13 DOCUMENTS

Getting Started

13 Documents is a secure file transfer service provided by your Trustee to receive various documents in a secure manner.

Your Trustee may request any document type to be submitted through 13 Documents, however, common documents types are:

- *Bank Statements*

- *Tax Returns*

- *Mortgage Documents*

WHAT IS 13 DOCUMENTS

13 Documents provides a secure, encrypted, method of transfer from your computer to the Trustee's system. Documents which may contain sensitive information are protected against unauthorized access using 13 Documents.

Email is unsecure and can be easily compromised. Further, email can, and often is, retained by your service provider for some period. This exposes sensitive data to unauthorized parties.

WHY 13 DOCUMENTS?
ISN'T EMAIL SUFFICIENT?
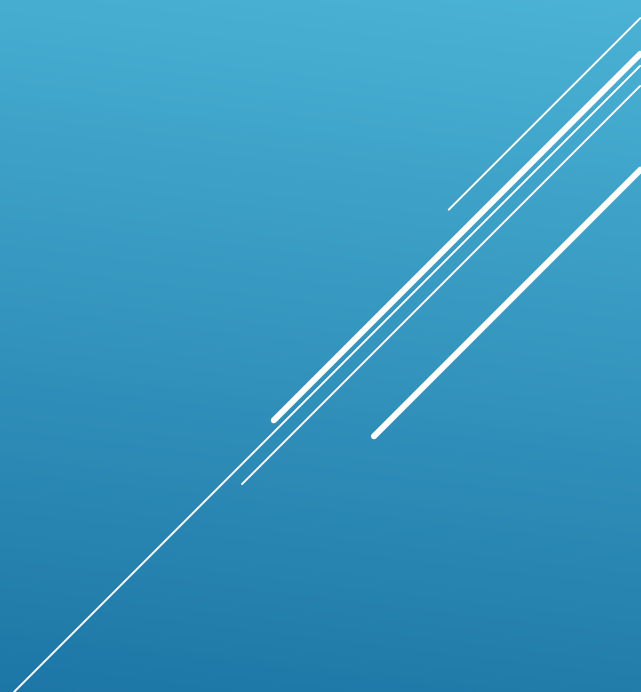
Your Trustee will provide additional details on when s/he will begin implementing the service for general use.

WHEN DO I NEED TO USE 13 DOCUMENTS?
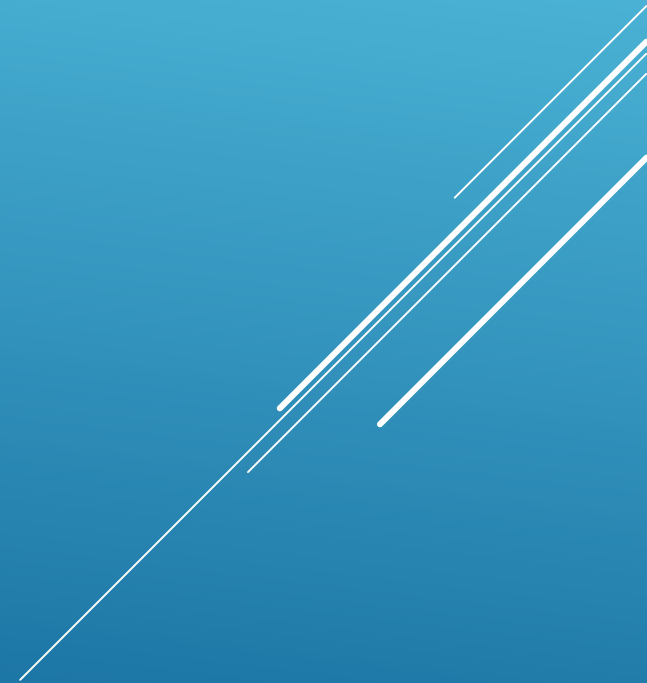
The following slides will provide a general overview of 13 Documents, how to register, request upload permission, upload documents, view document upload history, and more.

