Assign court case(s) to OU Account(s) by SA of the same branch, including assignment by PA (by profile)

Whenever an Organization opts to transact with the e-Courts electronically for a specific court case (i.e. linking up of an Organization Account with that specific court case), the PA, or SA, is required to assign that specific court case to OU Account(s) before the account holder(s) can carry out further electronic transactions with the e-Courts by means of iCMS[1].
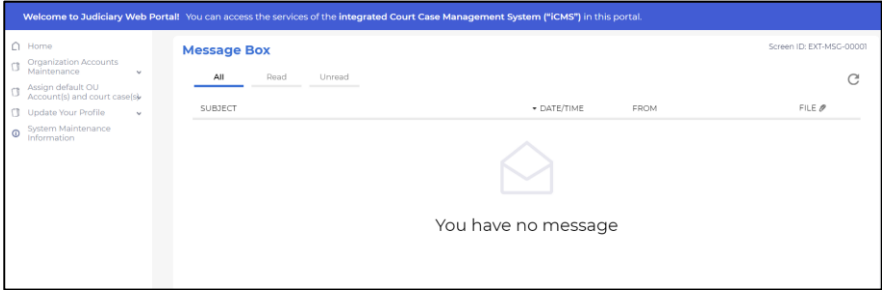
There are **two types of case link-up**, namely -

(1) Assign case(s) by **Profile** to OU(s) – If SA decides to assign court cases according to case profile (e.g. Personal Injuries Action of the District Court) to designated OU(s) <u>of the same branch</u>, no further link-up of such type of cases individually will be required.

(2) Assign case(s) by **Case No.** to OU(s) – If SA opts to assign individual cases to designated OUs <u>of the same branch</u> one by one, the OUs can only access to those particular cases that SA entitles them to access.

This step-by-step guide outlines the general process required
- to link-up court case to an OU Account **by SA of the same branch, including assignment by PA <u>by Profile</u>**[2]; and
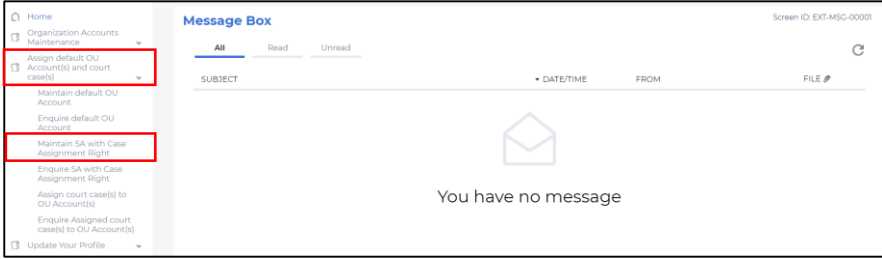- to remove case profile(s) assigned to SA by PA.

It is for general guidance only. The screenshots provided hereunder are for general illustration purpose and may not be specific for the case/document concerned.

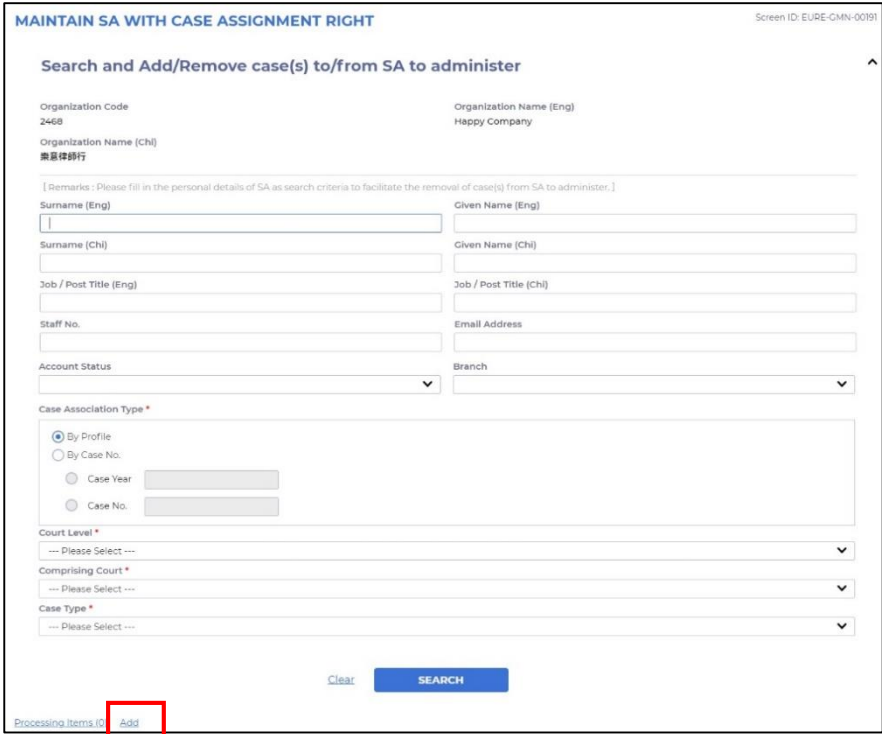| Item	Process	Related screenshots for reference
1.	**Login user account** *[Note: Please refer to the step-by-step guide **Account Login and Logout** for information if necessary.]*	The landing page after logged-in is displayed
NOTE	*The function of "Maintain SA with Case Assignment Right" is only available to PA(s) of the Organization to access.*	

