



CaseLink²

California Chapter 7 Practice Discovers Huge Benefit of Web-Based Flexibility, Increases Productivity Tenfold with CaseLink²

From *CaseLink Office* to *CaseLink Web* to *CaseLink²*, Trustee Sandra McBeth and her assistant, Donna Earnest have increased their productivity 100%.

Breaking Out of the Inertia, Discovering the Cloud

Trustee Sandra McBeth and her assistant, Donna Earnest, were happy users of the *CaseLink Office* software by BMS. They had used the software in their Central California-based Chapter 7 Practice since Ms. McBeth had gone on panel in 1997, and they were comfortable with the platform. However, when Ms. Earnest began to hear about web-based software and discovered that BMS had a cloud-based software, *CaseLink Web*, she was interested to try it out.

Shortly after switching to *CaseLink Web*, Ms. Earnest discovered that having the ability to work from anywhere on the web was a huge benefit to both her and Ms. McBeth. "The platform made it so much easier for us to access our data whenever we needed it," Ms. Earnest said. "We didn't think it would be such a big thing when we started, but we found it to be very handy to be able to access our caseload outside of the office. Now, that is a necessity for us."

"We found it to be very handy to be able to access our caseload outside of the office, such as during a hearing or on the way to a conference. Now, that is a necessity for us."

Due to their great experience on the web, in September 2016 Ms. Earnest and Ms. McBeth were very willing to try out the newest iteration of the web-based software platform from BMS – *CaseLink²*. Since they made that switch, they have not looked back.

"The accessibility and ease of use is what I love the most about CaseLink². I can pull up my caseload whenever I need to, and I don't have to be in the office as much. I'm very comfortable using CaseLink² outside of the office, so that is a great asset."

Productivity Increased by Leaps and Bounds

Since switching to *CaseLink²*, Ms. Earnest says her productivity has increased 100%. "So many of our processes have been streamlined," Ms. Earnest says. "The organization of the platform is great – I can easily find my documents whenever I need them, and I can easily manipulate my screens to be how I want them."

CaseLink² was designed to be similar to *CaseLink Office*, which Ms. Earnest is very appreciative of. "We were very comfortable with *CaseLink Office*, so we love that the platforms are similar," Ms. Earnest said. "It is also just a very user-friendly software. It's great."

In *CaseLink²*, the accessibility that Ms. Earnest and Ms. McBeth

CaseLink² Cases 341(a) Banking Email Tools Documents Calendar Court Resources BMS

Home | 12-13294 CANDY C. AGUNDEZ | Asset Case | ★

Case Information

Case 12-13294 Judge MM7
 Type Asset Trustee 001330
 Debtor CANDY C. AGUNDEZ DSO
 SSN/TIN 623-09-1820
 Co-Debtor DSO
 SSN/TIN
 Debtor Atty DAVID G. WEIL

Opened 09/29/2012 Petition
 1st 341(a) 10/26/2012 09:00 AM Continued
 341(a) Con 12/13/2012 02:30 PM
 IDE 10/26/2012 09:00 AM
 ETFR 04/30/2015
 TFR
 TDR
 Closed

Chapter Ch. 7 Prior Chapter None
 Division BMS1 (1) Case Set Chapte
 Bond Type Blanket Exp
 Bond Limit \$0.00

Tags UST REFERRAL

Summary

Debtor
 AGUNDEZ, CANDY C.
 2024 GRANITE HILLS DRIVE
 EL CAJON, CA 92019
 SSN: 623-09-1820
 Estate TIN: 30-6351013

Dates

Global System Dates		Global Custom Dates	
First 341(a)	10/26/12		D/L Obj to Disc
Contd. 341(a)	12/13/12		
Opened (Petition date or date converted)	09/29/12(f)		
Initial Debtor Exam (IDE)	10/26/12		
Appointment	09/29/12		
Claims Bar	03/11/13		
Government Claims Bar	03/28/13		
Discharged	12/27/12		
Original ETFR	02/14/14		
Current ETFR	04/30/15		
W-9 Signed Sent	02/19/13		

+ Documents via DocLink
 - Memos, Journal, etc.
 341(a) Memo

loved about *CaseLink Web* is even more enhanced, with improved speed and the flexibility to easily use their case data from wherever they are. "The accessibility and ease of use is what I love the most about *CaseLink²*," Ms. Earnest said. "I can pull up my caseload whenever I need to, and I don't have to be in the office as much. I'm very comfortable using *CaseLink²* outside of the office, so that is a great asset."

BMS Bankruptcy Knowledge Provides 360-Degree Support System

Ms. McBeth and Ms. Earnest could not be happier with the support that they receive from BMS. In addition to sterling software support, "My Account Manager, Kathy Pscion, is also able to provide bankruptcy expertise tailored to my district because she had previously worked as a Trustee Assistant herself within the same district."

"Kathy came on as our Account Manager in January 2016, and she has just been so helpful. She had worked with our UST so she understands our UST's demands, and that is fantastic," Ms. Earnest says. "Plus, Rosie in the BMS Support Center has been a great help, since she understands not only the software but also bankruptcy, and has helped us handle some of our complex case scenarios. I don't know what we would have done without BMS support!"

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