

## MyHMCTS: online case management for legal professionals

1. [About My HMCTS](#)
2. [Accessing MyHMCTS](#)
3. [Organisation account administrators](#)
  - a. About account administrators
  - b. Who can be an account administrator
4. [Users](#)
  - a. How to add a user
  - b. Adding more account administrators
  - c. Viewing and updating a user's account
  - d. Re-inviting users
  - e. Suspending users
  - f. When a user leaves the organisation
5. [Case management](#)
  - a. Share a case
    - i. Transfer cases to another user
  - b. Respondent journey – case access administrator (CAA)
    - i. About case access administrators
    - ii. Who can be the CAA and how to appoint them
    - iii. How to assign cases
  - c. Notice of change
6. [Errors you may encounter](#)
7. [Payment by Account](#)
  - a. About Payment by Account (PBA)
  - b. How to get a Payment by Account
  - c. Add your PBA account number to your organisation

## 1. About MyHMCTS?

MyHMCTS is an online case management tool for legal professionals that allows online case and payment submission, and organisation management.

This guide is for all professional users of the MyHMCTS service.

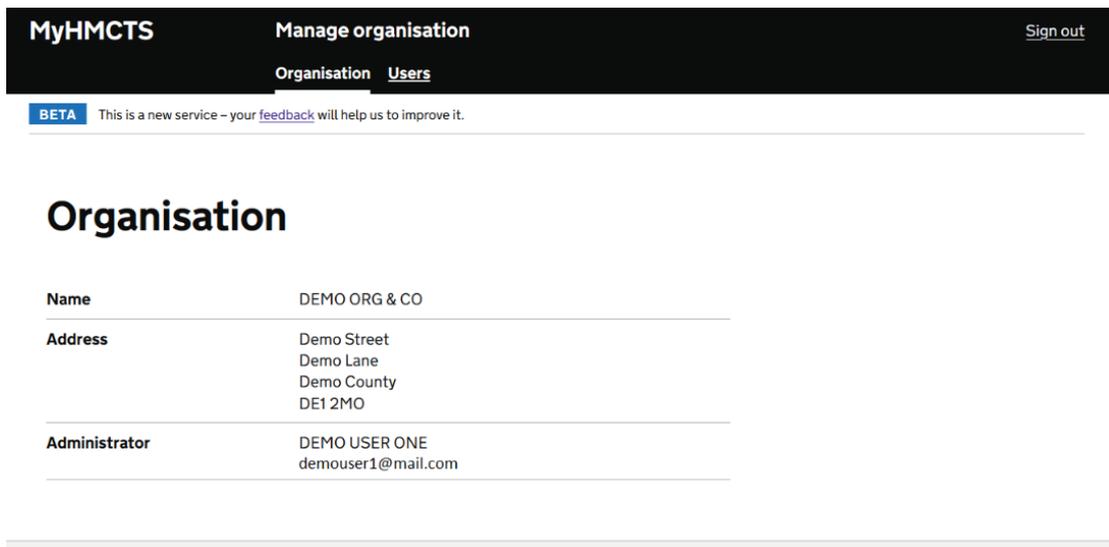
## 2. Accessing MyHMCTS

MyHMCTS is comprised of 2 services that provide access for the following functions:

- a. Manage organisation: MyHMCTS account administrators can view the organisations name and address, and invite more users through <https://manage-org.platform.hmcts.net>

### The organisation

Following login and entry of the verification code, you will be presented with a screen that shows the organisation details as registered with MyHMCTS.



<b>MyHMCTS</b>	<b>Manage organisation</b>	<a href="#">Sign out</a>
	<b>Organisation</b>	<b>Users</b>

**BETA** This is a new service - your [feedback](#) will help us to improve it.

## Organisation

<b>Name</b>	DEMO ORG & CO
<b>Address</b>	Demo Street Demo Lane Demo County DE1 2MO
<b>Administrator</b>	DEMO USER ONE demouser1@mail.com

Organisational detail requests should be sent to the MyHMCTS support team on [myhmctssupport@justice.gov.uk](mailto:myhmctssupport@justice.gov.uk). Please provide the name of your organisation and the change of details.

