# Welcome to NextGen

GAMB Public User Training July 29, 2021

www.gamb.uscourts.gov/USCourts/migrationcmecf-nextgen

# **Roadmap for Today's Training**

#### Tasks that should be complete

- Familiarize yourself with what NextGen is
- Create or upgrade a PACER account
- Know your current CM/ECF login and password

#### Tasks and Instructions for August 9, 2021 and after

- How to link your CM/ECF and PACER account
- Different Ways to login to CM/ECF
- How to register for a new E-filing account
- How to Link a New Filing Agent Account to an Attorney Account
- How to File as a Filing Agent; and
- How to request changes to your account-address, phone number, etc.

- NextGen is the shortened name for Next Generation of CM/ECF
- NextGen is a filing system fully integrated with PACER. The two systems are linked by a module called Central Sign-On
- NextGen provides modules that integrate with existing CM/ECF functionality

# What is NextGen?

# Why are we migrating to NextGen?

### The goals of NextGen are to:

- Promote better integration among the district, bankruptcy, and appellate systems
- Enhance security measures to protect CM/ECF data
- Greater user efficiency using new tools and technology
- Centralized access to all courts for filers and court users

# When are we doing this?



CHANGES ALREADY OCCURRING IN THE BACKGROUND TO PREPARE FOR NEXTGEN MIGRATION GO LIVE DATE: AUGUST 9, 2021



FRIDAY, AUGUST 6, 2021, AT NOON, CM/ECF WILL GO DOWN AND REMAIN OFFLINE ALL WEEKEND

# **Terms to Know**

**NEXTGEN:** Next Generation of the Judiciary's case management electronic filing (CM/ECF) system

**PSC:** PACER Service Center

**CSO:** Central Sign On - NextGen functionality that allows both external filers and court users to have one login and password to access any NextGen court

**PAA:** PACER Administrative Account - A consolidated billing and online account management process for groups. All PACER charges associated with each individual PACER account can be linked to the PAA

FILING AGENT: External users who can file pleadings on behalf of an attorney or trustee

# What to do Now to Get Ready?

- Get your own PACER account (this applies to all existing attorneys, trustees, limited filers and filing agents)
  - Each external filer must have their own individual PACER account
    - More information on how to set up an individual PACER account can be found here: <u>https://pacer.uscourts.gov/register-account</u>
  - > NO Shared PACER accounts for a firm will be useable
  - Firms may set up a PACER Administrative Account for billing purposes
    - More information on how to set up a PACER administrative account can be found here:

https://pacer.uscourts.gov/register-account/group-billing

If you already have your own PACER account: (attorneys, trustees, limited filers and filing agents)

- Upgrade a PACER Account
  - > Is your PACER account upgraded?
    - If your PACER account was created *after* August 11, 2014, your account is already an upgraded account nothing further to do right now
    - If your PACER account was created *prior* to August 11, 2014, you will need to upgrade your account now, if you haven't already done so
      - More information about upgrading your PACER account can be found here: <u>www.gamb.uscourts.gov/USCourts/migrationcmecf-nextgen</u>

Do you want to prevent receiving a bill for each attorney with their own PACER account?

- The PACER Service Center has developed the PACER Administrative Account (PAA), a consolidated billing and online account management process for groups
- The PAA can only be used for administrative purposes and does not provide the ability to file documents
- All charges associated with each individual PACER account can be linked to the PAA
- To register for a PAA, one person in the firm should be appointed the Administrator and would complete the registration on the PACER website: <u>https://pacer.uscourts.gov/register-account/group-billing</u>

# PACER Administrative Accounts

# What is a Filing Agent?

- A filing agent may be an individual employed by a registered attorney or trustee.
- Filing agent accounts allow staff to file cases, pleadings and other documents on behalf of an attorney or trustee
- A filing agent can be assigned to file on behalf of multiple attorneys and trustees.
- An attorney or trustee may have multiple filing agents.



# **Facts About Filing Agents**

Filing agents can docket on behalf of an attorney or trustee The filing agent name will not appear in the pick list for docketing (only the attorney or trustee name will show)

Filing agents can work in CM/ECF at the same time as the attorney or trustee

The filing agent name will not appear in docket text (the docket text will show the attorney's name or trustee as the filer) The filing agent will have the same filing rights and privileges assigned to the attorney or trustee's account

# Know your password

Know your current CM/ECF username and password

- If the login information is stored in a browser, it will be lost and not recoverable once the court migrates to NextGen.
- Contact the ECF Helpdesk prior to August 2<sup>nd</sup> by sending an email to the <u>ecf\_helpdesk@gamb.uscourts.gov</u> to obtain your login information or reset your password.
- After we go live, you can take advantage of our password reset feature.

