PACER Administrative Account (PAA) Policies and Procedures

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PACER Administrative Account (PAA)
Policies and Procedures

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, financial organizations and educational or research institutions.

The PAA includes the following features:

- The PAA administrator chooses which accounts to link to the PAA and sends an invitation to the individual user.
- The user may link his/her account to the PAA by accepting the request to join the PAA.
- Each user is an account owner and will take that same account to a new firm, where it can be linked to that organization's PAA.
- Individual users make updates to their own account.
- Either the PAA owner or the individual account owner will be able to unlink the account from a PAA when an attorney leaves.

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.

Firm Billing Policies

- All charges associated with each individual PACER account 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.
- 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 document (https://www.pacer.gov/documents/pacer_policy.pdf).
- If the PAA has a past-due balance, new PACER accounts cannot be linked.
- PACER billing occurs in January, April, July, and October.
- One invoice is generated for the PAA. Itemization of charges for each PACER account is included in the invoice.
- A notification email is sent to the PAA administrator when the PAA invoice is available on the PACER website.
- Invoices are not generated and sent to PACER users associated with a PAA; however, PACER users have access to view their detailed transaction history.

PACER Administrative Account (PAA)
Policies and Procedures

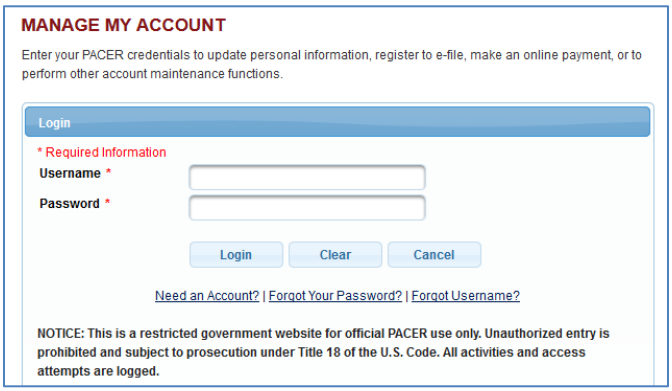
Add Existing PACER Account(s) to the PAA

The PAA administrator may request to link an unlimited number of individual PACER accounts to the PAA through the PACER website.

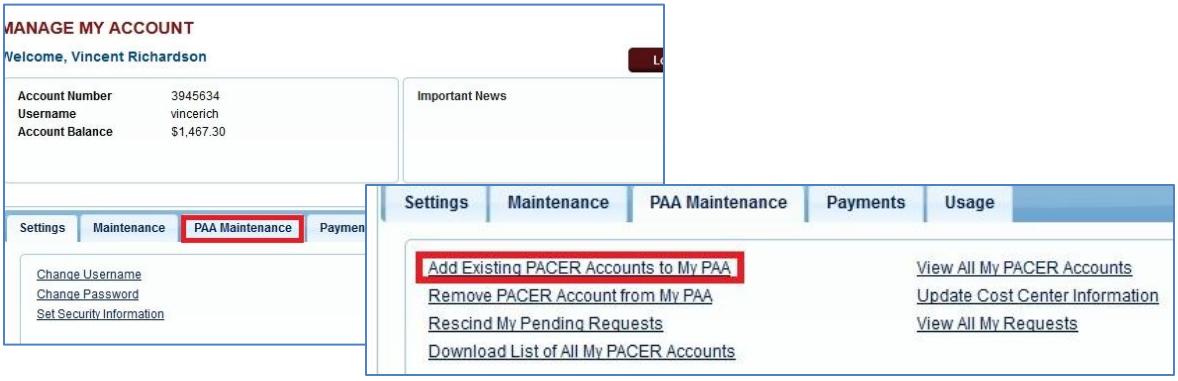
> **NOTE:** The user must accept the request before an account is added to the PAA. The firm or organization is then responsible for all charges incurred by that account.

To add an existing PACER account:

1. Log in to **Manage My Account**.



2. Click the **PAA Maintenance** tab and select **Add Existing PACER Accounts to My PAA**.



3. Enter the last name and PACER account number in the **Account Number** field.

4. Enter a brief message (e.g., adding to PAA, request to consolidate billing) that explains the nature of the request in the **Remark** field. Then click **Add**.

> **NOTE:** Your remark should be between 10 and 200 characters. This is included in the request email sent to the user.

