

NEXTGEN CM/ECF Reference Guide

United States District Court *for the* **Middle District of Alabama**

https://www.almd.uscourts.gov

Contents

Electronic Filing (E-Filing) Registration for Admitted Attorneys	3
Register for a New PACER Account	8
Upgrade Your Current PACER Account	11
NextGen Procedures for CJA Panel Members	15
Using exempt status prior to May 3, 2021 in the Alabama Middle District	15
Using exempt status after May 3, 2021 in the Alabama Middle District	16
Link Your PACER & NextGen CM/ECF Accounts	18
Maintaining Your Account	21

Electronic Filing (E-Filing) Registration for Admitted Attorneys

The U.S. District Court for the Middle District of Alabama (ALMD) will have transitioned to NextGen CM/ECF as of May 3, 2021. To request electronic filing (e-filing) access on or after this date, you *must have* an upgraded individual PACER account *and* be admitted to practice in the ALMD. If you do not have an individual PACER account, click <u>this link</u> for instructions on creating an account. If your PACER account is not an updated account, click on <u>this link</u> for instructions on how to upgrade.

Once you have a PACER account, follow the steps below to request filing access. If you are not admitted to practice in the U.S. District Court for the Middle District of Alabama, then your request will be rejected.

1. Open your web browser and navigate to <u>pacer.uscourts.gov</u>. Click on "**Manage Your Account**" from the Quick Access blocks. Select "manage my account login" and then "log in to manage my account."



What can we help you accomplish?

2. Enter your **PACER Username** and **PACER Password**.

Enter your PACER credentials to update personal information, register to e-file, make an online payment, or to perform other account maintenance functions.

Require	ed Information
Userna	me *
Passwo	ord *
Nee	Login Clear Cancel ed an Account? Forgot Your Password? Forgot Username?
NOTICE:	This is a restricted government website for official PACER use only Unauthorized entry is prohibited and subject to prosecution under Title 18 of the U.S. Code. All activities and access attempts are logged.

3. Select the Maintenance tab.



4. Select Attorney Admissions/E-File Registration.



5. From the **Court Type** list, select *U.S. District Courts*. From the **Court** list, select *Alabama Middle District - NextGen*. Click **Next**.

Court Type *	U.S. District Courts
Court *	

6. On the **"What would you like to apply/register for?**" screen, click the *E-file Registration Only* option.



7. Scroll down to the middle section and complete all parts of the **Additional Filer Information**. Below that, you must also complete the **Delivery Method and Formatting** section of the form. This is used for electronic notification. Email address information comes from your existing PACER information. *Failure to provide this information may result in delay or rejection of e-filing privileges*.

Already Admitted a	ALABAMA MIDDLE DISTRICT
Court Bar ID	0000
)ther Names Used	Other Name
Nost Recent Case in court where you	CR-00-00-00
are registering)	
State Bar ID	0000
State Bar ID State Delivery Method an	Alabama
State Delivery Method an	d Formatting email. Checking this will clear the primary
State Delivery Method an Use a different	d Formatting email. Checking this will clear the primary
State Delivery Method an Use a different email fields be	d Formatting email. Checking this will clear the primary ow.
State Delivery Method an Use a different email fields be Primary Email *	Alabama

8. Click <u>Add Credit Card</u> to enter payment information. Providing a credit card is *optional*. If you would like to register without providing a credit card, then simply click **Next** without entering any financial information on this screen.

У	ment 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.
	his section is optional. If you do not enter payment information here, you may do so later y selecting the Make One-Time PACER Fee Payment option under the Payments tab.
	elect your method of payment from the Add Credit Card and Add ACH Payment options elow. You may store up to three payment methods.
	o designate a card as the default for e-filling or admissions fees, click the Set default link in he box(es) below. To remove the card as a default, click the Turn off link.
	Add Credit Card Add ACH Payment
	Next Back Cancel

9. After clicking **Next** from the Payment Information Screen, review the Attorney **E-Filing Terms and Conditions**.



10. The Court will review your e-filing request and provide you with further instructions via email.



Register for a New PACER Account

All filers must have an individual PACER account to file in NextGen CM/ECF. Follow the steps outline below if you *do not have* a PACER account, or if you *share an account* with others at your law firm.

