



THE

MARSHALL CHRONICLES

DECEMBER, 2012
VOLUME XI, NUMBER 12

We Did It!

It was a long time coming but on October 1, 2012, we successfully converted our bankruptcy administration software from our homegrown CaseNET database to The Next Generation, better known as TNG from Bankruptcy Software Specialists (BSS).

With almost three months of using the new software under our belts, it's time to reflect on how far we've come and to anticipate what the future holds.

My first mention of TNG in the Marshall Chronicles came in October, 2009. I shared details of two trips I took to Memphis for TNG training at BSS headquarters. One week was devoted to software overview, and the other was intense training in Crystal Reports. So that tells you we have been preparing for this day for a very long time.

As Ms. Marshall weighed the pros and cons of converting to a new system, many aspects of working with BSS and TNG appealed to her. To be a Trustee operating on the same software system as a great percentage of Trustees across the country, with a national company supporting them was certainly one of them. Working with BSS, however, does not mean you are going to get a cookie cutter solution. We on the conversion team know they have a parameter for everything! The company is flexible and open to new ideas and suggestions when we have "feature requests" to enhance the software. A huge example of that came before we even started work, when BSS came out with a version of their software that is compatible with Apple computers, thus allowing us to maintain the familiarity of our current hardware setup.

The integration that the TNG software exhibits with the bankruptcy court is also phenomenal.

Every aspect of our administration of Chapter 13 bankruptcy cases depends on continuity and connection with the bankruptcy court's

website. Your job has been defined by the documents you have been assigned to process. The docket and document downloads run every night as scheduled tasks. In the morning, as our users log into TNG, they immediately see the work ahead of them as they view their inboxes. Every document that hits our system from the court is assigned to users based on routing rules.

Other areas that benefit from the connection to court are the ability to "add new cases" which creates a new case record with shell information like debtor name and address. "Download creditor matrix" imports the creditor names and addresses from the court and "Get PACER filings" populates tables that identify repeat filers. Obviously we are saving keystrokes by utilizing these features of the software.

The transition from CaseNET to TNG was not always smooth, but under Ms. Marshall's leadership, we knew we would get it done. Part of the reason for the lengthy development and transition period from CaseNET to TNG was Ms. Marshall's insistence on excellence and not accepting an unfinished product. This prepared our team for the onslaught of conversion week. Even though the questions were coming fast and furious, I always felt that I had an answer because we had thought out the entire process for months and months along the way.

An area of the software that exhibits both the features of connectivity to court and BSS's ability to create functionality for us is Task Workflow. As we described our office procedures for entering and verifying claims as well as for reviewing cases for Post-Confirmation Review (PCR), BSS saw the need to develop Task Workflow. Task Workflow allows you to create search criteria and update strings that will run on any data, not just on documents received from court. Notifications are



(Continued on page 2.)

We Did It! *(Continued from page 1.)*

then sent to users' inboxes much like the documents are routed to their inboxes. We have multiple tasks that Ms. Marshall runs every morning to assign cases for PCR Initial, PCR Verification, Petition Entry, Petition Verification, all types of audits, and attorney review sheets. She can even assign stale-dated checks to be worked.

Some of my duties include Identity Address changes like processing change of address forms and claim transfers. It gives me a chance to use the system as a "user" and hopefully gives me some insight into how my fellow employees do their jobs. I can tell you that I love the way the documents for address changes and claim transfers come right to my inbox. A click of the mouse opens the case to the appropriate payee, and I'm able to view the document and make the change all at once. And it's so satisfying to click the "processed" flag and see the number of documents in my inbox go down!

Speaking of Task Workflow leads me to one of my favorite subjects: Case Worksheets. When a user gets a notification



that a case needs a closing audit, for example, one click takes them to the case. The auditor opens the case worksheet for closing audit and begins to audit the case. This flow allows for daily review of cases. Before, we would print a "selection report" and print case audit sheets from which to audit the case. There may have been a weekly flow of how these cases got selected. Now, we are constantly analyzing the data and if something meets the appropriate criteria it will be forwarded to the correct person.

Another example of instantaneous analysis is that each time you go into a case, TNG is determining whether to show you that big red message on the case profile screen "Trustee Paying Current Mortgage." What this means is that as the data changes or conditions are met, we can have the software notify us. We won't need to remember to run a certain report that will find cases for us, we can have items delivered directly to our inboxes.

