



Guide for Firm Administrators

For instructing parties · Version 1.0 · 28 October 2026 · MSS Records Portal 1.13

The screens shown are from an invented example firm (Example Law LLP) and invented cases. No real patient information appears.

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1 Your role as administrator

As your firm's administrator you control who in your firm can see the medical records MSS releases on the portal. You can:

- see **every case of your firm** that has something released on the portal, and open its records
- **assign** a case to a colleague, so they can open it too
- **withdraw** that access again at any time
- see **who holds what**, and a log of every assignment and withdrawal

Your colleagues see only the cases MSS released to them, plus the cases you assign to them. A case with nothing released yet never appears, even to you.

2 Becoming an administrator

MSS names each firm's administrator(s). To be named, send MSS:

- your work e-mail address (at your firm's own domain)
- your **own date of birth**: you will sign in with it

A firm can have more than one administrator. Only MSS can add or remove an administrator. If an administrator leaves or changes role, tell MSS straight away.

3 Signing in

1. Go to <https://portal.mssrecords.co.uk>.
2. Enter your e-mail address.
3. Leave **our case reference** blank.
4. Enter **your own date of birth** as six digits, day-month-year (15 May 1975 = **150575**), not a client's.
5. Press **SEND CODE**, then type in the 6-digit code e-mailed to you. It is valid for 30 minutes.

SIGN IN

Enter the email address the records were released to, our case reference and the client's date of birth. We will then send you a one-time code.

EMAIL ADDRESS

OUR CASE REFERENCE (from the e-mail; a firm administrator may leave it blank)

DATE OF BIRTH (six digits, ddmmyy -- the client's; a firm administrator enters their own)

SEND CODE

An administrator signs in with their own date of birth and leaves the case reference blank

After 5 wrong dates of birth within 30 minutes your address is locked for 30 minutes. Every sign-in by an administrator is recorded in your firm's log.

4 Your firm's cases

You land on **YOUR CASES**: one line per case of your firm, with our reference, the client, your reference, the number of records, the date of the last release and which colleagues also hold it. Press **OPEN** to go into a case.

YOUR CASES · EXAMPLE LAW LLP					
CASE	CLIENT	RECORDS	LAST RELEASE	ALSO HELD BY	
900001 your firm's case	Mr John Sample your ref JS/12345	3	27/10/2026 18:08	Jane Smith	OPEN
900002 your firm's case	Mrs Mary Example your ref TB/4410	1	28/10/2026 09:25	Tom Brown	OPEN
900003 your firm's case	Mr David Specimen your ref TB/4502	1	28/10/2026 09:25	Tom Brown	OPEN

YOUR CASES: every case of the firm on the portal

Under each case reference it says how you hold it: *released to you*, or *your firm's case* (you see it as administrator). Inside a case everything works as described in the *Guide for Solicitors and Instructing Parties*: opening, downloading, scans, ASK and sending files to MSS.

5 Giving a colleague access

Below your cases is your firm's **ADMINISTRATOR** panel.

EXAMPLE LAW LLP · ADMINISTRATOR
You see every case of your firm on the portal (3). Your employees see only the cases MSS released to them and the cases you assign here. An assignment can be given only to an address at examplelaw.co.uk; ask MSS to add any other address. Every assignment and withdrawal is recorded below and in MSS's audit of the case.
Administrators: sarah.jones@examplelaw.co.uk (Sarah Jones)

CASE EMPLOYEE'S E-MAIL **ASSIGN**

The administrator panel: choose the case, enter the colleague's e-mail, press **ASSIGN**

1. Choose the case in **CASE**.
2. Enter your colleague's e-mail address in **EMPLOYEE'S E-MAIL**.
3. Press **ASSIGN**.

jane.smith@examplelaw.co.uk now holds 900002

The portal confirms the assignment

Your colleague is e-mailed straight away to say they have been given the case. They sign in with the **client's** date of birth and a code, like any recipient.

Which addresses can be given a case. Only an address at your firm's own e-mail domain, or one MSS has approved for your firm. Shared and public addresses (Gmail, Outlook, nhs.net and similar) are never accepted automatically. If an address is refused, ask MSS to approve it.

jane.smith@gmail.com is not at examplelaw.co.uk -- ask MSS to approve that address first

An address outside the firm's domain is refused until MSS approves it

6 Who holds what

WHO HOLDS WHAT lists each colleague who can see a case of your firm:

Column	What it shows
Employee	The colleague's e-mail address and name
Released by MSS	Cases MSS released to that person directly
Assigned here	Cases given to them by an administrator (or by MSS on your firm's behalf), each with a WITHDRAW button

WHO HOLDS WHAT		
EMPLOYEE	RELEASED BY MSS	ASSIGNED HERE
jane.smith@examplelaw.co.uk Jane Smith	900001	900002 WITHDRAW
tom.brown@examplelaw.co.uk Tom Brown	900002, 900003	—

WHO HOLDS WHAT: Jane Smith holds 900001 by release and 900002 by assignment

7 Withdrawing access

Press **WITHDRAW** beside the case in **Assigned here**. Access ends immediately, including for a colleague who is signed in at that moment.

You can withdraw only what was *assigned*. A case MSS *released* directly to a colleague can be withdrawn only by MSS: contact us and we will do it at once.

8 The authorisation log

The **AUTHORISATION LOG** at the foot of the panel records, with the date and time, who did what:

- administrator named or removed (by MSS)
- administrator signed in
- case assigned and case withdrawn, and by whom
- addresses approved by MSS

AUTHORISATION LOG				
WHEN	WHAT	CASE	WHO	BY
28/10/2026 09:26	case assigned	900002	jane.smith@examplelaw.co.uk	sarah.jones@examplelaw.co.uk (firm administrator)
28/10/2026 09:26	administrator signed in		sarah.jones@examplelaw.co.uk	
28/10/2026 09:25	administrator named		sarah.jones@examplelaw.co.uk	MSS

The authorisation log

Every assignment and withdrawal is also written to MSS's own audit of the case, alongside every view and download.

9 Good practice

- Assign a case only to colleagues who work on that matter.
- Review **WHO HOLDS WHAT** regularly, and withdraw access when a colleague moves off a matter.
- When someone leaves your firm, withdraw their assignments and tell MSS, so we can end anything released to them directly.
- Never share your sign-in, and never forward a release e-mail: assign the case instead.
- If something has been released that should not have been, do not open it further and contact MSS straight away.

10 Medical experts

The administrator role is for instructing parties. Releases to medical experts are personal to the expert: they are not shown to a firm administrator and cannot be assigned. If an expert's secretary or colleague needs access to a case, the expert should ask MSS, and we will release it to them directly.

11 Help

Problem	What to do
"Date of birth not recognised"	Enter your own date of birth as six digits (150575), and leave the case reference blank
No code arrives	Check your junk folder for an e-mail from codes@mssrecords.co.uk, then ask for a new code
Locked out	Wait 30 minutes, or contact MSS
A case is missing from YOUR CASES	Nothing has been released on it yet, or MSS released it to an expert only. Contact MSS if you expected it
"... is not at yourfirm.co.uk -- ask MSS to approve that address first"	Ask MSS to approve the address for your firm
No WITHDRAW button for a case	It was released by MSS directly: ask MSS to withdraw it
A new administrator is needed	Send MSS their work e-mail and their own date of birth

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 Please quote our case reference when you contact us about a case.