- 1. Open your web browser and navigate to pacer.uscourts.gov.
- 2. Click **Register for an Account** from the menu bar.



3. Select PACER - Case Search Only.

Register for an Account 🔺	Find a C
PACER - Case Search Only	h
Attorney Filers for CM/ECF	
Non-attorney Filers for CM/ECF	Γ
Group Billing	
Register for an Account Overview	E

4. Then click the blue **Register for a PACER account** button.

Home > Register for an Account

PACER – Case Search Only

To search for federal court records online you must register for a PACER account. A PACER account will allow you to:

- Search a nationwide index of federal court records using the PACER Case Locator.
- Search for a specific case in the federal court where it's filed.

There is no fee to register. However, there is a fee to access court records once logged into PACER.

For immediate access to court records, provide a credit card during registration. If you do not provide a credit card, an activation token will be sent by U.S. mail to the address you provided on the registration form. Please allow 7-10 business days for mail delivery. For security reasons, activation tokens cannot be emailed, faxed, or given over the phone.

Visit the main PACER website (pacer.uscourts.gov) for help using PACER.

Register for a PACER account

5. Enter the required information in the registration form (designated by a red asterisk). In the **User Type** field, choose *ATTORNEY*. Click **Next**.

Email *	jcpublic@gmail.com	
Confirm Email *	jcpublic@gmail.com	
User Type *	ATTORNEY	
Check here if this account w Panel User Verification *	FEDERAL JUDICIARY STATE OR LOCAL GOVERNMENT ************************************	^
		*

6. Create a Username and Password and select **Security Questions**. Click **Next**.

Jser Information		
Required Information		
Generate Username	Check Username Available	
Username *		
Password *		
Confirm Password *		
Security Question 1 *	Select a Question	
Security Answer 1 *		
Security Question 2 *	Select a Question	
Security Answer 2 *		

7. Enter payment information if desired. Providing a credit card is *optional*. If you would like to register without providing a credit card, then simply click **Next** without entering any financial information on this screen. ****NOTE:** If you submit your registration without providing a credit card, then you will *not* be able to immediately access PACER. You will receive an activation code by U.S. mail in seven to ten (7-10) business days.

8. Read and acknowledge the Acknowledgement of Policies and Procedures.

know	ledgment of Policies and Procedures
	is no registration fee. However, the Judicial Conference of the United States has ished a fee for access to information in PACER. All registered users will be charged ows:
• /	Jse of the PACER system will generate a \$.10 per-page charge. Audio files of court hearings retrieved via PACER will generate a \$2.40 per-file charge.
	wledgment of Policies and Procedures rstand that:
s 1 1	There is a charge for accessing information in PACER. See the Fee Information section above. PACER provides electronic access to case information in U.S. federal courts. By registering for a PACER account, I assume responsibility for all fees incurred through the usage of this account. Certain accounts may be designated, under Judicial Conference policy, as exempt
ck hei	re to download a printable version of the Policies and Procedures
equire	ed Information
	$\!$
Iress	I not complete the CREDIT CARD INFORMATION, you will receive instructions at th entered on the personal information page with your activation code by US Mail in 7 days. If you have any questions, call the PACER Service Center at (800) 676-6856

9. You will receive a confirmation page when your registration is complete, unless you opted not to provide credit card information.



10. For any questions regarding **PACER registration assistance**, please contact PACER at (800) 676-6856.

Upgrade Your Current PACER Account

Individual PACER accounts ("Legacy Accounts") created prior to August 11, 2014 must be upgraded before e-filing can occur in courts that have migrated to NextGen CM/ECF. If you **do not** have your own individual PACER account (*i.e.*, you share a PACER account with other members of your firm), then refer to the <u>instructions for registering for a new</u> (<u>individual</u>) PACER account.

