

Filing Agents for Attorneys & Trustees



***Filing Agents for Attorneys & Trustees***

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WELCOME  
Slide notes:

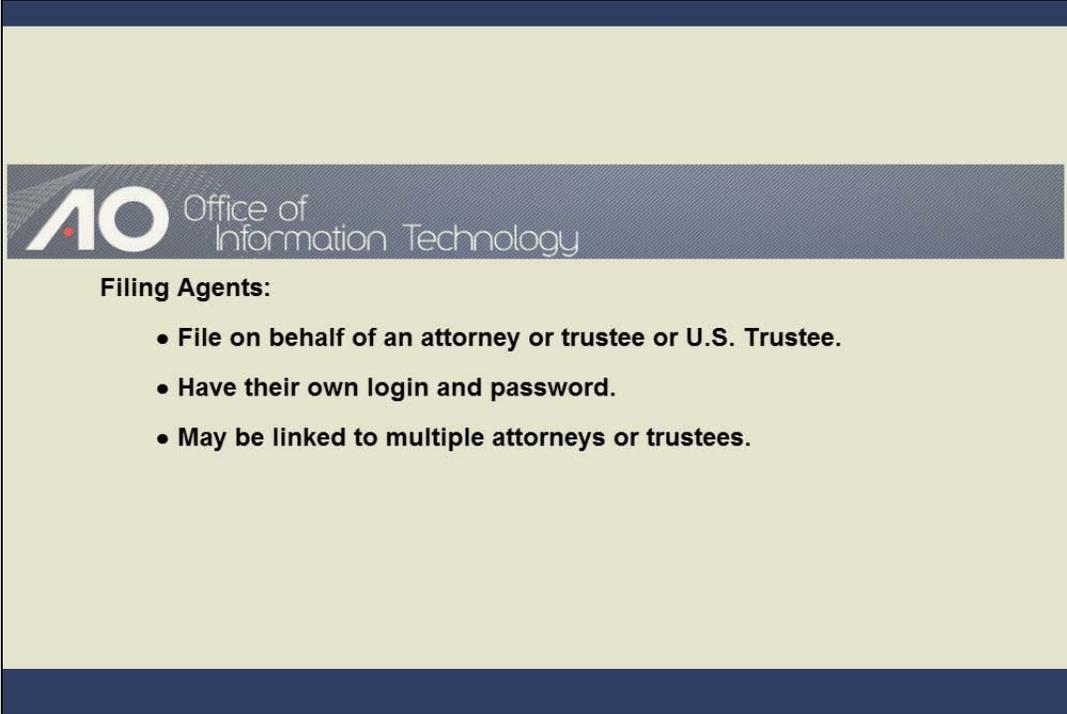
### ***Objectives***

When you complete this module, you should be able to:

- Explain the features of filing agents.
- Create a filing agent in CM/ECF.
- Update permissions for a filing agent.
- Deactivate and reactivate a filing agent.

#### 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.



**AO** Office of  
Information Technology

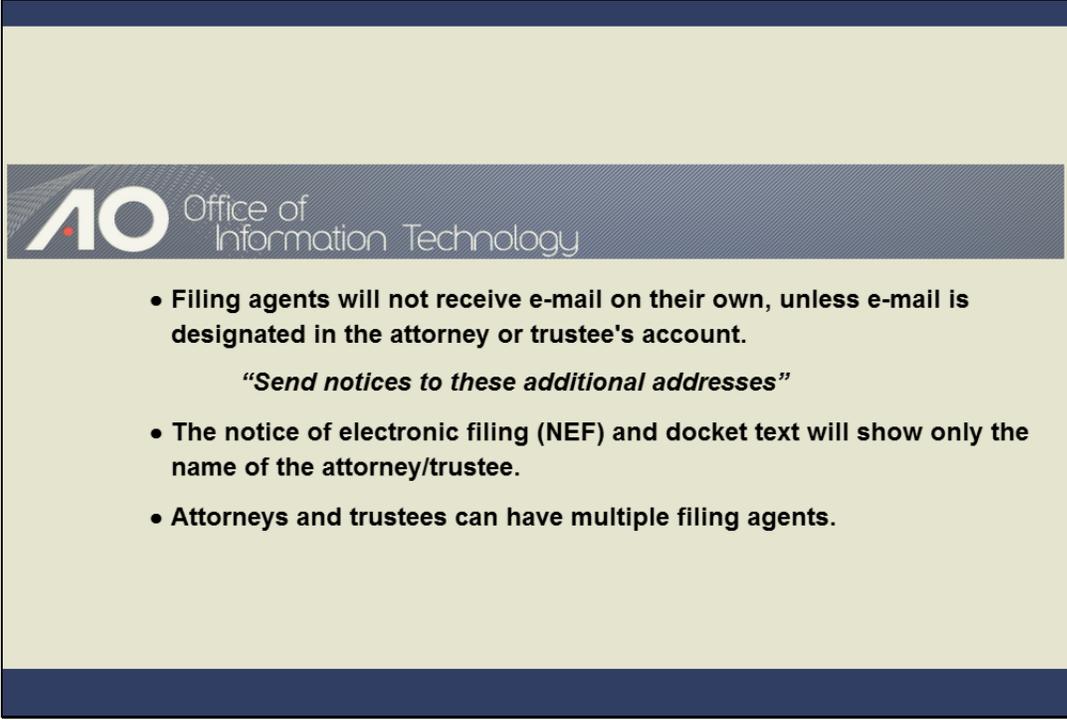
**Filing Agents:**

- **File on behalf of an attorney or trustee or U.S. Trustee.**
- **Have their own login and password.**
- **May be linked to multiple attorneys or trustees.**

Slide 3

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.

A presentation slide with a light beige background and a dark blue header and footer. The header contains the logo 'AO' and the text 'Office of Information Technology'. The main content area features three bullet points and a centered italicized phrase.

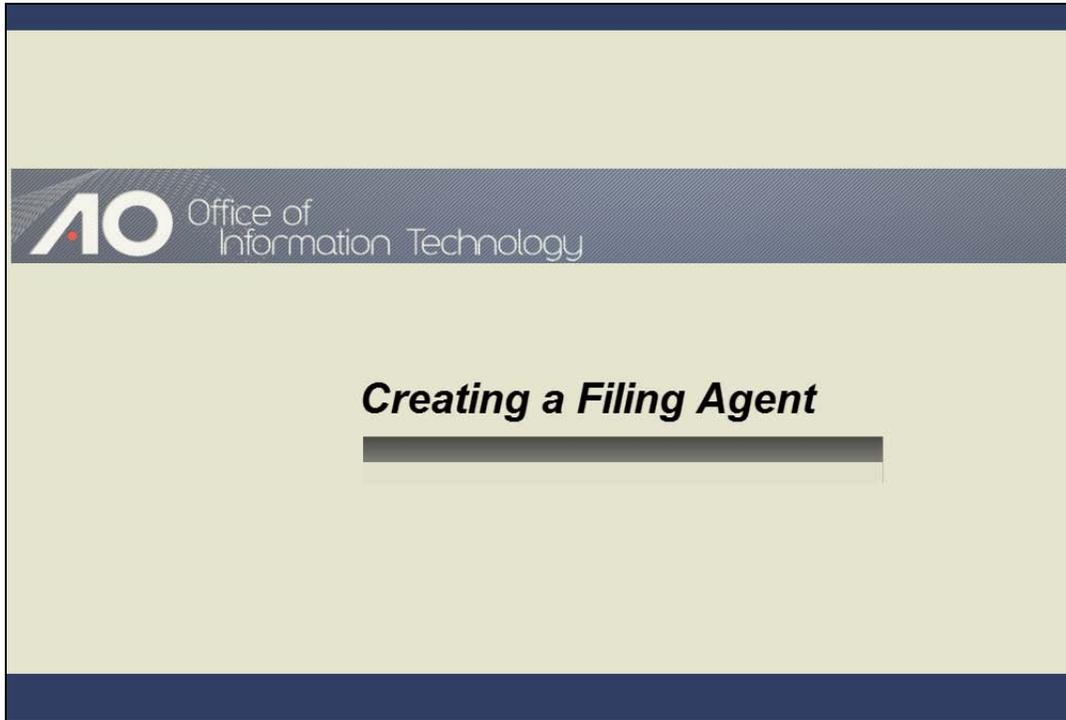
**AO** Office of  
Information Technology

- **Filing agents will not receive e-mail on their own, unless e-mail is designated in the attorney or trustee's account.**  
*“Send notices to these additional addresses”*
- **The notice of electronic filing (NEF) and docket text will show only the name of the attorney/trustee.**
- **Attorneys and trustees can have multiple filing agents.**

Slide 4

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 6

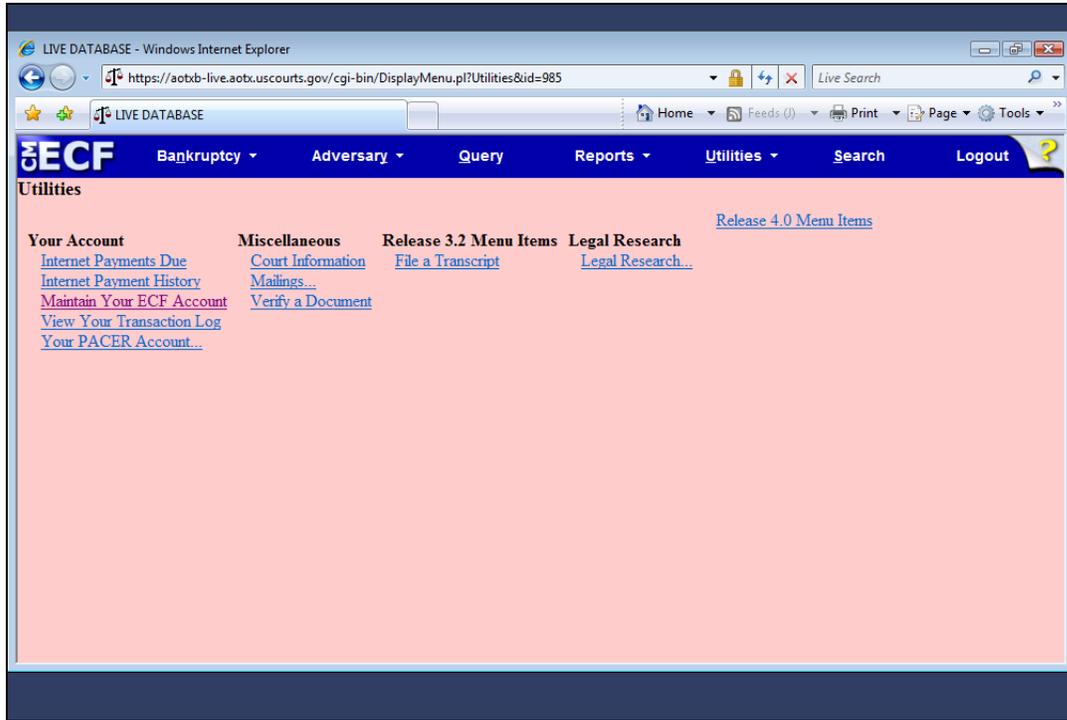
Slide notes: Some courts will allow you, as an attorney or trustee, to create and edit filing agents. The following sections of this module will demonstrate the steps to do this when logged into CM/ECF as the attorney, Norman Drew.

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.



Slide 8

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.

LIVE DATABASE - Windows Internet Explorer  
https://aotxb-live.aotb.uscourts.gov/cgi-bin/atty\_util.pl

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

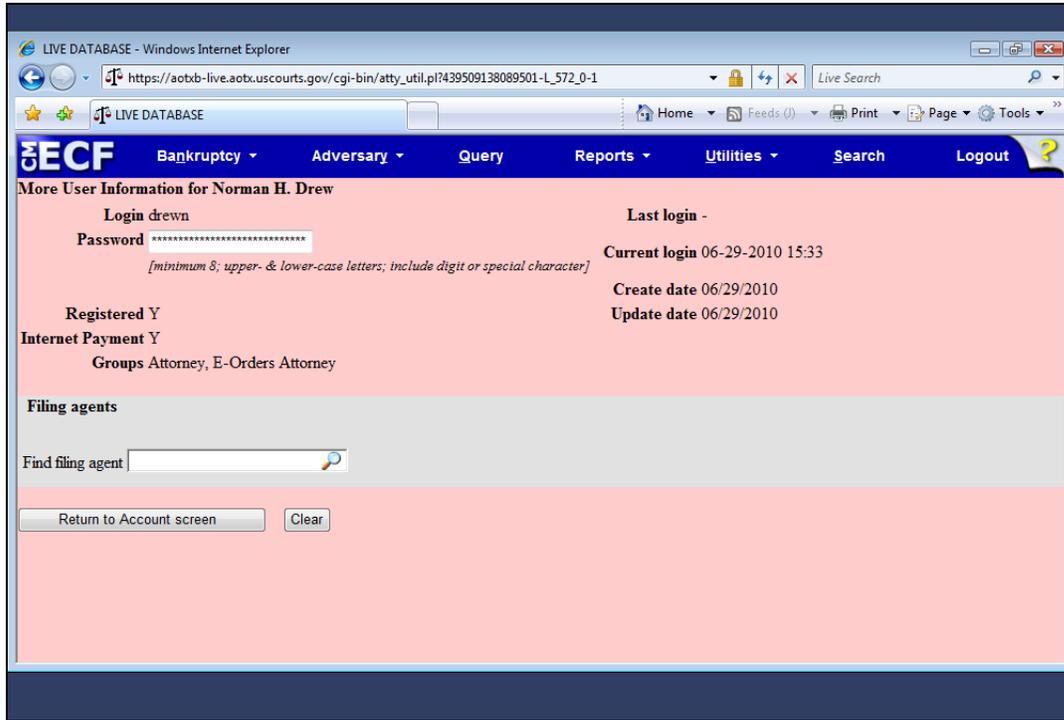
Maintain User Account

Last name Drew First name Norman  
Middle name H. Generation  
Title Type aty  
Office Rodman & Associates, LLC  Add Headers to PDF Documents  
Address 1 8534 North Jefferson Avenue  
Address 2  
Address 3  
City San Antonio State TX Zip 78233  
Country Country BEXAR-TX  
Phone 210-334-2225 Fax  
SSN / ITIN Tax ID / EIN  
Bar ID TX44632 Bar status Active Mail group  
Initials DOB AO code Person end date

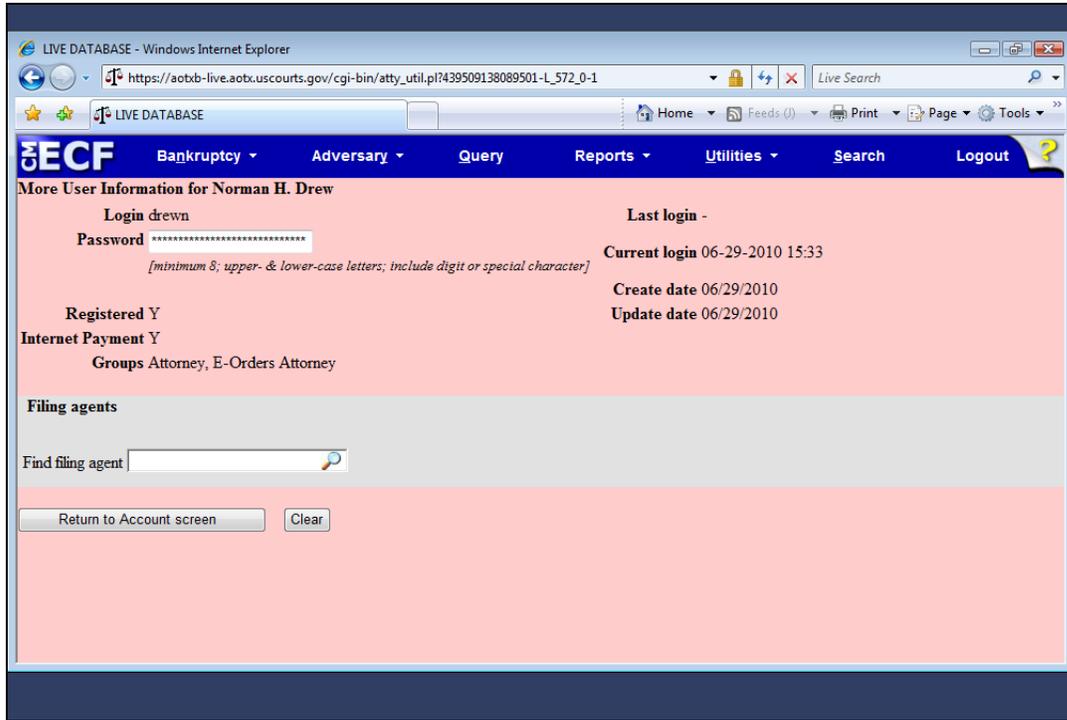
Email information... More user information...  
Submit Clear

Slide 9

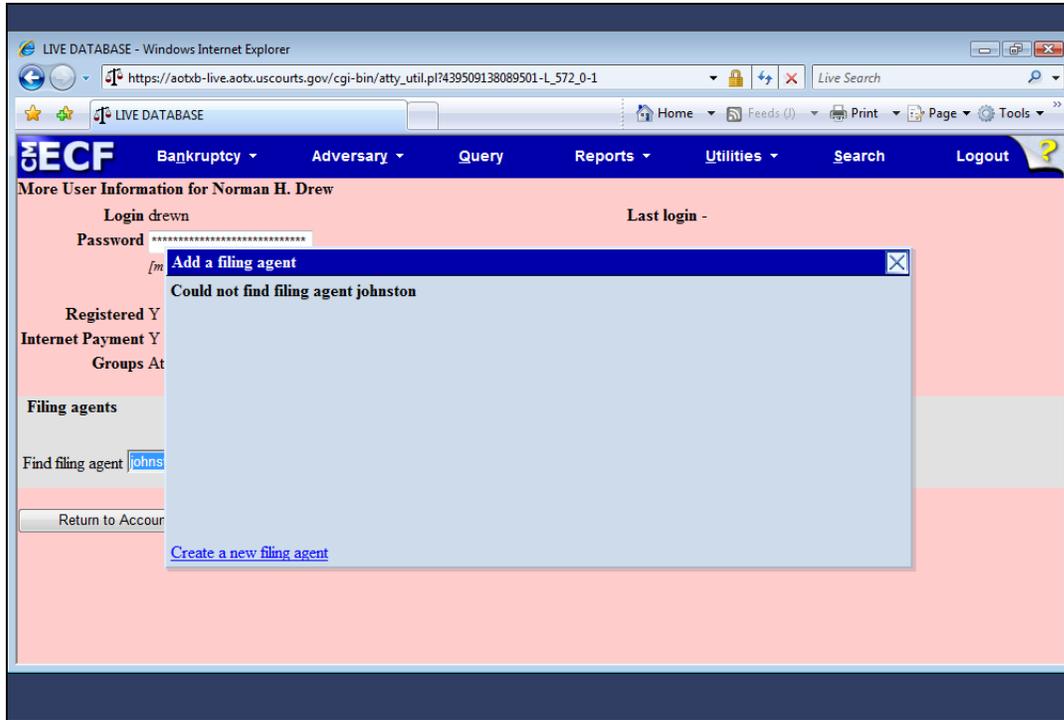
Slide notes: Next, I'll click "More user information," which is where filing agent records are maintained.



