



## EFIS Guidance for Legal Professionals

The PSC discourages users from sharing user credentials with others individuals. Certain contact types, such as attorneys, data request contacts, case consultants, and official representatives are given a greater level of user functionality along with increased data access, including access to confidential and highly confidential documents. **Sharing user credentials with others may put data at risk.**

### For Legal Assistants & Paralegals

All professional users should have a professional user account that uses their individual e-mail address (not a shared e-mail address) as the login ID.

#### Benefits:

- ✓ Reduces security risks
- ✓ Allows the professional users to subscribe to filings and receive notifications separately from their attorneys
- ✓ Allows the professional to view what they've submitted using the 'Submission List' in the user's dashboard
- ✓ Provides important audit tracking details regarding who specifically submitted filings

#### Account Setup:

1. If the user doesn't already have an individual 'Professional Account', they can easily create one by clicking the [Register](#) link in the top, right corner of EFIS.
2. Next, [Login](#) using the professional account user credentials.
3. Request to be [linked](#) to associated entities as a 'legal' or 'other' contact type.
4. The request will be routed to the official representative for the linked company/entity to review and approve/deny.
5. If the request is approved by the Official Representative, the professional user will then be able to do the following while logged in using their individual professional account:
  - Submit filings on behalf of the linked companies/entities
  - Respond to Data Requests
  - View company filings

**Tip:** the professional user account for legal assistant or paralegals can be modified to add their attorney's e-mail address as an alternate e-mail address to their account.