---

[1] When assigning court case to OU Account, PA and SA should be cautious to avoid conflict of interest.

[2] For assignment of cases to OUs by case number, please refer to the step-by-step guide on **Assign court case(s) to OU Account(s) by SA of the same branch, including assignment by PA (by case number)** for more information.
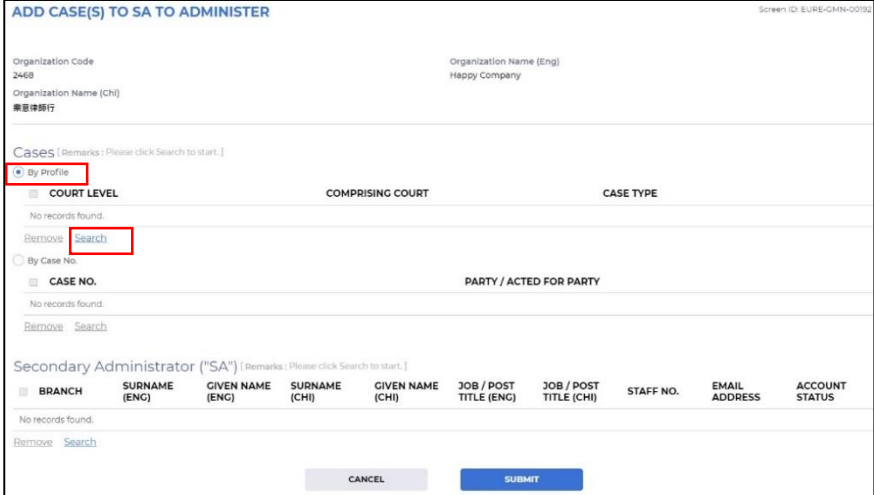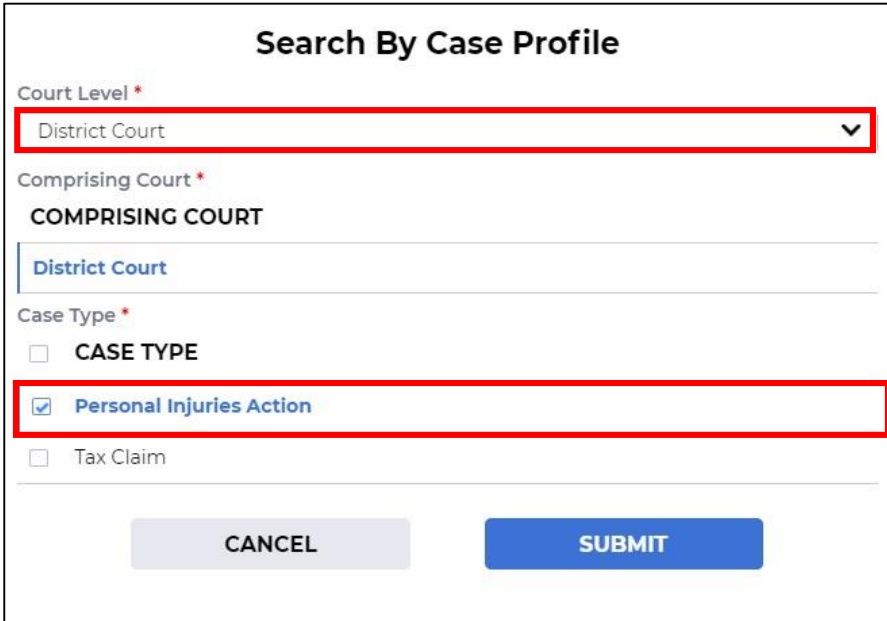
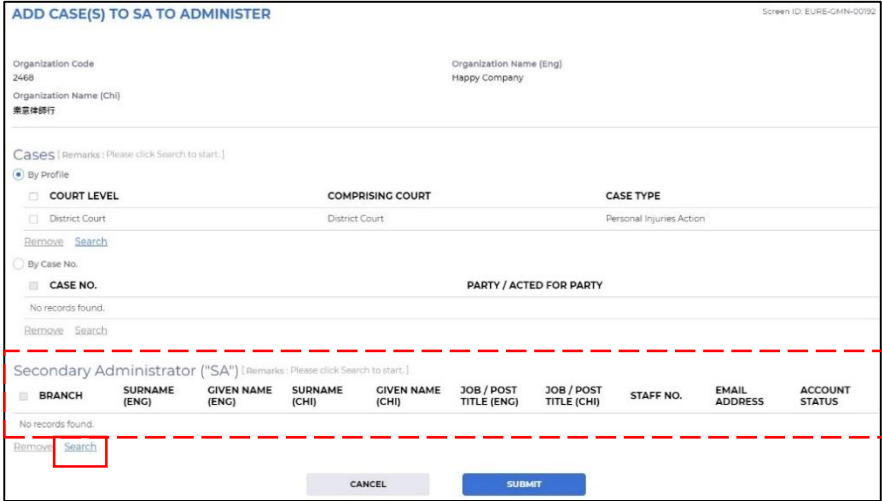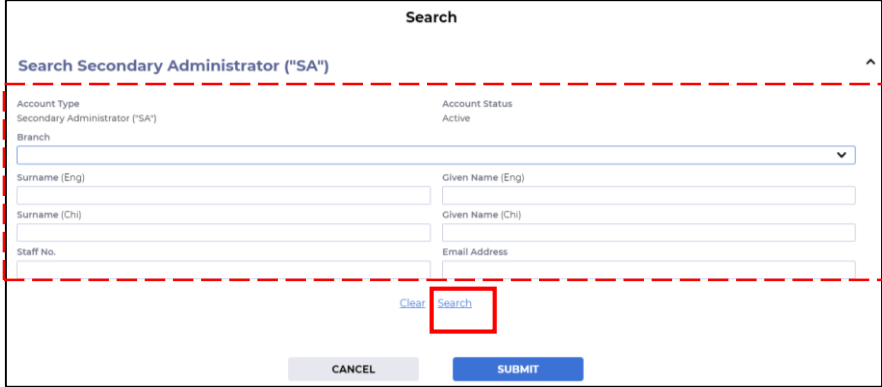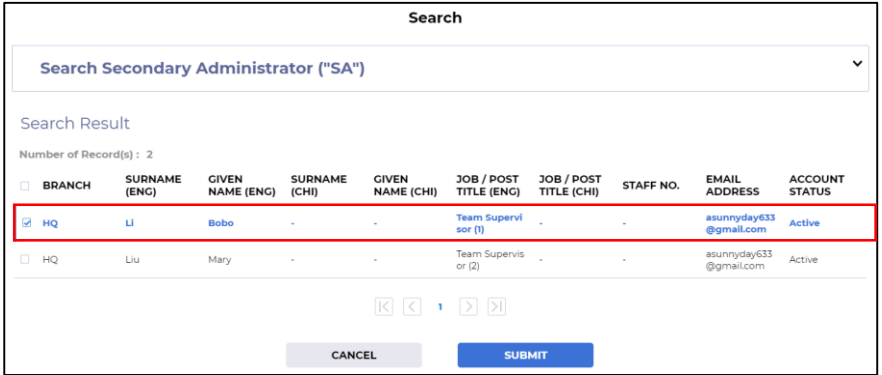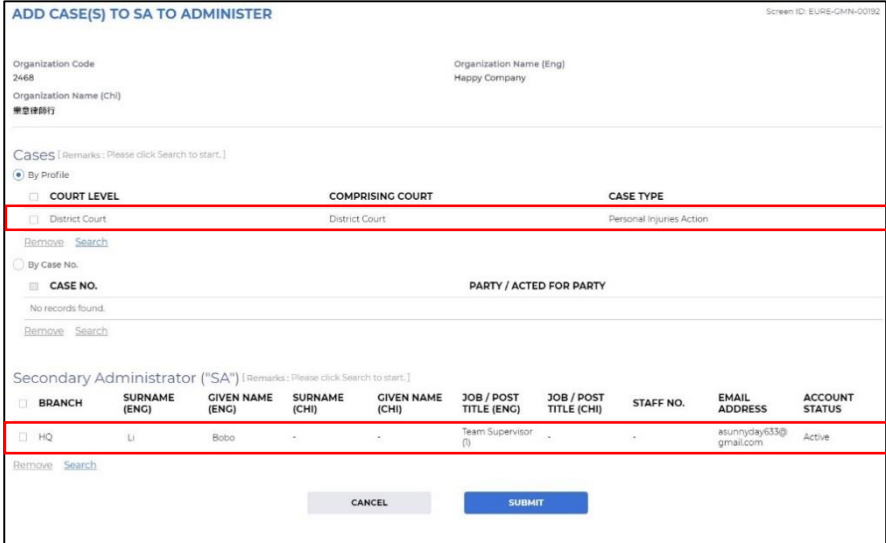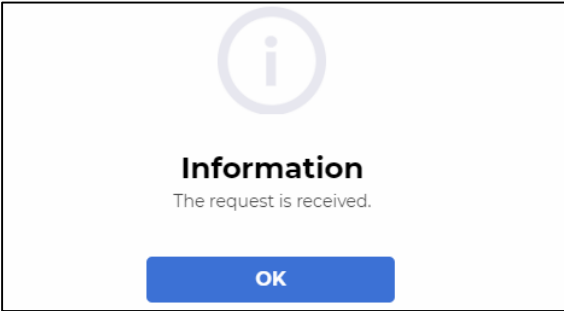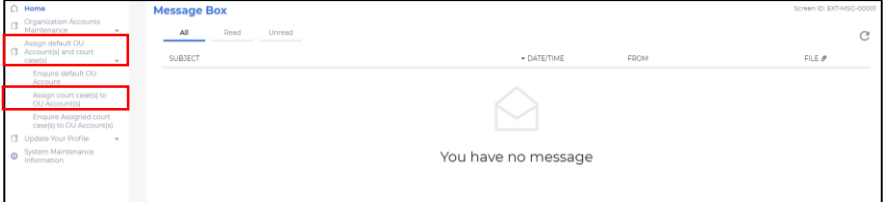| Item	Process	Related screenshots for reference
2.	**Assign default OU Account(s) and court case(s)** After logging in with a PA account, under Main Menu > Assign default OU Account(s) and court case(s) > Select Maintain SA with Case Assignment Right >	The landing page of PA Account after logged-in is displayed
Add case(s) to SA to administer (By Profile)		
3.	**Maintain SA with Case Assignment Right** Scroll to the bottom of the page, click "Add" for case association type selection > *[Note: Please refer to items 20 to 24 for procedure on removal of assigned case profile(s) from SA(s).]*	The "Maintain SA with Case Assignment Right" screen is displayed

