

Administrative Office of the U.S. Courts
Department of Program Services / Case Management Systems Office

CM/ECF

Release Notes

for PACER Users

Bankruptcy NextGen Release 1.1
Revision 1.1.2

October, 2016

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CONTENTS

1	Introduction	1
2	Central Sign-On	2
2.1	<i>Public User Registration (PSC)</i>	2
2.1.1	Public User Path (PACER only)	3
2.1.2	Attorney Path	3
2.1.3	Non-Attorney Path	3
2.2	<i>Linking a PACER Account to a CM/ECF Account</i>	4
2.3	<i>Deactivation Requests</i>	5
3	Reports	6
4	Utilities	7
4.1	<i>Maintain Your ECF Account</i>	7
4.2	<i>Link a CM/ECF Account to my PACER Account</i>	7
4.3	<i>Change My Role</i>	8
5	PACER Billing Changes	9
5.1	<i>Exempt Public Users</i>	9
6	Fee Payments	10
6.1	<i>PACER Service Center Payment Screens</i>	10
6.2	<i>Requiring fee payment to complete a filing</i>	10
7	Corrections:	11
7.1	<i>Menu changes</i>	11
8	Public Access Changes	12
8.1	<i>All PACER Users</i>	12
8.1.1	Upgraded PACER Accounts	12
8.1.2	Overview of Upgraded Account Registration Process	12
8.2	<i>Attorney Users</i>	14
8.2.1	Overview of Account Registration Process	14
8.2.2	PSC Registration Wizard	15
8.2.3	CM/ECF Menu	18

1 Introduction

This document summarizes the changes you may notice when you use NextGen CM/ECF in a U. S. Bankruptcy Court that has installed Release 1.1 of the application. Because certain features are court configurable, courts may choose not to implement all of them. Thus, what you see in particular courts may vary.

2 Central Sign-On

The central sign-on (CSO) process allows all CM/ECF users to maintain one account across all courts and to sign in one time to access multiple courts. Each judiciary user, attorney, pro se filer, court reporter, other filer, or member of the public is identified with the appropriate level of security in each court in which they are allowed to file or view documents.

Public users, including attorneys, trustees, court reporters, filing agents, and other individuals, register for a CSO account via the PACER Service Center (PSC). This is also known as an “upgraded” PACER account, to distinguish it from a legacy PACER account. It provides PACER access to all courts (as long as the user's account is in good standing). A CSO account may also provide public users with e-filing privileges in NextGen CM/ECF courts. Once registered, public users can make updates to their personal data through the PSC.

Registration requests are transmitted to the courts, where they are processed by court staff.

2.1 Public User Registration (PSC)

CSO registration at the PSC has three paths, depending on how the user wants to interact with the courts:

- Public User: for PACER (read-only) access
- Attorney: for PACER access, plus the ability to file electronically
- Non-Attorney Filer: for PACER access, plus the ability to file electronically

2.1.1 Public User Path (PACER only)

New users who only wish to view court records will follow the Public User path which establishes a PACER account; the user must provide billing information, and accept the PACER usage terms and conditions. Users who provide a credit card will have immediate PACER access; users who do not provide a credit card during registration will receive a mailed document with an access code and instructions so that they can activate their account.

2.1.2 Attorney Path

Attorneys who wish to have filing privileges in a federal court will follow the Attorney path. This path requires the attorney to:

- a. establish an upgraded PACER account, using the same process as PACER-only users;
- b. complete the e-filing registration,
- c. provide optional payment information, and
- d. accept the e-filing terms and conditions (if applicable).

Depending on the court selected, the user may see different registration options, links to the court's policies and procedures, and any court-specific instructions.

Note that attorneys who already have filing accounts in CM/ECF can link their upgraded PACER account to their existing CM/ECF account via the utility "[Link a CM/ECF account to my PACER account](#)".

