PACER ADMINISTRATIVE ACCOUNT (PAA)

The PACER Administrative Account (PAA) is a consolidated billing and online account management process for groups such as law firms, financial organizations and educational or research institutions. With a PAA, you can add or remove individual users from your account, manage pending requests, view all of the individual sub users linked to your account, update cost center information, enable the use of a client code, and view quarterly invoices, statements of account, and detailed transactions.

PAA Administrator

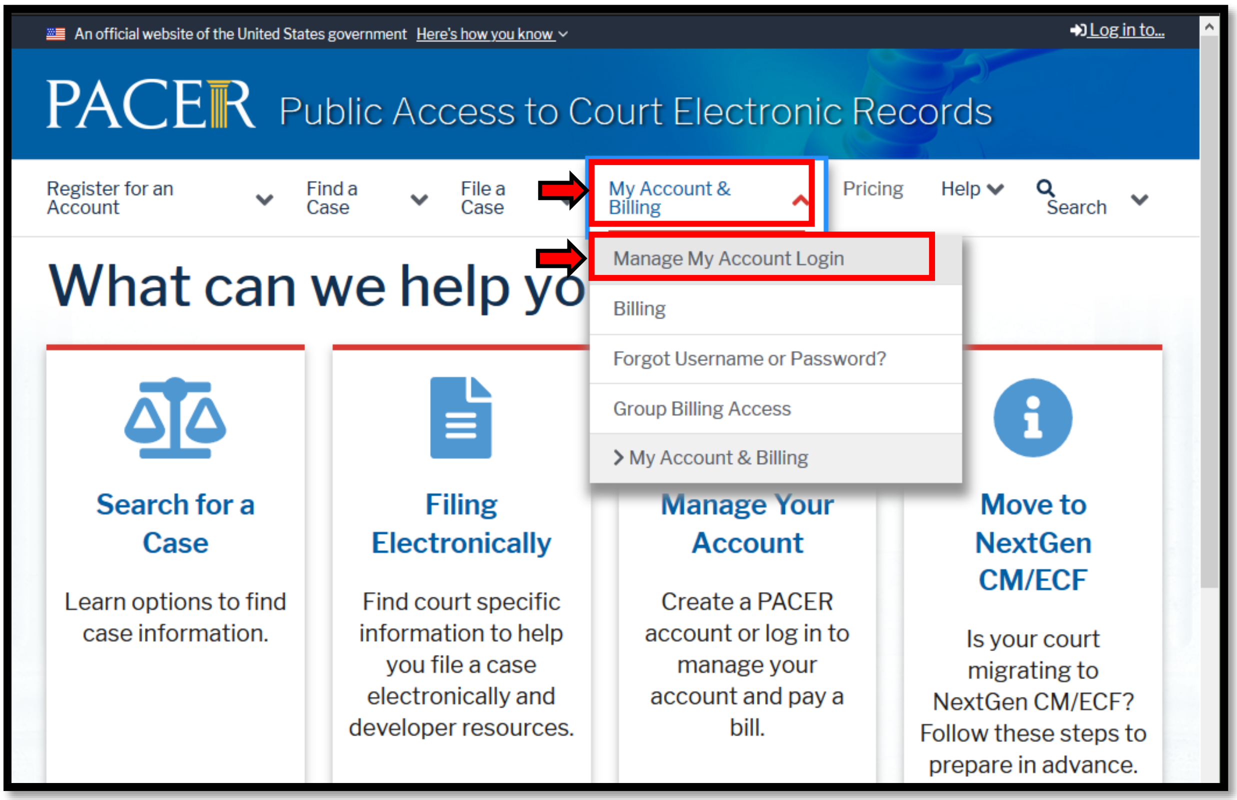
- The PAA is intended for administrative purposes only and does not provide access to case information. In addition, the PAA only manages PACER billing.
- Any e-filing or admissions fees paid to the court are managed through the individual's account.
- A PAA administrator is assigned to the PAA on behalf of the organization. This individual is responsible for the firm/organization's billing process.

PAA Billing Policies

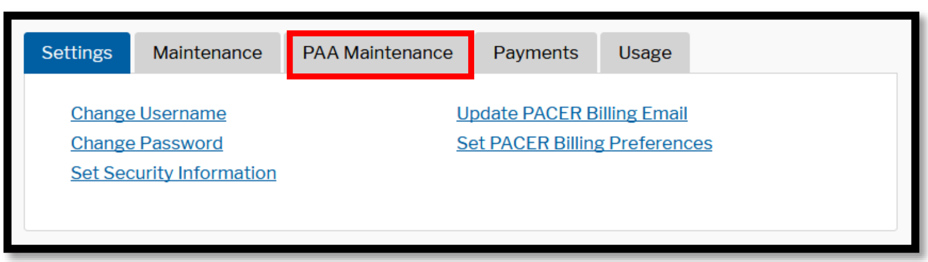
- All charges associated with each individual PACER account are accrued to the PAA.
- Total charges for all associated PACER accounts must be less than $30 per quarter in order for the PAA to qualify for the $30 fee waiver.
- The organization or firm is financially responsible for all associated PACER accounts.
- If the balance due on the PAA is not paid in full each quarter, access to the PACER service is suspended for all associated PACER accounts.
- The PAA is subject to the collection procedures described in the PACER Policies and Procedures (see document link)
- If the PAA has a past-due balance, new PACER accounts cannot be added.
- PACER Billing occurs in January, April, July, and October
- One invoice is generated for the PAA, which includes a summary of usage for each PACER account attached. Itemization of charges for each PACER account can be accessed through the PAA's Manage My Account section.
- A notification email is sent to the PAA administrator when the invoice is available for access.
- Invoices are not generated and sent to the individual PACER users associated with the PAA; however, each individual PACER user has access to view their detailed transaction history.

Locating the PAA Maintenance tab

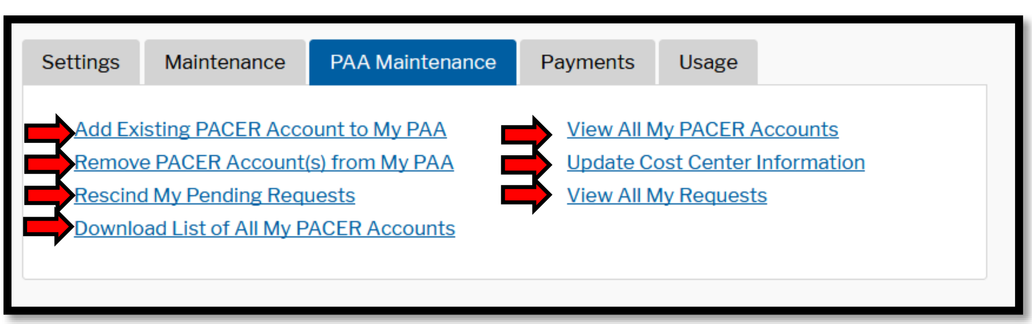
STEP 1 To manage your PAA account, go to www.pacer.gov. On the PACER home page, click ***My Account & Billing***, then select ***Manage My Account Login***. When prompted, enter your PAA username and password, then click Log In.



