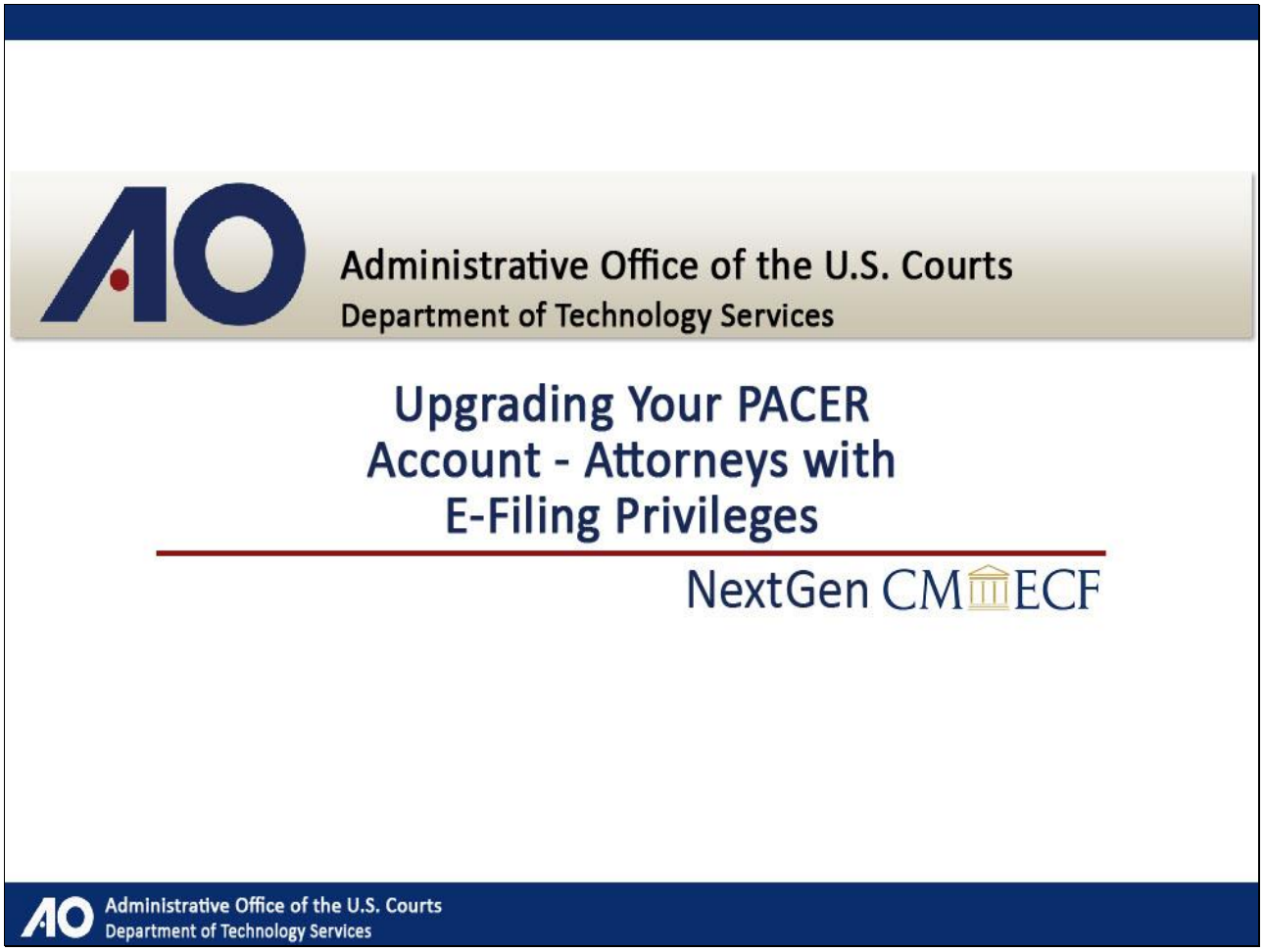
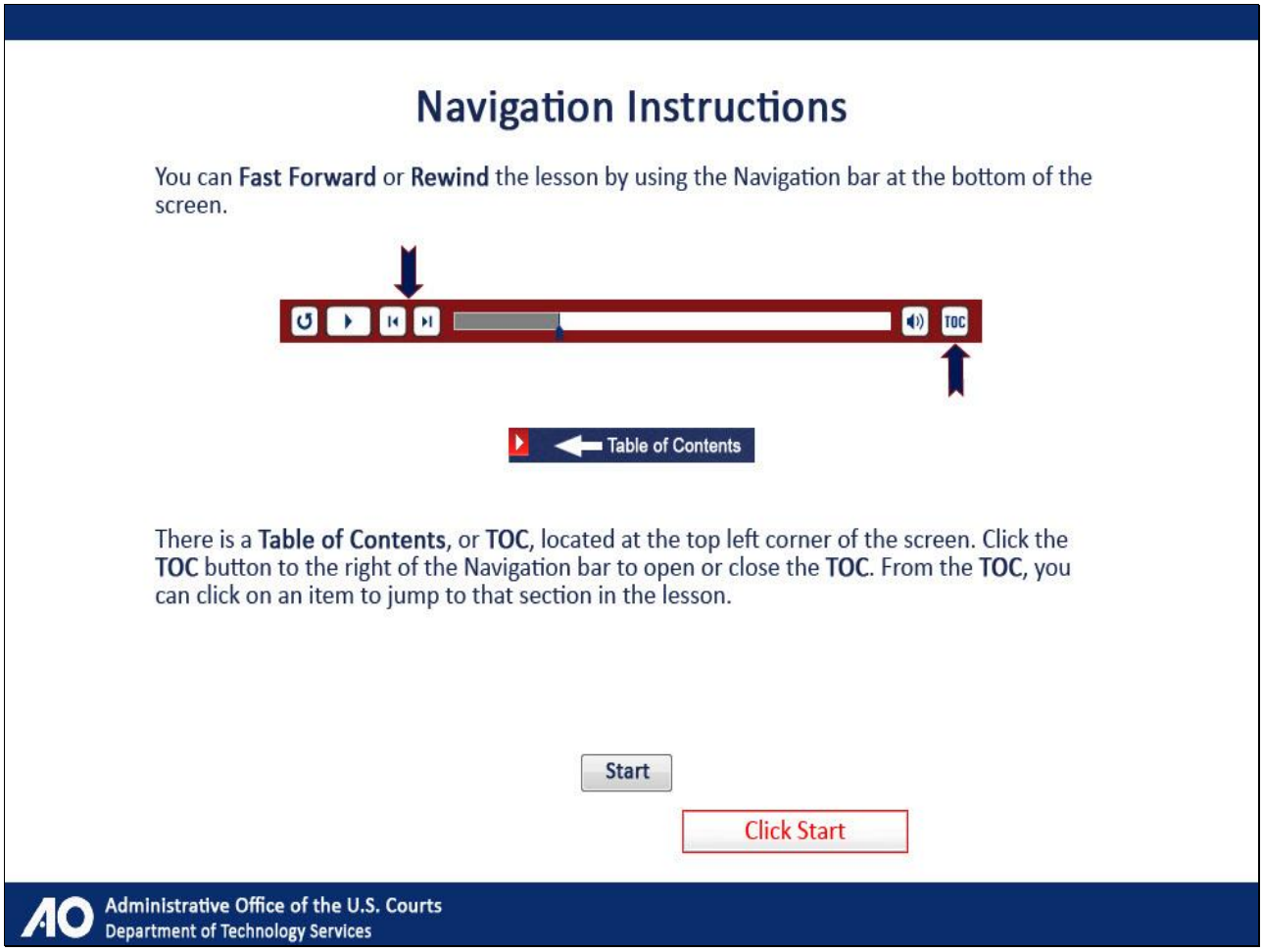
Slide 1 - Welcome



Note to student:

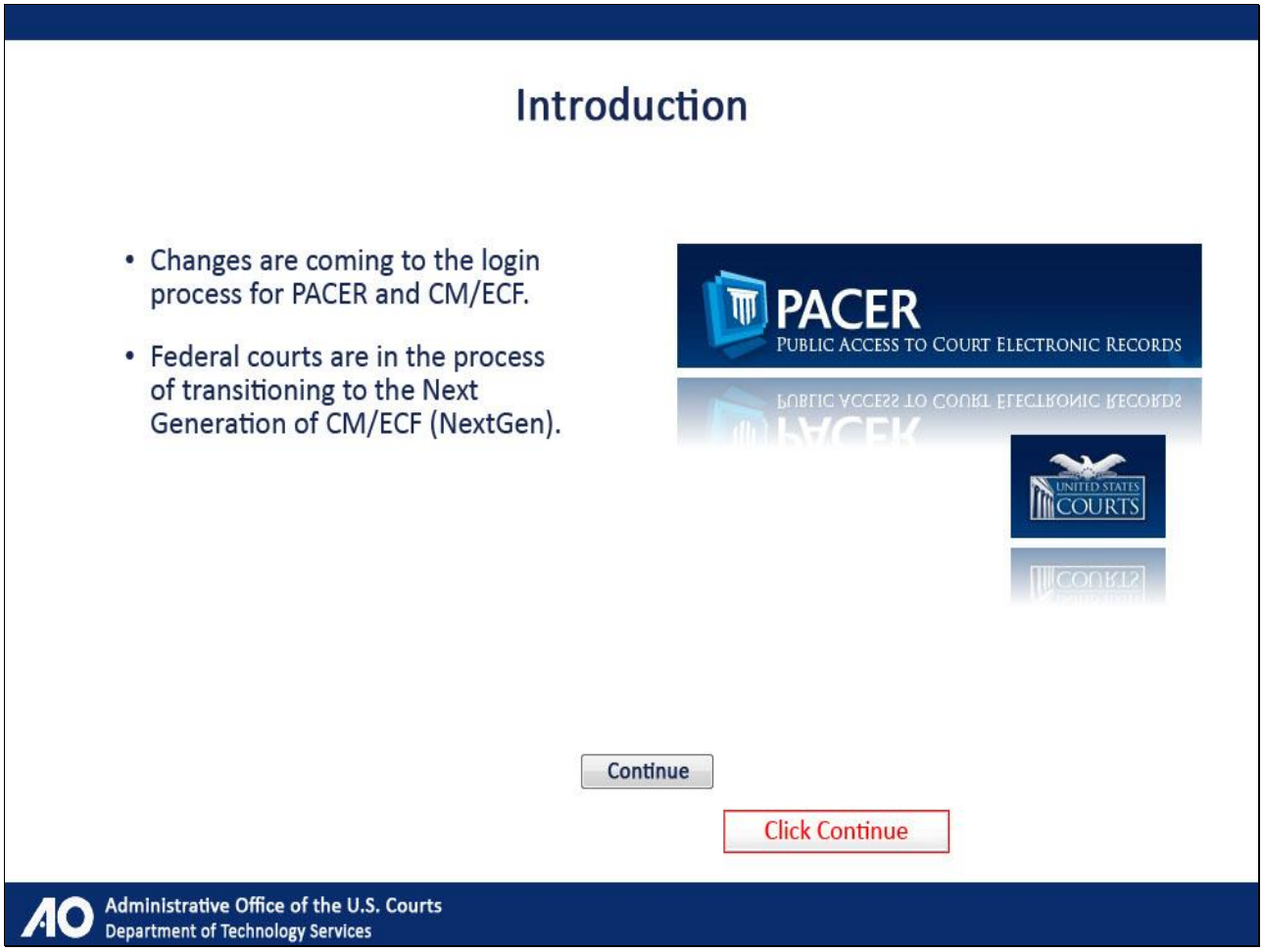
The slide numbering in the electronic version of this lesson versus the print version is slightly different for technical reasons. However, the layout is the same. In addition, some text was added to the print version to assist in comprehension.

Slide 2 - Navigation



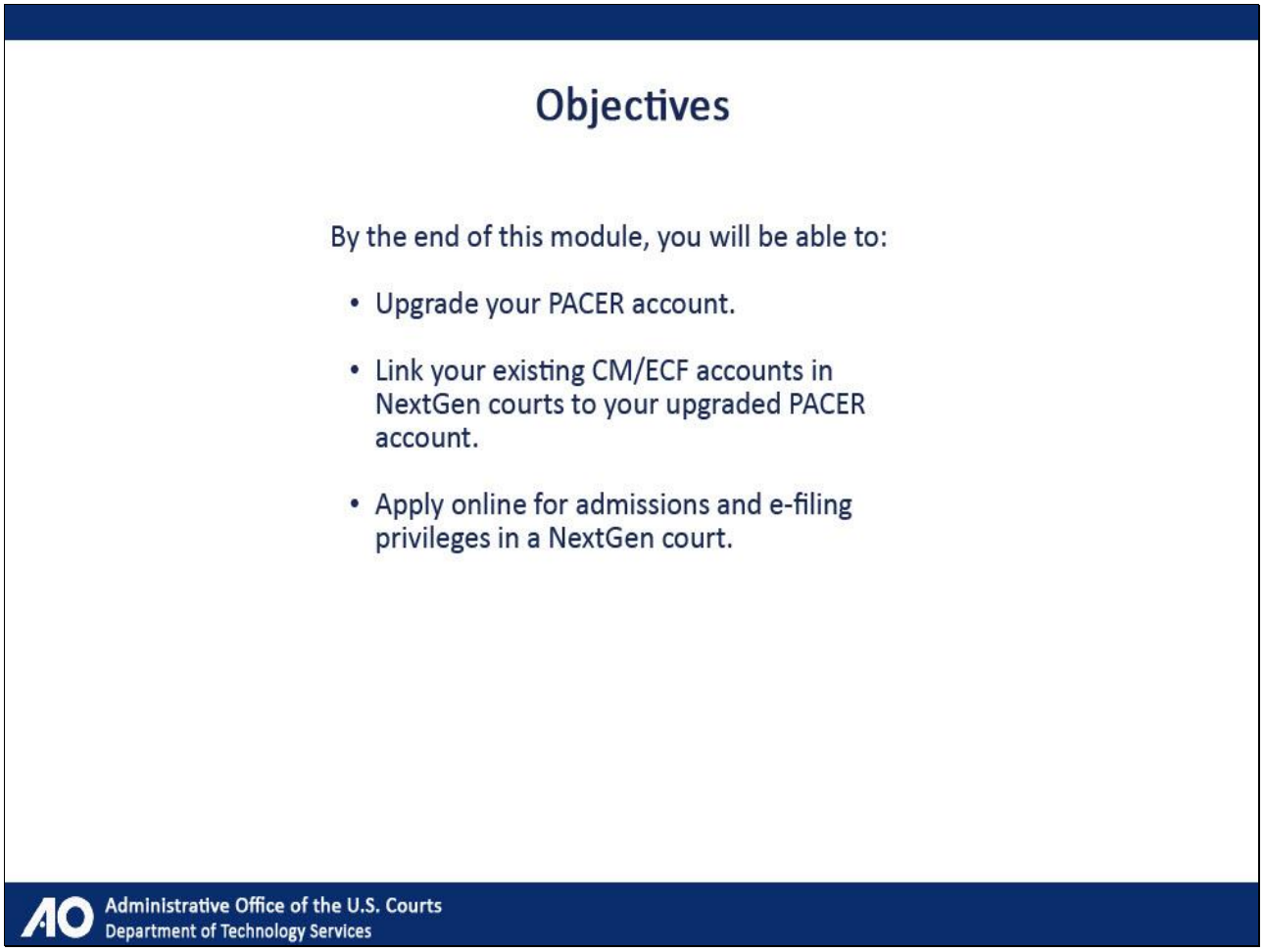
Here are the instructions for navigating through this tutorial. Click Start when you're ready to begin.

Slide 3 - Introduction



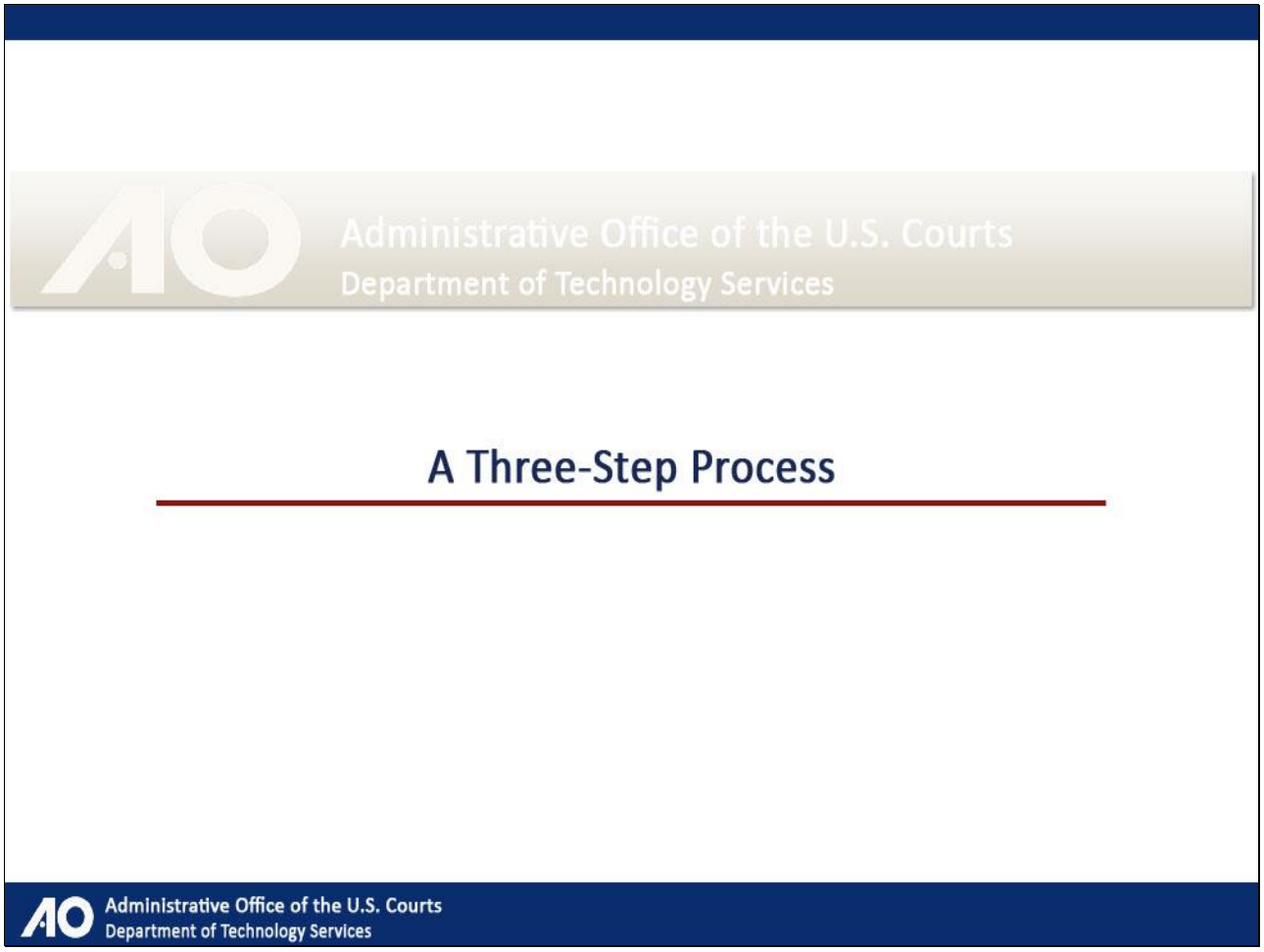
Welcome! As you may have heard, changes are coming to the login process for PACER and CM/ECF. Federal courts are in the process of transitioning from their current CM/ECF system to the Next Generation of CM/ECF, or NextGen, which among other things will provide a new login module for these court systems. This training module will walk you through the process of upgrading your PACER account. Click Continue.

Slide 4 - Objectives

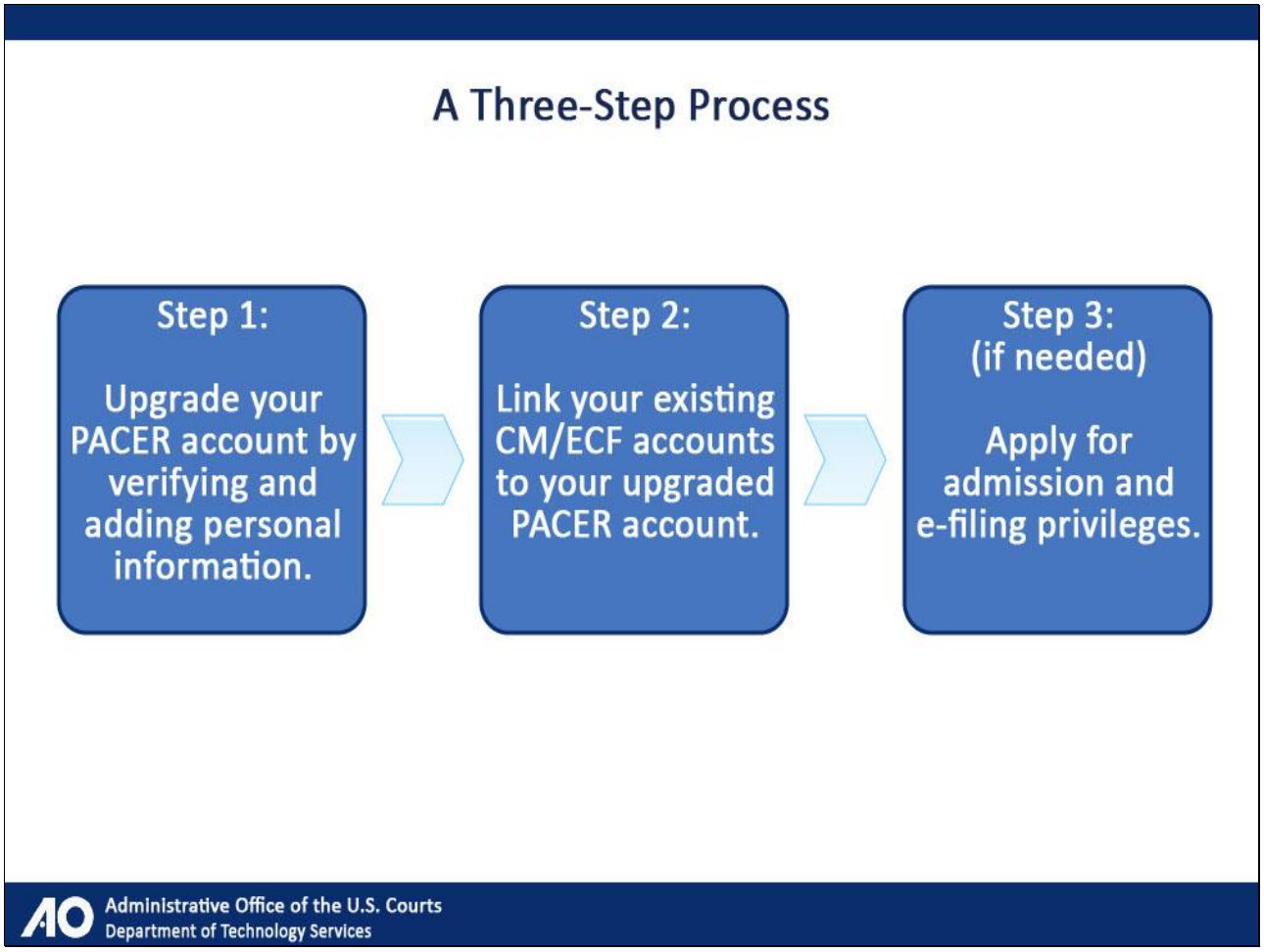


By the end of this module, you will be able to upgrade your PACER account, link your existing CM/ECF accounts in NextGen courts to your upgraded PACER account, and apply online for admissions and e-filing privileges in a NextGen court.

Slide 5 - A Three-Step Process

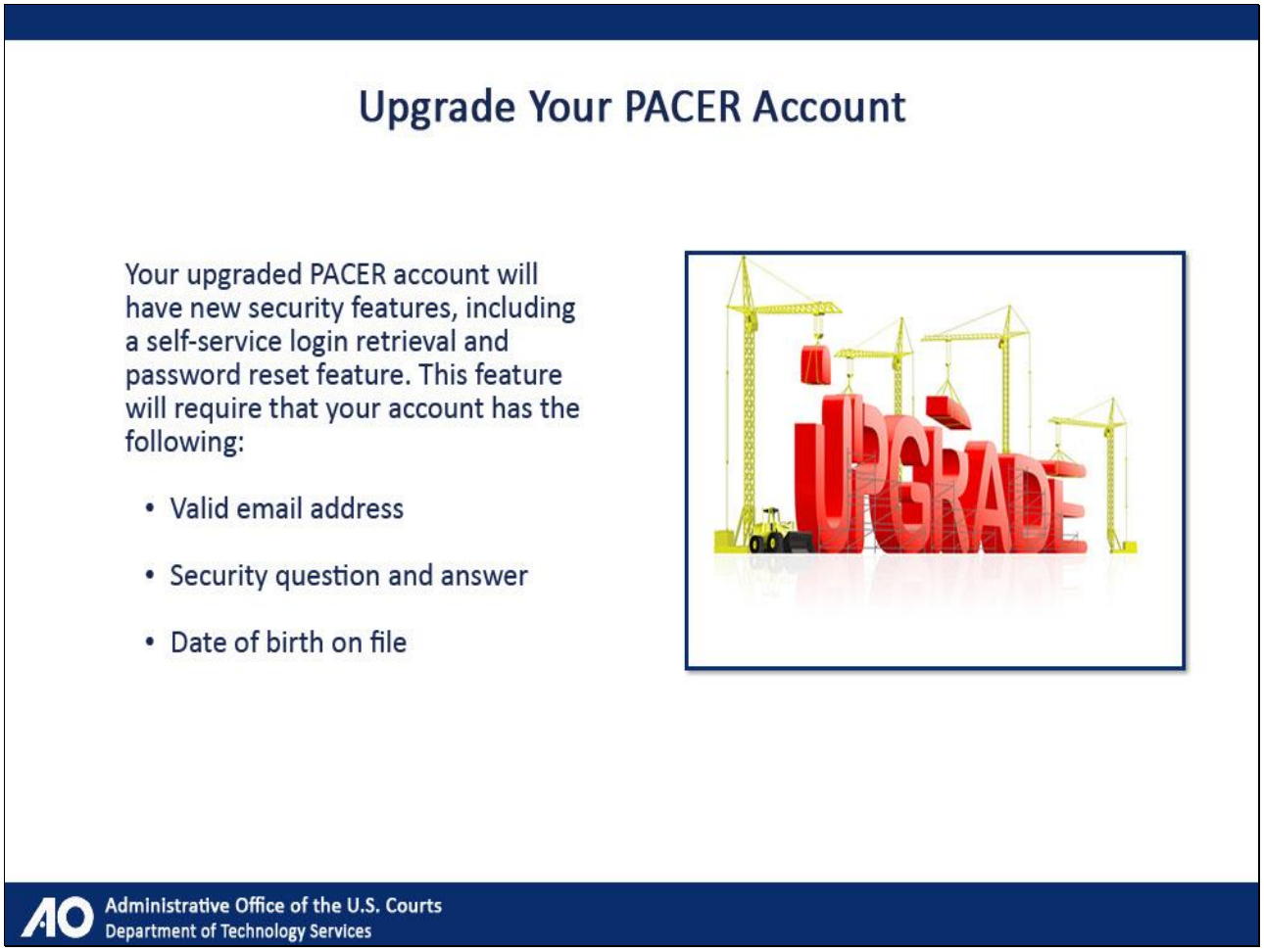


Slide 6



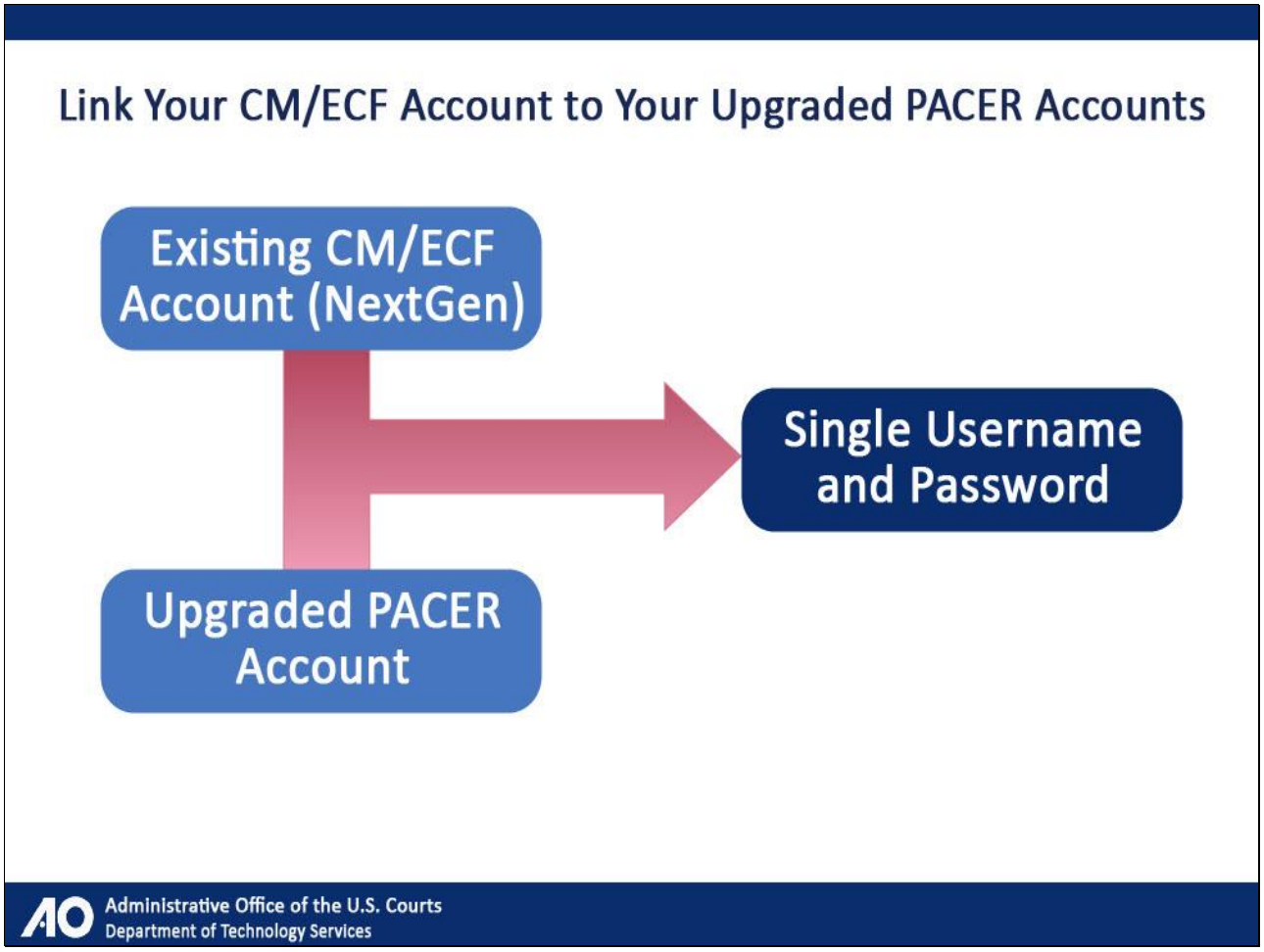
This tutorial will guide you through the three-step process to upgrade your PACER account in order to take advantage of the benefits of the new login feature. The steps include upgrading your PACER account by verifying and adding personal information, linking your existing CM/ECF accounts to your upgraded PACER account, and applying for admission and e-file privileges, if needed.

Slide 7



Your upgraded PACER account will have new security features, including a self-service login retrieval and password reset feature. This feature will require that your account has a valid email address, security question and answer, and date of birth on file.

Slide 8



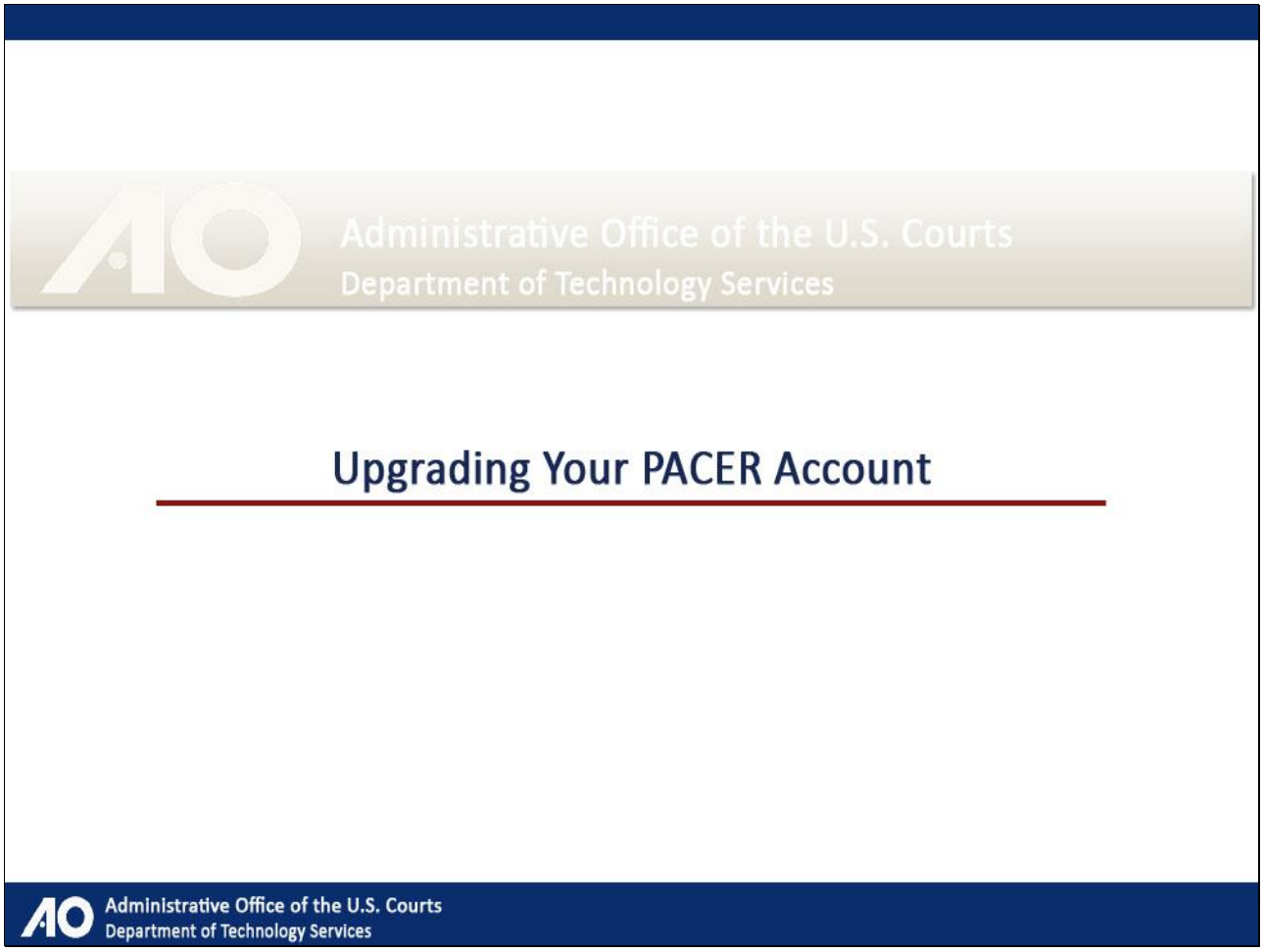
Once the transition to NextGen is complete, the main advantage of the new login feature for attorneys will be the use of a single username and password, to be used whenever you need to access a court. This is accomplished by linking all of your existing CM/ECF accounts issued by NextGen courts to your upgraded PACER account.

Slide 9

For attorneys, e-file registration and admissions to each NextGen court will be submitted online at www.pacer.gov. Once you have upgraded your PACER account, if you are new to a NextGen court, meaning you have not been admitted to practice in the court or are not registered to e-file there, you will apply for these privileges online through the screens shown later in this tutorial, rather than directly with the court.

Note that this applies only to courts that have implemented NextGen. You will continue to follow the procedures outlined on the court's website for non-NextGen courts.

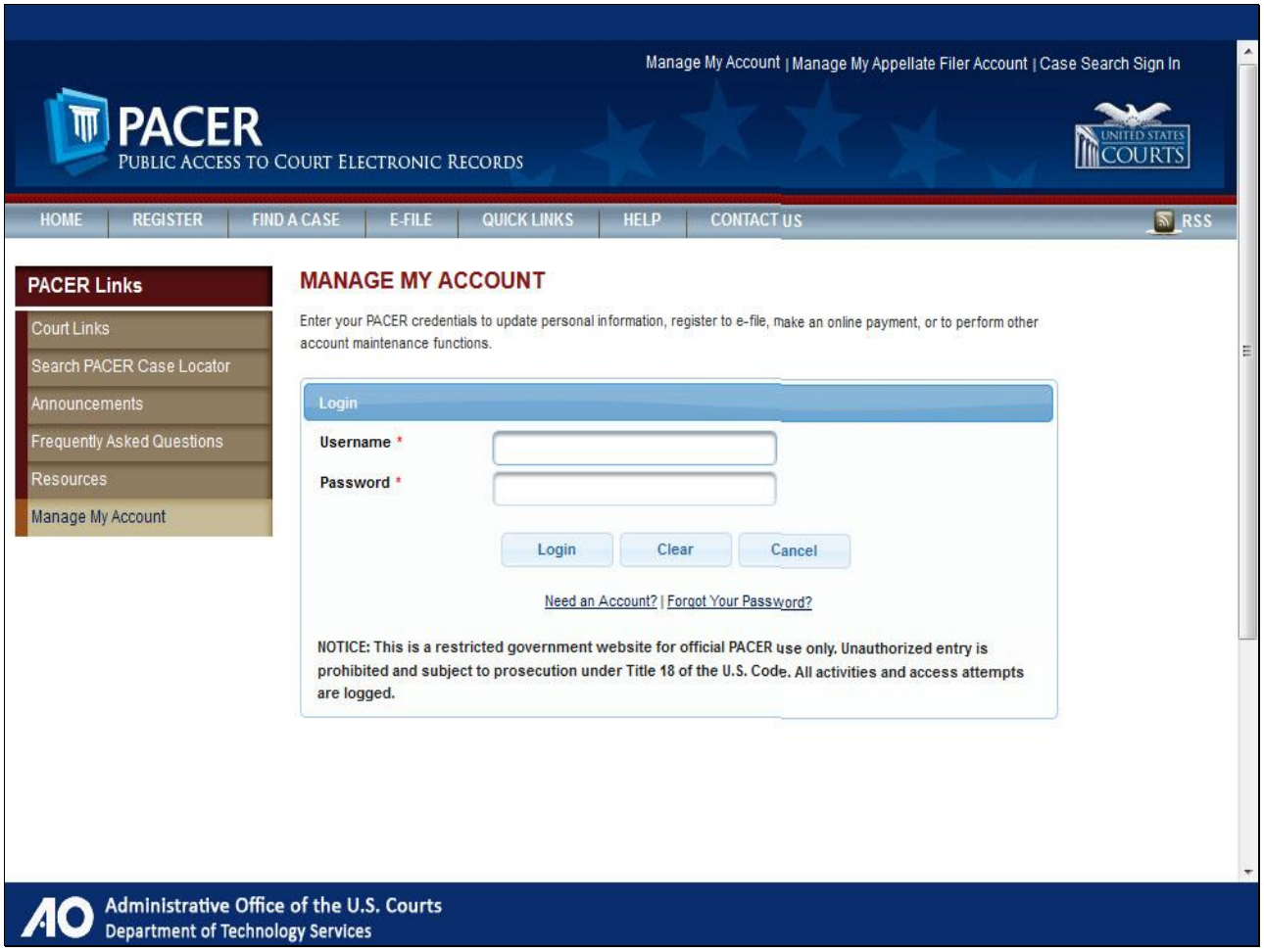
Slide 10 - Upgrading Your PACER Account



Slide 11

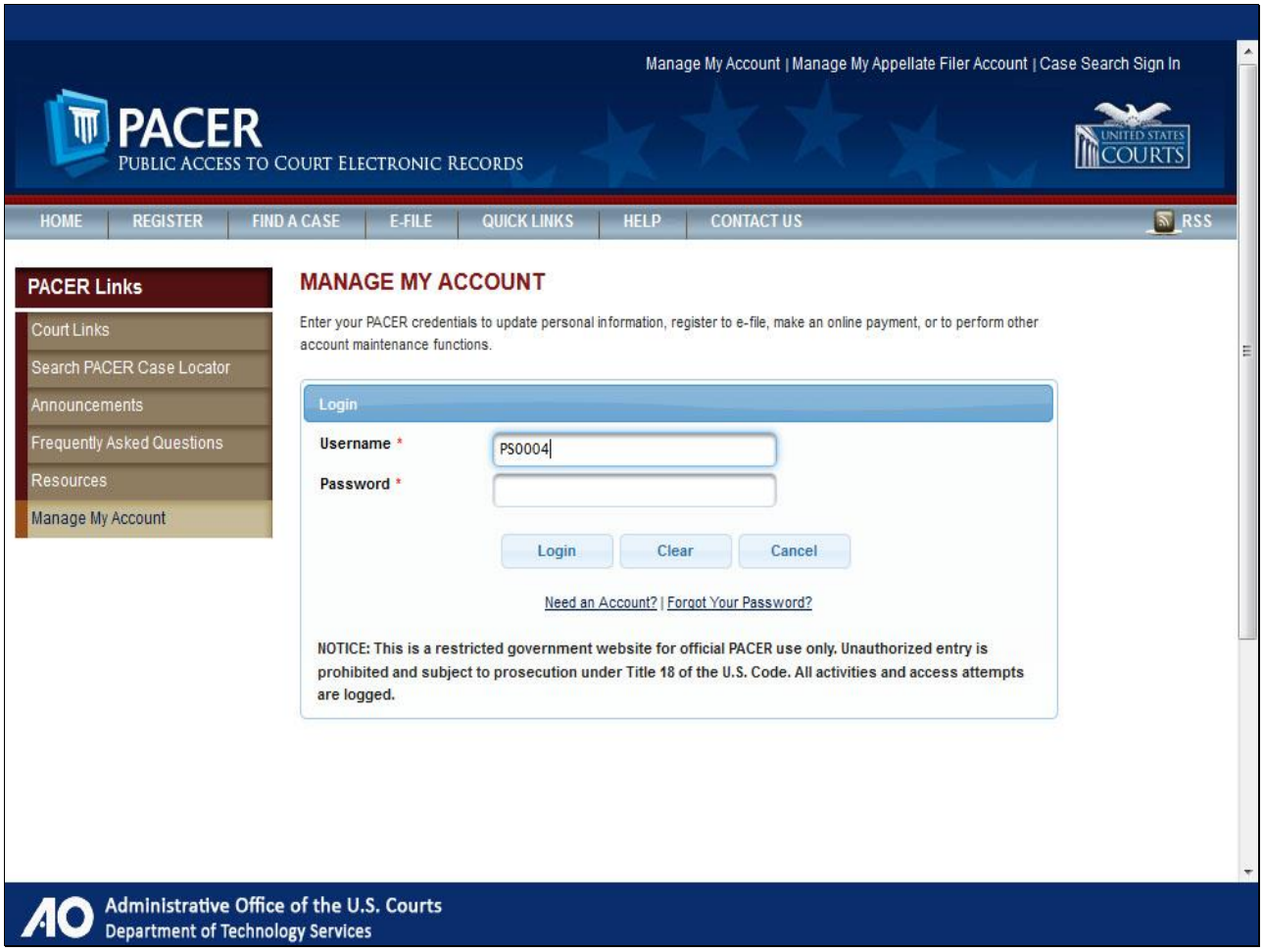
To update your current PACER account, go to www.pacer.gov. On the PACER home page, click Manage My Account.

