



EZ FILING[®]

The Smarter Bankruptcy Software[™]

Getting Started Guide



Smarter Software

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Version 2010

The v2010 CD includes the latest release of EZ-Filing® and two free and fully functional complimentary applications: Ticket-In/Ticket-Out™ and Notice Me™. These applications work in tandem with EZ-Filing to streamline the process of preparing and filing bankruptcy cases for your clients.

- Use *Ticket-In/Ticket-Out* to register clients for credit counseling or debtor education, to automatically monitor when the client completes a course, and to download the certificates.
- Once credit counseling is complete, use *EZ-Filing* to prepare and file the client case.
- After filing, use *Notice Me* to automatically download and manage court notices for each of your clients.
- Then, use *Ticket-In/Ticket-Out* again to enroll the client in debtor education and automatically download the certificate.



Information in this guide

- See [EZ-Filing on page 7](#) to install or upgrade the bankruptcy software.
- See [Ticket-In/Ticket-Out on page 17](#) to install the automated credit counseling/debtor education enrolling and monitoring tool.
- See [Notice Me on page 19](#) to install the automated court notice management tool and set up the required Google mail account.

Note: EZ-Filing does not provide technical support for setting up and maintaining your Google mail (Gmail) account for Notice Me. To troubleshoot Gmail issues, see the Google Help Center at <http://mail.google.com/support/>



EZ-Filing

Use these guidelines to upgrade your version of EZ-Filing, to install and set up EZ-Filing for the first time, and for information on contacting Technical Support or accessing the new EZ-Filing Support FAQs site.

Upgrading your version of EZ-Filing

If you already have a previous version of EZ-Filing installed, use this procedure to upgrade to v2010.

- 1** Shut down EZ-Filing. In the main menu, select **File>Exit**.
- 2** Insert the CD into the CD/DVD drive.

3 Do either of the following:

If AutoPlay is set for your drive:	If AutoPlay is not set for your drive:
Click Run 2010Installer.exe to launch the wizard.	<p>a Open the Run dialog box. Depending on your version of Windows, do one of the following:</p> <ul style="list-style-type: none"> • In the Windows Start menu, click Run. • Press Win+R. <p>b In the Windows Run dialog box, click Browse.</p> <p>c In the Windows Browse dialog box:</p> <ol style="list-style-type: none"> 1 Navigate to the 2010Installer.exe on the CD or DVD drive. 2 Select the 2010Installer.exe file, and click Open. <p>d In the Run dialog, click OK to launch the wizard.</p>

3 On the start page, click **EZ-Filing v. 2010** to launch the wizard.

4 Follow the instructions in the wizard to complete the upgrade.

The wizard informs you when EZ-Filing has been successfully installed.

Installing and setting up EZ-Filing for the first time

Verifying system requirements

Before beginning the installation process, verify the following minimum requirements:

- Pentium or Pentium-equivalent processor
- 512MB of RAM (1GB recommended)
- Windows® 7, Vista, or XP operating system

- 250MB of available hard-disk space (500MB recommended)
- High-speed Internet connection is required for electronic case filing (ECF) and automatic updates. See additional requirements below.
- Windows-compatible printer

ECF system requirements

- 17-inch monitor with a resolution of 800x600 pixels (1024x768 recommended)
- Internet Explorer (IE) 5.5 or higher to use the automatic upload feature (for those districts that allow automatic uploading). Latest version of IE is recommended.

Installing the Basic or Professional Package

- 1 Insert the CD into the CD/DVD drive.
- 2 Do either of the following:

If AutoPlay is set for your drive:	If AutoPlay is not set for your drive:
<p>Click Run 2010Installer.exe to launch the wizard.</p>	<p>a Open the Run dialog box. Depending on your version of Windows, do one of the following:</p> <ul style="list-style-type: none"> • In the Windows Start menu, click Run. • Press Win+R. <p>b In the Windows Run dialog box, click Browse.</p> <p>c In the Windows Browse dialog box:</p> <ol style="list-style-type: none"> 1 Navigate to the 2010Installer.exe on the CD or DVD drive. 2 Select the 2010Installer.exe file, and click Open. <p>d In the Run dialog, click OK to launch the wizard.</p>

- 3 On the start page, click **EZ-Filing v. 2010** to launch the wizard.

- 4 Follow the instructions in the wizard to complete the installation.

The wizard informs you when EZ-Filing has been successfully installed.

Installing the Network Pro Package

To install the Network Pro Package, you need first to install EZ-Filing on your server and then create a desktop shortcut to the installation from each workstation that you want to access EZ-Filing.

