

The slide features a dark blue header bar at the top with the text "Filing Agents for Attorneys & Trustees" in white. Below this is a light beige background. A dark blue horizontal band contains the "AO" logo (with a red dot) and the text "Office of Information Technology" in white. The main title "Filing Agents for Attorneys & Trustees" is centered in a bold, italicized black font, with a thick black horizontal line underneath it. A dark blue footer bar is at the bottom.

WELCOME
Slide notes:

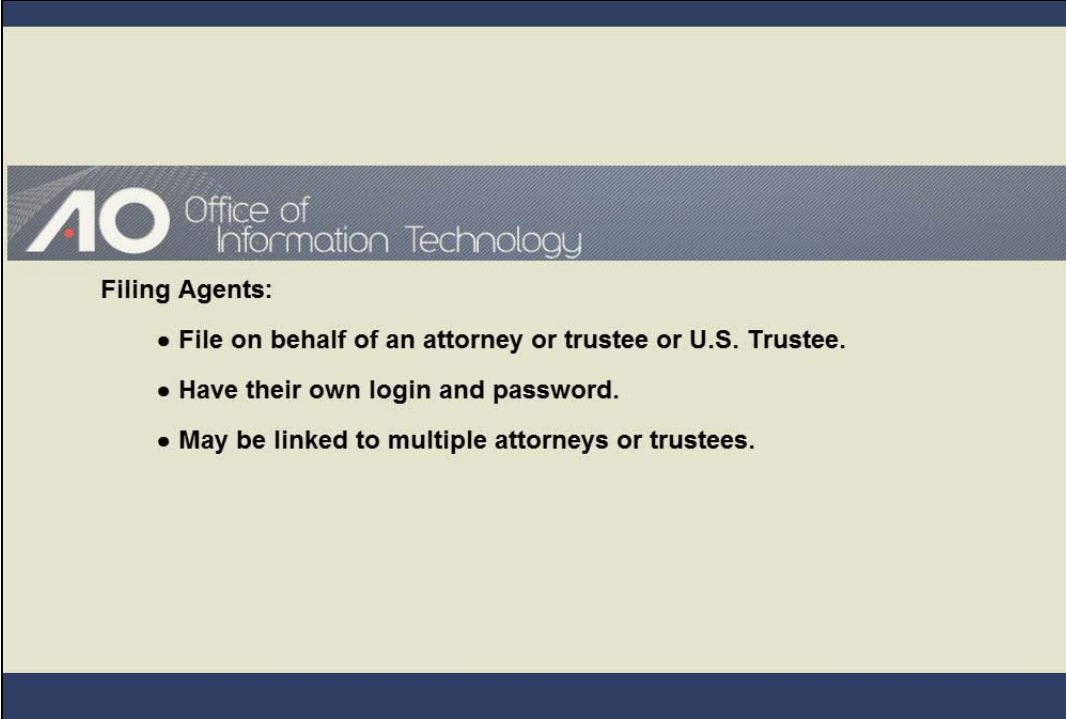
Objectives

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

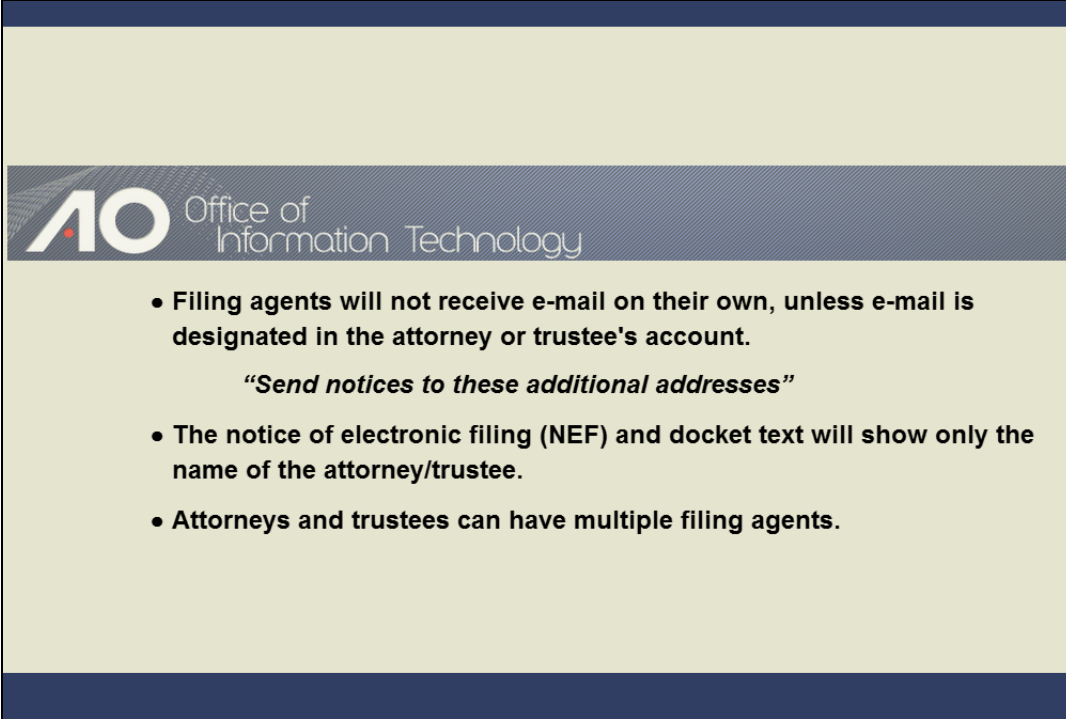
Filing Agents:

- **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.

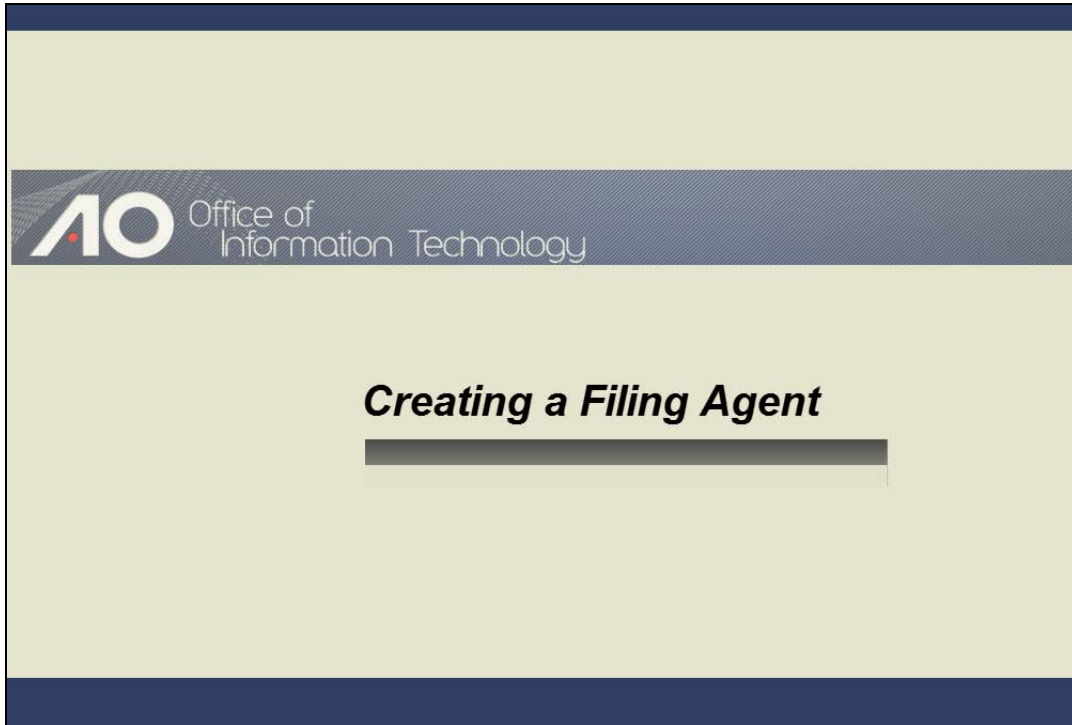
AO Office of
Information Technology

- **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

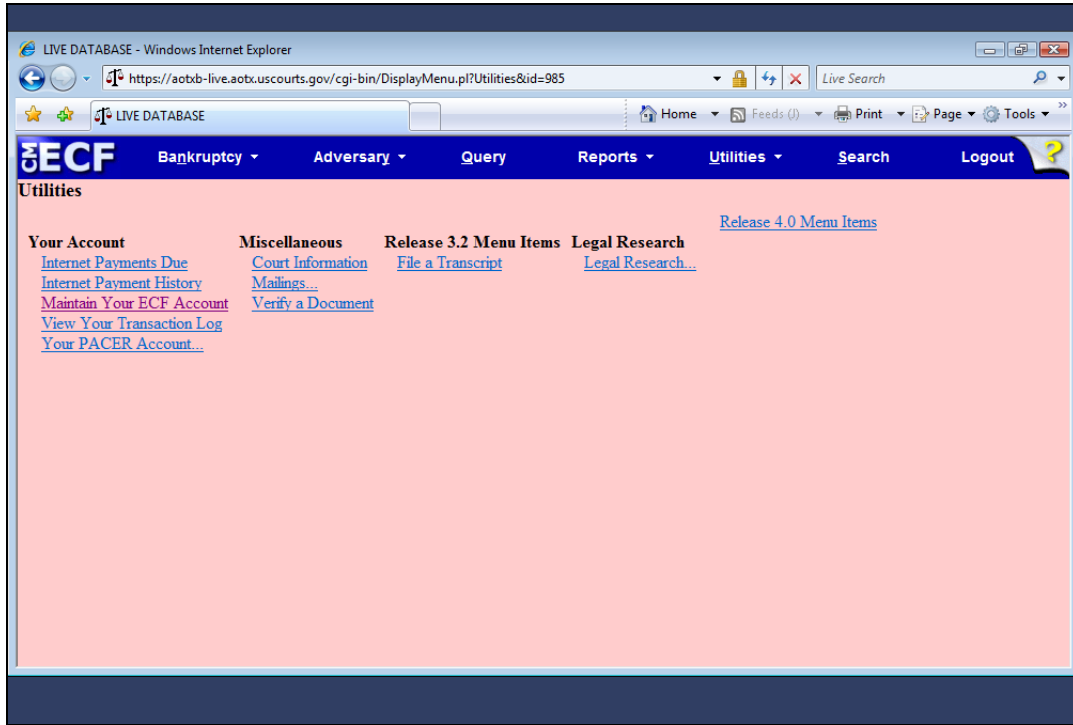
Slide notes: Some courts will allow you, as an attorney or trustee, to create and edit filing agents. The following sections of this module will demonstrate the steps to do this when logged into CM/ECF as the attorney, Norman Drew.

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.

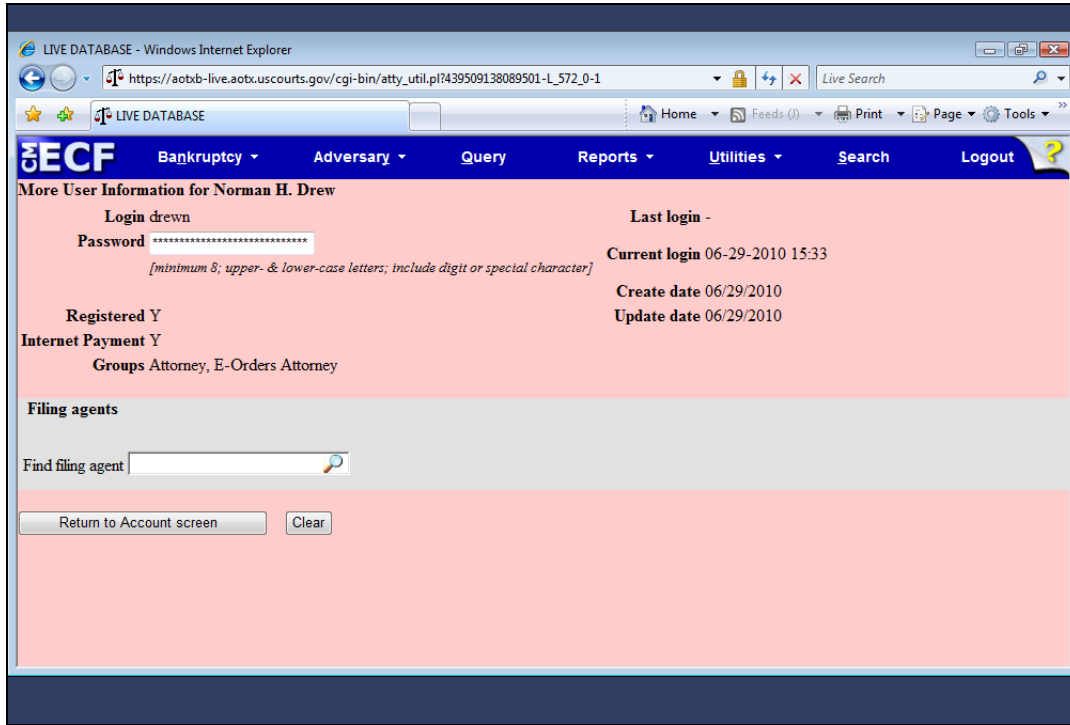
ECF Bankruptcy Adversary Query Reports Utilities Search Logout

Maintain User Account

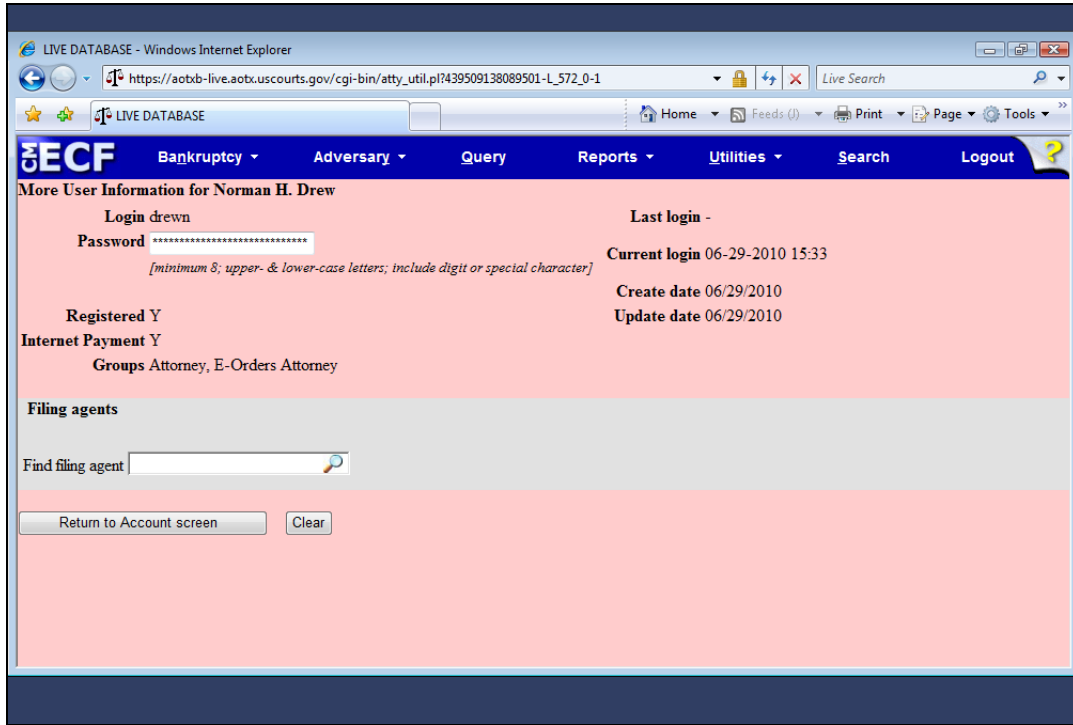
Last name: Drew First name: Norman
 Middle name: H. Generation:
 Title: Type aty
 Office: Rodman & Associates, LLC Add Headers to PDF Documents
 Address 1: 8534 North Jefferson Avenue
 Address 2:
 Address 3:
 City: San Antonio State: TX Zip: 78233
 Country: County: BEXAR-TX
 Phone: 210-334-2225 Fax:
 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 9

