

About Filing Agents (BK Only)

The attorney/trustee (who must be a member of the attorney, trustee or US Trustee user group) links filing agents to his own CM/ECF account in each bankruptcy court via the **Maintain Your ECF Account** utility which create a filing_agent_assoc record.

An attorney must have a PACER account to link filing agents to his CM/ECF account.

Existing Filing Agents: must upgrade and link as an attorney does when you go live on NextGen.

New Filing Agents, after you grant approval to access your court through the **CSO Administration: Public Users** utility, the filing agent must be associated to an attorney before they can log on to file. Only the attorney can associate his agents. Court staff are not authorized to add a filing agent for an attorney.

Add a Filing Agent

Only attorneys can create the filing_agent_assoc record in his **Maintain Your ECF Account, More Information** utility. Attorneys must have a PACER account to create a filing_agent_assoc record.

STEP 1 Select the **Maintain Your ECF Account** link.



Utilities

Your Account	Legal Research
Internet Payments Due	Legal Research...
Internet Payment History	Release 5.0 Menu Items
1 Maintain Your ECF Account	NextGen Release 1.1 Menu Items
View Your Transaction Log	NextGen Release 1.2 Menu Items
Your PACER Account...	
Miscellaneous	
Court Information	
File a Transcript	
Mailings...	
Verify a Document	

STEP 2 Select the **More user information** button.



Bar ID	Bar status
Initials	DOB 05/09/1962
Person end date	
<input type="button" value="Email information..."/>	2 <input type="button" value="More user information..."/>
<input type="button" value="Submit"/>	<input type="button" value="Clear"/>

Non-Attorney E-File Request

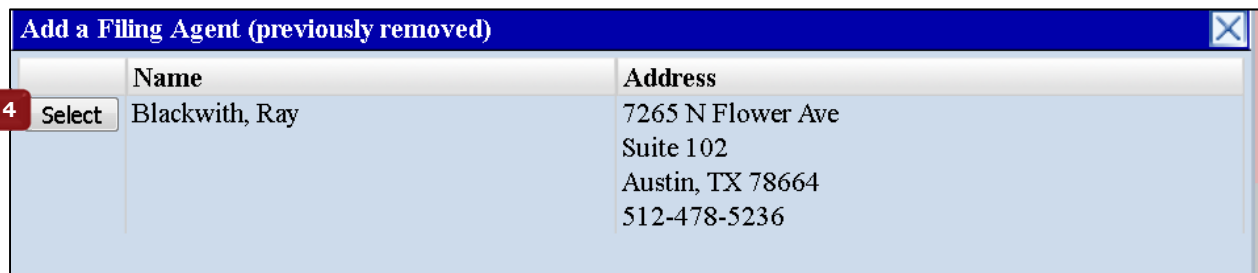
STEP 3 At the bottom of the **More user Information** screen, enter the agents name in the **Find filing agent** text field and click the **search icon**.



Filing agents

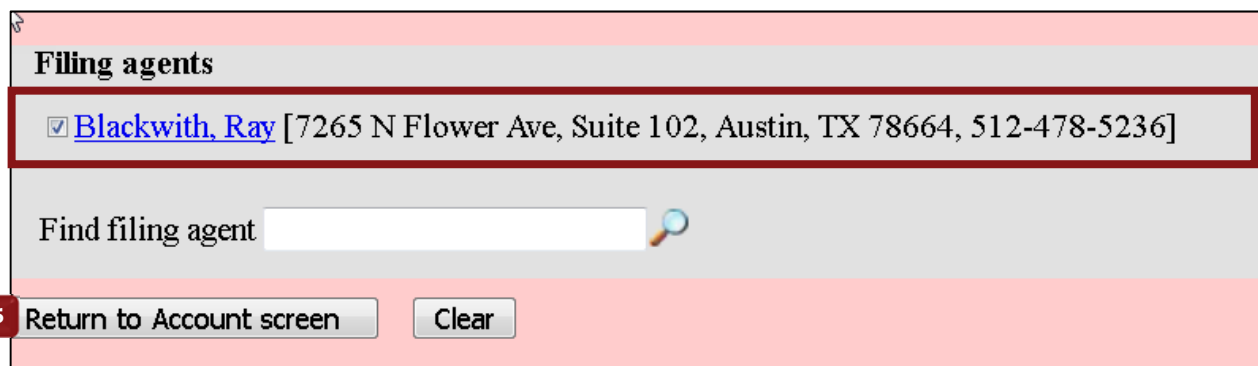
Find filing agent 

STEP 4 In the **Filing agents** pop up screen under **Add Filing Agent**, click the **Select** button next to the agent you wish to create an association with.