STEP 2 Once logged in, click on the PAA Maintenance tab.



STEP 3 Locate the PAA maintenance options. You will be able to add or remove an existing PACER user, rescind a pending request, download/view a list of attached PACER accounts, update cost center information, and view a list of all requests.

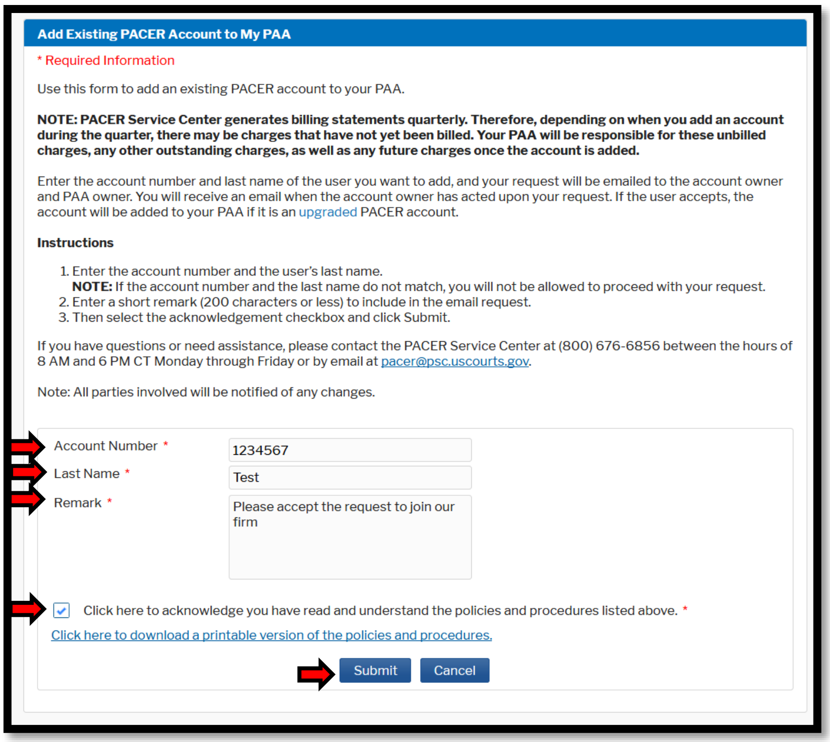


Add an Existing PACER Account to the PAA

This utility allows you to add an exisitng PACER account to your PAA for consolidated billing. This process requires the PAA account holder to send the end user a request to join, then the end user must accept the request before they are added to the PAA.

NOTE: Requests will expire if they are not acted upon within 15 days. If a request expires and you still want to add the account, you will have to initiate a new request.

STEP 1 Click *Add an Existing PACER Account to My PAA*. Please read the form. Once you are ready, enter the Account Number and Last Name for the account you want to add. Then enter a Remark; this is sent to the user, so you may customize your remark. Check the box to acknowledge the policies and procedures, then click Submit. This will send the end user an email request to join your PAA.



Add Existing PACER Account to My PAA

* Required Information

Use this form to add an existing PACER account to your PAA.

NOTE: PACER Service Center generates billing statements quarterly. Therefore, depending on when you add an account during the quarter, there may be charges that have not yet been billed. Your PAA will be responsible for these unbilled charges, any other outstanding charges, as well as any future charges once the account is added.

Enter the account number and last name of the user you want to add, and your request will be emailed to the account owner and PAA owner. You will receive an email when the account owner has acted upon your request. If the user accepts, the account will be added to your PAA if it is an upgraded PACER account.

Instructions

1. Enter the account number and the user's last name.
   NOTE: If the account number and the last name do not match, you will not be allowed to proceed with your request.
2. Enter a short remark (200 characters or less) to include in the email request.
3. Then select the acknowledgement checkbox and click Submit.

If you have questions or need assistance, please contact the PACER Service Center at (800) 676-6856 between the hours of 8 AM and 6 PM CT Monday through Friday or by email at pacer@psc.uscourts.gov.

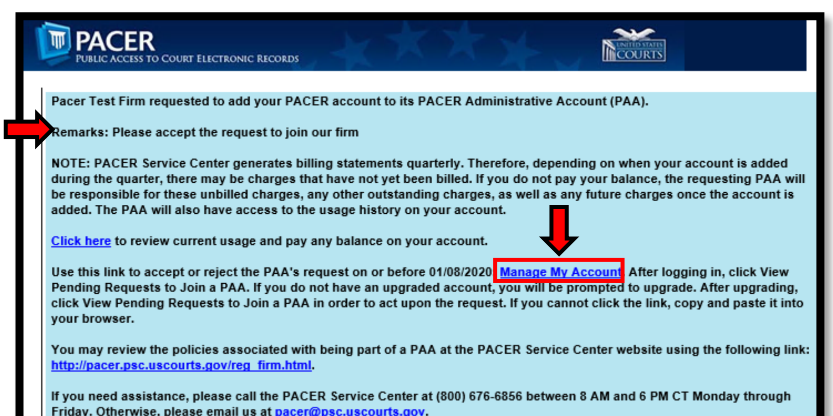
Note: All parties involved will be notified of any changes.

Account Number * 1234567
Last Name * Test
Remark * Please accept the request to join our firm

Click here to acknowledge you have read and understand the policies and procedures listed above. *
Click here to download a printable version of the policies and procedures.

Submit Cancel

STEP 2 The end user will receive an email with the request to join your PAA. This email will include the Remark entered and a link to *My Account & Billing*, where they can accept or reject the request.



PACER
PUBLIC ACCESS TO COURT ELECTRONIC RECORDS

Pacer Test Firm requested to add your PACER account to its PACER Administrative Account (PAA).

Remarks: Please accept the request to join our firm

NOTE: PACER Service Center generates billing statements quarterly. Therefore, depending on when your account is added during the quarter, there may be charges that have not yet been billed. If you do not pay your balance, the requesting PAA will be responsible for these unbilled charges, any other outstanding charges, as well as any future charges once the account is added. The PAA will also have access to the usage history on your account.

