

## BEST CASE® BANKRUPTCY Advanced Topics

This educational guide provides you an in-depth look at practical solutions and workflow tools in Best Case Bankruptcy. Get an inside look into advanced features and functions with helpful screen shots, step-by-step instructions and tips.



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# Client and Case Management

## Set Up Similar Client Files in Less Time

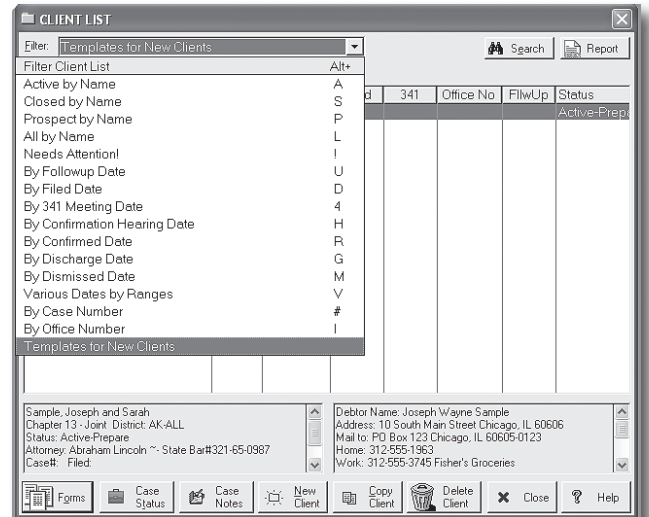
### Create Client Templates

The Client Templates feature allows users to create new client files with similar standard information pre-populated. There is no limit to the number of templates you can create.

To create a Client Template:

1. Open the **Client List**, click on the Filter drop-down and select **Templates for New Clients**.
2. Click the **New Client** button located at the bottom of the **Client List** and enter information.
3. Click **OK**.
4. Double-click the template file you created to further customize forms and schedules.
5. To create a client file, click **New Client** and select the template you wish to use.

**Note:** Changes you make to a new file will not affect the template, and changes you make to the template won't affect an existing client file.



Create a Client Template to make quick work of setting up a new client file.

## Track and Manage Clients More Effectively

### Create Custom User-Defined Fields

There are four types of fields available for customization depending on your needs. Choose from:

- Text fields
- Amount fields
- Date fields
- Check box fields

To access User-Defined fields:

1. Open a client file and click the **Notes** button on the toolbar
2. Select the tab labeled **User Defined 1**
3. Click **Edit Field Prompts** to create a name for the field
4. Select the appropriate field type from the 4 choices above
5. Enter the new field name into the **Field Prompt Text** box

**TIP**

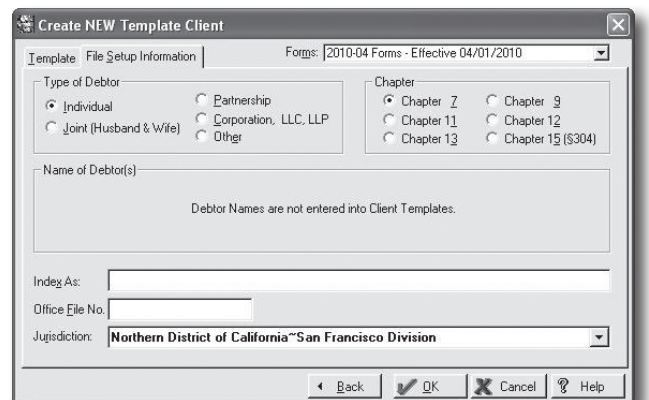
The **Field Tip Text** box produces text that appears when a Best Case user's mouse hovers over the field.

**Note:** To remove unused User-Defined Fields enter a tilde (~) in the Field Prompt Text box.

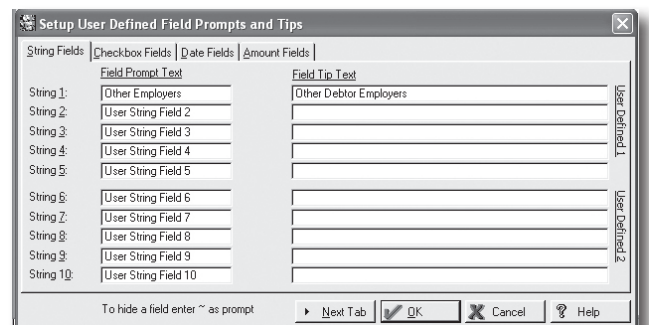
### Add Detailed Notes to a Client File

To insert a more comprehensive note or reminder:

1. Open a client file and click the **Notes** button
2. Click **Insert** and the Notes Form dialog box opens
3. Enter a **Subject** and **User Name**
4. Type a message in the **Notes** window and click **OK**



Enter basic information that is common among clients in the Create NEW Template Client window and click OK.



When defining fields, enter a description in the **Field Tip Text** box and the description will appear when you roll your mouse over the field.

