



Jubilee By the Experts

Getting Started with Jubilee

Feb 16, 2022

Our Host – Dave Danielson

*CEO Resolvent, Student Debt Resolution Software
Former CEO of CINGroup/CINLegal/BestCase*

- **Why Jubilee?** ... *Features/Price v Needs evolves over time*



- **Why Webinar Series?** ... *Change can be hard, Peers can help!*

Agenda

- Getting Started with Jubilee
 - Deciding to move to Jubilee
 - Steps in Conversion
 - How to do familiar actions in Jubilee
- Jubilee Challenges
 - Learning the program
 - Understanding how the parts work
 - Case Preparation
 - Filing a case
- What's new with Jubilee
- Ask the Experts

Our Experts – the team at SolventLaw



Jeffrey Bursell

Jeff Bursell has a proven record of leadership and obtaining great results for his clients. He has represented clients in bankruptcy for 20 years. Solvent was founded on a simple premise – financial hardships are difficult; however, the solution should not be difficult.



Trish Wolter

Trish is a well-versed bankruptcy paralegal with over 10 years helping bankruptcy clients through chapter 7 and chapter 13 bankruptcies. She has assisted clients at all stages of the bankruptcy process.



Kyleigh Stanek

Kyleigh has an extensive background in bankruptcy and brings a warm and caring attitude to clients' needs. With over 10 years' experience in helping clients with filing chapter 7 and chapter 13 bankruptcy,

To learn more about our guest speakers, visit <https://www.solventlaw.com/about/our-team>

Getting Started with Jubilee

- Attorney/Owner Decision Points
- Paralegal Decision Points/Concerns
- Steps in Conversion
- Performing familiar tasks in Jubilee

Attorney/Owner Decision Points

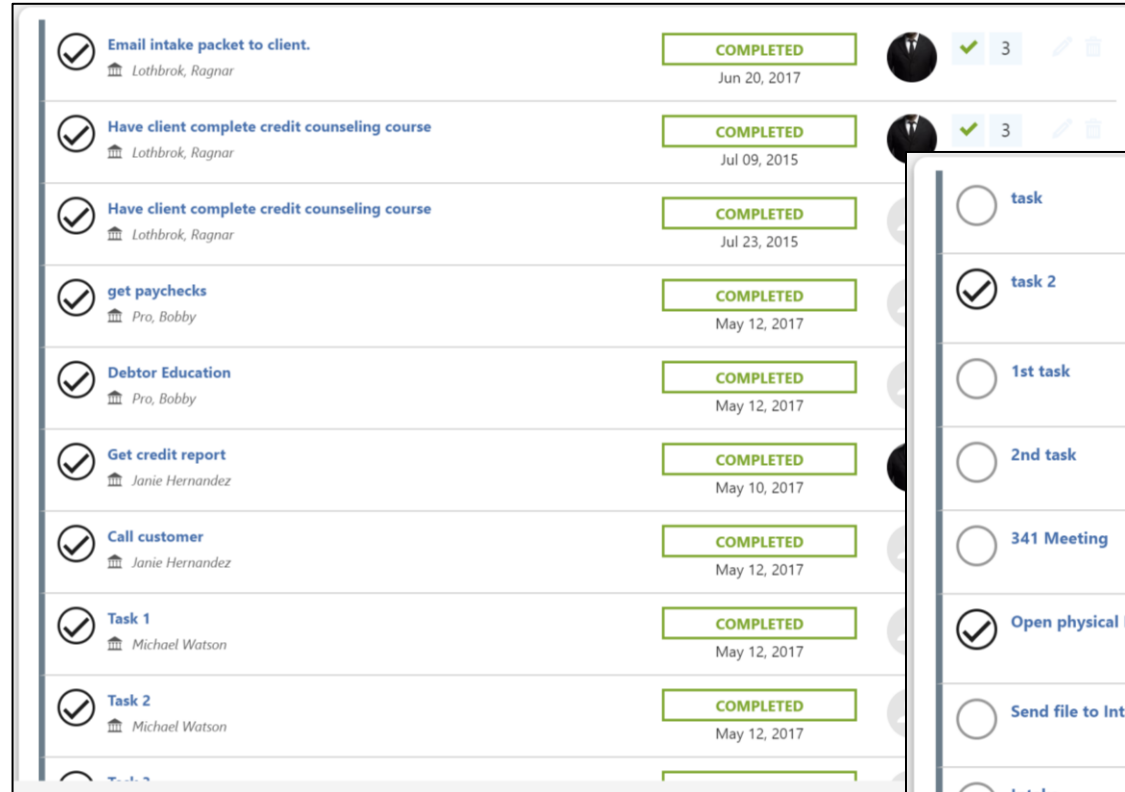
- Multiple Platforms – Do you need them? (e.g. Clio + Jubilee + whatever)
- Cost
 - The Program
 - The Add-ins (Credit Report, Intake Platform)
- Working in a modern/remote world
- Implementation
 - How good is the customer support?
 - What features and improvements are in the roadmap?
 - Will they listen to me?

