

## Trustee Collaborative

TrusteSolutions' Trustee Collaborative is designed to provide a simple mechanism to upload 341 meeting documents to directly into a trustee document management system.

The trustee who has been assigned to a bankruptcy case will create a checklist of required documents. When a case is assigned to a trustee and imported into their system, the debtor attorney who filed the case will receive a notification to register for a website login (shown below). By clicking the "Register" hyperlink, the attorney will sign up for an account through which documents can be uploaded and tracked. This document will explain the process to use this system.

### Step 1 – Invitation to Register

When a case is assigned to a trustee, the debtor attorney will receive a registration email from Trustee Collaborative. The email that the invitation is sent to will be the email associated with the PACER login of the attorney filing the case. **It is very important when registering that you use the same email address that you use to file your cases with.**

When the email is received, click "Register" to create an account.

[« Back to Inbox](#) [Archive](#) [Report spam](#) [Delete](#) [Move to ▼](#) [Labels ▼](#) [More actions ▼](#)

### Welcome to TrusteeCollaborative! Inbox | X

☆ [no-reply@trustesolutions.com](mailto:no-reply@trustesolutions.com) to me

Attn: Bankruptcy Professional Please accept my invitation to share documents easily using TES Collaborative.

Please use the following link to register an account with us: [Register](#)

- TrusteeCollaborative Team

## Step 2 – Registration Process

The following form is used to sign up for the TrusteCollaborative service. It is important to remember the user name and password you use to register. The website to access is <https://collaborate.trustesolutions.com>. After registering, you will be redirected to the login page and can start using Trustee Collaborative immediately.



### Signup

User Name

Password

Confirm Password

E-mail

Security Question

Security Answer

Name

Address

Voice

Fax

Description

I accept the [Terms of Use](#)

Create User

## Step 3 – Using Collaborative

The first time you log in after registering, you should be able to see a link to the trustee whose invitation was sent to you. If you had already registered, you would be able to see other trustees who are using TrusteCollaborative.



Home



Create a new Workspace



Attorney Documents  
cases

Select a bankruptcy trustee to access case documents



Share Manager (Chapter 7)  
Chapter 7 Bankruptcy Cases



Best Trustee (Chapter 7)  
Chapter 7 Bankruptcy Cases



Best Trustee  
Best Trustee

Click the trustee name who is administering the case you are trying to locate. You will see a list of cases that have been filed by you and have been assigned to the trustee. Click on the hyperlink with the case name and number to access the document checklist.



Home



Best Trustee

Select a folder to access documents.

Name	Description	Debtor Type	341 Meeting ▲	Count
 10-98765	DELLMAN, MICHAEL	Individual	01/03/2011 08:30AM	3 documents
 09-50688-BJ	EVANS, KENDRA	Individual	04/01/2011 11:30AM	4 documents
 11-31234	TROY, RUBLE	Individual	05/31/2011 09:30AM	0 documents
 11-01698	LOMBARDO, MARK AND LOMBARDO, ELLIE	Individual	06/10/2011 11:00AM	0 documents

You will see the document check list that has been set up by the trustee. For each entry, you will have an option to upload a document. The red asterisk indicates if the document is required.

TRUST  eCOLLABORATIVE Settings | Logout

 Home ▶  Best Trustee ▶  10-98765 - DELLMAN, MICHAEL

 Upload Documents

**Debtor Checklist for 341 Meeting on 01/03/2011 08:30AM**

\* Sixty days of payment advices for the period immediately prior to the bankruptcy (must be produced no later than 10 days prior to the scheduled meeting)  [Upload Document](#)

 testing.docx	testing file for dellman case	03-May-2011 10:57AM	
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Tax Returns  [Upload Document](#)

 Click Upload Document to upload a document for this checklist item.

341 docs  [Upload Document](#)

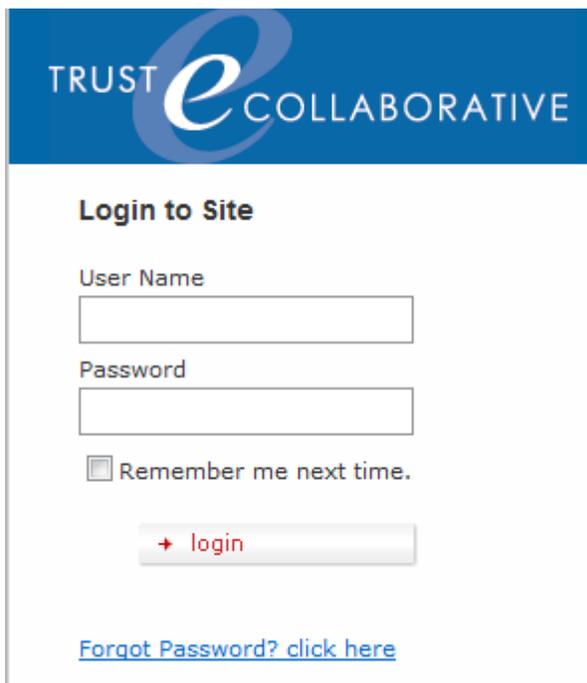
 Click Upload Document to upload a document for this checklist item.

The trustee will be able to access the documents you uploaded within their document management system. You will be able to access the documents you submit for future reference.

## FAQ

### Forgotten Password

If you forget your password, go to the login page and click the hyperlink “Forgot Password?”. This will navigate you to a screen to input your username. A temporary password will be issued to you via the email account with which you registered. Be sure to change this temporary password upon successful login. To change your password, go to Settings in upper right corner of Trustee Collaborative.



**TRUST e COLLABORATIVE**

**Login to Site**

User Name

Password

Remember me next time.

[+ login](#)

[Forgot Password? click here](#)

### TrusteeCollaborative Password Change Notice 📧 | X Inbox | X

☆ [no-reply@trusteesolutions.com](mailto:no-reply@trusteesolutions.com) to me

Your password has been changed to 7lvRd7BO+|KNLO

Click the link to login with your new password: [Collaborate](#)

**For security reasons, please change your password after you login.**

- TrusteeCollaborative Team

## Notifications

Trustee Collaborative can be set up so that a different email address can be notified when a document request is incomplete or when a deadline for a 341 meeting is approaching. Go to Settings in the upper right corner then provide the Notification Email address you wish to use.

### Edit Contact Information

Name	<input type="text" value="Bankruptcy Attorney"/>
Address	<input type="text" value="1770 st james"/>
Voice	<input type="text" value="7135520100"/>
Fax	<input type="text" value="7135520011"/>
Email	<input type="text" value="a_lott@gmail.com"/>
Notification Email	<input type="text" value="support@trustesolutions.com"/>

## Uploading Documents

There are two ways to upload documents into Trustee Collaborative. The first is to select the “Upload Documents” hyperlink beside each checklist item. The second is to use the “Upload Documents” feature in the upper left corner. This feature allows you to upload batches of documents at one time.

The second method is accessed in the following way. You can also drag/drop multiple files into this window for upload.

 [Home](#) ▶  [Best Trustee](#) ▶  [11-01691](#)

### [Upload Documents](#)

This tool allows you to add multiple documents to a queue and then upload those documents with a single click.

\* Drag and drop of documents is enabled on the latest version of Google Chrome, Mozilla Firefox and Apple Safari.

For best experience on Internet Explorer (including IE9) please install either Adobe Flash or Microsoft Silverlight.