

## Procedures for Continued Telephonic §341 Meetings: Debtor Attorneys/Pro Se

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**Purpose** Given recent health concerns, the Office of the Chapter 13 Trustee, Marilyn O. Marshall, will be conducting continued §341 Meetings of Creditors via telephone until further notice. The audio of the meetings will be recorded. A Zoom videoconference will be conducted at least two-three days prior to the continued §341 meeting for the purpose of verifying the debtor's identity. If the identity was verified previously, there is no need to conduct a second Zoom Videoconference.

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**Effective Date** This policy is effective Monday, April 13, 2020 and is subject to change.

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**Last Updated** This policy was last updated Monday, June 15, 2020 and is subject to change.

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**www.chi13.com** Refer to the Trustee's website at [www.chi13.com](http://www.chi13.com) for updated information. Specifically, "Information of Interest to Debtor Attorneys" which can be accessed from the home page.

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## Procedures for Continued Telephonic §341 Meetings: Debtor Attorneys/Pro Se, Continued

**Determine your continued meeting date** Use this table to determine when your meeting will be conducted.

IF your meeting was continued ...	THEN your meeting will be conducted on...
	<p>The date and time listed on the Notice of Electronic Filing from the bankruptcy court.</p> <p><i>Note:</i> Only original meetings should use the format outline for Original Meetings. There is no need to send in a second request because meeting will be automatically continued if “not held” on the original date or the continued date.</p> <p>Continued meeting will be set when a date and time is available. (Please <b>Do not email client services for a continued §341 Meeting date or to continue a Zoom Video Conference if you missed the ID and SS# Meeting date.</b>) The Client Services phone line will be inoperable until further notice.</p>

**Meeting Schedule** Refer to the Trustee’s website at [www.chi13.com](http://www.chi13.com) for the updated meeting schedule.

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## Procedures for Continued Telephonic §341 Meetings: Debtor Attorneys/Pro Se, Continued

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### Purpose of Zoom Video Conference Meeting

The purpose of the Zoom videoconference meeting is to verify the debtor's identity prior to the §341 meeting. It is **NOT** to conduct the §341 meeting. Therefore, the debtor attorney does not have to be on the videoconference but he/she must review procedures with client prior to the zoom invite. (Cases in which the debtor attorney attends the Zoom or prepares the client have been much more successful.)

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### How to Request a Continued 341 Meeting Video Zoom

Debtor attorney/Pro Se Debtor is **not required** to send an email to request a Zoom videoconference if an Original Zoom Meeting Request was sent in the proper format for the Original 341 Zoom Meeting to avoid duplicate requests and multiple emails. If you never requested a Zoom Meeting, then, read and follow the format outlined in the **Procedures for Telephonic §341 Meetings: Debtor Attorneys** on our website.

**The Zoom Meeting is not set if all the tax returns or other required §341 Meeting documents have not been received timely and processed.**

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### Reply to Missing Documents Email

If you receive an email indicating that tax returns or other documents are missing, then, a Zoom Invite will not be sent. Your §341 meeting will be continued to another date. (Usually 25-30 days out). If you submit the missing required documents prior to the deadline schedule for the §341 meeting request posted on our website, we will make every effort to set another zoom invite but case has to be reviewed and Zoom Meeting slots must be available (We have 32 slots set in 10 minute interval, so, it very hard to reschedule a Zoom invite.)

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## Procedures for Continued Telephonic §341 Meetings: Debtor Attorneys/Pro Se, Continued

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### Missed Zoom Meeting

If you missed your scheduled Zoom Meeting because of technical difficulties, the debtor/debtor attorney did not appear, or any other reason not related to missing required documents, then, the §341 meeting and the Zoom will have to be continued and rescheduled. (Usually 25-30 days out.) Again, you do not have to request a continuance date. Check Pacer for next continuance date and time. If continued dates are not posted on our website, then the meeting has not been continued.

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### Instructions for sending Required Documents

Remember these instructions for sending Required Documents.

Step	Action
1	If your meeting was continued because you did not have the tax returns for all four years, or Affidavit, both the Zoom ID videoconference and the §341 will have to be continued. (The same requirement if the meeting was being held in person.)
2	Follow these instructions to send documents to the Trustee. Do not copy or send documents to client services. Documents cannot be forwarded from the client services email box. Required Documents are only processed from the following email addresses.
3	Please email your most recent paystub to <a href="mailto:payadvices@chi13.com">payadvices@chi13.com</a> , using the subject line: "Payadvices 19 B 12345 Smith DDC"
4	Please email your tax returns to <a href="mailto:taxreturns@chi13.com">taxreturns@chi13.com</a> , using the subject line: "Tax returns 19 B 12345 Smith DDC"
5	Please email your DSO to <a href="mailto:dso@chi13.com">dso@chi13.com</a> , using the subject line: "DSO 19 B 12345 Smith DDC"

