CINcompass® CONNECTION

News, Updates, & Useful Tips for CINcompass Users

January 2014

Discover how to quickly access, edit and add custom/local forms, automate client notifications and more. This issue is packed with time-saving features that only CINcompass can provide. We hope you enjoy this issue and as always we look forward to your suggestions and insights. Happy New Year!

In This Issue

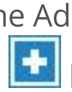
Feature Spotlight:
Create, Edit and Add Custom/Local Forms

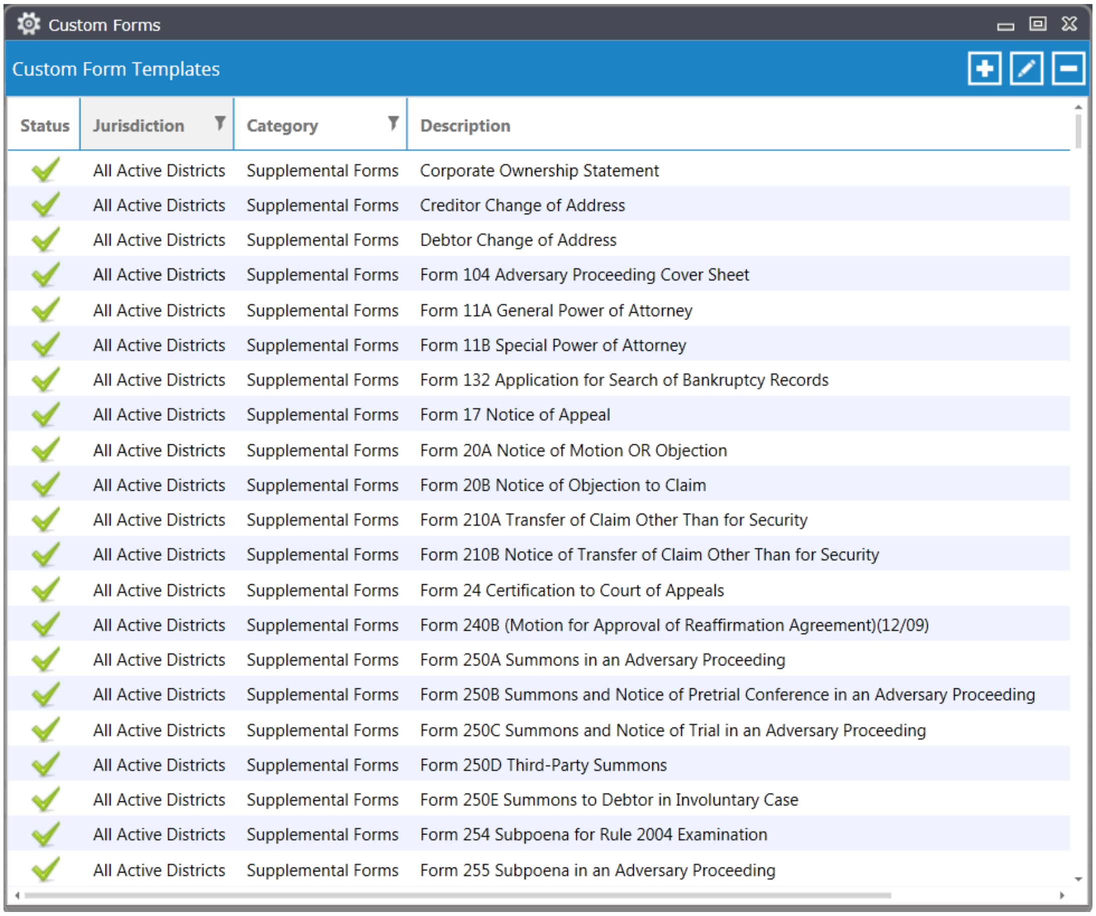
Next time you prepare a petition, make sure you access the 900+ Custom/Local forms to help ensure compliance to your jurisdiction's form requirements. However, if you have more specific needs, it is easy to create a new document, upload your own or edit existing forms. Plus you can add custom fields with more than 100 tokens that auto-populates bankruptcy data into the forms.

In this section you will learn how to:

- Create a brand new form
- Edit an existing form
- Upload your own forms

To create a new form:

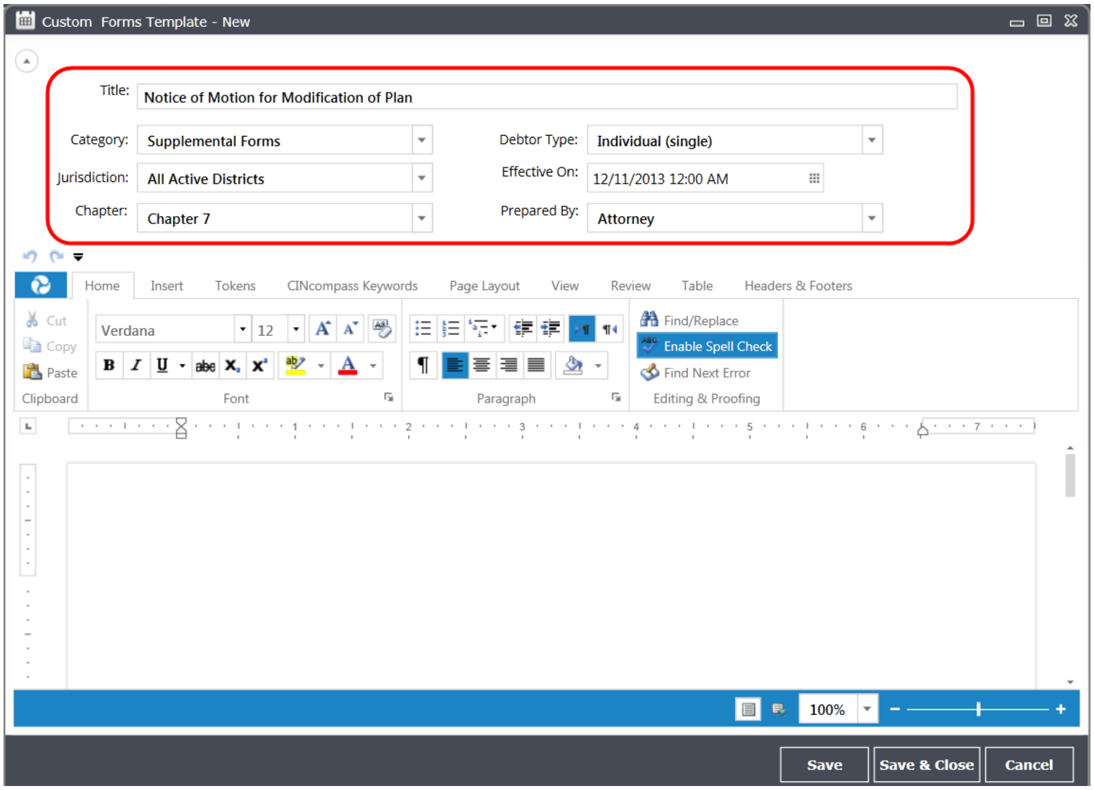
1. Under the Admin Tool  select **Custom Forms**
2. Click the  button to create a new form



