Oregon State Bar

Company Administrator Program Manual

This manual will demonstrate each task a Company Administrator (Admin) may perform on behalf of their company. If you have any questions, contact the Oregon State Bar by email.

Throughout these instructions, we will refer to "individuals" associated to the company, which includes both OSB Members and non-members (support staff, human resources, bookkeepers, etc.). The information contained herein applies to all individuals, with specific references made to information that applies only to OSB Members.

1. Logging into Company Administrator Dashboard 3
   - Differentiating between personal Dashboard and Admin Dashboard
   - Opening Admin Dashboard
   - Changes to Admin info
   - Admin Dashboard overview

2. Company Directory tab (list of individuals associated to company) 4
   - Access to different office locations
   - Sorting, searching and viewing
   - Adding individuals to the company
   - Disassociating individuals from the company

3. Company Information tab (edit company contact information) 5
   - Global address changes
   - Address change confirmation

4. Pay Invoices tab (review and make payment on outstanding invoices) 6-7
   - Reviewing invoices; Order Confirmation screen
   - OSB Member licensing fee order is not displayed
   - Choosing invoice(s) to pay
   - Payment methods and credit card address
   - Bank transfer or credit card amount limits
   - Payment issues
   - Payment summary and receipt

5. Order History tab (displays paid company orders) 8
   - What to do if you don't see an Order
   - Order Confirmation

6. Section Memberships tab 9-10
   - Avoiding duplicate Section memberships purchases
   - Complementary Section memberships

7. Interest on Lawyer Trust Account (IOLTA) Reporting tab 11
- Compliance reporting period
- Submitting multiple reports
- Submission confirmation; printing a receipt

8. Professional Liability Fund (PLF) Assessment tab 12
- Adding Members and Making Payment

9. Pro Bono Reporting tab 13
- Completing and submitting Pro Bono Report

10. Product Catalog ribbon 14-15
- Categories
  - Legal publications
  - Certificates (Disciplinary History, Good Standing, Status History, Comity, Supreme Court)
  - Diversity & Inclusion
  - Public Information
- Shipping physical products to other addresses or individuals

11. CLE Registrations tab 15-16
- Admins can use the Product Catalog to register associated individuals for in-person and virtual CLE seminars, and to make payment
- To place an order for downloadable products

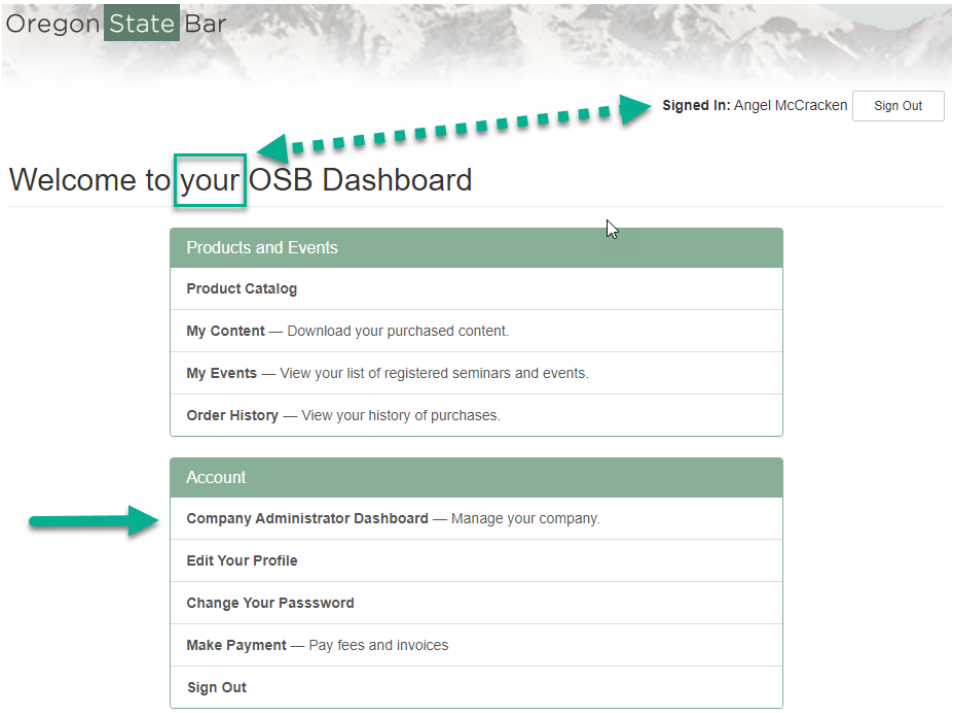
12. MCLE Dashboard tab – Reporting CLE Credits on Members' MCLE Transcripts 16-20
- Company Admin – Select Member and Manage tab
  - Program Search tab
  - MCLE Transcript tab
  - Add Activity to Transcript tab
  - Stop Managing Member

13. MCLE Dashboard tab – Sponsor Accreditation Applications and Attendance Reporting 20-23
- Program Accreditation
- My Applications / Programs tab
- Submit New Application tab
- Pay Fees tab
- Reporting Attendance (Sponsors Only) tab
- Reporting attendance for your Company's Sponsored Seminar
  - Option 1: Report attendance yourself *at no cost*
  - Option 2: Pay OSB to report attendance

1. Logging into Company Administrator Dashboard

Differentiating between your *personal* Dashboard and your *Admin* Dashboard

When you first log in, you will be on your *personal* Dashboard, with options related to your OSB Member or non-member profile.



Opening Admin Dashboard

To work on Admin tasks for individuals associated to your company, click on the link: Company Admin Dashboard – Manage your company.

Changes to Admin information

Any changes made to your personal information on the 'Edit Your Profile' link will remove your Admin access. To add or replace an Admin, or to change your name or contact information, send an email.

Admin Dashboard overview

When you are logged in to the Admin Dashboard, you will see current Admin information and tabs:

2. Company Directory tab

On this tab, you may review the individuals currently associated to your current company location.

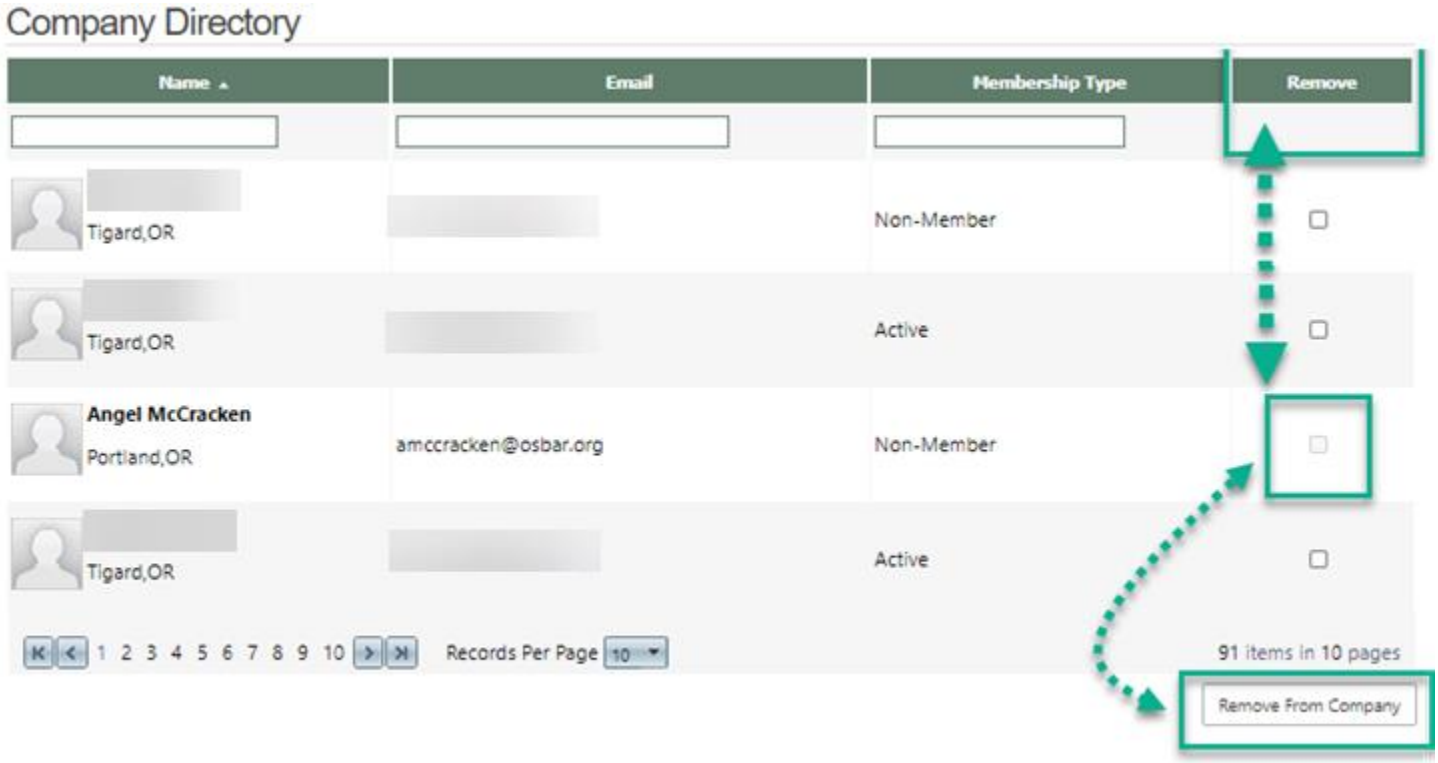
Access to different office locations To work on tasks for individuals located in other office locations, send an email with the address you would like to work on next.