	Name	Address
<input type="button" value="Select"/>	Blackwith, Ray	7265 N Flower Ave Suite 102 Austin, TX 78664 512-478-5236

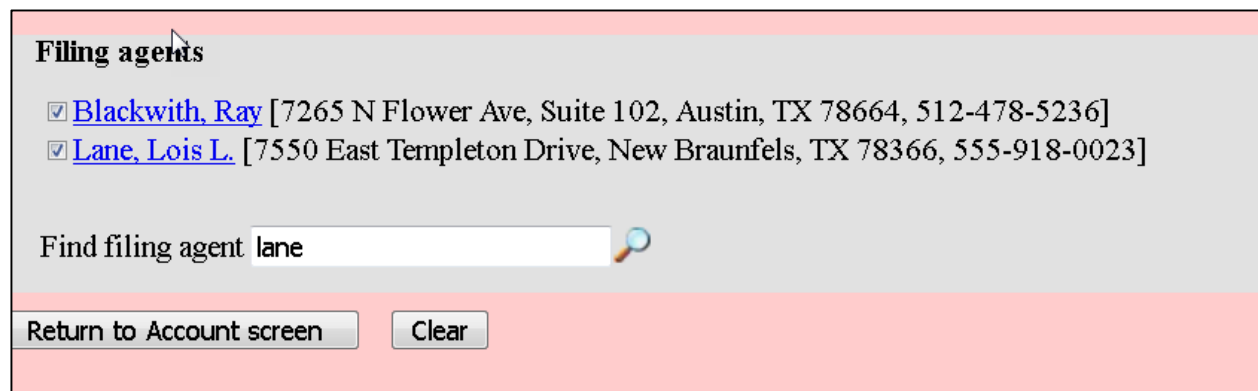
STEP 5 The association has been created and the agent now appears on the active agent list. Add additional agents or click the **Return to Account** screen button to **Submit** and save the change.



Filing agents

[Blackwith, Ray](#) [7265 N Flower Ave, Suite 102, Austin, TX 78664, 512-478-5236]


Find filing agent 



Filing agents

[Blackwith, Ray](#) [7265 N Flower Ave, Suite 102, Austin, TX 78664, 512-478-5236]

[Lane, Lois L.](#) [7550 East Templeton Drive, New Braunfels, TX 78366, 555-918-0023]

Find filing agent 

Non-Attorney E-File Request

STEP 6 In the **Maintain User Account** screen click **Submit**.

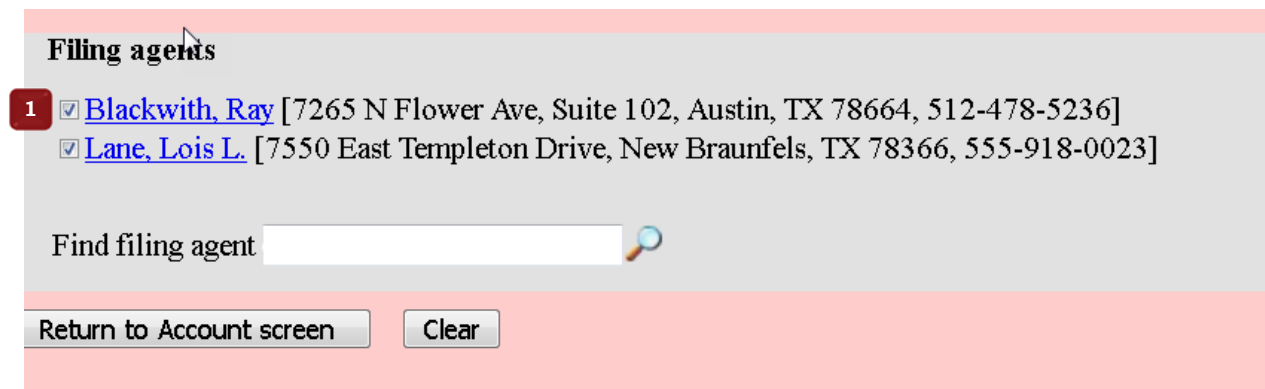


The screenshot shows a user account maintenance form with the following fields and buttons:

- Alternate Phone: [text input]
- Text Phone: [text input]
- Bar ID: [text input]
- Bar status: [text input]
- Initials: [text input]
- DOB: 05/09/1962
- Person end date: [text input]
- Email information...: [button]
- More user information...: [button]
- Submit: [button]
- Clear: [button]

Update a filing agent

STEP 1 From the bottom of the **More User Information** screen, select the agent you wish to update by clicking on the agents name.



