



Direct Access Portal

Direct Access Portal User Guide for Chambers Professionals

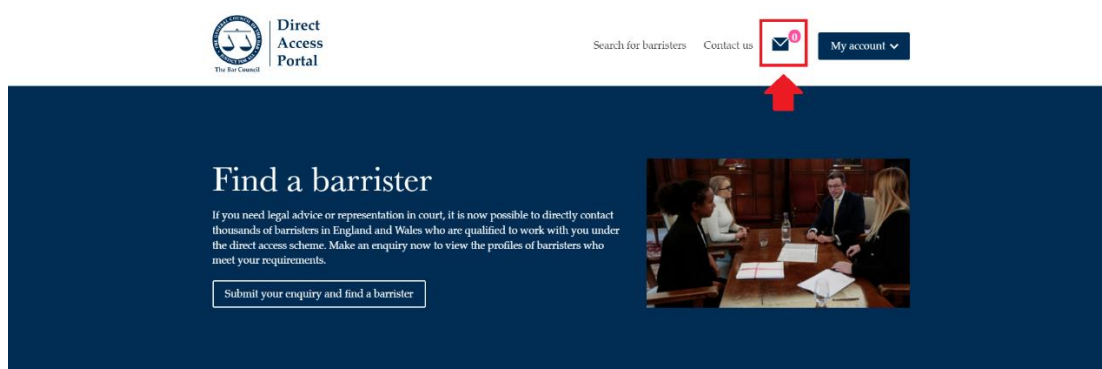
Version 1.0 – 5 February 2024

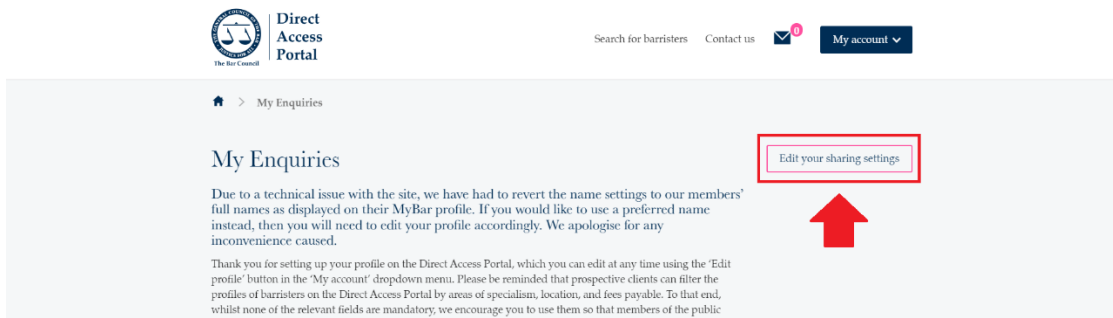
Can I add one of my members to the Direct Access Portal?

1. Chambers professionals are not able to add barristers to the [Direct Access Portal](#).
2. We give barristers automatic access to the Direct Access Portal if they have:
 - a. a current practising certificate, and
 - b. completed the relevant training and been authorised as a direct access practitioner, and
 - c. subscribed to the Bar Representation Fee.
3. If one or more of your members meet the criteria above, then they will be able to log in to the Direct Access Portal through their [MyBar account](#) and set up their profile.

Can I access my members' accounts?