2.1.3 Non-Attorney Path

New users who are not attorneys and who want to file or perform filing-related activities will go through the Non-Attorney Filer path. The Non-Attorney Filer path requires the user to:

- a. establish an upgraded PACER account,
- b. complete the e-filing registration,
- c. provide optional payment information, and
- d. accept e-filing terms and conditions.

Note that non-attorney users who already have filing accounts in CM/ECF can link their upgraded PACER account to their existing CM/ECF account via the utility "[Link a CM/ECF account to my PACER account](#)".

2.2 Linking a PACER Account to a CM/ECF Account

If you want to create a link to a CM/ECF account, you select “Link a CM/ECF Account to My PACER Account” (the location of this option may vary from court to court).

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:

[Forgot login/password](#)
[More about Upgraded PACER account](#)

You enter your CM/ECF credentials and respond to this message:

Link a CM/ECF account to my PACER account

Do you want to link these accounts?

CM/ECF John Marshall
PACER Ted Marshall

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.

When you click *Submit*, you see a message like “Your PACER account has been linked to your CM/ECF account.” The upgraded PACER account is now linked to that legacy CM/ECF account; this is your “primary” or default account. Whenever you access the court’s site, you are given the privileges of that account.

The next time you log in, selecting the “Link a CM/ECF account...” menu option displays this message:

Link a CM/ECF account to my PACER account

**Your PACER account is already linked to your CM/ECF account.
If you need a separate filing account, contact the court.**

So if you have more than one e-filing account to be linked (such as for roles as trustee and attorney), you must contact the court, which will do the linking. After your multiple accounts have been linked, and you go to that court site, you will be able to change from the default account to one of the linked accounts, via the [Change My Role](#) utility, which is only available if you have multiple roles.

2.3 Deactivation Requests

If your account is erroneously set to an active e-filer status, you can notify the court to change this status by clicking the “Request Deactivation” option on the maintenance tab within PSC account management.

MANAGE MY ACCOUNT

Welcome, Sara Darvall

Logout

Account Number	4014050
Username	saradarvall22
Account Balance	\$0.00
Case Search Status	Active
Account Type	Upgraded PACER Account

Check E-File Status		
Court Type ▲	Court ⇅	Status
U.S. Appellate Courts	U.S. Court Of Appeals, Oca-Td Installation - NextGen	Active
U.S. Appellate Courts	U.S. Court Of Appeals, Oca-Td Test - NextGen	Check
U.S. Appellate Courts	AO Cm8a Court Of Appeals - NextGen	Active Request Deactivation
U.S. Bankruptcy Courts	Cmso Bankruptcy Court (cm3b Test) - NextGen	Check
U.S. District Courts	AO Cm3d District Court - NextGen	Check

Cancel

The court will need to review and approve this change before it will be final.