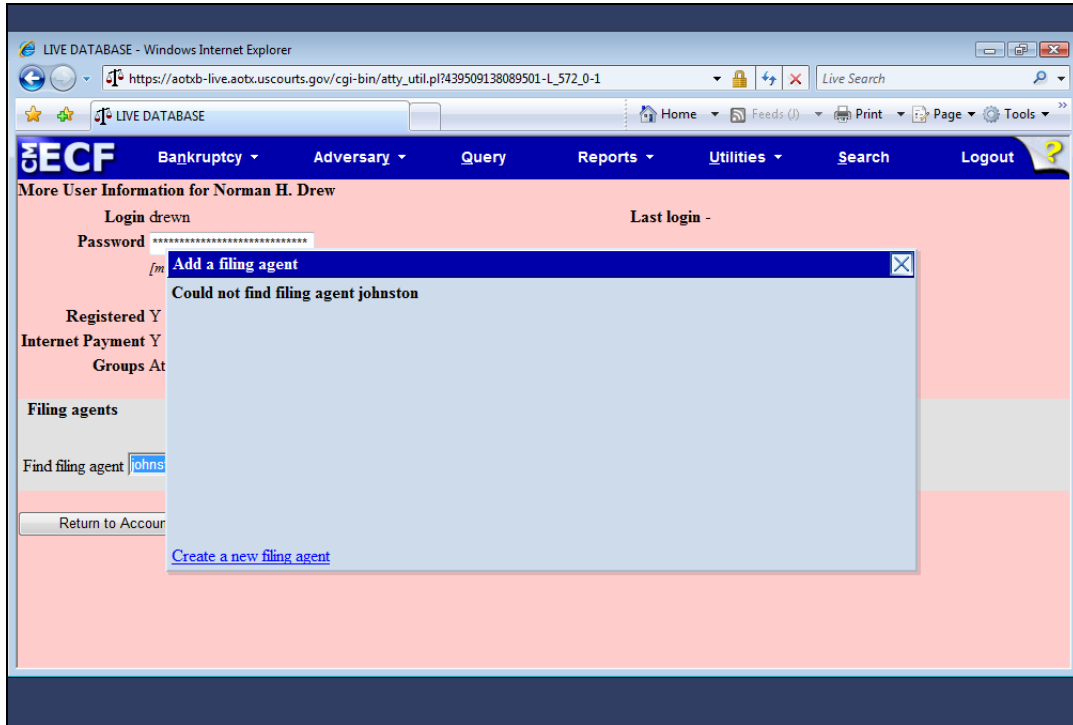
Slide notes: Next, I'll click "More user information," which is where filing agent records are maintained.



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.

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 titled "Filing Agent Information" and contains a form with the following fields:

- 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:

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^Vu
[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^V6 (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:

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**

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 with the address bar displaying `https://aotxb-live.aotb.uscourts.gov/cgi-bin/agt_util.pl?name=johnston`. The page title is "LIVE DATABASE". The form contains the following fields and values:

- Login:** johnstons
- Password:** Johnston2010
[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 two buttons: "Submit" and "Clear". The browser's status bar at the bottom shows "Done", "Internet | Protected Mode: Off", and "100%".

Slide 18

Slide notes: ...and click SUBMIT.

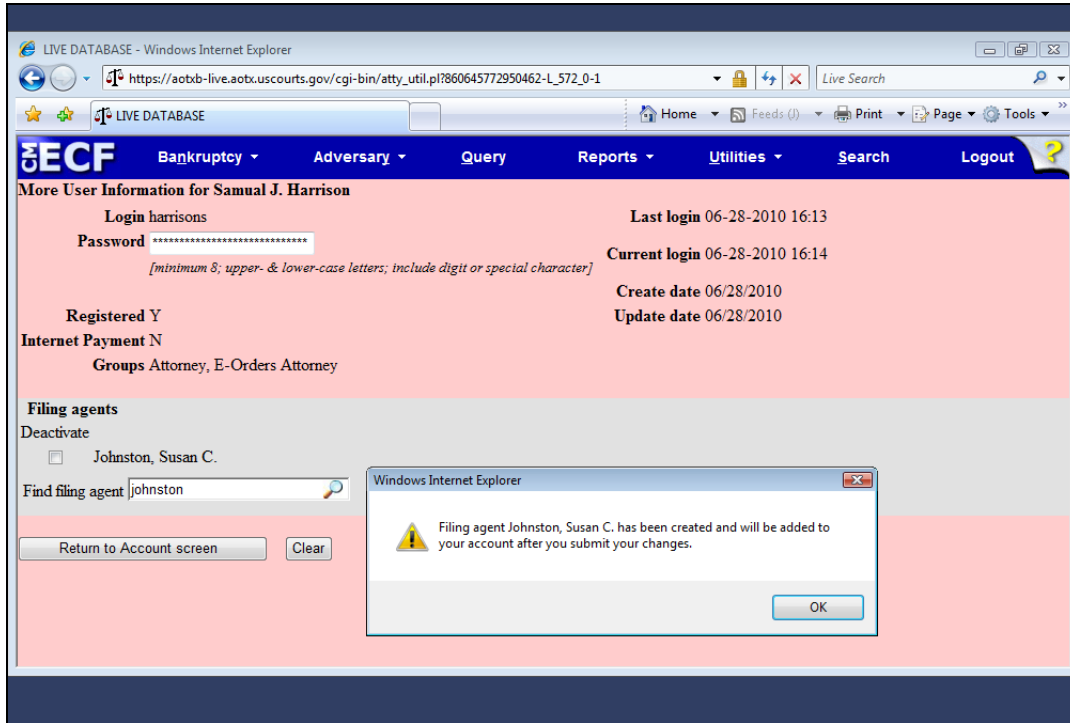
The screenshot shows a Windows Internet Explorer browser window with the address bar displaying https://aotxb-live.aotx.uscourts.gov/cgi-bin/agt_util.pl?name=johnston. The page title is "LIVE DATABASE". The form contains the following fields:

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

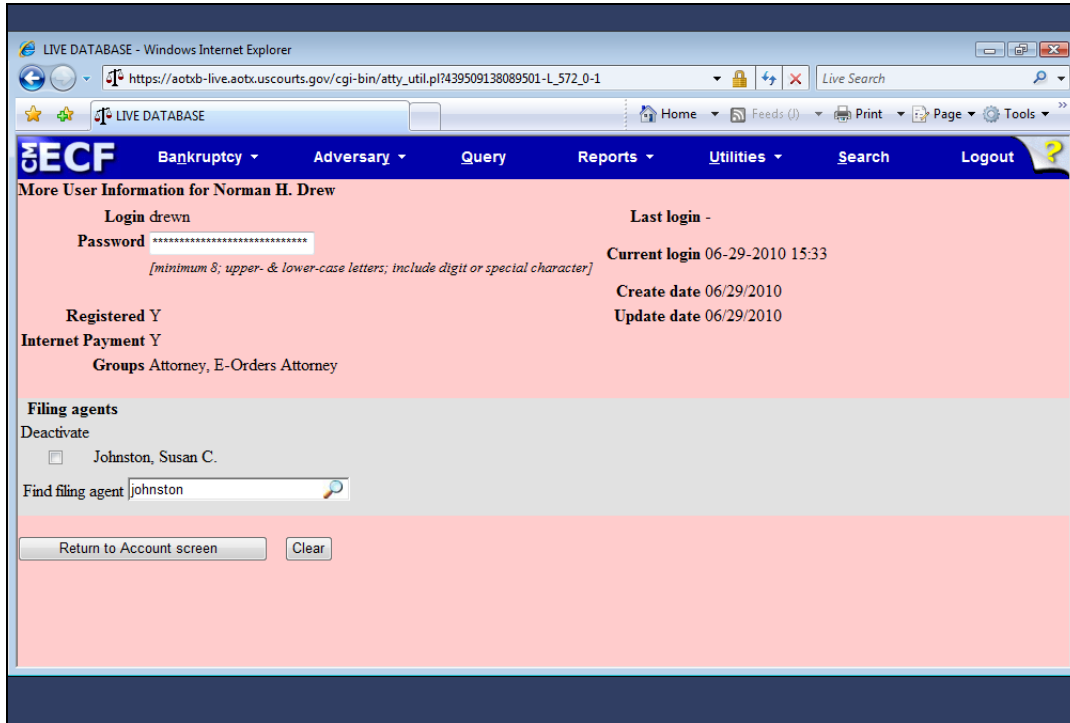
Slide 19

Slide notes:



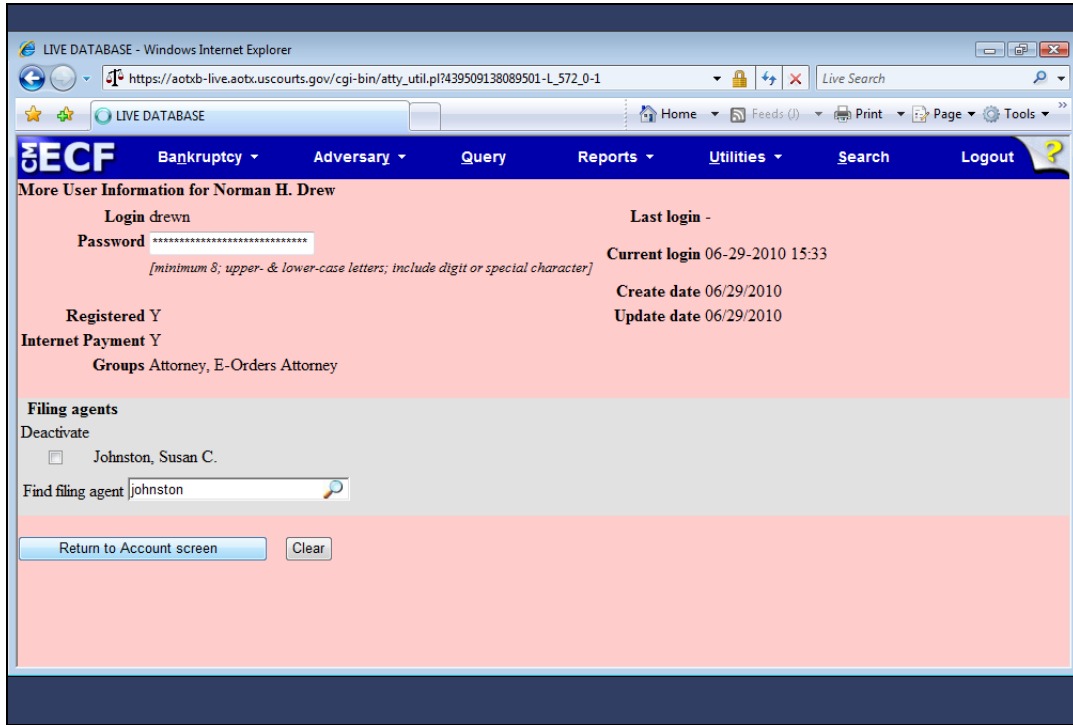
Slide 20

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:

ECF Bankruptcy Adversary Query Reports Utilities Search Logout

Maintain User Account

Last name First name

Middle name Generation

Title Type aty

Office Add Headers to PDF Documents

Address 1

Address 2

Address 3

City State Zip

Country County

Phone Fax

SSN / ITIN Tax ID / EIN

Bar ID Bar status Mail group

Initials DOB AO code Person end date

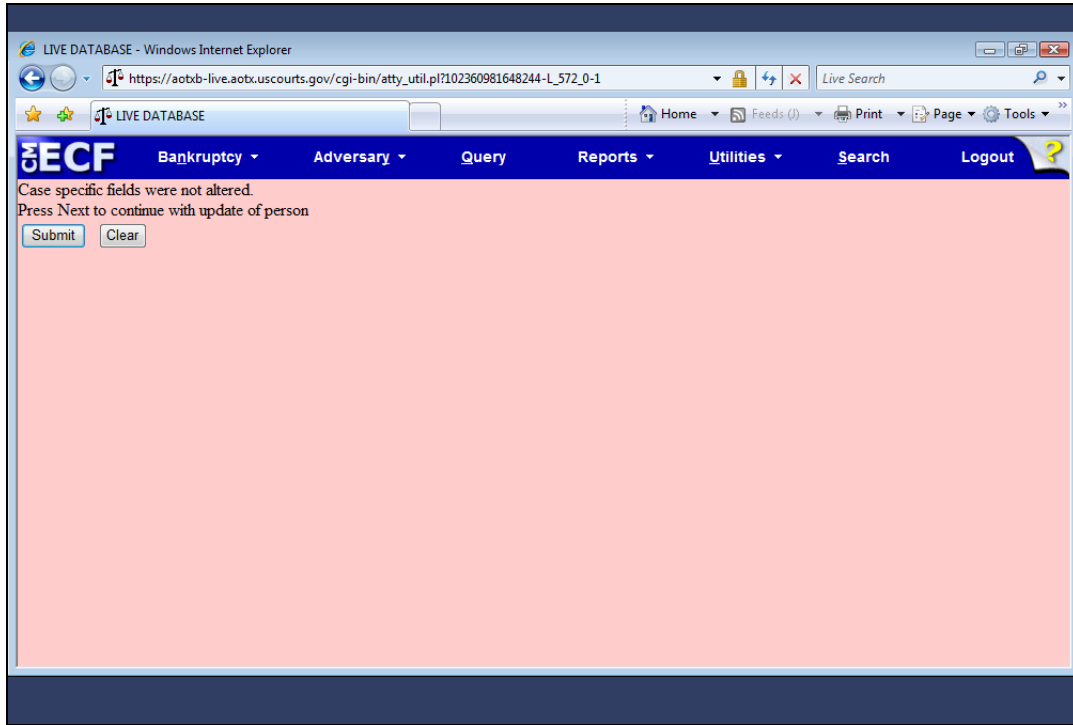
Slide 23

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. 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:

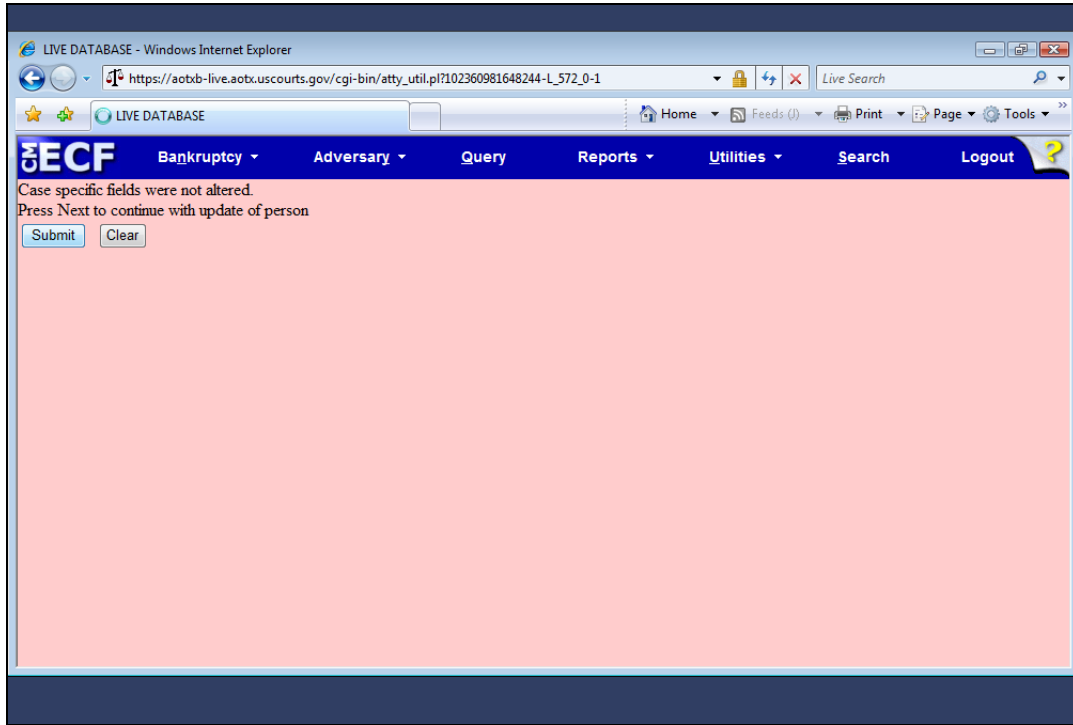
Last name	Drew	First name	Norman
Middle name	H.	Generation	
Title		Type aty	
Office	Rodman & Associates, LLC	<input checked="" type="checkbox"/>	Add Headers to PDF Documents
Address 1	8534 North Jefferson Avenue		
Address 2			
Address 3			
City	San Antonio	State	TX
		Zip	78233
Country		County	
Phone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

Slide 24
Slide notes:



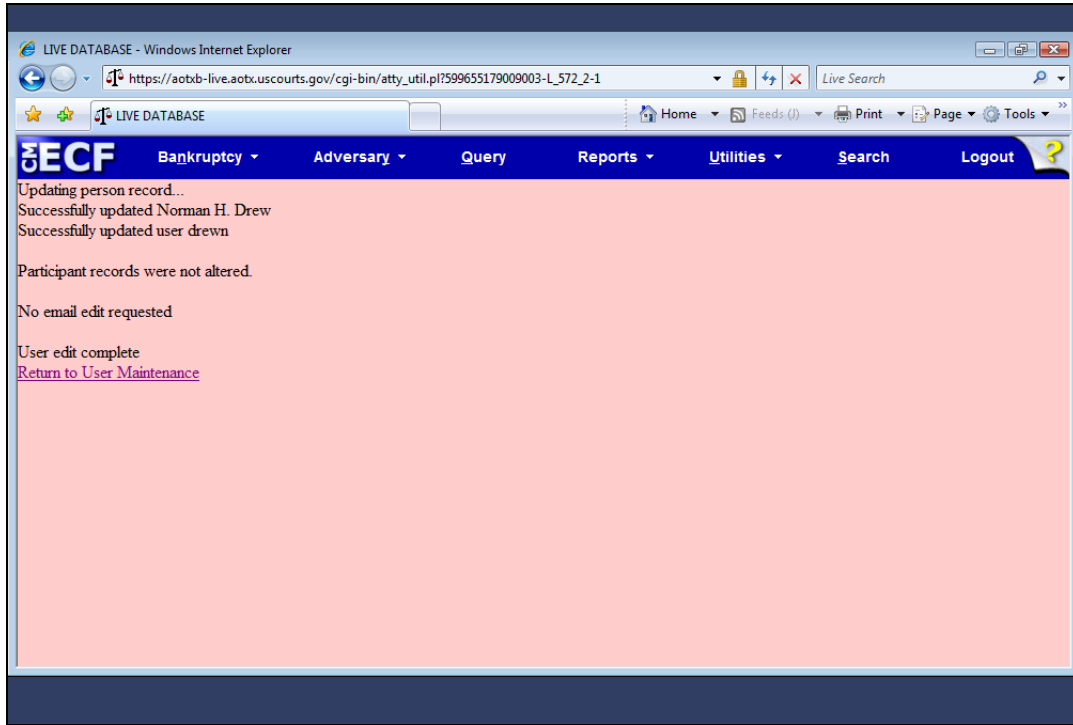
Slide 25

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...



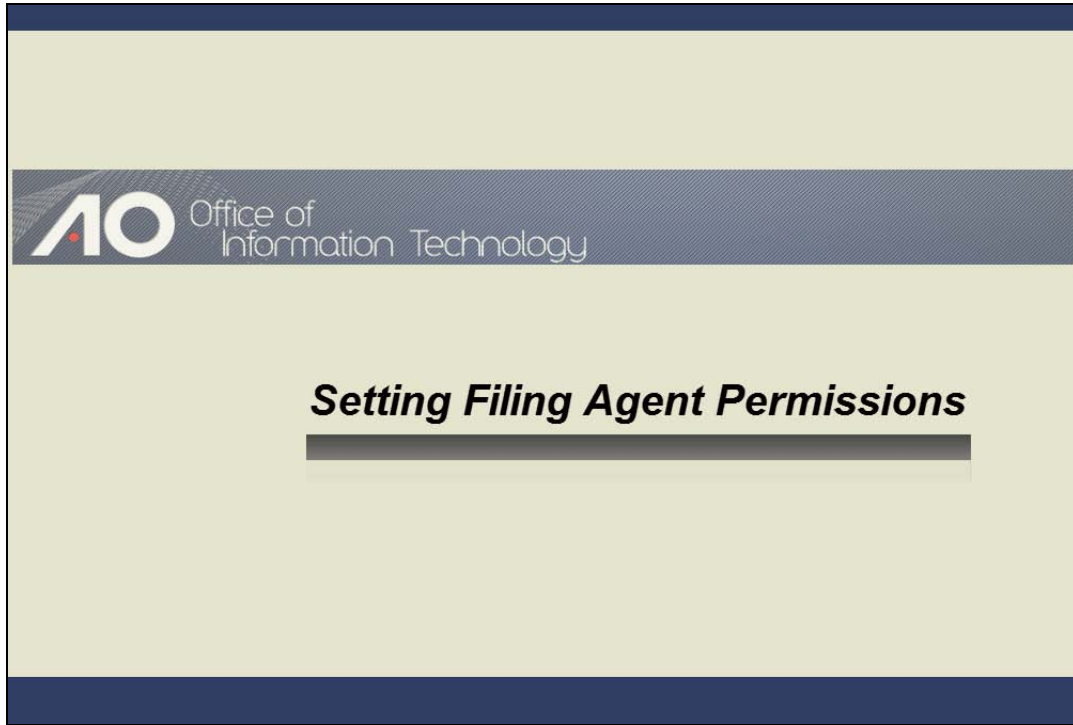
Slide 26

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:

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 tabs: 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: [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]

At the bottom of the form, there are two buttons: "Email information..." and "More user information...". Below these are "Submit" and "Clear" buttons.

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."

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

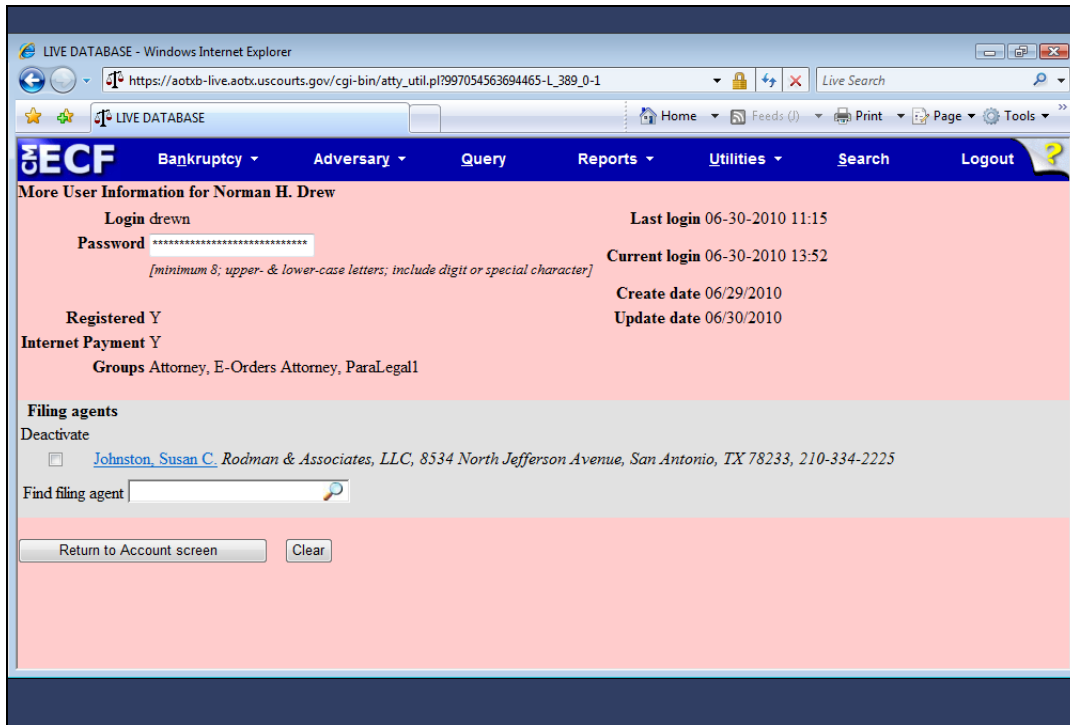
ECF Bankruptcy Adversary Query Reports Utilities Search Logout

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

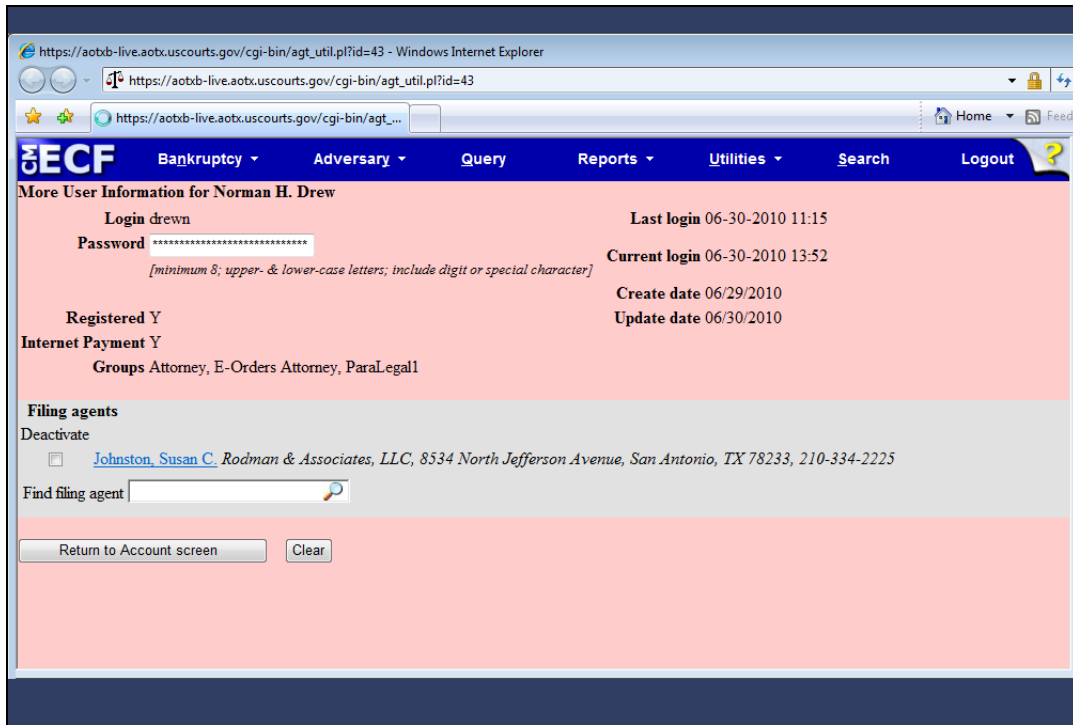
Email information... More user information...
Submit Clear

Slide 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**

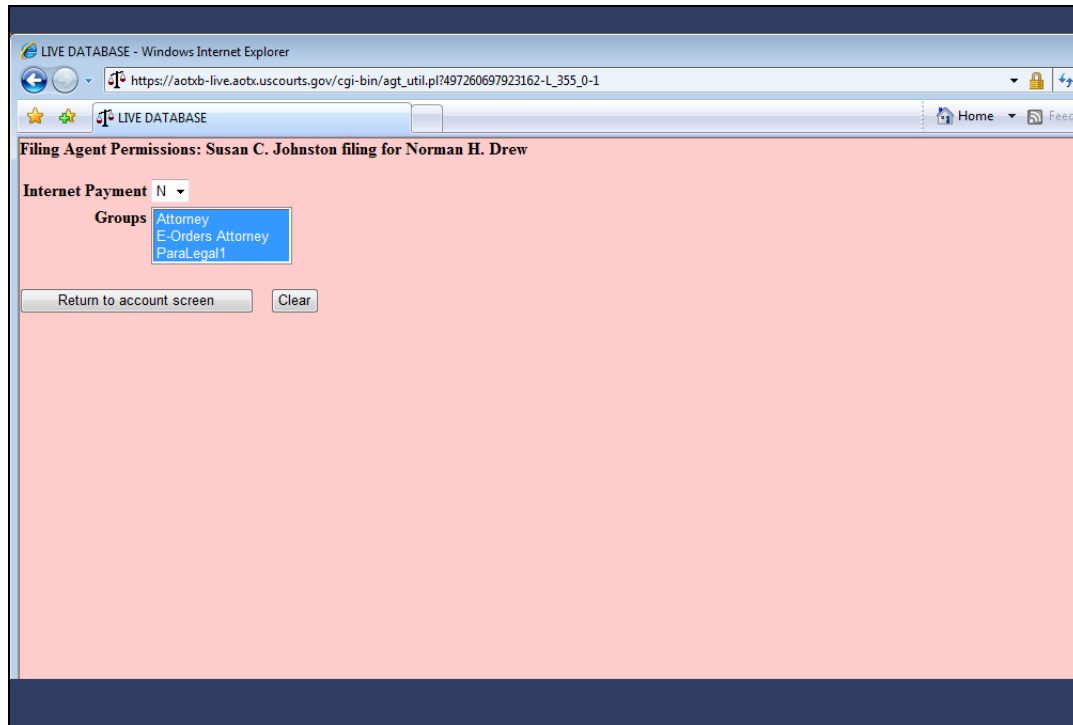
Title Para Legal
Office Rodman & Associates, LLC

