

Chapter 13 Trustee Office of Gretchen D. Holland

Instructions for File Upload Portal

The Chapter 13 Trustee's Office provides a secure online portal for uploading documents to our office. The portal allows our office to receive and review case documents in a more efficient manner. The portal also provides a mechanism to allow senders to review pending and received documents.

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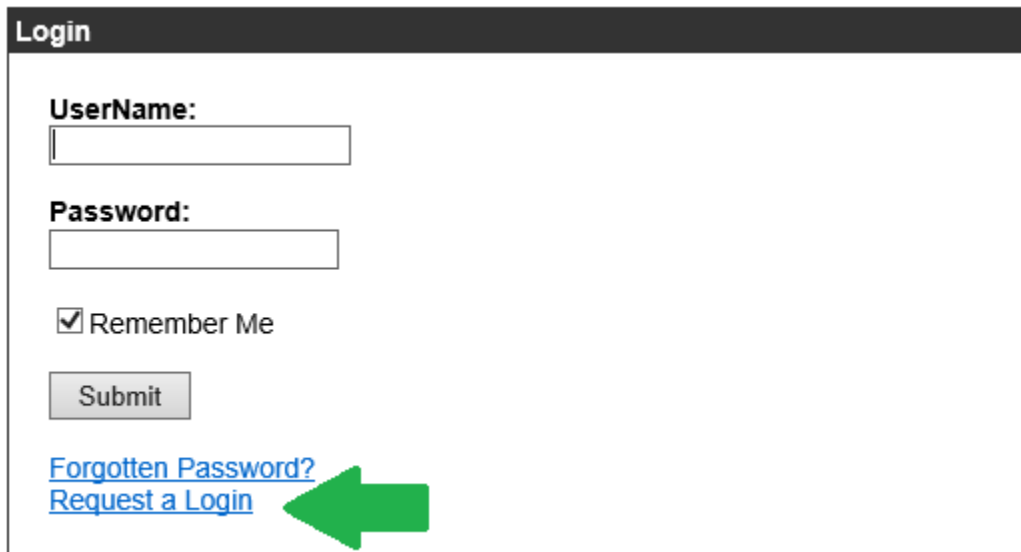
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Address

The online portal is located at <https://upload.upstate13.com:4343/>. Open the browser and enter this URL into the address bar of the browser. This will bring up the login page. From this page you can log in, reset your password, and register for a new login.

Registration

To request a new login, click the “Request a Login” hyperlink on the login page.



The screenshot shows a login form titled "Login". It contains the following elements:

- UserName:** A text input field.
- Password:** A text input field.
- Remember Me
- Submit
- [Forgotten Password?](#)
- [Request a Login](#) (indicated by a green arrow pointing left)

You will be directed to the registration page. On this page, you must enter your first name, last name, telephone (with area code), email address, and password.

The email address you enter here will be the User Name you use in future to log in.

When selecting a password, it must meet the following complexity requirements:

- 1) longer than 8 characters
- 2) shorter than 20 characters
- 3) contain at least 1 letter
- 4) contain at least 1 number
- 5) contain at least 1 CAPITAL letter

Once the form below has been completed, you must enter the validation text before clicking **Submit**.

Registration

Please enter the following registration information. Once you complete the online registration, you will be notified once your user account has been activated.

* Denotes required fields.

***First Name:**

Middle Initial:

***Last Name:**

Company Name:

***Telephone**

***Email Address:**


Your chosen password must meet the following complexity rules:

- Must be longer than 8 characters
- Must be shorter than 20 characters
- Must contain at least 1 letter
- Must contain at least 1 number
- Must contain at least 1 CAPITAL letter

***Password**

***Re-enter Password**

To maintain security, please enter the validation text below.



[\[Different Image \]](#)

Once a successful registration has been submitted, you will be directed to the message shown below. The Trustee’s office will be notified of your pending registration. As soon as your login has been verified and approved by the Trustee’s office, you will receive an email notification from our office that you are now able to use your email address and new password to log in.