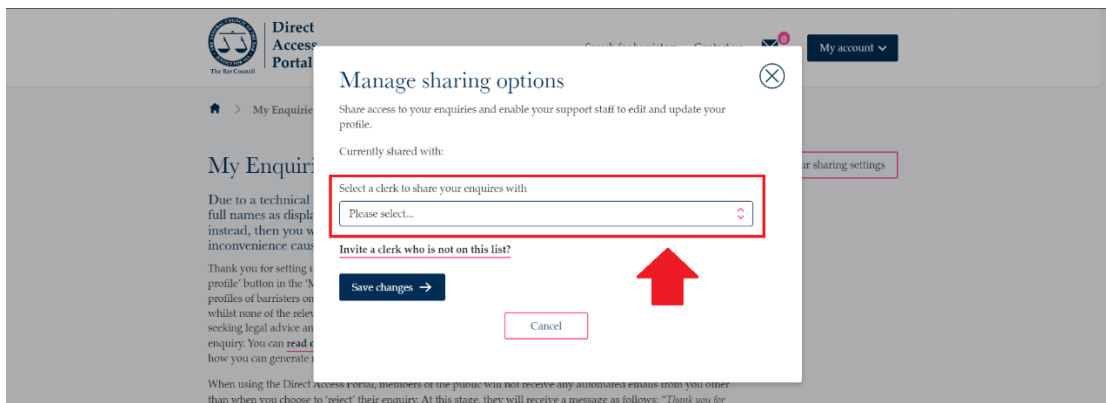
4. Yes, once a member of your organisation has set up their profile on the Direct Access Portal, they can choose to share their account with one or more of their support staff.
5. To share their account with you, they must:
 - a. click on the small envelope icon on the homepage, then
 - b. click on 'Edit your sharing settings'.





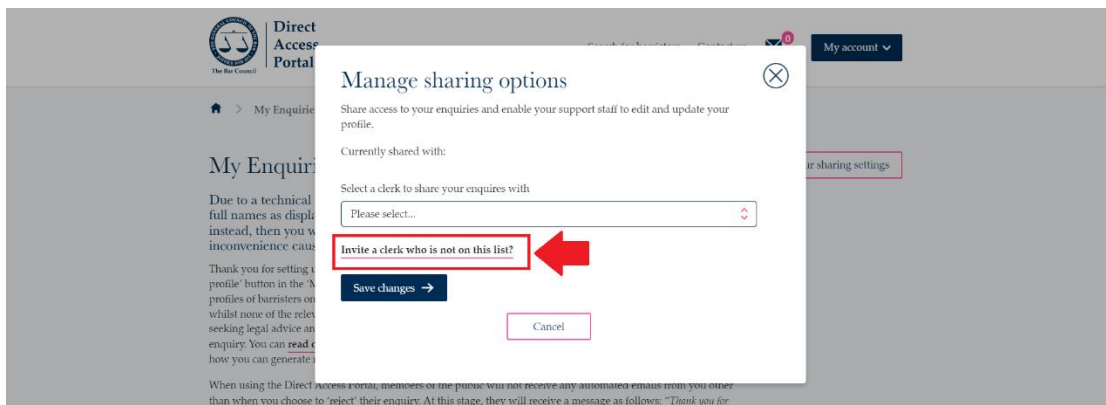
6. At this point, a 'Manage sharing options' pop-up box will appear for them.

7. If you already have a MyBar account that indicates you are working from the same organisation as your member, your name will be included in the 'Select a clerk to share your enquiries with' dropdown menu.



8. Once they have selected your name, they will need to click 'Save changes'. You will then receive an automated email notifying you of the change.

9. If your name does not appear on the dropdown menu, your member can request to add you to MyBar and their account using the 'Invite a clerk who is not on the list?' option.



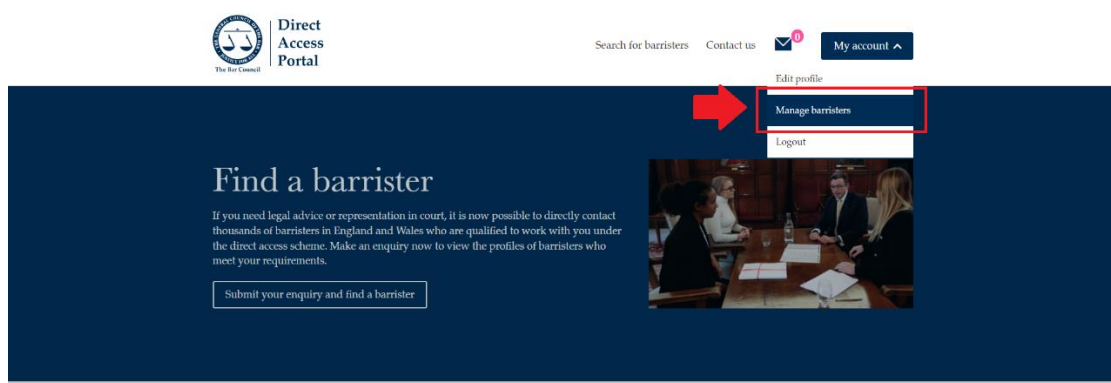
10. Once the Services Team has set your account up, they will contact you by email notifying you of the change.

