

Document Upload Instructions

The Trustee now accepts the delivery of certain documents through a Document Upload Portal through the Trustee's Case Access System. Only certain documents are accepted and access to the Upload Portal must be granted by the Trustee. Failure to adhere to the Document Upload Guidelines will result in the suspension of access to the Document Upload Portal.

1. Navigate to the [Trustee's Case Access System](#).
 - a. Enter your assigned Username and Password.



please enter your user id and password

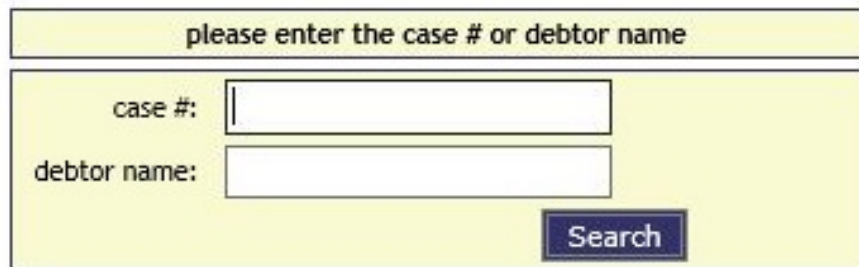
user id:

password:

[forgot your password?](#)

Login

- b. If you do not currently have a username and password, please complete and return the Internet Access Agreement from the Trustee's website.
2. Documents can be uploaded in two ways. The first is by navigating to the in which you would like to upload the document.
 - a. Enter the Case Number or Debtor Name.



please enter the case # or debtor name

case #:

debtor name:

Search

- b. To the left of the Case Information will appear a link that says "Upload Documents to Trustee."

- c. This link will navigate to the Document Upload Portal with a drop down menu allowing you to select the document type to be uploaded.
 - i. Only the documents that the Trustee accepts via the Document Upload Portal are available in the drop down menu.
 - ii. Documents uploaded under an incorrect document type could result in the suspension of access to the Document Upload Portal.

- d. After selecting the document type, click browse to navigate to the location of the saved document.
 - i. Documents must be uploaded in PDF format with a file size limit of 20 MB.

previously uploaded files for case

Case	Date	File Name	Doc Type	Description

Case

Date

File Name

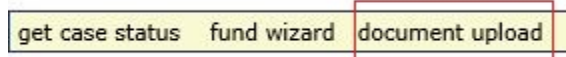
Doc Type

Description

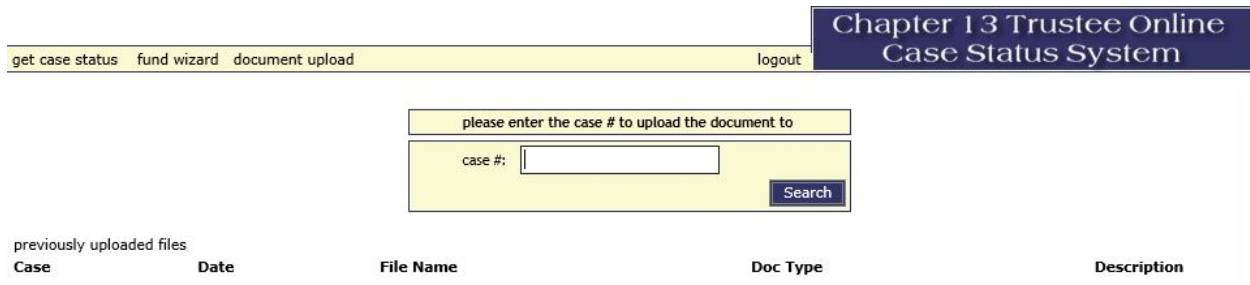
- e. Enter the Description of the document.
 - i. Bank Statements: Include the Date of the Statement (month and year), the Institution Name, and the Last Four Digits of the Account Number.
 - ii. Business Questionnaire: Include Debtor Last Name
 - iii. Payment Advices: Include the Debtor Name (if a joint case), the Employer Name, and the Date of the Pay Stub (month and year).
 - iv. Tax Returns: Include the Year and whether they are Federal or State
 - 1. Federal and State Returns may be uploaded as one file. Do not combine more than one tax year into a single file.
 - v. Trustee Questionnaire: Include Debtor Last Name
- f. Select Submit to Upload the Document to the Trustee's System.

- g. Previously uploaded documents will be listed below the Upload Portal box.
- h. ALL DOCUMENTS MUST BE REDACTED PRIOR TO UPLOAD.
FAILURE TO REDACT WILL RESULT IN THE SUSPENSION OF
ACCESS TO THE DOCUMENT UPLOAD PORTAL.

3. The other option is to select “document upload” from the toolbar in the top left of the window



a. This will navigate to a search box that allows you to enter the Case Number.



- b. Enter the case in which you would like to upload the document and click search.
- c. This will open the Document Upload Portal for the searched case.
- d. Follow the same procedure as above.

4. All documents should be available to the Trustee within a business day of uploading.