Slide 10  
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.



Slide 11  
Slide notes:



Slide 12  
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.

LIVE DATABASE - Windows Internet Explorer  
https://aotxb-live.aotb.uscourts.gov/cgi-bin/agt\_util.pl?name=johnston

**Filing Agent Information**

Login   
Password s6Vu^Vuj  
*[minimum 8, upper- & lower-case letters; include digit or special character]*

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

Slide 13  
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.

LIVE DATABASE - Windows Internet Explorer  
https://aotxb-live.aotb.uscourts.gov/cgi-bin/agt\_util.pl?name=johnston

**Filing Agent Information**

Login   
Password s6Vu^Vuj  
*[minimum 8, upper- & lower-case letters; include digit or special character]*

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

Done Internet | Protected Mode: Off 100%

Slide 14  
Slide notes:

The screenshot shows a web browser window titled "LIVE DATABASE - Windows Internet Explorer". The address bar contains the URL "https://aotxb-live.aotb.uscourts.gov/cgi-bin/agt\_util.pl?name=johnston". The page content is a form titled "Filing Agent Information" with a light pink background. The form fields are as follows:

- Login:** johnstons
- Password:** s6Vu^Vj (with a note: [minimum 8, upper- & lower-case letters; include digit or special character])
- Last name:** Johnston
- First name:** [empty]
- Middle name:** [empty]
- Generation:** [empty]
- Title:** [empty]
- Office:** [empty]
- Address 1:** [empty]
- Address 2:** [empty]
- Address 3:** [empty]
- City:** [empty]
- State:** [empty]
- Zip:** [empty]
- Country:** [empty]
- County:** [dropdown menu]
- Phone:** [empty]
- Fax:** [empty]
- SSN / ITIN:** [empty]
- DOB:** [empty]

Slide 15

Slide notes: Next, I add a first name and middle initial.

LIVE DATABASE - Windows Internet Explorer  
https://aotxb-live.aotb.uscourts.gov/cgi-bin/agt\_util.pl?name=johnston

**Filing Agent Information**

Login johnstons  
Password Johnston2010  
*[minimum 8, upper- & lower-case letters; include digit or special character]*

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

Done Internet | Protected Mode: Off 100%

Slide 16  
Slide notes:

LIVE DATABASE - Windows Internet Explorer  
https://aotxb-live.aotb.uscourts.gov/cgi-bin/agt\_util.pl?name=johnston

**Filing Agent Information**

Login johnstons  
Password Johnston2010  
*[minimum 8, upper- & lower-case letters; include digit or special character]*

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

Done Internet | Protected Mode: Off 100%

Slide 17

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...

The screenshot shows a Windows Internet Explorer browser window displaying a registration form for 'LIVE DATABASE'. The browser's address bar shows the URL: https://aotxb-live.aotb.uscourts.gov/cgi-bin/agt\_util.pl?name=johnston. The form is titled 'LIVE DATABASE' and contains the following fields:

- Login:** johnstons
- Password:** Johnston2010 (with a note: [minimum 8; upper- & lower-case letters; include digit or special character])
- Last name:** Johnston
- First name:** Susan
- Middle name:** C.
- Generation:** (empty)
- Title:** (empty)
- Office:** (empty)
- Address 1:** (empty)
- Address 2:** (empty)
- Address 3:** (empty)
- City:** (empty)
- State:** (empty)
- Zip:** (empty)
- Country:** (empty)
- County:** (dropdown menu)
- Phone:** (empty)
- Fax:** (empty)
- SSN / ITIN:** (empty)
- DOB:** (empty)

At the bottom of the form, there are two buttons: 'Submit' and 'Clear'. The browser's status bar at the bottom indicates 'Done' and 'Internet | Protected Mode: Off'.

Slide 18

Slide notes: ...and click SUBMIT.

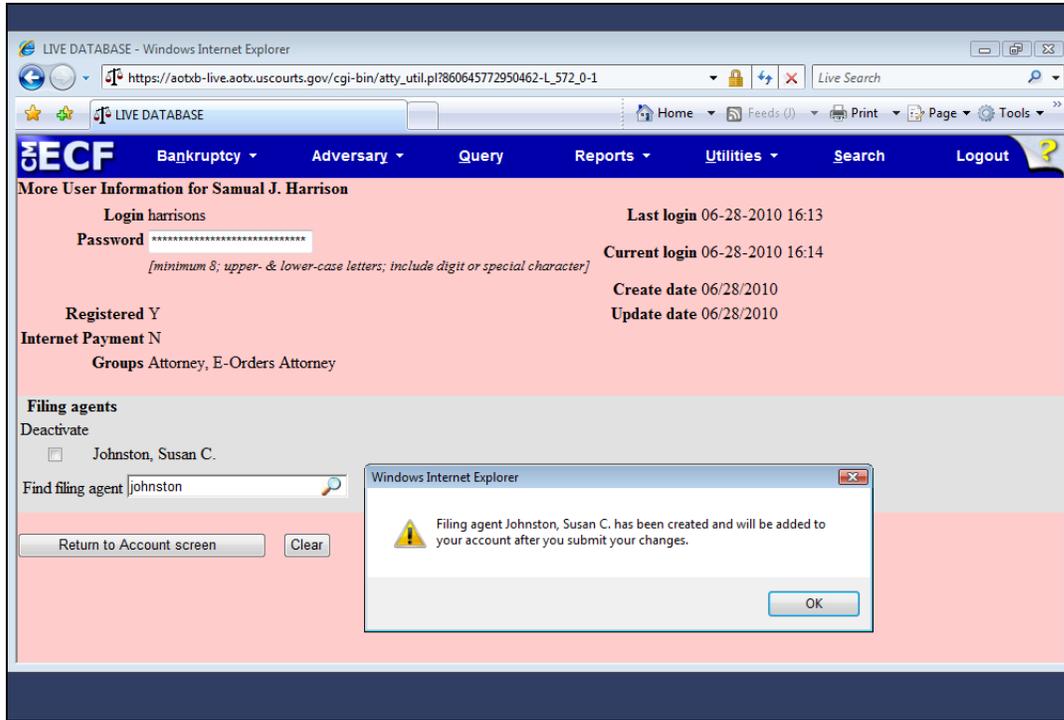
The screenshot shows a web browser window titled "LIVE DATABASE - Windows Internet Explorer". The address bar contains the URL "https://aotxb-live.aotxb.uscourts.gov/cgi-bin/agt\_util.pl?name=johnston". The page content is a registration form with the following fields and values:

- Login:** johnstons
- Password:** Johnston2010 (with a note: *[minimum 8; upper- & lower-case letters; include digit or special character]*)
- Last name:** Johnston
- First name:** Susan
- Middle name:** C.
- Generation:** (empty)
- Title:** (empty)
- Office:** (empty)
- Address 1:** (empty)
- Address 2:** (empty)
- Address 3:** (empty)
- City:** (empty)
- State:** (empty)
- Zip:** (empty)
- Country:** (empty)
- County:** (dropdown menu)
- Phone:** (empty)
- Fax:** (empty)
- SSN / ITIN:** (empty)
- DOB:** (empty)

At the bottom of the form are "Submit" and "Clear" buttons. The browser status bar at the bottom indicates "Waiting for https://aotxb-live.aotxb.uscourts.gov/cgi-bin/agt\_util.pl?208" and "Internet | Protected Mode: Off".

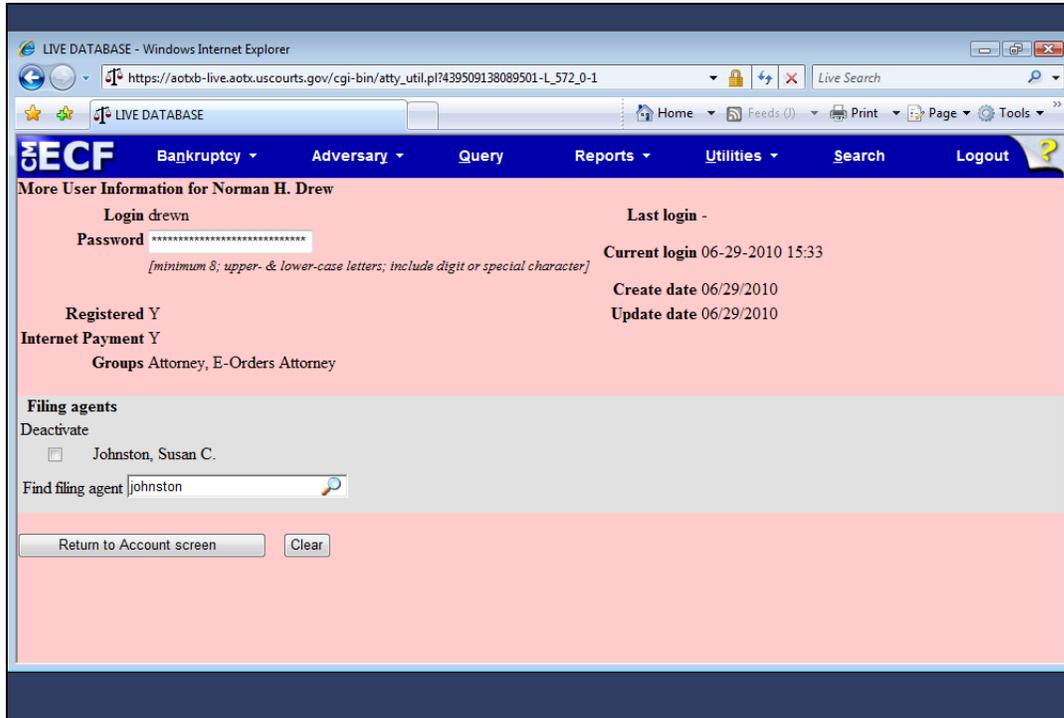
Slide 19

Slide notes:



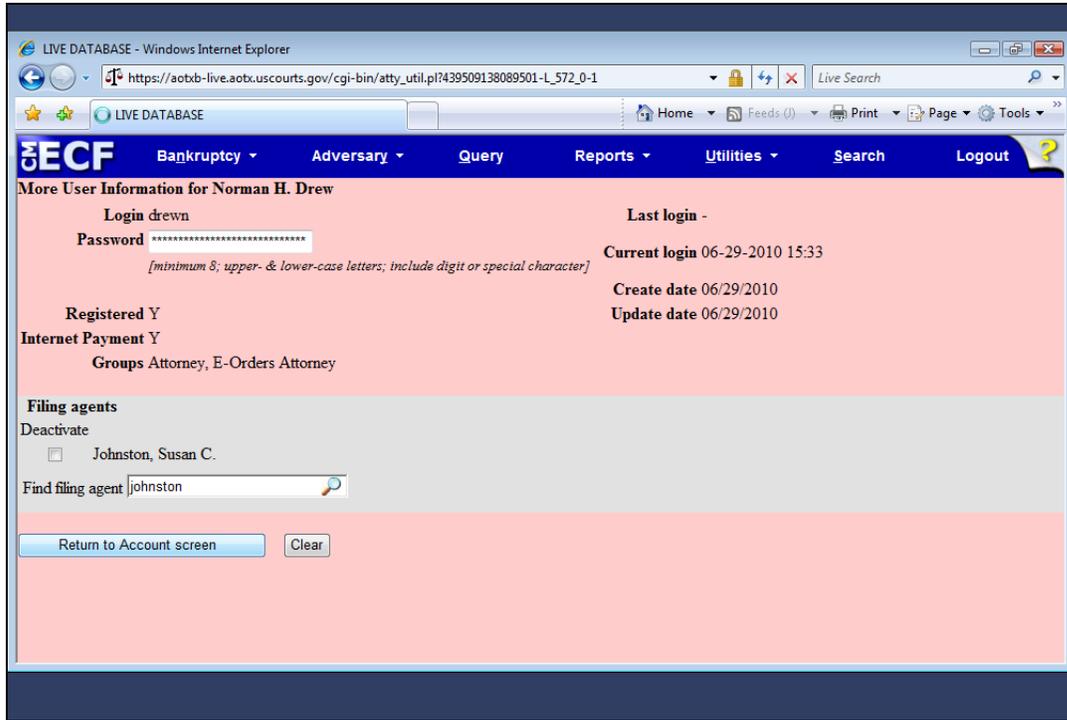
Slide 20

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.



Slide 21

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



Slide 22  
Slide notes:

LIVE DATABASE - Windows Internet Explorer  
https://aotxb-live.aotb.uscourts.gov/cgi-bin/atty\_util.pl?567180957860456-L\_9999\_1

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

Maintain User Account

Last name Drew First name Norman  
Middle name H. Generation  
Title Type aty  
Office Rodman & Associates, LLC  Add Headers to PDF Documents  
Address 1 8534 North Jefferson Avenue  
Address 2  
Address 3  
City San Antonio State TX Zip 78233  
Country County BEXAR-TX  
Phone 210-334-2225 Fax  
SSN / ITIN Tax ID / EIN  
Bar ID TX44632 Bar status Active Mail group  
Initials DOB AO code Person end date

Email information... More user information...  
Submit Clear

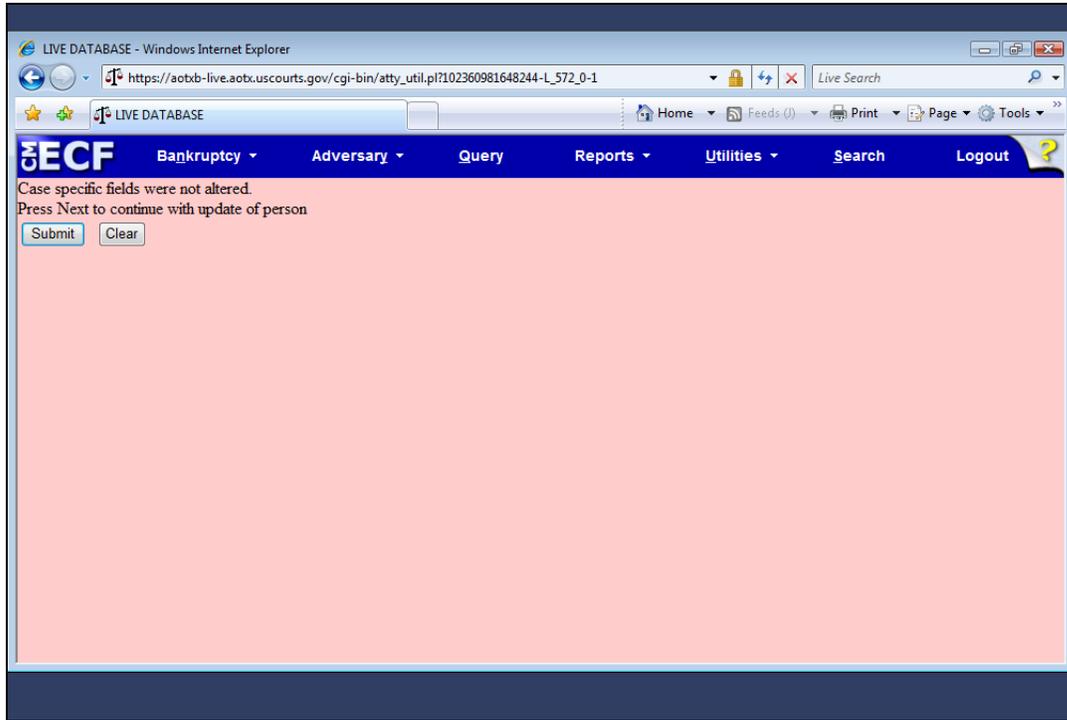
Slide 23

Slide notes: Next, I'll click Submit.

