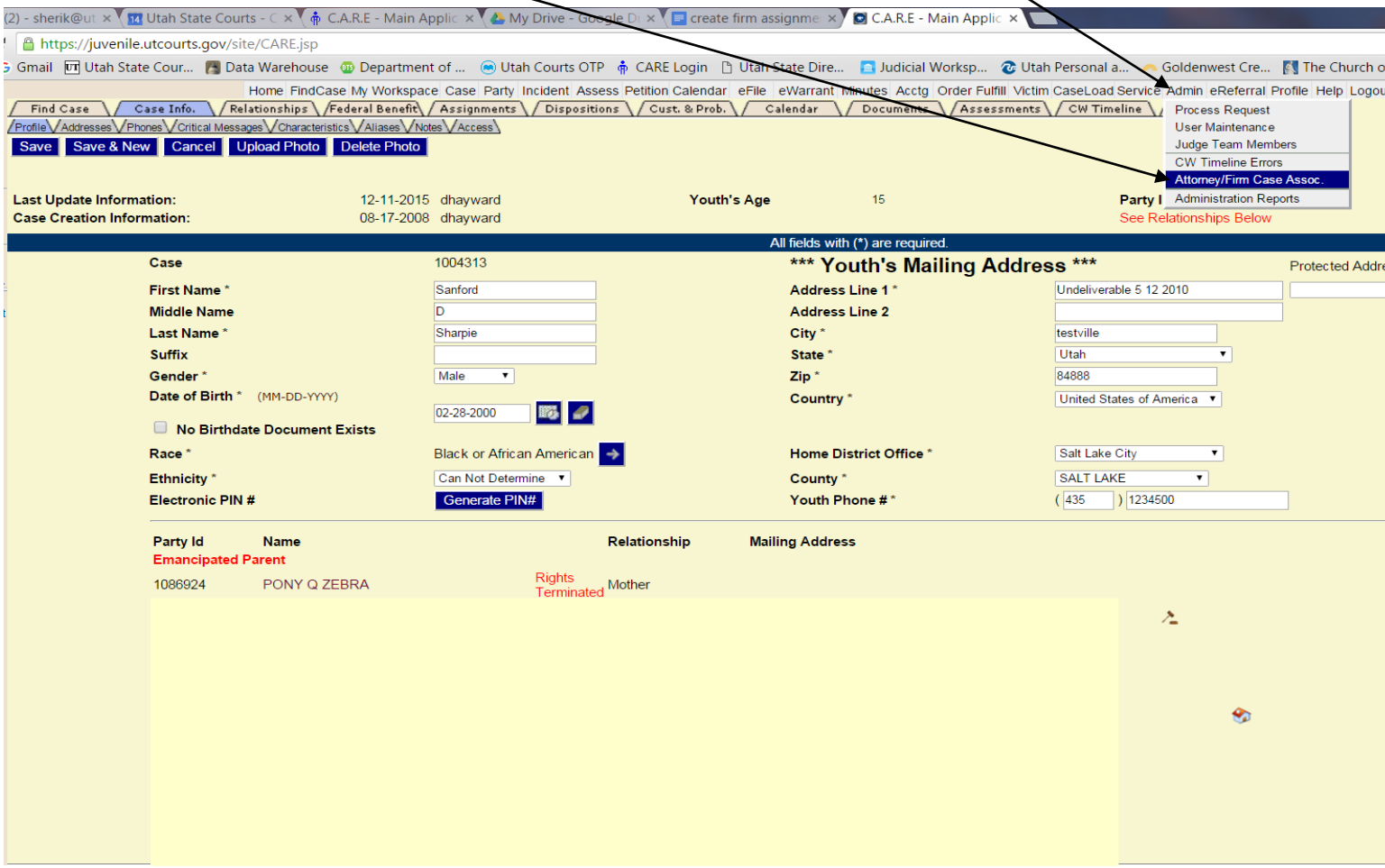
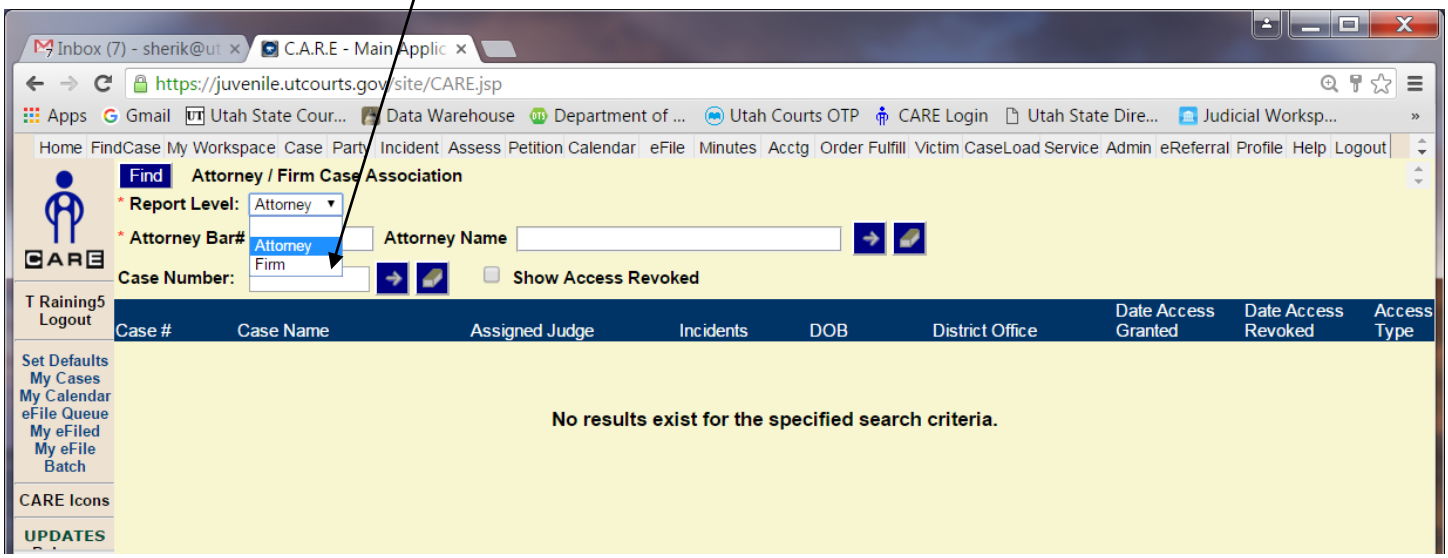
HOW TO TRANSFER/REVOKE ATTORNEY ACCESS TO MULTIPLE CASES

