

Sign in to legal aid services: How-to guides for **External LAA users**

This document contains user guides for processes being requested of all external users leading up to restoration of the LAA Portal service.

Further user guides will follow, including any different or extra processes required as the service moves from restoration into BAU.

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6	Set up and manage user access	LAA Admins
		 Provider admins (at contracted providers
8	Activate your Legal Aid Agency (LAA)	 Provider admins (at contracted
	Service administrator account	providers
9	Activate your Sign in to legal aid	 Contracted providers
	services account	 3rd parties working on behalf of
		contracted providers
11	Registering for and activating a Sign in	 3rd parties working on behalf of
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12	Verify new users in your firm	Compliance officers (or other point
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13	Switching between firms if you work on	 3rd parties working on behalf of
	behalf of more than one	contracted providers

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Guide 6: Setting up and managing user access

For users: Provider admins, LAA Online Support Team, Provider Records team

[H1] Set up and manage user access

[H2] Set up and manage user access

Once a user account has been created in Sign in to legal aid services, you will need to set up and manage access for that user for:

- · the services they can use
- the roles they need within these services
- the offices they are attached to

You will only be able to set up and manage user access if a user account has been created.

What you need to do

In the service, select Manage your users. In the Status column you will see either 'incomplete' or 'complete'.

Incomplete

This means the user permissions have not been set, and the user has not activated the account.

Complete

This means user permissions have been added, and the user has activated the account.

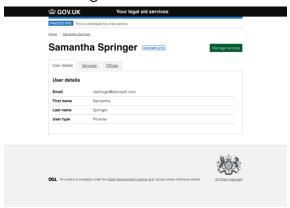
To set up a user's access, you can either select a user that has a status of Incomplete, or you can search for a specific user. You can search by firm name or code, or by the user's name or email address.

To set up access follow the steps below.

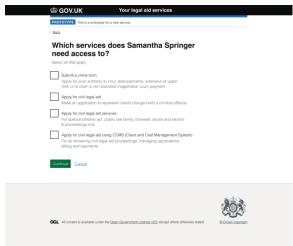
1. Select the user's name to access the user details screen.



2. Select Manage access on the user details screen and continue.



3. Select all the services the user will need access to and continue.



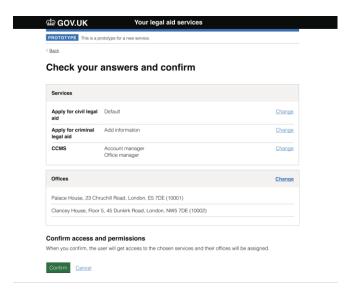
4. Select the roles this user will need for each service and continue.



5. Select which of the firm's offices they are attached to (if applicable).



6. Check your answers and confirm.



You will see a confirmation page showing which services, roles, and offices you have set up for this user.

You will need to notify the user that their access has been set up.

Manage user access

You can manage a user's access, such as changing which services they can use, which roles they have in a service, or which offices they are attached to.

To do this you should follow the same process as setting up access through Manage your users.

Note that users that have already had their access set up will have a status of COMPLETED in the status column.

For the first release of Your legal aid services, only 2 services will be available for providers

- Apply for criminal legal aid
- Submit a crime form

Other services will be added in the coming months.

Note: You cannot change a user's name. If you need to do this you must contact support.

Deleting or removing users

It is the responsibility of the of the provider to ensure the maintenance of accurate and up-to-date user account records. When a user account is no longer required—whether

due to a change in role, departure from the organisation, or any other reason access must be revoked, and the user account closed.

There is currently no functionality available to delete or remove a user from the system. Therefore if there is a need to delete or remove a user, you can remove all the roles and permissions associated with that user via Manage your users.

This will disable the user's access to the system without deleting their account.

Once this action is complete and if a user is going on an extended period of leave, for example maternity leave or long-term sickness, you must inform your firm's Contract Manager.

Contacting support

Provider admins should contact the LAA Online Support team:

- telephone on 0300 200 2020 (option 3)
- email <u>online-support@justice.gov.uk</u>.

Guide 8: For Provider admins to activate their account

For users: Provider admins

[H1] Activate your Legal Aid Agency (LAA) Service administrator account

To access your Sign in to legal aid services administrator account you must:

- activate your account
- set up multi-factor authentication (MFA)

Once you have completed these steps you will be able to sign in whenever you need to use the Service.