Sorting, searching and viewing You may sort the list by clicking on any green ribbon field, or search the fields by typing information into any empty box beneath the green ribbon. You may view up to 50 records per page by toggling the Records Per Page button at the bottom of the page.

Adding individuals to the company You may ask the individual to log in and associate themselves to the company, or you may send an email with the individual's name and any specific information (i.e., telephone number and email address).

Disassociating individuals from the company If an individual is no longer employed by the company, you may disassociate them by clicking on the 'Remove' box to the right of their name, and then 'Remove From Company' at the bottom of the page. The company name and website will be removed from their record; however, all other information will remain intact until they log in to update their contact information.

OSB staff will attempt to contact OSB Members at any secondary email address and/or physical address(es) on their record. Pursuant to OSB Rules of Procedure 1.11(a)-(d), it is the responsibility of each OSB Member to promptly notify the bar in writing of any change to their contact information.

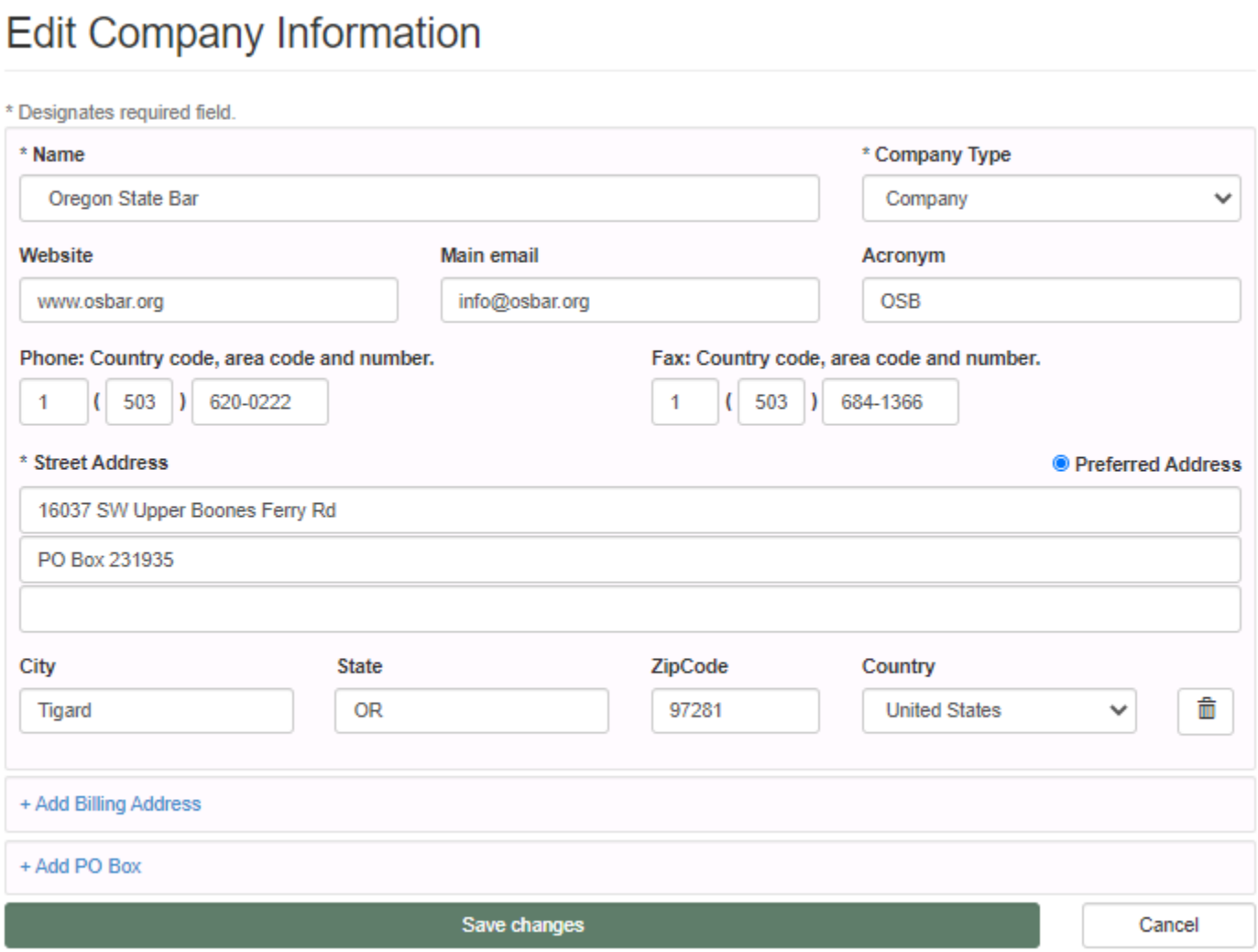


3. <u>Company Information tab</u>

On this tab, you may edit the company contact information.

<u>Global address changes</u> Changes made to the company information will trickle down to all individuals associated to the company who have the same contact information as the company. Accordingly, the updated information will not be applied to the records of individuals who have written over the company information with a different address (i.e., an individual is associated to the company, but use a different home or a satellite office address on their Member Record).

<u>Address change confirmation</u> Each Admin and OSB Member associated to the company will receive an automated email showing the updated company contact information. Address changes are processed overnight and the updated information will appear on the <u>OSB Membership Directory</u>, and will be provided to the PLF and court systems, the following day.

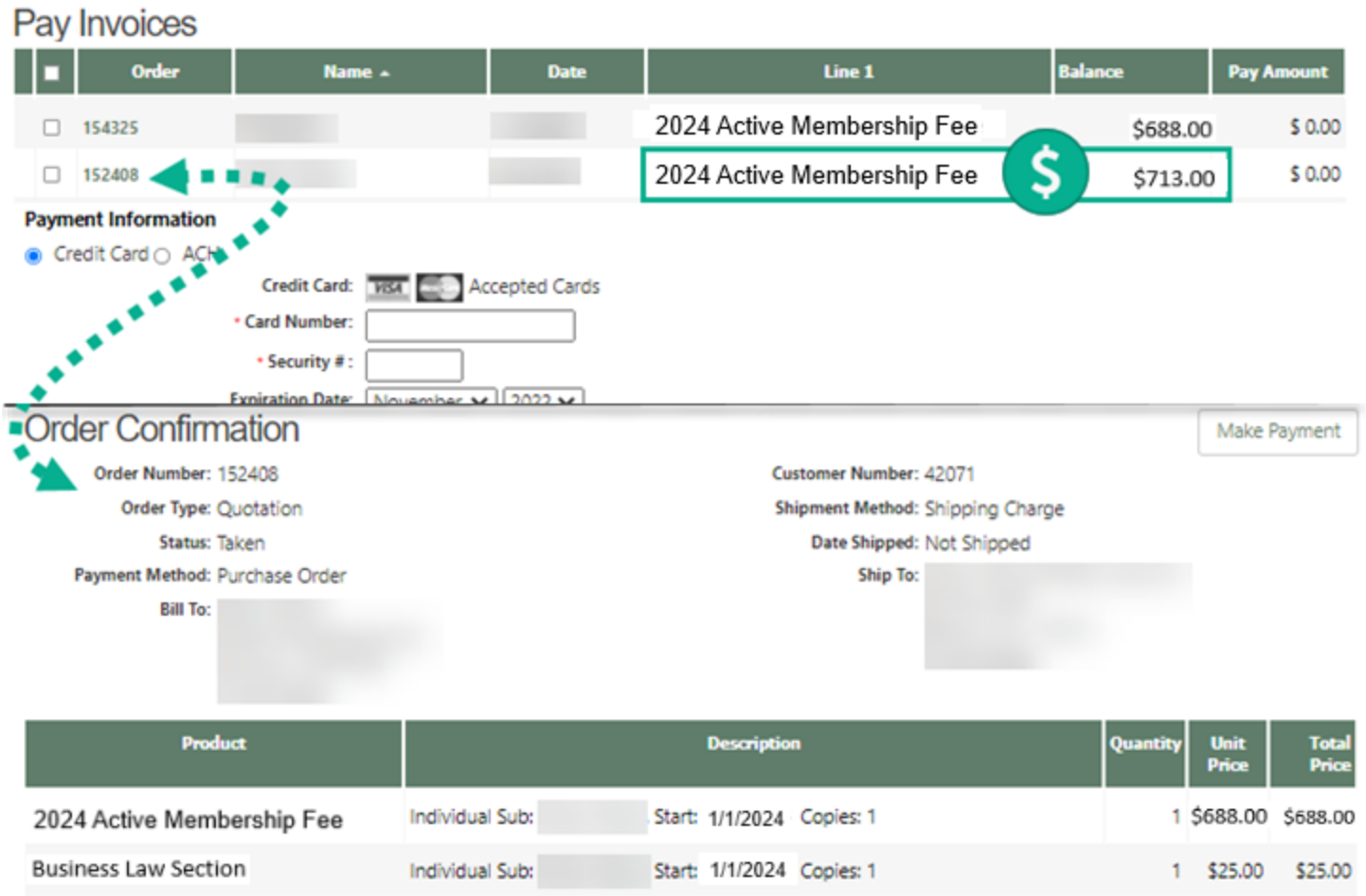


4. <u>Pay Invoices tab</u>

On this tab, you may review and make payment on outstanding invoices, including OSB Member licensing fees, Section memberships, legal publications, certificates, CLE Seminars and other products.

