

Attorneys and trustees can now create special logins for employees who file on behalf of them in CM/ECF. These records are for filing agents and 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.

The creation or editing of a filing agent record is accomplished through an attorney or trustee’s person record in the Maintain User Accounts utility.

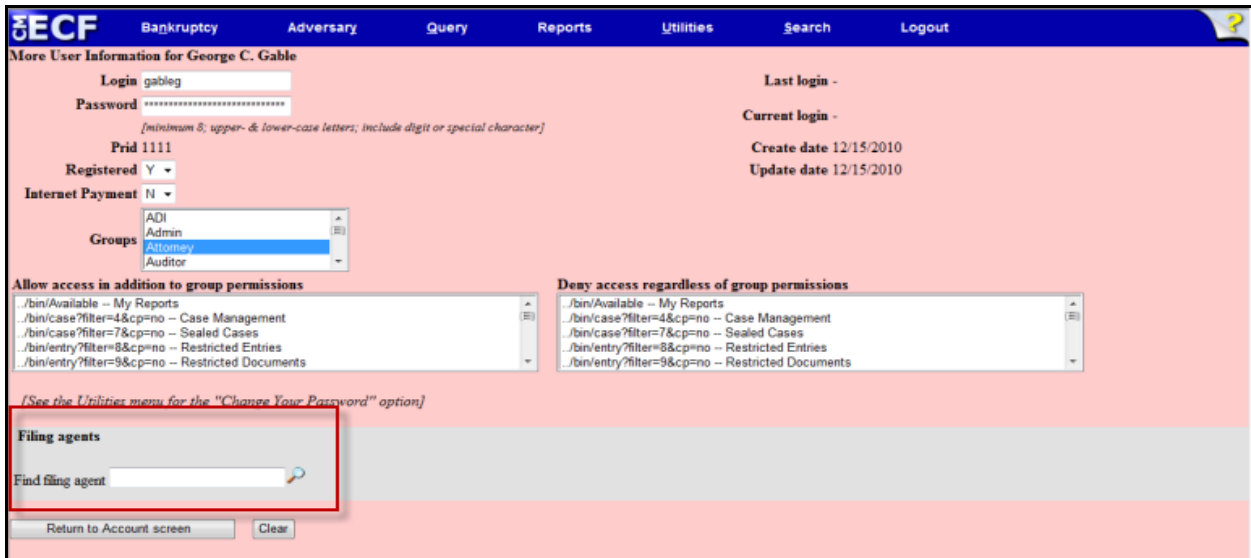
Only the attorneys’ or trustees’ names will appear on the docket report, queries and other case management reports. The filing agents’ name will never appear to the public.

Filing agents have the same access permissions as the attorney or trustee for whom the agent is docketing.

NOTE: *The filing agent may receive e-mail, but only if the attorney or trustee places the filing agent’s e-mail address in the “Send notices to these additional addresses” section of the attorney or trustee’s e-mail record.*

Creating a Filing Agent Record

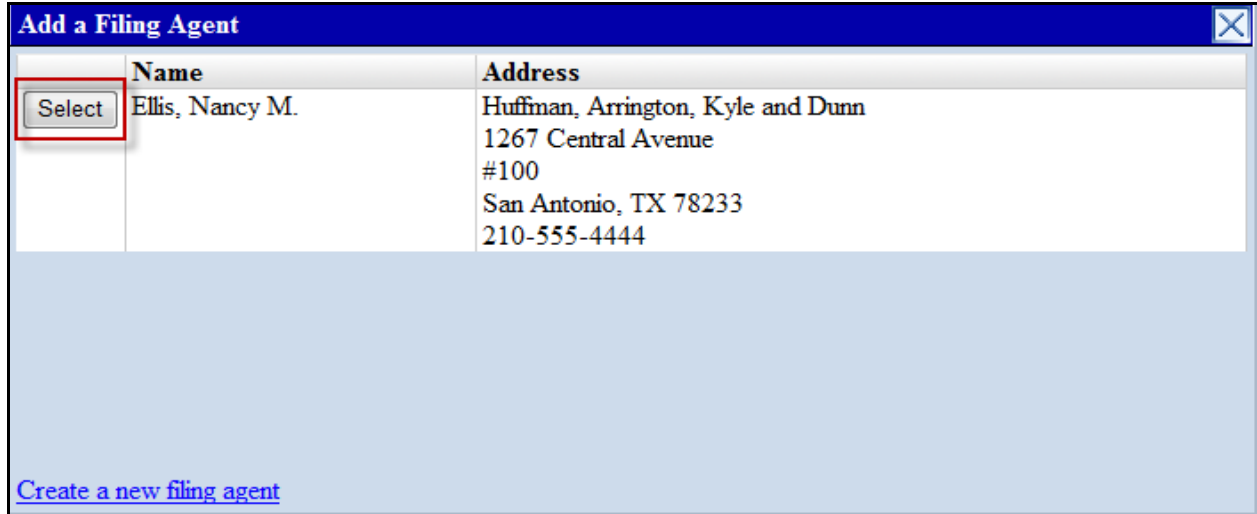
To associate a filing agent with this attorney, search for the agent by entering the last name in the “Find filing agent box” and then click the search icon.



