eForms Quick Guides

CRM14 - Reassigning a CRM14 Form

Legal Aid Agency

General Notes

- The information below to be used when you want to reassign a fee earners **Name** on a CRM14 eform application before submitting to the LAA.
- Only a user with the eforms administrator role can change a fee earners **Name**.
- The reassigning of a fee earners **Name** can only be completed if the application has NOT been submitted.
- Once reassigned only the fee earner named on the form can access the form.
- The fee earner named on the form requires the eforms **Author** role assigned to them in order to submit the application.
- You can NOT reassign a fee earner on the form if the application is being actively worked on.

1. Search for a (Saved) CRM14 form in Tracked Forms

Once the CRM14 form is completed ensure that it is saved.

An eforms administrator can search for a saved eform via the **Tracked Forms** tab.

There are **3** options when searching in eforms, either choose:

1. Track forms you created
2. Track any form - using a variety of search criteria
3. Track specific form - using the **USN** number *(recommended)*

2. Reassigning a CRM14 Form

Use the **USN** number to search for the specific form.

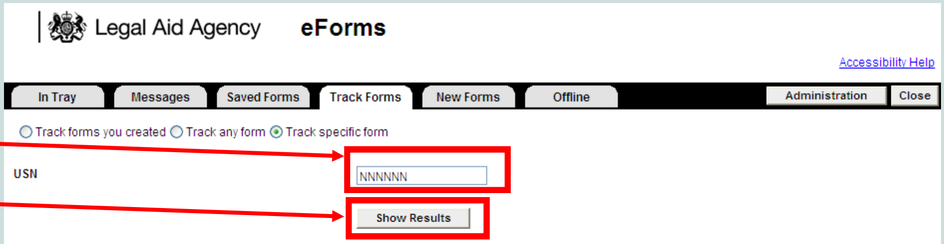
'Click' on **Show Results** button.

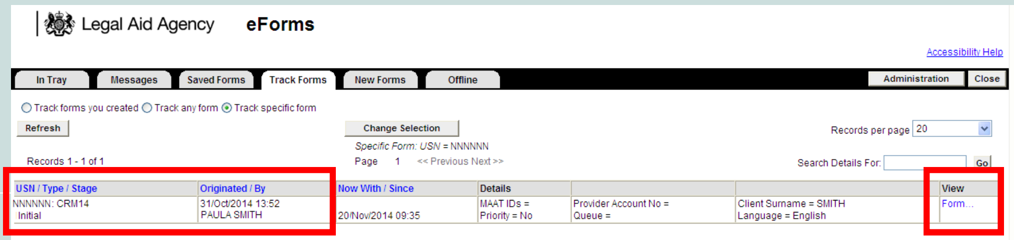
The Saved form will show status **Initial** (*if the form has not been previously reassigned*), it will also show the originator of the form.

Click on the **Form…**link in View column.

Note: If searching via **Track any Form** and you include:
- completed forms (excluded form box unchecked)
- Saved Forms
- Submitted forms awaiting Processing
- Returned/Reassigned forms

For further information on **Track Forms** - see quick guide **eforms - using TAB's**





NOTE: USN/Type/Stage

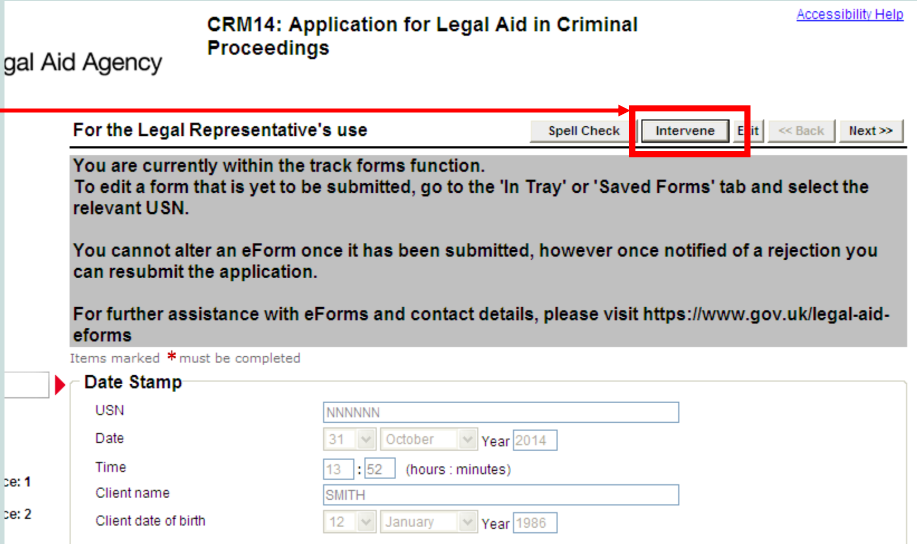
- CRM14 form with status **Initial** has been started and saved but not yet submitted.
- CRM14 form with status **Caseworker Received** has been submitted to the LAA.
- CRM14 form with status **Returned or Reassigned** has had the contact details changed by an eforms System Administrator or Returned (rejected) by the LAA.