<u>Reviewing invoices; Order Confirmation screen</u> Only the first product contained in each outstanding invoice is displayed. You may click on the green order number to open an Order Confirmation screen, which displays all products contained in the order and the Bill-To/Ship-To information.

<u>TIP</u>: The 2024 Licensing Fee for Active members is **$688**. If you see an amount greater than $688, as shown in Order 152408 below ($713), it may include other items, such as Section memberships.



<u>OSB Member licensing fee order is not displayed</u> If an OSB Member joins the company *after* the licensing fees are assessed, that invoice will not automatically appear in the company's Pay Invoices tab. If you do not see an invoice for an OSB member associated to the company in the 'Company Directory,' send an email.

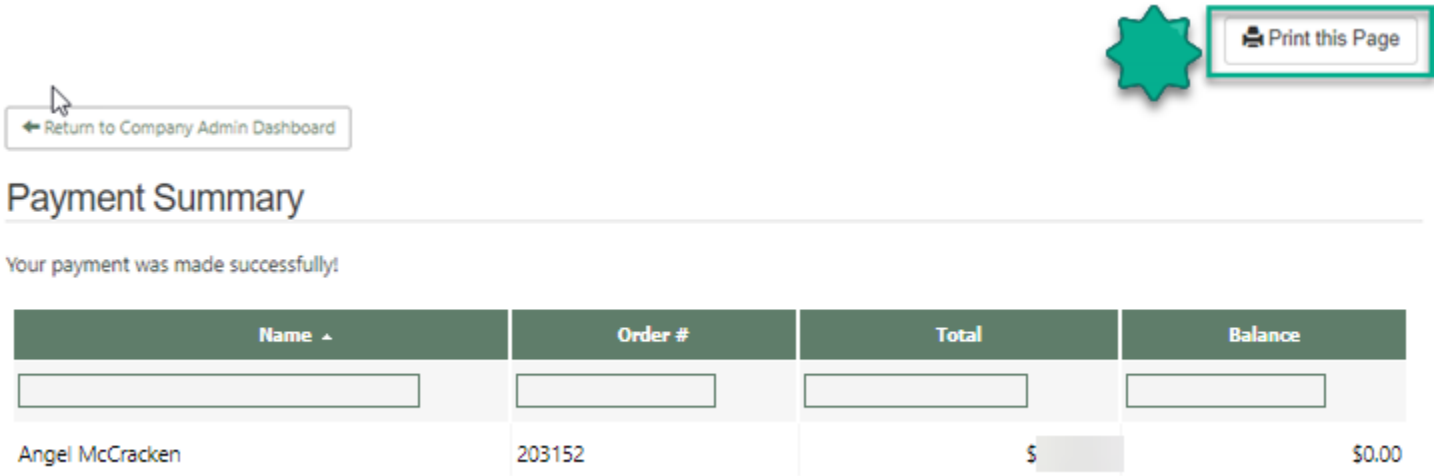
Choosing invoice(s) to pay You may choose which invoice(s) you would like to pay by clicking on each individual Order number checkbox or click the green ribbon checkbox to select all invoices.

Payment methods and credit card address The OSB prefers Automated Clearing House (ACH), a secure encrypted electronic funds-transfer system that transfers funds directly from the company's checking account. You may also use Visa or MasterCard. Click 'Make Payment' after entering all required payment information. If the credit card address does not match the address on the company record, use the Billing Address field to enter the address information associated with the credit card.

Bank transfer or credit card amount limits If making one single large payment exceeds the monetary limits imposed by the bank for ACH transfers, or by the credit card issuer, you may select and pay invoices whose totals are below those limits on different days throughout the compliance period.

Payment issues If the payment is unsuccessful, first confirm ACH checking account and routing numbers, or the credit card number, expiration date and CVV security number, then try again. If the issue persists, contact your bank or your credit card company to determine any concerns within their system. Lastly, send an email to the OSB Accounting Department with the Order number(s) and specific error details.

Payment summary and receipt If the payment is successfully processed, you will be shown a 'Payment Summary' page with each Order number that was paid, and you can print this page as a receipt. As you can see, this page only shows the individual's name, Order number, Order total and balance due. If you prefer a more detailed receipt, you may print a copy of the 'Order Confirmation' screen from the Order History tab, as described below.



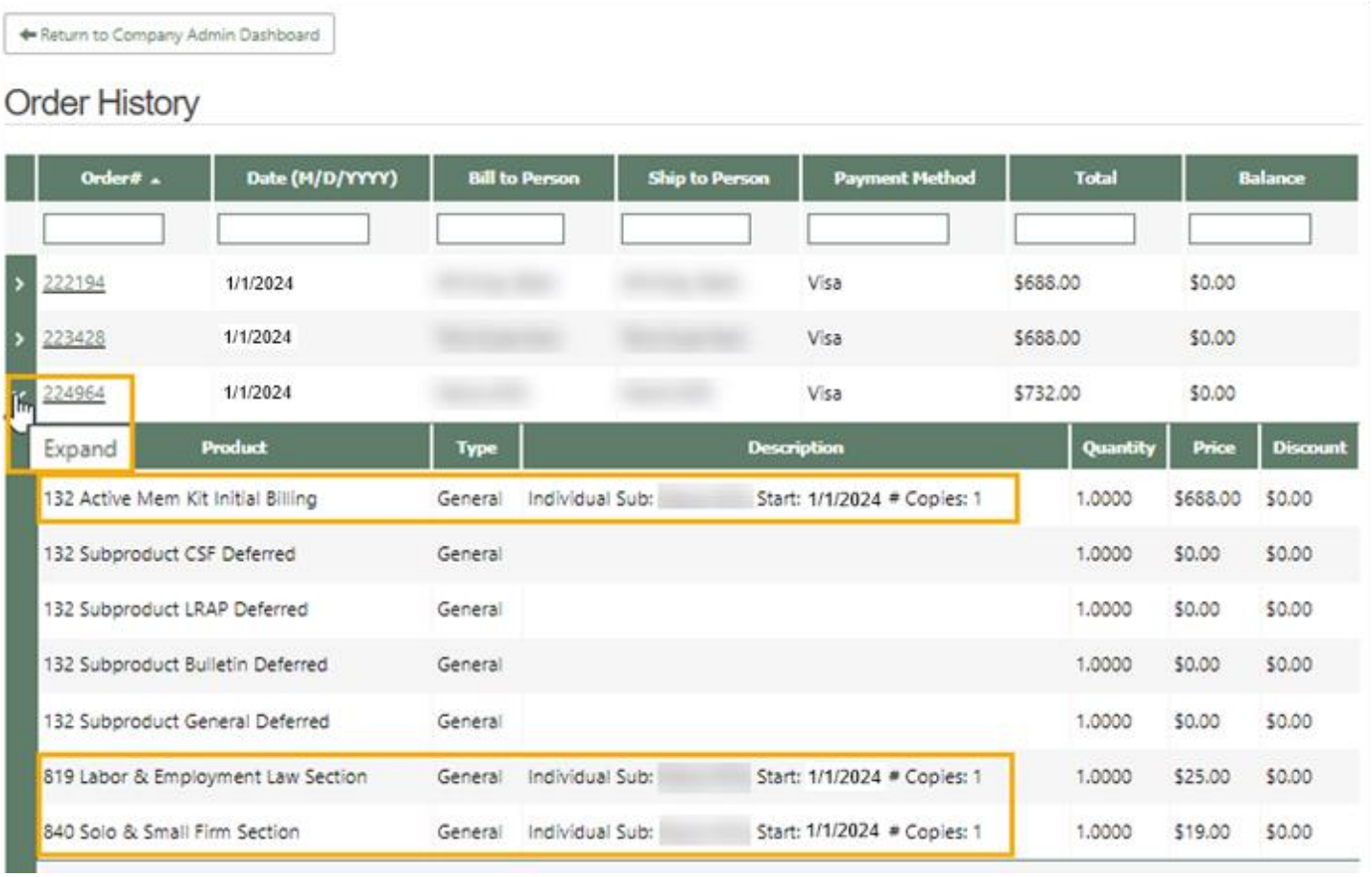
5. Order History tab

On this tab, you may review previously processed orders, including OSB Member licensing fees, Section memberships, legal publications, certificates, CLE Seminars and other products.

What to do if you don't see an Order Individuals associated to the company are able to purchase items as 'personal orders' that are billed and shipped directly to them. If you believe there are orders that were paid by the company, or need to be associated to the company, but are not included in the Order History tab, send an email.

Order Confirmation Clicking on the green Order number will open the Order Confirmation, which displays all products contained in the order and the Bill To/Ship To information. You may print this screen as a receipt.