To install EZ-Filing on your server

- 1 Insert the CD into the CD/DVD drive.
- 2 Do either of the following:

If AutoPlay is set for your drive:	If AutoPlay is not set for your drive:
<p>Click Run 2010Installer.exe to launch the wizard.</p>	<ol style="list-style-type: none"> a Open the Run dialog box. Depending on your version of Windows, do one of the following: <ul style="list-style-type: none"> • In the Windows Start menu, click Run. • Press Win+R. b In the Windows Run dialog box, click Browse. c In the Windows Browse dialog box: <ol style="list-style-type: none"> 1 Navigate to the 2010Installer.exe on the CD or DVD drive. 2 Select the 2010Installer.exe file, and click Open. d In the Run dialog, click OK to launch the wizard.

- 3 On the start page, click **EZ-Filing v. 2010** to launch the wizard.
- 4 On the **Destination Folder** page, make note of the destination directory pathname. You will need it when you create shortcuts on the workstations to run EZ-Filing. The default installation directory is *C:\Program Files\EZ-Filing*.

- 5 Follow the instructions in the wizard to complete the installation.


The wizard informs you when EZ-Filing has been successfully installed.

To create desktop shortcuts on workstations

- 1 On the workstation's desktop, right-click anywhere there is not already an icon.
- 2 In the menu that appears, select **New>Shortcut**.
- 3 In the **Create Shortcut** window, click **Browse**.
- 4 Navigate to the **ezfiling.exe** file in the EZ-Filing installation directory.
The default installation path is *C:\Program Files\EZ-Filing\ezfiling.exe*.
- 5 Select **ezfiling.exe**, and click **OK** to place the path in the **Create Shortcut** window.
- 6 Click **Next** to continue.
- 7 In the **Type a name for this shortcut** field, type **EZ-Filing**.
- 8 Click **Finish** to create the shortcut and display it on the workstation desktop.
- 9 Repeat this procedure for every workstation in the network.

Setting up EZ-Filing

When you launch EZ-Filing for the first time, a series of windows will prompt you for information that EZ-Filing uses when creating case forms.

- 1 Double-click the **EZ-Filing** shortcut  on your desktop.
The EZ-Filing **Welcome** window appears.
- 2 Read the **Welcome** window, and click **Next**.
- 3 Fill out the **Tell Us About Yourself** window:
 - a In the **I am a(n) ...** area, select one of the following:
 - Select **Both** if you are an attorney or an employee of an attorney who practices in a district that allows the attorney to also act as a preparer.
 - Select **Attorney** if you are an attorney who *never* acts in the role of non-attorney preparer nor are an employee of an attorney who represents the clients whose cases you prepare.

Note: If additional attorneys practice at your firm, you can add them using the guidelines following this procedure.

- Select **Preparer** if you are not an attorney nor an employee of an attorney who represents the clients whose cases you prepare.

b In the **I Practice in the State of...** list, select the home state of your practice.

Note: If you practice in more than one state, you can activate additional states using the guidelines following this procedure.

c Click **Next**.

4 Do one of the following:.

If you selected Attorney in step 3a:	If you selected Preparer in step 3a:	If you selected Both in step 3a:
<p>a Fill out the Law Firm Information window and click Next.</p> <p>b Fill out the Attorney Information window and click Next.</p>	<p>a Fill out the Preparer Information window and click Next.</p>	<p>a Fill out the Law Firm Information window and click Next.</p> <p>b Fill out the Attorney Information window and click Next.</p> <p>c Fill out the Preparer Information window and click Next.</p>

5 Read the **Thank You** window and click **Finish**.

The EZ-Filing program launches and is ready for use.

To activate additional states


You need to activate additional states

- if any attorney at your firm practices in more than one state.
- if the debtors lived in more than one state during the two years prior to filing
The BAPCPA requires debtors to use the exemptions statutes for all such states during that time period, so you must activate the states to make those exemption statutes available.


- 1 Click **System > Activate New State**.
- 2 In the **Activate New State** window, select the state you want to add.
- 3 Click **Activate** to add the state and close the **Activate New State** window.
- 4 To add another state, repeat this procedure.

To add attorneys and setting up electronic case filing

If additional attorneys practice at your firm, you need to add them as well.

- 1 In the main menu, select **System > Attorneys**.
- 2 In the **Attorneys** window, click  to open the **Add Attorney** window.
- 3 On the **Attorney** tab, type the attorney's **Name** and **E-Mail Address**.
- 4 Type the **State Bar** number for the state in which the attorney primarily files bankruptcy cases.

