

Filing Agents

Last Updated: June 2011

Prior to release 4.0 of CM/ECF, it was necessary for some trustees and attorneys to have multiple paralegals/staff members docketing simultaneously in order to complete necessary filings. Previously, there was no way to link multiple accounts to the same trustee or attorney. As a result the court had to create separate (^carat) accounts to allow staff to file on behalf of the trustee/attorney.

Now, a new user type is available, called 'Filing Agent'. A trustee or attorney may link several 'Filing Agents' to their user account so that when the agent files on behalf of the trustee/attorney, the docket text shows the trustee's/attorney's name as the filer.

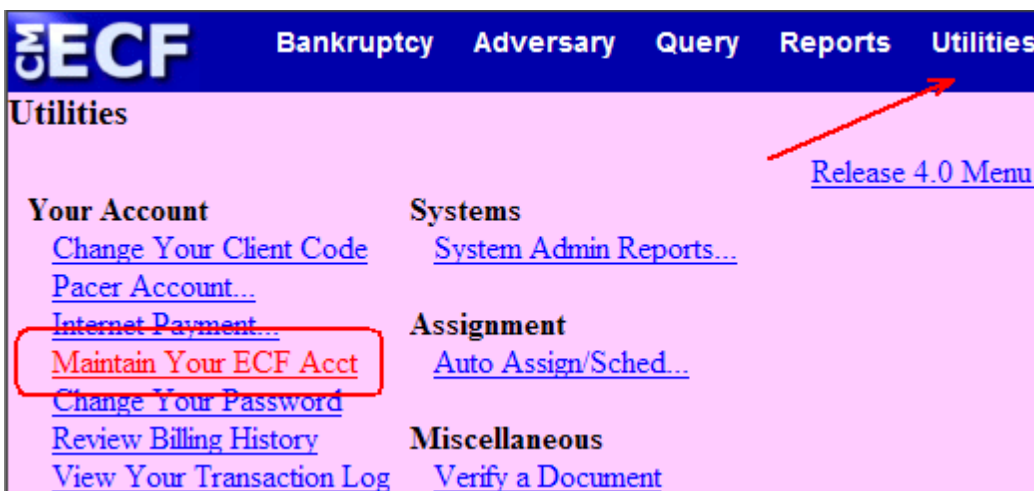
Filing Agents -

- Can docket on behalf of the trustee/attorney
- Will not appear on the pick list for docketing (only the trustee or attorney name will show)
- Name will not show on the docket text. (the trustee or attorney name will show as the filer)
- Assume the rights and privileges assigned to the trustee or attorney's user account
- Will not receive email on their own. The Filing Agent's email address must be designated through the trustee or attorney's account in Maintain Your ECF Account: 'Secondary Email Address' and by checking 'Send the notices to the secondary addresses'
- Can docket restricted (SSN Verification Page, Writs) and sealed documents but cannot view them after docketing (the attorney/trustee main account must be used)

Adding Filing Agents

The attorney or trustee must login.

Click '**Utilities**' – '**Maintain Your ECF Account**'



The screenshot shows the ECF (Electronic Case Filing) interface. At the top, there is a navigation bar with the following items: Bankruptcy, Adversary, Query, Reports, and Utilities. The Utilities menu is expanded, showing a list of options. A red box highlights the option 'Maintain Your ECF Acct'. A red arrow points to the Utilities menu item in the top navigation bar. The options listed under Utilities are:

- Your Account**
 - [Change Your Client Code](#)
 - [Pacer Account...](#)
 - [Internet Payment...](#)
 - [Maintain Your ECF Acct](#)
 - [Change Your Password](#)
 - [Review Billing History](#)
 - [View Your Transaction Log](#)
- Systems**
 - [System Admin Reports...](#)
- Assignment**
 - [Auto Assign/Sched...](#)
- Miscellaneous**
 - [Verify a Document](#)

There is also a link for [Release 4.0 Menu](#) in the top right corner of the Utilities menu.

Click 'More user information...'

