



Solicitors
Regulation
Authority

mySRA

**User Guide for Organisations, Authorised
Signatories and Organisation Contacts**

Contents

1. Introduction	3
• <u>What is an Authorised Signatory (AUS)?</u>	3
• <u>What is an Organisation Contact (ORC)?</u>	3
2. Logging in & My Organisations	4
• <u>General Details</u>	5
○ <i>Changing your organisation's name</i>	
○ <i>Changing or adding an organisation email address</i>	
○ <i>Opt in/out of offering a bulk renewal</i>	
○ <i>Head Office SRA ID number</i>	
○ <i>Add a trading name(s)</i>	
○ <i>Check who the Authorised Signatories are</i>	
○ <i>Work categories</i>	
• <u>Office details</u>	7
○ <i>Editing office address details</i>	
○ <i>Adding or removing branch office details</i>	
• <u>Related Individuals</u>	9
○ <i>Adding individuals as employees of your organisation</i>	
○ <i>Searching for individuals employed with the organisation</i>	
• <u>Related Organisations</u>	12
• <u>Organisation Contact</u>	13
○ <i>Add or remove Organisation Contacts</i>	
3. My Documents	14
4. Other Sections of MySRA	15
5. How to contact us	15

1. Introduction

What is an Authorised Signatory?

An Authorised Signatory (AUS) is a nominated individual eligible to sign an organisation's bulk renewal application and access the organisation details.

This can be a solicitor or registered European lawyer (REL) who holds a current practising certificate/registration and who holds the post of manager (a partner in a partnership; a member in an LLP; a director in a company). It could also be a solicitor or REL who holds a current practising certificate/registration and has a post within a 'commerce and industry' organisation.

The Authorised Signatory can nominate an Organisation Contact (ORC) to complete the bulk renewal application on behalf of their organisation. The AUS and the ORC will be the only individuals in the organisation that can access organisation details, including the bulk renewal application.

Note: To add the role of Authorised Signatory follow the instructions on adding a role within the mySRA for individuals [guide](#), and select the Authorised Signatory role.

What is an Organisation Contact?

An organisation contact (ORC) is the person nominated by the Authorised Signatory (AUS) to complete the renewal application on behalf of an organisation. There are no restrictions on who can be an ORC but the AUS should be satisfied they are suitable to complete this role on behalf of the organisation.

ORCs are able to view and update personal and professional profile information for those individuals who have opted in to the bulk renewal process at their organisation. They can also view and update organisation details.

Note: Guidance on activating and registering mySRA accounts can be found in the user [guides](#).

To add the role of Organisation Contact follow the instructions on adding a role within the mySRA for individuals [guide](#), and select the Organisation Contact role.

Once the role has been added it must be confirmed by the Authorised Signatory. You should follow the instructions on [page13](#) to do this.

2. Logging in & My Organisations

All of your organisations' profile information is available by logging into your own mySRA account.

Go to the mySRA login page, [here](#) and click the blue **Login** button.

Enter your username and password, click **Login**.

Tips:

Forgotten username:

- Click on **Forgotten username?**
- Enter your email address and press **Submit**
- Your username will be emailed to you

Forgotten password:

- Click on **Forgotten password?**
- Enter your username and press **Submit**
- A link will be sent to your email address
- Click on the link and then confirm your username
- Change your password

If you can't remember the email address held on your record please [Contact us](#)

Click **My Organisations** then click the **name of the organisation** whose details you want to change.



» My Services

» My Profile

» My Organisations



» My Documents

» Upload Documents

» Change password

My Organisations

My Organisation

In this section you can manage all of the information we have about your firm:

- > General Details – Change the firm name.
- > Office Details – Change addresses or add a branch office.
- > Related Individuals – Update your staff details.
- > Related Organisations – Add relationships with other firms.
- > Organisation Contacts – Add or remove an organisation contact.