Paralegal Decision Points/Concerns

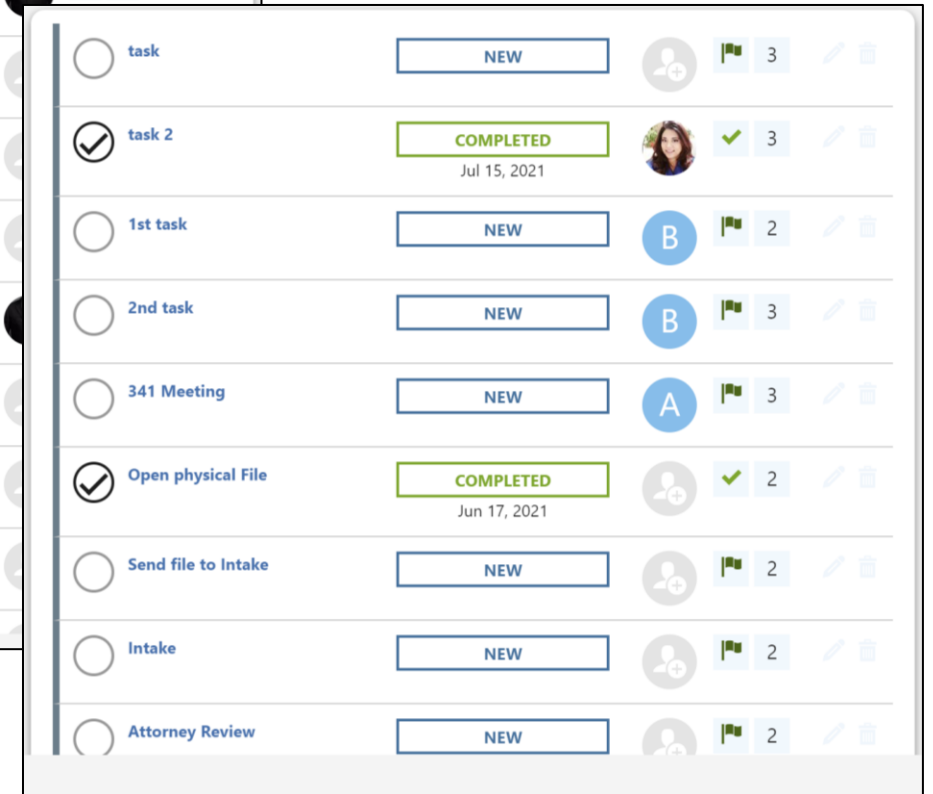
- Concerns
 - Change! Change! Change!
 - Set up for the process to flow
 - Is the program user friendly? How complicated will it be to learn?
- Things that stood out (once we took a look at Jubilee)
 - All in one program
 - Workflow
 - Means test/Non-exempt calc
 - Court Notices

Jubilee Challenges: Where are the items that we use?