A different type of worksheet that will soon be incorporated into TNG is an Excel worksheet. I'm working on an Adequate Protection worksheet in Excel that will allow the user to enter a case number and the adequate protection payees and their disbursement history will be pulled from the TNG database into the Excel spreadsheet for manipulation and further analysis. This is another example of integrating all aspects of our work duties into the TNG experience. So if you have to complete an AP worksheet for Ms. Marshall, the tedious data entry part of process will be completed for you. This provides you more time for analysis and reduces the chance of making an error in copying over the numbers from TNG into Excel.

You can see that I seem to be using the words integrate and integration many times in this article. That's the goal. Have most of our software needs met through one software package. Gone are the days of entering Debtor Education registration or In-house check processing in a separate FileMaker Pro database.

As important as it is to automatically receive documents from court, we are equally automated in our ability to file documents at court. This may be the most efficient procedure we

(Continued on page 3.)

THE MARSHALL CHRONICLES	
The Editorial Staff: Cheryl Jones, Aaron Bowles, HVB and Dave Latz.	
Contents and Contributors:	
We Did It!, pgs. 1, 2 & 3	<i>Sandra Pillar</i>
Trustee Matters, pg. 3	<i>Marilyn O. Marshall</i>
December's Notable Events, pg. 3	<i>Dave Latz</i>
In Loving Memory, pg. 4.....	<i>A Tribute to Julia A. Russell</i>
Workflow Structure For Petition And Plan Entry, pg. 5.....	<i>Rosalind Lanier</i>
20 Questions For: Joanna Buda, pg. 5.....	<i>Joanna Buda</i>
By The Numbers: Exercising, pg. 5	<i>CDC, IHRSA</i>
Phone Etiquette, pg. 6	<i>Charles Ward</i>
Internet Tidbit, pg. 6.....	<i>FixYa.com</i>
Organize, Prioritize, Minimize, pg. 6.....	<i>Pam Jenkins</i>
Trivia Quiz Answers: Hail To The Chief, pg. 6	<i>Trivia Quiz</i>
Happy Holidays!, pg. 7	<i>Marilyn O. Marshall</i>
Did You Know: Betsy Ross, pg. 8.....	<i>Trivia</i>
Trivia Quiz: Hail To The Chief, pg. 8.....	<i>Trivia Quiz</i>
Newsletter Information:	
If you would like to contact us or submit ideas or articles for the newsletter, you can do so by:	
✓ e-mailing us at newsletter@chi13.com ,	
✓ dropping your submission or idea in the anonymous newsletter folder located in the mail room, or	
✓ leaving them with Dave Latz.	
Please remember when making a submission to the newsletter, it must be:	
✓ type-written and	
✓ submitted by the third Wednesday of the month via e-mail, a Word document or an ASCII file.	
We also ask that anyone who attends a seminar please be prepared to furnish the committee with a detailed article on its subject.	
You may also view this edition of THE MARSHALL CHRONICLES , as well as all the previously published issues, all in full color, on the Chapter 13 Trustee website at http://www.chicago13.com/ .	

Trustee Matters

10 Things To Know

1. THE TRUSTEE'S OFFICE CONVERTED FROM HOMEGROWN CASE ADMINISTRATION SOFTWARE TO BSS TNG ON OCTOBER 8, 2012.
2. THE TRUSTEE SENDS EFT CREDITORS PAYMENTS TO THE BANK ON THE THIRD WEDNESDAY OF THE MONTH. DISBURSEMENT CHECKS ARE MAILED ON THE THIRD FRIDAY.
3. THE TRUSTEE CANNOT LOG INTO THE SYSTEM ON THE THIRD WEDNESDAY OF THE MONTH BECAUSE OF DISBURSEMENT PROCESSING.
4. THE TRUSTEE CLOSED THE END OF THE MONTH OF NOVEMBER WITH 14,463 CASES.
5. THE TRUSTEE WILL CONTINUE A \$341 MEETING EVEN WHEN ALL THE DOCUMENTS ARE NOT AVAILABLE TO REVIEW PRIOR TO THE SCHEDULED MEETING.
6. DOCUMENTS SENT TO THE ADDRESSES LISTED BELOW ARE AUTOMATICALLY DOWNLOADED INTO THE CASE. IF THE WRONG CASE NUMBER IS PROVIDED, IT WILL BE DOWNLOADED INTO THE WRONG CASE AND HAVE TO BE RESUBMITTED. ALWAYS CHECK THE CASE NUMBERS:

payadvices@chi13.com
taxreturns@chi13.com
dso@chi13.com

7. EACH PLAN FILED HAS TO BE REVIEWED AND INFORMATION ENTERED INTO THE SYSTEM. IF YOU FILE MODIFIED PLANS, EACH HAS TO BE COMPARED TO THE FIRST PLAN OR SUBSEQUENT PLANS IN ORDER TO KNOW WHAT CHANGES TO MAKE.
8. EVERY WORD IN SECTION G OF THE PLAN HAS TO BE READ AND REVIEWED AND PROCESSED MANUALLY BECAUSE IT IS A CHANGE TO THE MODEL PLAN.
9. WHEN A DEBTOR ATTORNEY'S FEES ARE CHANGED TO BE PAID AT A DIFFERENT LEVEL THEN THE PRIORITY LISTED IN SECTION 8 OF THE PLAN, THEN THE PAY LEVEL HAS TO BE MANUALLY ENTERED.
10. POST CONFIRMATION REVIEW (PCR) IS PERFORMED ON EVERY CONFIRMED CASE AS AN AUDIT TO MAKE SURE CASES WILL DISBURSE PROPERLY.

Marilyn O. Marshall, Trustee



We Did It!

(Continued from page 2.)

have as far as a time saving feature. Case Analysts and Closing Specialists can generate Trustee motions, Final Reports and Notice of Completion of Plan Payments that are put in a queue to be automatically filed with the court's website.

Our communication with the outside world has also been revamped. Debtor attorneys who send their clients' pay advices, tax returns and DSO affidavits via our designated email addresses can be assured that these items are being read and indexed directly to their cases, given that the proper naming conventions are in place. The documents are then routed to the appropriate user for processing.

Again, communication goes both ways, and the Crystal reports we have uploaded to TNG can be emailed to internal or external email addresses upon generation.

The Chapter 13 Trustee website is the same, but our inquiry database now points to 13network. This removes a burden of administration from our office, but continues to provide inquiry capabilities to the bankruptcy community.

I know I've painted a rosy picture of our conversion to TNG and all of its power, potential and efficiency. I am aware of the work that still remains. I am conscious of the fact that our staff has worked diligently to get up to speed on all of the features and designs in our new system. Leading up to conversion, I had a regular weekly schedule of training that included each department. I would like to reinstate that schedule so that we can touch base on how our jobs are going. What's working for you and what is not? All software designers know that the best ideas and innovations come from the users of their product. If you have plans and ideas, let me know and we can make TNG an even greater tool for the trusteeship.

Sandra Pillar, I.T. Analyst



January's Notable Events

New Year's Day on January 1st (the office will closed).

Happy Birthday to **Donna Eubanks** on January 3rd!

Happy 2nd Anniversary to **Kimberly Harris-Broomfield** on January 3rd!

Bird Day on January 5th.

Happy 26th Anniversary to **Rosalind Lanier** on January 5th!

National Clean Off Your Desk Day on January 14th.

Happy 12th Anniversary to **Juliana Dunklin** on January 16th!



Ditch New Year's Resolutions Day on January 17th.

Thesaurus Day on January 18th.

Happy Birthday to **Darlene Odom** on January 21st!

Martin Luther King, Jr. Holiday on January 21st (the office will closed).

Inauguration Day on January 21st.

Chocolate Cake Day on January 27th.

Happy 5th Anniversary to **Maude Tetteh** on January 28th!

Bubble Wrap Appreciation Day on January 28th. **2013**



In Loving Memory Julia A. Russell

Secretary OA, U.S. Trustee's Office, Chicago
June 4, 1936 – November 23, 2012



Now the day is over,
Night is drawing nigh,
Shadows of the evening
Steal across the sky.

Jesus, give the weary
Calm and sweet repose;
With Thy tenderest blessing
May mine eyelids close.

Through the long night watches
May Thine angels spread
Their white wings above me,
Watching round my bed.

When the morning wakens,
Then may I arise
Pure, and fresh, and sinless
In Thy holy eyes.

“Come on now – Heaven Ain’t so Bad!”
Harv Russell

Gone, but never forgotten.

