Document Delivery Quick Start Guide
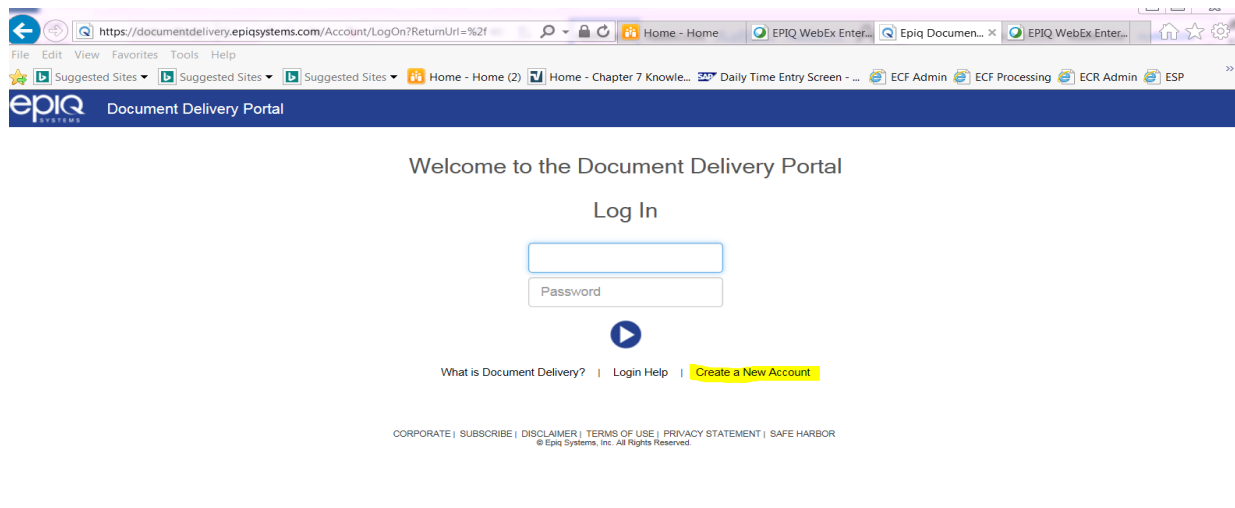
Document Delivery Upload Process For Debtor Attorneys

A. To begin using Document Delivery as a Debtor Attorney (submitter) you must first set up your account from the Document Delivery Website. You would typically be invited to use the program by way of an email provided by Epiq on behalf of the Trustee (recipient) to use the system. That email would provide instructions needed to set up the account but you can set your account up proactively by completing the following steps.

Epiq recommends that the debtor attorney account be set up under the name of the debtor attorney. Someone else may be responsible for implementing the program but the primary account should be set up under his or her name (debtor attorney). You may use another email other than the debtor attorneys email address when setting up the account.

B. You can access the site using the following URL. DocumentDelivery.epiqsystems.com

Once you access the Document Delivery Portal you would select the option Create a New Account as shown below. At this point you would not be able to log in to Document Delivery until the account is created.

This selection will bring you to a "New User Registration" Form where you will be required to fill out many fields. Each field must be filled entirely to be able to advance to the next screen. Once all fields have been filled in and you have accepted the "End User License Agreement", select "Register." An example is displayed below of the Registration Screen.

After you successfully create the account you will receive an email asking you to confirm the account and activate it with Epiq. You MUST activate the account from that email which comes from documentdelivery.epiqsystems.com   When the account is activated you can log in to the account using the Username and Password you provided when setting up the account. Following activation, you can begin to use Document Delivery Portal.

C. As mentioned previously, to send documents to a Trustee using Document Delivery you must first receive an invitation from the Trustee. This may require placing a call to the Trustee. The Trustee must use Epiq Software and have a valid Document Delivery account that has been activated by Epiq. You will not need to share this with the Trustee but you must simply ask the office to send a Document Delivery invitation if you do not have one.

Once you receive the invitation from the Trustee and accept the invitation by selecting the hyperlink which contains the activation code from the Trustee office generated by Epiq you will then be able to upload documents to the Trustee. Example of the Invitation is shown below.

You have been invited to utilize Epiq Document Delivery by Trustee.

Document Delivery provides a secure and easy method to deliver documents to Fiduciaries using Epiq products. Once you have completed the registration process, you will be able to access the Website and upload documents.

If you are already a registered user, simply click the link to complete the authorization process. If this is your first time using the system, you will first need to complete a simple registration page to create your account.

