



**GUIDE TO ONLINE BANKRUPTCY  
CLIENT QUESTIONNAIRE**

Consumer Bankruptcy Project  
City Bar Justice Center

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## About the Client Questionnaire

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- MyCaseInfo® is an online bankruptcy client questionnaire used by the Consumer Bankruptcy Project and its volunteers to gather the necessary information from clients in order to complete a draft of the clients' official bankruptcy forms.
- The questionnaire has been designed to guide you step-by-step through entering required bankruptcy information to send to (CBP).
- When you start a section, you will see a description of the section detailing the information that will be gathered as well as specifying what documents you need handy to help you complete the section.
- You will be guided through yes and no questions to easily enter information that only applies to your client.

## Accessing the Client Questionnaire

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- Go to [www.mycaseinfo.com](http://www.mycaseinfo.com)
- Enter client's username and password  
Username: firstnamelastname@nycbar.org  
Password: consumer7



## Starting the MycaseInfo® Questionnaire

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### Top Screen Tabs

- There are screen tabs that divide the questionnaire questions into categories: Personal Information, Income, Property, Debts, Expenses, and Miscellaneous.

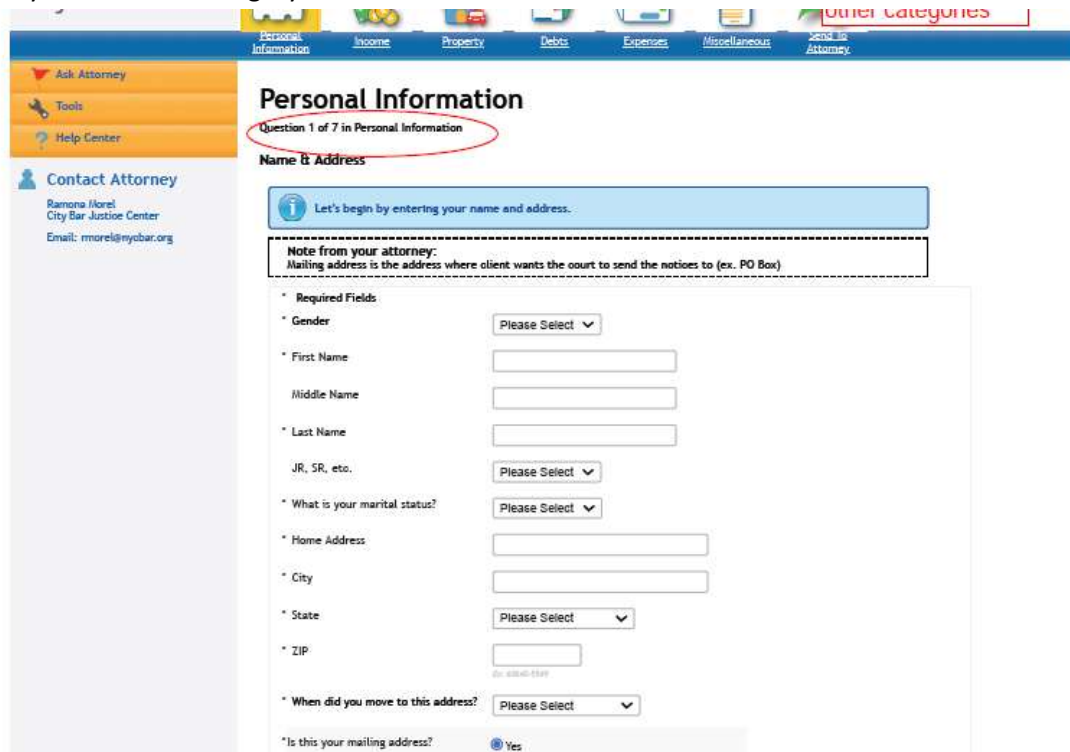
- The tabs at the top of the screen allow you to easily go from one section of the questionnaire to another. See picture below.

- You must complete the personal information first before you can go to another tab/category.



### Answering Questions & Inputting Information

- You will be guided through yes and no questions to easily enter information that only applies to your client.
- Click Get Started to begin a section. See Diagram above.
- Each section has a number of questions. You will see how many questions are in the section when you start that category.