Slide 12

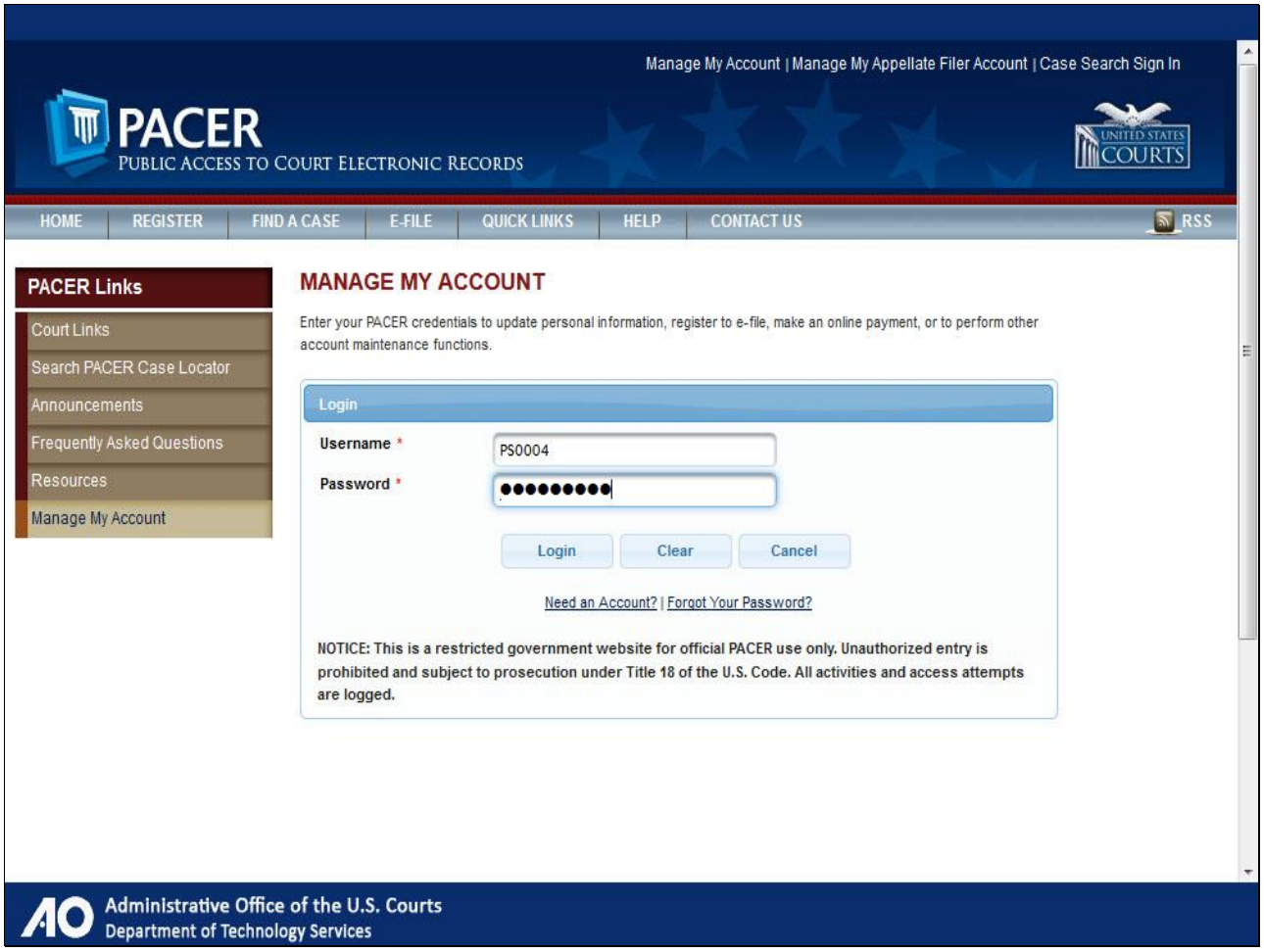


Log in with your current PACER username and password.

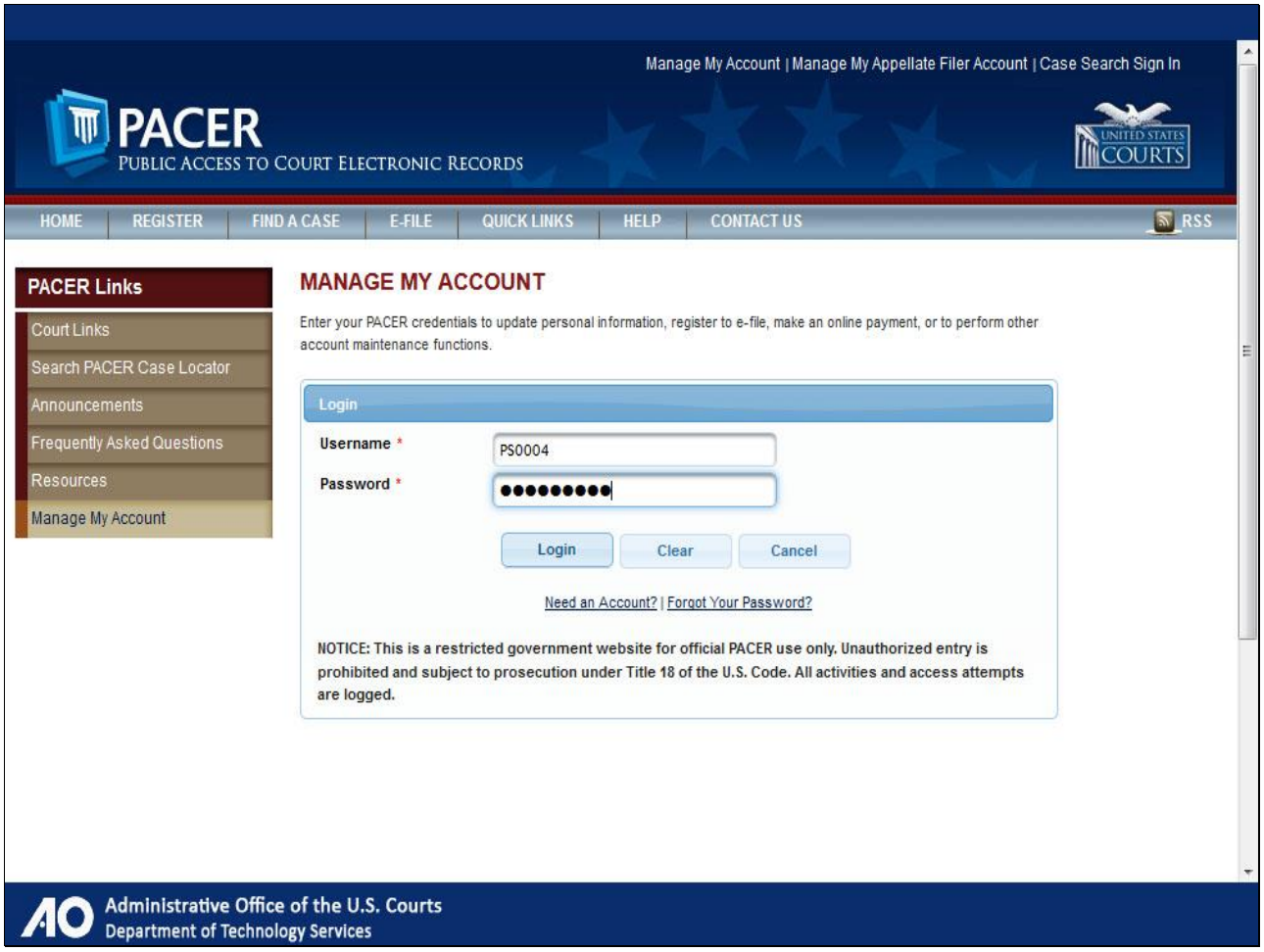
Slide 13


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
PACER Links
Court Links
Search PACER Case Locator
Announcements
Frequently Asked Questions
Resources
Manage My Account
MANAGE MY ACCOUNT
Enter your PACER credentials to update personal information, register to e-file, make an online payment, or to perform other account maintenance functions.
Login
Username *
PS0004
Password *
Login
Clear
Cancel
Need an Account? | Forgot Your Password?
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.
Administrative Office of the U.S. Courts
Department of Technology Services

Slide 14

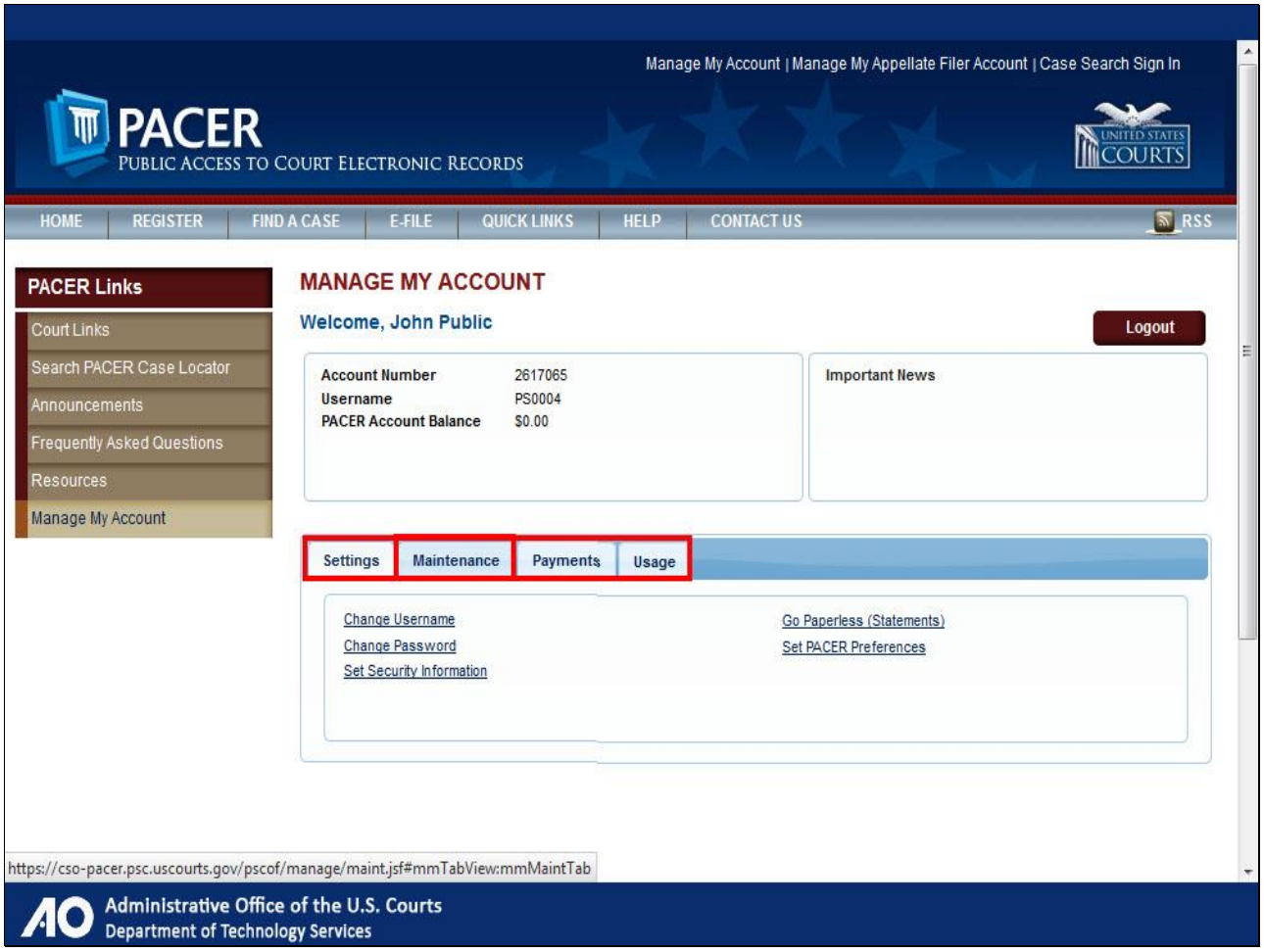

Manage My Account | Manage My Appellate Filer Account | Case Search Sign In
PACER
PUBLIC ACCESS TO COURT ELECTRONIC RECORDS
UNITED STATES COURTS
HOME
REGISTER
FIND A CASE
E-FILE
QUICK LINKS
HELP
CONTACT US
RSS
PACER Links
Court Links
Search PACER Case Locator
Announcements
Frequently Asked Questions
Resources
Manage My Account
MANAGE MY ACCOUNT
Enter your PACER credentials to update personal information, register to e-file, make an online payment, or to perform other account maintenance functions.
Login
Username *
PS0004
Password *
Login
Clear
Cancel
Need an Account? | Forgot Your Password?
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.
Administrative Office of the U.S. Courts
Department of Technology Services

Slide 15



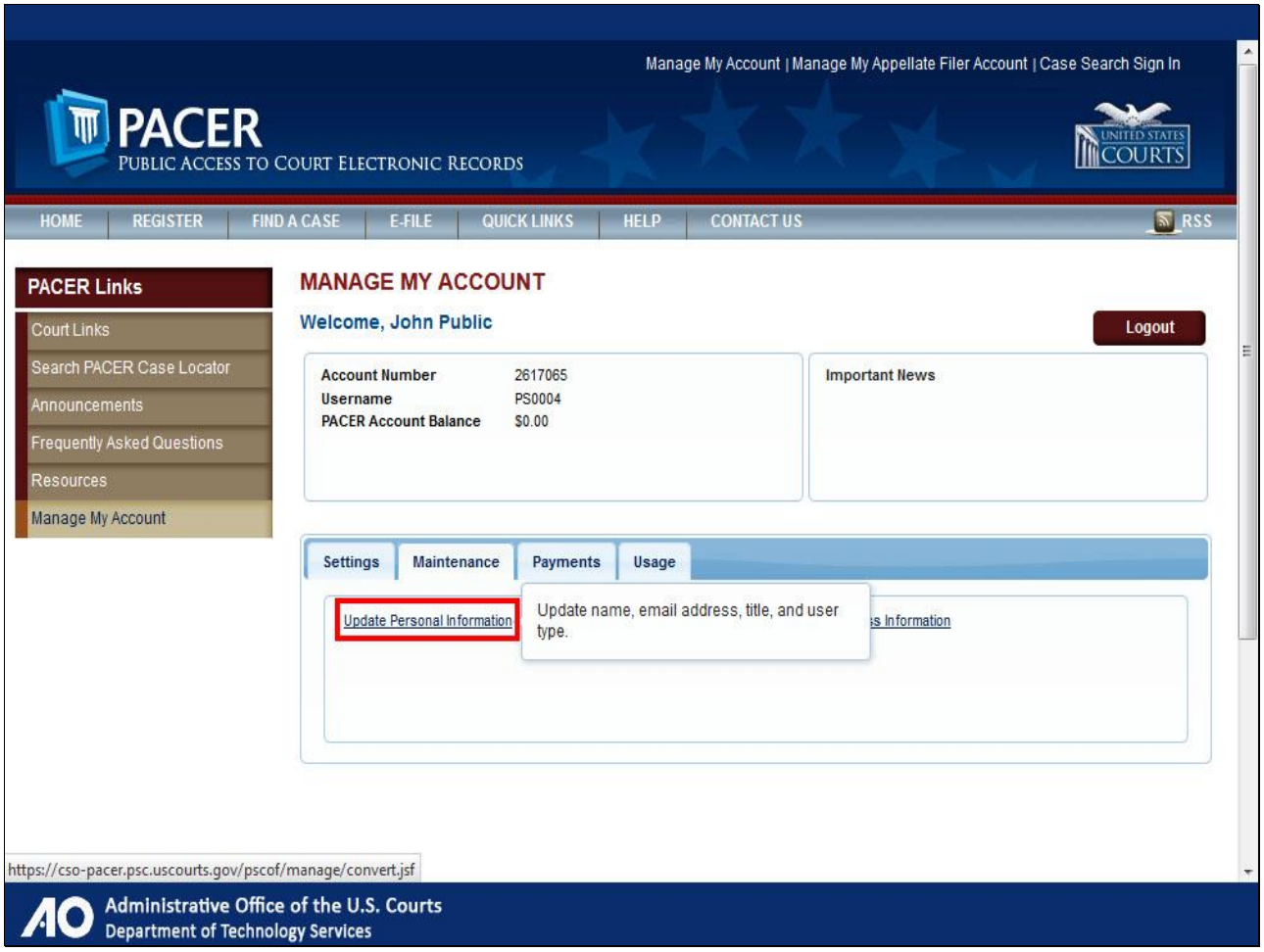
Click Login.

Slide 16



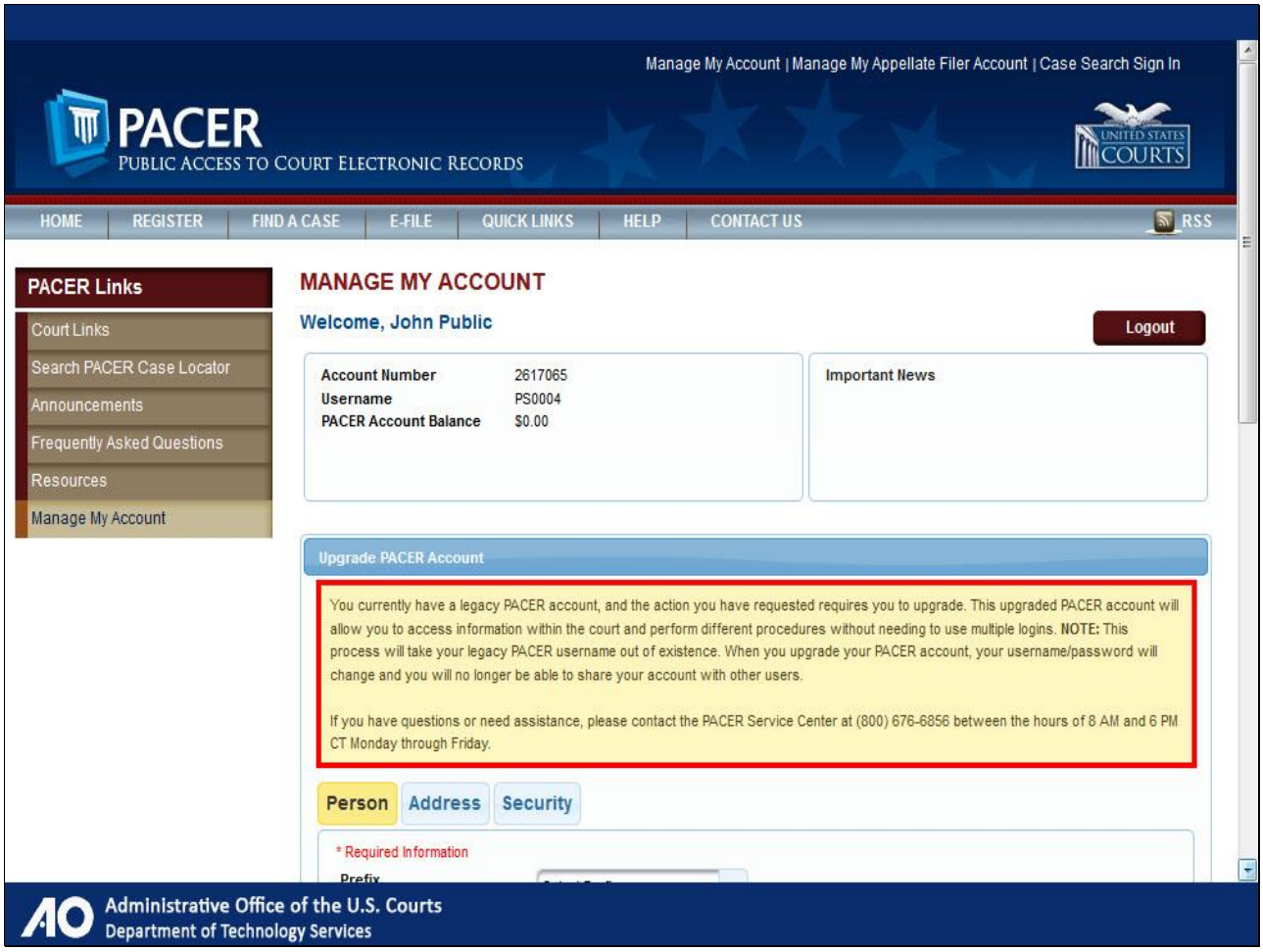
From the Manage My Account page, you will see four tabs. Click Maintenance.

Slide 17



Then click Update Personal Information.

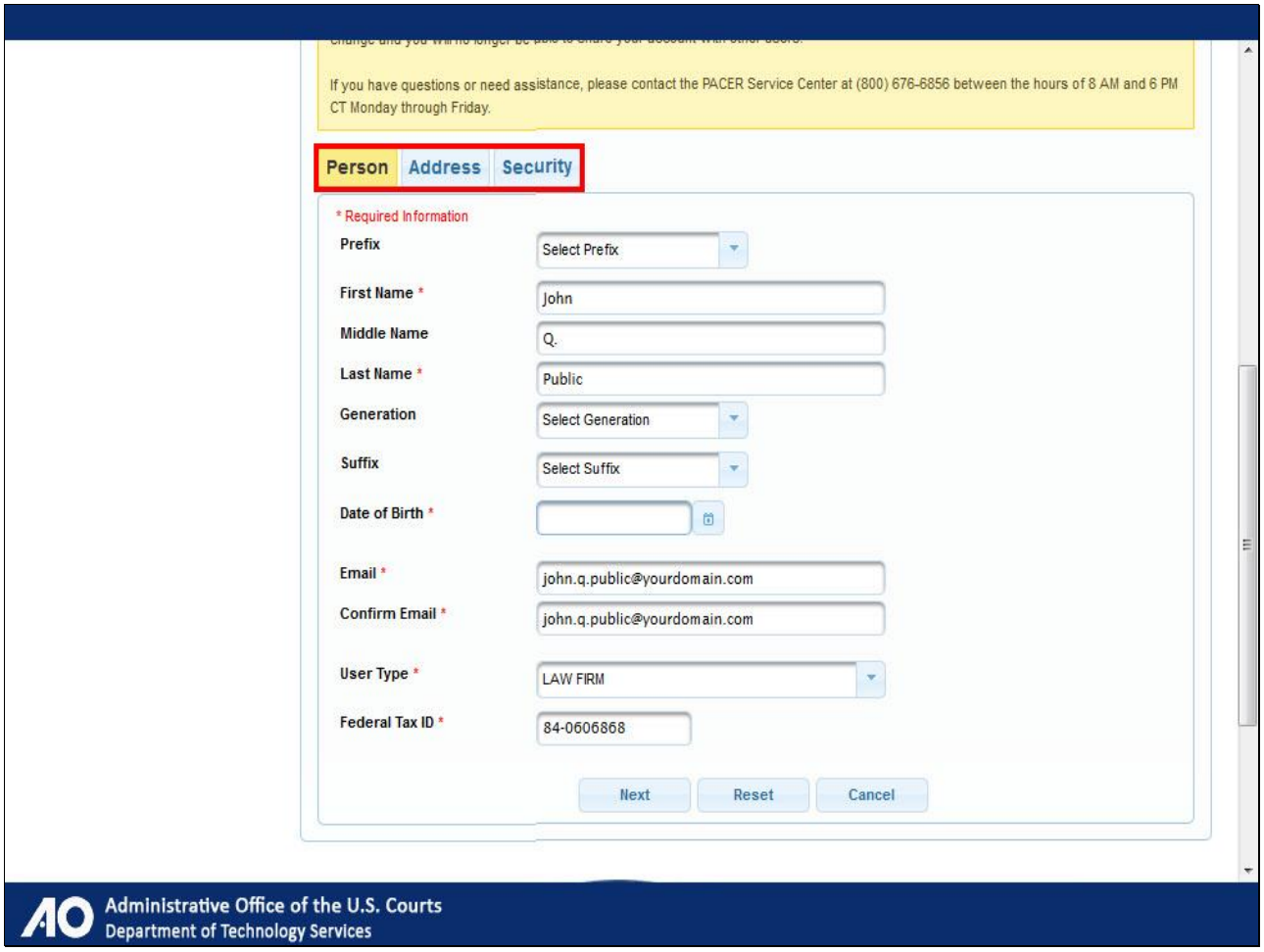
Slide 18



Take a moment to read the note about account conversion. Understand that you are upgrading your PACER account, and can use that account for read-only PACER access to all courts as well as filing access to NextGen courts.

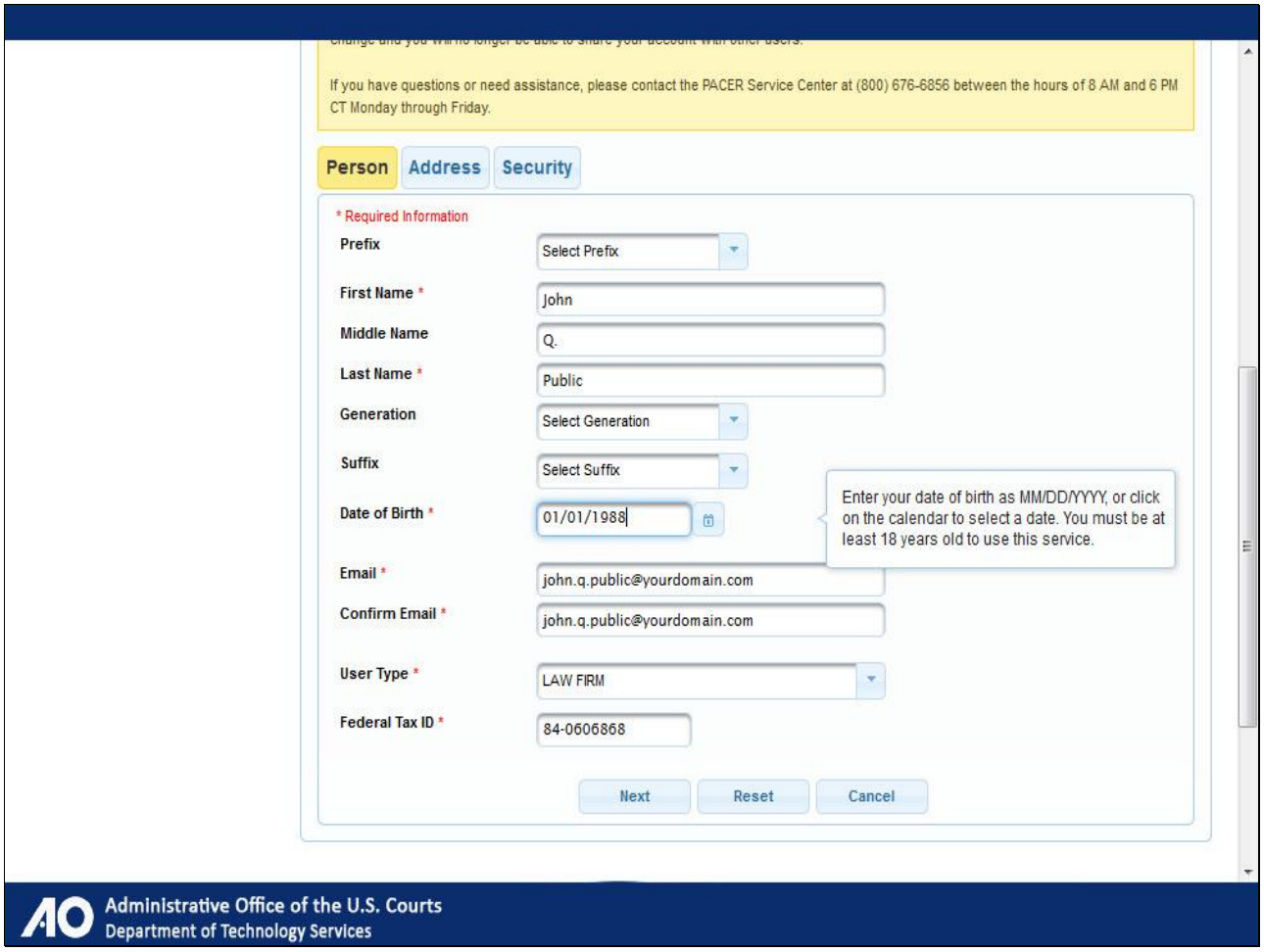
Once the upgrade is complete, you can no longer use your old PACER username and password. Scroll down.

Slide 19



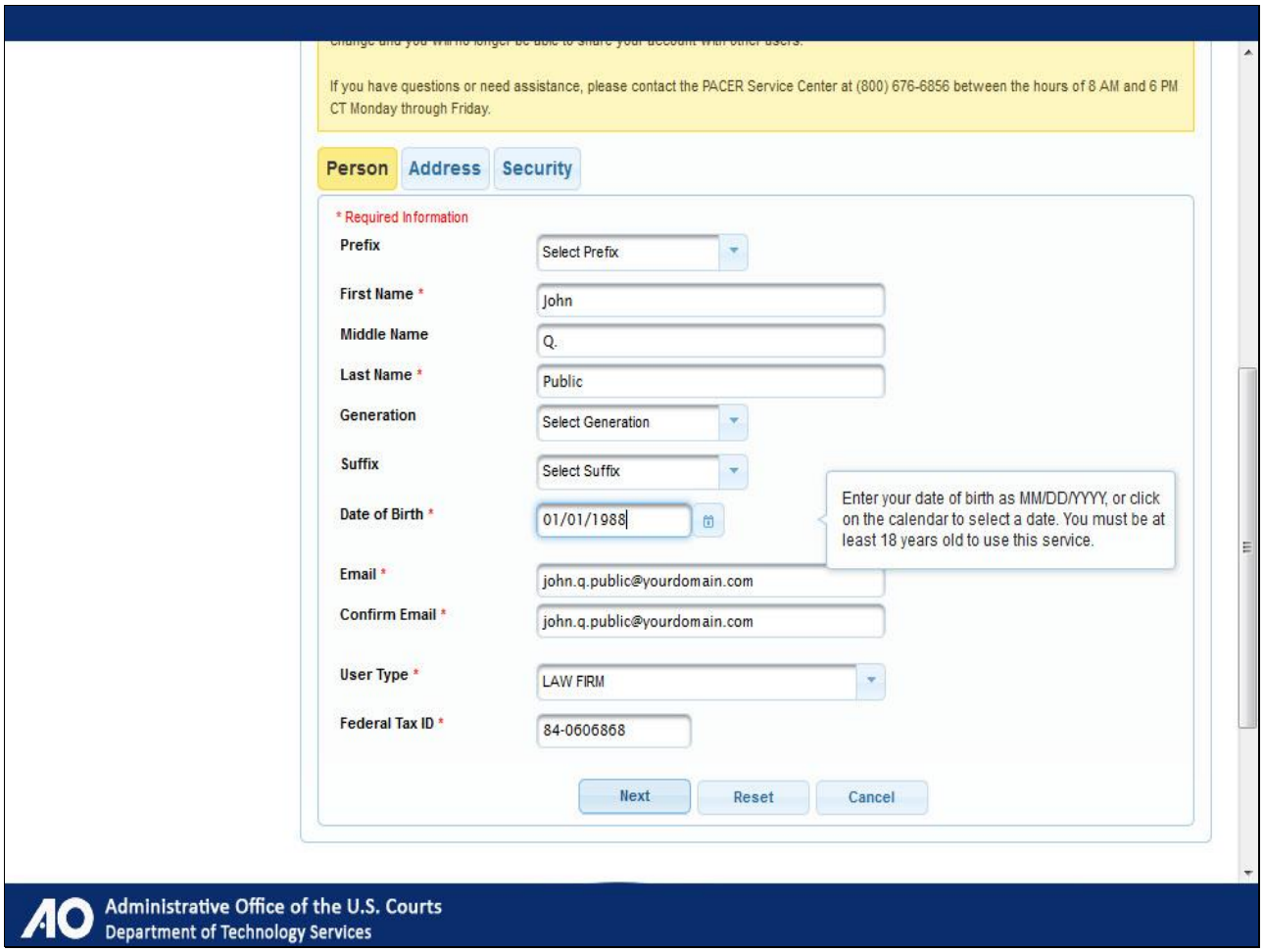
There are three tabs in which you are required to provide information. Note that some fields may have carried over from your current PACER account. For each tab, complete any required fields that are not already populated.

Slide 20



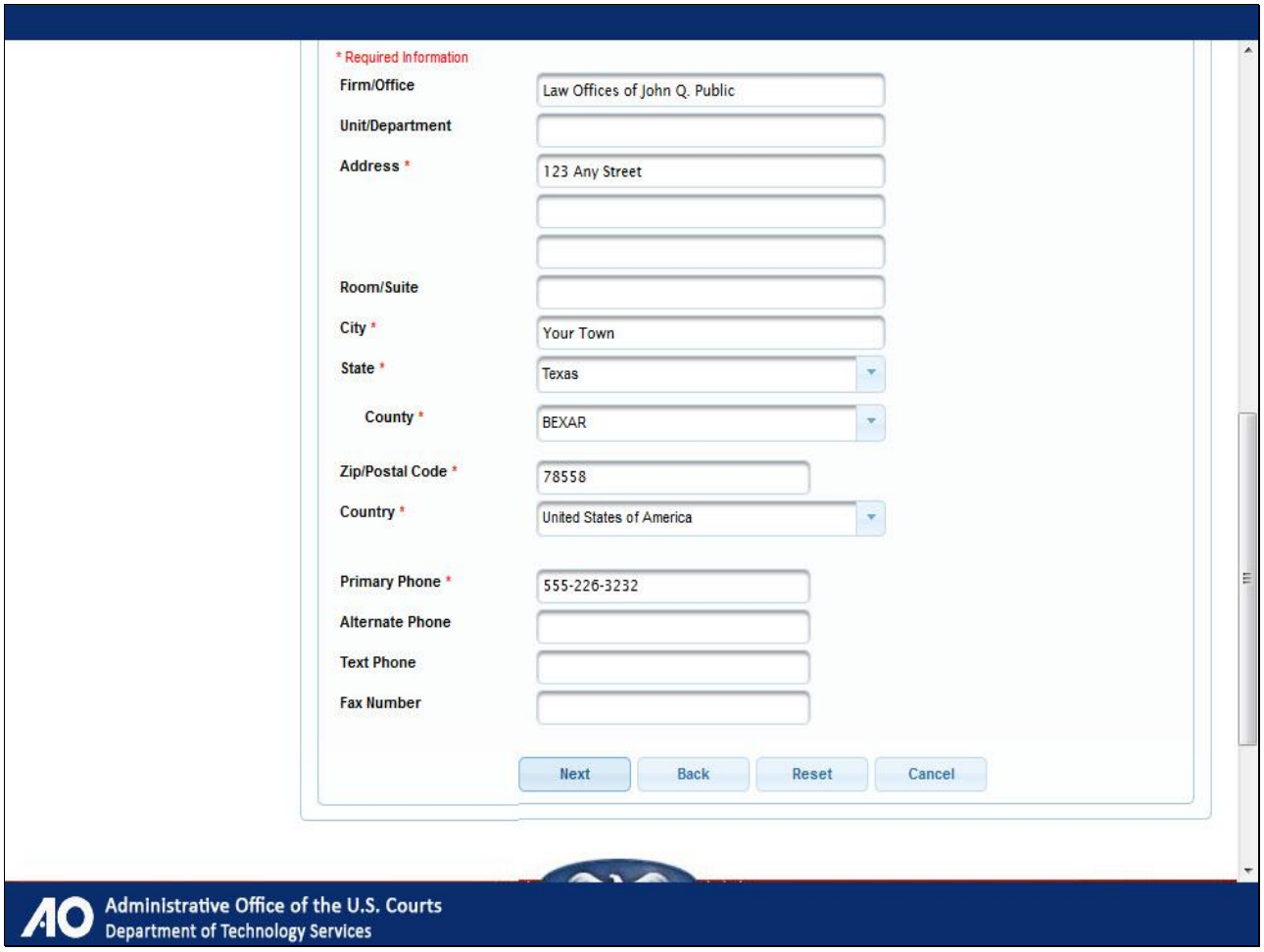
Complete the Date of Birth field.

Slide 21



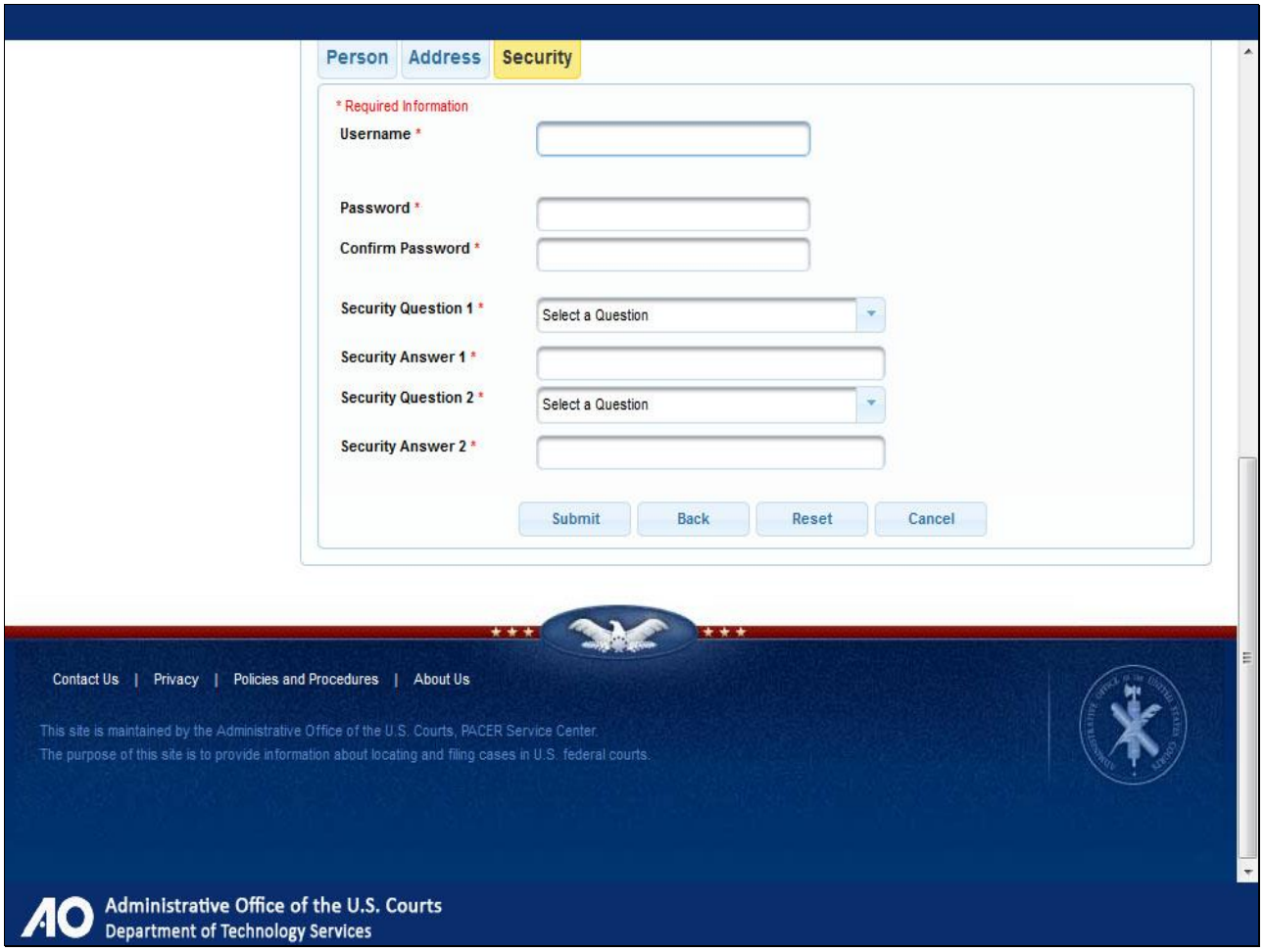
Click Next.

Slide 22



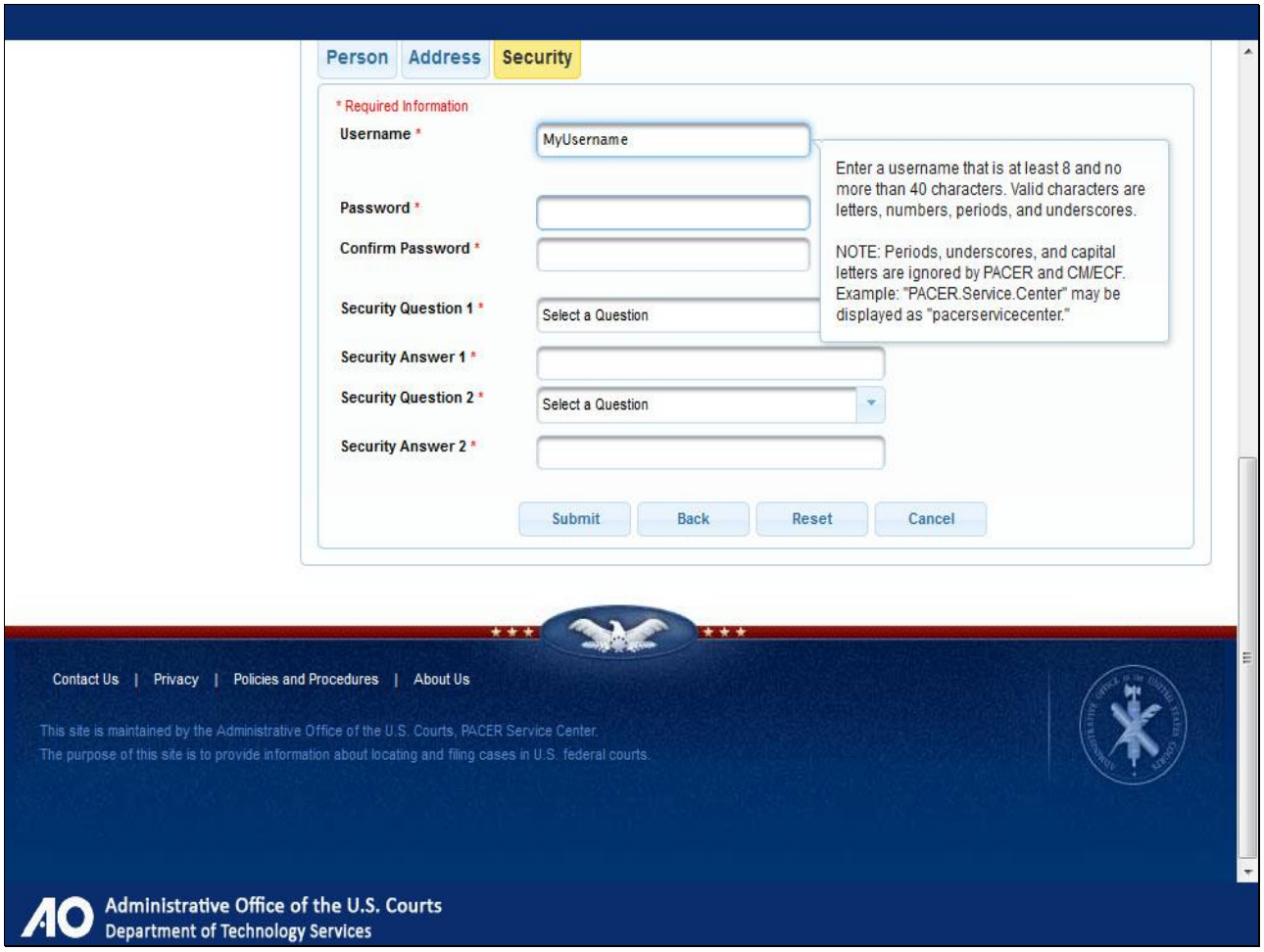
Click Next.