- » General Details
- » Office Details
- » Related Individuals
- » Related Organisations
- » Organisation Contact

General Details

You can **edit** the name, address, trading names and contact details of your organisation. You can also select whether your organisation will submit a bulk practising certificate renewal application.

You can **view** who the Authorised Signatory is and **view** the work categories associated with your organisation.

To change the name of your organisation, edit the information in the text box provided and click **Save**.

Organisation Details (head office)

Organisation name

Example

Note: Changes to organisation names can take up to 7 days to be processed. You will receive a confirmation email once the changes have been authorised.

You can opt the firm in or out of offering a bulk renewal. To access the bulk renewal practising certificate application form during renewals your organisation **must** be opted into bulk renewal.

To opt your organisation out of bulk renewal, select **Yes** and click **Save**.

» My Services

» My Profile

» My Organisations

»

» General Details

» Office Details

» Related Individuals

» Related Organisations

» Organisation Contact

» My Documents

My Organisation's Profile

Organisation Details (head office)

Organisation name



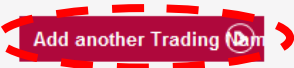
Example

SRA number

Registered number (Optional)



To add a trading name for your organisation click **Add another Trading Name**.

Organisation name (Optional) Example	
SRA number 567738	
Registered number (Optional)	
Contact Email <input type="text" value="example@test.org.uk"/>	
Opt out of PC Renewals (Optional) <input type="radio"/> Yes <input checked="" type="radio"/> No	
Do you want to add another trading name?	
	

Enter the new trading name.

Enter the start date for the trading name in the format **DD/MM/YYYY** or click the calendar symbol.

Click **Add Trading Name** to save.

Enter new trading name

Firm Trading Name - Start date

Add Trading Name > Cancel X

It will now appear in a table below.

Trading name(s)

Trading Name	Start Date	
Example123	12/09/2016	<u>Remove</u> X

Categories of work

You can view the work categories linked with your organisation. These are populated from the work categories each individual in your organisation has listed in their mySRA account.

To edit these each individual must edit their own work categories or you can follow the instructions in [related individuals](#).

Office details

You can view both the head office and branch offices associated with the organisation.

You can add a new branch office.

Click **Add Office**.

You can search for the office address by entering the post code and clicking **Search**.

The table below displays all the offices recorded for your organisation.

Office Name	SRA Number	Office Type	Office Address		
		Branch Office		Remove ✖	Edit ✎
		Head Office		Remove ✖	Edit ✎

Would you like to add any additional offices?

[Add Office](#) ➔

[Save](#) ✓ [Cancel](#) ✖

Office details

Country
UNITED KINGDOM ▼

Postcode
b1 1m

[Search](#) 🔍

Office type
--Select-- ▼

Select the office type e.g. Branch office and enter the date the office started trading in the format **DD/MM/YYYY** or click the calendar symbol.

Click **Save**.

Date office started trading
12/09/2016 📅

[Save](#) ✓ [Cancel](#) ✖

The new office will be displayed in the table.

You can remove an office by clicking **Remove** next to the office you wish to close.

Office Name	SRA Number	Office Type	Office Address		
		Branch Office		Remove ✖	Edit ✎
		Head Office		Remove ✖	Edit ✎

Would you like to add any additional offices?

Add Office ➤

Save ✓ **Cancel** ✖

Enter **Date Office Closed** in the format **DD/MM/YYYY** or click the calendar symbol to select the closed date.

Click **Save**.

You can edit head office and branch office information.

Click **Edit**. Make any changes in the relevant text boxes and click **Save**.

Tip: In **Edit** you are able to add a trading name.