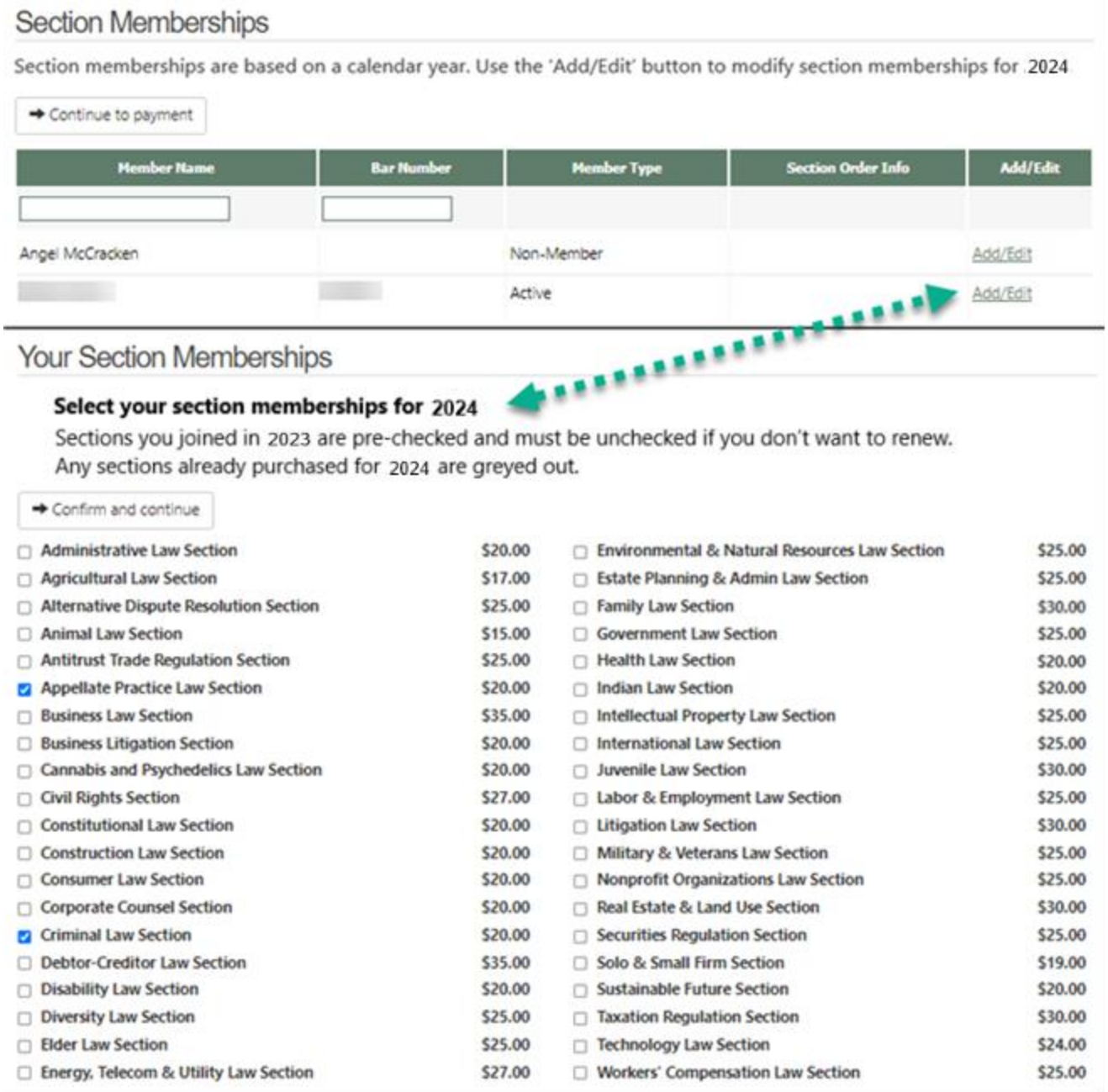
TIP: To simply see the items within an Order in this screen, you may also click on the white arrow > to the left of each order number; the drop down window will display each product in the Order.



6. Section Memberships tab

On this tab, you may review and purchase Section memberships for associated individuals. Section memberships are not automatically assessed with OSB member licensing fees. If an individual wants to join or renew annual Section membership(s), click on the 'Add/Edit' button to the right of their name to open the Section Memberships screen.

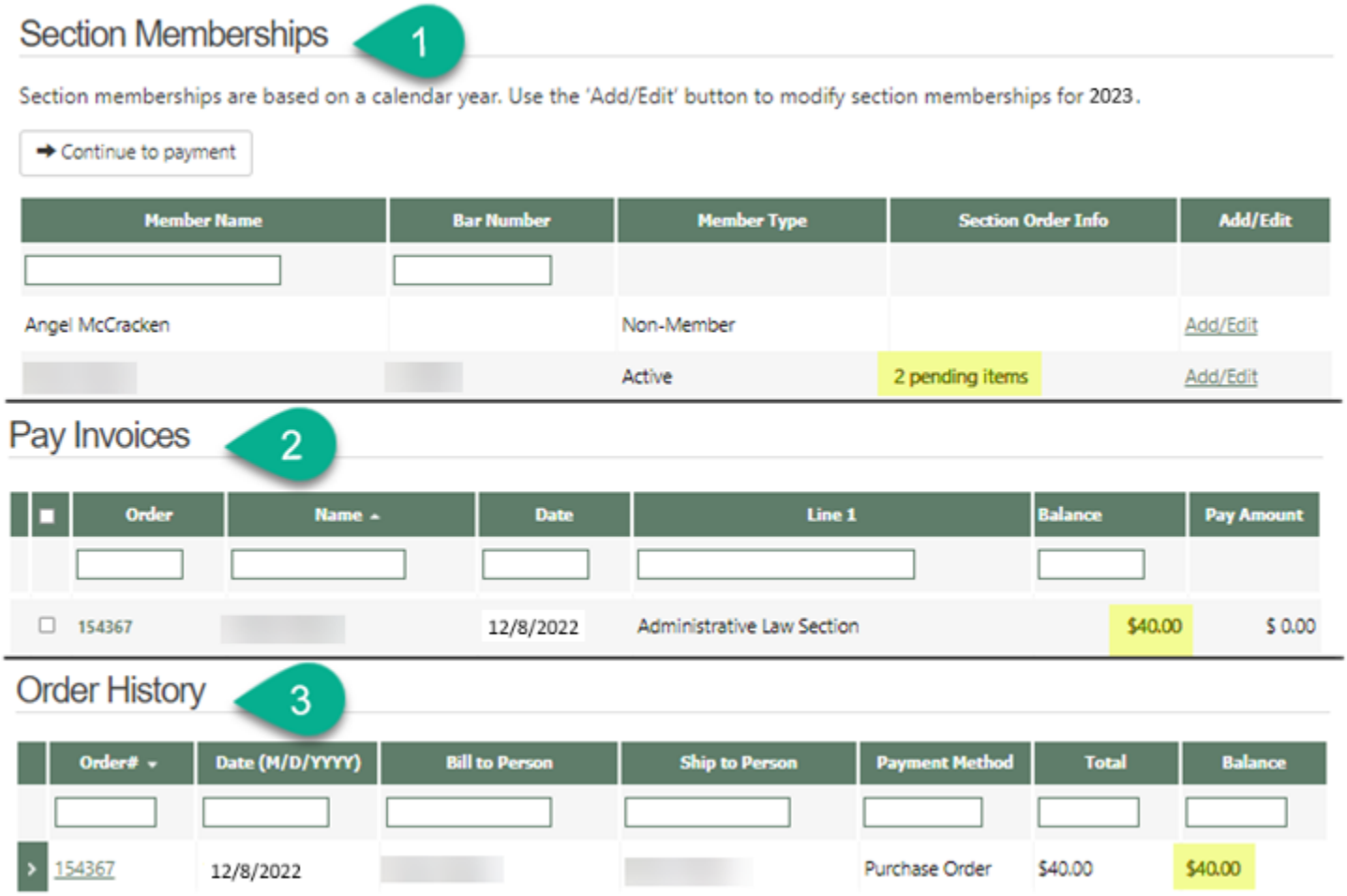
Section memberships already purchased for the current year will be greyed out. Sections joined last year that have not yet been renewed this year, will be pre-checked for your convenience.



Avoiding duplicate Section membership purchases As shown below, if Section memberships were selected but not yet purchased, they will appear in three areas shown below:

(1) on the Section Memberships page as '<#> pending items'
(2) on the Pay Invoices tab
(3) on the Order History tab, as a Purchase Order with a balance due.

Unpaid Section membership invoices will be deleted if not paid within a reasonable time period.



Complementary Section memberships Some Sections offer complimentary membership to New Members admitted on or after Oct. 1 of the previous year (form), and 50+ Year Members (form).

You may purchase all Sections for the above-referenced members through the Admin dashboard; however, complimentary sections must be processed with another item requiring payment, such as a licensing fee order, as the cart will not process a $0 payment. Requests for *only* complimentary sections may be sent by email using the linked forms.