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

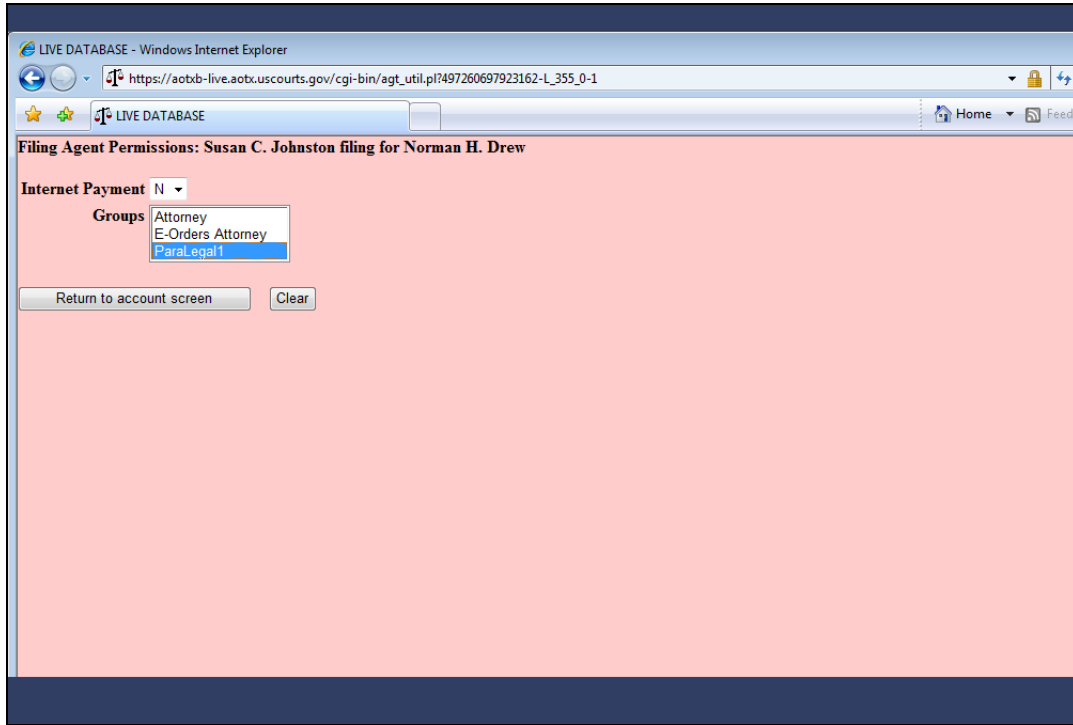
Slide notes: Access permissions for filing agents are determined and maintained by the court or by the associated attorney or trustee. The filing agent cannot maintain his or her own access permissions.

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.

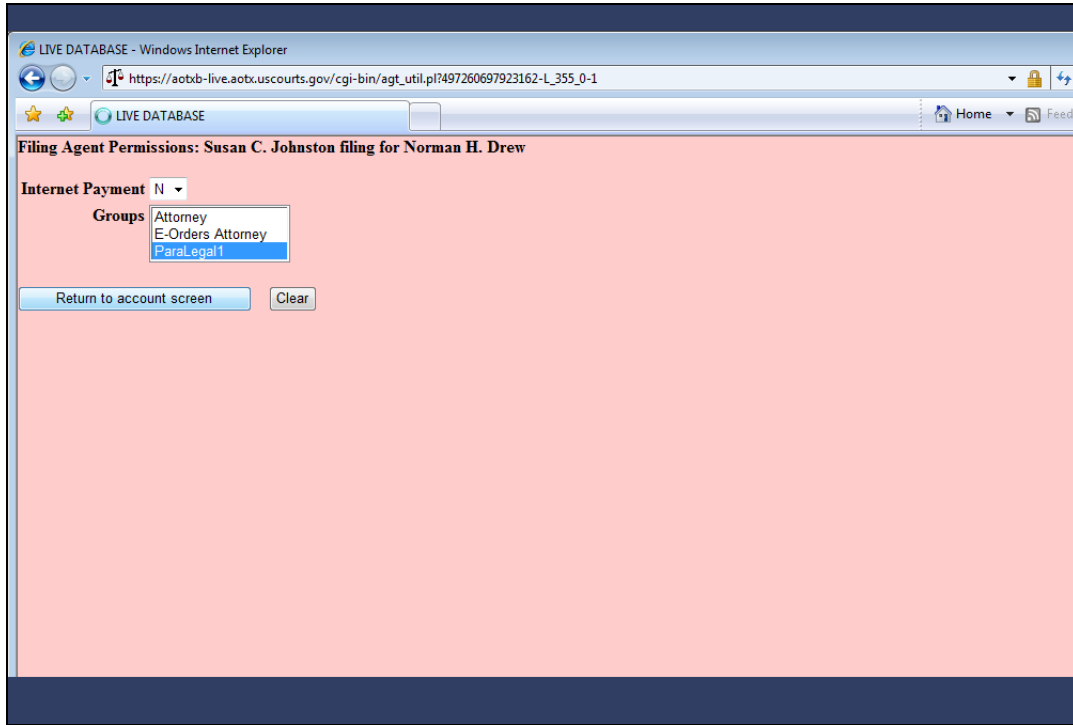
As I stated before, most of the time, attorneys and trustees will allow their filing agents the same permissions as they have. If no change is made to this screen, this filing agent would be granted all permissions of the Attorney, E-Orders Attorney and ParaLegal1 groups.

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:

Filing Agent Information

Login johnstons **Last login** -
Password ***** **Current login** -
[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**

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.

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 [redacted]
[minimum 8, upper- & lower-case letters; include digit or special character]

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

Last name Johnston
Middle name C.
Title Para Legal
Office Rodman & Associates, LLC
Address 1 8534 North Jefferson Avenue
Address 2 [redacted]
Address 3 [redacted]
City San Antonio
Country [redacted]
Phone 210-334-2225
SSN / ITIN [redacted]

First name Susan
Generation [redacted]
State TX
Zip 78233
County BEXAR-TX
Fax [redacted]
DOB [redacted]

Done Internet | Protected Mode: Off 100%

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.aotxb.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, it says "Current login -" and "Create date 06/29/2010". The form fields are organized as follows:

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

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

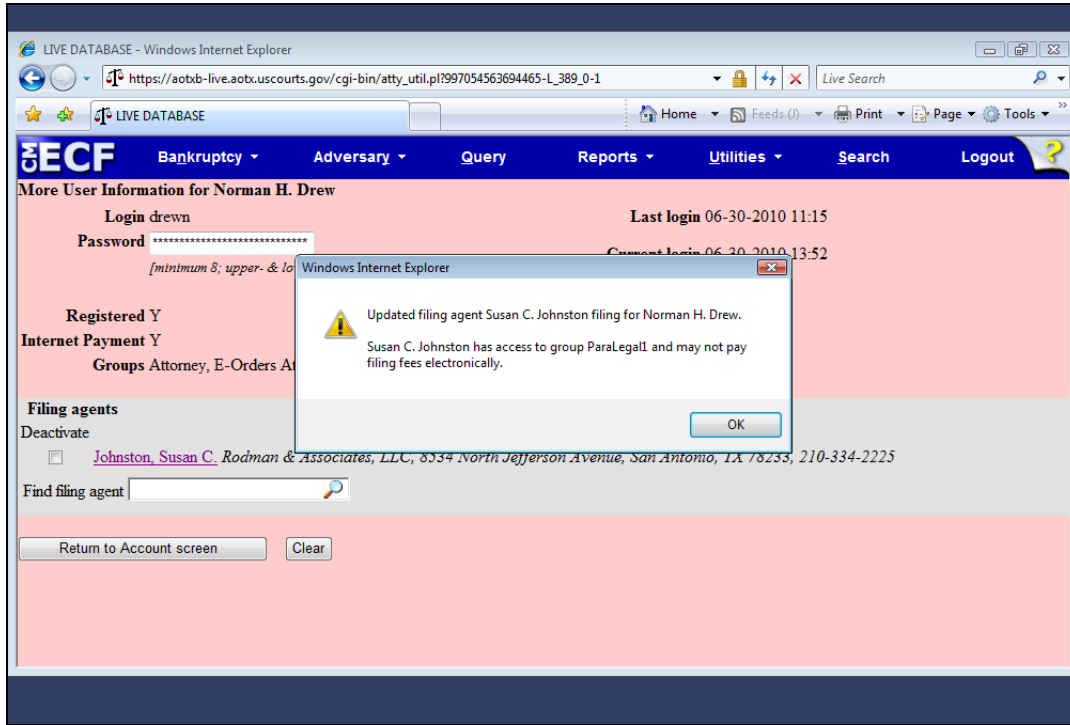
Slide 40
Slide notes: ...and click Submit.

The screenshot shows a web browser window titled "LIVE DATABASE - Windows Internet Explorer". The address bar contains the URL: https://aotxb-live.aotxb.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:

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

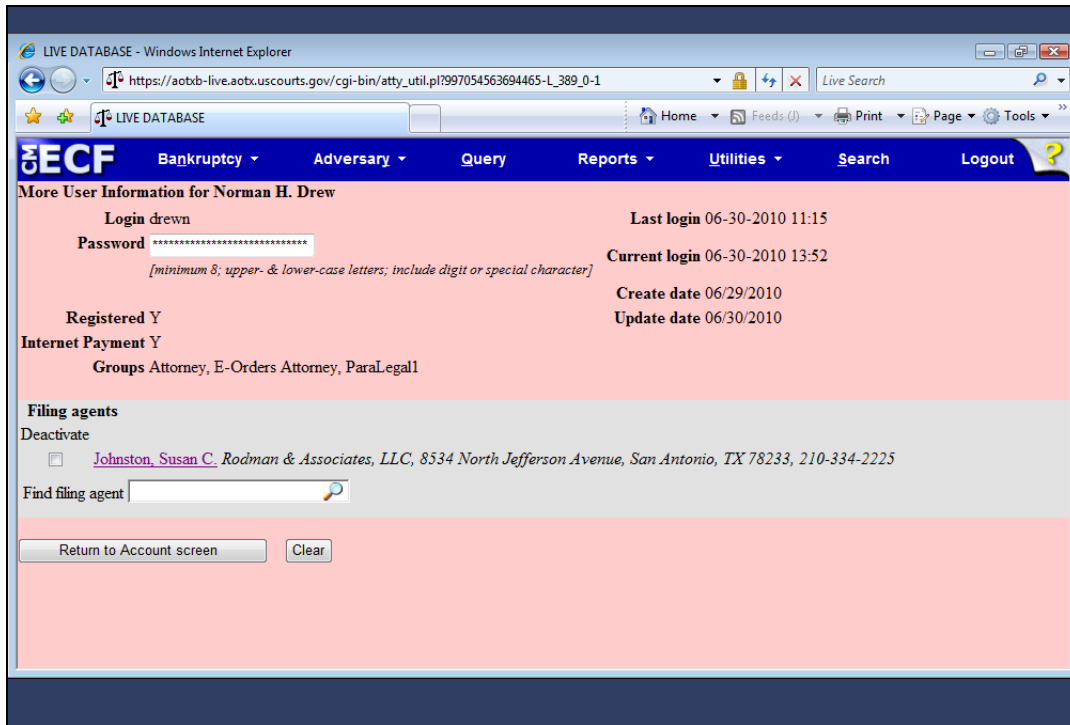
At the bottom of the form, there is an "Update permissions" button, and "Submit" and "Clear" buttons. The browser status bar at the bottom shows "Waiting for https://aotxb-live.aotxb.uscourts.gov/cgi-bin/agt_util.pl?783" and "Internet | Protected Mode: Off".

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."

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/atty_util.pl?997054563694465-L_389_0-1. The page header features the ECF logo and navigation tabs: Bankruptcy, Adversary, Query, Reports, Utilities, Search, and Logout. The main content area is titled "More User Information for Norman H. Drew" and is divided into several sections:

- Login Information:** Login drawn, Last login 06-30-2010 11:15, Password (masked), Current login 06-30-2010 13:52. A note below the password field states: "[minimum 8; upper- & lower-case letters; include digit or special character]".
- Registration Details:** Registered Y, Internet Payment Y, Create date 06/29/2010, Update date 06/30/2010. Groups: Attorney, E-Orders Attorney, ParaLegal1.
- Filing Agents:** A section titled "Filing agents" with a "Deactivate" checkbox and a list of agents. One agent is listed: [Johnston, Susan C. Rodman & Associates, LLC](#), 8534 North Jefferson Avenue, San Antonio, TX 78233, 210-334-2225. Below this is a "Find filing agent" search box.

At the bottom of the page, there are two buttons: "Return to Account screen" and "Clear".