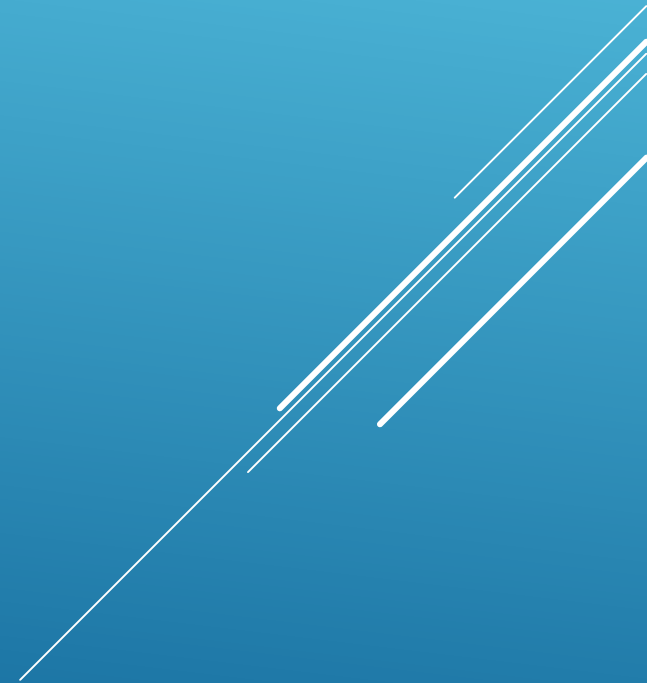Your Trustee may provide additional information on using 13 Documents.

HOW DO I USE 13 DOCUMENTS?

- Introduction completed.
- Next: Let's get registered!