NOTE: Administrative Access is needed to perform this function.

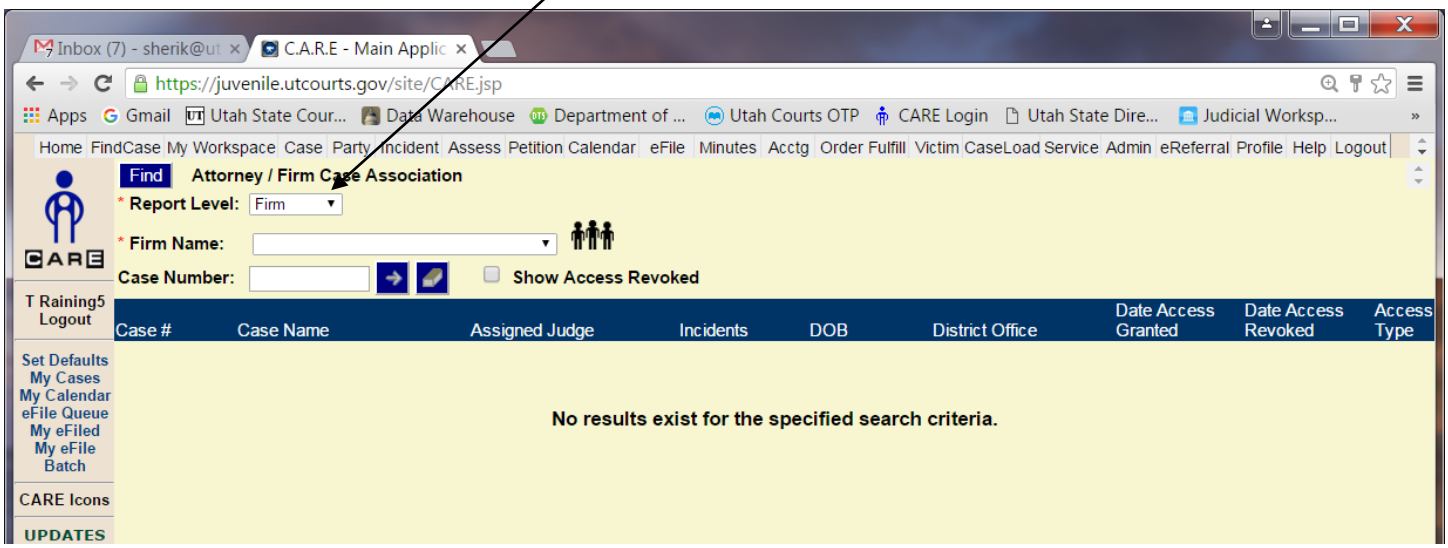
Attorneys can be added, edited or transferred by selecting the "Admin Applet" and then the Attorney/Firm Case Assoc. dropdown.