Login

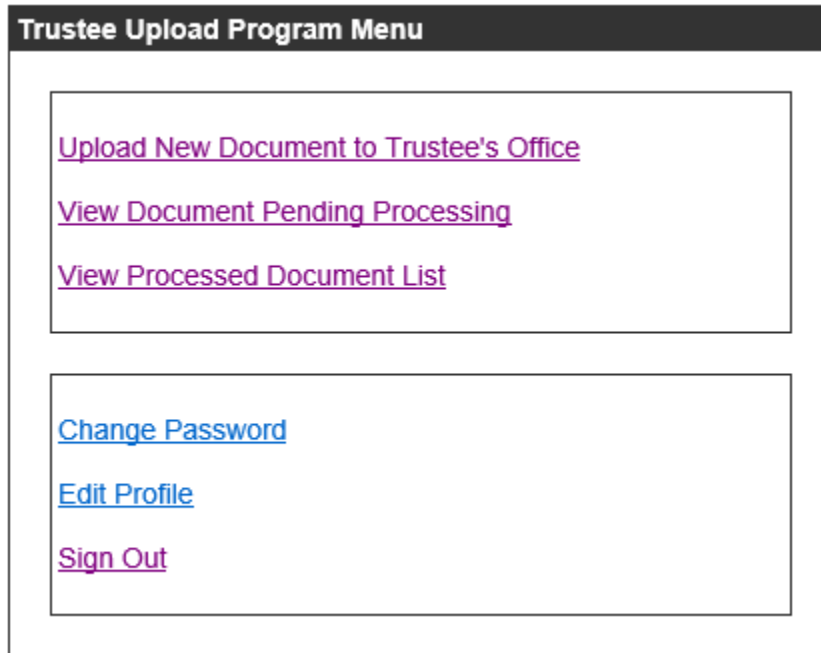
The login page is located at <https://upload.upstate13.com:4343/>. From the login page, enter the email address and password that you selected during registration. Then click **SUBMIT**.

A screenshot of a login form titled 'Login'. It contains the following elements:

- UserName:** A text input field containing 'testuser@test.com'.
- Password:** A password input field with ten black dots.
- Remember Me
- Submit
- [Forgotten Password?](#)
- [Request a Login](#)

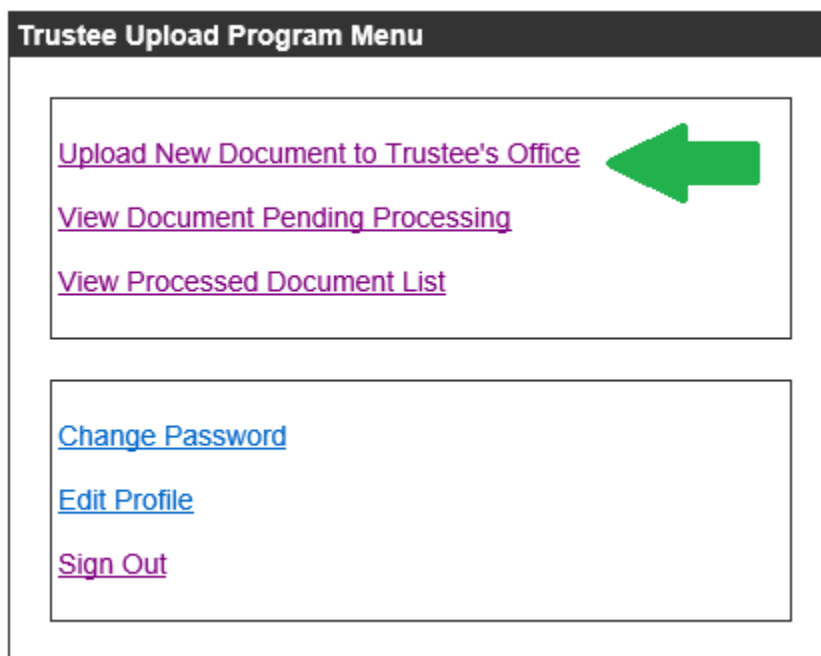
Menu

After you log into the portal, you will be presented with the menu page. From this page, you can access the document upload page, view pending documents, view received documents, change your password, edit your user profile, and sign out of the portal.



Upload New Document to the Trustee's office

From the menu page, the first option is to upload a new document to the Trustee's Office. When you click this hyperlink, you will be directed to the upload page.



From this page, you can select files to upload and provide important messages and comments for the Trustee's staff.

