

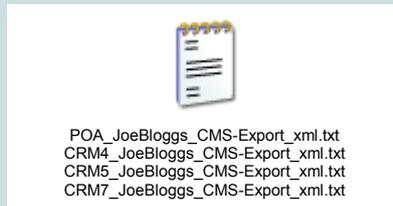


Uploading From A Case Management System

1. Exporting From a Case Management System

Some **Case Management Systems (CMS)** are able to export case information that can be uploaded into eForms, which will reduce duplicating information for solicitors and the LAA.

Please contact your CMS provider regarding compatibility with the eForms system and guidance regarding the creation of the eforms export file.

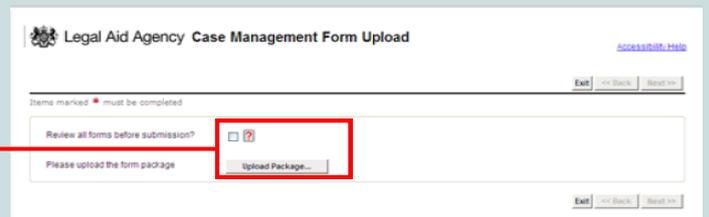
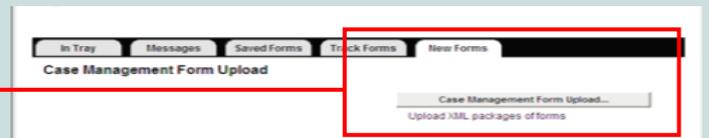


2. Uploading XML Packages

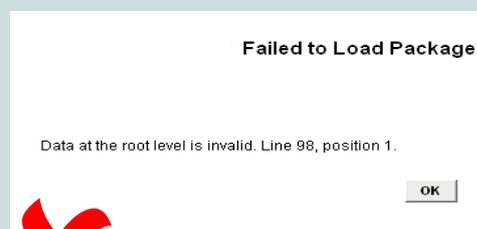
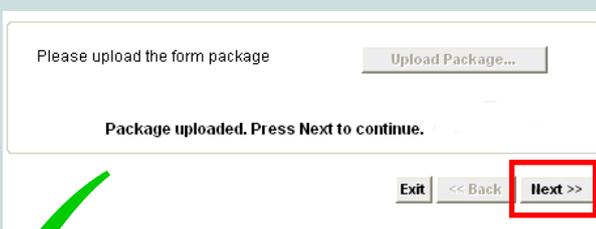
Open the **New Forms** tab and select **Case Management Form Upload**. (You must have the eForms Author or Administrator roles to upload CMS files into eForms)

The review all forms box has been ticked for your convenience, this will allow you to review, amend and attach any relevant supporting documents prior to submission.

Click **Upload Package**, then browse for your **CMS** file.



3. Upload Results



4A. Reviewing Forms before Submission

The LAA recommend you review all bulk-loads before submission. At that stage you can also attach any additional information or print coversheets for information sent by post.

Click **Start Submission**.

If you are an advanced crime users and no additional information is required, you can un-tick this box and rely upon direct submission with no review.

Review all forms before submission?



Items marked * must be completed

No.	Case Ref.	Type	Outcome
1	130410012	POA	

Confirm the contents of the package and then submit them into the system.

Start Submission

4B. Reviewing Forms before Submission

If the **Review all forms before submission** box is *ticked* then the Package Contents will indicate in Outcome, that you can view your form in the Saved Forms tab (for assistance with saved forms please see the 'Submitting an eForm' Quick Guide).

From the Saved Forms tab you can attach any supporting information and make amendments before submitting the final application. (if your forms not instantly visible, press the refresh button)

Click **Upload Package**, then browse for the file that your CMS has created.

Items marked * must be completed

No.	Case Ref.	Type	Outcome
1	130410012	POA	Form saved for review in NONLON1's Saved Forms.

The package submission was performed successfully.

If the '**Review all forms before submission**' box is **NOT** *ticked* and there are **no errors** then the Package Contents will indicate the form has been *Imported Successfully*, completing your submission. If there are errors, please see section 5.

Items marked * must be completed

No.	Case Ref.	Type	Outcome
1	130410012	POA	Imported Successfully

The package submission was performed successfully.

5. Fixings Submission Errors

If there are errors with the upload you will receive an error message.

Click on **OK**, to view the errors within the **Package Contents** section. Then go to **Saved Forms** to resolve the issues.

Errors On The Form

The following form sections have errors which need to be corrected:

- Details

Click OK to go to the first of these sections.

OK

Legal Aid Agency Case Management Form Upload

Items marked * must be completed

No.	Case Ref.	Type	Outcome
1	99999/111	CDS4	Failed to load xml: The date supplied for field 'Client_dob' is not in a valid format.

There were errors during the submission process. See the results in the table above.

6. POA Errors - Example

Errors on the form are indicated with 

To view and amend the error click 

Once all errors are resolved and you have added any required documents or printed the cover sheet.

Then you can then click **Send to Next Stage** and complete your submission as usual.

Error: Some values on the page are incorrect. They are marked with !

Items marked * must be completed

* Contact Name: AuthorAdminReviewer1 Nonlonfir ?

* Contact Phone: 01206 561561 ?

* Contact Email: fiona1@solicitors.com ?

Account No.: 2N1350

Is this a unified claim for public law Children Act proceedings? Yes No ?

Line	LSC Ref	Name	D.O.B	Reason	Your Ref	Prov. Acc No	Net	VAT Rate	VAT	Total	Fixed Fee	Summary
1		JOE BLOGGS	5/2/1985	B	LAW/SS267/02	2N135Q	£3,956.19	20	£791.24	£4,747.43		

Net Total: £3,956.19 | VAT Total: £791.24 | Total: £4,747.43

Certification

* Date: 1 11 Year 2012 23 ?

* Name: NONLON1 ?

Important: When the form is ready for submission to Legal Services Commission, please click Send to Next Stage

Print Template **Send to Next Stage** Save Exit

7a. Crime Errors - Example

This particular crime error example relates to a field on a CRM4 application that was not populated correctly during the upload.

Click on **OK**, to view the outcome in **Package Contents**

Then go to **Saved Forms** to resolve the issue.

Errors On The Form

The following form sections have errors which need to be corrected:

- Details

Click OK to go to the first of these sections.

OK

Items marked * must be completed

No.	Case Ref.	Type	Outcome
1	130410/012	CRM4	Imported with errors. Available for correction in provuserlogin0002's Saved Forms

There were errors during the submission process. See the results in the table above.

Exit << Back Next >>

7b. Crime Errors - Example

Legal Aid Agency CRM4 : Application for Prior Authority to Incur Disbursements in Criminal Cases

Prior Authority cannot be granted for less than £100.

Items marked * must be completed

Applications for prior authority can not be less than £100.00 (exclusive of VAT)

For guidance relating to Prior Authorities please see the [Standard Crime Contract 2010: SS-23](#)

For guidance relating to Prior Authorities please see section 4 of the [submitting Bills Assessment Manual](#)

* Is the total authority for which you are applying more than or equal to £100?
 Yes No

* Is your application in relation to a Post Mortem examination?
 Yes No ?

Print Template Spell Check **Send to Next Stage** Save Exit << Back Next >>

Open the eForm from the **Saved Forms** tab.

For this particular error, the CRM4 application must be for over £100 or the application cannot be granted.

Once the errors are resolved, click **Send to Next Stage** to proceed.