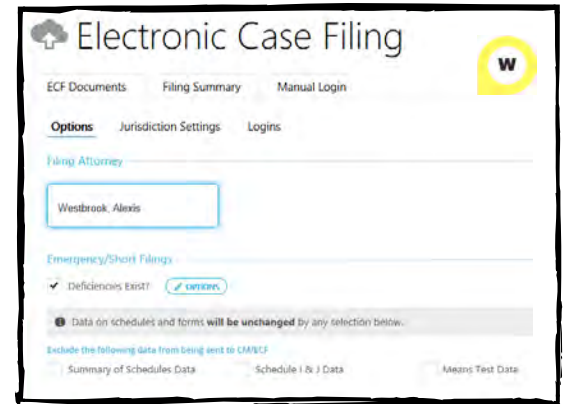
4) In the left corner of the page, click on the arrow beside Update Forms & Documents for Petition to return to the main Electronic Filing page. Verify that the forms to be filed with the court are correct. For example, verify that the Statement of SSN court event matches what's included in the PDF.

5) Once everything is verified, click on the **Settings** tab in the top right corner. In the section labeled Emergency/Short Filings, check the **Deficiencies Exist?** box (see figure W).



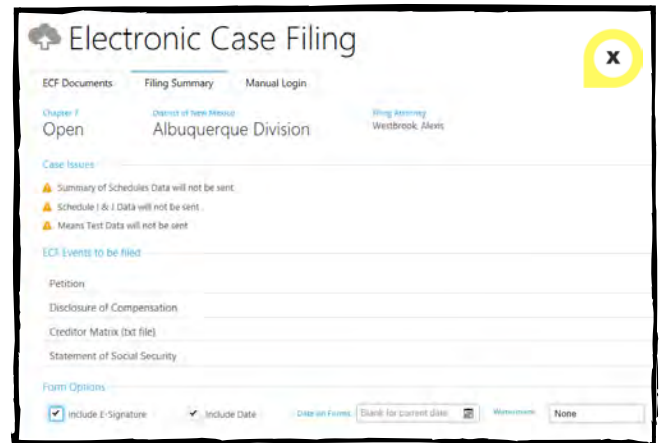
Note: Once the Deficiencies Exist? box is checked, a blue Options button will appear next to it (see figure W). If your court has special requirements for bare bones filings, this is where you can change your deficiency options.

6) Underneath the Deficiencies Exist? button, check any information you wish to withhold from being sent to CM/ECF (see figure W).



7) If you have not already entered your ECF Login credentials, you can do this now by clicking the **Logins** tab (see figure W), hitting the **+NEW** button, filling out the dialogue window and hitting **Save & Close**.

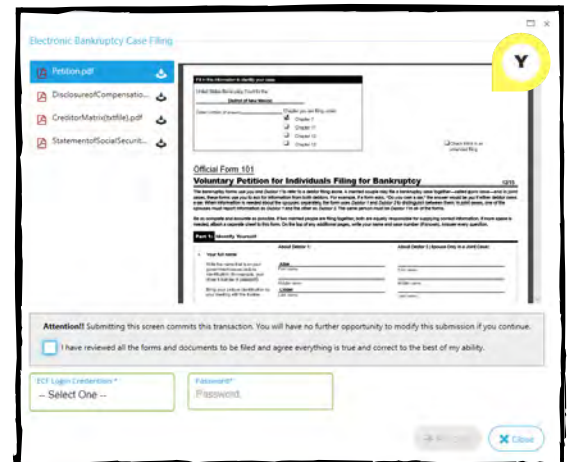
8) Once the desired settings are complete, click the **Filing Summary** tab in the top left of the page. On this page, Jubilee will warn you if there is any information being withheld from being filed with the court (see figure X).



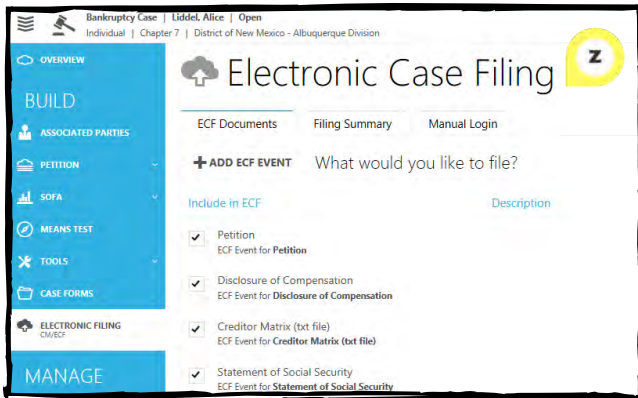
Note: Under the Form Options section of this page, you have the option to include the Electronic Signature and Date on the signature pages (see figure X).

9) On the Filing Summary tab, click on the blue **Review Documents & File Case** button at the bottom right of the page. A new dialogue window will open (see figure Y). Select the appropriate PDFs to preview the forms.

10) When finished reviewing the PDFs, check the **Attention** box below the PDFs, enter your ECF Login Credentials and hit the blue button labeled **File Case**.



11) Once successfully submitted, a new dialogue window will open with your receipt (which is saved in the Documents section). Hit the blue **Close** button at the bottom of the dialogue window when finished looking at the receipt.



Filing a Case:

1) Inside a case, click on the **ELECTRONIC FILING** button in the blue left-hand side panel.

2) On the page, in the Included in ECF section, all the selected or checked items will be filed as a separate event with the Bankruptcy Court (see figure Z). Uncheck any items you do not want filed at this time.

3) Hover over the Petition section until it turns blue. To the right-hand side, click on the **MODIFY INCLUDED FORMS** button (see figure AA). Select the items you want to include in your bare bones case by either adding or excluding forms (see figure AB). The forms can be rearranged to your preference by clicking and dragging them in the desired order.

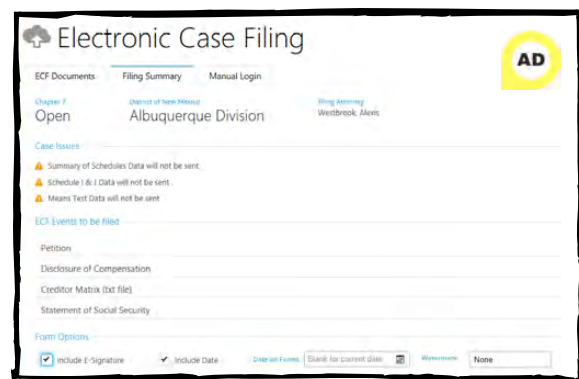
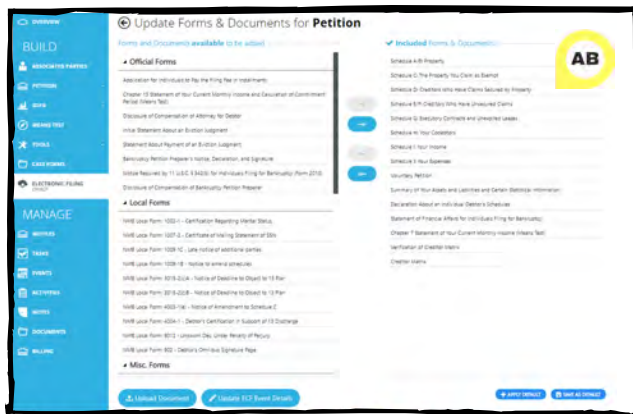
4) In the left corner of the page, click on the arrow beside Update Forms & Documents for Petition to return to the main Electronic Filing page. Verify that the forms to be filed with the court are correct. For example, verify that the Statement of SSN court event matches what's included in the PDF.