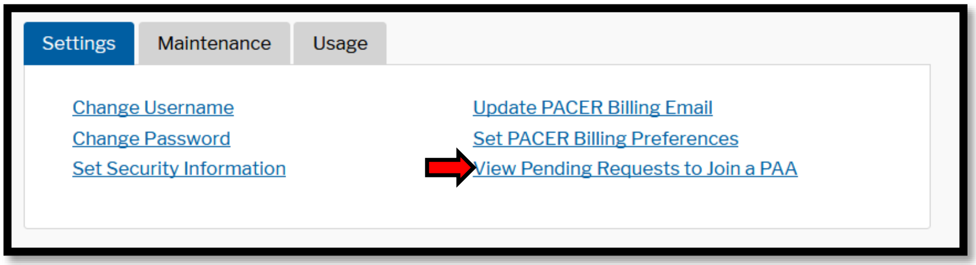
Click here to review current usage and pay any balance on your account.

Use this link to accept or reject the PAA's request on or before 01/08/2020 Manage My Account After logging in, click View Pending Requests to Join a PAA. If you do not have an upgraded account, you will be prompted to upgrade. After upgrading, click View Pending Requests to Join a PAA in order to act upon the request. If you cannot click the link, copy and paste it into your browser.

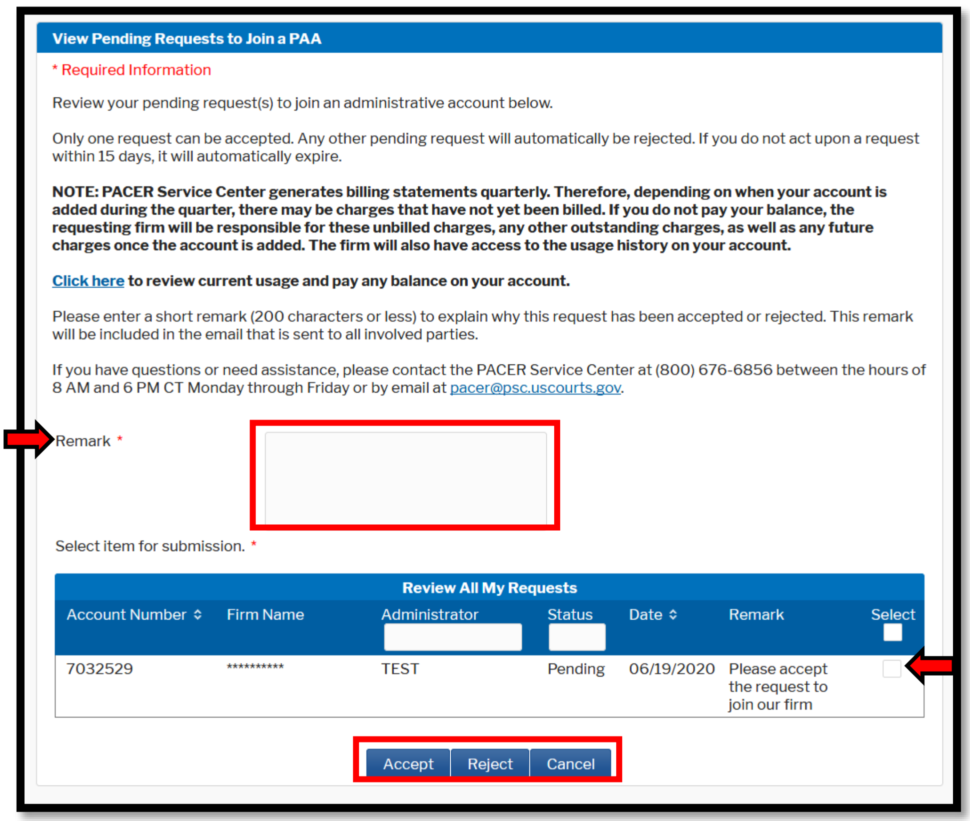
You may review the policies associated with being part of a PAA at the PACER Service Center website using the following link: http://pacer.psc.uscourts.gov/reg_firm.html.

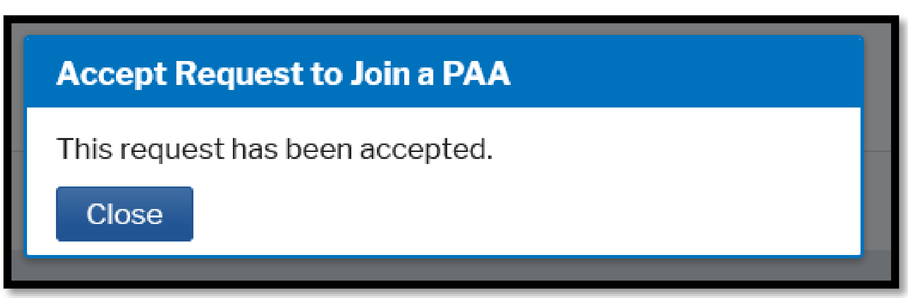
If you need assistance, please call the PACER Service Center at (800) 676-6856 between 8 AM and 6 PM CT Monday through Friday. Otherwise, please email us at pacer@psc.uscourts.gov.

STEP 3 Once the end user logs into *My Account & Billing*, they will have a new option under the Settings tab: *View Pending Request to Join a PAA*.



STEP 4 Read the instructions below. Enter a brief Remark, then check the box to select the Request you wish to act on. Then either Accept or Reject the request. If accepted, the account will be added to the PAA. The PAA account holder will receive a confirmation email with the Remark.

