

Best Case by STRETTO

# Getting Started Guide

This quick-start guide helps you begin using Best Case in a flash. With step-by-step instructions for installation and registration, an introduction to using your software and an explanation of customer support and training, this guide will provide you a comprehensive overview of your Best Case Bankruptcy purchase.

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# WELCOME TO THE BEST CASE COMMUNITY

Thank you for selecting Best Case Bankruptcy to help you prepare, file and manage bankruptcy cases. Whether you are new to bankruptcy or switching software providers, we know you will be satisfied with your purchase. Best Case Bankruptcy was specifically developed with the bankruptcy practitioner in mind and delivers the fastest and most reliable electronic filing system, an easy-to-use interface and workflow tools to help you improve firm efficiency.

## Customer Benefits

Your initial purchase of Best Case Bankruptcy includes one year of maintenance, which gives you access to a wide-array of services that assist you in the bankruptcy process. Read on to explore the benefits you receive as a customer.



### FREE SOFTWARE UPDATES

Federal and local forms, revised Census Bureau and IRS data, feature updates and more.



### CUSTOMER PUBLICATIONS

Stay up-to-date on the latest features with Best Case Spotlight, the quarterly e-newsletter.



### SUPERIOR SUPPORT AND SERVICES

Get your questions answered instantly from our specialists by phone or email.



### WORKFLOW TOOLS

Save time with integrated tools including MyCaseInfo, Mail It, Court Notices and more.



### ONETOUCH® E-FILING

In a few clicks, transmit a client's complete or emergency petition to the Court's site.



### INTEGRATED DATA

Easily order, import and access credit report data and more without leaving Best Case.



### FREE TRAINING PROGRAMS

Gain insight into key features with guides, videos, webinars and more.



### COMMUNITY FEEDBACK

Participate in surveys, focus groups and site visits to drive future enhancements.

Don't let your One-Year Maintenance Plan lapse! At the end of your first year, you have the option of renewing the Maintenance Plan for an annual fee. This provides continued access to the above benefits including software updates, OneTouch filing and much more.



### 60-DAY MONEY-BACK GUARANTEE

Your order is absolutely risk-free. If you're not 100% satisfied with Best Case Bankruptcy, simply contact us within 60 days of your purchase date for a complete refund.

## Installation

Installing Best Case Bankruptcy is a quick and easy process. If you've already downloaded the demo version of Best Case, you can skip to Registration.

### INSTALL BEST CASE ON THE DESKTOP

1. Visit [www.bestcase.com/benefits](http://www.bestcase.com/benefits) and click the download button.
2. Follow the instructions in the Installation Wizard. Best Case automatically saves to the C: Drive in a new \BestCase subfolder.

### INSTALL BEST CASE ON A NETWORK

1. Visit [www.bestcase.com/benefits](http://www.bestcase.com/benefits) and click the download button.
2. Follow the instructions in the Installation Wizard but replace your network drive letter for the C: drive in the destination directory box 3.
3. From each workstation, create a shortcut from the desktop that points to the BESTCASEWINBFS.EXE file on your network drive. For more detailed information, visit [www.bestcase.com/network-install](http://www.bestcase.com/network-install).

**NOTE:** All users running Best Case should be granted full rights to the \BESTCASE directory and all of its subdirectories.

**NOTE:** Call us to request a Best Case CD, if you are unable to download from the software.

## Registration

### TO REGISTER/UNLOCK YOUR SOFTWARE

To unlock Best Case Bankruptcy with your unique registration information, open Best Case, click **Help > About**, then click **Unlock/Upgrade**. Enter the unlock information exactly as it appears in the email you received.

### SAFEGUARD YOUR REGISTRATION CODES

Your serial number and registration/unlock codes can only be used by your law firm. Your license agreement strictly prohibits you from giving unlicensed users your Best Case Bankruptcy CD, registration/unlock codes and any documentation.

## The Setup Wizard

Once Best Case has been launched, the Setup Wizard prompts you to complete basic information about your law firm, attorneys, jurisdictions, the attorney compensation statement and more.

Complete the Wizard before you begin your first case, as it helps to reduce redundant data entry and sets firm preferences and data-entry shortcuts for all cases you prepare.

### SYSTEM REQUIREMENTS

- A PC-compatible computer with a Pentium®-class III (or equivalent) processor
- Windows® 10, 8.1, 8.0, or 7.0
- 128 MB RAM
- 60 MB of hard disk space
- Internet Explorer® 8.0, 9.0, 10.0 or 11.0 with a high speed internet connection for electronic filing
- An Intel® Core™2 Duo Mac® running Windows through Boot Camp® or Parallels Desktop®

### ADDITIONAL REQUIREMENTS

- For BestScan™ - Scanners must have a TWAIN driver
- Word processing software is not required to print the Official Federal Forms and Schedules but it is required for the Additional Documents Library
- NET 4.6 Client Profile
- Adobe® Reader®

