



# 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



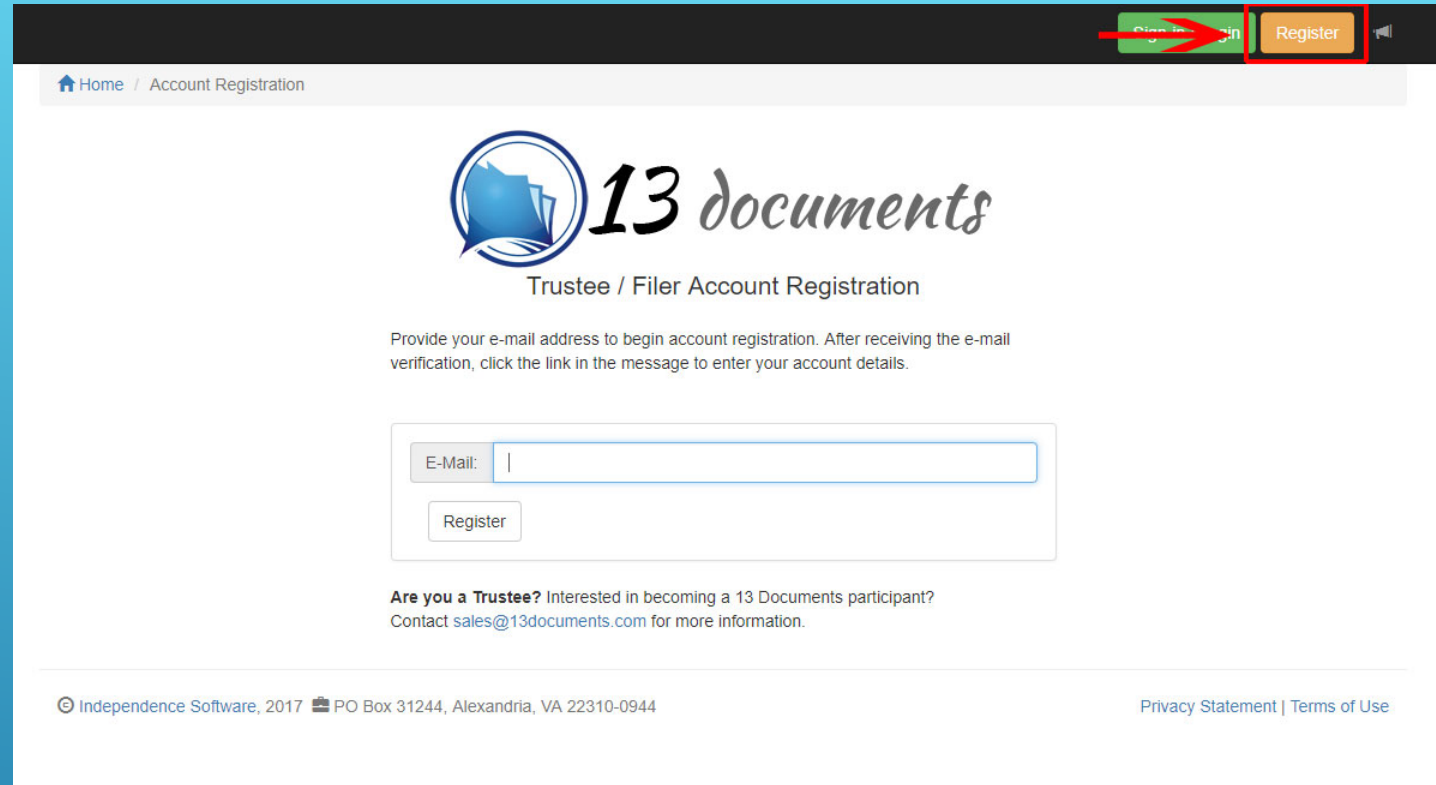
# USING 13 DOCUMENTS REGISTRATION

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.



The screenshot shows the 'Account Registration' page of the 13 Documents website. At the top right, there are two buttons: 'Sign In' (highlighted with a red arrow) and 'Register' (highlighted with a red box). The page header includes a breadcrumb trail: 'Home / Account Registration'. The main content area features the 13 Documents logo, which consists of a blue circular icon with a document and the text '13 documents' in a stylized font. Below the logo, the text 'Trustee / Filer Account Registration' is displayed. A paragraph of instructions states: 'Provide your e-mail address to begin account registration. After receiving the e-mail verification, click the link in the message to enter your account details.' Below this text is a registration form with an 'E-Mail:' label, a text input field, and a 'Register' button. At the bottom of the form area, there is a link for 'Are you a Trustee?' and contact information for sales@13documents.com. The footer contains copyright information for Independence Software, 2017, and links to the Privacy Statement and Terms of Use.