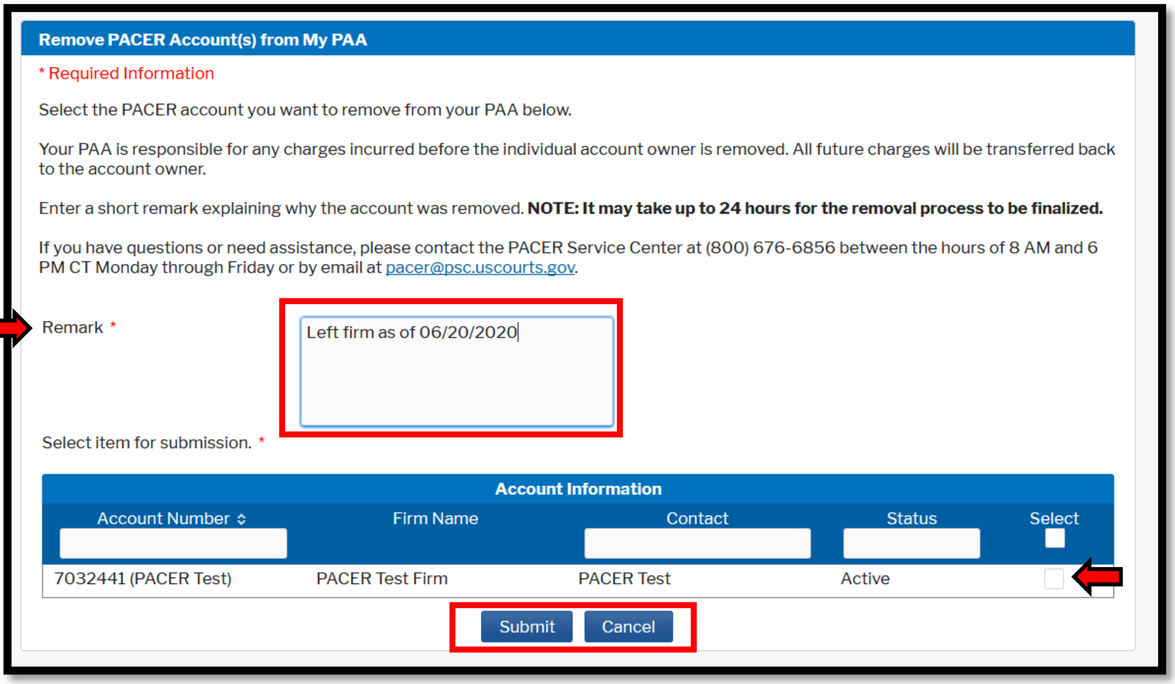




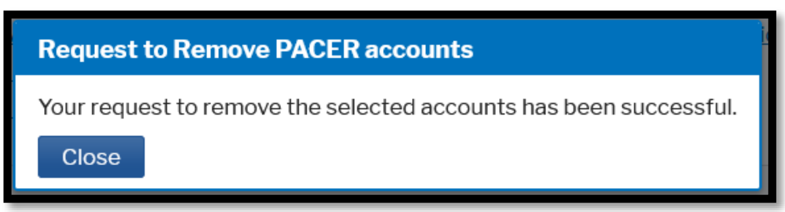
Remove PACER Account(s) from My PAA

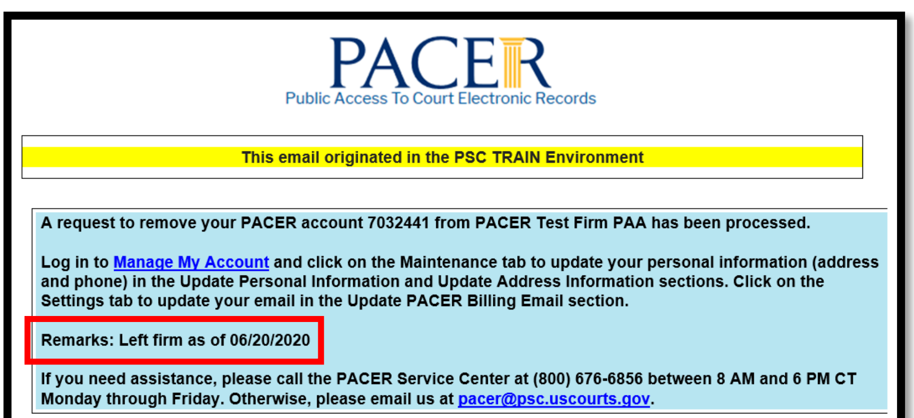
When a user leaves your firm or office, you have the option to remove their account from your PAA. Once an account is removed from the PAA, the PAA is no longer responsible for the billing on the removed account from that point onwards.

STEP 1 Click *Remove PACER Account(s) from My PAA.* Read the instructions below. Enter a brief Remark, and then check the box to select which account(s) you want to remove from your PAA. Click Submit to remove the account.



STEP 2 Once submitted, a confirmation window will appear. An email will be sent to the end user indicating the account has been removed with the Remark included.

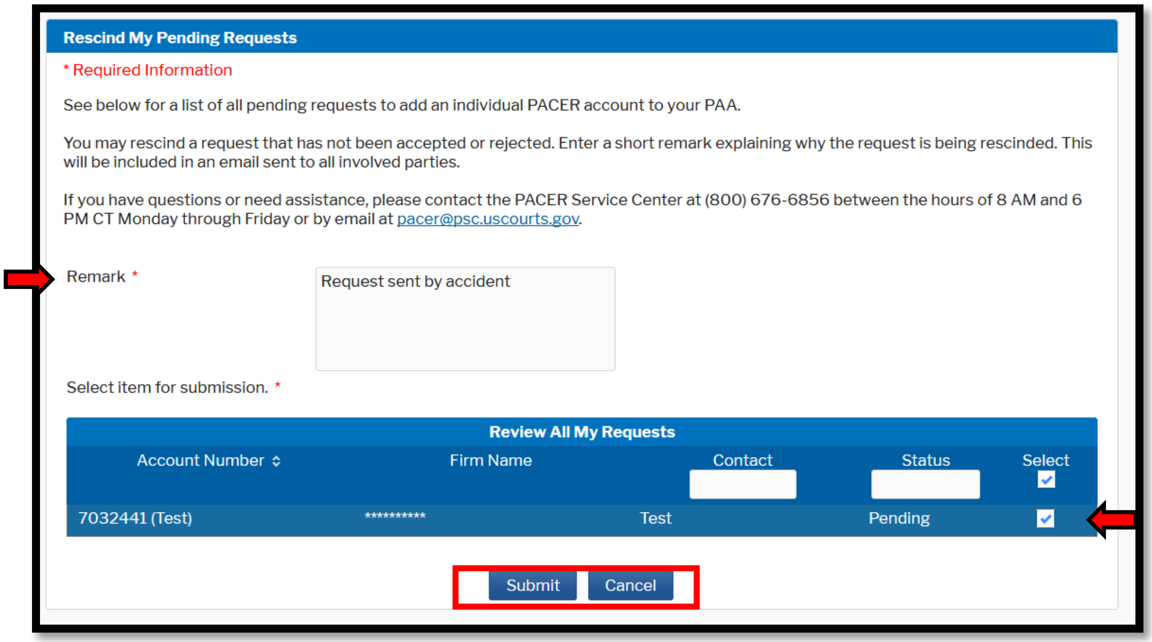




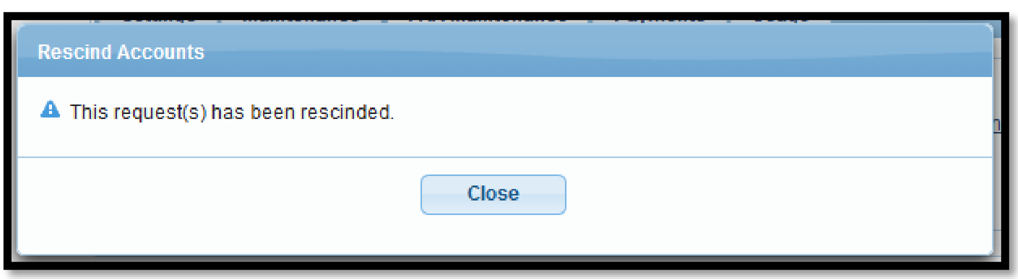
Rescind My Pending Requests

The PAA has the ability to rescind a request that has not yet been accepted or rejected.