What can I do on the Direct Access Portal?

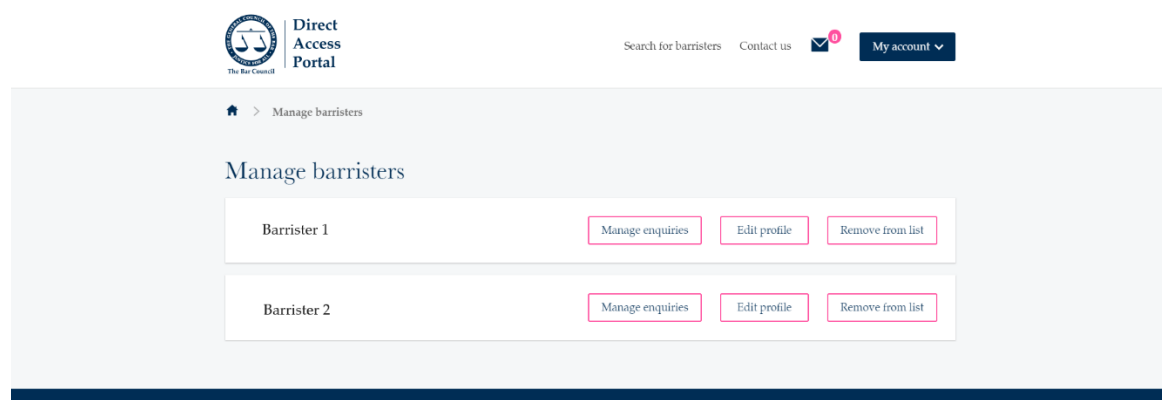
11. Once you have been given access to one or more of your members' accounts, you will be able to:

- a. Manage their enquiries on their behalf, and
- b. Edit their profile, and
- c. Remove them from your account (if, for example, they leave your organisation).

12. To do either of the above, you must select 'Manage barristers' from the 'My account' dropdown menu.

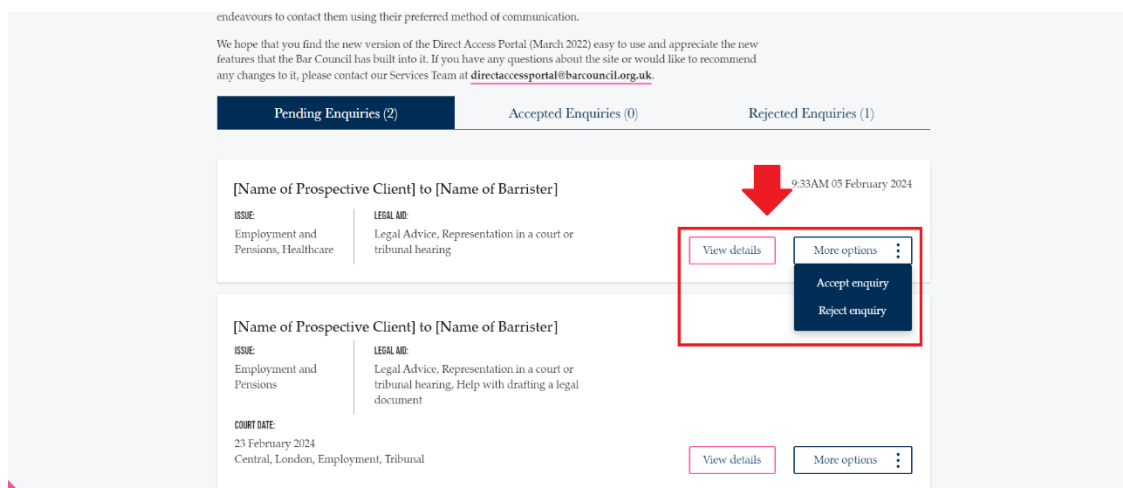


13. You will then see a list of the members who have chosen to share their accounts with you and be able to select from the options set out under **paragraph 11** above.