3a. Reassigning a CRM14 Form - Intervene button

...After clicking on the Form link in the View column, the form will open in the track forms.

'Click' on the **Intervene** button.

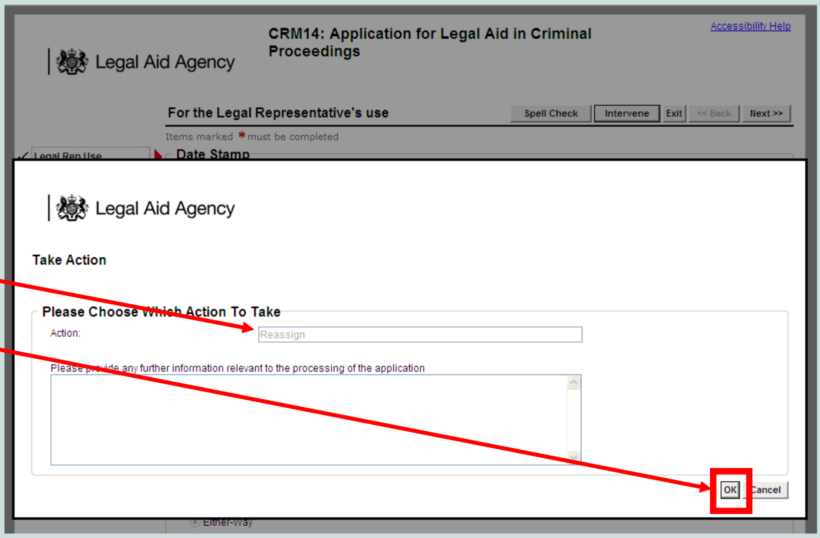
NOTE: Notifications on the page will **warn**! that you are in the tracked forms function - unable to make changes to the form and provides
contact details if help is required.



3b. Using the Intervene button

You will be presented with a **Take Action** page.

Reassign will be the default action 'Click' on **OK**….



3c. Using the Intervene button

...All eform registered users of the firm will appear in a list.

'Click' on ▶ to choose the user name you want to appear on the CRM14 form.

NOTE: If the name you want to assign, does not appear on the list, then they have NOT been registered to access eforms for your office.

You / the eforms Administrator can register users for eforms via CWA - see quick guide
'**Registering a new user**'

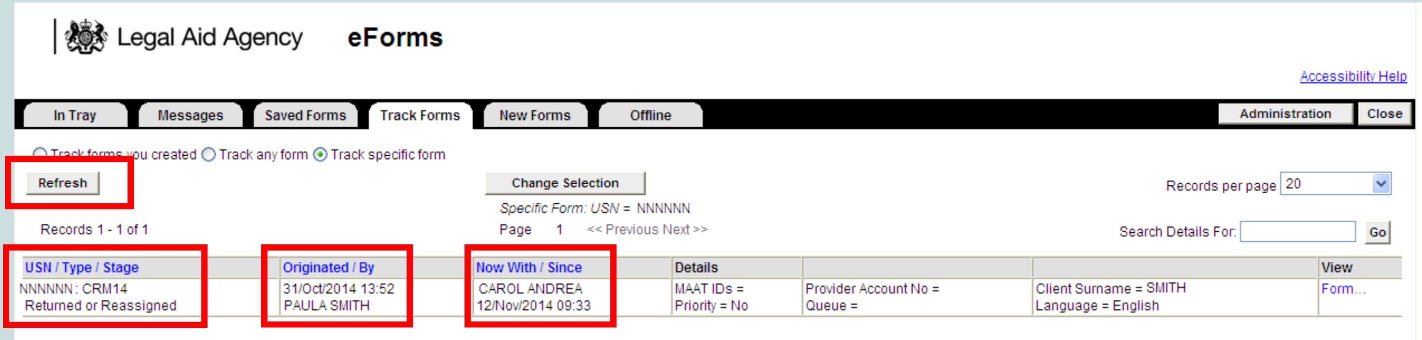
The **Customer Services Team** can also assist if required.

3d. Using the Intervene button

...A confirmation that the form has been reassigned should appear.

‘Click’ on **OK**….

4. Viewing Reassigned Form



After reassigning a form you will be taken back to **Track Forms** - *Track specific form*.

‘click’ on the **Refresh** button - results will now show the form as:

USN/Type/Stage - Returned or Reassigned
Originated / By - User whom created the form
Now With / Since - User the form is now with

The eforms User the form has been reassigned, will find the form in the eforms TAB - **InTray.**

NOTE: If the reassigned form is not found in **InTray** - *the form may have been opened and saved after being previously searched for in the InTray*, the form will therefore now be found in **Saved Forms** - *Other forms you are working on.*

The Originator of the form will NOT receive **notifications** / **messages** and will NOT be able to make changes to the form, but will have the option to track the form if they have the Administrator or Reviewer role assigned.

If you require further information on navigating eforms TAB’s - see the quick guide **eforms - using TAB’s** at *www.gov.uk/legal-aid-eforms.*

Contact the Customer Services Team if you require further assistance.