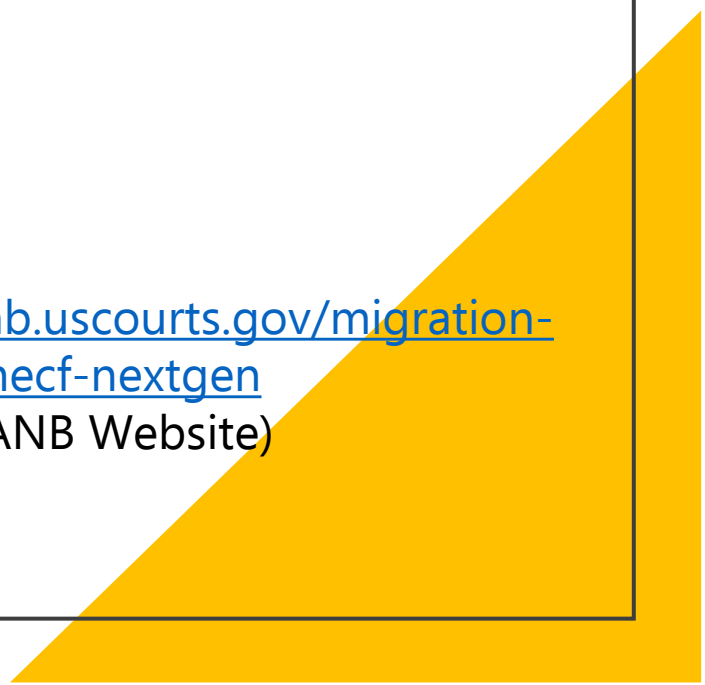


Welcome to NextGen

The Final Countdown

GANB Public User Training
Session Three
July 16, 2021

<https://www.ganb.uscourts.gov/migration-cmecf-nextgen>
(GANB Website)

A large yellow triangle is positioned in the bottom right corner of the slide, pointing towards the top right.

Roadmap for Today's Training

- Tasks that should be complete
 - Familiarize yourself with what NextGen is
 - Create or upgrade a PACER account
 - If necessary, register for a Filing Agent account
 - Know your current CM/ECF login
- What to do on and after August 9, 2021 (Go Live Date)
 - Link your CM/ECF and PACER account
 - Review CM/ECF Administrative Procedures
 - How to register for a new E-filing account (Attorney, Filing Agent, Creditor)
 - How to request changes to your account—address, phone number, etc.

What is NextGen?

- 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

When are we doing this?



Changes already occurring in the background to prepare for NextGen migration



Friday, August 6, 2021 at 5:00 pm, CM/ECF will go down and remain offline all weekend



Go Live Date: August 9, 2021

Terms to Know

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

CSO: NextGen functionality that allows both external filers and court users to have one login and password to access any NextGen court

PSC: PACER Service Center

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.

Create a PACER Account

Get your own PACER account

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

Upgrade a PACER Account

If you already have your own PACER account:

➤ Is your PACER account upgraded?

- If your PACER account was created *on or 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:

https://www.ganb.uscourts.gov/sites/default/files/upgrade_pacer_account_learning_aid.pdf




Filing Agents

What is a Filing Agent?

An external filer authorized to file new cases, pleadings, and other documents on behalf of an attorney or trustee

Who Can Be a Filing Agent?

An individual employed by a registered attorney or trustee may be a filing agent



Filing Agents

What to do Now to Get Ready

First, get your own PACER account

- Each filing agent must have their own individual PACER account
 - ✓ More information on how to set up an individual PACER account can be found here:
<https://pacer.uscourts.gov/register-account>
- NO Shared PACER accounts for a firm will be useable
- A filing agent account can be linked to a firm's PACER Administrative Account (PAA) for ease of billing

Filing Agents

What to do Now to Get Ready

Second, submit a Filing Agent Registration Form to the court

- The Filing Agent Registration Form may be found on the court's website here:
https://www.ganb.uscourts.gov/sites/default/files/filing_agent_registration_form.pdf

- ✓ Signed by both the attorney and the filing agent

- ✓ Email completed form to:
registration@ganb.uscourts.gov

NO LATER THAN 5:00 pm on July 23, 2021

- The CM/ECF filing agent username and password will be emailed to you on
August 6, 2021

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 July 30, 2021) by sending an email to the ecf_helpdesk@ganb.uscourts.gov to obtain your login information or reset your password

August 9th and After How To...