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## Procedures for Continued Telephonic §341 Meetings: Debtor Attorneys/Pro Se, Continued

### Instructions for sending Required Documents (continued)

Step	Action
6	§341 Meeting Coordinator will review the case for Tax Returns and Pay Advices before sending the Zoom invite. Also, go to the website to look at the Weekly Meeting Schedule which is posted. If "Tx Rtn" are listed as "Yes", you will receive a Zoom Invite (Only if received prior to deadline.)
6	After the case is reviewed for Tax Returns and Pay Advices, §341 Meeting Coordinator will send an email invite to the debtor, debtor attorney with the following: <ul style="list-style-type: none"> <li>• Zoom Meeting ID</li> <li>• Zoom Date and Time</li> </ul>

### Zoom video conference

Follow these steps for the Zoom videoconference. Review steps and test set up with your client, or send procedures and set up to your client prior to the Zoom Meeting. (Set Up Procedures are on our website and outlined in Original Procedures.)

**NOTE:** The Zoom videoconference is for debtor identification purposes **ONLY!** We will not accept other documents at the videoconference.

Step	Action
1	Approximately 3 minutes prior to the scheduled start of the videoconference, the debtor should log in to the Zoom app. There is no need to login before scheduled time because meetings are scheduled in time slots and you will be waiting for the host. Do not log in late or host will be starting another meeting.
2	Return to the Zoom app on your phone and click the 'Sign In' button
3	Enter your login Email Address and Password

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## Procedures for Continued Telephonic §341 Meetings: Debtor Attorneys/Pro Se, Continued

### Zoom video conference (continued)

Step	Action
4	Click the 'Join' button at the top of the screen; Enter the Meeting ID provided in Step 2 of the previous block labeled "Email to request Zoom teleconference" and click the 'Join' button <i>Note:</i> you MUST make sure the Personal Link Name is your full First & Last name so the Trustee can identify the participant; if the Trustee cannot identify you, you may not be admitted to the Meeting.
5	A Video Preview window will open on your phone; click the blue 'Join with Video' button and you will receive a message indicating that the meeting host will let you in soon.
6	Once the Host (Trustee) is ready for your case and admits you into the Meeting, you will receive a pop-up message instructing you to join the audio in order to hear the other participants; click the 'Call using Internet Audio' button (you must click this button in order for the other meeting participants to hear you)
7	You will be asked to hold up your Picture ID and Social Security verification in front of your camera phone so the Trustee can verify your identity.
8	Trustee will take a screenshot of Picture ID and Social Security verification and save it to the case in TNG.
9	Once the Host (Trustee) has disconnected party from the Meeting, the app should be closed. The debtor attorney should inform the debtor that a confirmation will be sent for the 2 <sup>nd</sup> part of the meeting. Please inform debtor to direct all questions to you. We ask debtors to contact attorney if any questions or inquiries.

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## Procedures for Continued Telephonic §341 Meetings: Debtor Attorneys/Pro Se, Continued

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### Creditors requesting notification of the §341 meeting

Creditors who wish to participate in the §341 meeting should email [clientservices@chi13.com](mailto:clientservices@chi13.com) one day prior to the §341 meeting with the subject line in the following format:

“Case Number: §341 Meeting Request Creditor”

*Example:* “19-12345: §341 Meeting Request Creditor”

The contents of the email request must contain the following:

1. Case Number
  2. Debtor Name
  3. Continued Date of §341 Meeting
  4. Continued Time of §341 Meeting.
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### Notification that §341 meeting ready to be held

§341 Meeting Coordinator follows these steps when the §341 meeting is ready to be held.

Step	Action
1	§341 Meeting Coordinator determines that §341 meeting is ready to be held if: <ul style="list-style-type: none"> <li>• Debtor ID was verified via Zoom</li> <li>• Debtor SSN was verified via Zoom</li> <li>• Pay advices have been received.</li> <li>• Four years of tax returns have been received.</li> <li>• Current taxes have been received.</li> </ul>

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## Procedures for Continued Telephonic §341 Meetings: Debtor Attorneys/Pro Se, Continued

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### Notification that §341 meeting ready to be held (continued)

Step	Action
2	Once it has been determined the §341 meeting is ready, a <b>§341 meeting confirmation email</b> is sent to the debtor, debtor attorney and any creditor with the telephonic call phone number and telephonic call ID to be used on the date and time of the §341 meeting.
3	The hearing officer as representative of Marilyn O. Marshall, Chapter 13 Trustee, will enter the telephonic call and announce the meeting.
4	You may experience a wait time, but the wait will be no longer than if you were in the office appearing in person waiting for your meeting to be called.

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