### To utilize online Court Notices and Calendar:

- 4 GB or greater memory
- Any Intel i3 or i5 or i7 Processor or equivalent AMD processor
- 1680x1050 or higher resolution display resolution (monitor)
- Windows 7 with Service Pack 1 or newer; or Mac OS X 10.9 or newer (Licensee must install all latest service packs and hot fixes for the operating system used)
- IE 10.x or newer, Firefox 45.x or newer, Safari 9.0 or newer
- Download speed of 3 to 6Mbps or higher and upload speed of 764Kpbs to 1.5 Mbps or higher (Test your Internet connectivity by going to [www.speedtest.net](http://www.speedtest.net))

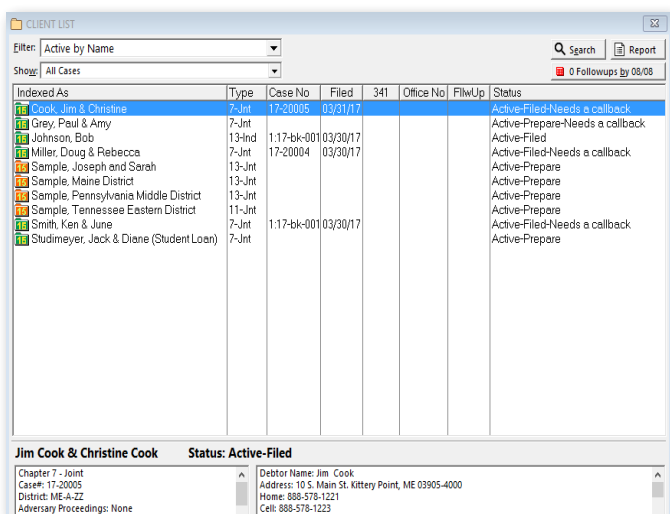
# OVERVIEW OF BEST CASE BANKRUPTCY

## Case Preparation Made Easy

Best Case Bankruptcy is organized by a series of screens that prompt you to provide information about your client in order to create and file an electronic petition. Read on for an overview of the important steps in the process.

### 1. Create a New client

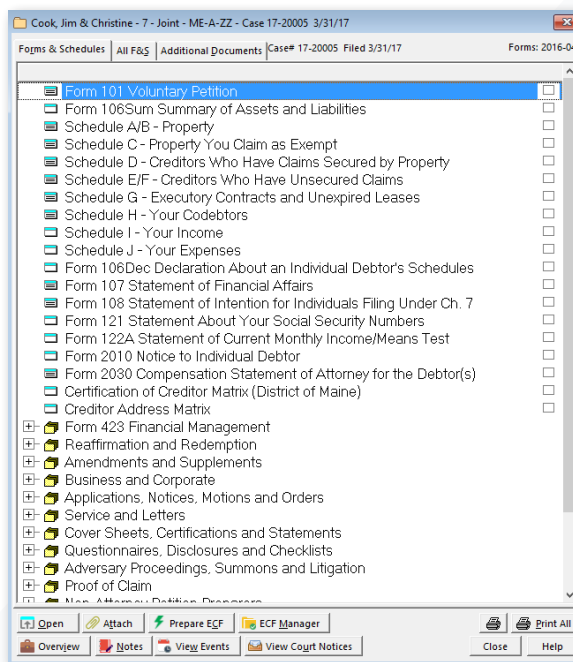
Click **NEW** to create a client file. All files are housed in the Client List Window which gives attorneys a global view of all cases including case status and filing type. **DOUBLE CLICK ON THE DESIRED CLIENT FILE** to access the Forms and Schedules Menu and begin preparing the petition.



**CLIENT LIST WINDOW:** Client management features in Best Case make it easy to access files. Filter client files with the drop down menu to easily view and retrieve specific cases.

### 2. Enter Case Data

The Forms and Schedules Menu contains all federal court-required documents for a particular case. They are organized in the specified order of completion starting with the Voluntary Petition. **DOUBLE CLICK ON VOLUNTARY PETITION** to open to the entry screen and begin entering case data.



**FORMS AND SCHEDULES MENU:** Open to edit and complete a specific Form or Schedule.

## The Basics of Best Case Online Webinar

Ideal for new users, this free webinar guides users through the bankruptcy process from start to finish.

→ Register today: [www.bestcase.com/basicsofbestcase](http://www.bestcase.com/basicsofbestcase)



## Best Case Bankruptcy Expands with Your Firm

Expand your license at anytime to begin filing additional chapters or upgrade to a Multi-User License to allow simultaneous access over a network. It's easy to upgrade at anytime.

Call 800.492.8037 to discuss your options.

### 3. Complete the Means Test

**DOUBLE CLICK FORM 122** to access the Best Case Means Test Calculator. Enter the required data, calculate current monthly income and run various means test scenarios for a client. Based on the data entered, the Means Test Calculator determines if a Presumption of Abuse exists and if necessary, prompts you to enter additional information. For step-by-step instructions refer to the Means Test guide:

[www.bestcase.com/meanstestguide](http://www.bestcase.com/meanstestguide)

**Form 122C Current Monthly Income, Commitment Period and Disposable Income for Chapter 13**

Enter debtor average income for the last 6 months to compute CMI

General Income Median Living Health House Car Necessary Additional Debt\_Pmt Summary Other All \$