Maintain User Account

Last name	Spencer Grigsby	First name	Nancy
Middle name (Gblt)		Generation	
Title	<input type="text" value="Trustee"/>	Type	tr
Office	<input type="text"/>		
Address 1	<input type="text" value="4201 Mitchellville Rd. Ste 401"/>		
Address 2	<input type="text"/>		
Address 3	<input type="text"/>		
City	<input type="text" value="Bowie"/>	State	<input type="text" value="MD"/>
		Zip	<input type="text" value="20716"/>
Country	<input type="text" value="USA"/>	County	<input type="text" value="PRINCE GEORGE'S-MD"/>
Phone	<input type="text" value="(301) 805-4700"/>	Fax	<input type="text"/>
SSN / ITIN	<input type="text"/>	Tax ID / EIN	<input type="text"/>
Bar ID	grign	Bar status	
Initials		DOB	
Mail group		AO code	grin
		Person end date	


Type the last name of the person you wish to add as the Filing Agent.
Click the **magnifying glass**.

More User Information for Nancy (Gblt) Spencer

Login	ngrigsby	Current log	
Registered	Y	Create da	
Internet Payment	Y	Update da	
Groups	Trustee/US Trustee	Last log	

[See the Utilities menu for the "Change Your Pas

Filing agents

Find filing agent 

A new window will pop-up stating that the Filing Agent could not be found.

Add a filing agent

Could not find filing agent White

Click 'Create a new filing agent'.

[Create a new filing agent](#)

Complete the 'Filing Agent Information'- Please fill in the name, address, phone number, login and password. Click **Submit**

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

County

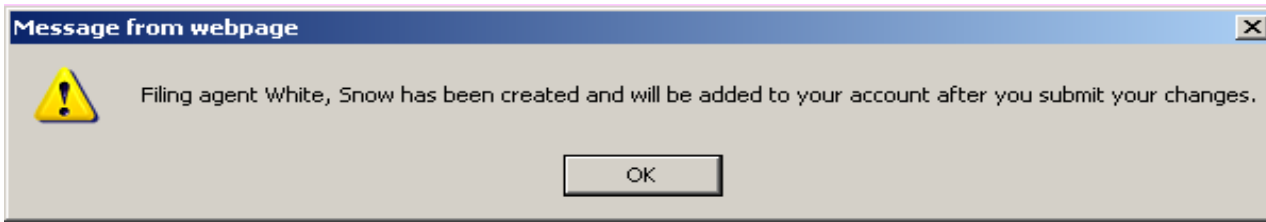
Phone

Fax

SSN / ITIN

DOB

A message will appear confirming the creation of the new Filing Agent. Click **OK**



The Filing Agent will now show in a listing under 'Filing Agents'. The Filing Agent can be deactivated at any time by the Trustee/Attorney by checking the box next to the Filing Agent's name.



To finish adding the Filing Agent - Click **Return to Account Screen**

Click **Submit**

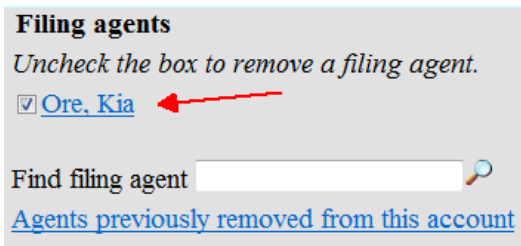
Click **Submit**

Updating Filing Agent Permissions – Internet Payments

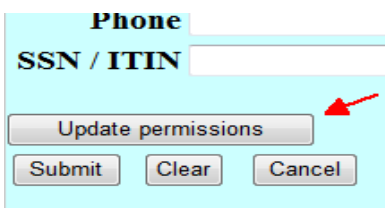
To allow your Filing Agent to pay internet payments –