The screenshot shows a web browser window with the URL [https://aotxb-live.aotb.uscourts.gov/cgi-bin/atty\\_util.pl?567180957860456-L\\_9999\\_1](https://aotxb-live.aotb.uscourts.gov/cgi-bin/atty_util.pl?567180957860456-L_9999_1). The page title is "LIVE DATABASE - Windows Internet Explorer". The browser's address bar shows the URL. The page content includes a navigation menu with "Bankruptcy", "Adversary", "Query", "Reports", "Utilities", "Search", and "Logout". The main heading is "Maintain User Account". The form fields are as follows:

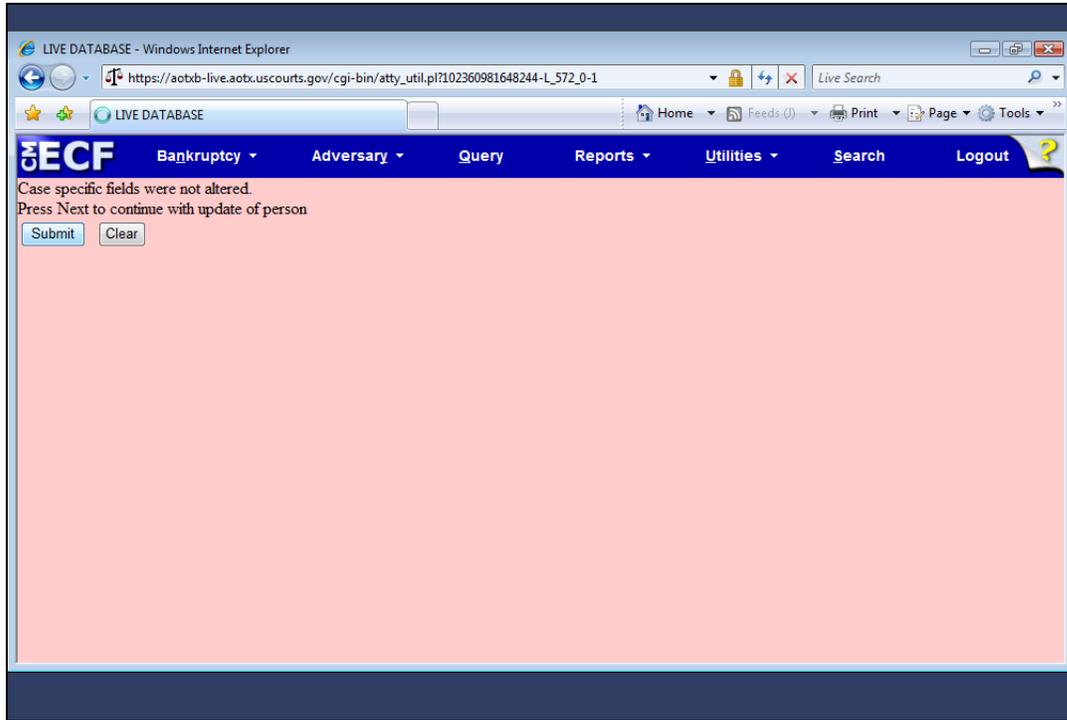
Last name	Drew	First name	Norman
Middle name	H.	Generation	
Title		Type aty	
Office	Rodman & Associates, LLC	<input checked="" type="checkbox"/> Add Headers to PDF Documents	
Address 1	8534 North Jefferson Avenue		
Address 2			
Address 3			
City	San Antonio	State	TX
		Zip	78233
Country		County	
Phone	210-334-2225	Fax	
SSN / ITIN		Tax ID / EIN	
Bar ID	TX44632	Bar status	Active
Initials		Mail group	
		AO code	
		Person end date	
<input type="button" value="Email information..."/>		<input type="button" value="More user information..."/>	
<input type="button" value="Submit"/>	<input type="button" value="Clear"/>		

Slide 24  
Slide notes:



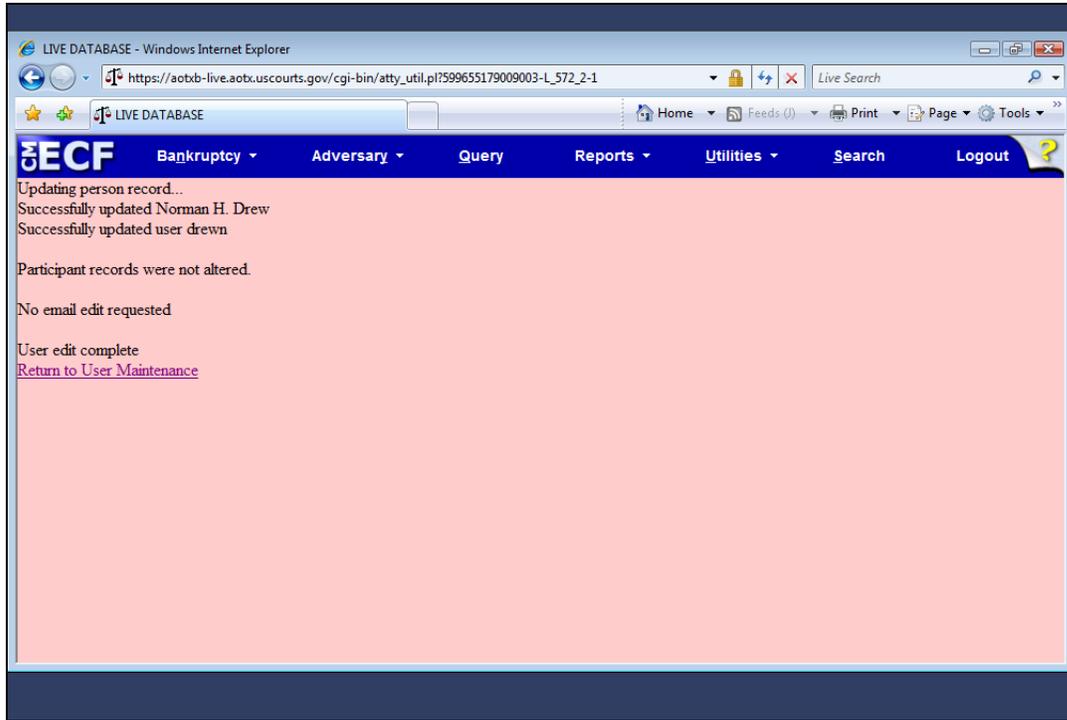
Slide 25

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...



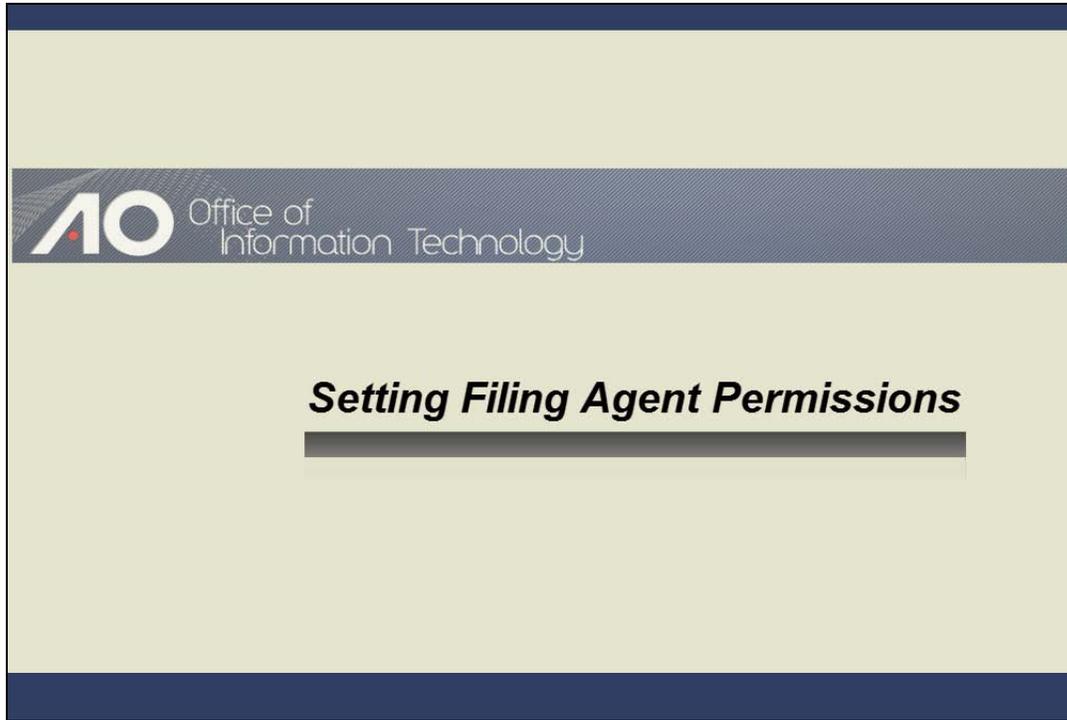
Slide 26

Slide notes:



Slide 27

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



SETTING FILING AGENT PERMISSIONS

Slide notes:

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

**Maintain User Account**

Last name: Drew First name: Norman  
 Middle name: H. Generation:   
 Title: Type aty:   
 Office: Rodman & Associates, LLC  Add Headers to PDF Documents  
 Address 1: 8534 North Jefferson Avenue  
 Address 2:   
 Address 3:   
 City: San Antonio State: TX Zip: 78233  
 Country: County: BEXAR-TX  
 Phone: 210-334-2225 Fax:   
 SSN / ITIN: Tax ID / EIN:   
 Bar ID: TX44632 Bar status: Active Mail group:   
 Initials: DOB: AO code: Person end date:   
 Email information... More user information...  
 Submit Clear

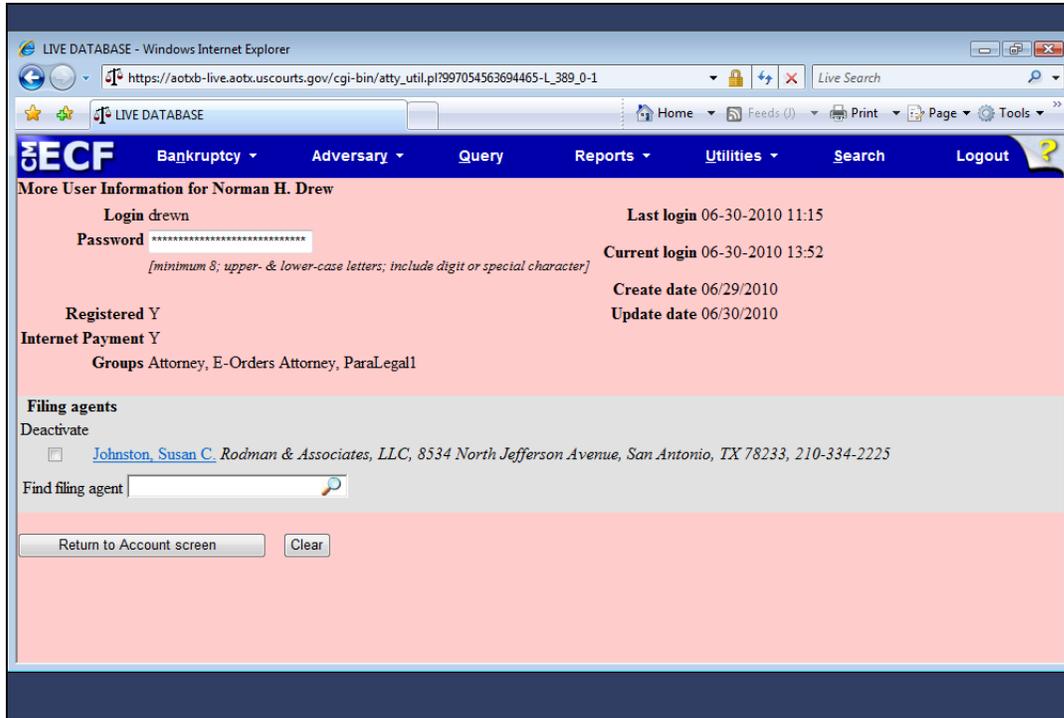
Slide 29  
 Slide notes: Your court may also allow attorneys or trustees to set or modify filing agent permissions. To edit the newly created filing agent record, I'll first click "More user information."

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

**Maintain User Account**

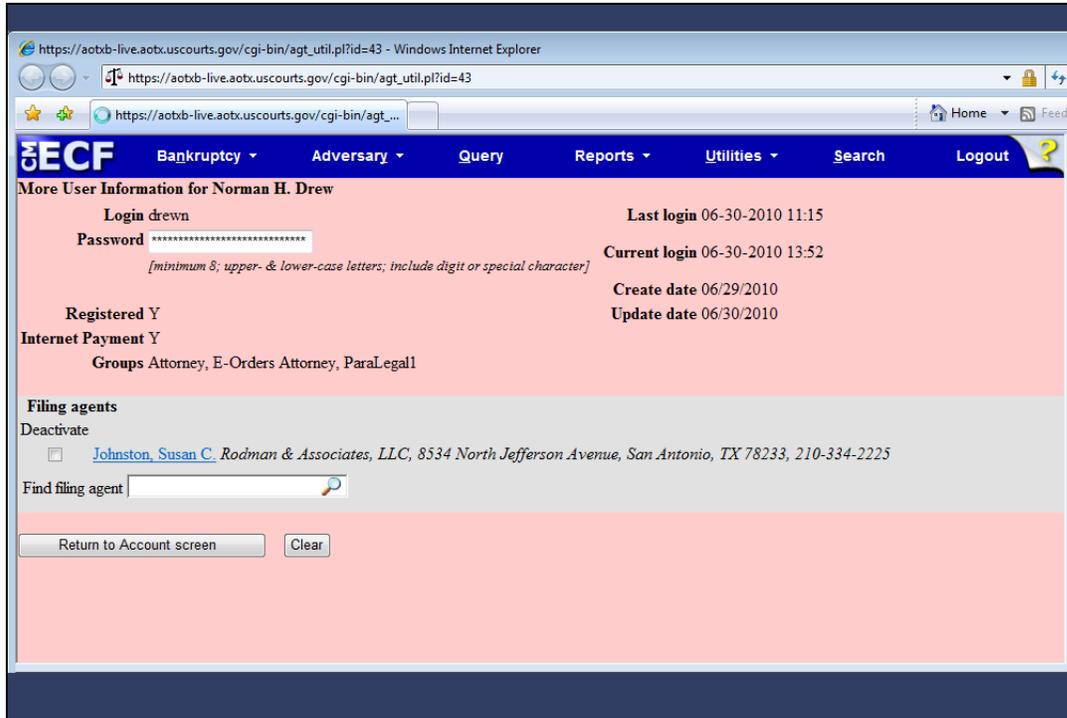
Last name: Drew First name: Norman  
Middle name: H. Generation:   
Title:  Type aty:   
Office: Rodman & Associates, LLC  Add Headers to PDF Documents  
Address 1: 8534 North Jefferson Avenue  
Address 2:   
Address 3:   
City: San Antonio State: TX Zip: 78233  
Country:  County: BEXAR-TX  
Phone: 210-334-2225 Fax:   
SSN / ITIN:  Tax ID / EIN:   
Bar ID: TX44632 Bar status: Active Mail group:   
Initials:  DOB:  AO code:  Person end date:

Slide 30  
Slide notes:



Slide 31

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



Slide 32  
Slide notes:

**Filing Agent Information**

**Login** johnstons **Last login -**  
**Password** \*\*\*\*\* **Current login** 06-30-2010 14:59  
[minimum 8, upper- & lower-case letters; include digit or special character] **Create date** 06/29/2010

---

**Last name** Johnston **First name** Susan  
**Middle name** C. **Generation**

**Title** Para Legal  
**Office** Rodman & Associates, LLC  
**Address 1** 8534 North Jefferson Avenue  
**Address 2**  
**Address 3**

**City** San Antonio **State** TX **Zip** 78233  
**Country** **County**

**Phone** 210-334-2225 **Fax**  
**SSN / ITIN** **DOB**

[Update permissions](#)

