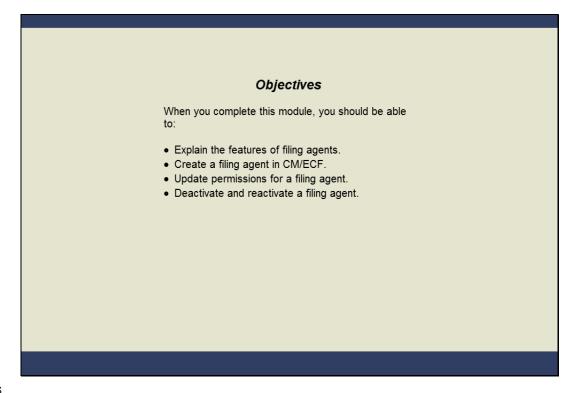
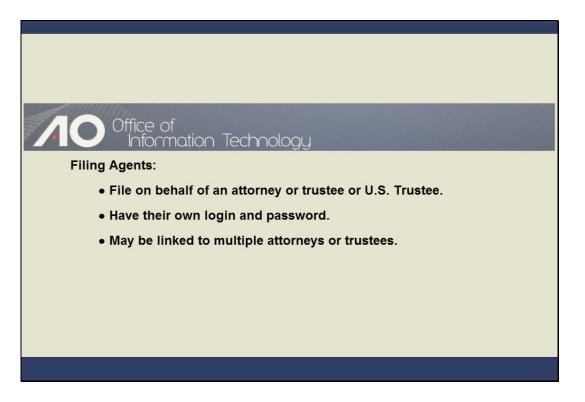


WELCOME Slide notes:



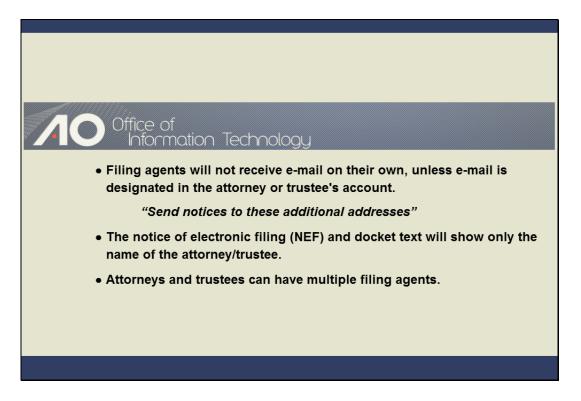
OBJECTIVES

Slide notes: When you complete this module, you should be able to explain the purpose and capabilities of filing agents. You'll see how to create and update permissions for a filing agent from the attorneys or trustee's account. You will also be able to deactivate as well as reactivate a filing agent's account.



Slide notes: The filing agent user was created to assist attorneys, trustees, and the U.S. Trustee with input into the CM/ECF system. The agent files on behalf of someone else, but uses his or her own login and password.

Filing agents are not standard user types and their names will not appear on the docket report. As we will see in this module, a filing agent may be linked to multiple attorneys and trustees.



Slide notes: If you want a filing agent to receive e-mail at their own e-mail address, the filing agent's e-mail address must be placed in the "Send notices to these additional addresses" section of your attorney or trustee person record.

When a pleading is filed in CM/ECF, the notice of electronic filing, or NEF, and docket text will show your name as the attorney or trustee. Finally, an attorney or trustee may have multiple filing agents.



CREATING A FILING AGENT Slide notes:



Slide notes: Some courts will allow you, as an attorney or trustee, to create and edit filing agents. The following sections of this module will demonstrate the steps to do this when logged into CM/ECF as the attorney, Norman Drew.

The creation or editing of a filing agent record is accomplished in an attorney or trustee's person record. I'll now demonstrate creating a filing agent within your CM/ECF account. From the main menu, I will...



Slide 7 Slide notes: ...click Utilities.

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Slide notes: The selections on the Utilities screen at your court may differ from the ones shown here. The attorney or trustee record will be found under the "Maintain Your ECF Account" hyperlink.

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Slide notes: Next, I'll click "More user information," which is where filing agent records are maintained.

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Slide notes: To associate a filing agent with this account, I will first enter the last name of the filing agent in the "Find filing agent" field and then click the search icon to determine if an agent has already been associated with my account.

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Slide notes: This search generates a window listing all filing agents that matched your search criteria. Since my search did not locate a record, I click the "Create a new filing agent" hyperlink at the bottom of the results list.

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Slide notes: The Filing Agent Information screen opens. I must first create a login and password for this agent. The login and password must conform to your court's standards.

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Slide 14 Slide notes:

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Slide notes: Remember that a change is being made to your person record and it is very important to take all of the steps necessary to save this record. Any additional information can be added to this record later. To begin the process of submitting and saving this record, I'll move to the bottom of this screen...