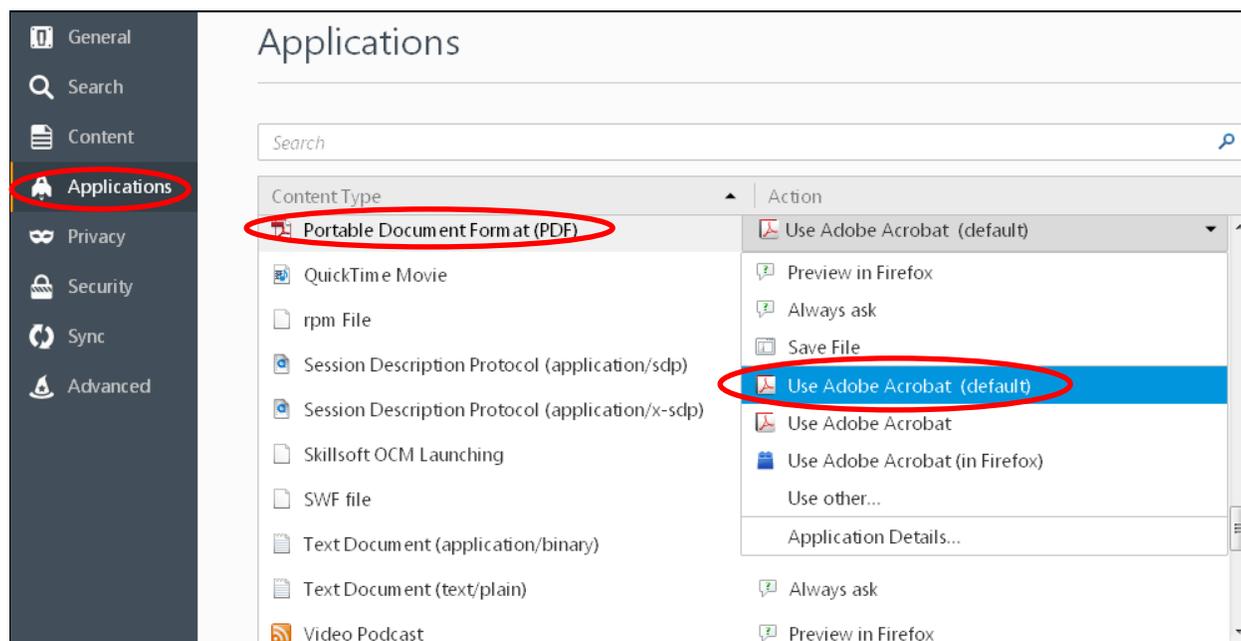
3 Reports

When using the Docket Report to create an appendix, you may be presented with a blank screen after clicking the “View Document” button. This rare occurrence has only been seen when the Firefox browser is used, “Include PDF documents” is checked, and two or more documents are selected. It has been attributed to an error in Firefox.

This situation can be corrected (or avoided) if you switch to another browser, or use the Adobe Reader plug-in rather than the built-in PDF Viewer.

To set Firefox to use Adobe Reader:

- Open the “Options” screen (from either the Tools menu, or the menu icon  on the toolbar)
- Select the Applications pane; scroll down to Portable Document Format (PDF); select “Use Adobe Acrobat (default)” from the dropdown list, rather than “Use Adobe Acrobat (in Firefox)”:



4 Utilities

4.1 Maintain Your ECF Account

The screen now displays as read-only information. New fields for Alternate Phone and Text Phone have been added. An “Edit my name and address information” link opens a new browser tab/window with the “Manage My Account” component at the PSC website, where you can submit to the court any changes to name or primary address. [You can still enter/edit a secondary email address via the “Email information” screen but it is only saved locally.]

Note: Changes you make are subject to review by court staff before becoming effective in the court.

On the “More User Information” screen, username is now read-only since you must change your username at the PACER Service Center (PSC). An “Update Account Information” link takes the user to the PSC for maintenance of his PACER account.

More User Information for John Marshall Jr	
Update Account Information	Last login 11-30-2015 16:39
Login johnmarshall	Current login 12-01-2015 15:46
Person ID 349987	Create date 06/25/2014
Person Authorization ID 335228	Update date 07/20/2015
Public User ID 4014122	User end date
Judiciary User ID	
E-Filing Status Active	
Internet Payment Y	
Groups Attorney	

A password text box is provided to allow you to change the password for your legacy CM/ECF account; the legacy login/password must be entered for you to link your updated PACER account to your existing CM/ECF account.

Additional read-only items, such as Public User ID and E-Filing Status, are shown; the “Registered” item has been removed. Filing agent information no longer includes login since agents must have their own accounts.

Note: a filing agent who was registered in legacy CM/ECF must upgrade his PACER account to be able to file in NextGen. If he does not, the attorney/trustee for whom he files will see a message for the agent in the “Filing agents” block:

Filing agents
<p>Uncheck the box to remove a filing agent.</p> <p><input checked="" type="checkbox"/> McCampbell, Montgomery Maynard [Michele's Filing Agent Test Account, 500 W Rolling Hills Road, Bldg 5, Mooresville, NC 28115, Account ID: Needs an upgraded PACER account]</p>

The attorney/trustee should direct the agent to the PACER site to obtain an account.