### The users

The full list of users that are part of your organisation can be found under the 'Users' tab in the black banner.

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## Users

Invite user

Name	Email	Status
<a href="#">DEMO_USER_ONE</a>	demouser1@mail.com	Active
<a href="#">Demo User Two</a>	demouser2@mail.com	Pending
<a href="#">Demo User Three</a>	demouser3@mail.com	Active
<a href="#">Demo User Four</a>	demouser4@mail.com	Active
<a href="#">Demo User Five</a>	demouser5@mail.com	Active
<a href="#">Demo User Six</a>	demouser6@mail.com	Active
<a href="#">Demo User Seven</a>	demouser7@mail.com	Active
<a href="#">Demo User Eight</a>	demouser8@mail.com	Active
<a href="#">Demo User Nine</a>	demouser9@mail.com	Active

Each user that is part of the organisation, or has been invited to join the organisation, will appear in this list. It will show their name, their email address and their account status. You can see the users who have activated and can use the service and those users who have been invited but not yet activated.

- b. Manage cases: Users can view, create and progress cases through: <https://manage-case.platform.hmcts.net>

### Case list

Following login and entry of the verification code, you will be presented with the case list screen.

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## Case List

Hide Filter

### Filters

Jurisdiction

Manage probate applications

Case type

Grant of representation

State

Any

Apply

Reset

### Case List

Displaying 1 - 15 out of 15 results

Case reference	Your reference	First name(s) of deceased	Last name(s) of deceased	Date of death	Case printed
<a href="#">1597-3359-0850-8002</a>	Ref test	Test	deceased	1 Jan 2020	
<a href="#">1597-6529-2408-4291</a>	Ref test	TEST	TEST	1 Jan 2000	
<a href="#">1597-6640-7797-6223</a>	Ref test	test	test	1 Jan 2020	
<a href="#">1598-3638-2498-5103</a>	Ref Admon	test	test	1 Jan 2020	
<a href="#">1598-3640-9401-0432</a>	test	test	test	1 Jan 2020	
<a href="#">1602-4952-3146-1049</a>	REF	Test	Test	1 Jan 2000	
<a href="#">1603-7321-5242-4773</a>	Ref test	Dummy	TESTING	1 Jan 2020	

You can create a new case and search for existing cases that have been created/submitted through MyHMCTS.

For guidance on how to register for the service or how to submit an application through MyHMCTS, please visit [MyHMCTS: online case management for legal professionals](#)

c. Multi-factor Authentication (MFA)

This is a security feature that requires a user to enter a verification code each time they login to the service. The verification code will be sent to the user by email and must be entered within 90 minutes, after which it expires.

Things to know:

- If the verification is entered after 90 minutes, the system will inform the user of this and it will send a new one.
- If the verification code is not entered before a new login attempt to the service is made for an account, the new login attempt will invalidate the previous verification code and send the user a new verification code.

The verification code email should be received shortly after logging in, however, if the code it is taking up to or more than 10 minutes to arrive, the following security configuration setting changes may need to be made to speed up the delivery of the verification codes.

Security configuration settings

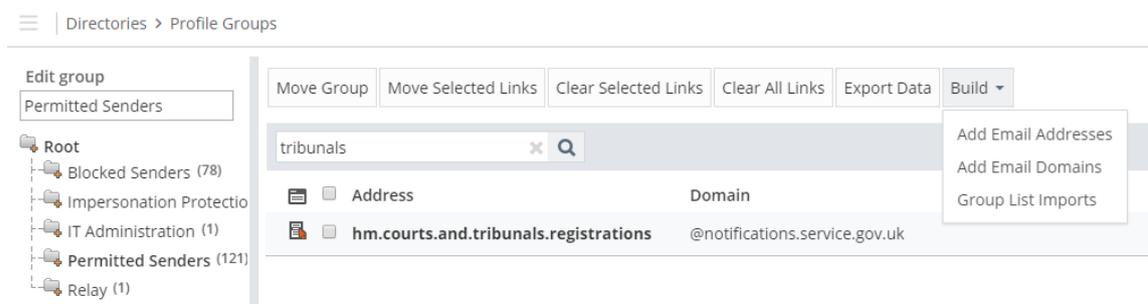
Steps to take in Outlook – Add (whitelist) the email address:

[hm.courts.and.tribunals.registrations@notifications.service.gov.uk](mailto:hm.courts.and.tribunals.registrations@notifications.service.gov.uk) in the firms safe sender list in outlook settings.

Additionally, add @notifications.service.gov.uk email domain to any trusted domain list that is held by the firm.

Steps to take in External Security software (e.g. Mimecast)

Set as permitted sender - Navigate to Administration -> Directories -> Permitted Senders -> Build -> Add email addresses and add [hm.courts.and.tribunals.registrations@notifications.service.gov.uk](mailto:hm.courts.and.tribunals.registrations@notifications.service.gov.uk)



Add exception to Greylisting policy - Navigate to Administration -> Gateway -> Policies Greylisting and create a new policy with the following settings:

Go Back Save Save and Exit

Options

Policy Narrative  ?

Select Option  ?

---

Emails From

Addresses Based On  ?

Applies From  ?

Specifically  ?

---

Emails To

Applies To  ?

Specifically  ?

---

Validity

Enable / Disable  ?

Set policy as perpetual  ?

Date Range  ?

Policy Override  ?

Bi Directional  ?

If users are still experiencing delays/ issue with the verification codes, they should contact [myhmctssupport@justice.gov.uk](mailto:myhmctssupport@justice.gov.uk) for assistance.

### 3. Organisation account administrators

#### a. About account administrators

This is any user with the full set of available access permissions to MyHMCTS. The person who originally registered the organisation for MyHMCTS automatically becomes the account administrator and can:

- view, create and progress cases
- invite and manage users
- manage the organisation, including name and address
- manage case access for all users in the organisation

The original account administrator is responsible, once their account is approved and activated, for inviting the required users to join the organisation.

b. Who can be an account administrator

Anyone can be an account administrator and we advise that there should be at least two in your organisation. This is to ensure continuity if that person is unavailable through annual leave or has left the organisation.

Existing users within the organisation can also be appointed as account administrator. Please see 'Viewing and updating a user's account' section for further information.

## 4. Users

a. How to add a user

As the original account administrator, it is your responsibility to invite more users to the organisation. You can add as many users as you require, and this can be done within the 'Users' tab by selecting the green 'Invite user' button.

You will see a screen to enter the name, email address and select what access permissions you would like to give the user.

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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 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.

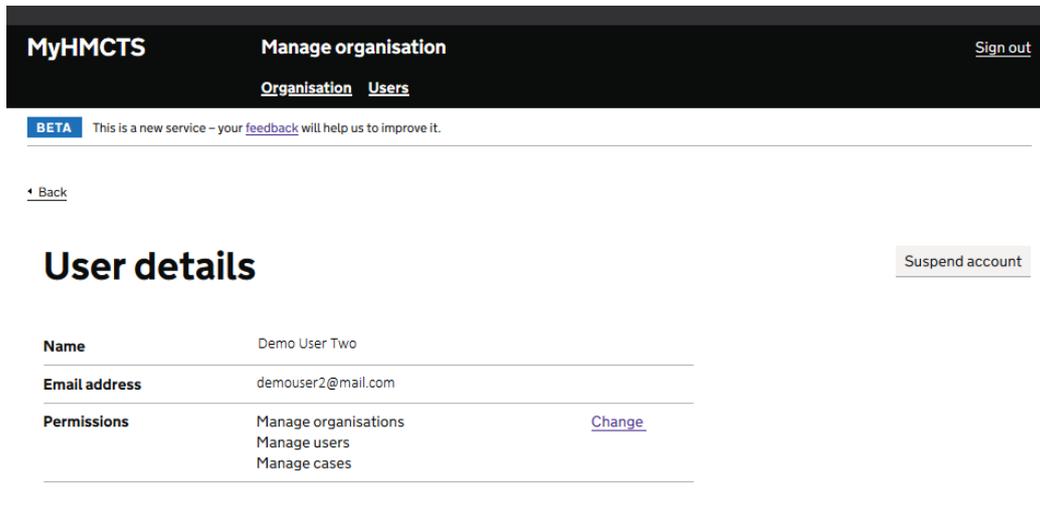
[Send invitation](#)

