PACER Administrative Account (PAA)

Policies and Procedures

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A. Overview

The PACER Service Center (PSC) has developed the PACER Administrative Account (PAA), a consolidated billing and online account management process for groups — such as law firms, non-profit organizations, educational or research institutions — to manage and pay for all charges associated with multiple PACER logins (i.e. PACER account) within their group at an organizational level.

NOTE: The PAA has replaced the master account.

The PAA includes the following features:

- Choose which firm accounts to roll into the PAA by adding existing logins.
- Set up new logins for the firm PACER users and receive login information immediately.
- Activate and deactivate individual logins, as needed.
- Update user information for a login.

B. PAA Administrator

The PAA can only be used for administrative purposes and does not provide access to case information. A PAA administrator is assigned to the PAA on behalf of the organization.

This individual is responsible for the firm billing process, PACER login management and serves as the first point of contact for all PACER logins associated with the PAA.

C. Firm Billing Process

- All charges associated with each individual PACER login are accrued to the PAA.
- Total charges for all associated PACER logins must be less than $15 per quarter in order for the PAA to qualify for the $15 waiver.

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- The PAA administrator is financially responsible for all associated PACER logins.
- If the balance due on the PAA is not paid in full each quarter, access to the PACER service is suspended for all PACER logins that are associated with the PAA.
- The PAA is subject to the collection procedures described in the PACER Policies and Procedures document (http://pacerdev.psc.uscourts.gov/documents/pacer_policy.pdf).
- If the PAA has a past due balance, then new PACER logins cannot be created.
- PACER billing occurs in January, April, July and October.
- One invoice is generated for the PAA. Itemization of charges for each PACER login are included in the invoice.
- A notification email is sent to the PAA administrator when the PAA invoice is available on the PACER website (www.pacer.gov).
- Invoices are not generated and sent to PACER users associated with a PAA, however, PACER users have access to view their detailed transaction history.

D. Add Existing PACER Login(s) to the PAA

The PAA administrator may request to add an unlimited number of PACER logins to the PAA through the PACER website.

NOTE: The existing PACER user must accept the request before their PACER login is added to the PAA. Once added, the PAA administrator has administrative rights over the PACER login(s) and is responsible for all charges incurred by the associated PACER login(s). Refer to the **Firm Billing Process** section for details.

To add an existing PACER login:

1. Login to **Manage My PACER Account** (www.pacer.gov).

   NOTE: Enter the **PAA Account ID** in the **Login** field.

2. From the **Login Maintenance** section, click **Add Existing Logins.**
3. Enter the existing PACER login in the **Login ID** field.
4. Click **Add Login**.

   NOTE: You may add multiple PACER logins before submitting this request.

5. Enter a brief message (i.e. adding to PAA, request to consolidate billing, etc.) that explains the nature of the request in the **Remark** field.

   NOTE: Remarks cannot exceed 200 characters and are included in the auto-generated email that is sent to the PACER user(s).

6. Read the Policies and Procedures and check the **Acknowledgement** box.
7. Click **Submit Form** to submit the request. *An email is sent to the PACER user's email address that contains a hyperlink to log in to **Manage My PACER Account** and accept the request to join the PAA.* .

   NOTE: The request to join the PAA expires after 15 days.

The PACER user must:

8. Log into **Manage My PACER Account** using their PACER login ID and password.
9. If security information is not on file for the PACER user, the user will be prompted to add a security question and answer, and date of birth.
10. From the **Review Request to Join a Group** page, select approve or reject.

    NOTE: PACER users that are associated with a PAA have limited access to perform account maintenance for their PACER login/account. For example, the PACER user does not have access to update the firm name, contact information or the email address and must be completed by the PAA administrator.

E. Create a New PACER Login

The PAA administrator may create a new PACER login that is automatically added to the PAA.

1. Login to **Manage My PACER Account** (www.pacer.gov).

   NOTE: Enter the **PAA Account ID** in the **Login** field.
2. From the **Login Maintenance** section, click **Create New Logins**.
3. Enter the PACER user's full name in the **User** field and email address.
4. Enter a general security question (i.e., Where do you work?) and answer, and date of birth (i.e., 01/01/10).

