

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

Purpose Given recent health concerns, the Office of the Chapter 13 Trustee, Marilyn O. Marshall, will be conducting §341 Meetings of Creditors via telephone until further notice. The audio of the meetings will be recorded. A Zoom videoconference will be conducted prior to the meeting for the purpose of verifying the debtor's identity. If any interested party to the proceeding has an objection to the change of format, the Trustee will provide a continued meeting date.

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

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

www.chi13.com Refer to the Trustee's website at www.chi13.com for updated information. Specifically, "Information of Interest to Debtor Attorneys" which can be accessed from the home page.

In This Document Included in this document:

Topic	See Page
Determining the §341 meeting date	2
Debtor attorney email to request Zoom videoconference	3
Zoom videoconference for identification purposes	4
Notification that §341 meeting ready to be held	7

Continued on next page

This document is the property of The Office of Marilyn O. Marshall, Chapter 13 Trustee. The information contained in this document, and any attachments thereto, may be privileged and/or confidential and is intended only for the use of the office of Marilyn O. Marshall. Any dissemination, distribution, or copying of this document, and any attachment thereto, is prohibited. The Office of the Chapter 13 Trustee, Marilyn O. Marshall, is the owner of this document and the information contained in this document cannot be reproduced, disseminated or changed without the express consent of Marilyn O. Marshall.

shares:Marshall Chapter 13 HD:Office Documentation:TNG Documentation:341 training manual:341 Telephonic Procedures DAT_original.doc

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

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

IF your meeting was scheduled...	THEN your meeting will be conducted on...
On or after Monday, April 20, 2020	The date and time on the original notice.

Meeting Schedule Refer to the Trustee's website at www.chi13.com for the updated meeting schedule.

Continued on next page

This document is the property of The Office of Marilyn O. Marshall, Chapter 13 Trustee. The information contained in this document, and any attachments thereto, may be privileged and/or confidential and is intended only for the use of the office of Marilyn O. Marshall. Any dissemination, distribution, or copying of this document, and any attachment thereto, is prohibited. The Office of the Chapter 13 Trustee, Marilyn O. Marshall, is the owner of this document and the information contained in this document cannot be reproduced, disseminated or changed without the express consent of Marilyn O. Marshall.

shares:Marshall Chapter 13 HD:Office Documentation:TNG Documentation:341 training manual:341
Telephonic Procedures DAT_original.doc

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

Email to request Zoom teleconference

Follow these steps to request a Zoom videoconference. Make your requests by **EMAIL ONLY**. The Client Services phone line will be inoperable. **NOTE:** The purpose of the Zoom meeting is to verify the debtor's identity prior to the §341 meeting. It is NOT to conduct the §341 meeting.

Step	Action
1	<p>Five business days prior to the §341 meeting (originals), the debtor attorney will request a Zoom meeting time by sending an email to clientservices@chi13.com with the subject line in the following format: "Case Number: Zoom Meeting Request" <i>Example:</i> "19-12345: Zoom Meeting Request"</p> <p>The contents of the email request must contain the following information in this format:</p> <ol style="list-style-type: none"> 1. Case Number 2. Debtor Name 3. Debtor Email Address 4. §341 Meeting Date 5. §341 Meeting Time 6. Attorney 7. Attorney Email Address <p>Please indicate in your request if a translator will be required.</p>
2	Please email your most recent paystub to payadvices@chi13.com , using the subject line: "Payadvices 19 B 12345 Smith DDC"
3	Please email your tax returns to taxreturns@chi13.com , using the subject line: "Tax returns 19 B 12345 Smith DDC"
4	Please email your DSO to dso@chi13.com , using the subject line: "DSO 19 B 12345 Smith DDC"

Continued on next page

This document is the property of The Office of Marilyn O. Marshall, Chapter 13 Trustee. The information contained in this document, and any attachments thereto, may be privileged and/or confidential and is intended only for the use of the office of Marilyn O. Marshall. Any dissemination, distribution, or copying of this document, and any attachment thereto, is prohibited. The Office of the Chapter 13 Trustee, Marilyn O. Marshall, is the owner of this document and the information contained in this document cannot be reproduced, disseminated or changed without the express consent of Marilyn O. Marshall.

shares:Marshall Chapter 13 HD:Office Documentation:TNG Documentation:341 training manual:341 Telephonic Procedures DAT_original.doc

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

Email to request Zoom teleconference (continued)

Step	Action
5	§341 Meeting Coordinator will review the case for Tax Returns and Pay Advices. The Zoom Meeting is not set if all the tax returns or other required §341 Meeting documents have not been received timely and processed.
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"> • Zoom Meeting ID • Zoom Date and Time

Zoom video conference setup

Here are the instructions to set up the Zoom app for the videoconference. **Note:** This process is relatively simple, but can take a little bit of time so debtors should NOT wait until the day of their hearing to complete this step. The Trustee requests that attorneys test the Zoom video connection with their clients prior to the Zoom videoconference.