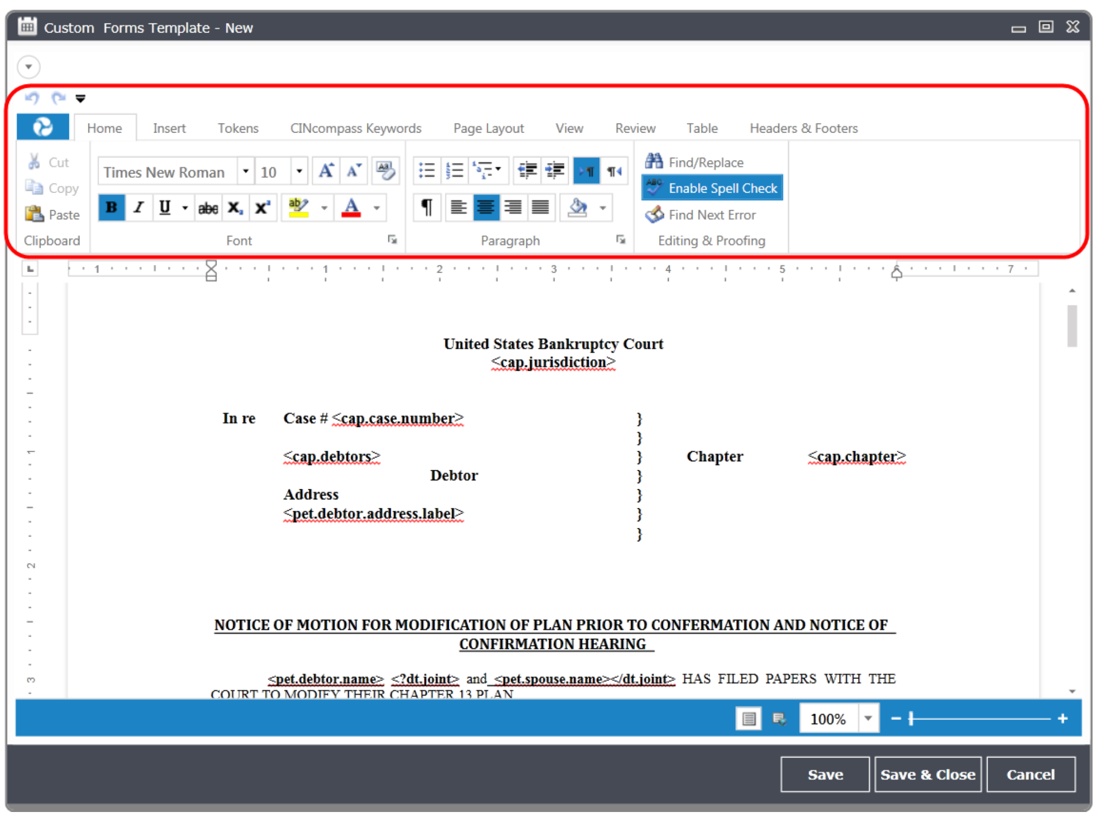
Status	Jurisdiction	Category	Description
✓	All Active Districts	Supplemental Forms	Corporate Ownership Statement
✓	All Active Districts	Supplemental Forms	Creditor Change of Address
✓	All Active Districts	Supplemental Forms	Debtor Change of Address
✓	All Active Districts	Supplemental Forms	Form 104 Adversary Proceeding Cover Sheet
✓	All Active Districts	Supplemental Forms	Form 11A General Power of Attorney
✓	All Active Districts	Supplemental Forms	Form 11B Special Power of Attorney
✓	All Active Districts	Supplemental Forms	Form 132 Application for Search of Bankruptcy Records
✓	All Active Districts	Supplemental Forms	Form 17 Notice of Appeal
✓	All Active Districts	Supplemental Forms	Form 20A Notice of Motion OR Objection
✓	All Active Districts	Supplemental Forms	Form 20B Notice of Objection to Claim
✓	All Active Districts	Supplemental Forms	Form 210A Transfer of Claim Other Than for Security
✓	All Active Districts	Supplemental Forms	Form 210B Notice of Transfer of Claim Other Than for Security
✓	All Active Districts	Supplemental Forms	Form 24 Certification to Court of Appeals
✓	All Active Districts	Supplemental Forms	Form 240B (Motion for Approval of Reaffirmation Agreement)(12/09)
✓	All Active Districts	Supplemental Forms	Form 250A Summons in an Adversary Proceeding
✓	All Active Districts	Supplemental Forms	Form 250B Summons and Notice of Pretrial Conference in an Adversary Proceeding
✓	All Active Districts	Supplemental Forms	Form 250C Summons and Notice of Trial in an Adversary Proceeding
✓	All Active Districts	Supplemental Forms	Form 250D Third-Party Summons
✓	All Active Districts	Supplemental Forms	Form 250E Summons to Debtor in Involuntary Case
✓	All Active Districts	Supplemental Forms	Form 254 Subpoena for Rule 2004 Examination
✓	All Active Districts	Supplemental Forms	Form 255 Subpoena in an Adversary Proceeding

3. The Forms Template opens, enter the title of your form

4. Edit any of the default information if necessary



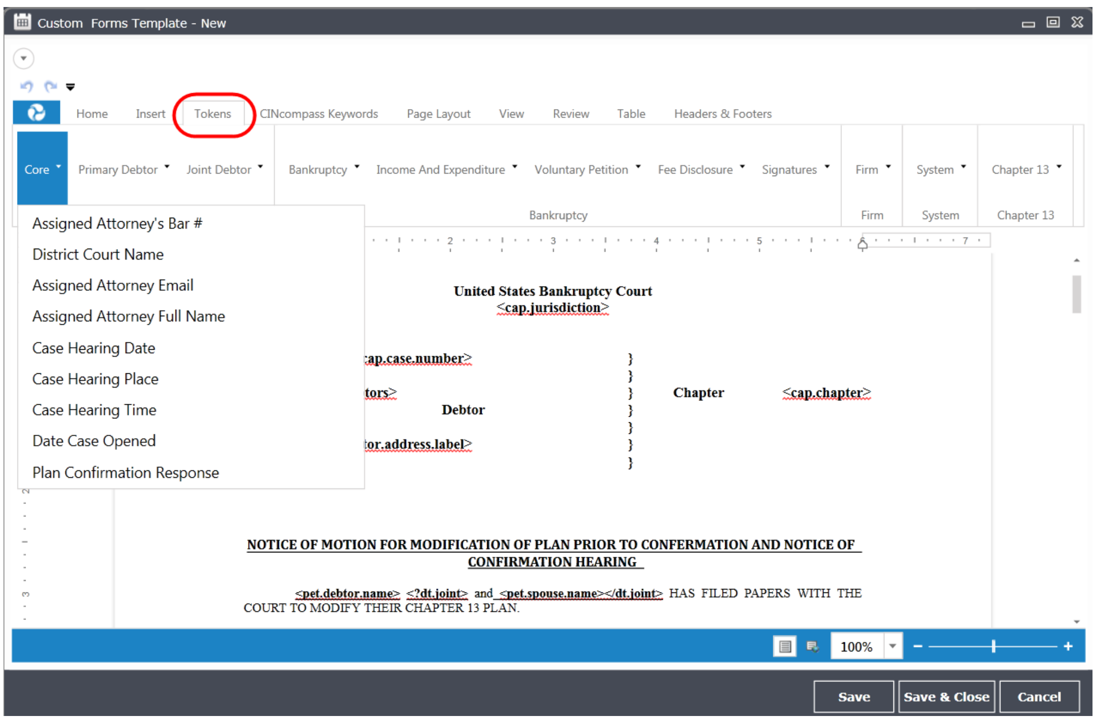
5. Use the Word editing tools to draft the form



TOKENS: Use tokens to auto-populate your forms with data entered into CINcompass. Select from:

- Case Information
- Primary and Joint Debtor data
- Bankruptcy Specific Criteria
- Income and Expenditures
- Voluntary Petition data

[See a complete list of 100+ tokens »]



6. Click **Save** when complete

The next time you prepare a bankruptcy case and you wish to include the form follow these steps