Click **Utilities > Maintain Your ECF Account > More User Information**

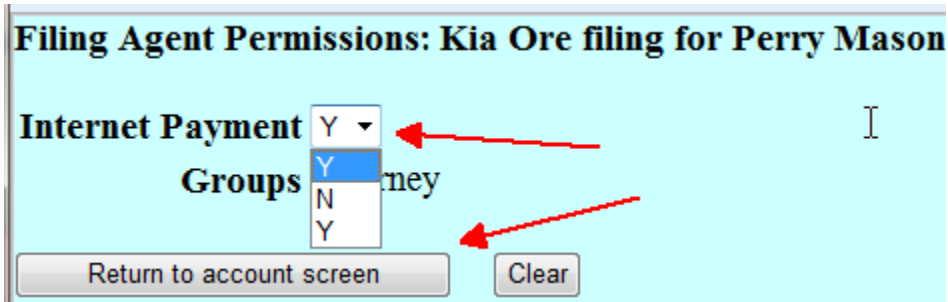
Click on the Name of the Filing Agent



Click **Update Permissions**



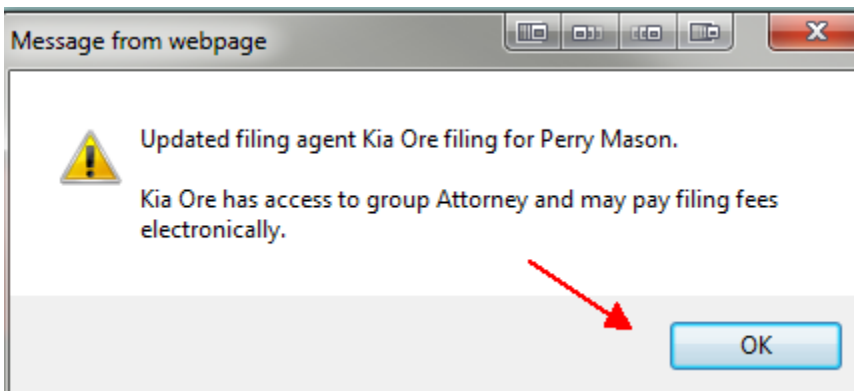
Click the Internet Payment dropdown and select 'Y'. Click **Return to Account Screen**.



Click **Submit**



The following message will appear. Click **OK**



Click **Return to Account screen** > **Submit** > **Submit**

Selecting an existing Filing Agent

Click 'Utilities' – 'Maintain Your ECF Account' – 'More User Information'

Type the last name of the agent you wish to find and click the magnifying glass


Click **Select**

Click **Return to Account Screen**

Click **Submit**

Click **Submit**

Filing agents

Find filing agent 

[Return to Account screen](#) [Clear](#)

Add a filing agent

	Name	Address
Select	White, Snow	Nancy 4201 N Bowie, 301-80

Docketing as a Filing Agent

Login with your login and password.

Authentication

Login:

Password:

Client code:

I understand that, if I file, I must comply with the requirements of [Bankr. P. 9037](#). This requirement applies to all filers.

[Login](#)

IMPORTANT NOTICE OF REDACTION
 identification numbers; dates of birth; names of individuals; and other identifying information. This requirement applies to all filers.

If you are a filing agent for more than one attorney or trustee – select the attorney/trustee you are filing on behalf of.

Filing for

Perry Mason (aty)
 Nancy (Gblt) Spencer Grigsby (tr)

****IMPORTANT****

CM/ECF will show who you are filing on behalf of. To change who you are filing on behalf of click **Change user**. (The **Filing for** shown in the image above will then appear.)

ECF Bankruptcy Adversary Query Reports

Filing for Nancy (Gblt) Spencer Grigsby (tr)  [Change user](#)

Docket as normal.

Reviewing Your Transaction Log

CM/ECF allows you to view a log of all transactions. The transaction log will show the id (individual doing the docketing), date/time, case number and docket text.

Click **Utilities** – **View Your Transaction Log**



ECF Bankruptcy Adversary Query Reports Utilities

Utilities

Your Account

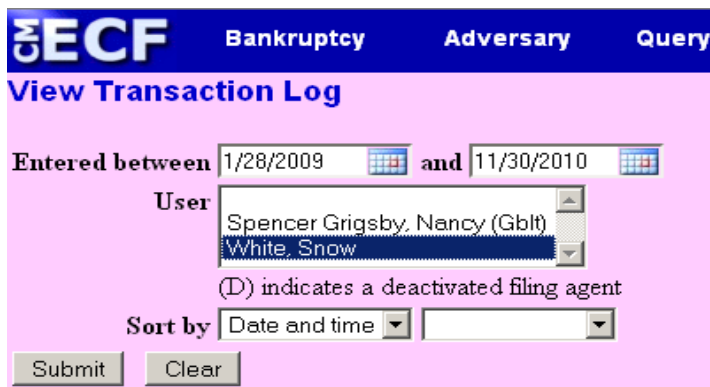
- [CMECF Login](#)
- [Change Your Client Code](#)
- [Pacer Account...](#)
- [Internet Payment...](#)
- [Maintain Your ECF Acct](#)
- [Change Your Password](#)
- [Review Billing History](#)
- [View Your Transaction Log](#)

Miscellaneous

- [Verify a Document](#)
- [Court Information](#)
- [Mailings...](#)

Select the Enter Between dates, the User and Sort by options. Click **Submit** (Nancy's login will show herself and all filing agents. Each Filing Agent can only view their own transactions).