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. The page title is 'LIVE DATABASE - Windows Internet Explorer'. 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: [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

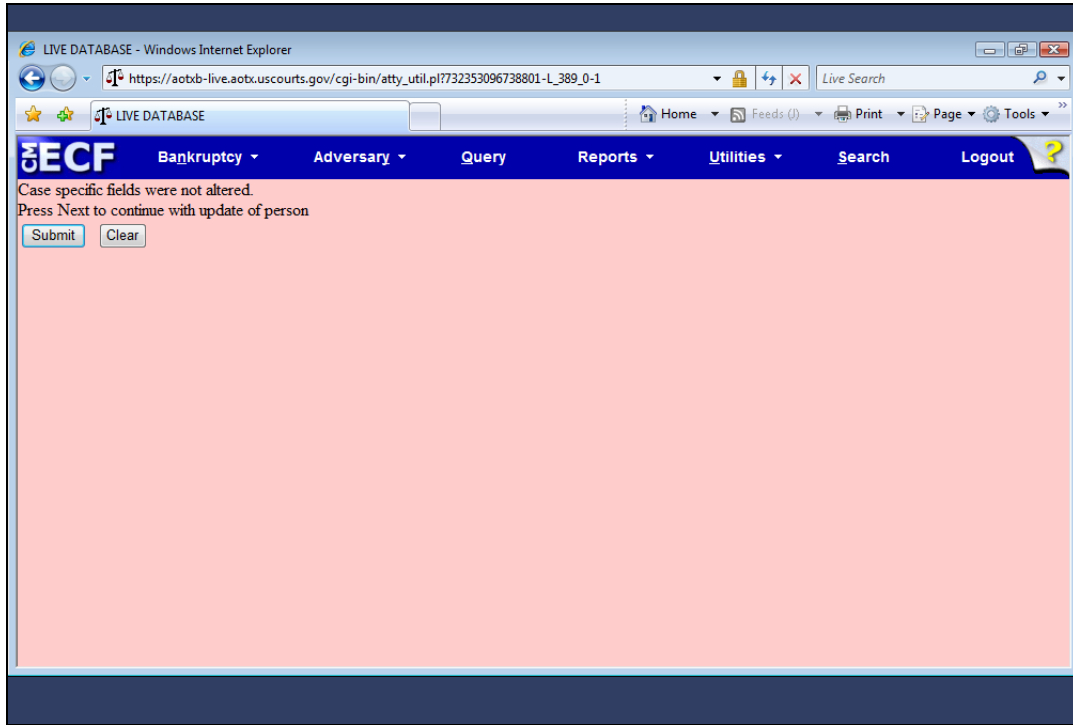
ECF Bankruptcy Adversary Query Reports Utilities Search Logout

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

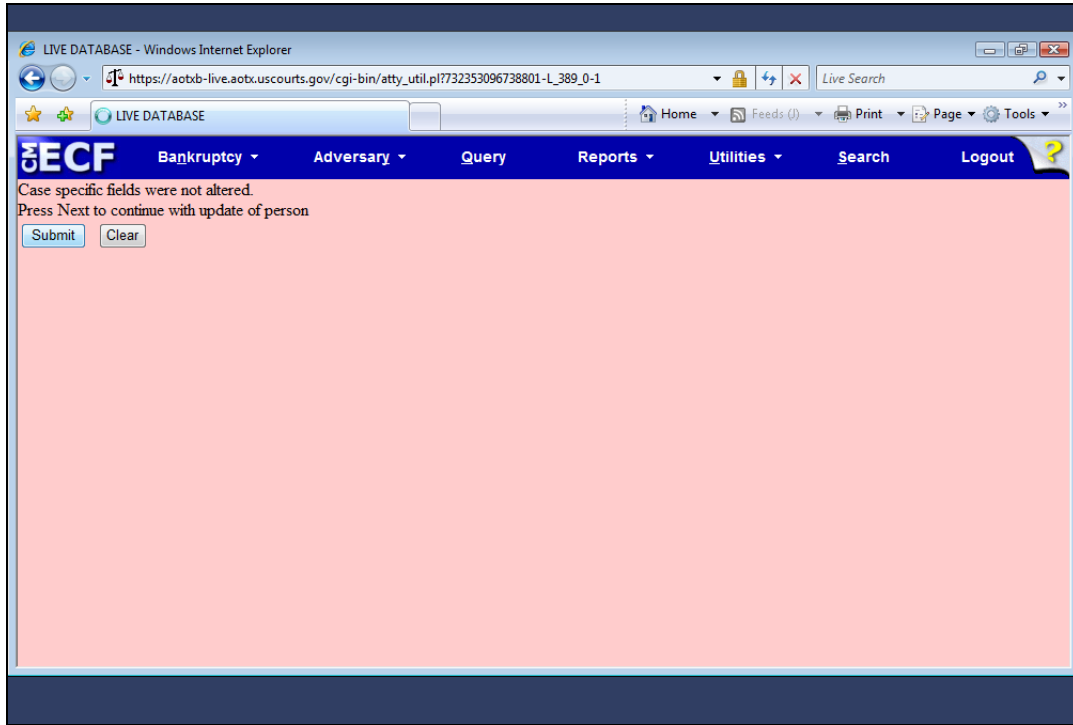
Email information... More user information...
Submit Clear

Slide 46
Slide notes:



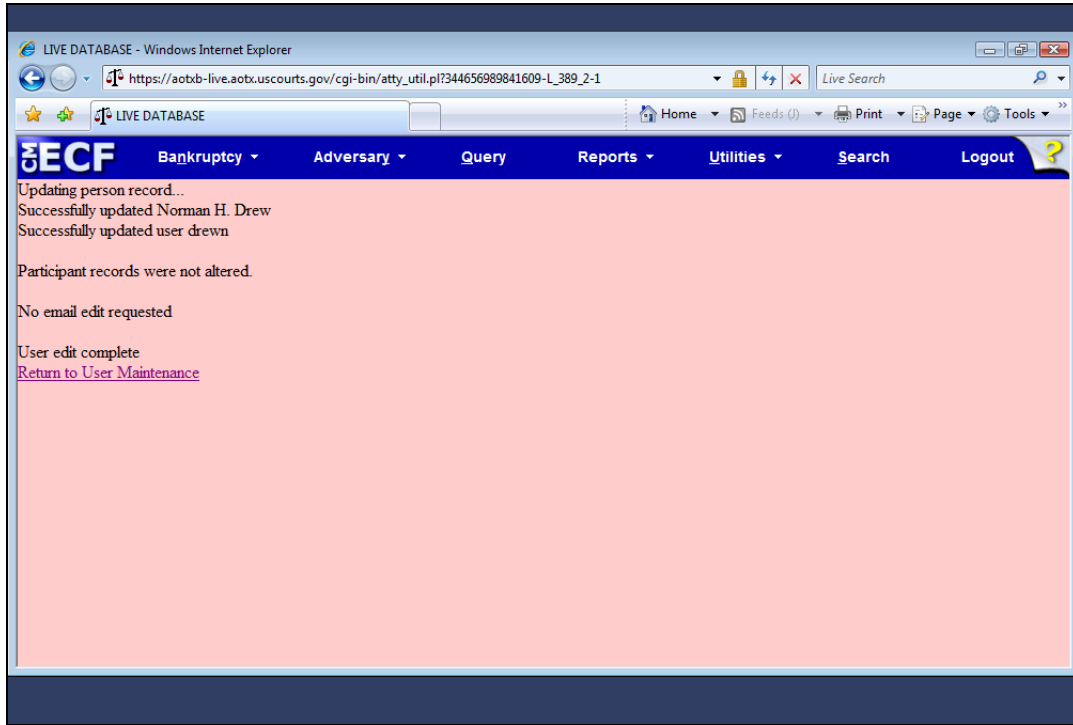
Slide 47

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



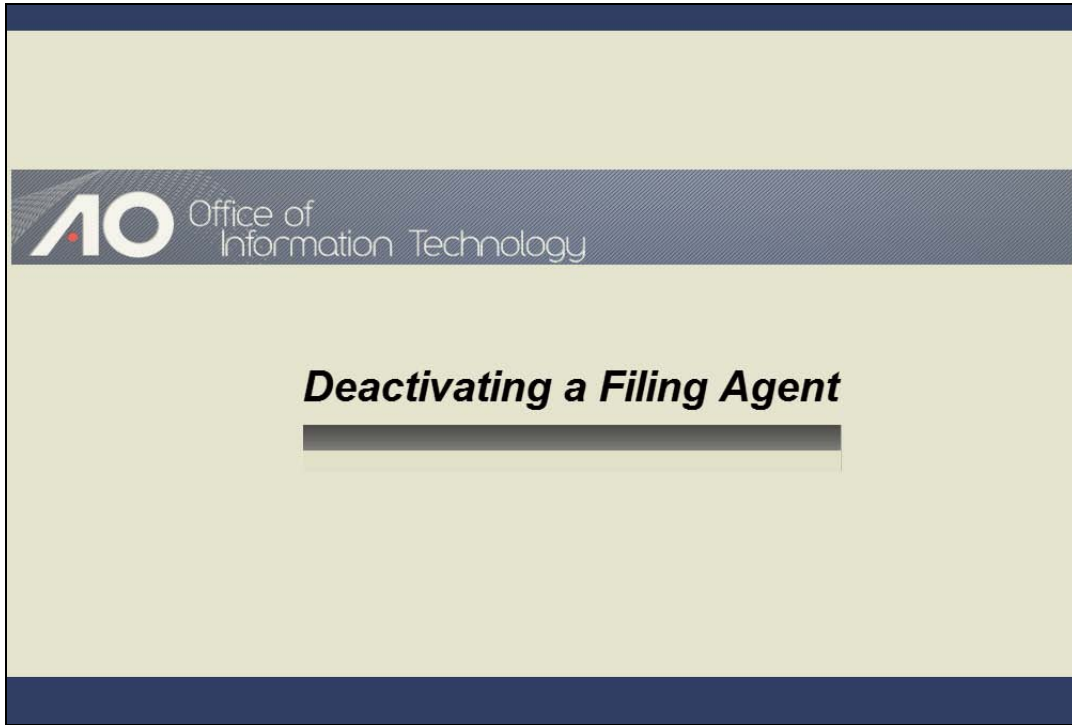
Slide 48

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 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 the following form 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

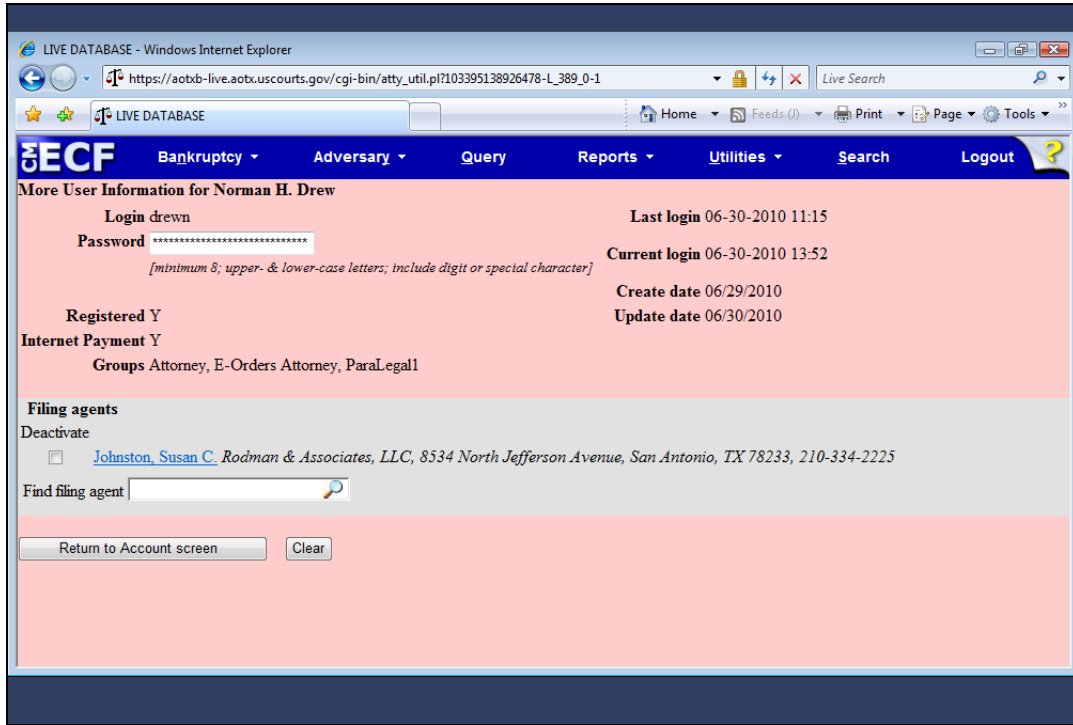
ECF Bankruptcy Adversary Query Reports Utilities Search Logout

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

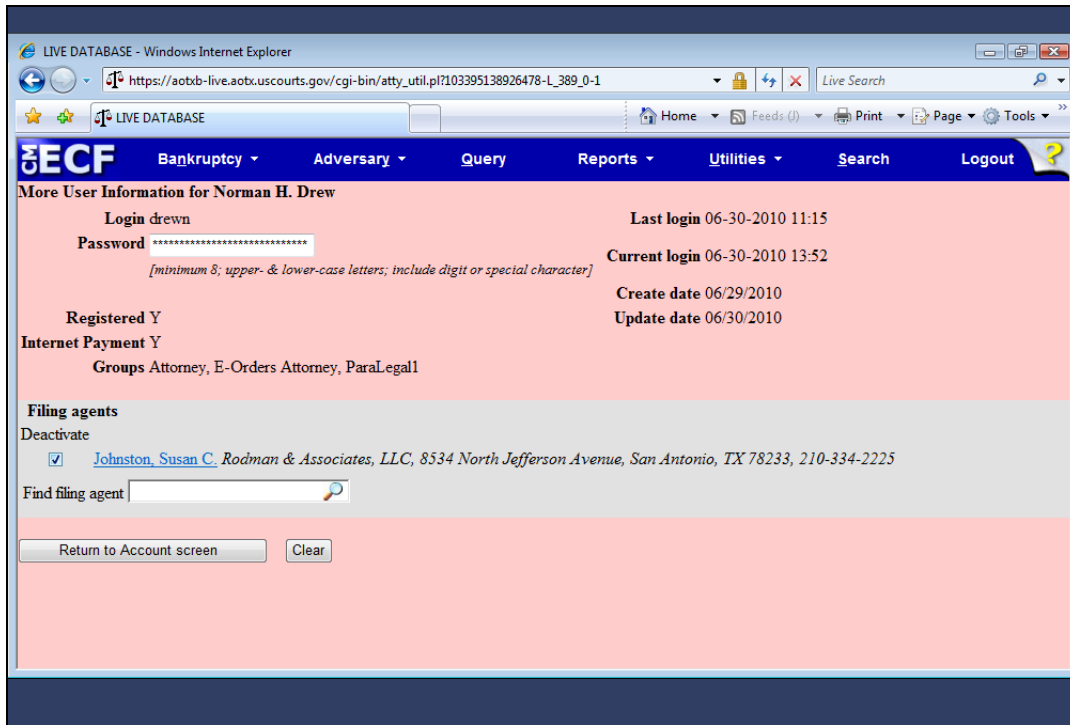
Email information... More user information...
Submit Clear

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.aotb.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:

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

LIVE DATABASE - Windows Internet Explorer
https://aotxb-live.aotb.uscourts.gov/cgi-bin/atty_util.pl?738647854872466-L_9999_1