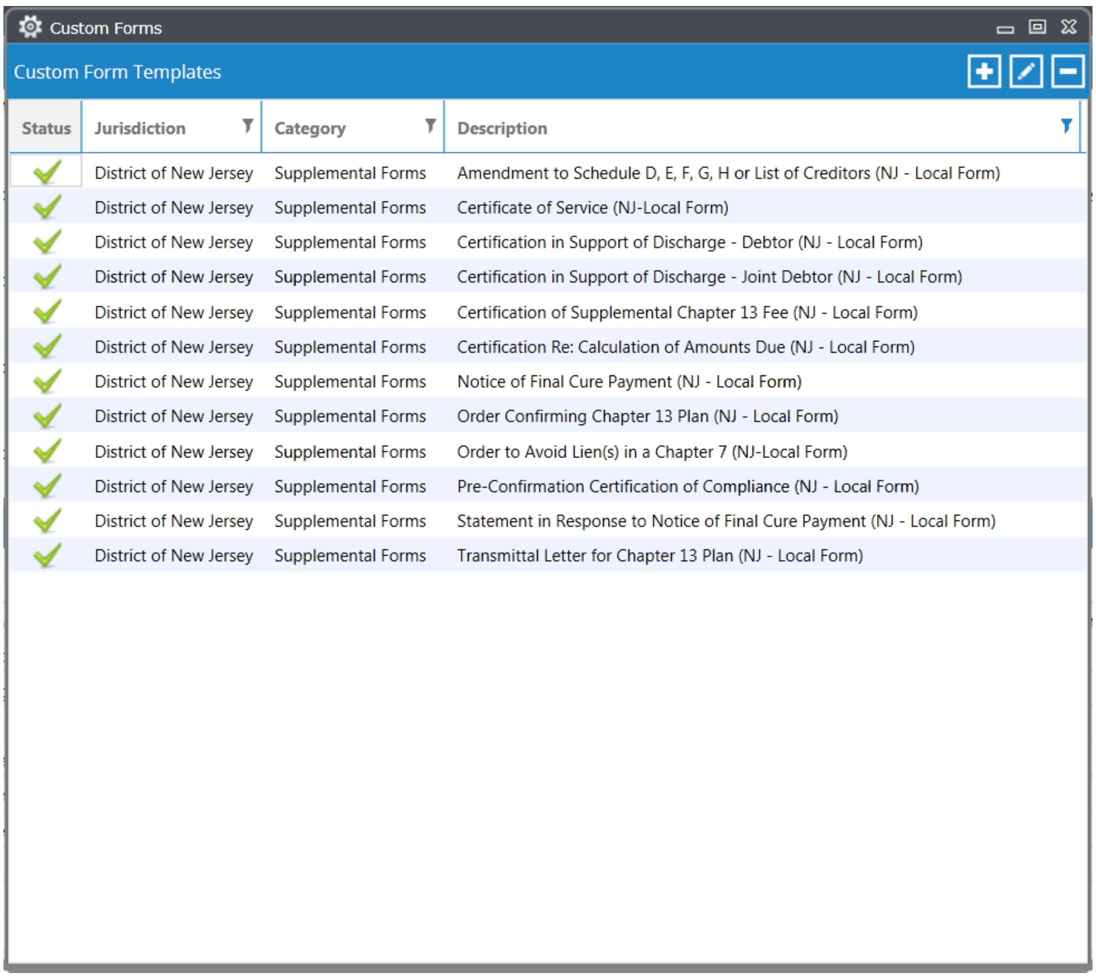
1. Go to Manage Forms
2. Select Forms from the left column
3. Click on the Custom tab
4. Click the  button to select a custom/local form

5. The Custom Form window opens with a list of forms

6. Click Add to select a form

To edit an existing custom form:

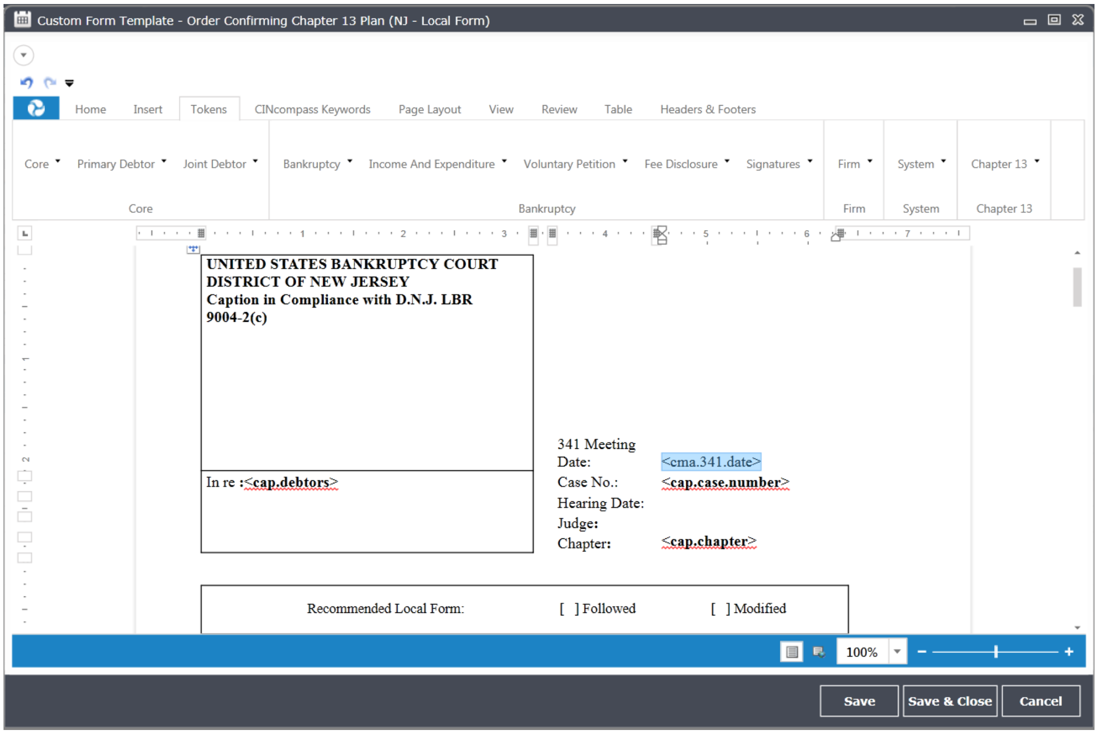
1. Under the Admin Tool select **Custom Forms**
2. The Custom Form window opens displaying a list of form templates
3. To edit an existing form, highlight it and click edit



