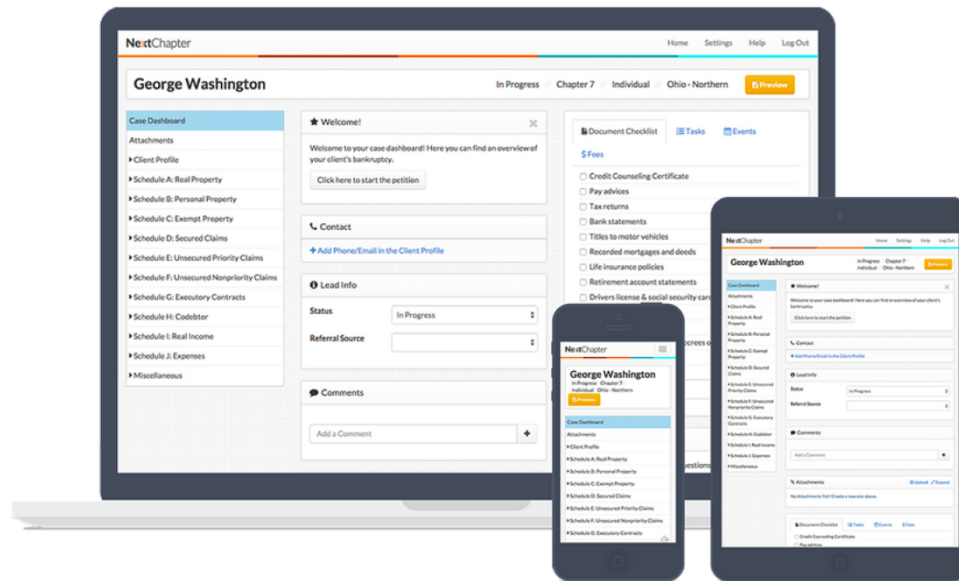


Client Intake & Case Management Tools

NextChapter's innovative dashboards make it easier than ever to intake, prepare and manage your bankruptcy cases all in one.



Client Intake

Many user's find NextChapter's layout so intuitive and easy to use, that they will enter their client's information into the system during the client interview. Here's a suggested list of sections to cover while conducting the client interview:

- **Case Dashboard:**
 - Enter the client's contact information .
 - Add any important notes in the comments section for the attorney or paralegal to review.
 - Check off all documents provided by the client in the Document checklist.

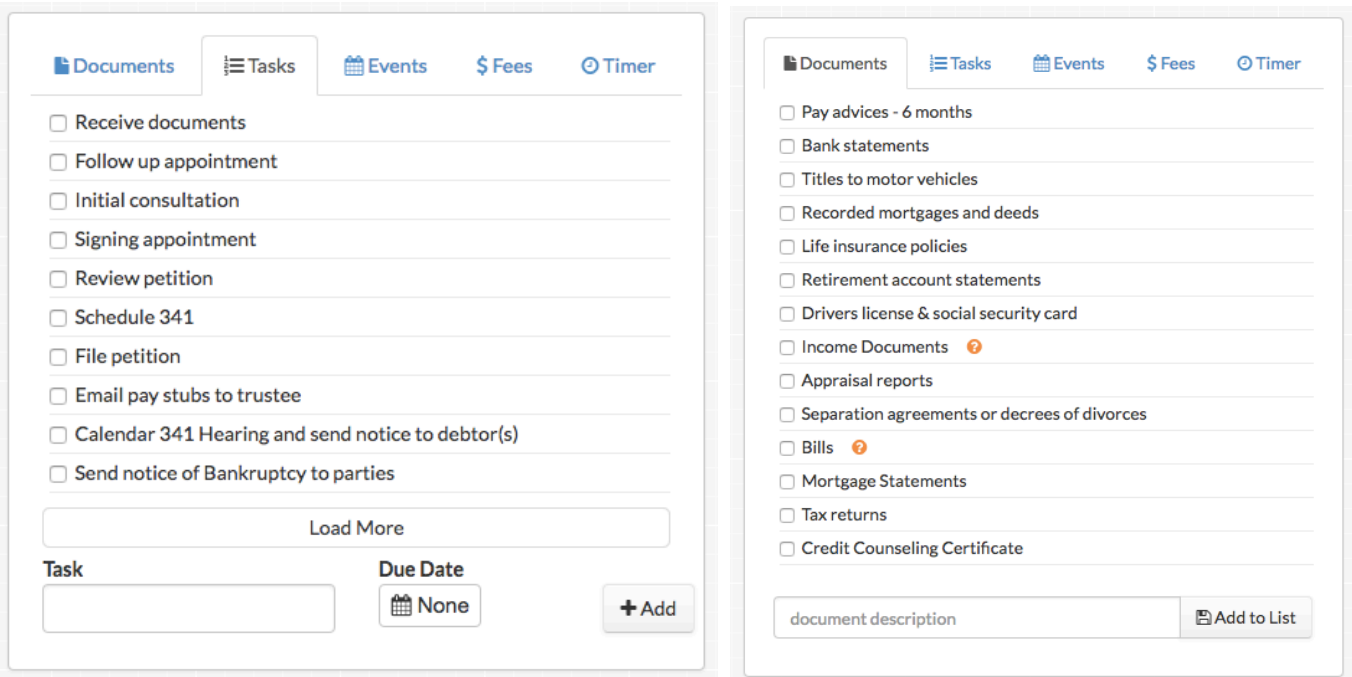
- Check off any completed tasks and add any new tasks that will be needed in the Task checklist.
- **Additional Documents:**
 - If the debtor has emailed or provided hard copies of any documents needed, the documents can be scanned and saved directly into the case under Client Document Storage.
- **Credit Report:**
 - If your firm is set up with the Credit Report Integration in NextChapter, you can pull the client's creditor report to provide to them during the initial meeting.
- **Client Profile**
 - Enter the basic case information like the type of debtor and district.
 - Find out if the debtor has any hazardous property or if the debtor is a tenant of a residential property.
 - If the debtor has completed the credit counseling course, you can collect the certificate to be filed with the court and enter when the course was completed.
 - Ask and complete all questions in the Debtor Profile and Joint Debtor Profile (if applicable) sections.
 - Add the debtor's residential address and any mailing or prior addresses
 - If the debtors have dependents, add their relationship and ages under the Spouses & Dependents section.