Slide 23



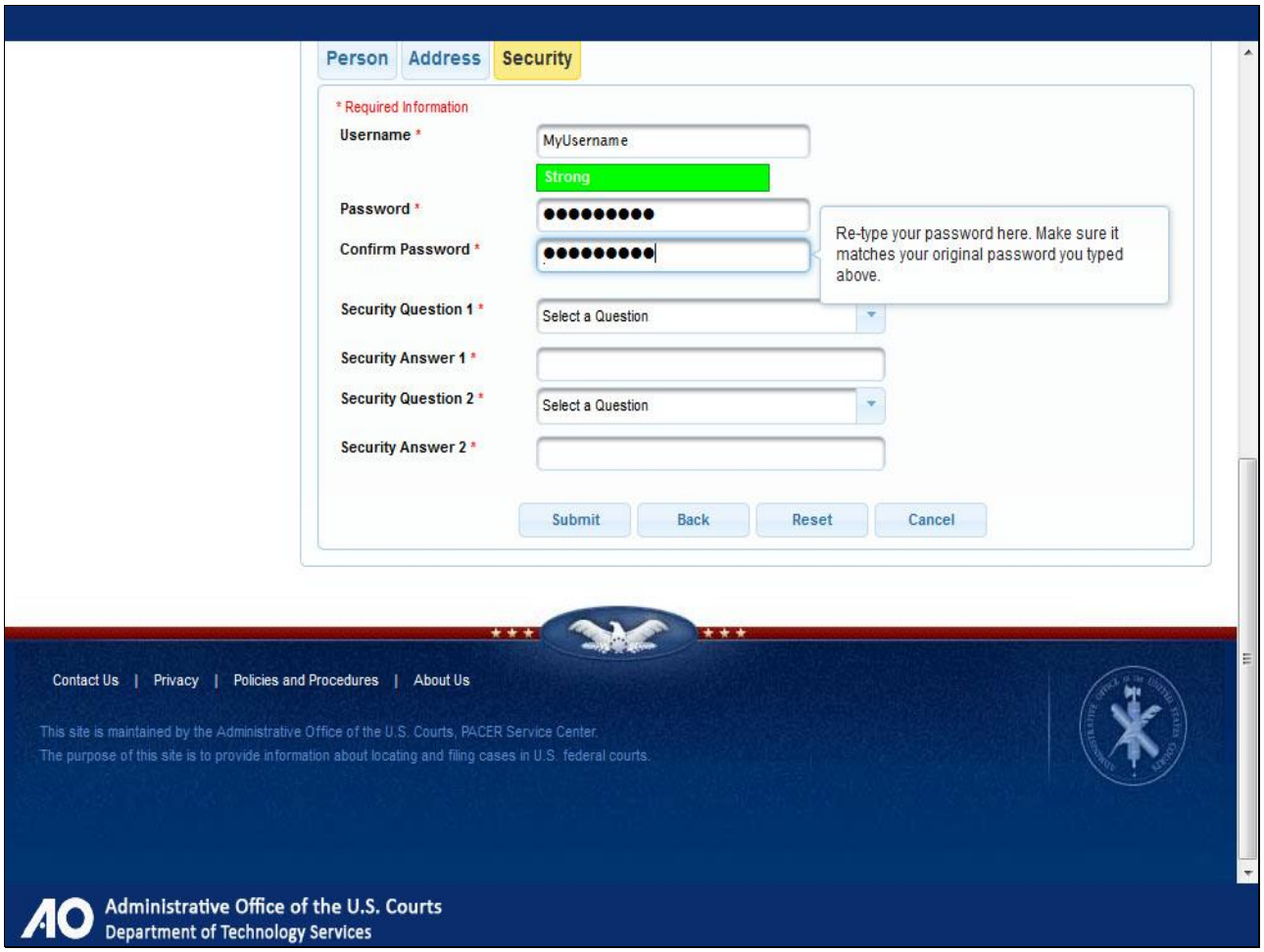
Enter a new username, password, and complete your security questions and answers.

Slide 24



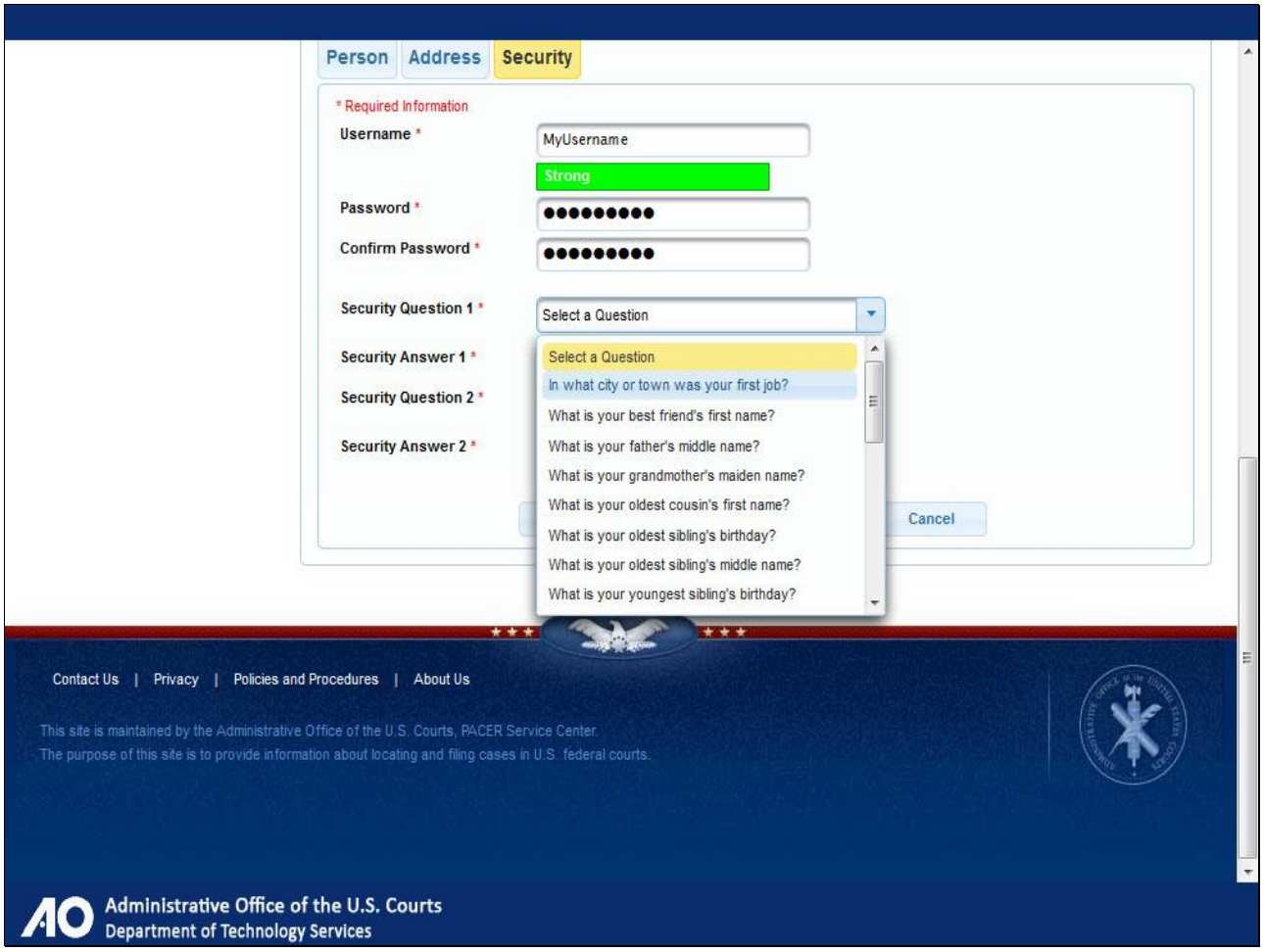
Provide username.

Slide 25



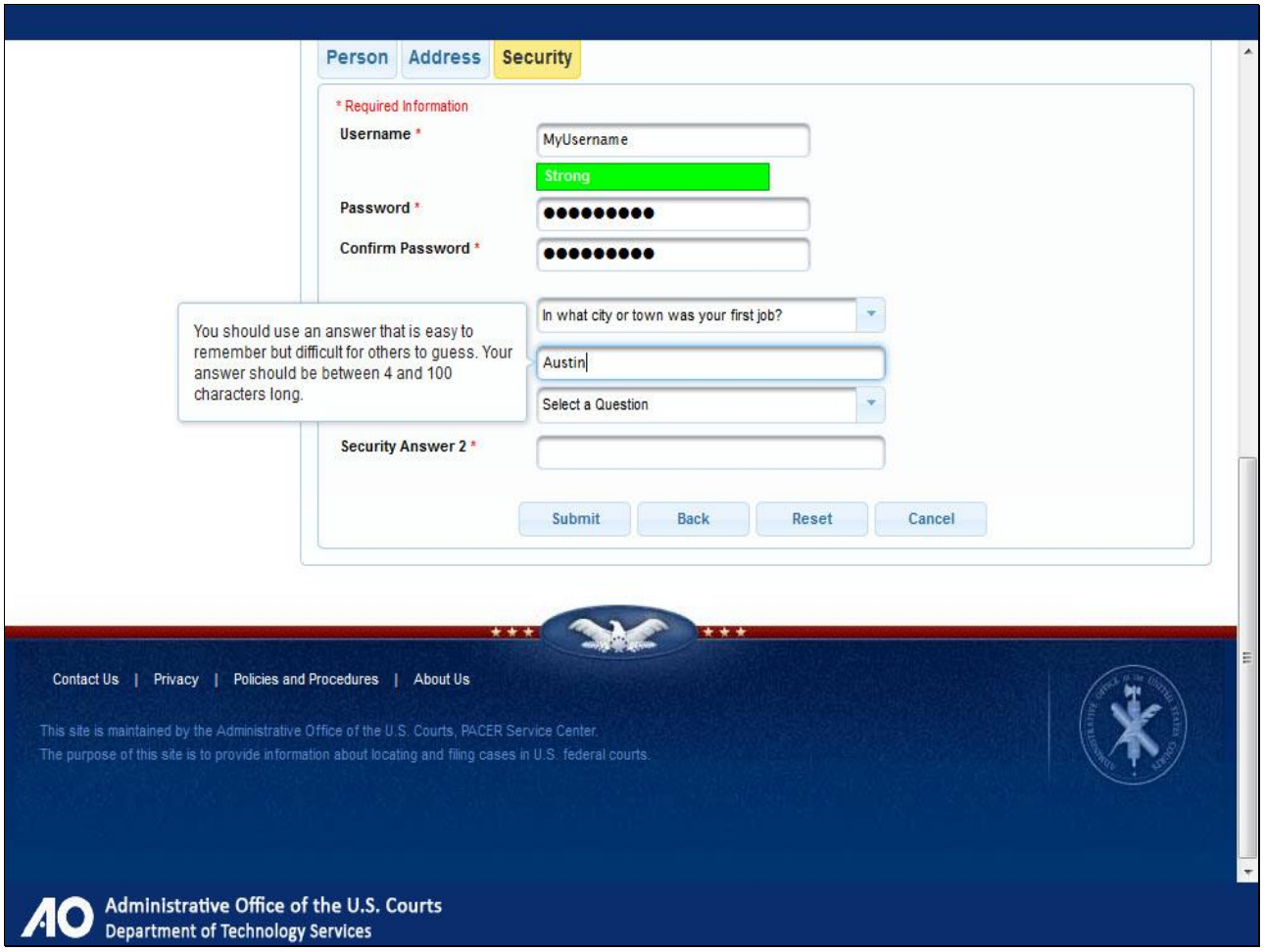
Provide and confirm password.

Slide 26



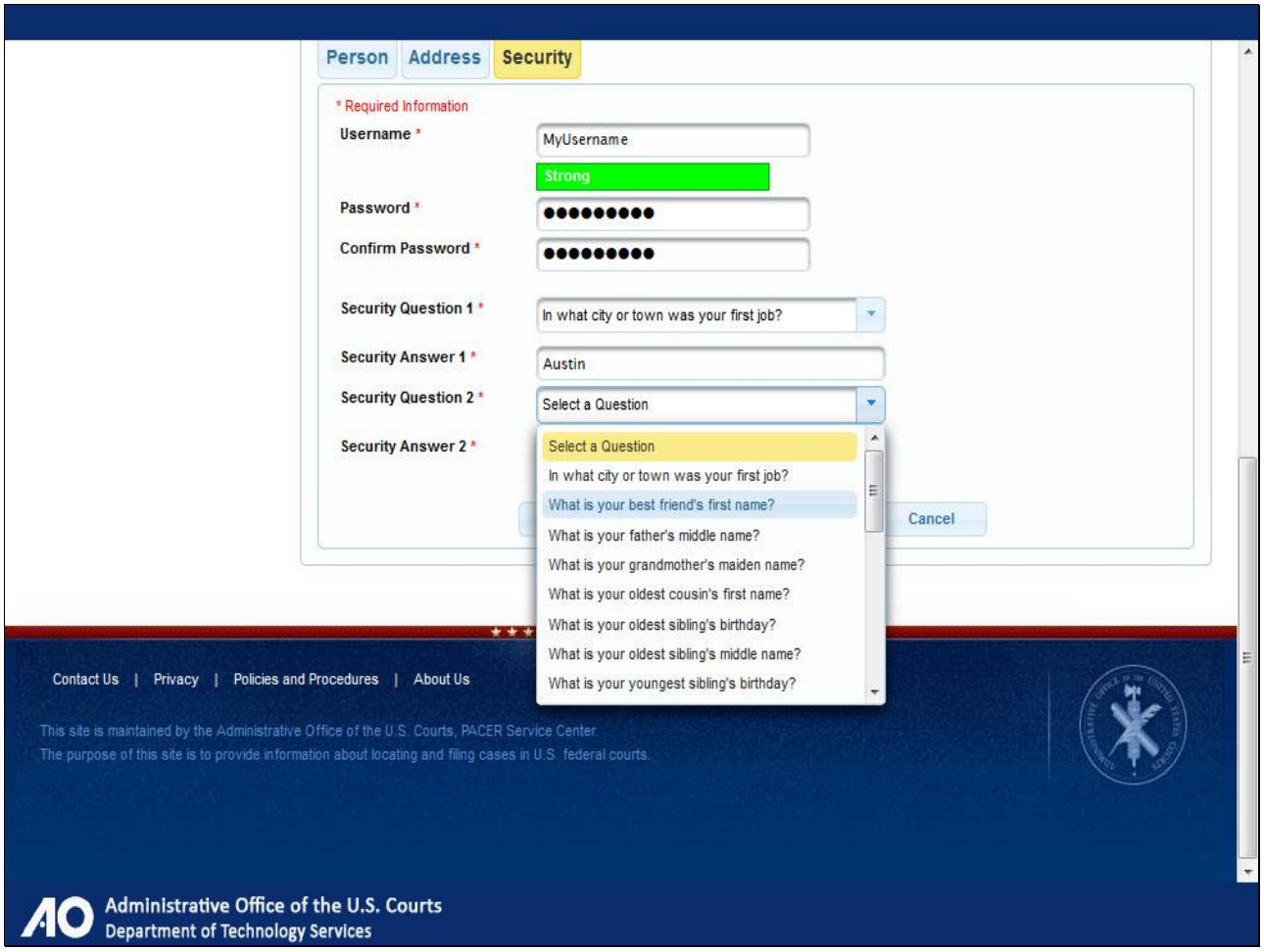
Select a security question.

Slide 27



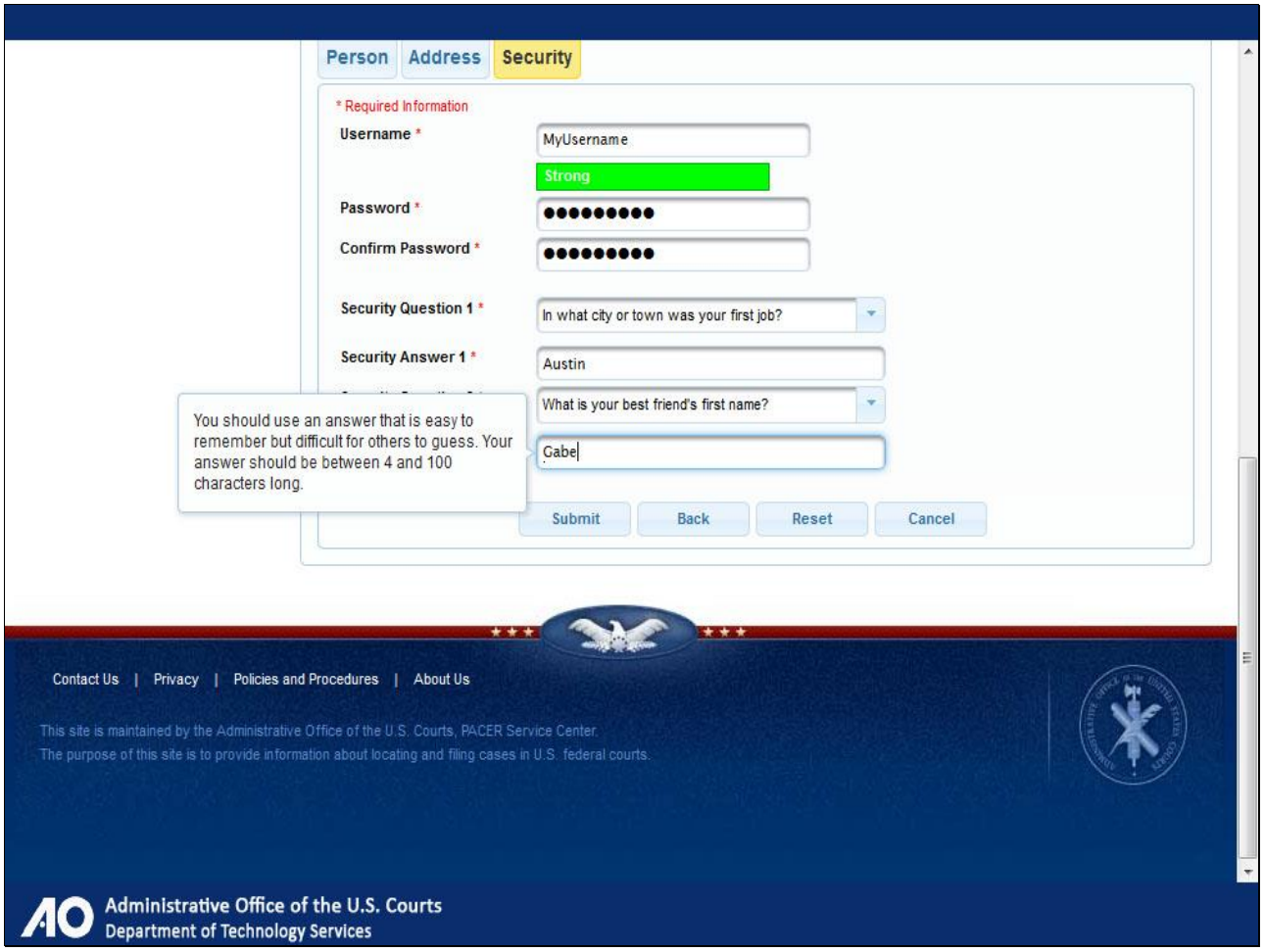
And answer.

Slide 28



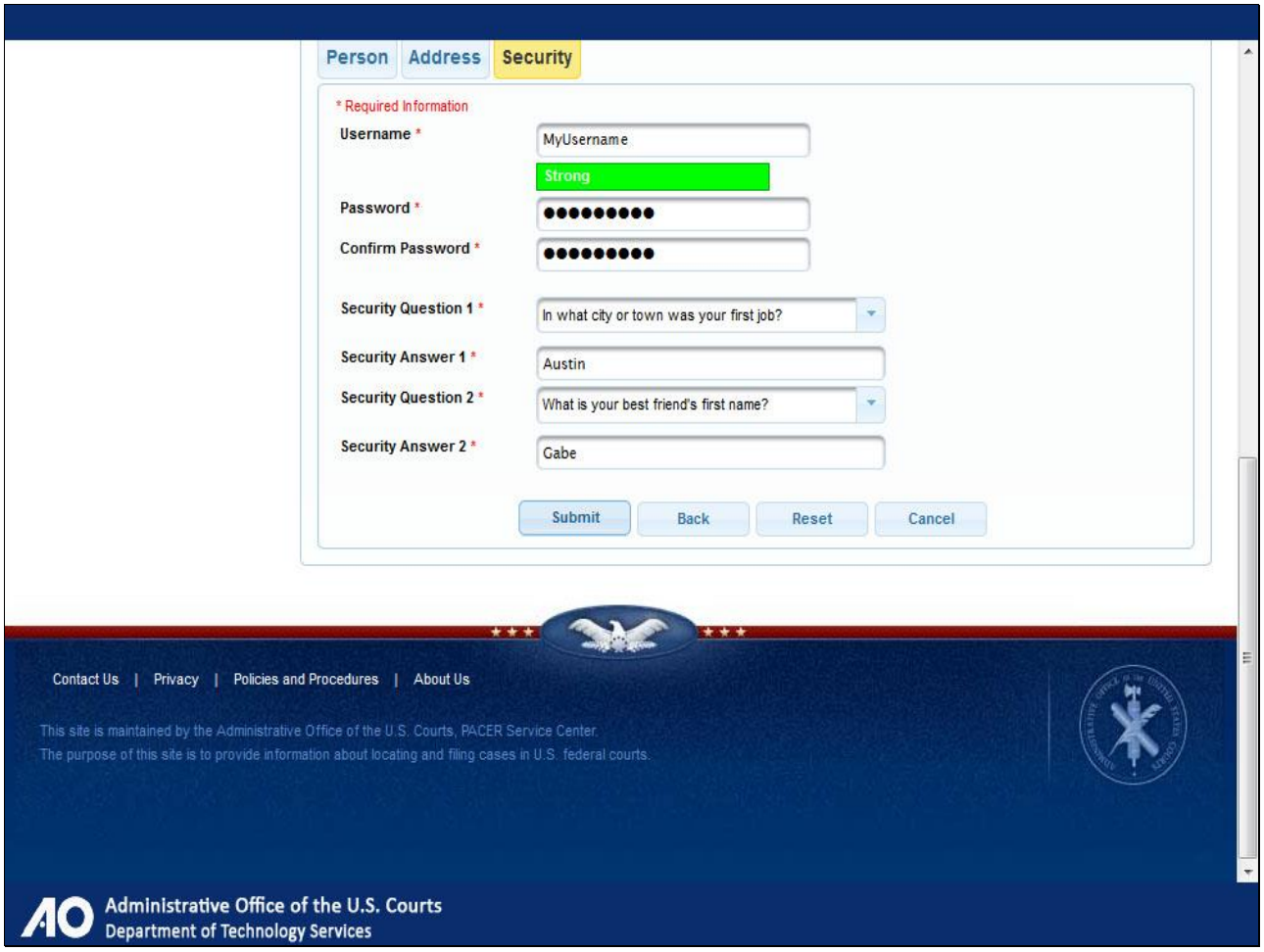
Select a second security question.

Slide 29



And answer.

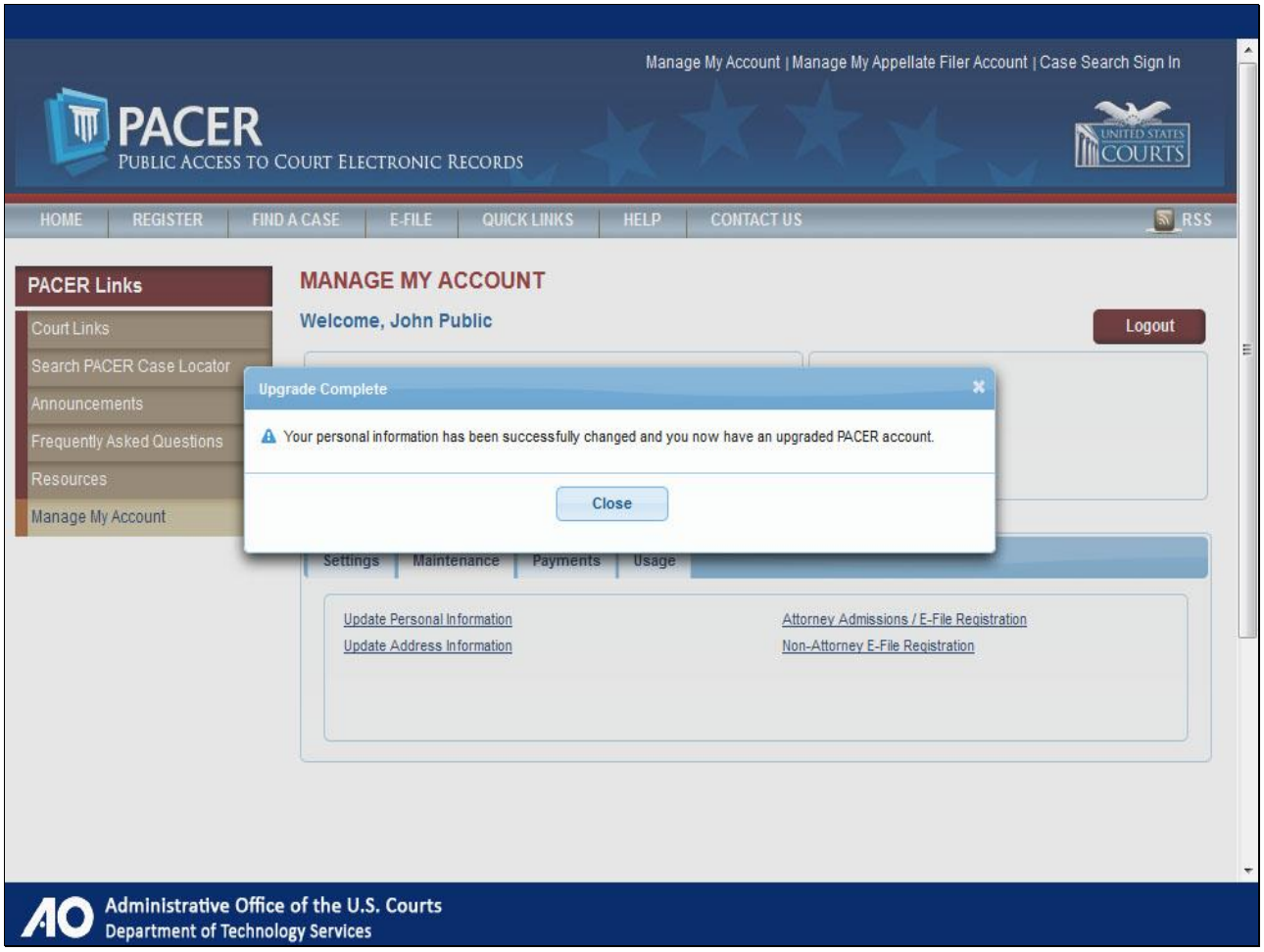
Slide 30



Completing the Security tab information is the final step in upgrading your PACER account. Once you click Submit, the username and password you entered will be your new username and password for PACER and all NextGen courts.

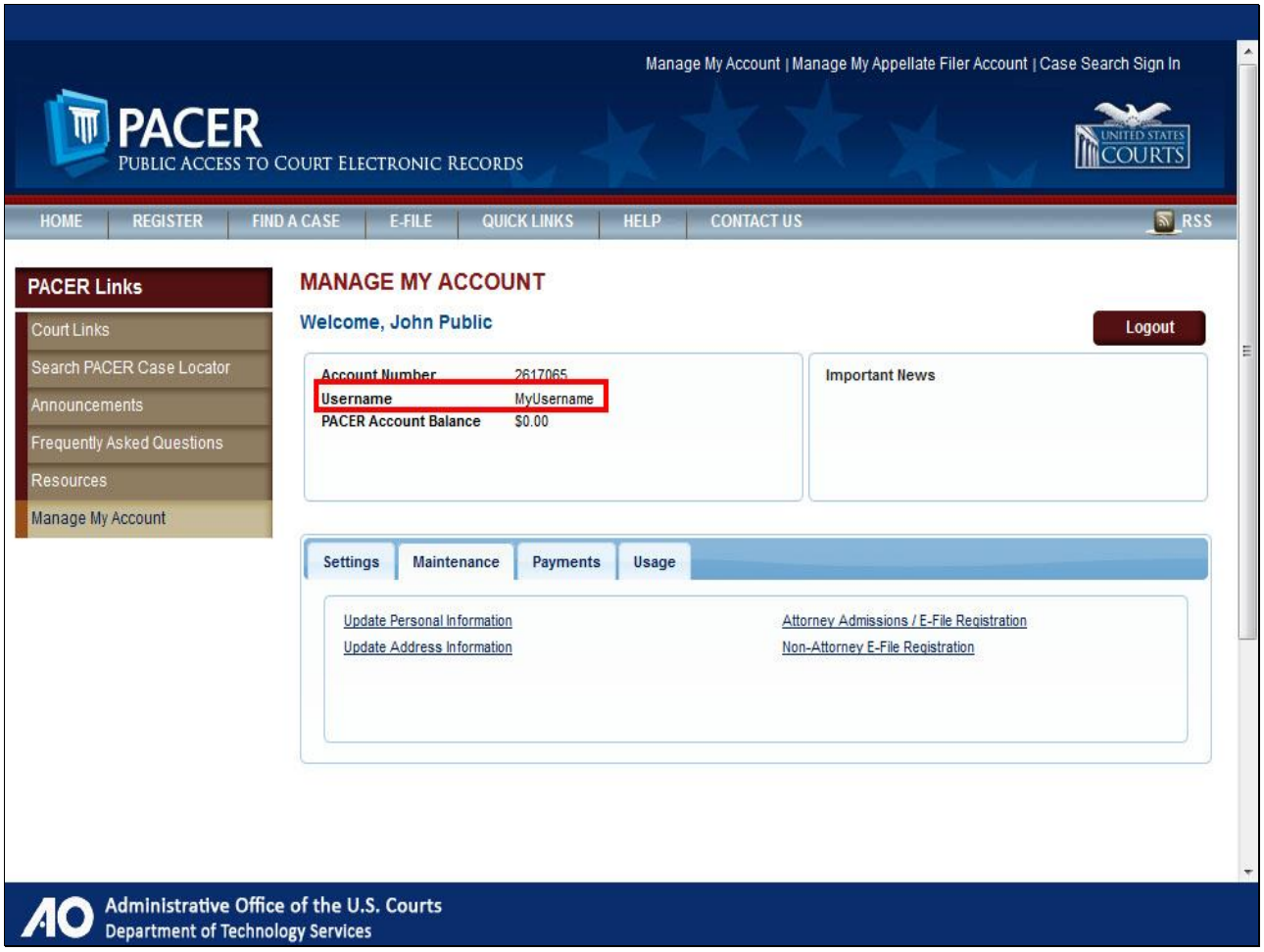
You will no longer be able to use your old PACER username and password. Click Submit.

Slide 31



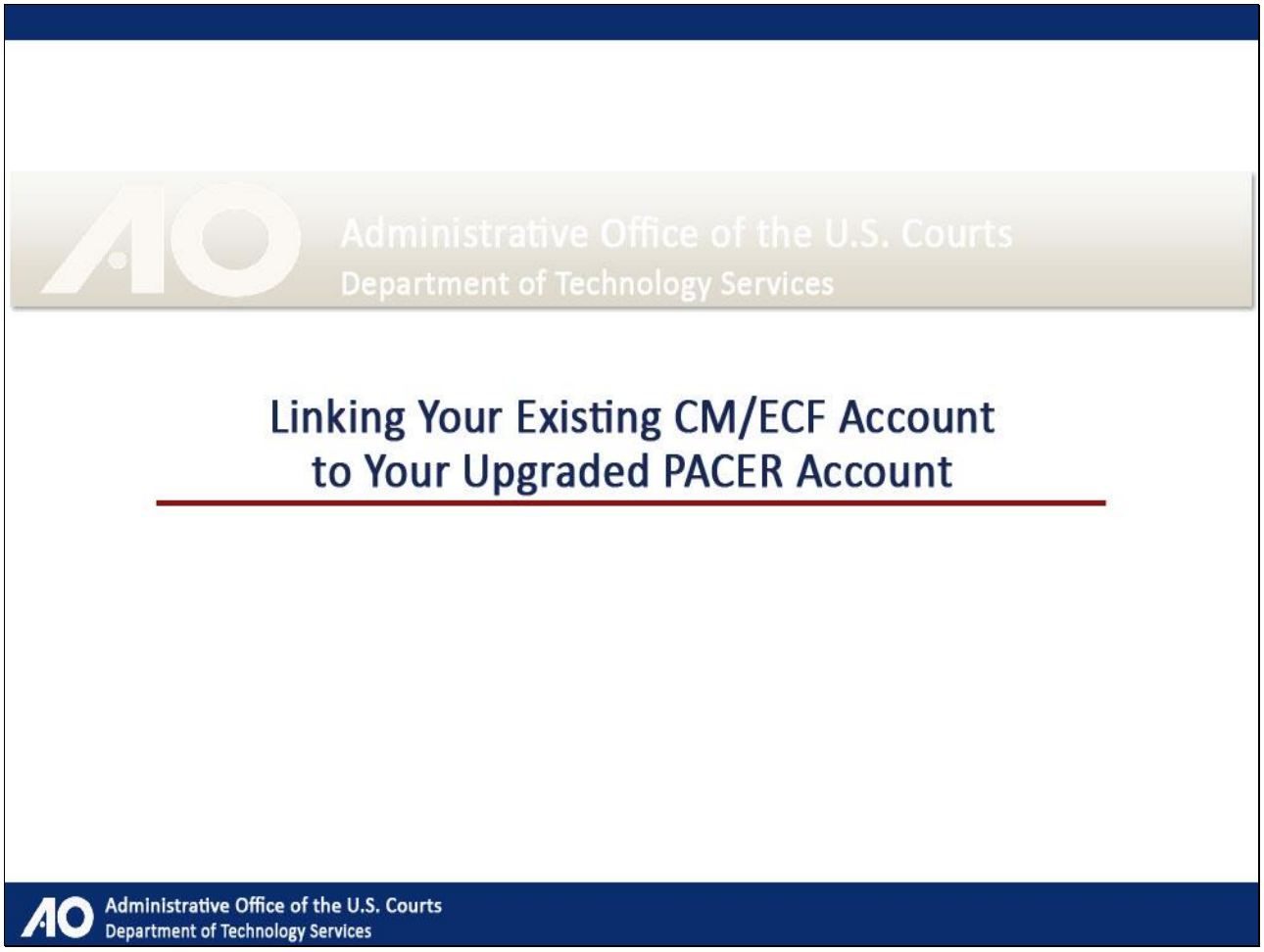
You will see a window confirming that your account has been upgraded and that your current username and password are no longer valid.

Slide 32

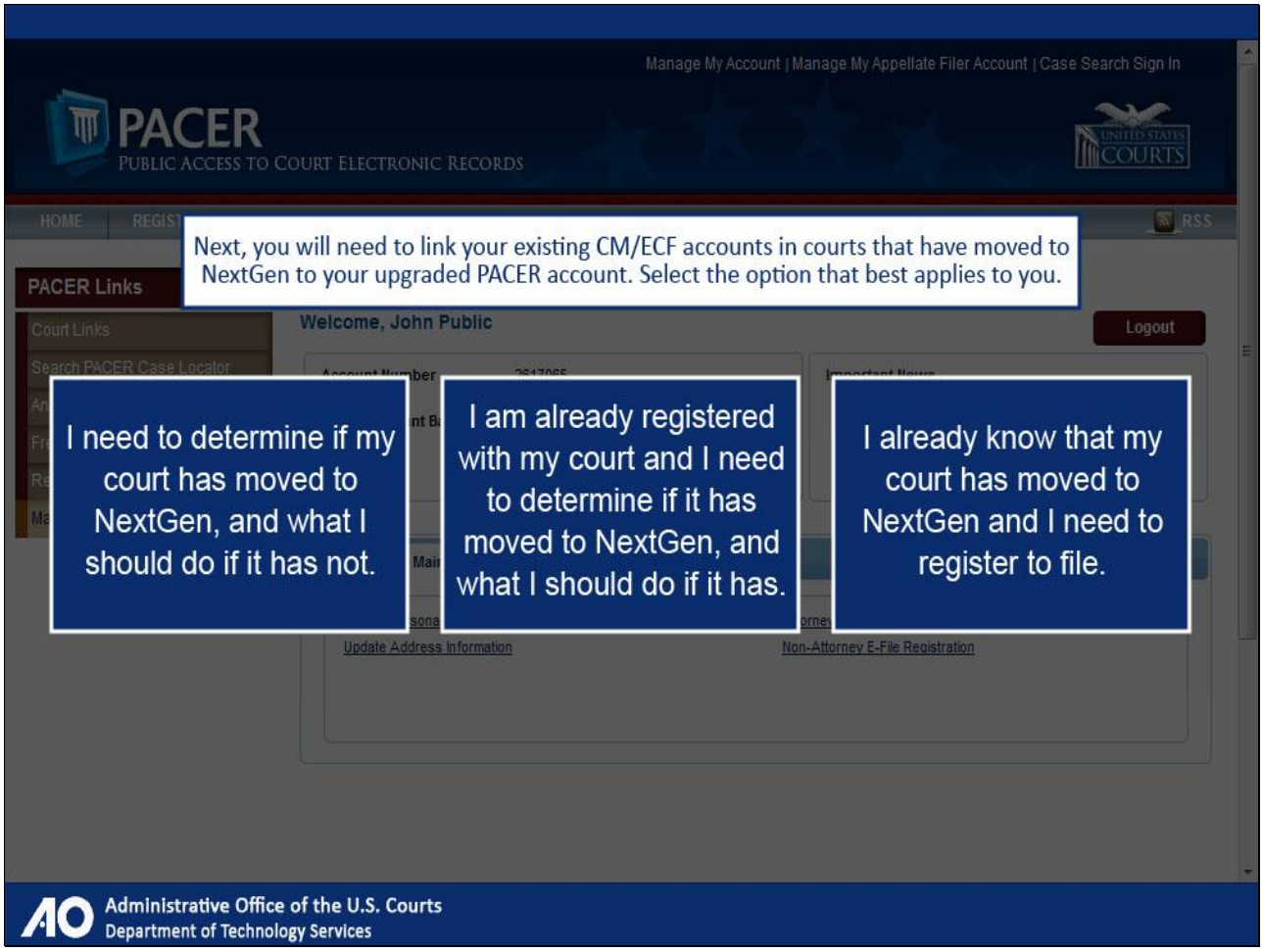


On the Manage My Account page, notice that your username is now the new one that you created.

Slide 33 - Linking CM/ECF



Slide 34



Next, you will need to link your existing CM/ECF accounts in courts that have moved to NextGen to your upgraded PACER account. From the menu of options, select the option that best applies to you.

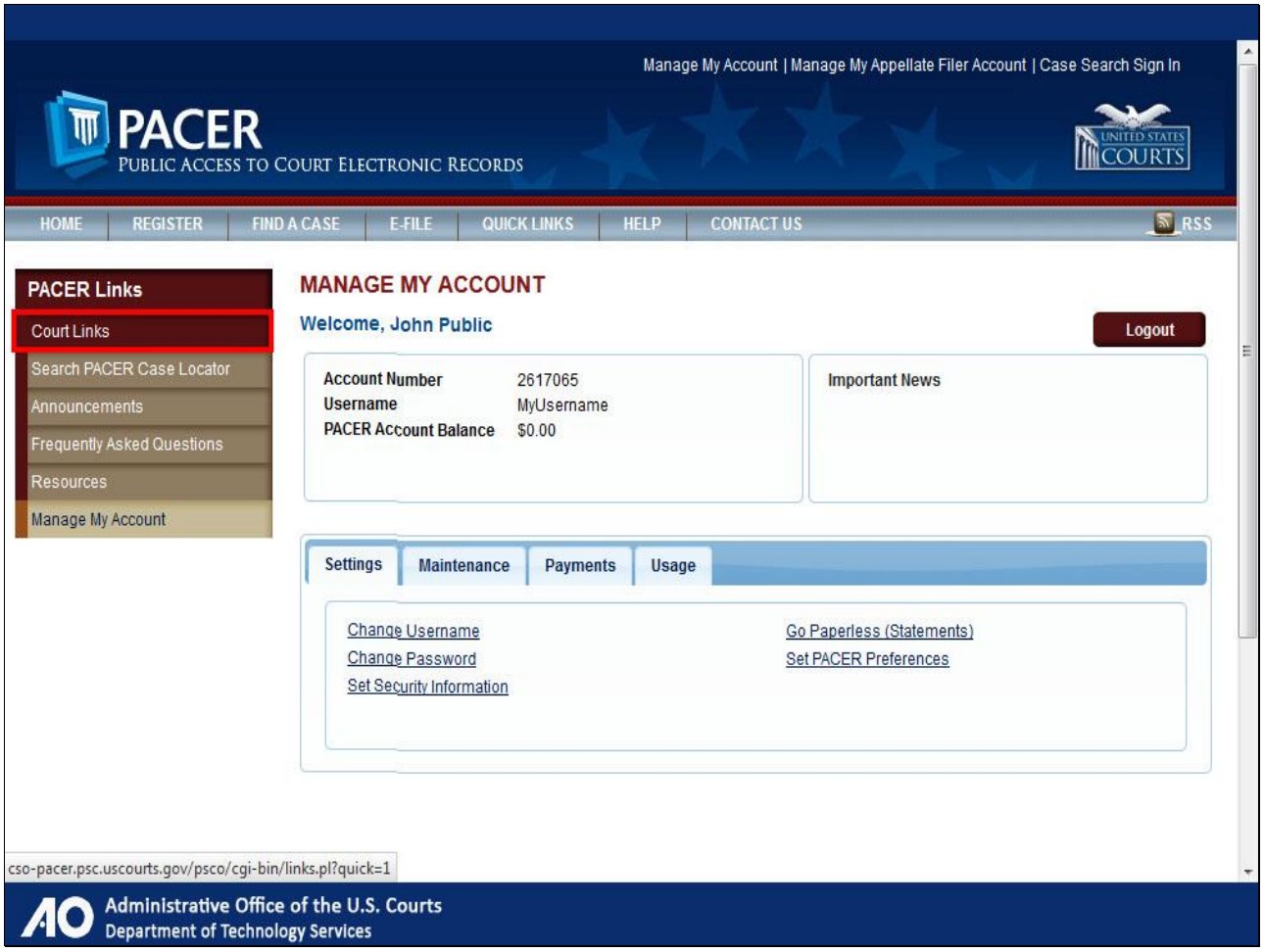
Note to student:

The **left option** should take you to slide 35.

The **middle option** should take you to slide 38.