The screenshot shows the 'Filing agents' section with the following elements:

- Filing agents** (Section Header)
- 1 [Blackwith, Ray](#) [7265 N Flower Ave, Suite 102, Austin, TX 78664, 512-478-5236]
- [Lane, Lois L.](#) [7550 East Templeton Drive, New Braunfels, TX 78366, 555-918-0023]
- Find filing agent: [text input] [magnifying glass icon]
- Return to Account screen: [button]
- Clear: [button]

STEP 2 Update the Internet Payment options or add the agent to a permission group the attorney belongs to. Click **Save**



The screenshot shows the 'Update Filing Agent Permissions' dialog box for 'Ray Blackwith filing for Ann Fredericks'. It contains the following fields and options:


- Internet Payment: N (dropdown)
- Groups: Attorney (selected), Filing Agent, LimitedFilerGroup1, ParaLegal1 (list)
- Save: [button]
- Clear: [button]

Non-Attorney E-File Request

STEP 3 Click **Return to Account screen** to submit and save the changes.

Filing agents

[Blackwith, Ray](#) [7265 N Flower Ave, Suite 102, Austin, TX 78664, 512-478-5236]
 [Lane, Lois L.](#) [7550 East Templeton Drive, New Braunfels, TX 78366, 555-918-0023]

Find filing agent 

3

STEP 4 Click **Submit** to save the changes to the database. Be sure to wait for the confirmations screen.

Alternate Phone **Text Phone**
Bar ID **Bar status**
Initials **DOB** 05/09/1962
Person end date

4

Maintain User Accounts

Updating person record...
Successfully updated Ann Fredericks
Successfully updated user annfredericks95

Participant records were not altered.

No email edit requested

User edit complete
[Return to User Maintenance](#)

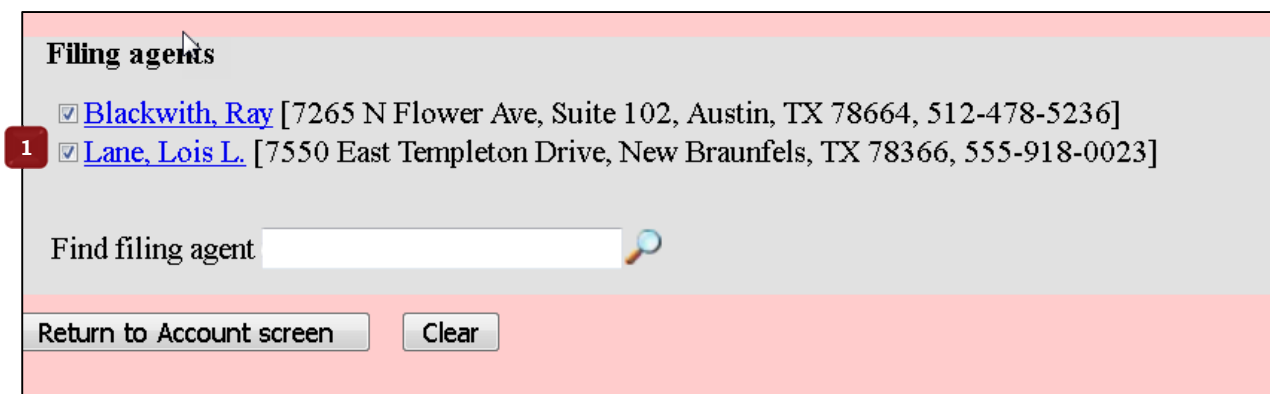
Remove a Filing Agent

Removing the agent from the attorneys active list does not remove the agent from the data base. Remove the agent's person record from the database through **Maintain User Account**.

If the agent is associated with other attorneys, then the agent will still be able to log in and file for associated attorneys.

If the agent is not associated with other attorneys, then the agent will get an error screen when they attempt to log in to CM/ECF and can not access the database.

STEP 1 From the attorneys **Maintain User Account, More User Information** screen, Uncheck the check box next to the agent you wish to remove. You will automatically return to the Maintain User Account Screen.