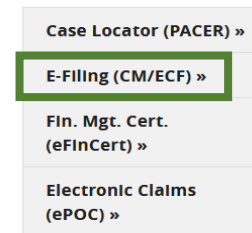
On August 9 and After, How To:

- Link your CM/ECF account to your PACER account so you can E-File
- 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:

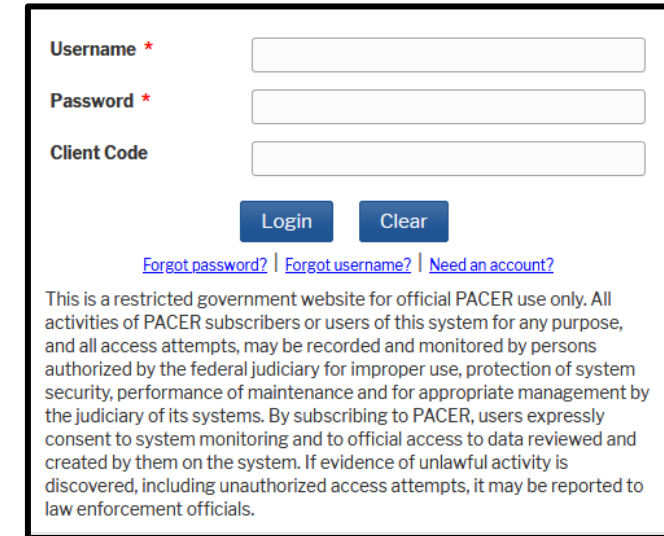
Before you can begin to E-File, you must link your CM/ECF Account to your PACER Account:

1. Go to the Court's homepage and click on E-Filing (CM/ECF)
2. Click on Live - 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



Username *

Password *

Client Code

Login Clear

[Forgot password?](#) | [Forgot username?](#) | [Need an account?](#)

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.



Utilities

Your Account <ul style="list-style-type: none">Change Your Client CodeReview Billing HistoryView PACER Account Information	Miscellaneous <ul style="list-style-type: none">eFinCertMailings...	Release 5.0 Menu Items NextGen Release 1.1 Menu Items
---	---	--

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

5. Click on Link a CM/ECF account to my PACER account

5.

NextGen Release 1.1 Menu Items

[Change PACER Exemption Status](#)

[Link a CM/ECF account to my PACER account](#)

[Maintain Your Login/Password](#)

6. Type in your current CM/ECF login and your CM/ECF password. Click Submit.

6.

Link a CM/ECF account to my PACER account

This utility links your PACER account with your e-filer account in this court.

If you use CM/ECF for PACER only, no action is necessary.

If you had a CM/ECF e-filing account in this court before the court converted to NextGen CM/ECF, enter your old CM/ECF login and password below and press Submit. You will be prompted to confirm that you want to link your PACER account to your old CM/ECF e-filing account. Press Submit to link the accounts (or go back if the names don't match).