5) If you have not already entered your ECF Login credentials, you can do this now by going to **Settings** in the top right corner. Click on the **Logins** tab (see figure AC), hit the **+NEW** button, fill out the dialogue window and hit **Save & Close**.

6) Once your credentials are entered, click on the **Filing Summary** tab in the top left of the page. On this page, Jubilee will warn you if there is any information being withheld from being filed with the court (see figure AD).

Note: Under the Form Options section of this page, is the option to include the Electronic Signature and Date on the signature pages (see figure AD).

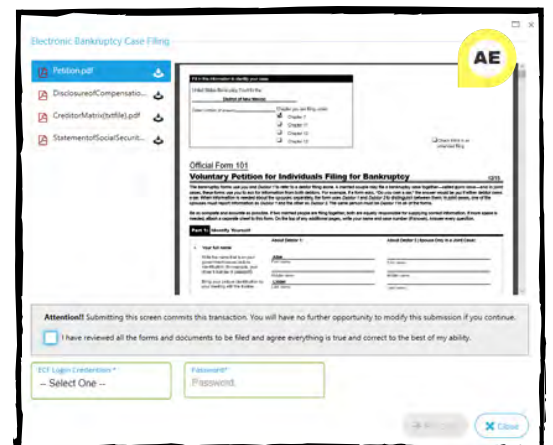
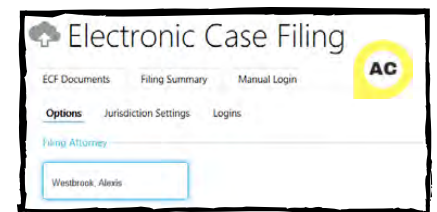
7) On the Filing Summary tab, click on the blue

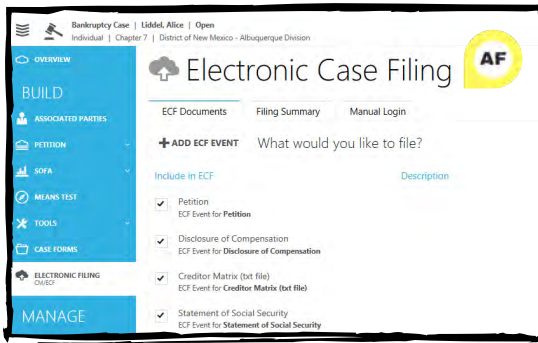


Review Documents & File Case button at the bottom right of the page. A new dialogue window will open (see figure AE). Select the appropriate PDFs to preview the forms.

8) When finished reviewing the PDFs, check the **Attention** box, enter your ECF Login Credentials and hit the blue button labeled **File Case**.

9) Once successfully submitted, a new dialogue window will open with your receipt (which is saved in the Documents section). Hit the blue **Close** button at the bottom of the dialogue window when finished.

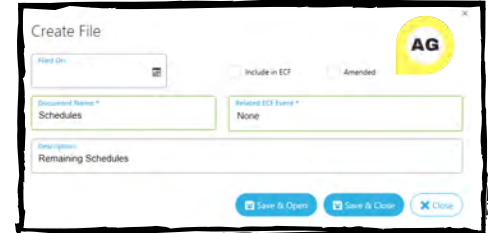




Ⓐ Filing Remaining Docs for a Bare Bones Case:

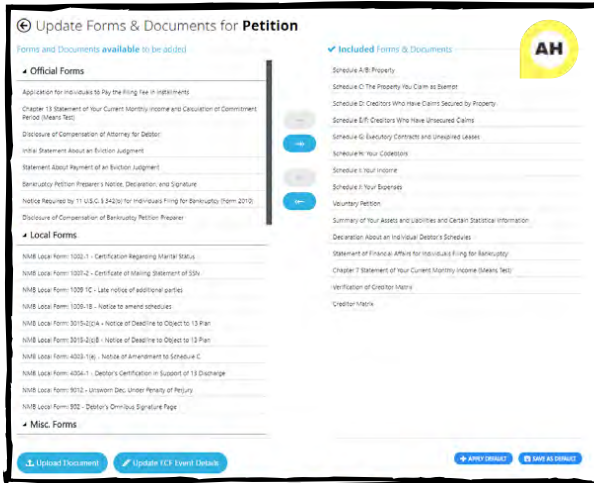
1) Inside a case, click on the **ELECTRONIC FILING** button in the blue left-hand side panel (see figure AF).

2) Hit the **+ADD ECF EVENT** button to create a new item to be filed with the bankruptcy court. Fill out the dialogue window then hit **Save & Open** (see figure AG).



Note: Depending on your court's requirements, you may need to add more than one ECF Event.

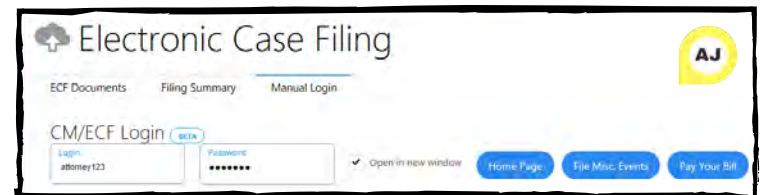
3) Select or upload the forms you want included in the filing (see figure AH).



Note: To select the forms, click the desired ones in the section called Forms and Documents available to be added. Click the blue, single arrow pointing to the right. The selected forms have now been moved to the section labeled Included Forms & Documents. To upload a form, click the blue Upload Document button. Hit Add File in the new dialogue window, select the desired file and click Upload & Close. The file has been added to the Included Forms & Documents section (see figure AH). Once the forms are selected, they can be rearranged to your preference.



5) To generate a PDF of the added events, hover over the event until it turns blue and click the **PDF** icon that is in-between the **MODIFY INCLUDED FORMS** button and pencil icon (see figure AI). The generated events will be saved to your downloads folder.



6) If your login information has not been saved in Jubilee, it can be entered by clicking on **Settings** (in the top right corner of the page) and then on the subtab **Logins**. Hit the **+NEW** button, fill out the dialogue window and hit **Save & Close**.

7) When all ECF Events are added, click the **Manual Login** tab at the top of the page and select your Login and Password. Check the box next to **Open in new window** and click the blue **Home Page** button (see figure AJ). Now that you have been logged in, you can file your case.

Note: Jubilee can log you into the bankruptcy court, but you will need to navigate the court website to file the documents.