 Open your web browser and navigate to <u>pacer.uscourts.gov</u>. Click on "Manage Your Account" from the Quick Access blocks. Select "manage my account login" and then "log in to manage my account."



What can we help you accomplish?

2. Enter your PACER Username and Password.

	D Log	
Password * Login Clear Cancel Need an Account? Forgot Your Password? Forgot Username? NOTICE: This is a restricted government website for official PACER use only.	Require	ed Information
Login Clear Cancel Need an Account? Forgot Your Password? Forgot Username? NOTICE: This is a restricted government website for official PACER use only.	Jserna	me *
Need an Account? Forgot Your Password? Forgot Username? NOTICE: This is a restricted government website for official PACER use only.	Passwo	rd *
Need an Account? Forgot Your Password? Forgot Username? NOTICE: This is a restricted government website for official PACER use only.		Login Clear Cancel
NOTICE: This is a restricted government website for official PACER use only.	_	Login Cicar Cancer
	Nee	ed an Account? Forgot Your Password? Forgot Username?
Inauthorized entry is prohibited and subject to prosecution under	NOTICE:	
		Unauthorized entry is prohibited and subject to prosecution under
Title 18 of the U.S. Code. All activities and access attempts are logged.		

Enter your PACER credentials to update personal information, register to e-file, make an online payment, or to perform other account maintenance functions.

3. If your account type is listed as **Upgraded PACER Account**, then you already have an upgraded account, and no action is required.

7030383
Njbtesterone
\$0.00
Active
Upgraded PACER Account

4. If the account type is listed as **Legacy PACER Account** as shown below, then select the **(Upgrade)** link (highlighted in the yellow box below).

recount	Number	7003	400			
Usernan	ie	TR34	00			
Account	Balance	\$0.00)			
Case Sea	arch Status	Activ	е			
Account	Type	Lega	V PACER Aco	count (Upgrad	e)	
Settings	Maintenar	ice	Payments	Usage		
				I la dada I		lice
Change	Isername					
	Username			and the second second	PACER Billing Em	
	<u>Username</u> Password			and the second second	ER Billing Prefere	ences

- 5. On each tab (**Person | Address | Security**) enter the required information (designated by a red asterisk).
 - a. **PERSON tab:** Enter your date of birth and ensure **User Type** is set to **Attorney**. If you work for a government agency, please make the appropriate selection from the "Government" category rather than the "Attorney" category. Click **Next**.

Required Information	
refix	Select Prefix
rst Name *	John
liddle Name	Q.
ast Name *	Public
eneration	Select Generation
uffix	Select Suffix
ate of Birth *	01/01/1960
mail *	john.q.public@yourdomain.com
onfirm Email *	john.q.public@yourdomain.com
ser Type *	ATTORNEY

b. **ADDRESS tab**: Verify populated information for accuracy and select your country from the selection list. Click **Next**.

erson Address Se	ocurity
* Required Information Firm/Office	
	Law Offices of John Q. Public
Unit/Department	
Address *	123 Any Street
Room/Suite	
City *	Your Town
State *	
	New York
County *	NEW YORK
Zip/Postal Code *	10022
Country *	United States of America
Primary Phone *	555-555-3232
Alternate Phone	
Text Phone	

c. **Security tab:** Create a new Username, Password, and Security Questions (if no questions exist). Click **Submit** when finished.

Person	Address	Security
* Require	ed Informatio	n
Usernar	ne *	UserName
		Medium
Passwo	rd *	•••••
Confirm Password *		•••••
Security	Question 1 *	In what city or town was your first job?
Security	Answer1 *	Answer
Security	Question 2	In what city or town was your first job?
Security	Security Answer 2 *	Answer
		Submit Back Reset Cancel

6. Your PACER account is now upgraded. A dialog box confirms the upgrade was successful.

ername	TestUserTR3400
count Balance	\$0.00
se Search Status	Active
count Type	Upgraded PACER Account
Your personal inf upgraded PACEF	formation has been successfully changed and you now have an R account.
Close	
	Count Balance Search Status Count Type Upgrade Comp Your personal inf upgraded PACEF

7. Once your account has been upgraded, you will see the Account Type "**Upgraded PACER Account**" under "Manage My Account."

