



1. The Different eForms Roles



Use the **eForms Author** role if you enter forms data, submit or track eForms.

Use the **eForms Reviewer** role if you track or review eForms, but don't need to enter forms or submit them.

The role allows you to:

- **review** and **print** eForms created by an eForms Author
- **track, view** and **print** previous eForms for your firm or office
- view eForms **messages** sent to colleagues

2. Sending an eForm from an Author to a Reviewer

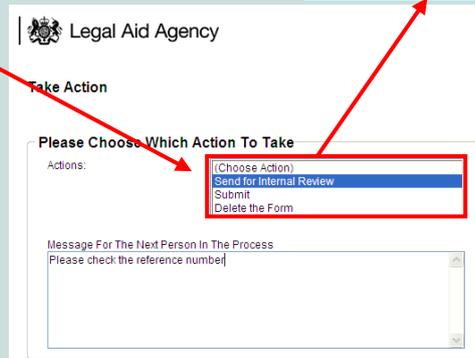
Click **Send To Next Stage** as usual - Once the form is complete you will have the option to send to a colleague for review.



Select **Send for Internal Review**.

Select the name of the **Reviewer** you want to send the eForm to. Please ensure the person is aware a form has been sent to them.

You can also delete erroneous forms at this stage.



3. Picking Up an eForm as Reviewer

USN / Type / Stage	Originator	Now With / Since	Details
2920 : CRM4 Pre-submit Review	Authoronly2 Londonfirm	Revieweronly Londonfirm 18/Feb/2013 09:09	LAA Case Ref = 210112/00 Client Surname = bloggs
3012 : POA Pre-submit Review	Authoronly2 Londonfirm	Revieweronly Londonfirm 19/Feb/2013 12:20	LAA Case Ref = JQBIQGEI7U55/AZ/21 Client Surname = smith
3013 : POA Pre-submit Review	Authoronly2 Londonfirm	Revieweronly Londonfirm 19/Feb/2013 12:38	LAA Case Ref = JQBIQGEI7U55/AZ/21 Client Surname = jones

eForms referred to you for review will be in your **In Tray**.

Click the **USN/Type/Stage** link to view the form. All of these form are at the Pre-Submit Review stage.

The **Originator** is the person that created the form.

4. Making Your Review Decision

From the eForm, click

Send to Next Stage

You now have 2 options:

1. **Submit** the eForm to the LAA, or
2. **Return To Originator**

You can also write a message for the next person in the process.

Legal Aid Agency

Take Action

Please Choose Which Action To Take

Actions:

- (Choose Action)
- Submit
- Return To Originator

Message For The Next Person In The Process

Yes this is fine

Copy Message From Previous Stage

OK Cancel

5. Viewing Colleagues' Messages as Reviewer

From the main eForms screen click **Administration**.

Choose whose messages you want to review and click **View Messages**.

Selecting **Close** will return you to the administration options and selecting **Close** once more will allow you to view your own messages again.

Accessibility Help

Administration Close

Records per page 20

Search Details For: Go

Legal Aid Agency

Administration Options

Items marked * must be completed

Accessibility Help

Please select the user whose messages you wish to view.

* User

View Messages

Close

6. Tracking eForms as Reviewer

USN / Type / Stage	Originated / By	Now With / Since
1640 : POA Pre-submit Review	11/Jun/2010 15:24 Elena Oklon	Jan Rayner 11/Jun/2010 15:28

If an eForm's status shows as **Pre-submit Review** it means that the eForm is with a colleague and hasn't yet been submitted to the LAA

The **Originated By** and **Now With** column tells you who started the form and who it is awaiting action from.