

## INTRODUCTION

It may be necessary for some attorneys to have multiple paraprofessionals file electronically, or for one paraprofessional to file for multiple attorneys. Until now, there was no way to link these accounts. A new user type is now available: the Filing Agent.

With the implementation of the filing agent, an attorney or trustee may have several filing agents linked to their ECF account or one agent may be linked to several attorney accounts. When an agent files on behalf of an attorney, the docket text will display the attorney's name. This feature is available only to attorneys, trustees, and the Office of the U.S. Trustee.

## DEFINITIONS

For purposes of this tutorial:

Filer = attorney, trustee

User = attorney, trustee

Filing Agent ('Agent') = someone who files on behalf of an attorney, i.e. paralegal, legal assistant, etc.

Docket(ing) = submit for filing in the ECF system

Association = relationship between filer and agent

Court User = U.S. Bankruptcy Court employee

## FILING AS AN AGENT

When an agent logs into ECF, the agent's level of authority is dependent on the filer for whom the agent is docketing. Once the filer is selected, the permissions the filer has granted will remain active until the agent selects another filer, who may have granted different permissions. The agent's permissions will mirror the filer's unless the filer places restrictions, i.e. the ability to pay filing fees and/or upload proposed orders. Although filing agents are able to file/docket documents with restricted images, e.g. the Statement of Social Security Number(s), they are not able to view them. Note: Agents are not permitted to associate a default PACER login with their accounts.

1

## SELECTING A FILER

When a filing agent files on behalf of more than one filer, the agent must select the appropriate filer from the list at the login screen. The selection may be changed at any time without logging out, as described below.

## CHANGING FILERS

When the filing agent is logged in on behalf of a filer, the name of the filer is displayed below the menu bar:



The **Change user** button allows the filing agent to change filers. Clicking on this option displays all associated filers, and clicking on a name on the list changes the filer.

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For more information, for assistance, or to report a malfunction, contact the court at [CMECF\\_Support@flsb.uscourts.gov](mailto:CMECF_Support@flsb.uscourts.gov).

## DOCKET TEXT AND DISPLAY

In an entry made by a filing agent, the docket text and all associated information reflect that the entry was made by the filer. There is no indication that the entry was made by the agent on behalf of the filer. However, these transactions are logged. This information is available to court users, filers, and agents. The filing agent's name will only appear on the System Transactions report (for court users) and the [Transaction Log](#) (for the filer).

## TRANSACTION LOG

For a filer with one or more filing agents, a new [User](#) filter option now appears on the Transaction Log report. The report will list the filer's name and all agents associated with the filer. By selecting all agent names listed, the filer can view all transactions logged in her/his name. An additional [Filing agent](#) sort option appears when filing agents are presented.

**View Transaction Log**

Entered between 1/1/1996 and 8/24/2009

User  
Schwartz, Angela  
Davis, Amelia Jane

(D) indicates a deactivated filing agent

Sort by Date and time

Submit Clear

2

## MAINTAINING FILING AGENT ACCOUNTS

Filing agent accounts are maintained by the filer. Maintenance options include which agent is associated with a filer and whether the agent should receive electronic notices. The ability to modify access and email information is removed from the agent's [Maintain Your ECF Account](#) page and can only be modified by the filer or court user. Password changes may only be performed by the filer or court user. This is further clarified below.

Access authorizations are established and maintained by the associated filer. Filing agents are not permitted to access their own access permissions. The list of active filing agents displays names as hyperlinks. Clicking these links leads to a screen that allows for the filing agents' permissions to be set.

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## ASSOCIATIONS


Filing agent maintenance is available for attorneys and trustees on the [More User Information](#) option of the [Maintain User Account](#) utility screen.