Files that are uploaded from the portal must meet the following requirements:

1. Must be PDF files.
2. Each PDF file must include only one document. *For example, each of the items below must be uploaded as separate documents:*
 - a. *the Attorney Checklist*
 - b. *the real estate tax appraisal for a single parcel of property*
 - c. *the pay advices from a single job*
 - d. *the tax returns for a single year*
 - e. *the completed business questionnaire*
3. All personally identifiable information must be redacted.
4. All pages must be facing the same direction.
5. Two-sided documents must have both the front and the back scanned separately so that all pages are included.
6. Case number must be correct.
7. Document must be clearly named to identify what it is (*e.g.*, "2017 fed and state tax returns for NFS" or "tax app for 123 Main St" or "Feb. 2018 paystubs from BMW")

Please double-check all information for accuracy and completeness before uploading.

First, enter the case number associated with the document to be uploaded. Only enter the numeric characters – no dashes or spaces or letters. Then click **Browse** to select the file from your computer that you want to upload. You also have the opportunity to enter an optional comment for the Trustee's staff. Once all items have been completed, click **Submit**.

Upload a new file...

Files that are uploaded from the portal must meet the following requirements:

- Must be PDF files.
- Each PDF file must include only one document. For example, each of the items below must be uploaded as separate documents:
 - the Attorney Checklist
 - the tax appraisal
 - the pay advices
 - the tax returns for a single year
- All personally identifiable information **MUST** be redacted.
- All pages must be facing the same direction.
- Two-sided documents must have both the front and the back scanned separately so that all pages are included.
- Case number must be correct.

Case Number:
 Enter only the numeric characters of the case number, with no dashes, spaces, or letters.
 For example, case 17-34567-hb should be entered as 1734567.

Filename:

Comment for Trustee Staff:

File ▾
Edit ▾
Insert ▾
View ▾
Format ▾
Table ▾
Tools ▾

A ▾
 A ▾
 ABC ▾

p
Words: 0

The page will then show the status of the current upload task...

Upload a new file...

Uploading, please wait...

Files that are uploaded from the portal must me

- Must be PDF files.
- Each PDF file must include only one docume

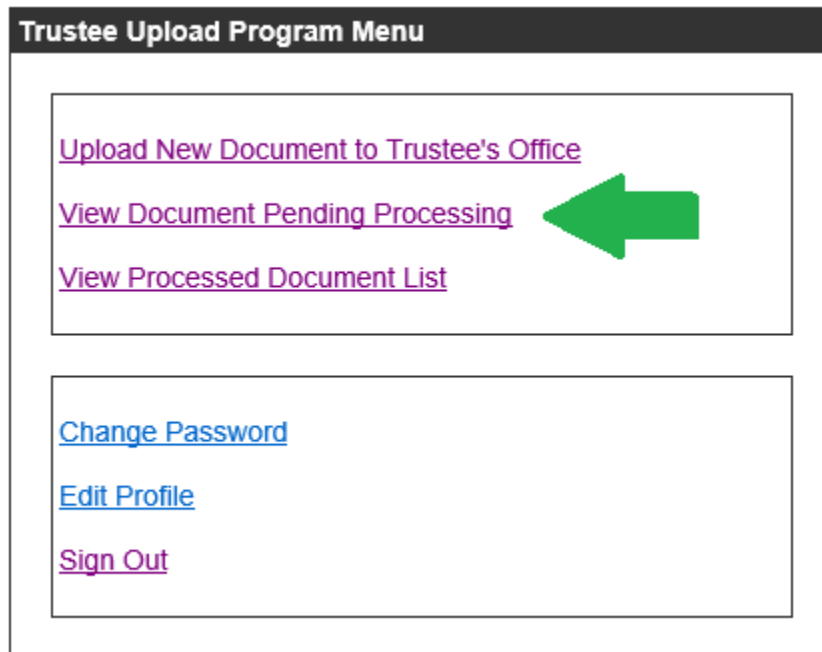
...and will notify you once the upload is complete.



After you finish uploading files, click the <<**BACK** button at the top of the page to return to the menu page.

View Pending Documents

From the menu page, click the **View Pending Documents** hyperlink to view your uploaded documents. Documents listed on this page have not yet been reviewed by the Trustee’s staff. Until documents have been reviewed, you have the ability to delete them. However, once documents are deleted, the Trustee’s staff will not be able to retrieve or review the deleted submission.



This screen shows you the documents you have uploaded, the date and time you uploaded it, the name and size of the PDF, the case number it will be attached to, and the comment you included with your document. You still have the ability to delete it from this page, and if you delete it, there will be no record of it ever having been submitted.