You will be directed to the Attorney/Firm Case Association screen. Click the drop down box next to Report Level and choose either Attorney or Firm. This will give you more specified search criteria. If you want to search by attorney, enter their bar number or name.

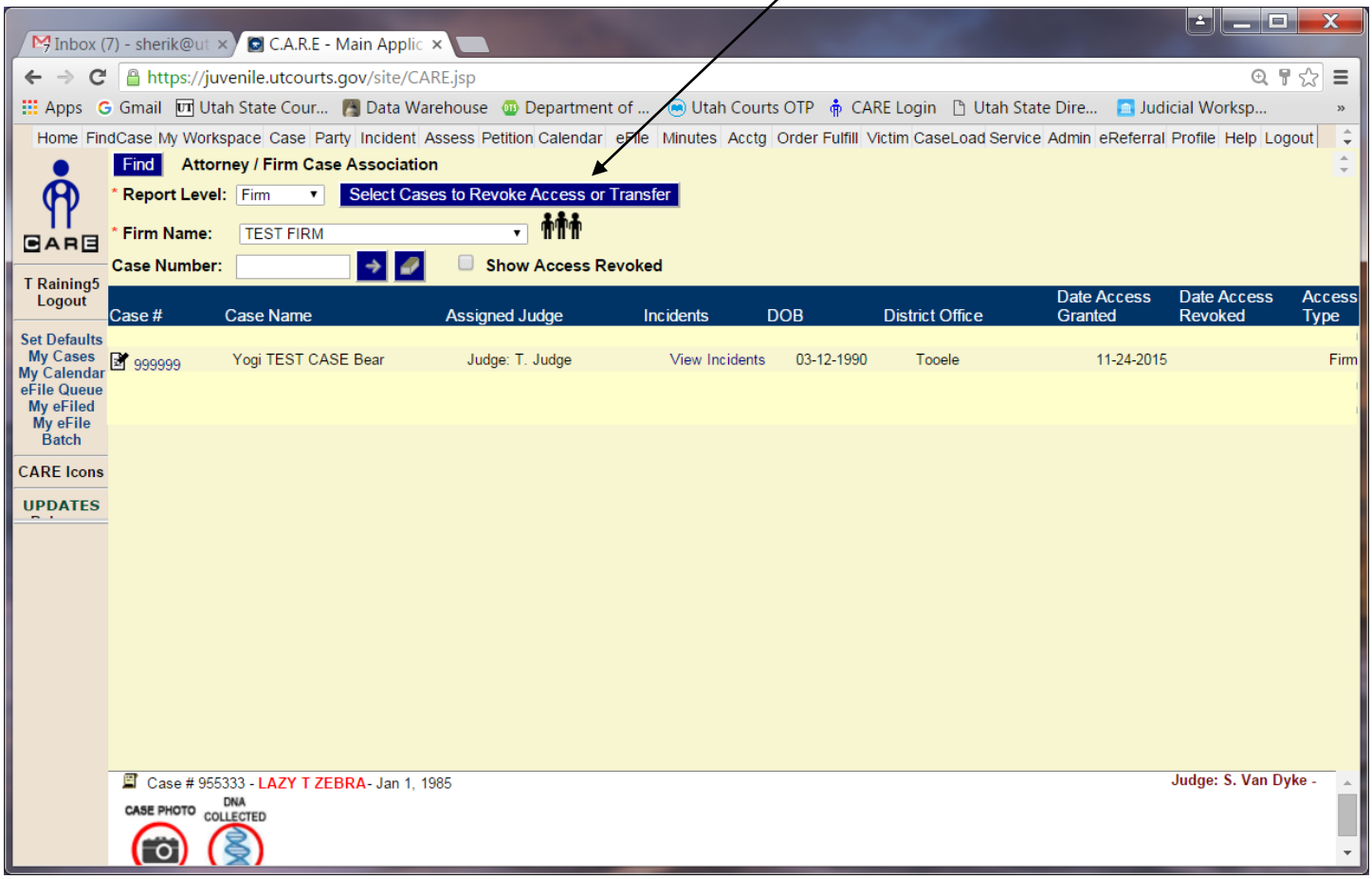


If you select firm you can choose your firm name from the drop down list.

