

# Filing Agents

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; there was no way to link multiple accounts to the same trustee or attorney. To compensate, the court created separate accounts to allow staff to file on behalf of the trustee/attorney. (Designated as First Name-INI)

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.

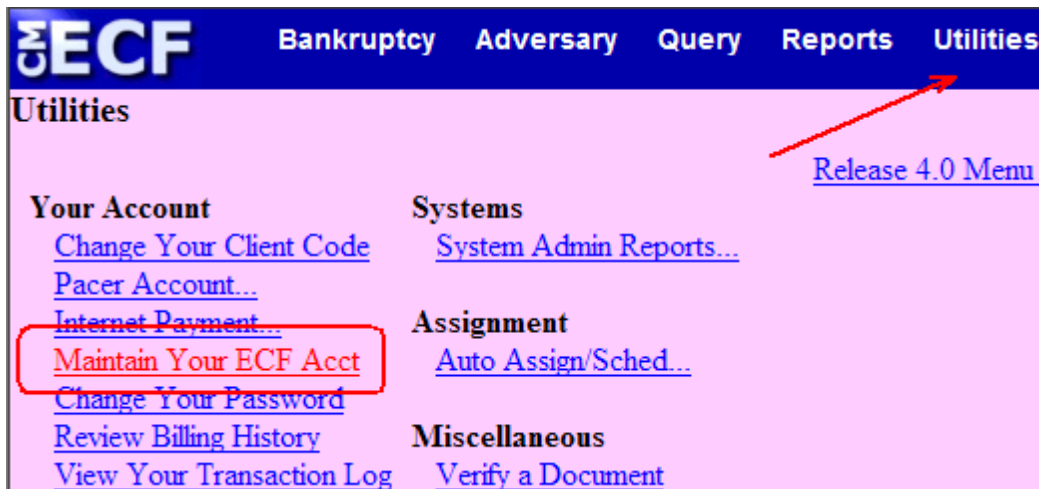
Filing Agents -

- 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 electronic notice directly. 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'

## Adding Filing Agents

The attorney or trustee must login.

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



The screenshot shows the CM/ECF 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 'Maintain Your ECF Acct' option. A red arrow points to the 'Utilities' menu item in the top navigation bar. The 'Release 4.0 Menu' link is also visible in the top right corner of the Utilities menu.

Utilities	
<b>Your Account</b>	<b>Systems</b>
<a href="#">Change Your Client Code</a>	<a href="#">System Admin Reports...</a>
<a href="#">Pacer Account...</a>	
<a href="#">Internet Payment...</a>	<b>Assignment</b>
<a href="#">Maintain Your ECF Acct</a>	<a href="#">Auto Assign/Sched...</a>
<a href="#">Change Your Password</a>	
<a href="#">Review Billing History</a>	<b>Miscellaneous</b>
<a href="#">View Your Transaction Log</a>	<a href="#">Verify a Document</a>

Click 'More user information...'

**Maintain User Account**

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

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


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**

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

[See the Utilities menu for the "Change Your Pas

**Filing agents**

Find filing agent White 

Return to Account screen Clear

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' - including the 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**

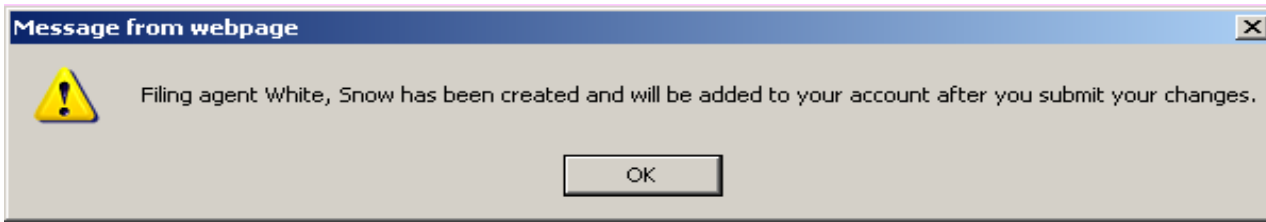
**Phone**

**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**

## Selecting an existing Filing Agent

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

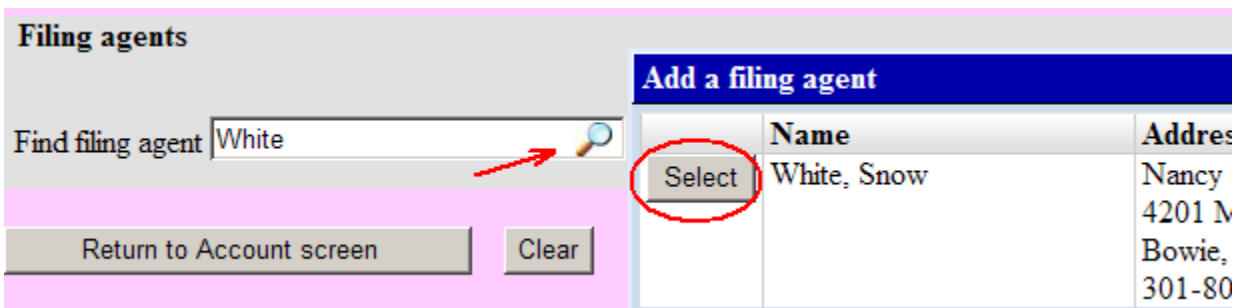
Type the last name of the agent you wish to find and click the **magnifying glass**

Click **Select**

Click **Return to Account Screen**

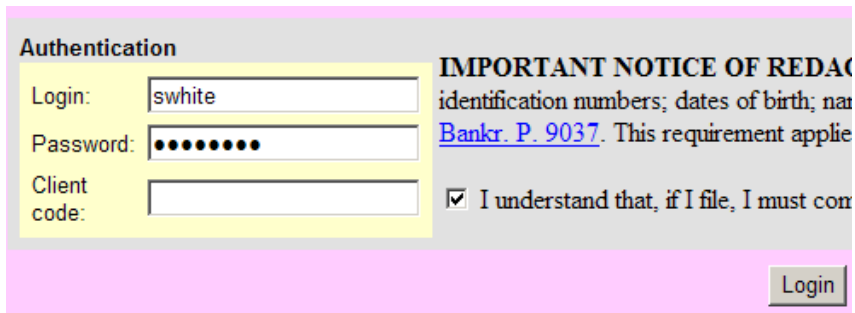
Click **Submit**

Click **Submit**



## Docketing as a Filing Agent

Login with your login and password.