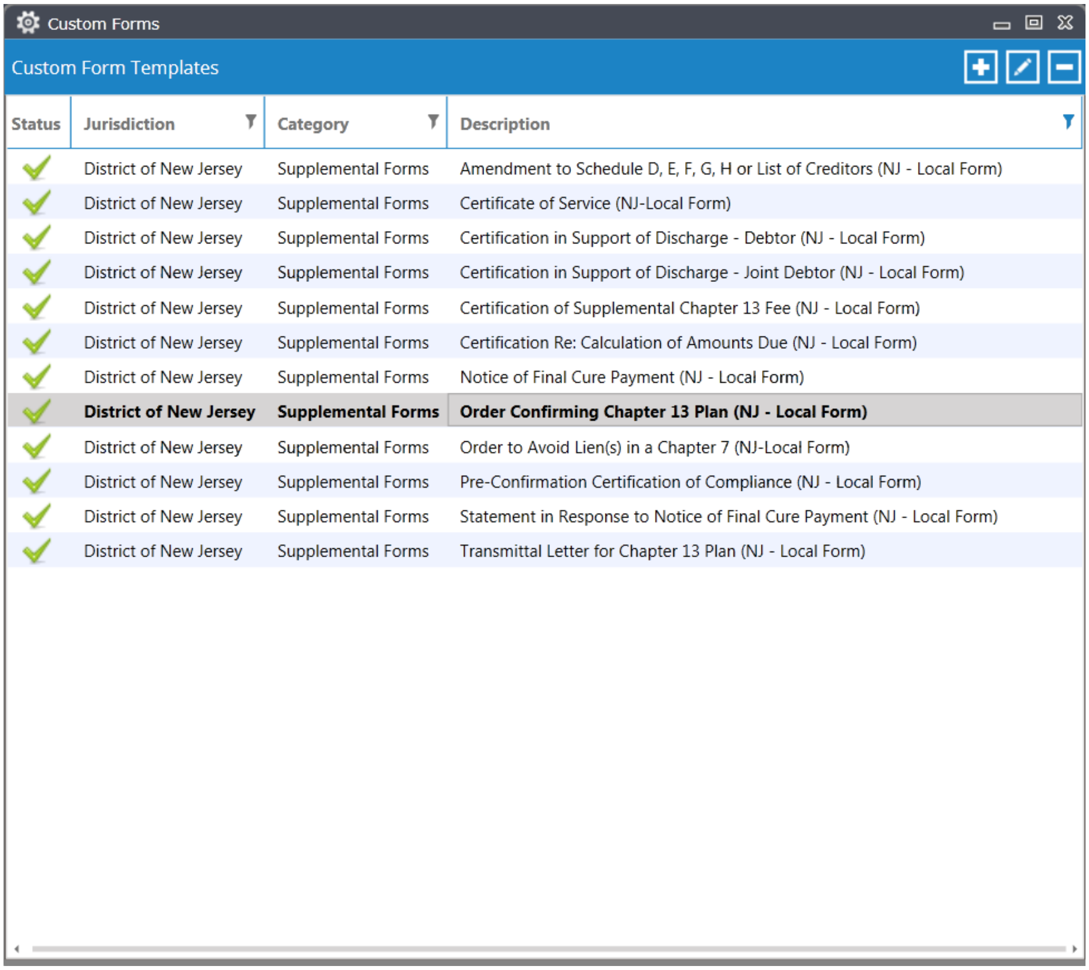
Status	Jurisdiction	Category	Description
✓	District of New Jersey	Supplemental Forms	Amendment to Schedule D, E, F, G, H or List of Creditors (NJ - Local Form)
✓	District of New Jersey	Supplemental Forms	Certificate of Service (NJ-Local Form)
✓	District of New Jersey	Supplemental Forms	Certification in Support of Discharge - Debtor (NJ - Local Form)
✓	District of New Jersey	Supplemental Forms	Certification in Support of Discharge - Joint Debtor (NJ - Local Form)
✓	District of New Jersey	Supplemental Forms	Certification of Supplemental Chapter 13 Fee (NJ - Local Form)
✓	District of New Jersey	Supplemental Forms	Certification Re: Calculation of Amounts Due (NJ - Local Form)
✓	District of New Jersey	Supplemental Forms	Notice of Final Cure Payment (NJ - Local Form)
✓	District of New Jersey	Supplemental Forms	Order Confirming Chapter 13 Plan (NJ - Local Form)
✓	District of New Jersey	Supplemental Forms	Order to Avoid Lien(s) in a Chapter 7 (NJ-Local Form)
✓	District of New Jersey	Supplemental Forms	Pre-Confirmation Certification of Compliance (NJ - Local Form)
✓	District of New Jersey	Supplemental Forms	Statement in Response to Notice of Final Cure Payment (NJ - Local Form)
✓	District of New Jersey	Supplemental Forms	Transmittal Letter for Chapter 13 Plan (NJ - Local Form)

4. The form opens allowing you to make your changes

NOTE: Use tokens to auto-populate bankruptcy forms data in the template.



5. When you are finished making your changes, click **Save**
6. Any templates with revisions will be shown in **bold** indicating the changes were made

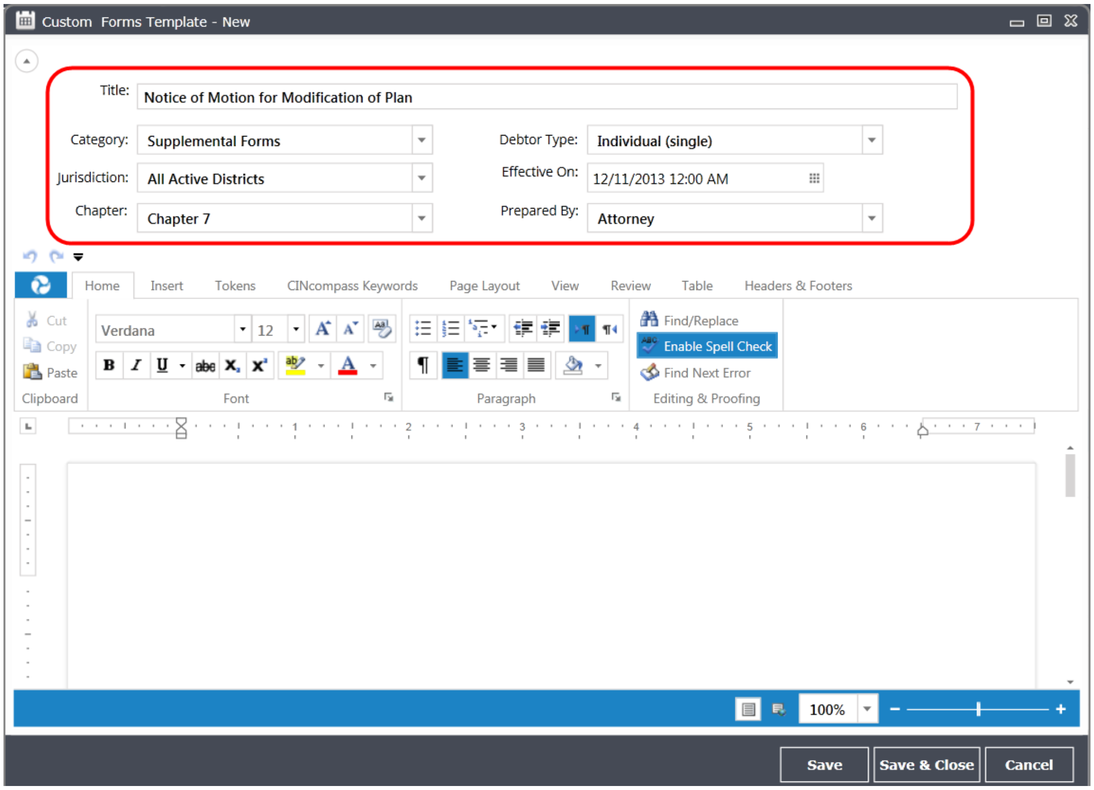


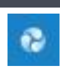
Important Tip:

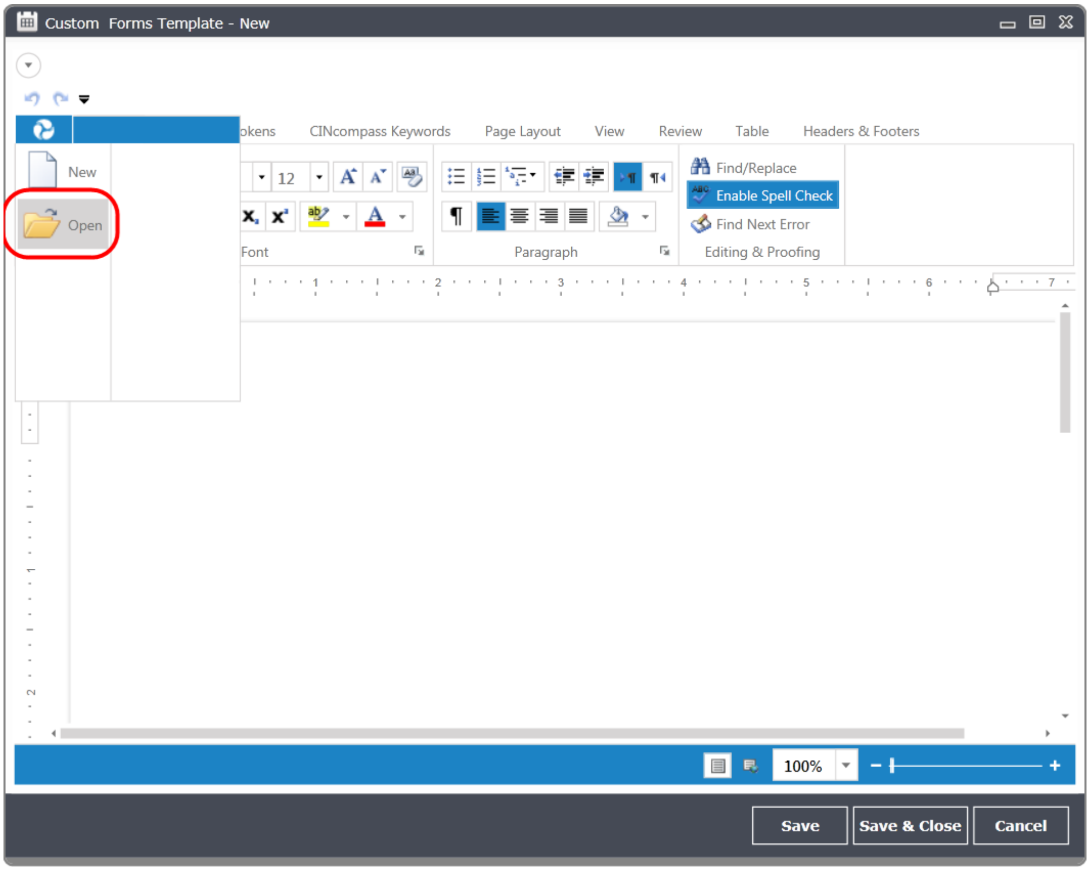
Any custom changes you may have made to your Custom/Local Template will be lost when the updated system version is obtained. Please manually re-enter any custom changes you require to the updated version before Saving the Custom/Local Template.
[How to obtain the updated system version of the Custom Form »]

To upload a form:

1. Under the Admin Tool select **Custom Forms**
2. The Custom Form window opens
3. Click the button
4. The Forms Template opens, enter the title of the form you are uploading
5. Edit any of the default information if necessary



6. Click  to open an existing document from your computer



7. Browse to the desired location and document and click **Open**
8. Click **Save** when complete

Due Diligence Showcase: Post-Discharge Credit Report

Ensure your Chapter 7 clients emerge from bankruptcy with a clear credit report.

Unfortunately for some debtors, creditors can occasionally miss notifying the national credit bureaus of a bankruptcy discharge or a judgment can be reported incorrectly. These issues can be detrimental to your client. Don't let them rely on a free credit report service or a single bureau report to verify their credit is clean because these services don't deliver a complete view or provide services to assist in resolving any issues. Provide the full support your clients need even after the bankruptcy has been discharged with a Post-Discharge Credit Report from CIN Legal Data Services.

This service automatically delivers:

- The same type of credit report ordered for their case delivered 60 days post-bankruptcy
- Free access to the services of a credit advocate to dispute issues with the credit bureaus on their behalf
- The results from the credit bureau's investigation plus a corrected report for their records

Step-by-Step Guide

How-To: Automate client reminders

Communication is essential to generating new business, keeping clients informed, and maintaining staff correspondence. Unfortunately you can spend more effort than you would like on making calls and sending emails. Save time and streamline the process by scheduling emails, sms and auto calls.

By scheduling client notifications you can:

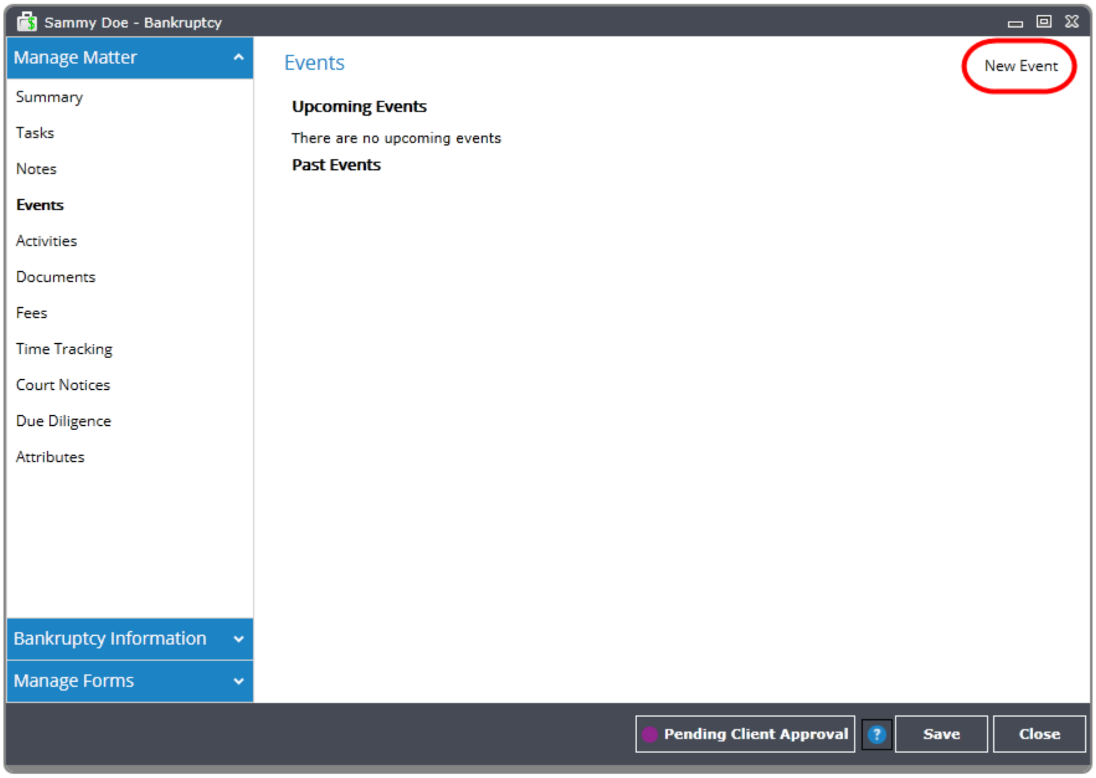
- Improve show rates for important court dates or for consultation meetings
- Ensure required documents are brought to these events
- Deliver special instructions to your client

"I love the SMS feature, it only took me two minutes to set up. The auto-call feature is great—now I don't have to remember to make reminder calls—I just set up the auto call when I set up an appointment and our clients are reminded automatically."