- **Tasks**
- Court notices
 - Claims Register
- Calendar
- Documents
- Petition
 - Schedules
 - Means Test
 - Ch. 13 plan
- Client portal
- Exemption Tool



<input checked="" type="checkbox"/> Email intake packet to client. <small>Lothbrok, Ragnar</small>	COMPLETED Jun 20, 2017	3
<input checked="" type="checkbox"/> Have client complete credit counseling course <small>Lothbrok, Ragnar</small>	COMPLETED Jul 09, 2015	3
<input checked="" type="checkbox"/> Have client complete credit counseling course <small>Lothbrok, Ragnar</small>	COMPLETED Jul 23, 2015	3
<input checked="" type="checkbox"/> get paychecks <small>Pro, Bobby</small>	COMPLETED May 12, 2017	3
<input checked="" type="checkbox"/> Debtor Education <small>Pro, Bobby</small>	COMPLETED May 12, 2017	3
<input checked="" type="checkbox"/> Get credit report <small>Janie Hernandez</small>	COMPLETED May 10, 2017	3
<input checked="" type="checkbox"/> Call customer <small>Janie Hernandez</small>	COMPLETED May 12, 2017	3
<input checked="" type="checkbox"/> Task 1 <small>Michael Watson</small>	COMPLETED May 12, 2017	3
<input checked="" type="checkbox"/> Task 2 <small>Michael Watson</small>	COMPLETED May 12, 2017	3



<input type="checkbox"/> task	NEW	3
<input checked="" type="checkbox"/> task 2	COMPLETED Jul 15, 2021	3
<input type="checkbox"/> 1st task	NEW	2
<input type="checkbox"/> 2nd task	NEW	3
<input type="checkbox"/> 341 Meeting	NEW	3
<input checked="" type="checkbox"/> Open physical File	COMPLETED Jun 17, 2021	2
<input type="checkbox"/> Send file to Intake	NEW	2
<input type="checkbox"/> Intake	NEW	2
<input type="checkbox"/> Attorney Review	NEW	2

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The screenshot displays the Jubilee software interface. At the top, there is a navigation bar with the Jubilee logo and various menu items: + New, View, Contacts, Cases, Calendar, and Notice Manager. The user is logged in as Carlos. The main content area shows a case for "John Jones and Jane Jones" (21-12345) in the U.S. Bankruptcy Court - Southern District of Texas. The "Docket" tab is active, and the "Claims Register" sub-tab is selected. A search bar for "Court Notices" is present, along with a "Category" dropdown set to "-- All --". Below the search bar is a pagination control showing "1" of 3 pages. A table lists court notices with columns for "Received", "Number", "Count", and "Text". The table contains 7 entries, with the first entry being "Order Resetting dismissal hearing on (Related document(s):[45] Chapter 13 Trustee's Motion to Dismiss Case) Hearing rescheduled for 3/11/2022 at 10:00 AM. (TraceyConrad)". At the bottom of the interface, there are summary statistics for the docket and claims.

Received	Number	Count	Text
2/14/2022 10:28:41 am	68	1	Order Resetting dismissal hearing on (Related document(s):[45] Chapter 13 Trustee's Motion to Dismiss Case) Hearing rescheduled for 3/11/2022 at 10:00 AM. (TraceyConrad)
2/14/2022 10:27:40 am	67	1	Order Resetting confirmation on (Related document(s):[58] Amended Chapter 13 Plan) Hearing rescheduled for 3/11/2022 at 10:00 AM. (TraceyConrad)
2/11/2022 11:56:13 am	66		Chapter 13 hearing terminated Hearing time on Confirmation is at 10:00 AM. (Related document(s):[8] Chapter 13 Meeting of Creditors (batch)) (Heitkamp, William)
2/10/2022 5:07:15 pm	65		Declaration for Electronic Filing and Statement of Social Security Number Filed. Does this document change the social security number for one or more debtors? No. Has the Meeting of Creditors been set in this case? Yes. (SierraThomasAnderson)
2/3/2022 11:33:43 pm	64	1	BNC Certificate of Mailing. (Related document(s):[62] Order Employer To Pay Trustee) No. of Notices: 1. Notice Date 02/03/2022. (Admin.)
2/2/2022 11:07:09 am	63	1	Creditor Request for Notices (Filed By Accelerated Inventory Mgt, LLC). (Bass, Patti)