Slide 33

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

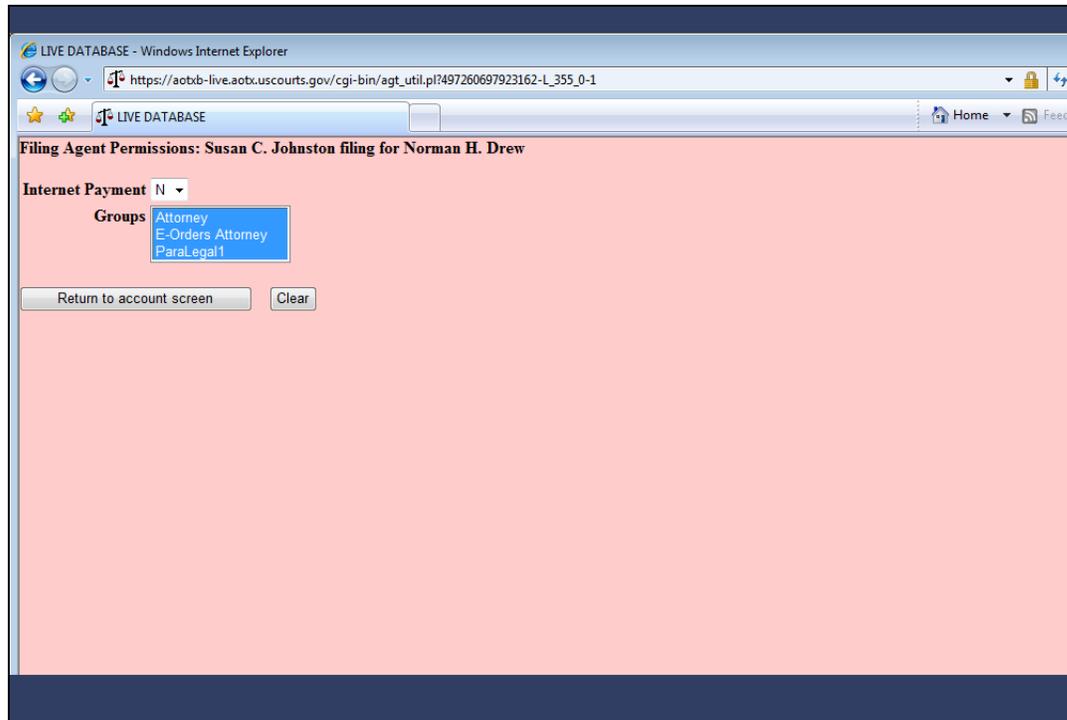
**Filing Agent Information**

**Login** johnstons **Last login -**  
**Password** \*\*\*\*\* **Current login** 06-30-2010 14:59  
*[minimum 8, upper- & lower-case letters; include digit or special character]* **Create date** 06/29/2010

---

**Last name** Johnston **First name** Susan  
**Middle name** C. **Generation** \_\_\_\_\_  
**Title** Para Legal  
**Office** Rodman & Associates, LLC  
**Address 1** 8534 North Jefferson Avenue  
**Address 2** \_\_\_\_\_  
**Address 3** \_\_\_\_\_  
**City** San Antonio **State** TX **Zip** 78233  
**Country** \_\_\_\_\_ **County** BEXAR-TX  
**Phone** 210-334-2225 **Fax** \_\_\_\_\_  
**SSN / ITIN** \_\_\_\_\_ **DOB** \_\_\_\_\_

Slide 34  
Slide notes:



Slide 35

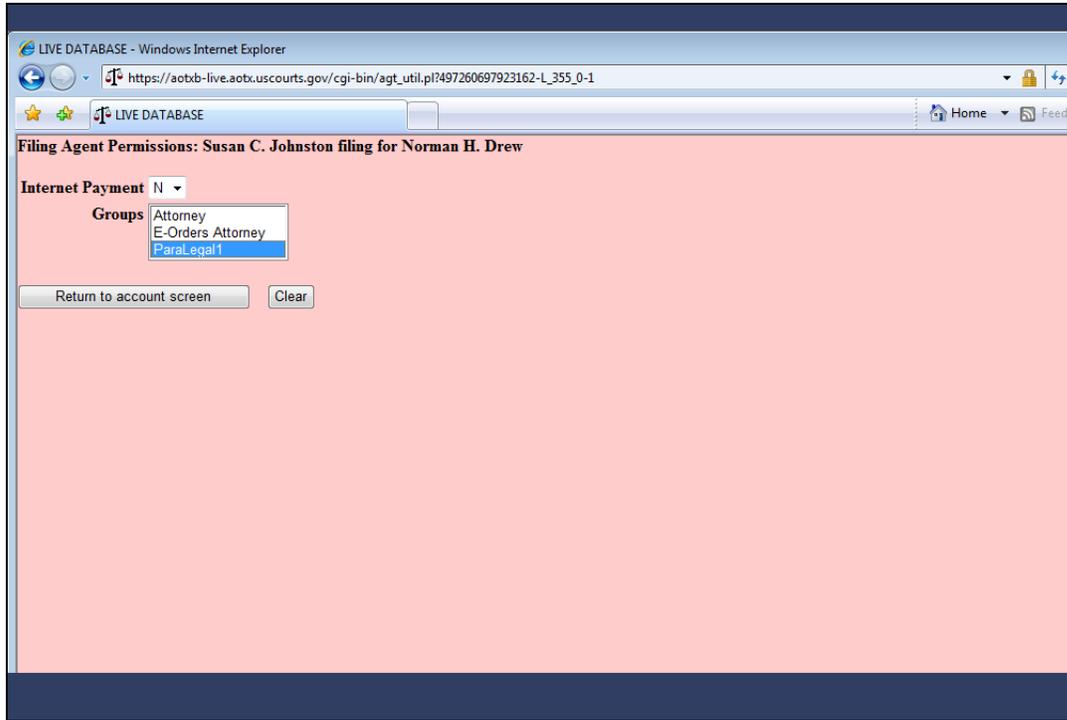
Slide notes: Access permissions for filing agents are determined and maintained by the court or by the associated attorney or trustee. The filing agent cannot maintain his or her own access permissions.

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.

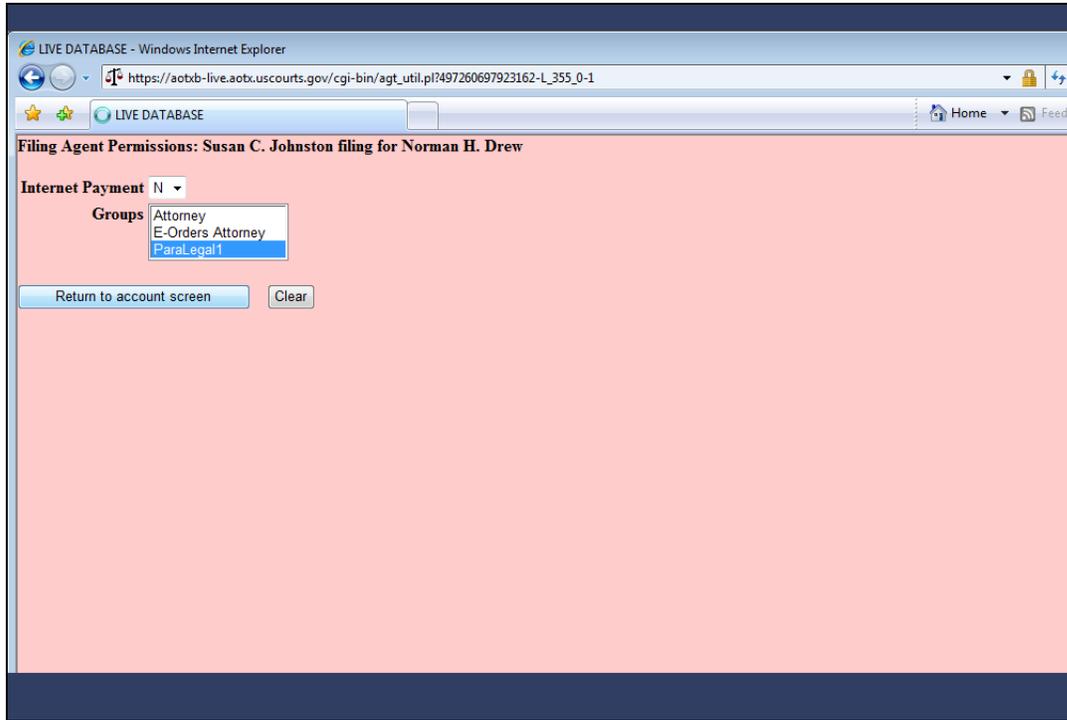
As I stated before, most of the time, attorneys and trustees will allow their filing agents the same permissions as they have. If no change is made to this screen, this filing agent would be granted all permissions of the Attorney, E-Orders Attorney and ParaLegal1 groups.

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.



Slide 36

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



Slide 37

Slide notes:

LIVE DATABASE - Windows Internet Explorer  
https://aotxb-live.aotb.uscourts.gov/cgi-bin/agt\_util.pl?561932679636603-L\_355\_2-1

**Filing Agent Information**

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

Last login -  
Current login -  
Create date 06/29/2010

Last name Johnston  
First name Susan  
Middle name C.  
Generation  
Title Para Legal  
Office Rodman & Associates, LLC  
Address 1 8534 North Jefferson Avenue  
Address 2  
Address 3  
City San Antonio  
State TX Zip 78233  
Country  
County  
Phone 210-334-2225  
Fax  
SSN / ITIN  
DOB

Update permissions

Slide 38  
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.

**Filing Agent Information**

<b>Login</b> johnstons	<b>Last login</b> -
<b>Password</b> ***** <small>[minimum 8, upper- &amp; lower-case letters; include digit or special character]</small>	<b>Current login</b> -
	<b>Create date</b> 06/29/2010
<b>Last name</b> Johnston	<b>First name</b> Susan
<b>Middle name</b> C.	<b>Generation</b>
<b>Title</b> Para Legal	
<b>Office</b> Rodman & Associates, LLC	
<b>Address 1</b> 8534 North Jefferson Avenue	
<b>Address 2</b>	
<b>Address 3</b>	
<b>City</b> San Antonio	<b>State</b> TX <b>Zip</b> 78233
<b>Country</b>	<b>County</b> BEXAR-TX
<b>Phone</b> 210-334-2225	<b>Fax</b>
<b>SSN / ITIN</b>	<b>DOB</b>

Slide 39

Slide notes: I'll first move to the bottom of the screen...

The screenshot shows a web browser window titled "LIVE DATABASE - Windows Internet Explorer". The address bar contains the URL: [https://aotxb-live.aotb.uscourts.gov/cgi-bin/agt\\_util.pl?561932679636603-L\\_355\\_2-1](https://aotxb-live.aotb.uscourts.gov/cgi-bin/agt_util.pl?561932679636603-L_355_2-1). The page content is a user profile form with the following fields and values:

- Password:** [Redacted] [minimum 8; upper- & lower-case letters; include digit or special character]
- Current login -**
- Create date:** 06/29/2010
- Last name:** Johnston
- First name:** Susan
- Middle name:** C.
- Generation:** [Redacted]
- Title:** Para Legal
- Office:** Rodman & Associates, LLC
- Address 1:** 8534 North Jefferson Avenue
- Address 2:** [Redacted]
- Address 3:** [Redacted]
- City:** San Antonio
- State:** TX
- Zip:** 78233
- Country:** [Redacted]
- County:** BEXAR-TX
- Phone:** 210-334-2225
- Fax:** [Redacted]
- SSN / ITIN:** [Redacted]
- DOB:** [Redacted]

At the bottom of the form, there is an "Update permissions" button, and "Submit" and "Clear" buttons. The browser status bar at the bottom shows "Done", "Internet | Protected Mode: Off", and "100%".

Slide 40

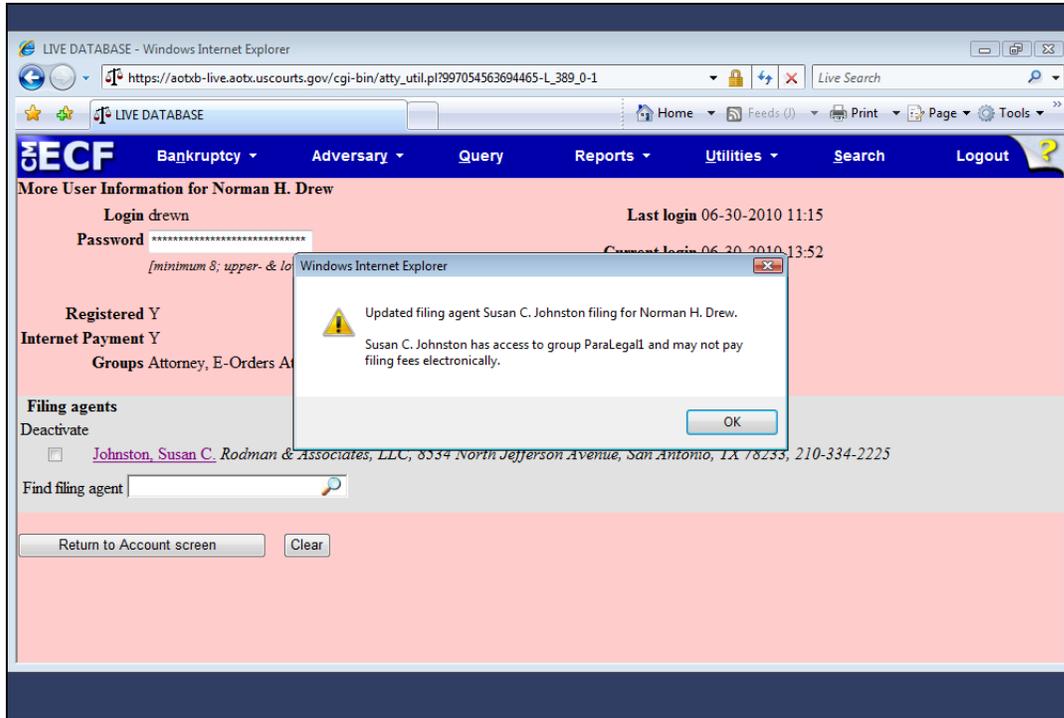
Slide notes: ...and click Submit.

The screenshot shows a web browser window titled "LIVE DATABASE - Windows Internet Explorer". The address bar contains the URL: [https://aotxb-live.aotbx.uscourts.gov/cgi-bin/agt\\_util.pl?561932679636603-L\\_355\\_2-1](https://aotxb-live.aotbx.uscourts.gov/cgi-bin/agt_util.pl?561932679636603-L_355_2-1). The page content is a user profile form with a pink background. At the top left, there is a "Password" field with a masked value and a note: "[minimum 8; upper- & lower-case letters; include digit or special character]". To the right, under "Current login -", the "Create date" is 06/29/2010. The form fields are organized as follows:

<b>Last name</b> Johnston	<b>First name</b> Susan
<b>Middle name</b> C.	<b>Generation</b>
<b>Title</b> Para Legal	
<b>Office</b> Rodman & Associates, LLC	
<b>Address 1</b> 8534 North Jefferson Avenue	
<b>Address 2</b>	
<b>Address 3</b>	
<b>City</b> San Antonio	<b>State</b> TX <b>Zip</b> 78233
<b>Country</b>	<b>County</b> BEXAR-TX
<b>Phone</b> 210-334-2225	<b>Fax</b>
<b>SSN / ITIN</b>	<b>DOB</b>

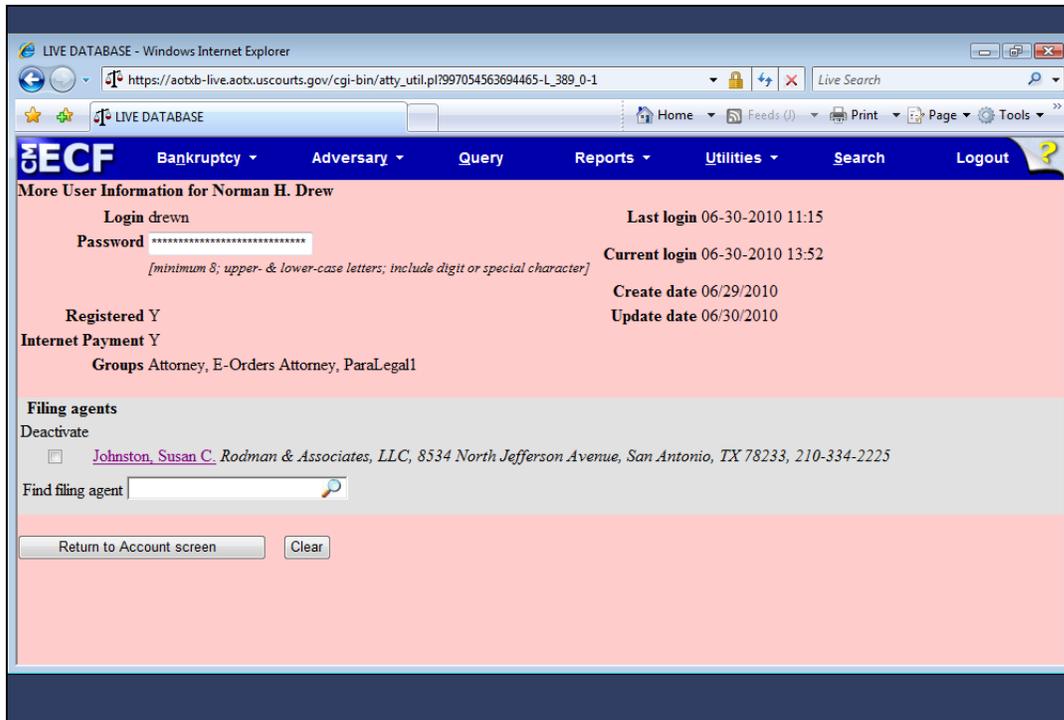
At the bottom of the form, there is an "Update permissions" button, and "Submit" and "Clear" buttons. The browser status bar at the bottom shows "Waiting for https://aotxb-live.aotbx.uscourts.gov/cgi-bin/agt\_util.pl?783" and "Internet | Protected Mode: Off".