How to activate your account

Your firm should have completed a validation process and nominated you as a Provider admin.

When this has been completed you will receive an email from LAA Online Services with the title 'Sign in to legal aid services – activate your account'.

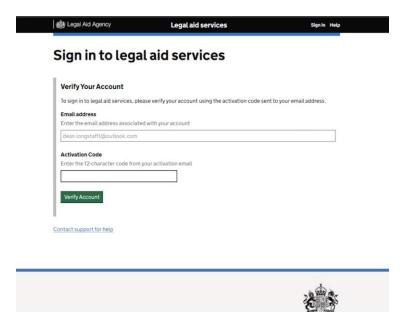
This email will include your account activation, details which will be:

- your email address
- an activation code

You should try to activate your account as soon as you get the email, as the activation code will expire after 30 days.

Select the 'Activate my account' link in the email. This will take you to the Sign in to legal aid services screen.

Select the 'Activate my account' button. On the next screen check the email address is correct, then enter the activation code from the email you received.



You will be directed to a Microsoft screen where you will need to accept the permissions and select Next.

You will then see a screen asking for more information. Select Next and you will be asked to set up multi-factor authentication (MFA).

How to set up MFA

After you have activated your account, you will be asked to set up MFA. MFA means you will have to confirm it's you every time you sign in to the service. This is to ensure your account is kept secure.

Follow the steps below:

- 1. You will be asked to download the Microsoft Authenticator app on to your phone if you don't have it already. There are other ways to authenticate your account, but we recommend using the Microsoft Authenticator app.
- 2. In the app you will need to add Sign in to legal aid services as an account by following the onscreen instructions.
- 3. Once you have set up MFA you will be asked to authenticate via the app.

You can now sign in to the service. On the home screen you will see the Services that you have been granted access to.

For the first release, only 2 services will be available:

- Apply for criminal legal aid
- Submit a crime form

Others will be added in the coming months.

Guide 9: For other external users to activate their account (not Provider admins)

For users: Contracted providers

[H1] Activate your Sign in to legal aid services account

To access Your Sign in to legal aid services account you must:

- activate your account
- set up multi-factor authentication (MFA)

Once you have completed these steps you will be able to sign in whenever you need to use the service.

How to activate your account

Your firm should have completed a validation process and requested an account for you.

When this has been completed you will receive an email from LAA Online Services with the title 'Sign in to legal aid services – activate your account'.

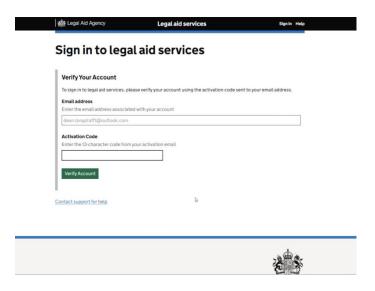
This email will include your account activation, details which will be:

- your email address
- an activation code

You should try to activate your account as soon as you get the email, as the activation code will expire after 30 days.

Select the 'Activate my account' link in the email. This will take you to the Sign in to legal aid services screen.

Select the 'Activate my account' button. On the next screen check the email address is correct, then enter the activation code from the email you received.



You will be directed to a Microsoft screen where you will need to accept the permissions and select Next.

You will then see a screen asking for more information. Select Next and you will be asked to set up multi-factor authentication (MFA).

How to set up MFA

After you have activated your account, you will be asked to set up MFA. MFA means you will have to confirm it's you every time you sign in to the service. This is to ensure your account is kept secure.

Follow the steps below:

- 1. You will be asked to download the Microsoft Authenticator app on to your phone if you don't have it already. There are other ways to authenticate your account, but we recommend using the Microsoft Authenticator app.
- 2. In the app you will need to add Your legal aid services as an account by following the onscreen instructions.
- 3. Once you have set up MFA you will be asked to authenticate via the app.

You can now sign in to the service. On the home screen you will see the services that you have been granted access to.

For the first release, only 2 services will be available:

- Apply for criminal legal aid
- Submit a crime form

Others will be added in the coming months.