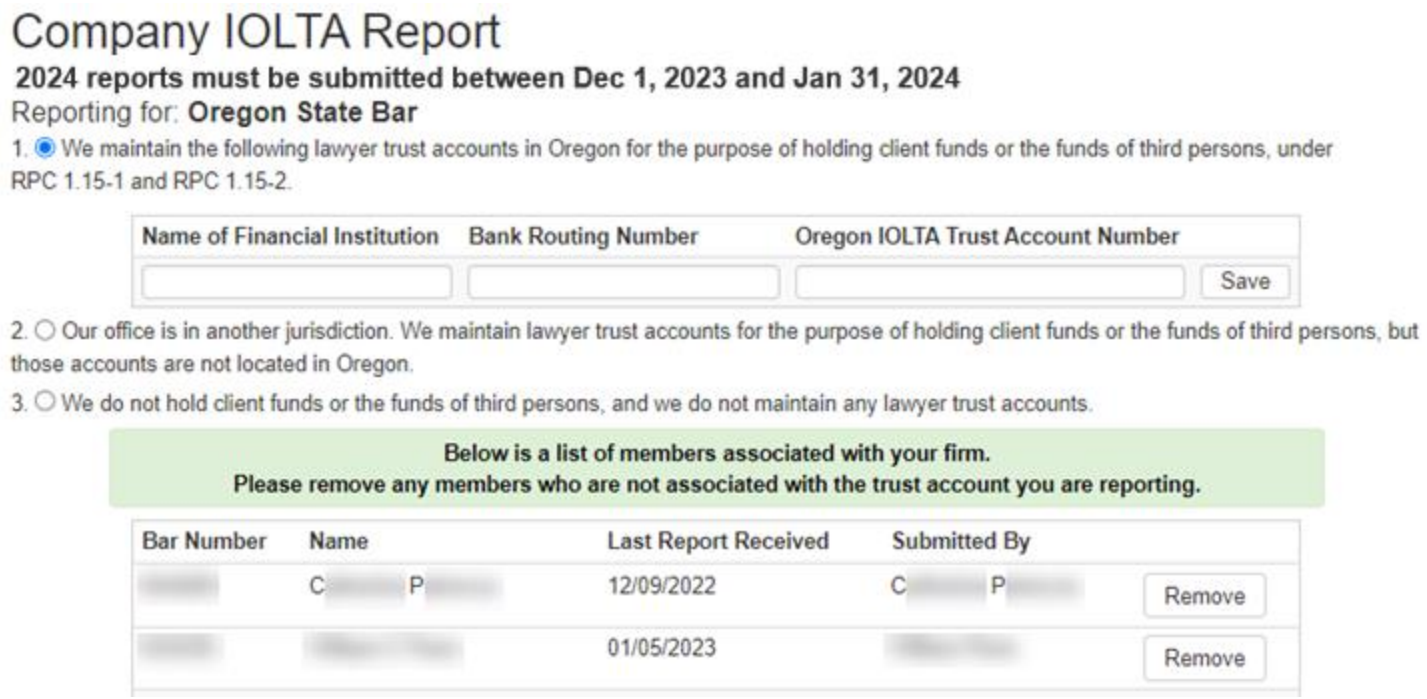
Some Sections also offer complementary membership to Judges (form) and Judge's staff (form). To order complimentary sections for these members, complete and return the form(s) by email.

7. Interest On Lawyers Trust Account (IOLTA) Reporting tab

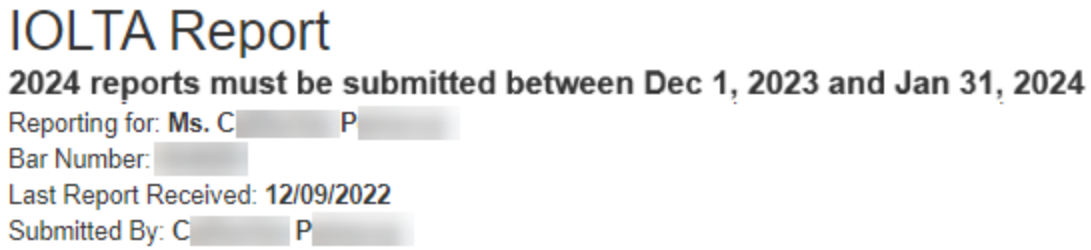
All Active OSB Members ***must submit an annual IOLTA report*** (including those who do not hold client funds, or those who reside out-of-state) ***during the compliance reporting period (Dec 1 – Jan 31).*** Reports can also be submitted mid-year to update bank account information, or when new members join the company. If you do not see an associated OSB Member on this page, they may not be in Active status. You can find Membership Type on the Company Directory or Membership Directory.

Submitting multiple reports There are three available options for IOLTA reporting, as shown below. While it is likely you will choose one reporting option for all OSB Members in your company, you may 'Remove' any OSB Member(s) from each reporting scenario if it does not apply to them, submit the report, then go back and submit a different report for the other OSB Members.

Submission confirmation You will see the date the last report was received, and the person who submitted the report. When the report is submitted, you will receive an on-screen confirmation.



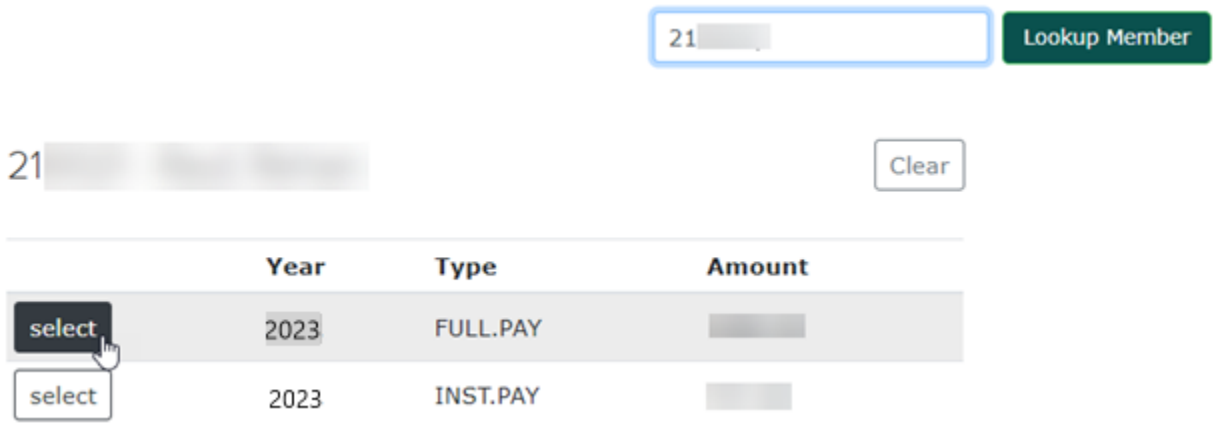
Members can also see the date the last report was received and who submitted the report on their Dashboard IOLTA Reporting page.



Questions regarding IOLTA may be directed to the IOLTA Department by email.

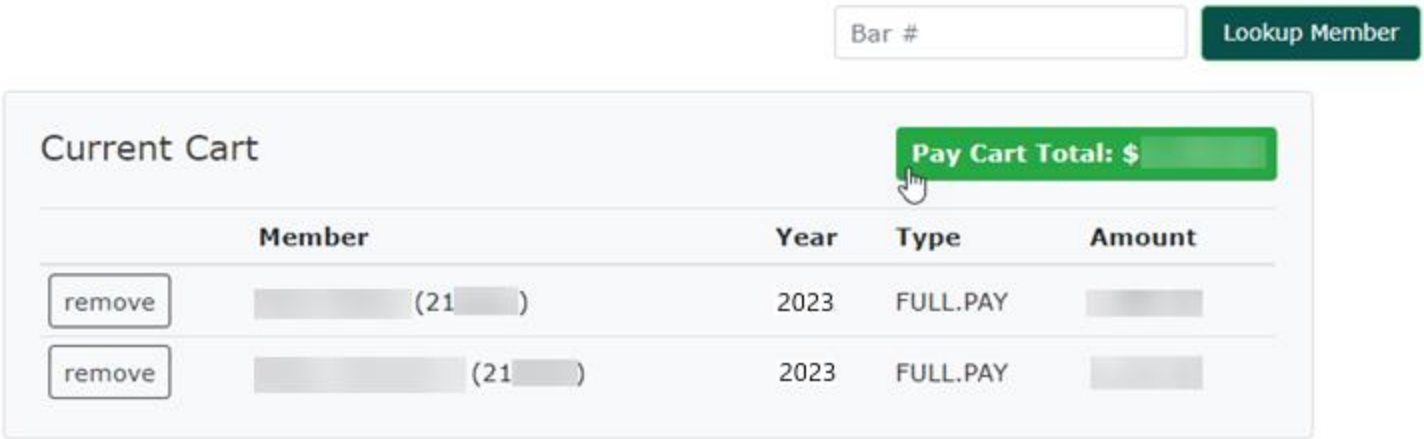
8. Professional Liability Fund (PLF) Assessment tab

This tab will redirect to the PLF Quick Pay page, where you may look up an OSB Member by Bar number to view the PLF Assessment payment options and submit payment.



Adding Members and Making Payment You may search for and include additional members, then use the 'Pay Cart Total' button to submit payment by ACH. Be sure to verify your bank's routing transit number and bank account number. If either number is incorrect, the payment will be returned by the bank.

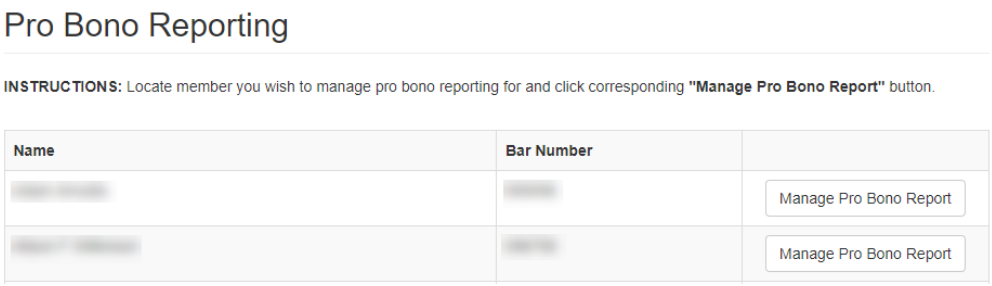
The PLF will acknowledge payment by email directly to each OSB Member whose Assessment is successfully processed.