**Case Administration
Workflow Structure
For Petition And
Plan Entry**



Now that we have made the transition to TNG, there have been a few questions concerning who does the processing for the plan and who does the processing for the petition. Each document filed at the court is routed to a staff member's individual in-box for processing. For example, the original plan is a document that is processed or referred to by multiple users but only routed to the front entry team (Stephanie/Terry). The front entry team receives the plan so they can record the plan terms, sets-up the pay schedules and notates the case if the plan provides payroll. A separate workflow process is generated by the payroll department to select all the cases that need a payroll order.

The petition is routed to the Case Administrators who download the creditor matrix then open the plan from the documents tab to set-up the debt treatment for each creditor in the case. If the original filing did not include the plan or all the schedules, then the Case Administrator will hold the document in their in-box and select a status such as no plan or no schedules. Once the missing documents are filed with the court, then they may or may not be routed to the staff person that received the initial information. Whoever receives the missing documents will notify the initial person if they should happen to get the documents assigned to them.

Once the petition has been entered and verified, then it is forwarded to a staff attorney to conduct a pre-§341 meeting review. The review notes are stored on a worksheet in the case and will be used by the person conducting the §341 meeting to inform the debtor's attorney of any issues that need to be resolved prior to the confirmation hearing. Amended plans or schedules are routed to the Case Analyst for processing.

You can always check the documents tab to see who is or was assigned to do the processing for a petition or plan.

Rosalind Lanier, Case Analyst Claims

**20 Questions For:
Joanna Buda**



Office Title: Case Administrator
If you could have named yourself, how would your name appear on your birth certificate? I like my name and would not change it.

If you could build a house anywhere in the U.S., where would it be? The San Francisco Bay area.

When you were a kid, what profession or job did you want to have when you grew up? Teacher.

If they made a movie about your life, what current actor/actress would play you? Candace Cameron from Full House.

What is your least favorite household chore? Ironing.

What are your favorite books? Lots of history books.

If you could bring anything back from your childhood, excluding people, what would it be? My red rain-boots to splash the puddles with when it rained.

When you were growing up what was your favorite...

Hair style/haircut? High ponytail.

Cartoon? Smurfs.

Cereal? Cornflakes with fruit – we ate healthy in Europe.

Sport? Volleyball.

Subject in school? English and history.

Author? Henryk Sienkiewicz and Agatha Christie.

Singing group? New Kids on the Block.

Video game? Super Mario Bros. game.

Family outing? Vacationing in the mountains.

Movie? Robin Hood with Kevin Costner.

If you wanted to be cool: Hang out with my older, cooler cousins.

I always wanted: Barbie's dream house.

Now that I'm older I wish: I wish I did not get older.

By the Numbers: Exercising

- ☽ Only 47 percent of American adults met common physical activity guidelines for aerobic physical activity.
- ☽ 77 percent of personal trainers are male.
- ☽ There are almost 30,000 health clubs in the United States.
- ☽ Each year, the health club industry generates \$9.7 billion in revenue and employs about 308,000 workers.

Source: CDC, IHSA



**Legal
Phone Etiquette**

During our office’s public hours we are more than happy to answer questions from the many Chapter 13 debtors that we disburse for. The staff is quite knowledgeable and will do whatever they can to help a caller. However, there are few pointers to keep in mind that can help during a phone call:



- ☞ When calling, it is useful for the debtor to have their case number ready so that our staff responder can look up the case easier. The case can be found using a last name or social security number, but the case number is the best way to find the information for a caller.
- ☞ Please remember that the Trustee’s Office does not give out legal advice to anyone. If the debtor has a legal question, recommend that they call their attorney and ask them. The Trustee’s office is in charge of disbursing for Chapter 13 cases. We do not represent any debtors or provide counsel to outside parties. Directing any legal questions to their attorney will get an answer to their question and also let the representing attorney know what the their questions and concerns may be about the case.

These two simple rules can help both the caller and our responder be more efficient during a phone conversation. If the debtor wants to see their bankruptcy case information, here is a helpful website: <http://www.13datacenter.com>. This website is a national database for bankruptcy cases and can be viewed at anytime the debtor has access to the Internet. It is a great resource for anyone who wishes to see what’s going on in their Chapter 13 case.

