



# How to Assign Organizational Proxy Rights

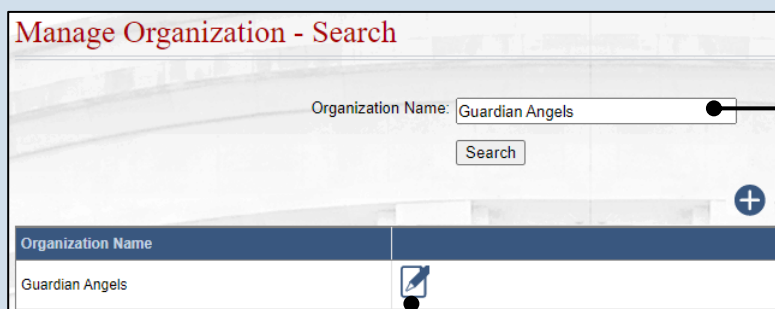
## 1. Open the Manage Organizations screen

Hover over the My Services menu and click the 'Manage Organizations' option.



## 3. Access an organization

Identify the organization you want to add the prospective proxy to and click the Edit Record icon.



## 2. (Optional) Search for the organization

On the Manage Organization – Search screen, enter the name of the organization in the **Organization Name** field and click the SEARCH button.

## 5. Select a Search Type

In the Add Organization User popup, click on the **Search Type** dropdown and select 'Name or 'PA Bar ID'.

Account Name	User Name	Email Address	Roles	Proxy Rights	Date Added	
mikeerdman	Erdman, Mike	gtstestuser-joeguardian7@yahoo.com		Create Reports Submit Reports	05/01/2018	
dantest11	Schweier, Daniel	Daniel.Schweier@pac...		Create Reports Submit Reports	08/30/2018	

## 4. Access the Add Organization User screen

On the Manage Organization screen, click the Add New Record icon above the Organization Users grid.

**Tip** Use the 'Name' option to find an attorney or non-attorney. The 'PA Bar ID' search only applies to attorneys and is only useful when you know their bar number.

**Tip** You can only search for individuals who have a UJS Web Portal account.

## 6. Enter your search criteria

Depending on the selected search type, enter the required information related to the prospective proxy

**Tip** When prompted to enter a **City**, enter the city where the proxy works.

## 7. Click SEARCH

# How to Assign Organizational Proxy Rights



## 8. Confirm the individual

When your search results are displayed, locate the appropriate individual and select the checkbox next to their name.

Account Name	User Name	Email Address	Location	PA Bar Number
<input checked="" type="checkbox"/>	dfuller	Fuller, Dominic	dfuller@guerrillamail.com	Anytown, PA

9. Click SUBMIT

## 10. Click the Edit User Proxy Rights icon

In the Organization Users grid, click this icon for the individual you just added.

Account Name	User Name	Email Address	Types	Proxy Rights	Date Added	
mikeerdman	Erdman, Mike	gtstestuser-joeguardian7@yahoo.com		Create Reports Submit Reports	05/01/2018	
dfuller	Fuller, Dominic	dfuller@guerrillamail.com		None	11/16/2022	

## 11. Assign proxy permissions

In the Manage User Proxy Rights popup, locate the individual and select the appropriate permissions for that proxy.

Proxy Right Category	Proxy Right Name
<input type="checkbox"/> Organization Management	Access Management User
<input checked="" type="checkbox"/> Guardianship Management	Create Reports
<input checked="" type="checkbox"/> Guardianship Management	Submit Reports

12. Click SUBMIT

- **Access Management User** – Provides the authority to administer the privileges of all proxies in the organization. This privilege designates an individual as an AMU.
- **Create Reports** – Provides the authority to complete new reports on behalf of the organization. This does not grant the right to submit these reports.
- **Submit Reports** – Provides the authority to complete, submit and, when necessary, pay for the filing of a report. This includes reports filled out by any other proxy in the organization.