The screenshot shows the authentication section of a web interface. On the left, there are three input fields: 'Login:' with the text 'swhite', 'Password:' with ten black dots, and 'Client code:' which is empty. To the right of these fields is a section titled 'IMPORTANT NOTICE OF REDAC' followed by text about identification numbers and dates of birth, and a link to 'Bankr. P. 9037'. Below the notice is a checked checkbox with the text 'I understand that, if I file, I must con'. At the bottom right of the form is a 'Login' button.

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.)



The screenshot shows the top navigation bar of the ECF system with the logo and links for 'Bankruptcy', 'Adversary', 'Query', and 'Reports'. Below the navigation bar, there is a dropdown menu showing 'Filing for Nancy (Gblt) Spencer Grigsby (tr)'. To the right of the dropdown is a 'Change user' button with a yellow gear icon. A red arrow points to the 'Change user' button.

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**

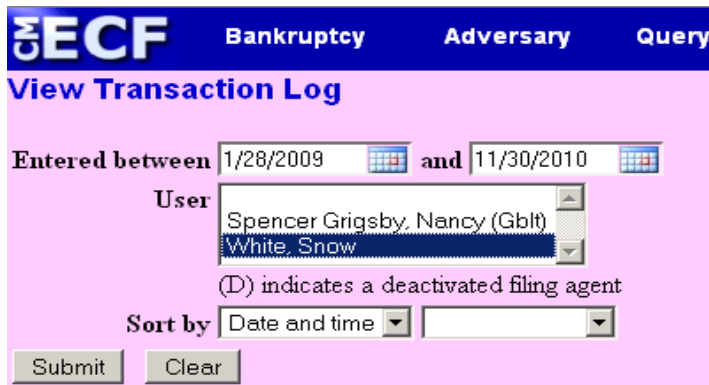
- [CME/ECF Login](#)
- [Change Your Client Code](#)
- [Pacer Account...](#)
- [Internet Payment...](#)
- [Maintain Your ECF Acct](#)
- [Change Your Password](#)
- [Review Billing History](#)
- [View Your Transaction Log](#)

**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

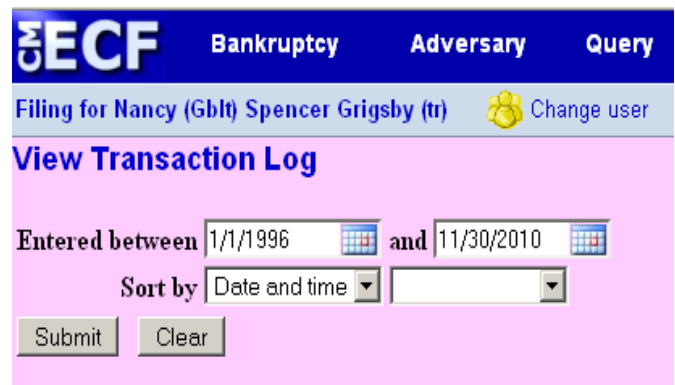
- Spencer Grigsby, Nancy (Gblt)
- White, Snow

(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

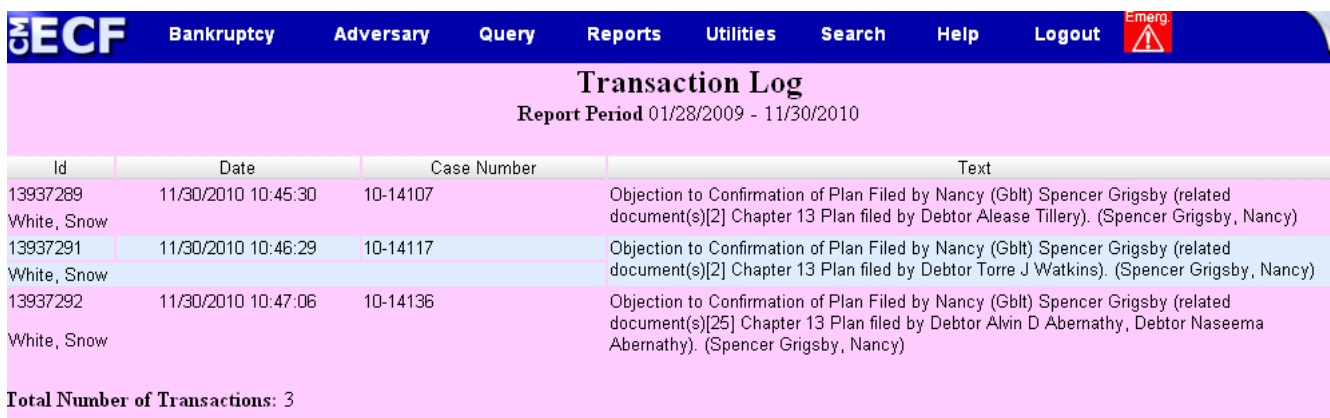
**View Transaction Log**

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