Ⓐ Linking, Re-Linking & De-Linking a Case to National Data Center (NDC):

Note: Jubilee will automatically link a case to the National Data Center (NDC) by using the case number and jurisdiction. The information provided to the National Data Center (NDC) is updated at different intervals based on your Trustee. Check the NDC website for more information: <https://www.ndc.org>

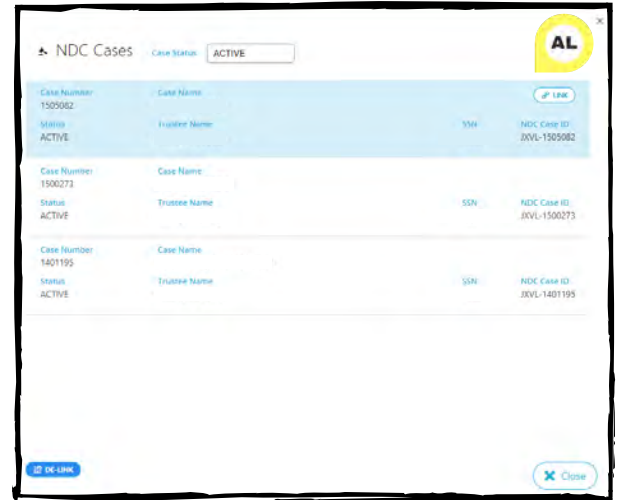
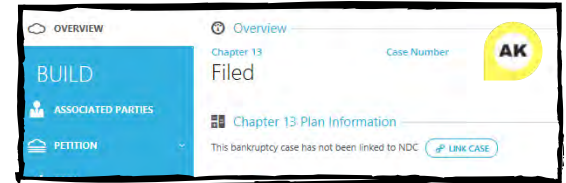
Linking a Case:

1) Within a filed Chapter 13 case, click the blue **OVERVIEW** button in the blue left-hand side panel.

2) Under the Chapter 13 Plan Information section, click the blue **LINK CASE** button. This will open a new dialogue window with a list of all the cases connected to your NDC account (see figure AK).

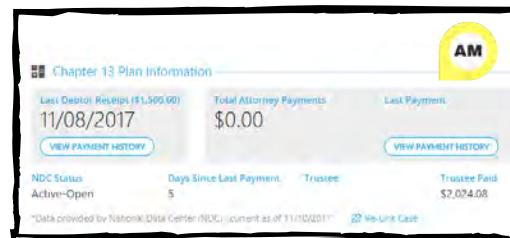
Note: Sensitive information in screenshots have been blocked.

3) Hover over the desired case until it turns blue, then click the blue **LINK** button in the top right corner (see figure AL). Your NDC case is now connected to your Jubilee case.



Re-Linking a Case:

1) If your case is linked to the wrong NDC case, click the **OVERVIEW** button in the blue left-hand side panel in the desired case.



2) Under the Chapter 13 Plan Information section, click the blue **Re-Link Case** button (see figure AM). Once clicked, a new dialogue window will open.

3) Hover over the desired case until it turns blue, then click the blue **LINK** button in the top right corner (see figure AL, sensitive information has been blocked). The NDC case is now connected to your Jubilee case.

De-Linking a Case:

1) If you do not want an NDC case associated with your case, you can de-link it by clicking **OVERVIEW** in the blue left-hand side panel in the desired case.

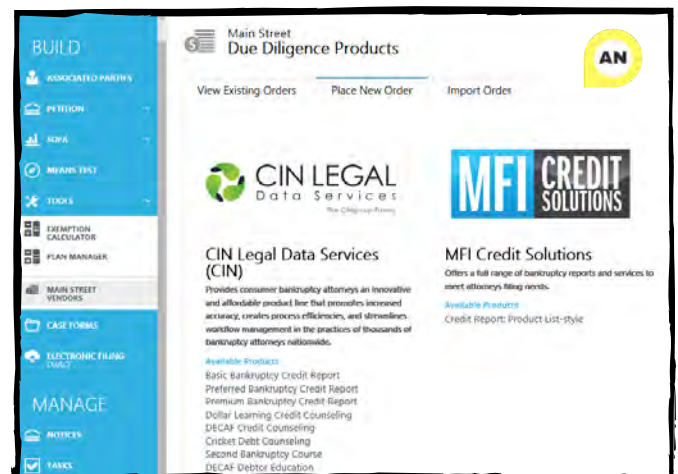
2) Under the Chapter 13 Plan Information section of the page click on the blue **Re-Link Case** button (see figure AM). Once the new dialogue window opens, click the blue **DE-LINK** button located at the bottom left (see figure AL, sensitive information has been blocked). Your case is now disconnected from NDC.

Ordering a Credit Report:

1) Inside a case, in the blue left-hand side panel, click on **TOOLS**, then on **MAIN STREET VENDORS** in the drop-down menu.

Note: If you have not entered your credentials yet, you can do so by clicking on the **Credentials** tab in the top right of the page. Hit the **+NEW** button, fill out the dialogue window and hit **Save & Close**.

2) Click on the **Place New Order** tab and choose the desired vendor (see figure AN). Fill out the order details and click the blue **Place Order** button in the bottom right. The View Existing Orders tab is where the order will appear when processed.





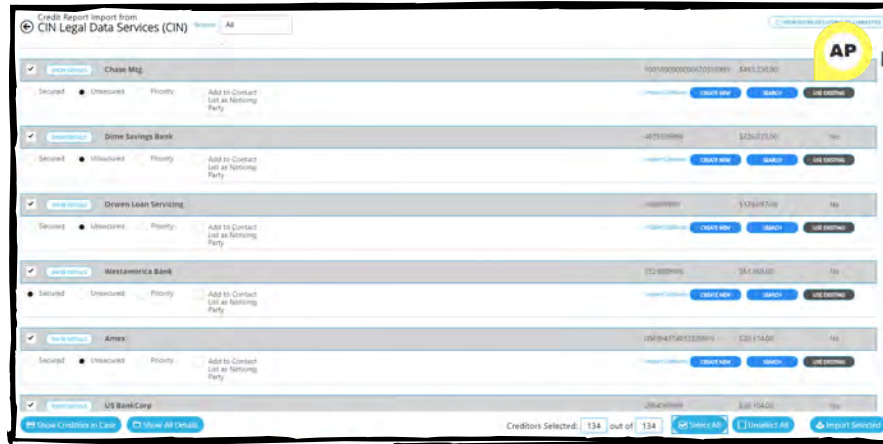
Importing a Credit Report:

1) After a credit report order has been placed, the data can be imported by clicking on **TOOLS** (in

the desired case) then on **MAIN STREET VENDORS** in the drop-down menu.

2) On the View Existing Orders tab, hover over the order you want to import and, to the right side, click on the blue **IMPORT CREDIT REPORT DATA** button (see figure AO).

Note: To view or download the PDF version of the credit report, hover over the order, then click the blue **VIEW CREDIT REPORT PDF** button on the right side (see figure AO).



3) To import all creditors, click the blue **Select All** button to the bottom right. To import certain creditors check the box next to the ones you want to import. Select the desired settings for each creditor (ex. set them as secured, priority or unsecured). When the creditors and settings are selected, click the blue **Import Selected** button at the bottom right (see figure AP).

Note: If you check the checkbox next to **Add to Contact List as Noticing Party**, it will do so when the creditors are being imported (see figure AP).

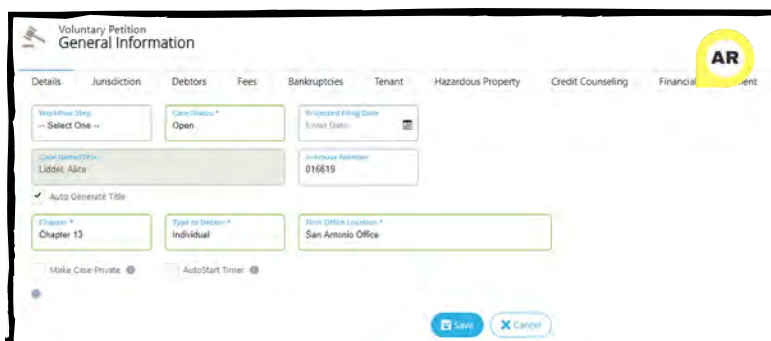
4) When Jubilee is done importing the selected creditors, in the blue left-hand side panel, click on **PETITION**. In the drop-down menu, click on **CREDITORS**. All the imported creditors are grouped by type (Secured, Priority or Unsecured) and the noticing parties have been added to your contact list as a noticing party (see figure AQ).