SECTION COMPLETE
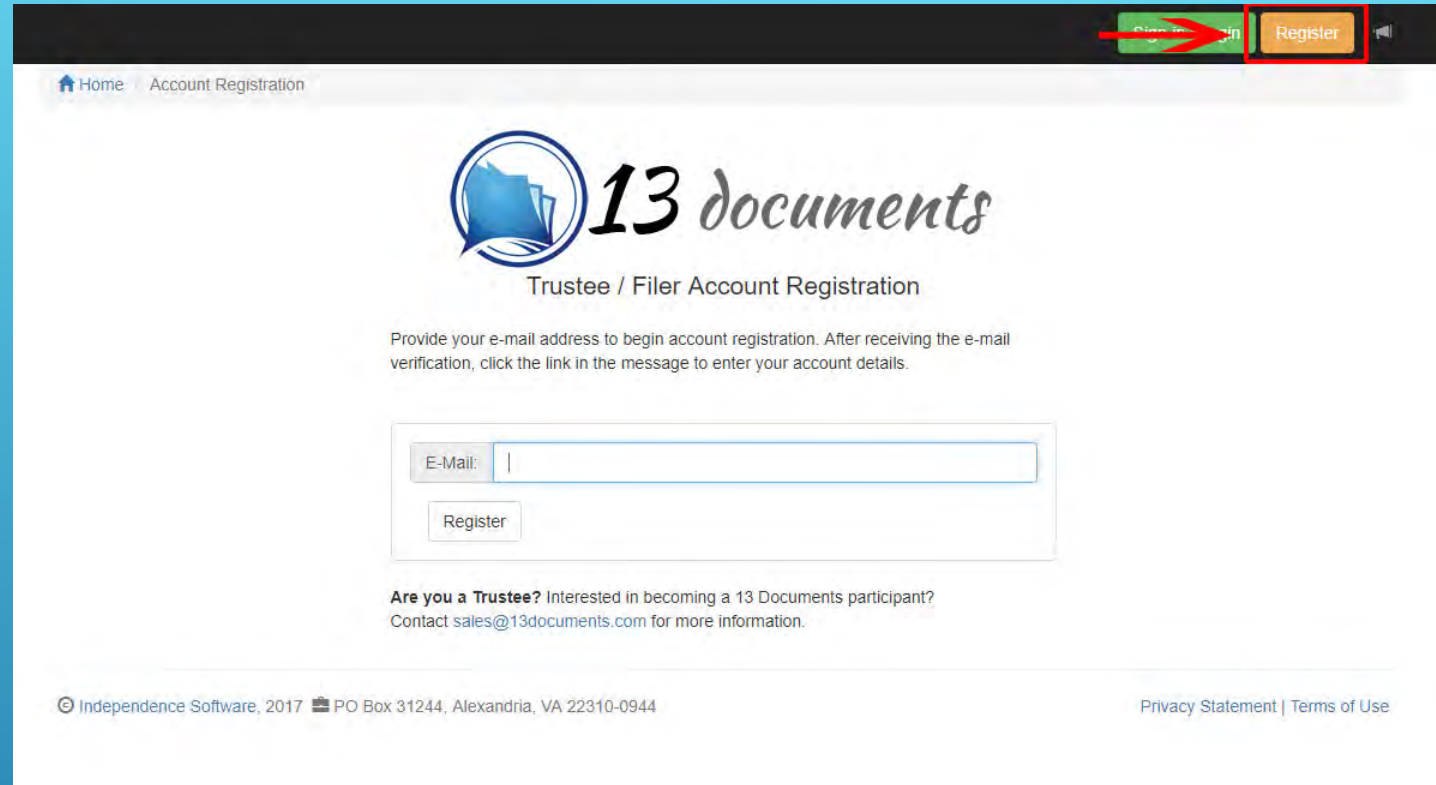
USING 13 DOCUMENTS REGISTRATION

User Registration and User Login

To begin your registration for 13 Documents, enter your email address on the registration page.

Access the registration page by clicking "Register" from any page on the 13documents.com site.

BEGINNING REGISTRATION

Clicking "Register" will generate an email containing a validation link.

You MUST click the validation link to complete your registration.

Your validation email is sent immediately. If not displayed in your Inbox after 5 minutes, check your SPAM/Junk folders.

VALIDATING YOUR REGISTRATION

If you enter an email address which Already exists in the 13 Documents software, you will be notified.

If you did not attempt to register previously and believe this message is in error, please contact 13 Documents support.

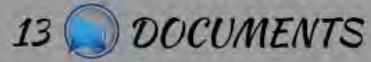support@13documents.com

ACCOUNT ALREADY EXISTS
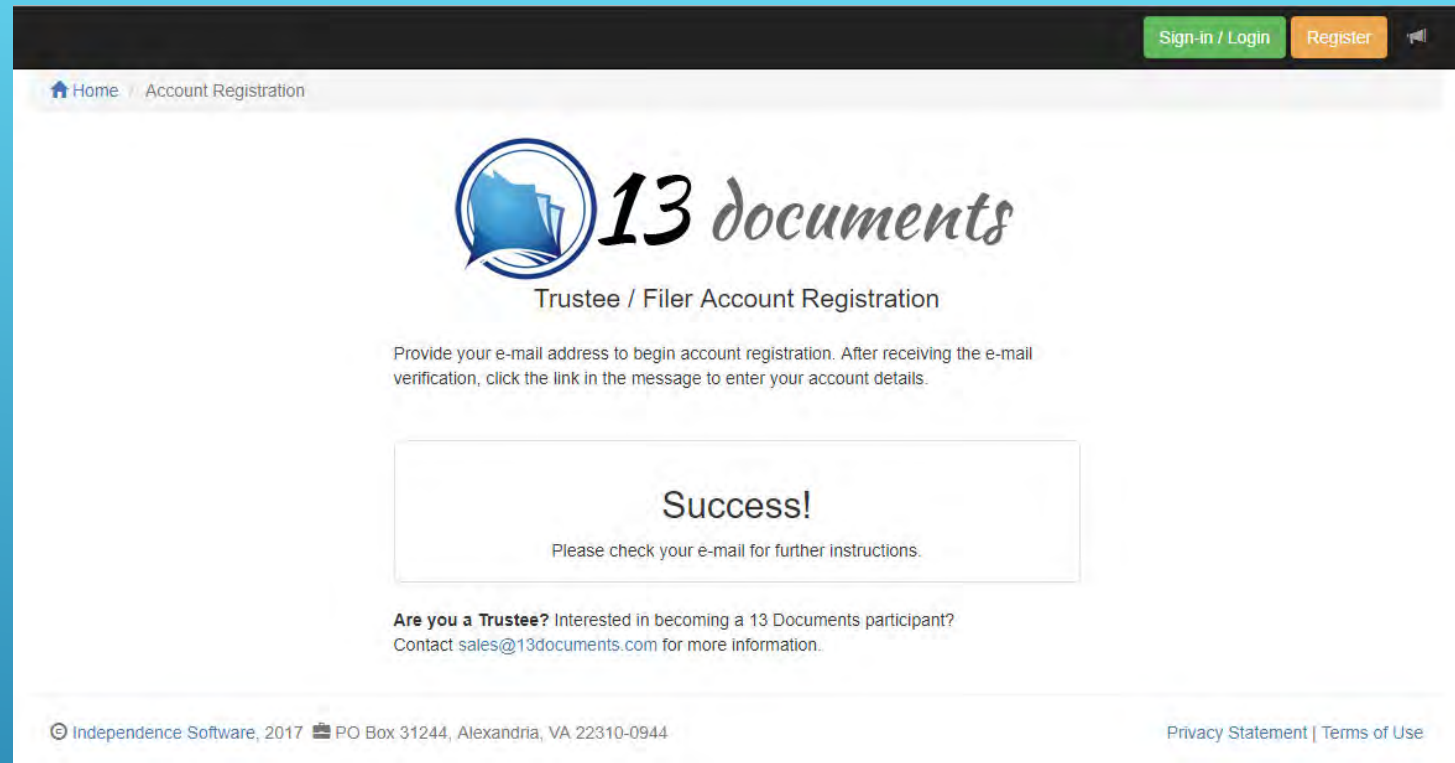
Your email address has been registered. An email will be sent with validation instructions.