**More User Information for Isabelle E Green**

<b>Login</b> IEGreen	<b>Last login</b> 08-09-2010 11:26
<b>Password</b> [masked] <small>[minimum 8; upper- &amp; lower-case letters; include digit or special character]</small>	<b>Current login</b> 08-10-2010 11:07
<b>Registered</b> Y	<b>Create date</b> 03/01/2007
<b>Internet Payment</b> Y	<b>Update date</b> 08/10/2010
<b>Groups</b> Attorney	

**Filing agents**  
*Uncheck the box to remove a filing agent.*

- [Adams, Jessica](#)
- [Bobeck, Lisa Ann](#) [office 1, 123 Main Street, Suite 2, Floor 4, Metropolis, CO 12345, (123) 456-7890]

Find filing agent  

[Agents previously removed from this account](#)

3

On the [Filing agent](#) section of this screen, any filing agent associated with a filer account is listed beside a checkbox.

A search of filing agents by last name can be performed by using the [Find filing agent](#) box. This report generates a listing of all filing agents matching the search criteria. If the selected name does not appear, the agent can be added by clicking on the [Create a new filing agent](#) hyperlink at the bottom of the page.

To remove or deactivate a listed agent, uncheck the box next to the agent's name. When the selection is saved, the association record between the filing agent and the filer is severed. The agent can be reinstated by clicking on the [Agents previously removed from this account](#) link. Clicking this link opens a panel listing all deactivated filing agents that were formerly associated with the filer. Clicking on the button next to the agent's name will reactivate the agent. The association between the agent and filer is re-established.

All actions to activate, modify, deactivate, or reactivate a filing agent account are recorded in the System Transaction and [Transaction Log](#) reports.

**NOTE:** Filing agents cannot be permanently deleted. Only the Filer (Attorney/Trustee) login and password may create, modify, deactivate, or reactivate a filing agent account after successfully logging in to CM/ECF. This includes [changing passwords](#).

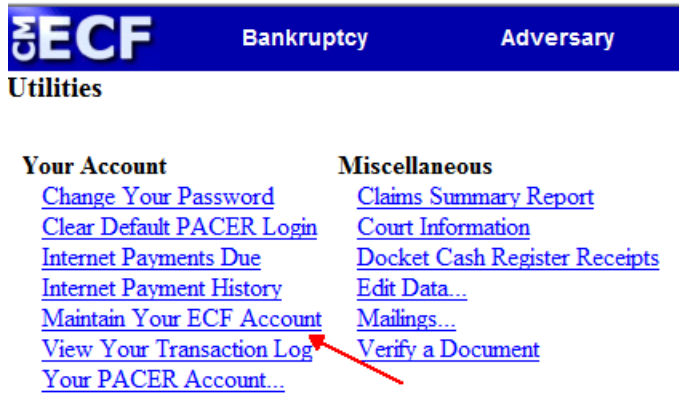
Instructions to create, modify, deactivate, and reactivate filing agents follow.

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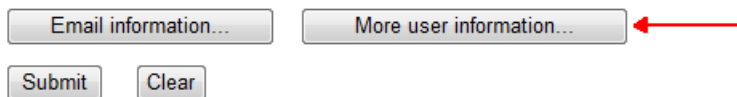
For more information, for assistance, or to report a malfunction, contact the court at [CMECF\\_Support@flsb.uscourts.gov](mailto:CMECF_Support@flsb.uscourts.gov).


## CREATE A FILING AGENT

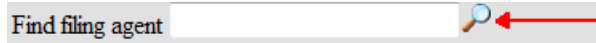
- Select **Utilities**
  - Click on **Maintain Your ECF Account:**



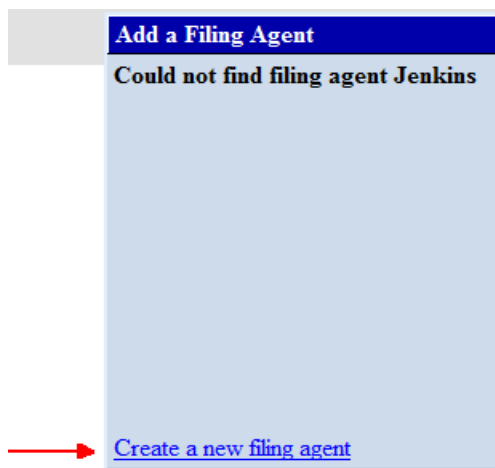
- The User Account appears
- Select **More user information:**