Guide 11: Registering for an account as a sub-contractor (e.g. Cost professional)

For users: 3rd parties working on behalf of contracted providers

[H1] Registering for and activating a Sign in to legal aid services account as a sub-contractor for a firm

Overview

All users of Sign in to legal aid services must be verified by a firm they work with before registering and activating their accounts. This includes sub-contractors providing services for a firm, such as cost professionals, barristers and their clerks of chambers.

If you qualify as a sub-contractor, you will need to notify the Provider admin in every firm you work for that you need an account.

The Provider admin must have verified that you are a legitimate sub-contractor and included you on a list of users submitted to the Legal Aid Agency.

You will need a unique firm email address and a separate account for every firm you work for, so make sure you have requested accounts with each one.

Once the Provider admin has requested your account you will need to:

- activate your account
- set up multi-factor authentication (MFA)

Once you have completed these steps you will be able to sign in whenever you need to use the service.

How to activate your account

Each firm you work with should have completed a validation process and requested an account for you.

When this has been completed you will receive an email from LAA Online Services with the title 'Sign in to legal aid services – activate your account'.

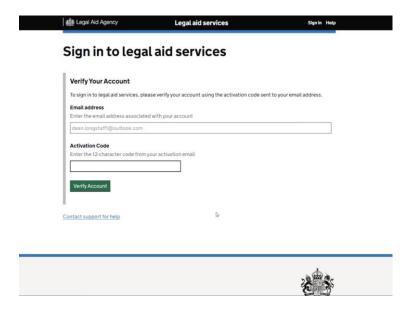
This email will include your account activation, details which will be:

- your email address
- an activation code

You should try to activate your account as soon as you get the email, as the activation code will expire after 30 days.

Select the 'Activate my account' link in the email. This will take you to the Sign in to legal aid services screen.

Select the 'Activate my account' button. On the next screen check the email address is correct, then enter the activation code from the email you received.



You will be directed to a Microsoft screen where you will need to accept the permissions and select Next. You will then see a screen asking for more information. Select Next and you will be asked to set up multi-factor authentication (MFA).

How to set up MFA

After you have activated your account, you will be asked to set up MFA. MFA means you will have to confirm it's you every time you sign in to the service. This is to ensure your account is kept secure.

Follow the steps below:

- 1. You will be asked to download the Microsoft Authenticator app on to your phone if you don't have it already. There are other ways to authenticate your account, but the Microsoft Authenticator app has been set as the default.
- 2. In the app you will need to add Your legal aid services as an account by following the onscreen instructions.
- 3. Once you have set up MFA you will be asked to authenticate via the app.

You can now sign in to the service. On the home screen you will see the Services that you have been granted access to.

For the first release, only 2 services will be available:

Apply for criminal legal aid

• Submit a crime form

Others will be added in the coming months.

Guide 12: Verifying service users in provider firms

User - external: Compliance officer or other lead contact at provider firms

[H1] Verify new users in your firm

Overview

All users of Sign in to legal aid services must be verified by the firm they work for before an account is created for them.

As the compliance officer for your firm, you will need to submit the following documents:

- an organogram with the names, email addresses, and roles of all users who need access to the service
- a signed declaration that every user on the organogram has been verified by your firm

Completing the organogram and declaration

You will be emailed an organogram template and a declaration by an LAA representative.

Fill in the organogram with:

- the name of the firm
- the name of the person filling in the form (your name)
- the date the form has been filled in

Then, for each person needing an account you should enter:

- first name
- last name
- email address
- if they are to be a Provider admin
- sub-contractor firm name if the person is a cost professional, an independent barrister or other 3rd party provider

Next you should complete the declaration form.

Once you are happy you have completed both documents, email them to your LAA representative.

They may request further information or clarification from you.

Once all information has been validated, new accounts will be created for all the users you have provided and they will receive an email asking them to activate their account.

Guide 13: Sub-contractors switching between firms (e.g. Cost professionals or Barristers)

For users: 3rd parties working on behalf of contracted providers

[H1] Switching between firms (if you work on behalf of more than one firm)

Overview

If you work on behalf of more than one firm, you may need to switch between them while using Sign in to legal aid services.

To do this you must first have a firm email and an account for each firm you work for.

Find out more about how to get an account.

You will need to sign in to each firm account individually. If you need to switch firms you will need to log out of the firm account you are in, and sign in using the account name and password for the firm you need to switch to.