- **Real & Personal Property**
 - Go through each of the categories in the Real & Personal Properties sections to add in all the debtor's assets
 - Enter as much information as the debtor can provide during the interview. You can go back through later to fill out any additional information and add in exemptions to the assets.
- **Income**
 - Many attorneys will enter the income that the client provides during the initial meeting or they will enter an estimate to run a quick Means Test Qualifier.
- **Expenses**
 - Ask the debtor how much they spend on each item per month in the expense section in each category.
 - These amounts can be adjusted as needed later once the full income has been entered.
- **Means Test**
 - Ask the first two questions to see if there is an exemption from the presumption of abuse.
 - If income has been entered, you can click on the Means Test Qualifier to find out whether the means test will apply in this case.

Case Management Tools

Checklists – Documents & Tasks

NextChapter provides a pre-set list of documents and tasks in the Case Dashboard for each case. These lists can be updated as needed on a per-case basis to meet each case’s specific scenario.



In your settings page, the default lists can be updated firm-wide to include standard documents and tasks that your firm needs for all cases. In each list, you can reorder the items, rename any items, delete items, or add new items.

Attorney's Firm

- My Firm
- My User Profile
- User Accounts and Invites
- Billing
- Credit Report Integration
- Clio Integration
- Exemptions
- Common Creditors
- Firm Created Forms
- Monthly Goals
- Default Tasks**
- Default Document Checklist
- Default Fee Categories
- Attorney Fee Disclosure Statement

Default Case Task List

These are the tasks that will automatically populate a newly created Case.

Receive documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Initial consultation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Follow up appointment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Signing appointment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Review petition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schedule 341	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
File petition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email pay stubs to trustee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Calendar 341 Hearing and send notice to debtor(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Send notice of Bankruptcy to parties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
File post petition counseling course (Form 23)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
File reaffirmation agreements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Send Notice of Discharge to debtor(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Close file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

New Task

Events

Keep track of upcoming meetings, hearings and events through the Events tab in each case. All upcoming events for all cases will also be listed on the firms dashboard.

[Documents](#) [Tasks](#) **[Events](#)** [Fees](#) [Timer](#)

Initial Client Meeting 3 hours ago

341 Hearing 1 day from now

to

[Add a Description](#)

Firm Dashboard

Your firm dashboard gives you an overview of your entire practice. See pertinent deadlines in each client file or review important matters requiring attention.

☰ Upcoming Tasks

Initial consultation 02/24/2017 [Sample, Steve](#) Hide Case Specific Tasks

341 Meeting 02/24/2017 [Demo, Bob](#)

Signing appointment 03/10/2017 [Minion, Marie](#)

Receive documents 03/17/2017 [Minion, Marie](#)

File reaffirmation agreements [Sample, Steve](#)

Send Notice of Discharge to debtor(s) [Sample, Steve](#)

Close file [Sample, Steve](#)

Follow up appointment [Minion, Marie](#)

Review petition [Minion, Marie](#)

File petition [Minion, Marie](#)

Load More

Task	Case	Due Date	
<input type="text"/>	Not Case Specif ▾	<input type="text" value="None"/>	<input type="button" value="+ Add"/>

📅 Calendar

Firm-wide Office Meeting 2 days from now

to

[✎ Add a Description](#)