**Calculation of 6 Month Average Income for 707(b)(7)**

	Debtor (a)	Spouse (b)	CMI Details
2. Gross wages, salary, tips, bonuses, overtime, commissions	4,250.72	5,375.00	
3. Alimony and maintenance payments	0.00	0.00	
4. Regular contributions to the household expenses ...	0.00	0.00	
5. Income from operation of business, profession or farm	0.00	0.00	
6. Rents and other real property income	0.00	0.00	
7. Interest, dividends and royalties	50.00	0.00	
8. Unemployment compensation	0.00	0.00	
9. Pension and retirement income (**exclude SSA)	0.00	0.00	
10. Other sources (excl. SSA & victims §101(10A)(B))	0.00	0.00	
11. Subtotal of Average Monthly Income by person	4,308.72	5,375.00	
11. Total Average Monthly Income	9,683.72		CMI §2082 Over Median

Fill in the average monthly income that you received from all sources, derived during the 6 full months ending on the last day of the month before you file this bankruptcy case. 11 USC § 101(10A).

CMI Current Monthly Income: 9,683.72 Over Median, DMI Payment, 5 Yr Plan  
 Less: Deductions: 8,969.05  
 = DMI Disposable Income: 714.67

**FORM 122:** Simplify the means test with easy on-screen instructions, IRS tables and running tallies for CMI and presumption of abuse.

### 4. Enhance your License with a Custom Plan

Numerous jurisdictions require a specific Chapter 13 format to be filed. Best Case developers work closely with the courts to provide customers with **MORE THAN 90 DISTRICT SPECIFIC LOCAL OR CHAPTER 13 PLANS**. These court-compliant plans are available to add onto a license for an additional fee.

For a complete list of custom Chapter 13 plans visit:  
[www.bestcase.com/localforms](http://www.bestcase.com/localforms)

United States Bankruptcy Court  
Northern District of Illinois

Case No. [ ]

Debtor(s): [ ]

Original Chapter 13 Plan, filed December 10, 2016

**Section A. General**

1. A check in this box indicates that the plan contains special provisions, set out in Section G. Observe, the plan includes no provisions deviating from the model plan adopted by the court as of the date of the filing of this case.

2. The debtor's Schedule J includes \$ 2,000 for charitable contributions; the debtor represents that the debtor made voluntarily similar contributions for the 12 months prior to filing this case.

3. The debtor assumes all unsecured leases and executory contracts listed in Section C of this plan, all other unsecured leases and executory contracts are rejected. Both assumptions and rejections are effective as of the date of plan confirmation.

4. Claims secured by a mortgage on real property of the debtor, set out in Section C or in Paragraph 2 of Section E of this plan, shall be treated as follows:

(a) Prepetition defaults: If the debtor pays the cash amount specified in Paragraph 5 of Section E, while timely making all required prepetition payments, the mortgage will be reinstated according to its original terms, extinguishing any right of the mortgagee to enforce any amount alleged to have accrued prior to the filing of the petition.

(b) Costs of collection: Costs of collection, including attorney's fees, incurred by the holder after the filing of this bankruptcy case and before the final payment of the cash amount specified in Paragraph 5 of Section E may be added to that cash amount pursuant to order of the court on motion of the holder.

5. The holder of any claim secured by a lien on property of the estate, other than a mortgage loan as in Section C or in Paragraph 2 of Section E, shall retain the lien until the earlier of (a) payment of the underlying debt determined under nonbankruptcy law; or (b) discharge under 11 U.S.C. § 1123, at which time the lien shall terminate and be released by the creditor.

6. The debtor shall retain assets, including all monies, of all charitable donations listed in Schedule J.

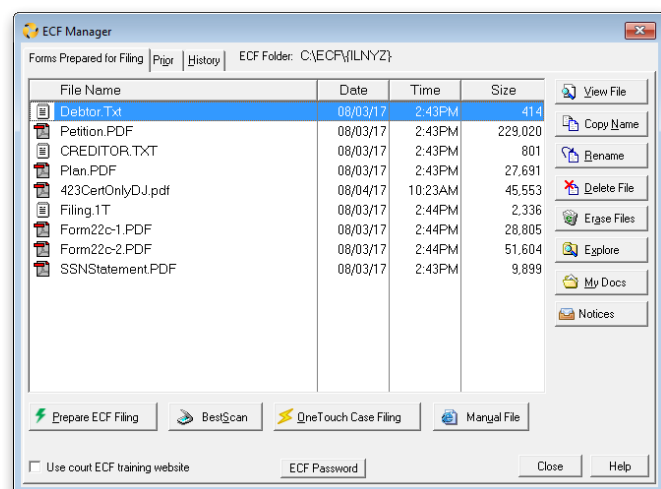
**LOCAL PLANS:** Every jurisdiction has its own unique requirements. Save time by accessing custom forms specifically developed for your Court.

## Accurate Filing Tools

Electronically file in moments, convert data into court-compliant PDFs and reference all case documents in one location, saving you valuable time.