A public user who has successfully linked his PACER account to a CM/ECF account will have a menu option for the “Maintain Your Login/Password” utility. This option redirects the user to the PSC site.

4.2 Link a CM/ECF Account to my PACER Account

This utility is described in the Central Sign-On chapter, [Linking a PACER Account to a CM/ECF Account](#)

4.3 Change My Role

You can have your PACER account linked to multiple CM/ECF accounts (such as for two roles as trustee and attorney), as described in [Linking a PACER Account to a CM/ECF Account](#). One role is always the default role, which you automatically assume when you go to the court site.

If you need to be in a different role, you must use the Change My Role utility [which is only available for users with multiple roles].

There is a column for each role (CM/ECF account) you have. By clicking the “Permanent Default Account” radio button for a different role, you change the default. Clicking the radio button for a “Session Default Account” changes your role only for the duration of the current session.

Select Default Account		
	Franz Joseph Liszt (aty)	Abraham Lincoln (pty)
Permanent Default Account	<input checked="" type="radio"/>	<input type="radio"/>
Session Default Account	<input checked="" type="radio"/>	<input type="radio"/>
Email	keatsburg+liszt@gmail.com	
Role	Attorney	Party
Office	Law Office of Colonial Williamsburg	
Address1	1000 Mainstreet	5500 Main Avenue
Address2	Building 9	Apartment 120
City	Dallas	Centertown
State	VA	TX
Zip	88777	44855
Primary Phone	555-555-1277	555-555-1144
<input type="button" value="Save"/> <input type="button" value="Clear"/> <input type="button" value="Cancel"/>		

5 PACER Billing Changes

5.1 Exempt Public Users

In the legacy system, some PACER users could have one account that incurred PACER fees and another that was used in circumstances when they were exempt from these fees. In NextGen, each user has only one PACER account which has a default status of exempt or not exempt; for those users needing both billing options, a mechanism for changing and displaying the exemption status is provided.

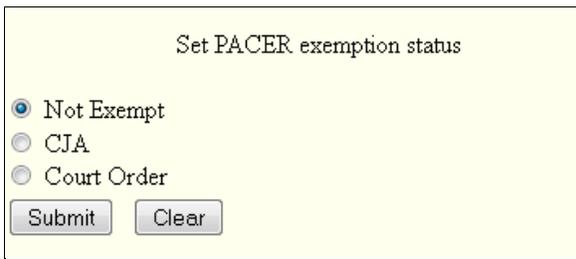
For these users, an indicator of exemption status appears in bold red text on the selection criteria page for billable reports and queries. When the exemption is in effect, the words **PACER fee: Exempt** appear; otherwise, the text reads: **PACER fee: Not exempt**.

A “Change” link appears next to the status:



PACER fee: not exempt [Change](#)

Clicking the link takes you to the utility (also available on the Utilities menu) to select the opposite status (along with the reason for exemption):



Set PACER exemption status

Not Exempt
 CJA
 Court Order

You are responsible for setting the status appropriately. When you log out from PACER, the default exemption status again applies.

Exemption status is determined for each court, so you may need to change that status when accessing a different court's CM/ECF.

PACER receipts and billing transactions include the status.

6 Fee Payments

6.1 PACER Service Center Payment Screens

In the legacy CM/ECF application, you were redirected to the Pay.gov website whenever a fee payment was required; you had to enter credit card information each time a payment was made.

In NextGen CM/ECF, the PACER Service Center (PSC) collects credit card information when you register. When you click a *Pay Now* button in CM/ECF, you are redirected to the PSC (rather than to pay.gov), which displays the payment screens. You can make the payment with stored payment information (credit card, or direct debit if the court allows), or can enter it as before. The PSC transmits the transaction data to Pay.gov.

