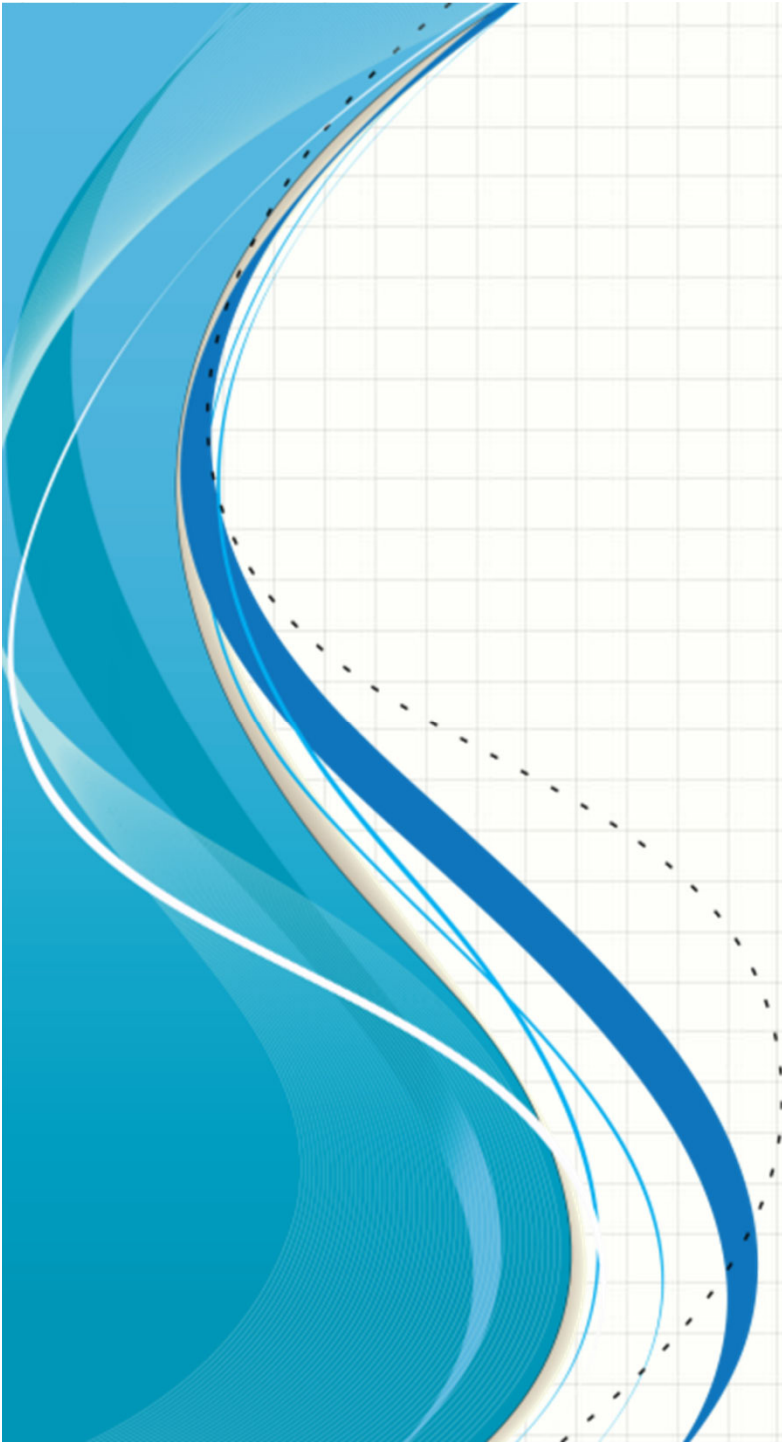




# **WELCOME TO NEXTGEN**

A joint presentation from the  
following US Bankruptcy Courts

Middle District of Florida  
Northern District of Florida  
Southern District of Florida

## RESOURCES

Each district has website resources and links that specify what actions to take, both *before* and *after* each court's GO LIVE date.