Account Number	7003400
Username	TestUserTR3400
Account Balance	\$0.00
Case Search Status	Active
Account Type	Upgraded PACER Account

8. For questions, please contact PACER at (800) 676-6856.

NextGen Procedures for CJA Panel Members

Attorneys appointed to the Criminal Justice Act (CJA) panel and their support staff are entitled to view documents and docket sheets in the cases they are appointed to without charge. If you are an existing panel attorney, the way you access the docket and receive your fee exemption will change when the court transitions to NextGen.

- Check your PACER account to be sure you have an upgraded account. Log into your PACER account at <u>pacer.uscourts.gov</u> and click on "Manage Your Account." If the Account Type says "Legacy," then consult the <u>instructions on upgrading your</u> <u>current PACER account</u>. If your account reflects "Upgraded," then proceed to requesting CJA status.
- 2. To request CJA Exempt status, call the PACER help desk at (800) 676-6856 or email pacer@psc.uscourts.gov, and request that your CJA status for the Middle District of Alabama be added to your upgraded PACER account. You **must** be able to provide PACER with the following information:
 - a. Your name, username, and the account number of your **upgraded** PACER account. You can locate this information by logging on to **"Manage my account**" at <u>pacer.uscourts.gov</u>.

Account Number	7003400
Username	TestUserTR3400
Account Balance	\$0.00
Case Search Status	Active
Account Type	Upgraded PACER

- b. The district(s) in which you have been appointed as a CJA attorney.
- c. Your PACER-exempt account information, which includes your Username and account number. You can locate this information by logging on to **"Manage my account**" at <u>pacer.uscourts.gov</u> with your PACER-exempt login.
- d. The PACER service center will send you an email with instructions on how to proceed. ****NOTE:** Once CJA privileges are activated on your upgraded PACER account, your PACER-exempt account with be canceled.

Using exempt status prior to May 3, 2021 in the Alabama Middle District.

- 1. Before the Court converts to NextGen, panel attorneys will log in as set forth below:
 - a. For **EXEMPT** access, prefix an "**x-**" in front of the PACER username.

Instructions for viewing filed documents and case information: If you do not need filing capabilities, enter your PACER login and password. If you d				
Authentication		Exempt		
Login:	x-jqpublic33		IMPORTANT NOTICE OF F	
Password:	•••••		financial account numbers; a	
client code:			including attachments.	
If you have lost or forgotten your CM/ECF password, <u>click here</u> .		I understand that, if I file,		
Login Re	set			

- b. For **NON-EXEMPT** access, enter the username without any prefix.
 - i. You can verify your **EXEMPT** status by reviewing your PACER receipt(s).

	PACER Sei	vice Cent	ter
	Transactio	on Receipt	
	01/16/201	8 16:03:57	
PACER Login:	x-nextgenuser3:1234567:0	Client Code:	
Description:	Search	Search Criteria:	Filed From: 1/1/2012 Filed To: 1/31/2012
Billable Pages:	9	Cost:	0.90

c. **NOTE: If you log on using the "x-" prefix, then all transactions in any CurrentGen courts are exempt for the duration of that session, or until you log out. The exempt status does not transfer to NextGen courts. During your session, if you access a NextGen court, you must use the "Change PACER Exemption Status" functionality to change your PACER fee status.

Using exempt status after May 3, 2021 in the Alabama Middle District.

1. Once the Alabama Middle District migrates to NextGen, all attorneys will log in for filing and viewing using PACER. For NextGen access, CJA panel attorneys will no longer use the "x-" prefix.

Di Log	gin
* Require	ed Information
Userna	me *
Passwo	rd *
	Login Clear Cancel
Nee	ed an Account? Forgot Your Password? Forgot Username?