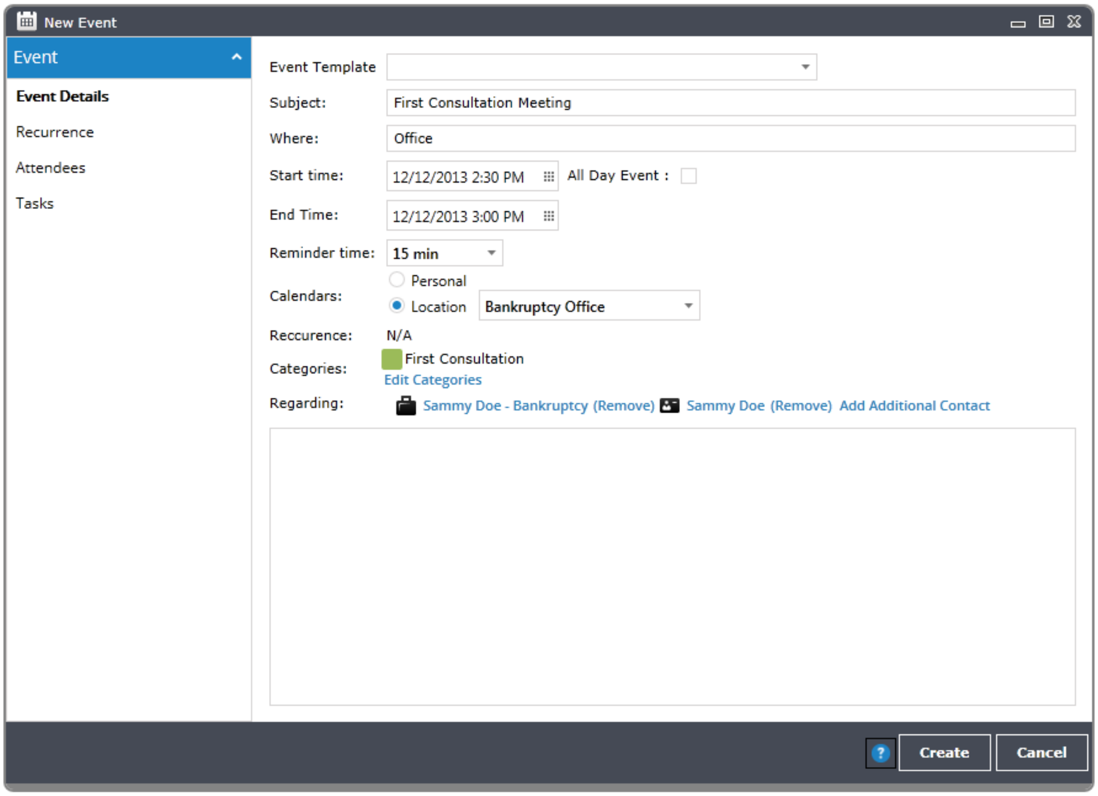
Jane Stobbs - Denver, CO

To automate client reminders you must schedule an event with a related task:

1. Open the desired matter
2. Under **Manage Matter**, select **Events**
3. Click **New Event**



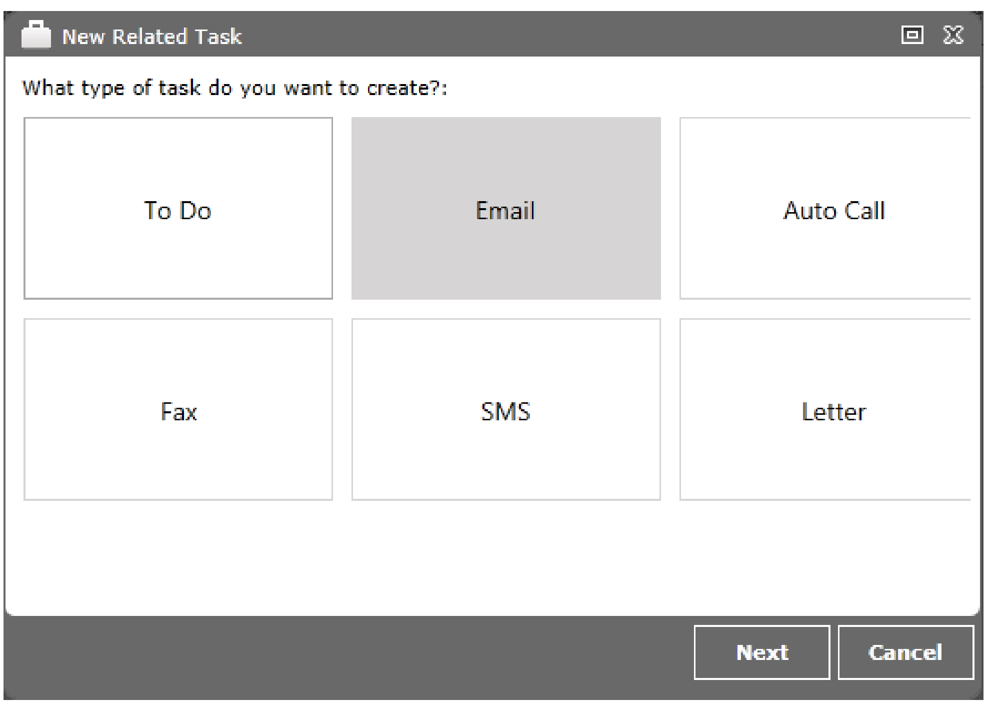
4. Enter the Event Details



5. Go to the **Tasks** tab

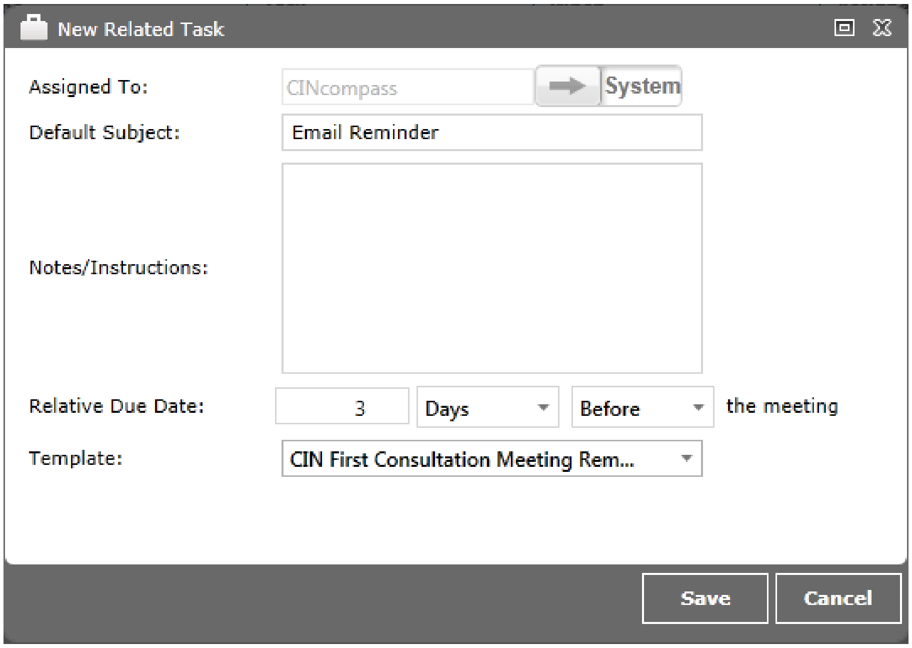
6. Use the  button to add a new **Related Task**