b. Adding more account administrators

You can appoint an account administrator at the invitation stage. You should select all the available access permissions.

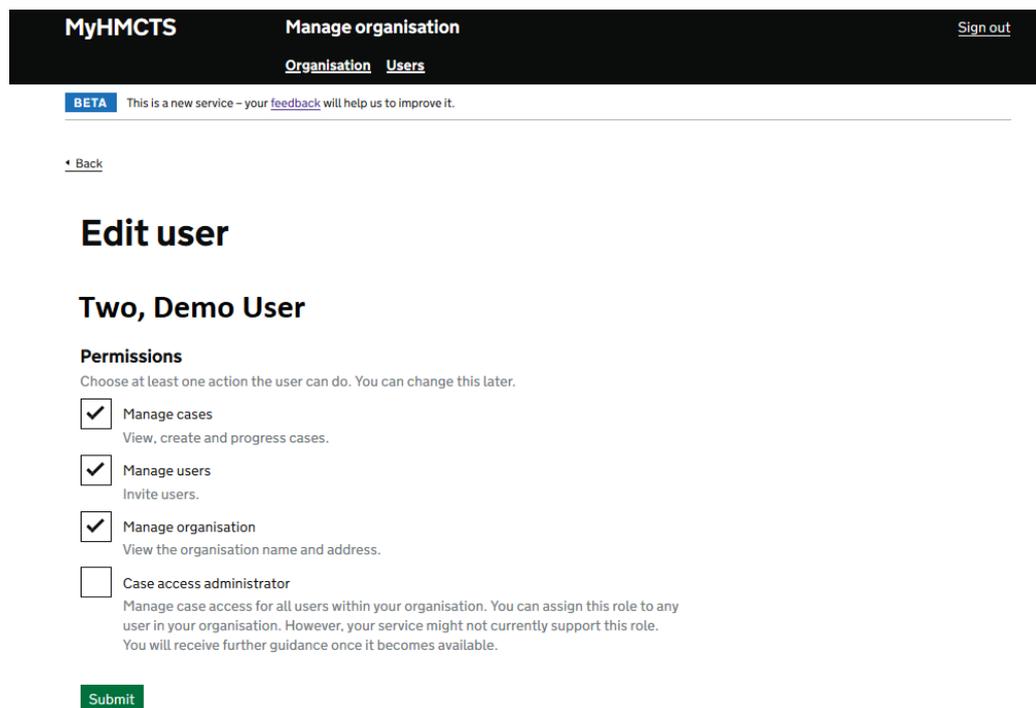
c. Viewing and updating a user's account

You can view a user's account from within the 'Users' tab and by selecting the user's name. A screen showing that users details will appear.



This will tell you the user's name, email address and the access permissions, which will help you identify if you need to update the account.

To update the access permissions select 'Change' next to the available permissions for the user. This will bring up tick boxes to select or unselect permissions.



After you have selected or unselected the permissions, select submit and you will be returned to the account details with the updated information.