REGISTRATION SUCCESS

VALIDATION EMAIL EXAMPLE

- Clicking "Activate Now" from the Validation Email will prompt you to complete your account information.

- All fields, except "Company / Firm", are required.

- Fields with a red border require attention.

- Click "Update" when all required fields have been completed.
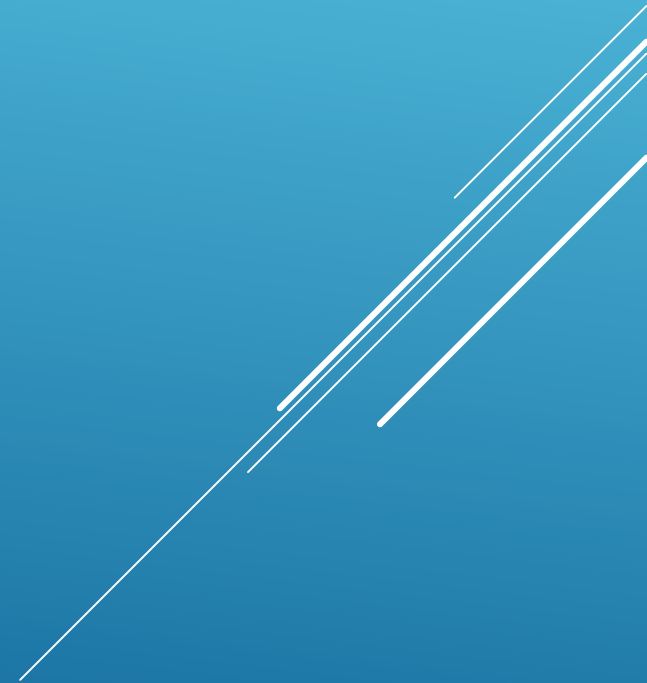
REGISTRATION ACCOUNT DETAILS

COMPLETE REGISTRATION

- Your registration is complete.