Slide 41  
Slide notes:



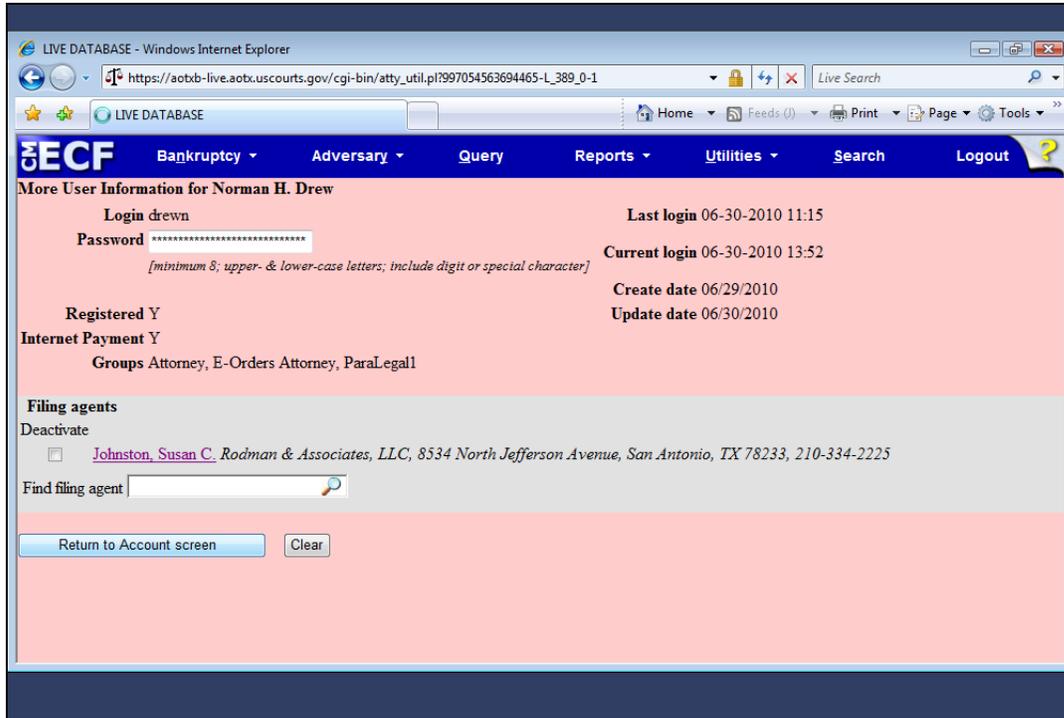
Slide 42

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...



Slide 43

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



Slide 44  
Slide notes:

The screenshot shows a web browser window with the URL [https://aotxb-live.aotb.uscourts.gov/cgi-bin/atty\\_util.pl?816640643366434-L\\_9999\\_1](https://aotxb-live.aotb.uscourts.gov/cgi-bin/atty_util.pl?816640643366434-L_9999_1). The page title is "LIVE DATABASE - Windows Internet Explorer". The browser's address bar shows the URL. The page content includes a navigation menu with "Bankruptcy", "Adversary", "Query", "Reports", "Utilities", "Search", and "Logout". The main heading is "Maintain User Account".

The form fields are as follows:

- Last name: Drew
- First name: Norman
- Middle name: H.
- Generation: [empty]
- Title: [empty]
- Type aty: [empty]
- Office: Rodman & Associates, LLC
- Add Headers to PDF Documents
- Address 1: 8534 North Jefferson Avenue
- Address 2: [empty]
- Address 3: [empty]
- City: San Antonio
- State: TX
- Zip: 78233
- Country: [empty]
- County: [empty]
- Phone: 210-334-2225
- Fax: [empty]
- SSN / ITIN: [empty]
- Tax ID / EIN: [empty]
- Bar ID: TX44632
- Bar status: Active
- Mail group: [empty]
- Initials: [empty]
- DOB: [empty]
- AO code: [empty]
- Person end date: [empty]

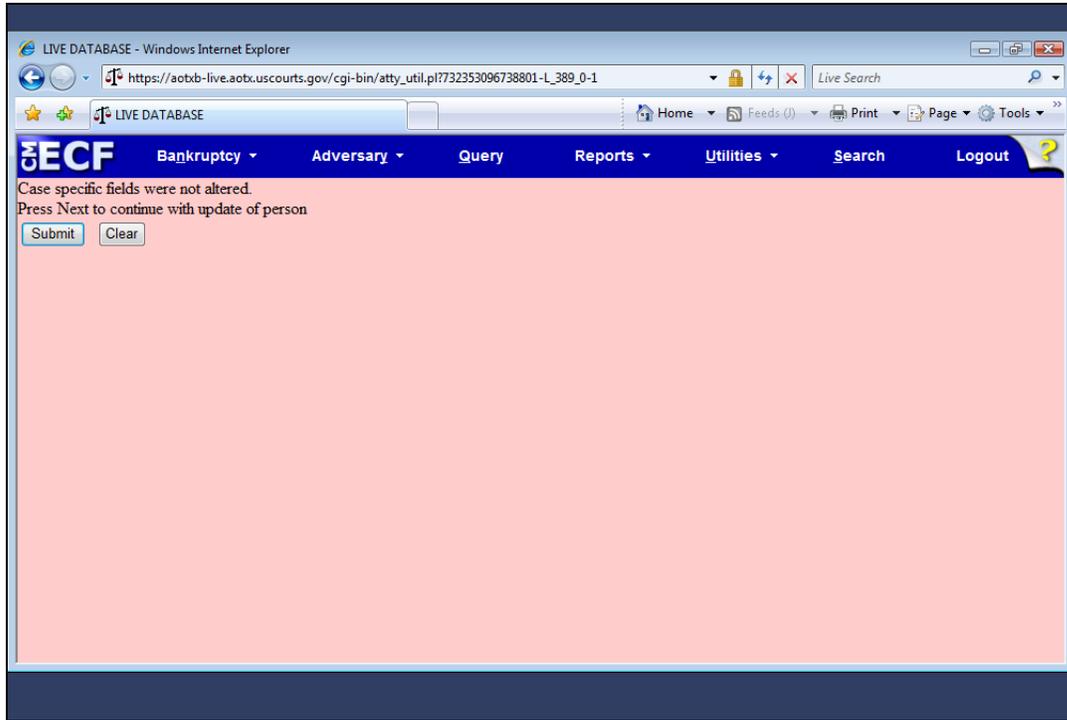
Buttons at the bottom include "Email information...", "More user information...", "Submit", and "Clear".

Slide 45

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

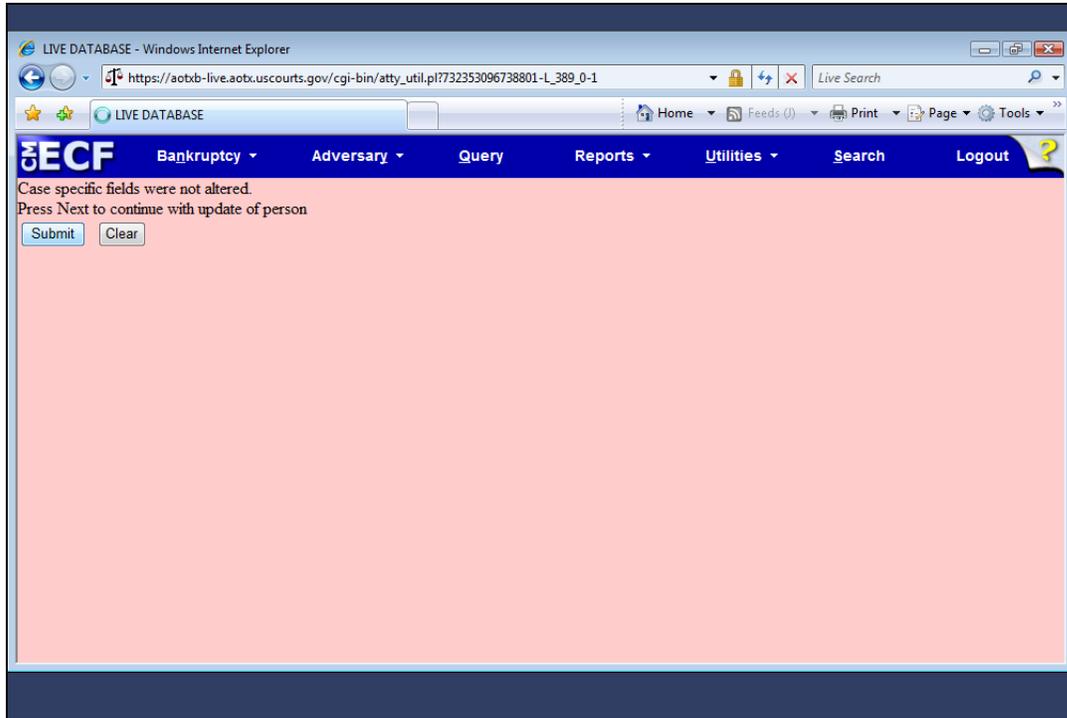
LIVE DATABASE - Windows Internet Explorer  
https://aotxb-live.aotb.uscourts.gov/cgi-bin/atty\_util.pl?816640643366434-L\_9999\_1  
LIVE DATABASE  
Home Feeds (4) Print Page Tools  
ECF Bankruptcy Adversary Query Reports Utilities Search Logout  
Maintain User Account  
Last name Drew First name Norman  
Middle name H. Generation  
Title Type aty  
Office Rodman & Associates, LLC  Add Headers to PDF Documents  
Address 1 8534 North Jefferson Avenue  
Address 2  
Address 3  
City San Antonio State TX Zip 78233  
Country County BEXAR-TX  
Phone 210-334-2225 Fax  
SSN / ITIN Tax ID / EIN  
Bar ID TX44632 Bar status Active Mail group  
Initials DOB AO code Person end date  
Email information... More user information...  
Submit Clear

Slide 46  
Slide notes:



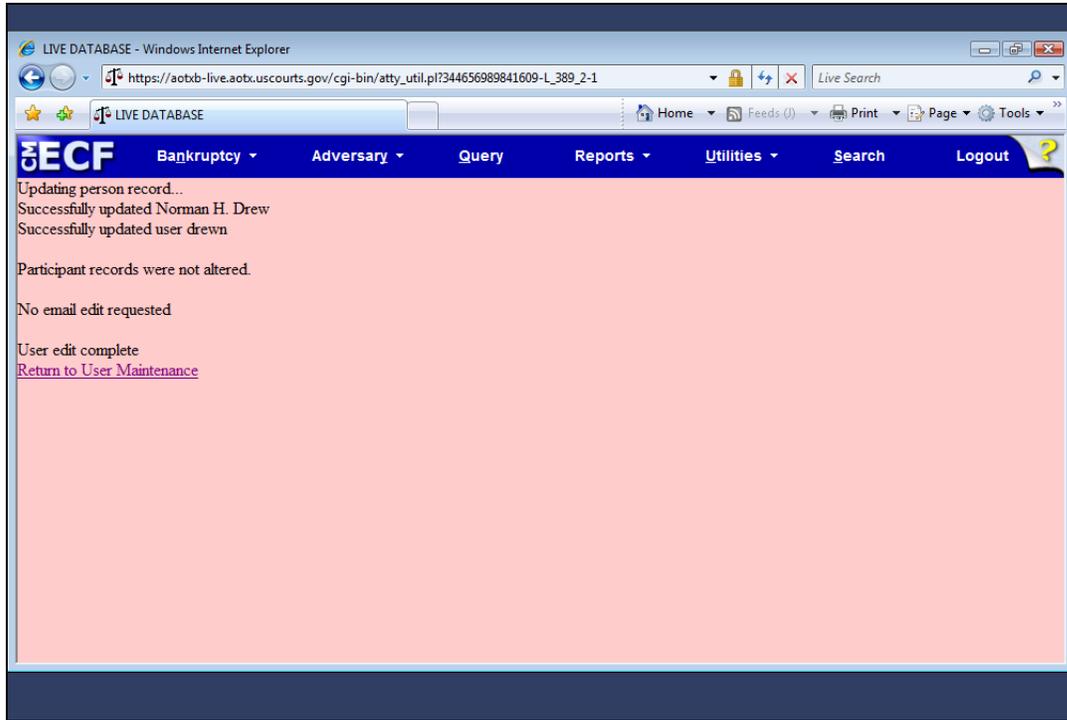
Slide 47

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



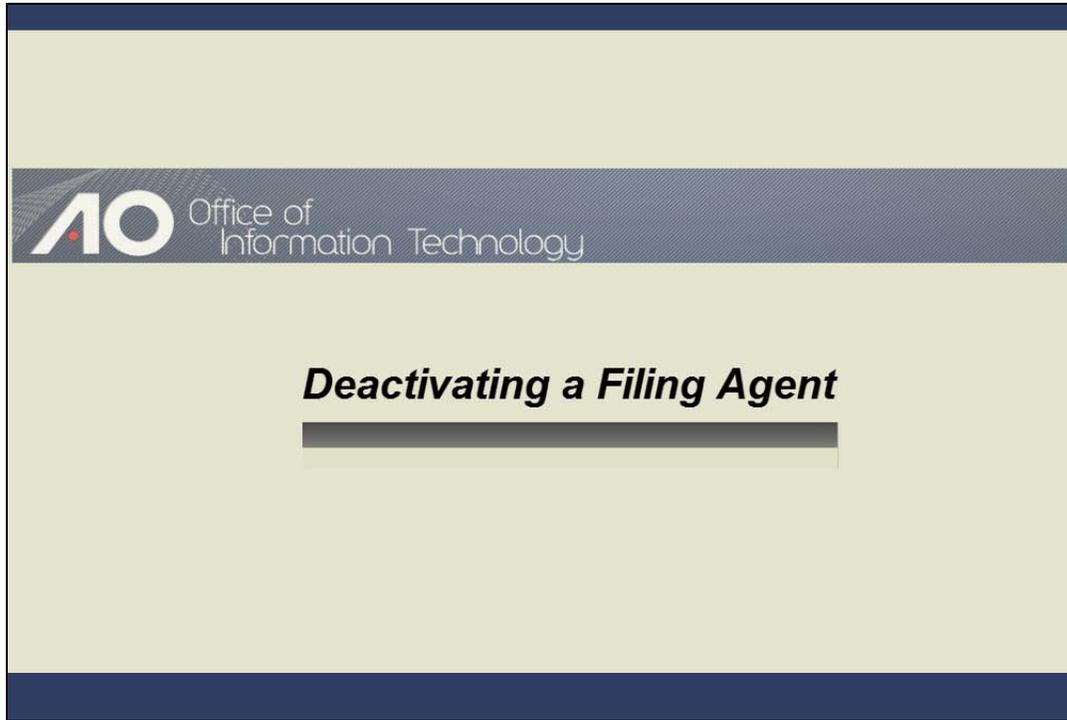
Slide 48

Slide notes:



Slide 49

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



DEACTIVATING A FILING AGENT

Slide notes:

The screenshot shows a web browser window with the URL [https://aotxb-live.aotb.uscourts.gov/cgi-bin/atty\\_util.pl](https://aotxb-live.aotb.uscourts.gov/cgi-bin/atty_util.pl). The page title is "LIVE DATABASE" and the navigation menu includes "Bankruptcy", "Adversary", "Query", "Reports", "Utilities", "Search", and "Logout". The main content area is titled "Maintain User Account" and contains the following fields:

- Last name: Drew
- First name: Norman
- Middle name: H.
- Generation: [empty]
- Title: [empty]
- Type aty: [empty]
- Office: Rodman & Associates, LLC
- Add Headers to PDF Documents
- Address 1: 8534 North Jefferson Avenue
- Address 2: [empty]
- Address 3: [empty]
- City: San Antonio
- State: TX
- Zip: 78233
- Country: [empty]
- County: BEXAR-TX
- Phone: 210-334-2225
- Fax: [empty]
- SSN / ITIN: [empty]
- Tax ID / EIN: [empty]
- Bar ID: TX44632
- Bar status: Active
- Mail group: [empty]
- Initials: [empty]
- DOB: [empty]
- AO code: [empty]
- Person end date: [empty]

Buttons at the bottom include "Email information...", "More user information...", "Submit", and "Clear".

Slide 51  
 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."