NOTE: payment receipt numbers, which you see in the Pay.gov payment confirmation email, now include a letter prefix which reflects the number of attempts made to pay via the Internet; if the first attempt was successful, the receipt number has an “A” prefix; “B” indicates that the first attempt failed but the second was successful, and “C” for the third attempt (only 3 attempts are allowed).

6.2 Requiring fee payment to complete a filing

In the legacy CM/ECF application, you had the option of deferring a fee payment; unpaid charges were displayed any time you filed thereafter, and the court could prevent filing until payment was made.

A court may continue to allow this. However, NextGen provides a mechanism for a court to require the payment of fees before the final case opening confirmation. If the court requires up-front payment, you will see these messages before you are redirected to PSC’s payment screen:

Now loading the payment processing screen. This process might take a few seconds.

To ensure that you are charged correctly, do not use the browser's Back button until this transaction is complete.

If you click the *Cancel* button on one of the PSC payment screens, you see a message: “The payment process was incomplete; you must start over.” The entire filing (or case opening) is cancelled.

7 Corrections:

PACER Billing	The Docket Activity Report now bills correctly when a user runs a report and requests full docket text
Claims Upload	The value provided with the userName tag is now validated against the name of the filer in their CM/ECF account (users.name).
Case Opening	New case opening validations have been added: <ul style="list-style-type: none"> • For a chapter 12 case, the Nature of debt must be "business". • For a chapter 13 case, the Type of debtor must be "Individual". • The Type of debtor can only be "Individual" for chapter 7, 11, 12 or 13 cases. • If the Type of debtor is "Corporation", "Partnership", or "Other", the Nature of debt must be "business"; furthermore, these settings apply only to chapter 7, 9, 11, or 12 cases.
Case Upload	Previously, submitting a file including the correct number of fields resulted in an error indicating that the field number was incorrect. Now a file with the correct number of fields is accepted without error.

7.1 Menu changes

The following new menu items have been added:

- Change PACER Exemption Status
- Link a CM/ECF account to my PACER account

Because of the new CSO logins, the items below are no longer used and are removed from the Utilities menu by the installation process.

Deleted Menu Item
Change Your PACER Account
Change Your Password
CM/ECF Login
Clear Default PACER Login

8 Public Access Changes

8.1 All PACER Users

8.1.1 Upgraded PACER Accounts

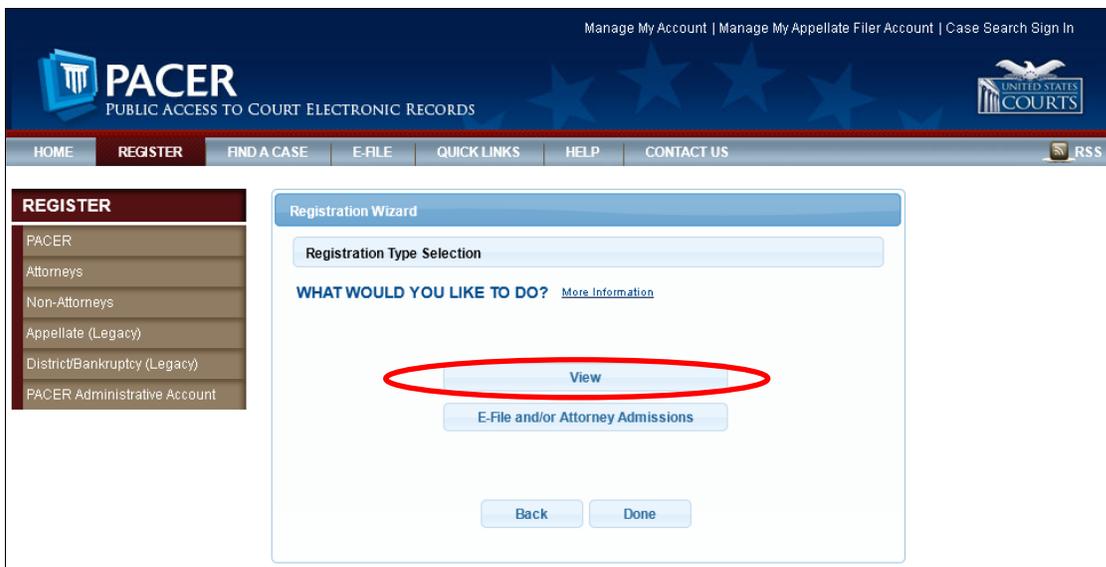
The PACER Service Center (PSC) website (<http://www.pacer.gov>) provides centralized registration, technical support, and billing services for access to documents and case information in CM/ECF. The PSC website has been updated to provide increased security features. If you change any of your account information, you will be prompted to create new security questions, and a new user name and password.