Charles Ward, Case Analyst

**Internet
Tidbit**

If you have a problem, FixYa.com has the solution. FixYa is a troubleshooting community of people who can help you solve your product problems. If you need help and ideas to fix your electronics, appliances, car, and more, FixYa can connect you to someone who has the answer. Over 20 million people visit the website each month. You can search for an answer to a problem or ask a question. Either way, the assistance you receive is free. This is a great help when you find that customer service for your product is lacking.



**Financial
Organize,
Prioritize,
Minimize**

Does it seem as if your In-Box has reached soaring numbers? Has the to-do-list gotten longer than the standard 8½" x 11"? Do the emails and phone calls have you wondering if you’ve become the most popular person lately?



Don’t become overwhelmed. Take control by organizing and prioritizing, thereby minimizing stress and mistakes and reap increased work productivity.

Organize: Organize your email inbox, clean and clear unnecessary paper and clutter. Remember a cluttered desk is a cluttered mind.

Prioritize goals. Goals should not be so low that you easily accomplish them with little or no effort, yet not so high that the goal is impossible to accomplish. Schedule goals: Daily, weekly, by the month’s disbursement day.

Minimize distraction and disruptions. Check and respond to emails and phone messages periodically during the day (unless urgent) so that you do not lose your place or thought process.

According to the Mayo Clinic (<http://www.mayoclinic.com/health/time-management/WL00048>):

- ❖ Effective time management is a primary means to a less stressful life and improved productivity.
- ❖ Doing work right the first time may take more time up front, but errors usually result in time spent making corrections, which takes more time overall.

Think positive. Tell yourself, “inch by inch and it’s a cinch! You can master your task.”



**Trivia Quiz
Answers:
Hail To The Chief**








1. Franklin D. Roosevelt.
2. Warren Harding.
3. Abraham Lincoln.
4. New York City.
5. Harry Truman.
6. Chief Justice John Marshall.
7. Ronald Reagan at 69 years of age.
8. U.S.S. Constitution.
9. Lyndon Johnson.
10. Immediately before the president.







*Merry Christmas and Happy New Year
to everyone here at the
Office of the Chapter 13 Trustee,
to your families, and to all in
the bankruptcy community!
Have a joyous and safe holiday season!*



Did You Know: Betsy Ross

-  Paul Revere and Betsy Ross shared a birthday. He was born January 1, 1735, and she was born January 1, 1752.
-  Betsy had a regular pew at Christ Church in Philadelphia. Opposite this was the pew where George Washington sat when attending the church.
-  Besides getting credit for sewing the first American flag, Betsy Ross also ran a munitions factory out of her basement.
-  Betsy Ross came from a very large family. She had 16 brothers and sisters. She was the 8th out of those 17 kids.
-  Betsy Ross had seven girls, but only five lived to adulthood.



-  Betsy married her first husband, John Ross, after eloping in November 1773. On their marriage certificate is the signature of William Franklin, governor of New Jersey and son of Benjamin Franklin.
-  With her first husband, she opened up an upholstery business.
-  Betsy's father, Samuel Griscom, helped build the bell tower at the Pennsylvania State House, also called Independence Hall.
-  When she died, her full name was Elizabeth Griscom Ross Ashburn Claypoole. Griscom was her maiden name. Ross, Ashburn, and Claypoole were the last names of her husbands in order.



**OFFICE OF THE
CHAPTER 13 TRUSTEE
MARILYN O. MARSHALL**
224 S MICHIGAN AVE STE 800 CHICAGO IL 60604-2500

**The Marshall Chronicles is now available in full color,
both in print and on-line at www.chicago13.com**

Trivia Quiz: Hail To The Chief

Since the official inauguration date falls on a Sunday this year, the presidential inauguration is on January 21st. Test how much you know about the presidency with this fun trivia quiz! *(The answers are on page 6.)*

1. Who was the first president to be inaugurated on January 20?
2. Who was the first president to travel by car to and from the inaugural ceremony?
3. At his inauguration, Teddy Roosevelt wore a ring with a strand of which former president's hair?



4. Where was George Washington inaugurated?
5. Which president was the first to have his inauguration televised?
6. Which chief justice of the Supreme Court administered the oath the most times?
7. Who was the oldest president at his inauguration?
8. Martin Van Buren rode to his inauguration in a carriage constructed from the timbers of what famous ship?
9. Which president was inaugurated on an airplane?
10. When is the vice president sworn in?

