

## FILING BY DISKETTE

### WHAT YOU NEED:

- Personal computer running a standard platform such as Windows 95 or higher.
- Word processing program, such as WordPerfect or Word.
- IBM format 3.5 inch 144 megabyte diskette.
- Adobe Acrobat 4.0 or higher software to convert documents from a word processor to Adobe Portable Document Format (PDF).
- Scanner to convert paper documents to electronic documents (resolution: 300 dots-per-inch (dpi)).

### IMPORTANT POINTS TO REMEMBER:

- **Use one diskette for each filing.** Only one petition, motion, response or application, together with accompanying documents, should be included on a diskette. Most filings will fit on a single diskette. Even a petition and schedules, matrix, and a scanned signature declaration form will fit on a single diskette. Use a second diskette only if absolutely necessary.
- **Submit documents in a single PDF file.** Except for a petitions submitted on diskette, all items that are part of a single submission must be included in a single electronic file on the diskette. For example, an attorney submitting a motion on diskette must include all documents required by local rule for a complete motion filing (i.e., the notice of hearing and motion, affidavit or verification, memorandum, proof of service and proposed order) in a single electronic file in PDF format, in the correct order. Note that the proposed order should always be the last item in the electronic file. Although the Clerk's Office staff review each document in the filing, and each page in each document, to make sure the filing is complete and the documents are in the correct order, we are not able to "fix" an electronic filing. If your filing is deficient or defective, we may request that you redo it.
- **Signatures.** Submission of a properly labeled diskette (see labeling instructions below) operates as the signature of the attorney identified on the diskette and all members of that attorney's staff, wherever their signatures would be required in the documents submitted. Verifications, affidavits and other documents requiring the signatures of individuals other than the attorney or the attorney's staff must include the scanned holographic signature of the verifier, affiant, etc. as part of the filing. Petitions, schedules, plans and conversion must be accompanied by an electronic signature declaration form (see instructions Debtors' signatures on petitions, schedules, plans and in section II below).

### FOLLOW THESE INSTRUCTIONS:

- I. Step-by-step instructions for **General Document Filing** by diskette
  - A. Prepare the documents that will make up your filing. Save each document to its own file.
  - B. Convert each document to PDF.
    1. For documents that were created in WordPerfect:
      - a. On the **F**ile menu, click **P**rint.
      - b. On the "print" screen, in the **C**urrent printer box, select **A**crobat **P**DFWriter.
      - c. Click **P**rint.
      - d. In the **S**ave PDF File As dialog box, type in the name of the file in the **F**ile **N**ame box. Then choose a directory in which to save the file. Click **O**K.
    2. For documents that were created in Word:
      - a. On the **F**ile menu, click **P**rint. **Note: Do not click the print icon!** That prints the document without opening the print dialog box.
      - b. In the **P**rint dialog box, select **A**crobat **P**DFWriter.

- c. Click **OK**.
  - d. In the **Save PDF File As** dialog box, type in the name of the file in the **File Name** box. Then choose a directory in which to save the file.
  - e. Also, in the **Save PDF File As** dialog box, in the lower left-hand corner, if the **Prompt for Document Info** checkbox is selected, you will be prompted to create summary information about the document. The Court does not need this information. You can skip this step if you deselect the checkbox.
  - f. Similarly, in the lower right-hand corner of the **Save PDF File As** dialog box, if the **View PDF File** checkbox is selected, Adobe Acrobat opens and displays the PDF file you created. You can skip this step if you deselect the checkbox.
  - g. In Microsoft Word, there is also an option to create a PDF file from the **File** toolbar. This option bypasses the print dialog box and saves a step. From the **File** menu, select **Create Adobe PDF**, then click on **Print via PDFWriter**. Follow the steps outlined above to complete the creation of the PDF file. All of the other steps are the same.
- C. Scan any attachments or exhibits that are in paper form.
- 1. *Any scanner and scanning software is acceptable to the Court as long as the result is usable by our Electronic Records System. However, the Court cannot offer technical support for scanning software. The Court uses Visioneer PaperPort Strobe scanners and PaperPort software.*
  - 2. Set the scanning resolution (black and white) at 300 dots-per-inch (dpi).
  - 3. Convert the image to PDF using the **Print** function from the **File** menu. Alternatively, save the image to your word processor (WordPerfect or Word). Use the **Print** function to convert the image to PDF.
- D. Combine the documents into a single PDF file.
- 1. Open the "lead" document, e.g., if the filing were a motion, the first document in the filing would be the Notice of Motion and Motion which you just saved in PDF. ***It is extremely important that you insert the documents in your single PDF file in the same order as they would appear in a paper filing!*** From the **File** menu, click **Open**.
  - 2. Select the "lead" document. Click **Open**.
  - 3. With the "lead" document on your screen, the other documents must be inserted ***in proper sequence!*** From the **Document** menu, click **Insert Pages**. *Do not choose **Open** again, because that would open a new document window.*
  - 4. In the **Select File To Insert** dialog box, highlight the document you want to insert and click **Select**.
  - 5. In the **Insert** dialog box, for the **Location** option, click on the **After** radio button. For the **Page** option, click on the **Last** radio button. Always choose to insert **After** the **Last** page to ensure that your documents are inserted in the correct order.
  - 6. Continue to insert the other documents that make up your filing. ***Please be sure you insert the documents in the proper sequence!***
  - 7. *Always insert the **Proposed Order**, if there is one, as the last document in your filing. This ensures that case administrators and the judges can easily access the Proposed Order. When all the documents have been correctly inserted, the Proposed Order, if there is one, should be the last document.*
  - 8. Save the combined documents as a single PDF file. From the **File** menu, select **Save As**.
  - 9. In the **Save As** dialog box, choose a name for the unified file.
  - 10. If you wish to print the file for your own use, open the **File** menu, and select **Print**. Make sure your local printer is selected. Specify the page range, then click **OK**.