- 2. Follow the steps below to **toggle** your exempt status.
 - a. Log in to the NextGen site using your upgraded PACER account (do not use the "x-" prefix).
 - b. When viewing documents or docket sheets in a case in which you are appointed, change your PACER exemption status. In Next Gen CM/ECF go to "Utilities" and then "Change PACER Exemption Status."



- c. On the **Change PACER Exemption Status** screen, select CJA and then click **Submit**. ****Note**: The exempt setting is good only for this session. The next time you access the system it will default to **Not Exempt**.
- d. You will see your current PACER fee status message at the bottom of al **Query** and **Report** screens. You can use the **Change** link to toggle your PACER status between exempt and non-exempt without logging out.
- e. You will also see the current PACER fee status message at the bottom of the **Query** page. The **Change** link works the same here, allowing you to toggle your PACER status without logging out.
- 3. Your support staff are entitled to an exempt PACER account. Contact PACER by phone at (800) 676-6856 or email pacer@psc.uscourts.gov and provide them with the support staff member's PACER username, the name of the CJA attorney, and indicate your CJA status with the Alabama Middle District.

Link Your PACER & NextGen CM/ECF Accounts

NOTE: This process CANNOT be completed until the Alabama Middle District has migrated to NextGen CM/ECF, which is scheduled to occur on May 3, 2021.

Once the Alabama Middle District has migrated to NextGen, your upgraded PACER account must be linked to your CM/ECF filing account. *This is a one-time procedure*. After linking your accounts, you will then use your PACER account for **all** filing and viewing access to the Alabama Middle District.

 Click on the CM/ECF link on the Alabama Middle District's website: <u>https://www.almd.uscourts.gov (https://ecf.almd.uscourts.gov/cgi-bin/login.pl)</u>.



- 2. You will be taken to the PACER login page. Log in with your upgraded PACER account (see instructions if necessary, for <u>upgrading your PACER account</u>). Enter your Username and Password and select Login. *Do not log on using a shared PACER account*.
- 3. After logging in you will notice the limited menu bar. You have access to PACER. Click on "**Utilities**" on the menu bar. Then click "<u>NextGen Release 1.1 Menu Items</u>".



4. Select Link a CM/ECF account to my PACER account.



5. Enter your Alabama Middle District CM/ECF login and password and press **Submit**. This court-issued account is the one you have been using to file pleadings in your cases with the Alabama Middle District. If you have forgotten your password, you may <u>click this link to reset it</u>.

ink a CM/ECF account to my PACER account
his utility links your PACER account with your e-filer account in this court.
you use CM/ECF for PACER only, no action is necessary.
Fyou had a CM/ECF e-filing account in this court before the court converted to NextGen CM/ECF, e b link the accounts (or go back if the names don't match).
CM/ECF login:
CM/ECF password:
Submit Clear
orgot login/password fore about Upgraded PACER account

 Make sure you are linking to your individual, upgraded PACER account. Verify you have entered the correct CM/ECF and PACER names. If not, then do not proceed. Call the Alabama Middle District at (334) 954-3935 for assistance. Click Submit if the two accounts to be linked are correctly displayed.

Link a CM/ECF account to my PACER account
Do you want to link these accounts?
CM/ECF Aty Alex
PACER Alex Attorney
After you submit this screen, your old e-filing credentials for the CM
Submit Clear

- 7. A confirmation message will appear. Your court-issued e-filing credentials for CM/ECF filing are now linked to your upgraded PACER account.
 - a. You will now use your upgraded PACER account to e-file in the Alabama Middle District.
 - b. Your old (court-issued) CM/ECF log in and password *will no longer be used or valid*.



- 8. Click on one of the menu items on the **Menu** bar (except **Log Out**) to update the menu options.
- 9. The **Civil** and **Criminal** menu items now appear along with the others. This account is now ready for e-filing documents.
- 10. If the **Civil** and **Criminal** menu items did not appear, try the following steps:
 - a. Refresh your screen.
 - b. Log out, shut down your web browser, open your web browser again, and then log back in.