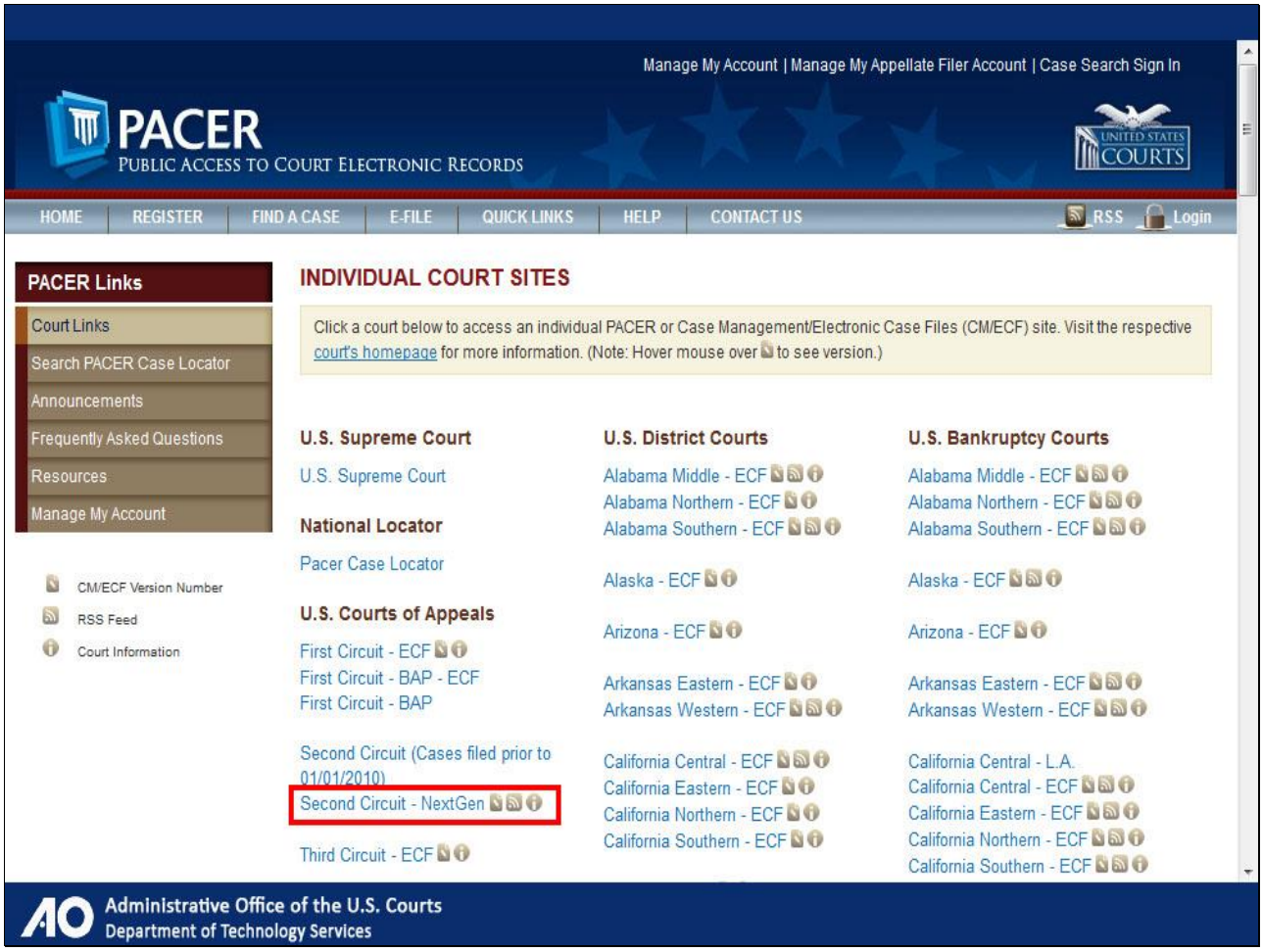
The **right option** should take you to slide 53.

Slide 35



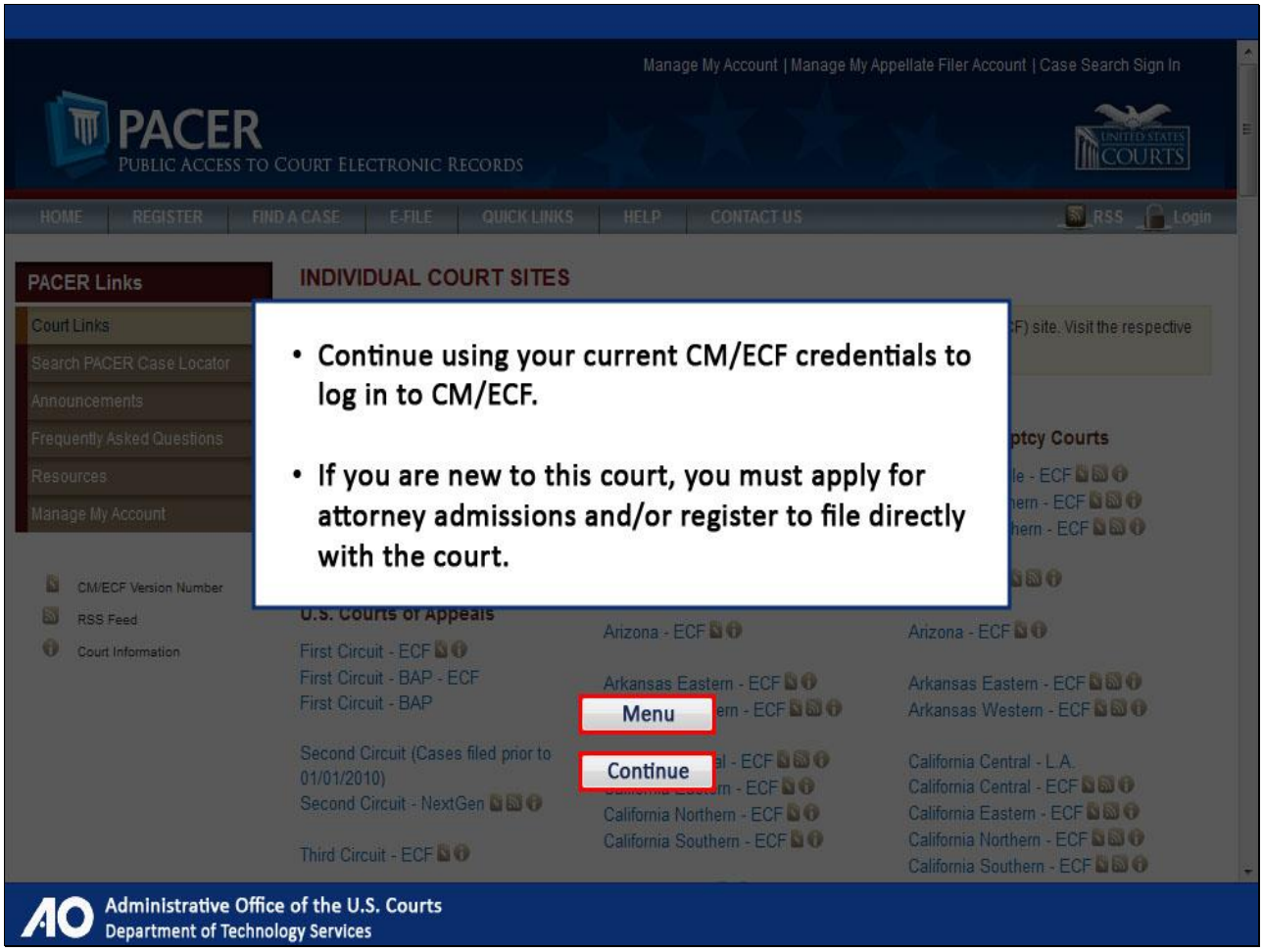
To see if your court has moved to NextGen, you can visit the Court Links page and select your court or go to your court's CM/ECF webpage via your browser. In this example, we will use the Court Links page.

Slide 36



Courts that have moved to NextGen will be clearly marked on the Court Links page. If a court is not labeled in this manner, it has not moved to NextGen.

Slide 37



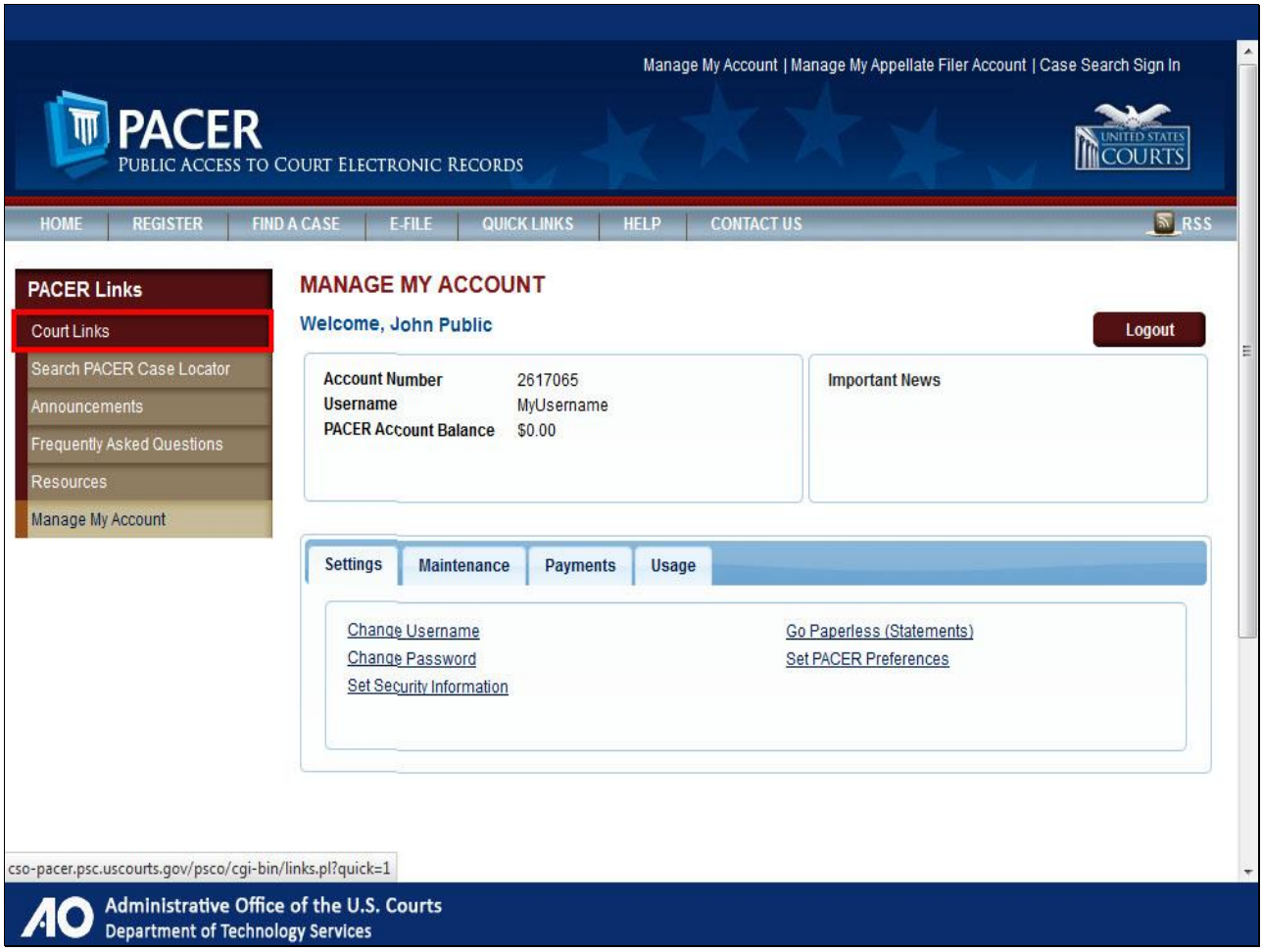
If your court has not yet moved to NextGen, you will continue to use your current CM/ECF credentials to log in to CM/ECF. If you are new to this court, you must apply for attorney admissions and/or register to file directly with the court, as well as pay any applicable fees, following local rules and procedures. Click Menu to return to the menu options, or click Continue to complete this module.

Note to student:

The “Menu” button would take you back to slide 34.

The “Continue” button would take you to slide 89.

Slide 38



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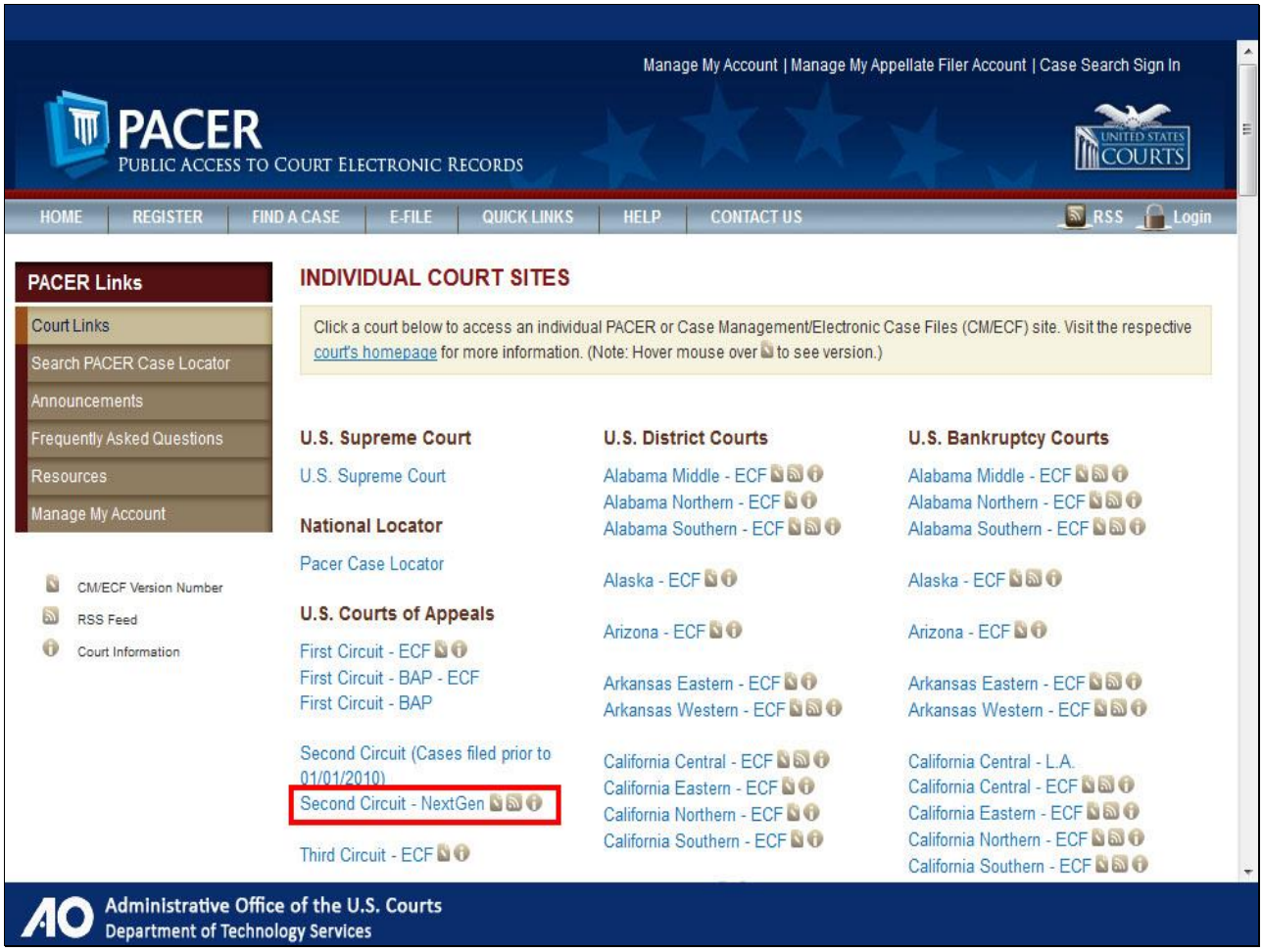
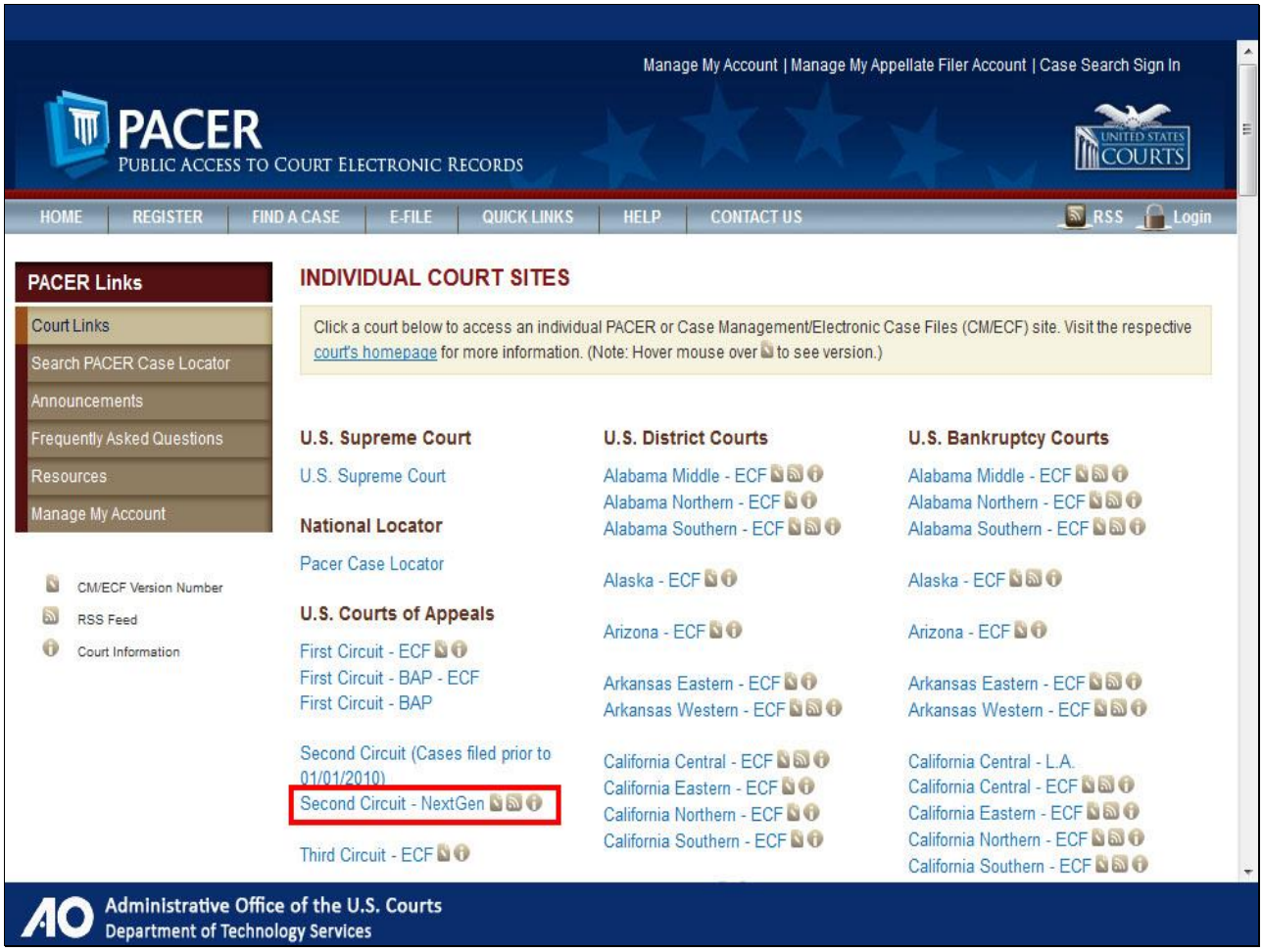
To see if your court has moved to NextGen, you can visit the Court Links page and select your court or go to your court's CM/ECF webpage via your browser. In this example, we will use the Court Links page.

Slide 39



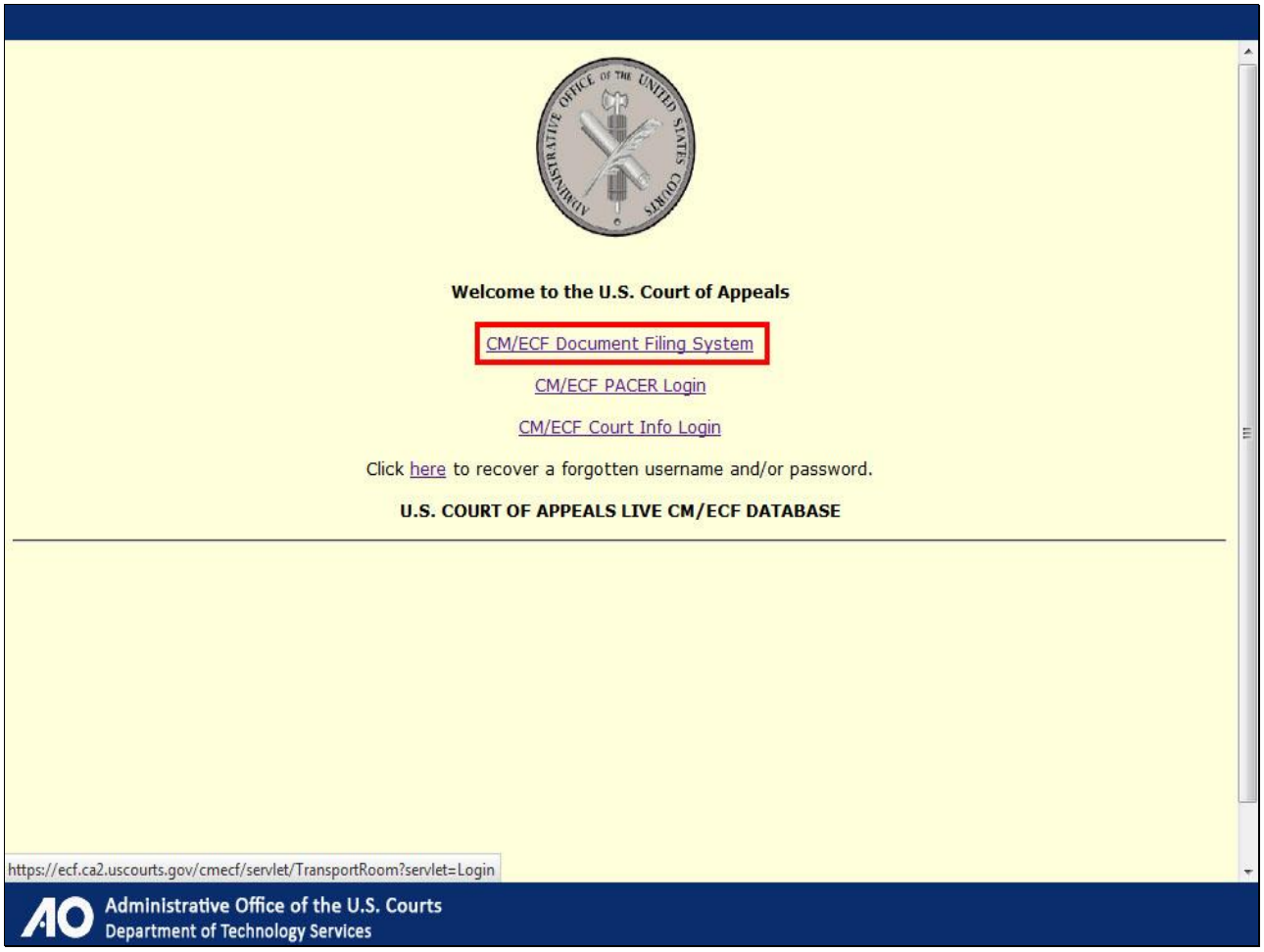
Courts that have moved to NextGen will be clearly marked on the Court Links page. If a court is not labeled in this manner, it has not moved to NextGen.

Slide 40



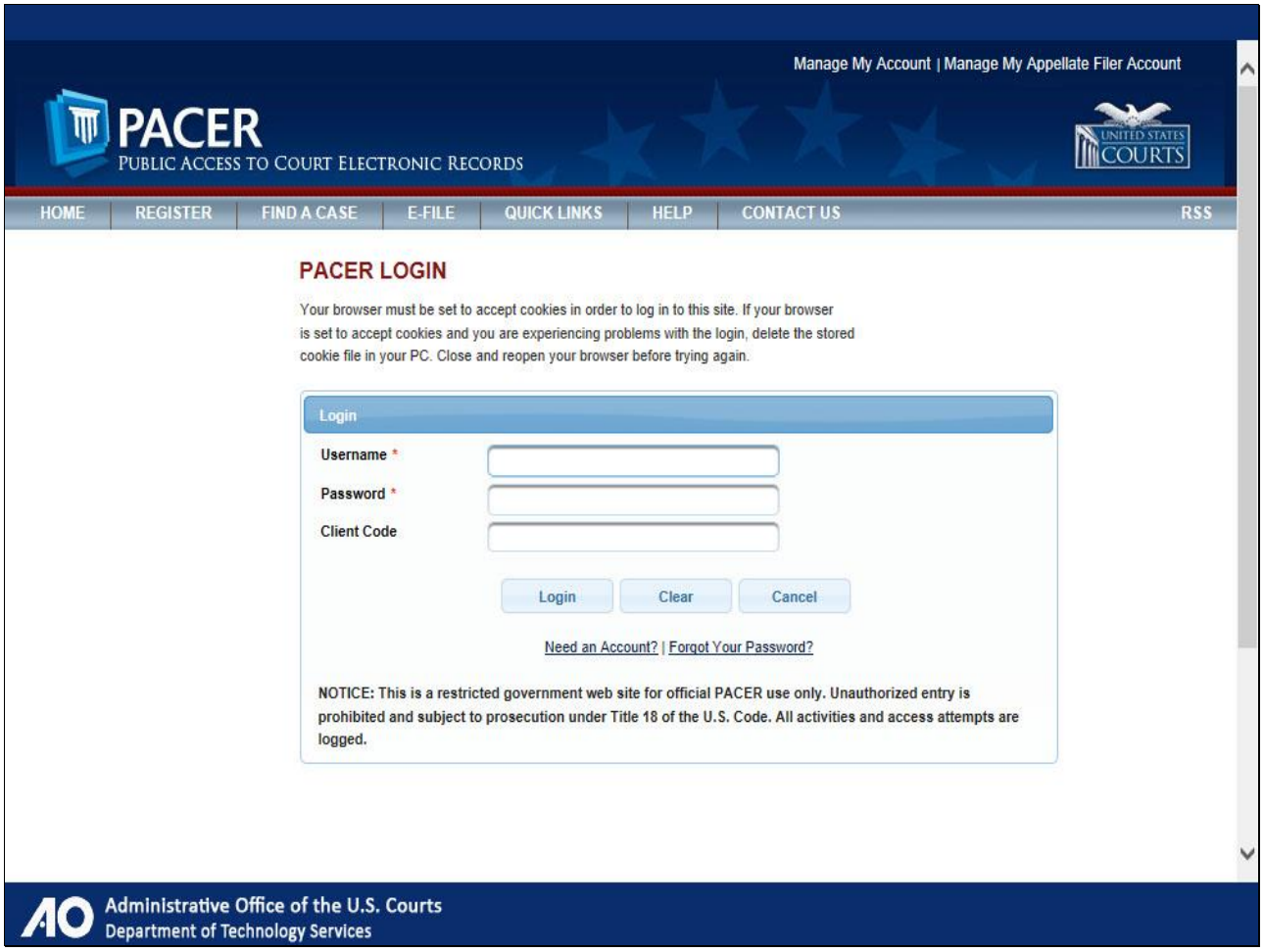
For the purpose of this demonstration, your court is the Second Circuit Court of Appeals, which has upgraded to NextGen. Click the Second Circuit Court of Appeals.

Slide 41



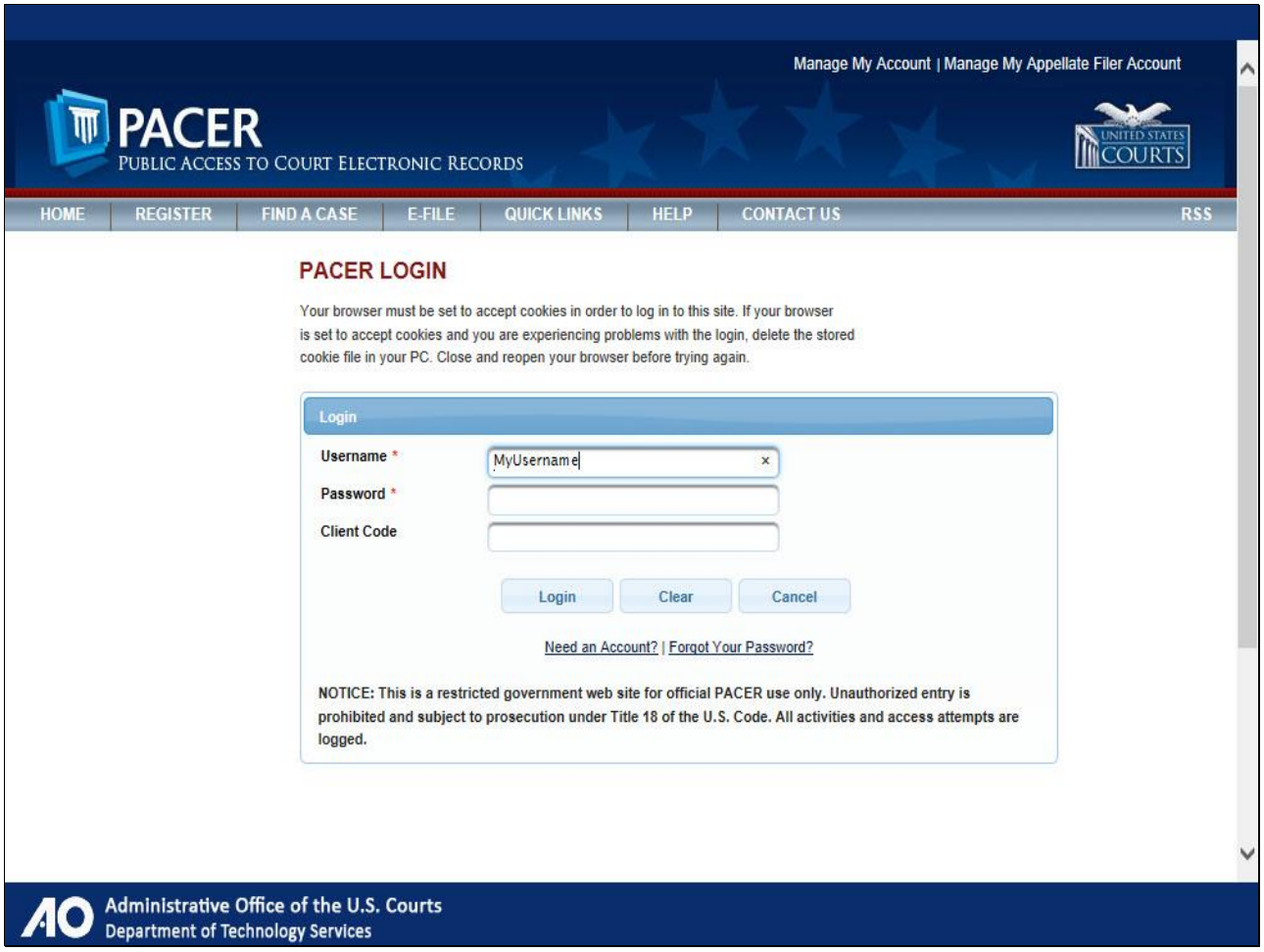
The screen you are seeing now is a splash screen used by the U.S. Court of Appeals. Other courts may not display this type of page. Click CM/ECF Document Filing System.

Slide 42



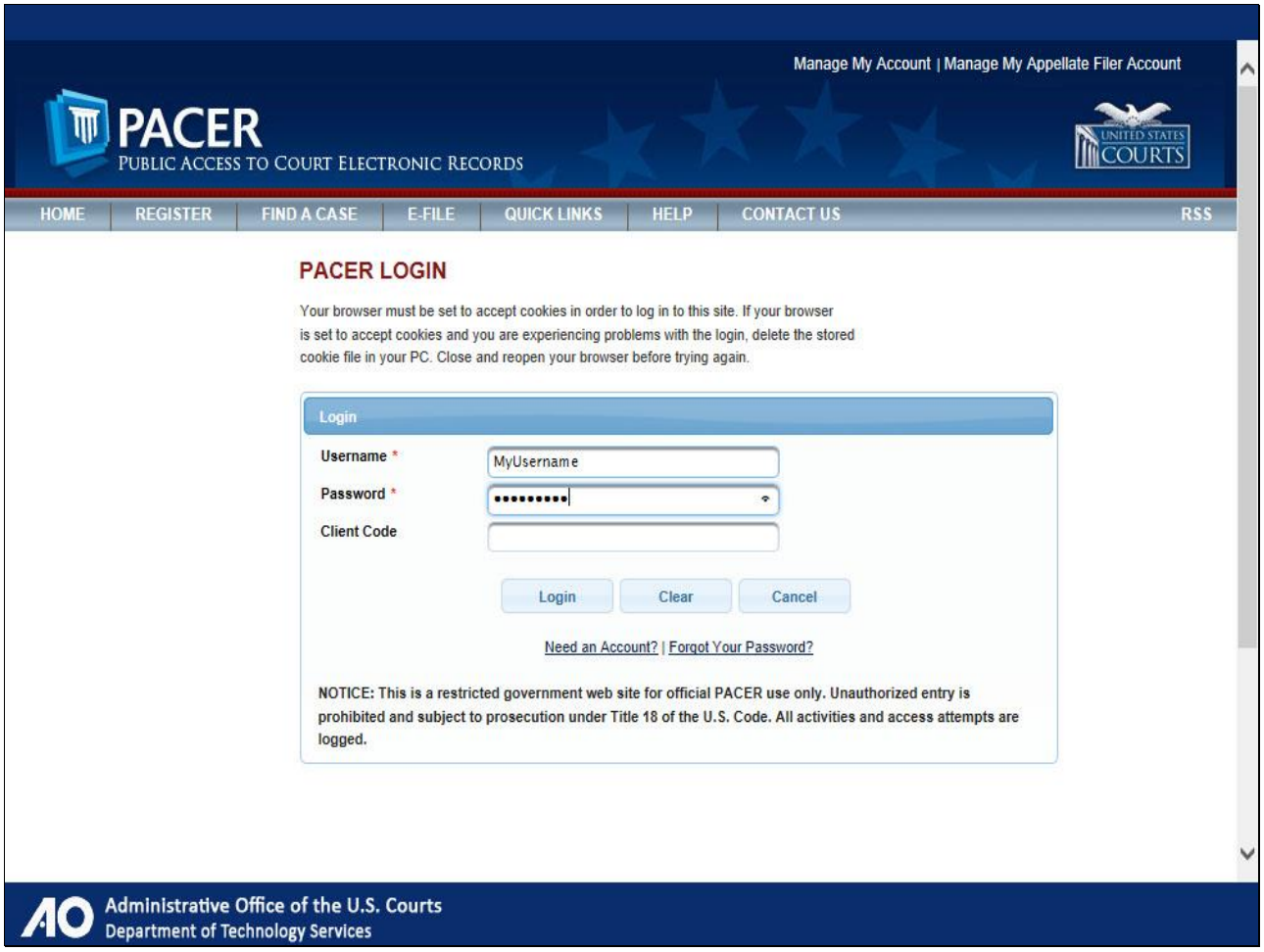
You have been directed to the court's new central login screen. Log in with your new PACER username and password.

Slide 43



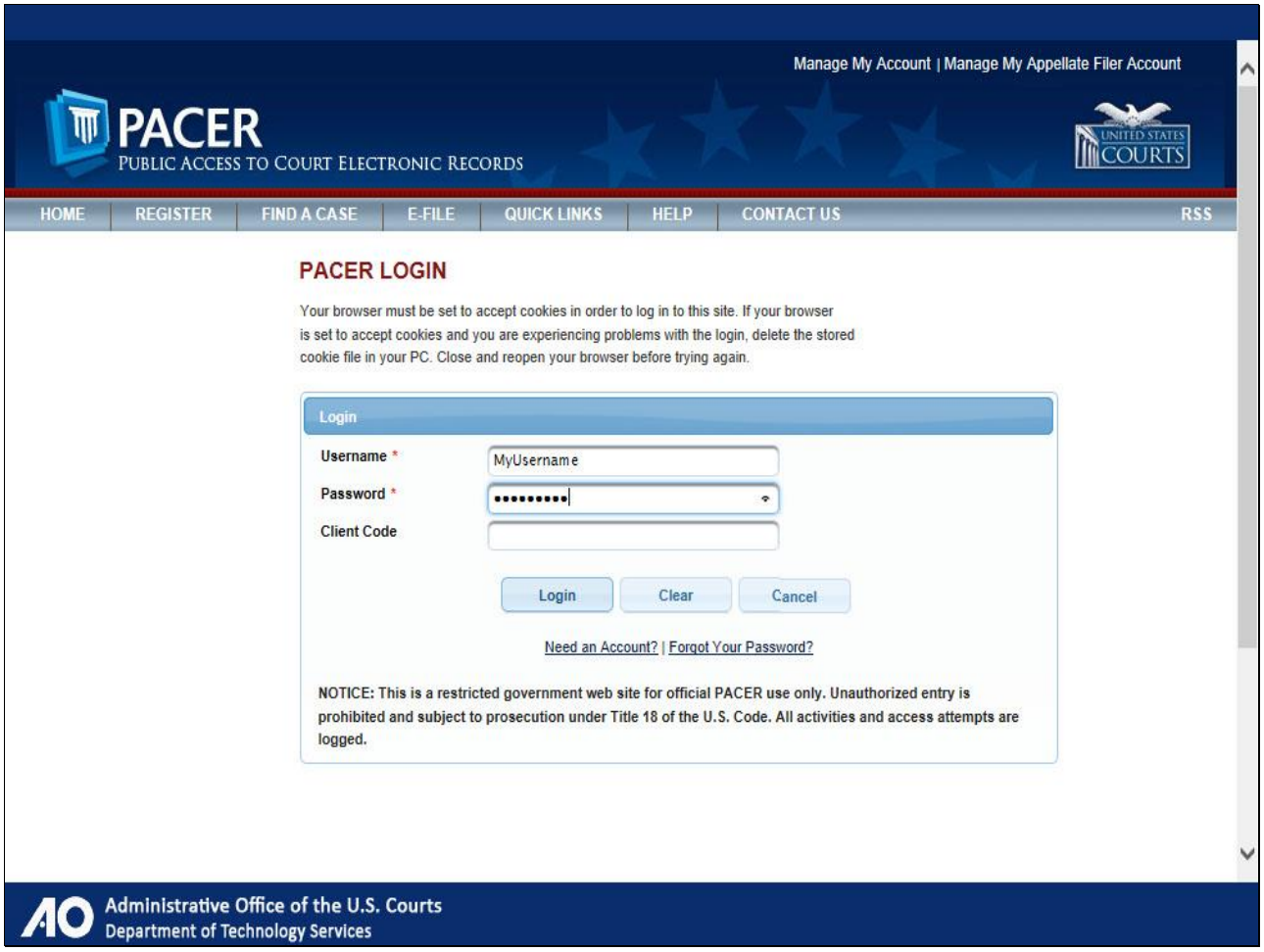
Provide username.

Slide 44



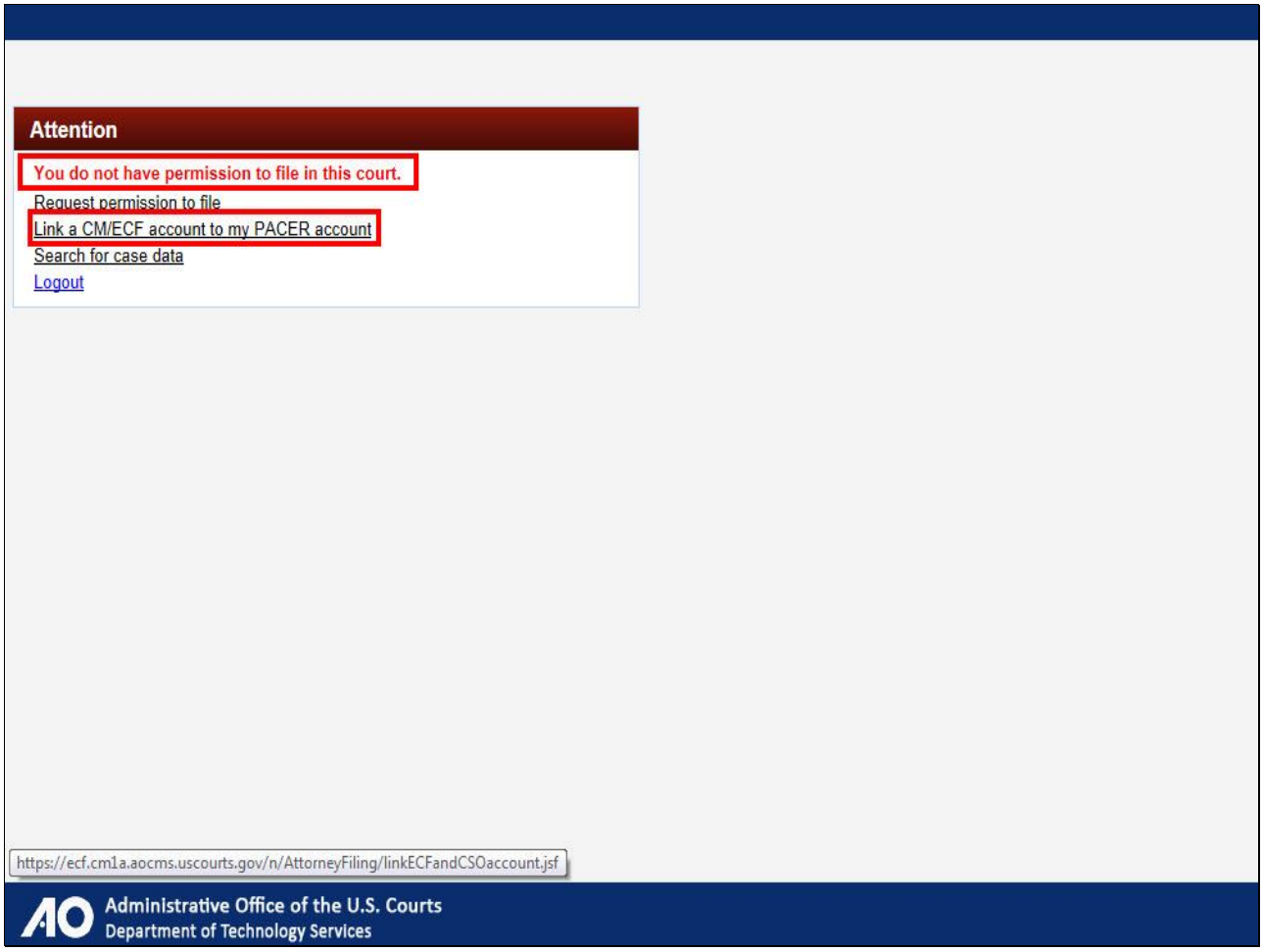
Provide password.

Slide 45



Click Login.