Nancy's Login



ECF Bankruptcy Adversary Query

View Transaction Log

Entered between 1/28/2009 and 11/30/2010

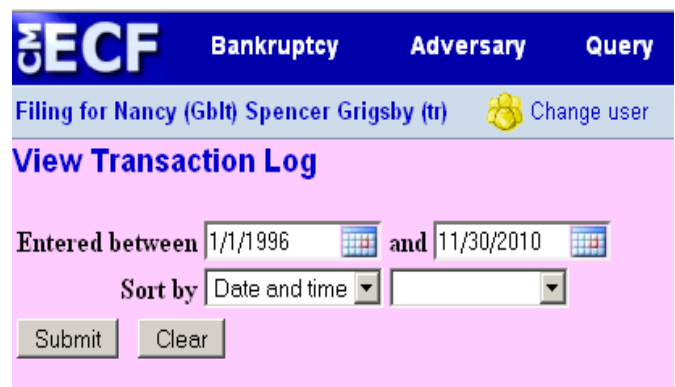
User: Spencer Grigsby, Nancy (Gblt)
White, Snow

(D) indicates a deactivated filing agent

Sort by: Date and time

Submit Clear

Filing Agent's Login



ECF Bankruptcy Adversary Query

Filing for Nancy (Gblt) Spencer Grigsby (tr) Change user

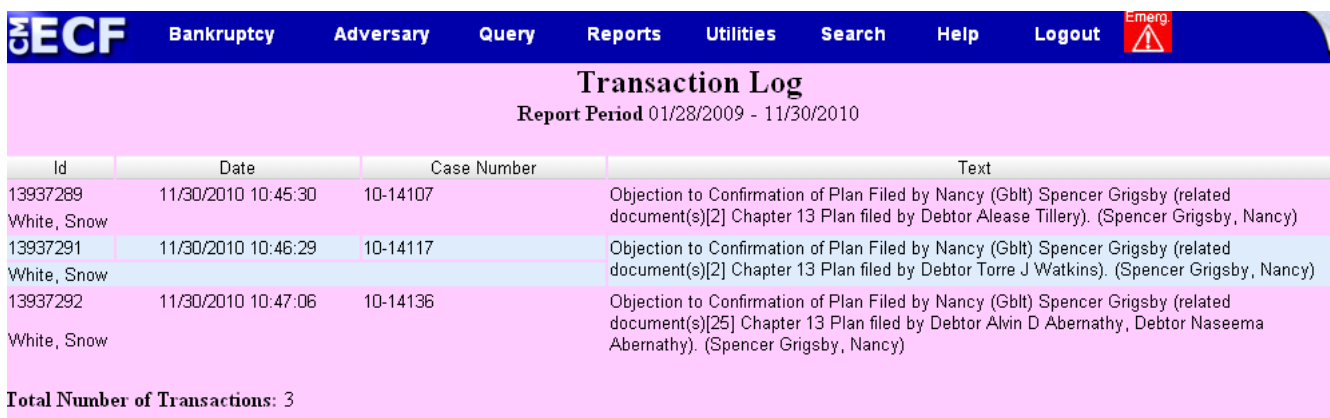
View Transaction Log

Entered between 1/1/1996 and 11/30/2010

Sort by: Date and time

Submit Clear

Results from Nancy's Login for Snow White



ECF Bankruptcy Adversary Query Reports Utilities Search Help Logout **Emerg**

Transaction Log
Report Period 01/28/2009 - 11/30/2010

Id	Date	Case Number	Text
13937289 White, Snow	11/30/2010 10:45:30	10-14107	Objection to Confirmation of Plan Filed by Nancy (Gblt) Spencer Grigsby (related document(s)[2] Chapter 13 Plan filed by Debtor Alease Tillery). (Spencer Grigsby, Nancy)
13937291 White, Snow	11/30/2010 10:46:29	10-14117	Objection to Confirmation of Plan Filed by Nancy (Gblt) Spencer Grigsby (related document(s)[2] Chapter 13 Plan filed by Debtor Torre J Watkins). (Spencer Grigsby, Nancy)
13937292 White, Snow	11/30/2010 10:47:06	10-14136	Objection to Confirmation of Plan Filed by Nancy (Gblt) Spencer Grigsby (related document(s)[25] Chapter 13 Plan filed by Debtor Alvin D Abernathy, Debtor Naseema Abernathy). (Spencer Grigsby, Nancy)

Total Number of Transactions: 3