# August 9<sup>th</sup> and After

How To...

- > On or After August 9, 2021:
  - Link your PACER account to your CM/ECF account.
  - ✓ Log into CM/ECF
  - Submit new e-file registrations in NextGen
  - Link a filing agent account to attorney account
  - Request changes to your CM/ECF account
  - ✓ Update email addresses in CM/ECF
  - File for multiple attorneys or trustees as a filing agent

# How to Link your CM/ECF Account to your PACER Account:

Before you can begin to E-file, you must link your CM/ECF Account to your PACER Account:

- Go to the Court's homepage and click on E-filing (CM/ECF)
- 2. Click on Middle District of Georgia - Document Filing System



# How to Link your CM/ECF Account to your PACER Account:

- 3. You will be prompted to enter your PACER Username and Password
- 4. Click on Utilities > NextGen Release 1.1 Menu Items

Password *			
Client Code			
	rin (	Clear	

This is a restricted government website for official PACER use only. All activities of PACER subscribers or users of this system for any purpose, and all access attempts, may be recorded and monitored by persons authorized by the federal judiciary for improper use, protection of system security, performance of maintenance and for appropriate management by the judiciary of its systems. By subscribing to PACER, users expressly consent to system monitoring and to official access to data reviewed and created by them on the system. If evidence of unlawful activity is discovered, including unauthorized access attempts, it may be reported to law enforcement officials.

Your Account <u>Change Your Client Code</u> <u>Review Billing History</u> <u>View PACER Account Information</u>	Miscellaneous <u>eFinCert</u> <u>Mailings</u>	<u>Release 5.0 Menu Items</u> <u>NextGen Release 1.1 Menu Item</u>

### How to Link your CM/ECF Account to your PACER Account:

- 5. Click on "Link a CM/ECF account to my PACER Account"
- 6. Type in your CURRENT CM/ECF login and your CURRENT CM/ECF password. Click Submit.





5.

Link a CM/ECF account to my PACER account

k a CMECF account to my PACER account
s utility links your PACER account with your or filer account in this court.
ou une CM/ECF for PACER only, no action is mecennary.
u had a CMECF e-filing account in this court before the court converted to NextOea CMECF, enter your old CMECF login and password below and press Submit. You will be prompted to confirm that you want to link your PACER and to your old CMECF e-filing account. Press Submit to link the accounts (or go back if the ments dust match). EECF login: LECF password: LECF password:

### How to Link your CM/ECF Account to your PACER Account:

- The PACER and CM/ECF account user will appear on the screen. If the accounts should be linked, click Submit.
- 8. The next screen will reflect that your accounts have been successfully linked. You can begin to file in CM/ECF NextGen.



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# How to Login to NextGen CM/ECF:

Three ways to login to CM/ECF to E-file:

- 1. Go to the Court's website and click E-Filing (CM/ECF)
- 2. Go to PACER > Filing Electronically > Court CM/ECF Lookup >
- 3. Go to PACER > Manage Your Account > Manage My Account Login > Log in to Manage My Account > Maintenance > Display Registered Courts > Georgia Middle Bankruptcy Court





# New E-Filing Registrations

On or After August 9, 2021, to request new E-filing privileges:

- Log into your individual PACER account or, if you do not have an individual PACER account, create an individual PACER account.
- Once logged into PACER, go to Manage Your Account > Maintenance
- Click on Attorney Admissions/E-File Registration or Non-Attorney E-File Registration



## New Attorney E-Filing Registration

- If Registering for Attorney Admissions/E-File Registration
  - Select Court Type = U.S. Bankruptcy Courts
  - Select Court = Georgia Middle Bankruptcy Court



## New Attorney E-Filing Registration

- Select E-File Registration Only
- By Registering to E-File, you acknowledge you have reviewed the following:
  - ► CM/ECF Administrative Procedures
  - Online training videos
  - Local Rules and General Orders

#### What would you like to apply/register for?



## New Attorney E-Filing Registration

- Enter the primary email to receive Notices of Electronic Filing (NEF)
- Select Email Frequency
  - Once Per Day (Daily Summary)
  - ▶ At The Time of Filing (One Email per Filing)
- Select Email Format
  - ► HTML
  - Text
- Click Next

Delivery Method and F	ormatting	
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Email Format*	HTML	
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Once you have submitted the registration, it will be reviewed by the ECF Helpdesk staff. If there are any questions regarding the registration, you will receive an email requesting additional information. All approved registrations will receive a confirmation email regarding approved access to the Court's CM/ECF Filing System.

