

# **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](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.

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**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.

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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**.

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

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## PACER Administrative Account (PAA) Policies and Procedures

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**.

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**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.

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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).

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

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# PACER Administrative Account (PAA) Policies and Procedures

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

Please enter a short remark (200 characters or less) to explain why this request has been accepted or rejected. This remark will be included in the email that is sent to all involved parties.

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](mailto:pacer@psc.uscourts.gov)

Remark \*

Review All My Requests						
Account Number	Firm Name	Administrator	Status	Date	Remark	Select
						<input type="checkbox"/>

## 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**.

**MANAGE MY ACCOUNT**  
Welcome, Vincent Richardson

Account Number: 3945634	Important News
Username: vincerich	
Account Balance: \$1,467.30	

Settings Maintenance **PAA Maintenance** Payments Usage

<a href="#">Change Username</a>	<a href="#">Go Paperless (S)</a>	<a href="#">View All My PACER Accounts</a>
<a href="#">Change Password</a>	<a href="#">Set PACER Prefe</a>	<b><a href="#">Remove PACER Account from My PAA</a></b>
<a href="#">Set Security Information</a>		<a href="#">Rescind My Pending Requests</a>
		<a href="#">Update Cost Center Information</a>
		<a href="#">View All My Requests</a>
		<a href="#">Download List of All My PACER Accounts</a>

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.

# PACER Administrative Account (PAA) Policies and Procedures

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Remark \*

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

5. Click **Submit**.

3319777	Lewis Brisbois Bisgaard & Smith	R Cannoy	Cancelled	<input type="checkbox"/>
3319778	Lewis Brisbois Bisgaard & Smith	R Cannoy	Inactive	<input type="checkbox"/>

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## [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

Account Number 3945634  
Username vincerich  
Account Balance \$1,467.30

Important News

Settings Maintenance PAA Maintenance Payments **Usage**

[Change Username](#) [Go Paperless \(Statements\)](#)  
[Change Password](#) [Set PACER Preferences](#)  
[Set Security Information](#)

**MANAGE MY ACCOUNT**  
Welcome, Vincent Richardson

Account Number 3945634  
Username vincerich  
Account Balance \$1,467.30

Important News

Settings Maintenance PAA Maintenance Payments Usage

[View Quarterly Invoice / Statement of Account](#)

# PACER Administrative Account (PAA) Policies and Procedures

## 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**.

The screenshot shows the user interface for a PACER Administrative Account. At the top, it says "Welcome, Vincent Richardson" and has a "Logout" button. Below this, there are two columns of account information: "Account Number" (3945634), "Username" (vincerich), and "Account Balance" (\$1,467.30) on the left; and "Important News" on the right. Below the account information is a navigation bar with tabs for "Settings", "Maintenance", "PAA Maintenance", "Payments", and "Usage". Under the "Settings" tab, there are links for "Change Username", "Change Password", "Set Security Information", "Go Paperless (Statements)", and "Set PACER Preferences". The "Set PACER Preferences" link is highlighted with a red box.

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**.

The screenshot shows the "Set PACER Preferences" form. At the top, there is a paragraph of text explaining the client code format: "number, or other meaningful entry up to 32 characters. This option allows users to make the use of the client code mandatory and even specify the format of the client code using a boolean expression. The default for accounts is for the client code to be an optional field. To require a client code, set the **Require Client Code** flag to **Yes**. This will make the use of a client code mandatory in any format upon login. To require the client code in a specific format, set the **Require Client Code** flag to **Yes** and use the following grammar to set the **Client Code Format**."

A	alphabetic character, A-Z or a-z
N	numeric digit, 0-9
	space character
.	period character

Below the table, there are two radio button options: "Show Receipts?" with "Yes" selected and "Require Client Code?" with "Yes" selected. The "Yes" radio button for "Require Client Code?" is highlighted with a red box. Below these are two text input fields: "Client Code Format" and "Client Code Text". The "Client Code Format" field is highlighted with a red box. At the bottom of the form, there are three buttons: "Submit", "Reset", and "Cancel". The "Submit" button is highlighted with a red box.