CM/ECF login:

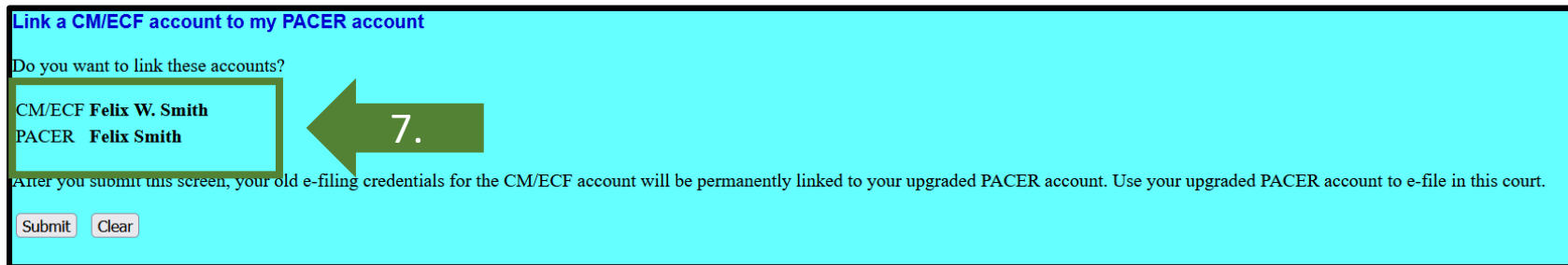
CM/ECF password:

Submit

Clear

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

7. The PACER and CM/ECF account user will appear on the screen. If the accounts should be linked, click Submit.



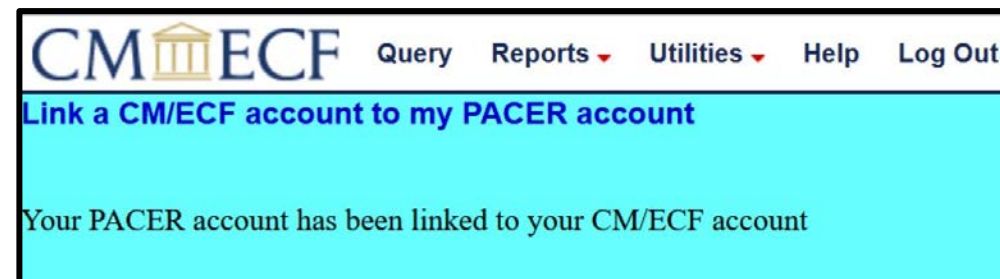
Link a CM/ECF account to my PACER account

Do you want to link these accounts?

CM/ECF Felix W. Smith
PACER Felix Smith

After you submit this screen, your old e-filing credentials for the CM/ECF account will be permanently linked to your upgraded PACER account. Use your upgraded PACER account to e-file in this court.

8. The next screen will reflect that your accounts have been successfully linked. You can begin to file in CM/ECF NextGen.



CM/ECF Query Reports Utilities Help Log Out

Link a CM/ECF account to my PACER account

Your PACER account has been linked to your CM/ECF account

How to Login to 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 > Georgia Northern Bankruptcy Court > Login to CM/ECF
3. Go to PACER > Manage Your Account > Manage My Account Login > Log in to Manage My Account > Maintenance > Display Registered Courts > Georgia Northern Bankruptcy Court

Case Locator (PACER) »

E-Filing (CM/ECF) »



Fin. Mgt. Cert. (eFinCert) »

Electronic Claims (ePOC) »

What can we help you accomplish?



Search for a Case

Learn options to find case information.



Filing Electronically

Find court specific information to help you file a case electronically and developer resources.



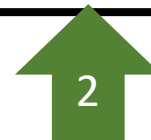
Manage Your Account

Create a PACER account or log in to manage your account and pay a bill.



Move to NextGen CM/ECF

Is your court migrating to NextGen CM/ECF? Follow these steps to prepare in advance.



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

What can we help you accomplish?



Search for a Case

Learn options to find case information.



Filing Electronically

Find court specific information to help you file a case electronically and developer resources.



Manage Your Account

Create a PACER account or log in to manage your account and pay a bill.



Move to NextGen CM/ECF

Is your court migrating to NextGen CM/ECF? Follow these steps to prepare in advance.

