Counsel system users: roles and responsibilities guidance

CCMS User Roles for Counsel

The administrator in your organisation will be given the ability to set up the following user roles in CCMS

- CCMS Chambers Administrator
- CCMS Counsel Bill Preparation
- CCMS Counsel Bill Submission

The roles allow you the flexibility to restrict the access you grant to a user on the system.
The same role can be assigned to multiple users depending on the needs of your organisation. and an individual user may be granted both roles if appropriate.

Chambers administrator

The chambers administrator allows access to CWA to create and assign roles to users within chambers.

This role also gives the user access to the online BACS statement and PSoA of the chambers or counsel the user is associated with. Once a user has this role they will receive a notification every time a BACS statement or PSoA is available.

Counsel Bill Preparation

This role allows the user to create and amend, but not submit, bills and payments on account.

Counsel Bill Submission

This role allows the user to review and submit bills and payments on account created by a user with the Counsel Bill Preparation role.

Actions and Notifications

Both the Counsel Bill Preparation and Counsel Bill Submission roles allow the user to view and respond to notifications and actions for those cases they have been assigned to.

You will need to decide who will require which role depending on their day to day responsibilities within your organisation. Once an individual has been assigned a role or roles they will then be able to complete the associated training modules which will be available on the website.

Case study
Jenny prepares the bills for legal aid work and her user role on CCMS is 'Chambers Bill Preparation'. This role allows her to review the case, prepare the bill and attach any evidence but does not allow her to make submissions.

The senior clerk Peter has the role of 'Counsel Bill Submission' and can review and submit the bills prepared by Jenny.

Counsel system users: CCMS roles and responsibilities matrix

Role Action	Chambers Administrator	Counsel Bill Preparation	Counsel Bill Submission
Create and assign roles to Users	●		
Search for and view cases		●	●
View case details		●	
View case statements of account		●	●
View case attachments		●	●
View actions and notifications		●	●
Create bills/POAs		●	
Submit bills/POAs			●
Attach documents/evidence		●	●
Submit attached documents		●	●
Submit notifications		●	●
View BACs and POSA statements	●		