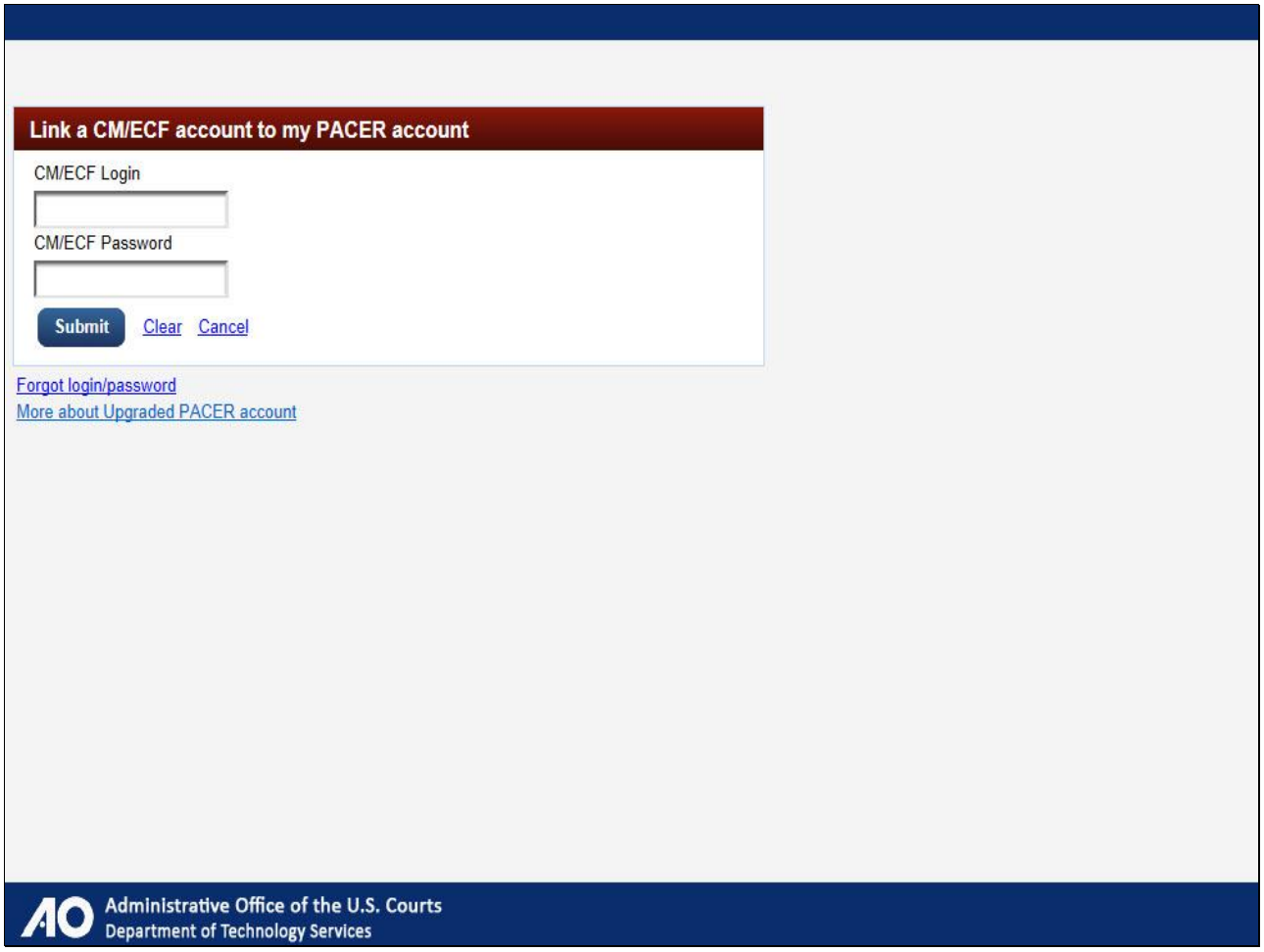
Slide 46



Once you have logged in to your upgraded PACER account, the next step is to link your existing CM/ECF filing account for this court to your upgraded PACER account by clicking the corresponding link.

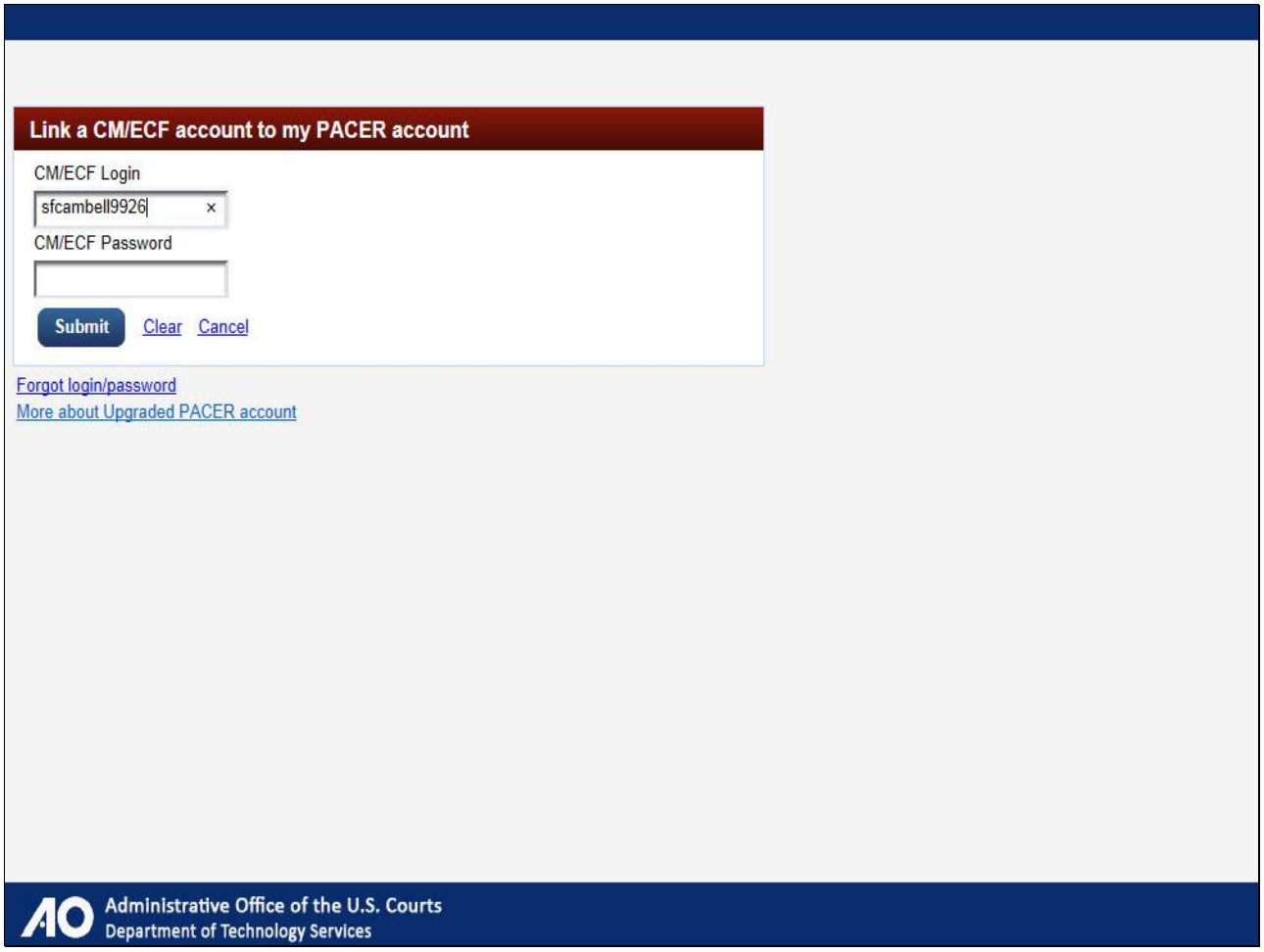
Note that the message at the top of the screen that says, "You do not have permission to file in this court" will not be displayed again for this court once you have completed linking your CM/ECF and PACER accounts.

Slide 47



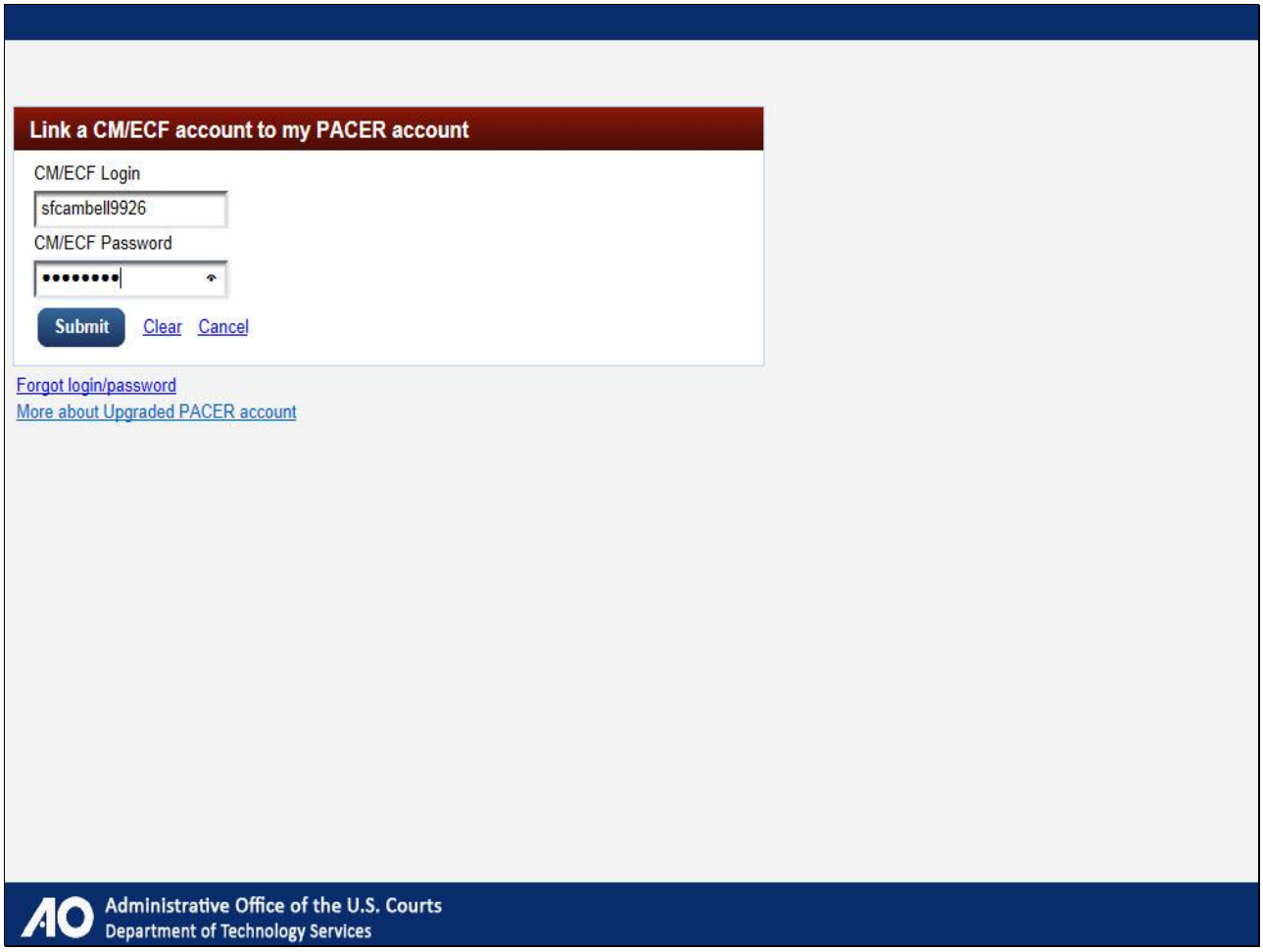
Next, enter your existing CM/ECF username and password in order to link your CM/ECF account to your upgraded PACER account.

Slide 48



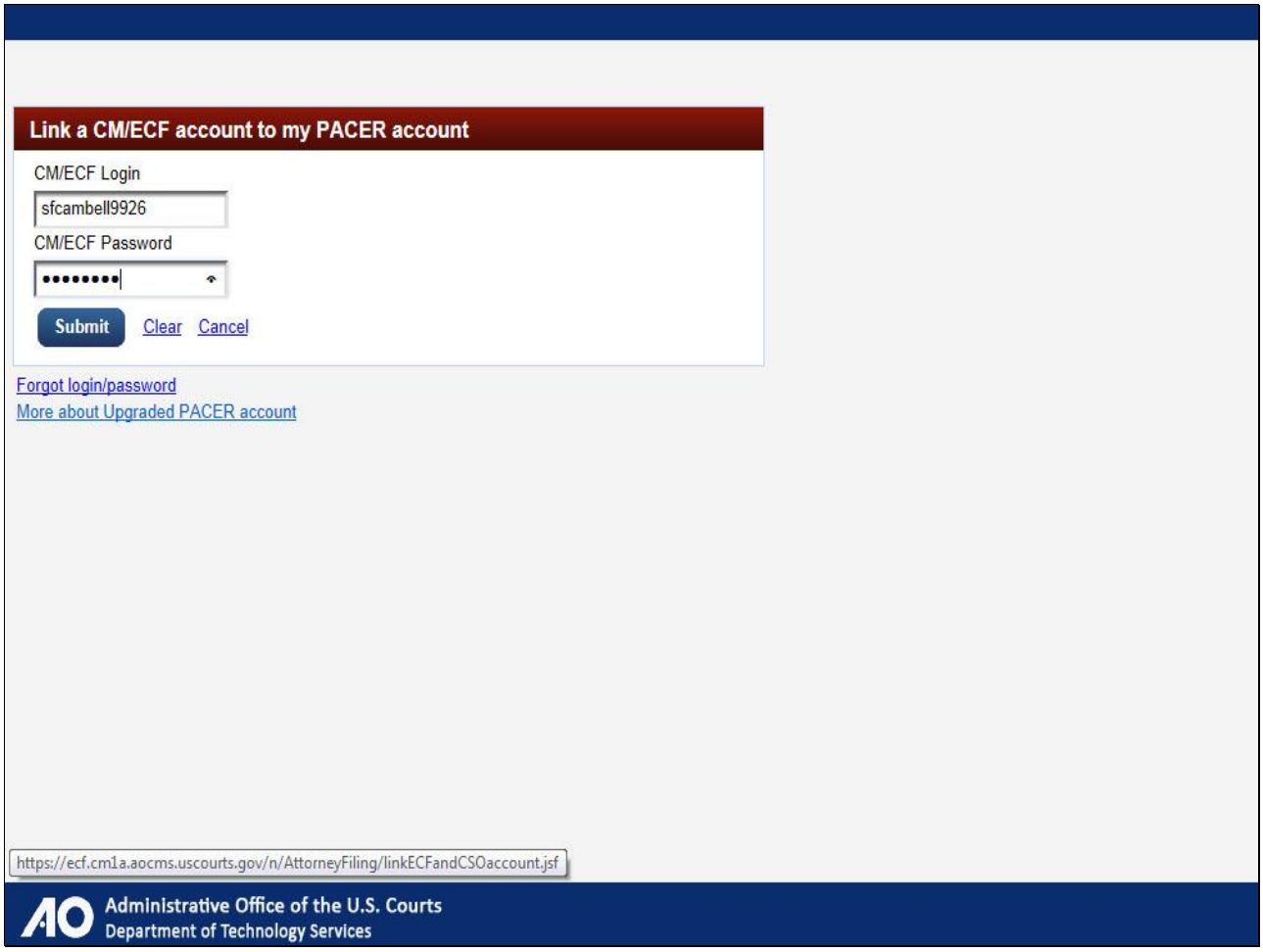
Provide CM/ECF username.

Slide 49



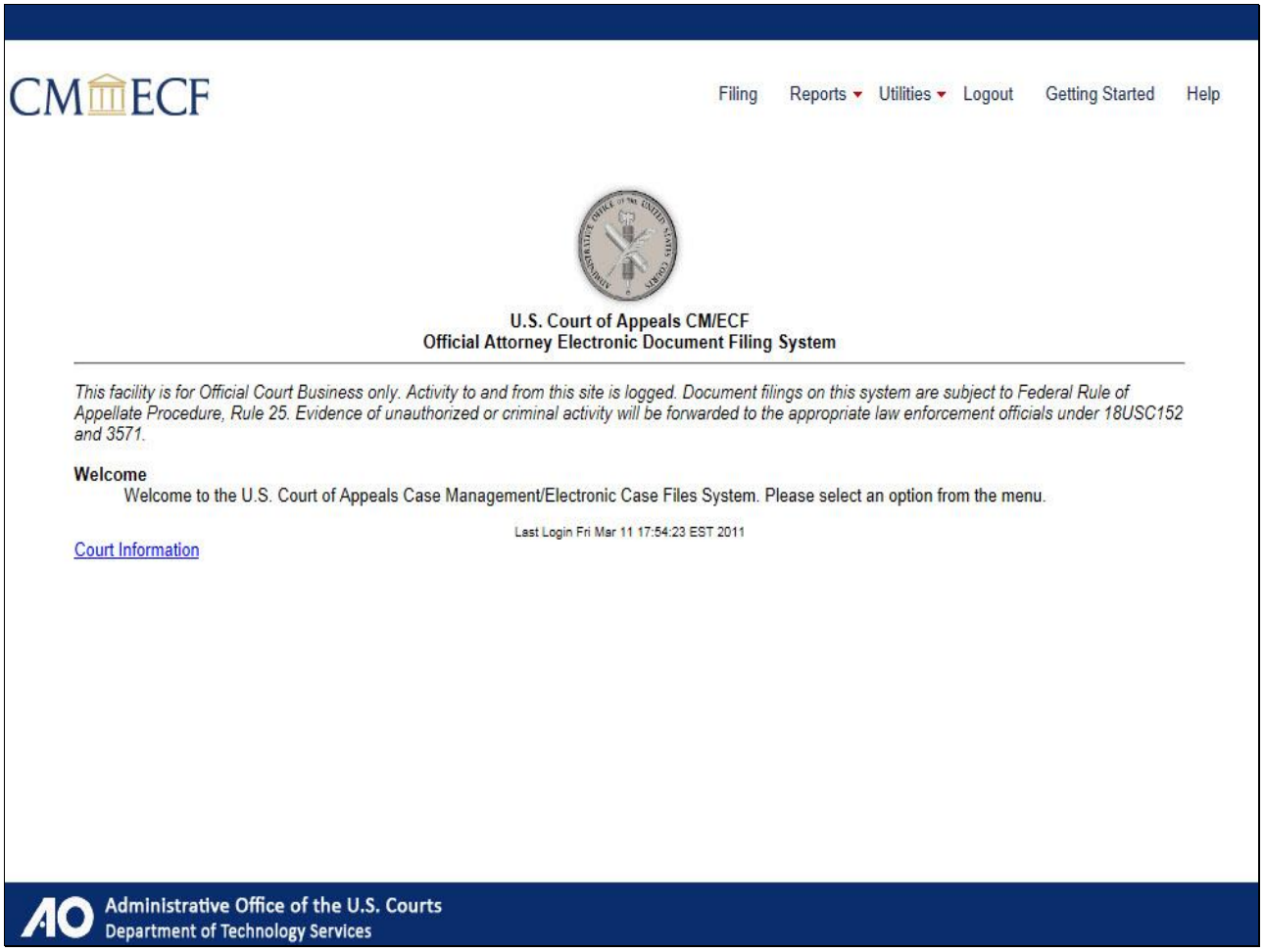
Provide password.

Slide 50



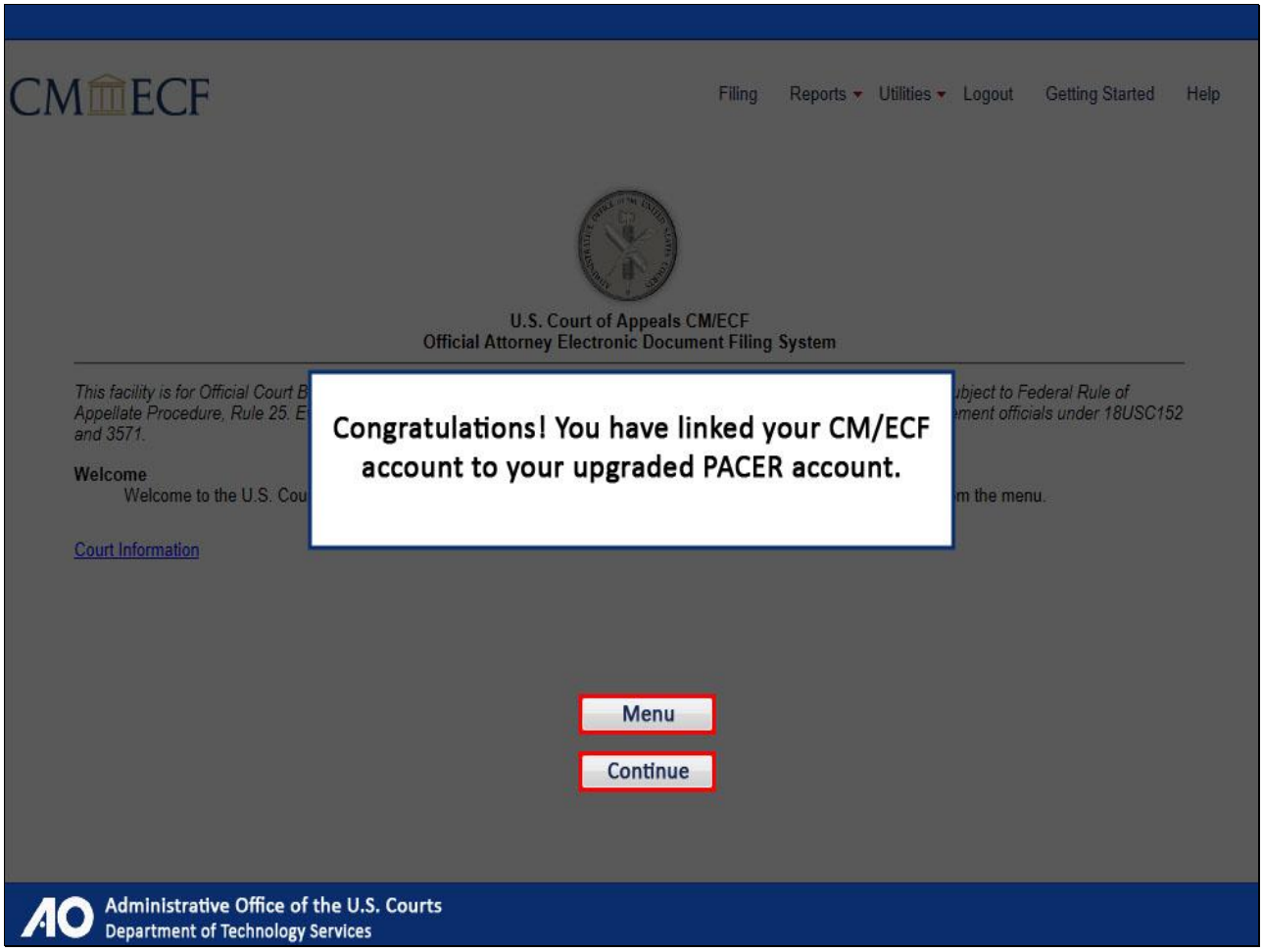
Click Submit.

Slide 51



You will know you have linked your accounts when you arrive at the Official Attorney Electronic Document Filing System page for your court.

Slide 52



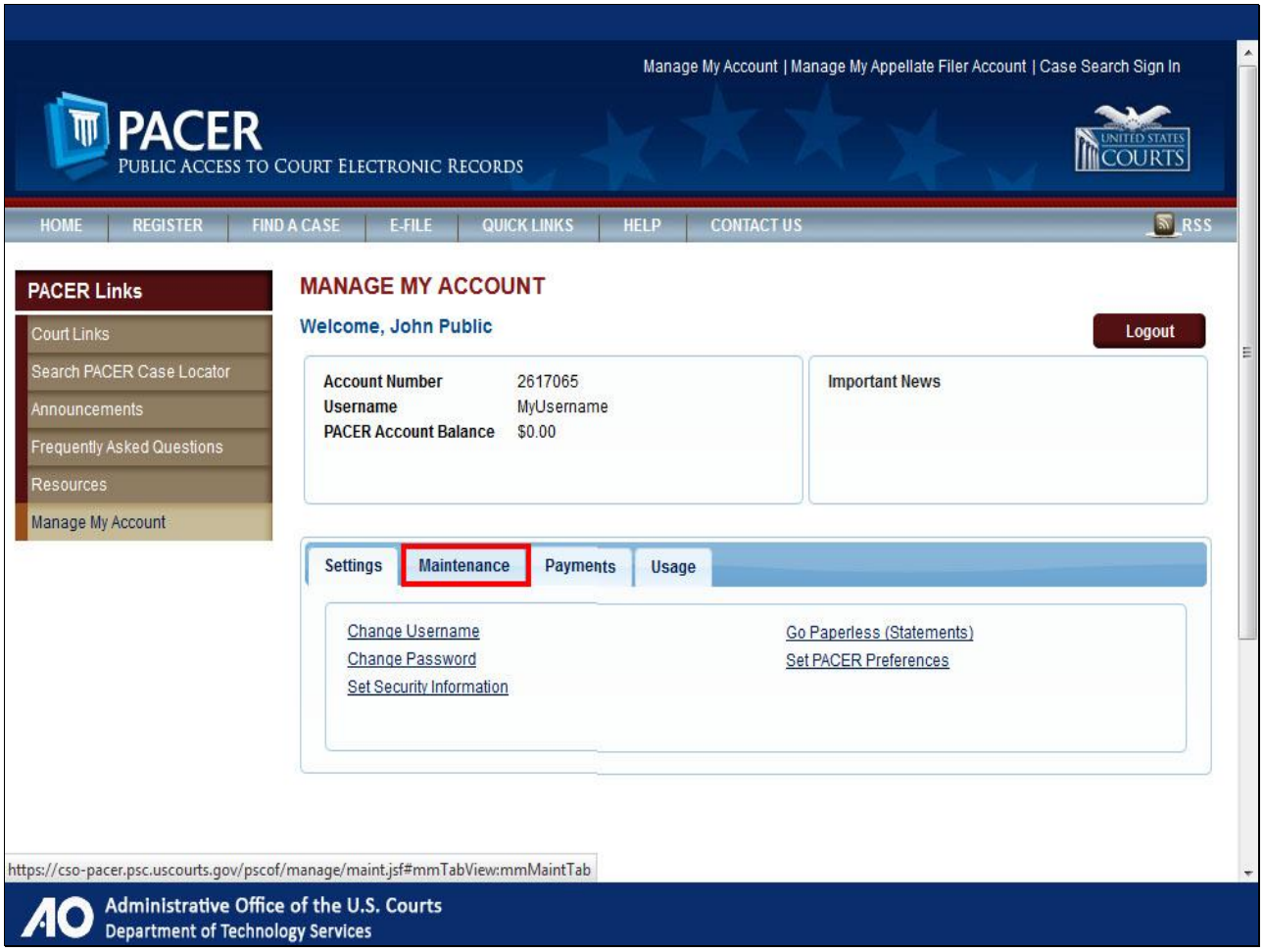
Congratulations! You have successfully linked your CM/ECF account to your upgraded PACER account! If you need to link your upgraded PACER login to additional NextGen courts, follow the steps we just completed by navigating to the NextGen court. Click Menu to return to the menu options, or click Continue to complete this module.

Note to student:

The “Menu” button would take you back to slide 34.

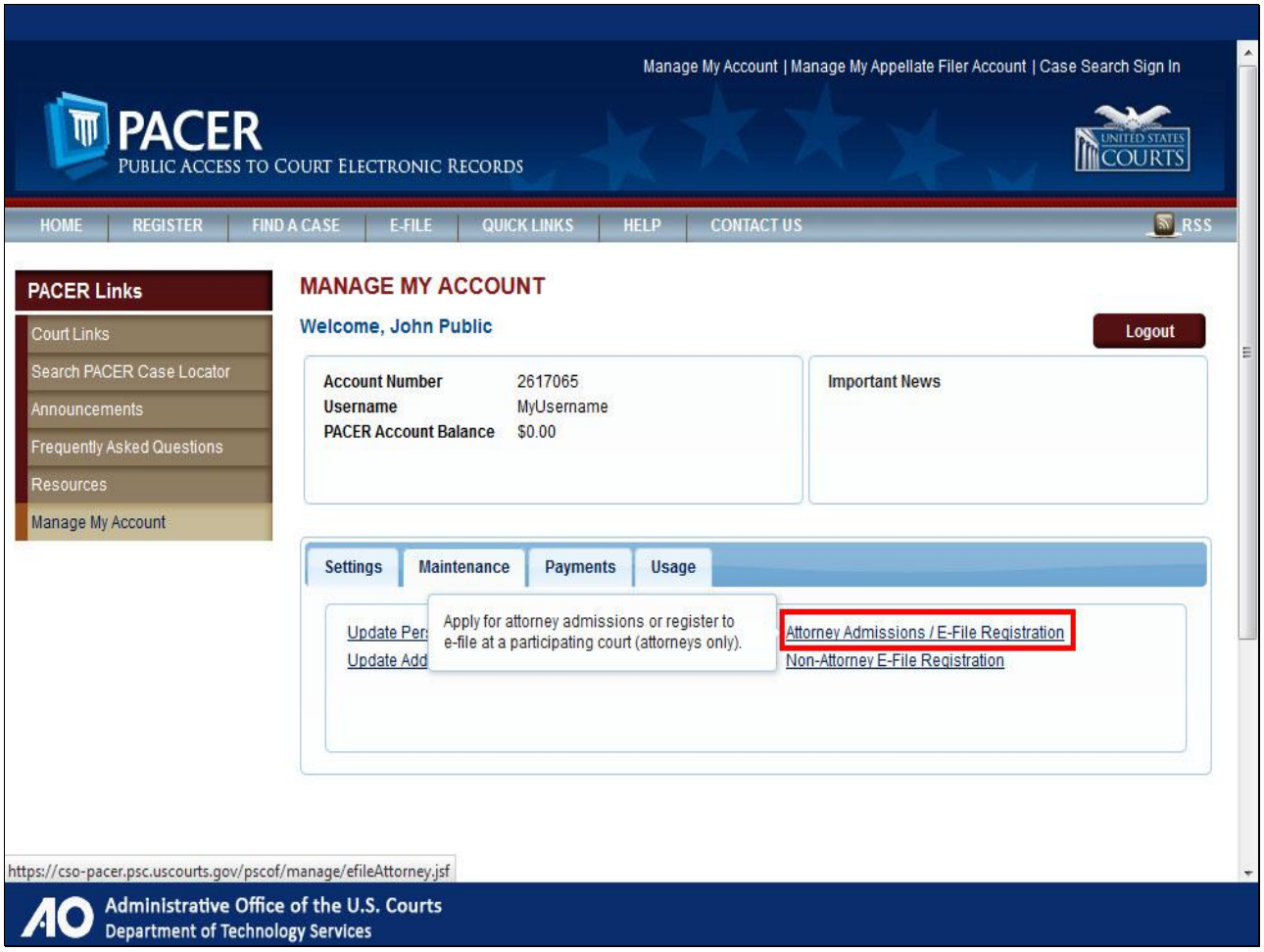
The “Continue” button would take you to slide 89.

Slide 53



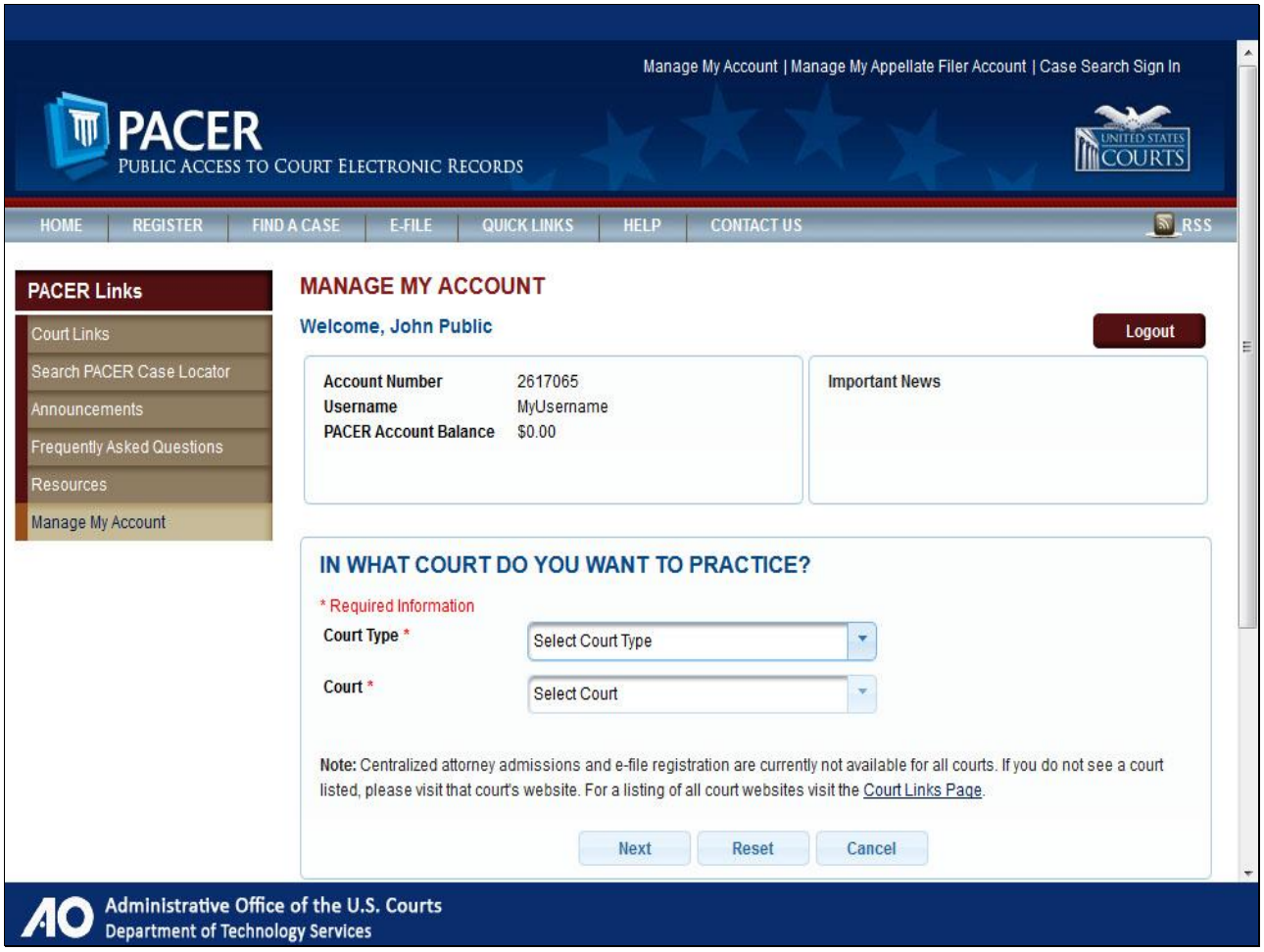
To register to file, begin by clicking the Maintenance tab.

Slide 54



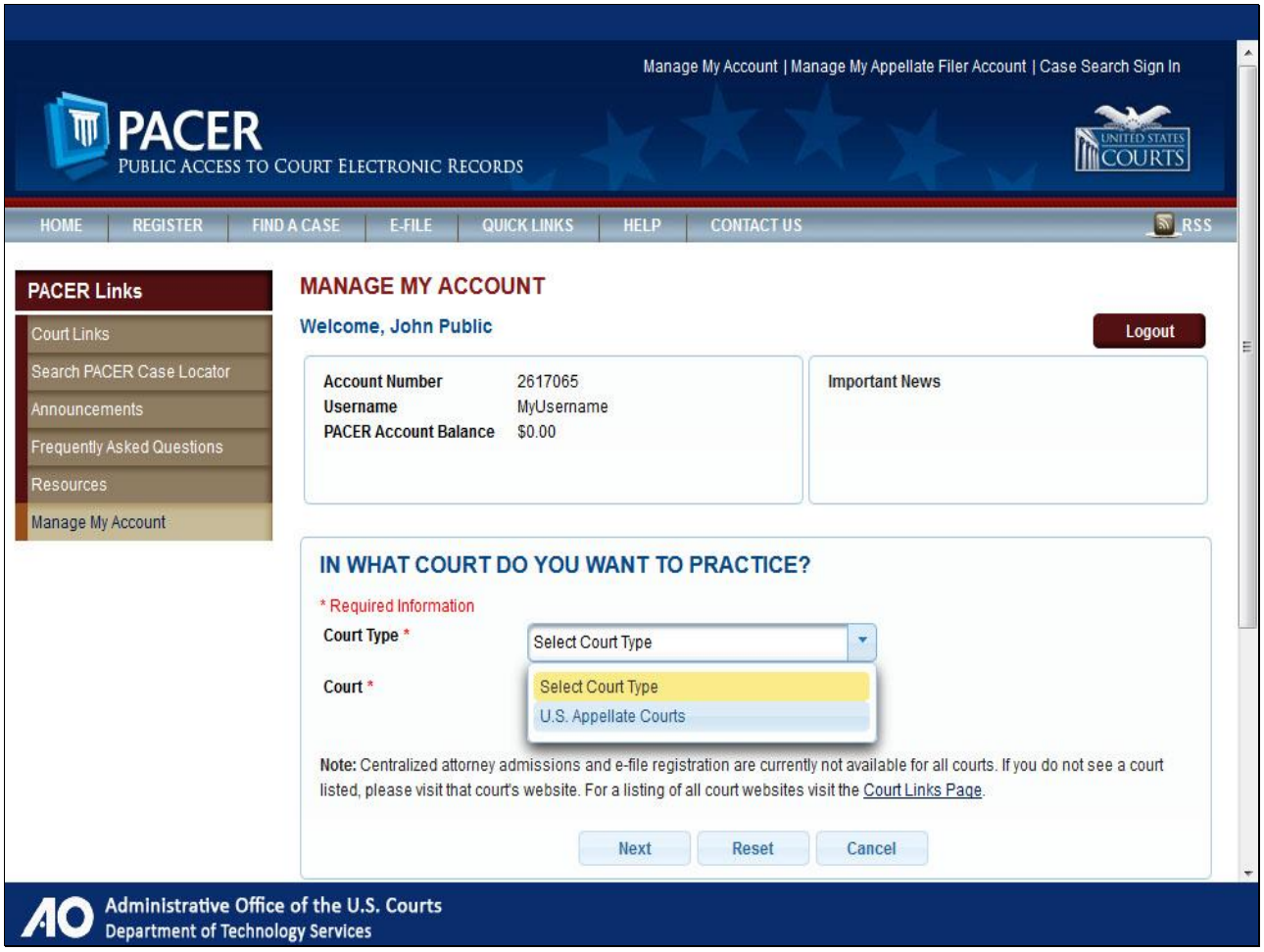
Then, click Attorney Admissions/E-File Registration.

Slide 55

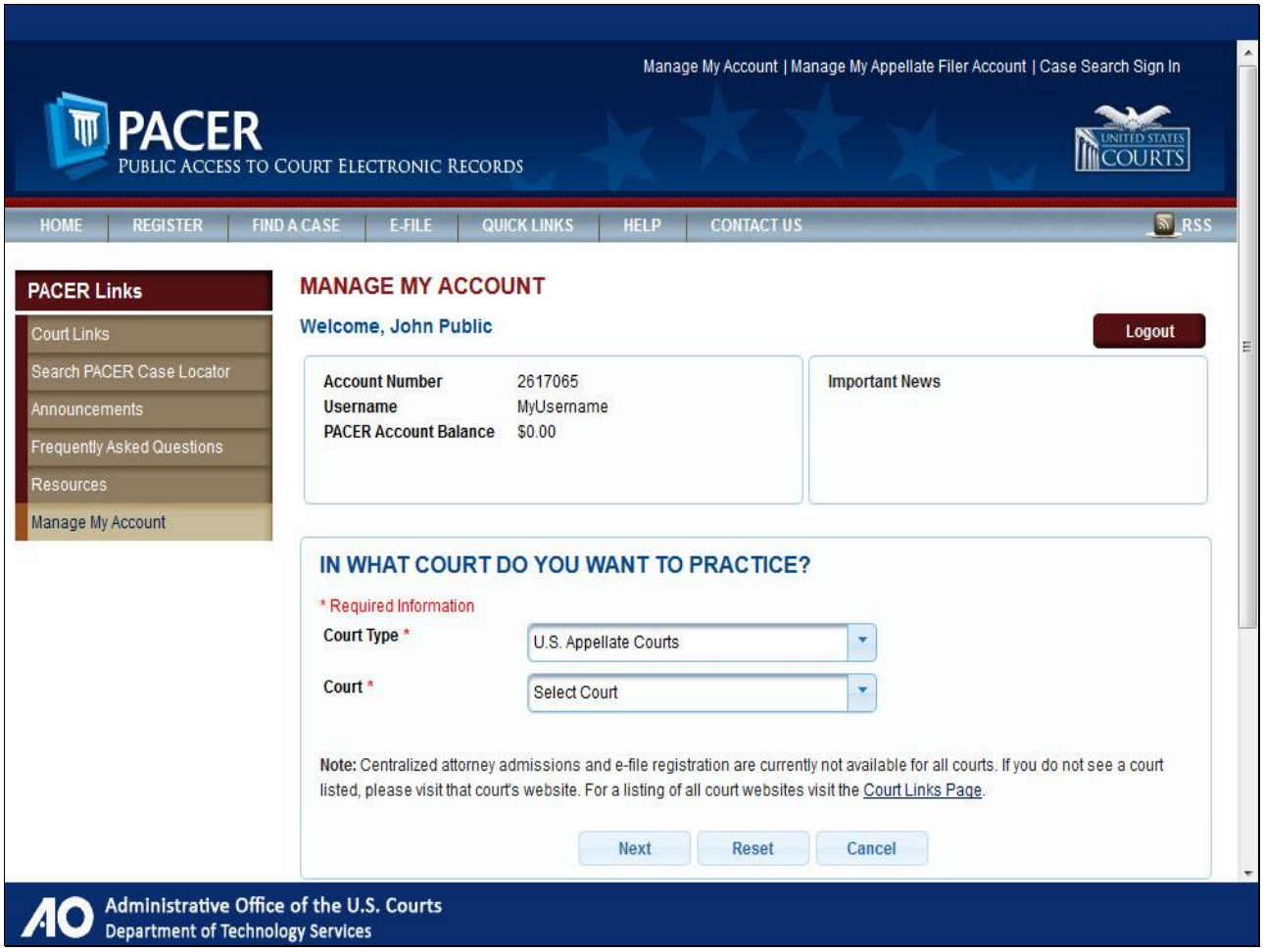


Select the Court Type and Court.

