



## Welcome to our CCMS E-Trainer publication

Thank you for taking the time to read this publication. This training update looks at some of the current CCMS training areas affecting users of CCMS.

### In this edition:

- [Our Online Modules](#)
- [Getting it right first time tips](#)
- [SPOTLIGHT: User Set up](#)
- [Frequently asked questions](#)
- [SPOTLIGHT: Claim upload](#)

## Document Upload enhancement

We have recently added new functionality to the upgraded version of CCMS. You are now able to upload documents to your application when it is submitted, you don't need to wait for a notification. For more information read the [submitting electronic evidence](#) quick guide. For the time being this is limited to substantive applications, including single stage delegated function applications.

| April 2016 |     |     |     |     |    |     |
|------------|-----|-----|-----|-----|----|-----|
| Sun        | Mon | Tue | Wed | Thu | Fr | Sat |
|            |     |     |     |     | 1  | 2   |
| 3          | 4   | 5   | 6   | 7   | 8  | 9   |
| 10         | 11  | 12  | 13  | 14  | 15 | 16  |
| 17         | 18  | 19  | 20  | 21  | 22 | 23  |
| 24         | 25  | 26  | 27  | 28  | 29 | 30  |

CCMS is now mandatory.

On the 1<sup>st</sup> of April we made CCMS mandatory for the remaining application types.

Use our [EventBrite](#) page to sign up for our online modules.



[Visit the CCMS Training Website](#)

## Did you know?

You can [clear your browser cache](#) if you are experiencing difficulties with accessing CCMS.

If your Internet Explorer browser is older than version 8 CCMS may not be compatible with the upgraded version of the merits assessment and the document upload functionality. Updating your browser will help you access the upgraded version of CCMS. The original version of CCMS will remain available to those using older browsers.

# Training Modules

We offer a range of training modules to help you use CCMS. You can attend a live online module with a CCMS trainer. See our module list below. Or download an interactive module from the CCMS Training Website for self study.

|                                                         |
|---------------------------------------------------------|
| Introduction to CCMS                                    |
| Actions / Notifications and Sending Electronic Evidence |
| Emergency Applications                                  |
| Special Children Act                                    |
| Housing                                                 |
| Means and Merits                                        |
| VHCC (Family)                                           |
| HCC (Non-Family)                                        |
| Assigning Counsel                                       |
| Amending Cases and Clients                              |
| Submitting Outcomes and Discharging a Certificate       |
| Provider Billing                                        |

To book a place on any of the above online modules visit the [LAA Event Brite](#) page.



## Getting it right first time: Vulnerable client - client correspondence

There are occasions when sending correspondence to the clients registered address is not in the clients interests. In CCMS client correspondence can be sent to a third party (care of) address if necessary.

When creating an application you will reach a page titled '**Correspondence Address**'. On this page there is a drop down box with three options: 'Client Address', 'Provider Office' or '**Case Specific Address**'. Below the drop down box there is a section where an address can be entered.

Choosing 'Provider Office' will direct the correspondence to the firm. Choosing 'Client Address' will send the correspondence to the clients registered address.

If you choose '**Case Specific Address**' and enter an address in the field provided, the correspondence will be sent to the address manually entered.

**Please Note:** If you choose 'Client Address' or 'Provider Office' do not provide any additional address details. CCMS will automatically send correspondence to the address held within CCMS.

A copy of any correspondence sent to the clients registered address or a case specific address will also be sent to the providers office as standard practice.

## SPOTLIGHT: User Setup

In CCMS each firm has an initial **firm administrator**, registered by the Legal Aid Agency (LAA).

Firm administrators are able to set up other users, including additional firm administrators. When setting up new users, the firm administrator is responsible for applying different roles for different users although individuals can be given multiple roles.

The roles determine the level of access a user has in CCMS. There are several roles in CCMS including: supervisor, case manager, office manager, bill preparation, and cross office access. The [roles matrix](#) provides in-depth information on the roles within CCMS.



[User Setup Guides](#)

### Upgraded CCMS

The upgraded version of CCMS makes your applications quicker and easier to submit to the LAA. We have given an existing firm administrator within every firm access to the upgraded version of CCMS.

To get access to the [upgraded version of CCMS](#) your firm administrator needs to log into CWA from the Online Portal. They will then be able to amend your account and give you the additional role. Only firm administrators can amend CCMS user profiles

*“Users who require access to the upgraded version of CCMS should contact their Firm Administrator who will be able to apply the correct role”*

## Getting it right first time: Uploading documents

Uploading documents in CCMS is a change to sending them by post. Here is some advice we’ve had from users of CCMS to make things easier and more efficient.



When scanning documents make sure they are the right way up and in order. If you’re scanning a larger bundle it might be worth scanning the documents individually. For example, scan pleadings to one document and bank statements to a separate document. You can upload more than one document with your submission.

To reduce the file sizes and make the most of the 8MB limit in CCMS, scan in black and white; also, reduce the scan resolution on the scanner. If you are converting word processor documents to PDF files before uploading them, save them as a compressed PDF. This will reduce the file size and increase the number of documents you can upload.

Finally, when adding your evidence to CCMS, give your documents accurate labels. Alternatively if you’re uploading all of your documents in one file, insert a contents page identifying enclosures.

# Your Questions

*“If I start a New Application, do I need to complete it all in one go?”*

No. After registering a client and completing basic case information the application will be saved in CCMS.

As soon as a case reference number is displayed on screen the application is saved.

You can return and complete the application at a later date.



[Click to view FAQs](#)

*“I had a documents required action, but it has now disappeared, why is this?”*

A documents required action has a time limit. The action will have a pending status for seven days then overdue for a further seven days. After fourteen days the action will be returned to the LAA.

If you need to provide evidence or information and the time limit has expired send a [case enquiry](#) requesting that it is reinstated.

*“Can other users in my firm access my actions and notifications?”*

When setting up an application a contact is selected. Actions and notifications are sent to the account of this user.

Users that have the office manager role are able to access the actions and notifications of other users by carrying out a refined search.

The case contact can be changed at any time during the case by [amending provider details](#).



## SPOTLIGHT: Claim Upload

The claim upload function allows CCMS users to submit multiple claims directly from their case management system to CCMS.

This function could save you time and improve your cash-flow by:

- Reducing the need to enter duplicate claim information and
- Allowing users to submit multiple claims on one file, including for different offices and advocates.

### Getting Started

Get in touch with your software vendor to ask them to upgrade your system to use claim upload. When you have been upgraded, download the guidance.

### Who can use claim upload?

Claim upload is part of the billing roles within CCMS. As long as your case management system has been upgraded to produce claim upload files, you will be able to use this feature.

### Two Parts:

Claim upload is split into two parts:

- Pricing Only
- Claim Upload

The pricing only option validates the claim information, making sure the claim contains the correct basic information. This is automated and ensures that the claim isn't waiting in a queue for manual assessment.

When the claim is uploaded, it is sent for assessment and authorisation by a billing caseworker.



[Claim Upload](#)

*“The claim upload function allows CCMS users to submit multiple claims directly from their case management systems to CCMS.”*



## Getting it right first time: Exceptional Case Funding applications

You should only select [exceptional case funding](#) from the category of law screen when you are creating an application that is not in scope for funding.

If you select exceptional case funding and your application is in scope, your application will be sent to the wrong casework department. This could result in your application being delayed.

**You should also use the exceptional case funding route if you are applying for a single case contract.**