

Disclosure Statement – Adding Parent Companies and Affiliates

During the process of filing a Disclosure Statement, attorneys will now be required to enter each individual parent company and/or affiliate into the CM/ECF system in accordance with A.P. 7.5.

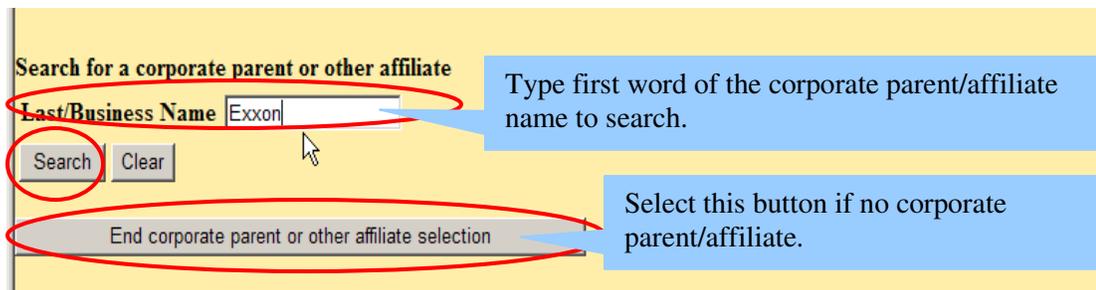
- (1) Using the **Other Documents/Disclosure Statement** event, you will ultimately see the screen shown in Figure 1.



The screenshot shows a yellow background with two text input fields. The first field is labeled "Type in *no* if no parent companies:" and the second is labeled "Type in *no* if no mergers OR *a* if a merger exists:". Below the fields are two buttons: "Next" and "Clear".

Figure 1: Enter information if applicable.

- (2) If there are parent companies to the party corporation, partnership or limited liability company, leave the top line blank, answer the merger question appropriately, and click **[Next]**. (Figure 1). If there are no corporate parents, enter "no" in the top line, answer the merger question appropriately, and click **[Next]**.
- (3) The next screen contains a message that reads: "Add Corporate Parents and/or Corporate Affiliate(s) on next screen, if any." Click **[Next]** and the screen shown in Figure 2 will appear.



The screenshot shows a yellow background with a search form. The title is "Search for a corporate parent or other affiliate". There is a text input field labeled "Last/Business Name" with "Exxon" entered. Below the field are "Search" and "Clear" buttons. At the bottom is a button labeled "End corporate parent or other affiliate selection". Blue callout boxes provide instructions: "Type first word of the corporate parent/affiliate name to search." points to the input field, and "Select this button if no corporate parent/affiliate." points to the "End corporate parent or other affiliate selection" button. Red circles highlight the "Search" button and the "End corporate parent or other affiliate selection" button.

Figure 2: Search for corporate parent/affiliate.

- (4) If there are no corporate parents/affiliates, select **[End corporate parent or other affiliate selection]**. (See Figure 2). If there are corporate parents/affiliates, type the first word of the name of the corporate parent/affiliate in the "Last/Business Name" field and click **[Search]** as shown in Figure 2. The search will produce a list of companies for you to choose from. (See Figure 3).

- (5) Scroll through search results. If a name on the list matches exactly the name of the corporate parent, select the applicable name, click **[Select name from list]** and proceed to step number (6) below. If there is no exact match, select **[Create new corporate parent or other affiliate]**, and go to step number (7) below. (See Figure 3).

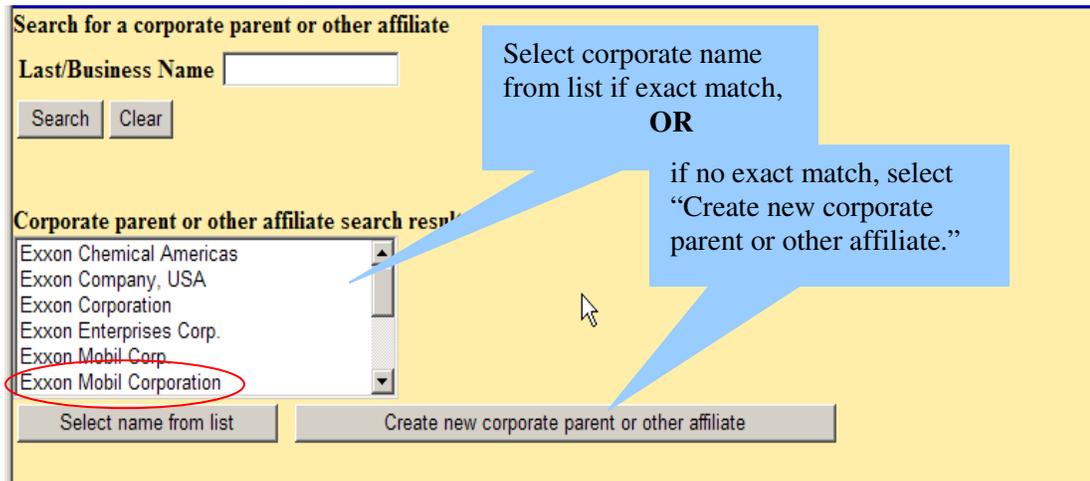


Figure 3: Select/create corporate parent/affiliate.

- (6) If a corporate parent/affiliate was selected from the search results in Figure 3, the corporate parent/affiliate name will appear in the "Last/Business name" field. Select "Corporate Parent" or "Other Affiliate" from the "Type" drop down box and then select **[Add corporate parent or other affiliate]**. (See Figure 4).
- (7) If the corporate parent/affiliate was not selected from the search results in Figure 3, and you selected "Create new corporate parent or other affiliate," enter the entire name of the corporate parent/affiliate in the "Last/Business name" field (see Figure 5). After entering the corporate parent/affiliate, select "Corporate Parent" or "Other Affiliate" from the "Type" drop down box and then select **[Add corporate parent or other affiliate]**.