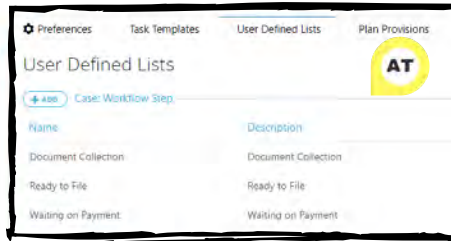
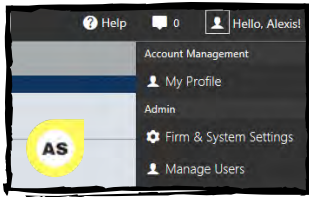
NEW	Secured Creditors	Unsecured Amount	Claim Amount	Assignee
American Bank Of	Acc: 1487708610999	\$0.00	\$0.00	
Camper Auto Finance	Acc: 209999	\$14,106.00	\$14,106.00	
Chase Auto Finance	Acc: 011214270999	\$16,868.00	\$16,868.00	
Chase Auto Finance	acc: 3657999	\$0.00	\$0.00	
Chase Mtg	Acc: 1506513999	\$1,136,708.00	\$1,136,708.00	
Chase Mtg	Acc: 15065440999	\$740,325.00	\$740,325.00	
Chase Mtg	Acc: 1506701999	\$564,870.00	\$564,870.00	
Chase Mtg	Acc: 10010800000001020999	\$493,330.00	\$493,330.00	
Chase Mtg	acc: 1006610999	\$1,136,708.00	\$1,136,708.00	
SECURED CREDITORS TOTAL:				\$4,403,876.00

Setting a Workflow Step:

1) Inside a case, click on **PETITION** in the blue left-hand side panel. In the drop-down menu, hit the **GENERAL INFORMATION** button. Under the Details tab, click on the box labeled **Workflow Step**. In the drop-down menu, choose the option that reflects what stage your case is at (see figure AR).

Note: To customize the drop-down menu for Workflow





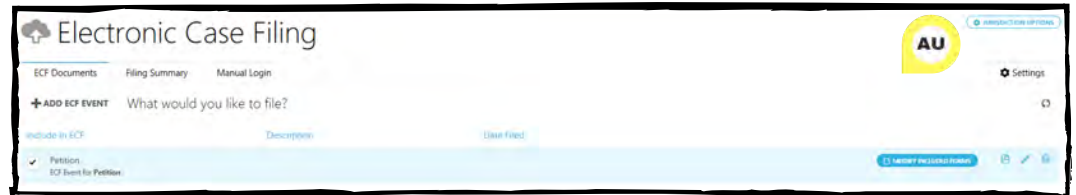
Step (e.g., Waiting on Payment, Document Collection, Ready to File), click the **Profile Menu** in the top right corner then hit **Firm & Systems Settings** (see figure AS). In the blue left-hand side panel, click on **FIRM PREFERENCES & DEFAULTS** then on the **User Defined Lists** tab. Scroll down to the section called **Case: Workflow Step** and click the blue **+ADD** button (see figure AT). Create the option you want in drop-down menu and hit **Save & Close**.

figure AT). Create the option you want in drop-down menu and hit **Save & Close**.

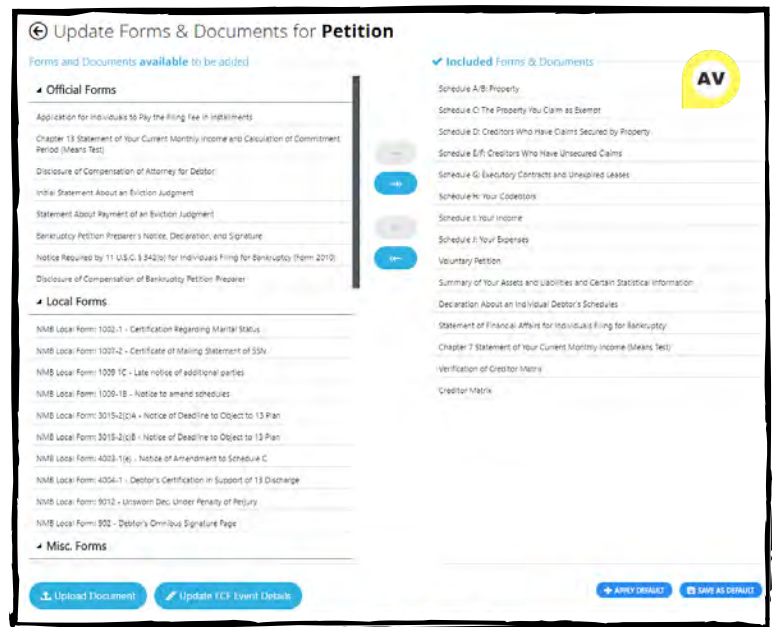
Setting Defaults:

Forms:

1) Inside a case, click on the blue **ELECTRONIC FILING** button in the left-hand side panel and hover over the section labeled **Petition** until it turns blue. Click the **MODIFY INCLUDED FORMS** button (see figure AU).



2) Chose the forms you want in the Included Forms & Documents section by adding or removing them (see figure AV). Once the desired forms are selected, they can be rearranged in the desired order.

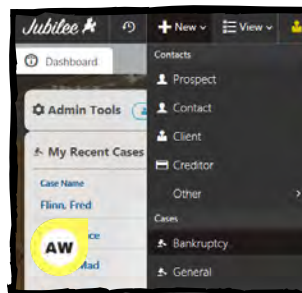


Note: To add forms to the Included Forms & Documents section, click the forms in the Forms and Documents available to be added section that need to be moved (see figure AV). Click the blue, single arrow pointing to the right. The selected forms will be moved to the section labeled Included Forms & Documents. To remove forms, click the forms you don't want in the Included Forms & Documents section and hit the blue, single arrow pointing to the left. The selected forms have now been moved to the section labeled Form and Documents available to be added. To rearrange forms in the Included Forms and Documents section, click and drag the form to the desired arrangement.

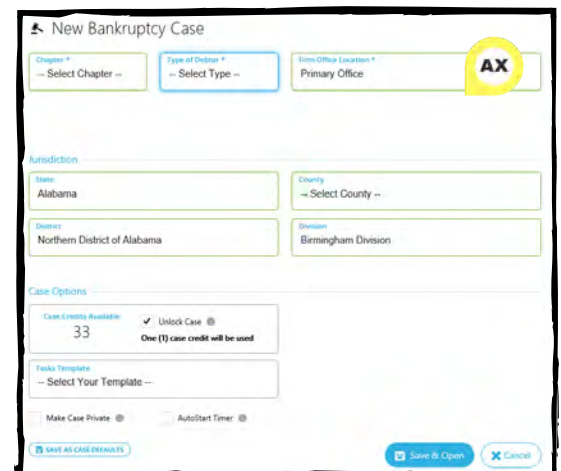
3) Once the desired forms are chosen and arranged in order, hit the **SAVE AS DEFAULT** button at the bottom right of the page (see figure AV).

