

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

Purpose The Office of the Chapter 13 Trustee, Marilyn O. Marshall, will be conducting §341 Meetings of Creditors via **ZOOM** videoconference until further notice. The office previously conducted telephonic §341 meetings. Per the United States Trustee, Trustees can continue to operate offices remotely and this office will remain closed to the general public but perform normal business operations.

Effective Date This policy is effective Monday, May 2, 2022 and is subject to change. Please refer to the **Zoom Meeting Deadline** on our website.

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 |
|--|----------|
| Instructions to complete the Zoom Videoconference Form | 2 |
| Requirements for Debtor attorney to email completed Form | 3 |
| Creditors requesting notification of the §341 meeting | 4 |
| Email notification that §341 meeting has been scheduled | 5 |
| Zoom setup | 6 |
| Zoom videoconference §341 meeting | 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.

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

Debtor attorney completes fillable pdf form Follow these steps to complete the “Zoom Videoconference Form,” referred to as **THE FORM**. This is a fillable PDF form.

| Step | Action |
|------|--|
| 1 | Enter the following information on the appropriate line on Page 1. <ol style="list-style-type: none"> 1. Debtor case number (It will auto-populate the case number at the top of page 2.) 2. Debtor name 3. Date of §341 meeting 4. Time of §341 meeting 5. Debtor attorney/firm name |
| 2 | On line 6 of the form, check the box for the location of the debtor during the meeting (with the attorney or separate from the attorney.) |
| 3 | On line 7 of the form, check the box to indicate whether or not a translator is needed for the meeting. Indicate the Language. |
| 4 | Have the debtor and joint debtor sign the form on Page 1. |
| 5 | Debtor attorney signs the form on Page 1 |
| 6 | On Page 2, line 8, indicate the form of identification supplied by the debtor and enter the ID number. |
| 7 | Make a copy of the debtor’s ID. |
| 8 | On line 9, indicate the document containing the debtor’s full social security number . |
| 9 | Make a copy of the document containing the debtor’s SSN. |
| 10 | Debtor Attorney signs the bottom of Page 2. <i>Note:</i> if you are a Pro Se debtor, this form must be notarized. |
| 11 | Prepare the completed form and copies of ID and SSN for emailing to the Trustee by scanning them together as one PDF document . |

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.

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

Debtor attorney emails completed form with attachments Important information regarding emailing the completed “**Zoom Videoconference Form**” with attached debtor identification and debtor social security number to the Trustee.
NOTE: Failure to follow the requirements below may result in failure to schedule the §341 Meeting.

| Email Requirement | Description |
|-------------------------------------|---|
| Email Deadline: | Email the Trustee no later than seven (7) business days prior to the §341 Meeting. |
| Trustee’s Email address to send to: | ZoomVideoconferenceForm@chi13.com |
| Email Subject Line: | “Case Number: Zoom Videoconference Request LastName” Example: “22-12345: Zoom Videoconference Request Smith” |
| Email Body: | Body of email must contain the debtor attorney’s email address and the debtor’s email address. Example: <ul style="list-style-type: none"> - Debtor attorney email: debtorattorney@attorneyfirm.com - Debtor email: johndoe@gmail.com |
| Email Attachment | Attach the completed “Zoom Videoconference Form” with attached debtor identification and debtor social security number |

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.

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

Required documents

The debtor attorney and/or the debtor emails required documents to the Trustee **no later than seven (7) business days prior to the §341 Meeting.**

- Please email your most recent paystub to payadvices@chi13.com, using the subject line: “Case Number Payadvices LastName.”
Example: “22-12345 Payadvices Smith.”
 - Please email your tax returns to taxreturns@chi13.com, using the subject line: “Case Number Tax Returns LastName.”
Example: “22-12345 Tax Returns Smith.”
 - Please email your DSO to dso@chi13.com, using the subject line: “19 B 12345 DSO LastName.”
Example: “22-12345 DSO Smith.”
-

Creditors requesting notification of the §341 meeting

Creditors who wish to participate in the §341 meeting should contact clientservices@chi13.com **five (5) business days** 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. Date of §341 Meeting
4. Time of §341 Meeting.

The creditor will receive the Zoom Meeting Link and Zoom Date and Time and login time at least three (3) business days prior to the scheduled meeting if the debtor/debtor attorney has satisfied all requirements to conduct the meeting. Meetings scheduled for the current week can be found on the home page of our website, www.chi13.com, at the link labeled “Click Here for §341 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.

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

Trustee review of form and required documents

§341 Meeting Coordinator reviews the case documents, including the Zoom Videoconference Form, Tax Returns and Pay Advices. **The §341 Meeting is not set if “THE FORM” and all required §341 Meeting documents have not been received seven business days before the meeting date.**

Meeting Coordinator sends email invite

After the case is reviewed for form and required documents, the Meeting Coordinator sends email invite at least **three (3) business days** prior to the meeting to the debtor and debtor attorney with the following:

- Zoom Meeting Link
- Zoom Date and Time
- **Zoom Login Time**

Note: The email displays the §341 Meeting time and a **Login Time**. The Login Time is the approximate time your §341 meeting will be called since other meetings are also scheduled at the same time. We issue login times to reduce the amount of time you are waiting. However, **DO NOT** log in too early and **DO NOT** log in too late for the §341 meeting because other meetings are being held in specific time slots.

ALSO: The email invite will be coming from one of the following email addresses. Check your spam or junk folder if you have not received the email invite.

- zoommeetingroomA@chi13.com
- zoommeetingroomB@chi13.com
- zoommeetingroomC@chi13.com
- zoommeetingroomD@chi13.com

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.

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

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) |
| 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) |

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.

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

Zoom video conference setup (continued)

| Step | Action |
|------|---|
| 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 §341 Meeting

Follow these steps for the Zoom videoconference §341 Meeting.

NOTE: Please keep in mind you may not be heard at your exact meeting time, so please wait for your meeting to be called.

| Step | Action |
|------|---|
| 1 | Approximately 5 minutes prior to the log-in time 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 |
| 4 | Click the 'Join' button at the top of the screen; Enter the Meeting ID provided on Page 2 in the block labeled "Meeting Coordinator Sends Email Invite" 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. |

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.

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

Zoom video-conference §341 Meeting (continued)

| Step | Action |
|------|--|
| 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 | The hearing officer as representative of Marilyn O. Marshall, Chapter 13 Trustee, will conduct the meeting. |
| 8 | 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. |

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.