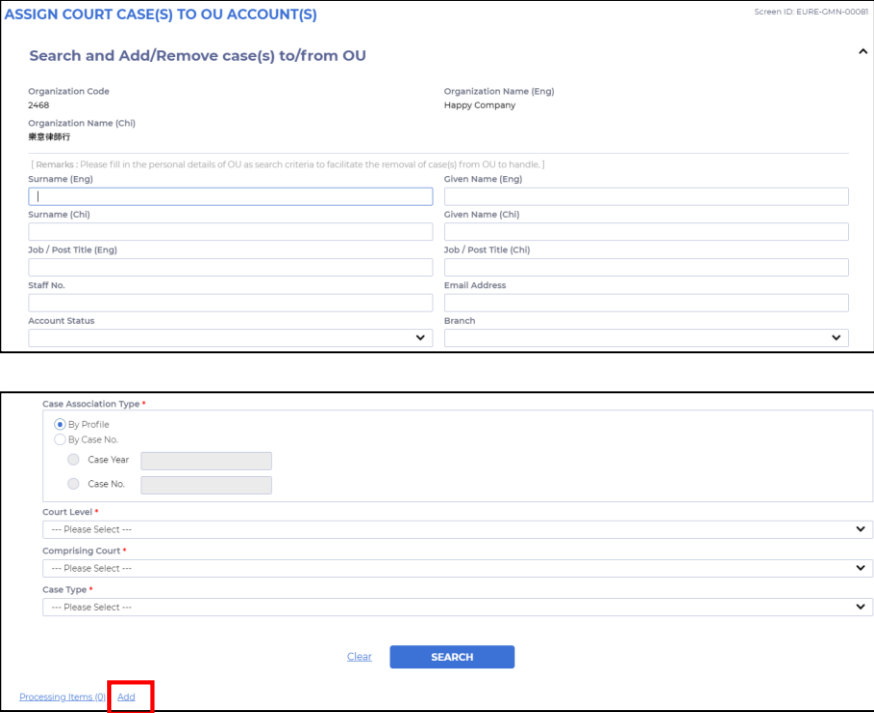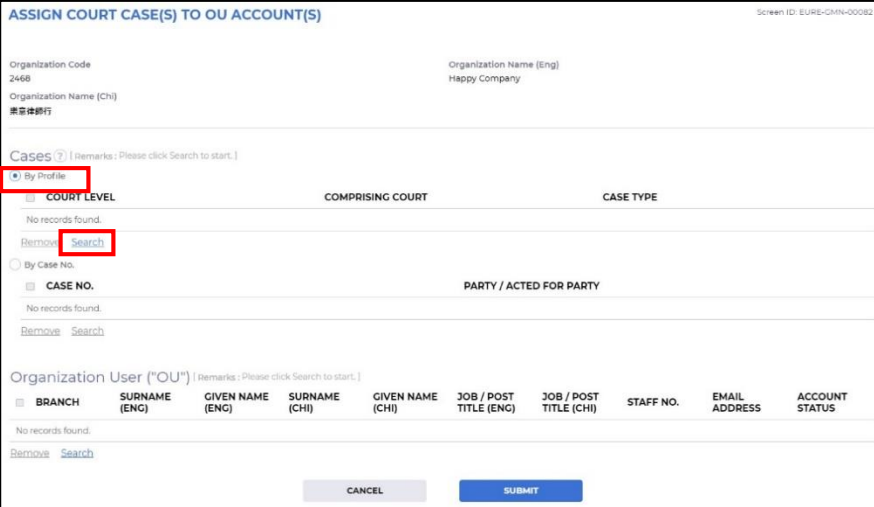| Item	Process	Related screenshots for reference
4.	**Add Case(s) to SA By Profile** Select the option "By Profile" (i.e. case type) > Click "Search" >	The "Add Case(s) to SA to administer" screen is displayed
5.	**Select Court Level and Case Type** Select Court Level > *[Note: The Comprising Court is pre-set by the system according to the Court Level selected.]* Select the checkbox next to the Case Type(s) you want to assign > Click "SUBMIT" >	The "Search By Case Profile" screen is displayed
NOTE	*PA may select the checkbox next to "CASE TYPE" to select all available case types under the corresponding Court Level for assignment to SAs.*	