11. Save the combined PDF file containing the filing to a diskette.
  - a. Insert your IBM format 3.5 inch 144 megabyte diskette into your computer.
  - b. Open the combined PDF file containing the filing.
  - c. From the **File** menu, click on **Save As**. In the Save As dialog box, in the **Save in** box, choose drive **A:**. Click **OK**.
  - d. Label the diskette with the following information:
 

<i>Attorney Name</i>	<i>Attorney Telephone No.</i>
<i>Debtor's Last Name</i>	<i>Case Number &amp; Judge's Initials, if known</i>
<i>Document Type: (e.g., motion, response, petition, complaint, etc.)</i>	
12. Send the diskette to the appropriate office of the Clerk of Bankruptcy Court.

II. Step-by-step instructions for filing a **New Bankruptcy Case** on diskette

*These instructions apply to a petition under any chapter.*

- A. Prepare the petition and schedules using your bankruptcy petition preparation software.
- B. Scan any exhibits to the petition, schedules and statements and convert them to PDF using the **Print** function from the **File** menu.
- C. Combine the petition, schedules, statements and any exhibits into a single PDF file. See the procedures in I.D. for instructions.
- D. Save the matrix in text (TXT) format according to the requirements of your bankruptcy software package.
- E. Prepare the chapter 13 plan, if applicable, and convert it to PDF.
- F. Prepare the form, *Declaration re: Electronic Filing* (the signature declaration form) and have the debtor(s) sign it.
- G. Scan the signed signature declaration form and convert the image to PDF. This must be a separate document from the petition and schedules. Alternatively, save the image of the signature declaration form to your word processor (WordPerfect or Word). Use the **Print** function to convert the image to PDF. Again, the signature declaration form should be separate from the petition and schedules.
- H. Save the combined PDF file containing the petition, schedules, statements and any exhibits to a diskette.
  1. Insert your IBM format 3.5 inch 144 megabyte diskette into your computer.
  2. Open the combined PDF file containing the petition and schedules.
  3. From the **File** menu, click on **Save As**. In the Save As dialog box, in the **Save in** box, choose drive **A:**. Click **OK**.
- I. Save the matrix to the same diskette, following the instructions in II.H.
- J. If applicable, save the PDF file containing the chapter 13 plan to the same diskette, following the instructions in II.H.
- K. Save the PDF file containing the signature declaration form to the same diskette, following the instructions in II.H.
- L. Label and diskette, providing the following information:
 

<i>Attorney Name</i>	<i>Attorney Telephone No.</i>
<i>Debtor's Last Name</i>	<i>Case Number &amp; Judge's Initials, if known</i>
<i>Document Type: (e.g., motion, response, petition, complaint, etc.)</i>	
- M. Prepare the Statement of Social Security Number **in paper form** (available on the court's website under What's New, New Privacy-Related Changes) and have the debtor(s) sign it.
- N. Send the diskette and the completed **paper** Statement of Social Security Number to the appropriate office of the Clerk of Bankruptcy Court