*Note: If the attorney files in the Eastern District of Missouri and if the bar number you entered in step 4 is a Missouri bar number, enter the attorney's registration number for the United States District Court for the Eastern District of Missouri in the **District Court** box.*

- 5 If the attorney files bankruptcy cases in multiple states:
 - a In the **Specific States Overrides** area, click .
 - b Type the abbreviation for an additional **State**.
 - c Type the attorney's **Bar Number** for the state you entered in step b.
 - d If the attorney practices in more than two states, repeat steps a–c.
- 6 To set up the ECF login information, select the **Login** tab.
- 7 In the **CM/ECF** area, select the **Jurisdiction** for which you want to enter ECF information.
 - a Select whether you want CM-ECF® to access the **Training** system or the **Live** system web page for the attorney.
 - b In the **Url** text box, enter the Internet address for the web page you want CM-ECF to open.
 - c Enter the attorney's ECF **Login** and **Password**.

- d If you want to set up the attorney's ECF information for another district, repeat steps a-c.
- 8 In the **Pacer** area, enter attorney's Pacer **Login** and **Password**.
- 9 Click **OK** to save your information and close the window.

Setting EZ-Filing preferences

If you need to further tailor EZ-Filing to meet your business or system needs, you can set preferences for any number of setup options.

- 1 In the main menu, select **System > Preferences**.
- 2 In the **Preferences** window, select the preference you want to set from the **Options** list.
- 3 Press **F1** for more information on setting each type of preference.

Using the EZ-Filing help

Once you've set up EZ-Filing, you are ready to start preparing bankruptcy cases. If you are new to EZ-Filing, use the online Help to assist you in this process.

To access the online help, do one of the following:

- To view the Help table of contents, select **Help > EZ-Filing Help** in the main menu.
- To view context-sensitive Help, press **F1** from any EZ-Filing window.

Contacting Technical Support

Your license of EZ-Filing includes toll-free priority telephone support.

- You can reach the technical support staff of EZ-Filing, Inc., Monday through Friday between 8:00 AM and 4:30 PM Mountain Time at 1-800-998-2424.
- You can also e-mail techsupport@ezfiling.com.
When sending a message, please include
 - your name
 - your Customer ID number
 - the version of Windows installed on the computer you're using
 - your question
 - any other information that you feel might be of assistance in resolving the issue (like changes to your system, such as a new printer)

Note: This contact information is available in the footer of any page of the EZ-Filing online help.

Using the EZ-Filing Support FAQs site

In addition to phone support, the *EZ-Filing Support FAQs* website is available to all customers. It provides:

- 24X7 access to a knowledge base of over 500 existing questions and answers, through keyword search or by browsing the knowledge base by product category or subcategory
- Submission of troubleshooting and other user-specific questions to the EZ-Filing Tech Support team, with a maximum response turnaround time of 2 business days
- Attachment of client files and any other pertinent files to your question
- Answers that come directly to your email Inbox

To access EZ-Filing Support FAQs:

In the main menu, select **Help>EZ-Filing Support FAQs**.

Note: Direct access to the website is available at <http://support.ezfiling.com>



Ticket-In/Ticket-Out

Ticket-In/Ticket Out™ automates the process of getting credit counseling and debtor education for your clients. During the initial client interview, you register the debtor for credit counseling with a participating bankruptcy counseling partner, such as CIN Legal Data Services. You simply submit the client's name and social security number and receive a registration number with client instructions.

Then, every night, Ticket-In/Ticket Out will automatically check the status of the client you have enrolled, providing you with an Event log and To-Do list the next morning. Once course requirements have been met, the software automatically downloads the ready-to-attach certificate (*no scanning required*). Ticket-In/Ticket Out also warns you when your client's completion certificate is nearing its expiration date.

Use these guidelines to install a fully functional complimentary copy of Ticket-In/Ticket Out.

Installing Ticket-In/Ticket-Out

- 1** On the start page, click **Ticket-In/Ticket-Out** to launch the wizard.
- 2** Follow the instructions in the wizard to complete the installation.

The wizard informs you when Ticket-In/Ticket/Out has been successfully installed.

Using the Ticket-In/Ticket-Out help

Use the Ticket-In/Ticket-Out help to enroll and monitor clients in credit counseling and debtor education.

- 1 Launch Ticket-In/Ticket-Out.
- 2 In the left menu, expand the **Help** menu, and click **How to...**
- 3 Use the online help to do any of the following:
 - Add or manage clients
 - Manage credit counseling or debtor education events
 - Check for product updates
 - Edit the Ticket-In/Ticket-Out setup



Notice Me

Notice Me[™] automatically downloads your court notices and free-look documents and saves them to your desktop, laptop, or mobile device for later review. Further, *Notice Me* can post court notification event dates to your electronic calendar and alert you when you have an actionable date.