Account Number 7043988
Username attyld13
Account Balance \$0.00
Case Search Status Active
Account Type Upgraded PACER Account

Settings

Maintenance

Payments

Usage

[Update Personal Information](#)

[Update Address Information](#)

[E-File Registration/Maintenance History](#)

[Attorney Admissions / E-File Registration](#)

[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 Northern Bankruptcy Court

In what court do you want to practice?

* Required Information

Court Type *

U.S. Bankruptcy Courts



Court *

Georgia Northern Bankruptcy Court



Note: Centralized attorney admissions and e-file registration are currently not available for all courts. If you do not see a court listed, please visit that court's website. To find more information on all courts, visit the [Court CM/ECF Lookup page](#).

Next

Reset

Cancel

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?

E-File Registration Only

Pro Hac Vice

Federal Attorney

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
- Complete the remaining prompts for the registration

Delivery Method and Formatting

☐ Use a different email. Checking this will clear the primary email fields below.

Primary Email * ?

Confirm Email * ?

Email Frequency * ▼

Email Format * ▼

Next

Back

Reset

Cancel

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 Northern Bankruptcy Court
- ✓ Select Role in Court
 - Creditor
 - Filing Agent



Account Number	7044020
Username	TestUser789
Account Balance	\$0.00
Case Search Status	Inactive
Account Type	Upgraded PACER Account



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**

Court Type *  

Court *  

[Before continuing, view the local Policies and Procedures on Electronic Filing for the selected court](#)

Role in Court * 

Name

☐ I acknowledge that the information provided above is true and correct. **Note: If you are registering for the individual listed on this account, you must create a new PACER account for the individual, if she or he does not already have one. ***

Please verify your address with your CSO account.

☐ I am registering for the individual listed on this account, and I am not the same person as the individual listed on the account. If you are registering for a different address from the one provided for

Creditor

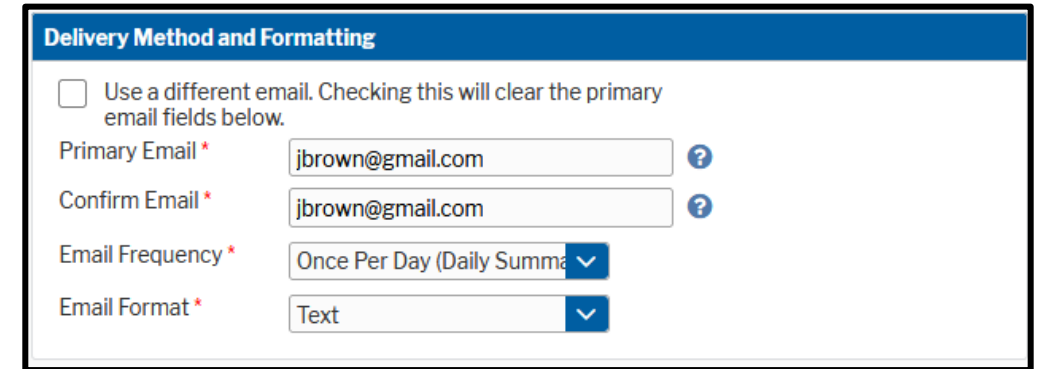
Filing Agent

Trustee


US Trustee

New Non-Attorney E-Filing Registration

- By Registering to E-File, you will acknowledge you have reviewed the following:
 - ✓ CM/ECF Administrative Procedures
 - ✓ Online training videos
 - ✓ Local Rules and General Orders
- 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).



The screenshot shows a web form titled "Delivery Method and Formatting". It includes a checkbox for "Use a different email. Checking this will clear the primary email fields below." Below this are four fields: "Primary Email" and "Confirm Email" both containing "jbrown@gmail.com", "Email Frequency" set to "Once Per Day (Daily Summary)", and "Email Format" set to "Text". Each field has a small blue question mark icon to its right.