- A search must be performed prior to adding an agent. In the **Find filing agent** search box, enter the agent's last name; click on the magnifying glass icon  :



- If the filing agent name is found, do NOT add them again. If the agent cannot be found, click on the link **Create a new filing agent:**



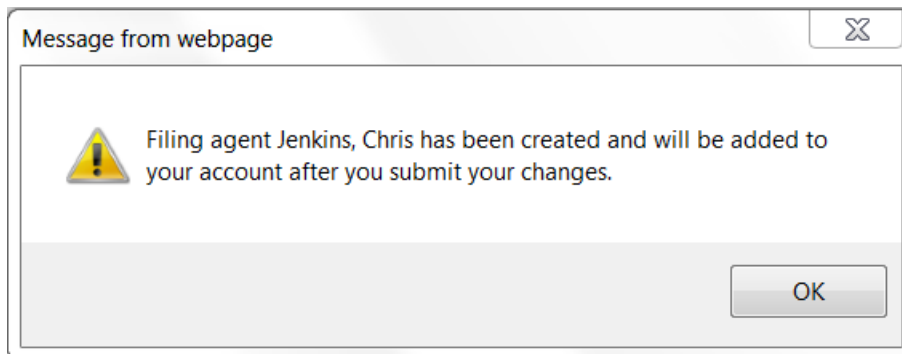
- Create a unique login using the last name, first initial, middle initial.
  - For example: Maria Lopez = lopezm  
Chris G. Jenkins = jenkinsc OR jenkinscg
  - NOTE: The system will not allow duplicate logins. For example, there are 2 paralegals named Pat Jones in the same office. You must distinguish between the two:  
The 1<sup>st</sup> Pat Jones = jonesp  
The 2<sup>nd</sup> Pat Jones = jonespa
- The program will automatically assign a password. If you elect to change the password, remember to follow compliance guidelines noted on the screen. The password can only be changed using an attorney login, not an agent's.
- Complete the last name and first name fields. The remaining fields may remain blank:

## Filing Agent Information

<b>Login</b>	<input type="text" value="jenkinsc"/>	←
<b>Password</b>	<input type="text" value="s3Ve?Vov"/>	←
	<i>[minimum 8; upper- &amp; lower-case letters; include digit or special character]</i>	←
<b>Last name</b>	<input type="text" value="Jenkins"/>	←
<b>First name</b>	<input type="text" value="Chris"/>	←
<b>Middle name</b>	<input type="text"/>	
<b>Generation</b>	<input type="text"/>	
<b>Title</b>	<input type="text"/>	
<b>Office</b>	<input type="text"/>	
<b>Address 1</b>	<input type="text"/>	

5

- <Submit>
- Confirmation screen appears; <ok>



- <Return to Account screen>
- <Return to Maintain User Account>
- <Submit>
- <Submit>

For more information, for assistance, or to report a malfunction, contact the court at [CMECF\\_Support@flsb.uscourts.gov](mailto:CMECF_Support@flsb.uscourts.gov).

- The filing agent has been added to the filer's account and may proceed to docket. When the filing agent logs in to CM/ECF, the filer name will display below the menu bar:

The screenshot shows the CM/ECF interface for a Bankruptcy user. The menu bar at the top is blue with the CM/ECF logo on the left and the word 'Bankruptcy' on the right. Below the menu bar, the text 'Filing for Cameron ^Cradic (aty)' is displayed, with a red arrow pointing to it from the right. Below this, the section 'Bankruptcy Events' is titled, followed by a list of links: 'Open Voluntary BK Case', 'Open Involuntary BK Case', 'Creditor Maintenance...', 'Judge/Trustee Assignment', 'Order Upload', 'Batch Filings', 'Appeal', 'Other Plan', 'Claim Actions', 'File Claims', 'Motions/Applications', 'Answer/Response...', 'Attorney-Filed Documents', and 'Notices'.