   NOTE: This information must be provided to the PACER user to retrieve the password electronically.
5. Read the Policies and Procedures and check the **Acknowledgement** box.
6. Click **Submit Form** to submit the request. *An email is sent to the PACER user's email address that contains a hyperlink to retrieve the password.*

   NOTE: The password retrieval link expires after 15 days.
7. Provide the above answers to the PACER user and notify them of incoming password retrieval email.

The new PACER user must:

8. Click the password retrieval link.
9. Answer the general security question and date of birth (provided by the PAA administrator).

10. Enter new security information.

    NOTE: New security information must be entered before the password is displayed.

11. The PACER user may change the system-generated password by logging into (www.pacer.gov).

    NOTE: There is a delay of approximately 1 hour before the new password can be used for case searches, etc.

F. Deactivate/Reactivate a PACER Login

The PAA administrator must:

1. Login to Manage My PACER Account (www.pacer.gov).

   NOTE: Enter the PAA **Account ID** in the **Login** field.

2. From the Login Maintenance section:

   - Click **Deactivate Logins** to deactivate a PACER login.
   - Click **Activate Logins** to activate an inactive or cancelled PACER login.

3. Select the applicable PACER user and click the **Activate/Deactivate** checkbox.

   NOTE: The deactivation and reactivation process takes approximately 1 hour.

G. Update a PACER Login

The PAA administrator may update the firm name, user, address, phone number or email address for each PACER login associated with the PAA.

NOTE: If the PACER user has forgotten their password, they must navigate to the PACER website (www.pacer.gov) and select **Request Forgotten Password**. The PAA administrator cannot retrieve a forgotten password for any associated PACER logins.

The PAA administrator must:

1. Login to **Manage My PACER Account** (www.pacer.gov).

   NOTE: Enter the **PAA Account ID** in the **Login** field.

2. From the **Login Maintenance** section, click **Update Login Information**.

3. Select the applicable PACER login from the **Login ID** field and complete the desired changes.

4. If reassigning the PACER login to another user, select the **Change Security Information** checkbox.

5. Enter a general security question (i.e., Where do you work?) and date of birth (i.e., 01/01/10).

   NOTE: This information must be provided to the PACER user to retrieve the password electronically.

6. Click **Submit** to process the account information changes. *An email is sent to the PACER user's email address that contains a hyperlink to retrieve the password.*
7. Provide the above answers to the PACER user and notify them of the incoming password retrieval email.

   NOTE: The password retrieval link expires after 15 days.

The PACER user must:

8. Click the password retrieval link.
9. Answer the general security question and date of birth (provided by the PAA administrator).
10. Enter new security information
11. Enter a new password that is exactly 8 characters long and contains at least 2 numbers and 2 letters.

    NOTE: There is a delay of approximately 1 hour before the new password can be used for case searches, etc.

H. Retrieve Quarterly Invoice and/or View Billing Information

The PAA administrator may download the quarterly invoice and view detailed transaction for all PACER users associated with the PAA.

1. Login to **Manage My PACER Account** (www.pacer.gov).

   NOTE: Enter the **PAA Account ID** in the **Login** field.

2. From the **Usage History** section, select **Review Quarterly Invoice/Statement of Account** or **Review Detailed Transactions**.

   NOTE: Select **Review Detailed Transactions** to view or download usage for all PACER logins in one report or for each login individually, including sorting by client code.

3. A list of PACER logins that include the usage total for each[1] can also be generated.
   - Select **Review Detailed Transactions**.
   - Select **ALL** for the **Select Account** prompt and click **OK**.
   - Enter the date range for the desired report.
   - Select **Login/Court** for **Sort Options**.
   - Select **Totals Only** for **Display Options**.
   - Click **Run Report**.

[1] The usage total is based on the date range entered in the "Review Detailed Transactions" report for all logins.

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I. Change the Client Code Field to Mandatory

The client code is used to track usage by person, client matter number, or other meaningful entry (up to 32 characters). The PAA administrator may require that each PACER user associated with the PAA enter a client code at login by completing the following:

1. Login to **Manage My PACER Account** (www.pacer.gov).

   NOTE: Enter the PAA Account ID in the Login field.

2. Click **Set Account Preferences**. *See webpage for detailed instructions.*

   NOTE: Select the **Check Client** button to ensure the format meets your requirements.

3. Enter the client code text.

   NOTE: This is the message the associated PACER users will receive if they fail to enter a client code at login.