Sign In Register

Home / Account Registration

 **13 documents**

Trustee / Filer Account Registration

Provide your e-mail address to begin account registration. After receiving the e-mail verification, click the link in the message to enter your account details.

E-Mail:

Register


**Are you a Trustee?** Interested in becoming a 13 Documents participant?  
Contact [sales@13documents.com](mailto:sales@13documents.com) for more information.

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# BEGINNING REGISTRATION




[Home](#) / [Account Registration](#)



## Trustee / Filer Account Registration


Provide your e-mail address to begin account registration. After receiving the e-mail verification, click the link in the message to enter your account details.

E-Mail:



**Register**

**Are you a Trustee?** Interested in becoming a 13 Documents participant? Contact [sales@13documents.com](mailto:sales@13documents.com) for more information.

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[Privacy Statement](#) | [Terms of Use](#)

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

[Sign-in / Login](#) [Register](#)

[Home](#) / Account Registration

  
Trustee / Filer Account Registration

Provide your e-mail address to begin account registration. After receiving the e-mail verification, click the link in the message to enter your account details.

**Account already exists.** [Forgotten password?](#)

E-Mail:

 **Register**

**Are you a Trustee?** Interested in becoming a 13 Documents participant?  
Contact [sales@13documents.com](mailto:sales@13documents.com) for more information.

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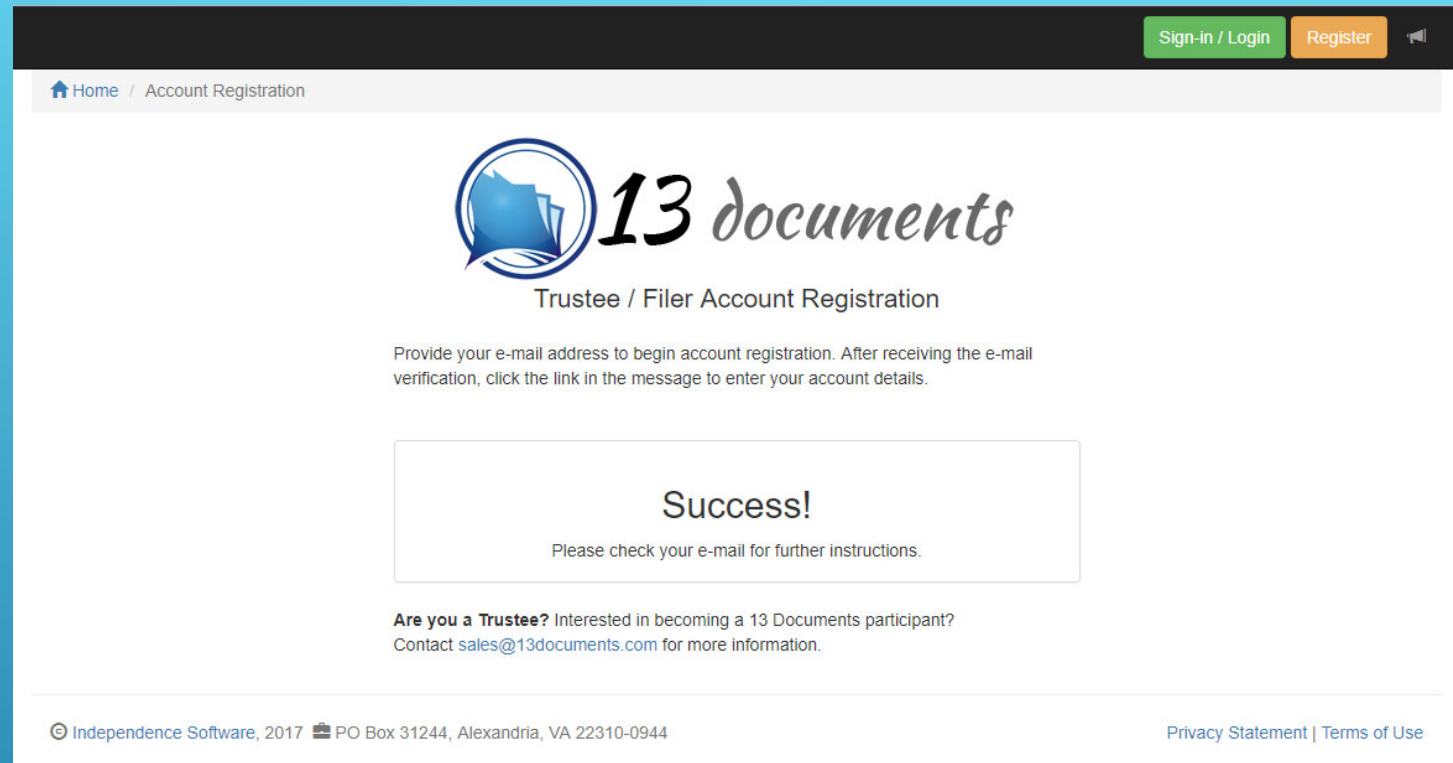
[Privacy Statement](#) | [Terms of Use](#)