# Client and Case Management

## Keep Track of Case Events

### Important Dates Tab

Based on the debtor's expected filing date, Best Case generates a list of important events and their corresponding deadline dates, including:

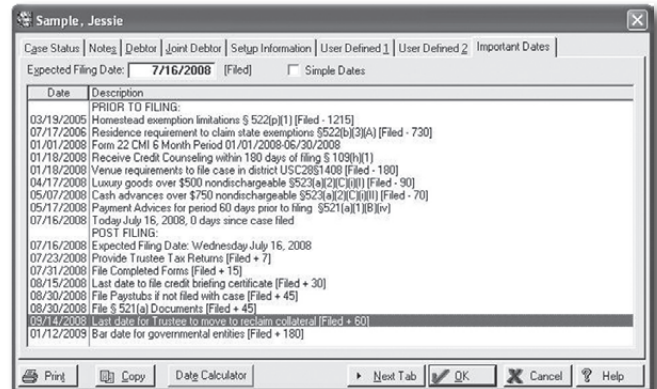
- The first available date for Credit Counseling (180 days before the filing)
- The period for payment advices (60 days prior to the filing)
- The last day to provide tax returns to the U.S. Trustee (7 days after filing)
- The last day for the U.S. Trustee to file a motion to dismiss for abuse (30 days after filing)
- And much more

### Send Dates to Calendar

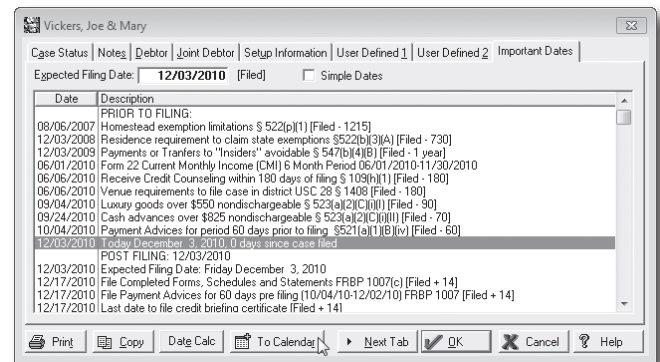
You can export important dates from Best Case to Outlook or other iCalendar-compatible software to help keep you current with upcoming case events.

1. Choose dates to export from the **Case Status**, **User Defined** or **Important Dates** tabs
2. Select the **To Calendar** button at the bottom of the window
3. Check the events you want to export
4. Click **Send to Calendar** at the bottom of the window

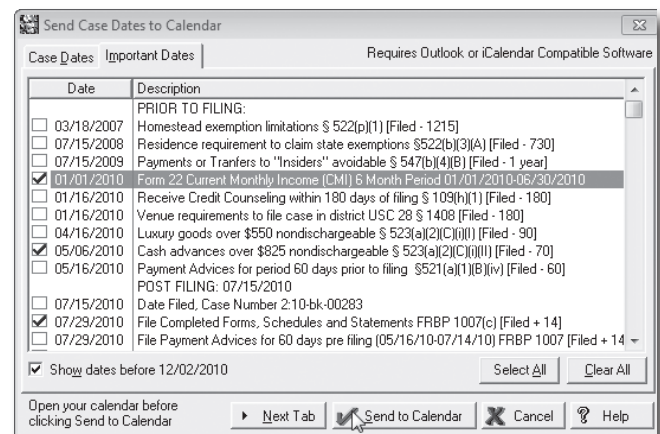
**Note:** For Send to Calendar to work properly, Outlook or iCalendar must be open and running. You may be prompted to link your external calendar to Best Case on your first Send to Calendar export.



Deadline dates help you identify critical upcoming events and required documents.



Selecting Important Dates to export begins with just a couple clicks in the **Case Status**, **User Defined** or **Important Dates** tabs.



Once you check the dates to export, one click sends the dates to Outlook or your iCalendar-compatible calendar.

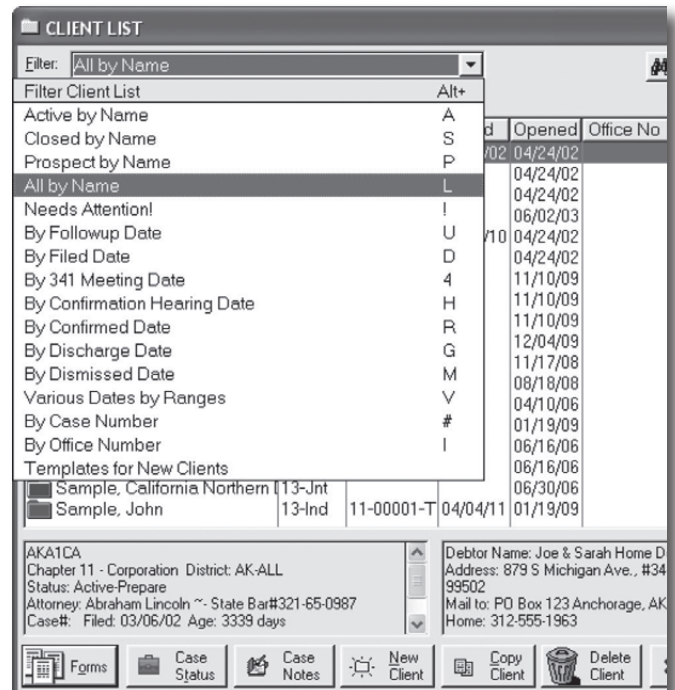
# Client and Case Management

## Client Filtering and Reporting

### Filtering Client Files

A drop-down filter menu can be used to filter cases according to specific information which is entered into the Notes window of each Client. Select one of the following to display:

- **Active:** Cases with a status set to Active
- **Closed:** Cases with a status set to Closed
- **Prospect:** Cases with a status set to Prospective Client
- **All:** All cases
- **Needs Attention!:** Clients with the Needs Attention checkbox checked
- **Follow-up Date:** Cases with a Next Follow-up date entered
- **File Date:** All clients with a Date Filed entered
- **341 Meeting Date:** All clients with a 341 date entered
- **Confirmation Hearing Date:** Clients with a date entered in the Date Confirm Hearing field
- **Confirmed Date:** Clients with a date entered in the Date Plan Confirmed field
- **Discharge Date:** Clients with a date entered in the Date Discharged field
- **Dismissed Date:** Clients with a date entered in the Date Dismissed field
- **Various Dates by Ranges:** Filter clients by a date range
- **Case Number:** All clients with a Case Number entered in the Case Status Tab
- **Office Number:** All clients with an Office Number on the File Setup Information Tab
- **Templates for New Clients:** Lists all current Client Templates