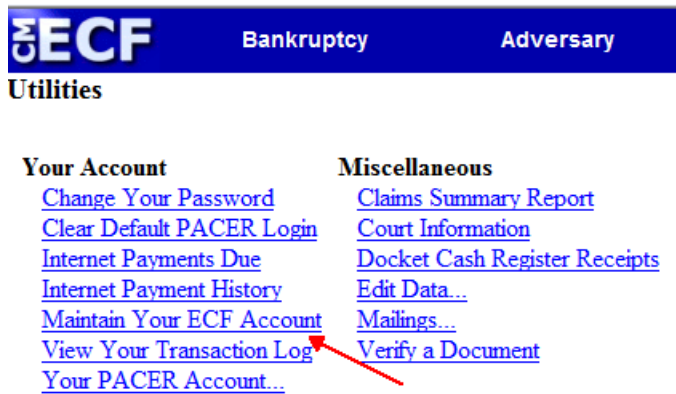
- When an attorney has multiple filing agents associated with his attorney account, the agents will display on the attorney's [More User Information](#) screen:

The screenshot shows the 'More User Information' screen for Cameron ^Cradic. The menu bar at the top is blue with the CM/ECF logo on the left, 'Bankruptcy' in the center, and 'Adversary' on the right. Below the menu bar, the text 'More User Information for Cameron ^Cradic' is displayed. The screen shows the following information: 'Login cradiccaty', 'Registered Y', 'Internet Payment Y', 'Groups Attorney, E-Orders Attorney', 'Current login 09-2', 'Create date 12/1:', 'Update date 09/1:', and 'Last login 09-1'. Below this, there is a note: '[See the Utilities menu for the "Change Your Password" option]'. The 'Filing agents' section is highlighted in grey and contains the text 'Uncheck the box to remove a filing agent.' followed by a list of agents with checkboxes: 'Davis, Rachel [, FL]', 'Ferere, Ellen [, FL]', 'Jenkins, Chris [, FL]', 'Lopez, Manuel [, FL]', and 'Valdez, Juanita C. [, FL]'. Each agent name has a red arrow pointing to it from the right. Below the list is a search box labeled 'Find filing agent' with a magnifying glass icon. Below the search box is a link: '[Agents previously removed from this account](#)'. At the bottom of the screen are two buttons: 'Return to Account screen' and 'Clear'.

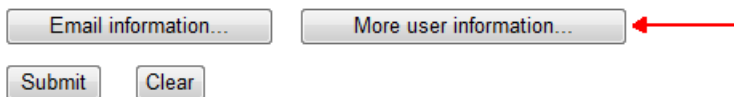
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## MODIFY A FILING AGENT

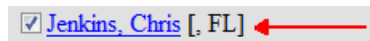
- Select **Utilities**
- Click on **Maintain Your ECF Account:**



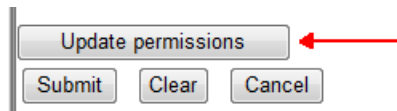
- The User Account appears
- Select **More user information:**



- Click on filing agent name link:



- Filing agent information screen appears.
- **<Update permissions>**



- **Internet Payment:** Default is N; select Y if the filing agent will be submitting filing fee payments on behalf of the filer.
- **Attorney:** Default is highlighted; may remain selected if the filing agent will have same filing permissions as filer.
- **E-orders Attorney** permissions: Default is highlighted; may be de-selected if the filing agent will not be uploading proposed orders on behalf of the filer.