### 5. Create Court-compliant Documents

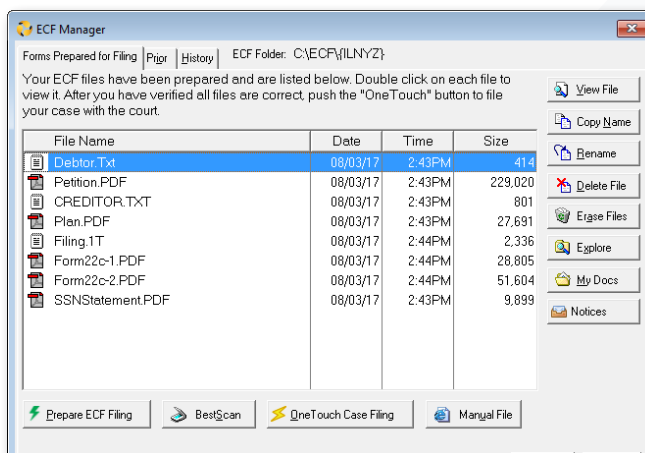
With the **ECF WIZARD**, you can convert the data entered in Best Case into Court-compliant PDF documents with bookmarks for electronic filing. The Wizard walks you through the steps to prepare all of the documents required for the Court in the correct order and any warnings encountered. Organize, store and reference documents including prepared forms, previously filed documents, activity records, receipts and more in the ECF manager.



**ECF MANAGER:** Click the **Prepare ECF Filing** button to access the Wizard and reference all case documents including previously filed documents.

### 6. Electronically File with OneTouch

**IN JUST A FEW CLICKS**, files are created in the proper format and uploaded to the Court's website. Once submitted, a confirmation is sent with a receipt and case number. It's that simple. For detailed instructions, download the Electronic Filing guide at [www.bestcase.com/electronicfilingguide](http://www.bestcase.com/electronicfilingguide)



**ELECTRONIC CASE FILING:** Click the **OneTouch Case Filing** button and watch as Best Case automatically files the case on the Court's website.

## Post-petition Filing

### SAVE VALUABLE TIME NAVIGATING THE COURT'S WEBSITE

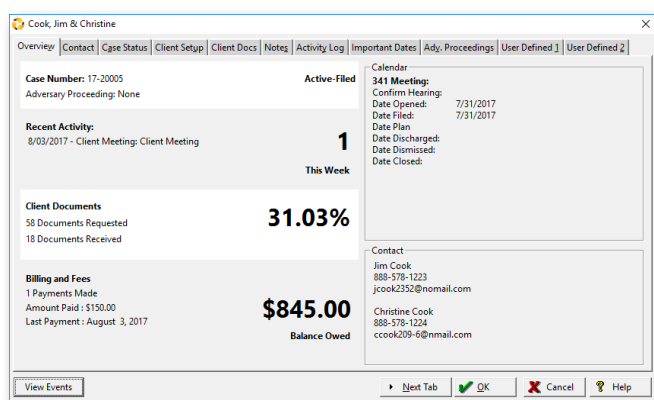
In a couple of clicks, OneTouch® creates and automates the post-petition filing of Form 423 and the Chapter 13 Plan. For other events, ECF Express simplifies the manual filing process, by eliminating various data entry by completing various tasks for you.

# Streamline the Management of Bankruptcy Cases

Easily track, filter and report data putting you in complete control of every case.

## 7. Keep track of case activity

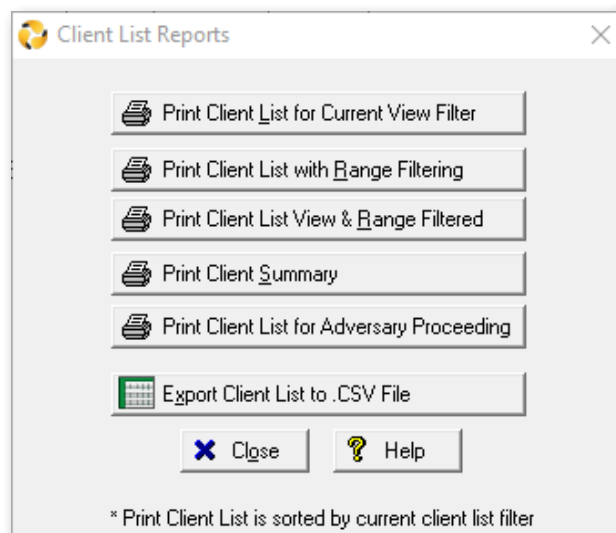
The **CLIENT AND CASE OVERVIEW WINDOW** allows you to view the Case Status, add Adversary Proceedings, track client-provided documents, log client communications, keep track of important events, track lead source and billing and capture custom client data.



**CLIENT AND CASE OVERVIEW:** Open from the Client List by clicking the **Overview** button to access Case Status, Client Documents, Billing and more.

## 8. Manage clients effectively

**CLIENT LIST REPORTS** provide you with key information regarding each case. Filter by criteria based on filing and case status, important dates and more. Search for clients by Name, Social Security or other contact information. Run reports to view a summary of your client list based on custom filters, adversary proceedings or export your clients to .CSV.



**REPORTS:** Filter by your selected Criteria in the top left corner of the Client List or click the **Report** button in the top right corner.

## Workflow Tools help streamline the process

Best Case's integrated workflow tools help improve your firm's efficiency every step of the way.

**BANKRUPTCY COURSE MANAGER** allows you to simplify time-consuming tasks related to bankruptcy courses with features that include, automated email and text (SMS) reminders and auto-filing of the debtor education certificate.

