

Maintain Filing Agent

I. ACCESSING FILING AGENT TOOL

1. Select Utilities > *Maintain Your ECF Account* if not already in Maintain Your User Account Menu
2. Select the *More User Information* button
3. Type in the name of your Filing Agent [employee]
4. Click the magnifying glass to search
5. If the Add a Filing Agent screen displays with a message “Could not find filing Agent.” continue to step II below to add a Filing Agent to your account.

II. ADD FILING AGENT

1. Filing Agent not in the system:
 - a. Select “Create a new Filing Agent” from the Add a Filing Agent screen to add your Filing Agent to your account.

The screenshot shows the ECF system interface. At the top, there is a navigation bar with links: Bankruptcy, Adversary, Query, Reports, Utilities, Manual, Search, and Logout. Below this, the user information for 'Tester Attorney-Presley' is displayed, including login details, registration status, and internet payment information. A search for 'Matthews' is shown in the 'Find filing agent' field, with a magnifying glass icon. A dialog box titled 'Add a Filing Agent' is open, displaying the message 'Could not find filing agent Matthews' and a button labeled 'Create a new filing agent'.

- b. The Filing Agent Information screen displays a blank Login field and a pre-populated Password field (this field can be customized to your needs).

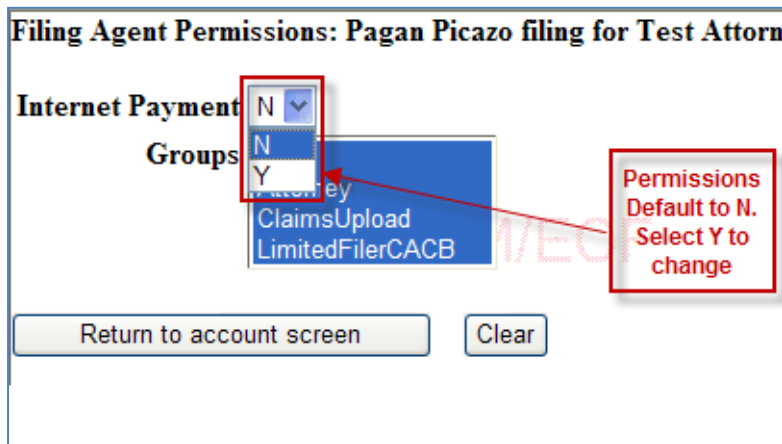
The screenshot shows the 'Filing Agent Information' form. The 'Login' field is blank, and the 'Password' field is pre-populated with 'w2Pu!Oah'. Below the password field, there is a note: '[minimum 8; upper- & lower-case letters; include digit or special character]'. Other fields include 'Last name' (Picazo), 'First name' (Pagan), 'Middle name', 'Title', 'Office', and 'Address 1'.

- c. Create a Login for your Filing Agent.
- d. Although a password will automatically display in the password field, this information can also be changed to create your own password. Your password must consist of upper and lower-case letters and at least 1 digit or special character.
- e. Include the Filing Agent's business address and phone number as a means to further identify the Filing Agent. You may also elect to include other identifiers.
- f. Make sure to annotate the login/password information before submitting your transaction.
- g. Click **Submit**. A confirmation message will displayed. (*The Filing Agent has been added to your account.*) Click OK. Note that a check mark now displays next to the newly created Filing Agent's name.
- h. Proceed to Step III to update the new agent's permission rights.

III. UPDATING PERMISSION RIGHTS TO ALLOW A FILING AGENT TO PAY FILING FEES

Once the Filing Agent has been added to the account, the registered user can grant permission rights to the Filing Agent to pay filing fees via Pay.gov.

- a. Select the applicable Filing Agent's name you wish to provide with permission right to pay filing fees via Pay.gov.
- b. Select *Update permissions*. The *Filing Agent Permissions* screen displays. This screen also shows the filing groups the Registered User is part of. After making the desired change, select *Return to account screen*.
- c. Select *Submit*



- d. The message: "Updated Filing Agent... has access to groups and may pay filing fees electronically" is displayed. Click OK. The agent's permission rights have been updated.

IV. FILING AGENT ALREADY IN THE SYSTEM

If the Filing Agent is already in the system, the *Add a Filing Agent* screen lists all possible Filing Agents for selection.

- a. Click the *Select* button for the appropriate Filing Agent to add to the registered user's account.

The screenshot shows the ECF system interface. At the top, there is a navigation bar with links for Bankruptcy, Adversary, Query, Reports, Utilities, Manual, Search, and Logout. Below this, the user's profile information is displayed for 'Tester Attorney-Presley', including login details, registration status, and internet payment options. The 'Filing agents' section is active, showing a search box with 'Johnson' entered. A modal dialog box titled 'Add a Filing Agent' is open, displaying a table with the following data:

Name	Address
Johnson, Cynthia	1234 Flower Street Los Angeles, CA 90012

A red arrow points to the 'Select' button located to the left of the table row.