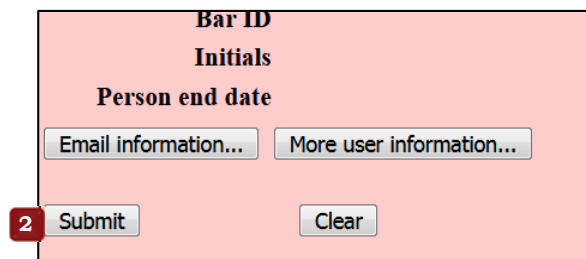


Filing agents

- [Blackwith, Ray](#) [7265 N Flower Ave, Suite 102, Austin, TX 78664, 512-478-5236]
- 1** [Lane, Lois L.](#) [7550 East Templeton Drive, New Braunfels, TX 78366, 555-918-0023]

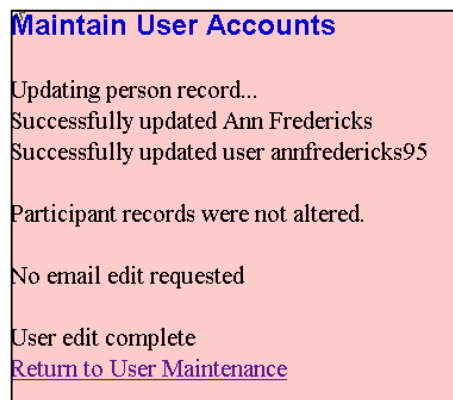
Find filing agent

STEP 2 Click **Submit** to save the changes to the database. Be sure to wait for the confirmations screen.



Bar ID
Initials
Person end date

2



Maintain User Accounts

Updating person record...
Successfully updated Ann Fredericks
Successfully updated user annfredericks95

Participant records were not altered.

No email edit requested

User edit complete
[Return to User Maintenance](#)


Non-Attorney E-File Request

The agent is now removed from the attorney's agent list. The attorney can reverse the removal by clicking on the **Agents previously removed from this account** link then click **Select** next to the agent's name to reinstate the agent back to the active list.


Filing agents

Uncheck the box to remove a filing agent.

[Blackwith, Ray](#) [7265 N Flower Ave, Suite 102, Austin, TX 78664, 512-478-5236, Account ID: 7033441]

Find filing agent 

[Agents previously removed from this account](#)

Add a Filing Agent (previously removed) 


	Name	Address
<input type="button" value="Select"/>	Lane, Lois L.	7550 East Templeton Drive New Braunfels, TX 78366 555-918-0023

The agent is reinstated to the active list and the link is gone.

Filing agents

[Blackwith, Ray](#) [7265 N Flower Ave, Suite 102, Austin, TX 78664, 512-478-5236]

[Lane, Lois L.](#) [7550 East Templeton Drive, New Braunfels, TX 78366, 555-918-0023]

Find filing agent 

A Filing Agents View

When a filing agent logs on to PACER then your court, he or she will see the below message. They must select an attorney before proceeding.

Filing for
Ann Fredericks (aty)
Karen Smith (aty)

The selection can be changed at any time by selecting the **Change user** button on the menu bar; it redisplayes the list.

Filing for Karen Smith (aty)	 Change user
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Filing for
Ann Fredericks (aty)
Karen Smith (aty)

Filing for Ann Fredericks (aty)	 Change user
Bankruptcy Events	

Docket Text Filed by a Filing Agent

When an agent files on behalf of the attorney, the docket text shows the attorney's name; no indication is made that it was filed by an agent. However, this information is logged and available to court users and filers with agents.

Proposed Motion to Dismiss Case Filed by Ann Fredericks on behalf of Debtor Wayne C. Morrison Fredericks, Ann) (Entered: 03/23/2018)

Although for PACER the agent must supply an email address to PSC, and will have a primary email recorded in CM/ECF, the agent will not receive email notifications from CM/ECF.

Attorney Transaction Log

Throughout most of the application, the agent's name does not appear; the exceptions are the System Transactions Report and the Transaction Log

View Transaction Log

Entered between and

User

(D) indicates a deactivated filing agent

Sort by

Transaction Log
Report Period 01/01/1996 - 03/23/2018

Id	Date	Case Number	Text
129346	03/23/2018 08:57:25	10-10031	Proposed Motion to Dismiss Case Filed by Ann Fredericks on behalf of Debtor Wayne C. Blackwith, Ray Morrison Fredericks, Ann)

Total Number of Transactions: 1

Non-associated Filing Agent

If the agent logs on and is not yet associated with an attorney she will receive this error.

Your account is not set up to file for another user. Please contact your employer or the court for further assistance.