

ADDING FIRM ADMINISTRATORS TO YOUR FIRM

To give another user within your firm administrative privileges (which allows them to approve or deny new users, add firm attorneys, edit firm information (name, address, phone number, whether administrator approval is required for new user registration), and edit payment account information), make them a firm administrator.

1. Click the orange "Actions" button. A drop down menu will appear. From this, select and click on "Firm Users"

The screenshot shows the efile Filer Dashboard for the Massachusetts Court System. The dashboard includes sections for 'My Filing Activity' and 'New Filing'. The 'Actions' dropdown menu is open, showing options like 'Dashboard', 'Start a New Case', 'File Into Existing Case', 'Filing History', 'Templates', 'Firm Service Contacts', 'Reports', 'Firm Admin', 'Firm Users', 'Firm Attorneys', 'Firm Information', 'Payment Accounts', and 'Help'. The 'Firm Users' option is highlighted with a red box.

2. Click the firm user you want to give administrative privileges to:

The screenshot shows the 'Firm Users' table with the following data:

First Name	Last Name	Email	Firm Status	Email Status	Roles
Joe	Attorney	joe.attorney.fir...	Approved	Active	Filer, Firm Admin
Jane	Attorney	jane.p.attorney...	Approved	Active	Filer

The row for Jane Attorney is highlighted with a red box, and the 'Actions' dropdown menu is visible for that row. Below the table, there is a 'Join My Firm' section with a URL: <https://massachusetts-stage.tylerhost.net/OfsWeb/UserModule/Registration?firm=bc5055>.

3. A box will appear at the bottom of the list of firm users containing information about the selected user:

Firm Users

First Name	Last Name	Email	Firm Status	Email Status	Roles	
Joe	Attorney	joe.attorney.fir...	Approved	Active	Filer, Firm Admin	
Jane	Attorney	jane.p.attorney...	Approved	Active	Filer	Actions ▾

10 items per page 1 - 2 of 2 items

First Name Jane **Middle Name** **Last Name** Attorney

Email jane.p.attorney@gmail.com

Roles
 Firm Admin Filer

Undo Save Changes

Join My Firm: .lerhost.net/OfsWeb/UserModule/Registration?firm=bc505560-45cc-49b6-80c1-44630ab766d7

4. Check the "Firm Admin" checkbox under the "Roles" section of the user information:

Firm Users

First Name	Last Name	Email	Firm Status	Email Status	Roles	
Joe	Attorney	joe.attorney.fir...	Approved	Active	Filer, Firm Admin	
Jane	Attorney	jane.p.attorney...	Approved	Active	Filer	Actions ▾

10 items per page 1 - 2 of 2 items

First Name Jane **Middle Name** **Last Name** Attorney

Email jane.p.attorney@gmail.com

Roles
 Firm Admin Filer

Undo Save Changes

Join My Firm: .lerhost.net/OfsWeb/UserModule/Registration?firm=bc505560-45cc-49b6-80c1-44630ab766d7

5. Click "Save Changes"

Firm Users

First Name	Last Name	Email	Firm Status	Email Status	Roles
Joe	Attorney	joe.attorney.fir...	Approved	Active	Filer, Firm Admin
Jane	Attorney	jane.p.attorney...	Approved	Active	Filer

10 items per page 1 - 2 of 2 items

First Name: Jane Middle Name: Last Name: Attorney

Email: jane.p.attorney@gmail.com

Roles: Firm Admin Filer

Undo Save Changes

Join My Firm: 1erhost.net/OfsWeb/UserModule/Registration?firm=bc505560-45cc-49b6-80c1-44630ab766d7

6. The user will now appear as a firm administrator:

Firm Users

First Name	Last Name	Email	Firm Status	Email Status	Roles
Joe	Attorney	joe.attorney.fir...	Approved	Active	Filer, Firm Admin
Jane	Attorney	jane.p.attorney...	Approved	Active	Filer, Firm Admin

10 items per page 1 - 2 of 2 items

Join My Firm: 1erhost.net/OfsWeb/UserModule/Registration?firm=bc505560-45cc-49b6-80c1-44630ab766d7

Should you encounter any problems giving a user firm administrator privileges and you are sure you have followed the previous steps correctly, please call Tyler Support at 1.800.297.5377

Please do not call the Clerk's Office with technical support related questions.