11. Reminders:

- a. You will now use your PACER Username and Password to log in to the Alabama Middle District to both view documents and file pleadings.
- b. You must complete the linking process for each additional court where you e-file as that court migrates to NextGen CM/ECF.
- c. For courts that have not migrated to NextGen, you will continue to e-file with the court-provided CM/ECF log in and password for that specific court.

Maintaining Your Account

All attorney information, other than *secondary* email addresses, is held in the attorney's PACER account. It is the attorney's responsibility to keep this account information current.

- 1. To Update Your Address Information:
 - a. Open your web browser and go to <u>pacer.uscourts.gov</u>. Note that this can also be accessed through CM/ECF by clicking **Utilities > Maintain Your Account**.
 - b. Click on "Manage Your Account" from the Quick Access blocks.



What can we help you accomplish?

- c. Click on the Maintenance tab.
- d. Select Update Address Information.



- e. Use the text fields to update the necessary information. Be sure to notate *a reason* for the update.
- f. Apply the update to **All Cases** so the information is updated in every case.

Reason for update	Firm location changed.	
Check here	if this address update applies to the entire firm.	
Apply update to	All Cases	
	Select	
	All Cases	
	Closed Cases	
Apply Updates t	o Sele Open Cases	

g. Check all boxes so that the update is applied to your PACER billing and each court that your account is associated with. Verify all the information is correct. Click **Submit**.

Apply Updates to Selected Courts				
PACER	Billing			
	Law Offices of John Q. Public 123 Any Street Oklahoma City, OK 73102 Phone: 555-555-3232			
	ABAMA MIDDLE DISTRICT COURT Unable to retrieve data at this time			
	Submit Reset Cancel			

h. A confirmation screen will appear noting your submission was successful.

Us	ername IK3403_0KW0
A Ca	Update Address Information
A	Your PACER address information has been successfully changed! Your address change has been sent to the selected courts for review and processing. Please note that this process may not be immediate, and there is a possibility that the court may not accept your change.
U	

- 2. To Update Your Email Information:
 - a. The primary email address is added and updated through PACER. Any secondary email addresses are added and maintained by the attorney through CM/ECF. Email addresses are used for Notices of Electronic Filing (NEFs) and are required for all counsel by the ALMD General Order 2:04-mc-3164. It is recommended that all accounts include a primary email address and *at least* one secondary email address for the purpose of receiving NEFs from the Court.
 - b. To update your primary email:
 - i. Navigate to pacer.uscourts.gov. Note that this can also be accessed through CM/ECF by clicking **Utilities > Maintain Your Account**.

ii. Click on "Manage Your Account" from the Quick Access blocks.



What can we help you accomplish?

- iii. Click on the Maintenance tab.
- iv. Select Update E-filer Email Noticing and Frequency.



- v. Check the box to apply your changes to the Alabama Middle District.
- vi. Enter and confirm the **Primary Email Address**, select frequency and format preferences, and click **Submit**.

	DDLE DISTRICT COURT	
Click to	apply changes to this court	
Unabl	e to retrieve data at this time	
Required Informatio	n	
Primary Email *	test@test.com	
Primary Email * Confirm Email *	test@test.com	
Confirm Email *	test@test.com	
-		

vii. A confirmation screen will appear. Click Close.



United States District Court for the Middle District of Alabama

https://www.almd.uscourts.gov

COURT LOCATIONS

Frank M. Johnson Jr. U.S. Courthouse Complex One Church Street, Montgomery AL 36104 General Phone: (334) 954-3600

Federal Building & U.S. Courthouse (trials only) 100 West Troy Street, Dothan AL 36303 General Phone: (334) 954-3600

G.W. Andrews Federal Building & U.S. Courthouse (trials only) 701 Avenue A, Opelika AL 36801 General Phone: (334) 954-3600