Legal Aid Agency

eForms Quick Guides

eForms User Administration

1. Getting Started

Log into the Online Por choose the Contracted & Administration (CW In the Navigator choose eForms Firm Adminis role.	tal and d Work /A) link. e the strator	Online Applications: <u>Contracted Work & Administration (CWA)</u> Submit Crime Lower, Legal Help Level 1 and 2 cla Online Users and Contacts <u>Management Information (MI)</u> View your Organisation's financial information (Launches in a new window) <u>Electronic Forms (eForms)</u> Complete online forms for - Civil POA	Navigator eForms Author eForms Firm Adr eForms Reviewer	<u>ninistrator</u>
Select Home Page		Navigator CWA Activity Reporter Manager (External) role CWA Designated Signatory (external role) CWA Firm Sysadmin (external role) CWA Office Manager (external role) Forms Firm Administrator	Edit Navigator splaistrator splance	
Then select the Admin ta	ab.	Home Logout Preferences Help Home Admin	Profile Manag	<u>ement</u>
Once in the Admin area, Management menu on th	select User A ne left of the so	ccounts from the Profile creen.	Contact Direct User Accour	<u>story</u> 1ts

2. Add A New User

							time Lo	god. Preferences	this 🗎
							Home	Orders Ad	min [
	Profile Management								
You'll see the existing Online users for your firm.	Firm Details Office Details Contact Directory Diser Accounts	User Accounts					10 1 1		_
		The following people	have active accounts and can access to	le ponal on per	es o lon caub	y Ao	s Supplier User		_
		User Name DEDDIEM NM EV	Email debbis mentiosfite engletion on sk	First Name Dobbia	Niddle Name	Last Name Mustica	Phone Number	Job Title Administrator	ECII
Click Add Supplier User		DEBDIEWONILET	debite montely@eramplemit.co.bk	DADDIA		manual	020/7500000	Aministrator	
		JANEJONES	Jane.jones@examplefim.co.uk	Jane		Jones	020 7759 0000		1
		KARENELLISON	karenellison@examplefirm.co.uk	Karen		Ellison	01273000000		1
		MARKSMITH	mark.smith@examplefirm.co.uk	Mark		Smith			1
Click Add Supplier User.		The following people User Name DEBBIEMUNITLEY JANEJONES KAREMELLISON MARKSMITH	nave active accounts and can access to Emoti debbie muntley@examplefirm.co.uk Jane jones@examplefirm.co.uk karenellison@examplefirm.co.uk mark.smith@examplefirm.co.uk	e ponsi on ben First Name Dabbia Jane Karen Mark	wi of your camp Middle Name	y Add Decision Muntley Jones Ellison Smith	d Supplier User 10007590000 02077590000 02077590000 01273000000	Job Tite Administrator	

3. Enter User Information

Enter the mandatory information about the user.

The username will default to the email address. This can be changed if you wish.

				CORNER IN A	Canada Constant	Lauran Line
				Home	<u>Orders</u>	Admin
Profile Management						
Firm Details	Register a Firm User					
Unice Details Contact Directory User Accounts	 Indicates required field Firm Name Firm Number User Information 				Cancel	Register
	* Email	raiech natel@examplefirm.co.uk	* Phone	020 7759 0000		
	* Usemame	RaieshPatel	Phone Extension			
		By default, the user's email address will be used as their Username for the system	Fax			
	Contact Title		Note			^
	 First Name 	Rajesh]			
	Middle Name					~
	* Last Name	Patel]	Note will be included in the	registration r	notification
	Job Title]			
	User Access					
	Responsibilities					

ome Logout Preferences He

4. Select Responsibilities

Respo	nsibiliti	es	
Selec	t Object	t	
Applic	ations	Electronic Forms (eForms) 💌	
Select	All Se	lect None	
Select	t Respo	nsibility	Application
	eForms	Author	Electronic Fo
	eForms	Firm Administrator	Electronic Fo
	eForms	Reviewer	Electronic Fo

Scroll down to Responsibilities.

Tick the roles you want to give to the new user.

- **eForms Author** for creating and submitting eForms
- eForms Administrator for creating and amending the firm's eForms users
- **eForms Reviewer** for reviewing eForms created by the eForms Author

Details of all eforms roles and responsibilities are available on the link at the bottom of this page.

5. Limiting Access To Offices Within A Firm

Scroll down to Office Restrictions. User Access Restrictions And click Modify Offices. If no Offices are specified, the user will be able to access all the data for this firm Office Restrictions This allows you to restrict this particular user's access to Modify Offices specific offices within your firm. Access not restricted by Office. If you do not apply a restriction, the user will be able to access all offices. Admin: Profile Management: User Accounts > Modify Office Restrictions Select the offices that you want the Modify Office Restrictions user to be able to access and click Cancel Apply Apply. Select All Select None Select Firm Name Description EXAMPLE FIRM 8D411P EXAMPLE FIRM 8D418D

6. Confirming The New User Account

Office Organization Name
Office Örganization Hame
Office Organization Hame
Cancel Register

Scroll down to the bottom of the screen and click **Register**.

A confirmation message will be displayed to confirm that the account has been created.

The new user will receive an automated email containing their username and password and a link to eForms.