Click the link below to accept the invitation from Trustee:
https://documentdelivery.epiqsystems.com/Account/ConfirmAuthorization/T7TyK34JGU (the invitation link can only be used one time and Expires within 30 days)

Please note: You can only click on the link once to accept this invitation. After clicking once, the link becomes inactive. For future document submissions you must access the Document Delivery website directly at https://documentdelivery.epiqsystems.com.

Please do not access the website via the links included on the emails that were sent during the registration process.

D. **Uploading Documents to the Trustee**

➕ To upload documents, the user can select the upload icon available in the upper right corner of the Document Delivery Website screen shown above. The icon is represented by a circle with and up arrow in its center. The process to upload documents consists of two screen.

➕ On the first upload screen you will select the trustee you will want to send documents to and enter the case number.

➕ You must enter a valid case number and format for the case or the documents **will not** upload to the correct case for the trustee. The format will be "xx-xxxxx".

➕ To upload documents you can either:

➕ Drag and drop a PDF file, (under 20 MB, per PDF document file also the filename cannot exceed 30 characters and may have to be renamed) into the window or…

➕ Double click in the window (as shown below C.), and use your cursor to navigate and select the folder within the window to browse to the location where your files are located.

➕ Once you have selected the files by clicking on them and selecting the OPEN option or have dragged your files into the rectangular box, select "Next." This will allow you to move to the second and final upload screen.

➕ It will here that you will be required to add a "Doc Category Name" to the file(s) uploaded to the document delivery system. Select the appropriate category name for each document based on its file or filename type and any notes you feel necessary. Notes are option, Document Category names are NOT. When complete select the option "Finish."

➕ You will receive a message that your documents have been uploaded successfully if all requirements for the documents have been satisfied. This includes the File Size (under 20mb), File Name length (Under 30 characters) and the Document Category Name has been applied to each document your are sending.

E. Example of the Upload Screen after the Upload icon has been selected.
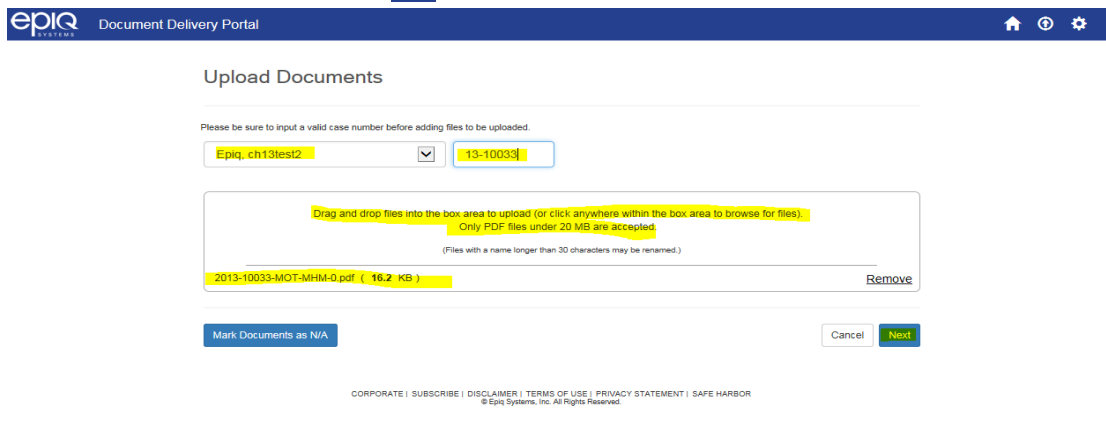
Once files have been selected they will populate showing the names and files sizes **if** they meet the document requirements highlighted above. Trustee Name and Case number are also required. IF all of the requirements are fulfilled the open NEXT is available which takes you to second and final Screen as indicated below.

On this final screen you MUST select a Document Category name for each document being submitted and then you can select Finish. Notes you might add will be optional. This would allow you to complete the upload process and your completed process would be indicated by a notification that would let the User know your documents have been successfully uploaded. This can be confirmed by selecting the HOUSE icon shown on the example above and from that location there will be a tab named Document History which will show you the most recent documents uploaded and their statuses.

For Additional support please refer to System Help located under gear icon at the right hand corner of the Document Delivery Portal Banner or you may Epiq at 888-374-2713 and we will be happy to assist you. You may also email us at contactepiq@epiqsystems.com