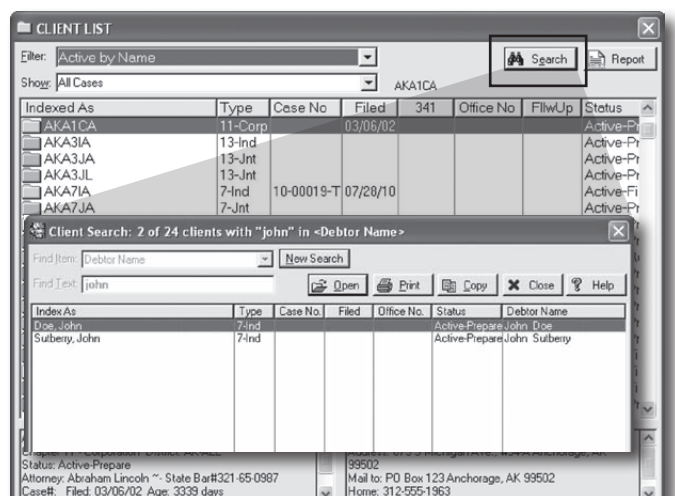
Select a filter drop down to display only certain client files.

### Search Files within the Client List

Use the Search button in the top right corner of the Client List window to search the entire Client List. Categories include:

- Index
- Debtor Name
- SSN
- Address
- Phone
- Email
- Employer
- Case Number
- File Number
- Attorney Name
- Paralegal
- Referred By
- Comment
- Disk File Name

1. Select a drop down search category from **Find Item**
2. Enter your desired search criteria in the **Find Text** field and click **Search**.
3. The client(s) that match your criteria are displayed. In this window you are able to open the client file, print or copy the results list, start a new search or close the window.



Select the category, enter text to locate, and click Search.

# Client and Case Management

## Search for Files within a Filtered Client List

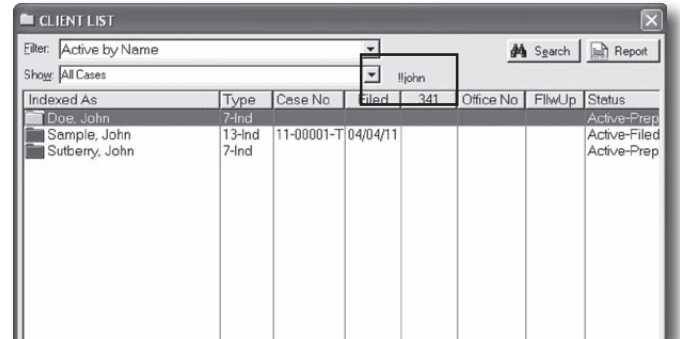
Refine a filtered list one step further by searching for a particular client name or office file number.

1. Open the Client List window and filter by name
2. Type two exclamation points !! and then type the name you want to find

**Note:** Do not enter a space after the exclamation points

3. You'll see the text you typed at the top of the Client List window, next to the Filter field
4. As you type, your Client List will be filtered to include the files that meet your search criteria

**Note:** Use this search method in: All Clients, Active Clients, Closed Clients, and Prospective Clients.

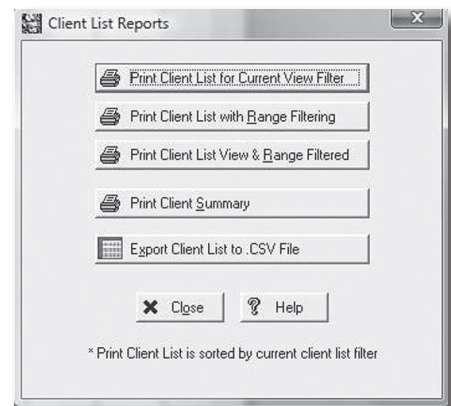


When your Client List is filtered, you can further refine your search with a partial or full name.

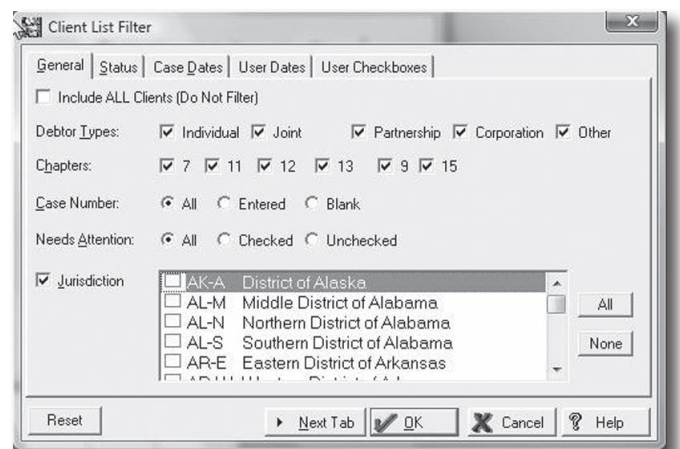
## Create a Client List Report

From the Client List window, you are able to generate a report based on various criteria and filters.