Summary statistics at the bottom of the interface:

Latest Docket Number	Latest Docket Entry On	Latest Claim Number	Latest Claim On
68	02/14/2022	17	02/15/2022

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The screenshot displays the Jubilee software interface. The top navigation bar includes 'Jubilee' logo, '+ New', 'View', 'Contacts', 'Cases', 'Calendar', 'Notice Manager', 'Help', and a user profile 'Hello, Carlos!'. The main content area shows a case for 'John Jones and Jane Jones' (21-12345) in the 'U.S. Bankruptcy Court - Southern District of Texas'. The 'Claims Register' is active, showing a search bar for 'Proofs of Claim' and a table of entries. The table has columns for 'Received', 'Number', 'Count', 'Creditor', 'Claim', 'Secured', 'Priority', and 'Unsecured'. The bottom summary bar shows 'Latest Docket Number 68' and 'Latest Docket Entry On 02/14/2022' on the left, and 'Latest Claim Number 17' and 'Latest Claim On 02/15/2022' on the right.

Received	Number	Count	Creditor	Claim	Secured	Priority	Unsecured
2/15/2022 4:33:11 pm	17	3	Directv, LLC	\$855.51	\$0.00	\$0.00	\$855.51
2/14/2022 8:35:31 am	15*	1	LVNV Funding, LLC	\$949.63	\$0.00	\$0.00	\$949.63
2/10/2022 12:11:40 pm	16	1	National Credit Adjusters, LLC	\$519.22	\$0.00	\$0.00	\$519.22
2/10/2022 10:15:48 am	15	1	LVNV Funding, LLC	\$949.63	\$0.00	\$0.00	\$949.63
Total for Case				\$51,560.07	\$14,681.79	\$0.00	\$36,878.28
				Claimed	Secured	Priority	Unsecured

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The screenshot displays the Jubilee software interface. At the top, there is a navigation bar with the Jubilee logo, a '+ New' button, a 'View' dropdown, and several menu items: 'Contacts', 'Cases', 'Calendar', and 'Notice Manager'. On the right side of the top bar, there are icons for help, a notification bell with '10', and a user profile for 'Hello, Carlos!'. Below the top bar, there is a 'Dashboard' and 'Calendar' tab. The main content area shows a calendar for February 2022. The calendar is viewed in a 'month' view, showing days from Sunday to Saturday. Events are listed for each day, with some days having multiple events. For example, on Monday, February 7th, there are two events: '9a Willie Holman' and '9a NEF: 19-36685'. On Tuesday, February 8th, there are three events: '9a NEF: 19-36685', '9a NEF: 18-2311', and '10a NEF: 18-2311'. The calendar also shows a search bar and a 'Filters' section on the left side. The 'Filters' section includes a 'Calendars' list with checkboxes for 'Select/Deselect All', 'Hearing Calendar', 'Seville', 'Evonne', and 'Office'.

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The screenshot displays the Jubilee web application interface. The top navigation bar includes the Jubilee logo, a '+ New' button, a 'View' dropdown, and links for 'Contacts', 'Cases', 'Calendar', and 'Notice Manager'. The user's name 'Hello, Carlos!' is visible in the top right corner. The main content area is titled 'Cervantes, Stephanie' and shows a 'Filed' document for 'Evonne' in a 'Bankruptcy Case | Individual | Chapter 13 | Southern District of Texas - McAllen Division'. The left sidebar contains a 'MANAGE' section with various document categories, including 'DOCUMENTS' which is highlighted. The main area shows a list of documents with columns for 'Title/FileName', 'File Size', and 'Saved On'. The list includes items like 'AAAPetition-2', 'BCR1', 'Certificate of Credit Counseling.pdf', and 'Chapter 13 Plan as of 10/14/2021'. A search bar and a 'Filters' section are also visible.