PACER Administrative Account (PAA)
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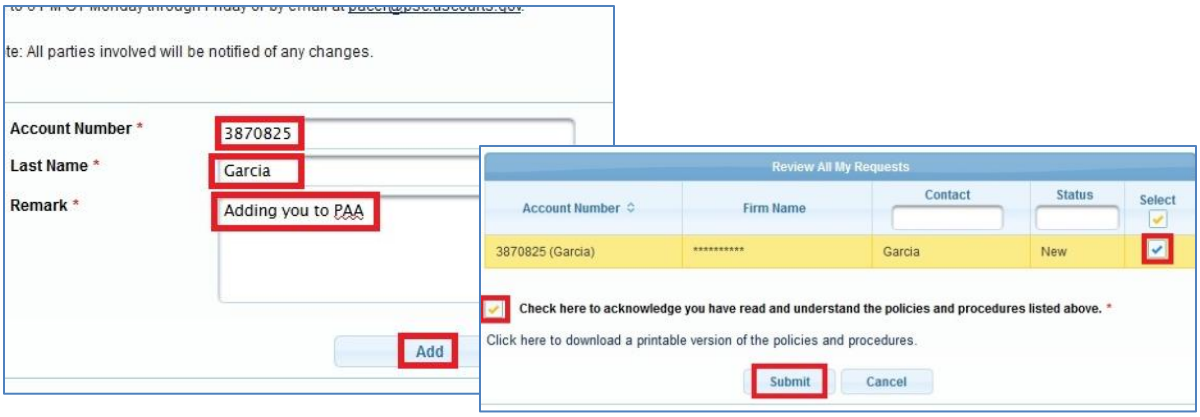


5. Select the checkbox for the account you want to add under Review All My Requests.

6. Read the policies and procedures and click the acknowledgement box. Click **Submit**.

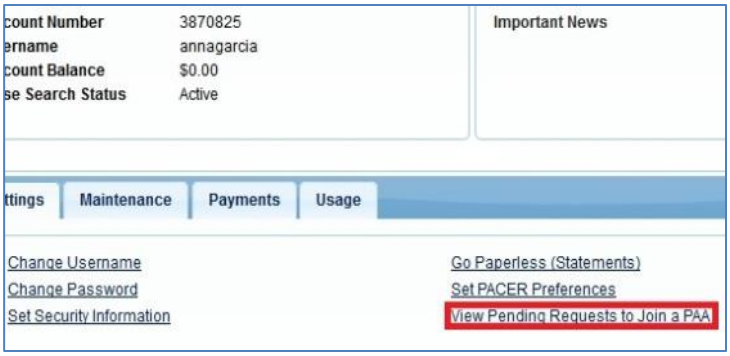
> **NOTE:** An email is sent to the PACER user that contains a hyperlink to accept the request to join the PAA. The request expires after 15 days.

The PACER user must:

7. Log in to **Manage My Account**.

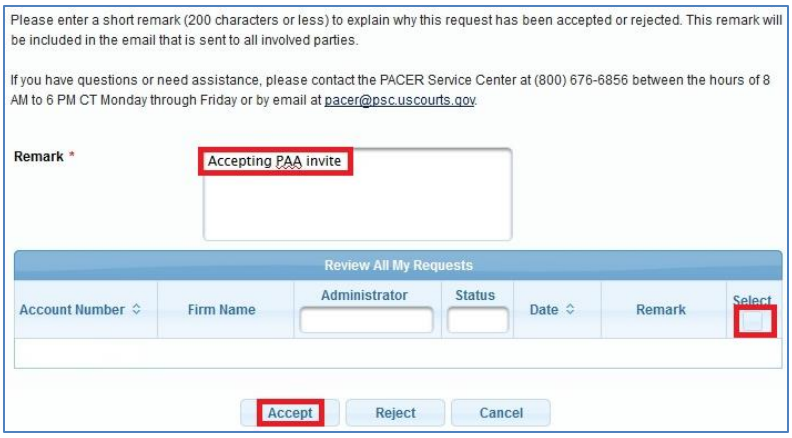
8. Under Settings, click **View Pending Requests to Join a PAA**.

9. Enter a brief message in the **Remark** field (e.g., accept PAA invite).



> **NOTE:** The remark should be between 10 and 200 characters. This is included in the request email sent to the user.

10. Click the **Select** checkbox to select the desired request. Click **Accept**.

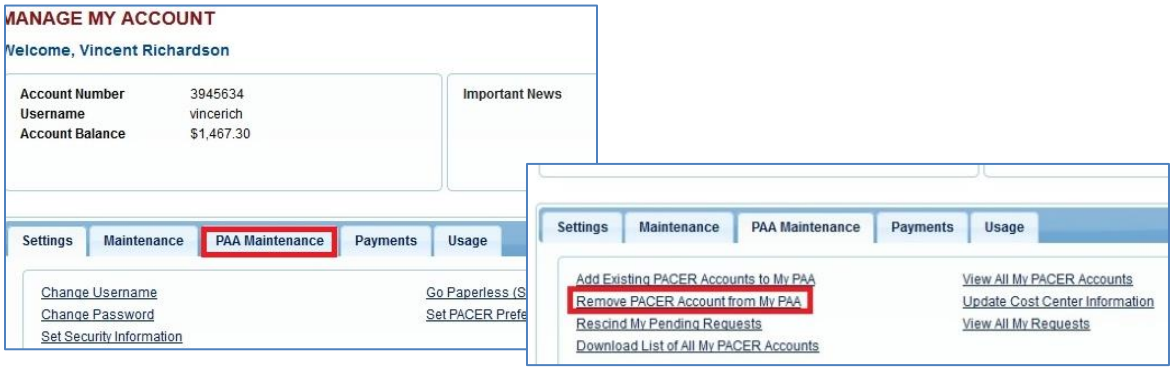


Unlink a PACER Account

The PAA administrator must:

1. Log in to **Manage My Account**.

2. In the PAA Maintenance tab, click **Remove PACER Account from My PAA**.



3. Enter a brief message in the **Remark** field (e.g., Removing PAA).

4. In the Account Information section, click the **Select** checkbox next to the user you want to unlink from your PAA.

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

Remark * Removing from PAA

Account Information

Account Number	Firm Name	Contact	Status	Select
3716159 (LB4729)	Lewis Brisbois Bisgaard & Smith	V Richardson	Active	
3772690 (LB4947)	Lewis Brisbois Bisgaard & Smith, LLP	Nicholas Carre	Active	
3782466 (LB4986)	Lewis Brisbois Bisgaard & Smith	V Richardson	Active	
3873420 (LB5318)	Lewis Brisbois Bisgaard & Smith	Vincent Richardson	Active	
3875273 (LB5322)	Lewis Brisbois Bisgaard & Smith LLP	Ivan D Smith	Active	
3428632 (LB3552)	Lewis Brisbois Bisgaard & Smith	Kate Burmon	Active	
3870825 (annagarcia)	PACER Test Account	Anna Marie Garcia	Active	✓

5. Click **Submit**.

3319777	Lewis Brisbois Bisgaard & Smith	R Cannoy	Cancelled	
3319778	Lewis Brisbois Bisgaard & Smith	R Cannoy	Inactive	

(1 of 4) 1 2 3 4

Submit Cancel

View Billing Information and/or View Quarterly Invoice

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

1. Log in to **Manage My Account**.

2. Click the **Usage** tab, and select **View Detailed Transactions** to view or download usage for all PACER accounts in one report or for each account, including sorting by client code.

MANAGE MY ACCOUNT
Welcome, Vincent Richardson
Logout

Account Number 3945634
Username vincerich
Account Balance $1,467.30

Important News

Settings | Maintenance | PAA Maintenance | Payments | Usage

Change Username
Change Password
Set Security Information
Go Paperless (Statements)
Set PACER Preferences

MANAGE MY ACCOUNT
Welcome, Vincent Richardson
Logout

Account Number 3945634
Username vincerich
Account Balance $1,467.30

Important News

Settings | Maintenance | PAA Maintenance | Payments | Usage

View Quarterly Invoice / Statement of Account
View Detailed Transactions

PACER Administrative Account (PAA)
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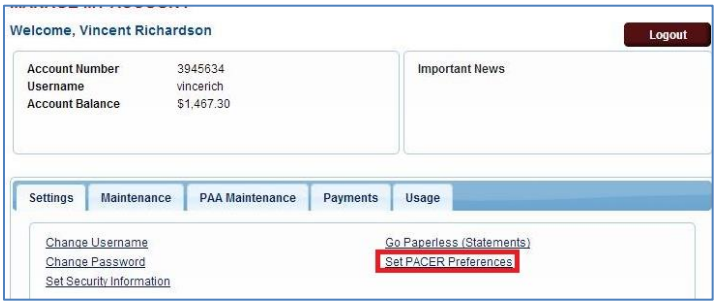
Change the Client Code Field to Mandatory

The Client Code option allows you to track charges for future billings. The PAA administrator may require that each PACER user associated with the PAA enter a client code at login by completing the following:

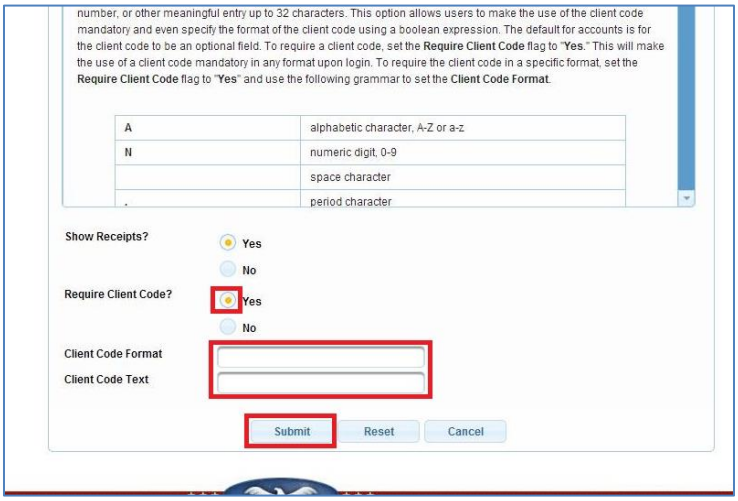
1. Log in to **Manage My Account**.

2. In the Settings tab, click **Set PACER Preferences**.



3. Select the **Yes** option next to Require Client Code? When you do this, two additional fields will appear.

4. Use the instructions at the top of the page to decide on the client code format. Enter the **client code format** in the Client Code Format field.

5. Enter the **client code** in the Client Code Text field.

6. Click **Submit**.