This search generates a panel listing all filing agents that matched your search criteria.

NOTE: *For attorneys and trustees who have staff with accounts already in ECF, changes will have to be*

made to these individual staff accounts before they can be associated as filing agents. Please email the Court at usbc_cmecf_ProjectManager@gas.uscourts.gov with the user names you want to make filing agents. The court will make the requested change to the individual staff accounts. You will be notified by return email when this has been completed, and then you may continue with the step noted above to associate them to your account.



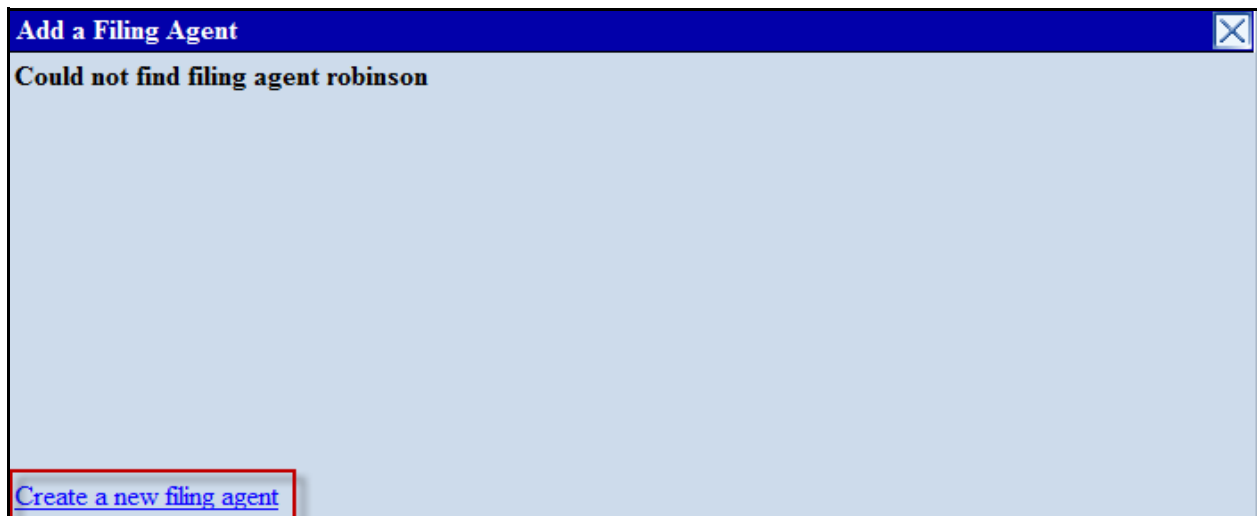
The screenshot shows a window titled "Add a Filing Agent" with a close button in the top right corner. Below the title bar is a table with two columns: "Name" and "Address". The table contains one row with the following data:

Name	Address
Ellis, Nancy M.	Huffman, Arrington, Kyle and Dunn 1267 Central Avenue #100 San Antonio, TX 78233 210-555-4444

To the left of the table, there is a "Select" button, which is highlighted with a red rectangular box. At the bottom of the window, there is a blue hyperlink that reads "Create a new filing agent".

Once the correct filing agent is found, click the "Select" button on this screen to associate this agent with this attorney.

If the filing agent you wish to add does not appear on the list, the following screen will appear.



The screenshot shows a window titled "Add a Filing Agent" with a close button in the top right corner. The main content area of the window displays the message "Could not find filing agent robinson". At the bottom of the window, there is a blue hyperlink that reads "Create a new filing agent", which is highlighted with a red rectangular box.

Click the "Create a new filing agent" hyperlink at the bottom of this results list.

A login and password is created here for the filing agent. Any additional information that your court requires may also be entered at this time.

Filing Agent Information

Login
Password
[minimum 8; upper- & lower-case letters; include digit or special character]

Last name First name
Middle name Generation
Title
Office
Address 1
Address 2
Address 3
City State Zip
Country Country
Phone Fax
SSN / ITIN DOB

Once the information screen is completed, it must be submitted to the database. Remember that a filing agent is filing on behalf of an attorney or trustee and they are linked to that attorney or trustee person record. It is very important to take all the necessary steps to save this record on each subsequent screen.

Filing Agent Email Setup

To enable the filing agent to receive notices of electronic filing, they must be set up in the attorney or trustee's email preferences as a secondary address. The secondary email information screen will allow multiple email addresses, separated by commas or semi-colons.

Email information for George C. Gable

Primary email address Reenter primary email address
Secondary email address Reenter secondary email address

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
- 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 required by the Clerk of Court.
- Send a notice for each filing
- Send a Daily Summary Report

The More User Information screen for the attorney George C. Gable now shows he has one filing agent, James P. Robinson. The name [Robinson, James P.](#) is a hyperlink to the Filing Agent Information screen.