Pending Documents

[<<BACK](#)

Below are documents pending processing by the Trustee office.

	Case Number	File Name	File Size	Date	Comment
Delete	1066666	approved nonstandard conduit mortgage language for use after 12-1-17.pdf	556kB	04/24/2018 10:23 am	Type your comment here. This is for basic info related to the document you are uploading. If you need to send concerns or questions to either Gretchen or Christine, please do NOT use this as the vehicle to do so. Instead, email them directly.

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View Processed Documents

From the menu page, clicking the **View Processed Documents** hyperlink allows you to see the list of documents that have already been received by the Trustee’s staff.

Trustee Upload Program Menu

[Upload New Document to Trustee's Office](#)

[View Document Pending Processing](#)

[View Processed Document List](#) 

[Change Password](#)

[Edit Profile](#)

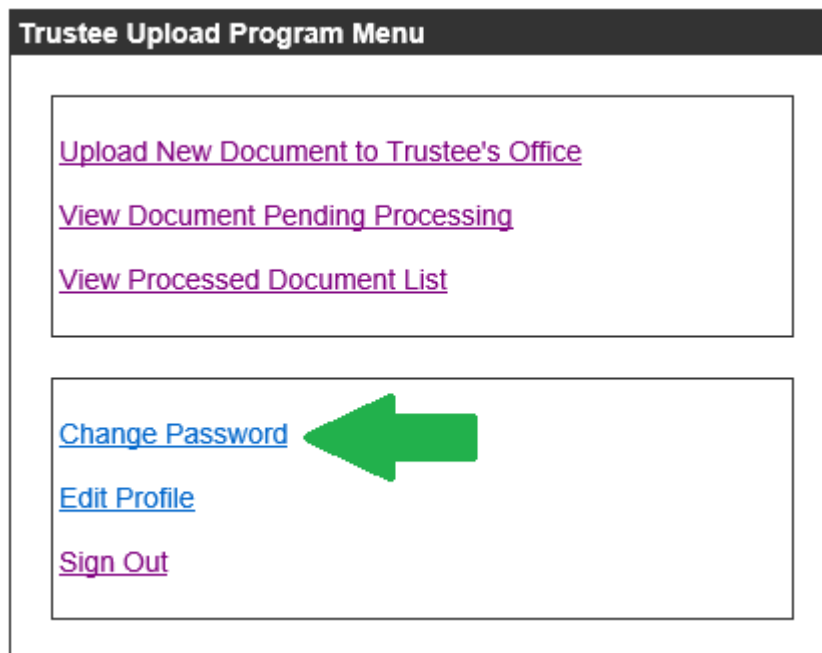
[Sign Out](#)

This screen shows you the same information as before, but the ability to delete the uploaded document is gone. Once an uploaded document appears on this screen, it means that someone in the Trustee’s office has opened it and forwarded it to the appropriate person for review. **However, it does *not* necessarily mean that the Trustee or the Staff Attorney has had the opportunity to review it.**

Processed Documents				
<<BACK				
Below are documents that have been processed by the Trustee office.				
Next>> Last>>				
Case Number	File Name	File Size	Date	Comment
1800440	2017 Tax Returns_Redacted.PDF	334.82kB	02/02/2018 09:52 am	
1800440	2016 Tax Returns_Redacted.pdf	6.93MB	02/01/2018 11:55 am	

Change Password

From the menu page, click the **Change Password** hyperlink to change your password.