8.1.2 Overview of Upgraded Account Registration Process

To create a PACER account for read-only access to public documents and case information, click the **Register** tab, then **PACER** in the Register list on the left side of the page.



Click the **Start** button.



Click the **View** button.

Manage My Account | Manage My Appellate Filer Account | Case Search Sign In

PACER
PUBLIC ACCESS TO COURT ELECTRONIC RECORDS

UNITED STATES COURTS

HOME REGISTER FIND A CASE E-FILE QUICK LINKS HELP CONTACT US RSS

REGISTER

- PACER
- Attorneys
- Non-Attorneys
- Appellate (Legacy)
- District/Bankruptcy (Legacy)
- PACER Administrative Account

PACER - CASE SEARCH ONLY REGISTRATION

Account Information

*** Required Information**

Prefix

First Name *

Middle Name

Last Name *

Generation

Suffix

Date of Birth *

Firm/Office

Unit/Department

Address *

Room/Suite

City *

State *

Zip/Postal Code *

Country *

Primary Phone *

Alternate Phone

Text Phone

Fax Number

Provide the requested data.

8.2 Attorney Users

The PACER Service Center (PSC) website provides centralized registration, technical support, and billing services for access to documents and case information in CM/ECF. A user's existing CM/ECF and/or PACER accounts are being replaced with a single user ID and password that is valid in all NextGen courts where the user has read or read/file permissions.

- If you had filing account in a court which is now implementing the NextGen version of CM/ECF, you can link that account to your PACER account; thereafter, you only need to log in to PACER and do not have to log in to the court to file.
- If you did not have a filing account but need one in a NextGen court, you will request filing privileges via PACER; you must make a separate request for each such court. If the court accepts your request, you thereafter only need to log in to PACER to file.

The PSC website has been updated to provide increased security features. If you change any of your account information, you will be prompted to create new security questions and a new user name and password.

Prior to all courts moving to NextGen CM/ECF, you will need to use your current filing credentials (login and password) to file in courts that are still using the legacy CM/ECF software, and your PACER credentials for accessing documents and case information.

The Federal Judiciary will implement a nationwide centralized attorney admissions and e-filing registration process in all appellate, bankruptcy, and district courts over the next several years. Release 1 of Bankruptcy NextGen CM/ECF automates and centralizes the process by which attorneys can request public access, and access to courts for filing.