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Slide 18 Slide notes: ...and click SUBMIT.

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Slide 19 Slide notes:

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Slide notes: An information window opens, confirming the creation of the filing agent. I'll click OK to continue the steps necessary to add this filing agent to my account.

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Slide notes: Now, I continue saving this change to my attorney record by clicking "Return to Account screen."

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Slide 22 Slide notes:

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Slide 23 Slide notes: Next, I'll click Submit.

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	continue with update of pers	ion					
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Slide notes: This screen represents the final step in the save process and must be completed to ensure that my attorney person record has been updated. I'll click Submit...

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Slide 26 Slide notes:

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Slide notes: ...and the linking of the filing agent to my attorney record is complete.



SETTING FILING AGENT PERMISSIONS Slide notes:

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Slide notes: Your court may also allow attorneys or trustees to set or modify filing agent permissions. To edit the newly created filing agent record, I'll first click "More user information."

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Slide 30 Slide notes:

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Slide notes: Notice that the newly created filing agent's name is now a hyperlink to the filing agent's record. Clicking the name...

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Slide 32 Slide notes:

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Update per	missions									

Slide notes: ...opens the Filing Agent Information screen. Next, I'll click Update permissions.

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Slide 34 Slide notes:

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Internet Payment N 👻								
Groups Attorney E-Orders Attorney ParaLegal1								
Return to account screen Clear								

Slide notes: 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 permission groups to which an Attorney or trustee belong will appear and therefore, only these permission groups can be granted to the agent.

The Internet Payment selection may be changed from No to Yes here if you, as the attorney, participate in the Internet Payment program. The attorney or trustee cannot grant additional access to the agent.

As I stated before, most of the time, attorneys and trustees will allow their filing agents the same permissions as they have. If no change is made to this screen, this filing agent would be granted all permissions of the Attorney, E-Orders Attorney and ParaLegal1 groups.

Courts could, however, create different user groups to grant less access to filing agents at the attorney or trustee's request. The ParaLegal1 group appearing on this screen is such a group. To show this functionality, I'll grant this filing agent only the permissions of the ParaLegal1 group by selecting it from the list of groups.

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Filing Agent Permissions: Susan C. Johnston filing for Norman H. Drew	
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Return to account screen Clear	

Slide notes: Next, I'll return to the filing agent account screen...

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Slide 37 Slide notes:

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Title	Para Legal							
Office	Rodman & Associates, LLC							
Address 1	8534 North Jefferson Avenue							
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City	San Antonio		State	TX Zi	ip 78233			
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Phone	210-334-2225		Fax					
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Update per	missions							

Slide notes: ...and now I must save the change to my attorney record. Remember, filing agent permissions reside in the attorney or trustee's account record.

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Slide 40 Slide notes: ...and click Submit.

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Title Para Legal		
Office Rodman & Associates, LLC		
Address 1 8534 North Jefferson Avenue		
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Slide 41 Slide notes:

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Slide notes: An information window appears, detailing the permission change that will be made to this record once it is saved. I'll click OK to continue...

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Slide notes: ...and then click "Return to Account screen."

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Slide notes: At the Maintain User Account screen for the attorney, I'll click Submit.

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Slide 46 Slide notes:

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Slide notes: Again, as the final step, I'll click Submit on this screen.

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Slide 48 Slide notes:

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Slide notes: The update to the attorney record is now complete.



DEACTIVATING A FILING AGENT Slide notes:

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Last name	Drew	F	irst name Norman				
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Office	Rodman & Associates, LLC	;	🗹 Add Headers to	PDF Docume	ents		
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Slide notes: When there are personnel changes, it may be necessary for a filing agent to be deactivated from their respective filer. To do that, I'll first click "More user information."

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Slide 52 Slide notes:

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Slide notes: To deactivate this filing agent, select the Deactivate check box.

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Slide notes: When the change is saved, the association record between the filing agent and the attorney is deactivated. Although the agent is no longer associated with the filer, he or she can be re-associated easily. I'll continue the deactivation of Susan C. Johnston by saving the change using the process previously described, and then demonstrate how to re-associate the agent.

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Slide 55 Slide notes:

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Slide 60 Slide notes:

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Slide notes: Next, I'll again click "More user information."

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Slide 62 Slide notes:

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REACTIVATING A FILING AGENT

Slide notes: As you can see, this attorney has no filing agent associated with this record. To re-associate an inactive filing agent, I'll first click the "Inactive filing agents" hyperlink.

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Slide notes: The "Reactivate a filing agent" window shows any filing agent previously associated with this attorney, but who is currently deactivated. To reactivate this agent, I'll click Select next to the agent's name.

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Slide notes: Susan Johnston is once again set up as an active filing agent for the attorney, Norman Drew. Again, I must take the steps necessary to save this change.

