

CM/EC

4.1



**Filing Agents
for
Attorneys & Trustees**

Filing Agents

- A filing agent files on behalf of the attorney or trustee but uses his or her own login and password.
- The filing agent may be linked to multiple attorneys and trustees.

Filing Agents

- Filing agent will not appear on the attorney pick list.
- Filing agent will appear in the “Person/User Search Results” list in Maintain User Accounts and Edit Person Data.

Filing Agents

- The NEF and docket text will show the name of the attorney/trustee.
- The filing agent will not receive an email on their own. Email must be designated by attorney/trustee “***Send notices to these additional addresses.***”

Filing Agent – More than one filer

Filing for
George T. Walker (aty)
Jeanne L. Walker (aty)

When the filing agent works for two or more attorneys/trustees, he/she must select the filer at login.



The agent will then be allowed to change users as needed without having to log out and log back in again.

Filing Agent Preparation

- Filing agents is an optional feature
 - Decide
 - Should court offer filing agents
 - When should you implement this feature
 - Should you give setup to external users
- Parties affected
 - Court staff, Attorneys, Trustees, US Trustees
- Training Modes
 - SDSD Captivate electronic learning module
 - one for court
 - one for attorneys/trustees