Related Individuals

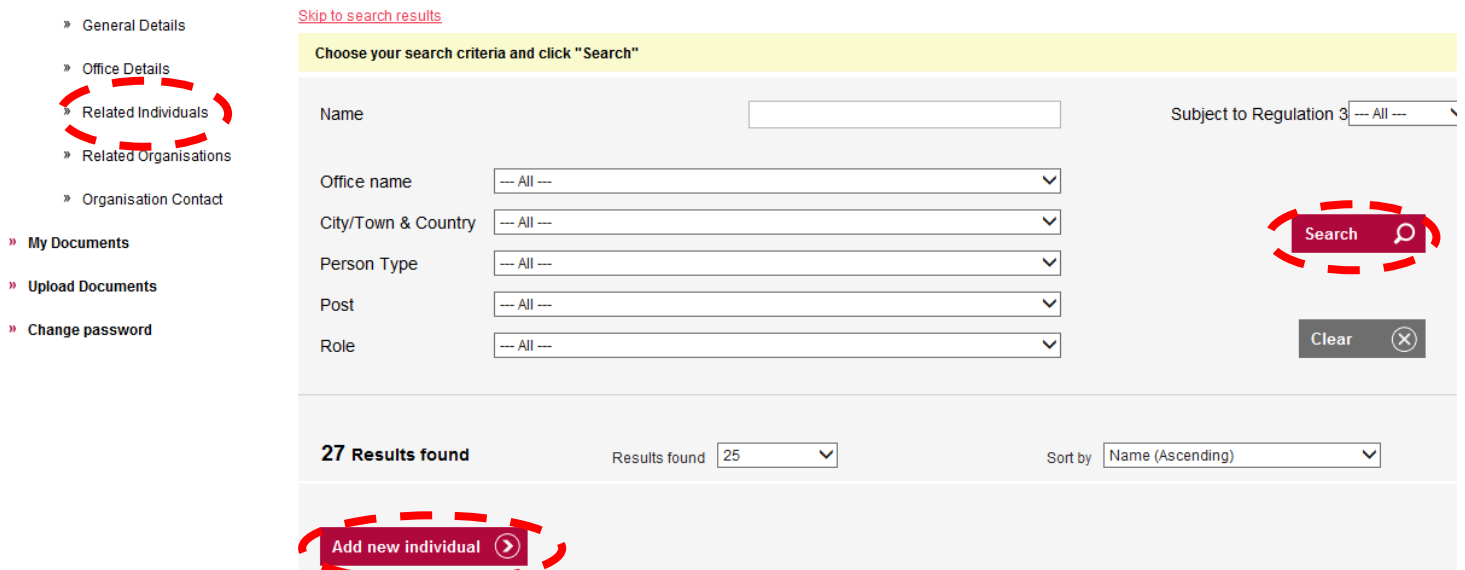
Click **Related Individuals**.

You can view and edit the **personal** and **professional** details of individuals who are opted into your organisation.

You can also view and edit the **professional** details of individuals who are associated with your organisation, but not opted in.

You can search and filter your results by selecting certain options from the relevant drop down list and clicking **Search**.

To view all individuals who are associated with the firm, leave each drop down list as ---All--- and click **Search**.



» General Details

» Office Details

» **Related Individuals**

» Related Organisations

» Organisation Contact

» My Documents

» Upload Documents

» Change password

[Skip to search results](#)

Choose your search criteria and click "Search"