STEP 1 Click *Rescind My Pending Requests*. Review the instructions. Enter a Remark, check the box to select the request your wish to rescind and then click Submit.



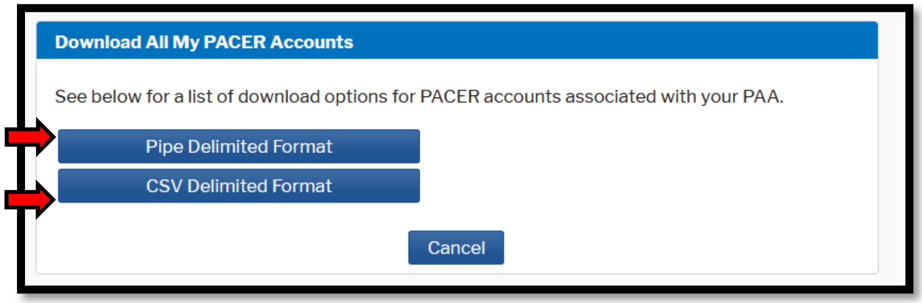
STEP 2 The request will then be rescinded and a confirmation will appear. The end user will not be added to the PAA. An email will be sent to the PAA and the end user with the Remark entered.

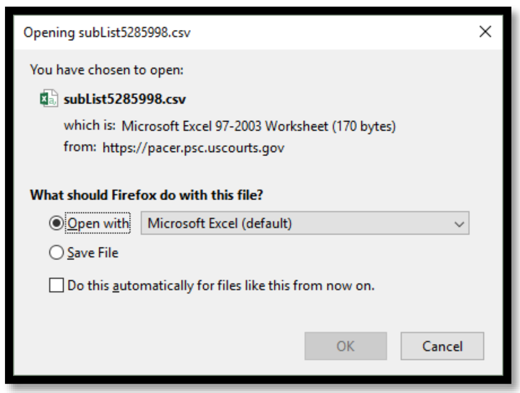


Download List of All My PACER Accounts

You may download a list of the PACER accounts attached to the PAA in Pipe Delimited or CSV Format. This can allow you to import that data into a program of your choosing (e.g. Microsoft Excel).

STEP 1 Click *Download List of All My PACER Accounts*. Then select the format. Depending on your browser settings, it may start downloading the file or a dialogue box will appear.

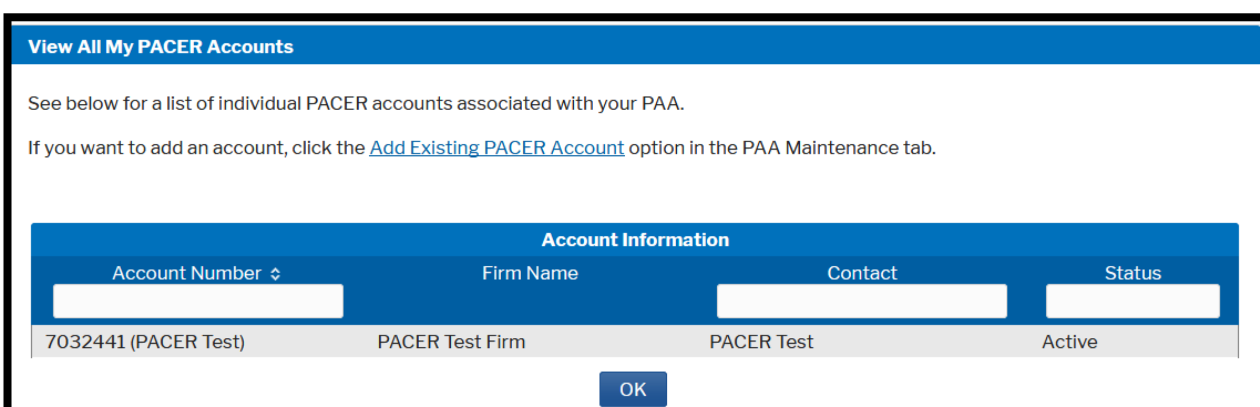




View All My PACER Accounts

You may view a list of the PACER accounts attached to your PAA. This list will display the account number, firm name listed on the individual account (if any), the contact listed on the individual account, and the current account status.

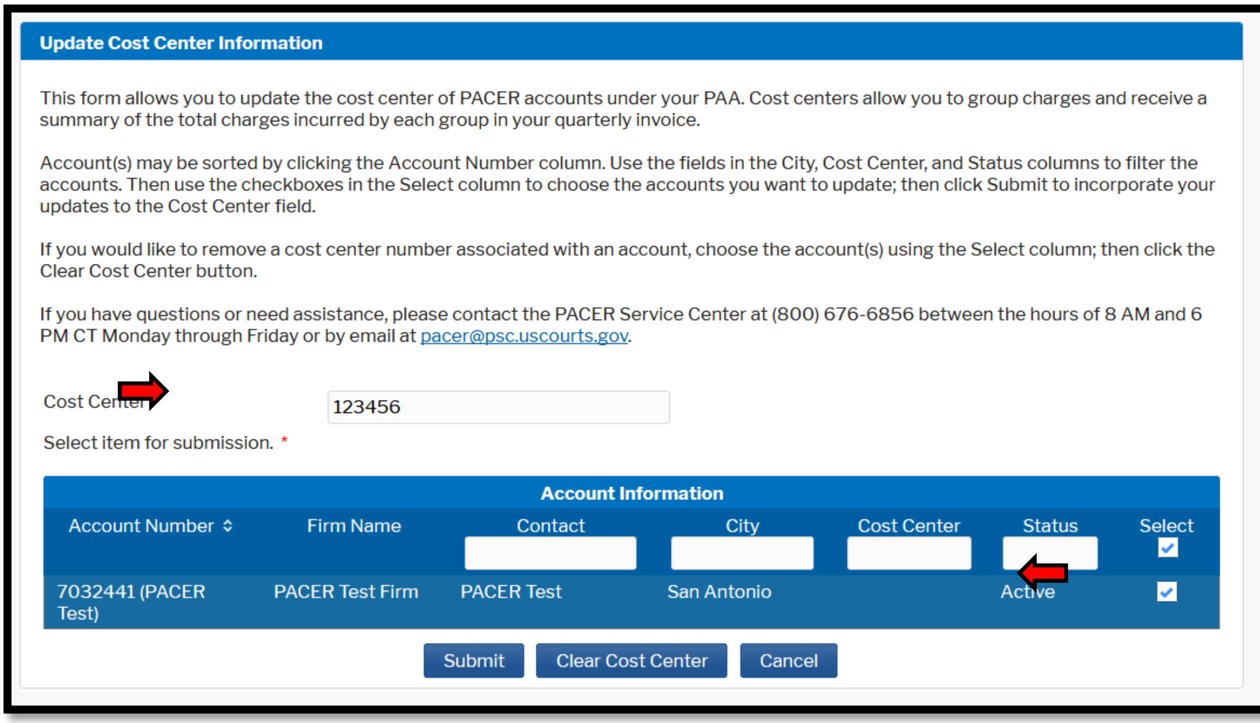
STEP 1 Click *View All My PACER Accounts*. You can filter based on account number, contact name, and status.



