

CMS Portal Instruction Guide

- Using alias accounts for legal practitioners acting on behalf of a prosecution agency

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Document Purpose

This guide explains how prosecution agencies can provide CMS Portal access to external legal practitioners who initiate matters on the agency's behalf.

This approach allows legal practitioners to access the prosecution agency's CMS Portal organisation while maintaining their existing legal practitioner account.

What is an Alias Account?

An alias account is an additional CMS Portal user account created using a variation of the practitioner's existing email address. For example:

Existing Account	Alias Account
jane.joe@abclaw.org.au	jane.joe+PA@abclaw.org.au

The alias account enables the legal practitioner to:

- Act on behalf of the prosecution agency when initiating matters.
- Receive notifications at their existing email address.
- Maintain separation between their prosecution agency role and their law firm role.

Using an email alias format (for example, jane.joe+PA@abclaw.org.au) allows notifications to continue being delivered to the user's existing email address, without the need to set up a separate mailbox.

When should an Alias Account be used?

An alias account may be appropriate when:

- A prosecution agency engages a legal practitioner or law firm to initiate matters on its behalf.
- The practitioner requires access to the agency's CMS Portal organisation.
- The practitioner needs to use the [Transitional Process for filing Charge and Summons](#).

Alias accounts are created at the discretion of the prosecution agency.

Before you create an Alias Account

Before creating access for an external legal practitioner, prosecution agencies should consider the following:

- ✓ The practitioner will receive access to your organisation within CMS Portal.
- ✓ Access and permissions should only be granted where appropriate for your agency's operational needs.
- ✓ The practitioner must understand when to use the prosecution agency account and when to use their own law firm account.
- ✓ Your agency is responsible for managing and reviewing user access and permissions. User permissions should be reviewed regularly, and access should be removed promptly when no longer required.

Creating an Alias Account

Step 1: Confirm the User Requires Access

Confirm that the legal practitioner requires access to initiate matters on behalf of your agency.

Step 2: Create an alias email format

Use the practitioner's existing email address and add "+PA" before the @ symbol. For example:

Original Email	Alias Email
jane.joe@abclaw.org.au	jane.joe+PA@abclaw.org.au

Step 3: Add the user to your organisation

Using your Organisation Administrator (Org Admin) permissions:

1. Sign in to CMS Portal.
2. Navigate to User Management.
3. Create a new user.
4. Enter the alias email address.
5. Assign the appropriate permissions for the user's role.
6. Save and activate the account.

Step 4: Advise the user of their access

Provide the practitioner with:

- Their alias account username.
- Details of the permissions granted.
- Instructions on when to use the alias account.

Using the Alias Account

Users should ensure they are signed into the correct account before taking any action in CMS Portal.

When initiating a matter on behalf of the prosecution agency:

1. Log in using the agency-linked alias account.
2. Complete the required filing activity.
3. Follow the Transitional Process for filing Charges and Summons where applicable.

When acting as a legal representative for their law firm:

1. Log out of the alias account.
 2. Log back in using their regular legal practitioner account.
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Example user instruction

You may provide the following guidance to legal practitioners acting on your behalf:

- To initiate matters on behalf of [Agency Name], please sign into CMS Portal using your agency-linked alias account.
- When acting on behalf of your law firm or another client, please log out and sign back in using your standard legal practitioner account.
- Using the correct account ensures you can access the appropriate files and permissions for the organisation you are representing.

Sample email template for prosecution agencies to send to legal practitioners once their Alias Account has been set up:

Subject: Your CMS Portal Agency Access Is Ready

Hi [Name],

Your CMS Portal alias account has now been set up to allow you to initiate matters on behalf of [Agency Name]. Please use this account whenever acting on behalf of our agency: **[insert alias email]**. Shortly you will receive an email with a link to activate this account - please follow the instructions before the link expires.

Important: When to Use This Account

Please use this alias account whenever you are:

- Initiating matters on behalf of [Agency Name]
- Performing actions within CMS Portal in your capacity as a representative of [Agency Name]
- Accessing matters associated with our organisation

Any changes to your engagement or access requirements are communicated to us promptly.

When acting in your capacity as a legal representative for your law firm or another client, please use your regular CMS Portal account and not your agency-linked alias account.

Switching Between Accounts

To ensure actions are performed under the correct organisation:

1. Log out of your current CMS Portal account.
2. Log in using the account appropriate to the work you are undertaking.
3. Confirm you are operating under the correct organisation before filing or accessing matters.

Please note that CMS Portal does not automatically switch between organisations. You must log out and back in when changing roles.

Filing Charges and Summons

If you are initiating matters on behalf of [Agency Name], please refer to the current [Transitional Process for filing Charge and Summons](#) and any agency-specific instructions provided to you.

If you have any questions or experience issues accessing the account, please contact **[agency contact details]**.

Kind regards,

[Name]

[Agency]

Frequently Asked Questions (FAQs)

Why can't the legal practitioner use their existing law firm account?

A legal practitioner's existing law firm account is associated with their law firm organisation. An alias account allows them to act within the prosecution agency's organisation and access the relevant functionality available to that organisation.

Will the alias account require a separate mailbox?

No. Using an email alias format (for example, jane.joe+PA@abclaw.org.au) allows notifications to continue being delivered to the user's existing email address, subject to their organisation's email configuration.

Will users need to remember two accounts?

Yes. Users will need to manage:

- Their regular legal practitioner account.
- Their prosecution agency alias account.

They should ensure they are signed into the correct account before commencing any CMS Portal activity.

Can a prosecution agency create alias accounts for multiple legal practitioners?

Yes. A prosecution agency may create alias accounts for multiple legal practitioners where there is a business need and appropriate approval has been obtained.

What permissions should be assigned?

Agencies should assign the minimum permissions required for the practitioner to perform their duties. Permissions should align with the practitioner's role and the agency's internal access management policies.

Can legal practitioners continue to file documents through their law firm account?

Yes. When acting for their law firm, practitioners should use their regular legal practitioner account. When initiating matters on behalf of the prosecution agency, they should use their agency-linked alias account.

Does creating an alias account make the legal practitioner a member of the **prosecution agency?**

No. The alias account only provides access to the prosecution agency's CMS Portal organisation and does not change the practitioner's employment or contractual relationship.

What happens if the practitioner no longer requires access?

The prosecution agency should:

1. Remove or deactivate the user's access within CMS Portal.
2. Review any permissions previously assigned.
3. Ensure access is revoked promptly in accordance with the agency's security and governance requirements.

Where can users find additional help?

For quick reference guides and “how to” short videos, users should refer to the [CMS Portal Help Centre](#) in the first instance:

- [Prosecution Agencies support resources](#)
 - [Transitional Process for filing Charge and Summons](#)
- [Legal Law Firms support resources](#)

For organisation-specific access questions, legal practitioners should contact the relevant prosecution agency directly.