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](mailto:support@13documents.com)

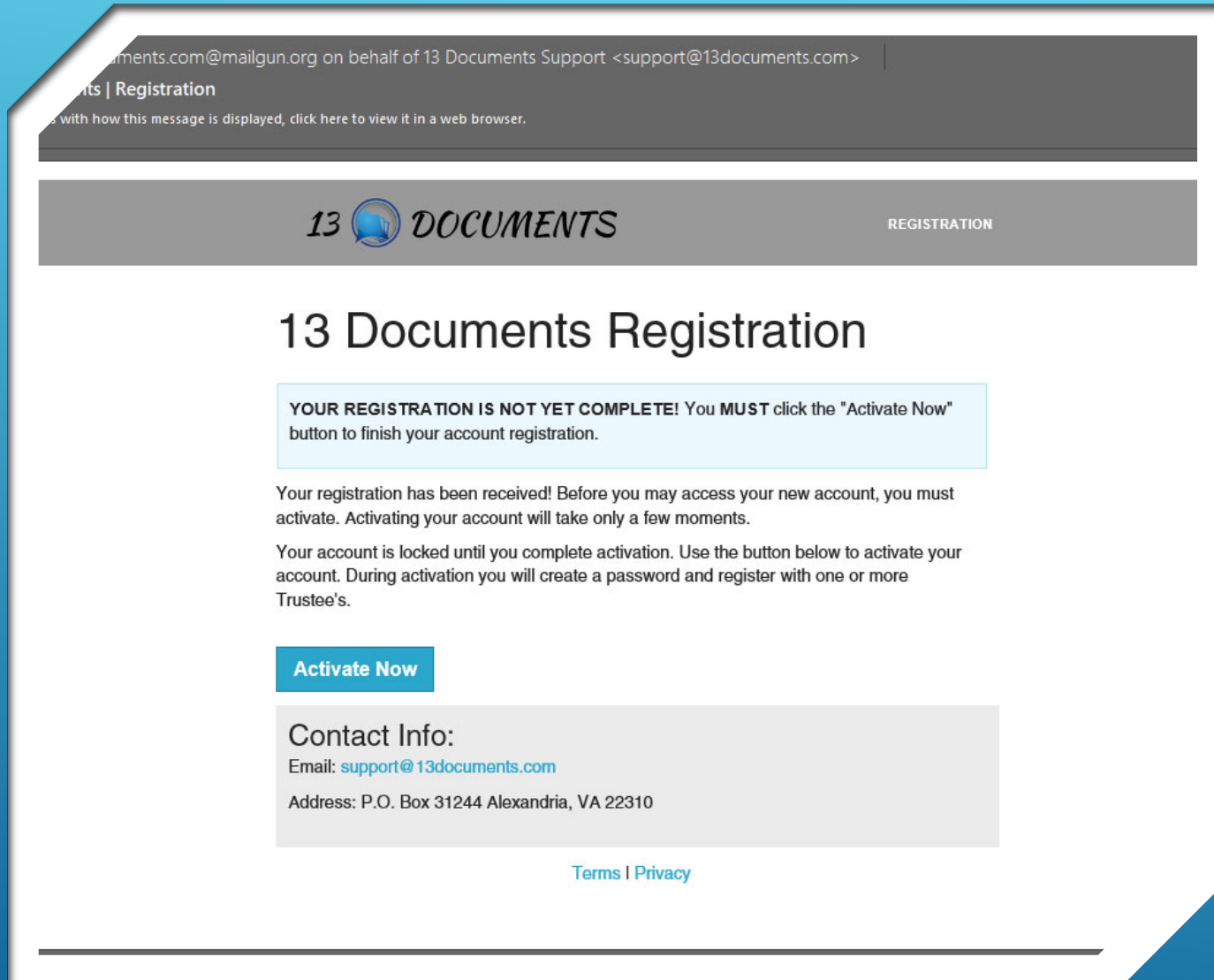
# ACCOUNT ALREADY EXISTS



*Your email address has been registered. An email will be sent with validation instructions.*