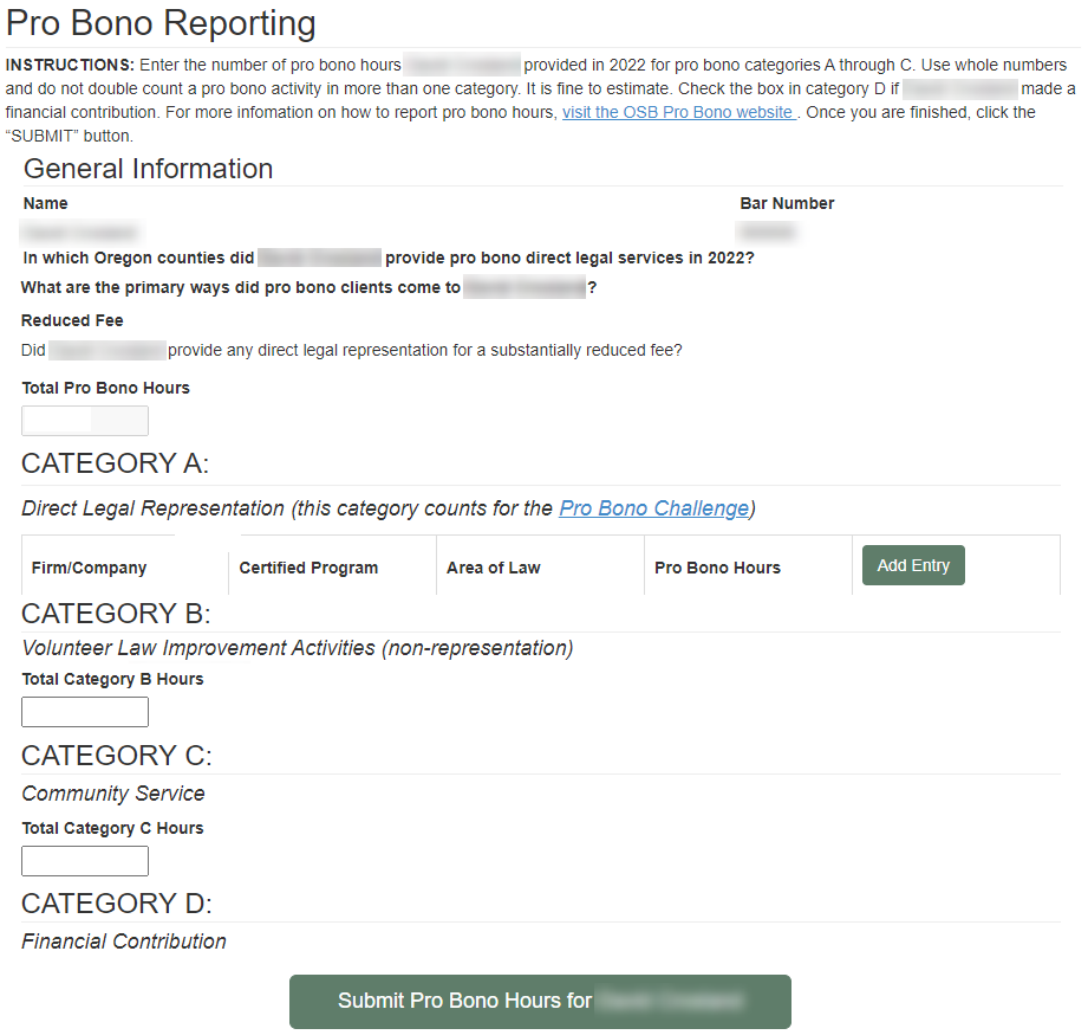
Questions regarding Assessments may be directed to the Professional Liability Fund at (503) 639-6911.

9. Pro Bono Reporting tab

On this tab, you may submit Pro Bono Reporting on behalf of your associated OSB Members. To open a specific OSB Member's Pro Bono report, click on the 'Manage Pro Bono Report' button to the left of the OSB Member's name. Refer to the Pro Bono Reporting Home FAQ page for more information.



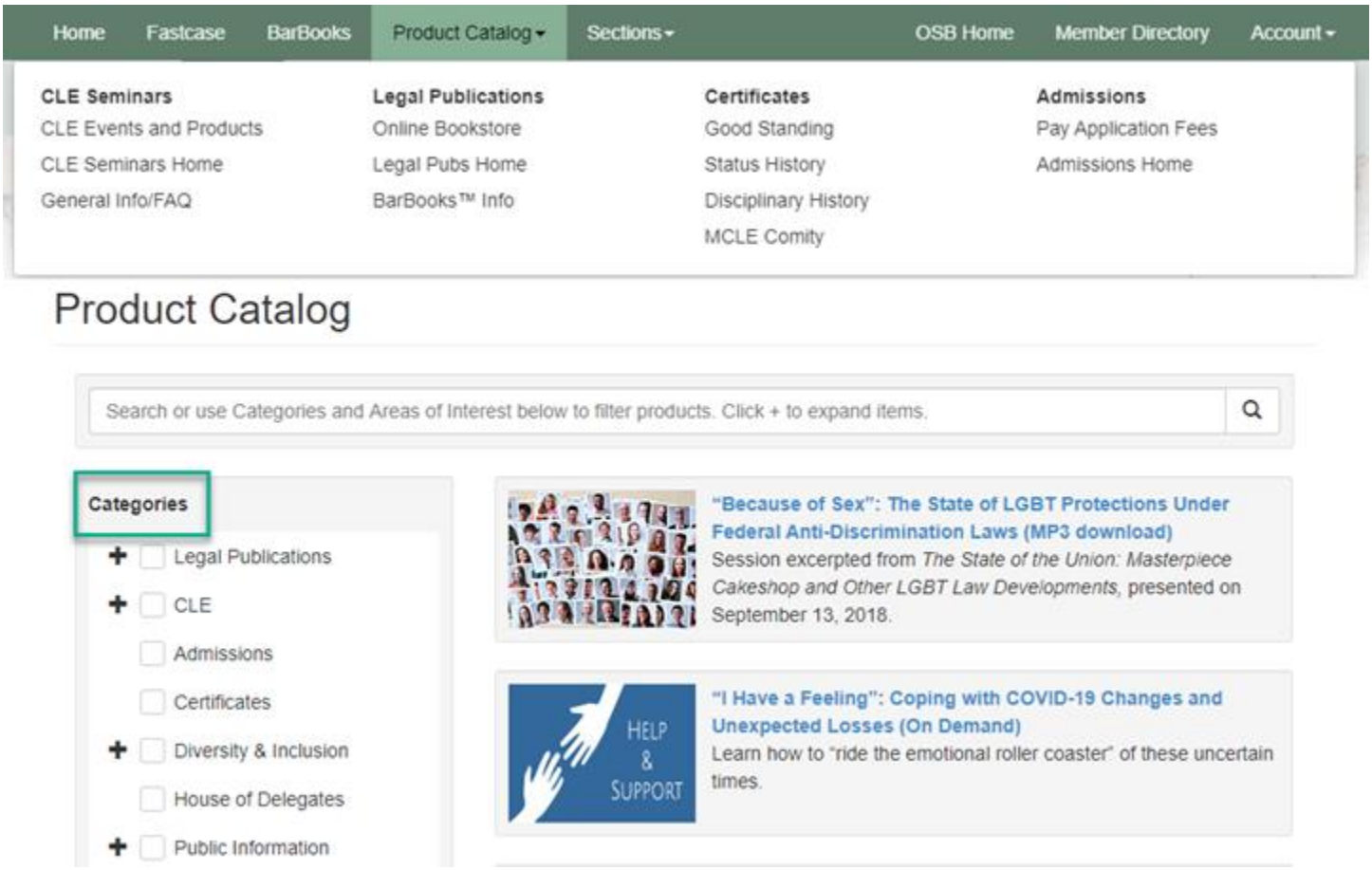
On the Reporting page, complete General Information regarding the specific OSB Member. The Total Pro Bono Hours box will update as you complete the subsequent Categories (A-D). When the report is completed, click on the green 'Submit Pro Bono Hours for' button.



Questions regarding Pro Bono may directed to the Pro Bono Reporting Department by email.

10. Product Catalog ribbon

The OSB Product Catalog may be accessed by the green ribbon at the top of the page. You may narrow the product selection by clicking on a specific category within the Product Catalog drop down, or within the Categories or Areas of Interest boxes on the left-hand side of Product Catalog page.



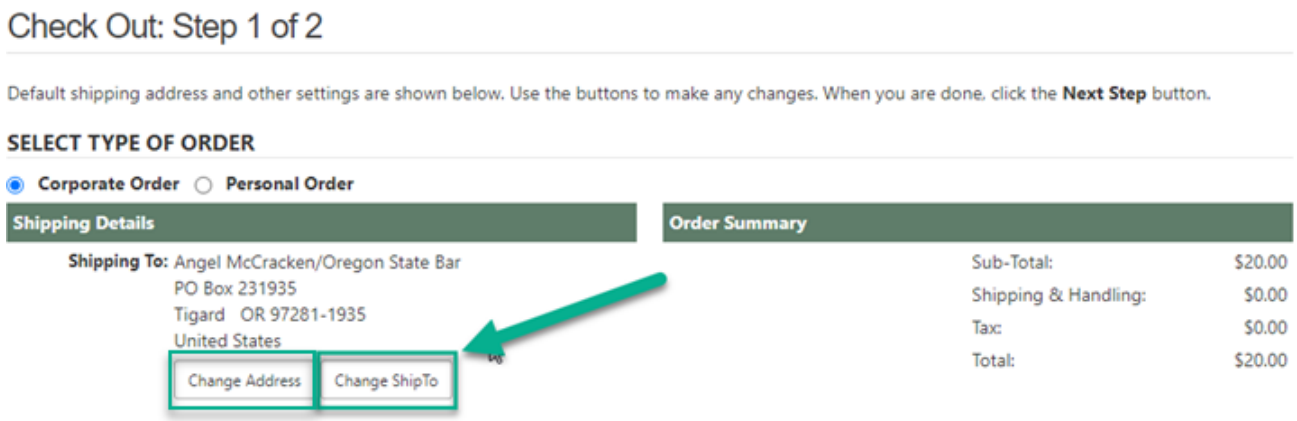
Categories include:

- Legal Publications - Printed books and e-book download products.