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

[Organisation](#) [Users](#)

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[← Back](#)

## User details

[Suspend account](#)

<b>Name</b>	Demo User Two
<b>Email address</b>	demouser2@mail.com
<b>Permissions</b>	Manage users <a href="#">Change</a> Manage cases

#### d. Re-inviting users

The activation email when a user is first invited lasts for 20 days. You can re-invite a user when they have not activated their account in time.

The users account status will display as pending until they have activated their account. You can view a user's account from within the 'Users' tab and by selecting the user's name. A screen showing the user has not activated their account will appear.

[← Back](#)

## Pending user details

<b>Name</b>	Test User
<b>Email address</b>	Testuser@gmail.com

This user has already been invited but has not activated their account.

If you resend an invitation, they'll receive an email from HM Courts and Tribunals to finish setting up their account.

You can't invite the same user more than once an hour.

[Resend invitation](#)

To resend the activation email, select 'resend invitation'. You will see a screen for that user to select what access permissions you would like to give the user.

## 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.

e. Suspending users

You can suspend a user account when they have left the organisation. The suspension removes access to the account immediately and the user will not be able to login to the service.

You should not suspend an account if you need to re-invite the user again due an error in their email address or name. If the error is in the email address you can re-invite the user with the correct email address.

If an account has been suspended in error, you must contact [myhmctssupport@justice.gov.uk](mailto:myhmctssupport@justice.gov.uk) to ask for the account to be unsuspended and provide the reason.

f. When a user leaves the organisation

As part of a user's leaving process, they should ensure that all their cases are shared, where possible, with another user. They can do this for the services that have the 'share a case' functionality available to them.

For the services where the share a case functionality is not available, these cases must be removed from MyHMCTS. Users should tell the service for the case that they are leaving or that the user has left and ask for the email be updated to another user. This will ensure all future notifications for the case are received. However, to make progress, the case will revert to the current paper process for that service.

## 5. Case management

The management and progression of cases will differ between services and you should refer to the service guidance for assistance.

a. Share a case

This allows you to share a case you have submitted to the court or tribunal with another user in your organisation. This gives the new user full access to the case to view and progress where necessary.

You should ensure that you share all cases you have submitted, where possible, with at least one other user to avoid the organisation losing access to the case if you leave the organisation.

i. Transfer cases to another user

Cases cannot be transferred from one user to another. Users should use the share a case functionality. For services where the share a case functionality cannot be used, it will revert to paper.

b. Respondent journey – case access administrator (CAA)

ii. About case access administrators (CAA)

This is a user with the ability to assign unassigned cases served on your organisation to the relevant users. This is an essential role as only the CAAs for your organisation can assign unassigned cases.

This role is linked to the respondent journey functionality - for example, where your organisation is representing a respondent in a case, the solicitor can be given access to the digital case file submitted by the applicant's solicitor. This digital case file will appear under the 'unassigned cases' tab accessible to the CAA. They will need to assign this case to the solicitor in your organisation before the solicitor can work on the case.

iii. Who can be the CAA and how to appoint them

Anyone can be the CAA, and every organisation should have one or more nominated CAA.

Appointing a CAA can be done at the user invitation stage or by updating a user's account. The CAA can assign the 'unassigned' cases to the individuals in your organisation

iv. How to assign cases

Only a CAA can do this. When logged into the 'Manage Organisation' service, there will be a tab titled 'Unassigned Cases'. Select this to bring up a list of all cases served on the organisation. Cases are grouped by case type in separate tabs.

You will only be able to view basic case details (similar to a service letter). This should be enough for you to assign it to the right user.

Select the case and then 'Share Case'. The share a case screen will show the selected case(s) and ask for the user's email address. Once you have entered the user's email

address, select 'continue'. Check the information on the confirmation page and then select 'confirm'.