1. Click **Report** in the upper right-hand corner of the Client List window
2. Choose from the following options:
  - **Print Client List for Current View Filter:** Displays all debtors in your current filtered Client List window
  - **Print Client List for Range Filtering:** Displays client files based on a range of criteria including Debtor Type, Chapter, Case Number, Needs Attention, Jurisdiction, Case Status
  - **Print Client List and Range Filtered:** Displays all debtors in your current filtered Client List window and specific filtered criteria
  - **Print Client Summary:** Displays a yearly summary of cases by Total Cases, Active, Closed, Preparing to File, Ready to File, Filed/Pre 341, Post 341, Pre Confirmation, In Plan, Discharged, Dismissed, Inactive, Chapter 7, 9, 11, 12, 13 and 15, Individual, Joint, Partnership, Corporation, or Other type.
  - **Export Client List to .CSV File:** Prepares a file with all clients or specific clients based on your filtered criteria.



Customized reporting features allow you to export your client list with various criteria.



Client List Filters help narrow down your client list to specific cases; choose to include all clients or various filters.

# Workflow Efficiency Tools – Credit Report Import

## Download Electronic Credit Reports into Best Case

The Best Case Credit Report Import feature provides an easy, convenient, and fast way to enter claims directly on the creditor schedules without leaving Best Case. All electronic credit reports contain creditor names, addresses, account numbers and more.

### Order a Credit Report

1. Open a client file
2. Select **Credit Report** from the top menu bar or from the Tools drop-down menu
3. Select **Credit Reports for this Client**
4. The **Credit Report Order Wizard** prompts you to order

### Authenticate a Client

1. Click **Authenticate**
2. A web page will load with a short series of multiple choice questions which only your debtor can answer
3. If your debtor's identity has already been authenticated, select **Already Authenticated**

### Download Credit Reports

1. Select **Download Reports**
2. The report downloads and is ready to be imported into Best Case

### Import into Best Case

1. Select **Import Reports to Best Case**
2. Choose to import all debts to Schedule F or select a schedule for each debt
3. To import all debts to Schedule F, click the **Tag All as Sch F** button at the top of the window, then click the **Import to Client** button
4. To select a schedule for each debt, highlight a creditor record and press D, E, F or G on your keyboard or use the **Sch D**, **Sch E**, **Sch F** or **Sch G** button at the top of the window

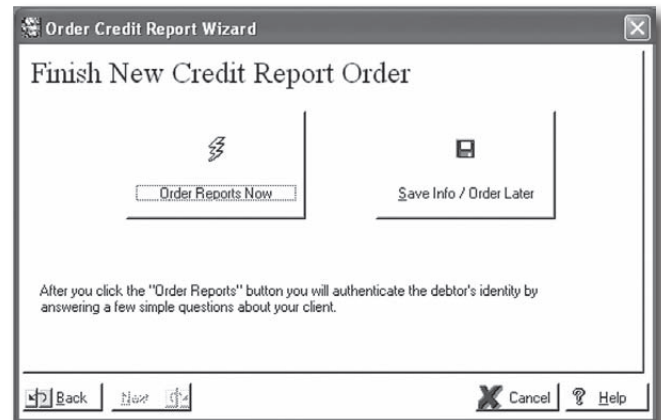
**Note:** For Schedule E claims, you'll need to select the type of priority for each debt

5. Select the appropriate schedule for each creditor
6. Click **Import to Client** when you have marked each record that you want to import

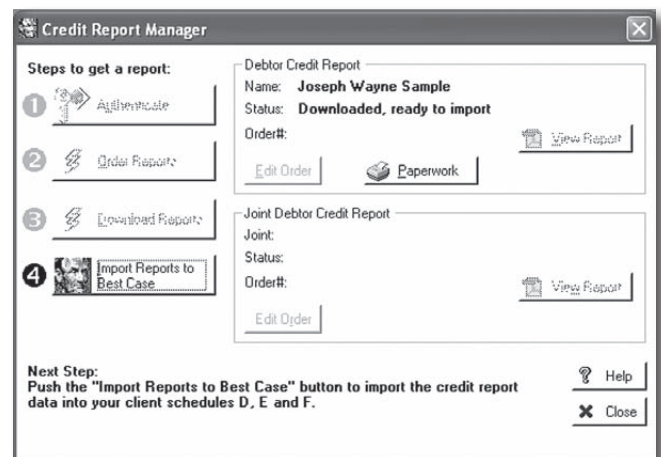
### To Get Started

Set up an account with one or all three of our credit report partners:

- |                           |              |                                 |
|---------------------------|--------------|---------------------------------|
| ■ A Suite Solution        | 877.311.1234 | www.asuitesolution.com          |
| ■ CIN Legal Data Services | 866.218.1003 | www.cinlegal.com                |
| ■ CoreLogic® Credco       | 877.213.6520 | www.corelogiclegal.com/software |



Click **Order Reports Now**, and you are ready to authenticate the debtor.



Click **Import Reports to Best Case** to transfer data to Schedules.

### TIP

To omit claims that have been paid and have a \$0.00 balance OR to show claims with only an open status, check the appropriate box in the lower left corner.

# Workflow Efficiency Tools – MyCaseInfo® 2.0

## Streamline the Initial Data Collection and Entry Process

Available for Chapter 7 and Chapter 13 consumer cases, MyCaseInfo helps you collect bankruptcy-specific information from clients with a web-based questionnaire. It allows you to preview the clients' responses and download the data into Best Case.

### How to Access MyCaseInfo

1. Select MyCaseInfo from the Tools drop-down menu
2. Select **Attorney Administration** site

### Invite a New Client

1. Select the **Invite a Client** button in the left side bar
2. Complete basic information and choose what questionnaire sections you want your client to complete including Debts, Expenses and more
3. Click **Send**. An email is sent inviting your client

### Client Experience

Once your client logs in, they get detailed instructions and access to helpful tools and videos. Questions are formulated to be simple and easy to understand. When completed, an email will be sent notifying you that your client has completed the questionnaire.