**FLMB:** <http://www.flmb.uscourts.gov/nextgen/>

**FLNB:** <https://www.flnb.uscourts.gov/nextgen-information-hub>

**FLSB:** [www.flsb.uscourts.gov](http://www.flsb.uscourts.gov)

**Before GO LIVE: Upgrading PACER accounts:**  
*(described within this presentation)*

- <https://pacer.uscourts.gov/help/faqs/my-pacer-account-not-upgraded-how-do-i-upgrade-my-account>

**After GO LIVE: Linking PACER accounts to “LIVE” NextGen:**  
*(described within this presentation)*

- <https://pacer.uscourts.gov/help/faqs/how-do-i-link-my-cmecf-electronic-filing-credentials-my-upgraded-pacer-account>



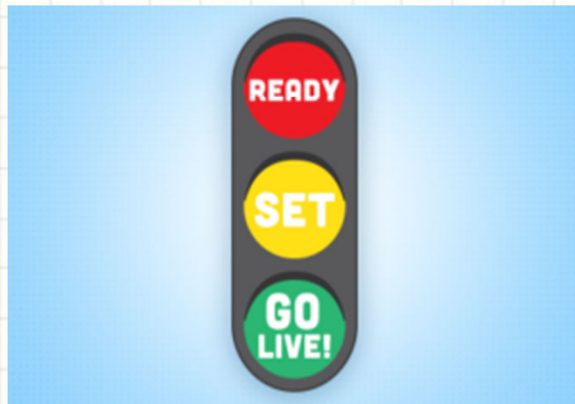
## WHAT IS NEXTGEN?

- NextGen is an abbreviation of CM/ECF “Next Generation”.
  - NextGen fully integrates with PACER. The two systems are linked by Central Sign-On (CSO), a process that simplifies e-filing, paying fees, and user account maintenance.
  - Central Sign-On defined: Integration of Appellate, District and Bankruptcy Court systems.
  - The e-filing interface of FLMB/FLNB/FLSB are the same for each district and local e-filing protocols are largely unchanged. Filing Agents, parties e-filing on behalf of others, will notice new enhancements.
- 

## BENEFITS OF CENTRAL SIGN-ON INTEGRATION

- Centralization – A singular login code is used to access all federal courts. NOTE: Attorneys who are also trustees will have a login for each type of access.
- Security measures that protect user data, including stored credit card(s) are more robust.
- The system can grow and take advantage of new tools and technologies.
- E-filing protocols for e-filers is largely unchanged. However, some account maintenance functions within the CM/ECF Utility tab will launch the user into PACER automatically. This is new feature as PACER and NextGen work together.

## WHAT IS EACH COURT'S GO LIVE DATE?



**FLMB: November 22, 2021**

**FLNB: December 6, 2021**

**FLSB: First Quarter 2022  
(Date TBA)**

*Stay tuned for broadcast  
messages sent to all e-filers.*

# IMPORTANT TERMS TO KNOW

1

- **PSC: PACER SERVICE CENTER.** Provides entry to each court, parties have greater control of their own account maintenance and stored credit card data, and accounts travel with the user. NOTE: E-filers may need a unique login for each “physical” location.

2

- **Filing Agent:** A party who e-files on behalf of another, such as a paralegal. Filing Agents must have their own individual account, can be associated with any attorney or trustee, and may store payment data.

3

- **PAA: PACER Administrative Accounts.** This is an optional consolidated billing and account management process for groups (e.g., attorneys within a large firm). PACER charges for individual accounts are linked to one centralized PAA.

## FILING AGENTS: DETAILS, DETAILS, DETAILS

- This type of account enables “mirror access”, which means he/she will have the same filing privileges as the linked attorney/trustee account.
- The docket text reflects ONLY the attorney or trustee’s name as the filer.
- A Filing Agent sees a visual confirmation of the attorney/trustee name on their screen. If linked to more than one, a **Change** button (next to the attorney/trustee name) enables the Filing Agent to quickly switch to a different attorney/trustee.
- **A Filing Agent MUST register for their own individual account.**  
<https://pacer.uscourts.gov/register-account/non-attorney-filers-cmecf>. *Register in PACER as a “Non-Attorney” Filer.* An attorney or trustee may have multiple Filing Agents.