LIVE DATABASE - Windows Internet Explorer  
https://aotxb-live.aotb.uscourts.gov/cgi-bin/atty\_util.pl

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

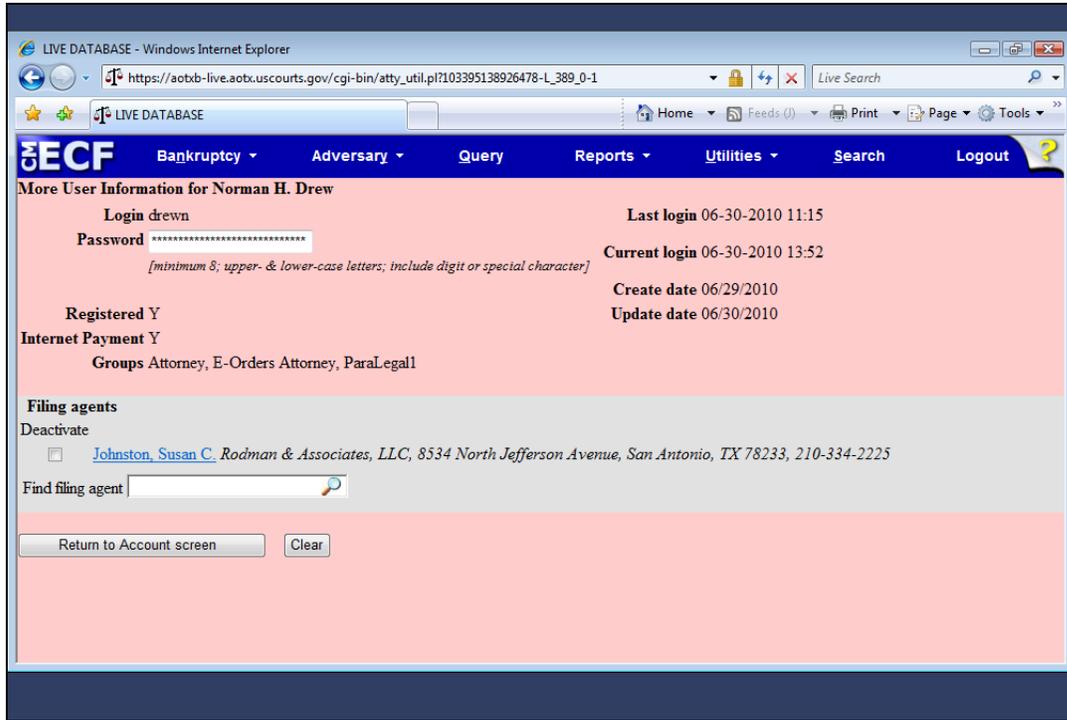
Maintain User Account

Last name Drew First name Norman  
Middle name H. Generation  
Title Type aty  
Office Rodman & Associates, LLC  Add Headers to PDF Documents  
Address 1 8534 North Jefferson Avenue  
Address 2  
Address 3  
City San Antonio State TX Zip 78233  
Country Country BEXAR-TX  
Phone 210-334-2225 Fax  
SSN / ITIN Tax ID / EIN  
Bar ID TX44632 Bar status Active Mail group  
Initials DOB AO code Person end date

Email information... More user information...

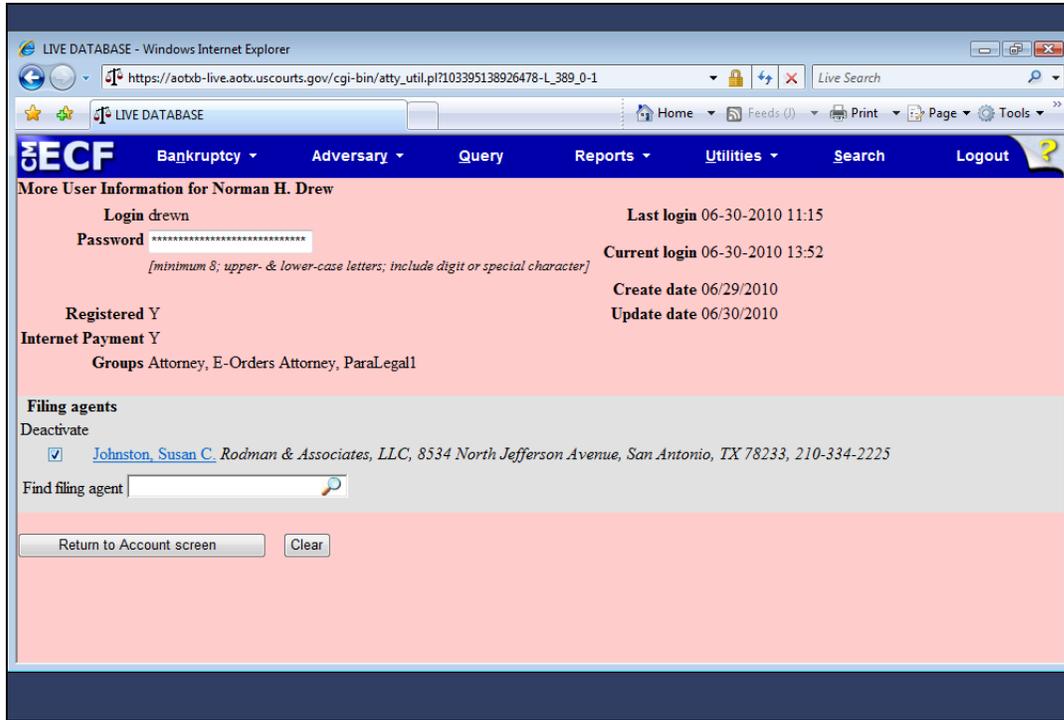
Submit Clear

Slide 52  
Slide notes:



Slide 53

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



Slide 54

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.

The screenshot shows a web browser window with the URL [https://aotxb-live.aotc.uscourts.gov/cgi-bin/atty\\_util.pl?103395138926478-L\\_389\\_0-1](https://aotxb-live.aotc.uscourts.gov/cgi-bin/atty_util.pl?103395138926478-L_389_0-1). The page title is "LIVE DATABASE". The navigation menu includes: Bankruptcy, Adversary, Query, Reports, Utilities, Search, and Logout. The main content area is titled "More User Information for Norman H. Drew" and contains the following details:

<b>Login</b> drewn	<b>Last login</b> 06-30-2010 11:15
<b>Password</b> [REDACTED]	<b>Current login</b> 06-30-2010 13:52
<small>[minimum 8; upper- &amp; lower-case letters; include digit or special character]</small>	<b>Create date</b> 06/29/2010
<b>Registered</b> Y	<b>Update date</b> 06/30/2010
<b>Internet Payment</b> Y	
<b>Groups</b> Attorney, E-Orders Attorney, ParaLegal1	

**Filing agents**  
Deactivate  
 [Johnston, Susan C. Rodman & Associates, LLC, 8534 North Jefferson Avenue, San Antonio, TX 78233, 210-334-2225](#)

Find filing agent

Buttons: Return to Account screen, Clear

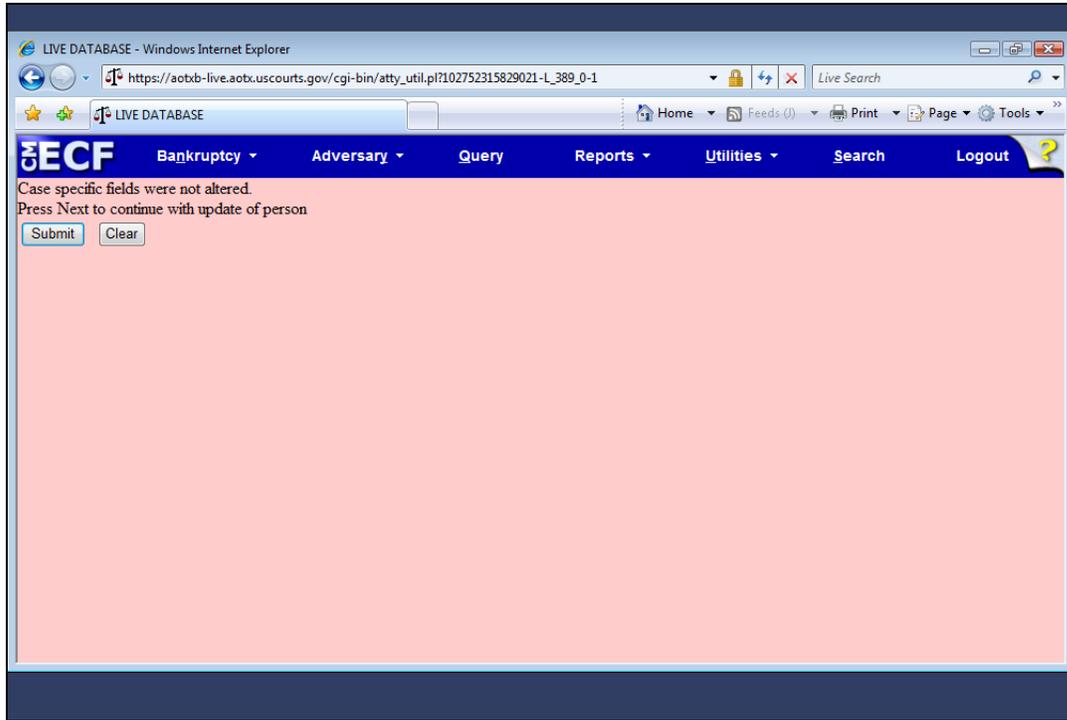
Slide 55  
Slide notes:

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

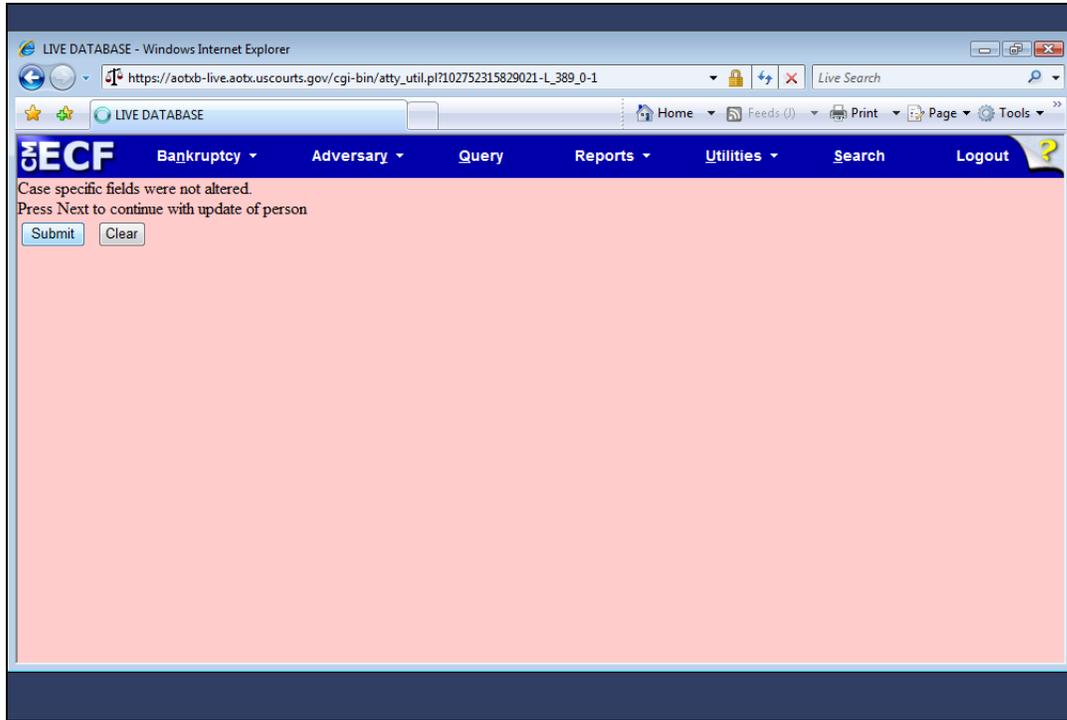
Maintain User Account

Last name: Drew First name: Norman  
 Middle name: H. Generation:   
 Title: Type aty:   
 Office: Rodman & Associates, LLC  Add Headers to PDF Documents  
 Address 1: 8534 North Jefferson Avenue  
 Address 2:   
 Address 3:   
 City: San Antonio State: TX Zip: 78233  
 Country: County: BEXAR-TX  
 Phone: 210-334-2225 Fax:   
 SSN / ITIN: Tax ID / EIN:   
 Bar ID: TX44632 Bar status: Active Mail group:   
 Initials: DOB: AO code: Person end date:   
 Email information... More user information...  
 Submit Clear

Slide 56  
 Slide notes:

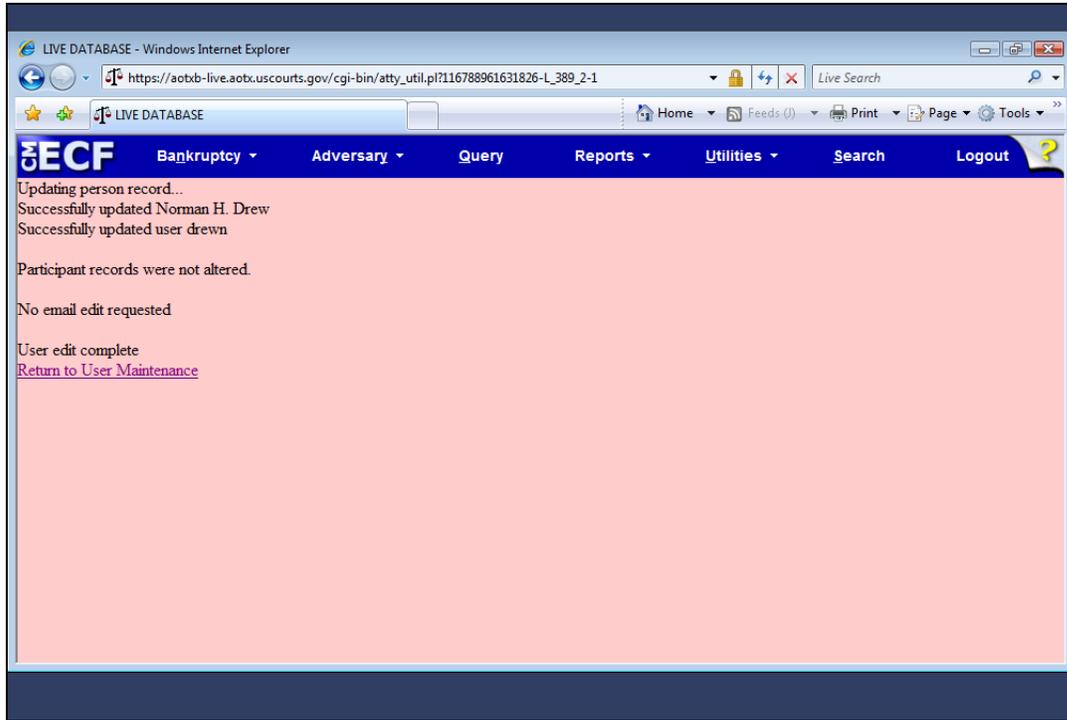


Slide 57  
Slide notes:



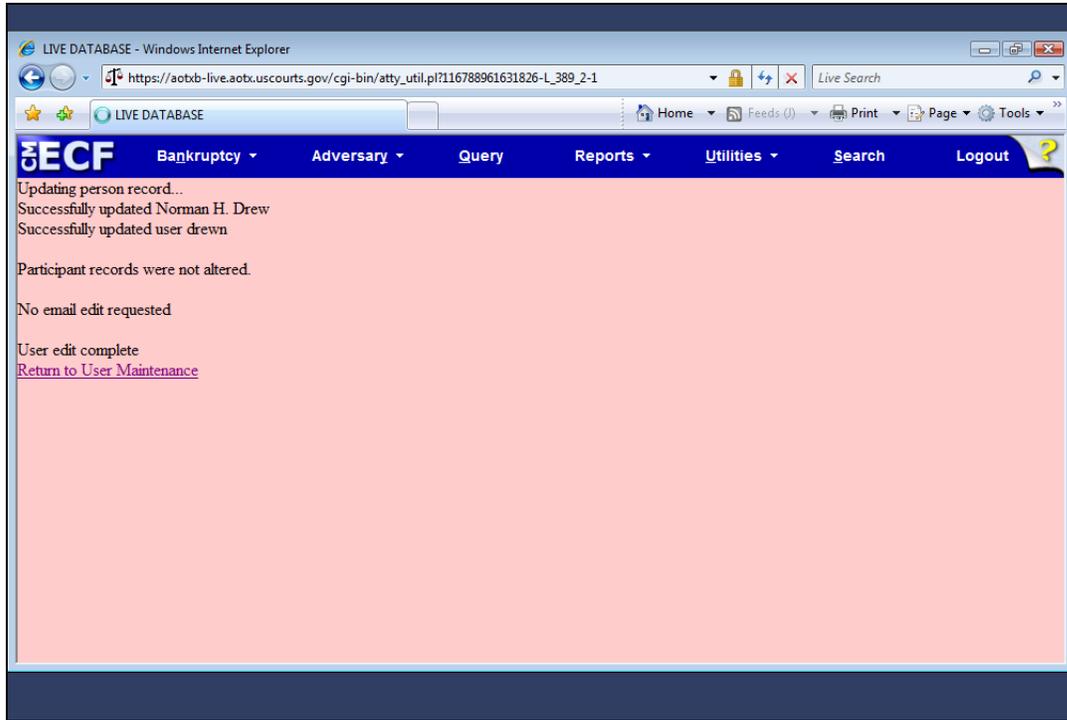
Slide 58

Slide notes:



Slide 59

Slide notes: My attorney person record has been updated. Now, to re-associate the filing agent with the attorney, I click the "Return to User Maintenance" hyperlink.