Although the registration process requires this information, creditors and filing agents will not receive Notices of Electronic Filing. If a creditor wants to receive electronic notice, they can sign up for Electronic Bankruptcy Noticing (EBN) via BNC (<https://bankruptcynotices.uscourts.gov/>). If a filing agent would like electronic noticing, the attorney or trustee they file for 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.

E-filing fees default can be selected to pay all Court filing fees. If this box is not checked, you will be prompted to enter filing fee information for each transaction.


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-filing 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.


☒ Autobill PACER fees
☒ E-filing fees default
☐ Admissions fees default

XXXXXXXXXXXX4747
01/2038

TestUser
123 Tester St.
Atlanta, GA
30303

Update

[Add Credit Card](#)
[Add ACH Payment](#)

Next **Back** **Cancel**

How to Link a Filing Agent Account to an Attorney Account

Attorneys seeking to link a filing agent account to their attorney account will need to log into CM/ECF via PACER and complete the following steps:

1. 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

Maintain User Account

Last name	Attyld	First name	
Middle name		Generation	
Title		Type aty	
Office			
Address 1	75 Spring Street, SW		
Address 2	Room 1340		
Address 3			
City	Atlanta	State	GA
Country		County	
Phone		Fax	
Alternate Phone		Text Phone	
Bar ID		Bar status	
Initials		DOB	
Person end date		Mail group	
		AO code	

[Email information...](#) [More user information...](#) [Submit](#) [Clear](#)

1.

More User Information for Attyld

[Update Account](#) [Information](#)

Last login 07-13-2021 10:35

Login attyld13 **Current login** 07-13-2021 10:36

Person ID 1442592 **Create date** 06/26/2012

Person Authorization ID 65 **Update date** 07/12/2021

Public User ID 7043988 **User end date**

Judiciary User ID

E-Filing Status Active

Internet Payment N

Groups Attorney

Filing agents

Find filing agent Agent

[Return to Account screen](#) [Clear](#)

2. 3.

How to Link a Filing Agent Account to an Attorney Account

4. Locate the filing agent name to link to attorney account and Click Select
5. Click on Return to Account screen
6. Click Submit

Add a Filing Agent

Name	Address
Agent, Fiona Filing	Law Office 123 Maple Street Atlanta, GA 30303 404-555-1111

4.

More User Information for AttyId

[Update Account Information](#) Last login 07-13-2021 10:35

Login attyId13 Current login 07-13-2021 10:36
Person ID 1442592 Create date 06/26/2012
Person Authorization ID 65 Update date 07/12/2021
Public User ID 7043988 User end date

Judiciary User ID
E-Filing Status Active
Internet Payment N
Groups Attorney

Filing agents
Uncheck the box to remove a filing agent.
☒ Agent, Fiona Filing [Law Office, 123 Maple Street, Atlanta, GA 30303, 404-555-1111, Account ID: 7043243]

Find filing agent Agent

Return to Account screen Clear

5.

Maintain User Account

[Edit my name and address information](#)

Last name AttyId First name
Middle name Generation
Title Type aty
Office
Address 1 75 Spring Street, SW
Address 2 Room 1340
Address 3
City Atlanta State GA Zip 30303
Country County
Phone Fax
Alternate Phone Text Phone
Bar ID Bar status
Initials DOB Mail group
Person end date AO code

Submit Clear

6.