Step	Action
1	The debtor(s) will need to download the free ZOOM Cloud Meetings app to their smartphone/tablet from the Apple App Store or Google Play Store and set-up their free account.
2	Once the app is downloaded, click the 'Sign Up' button
3	Enter your Email Address, First Name, and Last Name; click the button agreeing to the Terms of Service; and then click the 'Sign Up' button in the upper right corner
4	A pop-up box will inform you that a confirmation email has been sent to the Email Address that you have provided; Click 'OK'
5	Go to your email inbox and check for the activation email from Zoom and click on the 'Activate Account' button in the email (if you have not received the activation email, check your Spam folder)

Continued on next page

This document is the property of The Office of Marilyn O. Marshall, Chapter 13 Trustee. The information contained in this document, and any attachments thereto, may be privileged and/or confidential and is intended only for the use of the office of Marilyn O. Marshall. Any dissemination, distribution, or copying of this document, and any attachment thereto, is prohibited. The Office of the Chapter 13 Trustee, Marilyn O. Marshall, is the owner of this document and the information contained in this document cannot be reproduced, disseminated or changed without the express consent of Marilyn O. Marshall.

shares:Marshall Chapter 13 HD:Office Documentation:TNG Documentation:341 training manual:341 Telephonic Procedures DAT_original.doc

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

Zoom video conference setup (continued)

Step	Action
6	You will be directed to the Zoom website to create a password; enter a password and confirm the password and then click the 'Continue' button
7	Return to the Zoom app on your phone and click the 'Sign In' button
8	Enter your Email Address and the Password you just created.
9	Test the connection by clicking 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 (Note: you MUST make sure the Personal Link Name is your full First & Last name so the Trustee can identify the participant)
10	If everything was set up correctly, the next screen should show the Meeting ID, the Time and Date of the scheduled Meeting of Creditors; you should also see a spinning wheel notifying you that the app is waiting for the host to start the meeting (now that you have successfully tested your connection and confirmed the Meeting information, you may click the 'Leave' button in the upper right corner of the screen)

Zoom video conference

Follow these steps for the Zoom videoconference.

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

Step	Action
1	Approximately 5 minutes prior to the scheduled start of the videoconference, the debtor should log in to the Zoom app.
2	Return to the Zoom app on your phone and click the 'Sign In' button
3	Enter your login Email Address and Password

Continued on next page

This document is the property of The Office of Marilyn O. Marshall, Chapter 13 Trustee. The information contained in this document, and any attachments thereto, may be privileged and/or confidential and is intended only for the use of the office of Marilyn O. Marshall. Any dissemination, distribution, or copying of this document, and any attachment thereto, is prohibited. The Office of the Chapter 13 Trustee, Marilyn O. Marshall, is the owner of this document and the information contained in this document cannot be reproduced, disseminated or changed without the express consent of Marilyn O. Marshall.

shares:Marshall Chapter 13 HD:Office Documentation:TNG Documentation:341 training manual:341 Telephonic Procedures DAT_original.doc

Procedures for 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 you from the Meeting, you may close the app. Your attorney will contact you if there are any further instructions.

Continued on next page

This document is the property of The Office of Marilyn O. Marshall, Chapter 13 Trustee. The information contained in this document, and any attachments thereto, may be privileged and/or confidential and is intended only for the use of the office of Marilyn O. Marshall. Any dissemination, distribution, or copying of this document, and any attachment thereto, is prohibited. The Office of the Chapter 13 Trustee, Marilyn O. Marshall, is the owner of this document and the information contained in this document cannot be reproduced, disseminated or changed without the express consent of Marilyn O. Marshall.

shares:Marshall Chapter 13 HD:Office Documentation:TNG Documentation:341 training manual:341
Telephonic Procedures DAT_original.doc

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

Creditors requesting notification of the §341 meeting

Creditors who wish to participate in the §341 meeting should contact 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

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"> • Debtor ID was verified via Zoom • Debtor SSN was verified via Zoom • Pay advices have been received. • Four years of tax returns have been received. • Current taxes have been received.
2	Once it has been determined the §341 meeting is ready, a §341 meeting confirmation email 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.

Continued on next page

This document is the property of The Office of Marilyn O. Marshall, Chapter 13 Trustee. The information contained in this document, and any attachments thereto, may be privileged and/or confidential and is intended only for the use of the office of Marilyn O. Marshall. Any dissemination, distribution, or copying of this document, and any attachment thereto, is prohibited. The Office of the Chapter 13 Trustee, Marilyn O. Marshall, is the owner of this document and the information contained in this document cannot be reproduced, disseminated or changed without the express consent of Marilyn O. Marshall.

shares:Marshall Chapter 13 HD:Office Documentation:TNG Documentation:341 training manual:341 Telephonic Procedures DAT_original.doc

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

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

Step	Action
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.

This document is the property of The Office of Marilyn O. Marshall, Chapter 13 Trustee. The information contained in this document, and any attachments thereto, may be privileged and/or confidential and is intended only for the use of the office of Marilyn O. Marshall. Any dissemination, distribution, or copying of this document, and any attachment thereto, is prohibited. The Office of the Chapter 13 Trustee, Marilyn O. Marshall, is the owner of this document and the information contained in this document cannot be reproduced, disseminated or changed without the express consent of Marilyn O. Marshall.

shares:Marshall Chapter 13 HD:Office Documentation:TNG Documentation:341 training manual:341
Telephonic Procedures DAT_original.doc