Name

Subject to Regulation 3

Office name

City/Town & Country

Person Type

Post

Role

Search

Clear

27 Results found Results found Sort by

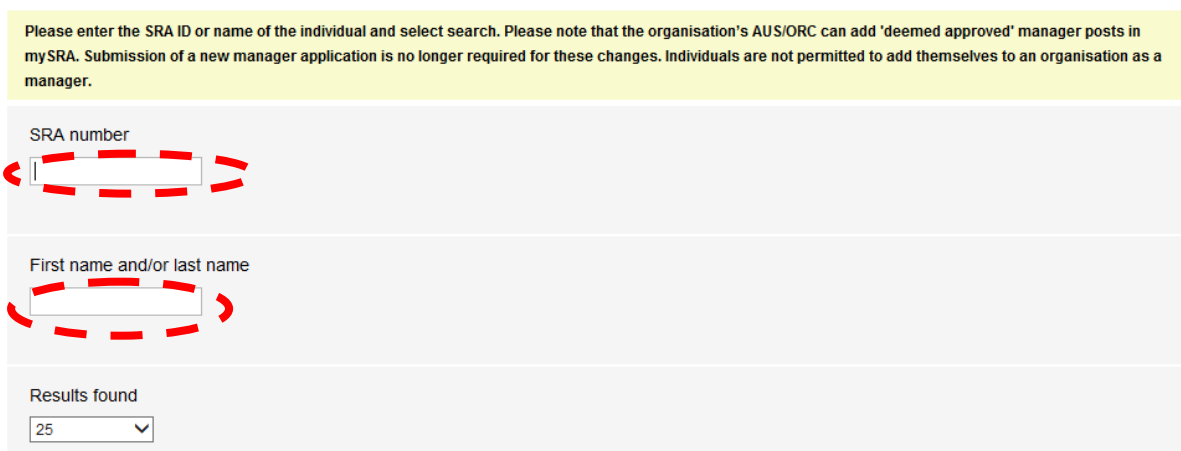
Add new individual

You will now be presented with a list of individuals.

You can add a new individual to the organisation

Click **Add new individual**.

Enter the name or SRA number of the individual and click **Search**.



Please enter the SRA ID or name of the individual and select search. Please note that the organisation's AUS/ORC can add 'deemed approved' manager posts in mySRA. Submission of a new manager application is no longer required for these changes. Individuals are not permitted to add themselves to an organisation as a manager.

SRA number

First name and/or last name

Results found

Search

Return to Search

Select the individual from the list and enter Date Employment Started in the format **DD/MM/YYYY** or click the calendar symbol to select the start date.



Click **Save**.

The screenshot shows a form with a date input field labeled "Date employment started" containing the placeholder "dd/mm/yyyy" and a calendar icon. Below the field are two buttons: "Save" (highlighted with a red dashed circle) and "Cancel". At the bottom is a "Return to Search" button with a right-pointing arrow.

Note: As AUS/ORC you are unable to opt an individual in to your organisation bulk renewal.

The individual must do this through their own mySRA account. Guidance can be found in the mySRA for individuals [guide](#).


Enter the date they are leaving/they left the organisation in the format **DD/MM/YYYY** or click the calendar symbol and click **Save**.

Name	SRA number	Welsh PC	Valid PC	Post	Role	Bulk Opt In	Main practice	
		N	Y	Director	Authorised Signatory, Authorised to Supervise, Training Principal	Y	Y	Edit  Left organisation 

If previously opted in to bulk renewal with this organisation, closing posts and roles currently associated with the organisation will also result in opting out of bulk renewal.

When leaving an organisation, please ensure that personal and professional address information is updated, to enable the SRA to maintain contact with you.

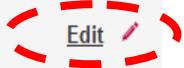

Date left the Organisation



Save  **Cancel** 

Note: By entering a leaving date and clicking **Save** the individual is removed from the organisation and their post and role(s) are closed.

You can edit an individual's details by clicking **Edit** next to the individual whose details you want to edit.

Name	SRA number	Welsh PC	Valid PC	Post	Role	Bulk Opt In	Main practice	
		N	Y	Director	Authorised Signatory, Authorised to Supervise, Training Principal	Y	Y	 Left organisation 

A series of tabs will appear. For guidance on how to edit the information in these tabs, please use the mySRA for individuals guide [here](#).

Personal Details | Personal Address | Email Addresses | Languages | Work Categories
Jurisdiction | Professional Details | Office | Posts | Roles

Note: As AUS/ORC you have the ability to add 'deemed approved' manager posts. To do this add or edit the individual and follow the guidance in the mySRA [guide](#) for individuals on '**How to add a post**'.

Related Organisations

This section is not currently active. There is nothing you need to do here.