# REGISTRATION SUCCESS

# VALIDATION EMAIL EXAMPLE



Sign-in / Login Register

Home / Registration Details



Registration Details

Your registration is almost complete. Use the form below to provide your account details to complete registration.

Username:

First Name:

Last Name:

Company / Firm:

Address:

City:

State:

Zipcode:

Telephone:

Registration:

Timezone:

Passwords:

Must be at least 8 characters in length;  
Must contain at least one (1) number;  
Must contain at least one (1) Uppercase letter.

Password:

Repeat:

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- ▶ 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

Home / Registration Details

Sign-In / Login Register

**Your registration is complete!** You may choose to request access from a Trustee or proceed to the main landing page.

[Request Trustee Access \(Recommended\)](#) [Proceed to Filer Home](#)

### Registration Details

Your registration is almost complete. Use the form below to provide your account details to complete registration.

**Username:** supermatako@gmail.com

**First Name:** Justin

**Last Name:** Crone

**Company / Firm:**

**Address:** 974 Harrison Cir

**City:** Alexandria

**State:** Virginia

**Zipcode:** 22304

**Telephone:** 2676793931

**Registration:** 07/20/2018

**Timezone:** (GMT -5:00) Eastern Time

# 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





[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. Del

[Request](#)

Amrane Cohen (Santa Ana)

[Request](#)

Annette C. Crawford

[Request](#)

Melissa J. Davey

[Request](#)

Faye D. English

[Request](#)

M. Michael Fil...

[Request](#)

REQUEST UPLOAD PERMISSION  
TRUSTEE AUTHORIZATIONS

Keith Rucinski	Request
Albert Russo	Request
William K. Stephenson	Request
Mary Ida Townson	Request
Tim Truman	Request
Test Trustee	Request
Mary K. Viegelahn	Request

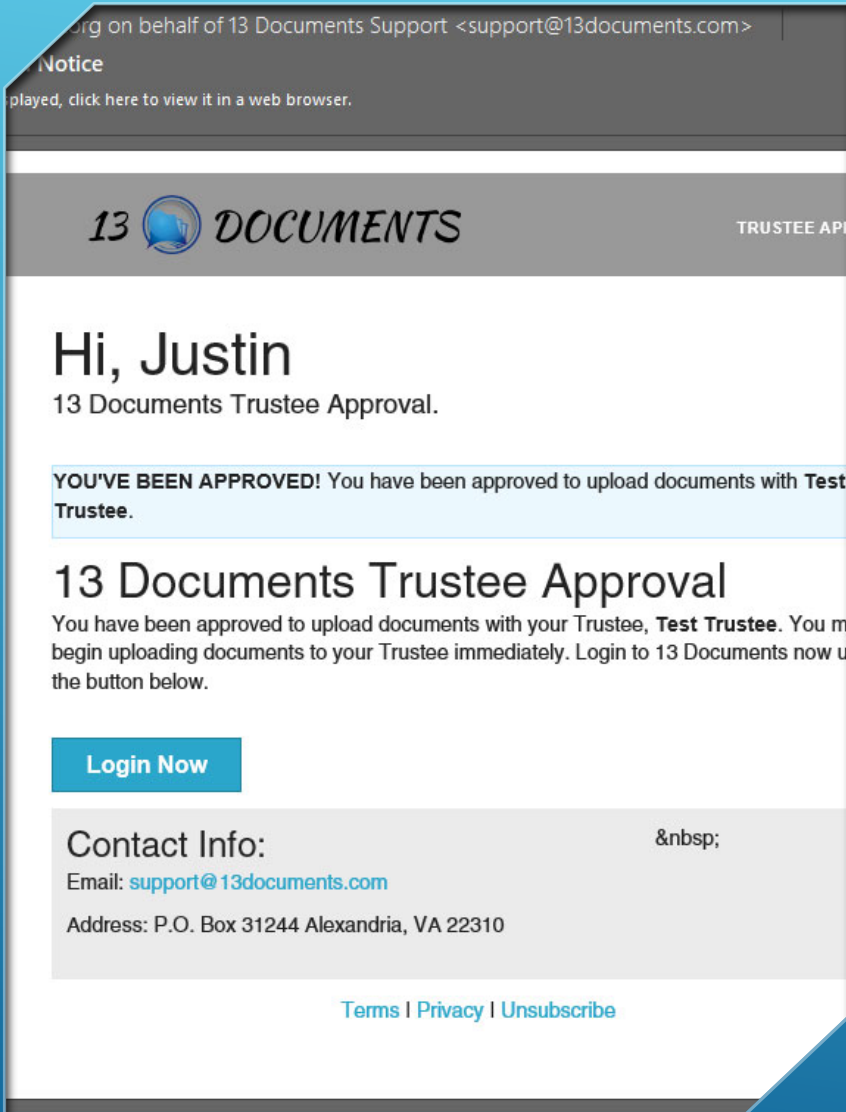
Click "Request" next to the Trustee(s) name(s) for whom you would like to upload documents.