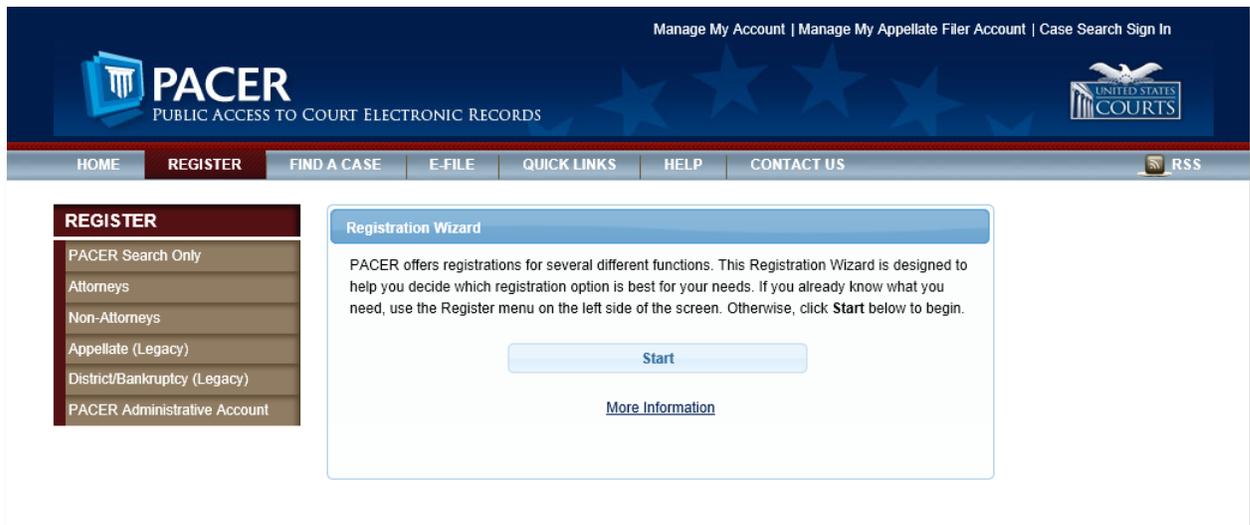
8.2.1 Overview of Account Registration Process

- 1. Determine whether the court uses the legacy or the NextGen CM/ECF system.**
If the court in which you want to practice has upgraded to NextGen CM/ECF, you can register to e-file through the PSC site. If the court uses a legacy system, you will need to contact the court to register. Check the "Court Links" page; NextGen courts are labeled: [Alaska - NextGen](#)
- 2. Submit e-file registration.**
If you have an upgraded PACER account, go to "Manage My Account"; select the **Attorney Admissions/E-File Registration** option. E-file registration requirements vary from court to court, but the information you update through Manage My Account is sent electronically to each court in which you are registered.
- 3. Apply for e-file registration in each court individually.**
Once you complete a registration in one court, you may register to e-file in another court. The same username and password will allow nationwide search access and e-file access in the NextGen CM/ECF courts in which you are registered as an e-filer. When your request is complete, the PACER Service Center will send it to the court for verification and processing. Document filing and access to restricted cases/documents in a court is not permitted until that court processes the registration request.
- 4. Wait for a reply from the court indicating whether the registration has been accepted.**
Processing time for e-file registration can vary from court to court. Once your request is processed, you will receive an email notification of the court's determination. For additional information regarding e-filing procedures, click on the relevant court on the [Geographic Boundaries map](#). Contact the Clerk's Office if immediate access to file documents is needed.

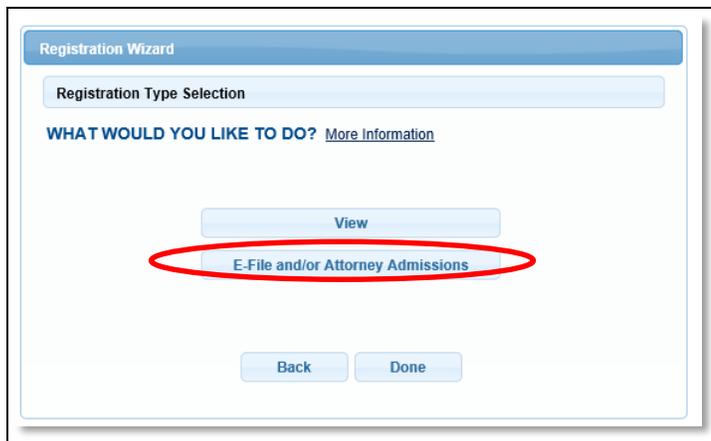
8.2.2 PSC Registration Wizard

You can use the PSC Registration Wizard to guide you through the process of setting up an account and requesting access to e-file in one or more court.

1. Click the **Register** tab, then click **Start** in the Registration Wizard.



2. Click **E-File and/or Attorney Admissions** [note that registration for Attorney Admissions is not available for Bankruptcy courts in this release.]