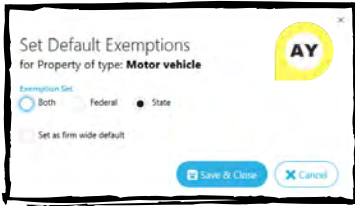
Filing Jurisdictions:

1) Setting a default jurisdiction can be done when creating a new case. Click the **+New** button in the taskbar (top left corner), then hit **Bankruptcy** (see figure AW).



2) In the new dialogue window, fill out the Jurisdiction section. In the bottom, left corner, hit the blue **SAVE AS CASE DEFAULT** button (see figure AX).





Exemptions:

1) To set default exemptions, inside a case, click on the blue **PETITION** button to the left-hand side panel. In the drop-down menu, hit **PROPERTY**.

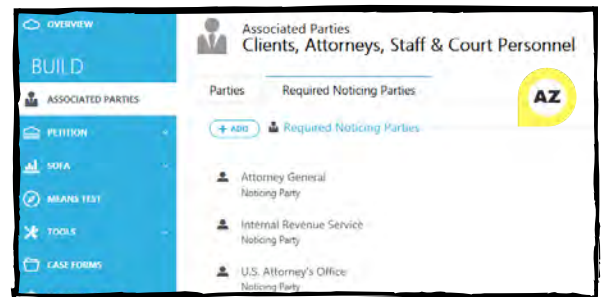
2) Choose a piece of property (an asset from the Real Estate, Vehicle, Household Items, etc. tabs). Once the property is chosen, click on the **Exemptions** tab and add the exemptions you want to save as a default by clicking the blue **+ADD** button.

3) Click the blue **SAVE AS DEFAULT** button on the right and fill out the new dialogue window (see figure AY).

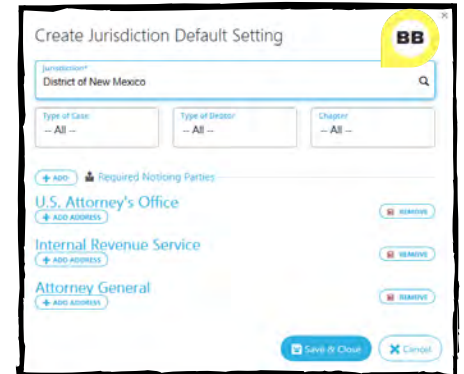
Note: Default exemptions cannot be set for Real Property assets that are not defined as Principal Residence (homestead).

Required Noticing Parties:

1) Inside a case, click on the blue **ASSOCIATED PARTIES** button in the left-hand side panel then on the **Required Noticing Parties** tab (see figure AZ).

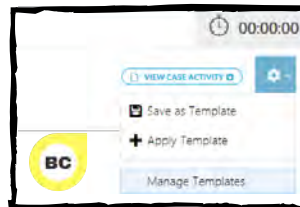


2) Click the blue **SAVE AS DEFAULT NOTICING PARTIES** button to the right side (see figure BA) and fill out the dialogue window (see figure BB). Filters can be added if you want the parties to only be applied to a certain type of case, debtor and/or chapter). Add parties by clicking the blue **+ADD** button next to the Required Noticing Parties section and remove parties by clicking the blue **REMOVE** button next to the party (see figure BB). Hit **Save & Close** once all parties have been added.

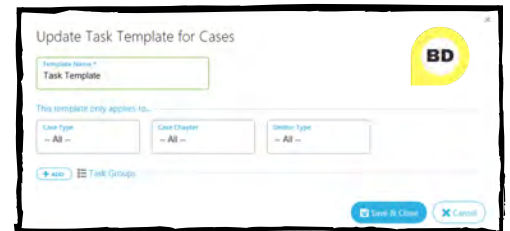


Tasks:

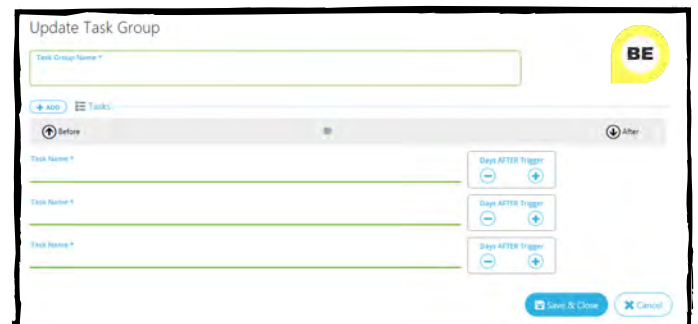
1) To set a list of default tasks, inside a case, click on **TASKS** (under the MANAGE section) in the blue left-hand side panel. Click on the gear icon to the right of the page and in the drop-down menu, hit **Manage Templates** (see figure BC).



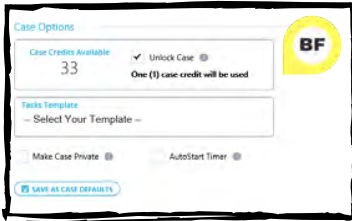
2) In the top left corner, hit the **+NEW** button, fill out the new dialogue window and click **Save & Close**.



3) Once closed, click on the task template you created. At the bottom of the dialogue window, more options have become available (see figure BD). To add a task group, click the **+ADD** button next to the section. Fill out the dialogue window by adding a task group name and tasks (see figure BE). Once done, hit **Save & Close**, then on the main dialogue window hit **Save & Close**. The task template is now ready to be added to any case.



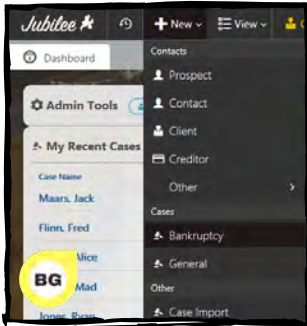
Note: When adding tasks, a movable section bar can be placed before or after certain tasks. To learn more about this, hover over the **I** icon in the middle of the bar (see figure BE).



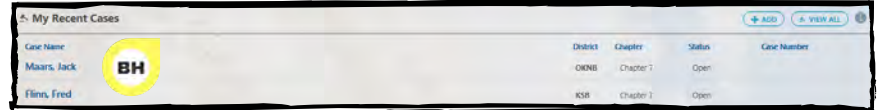
Starting a New Case:

Note: For Jubilee subscriptions a Case Options section is in the dialogue window when creating a case (see figure BF). By default, the box is checked to unlock the case, using a case credit. Unchecking this box will not use a case credit and the forms will print with a Draft watermark.

There are three places a new bankruptcy case can be created:



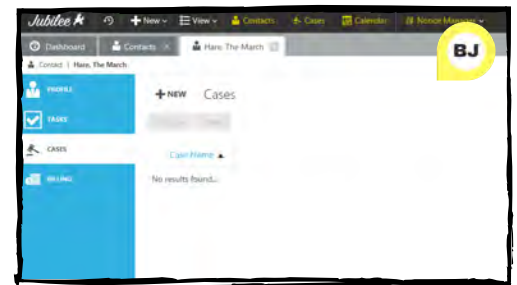
1) On the taskbar, at the top of the page, hit the **+New** button. In the drop-down menu, under the section labeled Cases, click on **Bankruptcy** (see figure BG). A new dialogue window will open where you can begin your case.