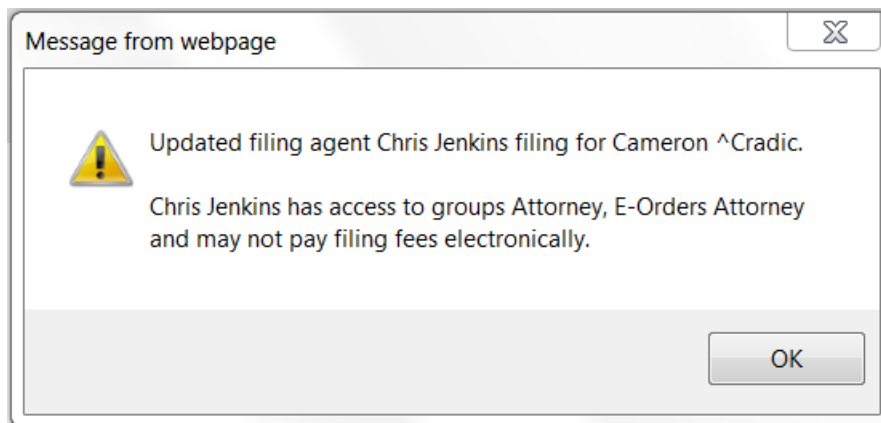
**Filing Agent Permissions: Chris Jenkins filing for Cameron ^Cradic**

Internet Payment  ←

Groups  ←

↑

- <Return to account screen>
- <Submit>
- Confirmation screen appears; <ok>



- <Return to account screen>
- <Submit>
- <Submit>

Modifications are complete.



## DEACTIVATE A FILING AGENT

- Select **Utilities**
- Click on **Maintain Your ECF Account:**

**CM/ECF** Bankruptcy Adversary

**Utilities**

**Your Account**

- [Change Your Password](#)
- [Clear Default PACER Login](#)
- [Internet Payments Due](#)
- [Internet Payment History](#)
- [Maintain Your ECF Account](#)
- [View Your Transaction Log](#)
- [Your PACER Account...](#)

**Miscellaneous**

- [Claims Summary Report](#)
- [Court Information](#)
- [Docket Cash Register Receipts](#)
- [Edit Data...](#)
- [Mailings...](#)
- [Verify a Document](#)

- The User Account appears
- Select **More user information:**

Email information... More user information... Submit Clear

- Uncheck the box next to the filing agent name:

**Filing agents**

Uncheck the box to remove a filing agent.

[Jenkins, Chris \[, FL\]](#)

Find filing agent

[Agents previously removed from this account](#)

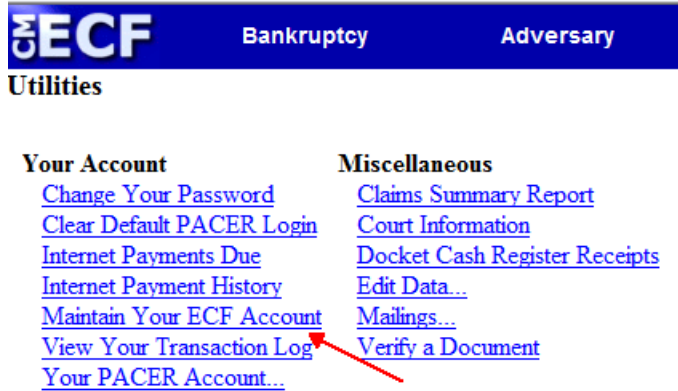
Return to Account screen Clear

- **<Return to Account screen>**
- **<Return to Maintain User Account>**
- **<Submit>**
- **<Submit>**

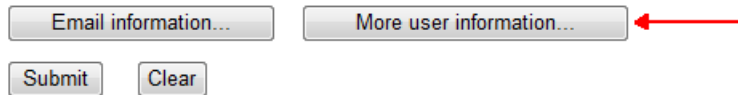
The filing agent has been deactivated.

## REACTIVATE A FILING AGENT

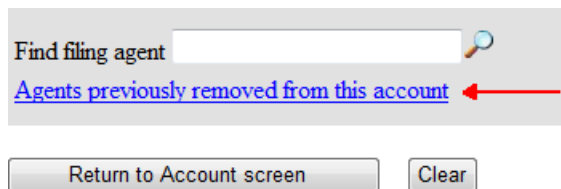
- Select **Utilities**
- Click on **Maintain Your ECF Account:**



- The User Account appears
- Select **More user information:**



- Click on the link for **Agents previously removed from this account:**



- Click the **Select** button next to the filing agent being reactivated:



- <Return to Account screen>
- <Return to Maintain User Account>
- <Submit>
- <Submit>

The filing agent has been reactivated.

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