# Filing Agents User Guide

#### October 2021

Attorneys and trustees can add employees who file on behalf of them as Filing Agents in <u>CM/ECF</u>. Each Filing Agent must have his/her own individual <u>PACER</u> account; instructions for obtaining a PACER account for a Filing Agent can be found by clicking <u>HERE</u>. A Filing Agent may be linked to multiple attorneys and trustees, and attorneys and trustees may have multiple filing agents.

The <u>linking of a filing agent</u> is accomplished through an attorney or trustee's person record in the Maintain User Accounts utility of <u>CM/ECF</u>.

When a Filing Agent files on behalf of the attorney or trustee, the docket text shows the attorney's or trustee'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. Throughout most of the application, the agent's name does not appear; the exceptions are the Systems Transactions Report and the Transaction Log.

If a Filing Agent works for only one filer, the agent's transactions are always made on behalf of that filer. However, if a Filing Agent works for more than one filer, the agent must select the desired filer from a list before proceeding to the application:

Filing for
Charlene Darlene (aty)
Rico Suave (aty)

The name of the filer for whom the agent is currently acting is displayed on the menu bar in CM/ECF:

CMmECF	Ba <u>n</u> kruptcy <del>-</del>	<u>A</u> dversary <del>-</del>	<u>O</u> uery	<u>R</u> eports 🗸
Filing for Charlene Darlene	(aty) 🛛 👸 Cha	nge user		

The selection can be changed at any time by clicking the Change user button on the menu bar; it redisplays the list of possible filers and clicking a name on the list changes the user.

Filing Agents have the same access permissions as the attorney or trustee for whom the agent is filing.

**NOTE:** Although for <u>PACER</u> the Filing Agent must supply an email address to the PACER Service Center and will thus have a primary email recorded in <u>CM/ECF</u>, the Filing Agent will not receive email notifications from <u>CM/ECF</u>. The attorney or trustee can place the Filing Agent's email address in the "Send notices to these additional addresses" section of the attorney or trustee's email record in <u>CM/ECF</u> if the attorney or trustee wants the Filing Agent to receive email notifications.

#### To link a filing agent:

**STEP 1** Go to the Court's <u>CM/ECF</u> site (e.g., <u>https://ecf.gasb.uscourts.gov</u>). Click the Document Filing System link:



**STEP 2** Log in with your <u>PACER</u> user name and password:

Your browser must be set to accept cookies to log cookie file in your PC. Close and reopen your brow	; in to this site. If your browser is set to accept cookies and you are experiencing problems with the login, delete the stored ser before trying again.
	Login
	*Required Information
	Username *
	Password *
	Client Code
	Login         Clear           Forest nessword?         Forest usersame?         Need an account?           This is a restricted government website for official PACER use         Need an account?
	only. All activities of PACER subscribers or users of this system for any purpose, and all access attempts, may be recorded and monitored by persons authorized by the federal judicary for improper use, protection of system security, performance of maintenance and for appropriate management by the judicary of its systems. By subscribing to PACER, users expressly consent to
	system monitoring and to official access to data reviewed and created by them on the system. If evidence of unlawful activity is discovered, including unauthorized access attempts, it may be reported to law enforcement officials.

**STEP 3** Check the box to indicate that you understand, if you file, you must comply with the redaction rules and have read the important notice of redaction responsibility. Click **Continue**:



**STEP 4** Choose the court by clicking the drop-down list "Where would you like to go?" and click **Submit**:

Logged in as J	John Trustee
Please choose a co	purt.
Client Code	
Court	Where would you like to go?
Not John Trustee? Click here to log in as a	Submit Clear

STEP 5 Click Utilities, and then click the Maintain Your ECF Account link under Your Account:



STEP 6 Click More user information:

Last name	Neibel-Atty	First name Courtney	
Middle name		Generation	
Title		Type aty	
Office	Neibel Law Firm Test	□ Add Headers to PDF Documents	
Address 1	123 Any Street		
Address 2			
Address 3			
City	Savannah	State GA	2
Country	USA	County	$\checkmark$
Phone	555-555-3232	Fax	
Alternate Phone		Text Phone	
Bar ID		Bar status	Mail gro
Initials		<b>DOB</b> 01/01/1999	AO co
Person end date			
ail information	More user information		

**STEP 7** Under **Filing agents**, enter the last name of the filing agent in the box next to *Find filing agent* and click the magnifying glass:

CMmECF	Bankruptcy 🗸	Adversary 🗸	Query	Reports 🗸	Utilities 🗸	Search	Help	Log Out
More User Information for	Courtney Nei	bel-Atty						
Update Account I	information			Last lo	gin 09-23-20	21 15:51		
Login cr	neibatty			Current lo	gin 09-29-20	21 12:32		
Person ID 13	3414553			Create d	ate 09/16/20	21		
Person Authorization ID 32	2			Update d	ate 09/29/20	21		
Public User ID 70	008151			User end d	ate			
Judiciary User ID								
E-Filing Status A	ctive							
Internet Payment Y								
Groups Attorney, E-Orders Attorney, FinMgtPro								
Filing agents								
Find filing agent Agents previously remove	ed from this acc	ount	1					
Return to Account screen	Clear							

**Note:** the Filing Agent must have his/her own PACER account and register for e-filing access with the Court <u>prior to</u> being linked to the attorney/trustee account.

**STEP 8** Review the pop-up to make sure you have the correct filing agent, then click **Select**:



The filing agent will now appear in this account under Filing agents:

CM ECF Bankruptcy - A	dversary 🗸	Query	Reports 🗸	Utilities 🗸	Search	Help	Log Out	
More User Information for Courtney Neibel	-Atty							
Update Account Information	Update Account Information Last login 09-29-2021 12:32							
Login cneibatty			Current lo	gin 09-29-20	21 12:40			
Person ID 13414553			Create d	ate 09/16/20	21			
Person Authorization ID 32			Update date 09/29/2021					
Public User ID 7008151			User end d	ate				
Judiciary User ID								
E-Filing Status Active								
Internet Payment Y								
Groups Attorney, E-Orders Attorney, FinMgtPro								
Filing agents								
Filing-Agent, Clarissa [355 Filing Agent Ave., Savannah, GA 31410, 912-650-4000]								
Find filing agent Filing-Agent								
Agents previously removed from this account								
Return to Account screen Clear								

Click on the link to the filing agent's name to **Update Filing Agent Permissions** for Internet Payment and Groups and click **Save** to continue:

More User Information for Courtney Neibel-Atty		
Update Account Information	Last login 09-29-2021 12:32	
Login cneibatty	Current login 09-29-2021 12:40	
Person ID 13414553	Create date 09/16/2021	
Person Authorization ID 32	Update date 09/29/2021	
Public User ID 7008151	User end date	
Judiciary User ID		
E-Filing Status Active		
Internet Payment Y		
Groups Attorney, E-Orders Attorney	y, FinMgtPro	
Find agents       355 Filing Agent Ave., Sa         Find filing a nt Filing-Agent       Agents previously removed from this account         Return to Account screen       Clear	wannah, GA 31410, 912-650-4000]	Update Filing Agent Permissions Clarissa Filing-Agent filing for Courtney Neibel- Atty Internet Payment Groups Attorney E-Orders Attorney FinMgtPro  Save Clear

**STEP 9** To save the filing agent, click **Return to Account screen**:

More User Information for Courtney Neibel-Atty	
Update Account Information	Last login 09-29-2021 12
Login cneibatty	Current login 09-29-2021 12
Person ID 13414553	Create date 09/16/2021
Person Authorization ID 32	Update date 09/29/2021
Public User ID 7008151	User end date
Judiciary User ID	
E-Filing Status Active	
Internet Payment Y	
Groups Attorney, E-Orders Attorn	ney, FinMgtPro
Filing agents	
Elling Agent Clasicas E255 Eiling Agent Are	Savannah, GA 31410, 912-650-4000]
rinig-Agent, Clarissa [555 Filing Agent Ave.,	
■ <u>Fining-Agent, Clarissa</u> [555 Fining Agent Ave.,	
Find filing agent Filing-Agent	
Find filing agent Filing-Agent	
Find filing agent Filing-Agent	

Finally, click Submit:

Last name	Neibel-Atty	First name	Courtney		
Middle name		Generation			
Title		Туре	aty		
Office	Neibel Law Firm Test	🗆 Add Head	ers to PDF Documents		
Address 1	123 Any Street				
Address 2					
Address 3					
City	Savannah	State	GA		
Country	USA	County		$\sim$	
Phone	555-555-3232	Fax			
Alternate Phone		Text Phone			
Bar ID		Bar status			Mail g
Initials		DOB	01/01/1999		AO
Person end date					
Email information	More user information				

## To unlink a filing agent:

- **STEP 1** Follow Steps 1-6 above of **To link a filing agent** to reach the **More User Information** screen in CM/ECF.
- **STEP 2** All of the filing agents linked to the user account will be listed:

CMmecf	Bankruptcy 🗸	Adversary 🗸	Query	Reports 🗸	Utilities 🗸	Search	Help	Log Out
More User Information fo	r Courtney Nei	bel-Atty						
Update Account	Information			Last lo	gin 09-29-20	021 12:32		
Login	cneibatty			Current lo	gin 09-29-20	021 12:40		
Person ID	13414553			Create d	late 09/16/20	21		
Person Authorization ID	32			Update d	late 09/29/20	21		
Public User ID	7008151			User end d	late			
Judiciary User ID								
E-Filing Status	Active							
Internet Payment	Y							
Groups	Attorney, E-Ord	ers Attorney, F	inMgtPro					
Filing agents								
Uncheck the box to remo	we a filing ageni							
Filing-Agent, Clariss	[355 Filing Ag	ent Ave., Savar	nnah, GA	31410, 912-6	550-4000, Ac	count ID:	704430	4]
Find filing agent		$\mathcal{P}$						
Agents previously remov	ved from this acc	ount						
Return to Account screen	Clear							

**STEP 3** To unlink a filing agent, uncheck the box next to the filing agent's name, then click **Return to Account screen**:

	<ul> <li>Adversary -</li> </ul>	Query	Reports 🗸	Utilities 🗸	Search	Help	Log Out	
More User Information for Courtney	Neibel-Atty							
Update Account Information			Last lo	gin 09-29-20	021 12:32			
Login cneibatty			Current lo	gin 09-29-20	21 12:40			
Person ID 13414553			Create d	ate 09/16/20	21			
Person Authorization ID 32			Update d	ate 09/29/20	21			
Public User ID 7008151			User end d	ate				
Judiciary User ID								
E-Filing Status Active								
Internet Payment Y								
Groups Attorney, E-O	orders Attorney, F	inMgtPro						
Filing agents								
Lincheck the box to remove a filing ag	ent.							
✓ Filing-Agent, Clarissa [355 Filing	Agent Ave., Sava	nnah, GA	31410, 912-6	50-4000, Ac	count ID:	704430	4]	
Find filing agent	$\sim$							
Agents previously removed from this	account							
Return to Account screen Clear								

STEP 4 Click Submit to complete:

Last name	Neibel-Atty	First name Courtne	y	
Middle name		Generation		
Title		Type aty		
Office	Neibel Law Firm Test	Add Headers to P	DF Documents	
Address 1	123 Any Street			
Address 2				
Address 3				
City	Savannah	State GA		1
Country	USA	County		$\sim$
Phone	555-555-3232	Fax		
Alternate Phone		Text Phone		
Bar ID		Bar status		Mail gro
Initials		DOB 01/01/19	999	AO c
Person end date				
Empil information	More user information			

### To relink a previously used filing agent:

- **STEP 1** Follow Steps 1-6 above of **To link a filing agent** to reach the **More User Information** screen in <u>CM/ECF</u>.
- **STEP 2** On the **More User Information screen**, a link to **Agents previously removed from this account** will display – click this link to view a list of Filing Agents that have been previously unlinked from your account:



	8 8 4		
	Name	Address	
Select	Jones, Marsha	15 LaFayette Square	
		St. Mary's, GA 31558	
		912-882-8899	

**STEP 3** Follow Steps 8-9 above of **To link a filing agent** in order to relink this Filing Agent to your account.

#### To enable a Filing Agent to receive email from CM/ECF:

To enable a Filing Agent to receive emailed notices of electronic filing from <u>CM/ECF</u>, the Filing Agent's email address must be added to the attorney or trustee's email preferences as a secondary address. The secondary email information screen will allow multiple email addresses, separate by commas or semi-colons.

**STEP 1** Go to the Court's <u>CM/ECF</u> site (e.g., <u>https://ecf.gasb.uscourts.gov</u>). Click the Document Filing System link:



**STEP 2** Log in with your <u>PACER</u> user name and password:

cookie file in your PC. Close and rec	pen your browser before trying again.	<u> </u>
	Login	
	* Required Information	
	Username *	
	Password *	
	Client Code	
	Login Clear Eroot password? For root username? Veed an account? This is a restricted government website for official PACER use only. All activities of PACER subscribers or users of this system for any purpose, and all access attempts, may be recorded and monitored by persons authorized by the federal judiciary for improper use, protection of system security, performance of maintenance and for appropriate management by the judiciary of its systems. By subscribing to PACER, users expressly consent to system monitoring and to official access to data reviewed and created by them on the system. It evidence of unlawful activity is discovered, including unauthorized access attempts, it may be reported to ave enforcement officials.	