Item	Process	Related screenshots for reference
6.	**Search for a SA** Under "Secondary Administrator ("SA")" section Click "Search" >	The "Add Case(s) to SA to administer – Secondary Administrator ("SA")" screen is displayed
7.	**Input the search criteria to search a SA** Input search criteria > Click "Search" >	The "Search Secondary Administrator ("SA")" screen is displayed
8.	**Select the SA to whom cases to be linked-up by profile** Depending on the search criteria entered, the result will then display Select the checkbox next to the SA(s) you want to assign the selected case profile to > *[Note: PA may select more than one SAs to link-up with the selected profile(s) >* Click "SUBMIT" >	The "Search result of Secondary Administrator ("SA")" screen is displayed

Item	Process	Related screenshots for reference
9.	**Confirm the options selected** Check the case profile selected in Item 5 and the SA(s) selected in Item 8. Then click "SUBMIT" >	All the selected options are displayed
10.	**Acknowledgement** Click "OK" to complete >	A pop-up message screen is displayed
NOTE	*SA can link up case to OUs of same branch by profile **AFTER** the related case profile is assigned by PA to this SA.*	
11.	**SA to assign court cases to OU by profile –** **Assign default OU Account(s) and court case(s)** After logging in with the designated SA Account, under Main Menu > Select Assign default OU Account(s) and court case(s) > Select Assign court case(s) to OU Account(s) >	The landing page of SA Account after signed-in is displayed
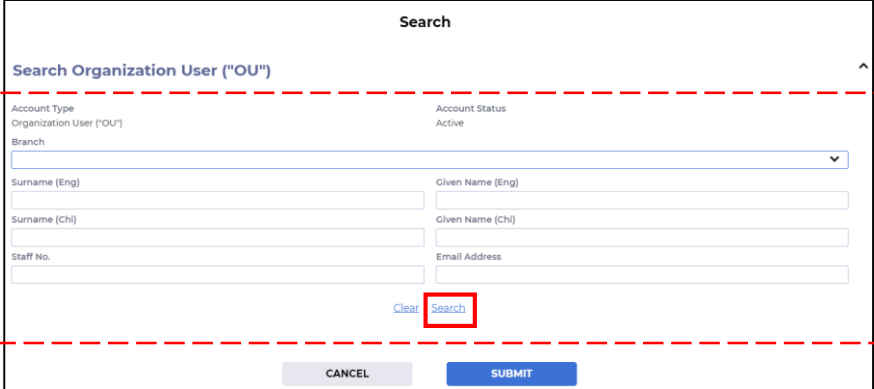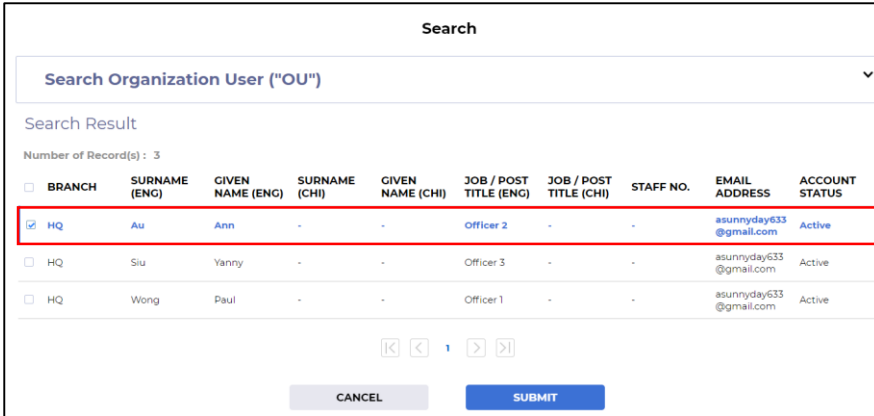
Item	Process	Related screenshots for reference
12.	**Assign court case(s) to OU Account(s)**[3] Scroll to the bottom of the page, click "Add" for case association type selection >	The "Assign court case(s) to OU Account(s)" screen is displayed
13.	**Assign cases by profile to OU** Select the option "By Profile" (i.e. case type) > Click "Search" >	The "Assign court case(s) to OU Account(s) – Case Association" screen is displayed

---

[3] For removal of assigned case profile(s) from OU(s), please refer to the step-by-step guide on **Assign court case(s) to OU Account(s) by PA/SA (by case profile).**