Managing enquiries

14. When one of your members receives a new enquiry through the Direct Access Portal, both you and they will be sent an email notification.
15. To manage one of your members' enquiries, log in to the Direct Access Portal through your MyBar account and follow the process set out under **paragraphs 12 and 13** above, selecting the 'Manage enquiries' option next to their name.
16. From the page that appears, you will be able to:
 - a. view the details of 'Pending Enquiries', and
 - b. either accept or reject them on behalf of your member.



Notes: You cannot send emails through the Direct Access Portal and will therefore need to use the contact details that the prospective clients have provided you with to progress their enquiry once accepted.

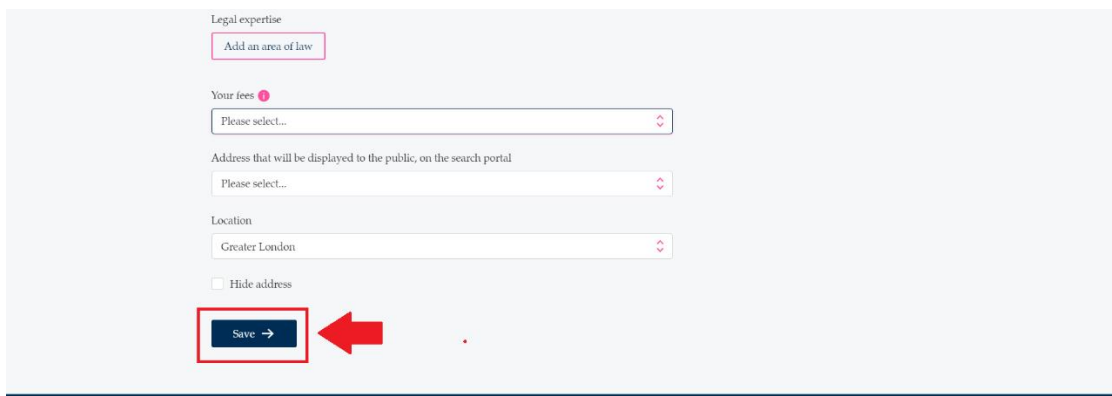
When rejecting enquiries, you will be given the option to reject them due to lack of availability, lack of expertise, or a miscellaneous reason. At this stage, the prospective client will receive an automated message that reads:

"Thank you for using the Direct Access Portal to find and instruct a barrister. Unfortunately, [name of barrister] is unable to take on your case. Please return to the Direct Access Portal search function to see if another barrister can meet your needs".

The Direct Access Portal has not been set up as an electronic storage facility and the client data contained within it will therefore be held for a maximum period of three months. You will receive email notifications from the site if one or more of your enquiries is due to expire.

Editing profiles

17. To edit a member's profile, log in to the Direct Access Portal through your MyBar account and follow the process set out under paragraphs 12 and 13 above, selecting the 'Edit profile' option next to their name.
18. All the information about completing profiles can be found on the page that appears. Take care to click 'Save' to publish your changes.



The screenshot shows a profile editing form with the following fields and options:

- Legal expertise:** A text input field with the placeholder "Add an area of law".
- Your fees:** A dropdown menu with the placeholder "Please select...".
- Address that will be displayed to the public, on the search portal:** A dropdown menu with the placeholder "Please select...".
- Location:** A dropdown menu with the selected value "Greater London".
- Hide address:** A checkbox that is currently unchecked.
- Save:** A blue button with a white right-pointing arrow, highlighted by a red rectangular box. A red arrow points from the right towards this button.

Notes: When adding a new area of law or editing an existing one, take care to click 'Add area of law' *in addition* to clicking 'Save'.

Legal expertise

Add an area of law


Add an area of law

Area of law *

Please select...

Describe your experience in this area of law *

Add area of law →



Where do I go to for technical assistance?

19. For technical assistance and other enquiries relating to the Direct Access Portal, please contact the Services Team at directaccessportal@barcouncil.org.uk.

Version control

Date	Version	Description of Changes
05.02.2024	1.0	First version launched.