- **Clicking "Request Trustee Access" will direct you to the Trustee Authorizations page.**
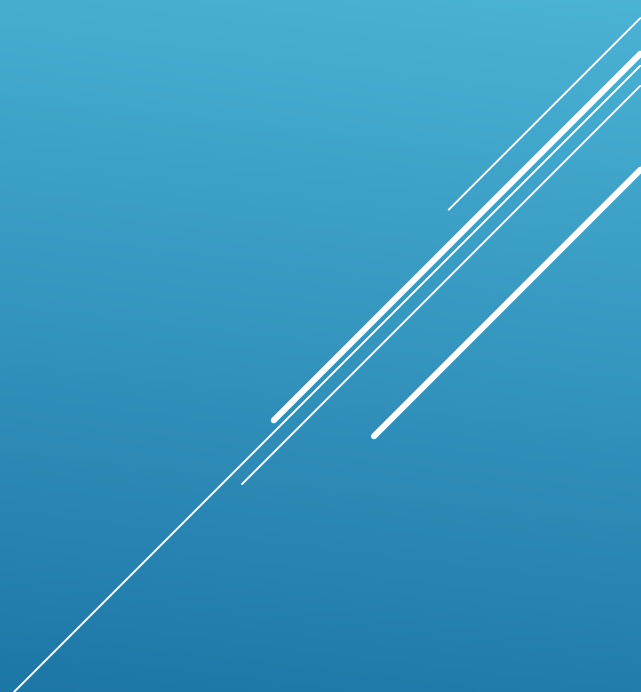
- Your registration is complete!
- Next: Request access to upload documents to your Trustee(s).

SECTION COMPLETE

USING 13 DOCUMENTS TRUSTEE ACCESS REQUESTS

Requesting Permission to Upload Documents

REQUEST UPLOAD PERMISSION TRUSTEE AUTHORIZATIONS

13 DOCUMENTS

Justin Crone

Logout

You are: Home > Trustee Authorizations

Logged in approximately: less than a minute ago

Home

Document Upload

Trustee Authorizations

Documents Report

Document Inbox

Account

HELP

Trustee Authorizations

You must be authorized to upload a document. You may request permission from multiple Trustees. Your request will be sent to the Trustee and you will be informed when your request has been approved.

| Trustee	Request Status
Joyce Bradley Babin	Request
Isabel C. Balboa	Request
Pam Bassel	Request
Russell Brown	Request
Margaret A. Burks	Request
Andrea E. Kehl	Request
Amrane Cohen (Santa Ana)	Request
Annette C. Crawford	Request
Melissa J. Davey	Request
Faye D. English	Request

Click "Request" next to the Trustee(s) name(s) for whom you would like to upload documents.

CHOOSE YOUR TRUSTEE(S)