ECF Bankruptcy Adversary Query Reports Utilities Search Logout

More User Information for George C. Gable

Login Last login -

Password Current login -

[minimum 8; upper- & lower-case letters; include digit or special character]

PrId 1111 Create date 12/15/2010

Registered Y Update date 12/16/2010

Internet Payment N

Groups

Allow access in addition to group permissions

- ../bin/Available -- My Reports
- ../bin/case?filter=4&cp=no -- Case Management
- ../bin/case?filter=7&cp=no -- Sealed Cases
- ../bin/entry?filter=8&cp=no -- Restricted Entries
- ../bin/entry?filter=9&cp=no -- Restricted Documents

Deny access regardless of group permissions

- ../bin/Available -- My Reports
- ../bin/case?filter=4&cp=no -- Case Management
- ../bin/case?filter=7&cp=no -- Sealed Cases
- ../bin/entry?filter=8&cp=no -- Restricted Entries
- ../bin/entry?filter=9&cp=no -- Restricted Documents

[See the Utilities menu for the "Change Your Password" option]

Filing agents

Uncheck the box to remove a filing agent.

[Robinson, James P.](#) Huffman, Arrington, Kyle and Dunn, 1267 Central Avenue, #100, San Antonio, TX 78233, 210-555-4444]

Find filing agent

Editing a Filing Agent Record and Setting Permissions

Updates to this account can be done on the Filing Agent Information screen. To check or update the permissions of this filing agent, click the "Update permissions" button.

Filing Agent Information

Login robinsonj	Last login -
Password ***** <small>[minimum 8; upper- & lower-case letters; include digit or special character]</small>	Current login -
Prid 1112	Create date 12/16/2010

Last name Robinson	First name James
Middle name P.	Generation
Title Administrative Clerk	
Office Huffman, Arrington, Kyle and Dunn	
Address 1 1267 Central Avenue	
Address 2 #100	
Address 3	
City San Antonio	State TX Zip 78233
Country	County BEXAR-TX (48029)
Phone 210-555-4444	Fax
SSN / ITIN	DOB

The Internet Payment selection may be changed from (N)o to (Y)es here if the attorney participates in the Internet Payment program.

Filing Agent Permissions: James P. Robinson filing for George C. Gable

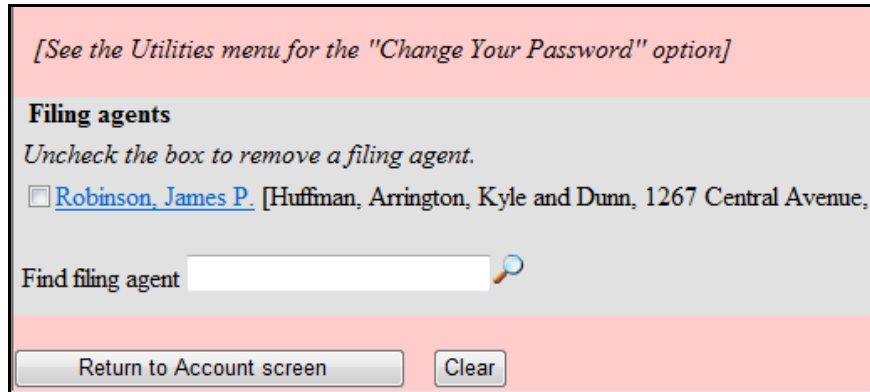
Internet Payment N
Groups Attorney E-Orders Attorney

Access permissions for filing agents are determined and maintained by the court or by the associated attorney or trustee. The filing agent cannot maintain his or her own access permissions.

In the Groups window, only groups to which the attorney or trustee belong will appear and therefore, only these permission groups may be granted to the agent.

Deactivating a Filing Agent


When there are personnel changes at the law firm, filing agents should be deactivated from their respective filer. On the More User Information screen for the attorney remove the check box next to the filing agent's name on the attorney's person record.



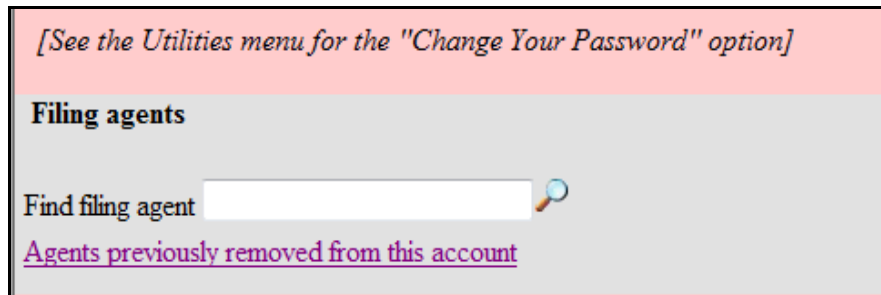
[See the Utilities menu for the "Change Your Password" option]

Filing agents
Uncheck the box to remove a filing agent.

[Robinson, James P.](#) [Huffman, Arrington, Kyle and Dunn, 1267 Central Avenue,


Find filing agent 

This does not delete the filing agent from the database. Only the association between this filing agent and attorney are removed. The filing agent is still available to be associated with this account or to another attorney or trustee.



[See the Utilities menu for the "Change Your Password" option]

Filing agents

Find filing agent 

[Agents previously removed from this account](#)

Clicking on the hyperlink on this screen, will display any filing agents that have been previously removed from this attorney or trustee account.