**COURT NOTICE AND CALENDAR INTEGRATION** allows you to easily manage the tedious and costly process of organizing and downloading CM/ECF court notices, directly from Best Case.

See page 9 to learn more



# CUSTOMER SUPPORT

## Helpful Resources and Services

Get up and running quickly with a variety of resources including technical support documentation, friendly phone support, videos, guides and webinars. Training resources help keep you current with new features, teach advanced functionalities and provide insight into tools that can save you valuable data entry time. Learn more at [www.bestcase.com/resources](http://www.bestcase.com/resources).

### Technical Support

Get your questions answered from friendly Best Case experts, Monday through Friday, 7:00 AM - 5:30 PM CT. Be sure to have your firm name and serial number ready.

Call toll-free: **800.492.8037 (Option 2)**

Email: [help@bestcase.com](mailto:help@bestcase.com)

### Access the Internal Help File

Context-sensitive help is available throughout the program. Instantly access step-by-step instructions on a variety of topics with a click of a button within Best Case. **Press F1**, or click the **Help** button.

### Online Calculators

Access tools that help you easily calculate:

- Quick Median Income Test
- Filing & Eligibility Calculator
- Date Calculator
- Days Between Calculator
- Holiday Calculator

### Resource Library

Once the basics are mastered, visit the online Resource Library to view guides, videos, recorded webinars and technical documents on:

- Bankruptcy Courses
- Chapter 13 Plans
- Client Intake
- Client/Case Management
- Court Notices
- Credit Reports
- Data Entry
- Electronic Filing
- Means Test
- Online Calendar
- Post-petition
- Student Loans
- Tax

### WHAT'S NEW

Review what's new in Best Case, including the latest form changes, enhancements and more. Search by release date or state.

[www.bestcase.com/whatsnew](http://www.bestcase.com/whatsnew)

## The Basics of Best Case Online Webinar

Explore Best Case right from your desktop. Created for new users, this webinar guides you through preparing a petition to electronically filing a case. Join a Best Case expert for a 45-minute presentation and discover how to:



- Create a new client file
- Complete schedules and forms and see how properties, liens and exemptions are linked
- Use BestScan to scan and attach documents
- Apply the means test provisions with the Best Case Means Test Calculator
- File electronically using the ECF Wizard and OneTouch

**Register online: [www.bestcase.com/basicsofbestcase](http://www.bestcase.com/basicsofbestcase)**



## WORKFLOW EFFICIENCY TOOLS

Best Case Bankruptcy is the central piece in the bankruptcy process delivering faster and more accurate case preparation and e-filing. These integrated workflow tools help improve your firm's efficiency every step of the way:



**CREDIT REPORT MANAGER:** Save more than 60 minutes of data entry per case when you order and import Bankruptcy Credit Reports.



**BANKRUPTCY COURSE MANAGER:** Simplify time-consuming tasks related to managing bankruptcy courses for no additional cost to your firm.



**COURT NOTICES:** Manage tedious and costly tasks regarding CM/ECF Court notices and automatically download your Free Looks.



**STUDENT LOAN ANALYZER:** Analyze the likelihood of discharging student loan debt in bankruptcy with built-in tools that assist with the process.



**CLIENT INTAKE:** Save your firm hours of data-entry time with MyCaseInfo, a secure online client questionnaire.



**CASEASSIST:** Quickly obtain client data such as credit reports, bankruptcy courses and income and asset data in a few clicks.



**DOC SERVICE:** Streamline post-petition noticing to creditors with Mail It, a feature that works as your extended staff taking care of printing and postage.

**READ ON TO LEARN MORE**

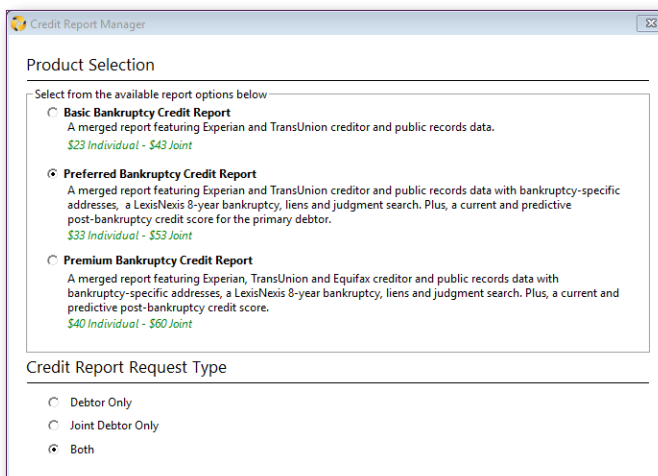
## Credit Report Manager

### Save time by directly importing credit reports

Without leaving Best Case, import creditor data saving you an average of 60 minutes of data entry per case. Plus, get access to a PDF of the report to share with your clients.

#### BENEFITS OF CREDIT REPORT MANAGER:

- **Save 60+ minutes of data entry:** Import creditor data directly into Schedules D, E, F or G.
- **Avoid missed liabilities:** In one report, get merged data from 2 or 3 credit bureaus.
- **Reduce time and money spent re-noticing:** Import bankruptcy department addresses that are continually updated by our team.
- **More than just bureau data:** Includes a current and predictive credit score and a LexisNexis 8-year bankruptcy, judgment and liens search.