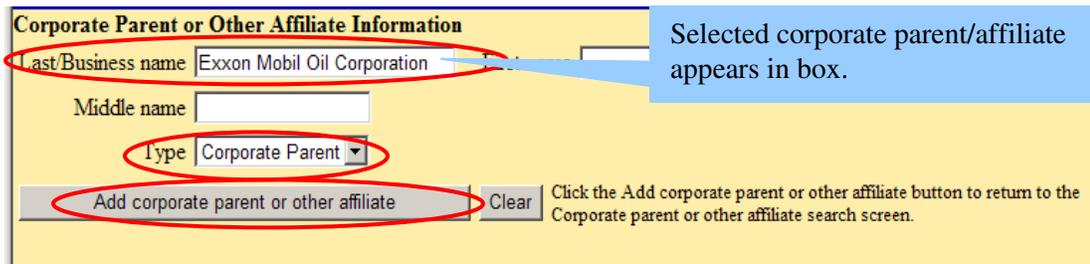


Figure 4: Add corporate parent or affiliate

Corporate Parent or Other Affiliate Information

Last/Business name First

Middle name

Type

Click the Add corporate parent or other affiliate button to return to the Corporate parent or other affiliate search screen.

Figure 5: Add corporate parent or affiliate - not on list

- (8) Select the party or parties you are associating the corporate parent/affiliate to and click **[Next]** (select more than one party by holding the Ctrl key and selecting additional parties). (See Figure 6.)

Adding new corporate parent or other affiliate.

Select the Party:

Figure 6: Select party related to corporate parent/affiliate.

- (9) The corporate parent/affiliate you entered will be listed. Continue this procedure for every corporate parent and/or affiliate included in the Disclosure Statement. When completed entering corporate parent(s) and/or affiliate(s), click **[End corporate parent or other affiliate selection button]**. (See Figure 7.)

Search for a corporate parent or other affiliate

Last/Business Name

Corporate parent/affiliate previously added.

Corporate parents and other affiliates added thus far:
Doe Oil Company Corporate Parent Exxon Mobil Oil Corporation

Figure 7: Corporate parent/affiliate added.

- (10) After entering all the corporate parent/affiliates, the next screen you will see will be the docket text screen where you can enter any additional information in the free text box. Review and select **[Next]**. (See Figure 8.)

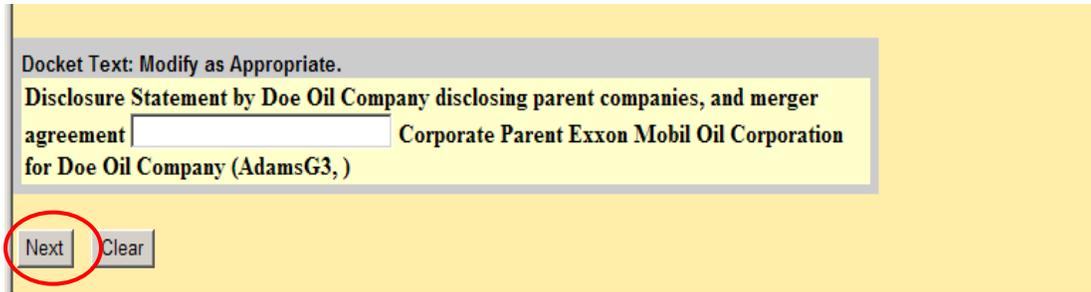


Figure 8: Docket text preview.

- (11) Final docket text screen. By clicking **[Next]**, the disclosure statement will be filed with the court and a Notice of Electronic Filing with the disclosure statement attached will be sent via email to all counsel in the case. (See Figure 9.)

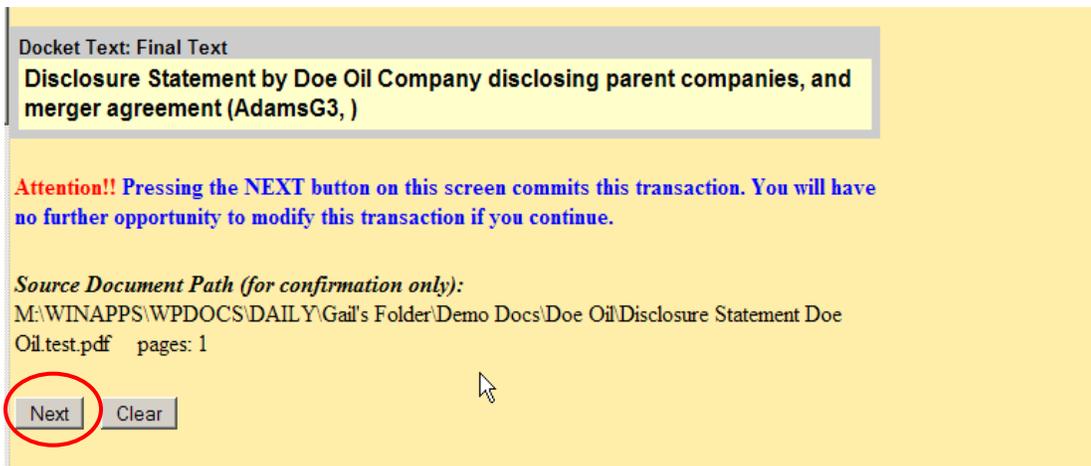


Figure 9: Final docket text screen