Using Filing Agents

INTRODUCTION - Attorneys and trustees can create special logins for employees who file on behalf of them in ECF. These user types will have their own login and password. A filing agent may be linked to multiple attorneys and trustees and attorneys and trustees may have multiple filing agents.

Only the attorneys' or trustees' names will appear on the docket report, queries and other case management reports. The filing agents' name will never appear to the public.

The access permissions available to the filing agent are dependent on the permissions of the attorney or trustee for whom the filing agent is docketing. The court controls the permissions available to the attorney or trustee; however, the attorney or trustee controls the filing agent's ability to make fee payments on their behalf. Filing agents cannot have more permissions than the attorney or trustee.

The filing agent may receive email, but only if the attorney or trustee places the filing agent's email address in the "Send notices to these additional addresses" section in the attorney or trustee's email record of their User Account.

Before the filing agent may be associated with the attorney or trustee, the filing agent must have his/her own ECF filing account.

- If the filing agent has never had an ECF filing account, the filing agent must go to www.pacer.gov, register for a PACER account, then go to Manage My Account, click on the Maintenance tab, and select Non-Attorney E-File Registration.

- If the filing agent has an ECF filing account, the filing agent must link his/her own upgraded PACER account to his/her ECF filing account.

- Any filing agent relationship established before the Court installed NextGen on September 28, 2015 will be maintained.

The activation or deactivation of a filing agent is accomplished through an attorney or trustee's person record in the Maintain Your ECF Account utility.

CREATING A FILING AGENT

STEP 1. Access your person record using **Utilities/ Maintain Your ECF Account**.
Click **More user information**.

STEP 2. Search for an existing filing agent name by inserting the name of the filing agent in the text box immediately next to "Find filing agent." Click the **search icon**.

- ❏ This search generates a panel listing all filing agents that match your search criteria.
- ❏ If the correct filing agent is found, click **Select** to associate this filing agent with your account.
- ❏ Click **Return to Account screen.**
- ❏ Click **Submit** on the Maintain User Account screen.

STEP 3. 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 not, no action needs to be taken.

NOTE: The filing agent cannot make this setting on his or her own. It must be made through the attorney or trustee user account. It can be changed at any time after the filing agent account is activated.

- ❏ If you want the filing agent to pay fees on your behalf, return to **Utilities/Maintain Your ECF Account** and click **More user information** on your address screen.
- ❏ The screen will display filing agents associated with you. The filing agent's name will display as a hyperlink. Click the hyperlink..
- ❏ The permissions screen will display. Change **Internet Payment** options from N to **Y** and click **Save.**
- ❏ Click **Return to Account screen**.
- ❏ Click **Submit** on the Maintain User Account screen.

DEACTIVATING A FILING AGENT

Step 1. A filing agent no longer associated with an attorney or trustee should be deactivated to ensure security.

- ❏ Access your person record using **Utilities/ Maintain Your ECF Account**. Click **More user information**.

- ❏ Uncheck the box immediately to the left of the filing agent's name to deactivate the association.

- ❏ Click **Return to Account screen**.

- ❏ Click **Submit**

  NOTE: Deactivation of the association of a filing agent from an attorney or trustee does not delete the filing agent from the ECF database. Only the association between the filing agent and attorney or trustee is removed. The filing agent may still be associated with another attorney or trustee.

STEP 2. View the identity of any filing agents previously associated with your account.

- ❏ Access your person record using **Utilities/ Maintain Your ECF Account**. Click **More user information**.

- ❏ In the Filing Agents field, click the **Agents previously removed from this account** hyperlink.

- ❏ To reinstate an agent previously removed, click the **Select** button next to the agent's name.

ASSOCIATING AGENT'S E-MAIL ADDRESS WITH ATTORNEY OR TRUSTEE RECORD

If you want to enable the filing agent to receive notices of electronic filing [NEF], the filing agent's email address must be listed in your email information in the User Account as a secondary address.

- ❏ Access your person record using **Utilities/Maintain Your ECF Account**, and then click **Email information**.

- ❏ In the text box immediately adjacent to **Secondary email address**, enter the email address(es) desired. Separate multiple addresses with a comma.

- ❏ In the text box immediately adjacent to **Reenter secondary email address**, enter the email address(es) again. The system will require the text boxes to match.

- ❏ Under "Send the notices specified below", click **to the secondary addresses**.

- ❏ Click **Return to Account screen** and then **Submit.**

REVIEWING TRANSACTIONS PERFORMED BY THE FILING AGENT

- ❏ Click on **Utilities/View Transaction Log.**
- ❏ Adjust the date range to the desired period.
- ❏ If desired, choose a filing agent. The default will show transactions by all listed users.
- ❏ Click **Submit.**