# CHOOSE YOUR TRUSTEE(S)

Keith Rucinski	Request
Albert Russo	Request
William K. Stephenson	Request
Mary Ida Townson	Request
Tim Truman	Request
Test Trustee	Approved
Mary K. Viegelahn	Request

*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

# Document Upload

## Step 1: Choose Your Trustee

Trustee, Test   

To change Trustee click the "Remove default" button.

Trustee Message to Filer

File 2014 Tax Returns

## Step 2: Select or Drag & Drop Your File(s)

You may select or drag & drop one or as many as ten documents at one time. You may also perform multiple selections by clicking the "Browse..." button repeatedly. **However you select your file(s), you may have no more than ten files in queue at one time.**

 Browse...

Select one or more files by pressing **ctrl** or **shift** button while clicking on the file name(s).  
**Maximum file upload size 10 MB as set by Trustee.**  
Accepted document types are: Adobe Portable Document Format (PDF)

# 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



13 DOCUMENTS

You are: Home > Document Upload

Justin Crone Logout

Logged in approximately: 34 minutes ago

Home

Document Upload

YOU ARE HERE

Trustee Authorizations

Documents Report

Document Inbox

Account

HELP

### Document Upload

#### Step 1: Choose Your Trustee

Trustee, Test

Fillable Forms Available! Remove default

To change Trustee click the "Remove default" button.

Trustee Message to Filer

File 2014 Tax Returns

#### Step 2: Select or Drag & Drop Your File(s)

You may select or drag & drop one or as many as ten documents at one time. You may also perform multiple selections by clicking the "Browse..." button repeatedly. **However you select your file(s), you may have no more than ten files in queue at one time.**

Browse...

Select one or more files by pressing **ctrl** or **shift** button while clicking on the file name(s).  
**Maximum file upload size 10 MB as set by Trustee.**  
Accepted document types are: Adobe Portable Document Format (PDF)

Send File(s)... Reset

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- ▶ 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

NTS

Justin Crone Logout

Upload

Logged in approximately: 34 m

## Document Upload

Step 1: Choose Your Trustee

Trustee, Test

Fillable Forms Available!

Remove default

To change Trustee click the "Remove default" button.

Trustee Message to Filer

File 2014 Tax Returns

Step 2: Select or Drag & Drop Your File(s)

You may select or drag & drop one or as many as ten documents at one time. You may also perform multiple selections by clicking "Browse..." button repeatedly. **However you select your file(s), you may have no more than ten files in queue at one time.**

Browse...

Select one or more files by pressing **ctrl** or **shift** button while clicking on the file name(s).  
**Maximum file upload size 10 MB as set by Trustee.**  
Accepted document types are: Adobe Portable Document Format (PDF)

Send File(s)...

Reset

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## 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 are: [Home](#) > [Document Upload](#)

▶ 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.

Document Upload

YOU ARE HERE  
Trustee Authorizations

Documents Report

Document Inbox

Account

HELP

Step 1: Choose Your Trustee

Trustee

To change Trustee click the "Remove default" button.