- CLE Seminars - *See Section 10 below regarding registering OSB Members for CLE seminars*.

- Certificates - Good Standing, Comity, Supreme Court, Disciplinary and Status History
  You may purchase Certificates on behalf of OSB Members by entering the quantity and the OSB Member's Bar number, then add to the Cart and make payment.

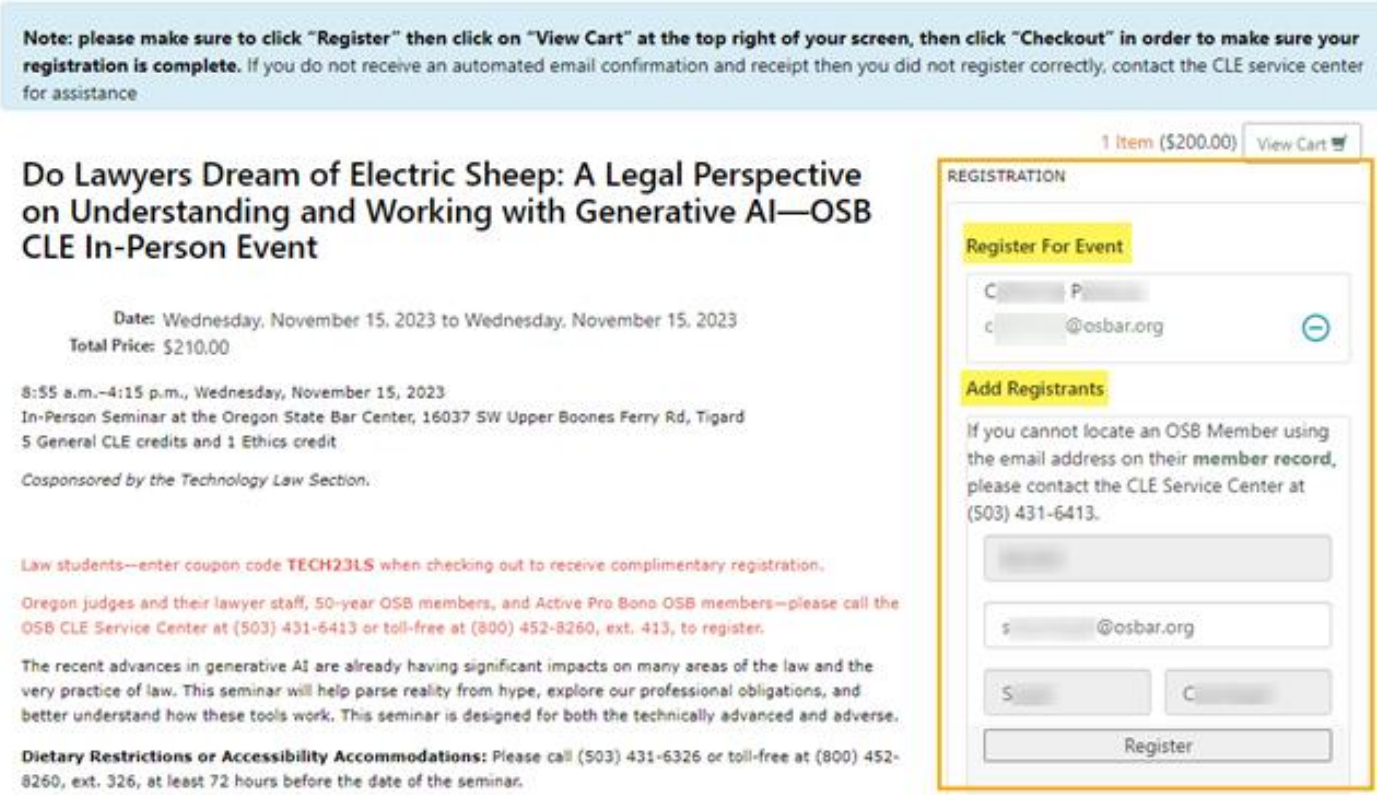
Shipping products to other addresses or individuals You may have physical products shipped to yourself at your existing address, or at another address using the 'Change Address' button. You may also choose to have physical products shipped directly to an individual associated to the company at their address or a different address, using the 'Change Ship To' button.



11. <u>CLE Registration tab</u>

Admins may register associated OSB Members for in-person and virtual CLE seminar events. After finding events on the Product Catalog, Admins may use the 'Add Registrants' box to register OSB Members by entering their Bar number, email address or name, and then clicking Register. The View Cart page will show the names of OSB Members who will be registered for the event(s).

When payment is made, each OSB Member will receive an email confirmation with details regarding the in-person or virtual seminar. OSB Members must be registered using their Bar number to receive CLE credit for the seminar.



View Cart

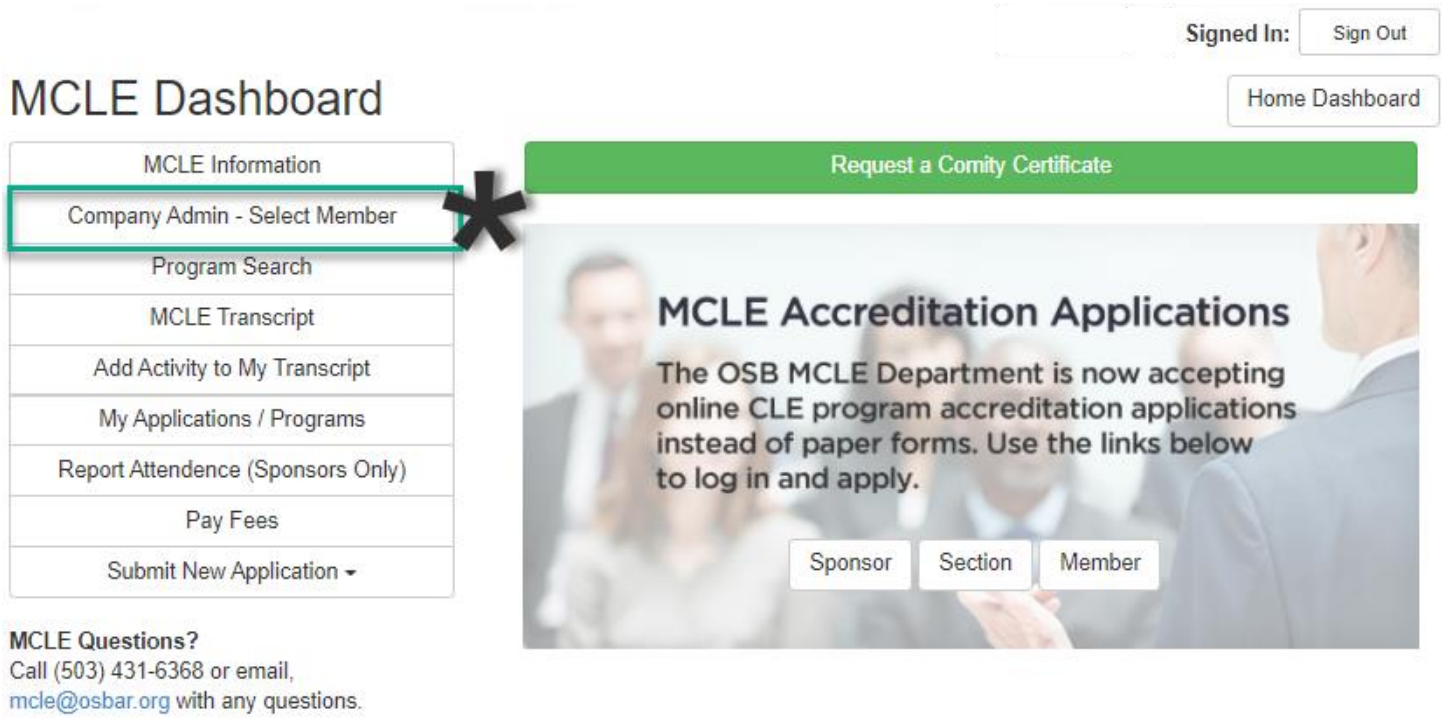
Remove	Product	Item Description	Unit Price	Quantity	Total Price	Details
☐	Do Lawyers Dream of Electric Sheep: A Legal Perspective on Understanding and Working with Generative AI—OSB CLE In-Person Event	Registration for C P	$200.00	1	$200.00	Details...
☐	Do Lawyers Dream of Electric Sheep: A Legal Perspective on Understanding and Working with Generative AI—OSB CLE In-Person Event	Registration for S C	$200.00	1	$200.00	Details...

To place an order for downloadable products View the Product Catalog here before contacting the OSB CLE Service Center either by email with the product information and a list of associated OSB Members with their Bar numbers, or by phone at (503) 431-6413 or toll-free at (800) 452-8260 ext. 413. You will receive an email with the order details, and the order may be found on the 'Pay Invoices' tab to make payment. When payment is made, each OSB Member will receive an order confirmation and details on how to access the downloadable products on their Dashboard in the My Content area.