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Slide notes: The attorney record has once again been updated.



FILING AGENT WITH MULTIPLE ATTORNEYS Slide notes:

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Filing for Norman H. Drew (aty) Charles J. Rodman (aty)			

Slide notes: If a filing agent has been linked to two or more attorneys, the first screen that appears after the agent logs in requires the agent to select the attorney for whom he or she is filing. Watch what happens when the attorney, Norman Drew, is selected.



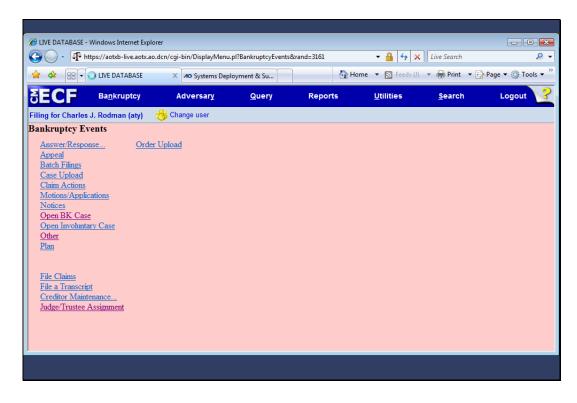
Slide notes: The name of the attorney or trustee displays on every screen for filing agents. Also notice the Change user icon. This icon only appears for a filing agent linked to multiple attorneys or trustees and will not appear if the agent is linked to only a single attorney or trustee. When clicked, the icon enables the agent to select a different attorney without logging out of CM/ECF. I'll now click Bankruptcy from the main menu.

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Bankruptcy Ev	ents						
Motions/Applic Open BK Case							

Slide notes: Notice that for this attorney, limited permissions have been granted to the filing agent. The agent is only able to file motions and applications, and to open a bankruptcy case. When I click Change user...

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Slide notes: ...the system returns me to the attorney selection menu where I'll now select the attorney, Charles Rodman.



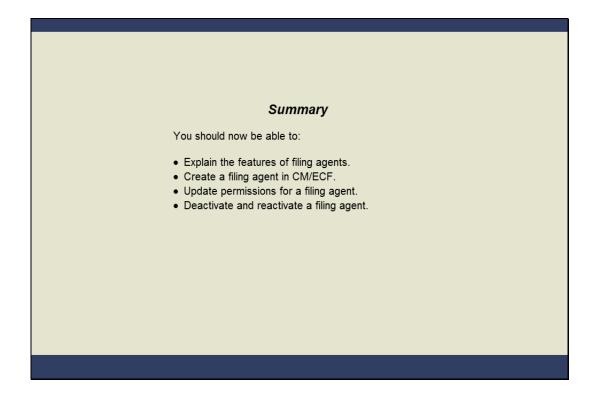
Slide notes: Now when I select the Bankruptcy main menu, notice that for this attorney, the filing agent permissions are different. Remember, these permissions come from the groups that the attorney is a member of.

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Filing for			
Joyce P. Henderson (aty) Charles J. Rodman (aty) Charles J. Rodman (tr)			

Slide notes: An attorney may also conduct business as a trustee. This screen shows an individual, Charles J. Rodman, who is both an attorney and a trustee. A filing agent has been given the permissions to file for Charles J. Rodman in either capacity. Note that the filing agent has specific permissions for each attorney or trustee for whom he or she is working.

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Filing for C	Charles J. Rodman (aty)	👸 Change user							
Transaction Log Report Period 07/29/2010 - 07/29/2010									
ld	Date	Case Number		Text					
31795	07/29/2010 11:37:16	10-10130	Opened New BK Case 10						
31799	07/29/2010 11:40:01	10-10130	Motion to Avoid Lien with First Westside Bank Filed by Charles J. Rodman on behalf of Joint Debtor Annette R. Carrigan, Debtor Jerry L. Carrigan (Rodman, Charles)						
31801	07/29/2010 11:49:18	10-10131	Opened New BK Case 10-10131						
31804	07/29/2010 11:50:21	10-10131	First Motion to Avoid Lien on Household Goods under Section 522(f)(1)(B)(i) Filed by Charles J. Rodman on behalf of Debtor Harry J. McPherson (Rodman, Charles)						
Total Num	ber of Transactions: 4								

Slide notes: Most filing agents can run their own transaction log. It will appear like this screen. However, just like the docket report, only the attorney or trustee will be listed as the filer. Nor will the filing agent's activity appear in Query if one searches by the agent's name.



SUMMARY

Slide notes: You should now be able to explain the purpose and capabilities of filing agents. You've seen how to create and update permissions for a filing agent from the attorneys or trustee's account. You should also be able to deactivate as well as reactivate a filing agent's account.