- It regularly monitors your Gmail account for court notices based on a schedule that you define
- It sorts, organizes, and files court notices by case name in a location that you specify
- It posts court event notification dates for 341 Meetings, Section 521 Incomplete Filings, Stay Hearings and others to any electronic calendar that is compatible with Google
- It facilitates the optimal use of "free looks" by providing instant access to the viewing and printing of any filed document
- It sends out e-mail, pop-up, and text message reminders to occur as often as you like
- It allows for the execution of manual downloads in between your scheduled downloads when you are waiting for a specific court notice for a client case.

Note: Notice Me only works in districts that send one email per case document. If your district sends digest or summary emails, Notice Me will not be able to deliver case documents from your Gmail account.

Note: EZ-Filing does not provide technical support for setting up and maintaining your Google mail (Gmail) account for Notice Me. To troubleshoot Gmail issues, see the Google Help Center at <http://mail.google.com/support/>

Use these guidelines to install a fully functional complimentary copy for the first time.

Installing and setting up Notice Me

Verifying system requirements

Before installing Notice Me, verify the following system requirements:

- Windows® 7, Vista, or XP operating system
- Minimum of 1MB of available hard-disk space per client case
- High-speed Internet connection

Running the Notice Me installer

To install the application, use your Notice Me serial number if you are a previous customer of Notice Me, or your EZ-Filing Customer ID if you just purchased a license for EZ-Filing.

- 1** On the start page, click **Notice Me** to launch the wizard.
- 2** On the **Setup Wizard Complete** page, do the following:
 - If you are installing Notice Me for the first time, uncheck **Synchronize the database with my current install**
Note: If you need to synchronize your database at a later time, see the *Notice Me online help* for more information.
 - If you want to launch Notice Me, check-mark **Start Notice Me**.
- 3** Click **Finish** to complete the installation and exit the wizard.

The wizard informs you when Notice Me has been successfully installed.

Note: At any future time, when you shut down and restart your computer, there is no need to exit or restart Notice Me. It will do so automatically.

Setting up the required Google mail account

Notice Me requires a Google mail (Gmail) account to work. You have two options for setting up your Gmail account:

- If you have an existing Gmail account that you use as your primary account, you only need to enable IMAP on the account.

- If you have an existing Gmail account and want to create another dedicated Gmail account for Notice Me, you need to create the new account and enable IMAP on the new account. You can also, optionally, transfer the new Gmail calendar to a preferred calendar on your primary account so that your calendar entries are viewable in one calendar.

Note: EZ-Filing does not provide technical support for setting up and maintaining your Google mail (Gmail) account for Notice Me or transferring the new Gmail calendar to a preferred calendar on your primary Gmail account. To troubleshoot these issues, see the Google Help Center at <http://mail.google.com/support/>

To use an existing Gmail account and enable IMAP on the account

- 1 Sign in to your existing Gmail account.
- 2 In the **Gmail** window, click **Settings**, then select the **Forwarding and POP/IMAP** tab.
- 3 In **IMAP Access** area, select **Enable IMAP**.
- 4 Click **Save Changes** to close the window.



To create a new Gmail account and enable IMAP on the account

- 1 In your Web browser, go to <http://www.google.com>
- 2 In the Web bar, click **Gmail**.
- 3 Click **Create an account** and follow the instructions to open a new account.
- 4 When you have successfully signed up for Gmail, click **Show me my account**.
 - Make a note of this user name and password, as you will need this information when setting up Notice Me. See “Setting up Notice Me” on page 22 for more information.
 - Notify your bankruptcy court(s) of your new Gmail account address for receiving court notices.
- 5 In the upper right corner of the Gmail window, click **Settings**, then select the **Forwarding and POP/IMAP** tab.
- 6 In **IMAP Access** area, select **Enable IMAP**.
- 7 Click **Save Changes** to close the window.


Setting up Notice Me

Next, you need to set up Notice Me to work with your Gmail account.

Note: EZ-Filing does not provide technical support for setting up and maintaining your Google mail (Gmail) account for Notice Me. To troubleshoot Gmail issues, see the Google Help Center at <http://mail.google.com/support/>

- 1 If you haven't already, launch Notice Me.
- 2 In the lower-right corner of your screen, right-click , and select **Notice Me Setup**.
- 3 In the upper-right corner of the **Notice Me Setup** window, click **?** and follow the instructions in the help to complete the fields in the **Notice Me Setup** window.
- 4 If your Notice Me test is successful, Notice Me will run in the background.
- 5 To set up custom events notifications or do other work in the application, right-click  in the system tray to display the product menu and make another selection.

Using the Notice Me help

- 1 Launch Notice Me.
- 2 Right-click , and select **Notice Me Setup**.
- 3 In the upper-right corner, click ? to open the help.
- 4 Use the online help to do any of the following:
 - Edit your Notice Me setup
 - Manage event notifications
 - View court notices
 - Upgrade Notice Me