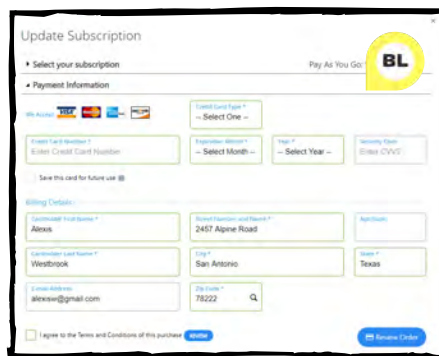
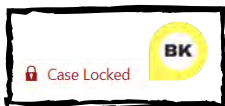
2) On the dashboard, in the My Recent Cases section, click the blue **+ADD** button on the right side (see figure BH). Click on Bankruptcy (see figure BI) and a new dialogue window will open where you can begin your case.



3) On the taskbar at the top of the screen click on the **Contacts** button. This takes you to a list of all the contacts that have been entered in Jubilee. Click on the desired contact you would like to start a case for and on the blue left-hand side panel, click the **CASES** button (see figure BJ). From here, click the **+NEW** button in the top left of the page and on the new dialogue window, click the **Bankruptcy** button (see figure BI). A new dialogue window will open where you can start your case.



Note: If you decide to start a new case from here, the debtor's information will automatically be pulled into the case.



Unlocking a Case:

Pay Per Case Method:

Note: With this license, all cases that are created are automatically locked and the official forms will print with the draft watermark.

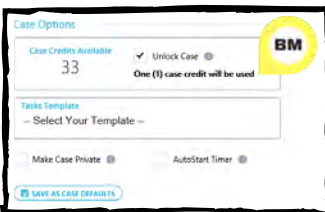
1) Within the case, click on the red **Case Locked** button at the top of the page (see figure BK). In the

new dialogue window, click **One-Time** for the Subscription Type then on the **Pay As You Go** box.

2) Enter your credit card information (the Billing Details section will automatically pull in your account information), check the box agreeing to the terms and conditions, then click the blue **Review Order** button in the bottom right (see figure BL). The payment will be processed immediately and the case will be unlocked and the watermark removed.

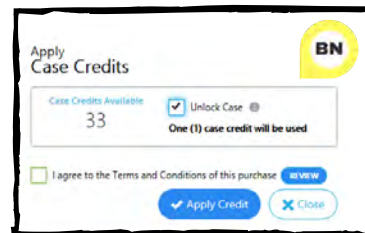
Subscription Method:

Note: When creating a new case, there is an option to unlock the case immediately, using one of your case credits (see figure BM).



1) Inside a case, click on the red **Case Locked** button at the top of the page (see figure BK). A new dialogue window will open.

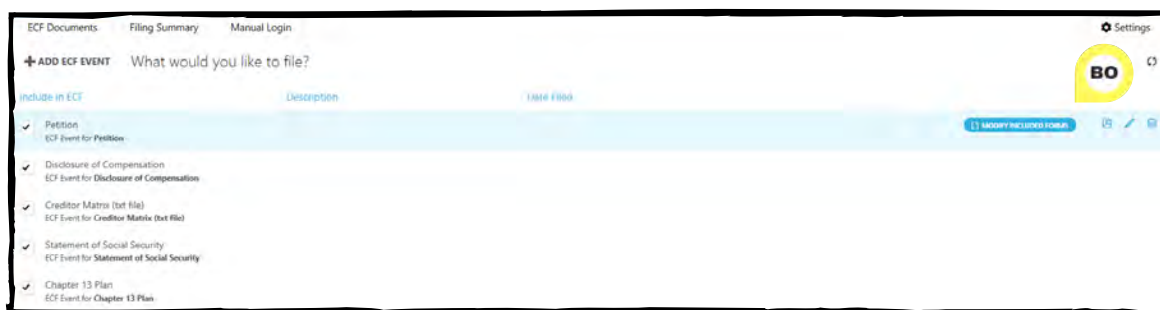
2) To use an available case credit, check the box agreeing to the terms and conditions, then click the blue **Apply Credit** button (see figure BN). The case will then be unlocked and the watermark removed.



Note: If you have run out of case credits to use, a dialogue window will open where cases can be purchased in blocks of ten.

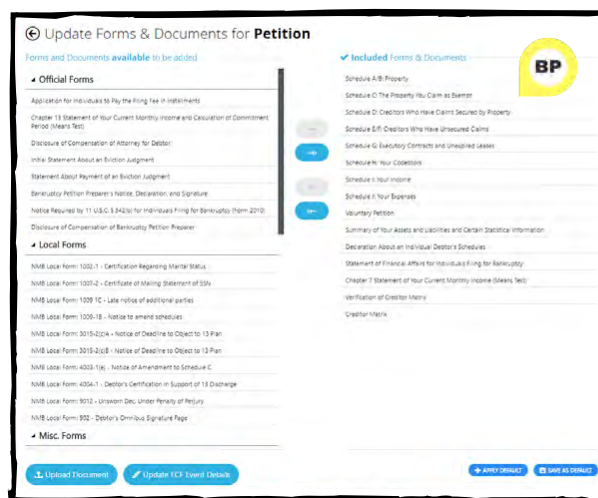
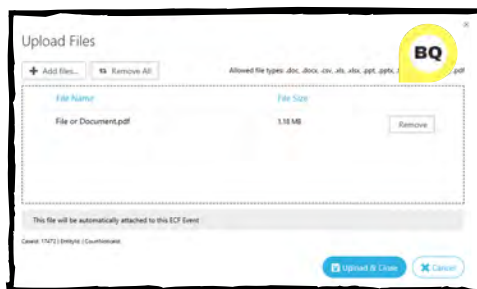
Uploading Forms & Documents:

1) Inside a case, click on the blue **ELECTRONIC FILING** button in the left-hand side panel. Hover over the desired ECF Event you want a form or document uploaded to until it turns blue, then click the blue **MODIFY INCLUDED FORMS** button (see figure BO).

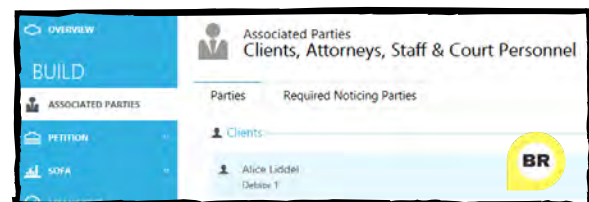


2) At the bottom left of the page, click the blue **Upload Document** button (see figure BP).

3) In the new dialogue window, click **Add files...** in the top left (see figure BQ). Select the file or document you want to upload. Once chosen, hit the blue **Upload & Close**.



Note: Any forms or documents under the Included Forms & Documents section can be rearranged by preference (see figure BP).

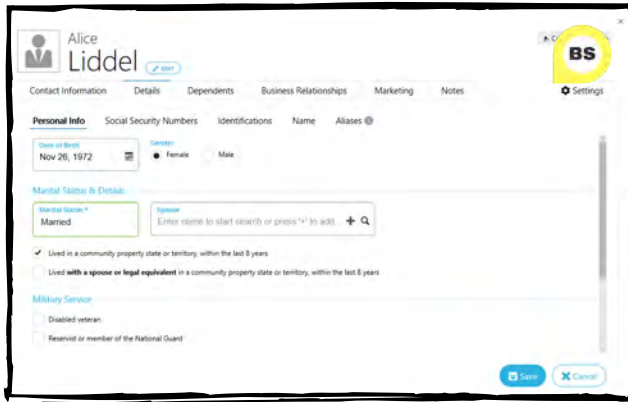


Adding Income for a Non-Filing Spouse:

Note: To add income for a non-filing spouse the debtor's status needs to be set to married and the spouse added as a contact. To change the marital status and add the spouse as a contact, proceed to step one. If both have already been completed, skip to step four.