### Preview and Download the Case Data

1. Go to the **Attorney Administration** site and find the client
2. Preview all client-entered data
3. To download, click **Purchase**
4. Save the file to your desktop

### Import into Best Case (New Client)

1. In Best Case click **New**
2. Click **Import** to download and create a new client file

### Import into an Existing Client File

1. In Best Case, open the client file and click **Tools/MyCaseInfo/Import MyCaseInfo into currently open client file**
2. Browse to the MyCaseInfo file and click **Open**
3. Eight check boxes allow you to select what information you would like to include or exclude from the download
4. Click **Import** to download the data into the existing client file

### To Get Started

1. Complete the Online Request Form at [www.bestcase.com/mycaseinfo/signup](http://www.bestcase.com/mycaseinfo/signup)
2. Invite as many clients as you want but only pay for the **downloaded client files**
3. You're billed **\$6 per import** in one monthly payment

First Import is FREE

MyCaseInfo  
Law Office of Lawrence Doe  
Lawrence Doe  
789 West Street  
Chicago, IL 60606  
Phone: 800-452-8027  
Fax: 847-452-8028  
info@bestcase.com  
www.bestcase.com  
Account Administration | Logout

Invite a Client

\* Required Fields  
 CC Attorney: johnson@samplefirm.com

\* Full Name: \_\_\_\_\_  
\* Phone: \_\_\_\_\_  
Ext: 777-777-7777  
\* Email: \_\_\_\_\_  
\* Address: \_\_\_\_\_

Please select the sections of the questionnaire that you would like your client to complete

Questionnaire Sections:  Income  Property  Debts  Expenses  Miscellaneous

Select the set of instructions to use. Edit Instructions

Chapter 7  
 Chapter 13

Special Instructions: \_\_\_\_\_

Send Back

To invite a client to use MyCaseInfo, enter the instructions for the information you need and click **Invite New Client**.

MyCaseInfo  
Law Office of Lawrence Doe  
Lawrence Doe  
789 West Street  
Chicago, IL 60606  
Phone: 800-452-8027  
Fax: 847-452-8028  
info@bestcase.com  
www.bestcase.com  
Account Administration | Logout

Client Preview

Back Print Rebuild Purchase

Summary

Income Summary	Property Summary	Debts Summary
Weekly Income: \$150,000.00	Property: 1,242,767.25	Total Debts: 1,242,767.25
Employment Income: 50	Debtors: 1,078	Number of Creditors: 18
Business Income: 50,000.00	Number of Properties: 2	Secured Debts: 7,242,767.25
Other Income: 50	Total Real Estate Value: 1,242,767.25	Number of Secured Creditors: 7
	Debtors: 1,078	Other Debts: 50
	Number of Real Estate Holdings: 2	Number of Other Creditors: 9
	Other Property Value: 50	
	Number of Other Property Holdings: 0	

Name & Address

Full Name: Sally Smith  
Married Status: Married  
Address: 123 E. 7th Avenue  
City, St zip: Joplin, IL 62601  
Length of Time at address: 244  
Home Phone: 555-555-5555  
Best Contact: Email  
Farmer: No  
In Business: No

Review client progress at any time and preview all data entered for accuracy prior to purchasing and downloading.

Creating New Client File

File Setup Information  
Forms: 2008 Forms - Effective 01/01/2008

Type of Debtor:  Individual  Partnership  Corporation, LLC, LLP  Other (Husband & Wife)

Chapter:  Chapter 7  Chapter 9  Chapter 11  Chapter 12  Chapter 13 (S304)

Import

Tools Help Credit Report

Check for Update Ctrl+Shift+U  
Credit Report  
Due Diligence  
MyCaseInfo  
Best Case Training  
U.S. Courts Web Information  
Online Tools  
Utilities

Import MyCaseInfo into currently open client file

Simply click **Import** to download data into a new client file or only import specific sections into an existing client file.

# Additional Documents Library

## Create Custom Client Letters, Motions and More

You can produce custom documents for your Additional Documents Library, to easily generate custom motions, client letters, creditor letters, envelopes and more. Information entered in Best Case can be merged into a document in your word processing software to customize the piece.

Best Case comes with several Additional Documents, but it also gives you the option to build customized Additional Documents.

### Edit an Existing Additional Document

1. Highlight an existing document in the Additional Documents Library and press **Ctrl+E**
2. Select either Microsoft Word or Word Perfect
3. Click **Edit ADL**

**Note:** You will see several instances of text similar to {MERGEFIELD xxx}. This is where Best Case merges the unique information.

**Example:** {MERGEFIELD DateFiled} will load the date the case was filed. {MERGEFIELD DbtLastName} will load the debtor's last name.

4. Edit the body of the letter to use the existing merge fields
5. To overwrite the existing client letter, click **Save** and the next merge will include the changes

### Add as a New Additional Document

1. Under the File menu select **Save As** and rename the file.
2. When adding a new Additional Document, save the file in the BESTCASE\Adl\_ms\ folder. Give the document a new 8 letter name with the file extension of ".wfm". In the **Save As** screen, place quotation marks around the 8 letter file name and .wfm extension or MS Word will add its own file extension.
3. In the Additional Documents Library, click **Insert** to insert the new Additional Document. Enter in the 8 Letter File name (not including the .wfm extension) in the top right and select the data source.
4. Double click on the document to ensure information merges properly.

### Data Source and Merge Code Information

Best Case has a variety of information to choose from, based on the data source you select. Information such as the claim amount for a particular creditor, the case number, and more can be selected. Merge codes vary by the data source used, so please note the data source of the document from which you will base the new Additional Document.