- b. The Filing Agent's name will display under the Filing Agents' field with a checkmark next to it, as verification that the agent has been added to the registered user's profile.

The screenshot shows the ECF system interface. The 'Filing agents' section is active, displaying a list of agents. The agent 'Johnson, Cynthia' is listed with a checkmark next to it, indicating it has been added to the user's profile. A red arrow points to the checkmark.

Name	Address
<input checked="" type="checkbox"/> Johnson, Cynthia	[1234 Flower Street, Los Angeles, CA 90012]

- c. To modify the Filing Agent's information or permission rights to pay filing fees via Pay.gov, click on the agent's name *Filing Agent Information* screen is displayed.
- d. Make any needed changes. Note: Only the Register User can update login, password, address, phone number, or other identifiers.

V. PERMISSION FOR FILING AGENT TO PAY USING PAY.GOV

a. Click *More user information*

ECF Bankruptcy Adversary Query Reports Utilities Manual

Maintain User Account

Last name Attorney-Presley First name Tester

Middle name /ECF/ Generation

Title Type aty

Office

Address 1 1694 East Temple Street

Address 2 Suite 1240

Address 3

City Los Angeles State CA Zip 90012

Country County

Phone 123-112-1234 Fax

SSN / ITIN /ECF/ Tax ID / EIN

Bar ID 6062011 Bar status

Initials DOB

Mail group AO code Person end date

Email information... More user information...

Submit Clear

b. Select an Agent

ECF Bankruptcy Adversary Query Rep

More User Information for Tester Attorney-Presley

Login PresleyAttyDB Current login 06-18-2012 15:48

Registered Y Create date 06/06/2011

Internet Payment Y Update date 05/01/2012

Groups Attorney Last login 05-30-2012 12:23

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

Filing agents

Uncheck the box to remove a filing agent.

Cross, Matthew J. [8564 Temple Stree, Los Angeles, CA 90012]

Cross, Matthew [1234 3rd Street, Los Angeles, CA 90012, (213) 555-5121]

Johnson, Cynthia [1234 Flower Street, Los Angeles, CA 90012]

Robinson, Agent [1822 North Topanga Avenue, Los Angeles, CA 90017]

Find filing agent

[Agents previously removed from this account](#)

c. Verify the Agent Name and then Click *Update permissions*

Filing Agent Information

Login CrossJ Last login -

Password ***** Current login -

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

Create date 03/01/2012

Last name Cross First name Matthew

Middle name J. Generation

Title

Office

Address 1 8564 Temple Stree

Address 2

Address 3

City Los Angeles State CA Zip 90012

Country County

Phone Fax

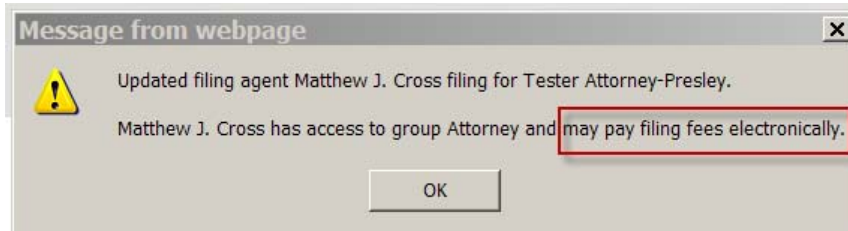
SSN / ITIN DOB

Update permissions

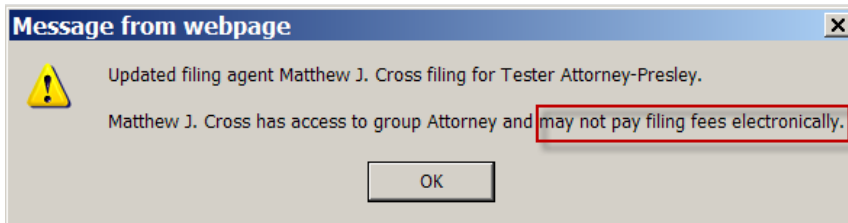
Submit Clear Cancel

- d. Select N or Y depending on whether the filing agent should pay filing fees using Pay.gov

- e. Click *Return to account screen*
- f. Click *Submit* to finalize the update
- g. A confirmation screen will appear as follows:
 - a. Y – filing agent can pay filing fees using Pay.gov



- b. N – filing agent cannot pay filing fees using Pay.gov



- c. Click OK

V. REMOVING FILING AGENT’S ACCESS TO REGISTERED USER’S ACCOUNT

Once removed, a Filing Agent will not be able to file documents for the registered user unless the agent is re-activated later.

- a. Click *More user information*
- b. Remove the checkmark next to name.
- c. Click on *Return to Account Screen*. This will take you back to the Maintain User Account screen.
- d. Select *Submit*. A screen will display stating specific fields were not altered.
- d. Select *Submit* to effect the change.
- e. Select *Return to User Maintenance > More User Information*
- f. Click *Agents previously removed from this account* to verify the change.