Title/FileName	File Size	Saved On
AAAPetition-2 AAAPetition-2.pdf	675 KB	10/8/2021 6:13:24 pm
BCR1 BCR1(1).PDF	980 KB	10/8/2021 6:13:26 pm
Certificate of Credit Counseling.pdf	69 KB	1/13/2021 10:17:41 am
Chapter 13 Plan as of 10/14/2021 Chapter13Plan.pdf	90 KB	10/14/2021 2:15:40 pm
Chapter 13 Plan as of 10/14/2021 Chapter13Plan(1).pdf	90 KB	10/14/2021 2:20:02 pm

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The screenshot displays the Jubilee software interface for a bankruptcy case. The top navigation bar includes 'Jubilee', '+ New', 'View', 'Contacts', 'Cases', 'Calendar', and 'Notice Manager'. The user is logged in as 'Hello, Carlos!'. The main content area shows the case details for 'Cervantes, Stephanie' (Debtor 1) in a Chapter 13 bankruptcy case filed in the Southern District of Texas - Mcallen Division. The 'Overview' section provides a summary of assets, creditors, and budget. The 'Case Parties' section lists Stephanie Cervantes, Joe Attorney, and Evonne Espinosa. The 'Notes' section shows two court notices, and the 'Tasks' section shows a status breakdown. The 'Dates' section shows key dates like 'Filed On' and '341 Hearing'.

Assets (3)	Value	Creditors (3)	Value	Budget	Value
Real (1)	\$150,000.00	Secured (3)	\$140,000.00	Income	\$1,500.00
Personal (2)	\$650.00	Priority (0)	\$0.00	Expenses	\$0.00
		Unsecured (0)	\$0.00	Net	\$1,500.00

Status	Count
Completed	6
In Progress	0
N/A	0
New	15
Past Due	6
Not Completed	15

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The screenshot shows the Jubilee software interface for a bankruptcy case. The main content area displays the 'Form 122 Means Test' for 'Cervantes, Stephanie' in a 'Bankruptcy Case | Individual | Chapter 13 | Southern District of Texas - McAllen Division'. The interface includes a top navigation bar with 'Jubilee' logo and various menu items like 'New', 'View', 'Contacts', 'Cases', 'Calendar', and 'Notice Manager'. A left sidebar contains a navigation menu with categories like 'OVERVIEW', 'BUILD', 'ASSOCIATED PARTIES', 'PETITION', 'MEANS TEST', 'SOFA', 'PLAN MANAGER', 'TOOLS', 'CASE FORMS', 'ELECTRONIC FILING', 'MANAGE', 'NOTES', 'TIME & BILLING', and 'COURT NOTICES'. The main content area displays the 'Form 122 Means Test' with tabs for 'Details', 'Current Monthly Income', and 'Calculation of Disposable Income'. The 'Current Monthly Income' tab is active, showing a table of income types and amounts for 'Cervantes, Stephanie (debtor 1)'. The table lists various income sources and their corresponding amounts. At the bottom, there is a summary showing 'Current Annual Income \$6,000.00' and 'Median Income \$70,418.00', along with buttons for 'VIEW CALCULATION' and 'VIEW ALLOWANCES'.

Type of Income	Amount
Gross Employment Income ⓘ	\$0.00
Alimony and Maintenance Payments ⓘ	\$0.00
Regular Contributions to Household ⓘ	\$0.00
Business Income ⓘ	\$500.00
Net Income from Rental and Other Real Property ⓘ	\$0.00
Interest, Dividends and Royalties Income ⓘ	\$0.00
Unemployment compensation ⓘ	\$0.00
Pension or Retirement Income ⓘ	\$0.00