Update Cost Center Information

You may update or assign various individual accounts attached to your PAA to a cost center code. This allows the PAA to group charges together under a customizable cost code. You can also filter the accounts based on contact name, city, cost center code, and status.

STEP 1 Click *Update Cost Center Information.* Review the provided instructions. If you wish to add an account to a cost center code, enter your preferred cost center code and then check the box to select the accounts you wish to add. Once selected, click Submit to apply the cost center code. A confirmation box will appear. Once closed, you will be returned to the prior page and you can see your changes.



Update Cost Center Information

This form allows you to update the cost center of PACER accounts under your PAA. Cost centers allow you to group charges and receive a summary of the total charges incurred by each group in your quarterly invoice.

Account(s) may be sorted by clicking the Account Number column. Use the fields in the City, Cost Center, and Status columns to filter the accounts. Then use the checkboxes in the Select column to choose the accounts you want to update; then click Submit to incorporate your updates to the Cost Center field.

If you would like to remove a cost center number associated with an account, choose the account(s) using the Select column; then click the Clear Cost Center button.

If you have questions or need assistance, please contact the PACER Service Center at (800) 676-6856 between the hours of 8 AM and 6 PM CT Monday through Friday or by email at pacer@psc.uscourts.gov.

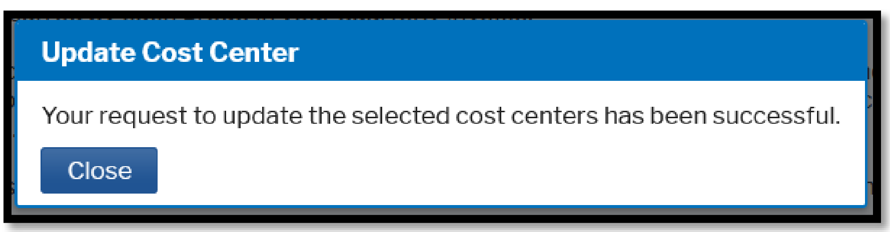
Cost Center 123456

Select item for submission. *

Account Information

Account Number	Firm Name	Contact	City	Cost Center	Status	Select
7032441 (PACER Test)	PACER Test Firm	PACER Test	San Antonio		Active	☑

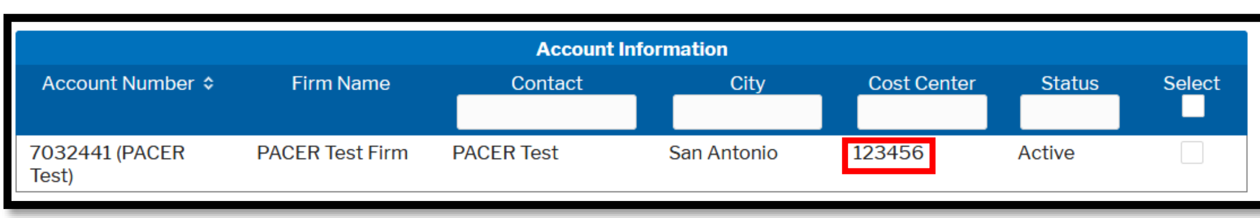
Submit Clear Cost Center Cancel



Update Cost Center

Your request to update the selected cost centers has been successful.

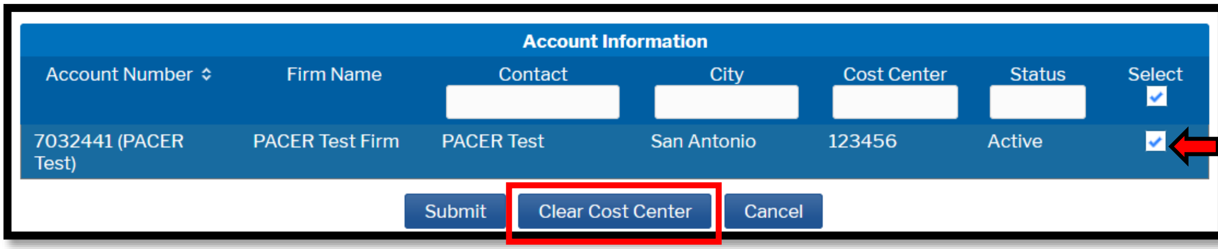
Close

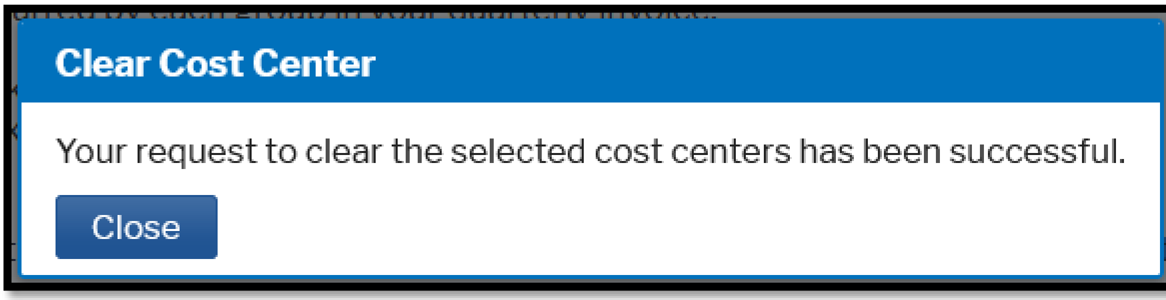


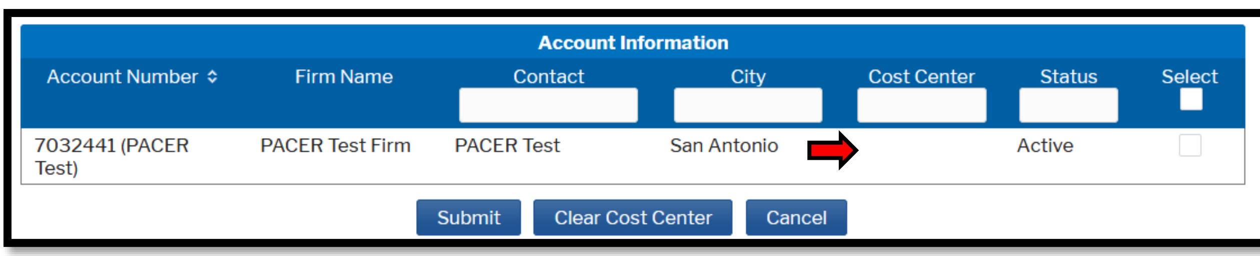
Account Information

Account Number	Firm Name	Contact	City	Cost Center	Status	Select
7032441 (PACER Test)	PACER Test Firm	PACER Test	San Antonio	123456	Active	☐

STEP 2 You can also clear or remove the cost center, if you wish. To do so: Check the box for the accounts you wish to remove the cost center code, then click Clear Cost Center. A confirmation box will appear. Once closed, you will be returned to the prior page and you can see your changes.

