

Adding A PDF Attachment

What is a PDF Attachment?

When filing electronically, Best Case allows you to insert a previously created PDF file into the PETITION.PDF file created by Best Case. You would create a PDF attachment for:

- A PDF document previously created from a different application.
- A scanned document, such as a pay stub or legal property description.


Note that PDF Attachments are for Electronic Filing ONLY. Your PDF attachment will only be included in the PDF you create using electronic filing. If you try to print directly to the printer or through the print preview, Best Case will simply print a reminder that a PDF is attached to the form. For more information on attachments, please refer to the What is an Attachment in Best Case Bankruptcy topic.

Adding a PDF Attachment

1. **Select a form:** You first need to select your main document. From the Forms and Schedules Menu, highlight the document you would like to add an attachment to then click the **Attach** button at the bottom of the window, or press [Alt]-[t].
2. **Add a PDF File:** The attachments list screen appears. Click **Insert** and select **Existing PDF File** to add a new PDF file.
3. A screen appears asking you to select a PDF file from your hard drive or network. Double-click on the file or select a file and click **Open** (You can select multiple files using [Ctrl]-click or [Shift]-click).
4. The **Add Attachment** screen appears with common answers marked:


The **Name** is the title you will use to refer to this PDF file. The default name is the filename and path of the PDF.

The **Attached to Form** button allows you to choose which form you want this PDF file to be attached to.

When does this document print? Your choices here are Before Form, After Form, Replaces Form and Do Not Print. The first three options determine where your attached PDF file is printed in relation to the form, and After Form is the most common choice. When creating an attachment, you generally would not want to use the Replaces Form choice, as this would replace the main document with the attachment. The PDF Filename is the drive, path, & filename of the document (e.g. N:\test_files\sample PDFS\sample1.pdf). You can click the  button to select a different PDF or click **View** to open this document in Adobe Acrobat. Click **OK** to add the PDF file to the document.

5. The PDF file will now appear in the attachments list screen. Click **Close** to exit the list of attachments.
6. Back in the Forms and Schedules Menu, you'll notice that a paperclip appears on top of the form icon next to your document, indicating that there is an attachment.
7. Mark form to print, click **Print**, and then click the **ECFiling** button. The PDF Attachment will be included in the PETITION.PDF file (or PLAN.PDF if attached to a Chapter 13 plan) created during this process.

Reordering PDF Attachments (Standard or PDF)

To reorder an attachment in the attachment list, highlight it and click  to move up or  to move down. You may then want to edit the print titles of the attachments to reflect the new order.

Changing Attachment Options

Choices in the Attachment Options screen allow you to change the name of an attachment, the document it is attached to, where and if the attachment prints, and whether the attachment is included in the page count on the Summary of Schedules.

To access these options, from the Forms and Schedules Menu, highlight the document your attachment is associated with and click the **Attach** button in the bottom left corner. Highlight the attachment name and click the **Options** button. The options window appears. The options on this screen are described in the section Adding PDF Attachments above, under step 4.

If this attachment is attached to a Schedule A-H and you check the box labeled "Omit from Page Count," the attachment will not be included in the number of pages. Otherwise, it will be included.

Printing PDF Files

PDF Attachments are not printed through Best Case, but are included in the PETITION .PDF file you create when using the **ECFiling** button in the Print Documents dialog box. After creating files for electronic filing, you can print a hard copy by opening the ECF Manager, viewing a file in Acrobat, and then printing from there. If you try to print directly to the printer or through the print preview, Best Case will simply print a reminder that a PDF is attached to the form.

Replacing a Form with a PDF Attachment You Create

For a particular client, the attachment feature can be used to replace the standard version of a form with a PDF file created in another application.

To create an attachment that replaces a form:

1. Create an attachment using the steps outlined in Adding PDF Attachments above. When you get to step 4, choose "Replaces Form" in the Attachment Options dialog box.
2. Back in the Forms and Schedules Menu, you'll see that the word "Replaced" appears in brackets in front of the form name.

If you double-click on the document from the Forms and Schedules Menu, you will get the Attachments window instead of the entry screen for this form. The top of the Attachments window will contain a message that says "The normally generated document has been replaced by an attachment."

This window and message are to warn you that changes you make in the entry screen for the form will not be reflected in your attachment, which has already been saved. If you want to access the entry screen for the form anyway, you can either click the **Options** button and change where the document prints from "Replaces Form" to "After Form," or you can delete the attachment.