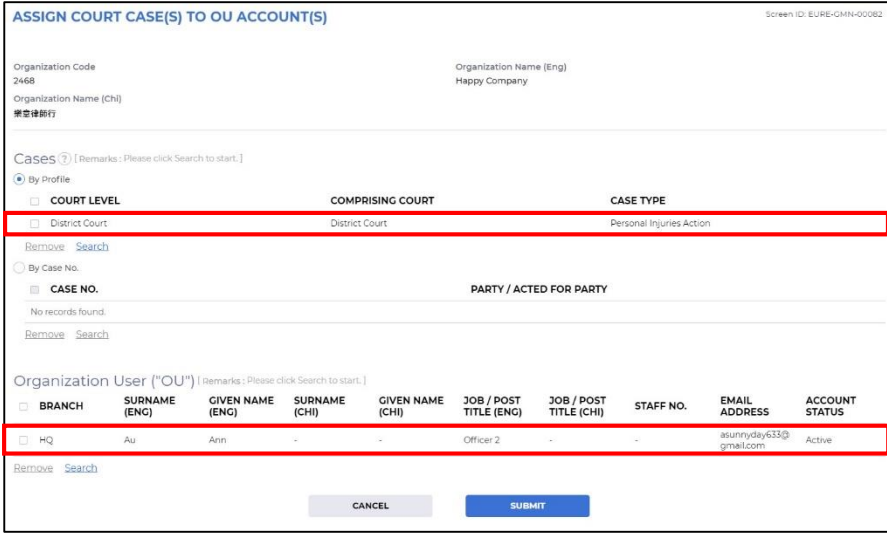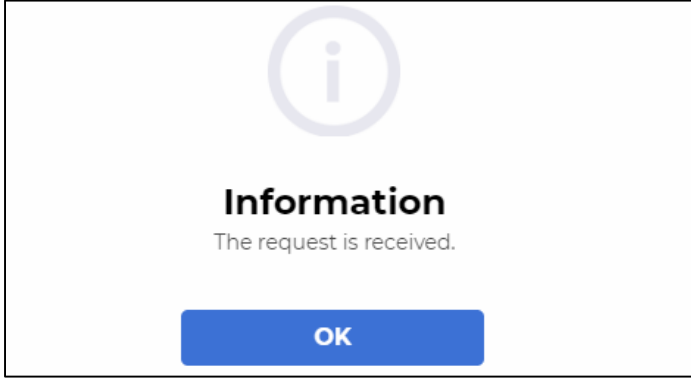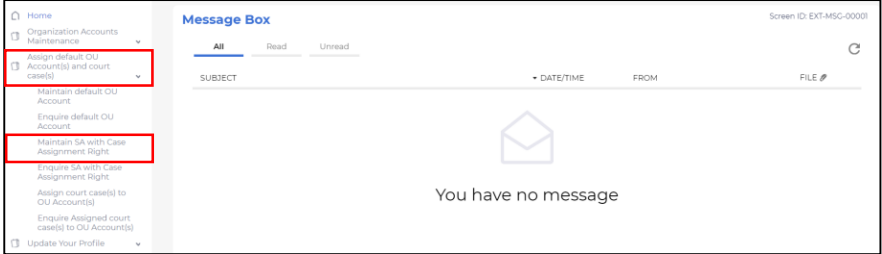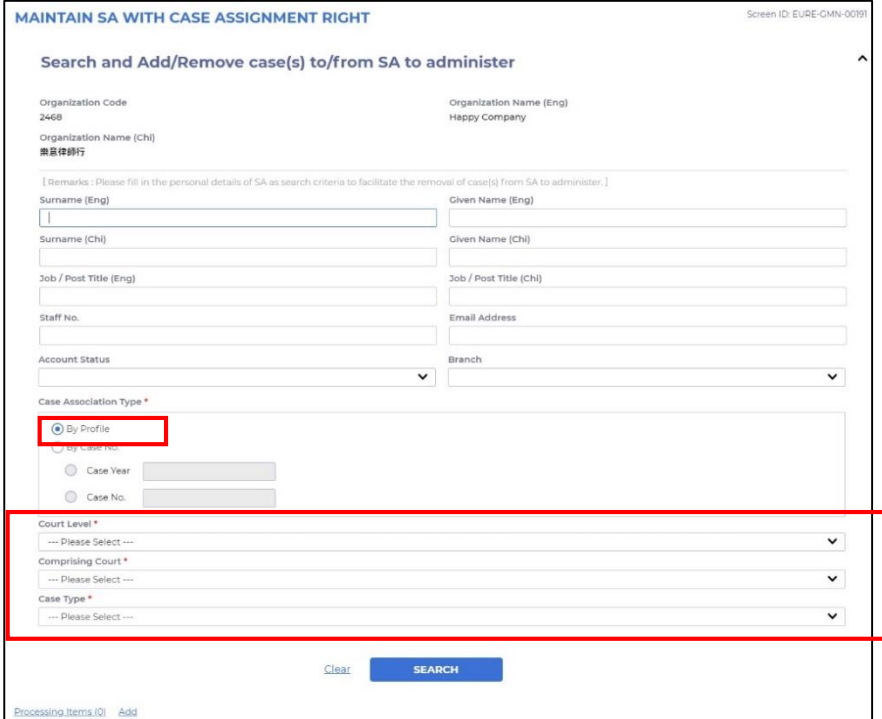| Item	Process	Related screenshots for reference
14.	**Select Court Level and Case Type** Select Court Level > *[Note: The Comprising Court is pre-set by the system according to the Court Level selected.]* Select the checkbox next to the Case Type(s) you want to assign > Click "SUBMIT" >	The "Search By Case Profile" screen is displayed **Search By Case Profile** Court Level * District Court ⌄ Comprising Court * COMPRISING COURT District Court Case Type * ☐ CASE TYPE ☑ Personal Injuries Action ☐ Tax Claim CANCEL SUBMIT
NOTE	*SA may select the checkbox next to "CASE TYPE" to select all available case types under the corresponding Court Level for assignment to OUs.*	
15.	**Search for an OU** Under "Organization User ("OU")" section Click "Search" >	The "Assign court case(s) to OU Account(s) – Organization User ("OU")" screen is displayed ASSIGN COURT CASE(S) TO OU ACCOUNT(S) Screen ID: EURE-GMN-00082 Organization Code Organization Name (Eng) 2468 Happy Company Organization Name (Chi) 東昰律師行 Cases ⑦ [Remarks : Please click Search to start.] ⦿ By Profile ☐ COURT LEVEL COMPRISING COURT CASE TYPE ☐ District Court District Court Personal Injuries Action Remove Search ○ By Case No. ☐ CASE NO. PARTY / ACTED FOR PARTY No records found. Remove Search Organization User ("OU") [Remarks : Please click Search to start.] ☐ BRANCH / SURNAME (ENG) / GIVEN NAME (ENG) / SURNAME (CHI) / GIVEN NAME (CHI) / JOB / POST TITLE (ENG) / JOB / POST TITLE (CHI) / STAFF NO. / EMAIL ADDRESS / ACCOUNT STATUS No records found. Remove Search CANCEL SUBMIT