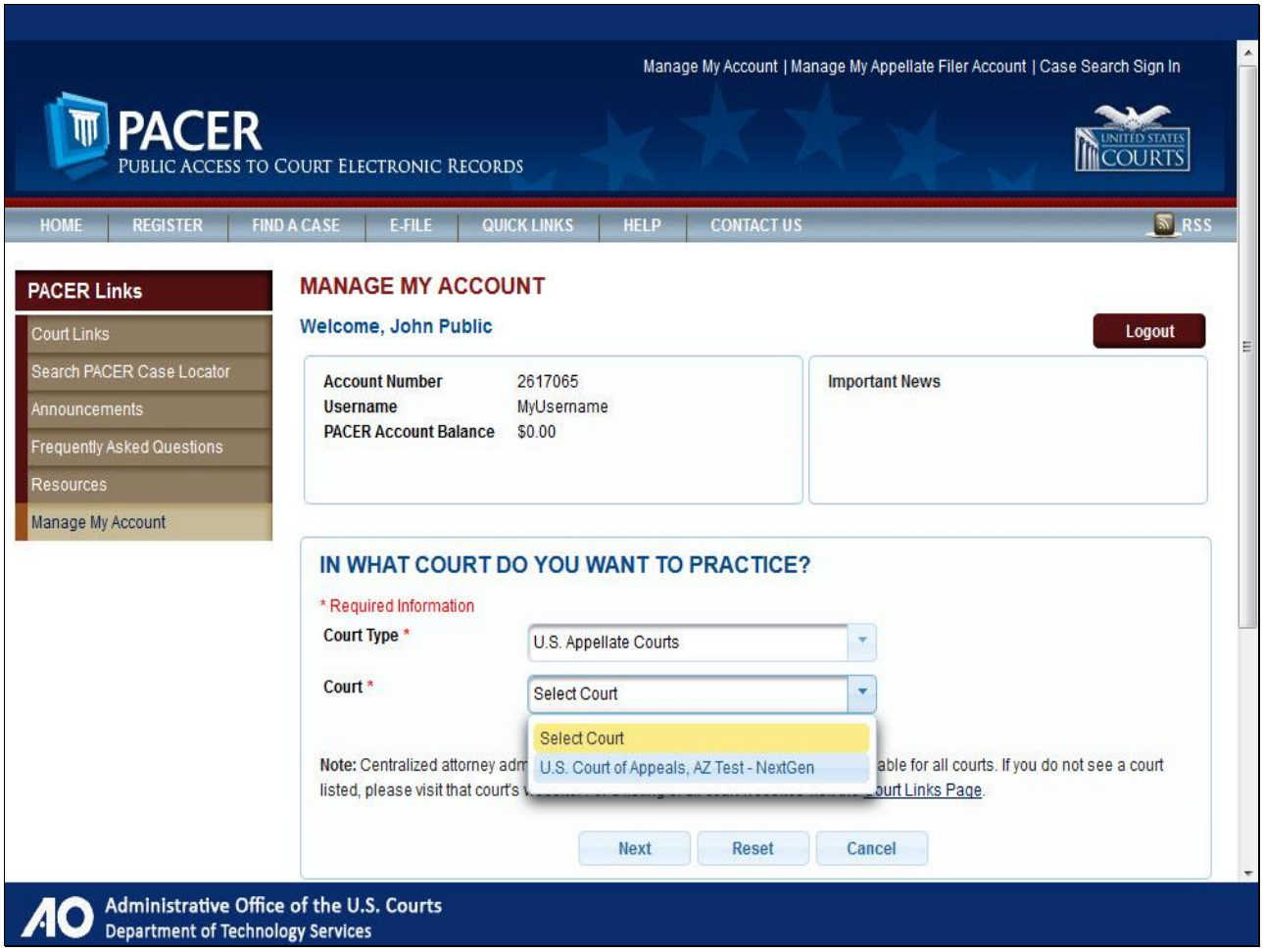
Slide 56


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
PACER Links
Court Links
Search PACER Case Locator
Announcements
Frequently Asked Questions
Resources
Manage My Account
MANAGE MY ACCOUNT
Welcome, John Public
Logout
Account Number 2617065
Username MyUsername
PACER Account Balance $0.00
Important News
IN WHAT COURT DO YOU WANT TO PRACTICE?
* Required Information
Court Type *
Select Court Type
Court *
Select Court Type
U.S. Appellate Courts
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.
Next
Reset
Cancel
Administrative Office of the U.S. Courts
Department of Technology Services

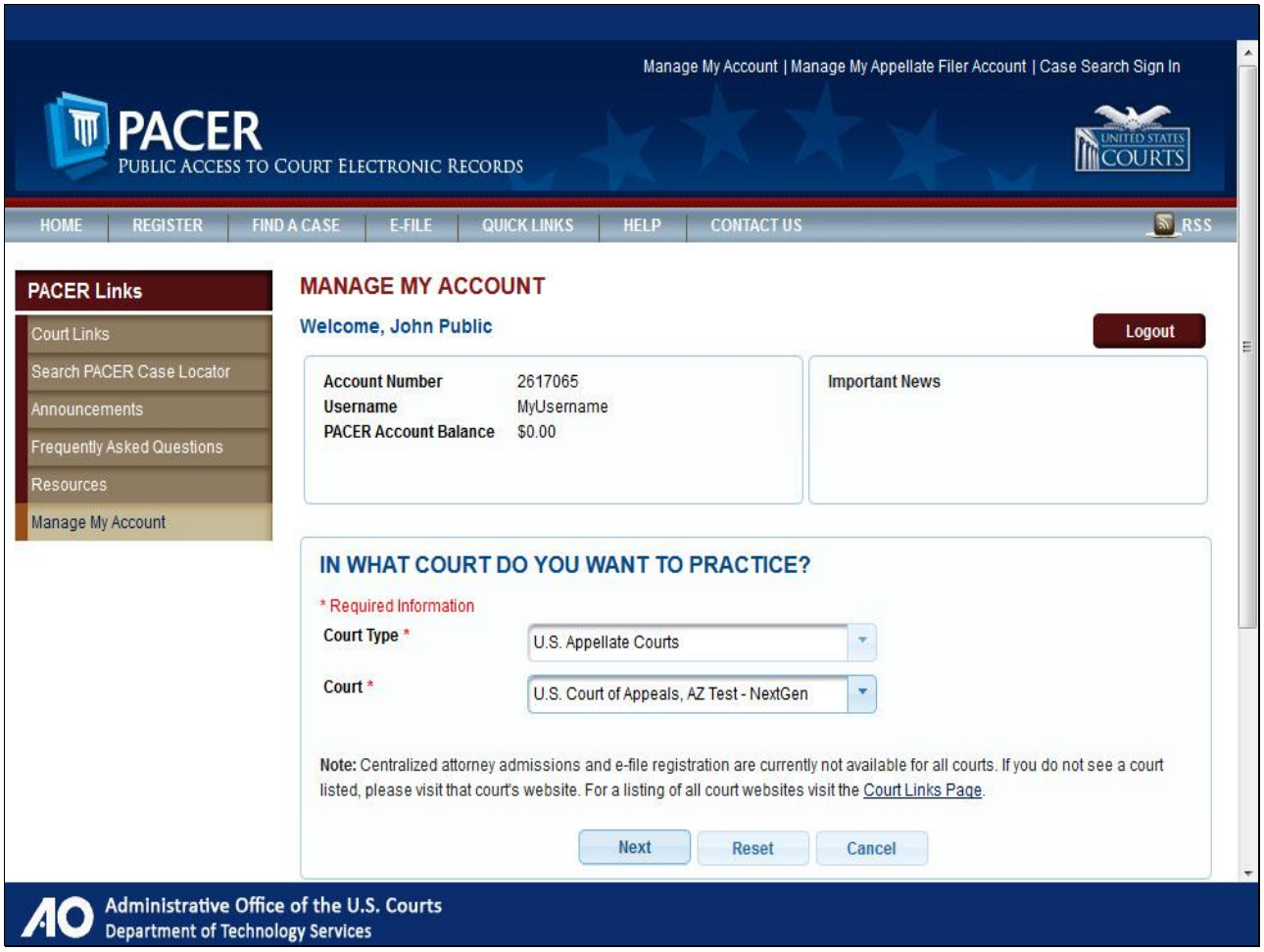
Slide 57


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
PACER Links
Court Links
Search PACER Case Locator
Announcements
Frequently Asked Questions
Resources
Manage My Account
MANAGE MY ACCOUNT
Welcome, John Public
Logout
Account Number 2617065
Username MyUsername
PACER Account Balance $0.00
Important News
IN WHAT COURT DO YOU WANT TO PRACTICE?
* Required Information
Court Type *
U.S. Appellate Courts
Court *
Select 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.
Next
Reset
Cancel
Administrative Office of the U.S. Courts
Department of Technology Services

Slide 58

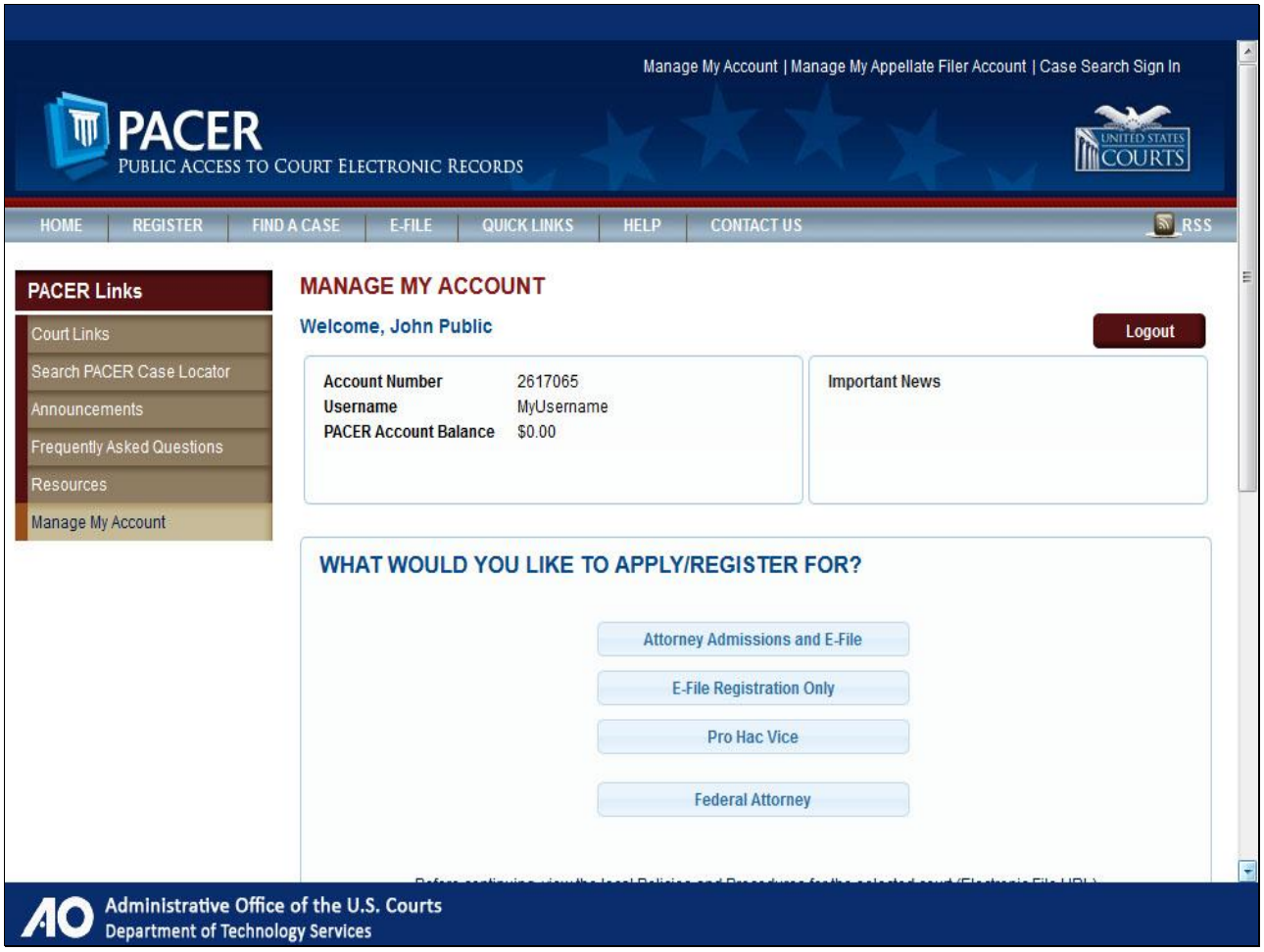

Manage My Account | Manage My Appellate Filer Account | Case Search Sign In
PACER
PUBLIC ACCESS TO COURT ELECTRONIC RECORDS
UNITED STATES COURTS
HOME
REGISTER
FIND A CASE
E-FILE
QUICK LINKS
HELP
CONTACT US
RSS
PACER Links
Court Links
Search PACER Case Locator
Announcements
Frequently Asked Questions
Resources
Manage My Account
MANAGE MY ACCOUNT
Welcome, John Public
Logout
Account Number 2617065
Username MyUsername
PACER Account Balance $0.00
Important News
IN WHAT COURT DO YOU WANT TO PRACTICE?
* Required Information
Court Type *
U.S. Appellate Courts
Court *
Select Court
Select Court
U.S. Court of Appeals, AZ Test - NextGen
Note: Centralized attorney adm
able for all courts. If you do not see a court
listed, please visit that court's
ourt Links Page.
Next
Reset
Cancel
Administrative Office of the U.S. Courts
Department of Technology Services

Slide 59



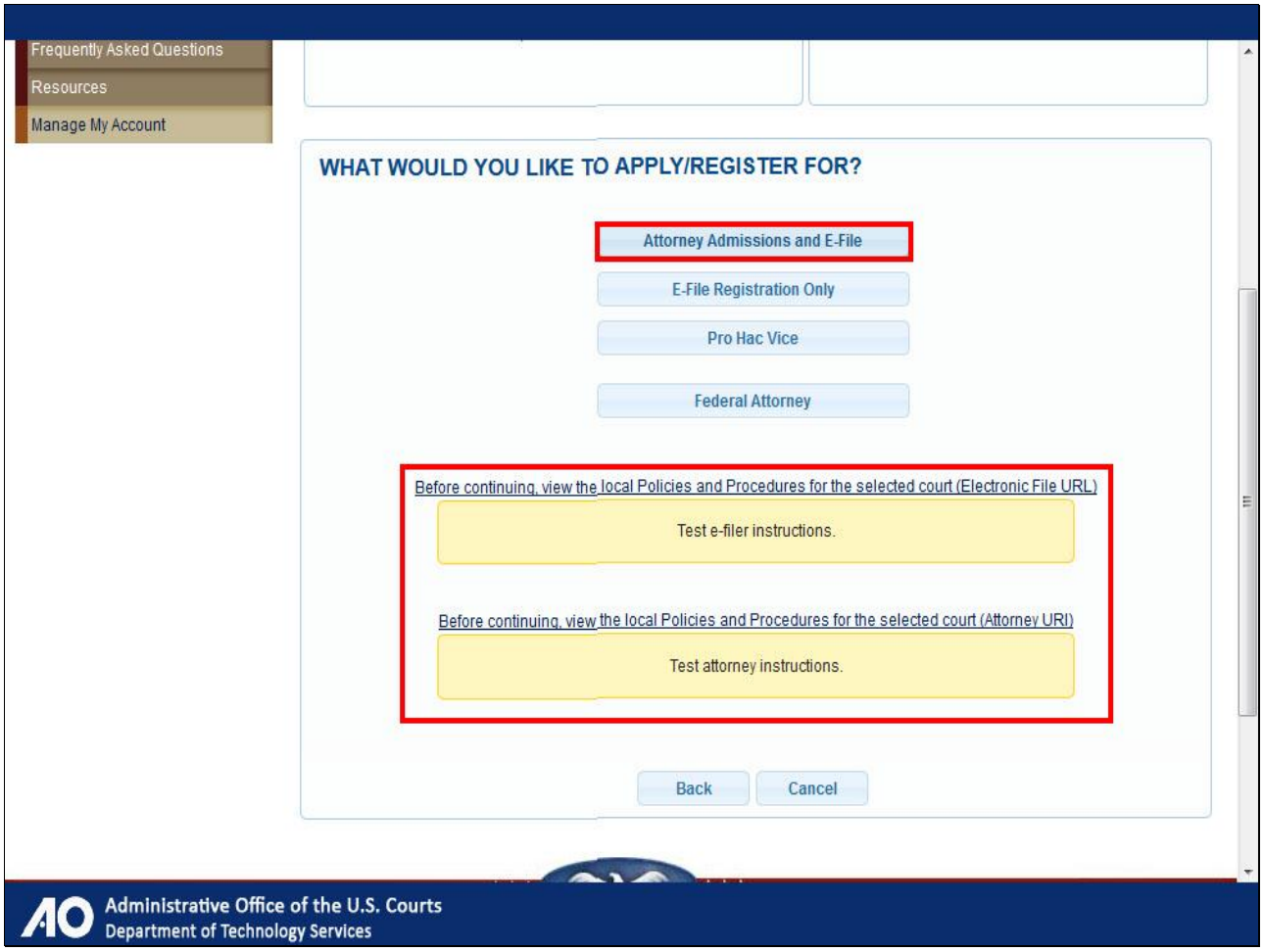
Click Next after Court Type and Court are selected.

Slide 60



Scroll down.

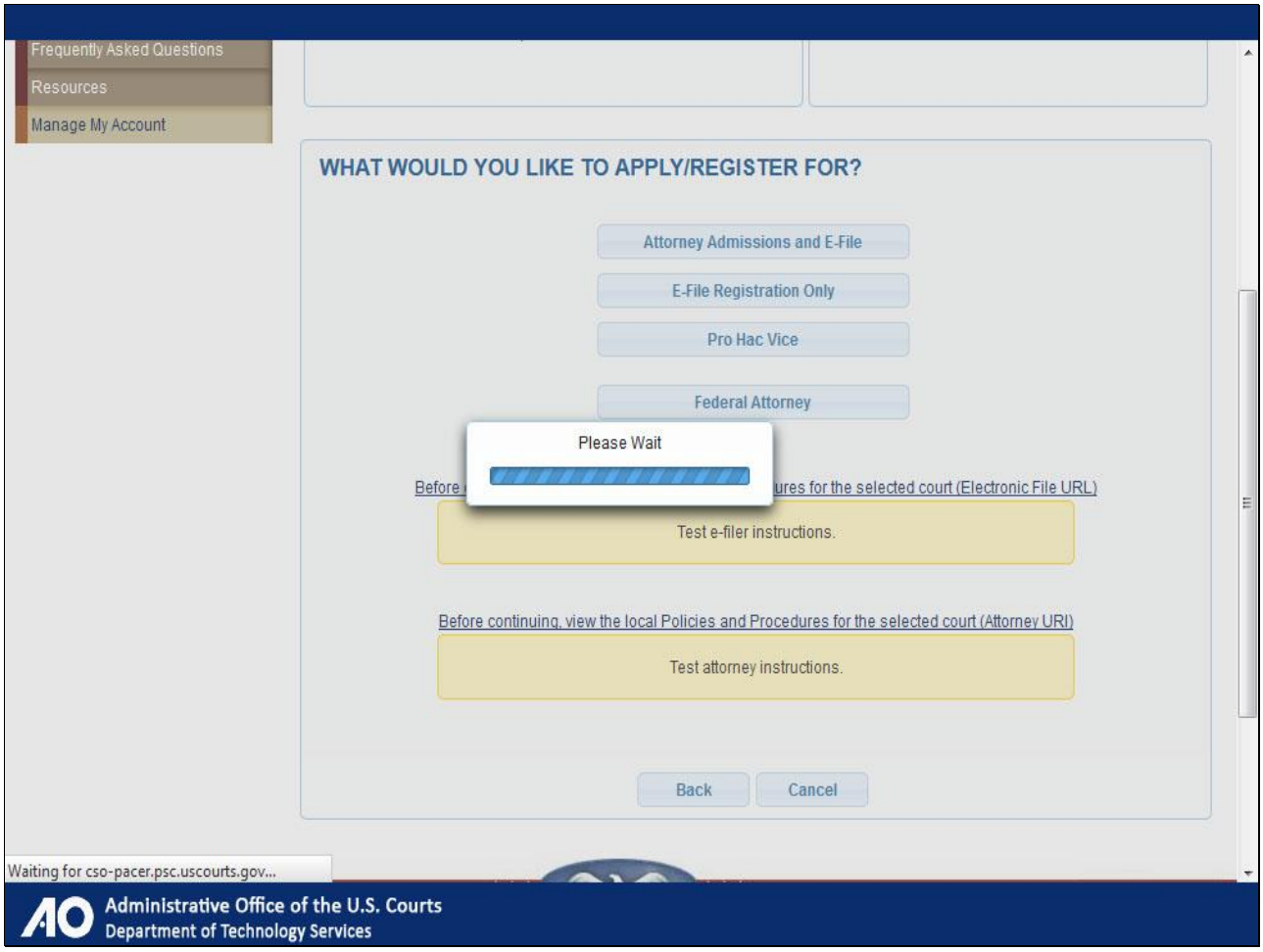
Slide 61



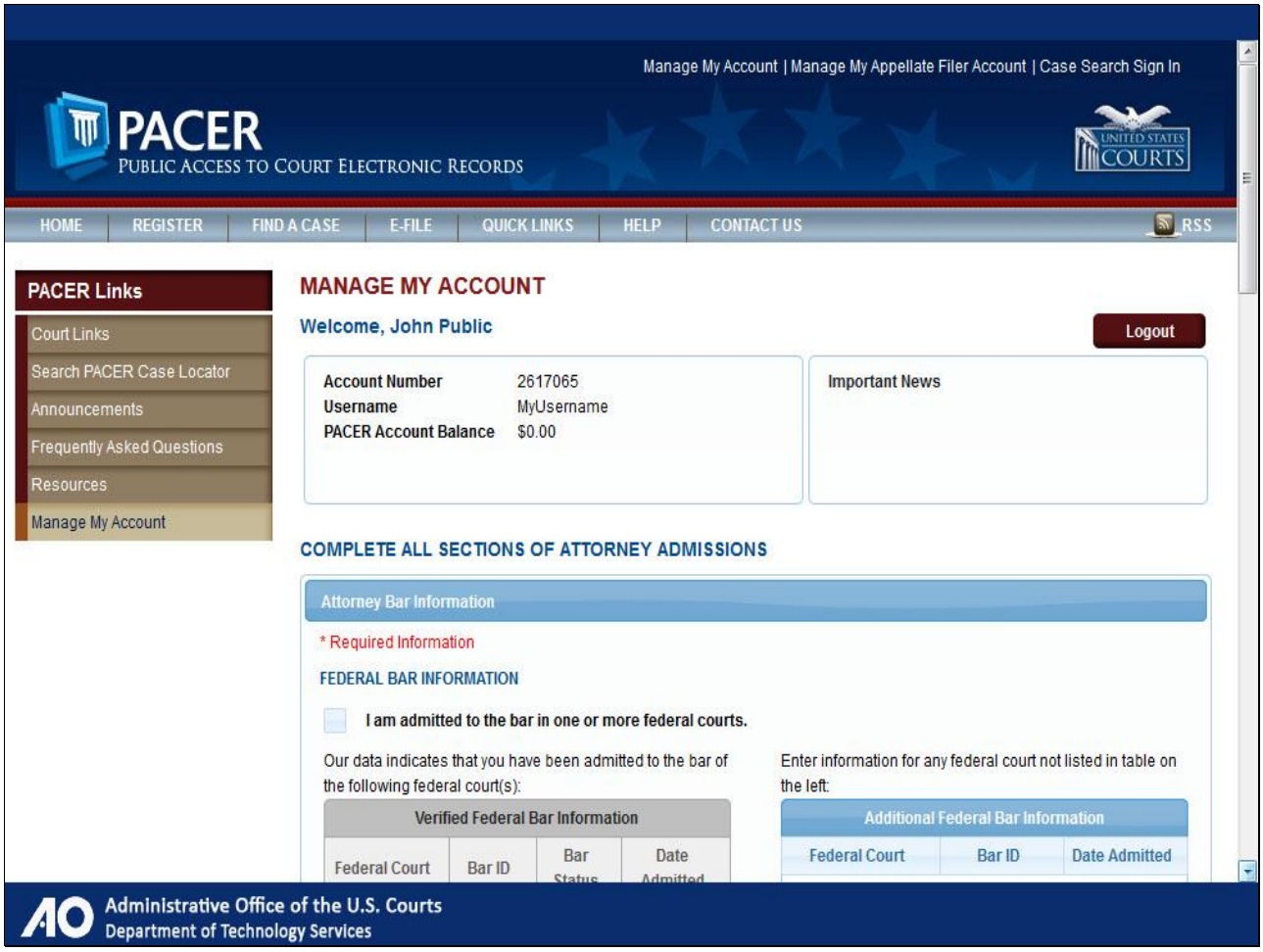
Before you can apply for admission and e-file privileges in a court, you must review the admissions and e-file policies and procedures for the court you have selected by clicking the appropriate links.

Once you have completed this step, click Attorney Admissions and E-File.

Slide 62

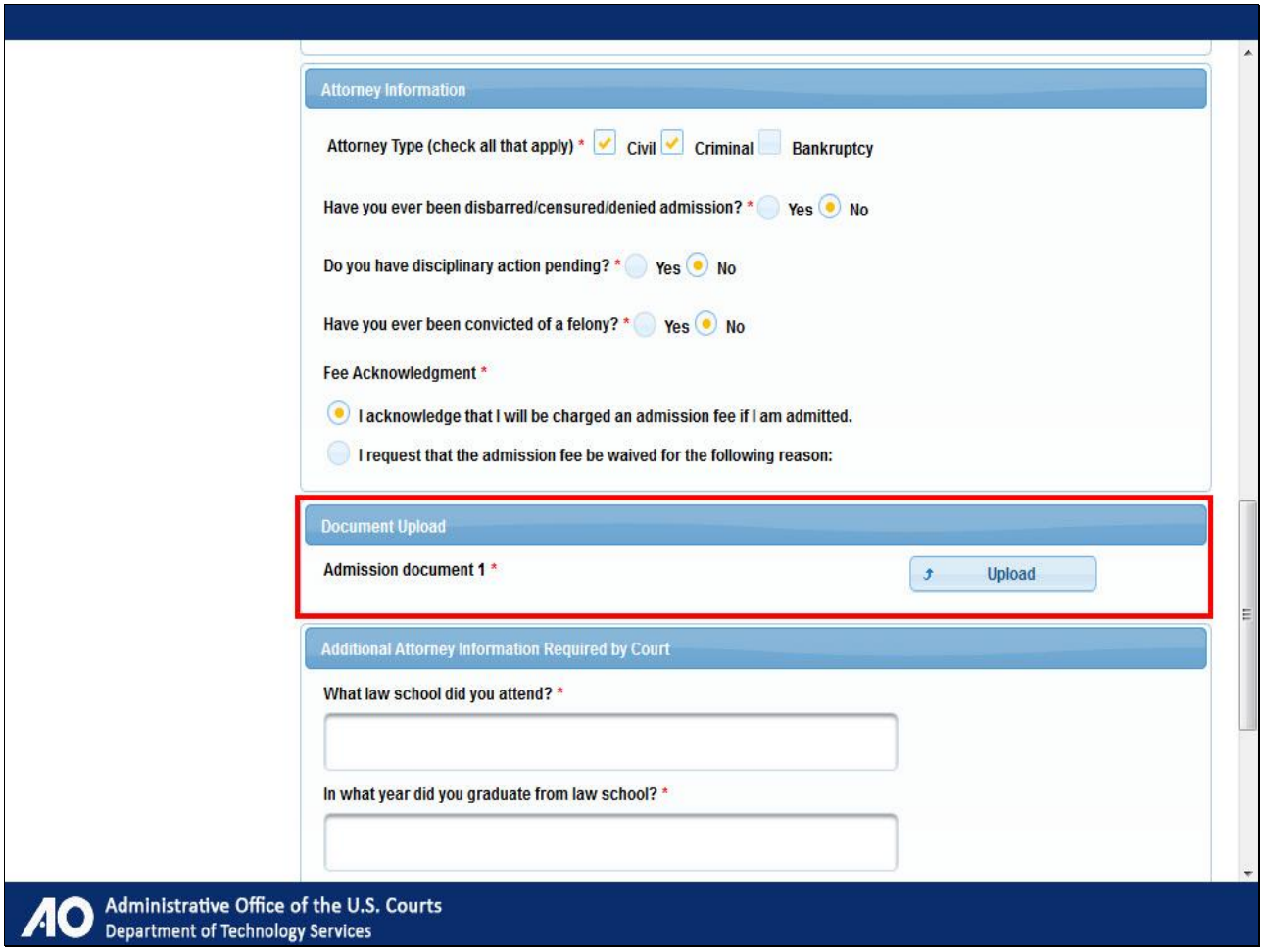

Frequently Asked Questions
Resources
Manage My Account
WHAT WOULD YOU LIKE TO APPLY/REGISTER FOR?
Attorney Admissions and E-File
E-File Registration Only
Pro Hac Vice
Federal Attorney
Please Wait
ures for the selected court (Electronic File URL)
Test e-filer instructions.
Before continuing, view the local Policies and Procedures for the selected court (Attorney URI)
Test attorney instructions.
Back
Cancel
Waiting for cso-pacer.psc.uscourts.gov...
Administrative Office of the U.S. Courts
Department of Technology Services

Slide 63



Complete all sections for attorney admissions. Scroll down.

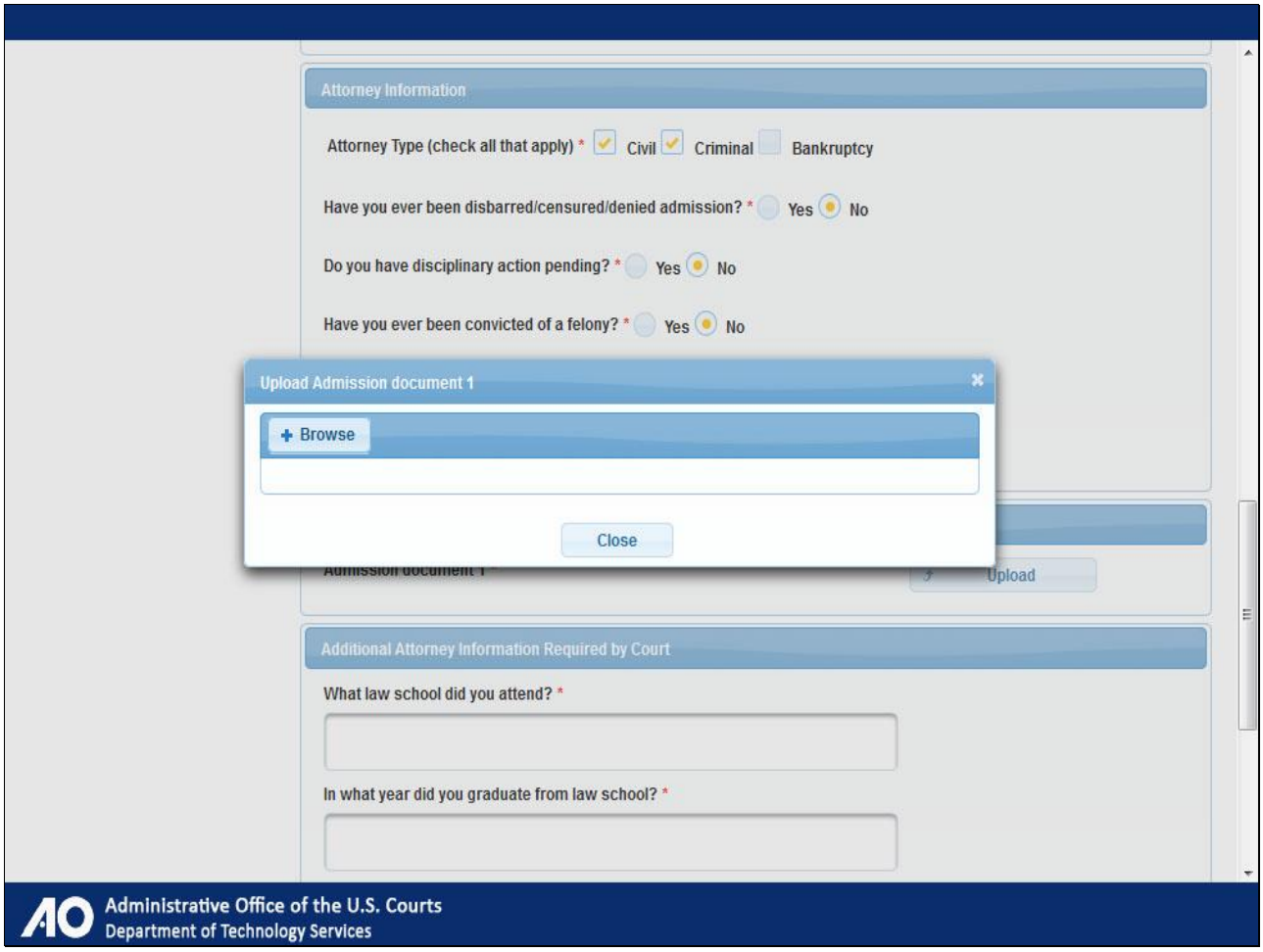
Slide 64



Complete the Attorney Information section.

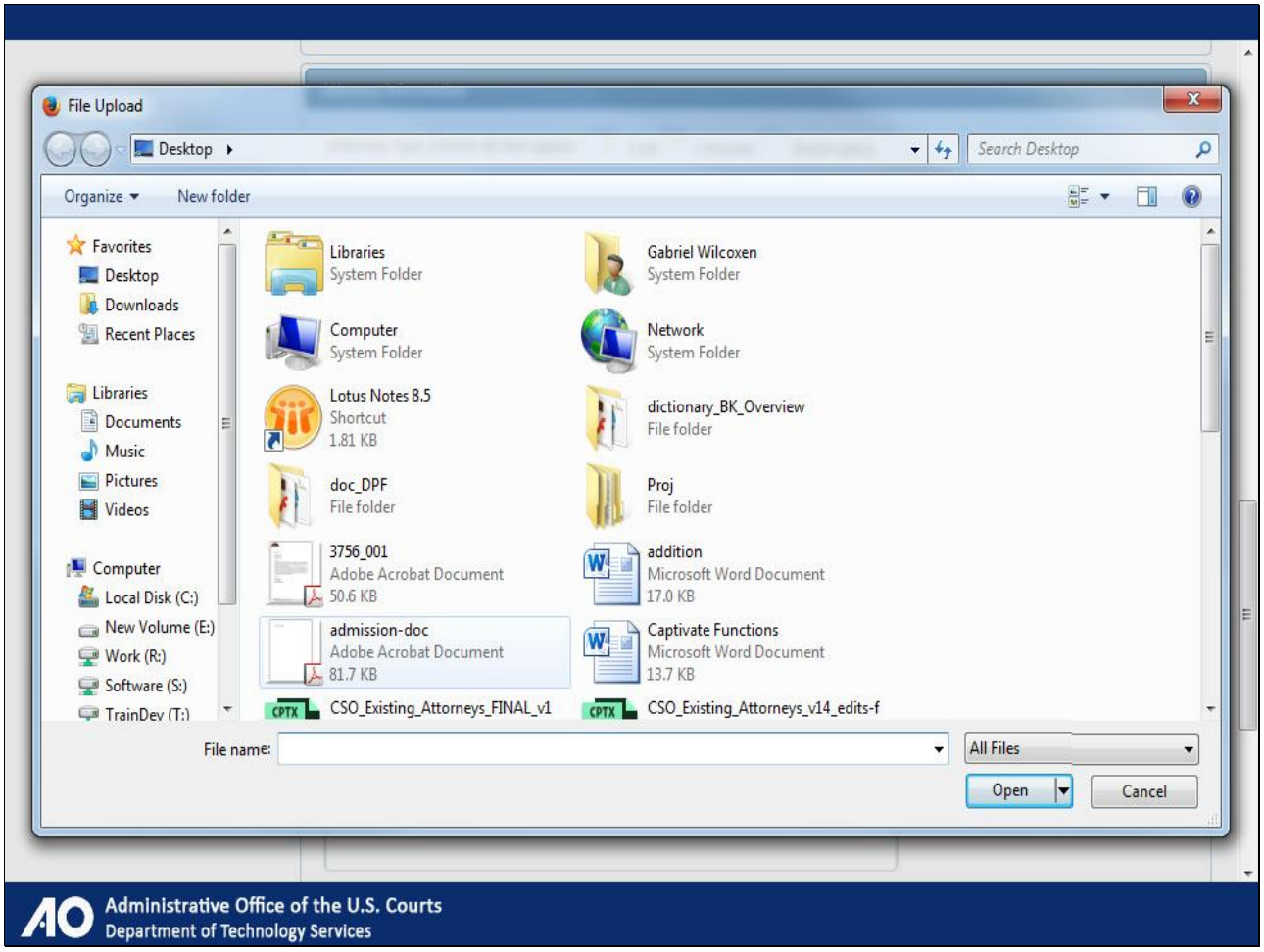
Before uploading files, it is worth noting that different courts have different requirements. Some courts may require you to upload up to three different files; however, others may require none. In this example, this court requires one file. Click Upload.

Slide 65



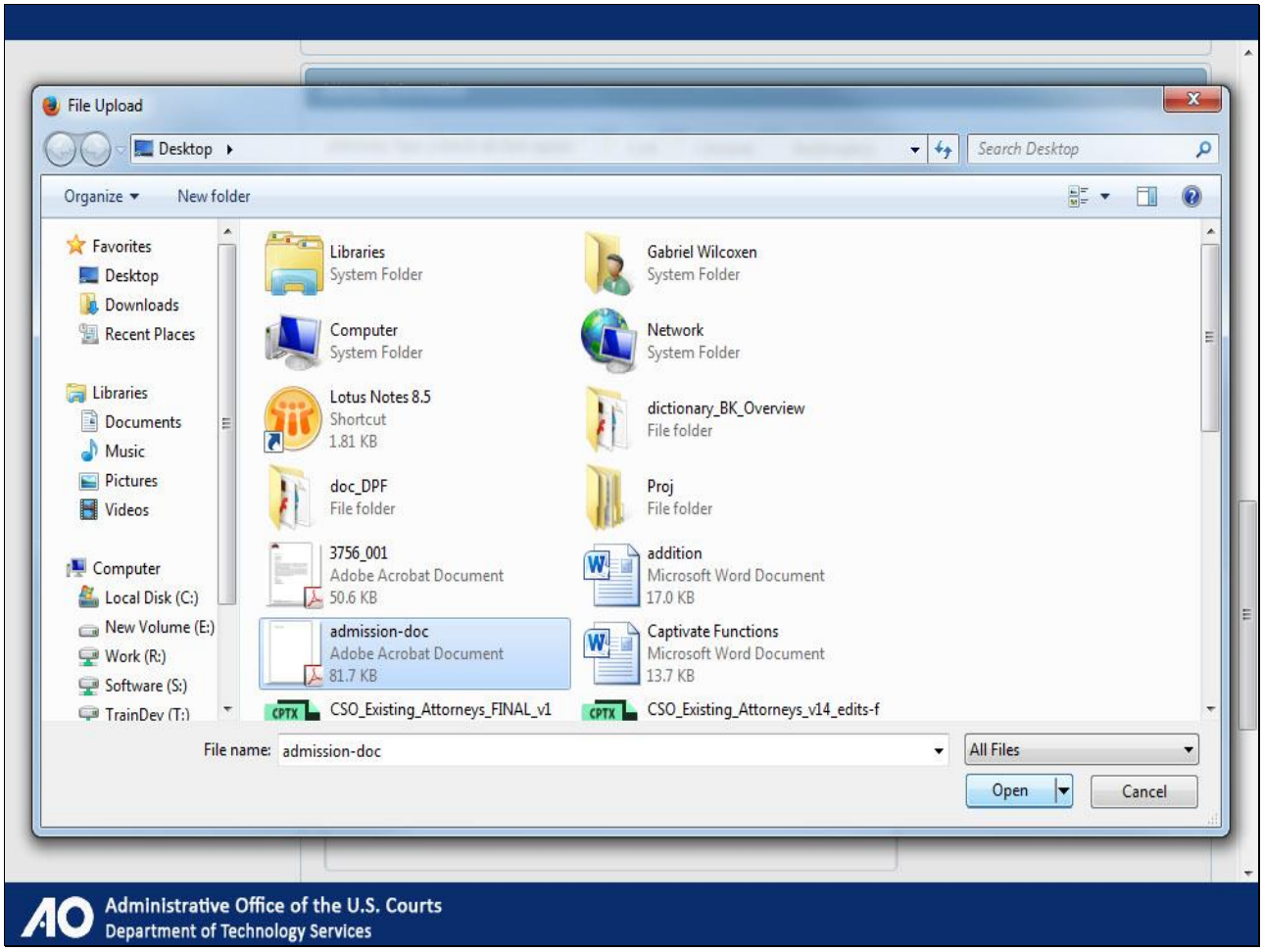
Browse to the file by clicking +Browse.

Slide 66



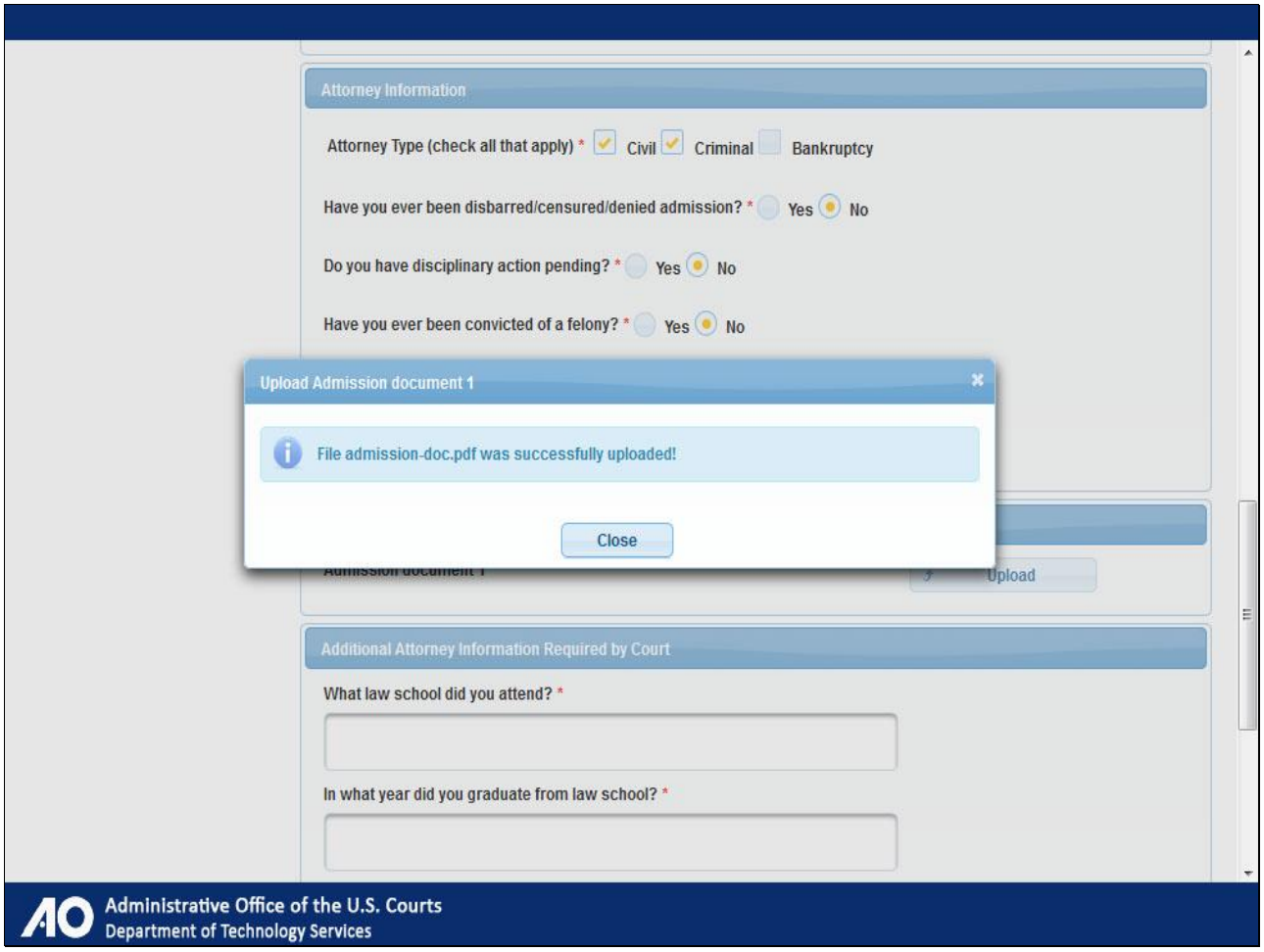
Browse and select.