These cases will be assigned and will no longer appear under the 'unassigned case' list.

c. Notice of change

This is the ability to record a change in the representation of parties on a case. It covers the following situations:

1. Notice of change – litigant in person to legal representative: A litigant representing themselves decides to engage legal representation. The new legal representative must initiate the notice of change in MyHMCTS.
2. Notice of change – legal representative gaining access to case: A legal representative who is already on record on a case in some capacity but does not have access via MyHMCTS, needs to gain access to the case. They enter the case reference and follow the same path as scenario 1 (above).
3. Notice of change – legal representative to legal representative: A represented litigant changes their legal representation. The new representative must initiate the notice of change in MyHMCTS.
4. Notice of change – legal representative coming off record: legal representative requests to come off record. The request is initiated via the case and results in loss of access to the case.

**Initiating a notice of change**

You can complete this by selecting 'Notice of Change' from the black banner at the top of the screen in MyHMCTS.

Enter the case reference number and your client's details as they appear on the case, including any spelling errors. Then review and submit the notice of change. You will need to confirm you have served notice of this change on all parties before proceeding.

You will see a screen confirming the notice of change was successful and the case will appear in your case list as usual.

## 6. Errors you may encounter

There are different errors you may encounter when using the service that you should be aware of:

### Financial Remedy (FR)

As part of the FR consent and contested application journeys, you must search and select your organisation as part of the 'Applicant Organisation Policy' section:

The screenshot shows the MyHMCTS interface for a 'Consent Order Application'. At the top, there is a dark navigation bar with 'MyHMCTS' on the left, 'Manage cases' in the center, and 'Sign out' on the right. Below this, there are links for 'Case list', 'Create case', and 'Find case' with a search icon. A blue 'BETA' banner states: 'This is a new service - your feedback will help us to improve it.'

The main content area is titled 'Consent Order Application' and includes a 'SOLICITOR DETAILS' section with a 'Solicitor's name' input field. Below that is the 'Applicant Organisation Policy' section, which has a sub-heading 'Search for an organisation'. A note explains: 'You can only search for organisations already registered with MyHMCTS. For example, you can search by organisation name or address.' There is a search input field containing the text 'Demo'. Below the search field, the results for 'DEMO ORG & CO' are displayed, including the address: 'Demo Street, Demo Lane, Demo County, DE1 2MO'. A 'Select' button is positioned to the right of the address. At the bottom of the search results, there is a link: '▶ Can't find the organisation you are looking for?'.

If you cannot find your organisation, try searching with one keyword or by the postcode. You may need to scroll down through a list of results to find your organisation.

If you do not select your organisation at this stage, you will receive an error message before case submission. You can resolve this through the 'amend application details' step.

### Probate - Inheritance Tax (IHT) form submission date

For estates where there is inheritance tax to pay, you must enter the Inheritance Tax (IHT) form submission date. This confirms you have allowed 20 working days for HMRC to process the forms before you submit the probate application to the court.

If you try to submit the probate application to the court within 20 working days of your IHT form, the system will not allow this and provide your earliest available submissions date.

## All services

When completing an application, you should not leave an additional blank space at the end of the last word in any given field. If there is, the system will show an error stating that 'The data entered is not valid for this type of field'.

This error message will disappear as soon as you remove the additional blank space.

## **7. Payment by Account (PBA)**

### a. About Payment by Account (PBA)

This is a free service, enabling legal firms and organisations to pay for HMCTS related fees by direct debit. The service is managed by a third-party provider, Liberata UK. You are provided with a PBA account number which is used when paying for MyHMCTS online applications.

### b. How to get a Payment by Account

Complete an application form and submit this to Liberata UK. Once processed, they will confirm your assigned PBA number. Please visit [HMCTS Payment by Account for online services](#) for guidance on how to obtain a PBA.

### c. Add your PBA account number to your organisation

A firm's PBA account number can be added when the firm is registered for MyHMCTS. If this was not included at the registration stage, users should contact the MyHMCTS support team on [myhmctssupport@justice.gov.uk](mailto:myhmctssupport@justice.gov.uk), providing the details about their organisation and the PBA number they would like adding.

We will be adding the ability for a nominated user to add additional PBA numbers to their organisation. These users will be the 'Finance Manager'.