## FILING AGENTS: DETAILS, DETAILS, DETAILS

- Payment data can be stored in a Filing Agent's PACER account, but it is not required. *If a fee-based document is filed by a Filing Agent, the fee incurred is due from the linked attorney but can also be paid for by the Filing Agent IF fees are enabled by the attorney/trustee.*
- Filing Agents can e-file in a case *at the same time* as the attorney or trustee. Sharing one account is not recommended. *All Filing Agent activity is visible by the attorney/trustee by selecting Utilities > View Your Transaction Log.*
- Filing Agents receive attorney/trustee NEF notifications only if add as a secondary email recipient. Add recipients via CM/ECF from the Utilities tab (process has *not* changed in NextGen).

## PAA: PACER ADMINISTRATIVE ACCOUNTS

- PAA is a record keeping function for PACER charges incurred by multiple users that are linked to a PAA.
  - *Note: It does not include any CM/ECF (court) filing fees.*
- The clerk's office does not have access to any firm's PAA nor can the clerk's office resolve billing questions. Inquiries must be directed to PACER.
- To register or learn more about PAA, visit:  
<https://pacer.uscourts.gov/register-account/group-billing>.
- PACER Service Center (PSC) contact information:  
(800) 676-6856, [pacer@psc.uscourts.gov](mailto:pacer@psc.uscourts.gov)

## WHAT TO DO NOW!

- **UPGRADE YOUR EXISTING PACER ACCOUNT.** If you have an attorney AND trustee account, upgrade both. It's easy – it takes just a few clicks. Click here for instructions:  
<https://pacer.uscourts.gov/help/faqs/my-pacer-account-not-upgraded-how-do-i-upgrade-my-account>
  - You *may* need to upgrade if your PACER account was created *prior to August 11, 2014*. If you already e-file in any NextGen court, no action is needed as you already have an upgraded account.
  - **You MUST upgrade if you see the following “Upgrade” hyperlink located at PACER > Manage My Account.**

|                    |                                                  |
|--------------------|--------------------------------------------------|
| Account Number     | 7008336                                          |
| Username           | TR8336                                           |
| Account Balance    | \$0.00                                           |
| Case Search Status | Active                                           |
| Account Type       | Legacy PACER Account ( <a href="#">Upgrade</a> ) |



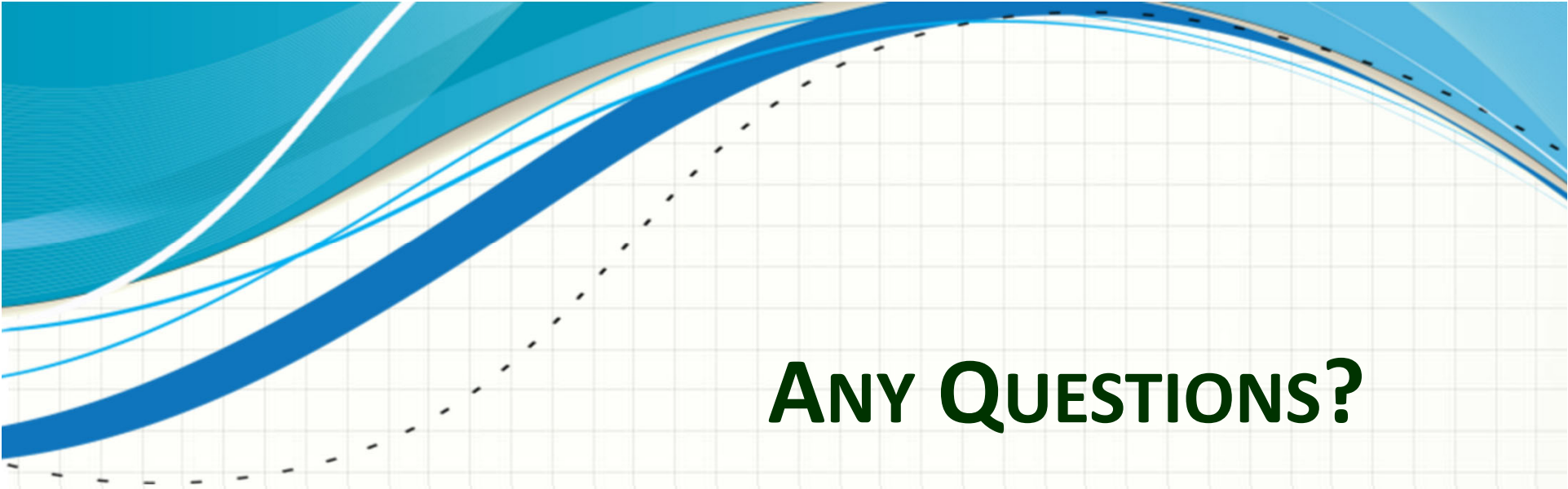
- Register for your own PACER account, if needed.  
<https://pacer.uscourts.gov/help/faqs/how-does-attorney-become-authorized-electronic-filer>