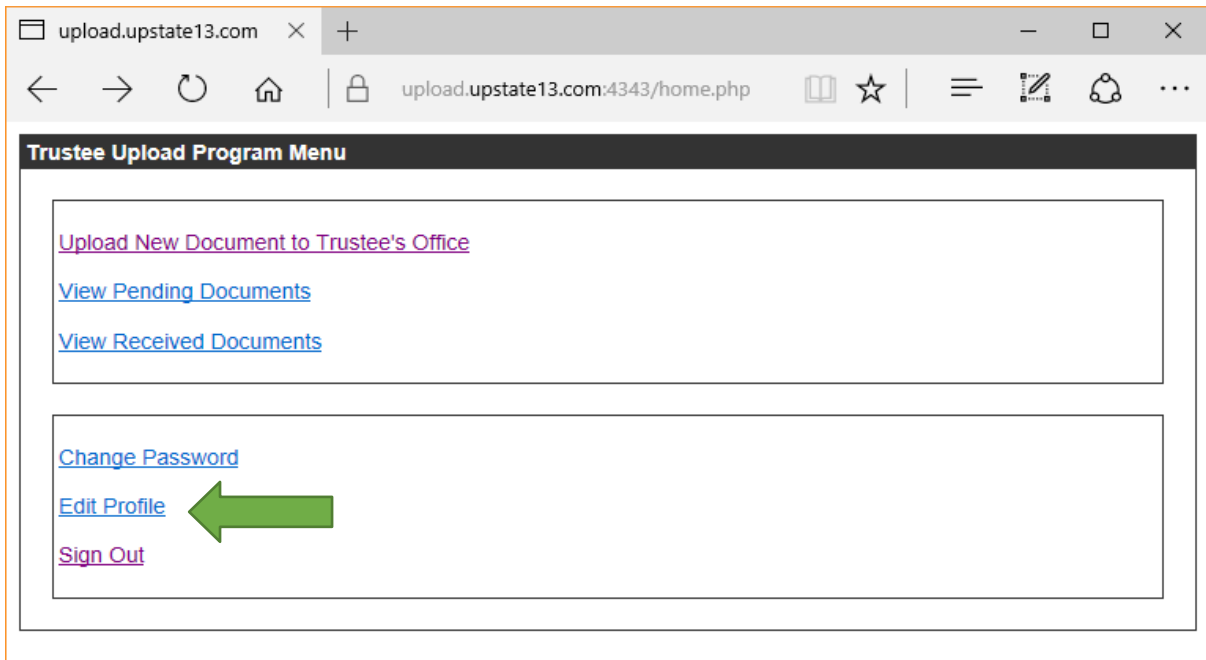


You will be taken to a page to enter a new password. This password must meet the same complexity rules that were required during registration (see p. 3 for instructions).

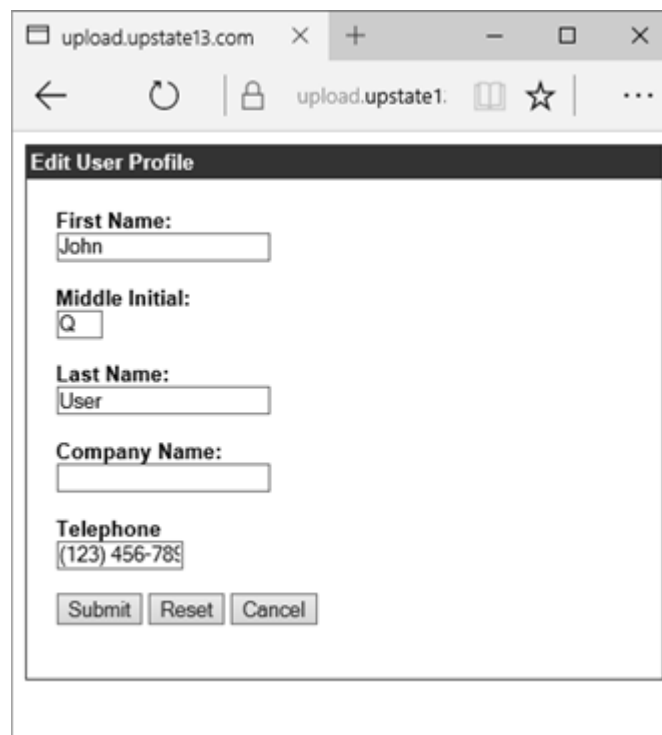
If you click **Submit** the password change will be attempted. If you wish to cancel the change, click **Cancel**. If there are any problems with your new password, you will receive an error message informing you of the issue. Correct this problem and submit the form again.

Edit User Profile

From the menu page, you have the option to edit your user profile by clicking the **Edit Profile** hyperlink.



If you click this hyperlink, you will be taken to the profile editing page. From here, you can change your first name, middle initial, last name, company name, and phone number. Click **Submit** to save the changes or **Cancel** to leave the page.

A screenshot of the 'Edit User Profile' form in a web browser. The form contains the following fields and buttons:

- First Name:**
- Middle Initial:**
- Last Name:**
- Company Name:**
- Telephone:**
- Buttons:

Sign Out of the Portal

From the menu page, there is a hyperlink **Sign Out** which will allow you to log out of the upload portal. Once you sign out, you will have to log in again to access the portal menus.