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, click Change user link to go back to 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

Filing for

Attyld (aty)
Denny X. Crane (aty)
Paul Lewiston (aty)
Mark Litterbox (aty)
Alan Shore (aty)
Felix W. Smith (aty)

1. Click on the name of the attorney or trustee you are filing for

CM/ECF

Bankruptcy ▾

Adversary ▾

Query

Reports

Filing for Felix W. Smith (aty)



Change user

2. Use the toggle at the top of CM/ECF screen to see the attorney or trustee name you are filing for and to change to a different attorney or trustee

Filing for

Attyld (aty)
Denny X. Crane (aty)
Paul Lewiston (aty)
Mark Litterbox (aty)
Alan Shore (aty)
Felix W. Smith (aty)

3. To change attorney or trustee you will be taken back to this screen

CM/ECF

Bankruptcy ▾

Adversary ▾

Query

Reports

Filing for Mark Litterbox (aty)



Change user

4. CM/ECF screen now shows the attorney or trustee you switched to file for

How to Request Changes to Your CM/ECF Account

For any CM/ECF account changes, you will no longer 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

What can we help you accomplish?

 Search for a Case Learn options to find case information.	 Filing Electronically Find court specific information to help you file a case electronically and developer resources.	 Manage Your Account Create a PACER account or log in to manage your account and pay a bill.	 Move to NextGen CM/ECF Is your court migrating to NextGen CM/ECF? Follow these steps to prepare in advance.
--	--	--	--

Manage My Account Login

Login to manage your account details, like updating your address and email and payment information. If the federal court you're doing business with uses NextGen CM/ECF, you can also apply for attorney admissions or register to file electronically.

[Log in to Manage My Account](#)

Account Number	7043988
Username	attylid13
Account Balance	\$0.00
Case Search Status	Active
Account Type	Upgraded PACER Account

Settings Maintenance Payments Usage

[Update Personal Information](#)
[Update Address Information](#)
[Update E-Filer Email Noticing and Frequency](#)
[Display Registered Courts](#)

[Attorney Admissions / E-File Registration](#)
[Non-Attorney E-File Registration](#)
[Check E-File Status](#)
[E-File Registration/Maintenance History](#)

How to Request Changes to Your CM/ECF Account

- ✓ For updating address information or email frequency with GANB:
 - You must check the box by the GANB 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

Apply Updates to Selected Courts

U.S. Bankruptcy Courts

Georgia Northern Bankruptcy Court (test)

☒ Click to apply changes to this court

Add your e-filer email noticing and frequency preferences for this court below

Email Laurie_Davis@ganb.uscourts.gov

Email Frequency At The Time of Filing (One Email per Filing)

Email Format HTML

Additional email addresses for district and bankruptcy e-filers must be added through the CM/ECF Maintain Your Account utility.

* Required Information

Primary Email * ?

Confirm Email * ?

Email Frequency * ▼

Email Format * ▼

Apply Updates to Selected Courts

PACER Billing

☐ Testing Address
Atlanta, GA 30303
Phone: 800-555-1222

U.S. Bankruptcy Courts

Georgia Northern Bankruptcy Court (test)

☒ 75 Spring Street, SW
Room 1340
Atlanta, GA 30303

Phone:

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

Email information for Attyld

Primary email address Laurie_Davis@ganb.uscourts.gov [Update my primary email address](#)

Secondary email address Reenter secondary email address

☒ Enable confirmation of Free Look Use to verify your **one free look** will be used when a document link is clicked from CM/ECF emails (NEFs).

Send the notices specified below

☒ to my primary email address

☒ to the secondary addresses

☒ Send notices in cases in which I am involved

☐ Send notices in these additional cases

☒ Send notices for adversary proceedings in which I am directly involved and for their related bankruptcy cases

☐ Send notices for adversary proceedings in which I am directly involved but not for their related bankruptcy cases

You may receive notices for some bankruptcy cases if it is required by the Clerk of Court.

☐ Send a notice for each filing

☒ Send a Daily Summary Report

Format notices ☒ HTML

☐ Text

Both these boxes must be checked to receive notices at both primary and secondary addresses

You can also update frequency and format of your Notices here

Add Secondary Email Address(es) in the two boxes provided to the left



Questions?



If you have questions after this presentation, please visit our website, or email our ECF Helpdesk at ecf_helpdesk@ganb.uscourts.gov



Please use the “raise hand” feature and the host will unmute you.