Once approved, the Trustee(s) name(s) will be highlighted in green.
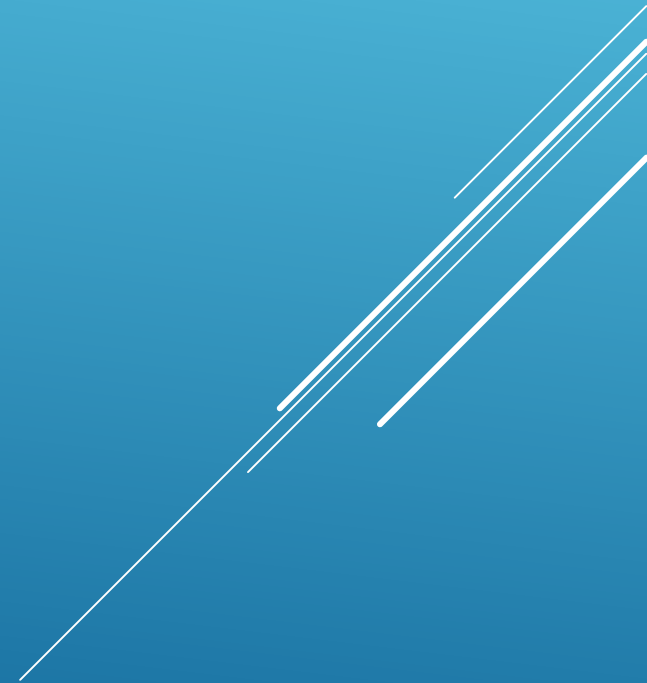
APPROVED BY TRUSTEE(S)
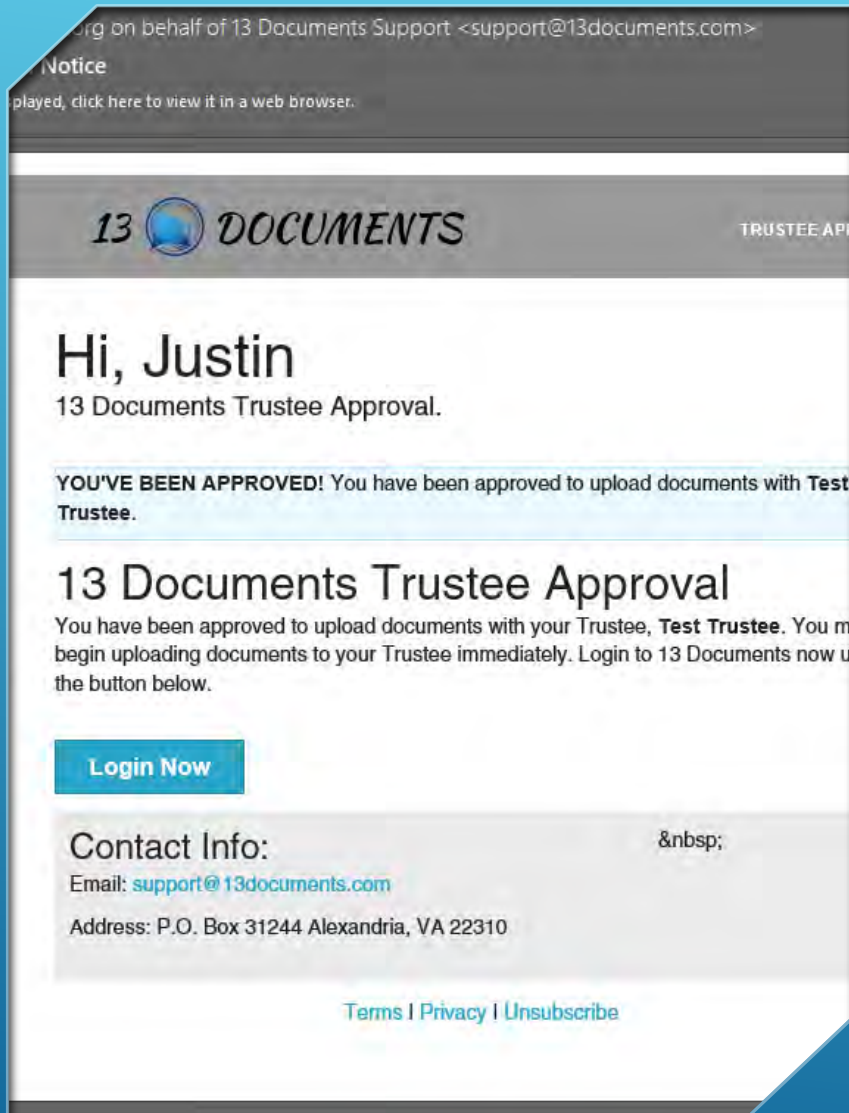
AN APPROVAL NOTICE

An email notice will be sent once you've been approved by your Trustee(s).

- Once approved by your Trustee(s) you can begin uploading documents.
- Next: Document uploads.

SECTION COMPLETE

USING 13 DOCUMENTS UPLOAD

Uploading Documents to the Trustee

- Documents must be in Adobe Acrobat (PDF) format.
  - Your Trustee(s) may allow additional formats.
- Maximum file size for a single document is limited to 10mb (megabytes).
  - Your Trustee(s) may allow larger file sizes.
- You must have a valid case number to upload a document.
- Your Trustee(s) may limit you to cases which you are a party-in-interest.
- A maximum of 10 documents/files may be upload in a single batch.

UPLOAD BASICS

UPLOAD FORM STEP 1&2

The document upload form has multiple steps. First we'll discuss step 1 and 2.