Slide 67



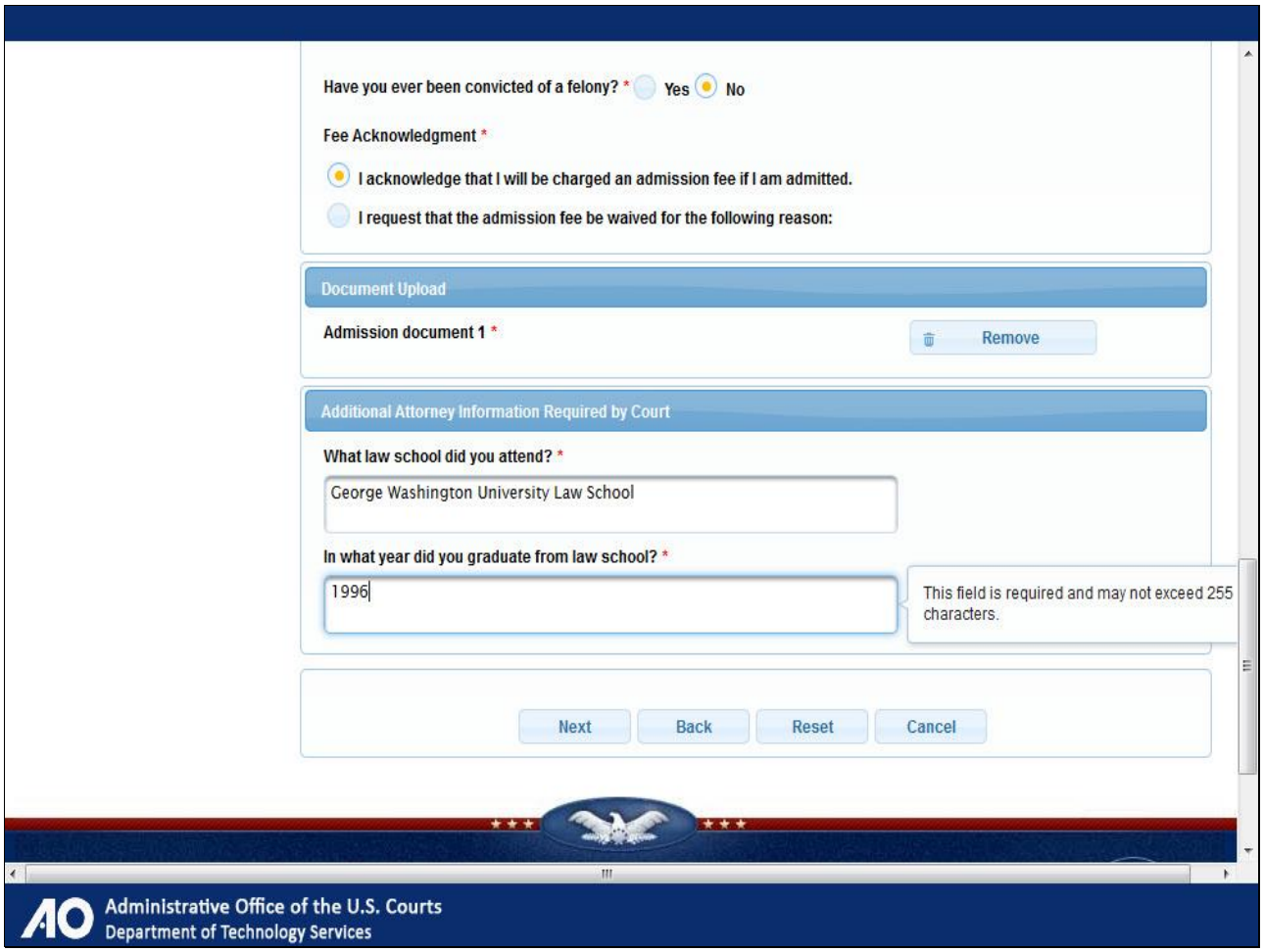
Click Open.

Slide 68



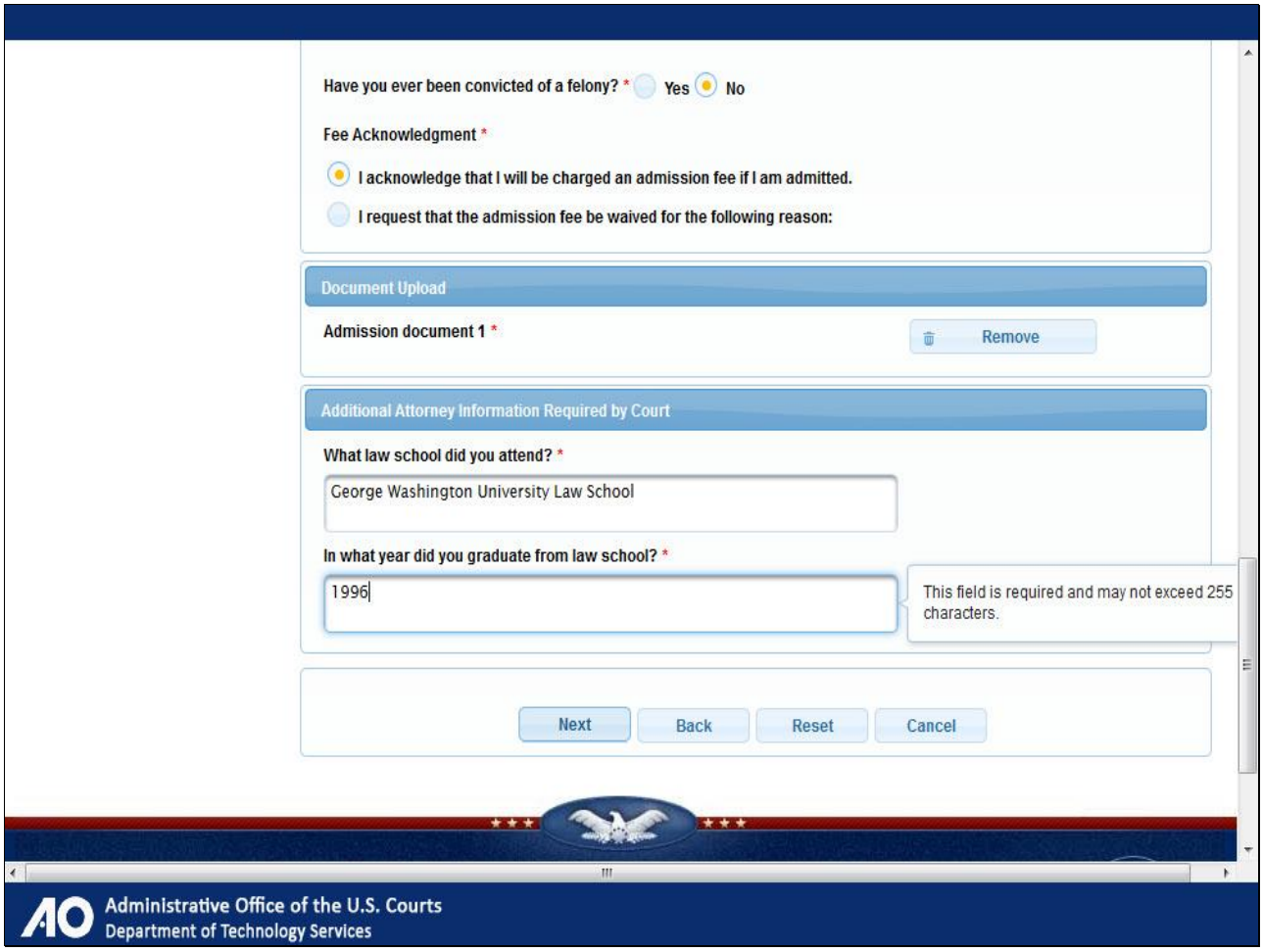
Upload successful.

Slide 69



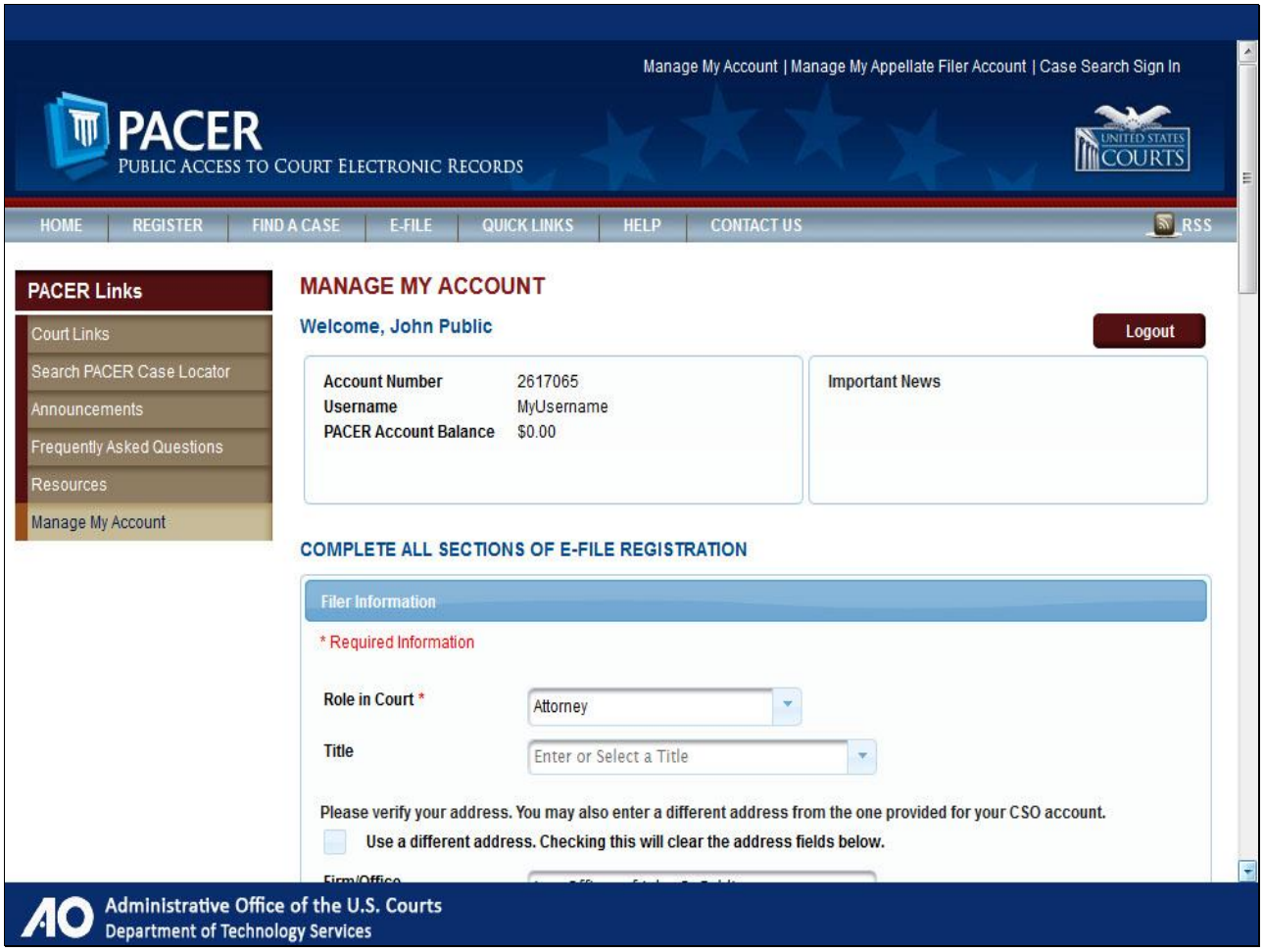
Continue completing all required sections and fields. Enter a law school and date.

Slide 70



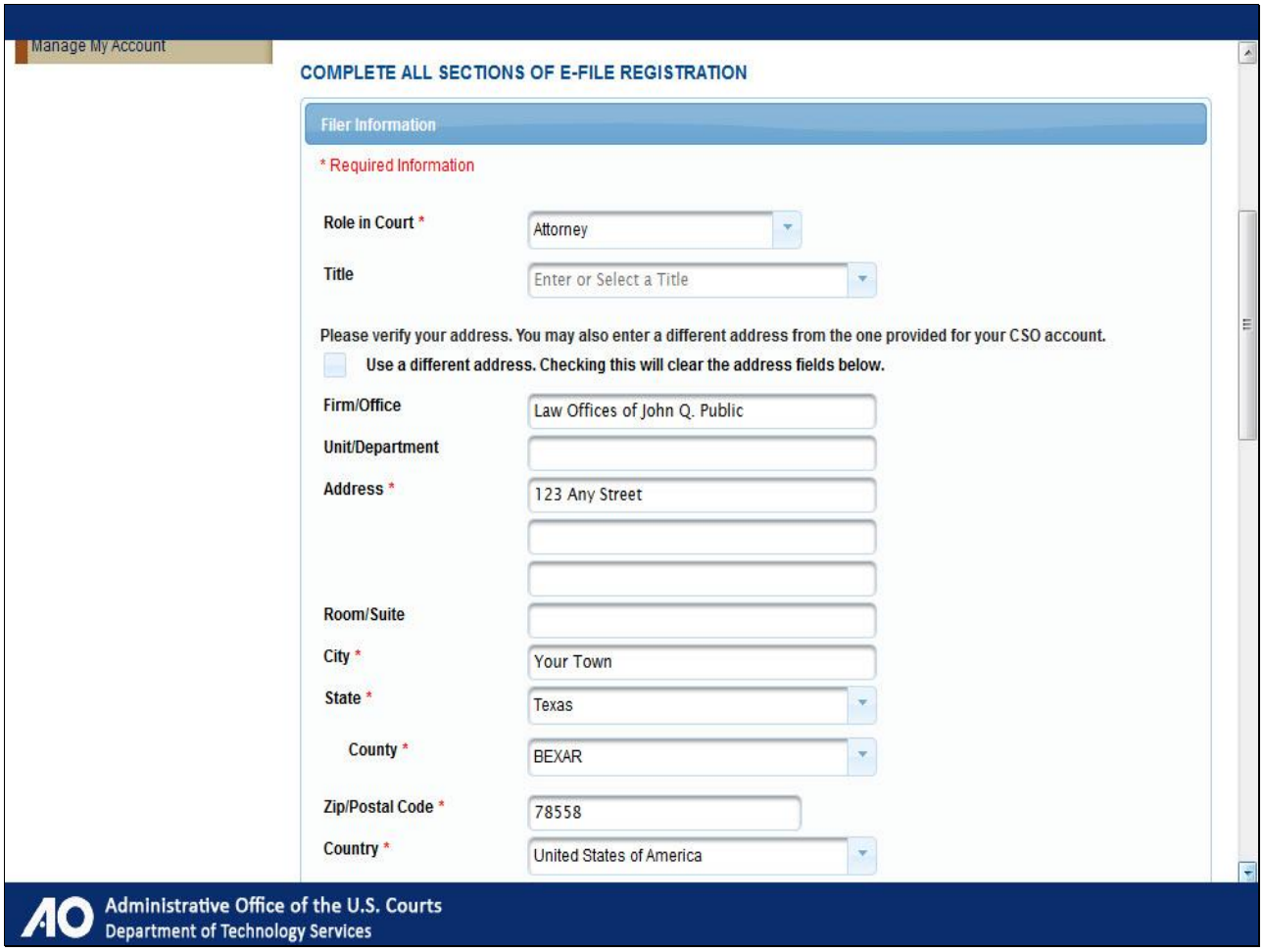
Click Next.

Slide 71



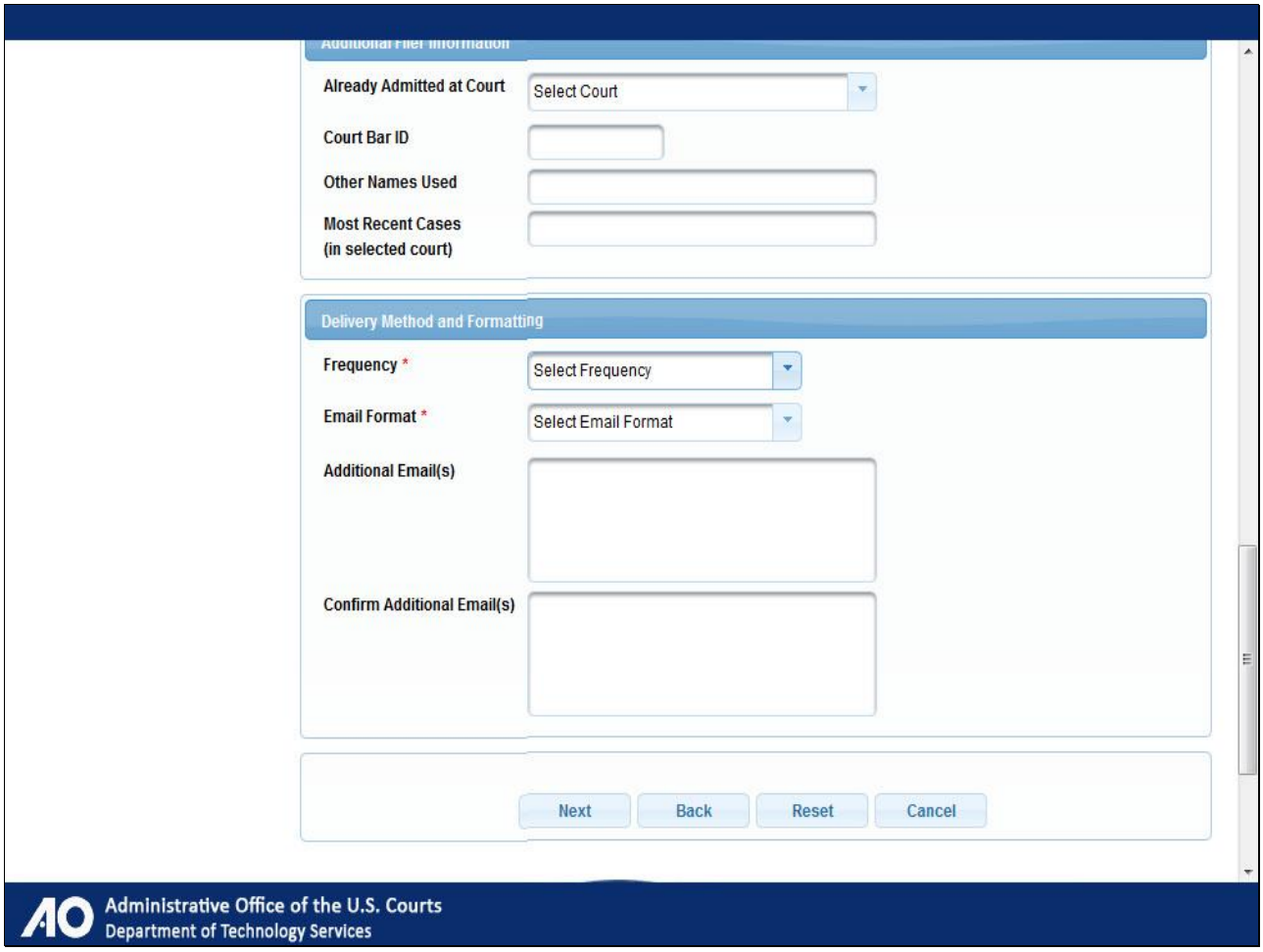
Complete Filer Information. Scroll down.

Slide 72



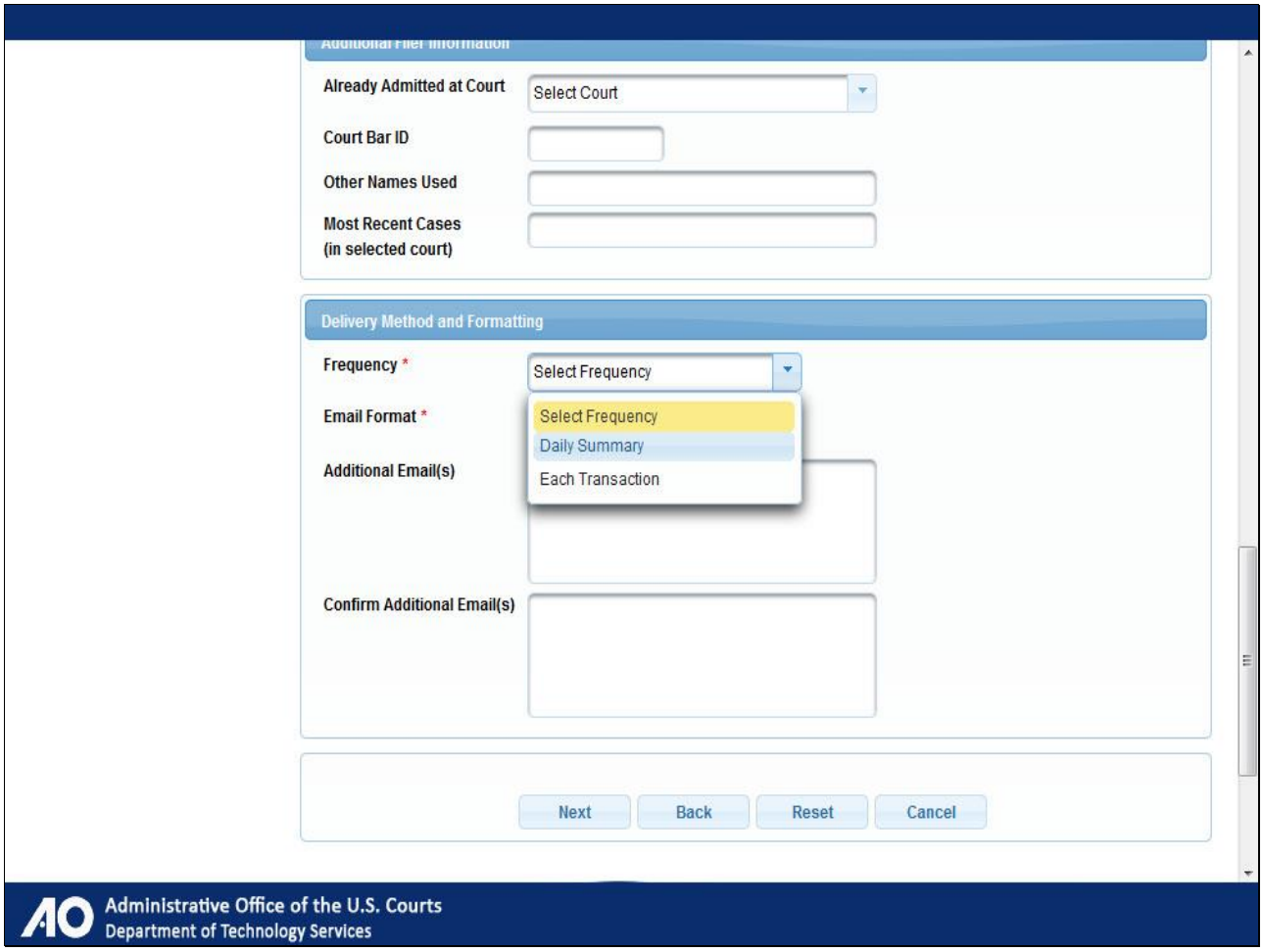
Most of the fields are pre-populated. Scroll down to the Delivery Method and Formatting section.

Slide 73

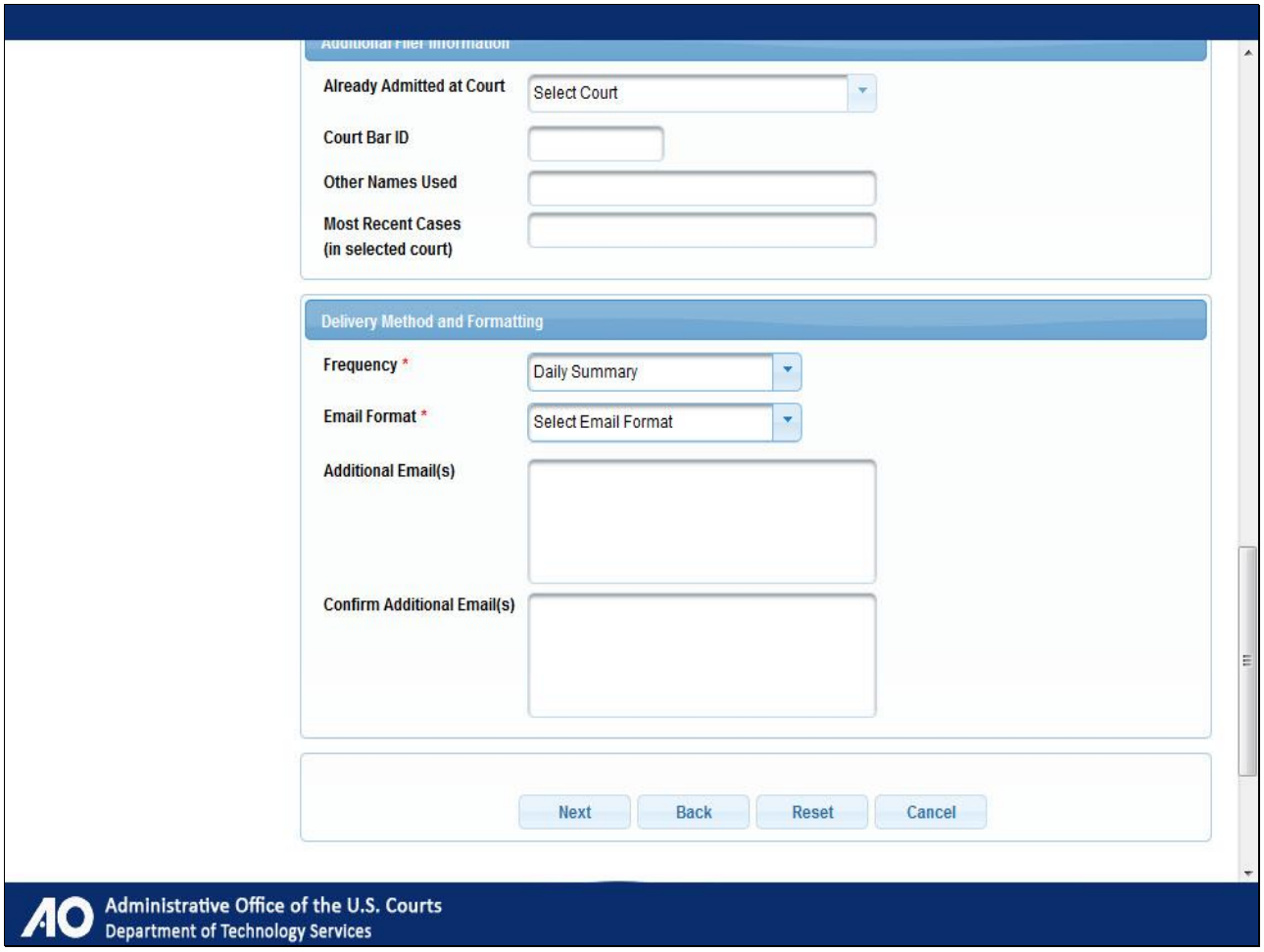


Complete the two required fields in the Delivery and Formatting section.

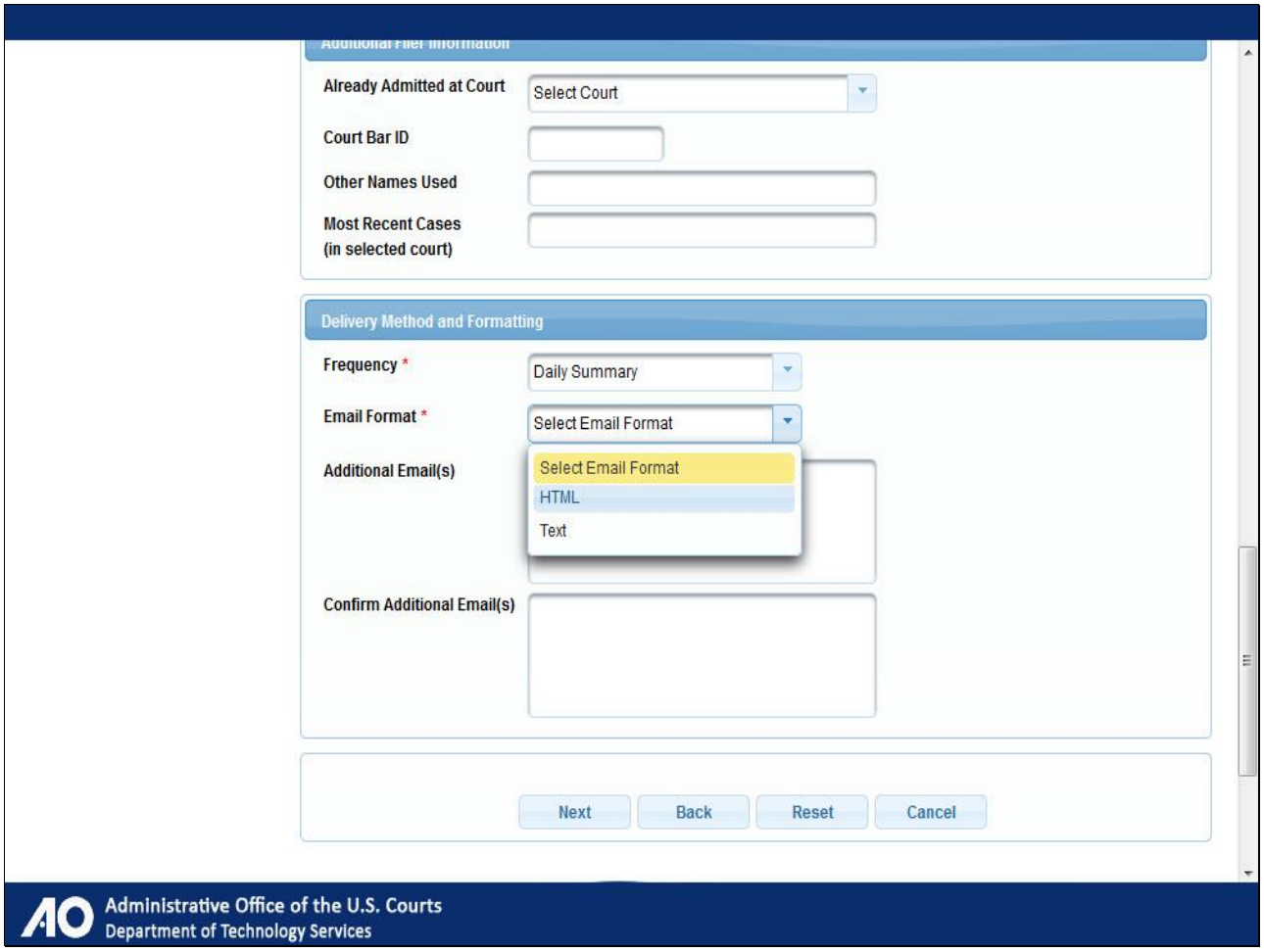
Slide 74


Already Admitted at Court
Select Court
Court Bar ID
Other Names Used
Most Recent Cases
(in selected court)
Delivery Method and Formatting
Frequency *
Select Frequency
Email Format *
Select Frequency
Daily Summary
Each Transaction
Additional Email(s)
Confirm Additional Email(s)
Next
Back
Reset
Cancel
Administrative Office of the U.S. Courts
Department of Technology Services

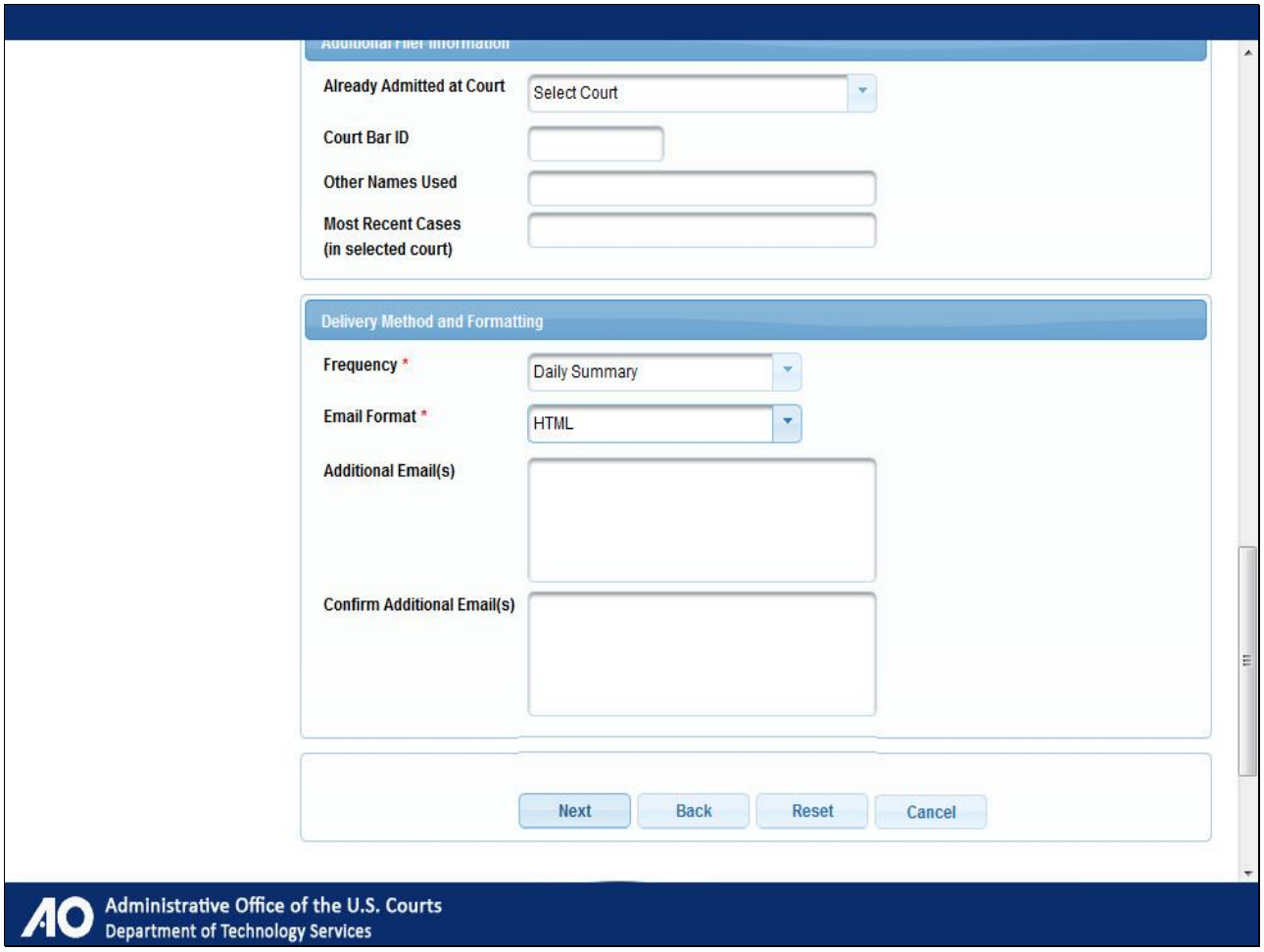
Slide 75


Already Admitted at Court
Select Court
Court Bar ID
Other Names Used
Most Recent Cases
(in selected court)
Delivery Method and Formatting
Frequency *
Daily Summary
Email Format *
Select Email Format
Additional Email(s)
Confirm Additional Email(s)
Next
Back
Reset
Cancel
Administrative Office of the U.S. Courts
Department of Technology Services

Slide 76

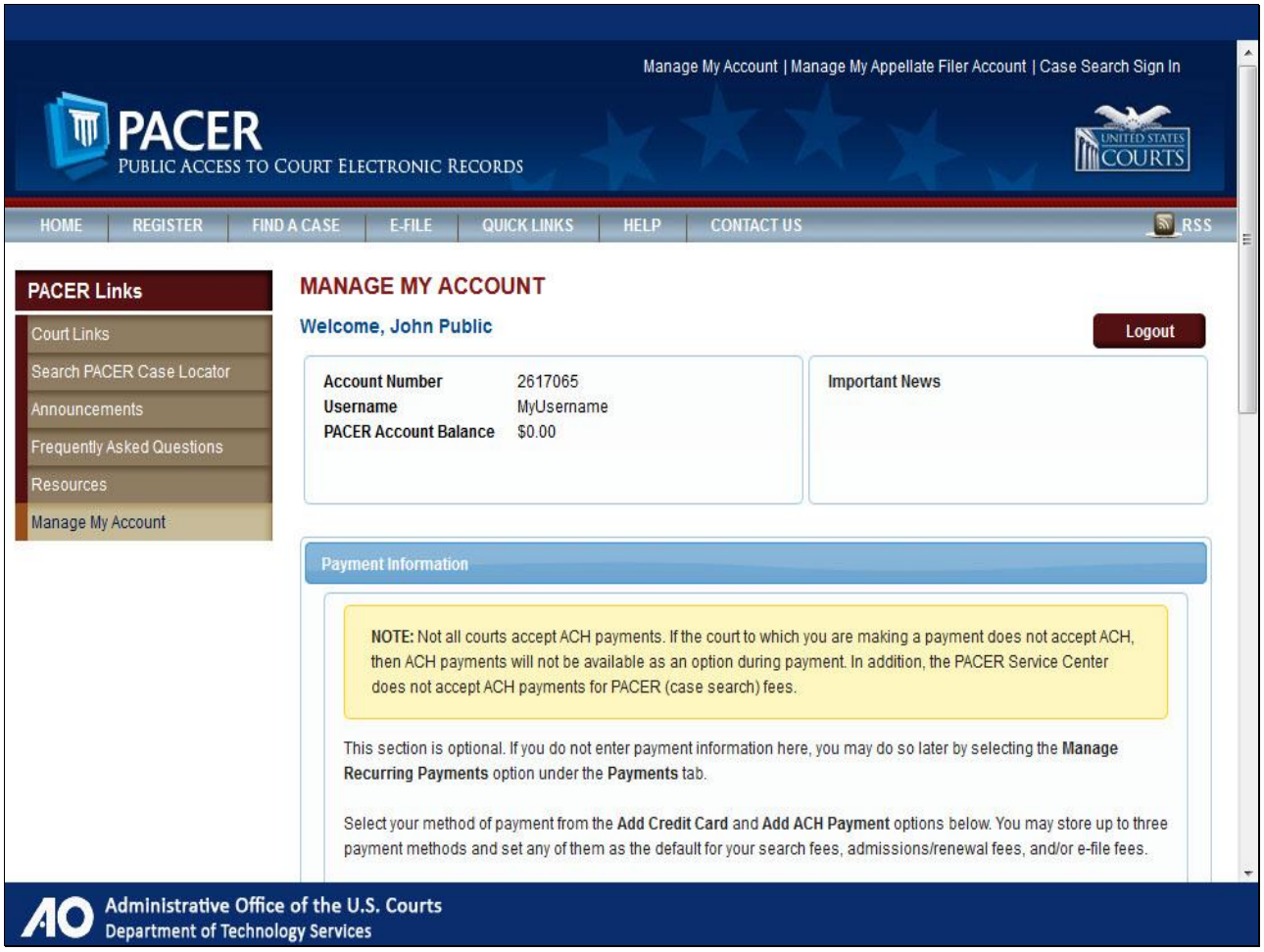

Already Admitted at Court
Select Court
Court Bar ID
Other Names Used
Most Recent Cases
(in selected court)
Delivery Method and Formatting
Frequency *
Daily Summary
Email Format *
Select Email Format
Additional Email(s)
Select Email Format
HTML
Text
Confirm Additional Email(s)
Next
Back
Reset
Cancel
Administrative Office of the U.S. Courts
Department of Technology Services

Slide 77



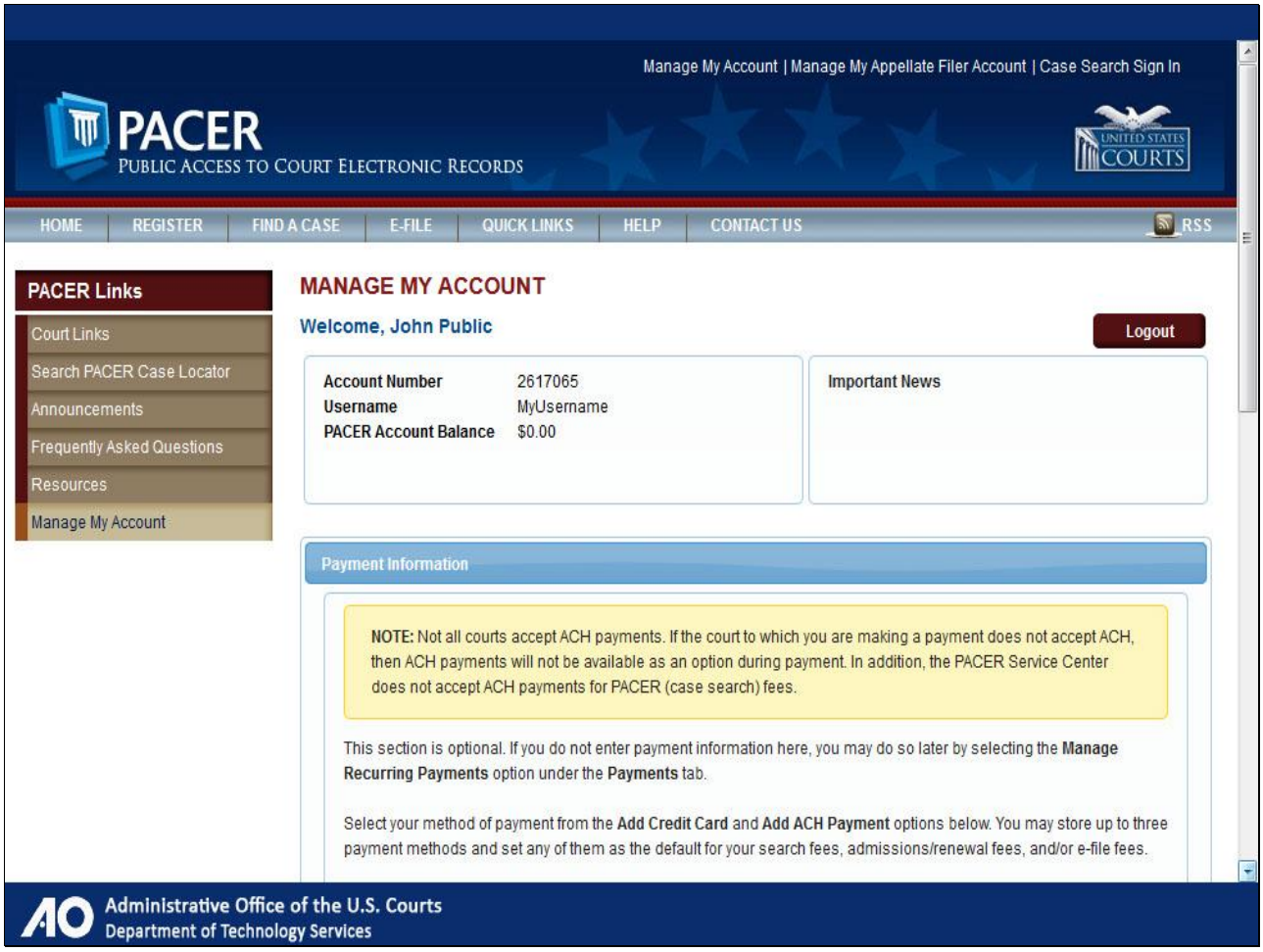
Click Next.