1) To set the debtor's status to married, inside a case, click the blue **ASSOCIATED PARTIES** tab in the left-hand side panel. On the Parties tab, under the Clients section, click on the debtor's name (see figure BR). A new dialogue window will open.

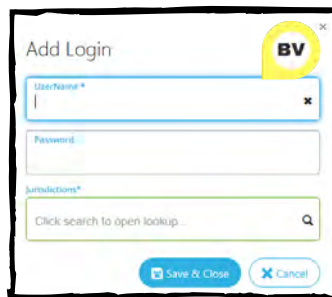
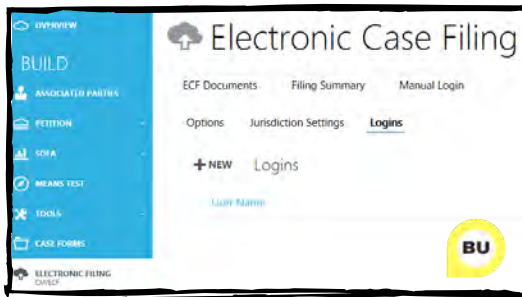
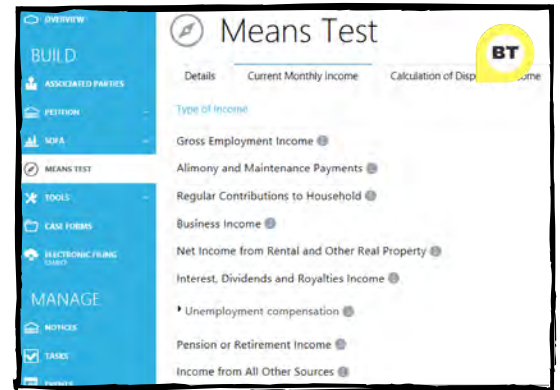
2) On the new dialogue window, click on the **Details** tab. On the Personal Info subtab, in the section called Marital Status & Details, click on the **Marital Status** box. In the drop-down menu, click **Married**. A new box, called Spouse, will appear (see figure BS).



3) To add a spouse that has already been added as a contact, type their name in the box, then click on the contact when Jubilee finds it. To add a spouse as a new contact, click the + button, fill out the new dialogue window, then hit the blue **Save & Close** button in the bottom right. Once the marital status and spouse have been entered, hit **Save**.

4) To add income for a non-filing spouse, inside a case, click on the blue **MEANS TEST** button in the

left-hand side panel then click on the **Current Monthly Income** tab (see figure BT). Select the type of income you want to add then click on the tab with the non-filing spouse's name. Hit the **+NEW** button in the left corner of the page to add the income.



Ⓐ Entering Your ECF Login & Password:

1) Inside a case, click on the blue **ELECTRONIC FILING** button in the left-hand side panel then click on the **Settings** tab in the right corner. Click on the **Logins** subtab and hit the **+NEW** button to the left of the page to add a new ECF login and

password (see figure BU). Fill out the new dialogue window and hit **Save & Close** (see figure BV).

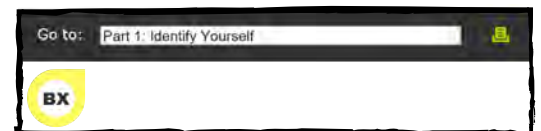
Note: Jubilee saves your ECF Login and Password information for multiple jurisdictions.

Ⓐ Printing Forms:

1) Within the desired case, click on the **CASE FORMS** button in the blue, left-hand side panel. Select the form you want to print by checking the box next to it (see figure BW). Once the form is selected, click the blue **View** button. In the new dialogue window, click the **Print** button located in the top right corner (see figure BX).



Note: To print more than one form at a time, instead of clicking the View button, click the blue **PDF** icon in the top left of the screen (see figure BW). Make sure you are scrolled to the top of the page to see the PDF button. This button will generate the forms into a PDF that can be saved, opened and printed.



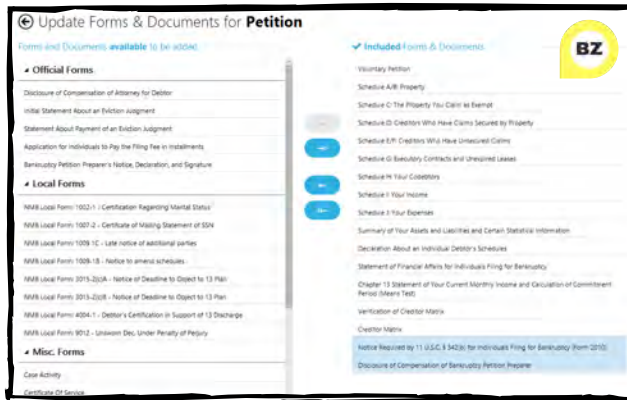
Ⓐ Printing a Client Packet:

1) To print a client packet, inside a case, click on the blue **ELECTRONIC FILING** button in the left-hand side panel. In the section labeled Include in ECF, check the boxes next to the ECF Events you want to print in the client packet (see figure BY).

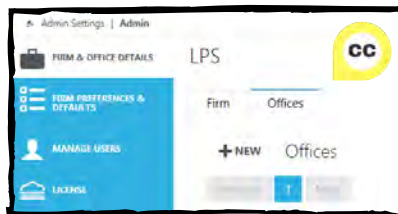
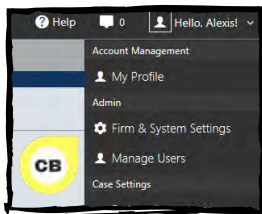
Note: To create a new ECF Event, click the **+ADD ECF EVENT** button in the top left corner (see figure BY). To exclude an ECF Event, uncheck the box next to it. To remove specific forms inside an ECF Event, hover over the event until it turns blue, then click the blue **MODIFY INCLUDED FORMS** button. Select the form you want to exclude in the Included Forms & Documents section, then hit the blue, single arrow pointing to the left (see figure BZ). It has now been moved to the Forms and Documents available to be added section. To get back to the ECF Documents tab, click the black, left pointing arrow in the top left corner of the page (see figure BZ).



2) Click the **Filing Summary** tab and check the section called ECF Events to be filed to confirm what will be included in the client packet (see figure CA). Select the appropriate

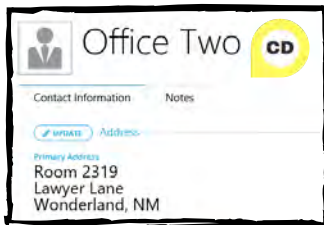


settings in the Form Options section, then click the blue **Print Client Packet** button in the bottom left corner of the page (see figure CA). The packet will begin to generate and download. Once it is saved, it can be opened and printed.



Adding an Office:

1) To add an additional office to your Jubilee account, click on the **Profile Menu**, then click on **Firm & System Settings** in the drop-down menu (see figure CB). On the FIRM & OFFICE DETAILS page, click on the **Offices** tab (see figure CC). To add



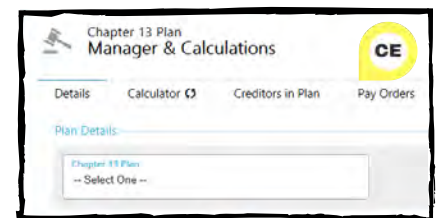
an office, click the **+NEW** button in the left corner of the page (see figure CC). Fill out the new dialogue window and hit **Save & Close**.