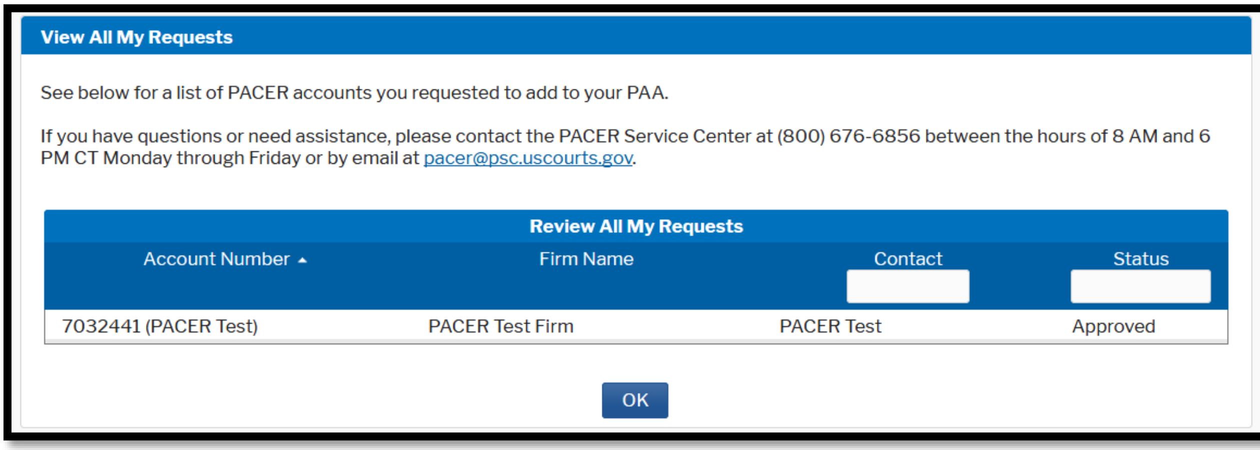






View All My Requests

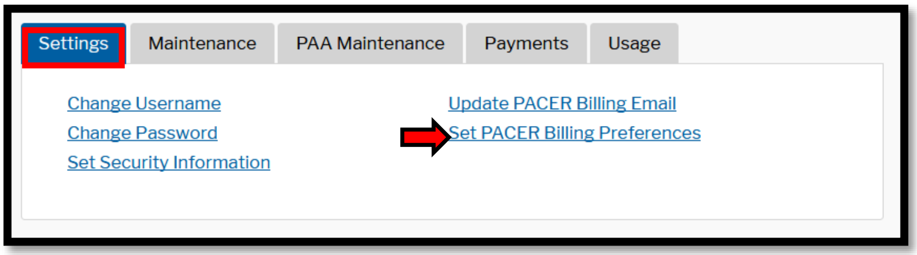
You may view a history of requests to add PACER accounts to your PAA. You can sort the list by account number or filter based on contact name and status of the request. Possible statuses included Approved, Expired, Rescinded, and Remove Login.



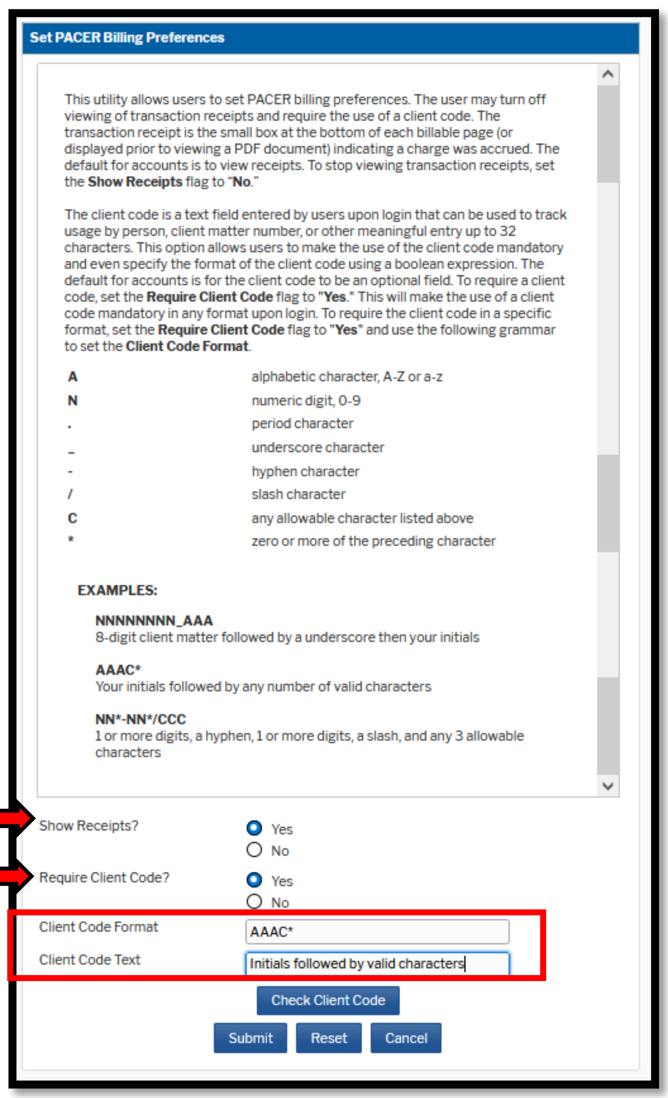
Set PACER Billing Preferences

The PAA has the ability to manage the billing preferences of all accounts attached. This can allow the PAA to show or hide the receipts on the transactions for the individuals. Additionally, the PAA can mandate the use of a client code and set the criteria for that client code.

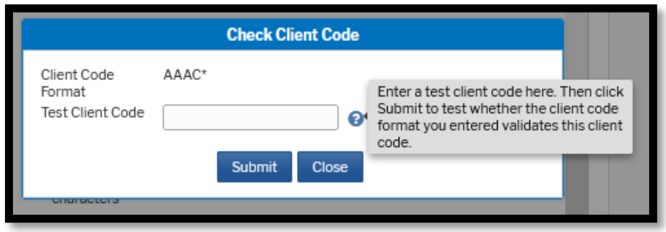
STEP 1 Click on the *Settings* tab. Click *Set PACER Billing Preferences*.