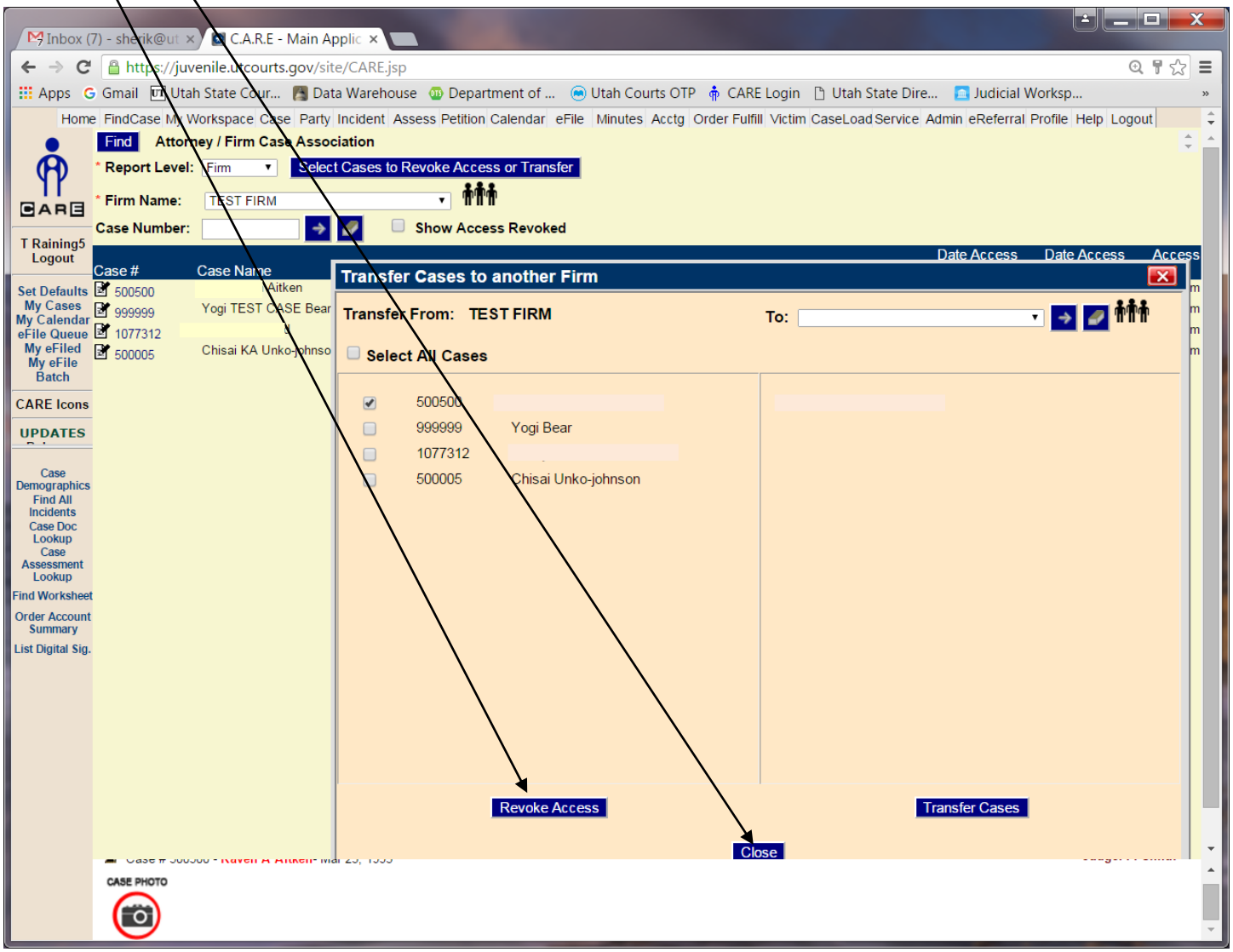


REVOKE ATTORNEY ACCESS

Once you have selected your firm click the "Select Cases to Revoke Access or Transfer" button.