### Data Source Notes

**Voluntary Petition Information:** Includes all debtor information listed on the Voluntary Petition, Attorney Compensation Statement, Application to Pay Filing Fee in Installments, and information from the Client Notes section for the open client file, as well as some information from Schedule I and the Chapter 13 Plan Calculator.

**Pick One Creditor:** Complete with Voluntary Petition Information, which contains the name and address of any creditor selected plus debtor information contained in the Voluntary Petition data type above.

**Pick Multiple Creditors, Contracts or Codebtors, Complete with Voluntary Petition:** Same field codes as the Pick One Creditor data type, but allows you to select more than one party from Schedule D, E, F, G or H and creates a separate letter or form for each party. It also allows you to choose any of the additional notice parties.

**All Creditors and Others on Master Mailing Matrix:** Name, address, and account number, which contains the names and addresses of all creditors in the case, along with any additional notice parties, without debtor information.

**All Creditors and Others on Master Mailing Matrix Complete with Voluntary Petition Information:** Provides the names and address of all creditors and additional notice parties, along with debtor information in the Voluntary Petition data type above.

**Client List Information:** For all clients, this data type gives information from the Client Notes section of the program and selected information from the Attorney Compensation Statement and the Chapter 13 Plan Calculator.

# Chapter 13 Plan Calculator

## Overview of calculating a Chapter 13 plan in Best Case

The Best Case Chapter 13 Plan Calculator helps you develop a workable plan; it performs various calculations including the minimum monthly payment needed to repay creditors or the number of months needed to repay creditors, and then displays how the funds will be distributed.

### Assign Classifications to Creditors

Each portion of each claim must be given a payment classification by the user.



Assign classifications in the **13 Plan Treatment Tab** in the creditor information entry screen for each claim.

### Commonly Used Plan Classifications

Selecting the appropriate classification is necessary for the Chapter 13 Plan Calculator to effectively calculate your plan.

- Secured Fixed Payment – Input the term and interest rate
- Secured Paid Prorata – Input the interest rate
- Secured Long-Term Inside Plan – Input the term and interest rate
- Secured Long-Term Outside Plan – Input the term and interest rate
- Arrearage Fixed Payment – Input the term and interest rate
- Arrearage Paid Prorata – Input the interest rate
- Unsecured General Non-Priority
- Unsecured Priority
- Unsecured, special class, paid 100%

### Calculating a Chapter 13 Plan

1. In the **Summary Tab**, insert a question mark into the payment field and declare the term of the plan in the corresponding term field
2. Click **Calculate** in the bottom left hand corner
3. Best Case calculates a feasible Chapter 13 Plan payment based on the criteria entered

Code	Classification	Total Claims	Total Payout	First	Last
ATTY	Attorney Fees	1,150.00	1,150.00	1	1
FILE	Filing Fees	1,500.00	1,500.00	1	1
ARPR	Arrearage, paid prorata	542.00	542.00	1	60
SPR	Secured, paid prorata	248,540.00	248,540.00	1	60
UGEN	Unsecured General Nonpriority	56,217.98	1,686.76	60	60
UPR	Unsecured, priority	1,530.00	1,530.00	60	60
DSD	Domestic Support Obligation §507(a)(1)(A)	0.00	0.00	60	60
NOT	Not In Plan	16,594.31	0.00	60	60

Regular and Lumpsum Payments into Plan

Payment **5,000.00** # of months **36**

Payment **4,000.00** # of months **12**

Payment **?** # of months **12**

Lumpsum \_\_\_\_\_ in month # \_\_\_\_\_

Lumpsum \_\_\_\_\_ in month # \_\_\_\_\_

Lumpsum \_\_\_\_\_ in month # \_\_\_\_\_

Summary Totals

Attorney & Filing Fee **2,650.00**

Trustee's Fee **28,327.68**

Principal to Creditors **252,298.76**

Interest to Creditors **0.00**

Over Payments **0.00**

Total Plan Payments **283,276.44**

Plan needs calculation

60 month plan 3% for unsecured, non-priority

Enter lump sum payments then calculate in the **Summary Tab**.

### Calculating a Step Plan

1. Enter the monthly payment amounts for each step, along with the number of months
2. Type a question mark for the number of months or payment of the last step
3. Click **Calculate**
4. A possible payment plan is calculated for the remaining step of the plan

### Additional Chapter 13 Tabs:

**Claims Tab:** Lists each claim, the 13 Plan Classification, payment ranking, beginning and ending months, total amount to be paid, interest accumulated, and total claim amount.

**Payout Tab:** Lists each individual payment to a particular creditor throughout the life of the plan organized by month

**Liquidation:** Estimates a scenario for filing a Chapter 7 case

**Split Claim:** Itemizes any split claims for the 13 Plan

**Wage:** Enter wage deductions for your debtor and joint debtor

**Limits:** Compares the totals for the case with the limits from 11 USC § 109(e)

# Workflow Efficiency Tool – MyECMail

The CM/ECF Mail Manager, Calendaring and Case Management Solution that works seamlessly with Best Case

Available as an add-on workflow tool to Best Case, MyECFMail automates the bankruptcy ECF process by downloading your Free Looks, posting bankruptcy events to the built-in ECF calendar and providing access to these communications in Best Case Bankruptcy.