Slide 78



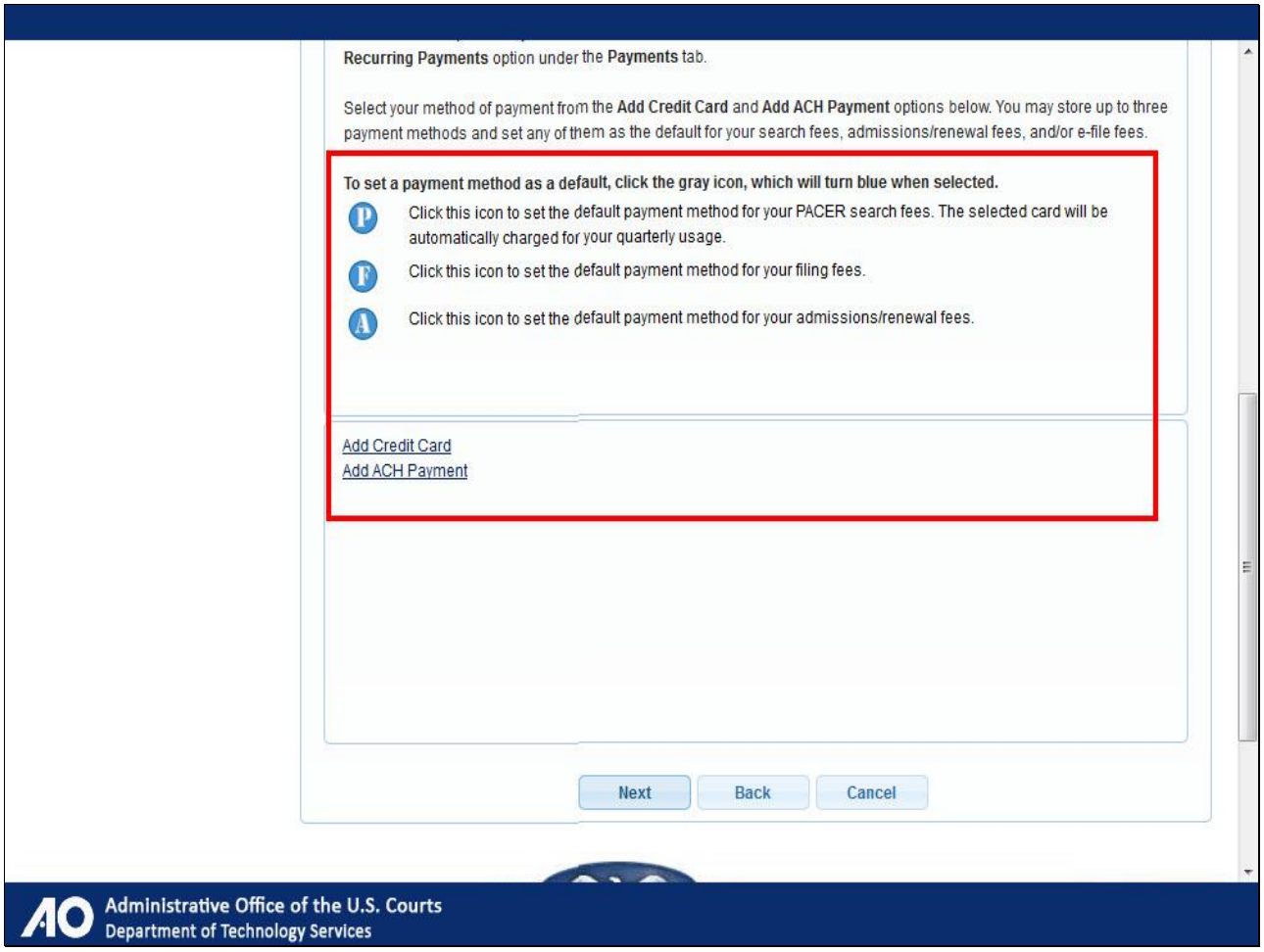
You are now in the section to enter payment information. This section is optional. For the purpose of this demonstration, we will not enter payment information.

Slide 79



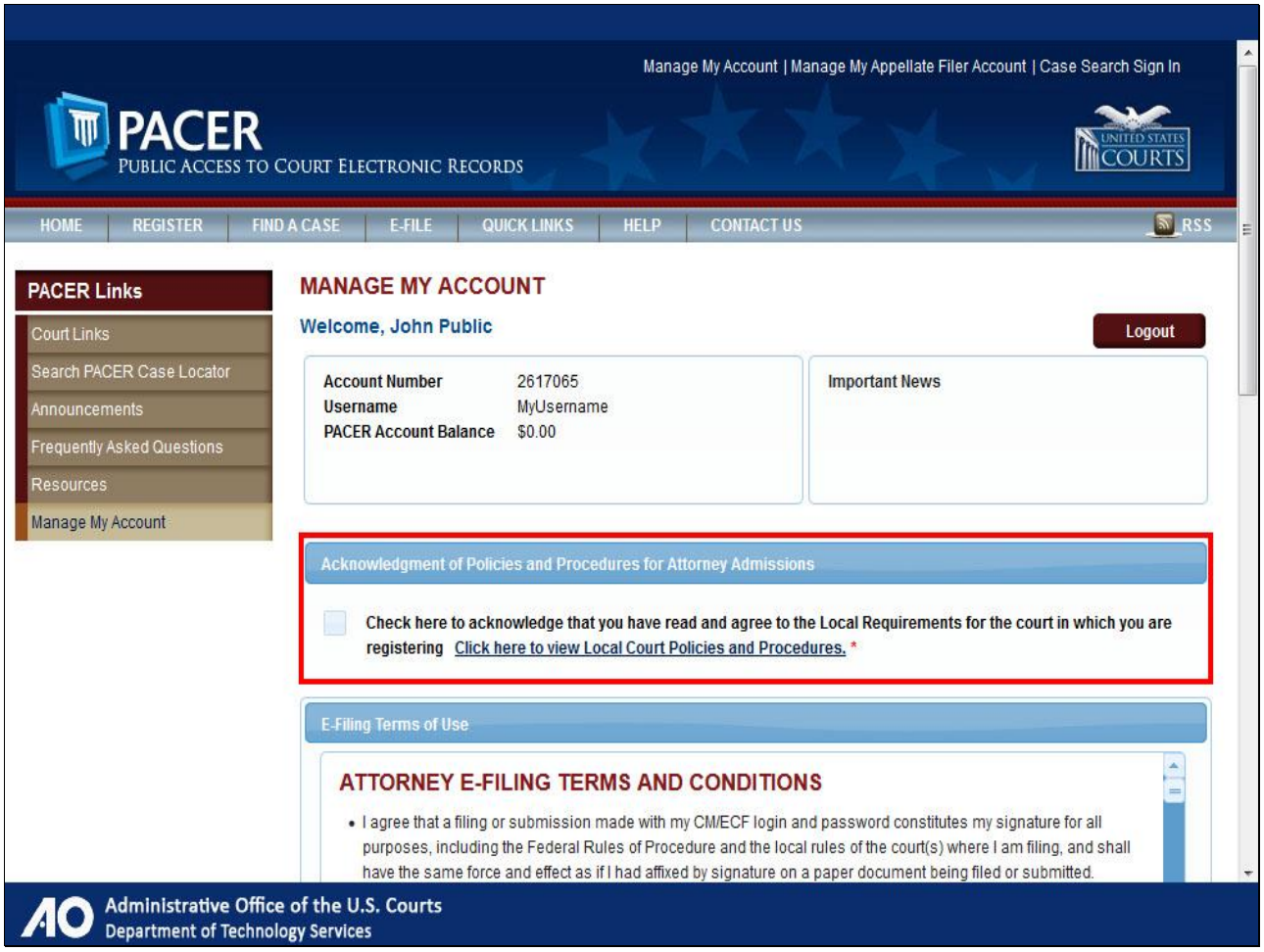
Scroll down.

Slide 80



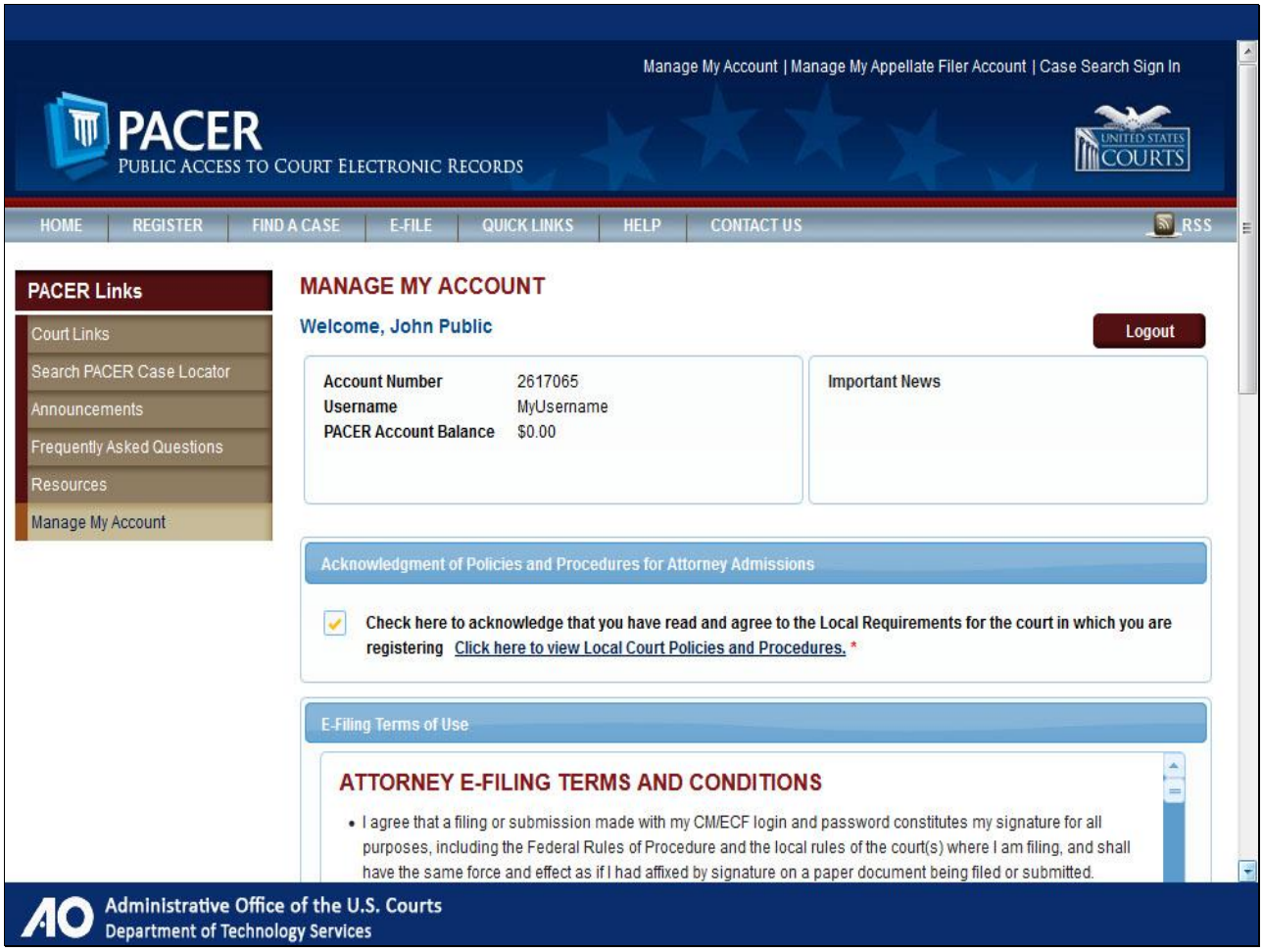
Note that this section also gives you the option to store credit card information to be used to pay your admission and filing fees.

Slide 81



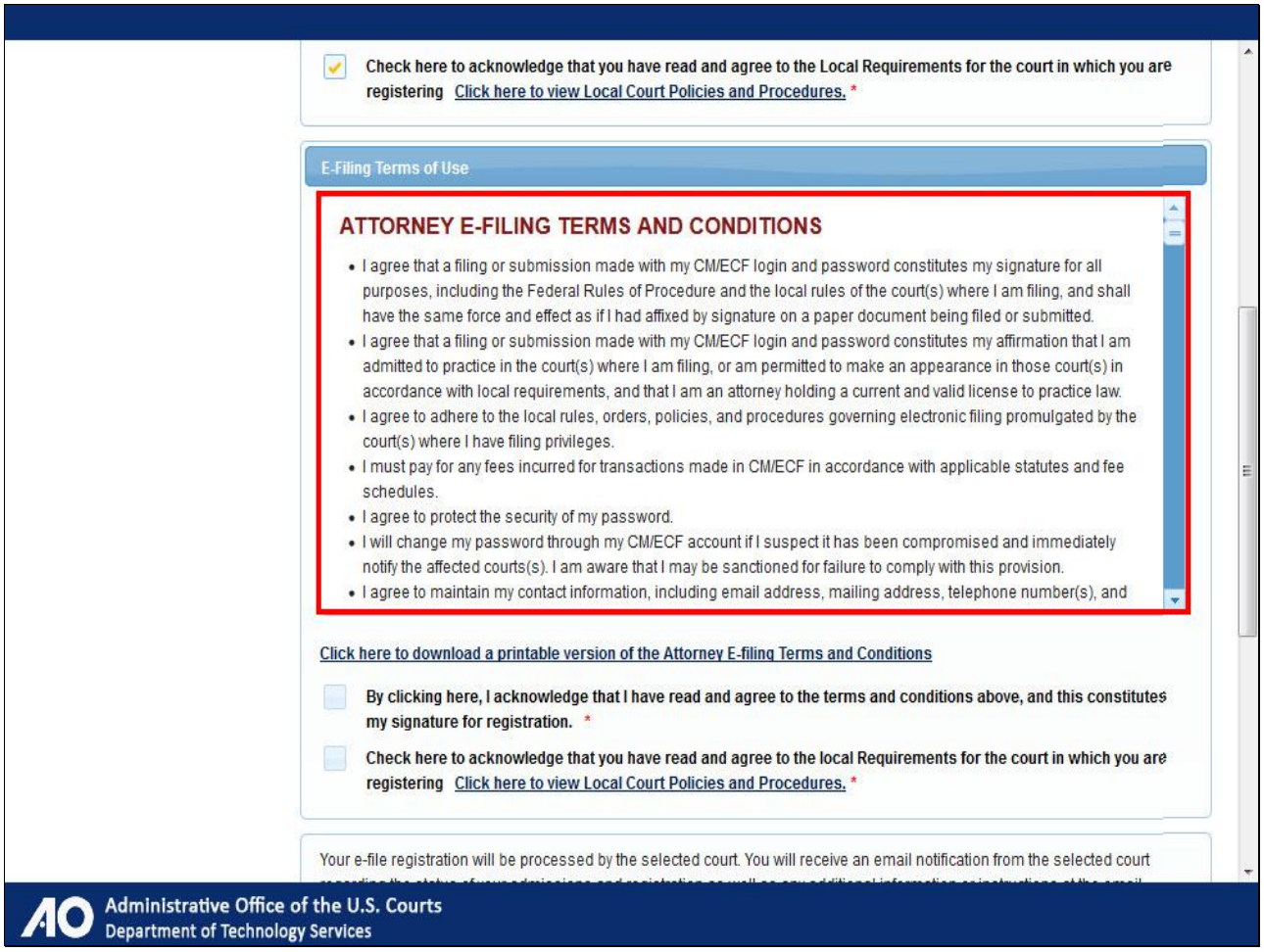
You are now on the last page of your registration. Read the local court policies and procedures...

Slide 82



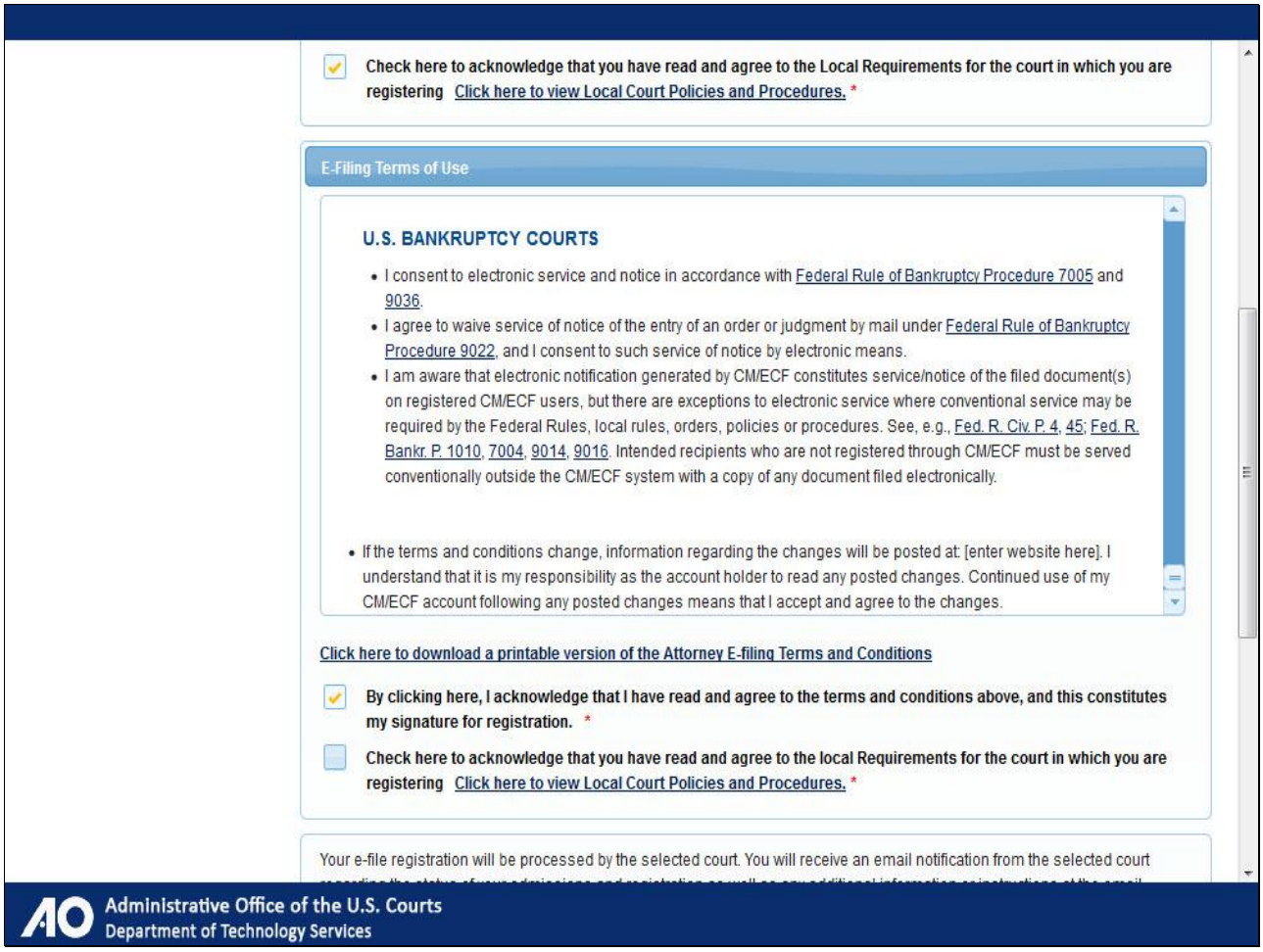
…and select the check box.

Slide 83



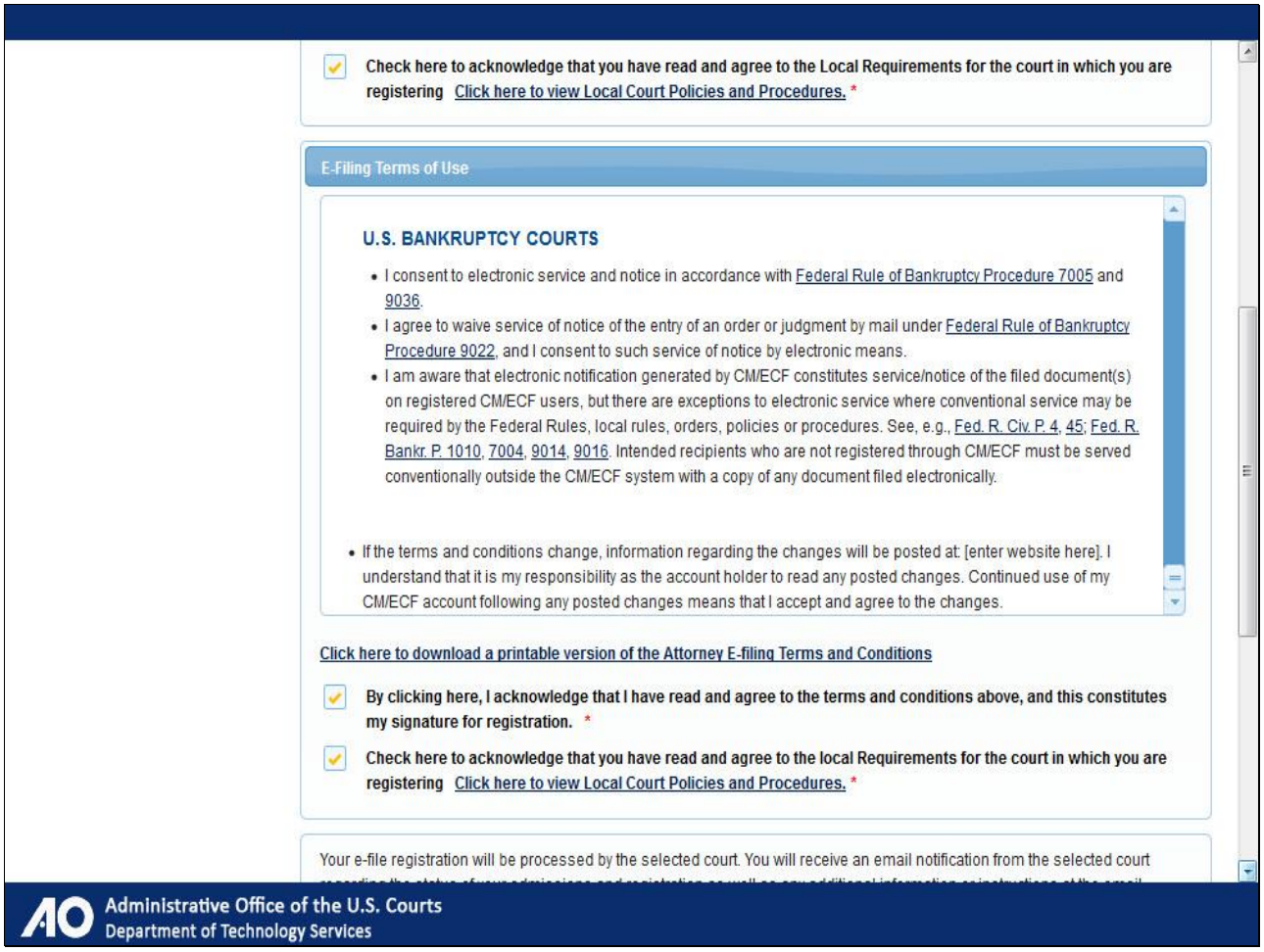
Read the attorney e-filing terms of use...

Slide 84



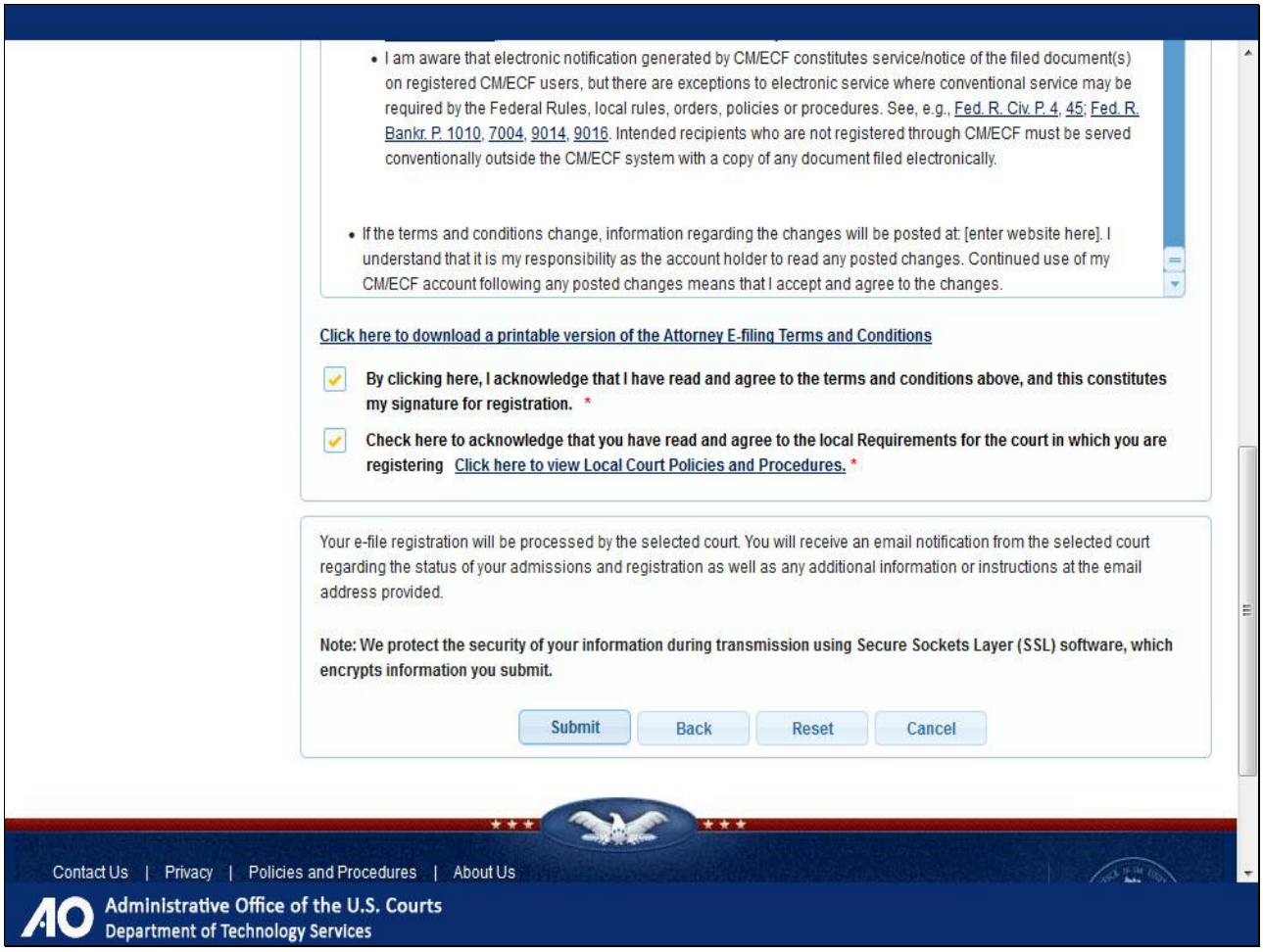
...and select the acknowledgment check boxes.

Slide 85



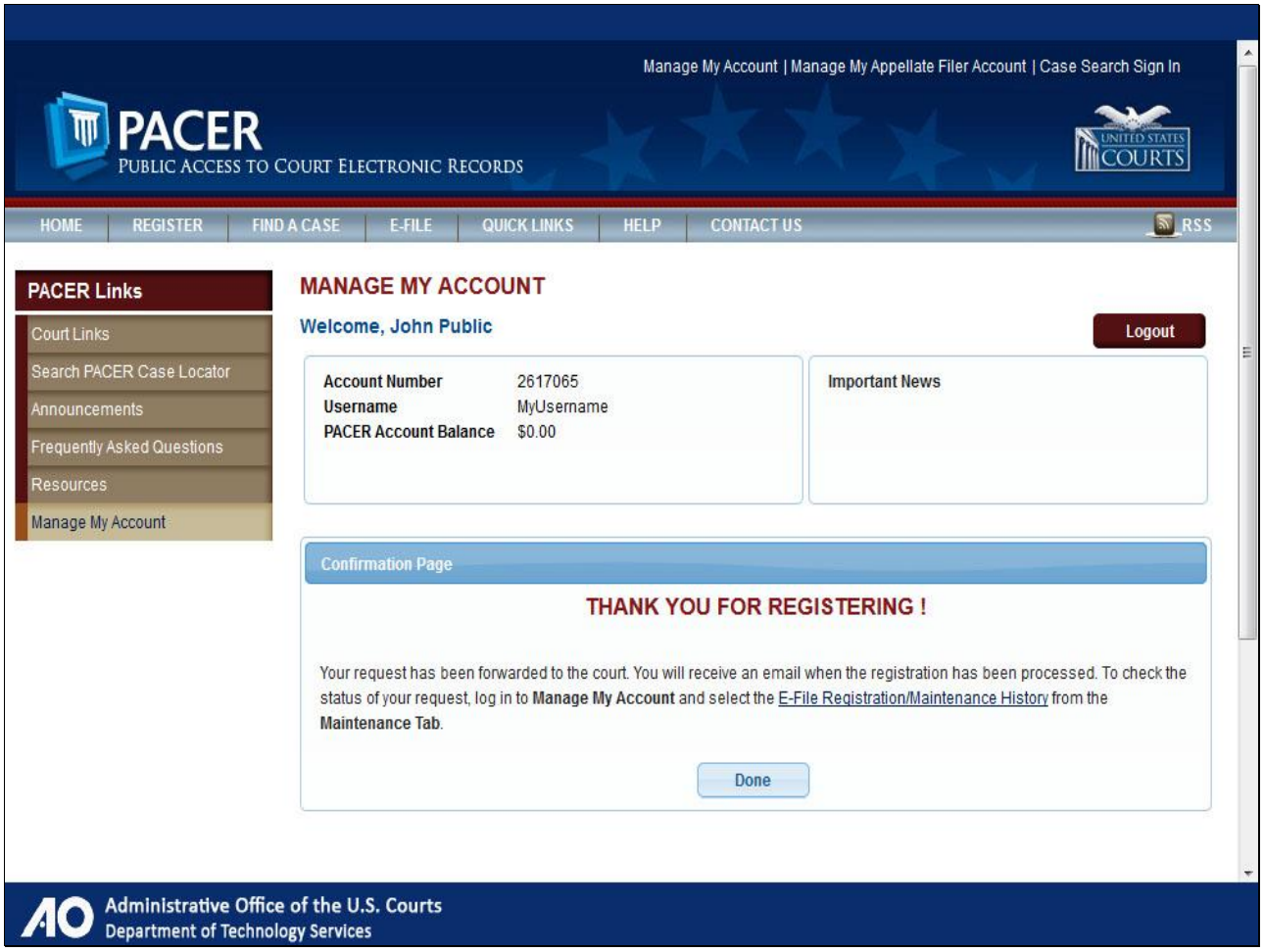
Scroll down to the bottom of the page.

Slide 86



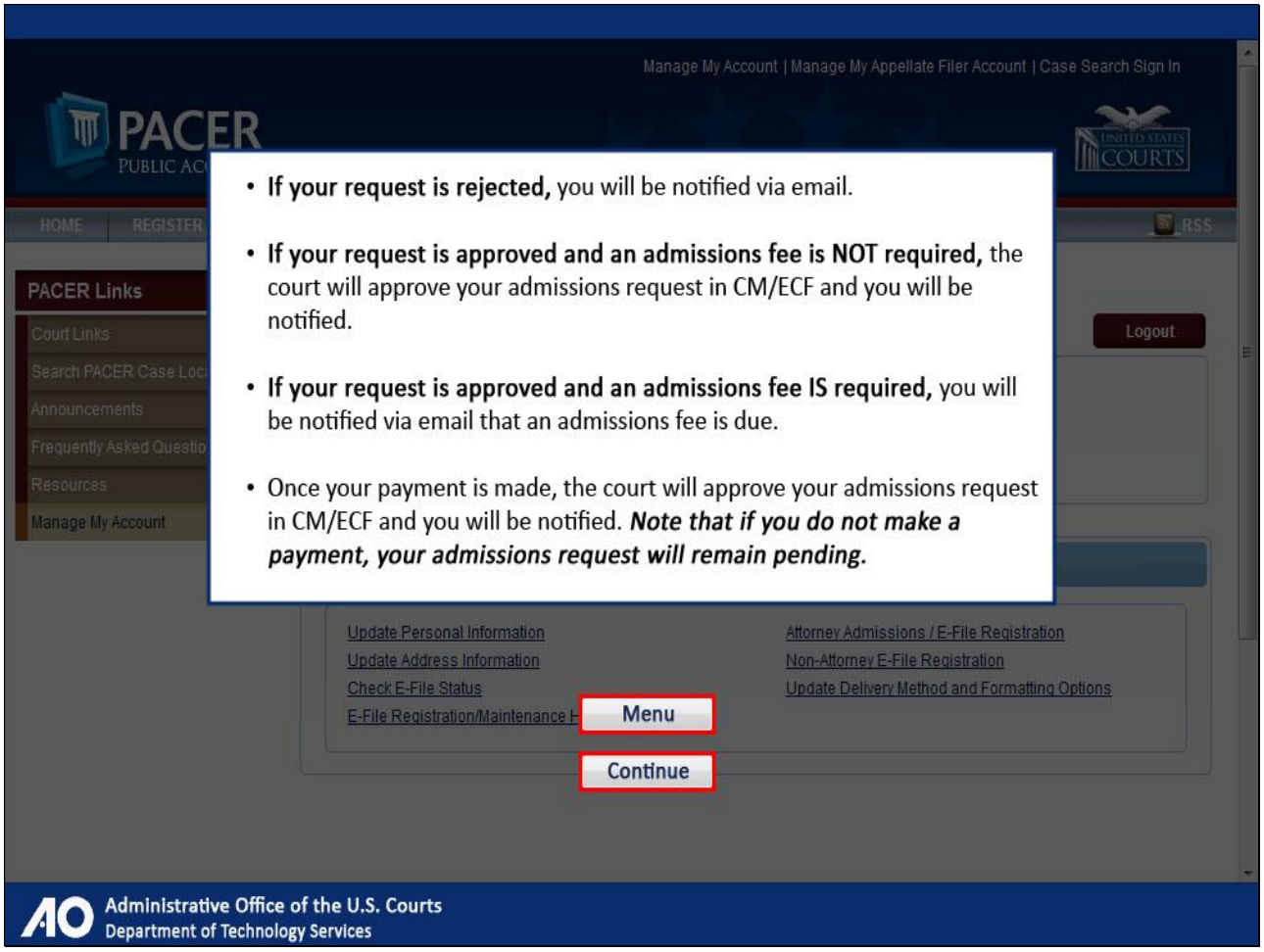
And click Submit.

Slide 87



Congratulations! You have successfully registered with your court. Your e-file registration will be processed by the court you selected. You will receive an email notification at the email address you provided regarding the status of your admission and registration as well as any additional information or instructions. Click Done.

Slide 88



If your request is rejected, you will be notified via a system-generated email. If your request is approved and an admissions fee is NOT required, the court will approve your admissions request in CM/ECF and you will be notified that the request was approved.

If your request is approved and an admissions fee IS required, you will be sent an email notifying you that an admissions fee is due. The email will include a link to the payment utility in CM/ECF, which will require you to log in using your upgraded PACER account.

Once your payment is made, the court will approve your admissions request in CM/ECF and you will be notified that the request was approved. Note that if you do not make a payment, your admissions request will remain pending.

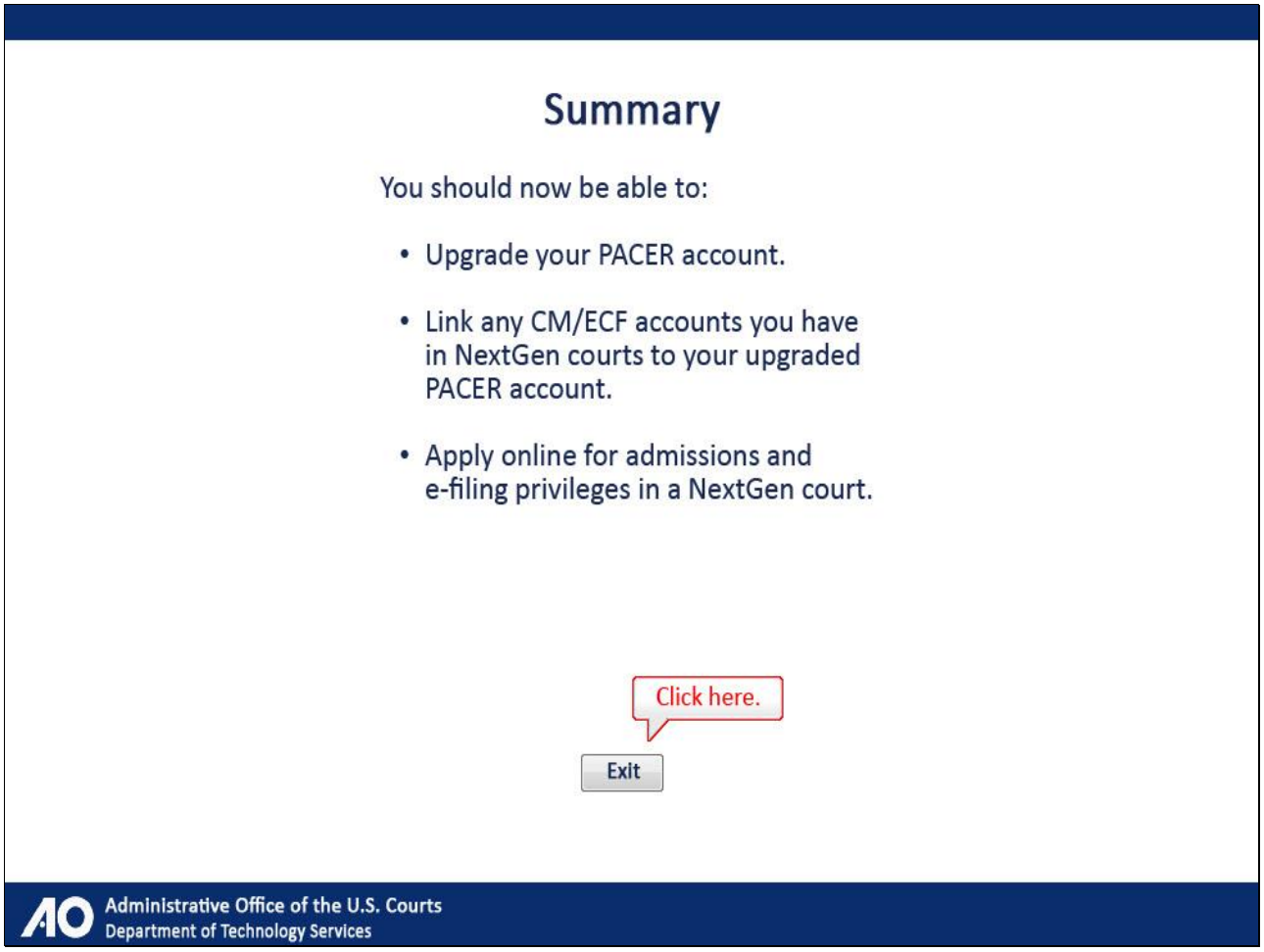
Click Menu to return to the menu options, or click Continue to complete this module.

Note to student:

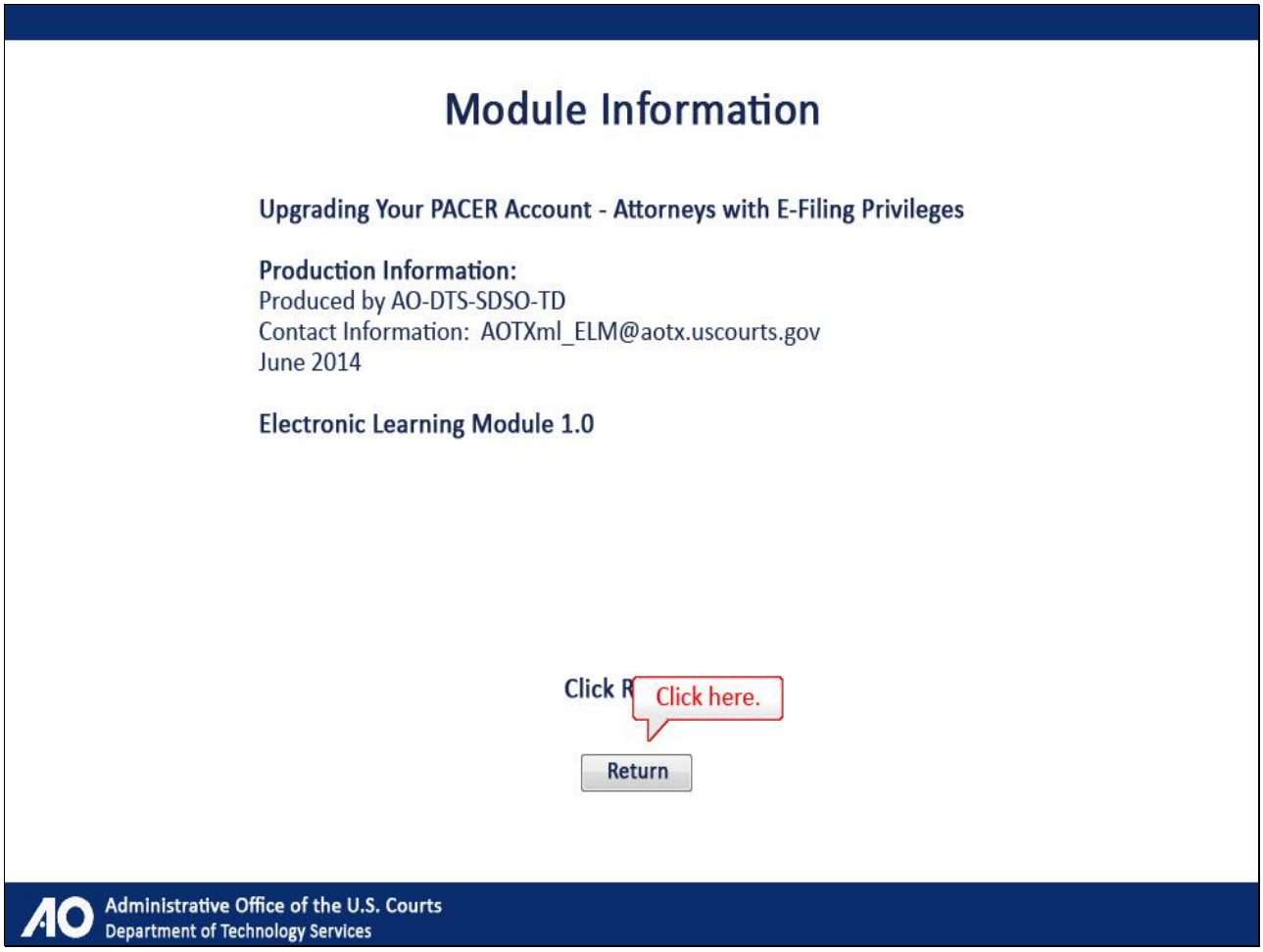
The “Menu” button would take you back to slide 34.

The “Continue” button would take you to slide 89.

Slide 89 - Summary & Exit



Depending on the options you selected, you should now be able to upgrade your PACER account, link any CM/ECF accounts you have in NextGen courts to your upgraded PACER account, and apply online for admissions and e-filing privileges in a NextGen court.

Click Exit to complete this module.

Slide 90 - Module Information