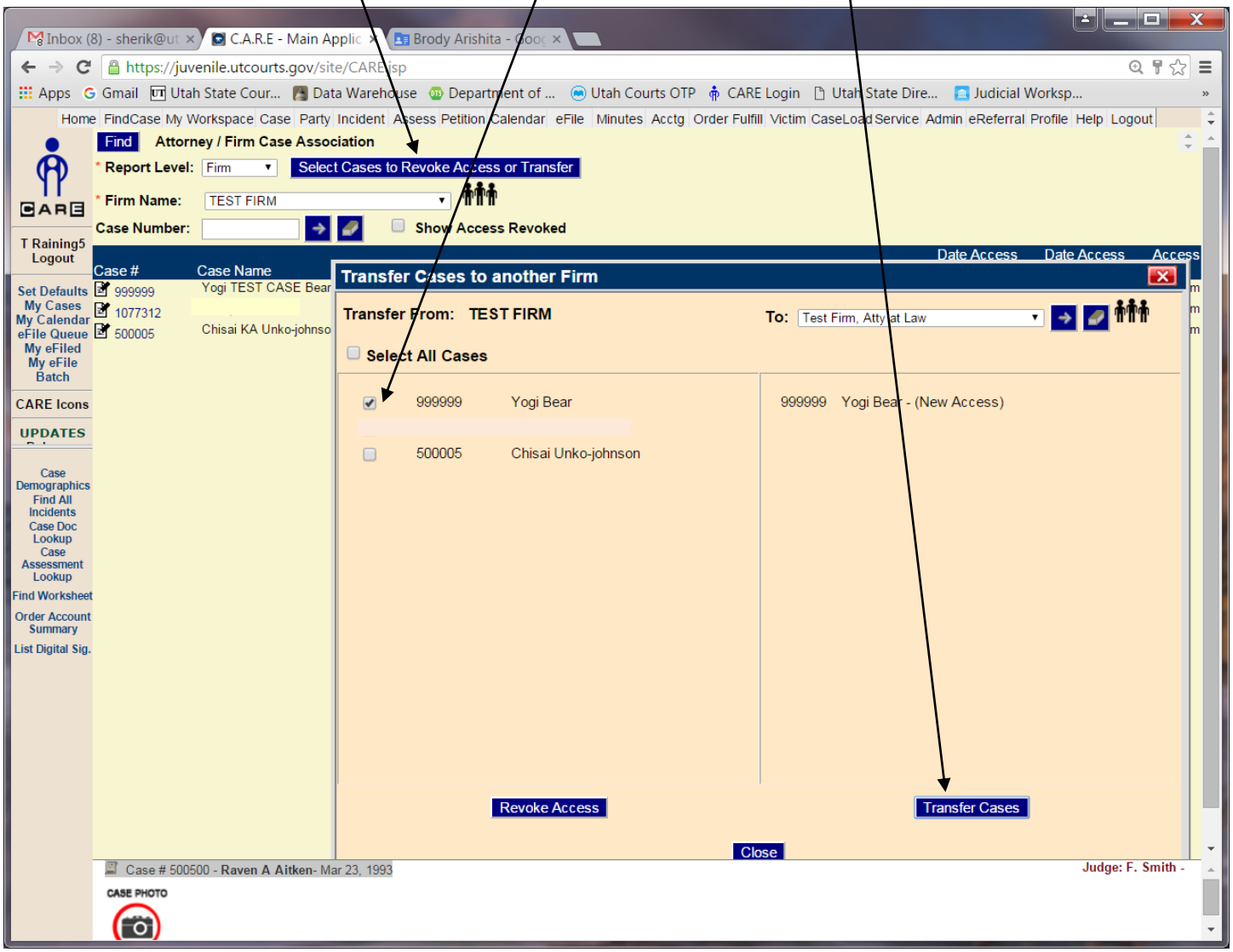
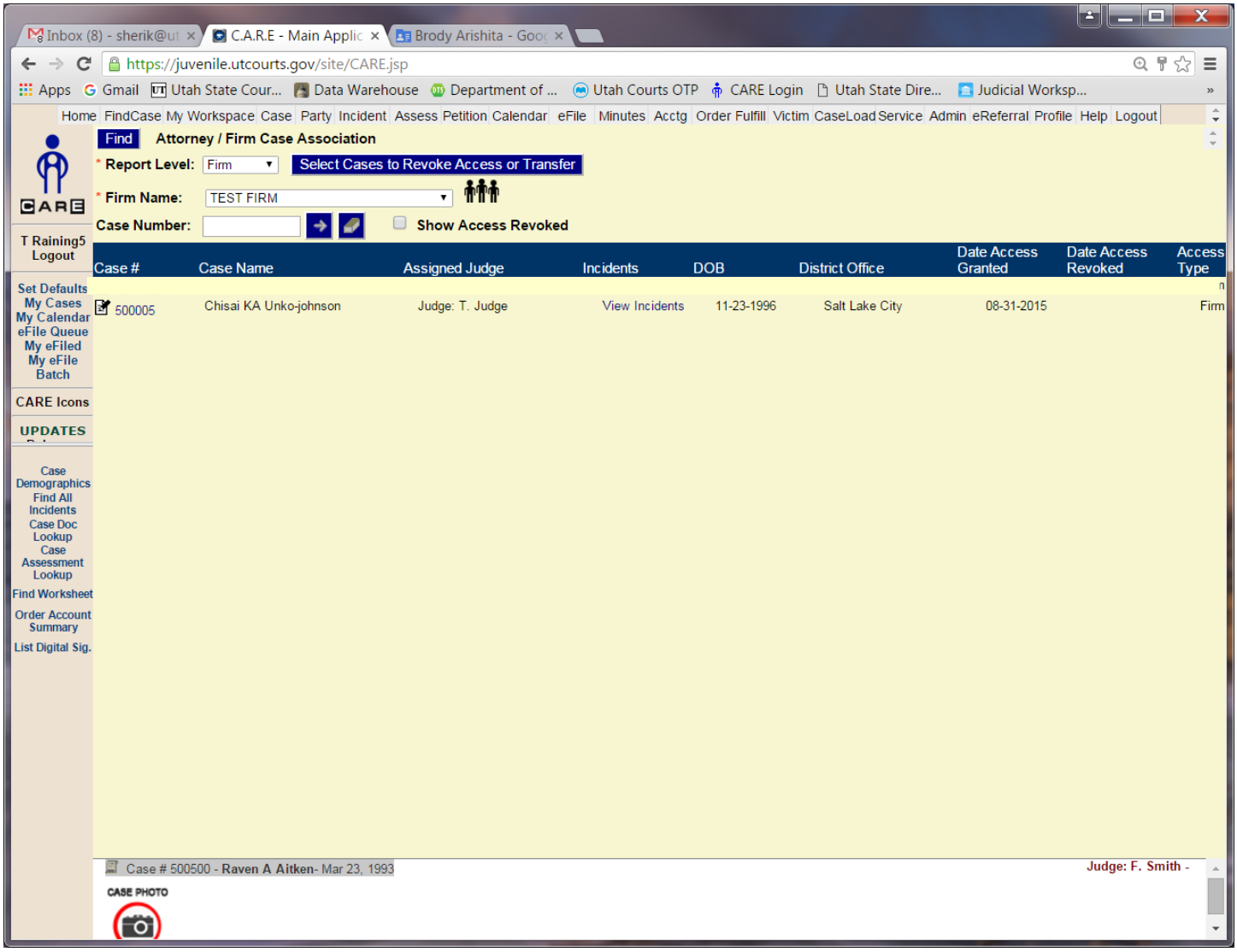


On the left side you will see all the cases that are assigned to that firm. Click the box to the left of the minor's name that you want to revoke attorney access and then click the "Revoke Access" button. It will move that case to the right side of the screen. If this is the correct case, click the "Close" button. You may also choose the box to select all cases.



TRANSFER CASES TO ANOTHER FIRM

Click the "Select Cases to Revoke Access or Transfer" button. Choose the firm that you are going to transfer the cases to. Click the box to the left of the case that you want to choose or click the box next to the Select All Cases. Click "Transfer Cases" button. The cases that you are transferring will appear on the right side. If these are the correct cases click the "Close" button.



The cases that you chose will no longer show on this screen as being associated to that firm.