- Choosing your Trustee
- Fillable Forms
- Remove Default
- Trustee MOTD (Message Of The Day)
- File Selection

- Once selected, your chosen Trustee becomes your default.
- Click "Remove Default" to change your Trustee.
  - *If available, you may notice "Fillable Forms Available". Your Trustee will provide details on how to use available Fillable Forms.*

CHOOSE YOUR TRUSTEE STEP 1

MOTD
(MESSAGE OF THE DAY)

- Your Trustee may provide a MOTD to display important information.

- If provided, the MOTD will appear below the Trustee selection box.

- Contact your Trustee with any questions regarding the MOTD.

- You may attach up to 10 documents per batch for upload.

- You will assign a case number and document type for each document in the batch.
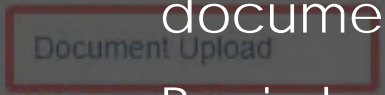
- Begin by clicking the "Browse" button or dragging & dropping your files onto the outlined area.

ATTACHING FILES (DOCUMENTS)
STEP 2

- Your file name will appear in the title bar. Until all fields have been completed, the title bar will be shaded yellow.

- You must enter:

  - *Valid case number*

  - *Choose a document type which matches the type of document you have attached.*

IDENTIFY YOUR FILE(S)
STEP 3

- ✓ Case number has been validated.
- ✓ Document type has been selected.
- ✓ Optionally, a description for the Trustee has been provided (descriptions may be required for some document types).

To upload your document(s), you must read and agree to the redaction rules provided by your Trustee.

ATTACHMENT COMPLETED

Once the redaction message has been accepted, click "Send File(s)…" to upload your document(s) to the Trustee!

Clicking "Reset" will remove all document(s) from your batch.

FINISH, SEND FILE(S)…

Your upload has been completed. If an error occurred during your upload, a message would be displayed below the progress bar with a description of the issue.

Clicking the serial number will display an upload receipt. (THIS RECEIPT CONFIRMS THE DOCUMENT HAS BEEN RECEVIED BY 13 DOCUMENT, NOT YOUR TRUSTEE.)

UPLOAD COMPLETED

Your document receipt will contain:

- Your file name
- Date/time received by 13 Documents
- Document type selected
- Who uploaded the document
- The Trustee which was chosen

RECEIPT EXAMPLE

- Your document has been accepted!
- Next: Document History

SECTION COMPLETE

USING 13 DOCUMENTS DOCUMENT HISTORY

Viewing Document History

Your upload history contains a list of documents uploaded.

VIEWING YOUR UPLOAD HISTORY

- Case number: The case number which the document is associated with.

- Received: Date & time the document was received by 13 Documents (adjusted for local time zone).

- Download: Date & time the document was downloaded by the Trustee (if date & time is all zeros, the Trustee has disabled display of this field).

- Type: The document type assigned during upload.

DOCUMENT HISTORY EXPLAINED

13 Documents | Filer Account

Case	Received	Download	Type
1732305	2018-07-21 12:37:18	0000-00-00 00:00:00	Other - Miscellaneous

- Trustee: Displays the name of the Trustee the document was assigned to.

- Serial Number: The serial number generated for this document. Can be used for tracking purposes.

- Size: The size of the file uploaded.

- Comment: If provided during upload, will be displayed.

- Original Filename: The file name of the document on your computer which was used for upload.

DOCUMENT HISTORY EXPLAINED (CONT.)

Trustee	Serial Number	Size	Comment	Original Filename
Test Trustee	DOC130000000001090476	124213 KB		0_1732305_2290_Other.pdf

- Completed: Document History
- Next: Document Exchange
  - Available in the August 2018 update

SECTION COMPLETE

USING 13 DOCUMENTS DOCUMENT INBOX

What is "Document Inbox"?

DOCUMENT(S) AVAILABLE
SENT BY YOUR TRUSTEE(S)

Document Inbox

This is your Document Inbox. Documents provided by the Trustee will be displayed here. You may download or print these documents. Some documents have an expiration set by the Trustee, if a document has an expiration, the file will be available to view/print until the expiration date has passed.

