

Provider system users: roles and responsibilities guidance

CCMS Provider User Roles

The User Role Matrix provides details of the roles available in CCMS, and the actions which may be completed by a user with each role.

The roles allow you the flexibility to restrict the access you grant a user on the system. A nominated user within your organisation (your existing LAA Online Firm System Administrator) will be given the **Firm Administrator Role** in CWA. The chosen roles will allow users access to a specific part of the system only, or grant them access to the whole system; depending on their responsibilities and the way your organisation is run.

The same role can be assigned to as many users as your organisation requires.

An individual user may also be granted as many of the roles as the system administrator feels is appropriate.

Supervisor Roles

The supervisor roles are the only roles which allow you to make submissions to CCMS. A user with access as a supervisor may review and submit applications/bills created by another user, for cases they are assigned to.

It is important to note that only an **'authorised litigator'** can be assigned the Case Management Supervisor role, as they are responsible for submitting applications for funding.

Case Management Role

A user with the Case Management Role has access to all areas of the system. This role is appropriate for fee earners who create applications or bills, which are checked by a supervisor before they are submitted.

Bill Preparation Role

This role allows users to create, but not submit bills and requests for payments on account. This role may be allocated to a costs draftsman, or to a fee earner or a fee earner/administrator. These roles are not able to submit claims or bills. This provides you with additional control over the items submitted.

Office Manager

This role provides an overview of all cases, notifications and actions within an organisation, but does not allow the user to create or submit applications or bills.

Cross Office Access

The default for a CCMS user is to be able to search for and view only the cases that they are a named contact for. Cross Office Access, when applied to a user with an existing CCMS role, extends their access so they can view all cases for the firm. (Note: Cross Office Access is built

into the Office Manager Role automatically).

Actions and Notifications

All users may access and respond to notifications for cases they are assigned to. Only the case contact (assigned on the 'Provider Details' screen of the case) will receive notifications about a case directly on their CCMS homescreen, however users within the Office Manager role can see the actions and notifications for all CCMS users at their firm.

Remittance Advice

Remittance advice is sent to user with the Firm Administrator role. However in order to access this information the users also need to have the Office Manager role.

Provider system users: CCMS roles and responsibilities matrix

*The Cross Office Access role can be applied to users with these roles to allow the user to access all cases for the firm, as opposed to just those for which they are a named contact.

| Role | Case Management* | Case Management Supervisor* | Bill Preparation* | Bill Supervisor* | Office Manager |
|--|------------------|-----------------------------|-------------------|------------------|----------------|
| Action | | | | | |
| Search for and view cases | ● | ● | ● | ● | ● |
| View case details | ● | | ● | | |
| View case attachments | ● | ● | ● | ● | ● |
| Search for client | ● | | | | |
| Register client/Amend client details | ● | | | | |
| Create new applications | ● | | | | |
| View proceedings | ● | | ● | | |
| Add/amend proceedings | ● | | | | |
| View, record and amend outcomes (inc. undertaking) | ● | | | | |
| View actions and notifications | ● | ● | ● | ● | ● |
| Add/amend case costs | ● | | | | |
| Request prior authority | ● | | | | |
| Submit new applications | | ● | | | |
| Submit amendments to applications /outcomes | | ● | | | |
| Create bills/POAs | | | ● | | |

| | | | | | |
|---|---|---|---|---|---|
| Submit bills/POAs | | | | ● | |
| Attach documents/evidence | ● | | ● | | |
| Submit attached documents | ● | ● | ● | ● | ● |
| Submit notifications | ● | ● | ● | ● | ● |
| Bulk upload – claim upload pricing only | | | ● | | |
| Bulk upload – claim upload | | | | ● | |
| Accessing remittance advice notifications | | | | | ● |

Provider system users: case studies

The following case studies provide further information regarding the roles available, and how they may be assigned.

Case study 1

Sinead is a fee earner and requires the ability to make applications for legal aid. She is new to the organisation and her work is reviewed by her supervisor. Sinead has been set up in CCMS with the role of 'case management', and is able to make applications for funding but is unable to make submissions to the LAA.

Sinead's supervisor, Kelly, has the role of 'case management supervisor' and reviews and submits Sinead's cases.

Case study 2

Helen is a senior fee earner at the organisation and has been set up with the roles of 'case management' and 'case management supervisor', this enables her to manage cases and make submissions to CCMS.

Helen is on annual leave and in her absence, Simon, who has the role of 'office manager' is able to monitor her notifications during this time.

Case study 3

Debbie is the external costs draftsman for the organisation and has been given the role of 'bill preparation', this enables her to prepare but not submit bills to CCMS.

Tom is a fee earner for the organisation and in addition to his 'case management role'; he also has the 'bill supervisor role'. Tom is therefore able to review and make submissions of the bills prepared by Debbie, the external costs draftsman.

Case Study 4

Louise is a secretary at the firm and is required to create and update client information for legal aid records. Louise has been allocated the role of 'case management' to enable her to undertake this work.

Case Study 5

James works for the in house costing department at his firm and is responsible for creating and submitting claims for payment. James has been allocated the role of 'bill preparation', this allows him to create the billing information and he also has the role of 'bill supervisor' which gives him the ability to submit the bills to the LAA.