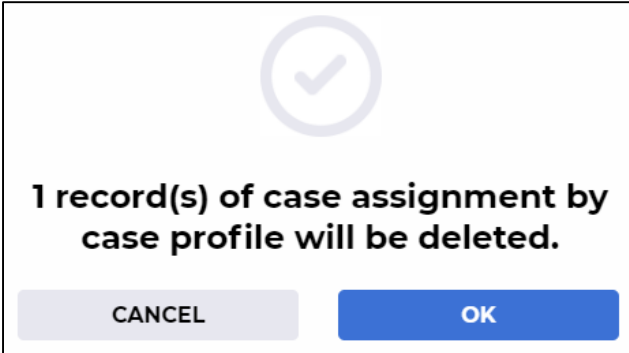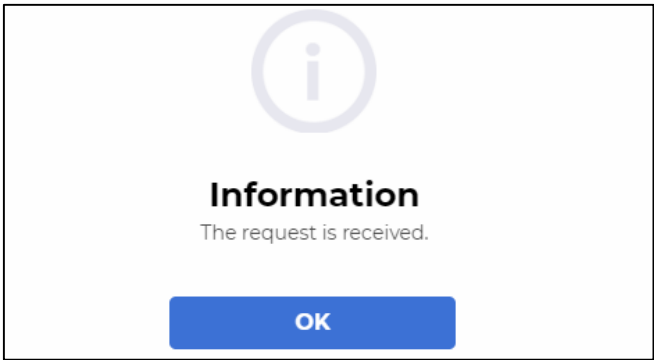| Item	Process	Related screenshots for reference
16.	**Input the search criteria to search an OU** Input search criteria > Click "Search" >	The "Search Organization User ("OU")" screen is displayed
17.	**Select the OU to whom cases to be linked-up by profile** Depending on the search criteria entered, the result will then display Select the checkbox next to the OU(s) you want to assign the selected case profile to > *[Note: SA may select more than one OUs to link-up with the selected profile(s)]* Click "SUBMIT" >	The "Search Result of Organization User ("OU')" screen is displayed
18.	**Confirm the options selected** Check the case profile selected in Item 14 and the OU(s) selected in Item 17 Then click "SUBMIT" >	All the selected options are displayed

Item	Process	Related screenshots for reference
19.	**Acknowledgement** Click "OK" to complete >	A pop-up message screen is displayed

Item	Process	Related screenshots for reference
Remove Case(s) from SA to administer (by profile)		
20.	**Assign default OU Account(s) and court case(s)** After logging in with a PA account, under Main Menu > Select Assign default OU Account(s) and court case(s) > Select Maintain SA with Case Assignment Right >	The landing page of PA Account is displayed
21.	**Search existing case assignment record with SA - By Profile** *[Note: From this screen, apart from inputting the required fields relating to Case Association Type, you may also input other search criteria (e.g. personal particulars of SA) to narrow down the search result.]* Select the option "By Profile" (i.e. case type) > Select Court Level > Select Comprising Court > Select Case Type > Click "SEARCH" >	The "Maintain SA with Case Assignment Right – Search and Add/Remove case(s) to/from SA to administer" screen is displayed

Item	Process	Related screenshots for reference
22.	**Search result shows in the record table -** Depending on the search criteria entered, the result will then display. **To delete the existing case assignment record** For the record which needs to be deleted, tick the checkbox next to the record and click "Delete" >	The search result – "List of SA with rights to administer cases (By Profile)" screen is displayed MAINTAIN SA WITH CASE ASSIGNMENT RIGHT Screen ID: EURE-GMN-00191 Search and Add/Remove case(s) to/from SA to administer List of SA with rights to administer cases (By Profile) Number of Record(s) : 1 (record: District Court, District Court, Personal Injuries Action, Li, Bobo, -, -, Team Supervisor (1), -, -, asunnyday633@gmail.com, Active)
23.	**Confirmation** A message listing out the number of record(s) of case assignment by case profile will be deleted pops-up. Click "OK" to confirm the selection >	A pop-up message screen is displayed **1 record(s) of case assignment by case profile will be deleted.** CANCEL OK
24.	**Acknowledgement** Click "OK" to complete >	A pop-up message screen is displayed **Information** The request is received. OK
NOTE	*If the case link-up arrangement to a SA is made by way of profile, the system will not be able to support removal of a specific case number from the SA, even though the concerned case comes from the same case profile.*	