

Reference Guide

Credit Counseling and Financial Management - The Creditor Counseling Certificate and Financial Management B23 form are docketed by separate events. At the initial filing, the Credit Counseling Certificate is required to be docketed separately from the petition. Filers should not use the Official Form B23 when filing the Credit Counseling Certificate. Before the discharge is entered or final plan payment is made, the Financial Management Form B23 must be filed.

CREDIT COUNSELING	
Step	Action
1	Click on Bankruptcy > Other . Enter the case number - Next .
2	Verify case number and debtor name(s) - Next .
3	Select Certificate of Credit Counseling - Next .
4	Click Browse on Select the PDF Document screen to locate and verify the document you wish to attach to this entry. Click Open to attach the correct PDF - Next .
5	At the Joint Filing with other Attorney(s) screen - click Next .
6	At Select the Party screen select the desired party. If the certificates are filed in a joint case, please remember to pick the appropriate party filer - Next .
7	Verify Docket Text and Modify as Appropriate - continue docketing - The Notice of Electronic Filing screen appears and your transaction is complete.
FINANCIAL MANAGEMENT	
Step	Action
1	Click on Bankruptcy > Other . Enter the case number - Next .
2	Verify case number and debtor name(s) - Next .
3	Select Financial Management Course - Next .
4	Click Browse on Select the PDF Document screen to locate and verify the document you wish to attach to this entry. Click Open to attach the correct PDF - Next .

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5	Bypass the Joint Filing with other Attorney(s) screen - Next .
6	At Select the Party screen select the desired party. If the certificates are filed in a joint case, please remember to pick the appropriate party filer - Next .
7	Verify Docket Text and Modify as Appropriate - continue docketing - The Notice of Electronic Filing screen appears and your transaction is complete.