

FILING AGENTS FOR ATTORNEYS AND TRUSTEES

Updated 1/31/2023

Description: This process shows the steps required for CM/ECF users to create and update permissions for a filing agent from the attorneys or trustee's account. You will also be able to deactivate as well as reactivate a filing agent's account.

This Participants Guide includes the following sections:

- **Create Filing Agent(s)**
- **Setting Filing Agent(s) Permissions**
- **Remove a Filing Agent**
- **Re-activating a Filing Agent**
- **Filing Agents with Multiple Attorneys**

NOTE: The filing agent user was created to assist attorneys, trustees, and the U.S. Trustee with input into the CM/ECF system. The agent files on behalf of someone else but uses his or her own individual pacer username and password.

Filing agents are not standard user types and their names will not appear on the docket report and may be linked to multiple attorneys or trustees.

If you want a filing agent to receive e-mail at their own e-mail address, the filing agent's e-mail address must be placed in the "Send notices to these additional addresses" section of your attorney or trustee person record.

When a pleading is filed in CM/ECF, the notice of electronic filing, or NEF, and the docket text will show your name as the attorney or trustee. Finally, an attorney or trustee may have multiple filings agents.

STEP 1 – Click on the **Utilities** hyperlink on the CM/ECF Main Menu Bar.

NOTE: The creation or editing of a filing agent record is accomplished in an attorney or trustee's person record. The following steps will allow you to create a filing agent within your CM.ECF account.

STEP 2 – The UTILITIES EVENTS screen displays.

- Select the **Maintain Your ECF Account** hyperlink.
- Select “More user information...” which is where filing agent records are maintained.
- For further information on each of these categories, click the **Help** button located on the main menu bar.

STEP 3 – The MORE USER INFORMATION FOR ATTORNEY screen displays.

- To associate a filing agent with this account, enter the last name of the filing agent in the “Find filing agent” field and then click the search icon to determine if an agent has already been associated with your account.
- The search will generate a window listing all filing agents that matched your search criteria.
- Select the correct filing agent by confirming the correct name and address.
- Click the Select button beside the filing agent to add them to your attorney record.
- To continue saving this filing agent to your attorney record, select “Return to Account screen.”
- Select Submit and the attorney record will be updated.
- The final screen confirms that the linking of the filing agent to the attorney record is complete.

SETTING FILING AGENT PERMISSIONS

STEP 1 – Click on the **Utilities** hyperlink on the CM/ECF Main Menu Bar.

STEP 2 – The UTILITIES EVENTS screen displays.

- Select the **Maintain Your ECF Account** hyperlink.
- Select “More user information...” to edit the newly created filing agent record and to set permissions.
- For further information on each of these categories, click the **Help** button located on the main menu bar.

STEP 3 – The MORE USER INFORMATION FOR ATTORNEY screen displays.

- Notice that the newly created filing agent’s name is now a hyperlink to the filing agent’s record.
- Clicking on the name opens the Filing Agent Information screen.

STEP 4 – The FILING AGENT INFORMATION/PERMISSIONS screen appears.

- Determine if you want the filing agent to have permission to pay fees on your behalf. If so, the filing agent will need access to an authorized credit card number to use with Pay.Gov. If yes, select “Y” from the drop-down box which indicate “yes”. If no, no action needs to be taken. CM/ECF automatically defaults to “N” indicating “no”.

NOTE: This setting can be modified at any time after the filing agent’s account is activated.

- Select the **SAVE** button at the bottom of the permissions screen.
- Select “Return to Account screen” to continue saving this permission setting to the filing agent’s account.
- Select Submit and the filing agent’s record will be updated.
- The final screen confirms the changes made to the permissions settings of the filing agent for this attorney’s record.

REMOVE A FILING AGENT

STEP 1 – Click on the **Utilities** hyperlink on the CM/ECF Main Menu Bar.

STEP 2 – The UTILITIES EVENTS screen displays.

- Select the **Maintain Your ECF Account** hyperlink.
- Select “More user information...”
- For further information on each of these categories, click the **Help** button located on the main menu bar.
- Uncheck the box beside the filing agent you wish to remove. This will deactivate the filing agent’s account associated with the attorney’s record.
- When the changes are saved, the association record between the filing agent and the attorney is deactivated. Although the agent is no longer associated with the filer, he or she can be re-associated easily.
- Select “Return to Account screen.”
- Select the **[Submit]** button.
- This screen confirms the changes made to the settings of the filing agent and the attorney record has been updated.

RE-ACTIVATING A FILING AGENT

STEP 1 – Click on the **Utilities** hyperlink on the CM/ECF Main Menu Bar.

STEP 2 – The UTILITIES EVENTS screen displays.

- Select the **Maintain Your ECF Account** hyperlink.
- Select “More user information...”
- For further information on each of these categories, click the **Help** button located on the main menu bar.
- To re-associate an inactive filing agent, click the “Agents previously removed from this account” hyperlink.
- The “Reactivate a filing agent” window shows any filing agent previously associated with this attorney.
- To reactivate an agent, click the **[Select]** button next to the agent’s name you wish to reactivate.

STEP 3 – The MORE USER INFORMATION FOR ATTORNEY screen displays.

- This screen shows the filing agent is once again an active filing agent for the attorney. **REMEMBER**, these changes must be saved.
- Select the “Return to Account screen.”
- Select the **[Submit]** button.
- When the changes are saved, the association record between the filing agent and the attorney is reactivated.
- This screen confirms the changes made is complete and the attorney record has been updated to reactivate a filing agent.

FILING AGENTS WITH MULTIPLE ATTORNEYS

- If a filing agent has been linked to two or more attorneys, the first screen that appears after the agent logs in through their individual pacer account requires the agent to select the attorney for whom he or she is filing.
- Once the filing agent has logged in, the name of the attorney or trustee displays on every screen for filing agents under the CM/ECF Events Bar.
- Beside the attorney or trustee name is the “Change user icon.” This icon only appears for a filing agent linked to multiple attorneys or trustees and will not appear if the agent is linked to only a single attorney or trustee. When clicked, the icon enables the filing agent to select a

different attorney without logging out of CM/ECF.

- When the Bankruptcy Events link is selected, the events listed are permissions that have been granted to the filing agent. Remember, these permissions come from the groups that the attorney is a member of. If the filing agent selects a different attorney or trustee, the filing agent permissions may be different, depending on the permissions granted.
- An attorney may also conduct business as a trustee (the individual is both an attorney and a trustee). A filing agent can be given the permissions to file on behalf of either capacity. Specific permissions can be given for each attorney or trustee for whom he or she is working.

SAMPLE Text for Filing Agents Linked to Multiple Attorney/Trustee Accounts:

Filing for:
Bill Attorney (aty)
John Attorney (aty)
Bill Attorney (tr)

- Most filing agents can run their own transaction log. However, just like the docket report, only the attorney or trustee will be listed as the filer. Nor will the filing agent's activity appear in Query if one searches by the agent's name.