Slide 60

Slide notes:

The screenshot shows a web browser window titled "LIVE DATABASE - Windows Internet Explorer" with the URL "https://aotxb-live.aotb.uscourts.gov/cgi-bin/atty\_util.pl". The page header includes the ECF logo and navigation links: Bankruptcy, Adversary, Query, Reports, Utilities, Search, and Logout. The main content area is titled "Maintain User Account" and contains a form with the following fields and values:

Last name	Drew	First name	Norman
Middle name	H.	Generation	
Title		Type aty	
Office	Rodman & Associates, LLC	<input checked="" type="checkbox"/> Add Headers to PDF Documents	
Address 1	8534 North Jefferson Avenue		
Address 2			
Address 3			
City	San Antonio	State	TX
		Zip	78233
Country		County	
Phone	210-334-2225	Fax	
SSN / ITIN		Tax ID / EIN	
Bar ID	TX44632	Bar status	Active
Initials		Mail group	
		DOB	
		AO code	
		Person end date	

At the bottom of the form, there are buttons for "Email information...", "More user information...", "Submit", and "Clear".

Slide 61

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

LIVE DATABASE - Windows Internet Explorer  
https://aotxb-live.aotb.uscourts.gov/cgi-bin/atty\_util.pl

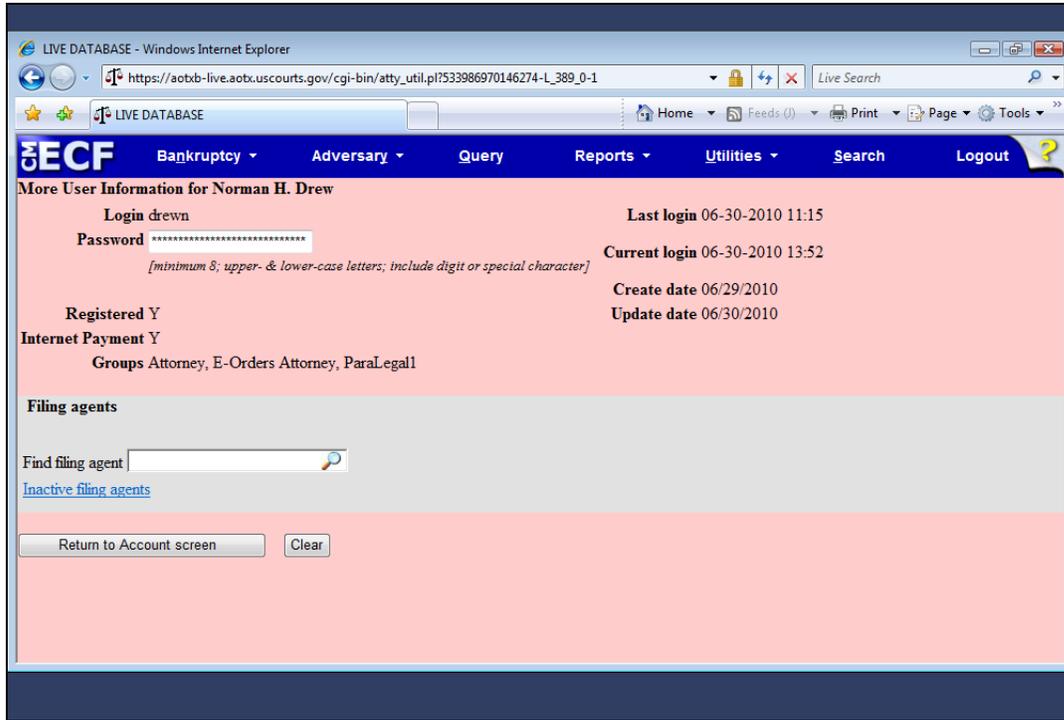
**ECF** Bankruptcy Adversary Query Reports Utilities Search Logout

Maintain User Account

Last name Drew First name Norman  
Middle name H. Generation  
Title Type aty  
Office Rodman & Associates, LLC  Add Headers to PDF Documents  
Address 1 8534 North Jefferson Avenue  
Address 2  
Address 3  
City San Antonio State TX Zip 78233  
Country Country BEXAR-TX  
Phone 210-334-2225 Fax  
SSN / ITIN Tax ID / EIN  
Bar ID TX44632 Bar status Active Mail group  
Initials DOB AO code Person end date

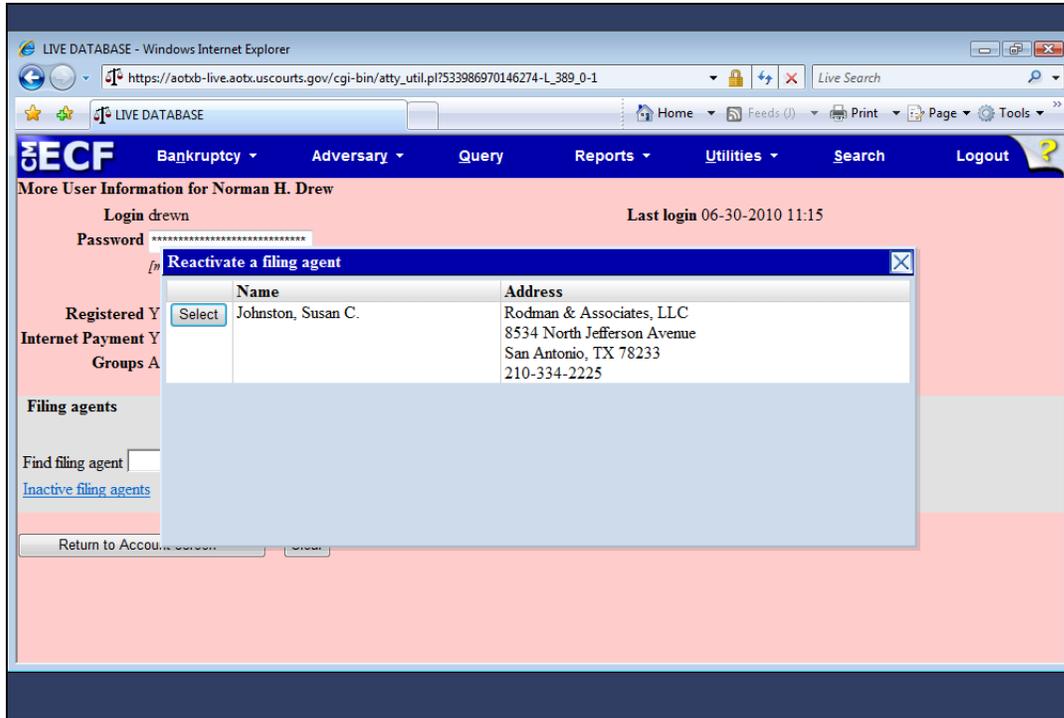
Email information... More user information...  
Submit Clear

Slide 62  
Slide notes:

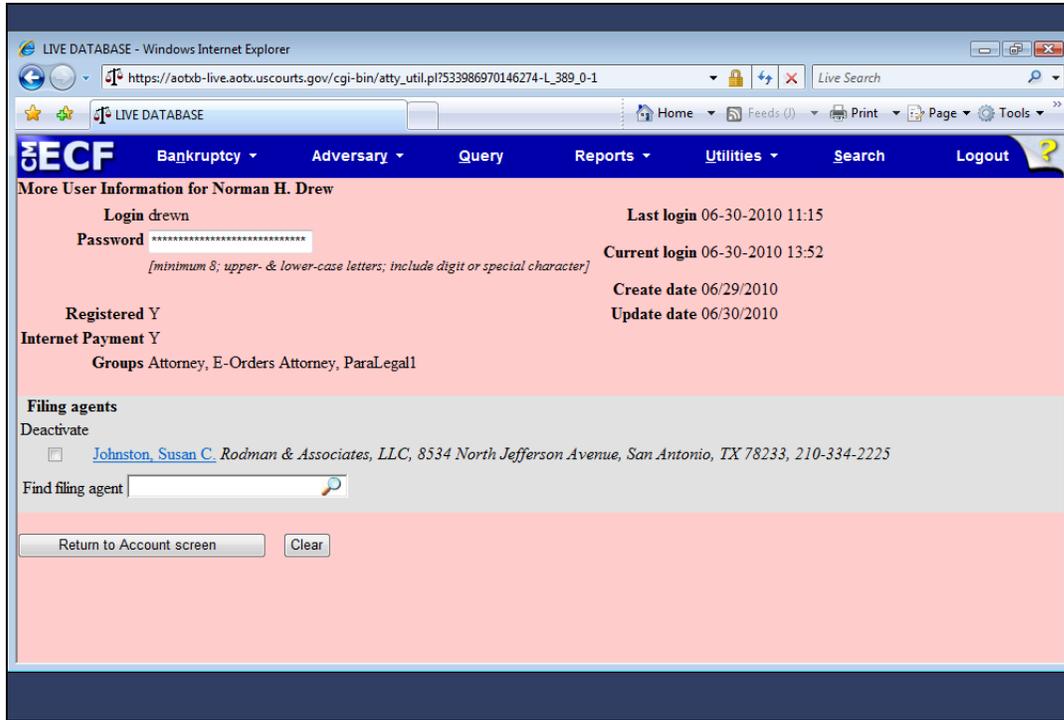


REACTIVATING A FILING AGENT

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.



Slide 64  
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.



Slide 65  
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.

LIVE DATABASE - Windows Internet Explorer  
https://aotxb-live.aotb.uscourts.gov/cgi-bin/atty\_util.pl?533986970146274-L\_389\_0-1

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

**More User Information for Norman H. Drew**

Login drewn Last login 06-30-2010 11:15  
Password [redacted] Current login 06-30-2010 13:52  
*[minimum 8; upper- & lower-case letters; include digit or special character]* Create date 06/29/2010  
Registered Y Update date 06/30/2010  
Internet Payment Y  
Groups Attorney, E-Orders Attorney, ParaLegal

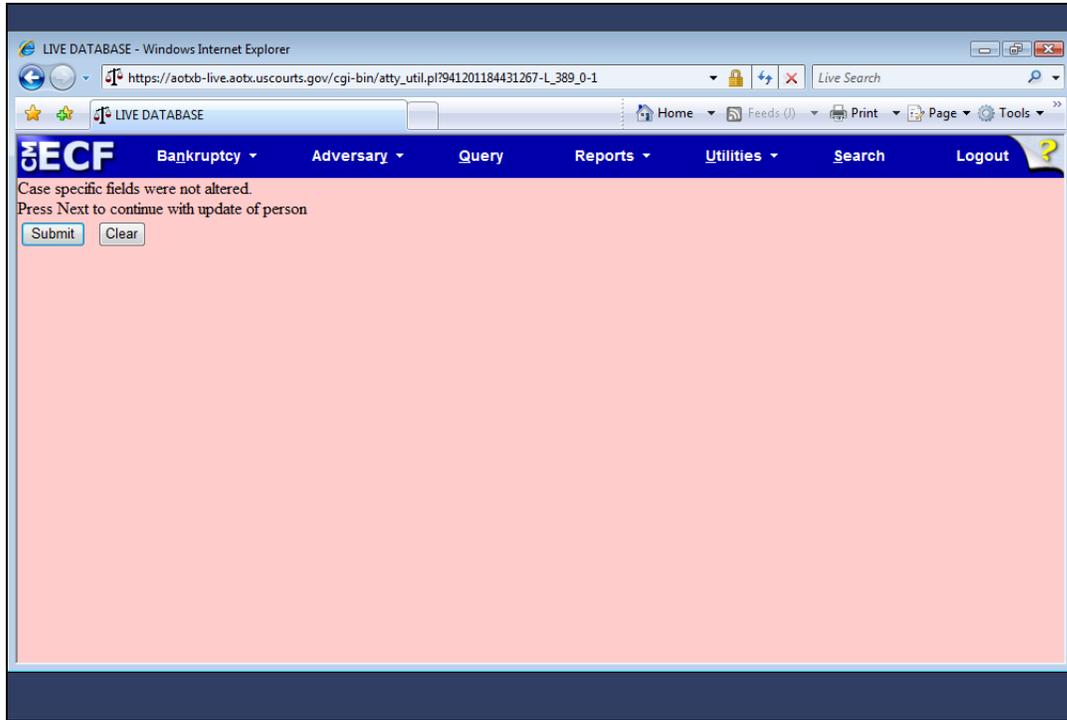
**Filing agents**  
Deactivate  
 [Johnston, Susan C. Rodman & Associates, LLC, 8534 North Jefferson Avenue, San Antonio, TX 78233, 210-334-2225](#)  
Find filing agent

Slide 66  
Slide notes:

The screenshot shows a web browser window with the URL [https://aotxb-live.aotb.uscourts.gov/cgi-bin/atty\\_util.pl?996960623235184-L\\_9999\\_1](https://aotxb-live.aotb.uscourts.gov/cgi-bin/atty_util.pl?996960623235184-L_9999_1). The page title is "LIVE DATABASE - Windows Internet Explorer". The browser's address bar shows the URL. The page content includes a navigation menu with "Bankruptcy", "Adversary", "Query", "Reports", "Utilities", "Search", and "Logout". The main heading is "Maintain User Account". The form fields are as follows:

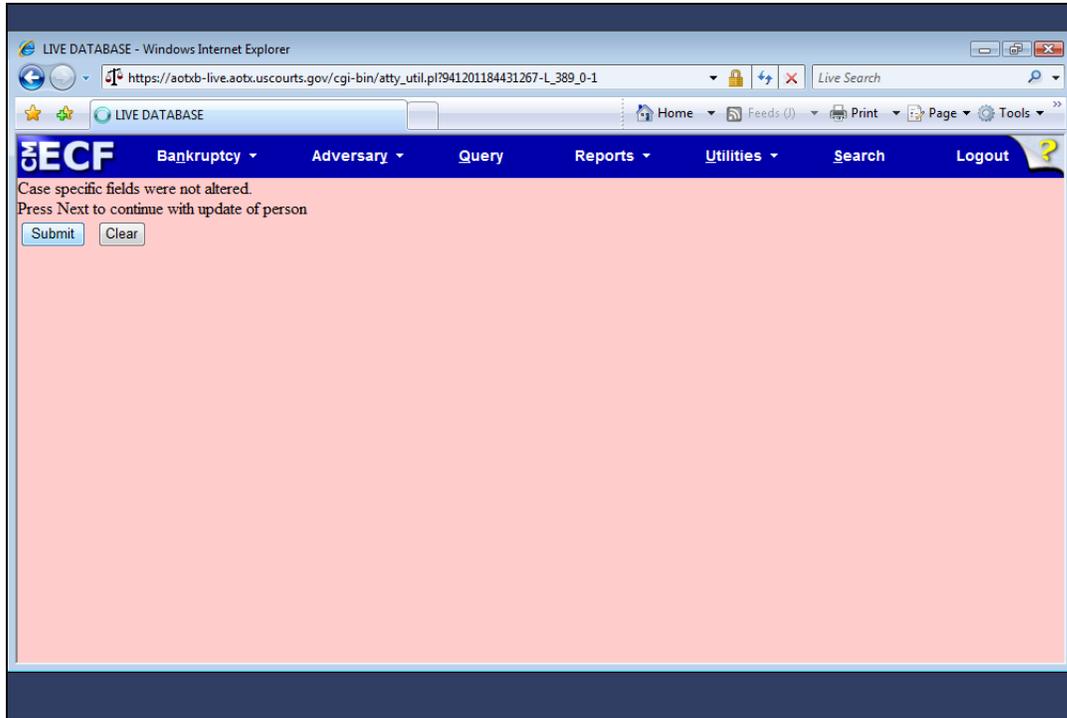
Last name	Drew	First name	Norman
Middle name	H.	Generation	
Title		Type aty	
Office	Rodman & Associates, LLC	<input checked="" type="checkbox"/>	Add Headers to PDF Documents
Address 1	8534 North Jefferson Avenue		
Address 2			
Address 3			
City	San Antonio	State	TX
		Zip	78233
Country		County	BEXAR-TX
Phone	210-334-2225	Fax	
SSN / ITIN		Tax ID / EIN	
Bar ID	TX44632	Bar status	Active
Initials		Mail group	
		AO code	
		Person end date	
<input type="button" value="Email information..."/>		<input type="button" value="More user information..."/>	
<input type="button" value="Submit"/>	<input type="button" value="Clear"/>		

Slide 67  
Slide notes:



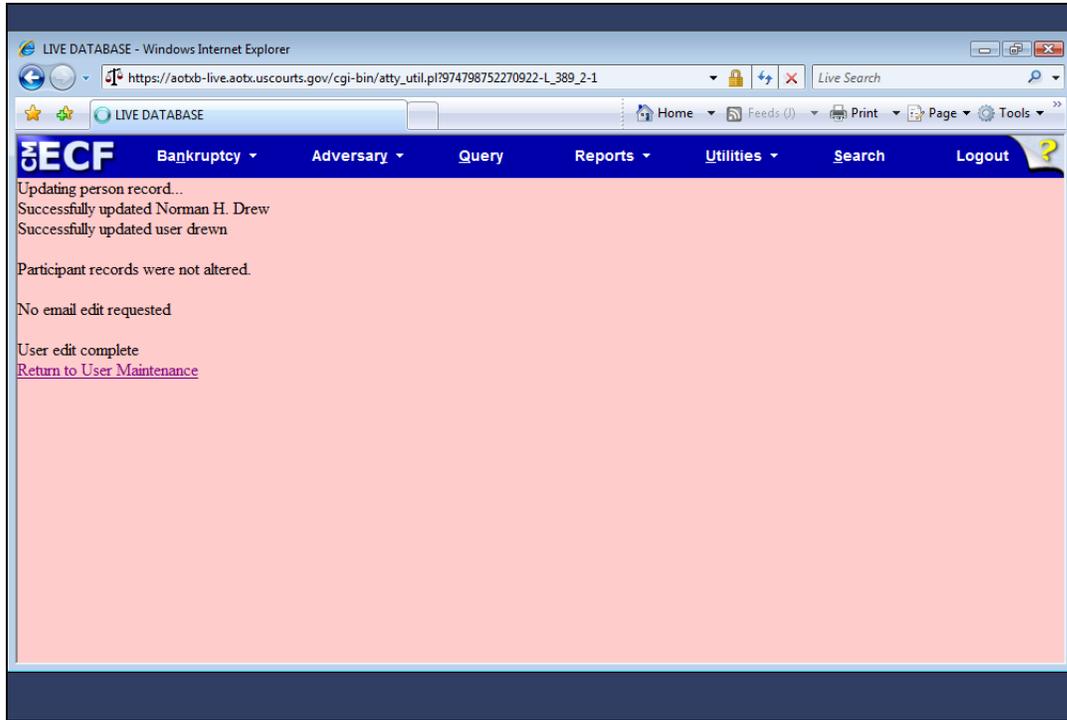
Slide 68

Slide notes:



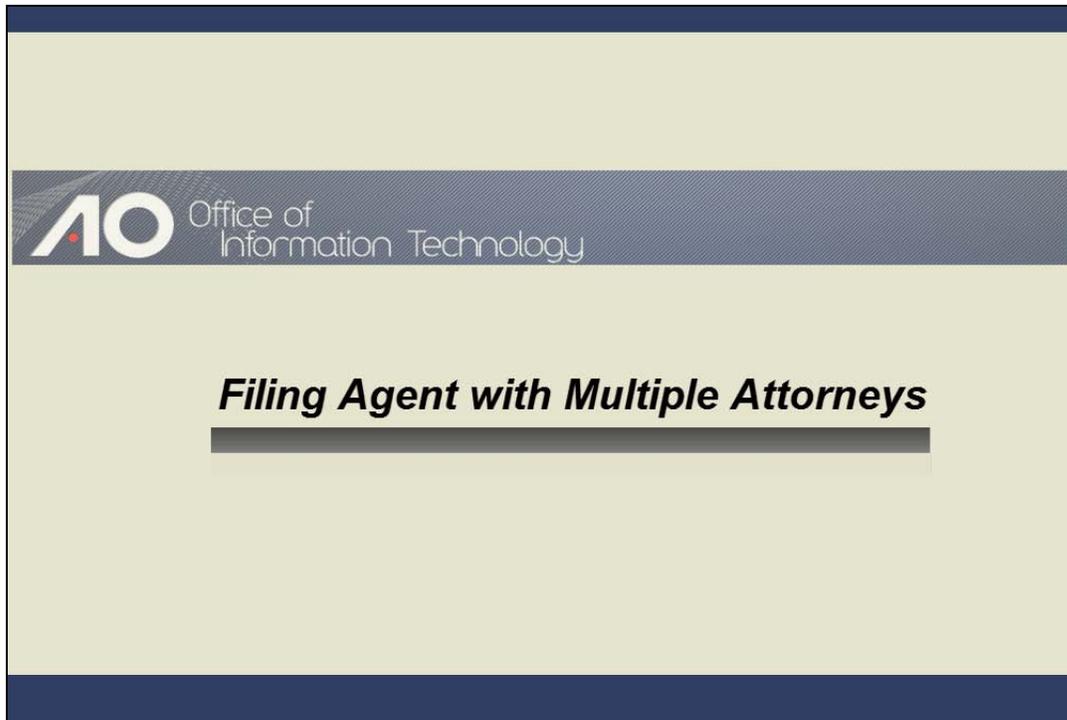
Slide 69

Slide notes:



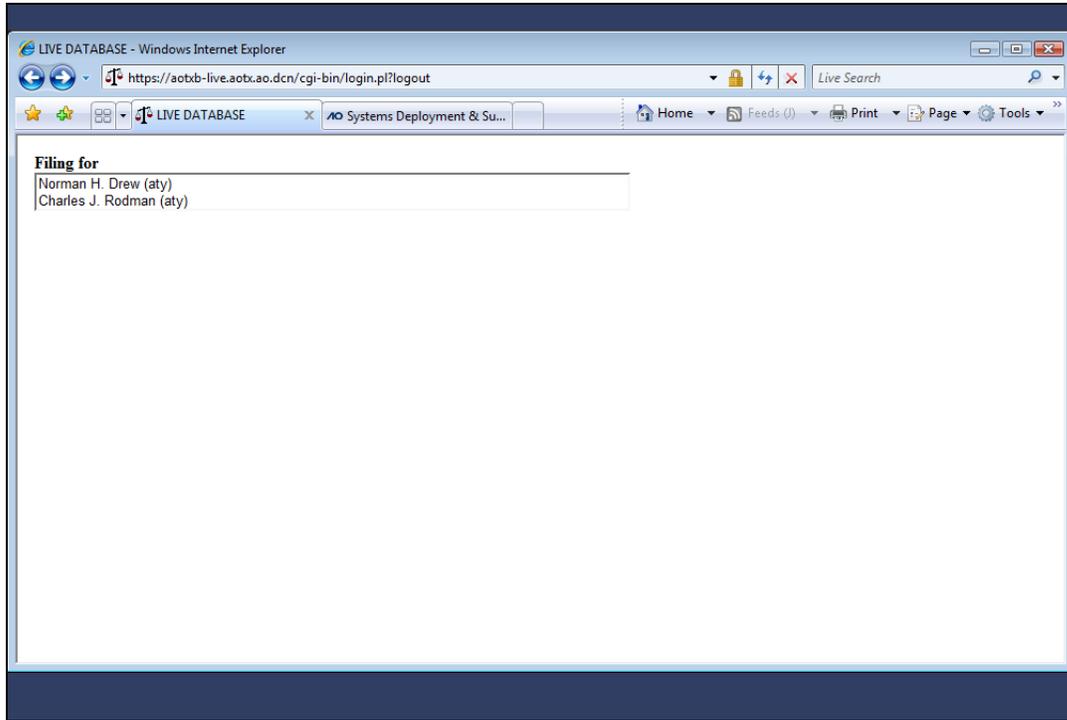
Slide 70

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



FILING AGENT WITH MULTIPLE ATTORNEYS

Slide notes:

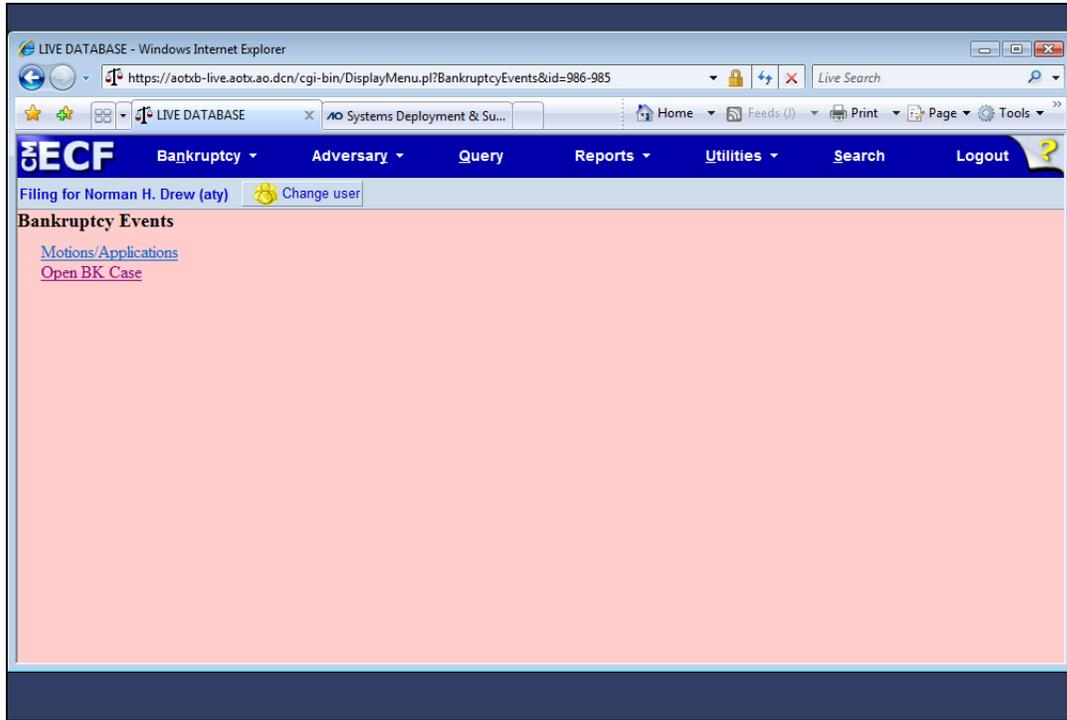


Slide 72  
Slide notes: If a filing agent has been linked to two or more attorneys, the first screen that appears after the agent logs in requires the agent to select the attorney for whom he or she is filing. Watch what happens when the attorney, Norman Drew, is selected.



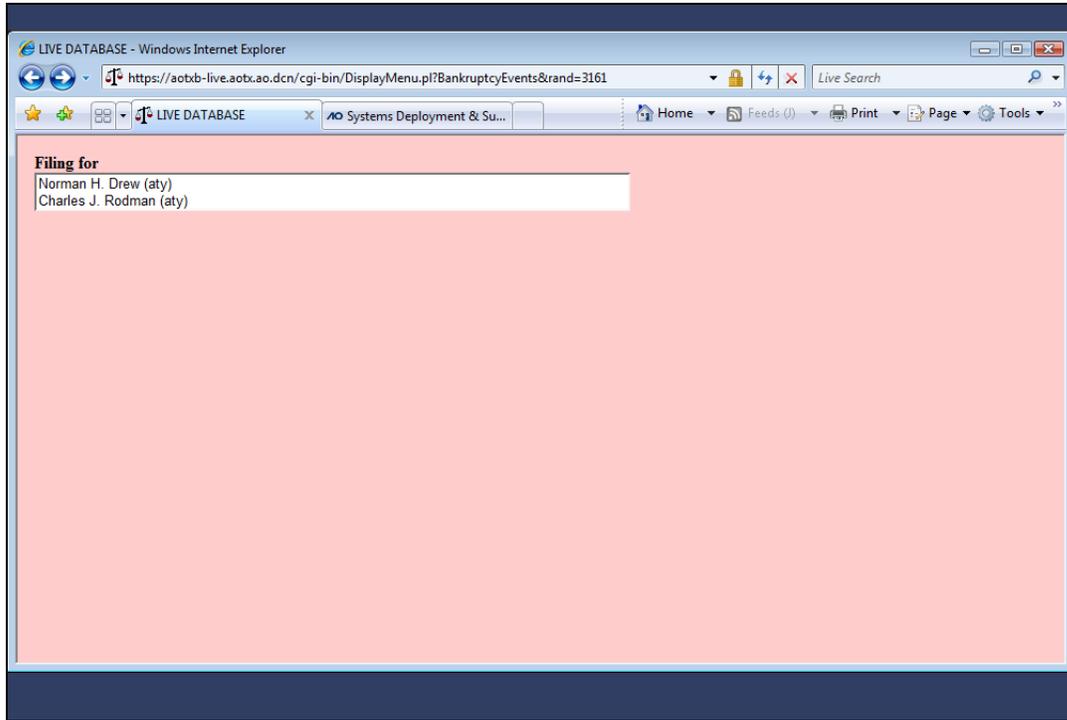
Slide 73

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.



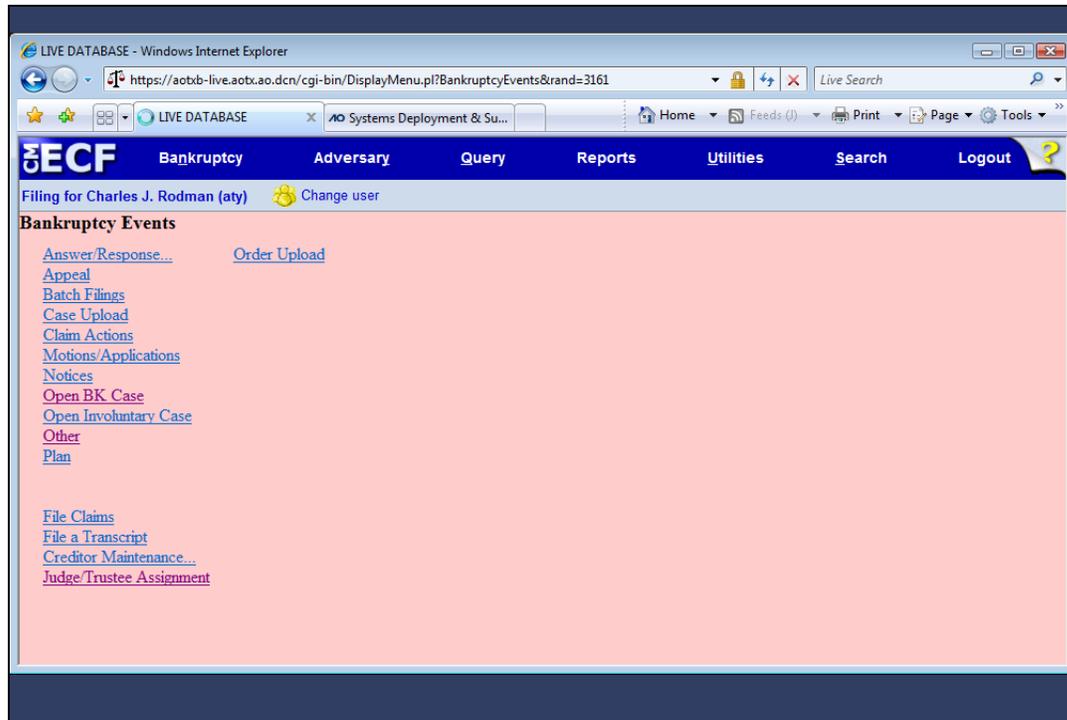
Slide 74

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...



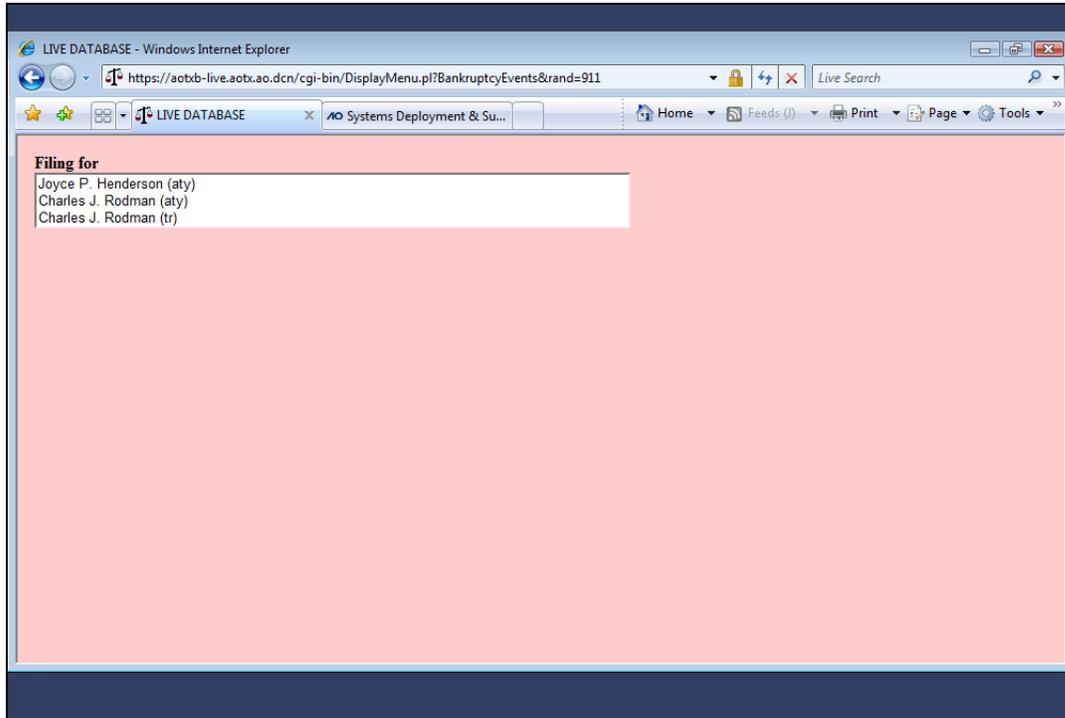
Slide 75

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



Slide 76

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.



Slide 77

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.

**Transaction Log**  
Report Period 07/29/2010 - 07/29/2010

Id	Date	Case Number	Text
31795	07/29/2010 11:37:16	10-10130	Opened New BK Case 10-10130
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 Number of Transactions: 4

Slide 78  
 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**

You should now be able to:

- Explain the features of filing agents.
- Create a filing agent in CM/ECF.
- Update permissions for a filing agent.
- Deactivate and reactivate a filing agent.

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.