Learn more: [www.bestcase.com/creditreports](http://www.bestcase.com/creditreports)

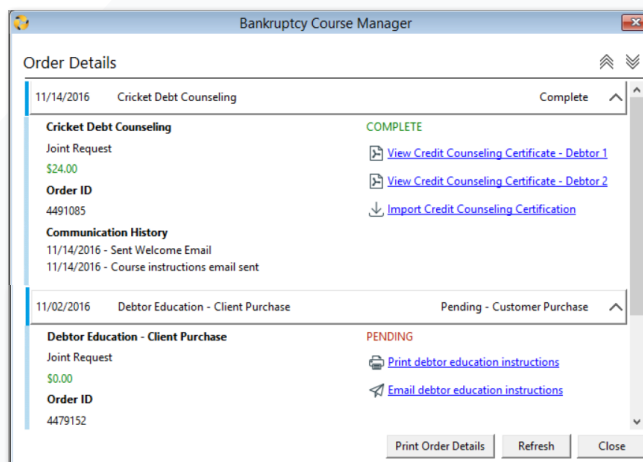
## Bankruptcy Course Manager

### Simplify the bankruptcy course process

Save time and avoid the unnecessary hassle related to managing bankruptcy courses. Streamline reminding clients and obtaining certificates for no additional cost to your firm, without leaving Best Case.

#### BENEFITS OF BANKRUPTCY COURSE MANAGER:

- **Immediate delivery of the certificate and auto-filing:** On completion, access the certificate directly from the Best Case client file. You can also auto-file the Debtor Education Certificate and access the receipts in the client file – No need to ever file Form 423 again.
- **Automated client reminders and firm notifications:** Set notification preferences once to automatically remind all clients by email or text (SMS) to complete the course and alert your firm to expiring certificates or uncompleted courses.
- **Print course handouts:** Save time by giving your clients bulk instructions and get the certificate in the client file.
- **Course payment options:** No matter if you or your client pays for the course, get access to all the great benefits.



Learn more: [www.bestcase.com/bkcoursemanager](http://www.bestcase.com/bkcoursemanager)



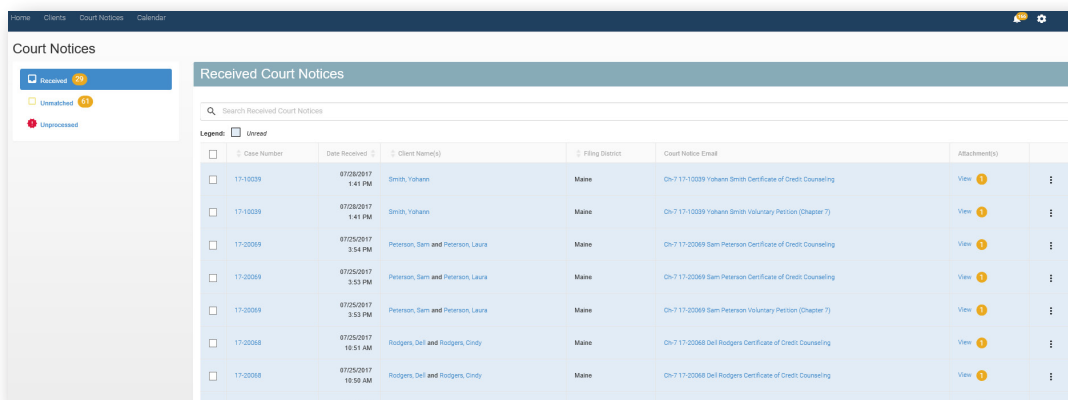
## Court Notices

### Manage tedious and costly tasks regarding court notices

Quickly view Court emails, Free Look PDFs and upcoming events for no additional cost.

#### BENEFITS OF COURT NOTICE INTEGRATION:

- **Save money by avoiding costly PACER fees:** Your Free Looks are automatically downloaded, eliminating time and money spent on saving PDFs.
- **Improve case management:** View recent notices and upcoming Court dates directly from the client file.
- **Never miss a Court deadline:** Court events are automatically populated on the Integrated Calendar, saving time on manual scheduling.
- **View important events online:** The Integrated Calendar provides access to important dates related to cases or clients.



Learn more: [www.bestcase.com/courtnotices](http://www.bestcase.com/courtnotices)



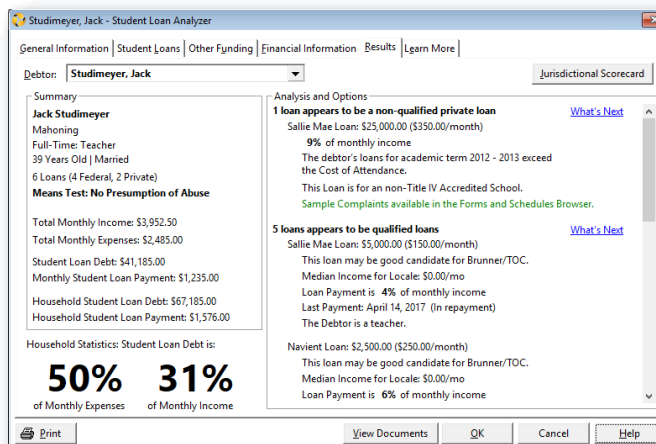
## Student Loan Analyzer

### Quickly analyze whether student loan debt is dischargeable

Evaluate your client's student loan information to provide helpful solutions on how to tackle the debt.