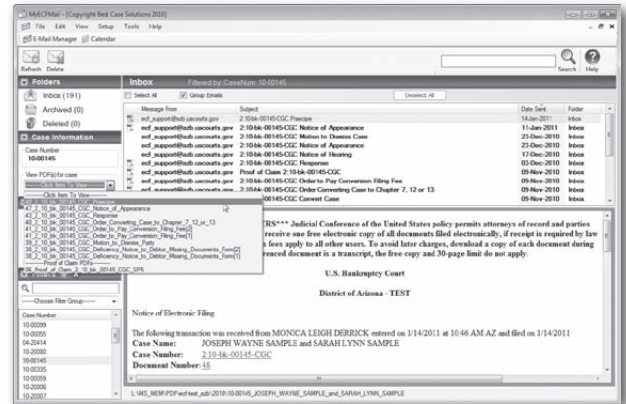
## How MyECFMail Works

There are three main components to MyECFMail:

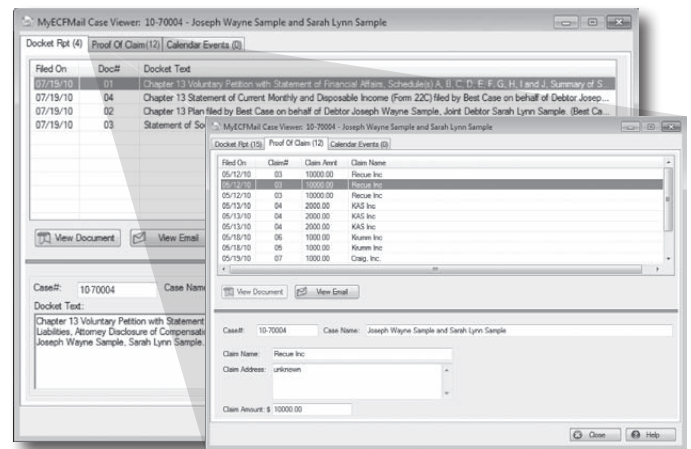
- Email Manager**— This houses all your incoming ECF emails.
  - View summary information of each case including case number and all case PDFs
  - Automatically downloads and saves your Free Looks eliminating unnecessary and costly trips to PACER
  - View, sort and filter based on a variety of criteria
- MyECFMail Case Viewer**— View CM/ECF activity for a client right in Best Case Bankruptcy
  - Docket Report Tab – View case emails and PDFs
  - Proof of Claims Tab – Displays Proof of Claims including claim name, address and amount
  - Calendar Events Tab – Lists events and meetings including location, date and time
- ECF Calendar**— Bankruptcy-specific events are automatically populated to the built-in calendar
  - Auto-populates General Hearing, Discharge Deadlines, 341 Meeting, Confirmation Hearing and Continued Hearing
  - Assigns rules and alarms to remind you of upcoming events
  - Easily export calendar information to Outlook or other iCalendar-compatible software

## To Get Started Using MyECFMail

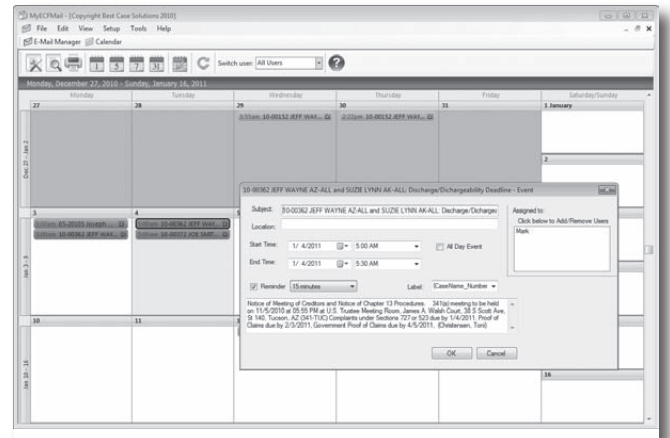
- Attend a FREE product seminar Register at [www.bestcase.com/memdemo](http://www.bestcase.com/memdemo)
- Sign up for a FREE 30-Day Trial Visit [www.bestcase.com/memdownload](http://www.bestcase.com/memdownload)



**MyECFMail Email Manager:** Read case emails, access Free Look PDFs, filter by case number, debtor name and more.



**Case Viewer in Best Case:** Click a tab to instantly view Docket Text, Proofs of Claim or calendar events.



**ECF Calendar:** Upcoming case-related events auto-populate the ECF calendar and can be exported.

# Workflow Efficiency Tool – MyECFMail

## Create a Custom Filter

1. Click the + green button in the Filters window
2. Enter the filter name and click the Add button.

## Apply a Custom Filter to an Email

1. Right-click on the email that you want to apply the filter and select **Add Filter**.
2. A sub-menu listing all currently created filters will appear. From this menu, select the Filter that you would like to apply to the email.

## Defining Calendar Rules

A customized rule creates an event in the MyECFMail calendar whenever keywords or phrases you define are found in the Docket Text of an email.

**Note:** Customized rules operate to the principles of Boolean logic: AND, OR, and NOT.

1. In the top menu bar, go to **Setup**, then **Manage Rules**
2. Click **Add** to create a new Calendar Rule
3. Complete the following fields:
  - **Rule Name:** As listed in the Calendar Rules List
  - **Event Title:** The title of every event the rule creates
  - **Keywords:** Enter the keyword(s) for which this rule will search for in the Docket Text of the email.

**Note:** Separate keywords in a single rule with a semicolon(;)

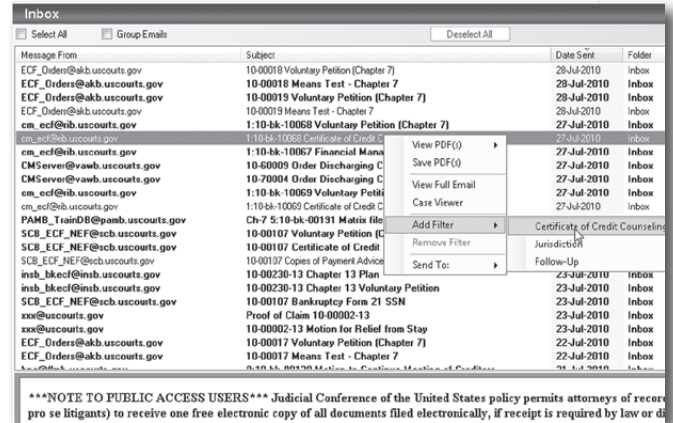
- **AND:** Enter any words or phrases in addition to the Keywords section. This field can be left blank.
- **Exclude:** Enter any word or phrase that provide an exception to the rule. This field can be left blank.
- **Event Description/Body:** The description of every event this rule creates. This field can be left blank.

