



This guide shows you how to create someone as a Fee earner or Supervisor in CCMS. Only a user with the CCMS Firm Administrator can complete this activity.

In CCMS, you can choose from a drop down list of Fee Earners/Supervisors to assign them to a case. Following the steps in this document allow you to add someone to the list that appears in the drop-down.

There are two parts to this process:

1. Create a contact
2. Apply a practitioner type to that contact.

Information on Fee Earners/Supervisors can be used by you and the LAA to monitor the cases an individual is assigned to.

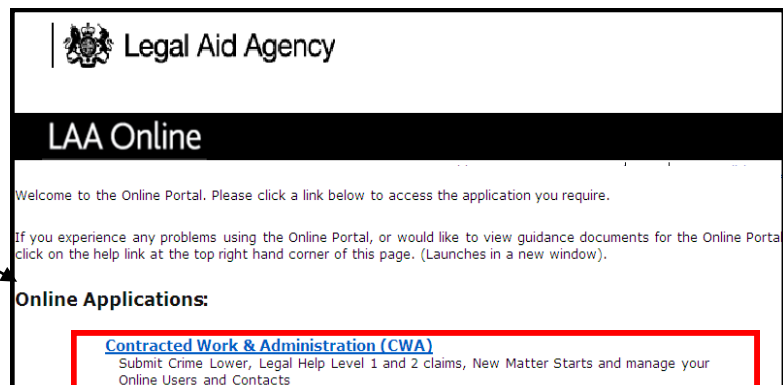
1

Log in to the LAA Online portal (for help doing this, see the 'Logging in' quick guide).

Click on the '**Contracted Work & Administration**' link on your list of applications.

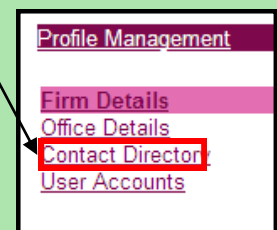
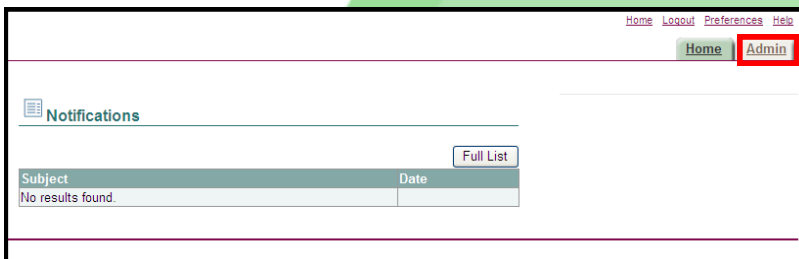
In the CWA Navigator, click '**CCMS Firm Administrator**'.

Note: If you only have one role assigned to your username, you may not see the Navigator screen and will continue to step 2.



2

Select the '**Admin**' tab on the top right hand corner of the screen. Then choose '**Contact Directory**' from the menu provided.



'**Contact Directory**' displays all existing contacts under your account.

Your firm is set up with one contact automatically, so there will be at least one contact visible in the directory. This is usually your Firm Administrator.



3

Home Logout Preferences Help

Home Admin

Profile Management

Firm Details
Office Details
Contact Directory
User Accounts

Add

Name ▲	Email	Phone	Primary Contact	Remove	Manage Office Details	Edit
Jack Black	jack.black@legal.co.uk	0203-322 1221	Y			

Check whether your contact already exists. If not, click 'Add' to begin creating a new contact.

Note: If your contact does exist, you can click the edit button next to them and skip to step 5.

4

In the 'Add Contact' screen, enter the required information (indicated by an asterisk).

Admin: Profile Management: Contact Directory > Add Contact

Add Contact

* Indicates required field

Cancel Apply

Contact Title Mr. ▼

* First Name Jack

Middle Name

* Last Name Black

Job Title

* Email Address jack.black@legal.co.uk

* Phone Area Code 0203

* Phone Number 322 1221

Phone Extension

Fax Area Code

Fax Number

Practitioner Type **Qualified Solicitor** ▼

* Practitioner Number 123453

* Start Date 20-Nov-2012

End Date

Reason For End Date ▼

Create User Account for this Contact ?

5

Now you need to add the **Practitioner Type**.

You **must** do this to ensure that the contact appears on the lists of fee earners/supervisors for your firm. **Please note that this also applies to Chartered Legal Executives.**

Choose 'Qualified Solicitor' from the drop down list. Fill out the mandatory fields that now appear below 'Practitioner Type'. 'Start Date' will be today's date.

Click 'Apply' to save the contact.



6

You will proceed to the **'Manage Office Details'** screen. Tick the box next to the main office the contact is based at.

IMPORTANT : You must only tick **one** box, even if the contact works at more than one office.

Ticking more than one box may mean you need to recreate the contact.

Manage Office Details

Manage Office Details: John Smith

Link the contact to the appropriate offices for your company.

Addresses

Select Offices:

[Select All](#) | [Select None](#)

Select LSC Account Number	Address Details
<input checked="" type="checkbox"/> 0A123B	14 CINDER LANE NEWCASTLE N22 4AP

7

Click **'Add Link to Contact and Continue.'** The process is now complete.

Note: If you are amending an existing contact, they should already be linked to an office and you will not need to complete step 6.

All the contacts you create will now appear in your **'Contact Directory'**. Adding the practitioner type means that the contact will appear in fee earner/supervisor lists on CCMS.

You can edit a contact at any time, including assigning or removing the practitioner type. Click on the pencil icon next to the contact that you would like to edit.



Make any changes you wish, and then click **'Apply'** to save them.

Profile Management

[Firm Details](#) | [Office Details](#) | **Contact Directory** | [User Accounts](#)

Name	Email	Phone
Jack Black	jack.black@legal.co.uk	0203-322 1221

IMPORTANT: Creating someone as a contact is not the same as creating them as a user on CCMS. Use the **'Register a user and grant access to CCMS'** quick guide for advice on creating users.