- Some questions will repeat to allow to include additional information pertaining to that question. For example, “do you have a dependent?” might repeat after you hit “yes” to allow to you input information on a second dependent.
- At the end of each section/category, you will note a “Comments” box.
- Here you can add any issues or additional data you think the CBP should be aware of. See blue arrow in Diagram C.
- Once you have completed filling out the information for a question, click Save. If you want to go back to the previous screen, click Cancel. See Diagram C.

## Personal Information

Question 7 of 7 in Personal Information

Do you support anyone financially?

Enter each record separately. After clicking save, you will have the opportunity to add additional items.

\* Required Fields

What is their name?

Note: Do NOT include a name for any dependents under the age of 18

\* How old is this person?

\* Brief description of your relationship to dependent

(Father, Grandfather, etc.)

Comments

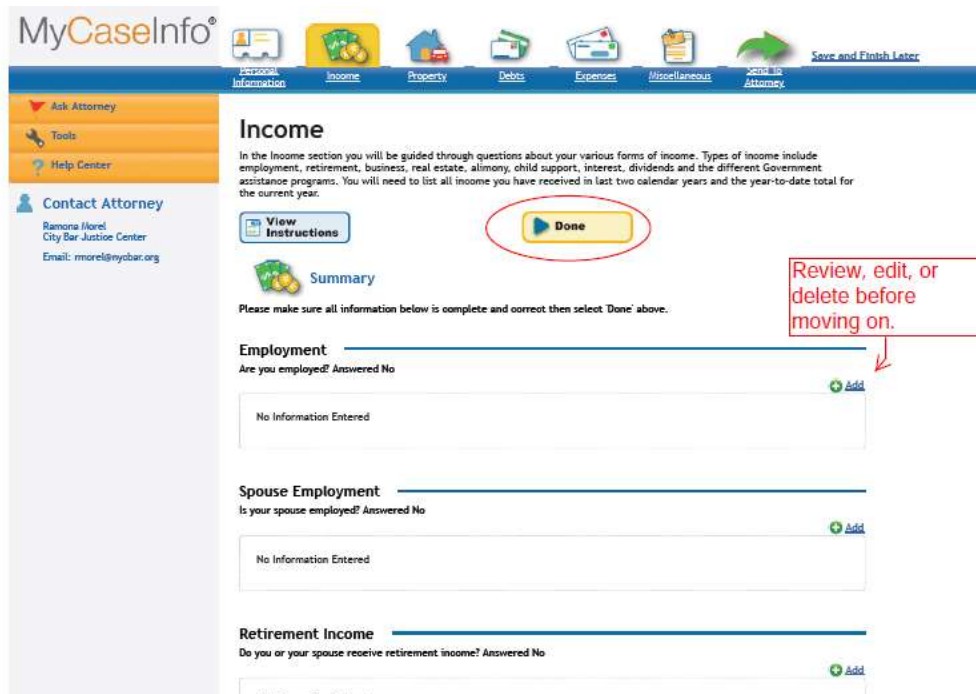


Save this information for now and return to it later

Save

Cancel

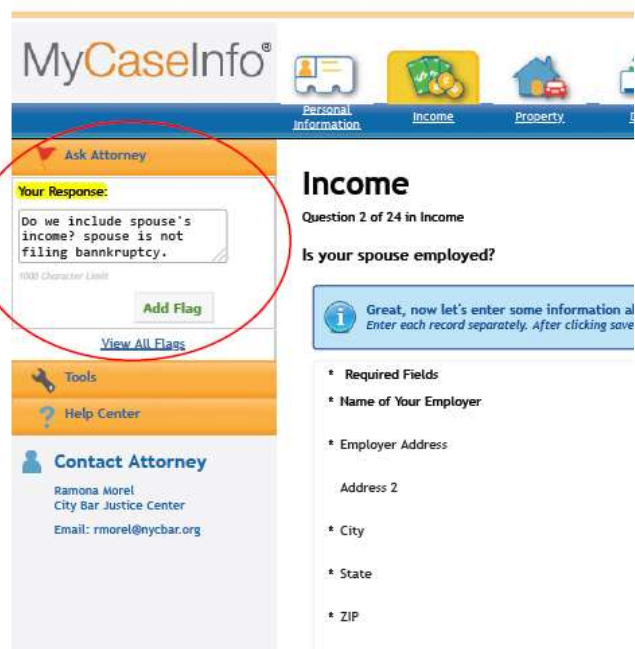
- Once you have reached the end of the section, you will be able to review, edit, delete or add another record for each question before moving on to the next section. Hit Done.