# New Non-Attorney E-Filing Registration

# If registering for Non-Attorney E-File Registration

- Select Court Type = Bankruptcy Court
- Select Court = Georgia Middle Bankruptcy Court
- Select Role in Court
  - Creditor
  - Filing Agent
- Click the box to acknowledge you are submitting the registration for the individual listed above.

#### **Complete all sections of E-File Registration**

#### Filer Information

Please note that not all courts accept non-attorney filers and some accept only specific types of non-attorney filers. If the selected court does not allow a specific type of non-attorney filer, you will not be able to register for filing privileges at that court.

#### \* Required Information

one.\*

Court Type *	U.S. Bankruptcy Courts		
Court *	Georgia Middle Bankruptcy Cou	$\mathbf{v}$	

Before continuing, view the local Policies and Procedures on Electronic Filing for the selected					
	court				
	http://www.gamb.uscourts.gov/USCourts/attorneys				
Role in Court	Filing Agent				
Name	Dot Com				
I acknowledge that I am submitting the e-file registration for the individual listed above. Note: If more than one individual uses this account, you must create a new PACER account for the individual who needs e-filing privileges, if she or he does not already have					

# New Non-Attorney E-Filing Registration

- Complete the remaining prompts for the registration
  - You will be prompted for email delivery method and formatting. It is required you complete this information but as a filing agent or creditor you will not receive Notices of Electronic Filing (NEFs).

Delivery Method and	Formatting			
Use a different email fields belo	email. Checking this will clear the p w.	rimary		
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Confirm Email *	test@gmail.com	8		
Email Frequency *	Once Per Day (Daily Summa 🗸			
Email Format *	HTML			
	Next Reset	Cancel		
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should add the filing agent's email as a secondary email to their CM/ECF account.

Once you have submitted the registration, it will be reviewed by the ECF Helpdesk staff. If there are any questions regarding the registration, you will receive an email requesting additional information. All approved registrations will receive a confirmation email regarding approved access to the Court's CM/ECF Filing System.

# For All New Registrations

 As part of the Registration Process for both Attorney and Non-Attorney E-Filers, you will be asked to add billing information. Completion of this information is optional.

#### **Payment Information**

**NOTE:** Not all courts accept ACH payments. If the court to which you are making a payment does not accept ACH, then ACH payments will not be available as an option during payment. In addition, the PACER Service Center does not accept ACH payments for PACER (case search) fees.

This section is optional. If you do not enter payment information here, you may do so later by selecting the **Make One-Time PACER Fee Payment** option under the **Payments** tab.

Select your method of payment from the **Add Credit Card** and **Add ACH Payment** options below. You may store up to three payment methods.

To designate a card as the default for e-filling or admissions fees, click the **Set default** link in the box(es) below. To remove the card as a default, click the **Turn off** link.



### How to Link a New Filing Agent Account to an Attorney Account

Attorneys or trustees seeking to link a filing agent account to their attorney/trustee account on or after August 9, 2021, will need to log into CM/ECF via PACER and complete the following steps:

- Go to Utilities > Maintain Your ECF Account > More User Information
- 2. Enter the filing agent last name into the field next to Find a filing agent
- 3. Click on the magnifying glass



### How to Link a New Filing Agent Account to an Attorney Account

- 4. Locate the filing agent name to link to attorney account and Click Select
- Click on the hyperlink of the name of the added filing agent to bring up the "Update Filing Agent Permissions". Make sure Internet Payment is set to Y. Then click save.
- 6. Click on Return to Account Screen
- 7. Click Submit



# How to File as a filing Agent

Filing Agents need to remember to select the correct attorney or trustee before docketing an entry. Follow these steps after logging into CM/ECF using your PACER login:

- 1. Click on the name of the attorney or trustee you are filing for.
- 2. At the top of the CM/ECF screen, you will see the name of attorney or trustee you are filing for along with a Change user link.
- 3. When you are finished filing for a certain attorney or trustee, you should be able to click the Change user link to go back to the screen for selecting a new filer.
- 4. Click the name of another attorney or trustee to file for and the CM/ECF screen will change to the different attorney or trustee. However, this feature is not always reliable. If you find you have trouble changing from one user to another, you will need to log out of CM/ECF and close the browser and clear the browser cache to docket to the correct attorney or trustee account.



