

Case Access Administrator

Every firm should have one or more nominated Case Access Administrators. This is an essential role as only the Case Access Administrators for your firm will be able to assign unassigned cases to the solicitor users that have been served on your firm.

For example, if your firm is representing a respondent in a case, your firm may be given access to the digital file of the case by the applicant's solicitor. On service the digital file will appear in the "unassigned cases" tab of the manage organisation application. The Case Access Administrator would then need to assign this case to a solicitor in your organisation before that solicitor could work on the case.

1. The Superuser for your organisation will need to assign the nominated person the role of "Case Access Administrator" through the Manage Organisation application (<https://manage-org.platform.hmcts.net/>). This can be done for any user through the Users tab in manage organisation (first screenshot). You can also assign this role to new users when they are invited, (second screenshot).

The screenshot shows the MyHMCTS Manage organisation application interface. At the top, there is a navigation bar with 'MyHMCTS' on the left, 'Manage organisation' in the center, and 'Sign out' on the right. Below the navigation bar, there are three tabs: 'Organisation', 'Users', and 'Unassigned cases'. A 'BETA' banner is visible, stating 'This is a new service – your feedback will help us to improve it.' Below the banner, there is a 'Back' link. The main heading is 'Edit user'. Underneath, there is a 'Permissions' section with the instruction 'Choose at least one action the user can do. You can change this later.' There are four permission options, each with a checkbox and a description: 'Manage cases' (checked), 'Manage users' (checked), 'Manage organisation' (checked), and 'Case access administrator' (unchecked). A 'Submit' button is located at the bottom of the form.

MyHMCTS Manage organisation [Sign out](#)

[Organisation](#) [Users](#) [Unassigned cases](#)

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[Back](#)

Edit user

Permissions
Choose at least one action the user can do. You can change this later.

- Manage cases**
View, create and progress cases.
- Manage users**
Invite users.
- Manage organisation**
View the organisation name and address.
- Case access administrator**
Manage case access for all users within your organisation. You can assign this role to any user in your organisation. However, your service might not currently support this role. You will receive further guidance once it becomes available.

[Submit](#)

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[← Back](#)

Invite user

When you send this invitation, the user will receive an email from HM Courts and Tribunals Registrations so they can finish setting up their account.

First name

Include all middle names.

Last name

Email address

Permissions

Choose what the user will be able to do. You can change this later.

- Manage Cases**
View, create and progress cases.
- Manage Users**
Invite users.
- Manage Organisation**
View organisation name and addresses.
- Case Access Administrator**
Admin Case Access

[Send invitation](#)

- When logging in to Manage Organisation, the Case Access Administrator will see a new tab called "Unassigned cases". Clicking on this will bring up a list of all cases that have been served on the organisation and which need to be assigned to an individual solicitor user(s) within your firm. Cases are grouped into separate tabs with lists for each case type.

MyHMCTS
Manage organisation [Sign out](#)

[Organisation](#)
[Users](#)
[Unassigned cases](#)

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Unassigned cases

▶ [Can't find a case?](#)

Caveat [Grant of Representation](#)

Share case

<input type="checkbox"/>	Solicitor reference	Case reference	Case created date	Pet. First name	Pet. Last name	Resp. First name	Resp. Last name	Due Date
<input type="checkbox"/>		4748-2828-7712-8233	16 Jun 2020	Paul	Saddlebrook	Jennifer	Saddlebrook	
<input type="checkbox"/>	Michele Serrano EB-345-2020	9417-3739-9576-5131	22 May 2020	Neha	Venkatanarasimharaj	Sanjet	Venkatanarasimharaj	17 Aug 2020

[GOV.UK Prototype Kit v8.9.0](#)
[Clear data](#)



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The Case Access Administrator can only view the basic details of the case, similar to what is contained within a service letter. It's not possible for the Case Access Administrator to open the case file or view the case details in the Manage Organisation application. The details provided in the unassigned case list should be sufficient to enable the Case Access Administrator to identify who should handle the case. The "Solicitor reference" field is completed by the Applicant solicitor and will often contain information helpful in determining to whom the case should be assigned.

3. To assign a case to a solicitor user, first select the case you wish to assign and then click “Share Case”. The Case Access Administrator can select cases from multiple case types on different tabs.

MyHMCTS **Manage organisation** [Sign out](#)

[Organisation](#) [Users](#) [Unassigned cases](#)

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Unassigned cases

You can share a case from your unassigned case list with yourself or a colleague. Your colleague must be registered with your organisation and have access to Manage cases.

Caveat [Grant of Representation](#) [Contested Financial Remedy](#)

<input type="checkbox"/>	Solicitor reference	Case reference	Case created date	Pet. First name	Pet. Last name	Resp. First name	Resp. Last name	Due Date
<input checked="" type="checkbox"/>		4748-2828-7712-8233	16 Jun 2020	Paul	Saddlebrook	Jennifer	Saddlebrook	
<input checked="" type="checkbox"/>	Michele Serrano EB-345-2020	9417-3739-9576-5131	22 May 2020	Neha	Venkatanarasimharaj	Sanjet	Venkatanarasimharaj	17 Aug 2020
<input type="checkbox"/>		2877-6519-5618-9839	9 Jun 2020	Iain	Curran	Robin	Curran	

[Share case](#)

4. The Share Case screen shows the cases you've selected and allows you to add users to the cases you've selected. You can search for solicitor users within your organisation by name or email address and add them to the selected cases. When you've added all the solicitor users you want to add click "Continue".

MyHMCTS **Manage organisation** [Sign out](#)

[Organisation](#) [Users](#) [Unassigned cases](#)

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[← Back](#)

Share a case

Add recipient

Enter email address
Search by name or email address.
You can only add people from your organisation individually – but you can add as many as you like.

[▶ Can't find an email address?](#)

Selected cases

[Close all](#)

Paul Saddlebrook Vs Jennifer Saddlebrook
4748-2828-7712-8233

All users with access to this case.

Name	Email address	Actions
Michele Serrano	michele.serrano@wedlakebell.com	Cancel TO BE ADDED
Terence Williams	terence.williams@wedlakebell.com	Cancel TO BE ADDED

Neha Venkatanarasimharaj Vs Sanjet Venkatanarasimharaj
9417-3739-9576-5131

All users with access to this case.

Name	Email address	Actions
Michele Serrano	michele.serrano@wedlakebell.com	Cancel TO BE ADDED
Terence Williams	terence.williams@wedlakebell.com	Cancel TO BE ADDED

[Continue](#)

5. On the “check and confirm page”, check your selections and click confirm. This will assign the cases to the solicitor user(s) you have selected and remove those cases from the unassigned cases queue. The assigned solicitor users will now have this case in their Case List when they log in to Manage Cases.

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[Organisation](#) [Users](#) [Unassigned cases](#)

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[← Back](#)

Share a case

Check and confirm your case

Cases

Paul Saddlebrook Vs Jennifer Saddlebrook [Change](#)
4748-2828-7712-8233

Name	Email address	
Michele Serrano	michele.serrano@wedlakebell.com	TO BE ADDED
Terence Williams	terence.williams@wedlakebell.com	TO BE ADDED

Neha Venkatanarasimharaj Vs Sanjet Venkatanarasimharaj [Change](#)
9417-3739-9576-5131

Name	Email address	
Michele Serrano	michele.serrano@wedlakebell.com	TO BE ADDED
Terence Williams	terence.williams@wedlakebell.com	TO BE ADDED

[Confirm](#)