## WHAT TO DO AFTER YOUR COURT'S "GO LIVE" DATE!

- **LINK YOUR ACCOUNT.** Before e-filing your first document on or after the court's GO LIVE date, link your upgraded PACER account to NextGen:
  - Click Utilities > NextGen Release 1.1 Menu Items > "Link a CM/ECF account to my PACER account".
- **Know your current CM/ECF Login and Password.**
  - Obtain this information now for later use. **You need it before the court's GO LIVE date to link your PACER account to NextGen.**
  - Contact the clerk's office if assistance is needed to reset your login and password.
- Keep in mind the following. 1. Some users have their login and password stored in a web browser. 2. Alternate programs may be affected by old saved passwords. 3. Know that existing CM/ECF links will no longer work after the court's GO LIVE date; *courts will update website links prior to releasing NextGen to the public.*

## BROWSERS

- NextGen works with the following browsers.
  - Firefox
  - Chrome
  - Edge
  - Safari
    - Note: Safari is supported but the latest versions of NextGen v1.6 have not been fully vetted at the national level due to constraints imposed by the COVID-19 pandemic.
  - Using Internet Explorer is discouraged. Microsoft is retiring support for this product.
- Remember.... Know your CM/ECF login and password, particularly if it is stored in a web browser or program. Your login and password is required to link your PACER account to NextGen before e-filing your first document on or after the GO LIVE date.



# ANY QUESTIONS?

## COURT CONTACTS

|             |                                                                                                                                                                                                                                                                                                         |
|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>FLMB</b> | SARA MASON, CM/ECF HELP DESK COORDINATOR<br>(813) 301-5079, <a href="mailto:SARA_MASON@FLMB.USCOURTS.GOV">SARA_MASON@FLMB.USCOURTS.GOV</a><br>GULL WEAVER, DEPUTY IN CHARGE<br>(904) 301-6500, <a href="mailto:WGULL@FLMB.USCOURTS.GOV">WGULL@FLMB.USCOURTS.GOV</a>                                     |
| <b>FLNB</b> | TAMMI BOSWELL, DIRECTOR OF COURT OPERATIONS<br>(850) 521-5011, <a href="mailto:TAMMI_BOSWELL@FLNB.USCOURTS.GOV">TAMMI_BOSWELL@FLNB.USCOURTS.GOV</a><br>JULIE GIBSON, DATA QUALITY ANALYST/TRAINER<br>(850) 521-5014, <a href="mailto:JULIE_GIBSON@FLNB.USCOURTS.GOV">JULIE_GIBSON@FLNB.USCOURTS.GOV</a> |
| <b>FLSB</b> | CAMERON CRADIC, DEPUTY IN CHARGE<br>(561) 514-4107, <a href="mailto:CAMERON_CRADIC@FLSB.USCOURTS.GOV">CAMERON_CRADIC@FLSB.USCOURTS.GOV</a>                                                                                                                                                              |