3. Select the court for which you want an account

Registration Wizard

E-File Registration

IN WHICH COURT WOULD YOU LIKE TO E-FILE?

*** Required Information**

Court Type *

Court *

Next

Back **Done**

For additional assistance, contact the PACER Service Center at (800) 676-6856 between the hours of 8 AM and 6 PM CT Monday through Friday or by email at pacer@psc.uscourts.gov

4. Determine which scenario best describes you and click the corresponding button.

Registration Wizard

NextGen CM/ECF E-File Registration

U.S. Court of Appeals, OCA-TD Test uses a new Next Generation Case Management/Electronic Case Files (NextGen CM/ECF) system. While the **legacy** system required multiple logins, the **upgraded** NextGen CM/ECF system allows you to access court information and perform different procedures (e.g., e-filing) using only one login. Select the option below that best describes you. Roll over a button for more information about the selection.

I have an upgraded PACER account

I do NOT have an upgraded PACER account

I do not have an account

Back **Done**

For additional assistance, contact the PACER Service Center at (800) 676-6856 between the hours of 8 AM and 6 PM CT Monday through Friday or by email at pacer@psc.uscourts.gov

5. Depending on your selection in Step 4, above, you will see some or all of the following screens.

ATTORNEY ADMISSIONS AND/OR E-FILE REGISTRATION

User Information

Generate Username

Check Username

Username *

Password *

Confirm Password *

Security Question 1 *

Select a Question

Security Answer 1 *

Security Question 2 *

Select a Question

Security Answer 2 *

Next

Back

Reset

Cancel

ATTORNEY ADMISSIONS AND/OR E-FILE REGISTRATION

Payment Information

There is no registration fee. However, the Judicial Conference of the United States has established a fee for access to information in PACER. All registered users will be charged as follows:

- Use of web-based PACER systems will generate a \$.10 per page charge.
- Audio files of court hearings retrieved via PACER will generate a \$2.40 per file charge.

Providing a credit card is optional. If you would like to register without providing a credit card, click **Next** below without entering any information on this screen. For instant access to PACER, we will validate the credit card information you provide here. There is no registration charge; however, the credit card will be charged quarterly for any fees incurred. If you submit your registration request without providing credit card information, you will receive an activation code by U.S. mail in 7-10 business days.

**** Credit card data is optional here. However, if you do provide a credit card, the marked fields below are required.**



Account Holder Name *

Card Type *

Select Card Type

Account Number *

Card Expiration Date *

01 / 2014
 Use saved address

Address *

City *

State *

Select State

Zip/Postal Code *

Country *

United States of America

I authorize the PACER Service Center to charge the above credit card once a quarter for PACER usage above the quarterly fee waived threshold, which is currently set at \$15 and subject to change. *

Note: We protect the security of your information during transmission using Secure Sockets Layer (SSL) software, which encrypts information you submit.

Next

Back

Reset

Cancel

ATTORNEY ADMISSIONS AND/OR E-FILE REGISTRATION

CLICK CONTINUE TO COMPLETE THE ATTORNEY ADMISSIONS AND/OR E-FILE REGISTRATION.

Your Central Sign-On account has been created. Now you may apply for attorney admissions and/or register to e-file by clicking the **Continue** button below. You may also apply for attorney admissions and/or register to e-file at any time through the **Manage My Account** link located in the upper right corner of the PACER Service Center website.

MANAGE MY ACCOUNT

Welcome, Jane Marshall

Account Number	4014229	Important News
Username	janemarshall	
Account Balance	\$0.00	

IN WHAT COURT DO YOU WANT TO PRACTICE?

* Required Information

Court Type *

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. For a listing of all court websites visit the [Court Links Page](#).

8.2.3 CM/ECF Menu

The new CM/ECF logo and menu bar display at the top of all pages. The CM/ECF logo is a link to the Court Information Summary. The list of authorized menu items display on the right-hand side; a red arrow next to a menu item indicates that a menu item has a submenu.