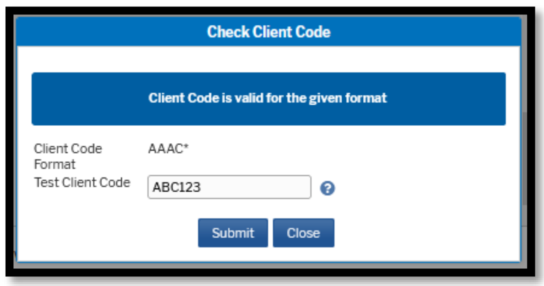
STEP 2 Review the instructions listed. Here you can show or hide transaction receipts and/or implement a client code requirement. You can set the format for the client code and set a Client Code Text or "hint" to help remind your user of the client code format. Use the legend included to set the Client Code to your liking.



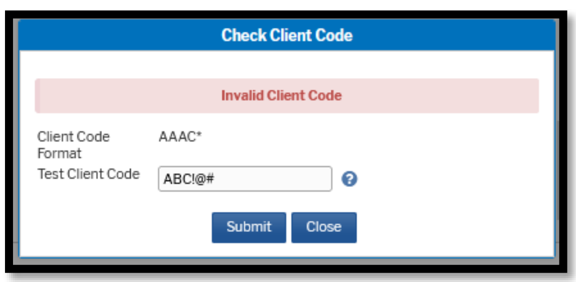
STEP 3 After you have set a Client Code Format, you can test the Client Code by clicking Check Client Code. Here you can enter various examples of client codes and see if they fit the format set.



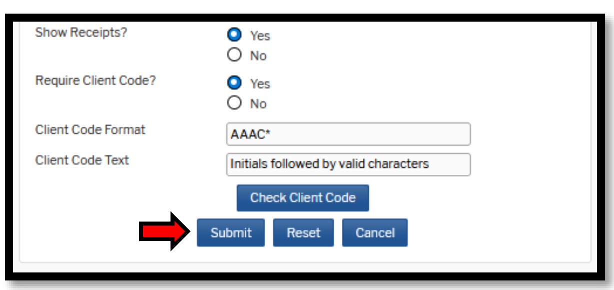
If the Test Client Code meets the format criteria, you will receive a valid Client Code message.

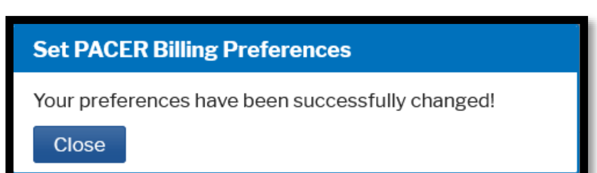


If the Test Client Code does not meet the format criteria, you will receive an invalid Client Code message.



STEP 4 Once you have set your preferences and are ready, click Submit to apply to your PAA and all PACER accounts attached. A confirmation box will appear.





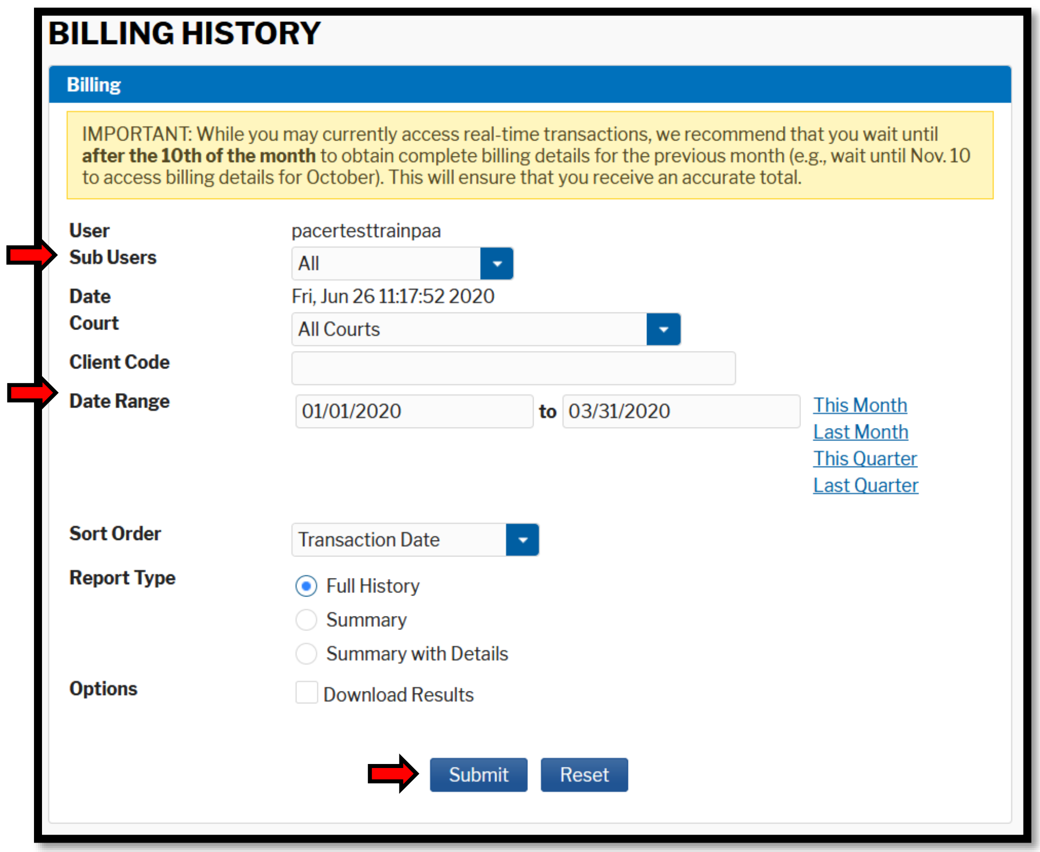
View Detailed Transactions

The PAA has the ability to review detailed transactions for all accounts attached. This utility allow you filter between all users or a specific user. You can also filter by Court, Client Code, Date Range, and Transaction Type (if applicable).

STEP 1 Click the *Usage* tab. Then click *View Detailed Transactions*.

STEP 2 Select the Sub Users whose transactions you wish to view. If you want to view all, select All from the dropdown. It is not necessary, but you can select a specific Court or a specific Client Code. You must select a Date Range; to the right are presets for the date range. To sort the transactions, use Sort Order. Once ready, click Submit.

NOTE: By default, this report will show an itemized list of transactions. The options for Summary and Summary Details will summary this report and allow you to see a brief breakdown of the transactions. The Download function will allow you to download the transaction details



STEP 2 If you wish to download the transaction data to export into another program (e.g. Microsoft Excel), check the box for Download Results before clicking Submit. On the following page, you can select what file type in which to download the data.