**Note:** If the time of an event is unable to be determined, it will be populated at 5:00 AM on the date of the event.

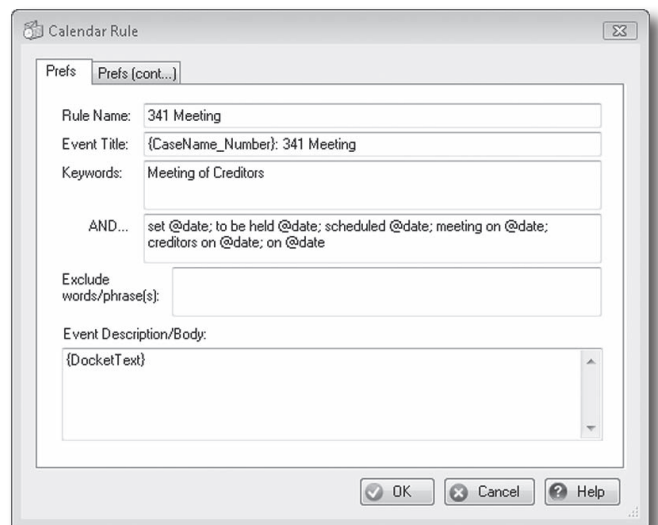
## Export the ECF Calendar

Easily export the MyECFMail Calendar data so you can transfer events into your daily calendar.

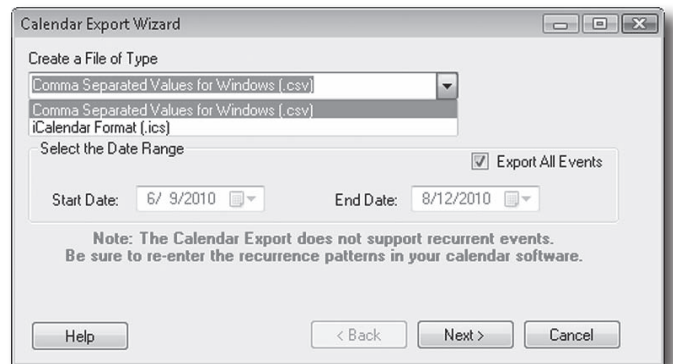
1. In the top menu bar, go to **Tools**, then **Calendar Export Wizard**
2. Choose between two file types: Comma Separated Variable (.CSV) or iCalendar (.ICS) format
3. Select a date range, click **Next**
4. Choose a location to save the file, click **Save**
5. Click **Close** once the export file is created



Keep organized by applying custom filters to emails.



Create customized Calendar Rules to auto populate events specific to your jurisdiction.



If you are importing items into Google Calendar, choose .CSV, Outlook users choose .ICS.

# Shortcuts and Online Tools

Keys	Action
Esc	Go back a screen
Ctrl + C	Copy
Ctrl + X	Cut
Ctrl + V	Paste
Ctrl + Z	Undo
Tab	Move forward from field to field
Shift + Tab	Move backward from field to field
F1	Opens context-sensitive help
Ctrl + \	Opens spell check

Client List	
Ctrl + O	Opens the Client List Window
Ctrl + Shift + N	Access Client Notes Screen
Ctrl + Shift + R	Rebuild the Client List
↑ ↓	Open a Client file. Highlight with arrows and click enter

Forms and Schedules	
A-J	Opens a Schedule: Choose corresponding letter
1	Opens the Voluntary Petition
4	Opens Form 4
6	Opens the Summary of Schedules
7	Opens the State of Financial Affairs
8	Opens the Chapter 7 Individual Debtor's State of Intention
3	Opens the Chapter 13 Plan Calculator
Ctrl + Shift + J	Opens the Jurisdiction Window
Ctrl + Shift + K	Opens the Form Preference
Ctrl + Shift + P	Opens the Best Case Standard Preferences
Alt + Enter	Add new items to a schedule in an entry screen.

Accelerator	
Alt + underline letter	Jump to a question that has one letter underlined

## Best Case Online Tools

Access a suite of online tools to help calculate dates and formulas instantly.

### Quick Median Income Test

Enter the debtor's state, household size and average gross monthly income and the debtor will be compared to the state median income for the household size. If the debtor is under the median income the results will be in green and if they are over the median income the results are in red.

### Date Calculator

Add or subtract days, months and years to a specified date to identify time spans for the Statement of Financial Affairs, eligibility for a Homestead Exemptions Limit, etc.

### Between Dates Calculator

Enter a date range and quickly get the number of days between them. This is ideal for identifying the financial management requirement (180 days), etc.

### Holiday Calculator

Enter a specific year (ie 2011) and the calculator will automatically return a list of the observance dates of all Federal Holidays for that year.

Visit: [www.bestcase.com/onlinetools](http://www.bestcase.com/onlinetools) or access directly from the Tools Menu.

Printing	
B + Spacebar	Select the form with the arrow key, then click the spacebar to print
Shift + Spacebar	To select all forms
Ctrl + P	To print the selected forms

For more information call 1.800.492.8037 or visit [www.bestcase.com](http://www.bestcase.com)