**STEP 3** Check the box to indicate that you understand, if you file, you must comply with the redaction rules and have read the important notice of redaction responsibility. Click **Continue**:

* Required Information
Redaction Agreement
 IMPORTANT NOTICE OF REDACTION RESPONSIBILITY: All filers must redact; Social Security or taxpayer- identification numbers; dates of birth; names of minor children; financial account numbers; and in criminal cases, home addresses in compliance with Fed. R. App. P. 25(a)(5), Fed. R. Griv, P. 5.2, Fed. R. Crim, P. 49.1, or Fed. R. Bankr, P. 9037, This requirement applies to all documents, including attachments.
Continue Cancel

**STEP 4** Choose the court by clicking the drop-down list "Where would you like to go?" and click **Submit**:

Please choose a court.         Client Code         Court       Where would you like to go?		s John Trustee	l in as J	Logged i
Client Code Court Where would you like to go?		court.	ose a coi	Please choos
Court Where would you like to go?				Client Code
· · · · · · · · · · · · · · · · · · ·	o?	Where would you like to go?		Court
Submit		Submit		
Not John Trustee?		?	ustee?	Not John Trus
Click here to log in as a different user.		a different user.	og in as a e	Click here to log

# STEP 5 Click Utilities, and then click the Maintain Your ECF Account link under Your Account:

	Adversary 🗸	Query	Reports 🗸	Utilities -	Search	Help	Log Out
Utilities							
Your Account	Misce	llaneous				Local A	Apps
Internet Payments Due	eFin	<u>iCert</u>				Acce	ss Bankrupt
Internet Payment History	Mai	lings					-
NEF Summary Report	Doc	ket Using X	ML Form	<u>s Data</u>			
Maintain Your ECF Account	Ope	n Bankrupt	cy Case Us	ing XML Fo	orms Data		
Link a CM/ECF account to my PACER	account			_			
Maintain Your Login/Password	Admi	nistrative I	Ienu				
Your PACER Account	Veri	fy a Docum	<u>ent</u>				
<u>Change My Role</u>	Che	ck PDF Do	<u>cument</u>				
Change PACER Exemption Status	Judg	ement Index					
View Your Transaction Log							
Court Information							

#### STEP 6 Click Email information:

Last name	Neibel-Atty	First name Courtney	
Middle name		Generation	
Title		Type aty	
Office	Neibel Law Firm Test	Add Headers to PDF Documents	
Address 1	123 Any Street		
Address 2			
Address 3			
City	Savannah	State GA	
Country	USA	County	$\sim$
Phone	555-555-3232	Fax	
Alternate Phone		Text Phone	
Bar ID		Bar status	Mail
Initials		<b>DOB</b> 01/01/1999	AC
Person end date			

STEP 7 Enter the Filing Agent's email address in both boxes for Secondary email address. Check the appropriate box(es) for Send the notices specified below. Click Return to Account screen:

Email information for Courtney Neibel-Atty	
Primary email address cpittman23@yahoo.com	Update my primary email address
Secondary email address courtney_neibel@gas.uscourts.gov	Reenter secondary email address courtney_neibel@gas.uscourts.gov
Z Enable confirmation of Free Look Use to verify your <b>one free loo</b>	$\mathbf{k}$ will be used when a document link is clicked from CM/ECF emails (NEFs).
Send the notices specified below	
to my primary email address	
to the secondary addresses	
Send notices in cases in which I am involved	
Send notices in these additional cases	
Send notices for adversary proceedings in which I am directly	/ involved and for their related bankruptcy cases
$ \odot $ Send notices for adversary proceedings in which I am directly	involved but not for their related bankruptcy cases
You may receive notices for some bankruptcy cases if it is require	d by the Clerk of Court.
Send a notice for each filing	
<ul> <li>Send a notice for each filing</li> <li>Send a Daily Summary Report</li> </ul>	
Send a notice for each nung     Send a Daily Summary Report Format notices      HTML	

STEP 8

#### Click Submit to complete the process:

Last name	Neibel-Atty	First name Courtney	
Middle name		Generation	
Title		Type aty	
Office	Neibel Law Firm Test	Add Headers to PDF Documents	
Address 1	123 Any Street		
Address 2			
Address 3			
City	Savannah	State GA	
Country	USA	County ~	
Phone	555-555-3232	Fax	
Alternate Phone		Text Phone	
Bar ID		Bar status	Mail
Initials		<b>DOB</b> 01/01/1999	AC
Person end date			
Email information	More user information		