Trustee Message to Filer

File 2014 Tax Returns

## Step 2: Select or Drag &amp; Drop Your File(s)

You may select or drag & drop one or as many as ten documents at one time. You may also perform multiple selections by clicking the "Browse..." button repeatedly. **However you select your file(s), you may have no more than ten files in queue at one time.**

Browse...

Select one or more files by pressing **ctrl** or **shift** button while clicking on the file name(s).**Maximum file upload size 10 MB as set by Trustee.**

Accepted document types are: Adobe Portable Document Format (PDF)

Send File(s)...

Reset

# ATTACHING FILES (DOCUMENTS)

## STEP 2

0\_1732305\_2290\_Other.pdf

Cases may take 3-5 business days to be sent from the Trustee.

1732302

INVALID CASE NUMBER

Select Document Type

Document type must be selected.

Document description (max. 140 characters)

You have 140 characters remaining.

Remove File

Send File(s)... Reset

- ▶ 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

0\_1732305\_2290\_Other.pdf

✓

KEVIN M ROONEY & JACQUELYN M ROONEY

Cases may take 3-5 business days to be sent from the Trustee.

1732305

Other - Miscellaneous [2290]

Document description (max. 140 characters)

You have 140 characters remaining.

Remove File

Redaction Message

It is the filer's responsibility to verify that all but the last four digits of debtor(s)'s social security numbers and the social security numbers and other personally identifiable information with regard to minor children have been permanently redacted. The attorney assumes complete responsibility for the redaction of such numbers and information on documents input into the system. The Trustee shall not be liable to anyone for the failure of the attorney to redact such numbers and information.

☐ You must agree to the stated redaction rules.

Send File(s)...

Reset



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.*

0\_1732305\_2290\_Other.pdf

**KEVIN M ROONEY & JACQUELYN M ROONEY**  
Cases may take 3-5 business days to be sent from the Trustee.  

1732305Other - Miscellaneous [2290]

Document description (max. 140 characters)  
You have 140 characters remaining.

Remove File

Redaction Message

It is the filer's responsibility to verify that all but the last four digits of debtor(s)'s social security numbers and the social security numbers and other personally identifiable information with regard to minor children have been permanently redacted. The attorney assumes complete responsibility for the redaction of such numbers and information on documents input into the system. The Trustee shall not be liable to anyone for the failure of the attorney to redact such numbers and information.

☒ You must agree to the stated redaction rules.

Send File(s)...

Reset

FINISH, SEND FILE(S)...

## Document Upload

0\_1732305\_2290\_Other.pdf



File uploaded successfully.

**THIS IS NOT A CONFIRMATION/RECEIPT OF ACCEPTANCE!**

Get an upload certification for document serial [DOC130000000001090476](#) (this link expires after 5 minutes)

Upload Additional Files

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 RECEIVED BY 13 DOCUMENT, NOT YOUR TRUSTEE.)*

# UPLOAD COMPLETED

## Certification of Document Receipt

13 DOCUMENTS HAS RECEIVED YOUR FILE

Document serial number: **DOC130000000001090476**

This is the serial number which has been assigned to your document. Use the serial number to reference this upload with the Trustee or 13 Documents staff.

Case Number: 1732305

Print

**Original Filename:** 0\_1732305\_2290\_Other.pdf  
**Received Date:** Saturday, July 21st 12:37:18 PM (local)  
**Document Type:** Other - Miscellaneous  
**Uploaded by:** Justin Crone <supermatako@gmail.com>  
**In-Transit for:** Test Trustee  
123 Trustee Dr.  
Trusteeville, AL 12345-0000  
P:

*13 Documents does not make any guarantee to the accuracy of the information provided by the filer for any purpose.*

### NOTICE

To protect personally identifiable information, this document was encrypted immediately upon receipt. The 13 Documents staff is unable to view the contents of this document. Any change requests regarding this document, the content of, or the details (i.e. document content, case number, or document type) cannot be made. You must contact the Trustee to effect changes to this document.

Close

## 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



13 DOCUMENTS

Justin CroneLogout?

You are: Home > Reports > All Documents

Logged in approximately: about an hour ago

Home

Document Upload

Trustee Authorizations

Documents Report

Document Inbox

Account

HELP

All Documents

Listing all documents uploaded by your account. This list is searchable using the search box below. The search box will search all fields for your search term. Partial matches will be made.