Summary: Current Annual Income \$6,000.00, Median Income \$70,418.00

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The screenshot shows the Jubilee Exemptions Calculator interface. The top navigation bar includes the Jubilee logo, a '+ New' button, a 'View' dropdown, and links for 'Contacts', 'Cases', 'Calendar', and 'Notice Manager'. The user is logged in as 'Hello, Carlos!'. The main header shows the case details: 'Cervantes, Stephanie | Filed Evonne', 'Bankruptcy Case | Individual | Chapter 13 | Southern District of Texas - Mcallen Division', and a timer '00:04:48'. The left sidebar contains a menu with categories: OVERVIEW, BUILD, ASSOCIATED PARTIES, PETITION, MEANS TEST, SOFA, PLAN MANAGER, TOOLS, EXEMPTION CALCULATOR (highlighted), MAIN STREET VENDORS, CASE SETTINGS, CASE FORMS, and ELECTRONIC FILING. The main content area is titled 'Exemptions Calculator' and has tabs for 'Summary', 'State Exemptions Applied', and 'Federal Exemptions Applied'. The 'Summary' tab is active, showing a 'Gross Asset Total' of \$150,650.00 and a 'Net Equity to Exempt' of \$10,650.00. The 'State Exemptions' section is checked, showing a 'Total Amount Exempted' of \$10,600.00 and a 'Non-Exempt' amount of \$50.00. The 'Federal Exemptions' section is unchecked, showing a 'Total Amount Exempted' of \$10,000.00 and a 'Non-Exempt' amount of \$650.00. A 'Wildcard Applied' section shows a limit of \$13,900.00 and an available amount of \$13,900.00. The interface is clean and professional, with a blue and white color scheme.

Jubilee Challenges: Putting Jubilee into Practice

- Templates
- Workflows
- Setting up a Matter
- Setting up Contacts
- Firm defined lists
- Filing a Case
- Integrations

Jubilee Integrations



What's new with Jubilee

- Jubilee CreditVista™
- Updated Billing Plans
- eSignature



Carlos Sarmiento ◦

- Sr Software Developer
- Joined Legal-Pro in 2012
- Head of Development for Jubilee

Jubilee CreditVista™

Same Credit Data – Much Better Prices!

- Client Self-Service Portal
- Full Integration into Jubilee Case File
- Consumer Pay or Attorney Pay
- Better Pricing for 3B Report
- Consumer gets 3 months of Credit Monitoring, Alerts and Scores



Updated Billing Plans

- Recurring Client Payments
- Securing store payment information in our data vault
- Increase Cashflow with Payment Plans
- Flexible “end” options:
Dollar amount, date or number of approved transactions.

Client
Bubba Smith

Payment Amount
\$ 10.00 **ACTIVE**

Associate with Case
Smith, Bubba; Smith, Suzie Client ✕

Repeats
Every Month **Next Payment On**
02/19/2022

Description
Attorney Meeting \$125

End Billing Plan
Total Amount Paid \$ 1,500.00

Payment Schedule:
Every month on the 19th

Modify Schedule **Pause Payments** **Cancel Schedule**

Total Paid in Plan \$0.00 **Successful Transactions** 0 **Next Payment On** 02/19/2022 **Last Payment On** N/A

eSignature

- Securely send case forms or *custom* documents for e-signature
- ESIGN and UETA compliant for legally binding documents
- Signed documents are automatically stored in Jubilee case folder

The screenshot shows the 'New Document Signing Request' interface in signNow. At the top, there is a header with a hamburger menu icon, the title 'New Document Signing Request', a 'NOT SENT' status indicator, and the signNow logo. Below the header is a blue banner with an information icon and the text 'Send out documents to be securely reviewed and signed through the SignNow Client Portal.' The main content area includes a 'Request Name' field containing 'Document Signing Request'. There are two sections for selecting documents: 'ECF Events' with checkboxes for 'Petition', 'Chapter 13 Plan', and 'Statement of Social Security'; and 'Individual Forms' with a dropdown menu currently showing 'Official Form'. Below these is an 'Upload Additional Documents' section with 'UPLOAD' and 'GENERATE E-SIGN CODE' buttons. At the bottom, there are 'Save & Review Send Details' and 'Close' buttons, and a checkbox labeled 'Send Forms for Client Review' which is checked.

Powered By **signNow**

Ask the Experts





Next Webinar: March 16, 2022
“Exploring Workflows”