#### BENEFITS OF THE STUDENT LOAN ANALYZER:

- **Built-in calculations:** Enter client data including student loans, grants, scholarships and financial data to identify the correct solution.
- **Institution lookup:** Quick access to a school's cost of attendance (COA) and accreditation status.
- **Jurisdictional Scorecard™:** Explore statistics for dischargeability based on jurisdiction, circuit and by judge.
- **Comprehensive analysis:** Learn how to address next steps with detailed how-to instructions.



Learn more: [www.bestcase.com/studentloans](http://www.bestcase.com/studentloans)

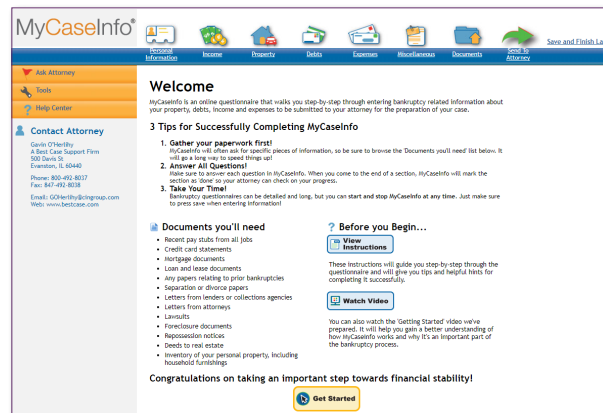
## Client Intake

### Save hours of data entry with MyCaseInfo®

MyCaseInfo® helps ease the initial data entry process with a secure, web-based client questionnaire for Chapter 7 and Chapter 13 cases. Easily preview, download and import the data directly into Best Case.

#### BENEFITS OF MYCASEINFO®:

- **Save time on data entry:** Import client-entered data directly into a Best Case client file saving hours of data entry.
- **Monitor and preview client progress:** See what questions have been answered and which documents have been uploaded to ensure quality and completeness.
- **Share documents through a secure portal:** Request clients to upload bankruptcy related documents such as the Certificate of Credit Counseling, Tax Transcripts and Paystubs to better manage and organize data.
- **Access a Spanish questionnaire:** Serve a broader range of clients. All questions, labels, action buttons, drop-down lists and guides are translated to Spanish for easy comprehension.



Learn more: [www.bestcase.com/clientintake](http://www.bestcase.com/clientintake)

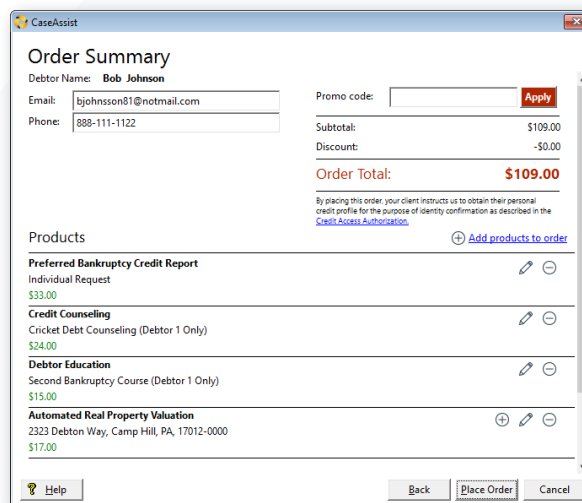
## CaseAssist

### Save time ordering data products and services at one time, from one provider

CaseAssist helps you quickly obtain data products and services from CIN Legal Data Services for your client in just a few clicks.

#### ORDER THE FOLLOWING THROUGH CASEASSIST:

- **Bankruptcy Credit Reports:** Quickly order and import creditors into the Forms and Schedules. Choose between 2 and 3 bureau reports and never miss a liability or sort through multiple reports again.
- **Bankruptcy Courses:** Simplify the bankruptcy course process for no additional cost to your firm. Streamline the time-consuming tasks of reminding clients and obtaining certificates.
- **Income and Asset Data:** Acquire up to 4 years of official Tax Transcripts and establish property values with an Automated Real Property Valuation or a Boker Price Opinion.



Learn more: [www.bestcase.com/caseassist](http://www.bestcase.com/caseassist)

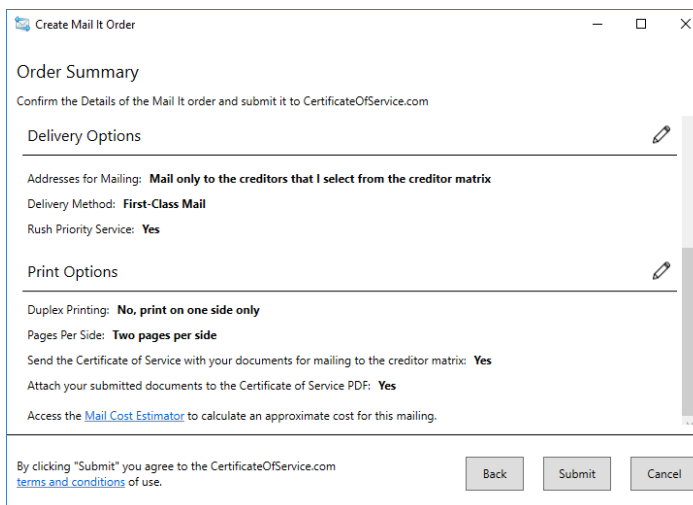
## Doc Service

### Save time and money on your post-petition creditor noticing

Mail It connects with CertificateOfService.com, an officially recognized notice provider, working as your extended staff handling post-petition bankruptcy notices to creditors. Save time by submitting your creditors directly from Best Case.