Show [100 ▼] entries   Search: [   ]

Case	Received	Trustee	
1732305	07/21/2018 1:09 PM	Test Trustee	View
Case	Received	Trustee	

Showing 1 to 1 of 1 entries
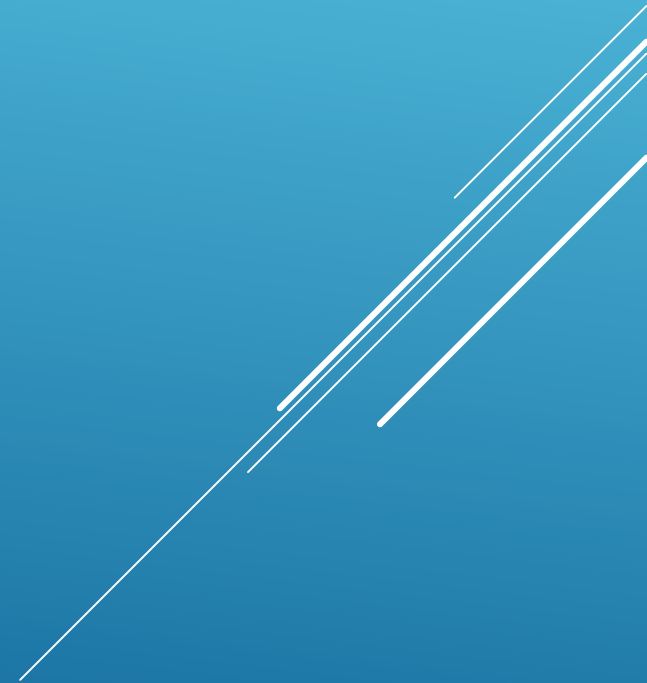
[Previous] [Next]

- ▶ Documents which have been sent by your Trustee(s) will be available through Document Exchange.

- ▶ You may view your documents by clicking "View".

- ▶ Documents may expire after viewed. Contact your Trustee for details.

VIEW AVAILABLE DOCUMENT(S)

- Completed: Document Exchange
- Next: Account

SECTION COMPLETE

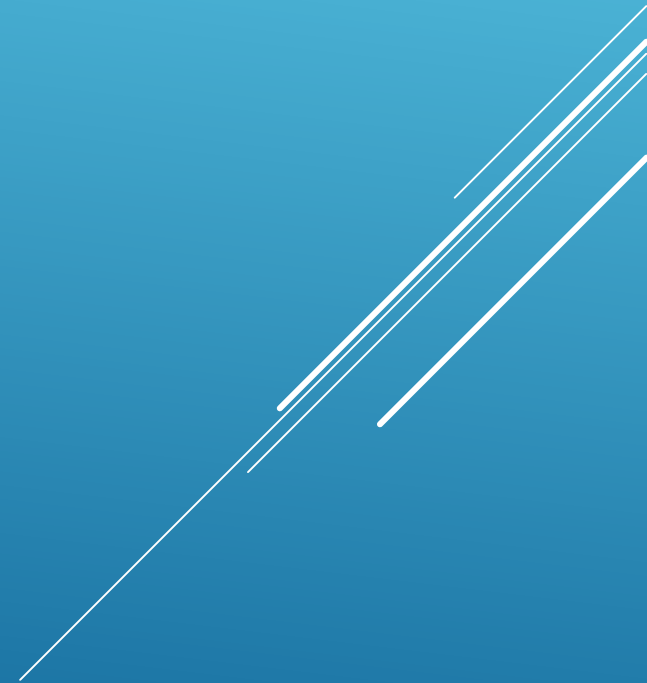# USING 13 DOCUMENTS ACCOUNT

Updating Account/Login Information

- All fields, except "Registration", may be updated to reflect your current information.
- Updating "E-Mail Address" will require you to logout of 13 Documents to update.
- Once you've completed your changes, click "Update" to apply the changes to your account.

ACCOUNT DETAILS

- Completed: Account
- Next: Closing

SECTION COMPLETE

PRESENTER REMARKS/COMMENTS

Closing Remarks from the Presenter.