

Application to change the details of a representative in a pending case pursuant to Rule 16.1(b) of the Rules governing the Registry

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## User Guideline

Date : 05/12/2023

### Introduction

The UPC hereby informs users of the possibility to change details of a representative, according to the CMS functionality described below. This functionality is available in relation to details entered either in the context of a registration as representative, or in the context of cases pending before the Court.

This functionality can be found under the tab “**Applications and requests**” under the following option: “**Application to change the details of a representative in a pending case pursuant to RgR16.1(b)**”.

#### 1. Background

Information on representatives, including name, address, email, is entered in various stages of proceedings before the Court, or use of the CMS.

The need to change details of a representative may arise under the following circumstances:

1. A representative wishes to change details entered when **creating the account** on the CMS;
2. A representative wishes to change details entered when **registering as a representative**;
3. A representative wishes to change details entered in **a pending case**.

Different conditions apply, depending on the situations mentioned above, and different procedures must be followed.

#### 2. Changing details entered when creating the account on the CMS

If a representative wishes to change details entered when creating the account on the CMS the following applies:

**It is not possible to change the name of the representative or the CMS account email address.** The name and email address are fundamentally necessary for strong authentication which allows the user to access and work on the CMS. To make such a change, the representative must create a new account with the new name and/or email address.

**All other details on the CMS account such as address and telephone number may be changed** by the representative holding the CMS account, by using the functionality "Edit my account".

### 3. Changing details entered when registering as a representative

If a representative wishes to change details entered when registering as a representative, an Application pursuant to RgR16.1(b) must be made to record such changes. The changes will be automatically entered on the list of representatives.

To do so, once accessing the Application pursuant to RgR16.1(b), on the Start task, the representative must choose between the two options provided – choosing “Details in the list of registered representatives”. Then the **CMS case number of the representative registration- see figure 1 - is to be entered. This number will be automatically displayed when filling in the relevant CMS number on the representative’s registration.**

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General guidance for changes to representative's details

1. If a representative wishes to change details entered when creating the account on the CMS the following applies.
  - a) It is not possible to change the name of the representative or the CMS account email address. The reason for this is that the name and email address are fundamentally necessary for strong authentication which allows the user to access and work on the CMS. To make such a change the representative must create a new account with the new name and/or email address. If the reason for the change to the email address is a change of representation (e.g. representative changes firm) an Application to change representation pursuant to RoP293 should also be made in respect of each relevant pending case. A change of representation will also require an Application pursuant to RgR16.1(b) to change the details recorded in the list of registered representatives.
  - b) All other details on the CMS account such as address and telephone number may be changed by the representative accessing the CMS account and pressing the "Edit my account" button.
2. If a representative wishes to change details entered when registering as a representative an Application pursuant to RgR16.1(b) must be made recording the changes. The changes will be automatically entered on the list.
3. If a representative wishes to change details entered in a pending case then an Application pursuant to RgR16.1(b) must be made for each such case separately, again recording the changes. The changes will automatically be entered in the pending case.

Details to be changed:

Enter below as CMS case number the number of the pending case or if applicable the number of the Application for registration as a representative.

CMS case number: \*

Figure 1- start of functionality to change the Details in the list of registered representatives

#### Steps-by-step process:

1. After starting the workflow, the representative will be prompted to enter any new details as applicable. The CMS will automatically show **the existing representative’s details which may be edited**. If there is a change of name, a signed personal ID document must be uploaded, along with an application document.
2. **Upload documents task:** the CMS will prompt the user the mandatory documents to be uploaded. The mandatory documents are an Application supporting the change and, if applicable, the personal ID document (in case of name change).
3. The CMS **automatically updates the details in the list of registered representatives** and such details will be automatically available to the public.

Please note that the entitlement for representation before the UPC, under which the original registration was made cannot be changed using the Application under RgR16.1(b).

#### 4. Changing details of a representative in a pending case

If a representative wishes to change details entered in a pending case, an Application pursuant to RgR16.1(b) must be made for each such case separately, recording the changes. The changes will automatically be entered in the pending case. Please note representative's information as they appear in related proceedings will also be automatically updated once changes are entered on the main proceeding.

To make changes, once accessing the Application pursuant to RgR16.1(b), on the Start task, the representative must choose between the two options, choosing the option of **changes in a pending case**. The representative then enters the relevant CMS case number of the desired proceeding and then starts the Application.

##### Step-by-step process:

1. In the **Personal details task** the representative must enter any new details. The CMS will automatically show the existing details of the representative, which may be edited as required. If there is a change of name of the representative - either first name or last name - a personal ID document must be uploaded. **Please note that an actual change of the representative in a case must be done via an application under RoP293.**
2. In the **Address for service task**, the representative can amend both the name of the person entitled to accept service, as well as the address and electronic address for service. The fields in this task are precompiled with the existing details.
3. In **Upload documents task**: the mandatory documents to be uploaded are an Application document, **in which it is advised to explain the changes performed** (preferably indicating the original data and the updated data) and, if applicable, a personal ID document (in case of name change).
4. The CMS updates the details in the pending case as an automatic task (also in related proceedings).