VI. REINSTATING AN AGENT PREVIOUSLY REMOVED

- Click on *Agents previously removed from this account*. The Add a Filing Agent (previously removed) screen will display.
- Click the *Select* button for the appropriate Filing Agent to be added back to the registered user's account.
- The Filing Agent's name automatically appears in a listing for your selection.
- Click on the Filing Agent's name to update his/her permission access.
- Select *Update permissions*. The *Filing Agent Permissions* screen displays.
- After making the desired change, select *Return to account screen*.
- Select *Submit*. A message will display regarding the update to the Filing Agent's access.

VII. Updating Telephone Numbers, Email Accounts, and Notice Indicators

- Click Utilities > Maintain Your ECF Account if not already in *Maintain Your User Account Menu*

NOTE: As you access this feature, you will notice that the address information, with the exception of the Phone and Fax numbers, is grayed out and cannot be modified. This is to allow you to verify the address associated with your CM/ECF Login profile. Please refer to Local Rule 2091-1 to change your address

The screenshot shows the 'Maintain User Account' form with the following fields and values:

Last name	Attorney-Presley	First name	Tester
Middle name		Generation	
Title		Type aty	
Office			
Address 1	1694 East Temple Street		
Address 2	Suite 1240		
Address 3			
City	Los Angeles	State	CA
Country		County	
Phone	123-112-1234	Fax	
SSN / ITIN		Tax ID / EIN	
Bar ID	6062011	Bar status	
Initials		DOB	
Email information...		More user information...	
Submit	Clear		

Red arrows point to the Phone and Fax fields. The text 'Test CM/ECF' is visible in the background.

- Click the **Email Information** button

The screenshot shows the 'Maintain User Account' form with the following fields and values:

Last name	Attorney-Presley	First name	Tester
Middle name		Generation	
Title		Type aty	
Office			
Address 1	1694 East Temple Street		
Address 2	Suite 1240		
Address 3			
City	Los Angeles	State	CA
Country		County	
Phone	123-112-1234	Fax	
SSN / ITIN		Tax ID / EIN	
Bar ID	606201	Bar status	
Initials		DOB	
Email information...		More user information...	
Submit	Clear		

A red arrow points to the 'Email information...' button. The text 'Test CM/ECF' is visible in the background.

- c. Update the following email information fields as needed:
- i. **Primary email address** – The Notice of Electronic Filing (NEF) is sent to this email address. You must enter and re-enter the email address to confirm the change.
 - ii. **Secondary email address** – Additional email addresses can be added for noticing purposes. Emails must be separated by a comma. You must enter and re-enter the email address(s) to confirm the change.
 - iii. **Send the notices specified below** (select either one or both options)
 - 1.) primary email account, or
 - 2.) secondary email account
 - iv. **Send notices in cases in which I am involved** – NEFs will be sent to the user on cases where he/she is the attorney-of-record
 - v. **Send notices in these additional cases** – a check will allow you to add specific cases in which you wish to receive NEFs
 - 1.) As case numbers are inserted, a blank field opens for the next number
 - vi. **Send notices for adversary proceedings in which I am directly involved and for their related bankruptcy cases** – NEFs will be sent to the user on adversary proceedings and related cases where he/she is the attorney-of-record; or
 - vii. **Send notices for adversary proceedings in which I am directly involved but not for their related bankruptcy cases** - NEFs will be sent to the user on adversary proceedings where he/she is the attorney-of-record but not on the related bankruptcy cases
 - viii. **Send a notice for each filing** – an NEF will be sent for each document filed, or
 - ix. **Send a Daily Summary Report** – one email will be sent that lists in summary format all cases that had activity, which includes the case number, case name, docket text, and hyperlink to the document
 - x. **Format notices** [select one format]
 - xi. HTML format
 - xii. Text format

The screenshot shows the ECF system interface with the following content:

ECF Bankruptcy Adversary Query Reports Utilities Manual Search

Email information for Tester Attorney-Presley

Primary email address: presleytest@gmail.com Reenter primary email address: presleytest@gmail.com

Secondary email address: presleyusbc@gmail.com Reenter secondary email address: presleyusbc@gmail.com

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

Format notices HTML

Text

Return to Account screen Clear

- d. Select **Return to Account screen**
- e. Select **Submit** to effect the changes to the email preferences

Send notices in these additional cases

1:11-bk-10021
1:11-bk-10060
2:11-bk-10275

Send notices for a adversary in which I directly involved and for the related bankruptcy cases

VIII. TRANSACTION LOG [Utilities > View Your Transaction Log]

- a. Filing Agents can review their own transaction log
- b. Attorney can review the transaction log created by his/her own login
- c. Attorney can review his/her filing agent's transaction log

View Transaction Log

Entered between 3/1/2012 and 6/18/2012

User

- Attorney-Presley, Tester
- Cross, Matthew
- Cross, Matthew J
- Johnson, Cynthia
- Robinson, Agent
- Smith, Agent (D)

(D) indicates a deactivated filing agent

Sort by Date and time

Submit Clear