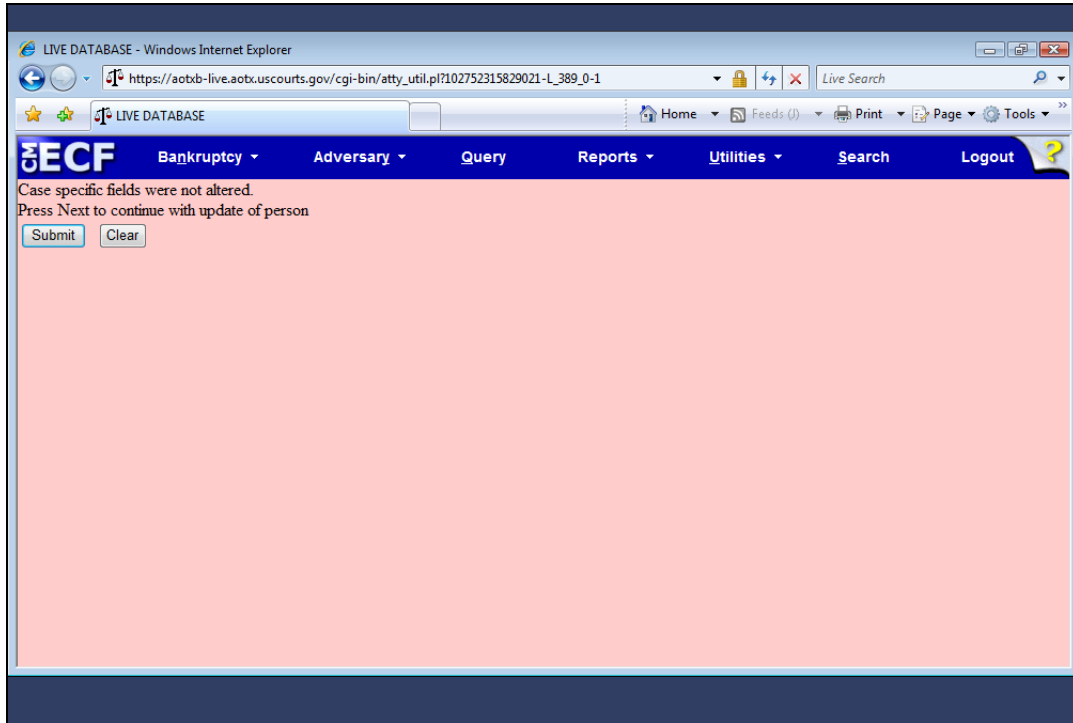
ECF Bankruptcy Adversary Query Reports Utilities Search Logout

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 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

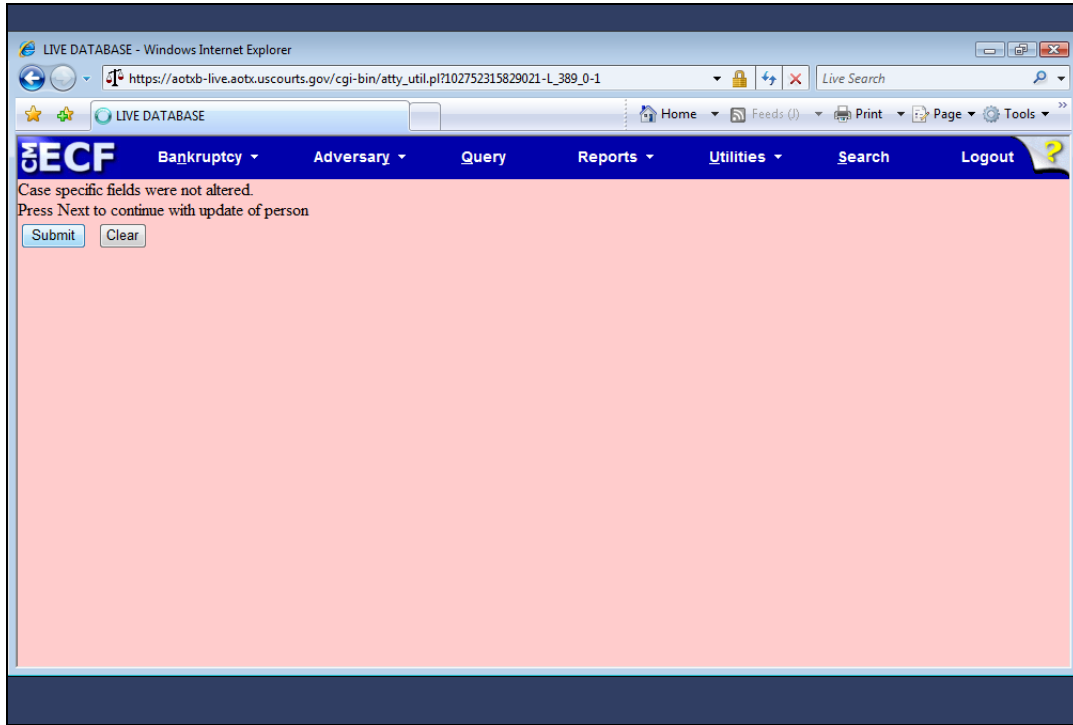
Email information... More user information...
Submit Clear

Slide 56
Slide notes:



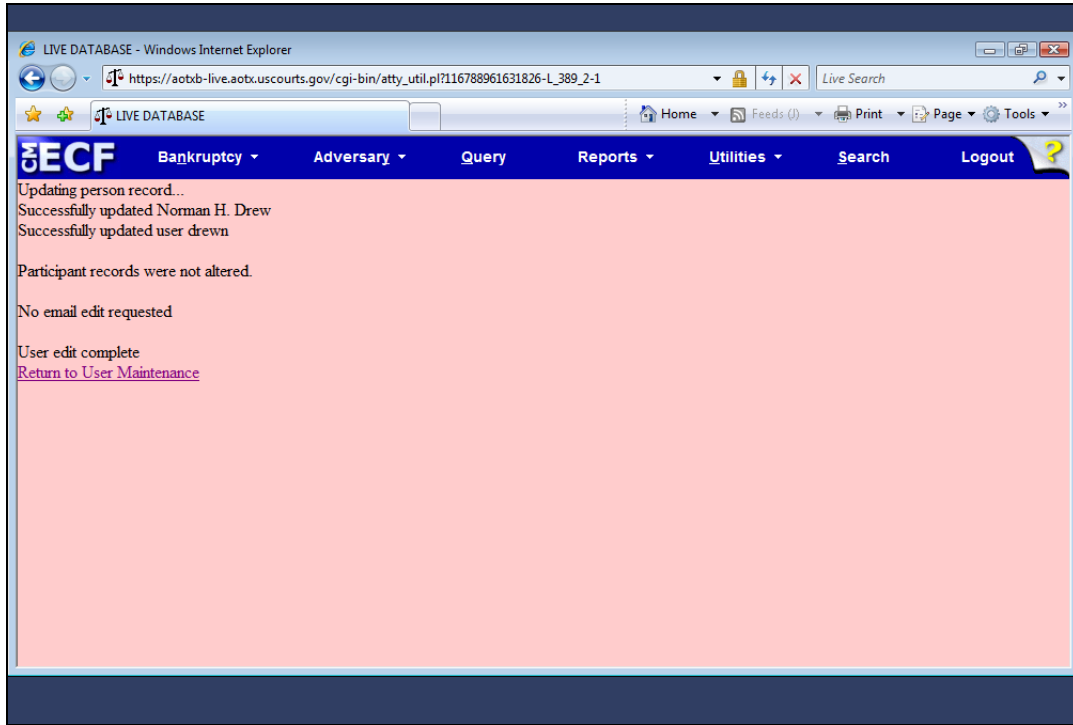
Slide 57

Slide notes:



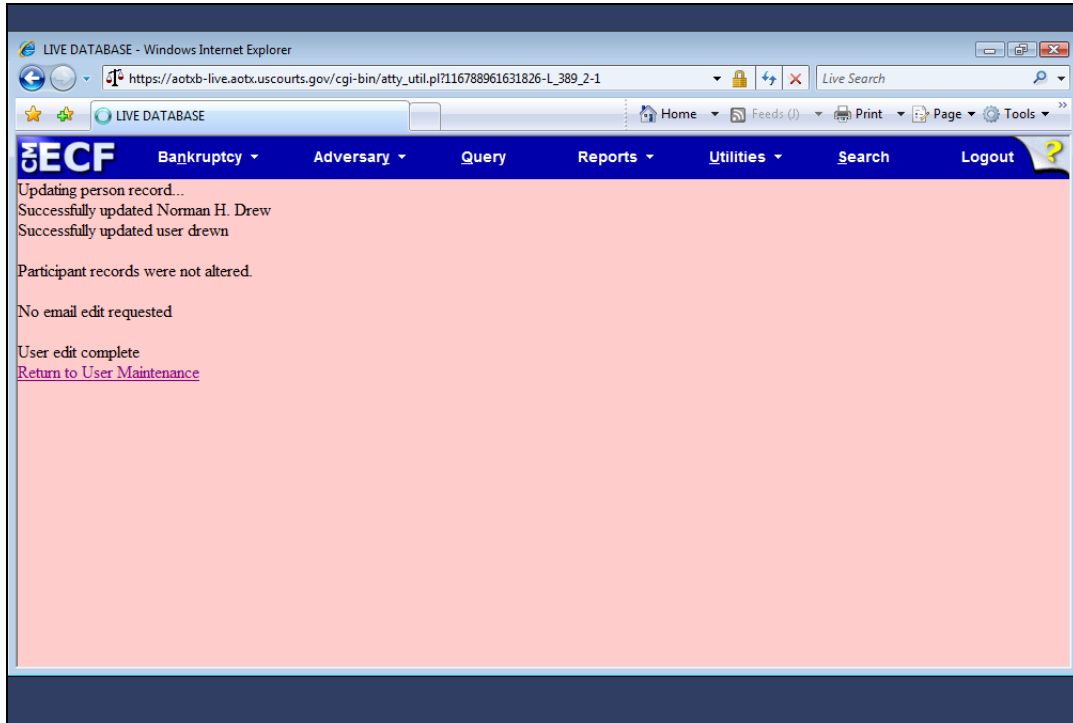
Slide 58

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 with the URL https://aotxb-live.aotb.uscourts.gov/cgi-bin/atty_util.pl. 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 items: Bankruptcy, Adversary, Query, Reports, Utilities, Search, and Logout. Below the menu is the "Maintain User Account" form. The form has a light pink background and contains the following fields and labels:

- 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]

At the bottom of the form, there are two buttons: "Email information..." and "More user information...". Below these are "Submit" and "Clear" buttons.

Slide 61

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

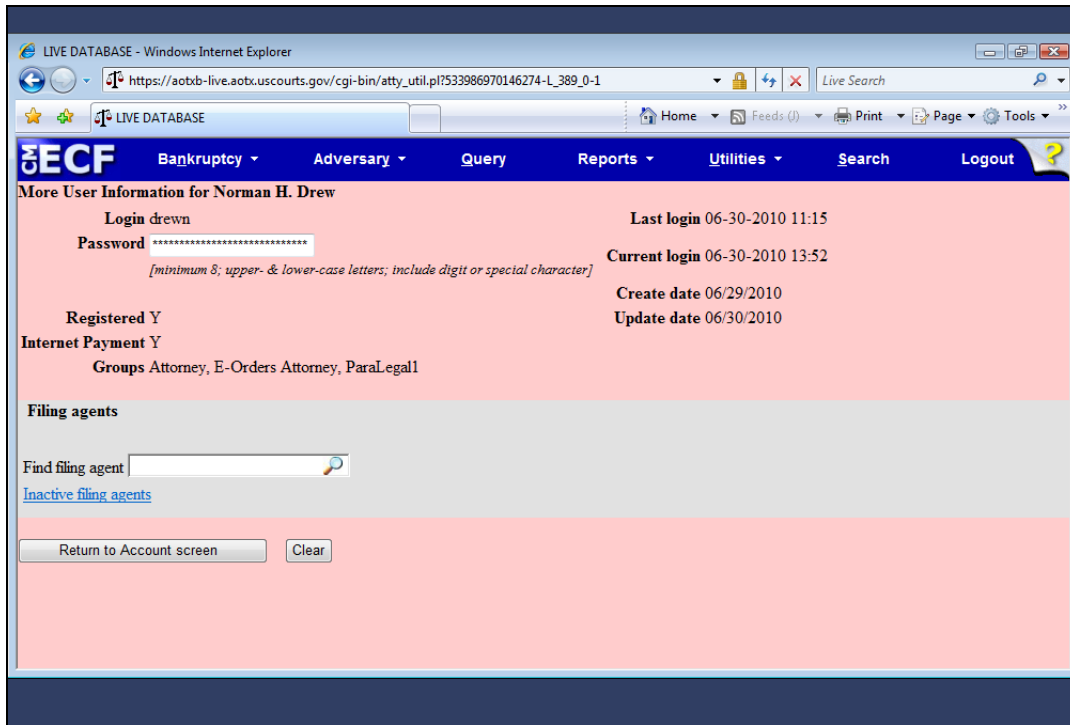
LIVE DATABASE - Windows Internet Explorer
https://aotxb-live.aotb.uscourts.gov/cgi-bin/atty_util.pl

ECF Bankruptcy Adversary Query Reports Utilities Search Logout

Maintain User Account

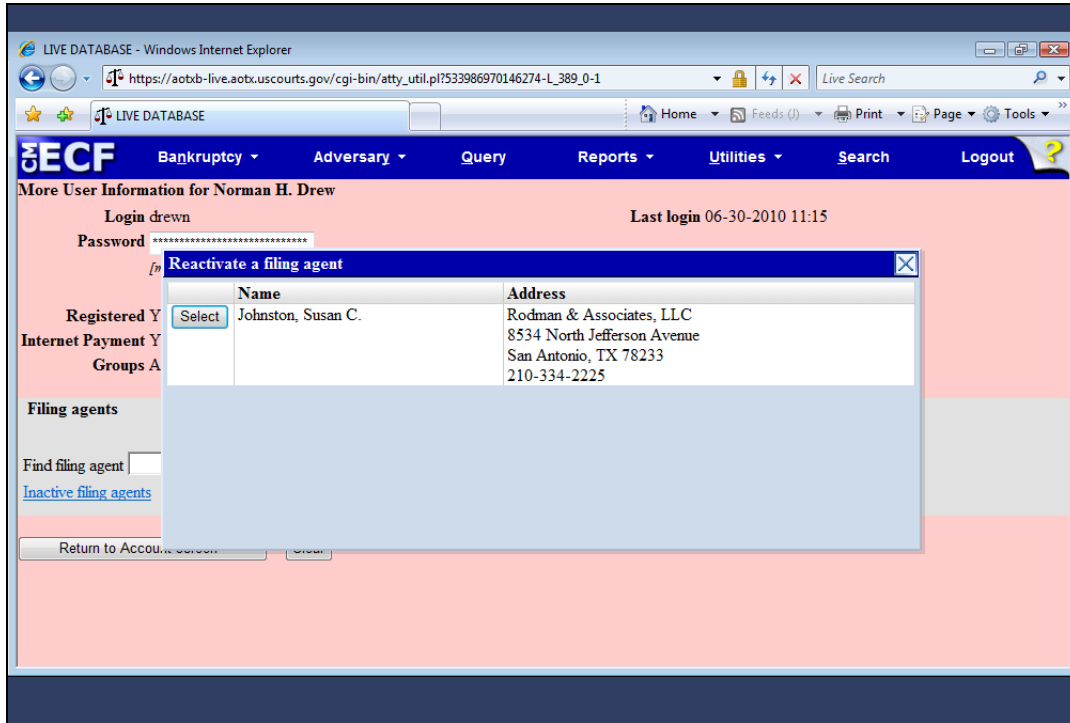
Last name: Drew First name: Norman
Middle name: H. Generation:
Title: Type aty
Office: Rodman & Associates, LLC Add Headers to PDF Documents
Address 1: 8534 North Jefferson Avenue
Address 2:
Address 3:
City: San Antonio State: TX Zip: 78233
Country: County: BEXAR-TX
Phone: 210-334-2225 Fax:
SSN / ITIN: 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 62
Slide notes:



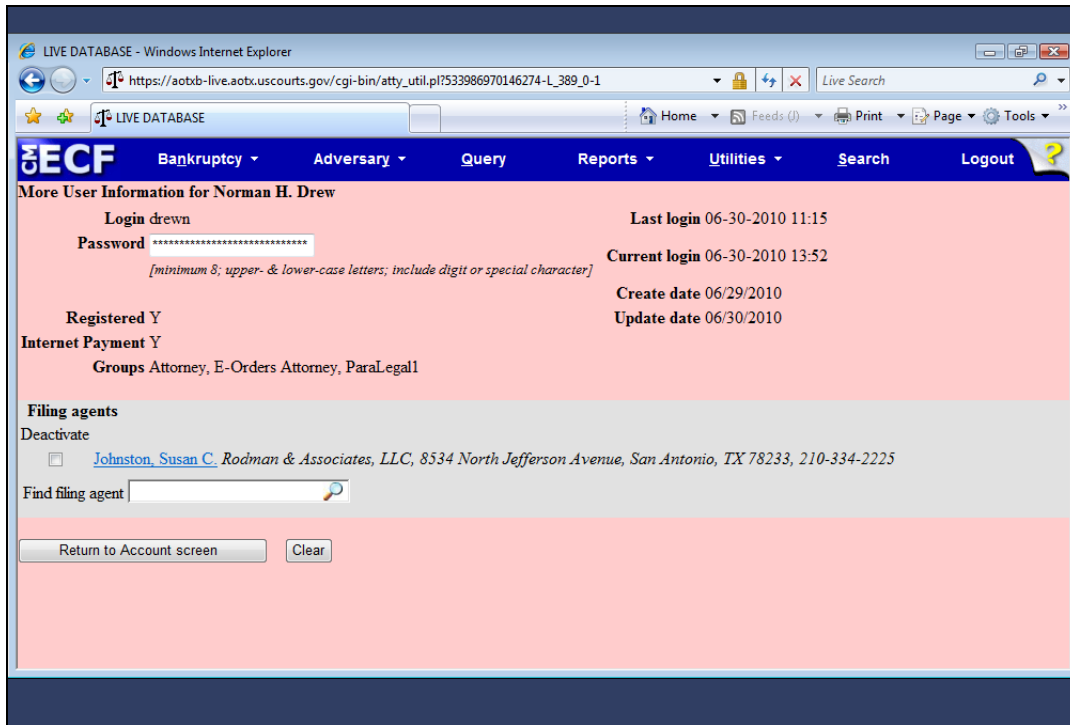
REACTIVATING A FILING AGENT

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.

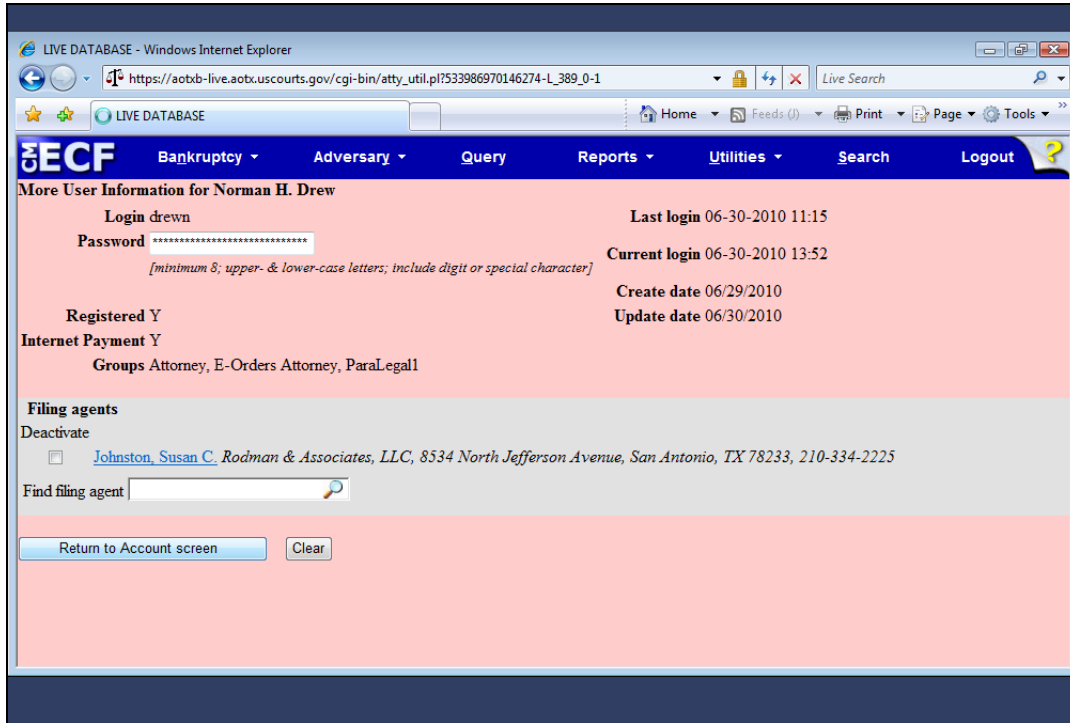


Slide 64

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.



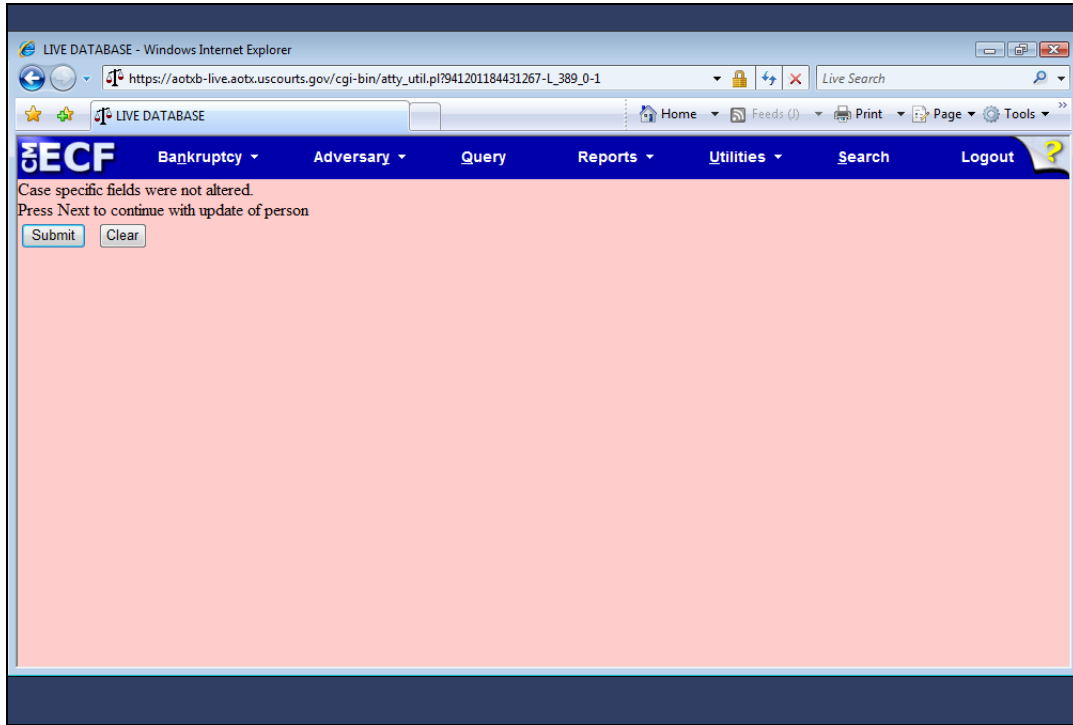
Slide 66
Slide notes:

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?996960623235184-L_9999_1". 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 the following fields:

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	

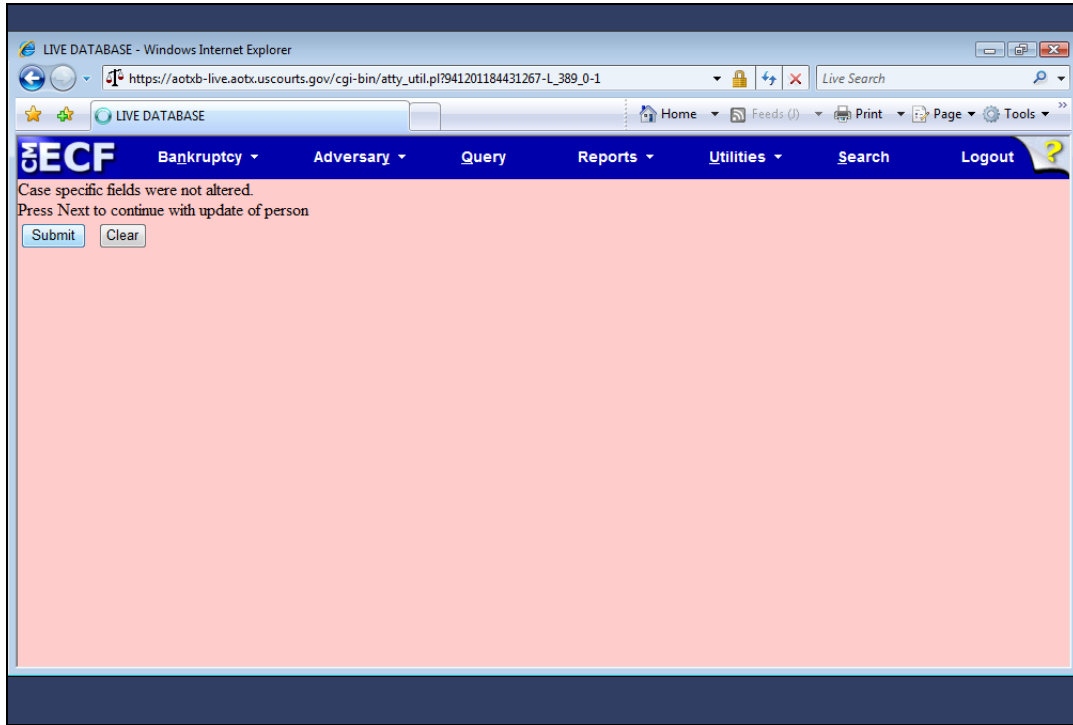
Buttons at the bottom include "Email information...", "More user information...", "Submit", and "Clear".

Slide 67
Slide notes:



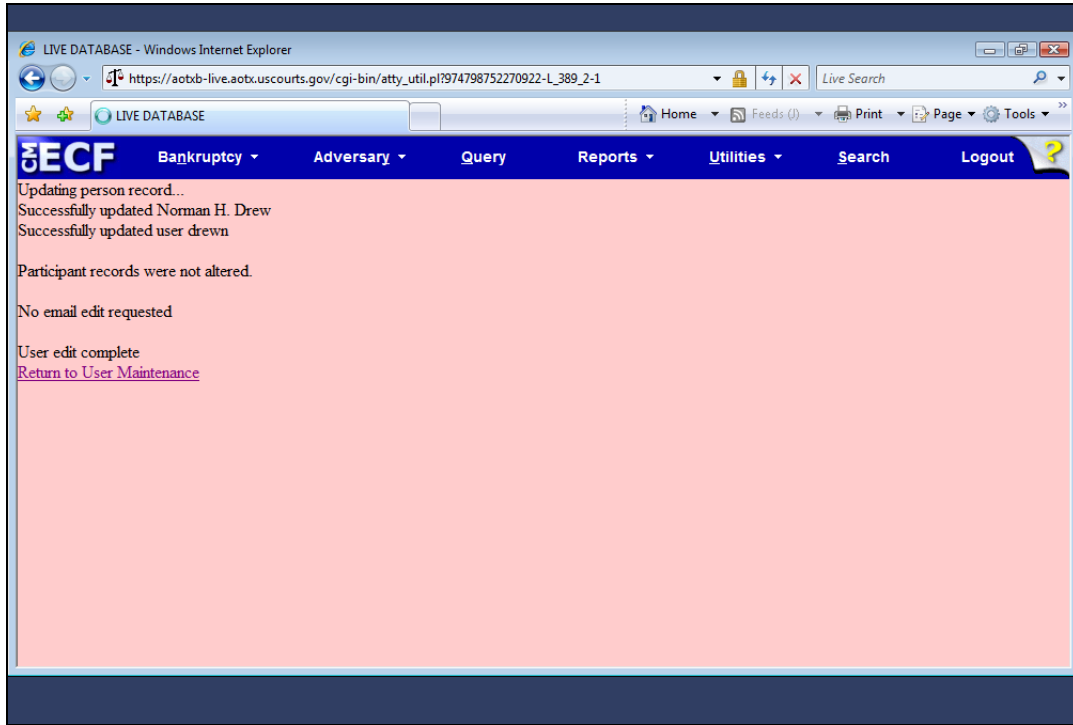
Slide 68

Slide notes:



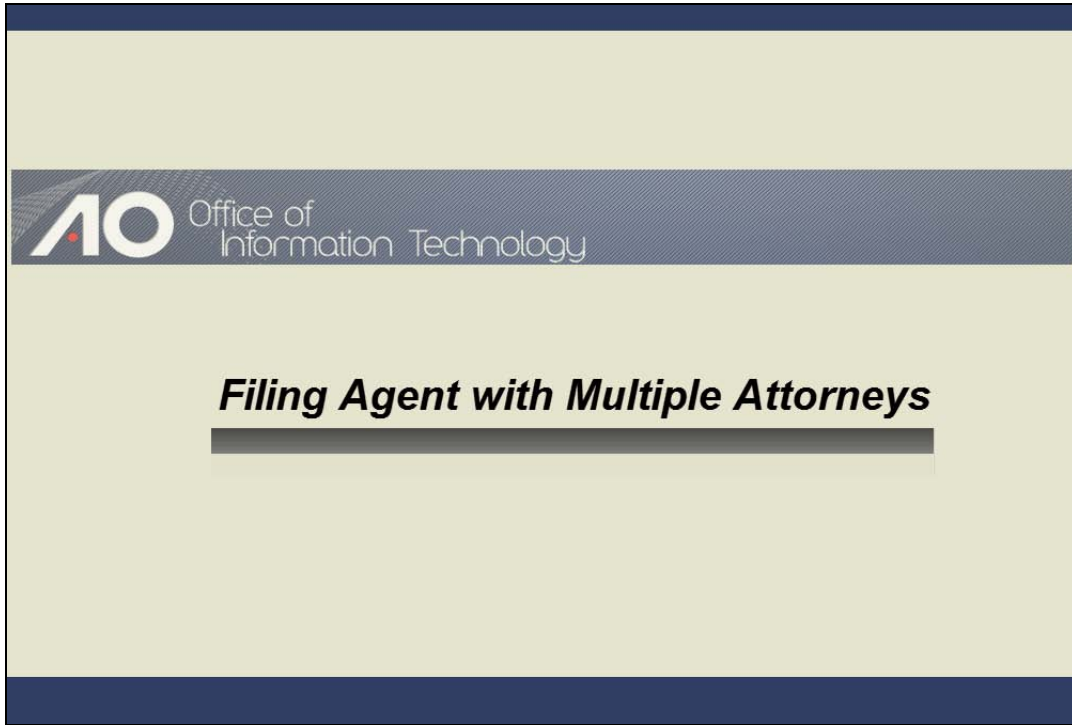
Slide 69

Slide notes:



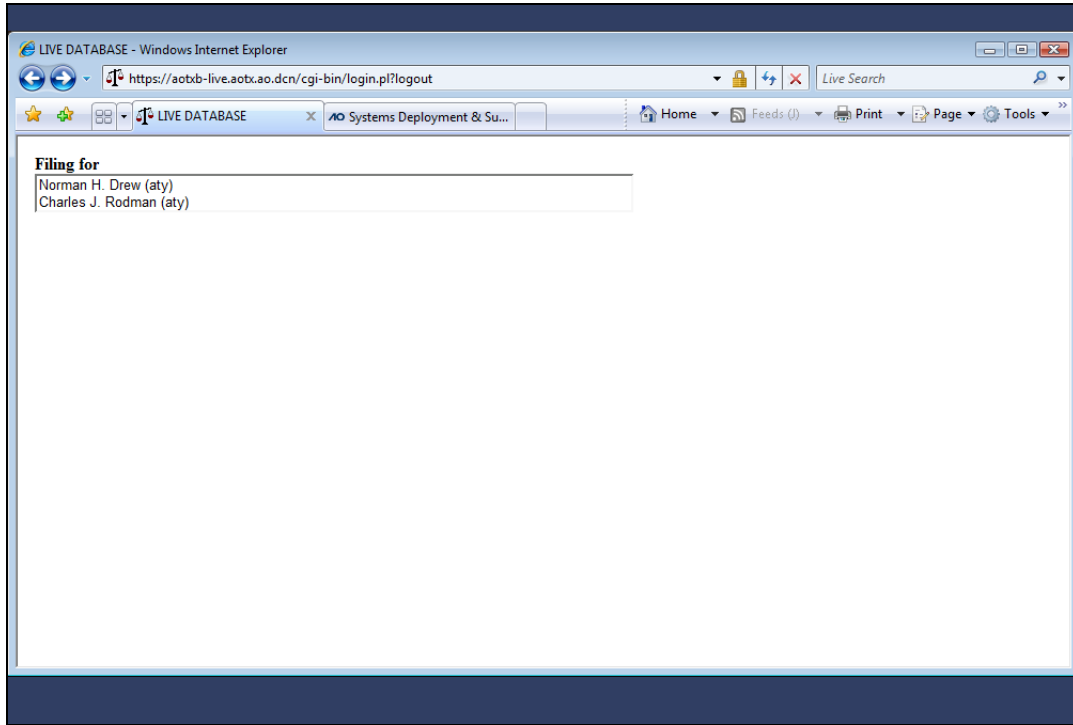
Slide 70

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



FILING AGENT WITH MULTIPLE ATTORNEYS

Slide notes:

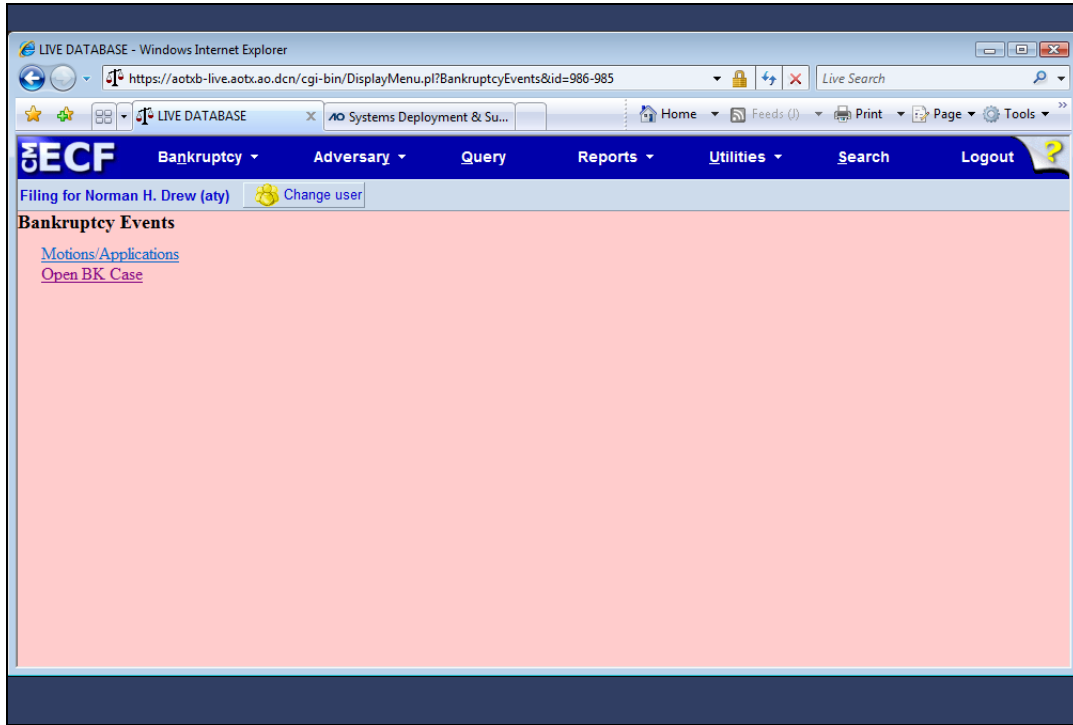


Slide 72
Slide notes: If a filing agent has been linked to two or more attorneys, the first screen that appears after the agent logs in requires the agent to select the attorney for whom he or she is filing. Watch what happens when the attorney, Norman Drew, is selected.



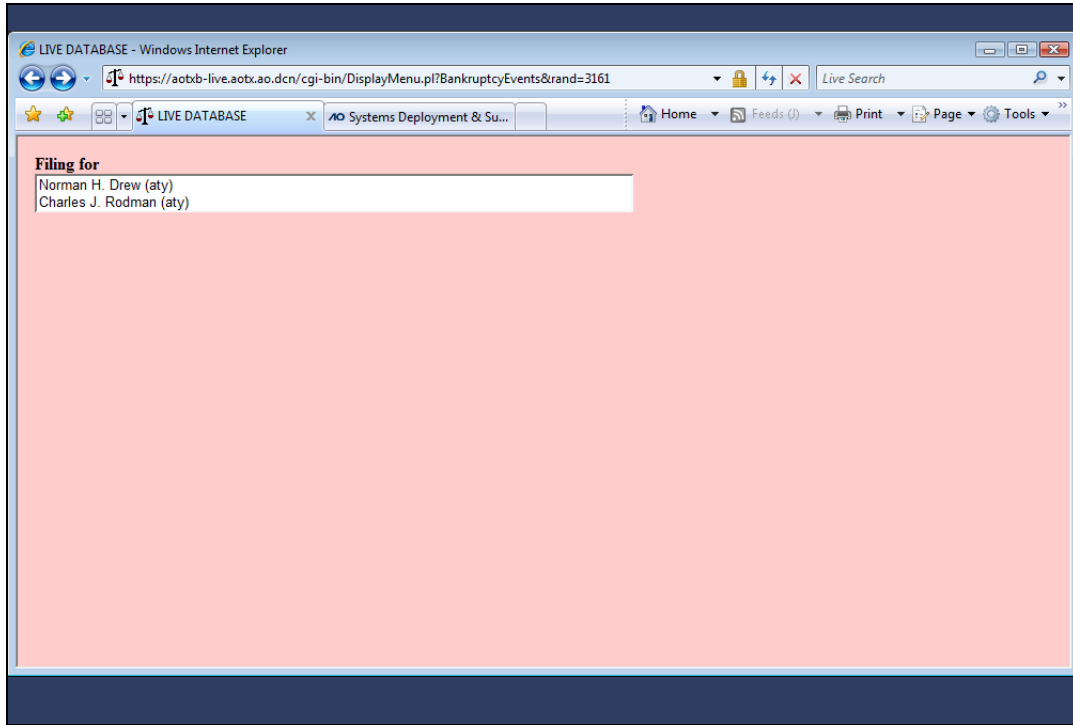
Slide 73

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.



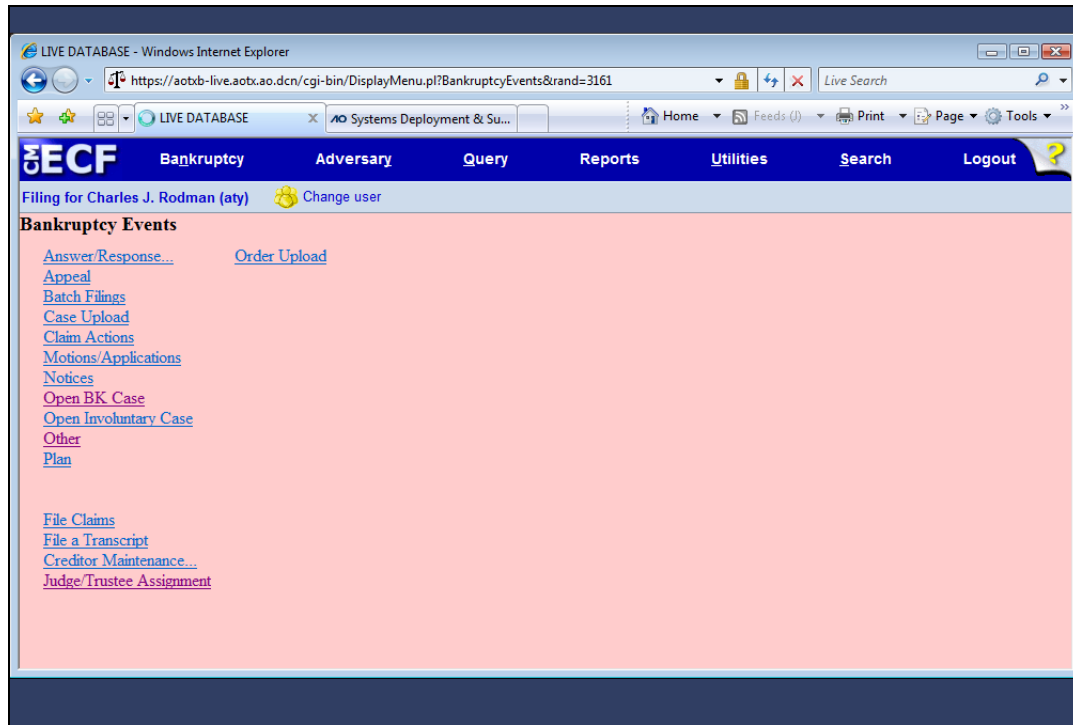
Slide 74

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...



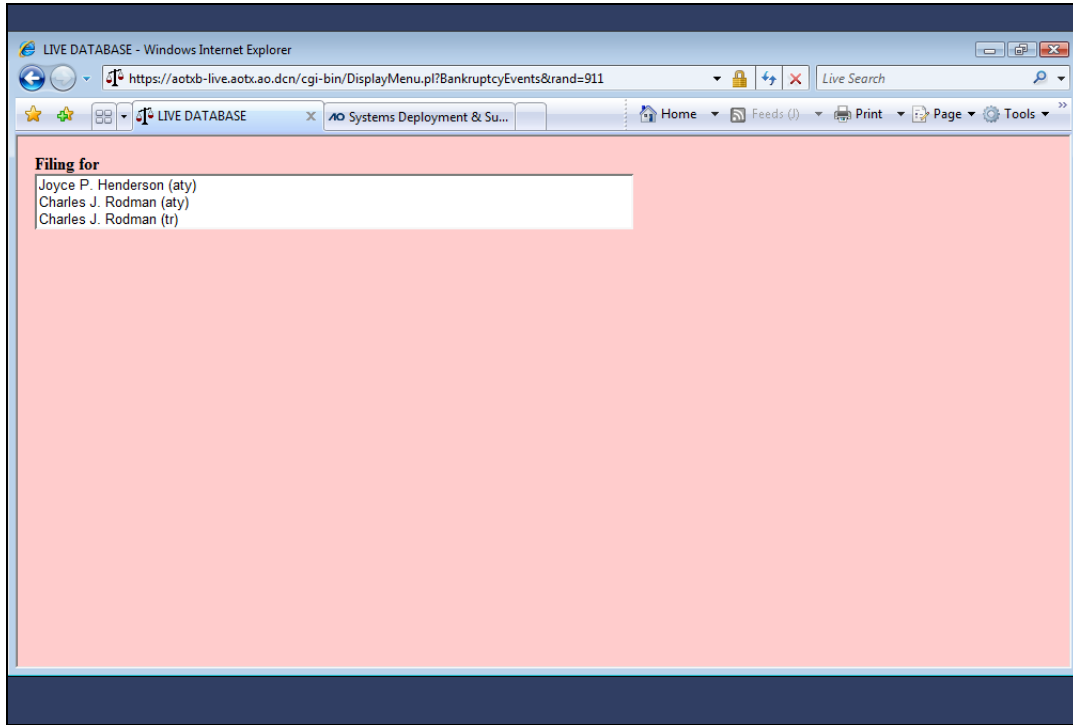
Slide 75

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.

A slide with a light beige background and a dark blue border. The title "Summary" is centered at the top. Below it, the text "You should now be able to:" is followed by a bulleted list of four items: "Explain the features of filing agents.", "Create a filing agent in CM/ECF.", "Update permissions for a filing agent.", and "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.