## Support and Help from CBP

### Flagging CBP for help

- While completing the questionnaire, you may have a question regarding whether a particular question applies to the client or what kind of information you should input.
- By using Flags, you can easily correspond with the Bankruptcy Project on specific questions without leaving MyCaseInfo.
- You can also use the flag to request CBP to enter the remote clinic room.
- Click Flags on the left sidebar.
- Enter your question into the space provided and click Add Flag.
- CBP will be notified of your question and will respond as quickly as possible.



- To view CBP’s response, click View All Flags in the Flag window. A window will open up displaying all of your flagged questions along with any responses from CBP.

9/2/2020

The screenshot shows the 'MyCaseInfo' interface. At the top, there are navigation tabs for 'Personal Information', 'Income', and 'Property'. The 'Income' tab is active, displaying 'Question 2 of 24 in Income'. The question is 'Is your spouse employed?'. Below the question, there is a blue information box that says 'Great, now let's enter some information. Enter each record separately. After clicking s'. To the right of the question, there is a list of required fields: 'Required Fields', 'Name of Your Employer', 'Employer Address', 'Address 2', and 'City'. On the left side, there is an 'Ask Attorney' section. Under 'Note To Attorney', it says 'Do we include spouse's income? spouse is not filing bankruptcy.' Below this, there is a 'Responses' section with a red circle around the text 'yes, only if living together.' by Ramona Morel on 09/02/2020. There is also a 'Your Response:' text area with a '1000 Character Limit' and a 'Respond' button. At the bottom of the 'Ask Attorney' section, there is a 'View All Flags' link.

### Questionnaire hints

- CBP has added additional information or questionnaire hints to assist you in completing the questionnaire. Hints can appear on the question screen or on the information entry screen in the “Note from your Attorney” box as shown in Diagram D.

The screenshot shows the 'MyCaseInfo' interface. At the top, there are navigation tabs for 'Personal Information', 'Income', 'Property', 'Debts', 'Expenses', 'Miscellaneous', and 'Ask to Attorney'. The 'Personal Information' tab is active, displaying 'Question 1 of 7 in Personal Information'. The section is titled 'Name & Address'. Below the title, there is a blue information box that says 'Let's begin by entering your name and address.' Below this, there is a 'Note from your attorney:' section with a red circle around the text 'Mailing address is the address where client wants the court to send the notices to (ex. PO Box)'. Below the note, there is a list of required fields: 'Required Fields', 'Gender' (with a dropdown menu set to 'Please Select'), 'First Name', 'Middle Name', and 'Last Name' (each with a text input field). On the left side, there is an 'Ask Attorney' section with a 'Tools' button and a 'Help Center' button. Below this, there is a 'Contact Attorney' section with the name 'Ramona Morel', 'City Bar Justice Center', and 'Email: rmorel@nycbar.org'.

## Entering Debt Information

- The clients have been asked to make a creditor list so that they can either provide to you or read off to you in order to complete this section.

9/2/2020 MyCaseInfo: Debts

MyCaseInfo®

PERSONAL INFORMATION Income Property Debts Expenses MISCELLANEOUS Save to Attorney

Ask Attorney Tools Help Center

Contact Attorney  
Ramona Morel  
City Bar Justice Center  
Email: rmorel@nycbar.org

### Debts

Question 1 of 24 in Debts

Do you or your spouse have or are you or your spouse authorized to use any credit cards?  
Including store cards and gas cards.

