

Adding a Standard Attachment

What is a Standard Attachment?

A Standard Attachment is a separate document that lists additional information not captured in the main form or schedule. At the top of each attachment, the form title, the debtor's name, and the attachment print title (e.g. "Attachment A") appear. Standard Attachments are included when printing forms from the Forms and Schedules menu. Attachments are not the same as *continuation sheets*, which Best Case Bankruptcy adds for you automatically when you add a lot of items to Schedules A-H. Attachments are specifically utilized for additional information not captured in the form; for example:

- Additional Pages or information that could not fit on a Schedule, such as numerous "other" expenses on Schedule J, a lengthy property description on Schedule D, or an explanation for an unusual or confusing answer
- Separate Documents you authored with the Best Case Editor.

For more information on attachments, please refer to the What is an Attachment in Best Case Bankruptcy topic.

Adding Standard Attachments

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 an Attachment:** The attachments list screen appears. Click **Insert** and select **Standard Attachment** to add a new attachment.
3. The attachment appears in the Best Case Editor, a built-in word processor in Best Case Bankruptcy. Notice that the caption, title of the main form, and title for the attachment (Attachment A, B etc.) have been inserted for you. You can change these by typing over them if you want.
4. **Type your text:** For detailed instructions on using the various formatting tools available in the Best Case Editor, refer to the Best Case Editor help topic.
5. **Save your document:** When you are ready, click File/Save to save this attachment. The Save dialog box appears with common answers marked:

The **Name** is the title you will use to refer to this document, and does not actually print on the form. It defaults to Attachment A for the first attachment you create for this form, Attachment B for the second, etc.



The **Attached to Form** Drop-down list allows you to choose which form you want this standard attachment 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 standard attachment 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. Click **Save to Case** to save the document.

6. After saving, click File/Exit to close the Best Case Editor, and click **Close** to exit the list of attachments.
7. 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

Editing and Reordering Standard Attachments

To make changes to an attachment that you have already created, go to the Forms and Schedules Menu, highlight your document, and click the **Attach** button. The list screen appears containing all attachments that you have created for this document. Highlight your Standard Attachment and click **Edit**. The document will appear in the Best Case Editor. Make your changes then click File/Save to save them. Click File/Exit to close the Editor.

Reordering an attachment (Standard or PDF): To reorder an attachment in the 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 first three options on this screen are described in the section Adding Standard Attachments above, under step 5, as they are the same options that appeared in the Save dialog box.

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 Standard Attachments

When you print your main document from the Forms and Schedules Menu, the attachment will print with it unless you have checked the "Do Not Print" box mentioned above. You can also print the attachment from the attachments list screen: From the Forms and Schedules Menu, highlight the main document and click **Attach**. Then, highlight your attachment and click the **Print** button.

Replacing a Form with an Attachment You Create

For a particular client, the attachment feature can be used to replace the standard version of a form with a version that you have edited in the Best Case Editor. The most common application of this feature would be for a Chapter 13 Plan, which often needs to be customized for each case. Using attachments, you can open the Chapter 13 Plan in the Best Case Editor, then save it as an attachment that actually replaces the form produced by Best Case Bankruptcy. Then, when you print forms or create documents for electronic filing, you will get the edited version of the 13 plan instead of the regular version.

Note that this replace option is on a **case-by-case** basis only. Replacing a form DOES NOT make permanent changes to the form for other cases. It simply replaces the form that is automatically generated by Best Case Bankruptcy with one edited by you for this particular case.

To create an attachment that replaces a form:

1. Enter all information that you can through the entry screen for that form. If this is a Chapter 13 Plan, make sure you have finished inputting information regarding creditors and the plan and have calculated a workable repayment plan. *After replacing the main document using the steps below, you won't be able to get back to the entry screen for the form, so you will want to make sure you have made your changes in entry screens **before** replacing the form.*
2. Create an attachment using the steps outlined in Adding Standard Attachments above or edit an existing document from the Forms and Schedules menu in the Best Case editor by right-clicking on the document and choosing **Edit Form**. When you get to step 5, choose "Replaces Form" in the Save dialog box. Click File/Exit to exit the Best Case Editor.

3. Back in the Forms and Schedules Menu, you'll see that the word "Replaced" appears in brackets in front of the form name as pictured below. When you print this document, you will get the version that you edited through the Best Case Editor.

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 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, edit the entry screen, then create a new attachment from scratch which will replace the main document.