#### BENEFITS OF MAIL IT:

- **Submit the documents from Best Case:** Use case data to submit post-petition documents directly from your software.
- **Save 45 minutes per case:** Eliminate time spent printing and mailing post-petition notices to creditors.
- **Save money:** Cut down on paper, printing, postage and staff costs by selecting the documents you wish to serve and mailing them via CertificateOfService.com.
- **Access to the Certificate of Service:** Access the Certificate of Service directly from the ECF Manager.



**Create Mail It Order**

Order Summary  
Confirm the Details of the Mail It order and submit it to CertificateOfService.com

**Delivery Options**

Addresses for Mailing: **Mail only to the creditors that I select from the creditor matrix**

Delivery Method: **First-Class Mail**

Rush Priority Service: **Yes**

**Print Options**

Duplex Printing: **No, print on one side only**

Pages Per Side: **Two pages per side**

Send the Certificate of Service with your documents for mailing to the creditor matrix: **Yes**

Attach your submitted documents to the Certificate of Service PDF: **Yes**

Access the [Mail Cost Estimator](#) to calculate an approximate cost for this mailing.

By clicking "Submit" you agree to the CertificateOfService.com [terms and conditions](#) of use.

Back Submit Cancel

Learn more: [www.bestcase.com/docservices](http://www.bestcase.com/docservices)

## PARTNERSHIPS

### Secure Cloud Computing

ACCESS BEST CASE ANYWHERE AND ON ANY DEVICE

Best Case has partnered with CyberlinkASP to provide a tested and secure web-based hosting solution for all your office applications including Best Case.

### Tax Discharge Determinator

EASILY CHECK DISCHARGABLE TAX DEBT

Best Case has partnered with Tax Discharge Determinator, an inexpensive, easy-to-use online program that can quickly calculate the earliest date you can discharge certain tax debts.

### Automobile Valuation Review

KEEP CLIENTS IN THE DRIVER SEAT

Best Case has partnered with 722 Redemption Funding, Inc., an easy-to-use online program to provide your client with a complimentary automobile valuation review.

Learn more: [www.bestcase.com/partnerships](http://www.bestcase.com/partnerships)

# QUICK START GUIDE - BEST CASE BANKRUPTCY

## 1. Enter Case Information

All forms located in the Forms and Schedules Menu are listed in the order your Court requires. Double-click on the Voluntary Petition to start entering information.

## 2. Print Documents

From the Forms and Schedules Menu, click the checkbox next to the name of the document. To print all forms, click the **Print All** button.

1. When a document is marked to print, a printer icon appears next to it in the print column.
2. Click the **Print** button in the bottom toolbar.
3. The Print Document window appears. If necessary, adjust the print options, such as:
  - Print the word "Draft" on forms, or
  - Print the date on signature lines
4. Click **Print** to send documents to the printer.

## 3. Scan with BestScan™

BestScan converts scanned documents to PDF files, making it the perfect tool for scanning supplemental documents, such as certificates or pay stubs.

1. In a client file, open the **ECF Manager**.
2. Click **BestScan**, located in the bottom row of buttons.
3. Load the document into the scanner and click **Scan**.
4. Click **Save PDF**.
5. Name the file and click **Save**. The name of the new PDF file is displayed in the ECF Manager.

**TIP:** OneTouch® recognizes and uploads files with specific names. For naming conventions, see the Electronic Case Filing guide.

**IMPORTANT:** You must have a TWAIN driver enabled.

## 4. File Electronically with OneTouch

Electronic filing is quick and easy with OneTouch. To prepare PDF files and upload them to the Court's website, follow these easy steps:

1. Enter all data for your case in Best Case.
2. Click the **Prepare ECF Filing** button to prepare PDF files with the ECF Wizard.
3. When files are ready, the ECF Manager appears.
4. To transmit files to the Court, click the **OneTouch Case Filing** button.
5. At the login screen, enter your login name and password, and click **File Case**. Best Case will then automatically submit your files to the court and return a case number. Your case is filed!

**TIP:** Practice uploading documents to the Court's training website by checking the box in the lower left corner of the ECF Manager.

## Get Technical Support

1. Access the Help File: Help topics are available for every entry screen, feature and functionality in Best Case Bankruptcy. Click the **Help** button in the menu bar for instructions or press F1.
2. Email Technical Support: [help@bestcase.com](mailto:help@bestcase.com)
3. Call Technical Support: [800.492.8037](tel:800.492.8037)
4. View Training Resources (guides, videos, webinars): [www.bestcase.com/resourcelibrary](http://www.bestcase.com/resourcelibrary)