

Rules & Guidelines for Document Upload Use

The Trustee requires that all users adhere to the rules and guidelines regarding the use of the Document Upload portal.

1. All documents must be properly redacted. This includes social security numbers, dates of birth and account numbers.
2. Only the following documents will be accepted through the Trustee's Document Upload Portal: Tax Returns, Bank Statements, Pay Advices, Trustee Questionnaires, and Business Questionnaires.
 - a. All other documents are not accepted through the Document Upload Portal and should be sent to the Trustee's Office through mail, email or fax.
3. All documents must be uploaded to the correct case.
4. All documents must be uploaded using the appropriate document type.
5. Do not combine multiple document types into one uploaded file (e.g. Bank Statements and Tax Returns).
6. Federal and State Tax Returns may be uploaded as one file as long as they are for the same tax year.
 - a. Do not upload returns for multiple tax years as one file.
7. Descriptions must be accurate and specific.
 - a. Bank Statements descriptions must include the date of the statement (month and year), the institution name, and the last four digits of the account number.
 - b. Tax Returns must be labeled as Year – (Federal/State/Combined) Tax Returns.
 - c. Pay Stubs must identify the Debtor (if a joint case), the Employer and the date of the pay stub (Month and Year).

Failure to abide by these rules and guidelines will result in the removal of access to the Trustee's Document Upload Portal.

I have read, acknowledged and agree to abide by the Rules & Guidelines for Document Upload Use.

Signature

Date

Name (Printed)

Web Access User ID