Download History

Print current pageColumn visibilitySearch:

Case	Received	Download	Type	Trustee	Serial Number	Size
1732305	2018-07-21 12:37:18	0000-00-00 00:00:00	Other - Miscellaneous	Test Trustee	DOC130000000001090476	12421K

Showing 1 to 1 of 1 entriesPreviousNext

Your upload history contains a list of documents uploaded.

VIEWING YOUR UPLOAD HISTORY

# DOCUMENT HISTORY EXPLAINED

- ▶ 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.

## 13 Documents | Filer Account

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

# DOCUMENT HISTORY EXPLAINED (CONT.)

- ▶ **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.

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”?



13 DOCUMENTS

Justin Crone Logout ?

You are: Home /

Logged in approximately: less than a minute ago

Home

Document Upload

Trustee Authorizations

Documents Report

Document Inbox 1

Account

HELP

## Home

Welcome, Justin Crone to 13 Documents.

Our new site provides an easy to navigate and modern design to our software.

Using the controls to the left, you may:

- Document Upload
- Trustee Authorizations
- Documents Report
- and Update your Account Information

New features are being added all the time check your Inbox regularly for notices from 13 Documents about upcoming features. Be sure to whitelist our email, [support@13documents.com](mailto:support@13documents.com), in your SPAM filtering software so you don't miss important notices.

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  entries

Search:

Case	Received	Trustee	
1732305	07/21/2018 1:09 PM	Test Trustee	<a href="#">View</a>

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



## Account Details

Our account contact data. This information is used by the Trustee to verify your relation to cases administered by the Trust. Please ensure this information is up-to-date.

<b>E-Mail Address:</b>	<input type="text" value="test@email.com"/>		
	<a href="#">Change Password</a> ⓘ	Last changed: 2018-07-20	
<b>Name:</b>	<input type="text" value="Test"/>	<input type="text" value="Middle"/>	<input type="text" value="User"/>
<b>Entity Name:</b>	<input type="text"/>		
<b>Address 1:</b>	<input type="text" value="P.O. Box 31244"/>		
<b>Address 2:</b>	<input type="text"/>		
<b>Address 3:</b>	<input type="text"/>		
<b>City:</b>	<input type="text" value="Alexandria"/>		
<b>State:</b>	<input type="text" value="Virginia"/>		
<b>Zipcode:</b>	<input type="text" value="22310-0944"/>		
<b>Telephone:</b>	<input type="text" value="8005555555"/>		
<b>Registration:</b>	<input type="text" value="07/20/2018"/>		
<b>Timezone:</b>	<input type="text" value="(GMT -5:00) Eastern Time"/>		
<input type="button" value="Update"/>			

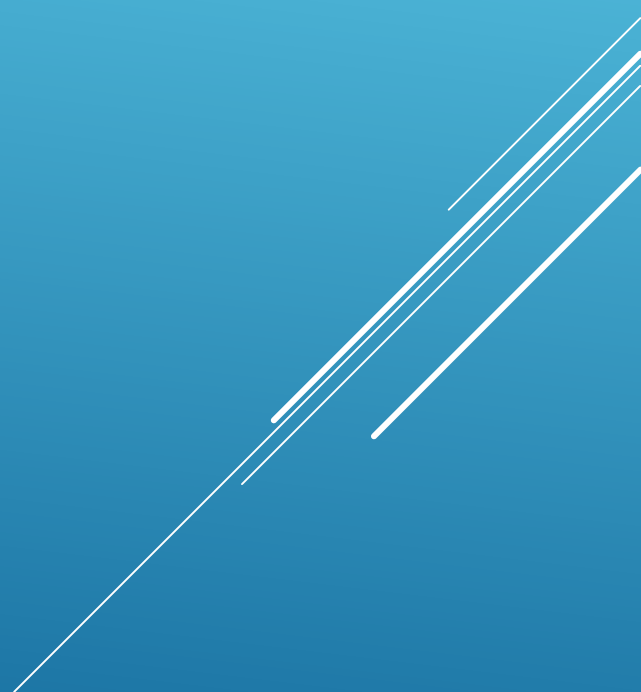
- ▶ All fields, except “Registration”, may be updated to reflect your current information.
- ▶ Updating “E-Mail Address” will require you to logout of 13 Documents to update.
- ▶ Once you’ve completed your changes, click “Update” to apply the changes to your account.

# ACCOUNT DETAILS



- ▶ Completed: Account
- ▶ Next: Closing

SECTION COMPLETE



# PRESENTER REMARKS/COMMENTS

Closing Remarks from the Presenter.