Yes No

- When entering debt information for client, enter only the required fields.
- If you do not have an address for the creditor, enter the generic address: 123 ABC St. NY NY 10001. See Diagram

MyCaseInfo®

PERSONAL INFORMATION Income Property Debts Expenses MISCELLANEOUS Save to Attorney

Ask Attorney Tools Help Center

Contact Attorney  
Ramona Morel  
City Bar Justice Center  
Email: rmorel@nycbar.org

### Debts

Question 1 of 24 in Debts

Do you have or are you authorized to use any credit cards?

OK let's get some information about your credit cards.  
Enter each record separately. After clicking save, you will have the opportunity to add additional items.

Required Fields

Type of Card: Credit Card

Who is the account holder?: Self

Who issued the card? Ex: Citibank Visa, Discover, Macy's, etc.: Discover

Address 1: 123 ABC Street

Address 2:

City: New York

State: New York

ZIP: 10001

What is the account number?: 5632

When did you open this account?: [month] / [day] / [year]

When did you last use this card?: [month] / [day] / [year]

Brief description of the account and any remarks:



- Once you entered the information for the creditor, question #1 will repeat itself so that you can enter the next creditor.
- Click yes. Enter the next creditor information.
- Once you have finished entering each creditor, hit No to get to question #2 in the Debts category.

**MyCaseInfo**

Personal Information | Income | Property | **Debts** | Expenses | Miscellaneous | Documents | Services Attorney

Ask Attorney  
Tools  
Help Center

Contact Attorney  
Ramona Morfi  
City Bar Justice Center  
Email: rmorfi@nycbar.org

## Debts

Credit Cards Updated  
Your Credit Cards has been updated. You can edit this at any time by clicking the Debts icon above.

Question 1 of 24 in Debts

Do you or your spouse have or are you or your spouse authorized to use any credit cards that have not already been listed?  
Including store cards and gas cards.

Yes No

Card Type	Credit Card
Owner	Self
Creditor Name	citibank
Address	Address
City, ST ZIP	Address, NY 10002
Account Number	XXXXXXXXXXXXXXXXXXXX1515
Amount Owed	3500.00
Disputed	No
Cosigned with someone other than spouse	No

Collection Agencies

Name	Midland Funding
Address 1	
Address 2	
City	
State	
ZIP	
Account Number	
Phone Number	

Mark This

### Finishing the Questionnaire

- Once you have completed the questionnaire, you will be directed to a summary page. The summary screen provides a quick overview of the information you entered.
- You can go back to each category, fix any errors, make edits, or delete incorrect information.

**MyCaseInfo®**

Personal Information | Income | Property | Debt | Liens | Miscellaneous | Documents | Send to Attorney

**Submit your Questionnaire**

**You are almost done...**  
 Once you have answered all of the questions and entered all of your information, please scroll down and review all the information you have entered. If all the information is correct then agree to the terms and submit the questionnaire to your attorney.  
**YOUR QUESTIONNAIRE IS NOT COMPLETE UNTIL YOU REVIEW THE INFORMATION BELOW AND CLICK 'SEND TO ATTORNEY' AT THE BOTTOM OF THIS PAGE.**

**The following items require your attention:**  
 You can use the jump buttons below to edit each record that needs attention or [Show Only Questions Needing Attention](#)

**You have 1 Incomplete Record(s)**  
 You have records which need to be completed before you submit your questionnaire!

1: Employment Income Record Incomplete  
[Go to Incomplete Record](#)

**Contact Attorney**  
 Lawrence Doe  
 Best Case Bankruptcy  
 500 Davis St  
 Suite 100  
 Chicago, IL 60610  
 Phone: 800-492-0077  
 Fax: 647-123-4567  
 Email: [info@bestcase.com](mailto:info@bestcase.com)  
 Web: <http://www.bestcase.com>

- Do not submit to “Send to Attorney” until CBP has reviewed the questionnaire and approved it for submission.
- Flag CBP for review. Once reviewed and approved, CBP will respond advising you to submit the questionnaire.
- Check the I(We) the debtor’s agree checkbox.
- Volunteer(s) should type their names in the “Comments” box so that CBP knows who completed the questionnaire.
- Hit submit button to send it to your attorney.