Note: To add or change an address to an existing office, click the office name and in the new dialogue window, hit the blue **UPDATE** button next to the Address section and input the desired information (see figure CD).

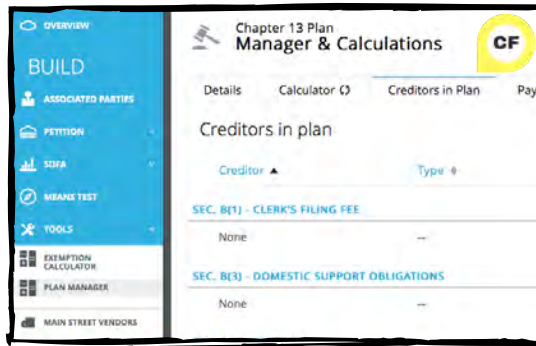
Manually Assign a Creditor to a Chapter 13 Plan Section:

There are two places where you can manually assign a creditor.

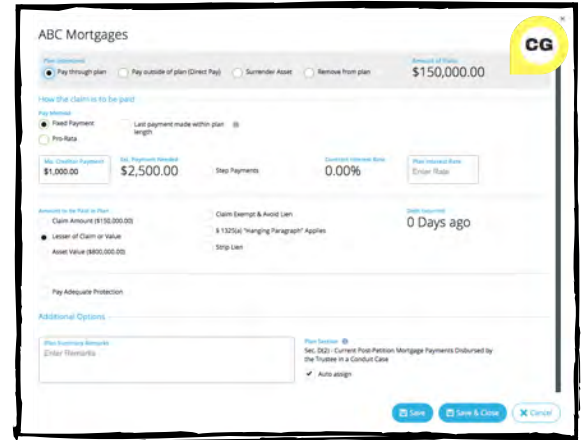
Note: A plan must be selected before the creditor can be manually assigned to a different section. If this has not been done, inside a case, click on the blue **TOOLS** button in the left-hand panel then on **PLAN MANAGER** in the drop-down menu. On the Details tab, under the Plan Details section, click on the **Chapter 13 Plan** box and choose the plan you want (see figure CE).



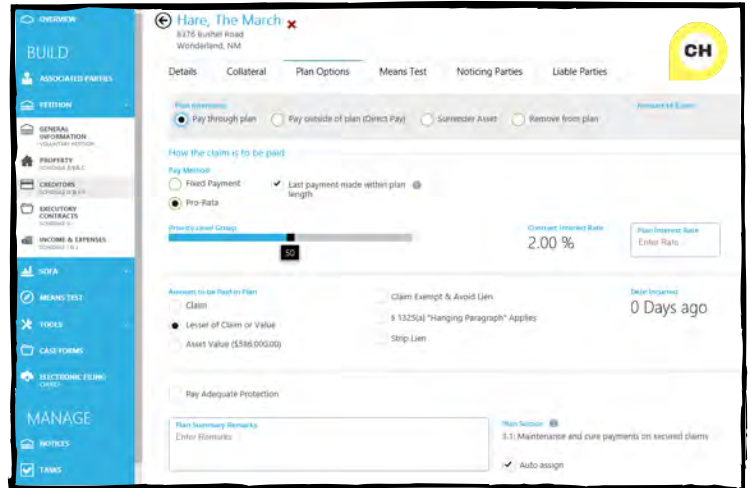
1) In a case, on the left-hand side, click the blue **TOOLS** button, then on **PLAN MANAGER** in the drop-down menu. Click on the tab called **Creditors in Plan** (see figure CF), then on the desired creditor you want to assign to a different



section. At the bottom right of the new dialogue window, there is an area called Plan Section (see figure CG). Uncheck the **Auto assign** box and a Plan Section box will appear. Click on this box and select the new location for the creditor.

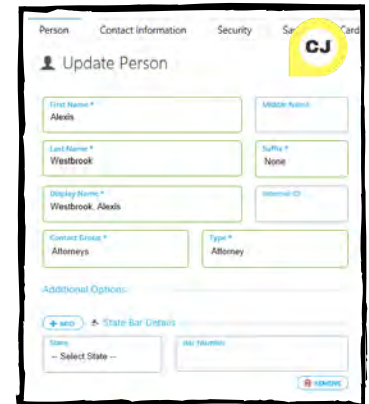
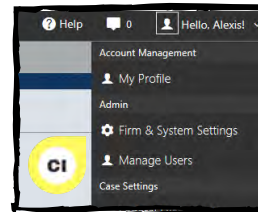


2) Inside a case, click on the **PETITION** button in the blue, left-hand side panel, then on **CREDITORS** in the drop-down menu (see figure CH). Select the creditor you want to manually assign to a different Chapter 13 plan section. Once the creditor is chosen, click on the **Plan Options** tab at the top of the page. Under the section labeled Additional Options, uncheck the **Auto assign** box (see figure CH). A Plan Section box will appear where you can select the new location for the creditor.



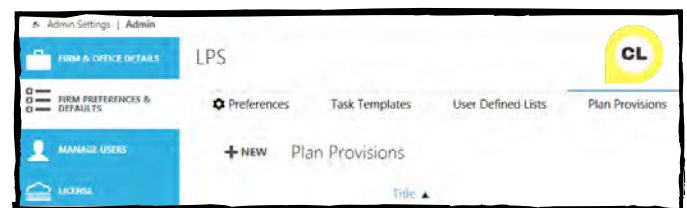
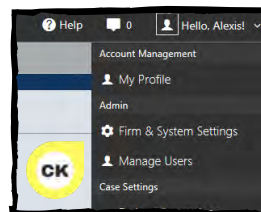
Adding My Attorney Bar Number:

1) To add an attorney bar number, click the **Profile Menu** in the top right corner, then on **My Profile** in the drop-down menu (see figure CI). On the Person tab, there is a section called State Bar Details (see figure CJ). Select the state and enter your bar number. To add another bar number, hit the blue **+ADD** button. To remove one, hit the blue **REMOVE** button next to the desired one.



Adding Special Chapter 13 Plan Provisions:

1) To add a special Chapter 13 plan provision, click on the **Profile Menu**, then on **Firm & System Settings** in the drop-down menu (see figure CK). In the blue, left-hand side panel, click on **FIRM PREFERENCES & DEFAULTS**, then on the **Plan Provisions** tab. Hit the **+NEW** button in the left corner of the page to create a new plan provision (see figure CL). Fill out the new dialogue window and hit **Save & Close**.



For more information on how to do different tasks in Jubilee, feel free to contact us. Continue scrolling down for our contact, tutorial videos, websites and social media 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.

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support@legal-pro.com

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

Tutorial Videos:

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

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

Forum:

<http://forum.legal-pro.com>

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

YouTube Channel: https://www.youtube.com/channel/UCxmiUD-xM_IJUOeWG_WO_wA

Subscribe and be notified when new videos are posted and have first access to it before it goes on our Jubilee website.

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On our main website is where you can find a list of our products, client testimonials, meet the LegalPRO team, pricing and other related information.

Jubilee:

<https://jubileebk.com>

This is where you can find tutorial videos, instructional PDF's, pricing, features, and other information about Jubilee.

Jubilee Application:

<https://jubileebk.net>

This link will take you to the Jubilee application log in page.

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