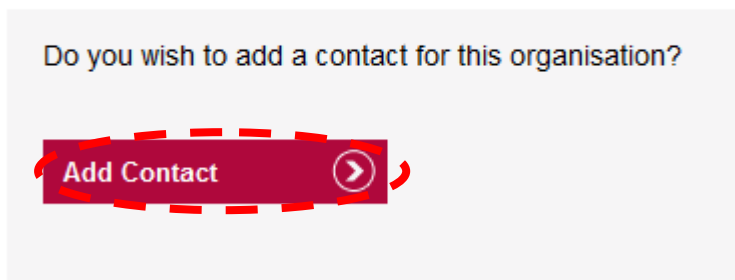
Organisation Contact

This section is only available to the Authorised Signatory. It will allow you to add or remove an Organisation Contact.

To add a new Organisation Contact, click **Add Organisation Contact**.

Organisation contact

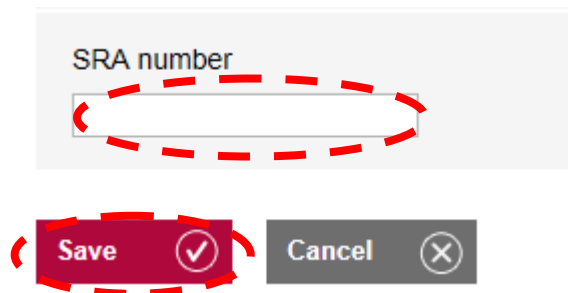
No records found.



Enter the SRA ID number of the new Organisation Contact.

This ID number can be found within the Related Individuals section of mySRA. See [page 9](#) of this guide.

Click **Save**.



Note: Both the AUS and ORC will now receive an email to confirm that the role has been added.

To remove an Organisation Contact, click **Remove** next to the individual you want to remove.

3. My Documents

You can view any documents that have been produced by us or any supporting documentation uploaded after an application has been submitted.

Click on **My Documents**, then click on **Organisation** and select your organisation from the drop down list.

Click **Continue**.

The image shows a navigation menu on the left with the following items: » My Documents, » Individual, » Organisation, » Upload Documents, and » Change password. The 'My Documents' and 'Organisation' items are circled with red dashed lines. To the right, a yellow banner contains the text: 'Please select an organisation from the drop down list below and click 'continue''. Below this is a 'Select Organisation' dropdown menu with a red dashed circle around the '--Select--' option. At the bottom, a red 'Continue' button with a right-pointing arrow is also circled with a red dashed line.

To filter the results by certain criteria, select an option from the relevant drop down list and then click **Search**.

To view all of the documents associated with the firm leave each drop down menu as ---All--- and click **Search**.

The image shows a search filter form with the following fields: Organisation name (text input with 'NOCKOLDS SOLICITORS LIMITED'), Name (text input), SRA number (text input), Post (dropdown menu with '--All--'), Document Type (dropdown menu with '--All--'), Practising Year (dropdown menu with '--All--'), Document Name (text input), Document Creation Date from (calendar icon and text input with 'dd/mm/yyyy'), and Document Creation Date to (calendar icon and text input with 'dd/mm/yyyy'). A red dashed circle highlights the 'Search' button with a magnifying glass icon. A 'Clear' button with an 'X' icon is located at the bottom right.

The other sections available within mySRA are covered in the mySRA for individuals user [guide](#).

5. How to contact us

Telephone

You can call our Contact Centre on 0370 606 2555 (inside the UK)
International callers +44 (0)121 329 6800

Opening hours

08.00 - 18.00; Monday, Wednesday, Thursday, Friday
09.30 - 18:00; Tuesday

Email

contactcentre@sra.org.uk

Post

Contact Centre
Solicitors Regulation Authority
The Cube
199 Wharfside Street
Birmingham, B1 1RN

DX 720293
BIRMINGHAM 47

Reasonable adjustments

Our reasonable adjustments policy is published on our website. If you have a disability under the Equality Act (2010) you can make a request for a reasonable adjustment. You can download a request form at [Contact us](#) and return it to us using our postal address or you can contact us by phone.