7. Select the type of task you would like to send as a reminder for the event

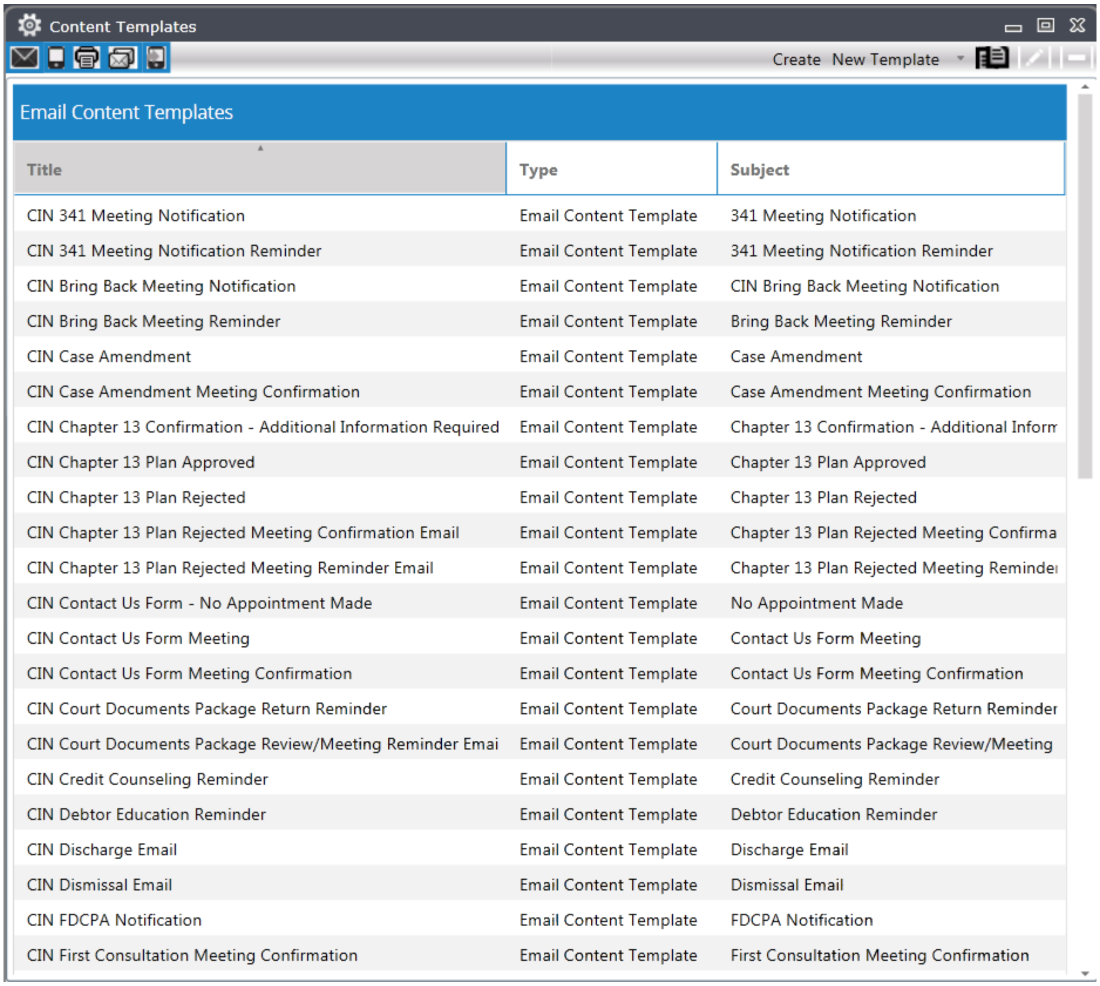


8. Click **Next**
9. Enter the details for the Related Task

NOTE: You must assign the related task to the CINcompass System for the communication to be automated.



10. Utilize the Template drop-down to choose from over 50 different communication templates!



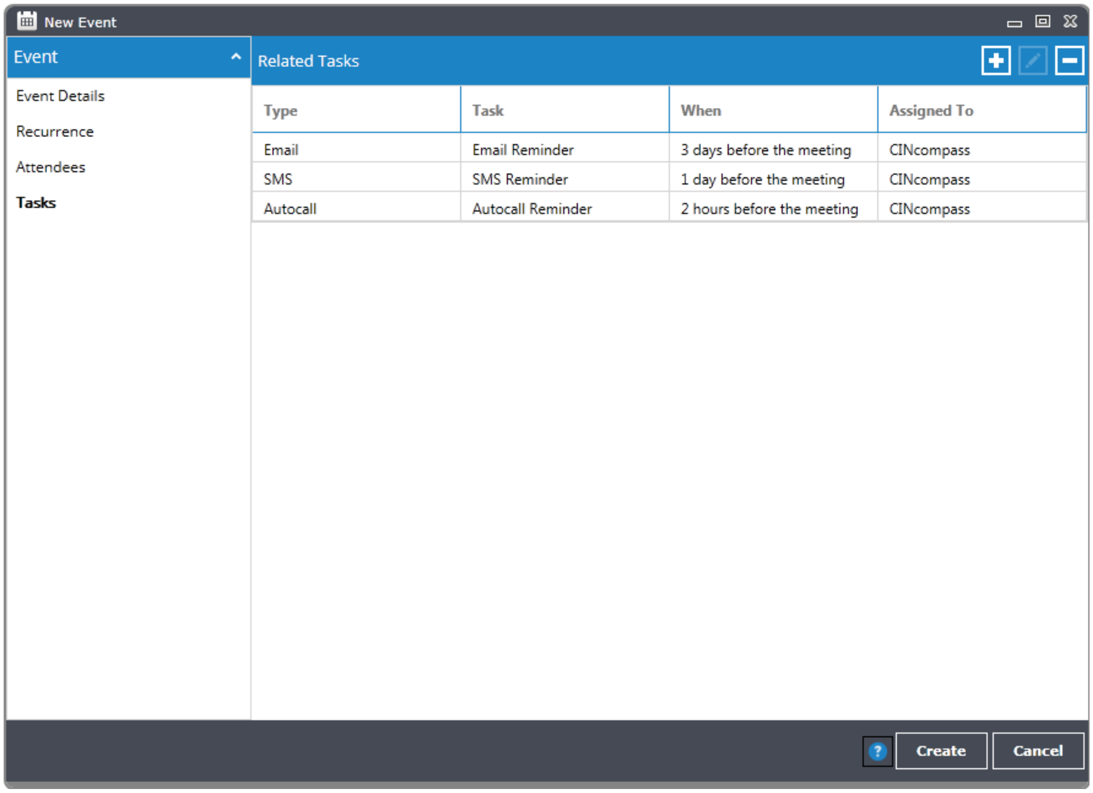
Email Content Templates

Title	Type	Subject
CIN 341 Meeting Notification	Email Content Template	341 Meeting Notification
CIN 341 Meeting Notification Reminder	Email Content Template	341 Meeting Notification Reminder
CIN Bring Back Meeting Notification	Email Content Template	CIN Bring Back Meeting Notification
CIN Bring Back Meeting Reminder	Email Content Template	Bring Back Meeting Reminder
CIN Case Amendment	Email Content Template	Case Amendment
CIN Case Amendment Meeting Confirmation	Email Content Template	Case Amendment Meeting Confirmation
CIN Chapter 13 Confirmation - Additional Information Required	Email Content Template	Chapter 13 Confirmation - Additional Inform
CIN Chapter 13 Plan Approved	Email Content Template	Chapter 13 Plan Approved
CIN Chapter 13 Plan Rejected	Email Content Template	Chapter 13 Plan Rejected
CIN Chapter 13 Plan Rejected Meeting Confirmation Email	Email Content Template	Chapter 13 Plan Rejected Meeting Confirma
CIN Chapter 13 Plan Rejected Meeting Reminder Email	Email Content Template	Chapter 13 Plan Rejected Meeting Reminde
CIN Contact Us Form - No Appointment Made	Email Content Template	No Appointment Made
CIN Contact Us Form Meeting	Email Content Template	Contact Us Form Meeting
CIN Contact Us Form Meeting Confirmation	Email Content Template	Contact Us Form Meeting Confirmation
CIN Court Documents Package Return Reminder	Email Content Template	Court Documents Package Return Reminder
CIN Court Documents Package Review/Meeting Reminder Emai	Email Content Template	Court Documents Package Review/Meeting
CIN Credit Counseling Reminder	Email Content Template	Credit Counseling Reminder
CIN Debtor Education Reminder	Email Content Template	Debtor Education Reminder
CIN Discharge Email	Email Content Template	Discharge Email
CIN Dismissal Email	Email Content Template	Dismissal Email
CIN FDCPA Notification	Email Content Template	FDCPA Notification
CIN First Consultation Meeting Confirmation	Email Content Template	First Consultation Meeting Confirmation