### How to Request Changes to Your CM/ECF Account

► For any CM/ECF account changes, you will no longer call or email the ECF Helpdesk. Follow these instructions instead:

► Log into PACER by going to:

- PACER > Manage Your Account > Manage My Account Login > Log in to Manage My Account
- Click on Maintenance
- ▶ The options for updating your account are:
  - ▶ Update Personal Information
  - Update Address Information
  - Update E-Filer Email Noticing and Frequency



# How to Request **Changes to Your CM/ECF** Account

- For updating address information or email frequency with GAMB:
  - ✓ You must check the box by the GAMB court name and click Submit for the Court to receive the requested changes.

 The updated information will be sent to the ECF Helpdesk to accept the changes.

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Email Frequency *	Select Email Frequency	
:mail Format *	Select Email Format	
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	PACER Billing	
	<ul> <li>123 USBC Lane Macon, GA 31201 Phone: 478-749-8888</li> </ul>	
	U.S. Bankruptcy Courts	
	Georgia Middle Bankruptcy Court (test) 123 USBC Lane Macon, GA, 31201 Phone: 478-749-8888	
	Submit Reset	Cancel

# How to Update Secondary Emails

For any Secondary Email changes to your CM/ECF account, you may make these changes by following these instructions:

- Log into CM/ECF
- Go to Utilities > Maintain Your ECF Account > Email Information
- Once updates have been made, click Return to Account Screen

Click Submit

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address	Secondary
Secondary Reenter	
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E to the secondary addresses	
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Send notices in these additional cases	
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Send a notice for each filing	
• Send a Daily Summary Report	
You can also update frequency and	
Format notices I HTML format of your Nations boro	
• Text	
Return to Account screen Clear	

# Resources

 GAMB website: <u>www.gamb.uscourts.gov/USCourts</u> /migration-cmecf-nextgen



NextGen Info » Case Locator (PACER) » E-Filing (CM/ECF) » Electronic Proof of Claim » Electronic Financial Management Certificate »

#### Important Information Regarding Court Operations During COVID-19 Outbreak

COVID-19 Entrance/Mask Requirements at all Court facilities: COVID-19 entrance requirements for this Court are governed by Administrative Order 141, amended May 18, 2021. The Order requires unvaccinated persons to wear masks in public spaces within our facilities and all persons are subject to the health based entrance criteria. See Amended Administrative Order 141 on our website for further details on building entrance and mask requirements.

The Court continues to operate PRIMARILY VIA TELEPHONIC HEARINGS in accordance with Administrative Orders #137 and #138, which can be found in our News and Announcements tab below and our Administrative Orders tab or on the "Important Information Regarding Court Operations During COVID-19 Outbreak" link above. In-person hearings must be specially set.

PRIOR TO ATTENDING AN IN-PERSON HEARING, please contact the appropriate courtroom deputy if you are unsure whether your hearing is a telephonic hearing or not. Visitors who wish to appear in person to file papers, pleadings, or other documents may do so at our Macon and Columbus locations, but visitors who do come to the court will be required to wear a mask and to conform with COVID-19 protocols prior to entering our facilities. You are still encouraged to contact the Clerk's Office at 478-752-3506 in Macon or 706-649-7837 in Columbus prior to traveling to our court facilities to determine if we can assist you over the phone and to provide you additional means of filing documents.

# Resources

> Register for an individual PACER Account if you do not have an individual account:

https://pacer.uscourts.gov/register-account

How to Upgrade PACER Account if you already have a PACER account but it was created prior to August 11, 2014: <u>https://pacer.uscourts.gov/help/pacer/upgrading-your-pacer-account</u>

> Register for a PAA Account – centralized billing for groups:

https://pacer.uscourts.gov/register-account/group-billing

# **Questions?**



Please use the "Q & A" feature to submit your questions.



Helpdesk at gamb\_nextgen@gamb.uscourts.gov.