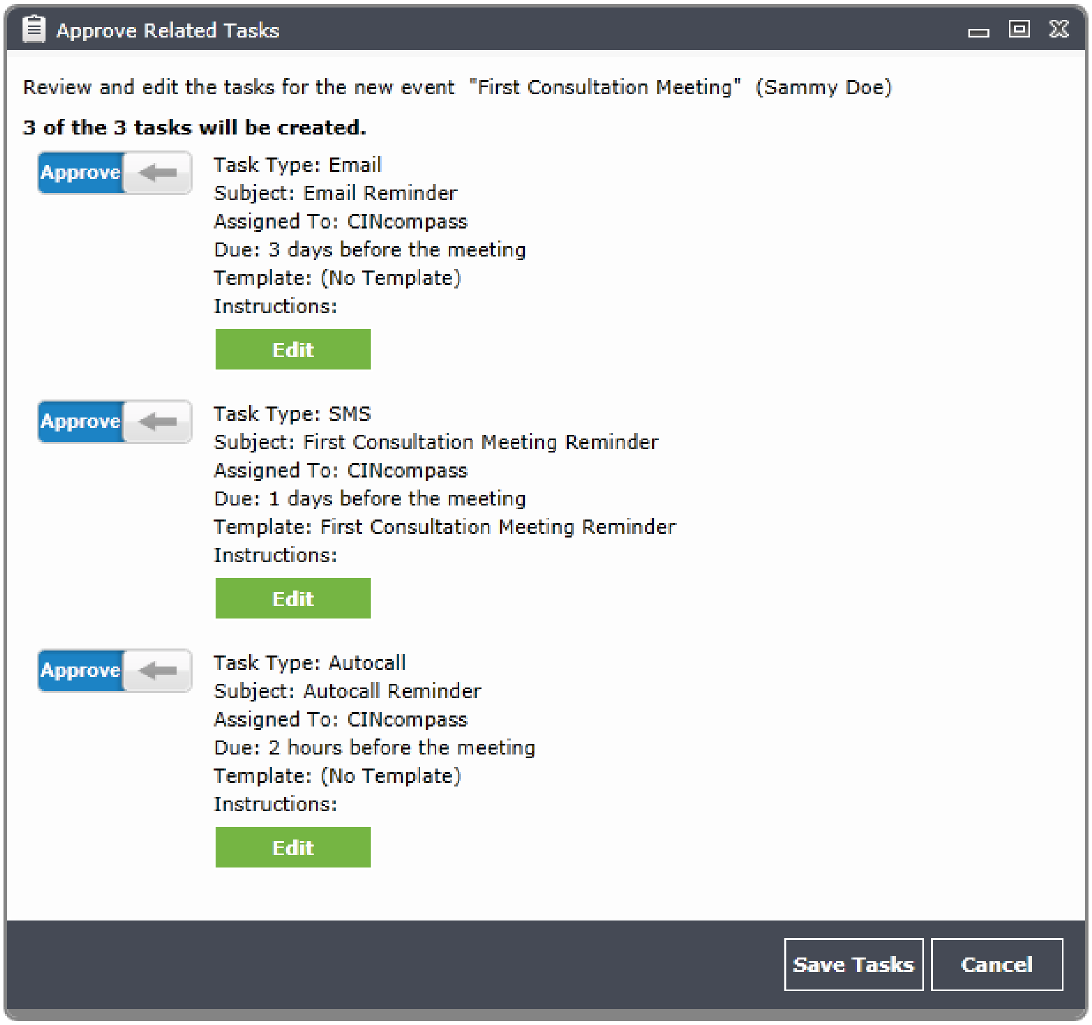
Important Tip:

You may also edit the existing Templates or add your own under **Content Templates**. Simply click the Admin Tool and select Content Templates to access the full list of Communication Templates.

11. Click **Save**
12. Repeat added Tasks as necessary



13. Click **Create** to create the Event
14. Click **Save** to save all Tasks
15. Click **Save & Close** to save the Event



NOTE: Use the **Approve** and **Discard** arrow if you wish to discard a specific Related Task.

Download the Communications Quick Start Guide for more information »

Did You Know?

Buttons have been strategically placed throughout CINcompass so you may order the due diligence information you need while preparing a petition. In addition, you can easily monitor the status of any order through CINcompass during this process.

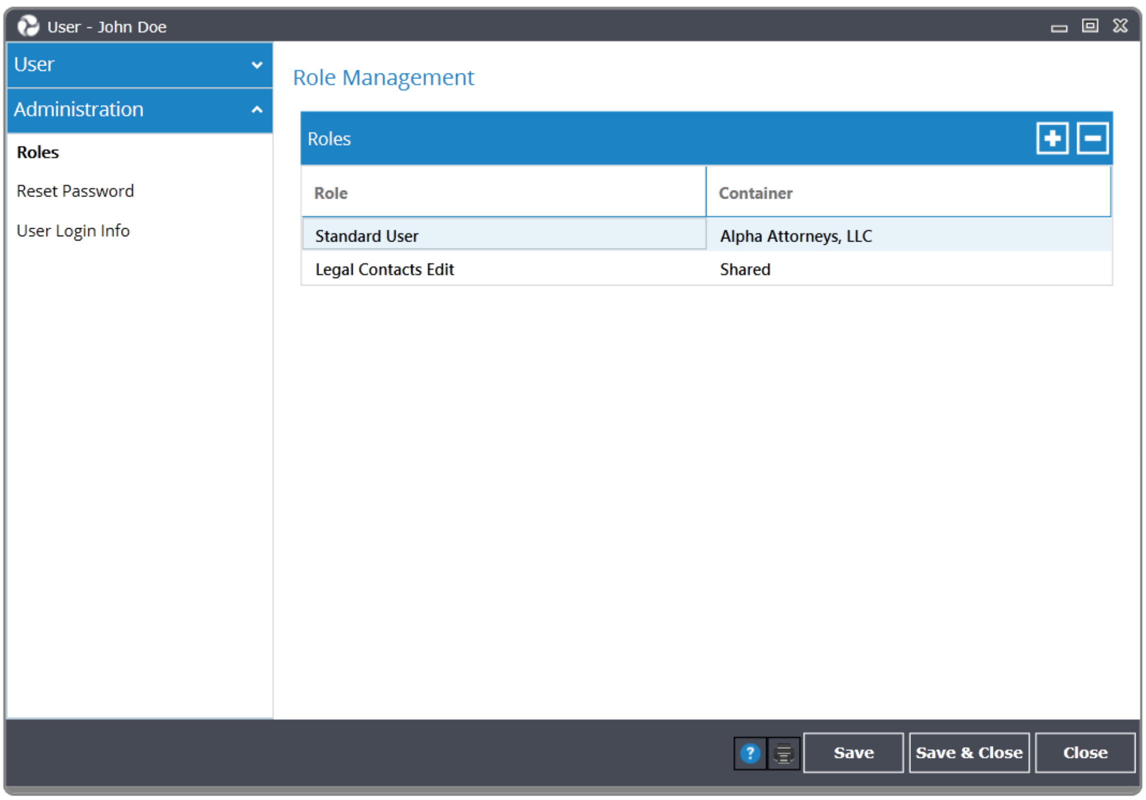
View Due Diligence product and pricing information »

Quick Tip: CINcompass & Roles

Unlimited users, ultimate control

Easily add and manage all Attorney and User accounts within CINcompass. You have control of the Roles and associated Permissions granted to each user at any time.

For step-by-step instructions, reference the Help Document or visit the Online Help within CINcompass.



We love & appreciate feedback. Email us at support@cincompass.com to provide us with your comments, topic suggestions, and any other pointers to help make this e-newsletter even better. Please add support@cincompass.com to your safe sender list or address book.
The CINgroup provides innovative due diligence and workflow products for attorneys practicing bankruptcy. Serving customers nationwide, our software products include Best Case® Bankruptcy, CINcompass® and EZ-Filing® along with due diligence services under CIN Legal Data Services®, Suite Solutions™ and Quadrant Legal Solutions™ names.

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