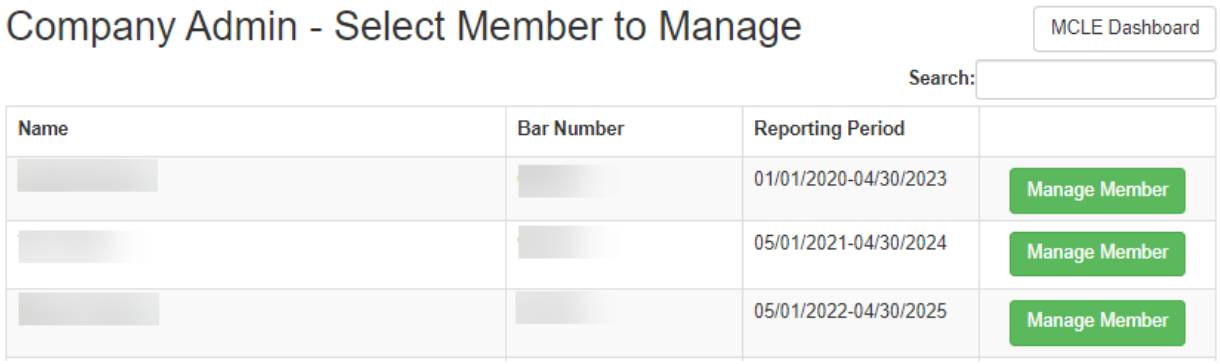
Questions regarding OSB products may be directed to the CLE Service Center at (503) 431-6413.

12. MCLE Dashboard tab – Reporting Credits on Members' MCLE Transcripts

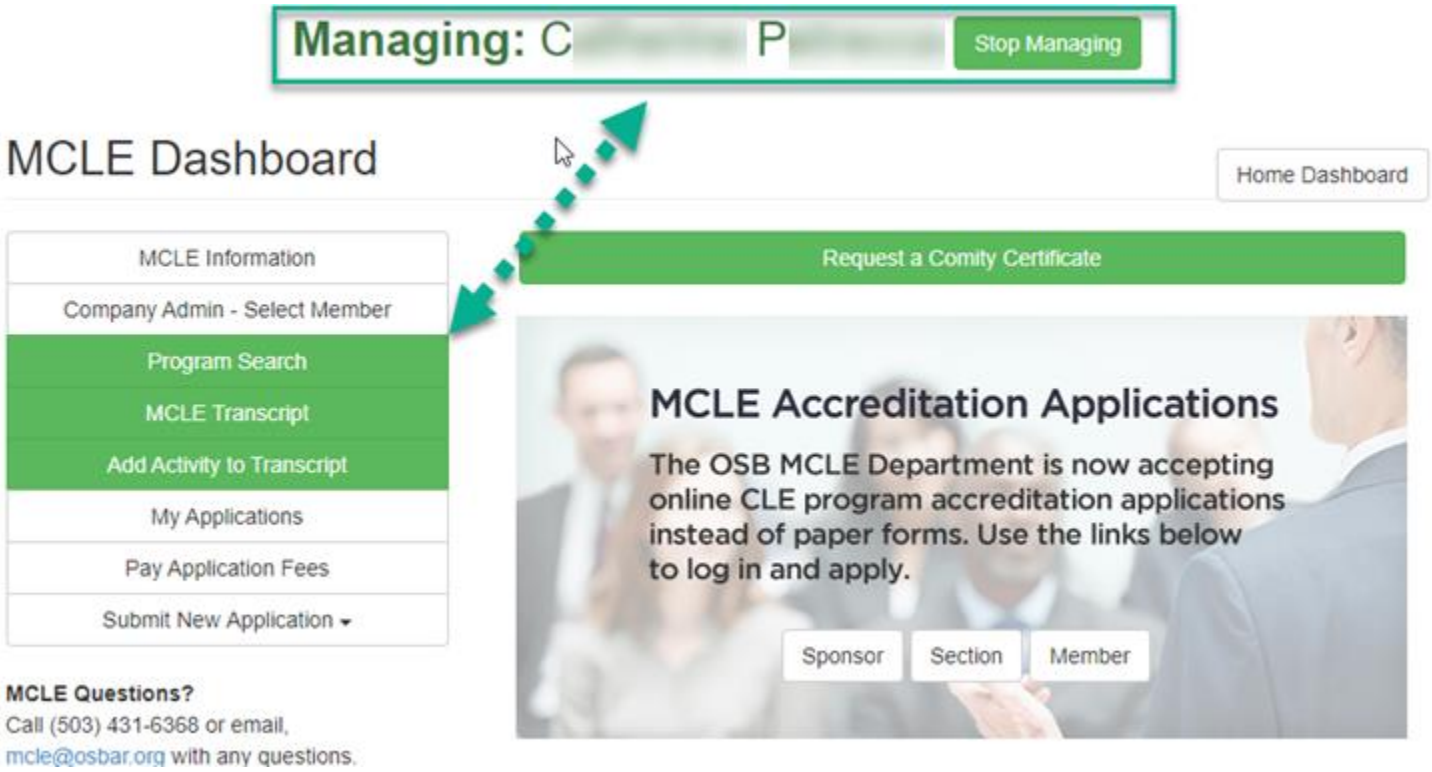
On this tab, you will find information and rules regarding Minimum Continuing Legal Education, you may search for existing MCLE accredited programs, add programs to and edit your OSB Members' MCLE Transcripts, and submit and pay for MCLE accreditation applications. The MCLE rules and responses to frequently asked questions can be found on the MCLE Information tab.



Company Admin – Select Member and Manage tab On this tab, you may manage MCLE credit reporting for OSB Members, one at a time. You may search or sort by any field, including the Reporting Period field, in ascending or descending order. To open a specific OSB Member's MCLE transcript, click on the 'Manage Member' green button to the left of the OSB Member's name.



Once you have selected an OSB Member, you will see 'Managing: <*OSB Member name*>' at the top of the screen, and three tabs will be shown in green to alert you that you are working on an OSB Member's record. You can now edit the transcript by adding or deleting credits. Detailed instructions for these processes are outlined below in the MCLE Transcript section below.



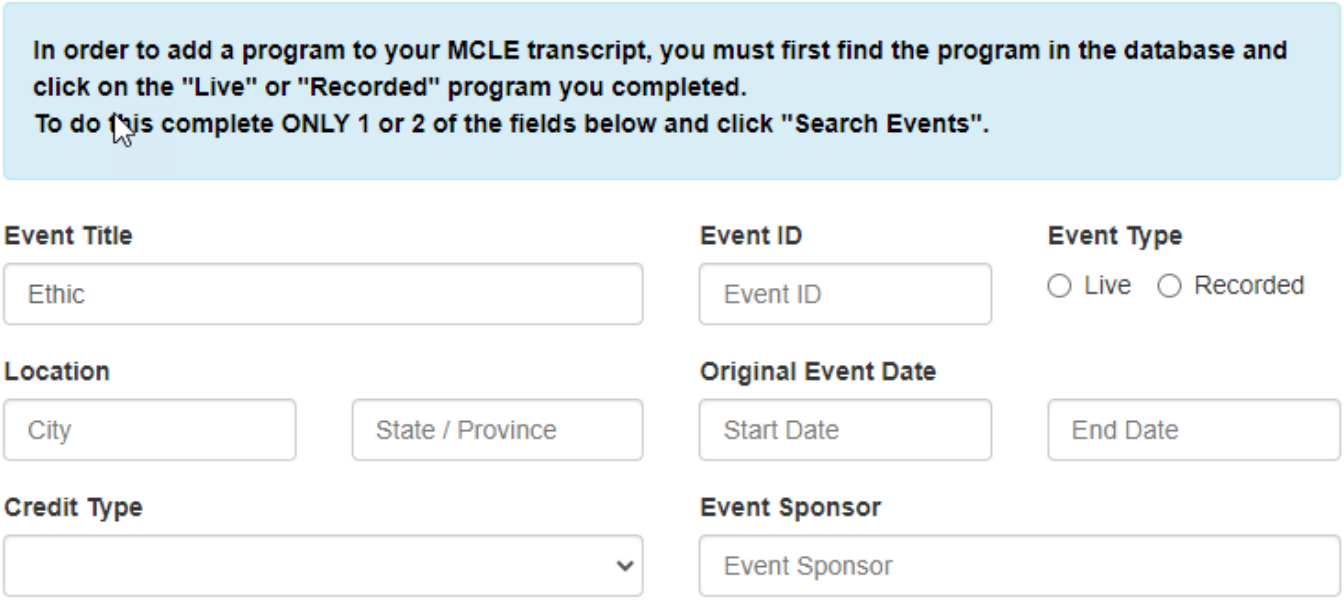
Program Search tab On this tab, you may search for live and recorded programs in the MCLE database.

The most efficient and accurate way to search the database is to enter the Event ID number, if known, for the program you wish to find. If the program is accredited in Oregon, the program sponsor will be able to provide you with the Event ID number.

If you would like to search for programs by a particular sponsor, enter the sponsor name in the Event Sponsor field and click Search Events. The results will show all accredited programs, and programs with accreditation applications pending. Programs will be displayed in date order from newest to oldest. Note, programs more than three years old are expired and no longer available for CLE credit.

TIP: The "less is more" approach works best when searching the database; you will find more relevant results by entering less information. We recommend entering information in ONLY one or two fields, such as Event Sponsor and Original Event Date range, and then clicking Search Events.

Another popular way to search is to enter the program title or a keyword in the Event Title field, such as "Ethic" as shown in the example below.



TIP: As shown below, if you searched "Ethics" you will not find a program named "Ethical Independence Day" – instead search "Ethic" to retrieve more results.

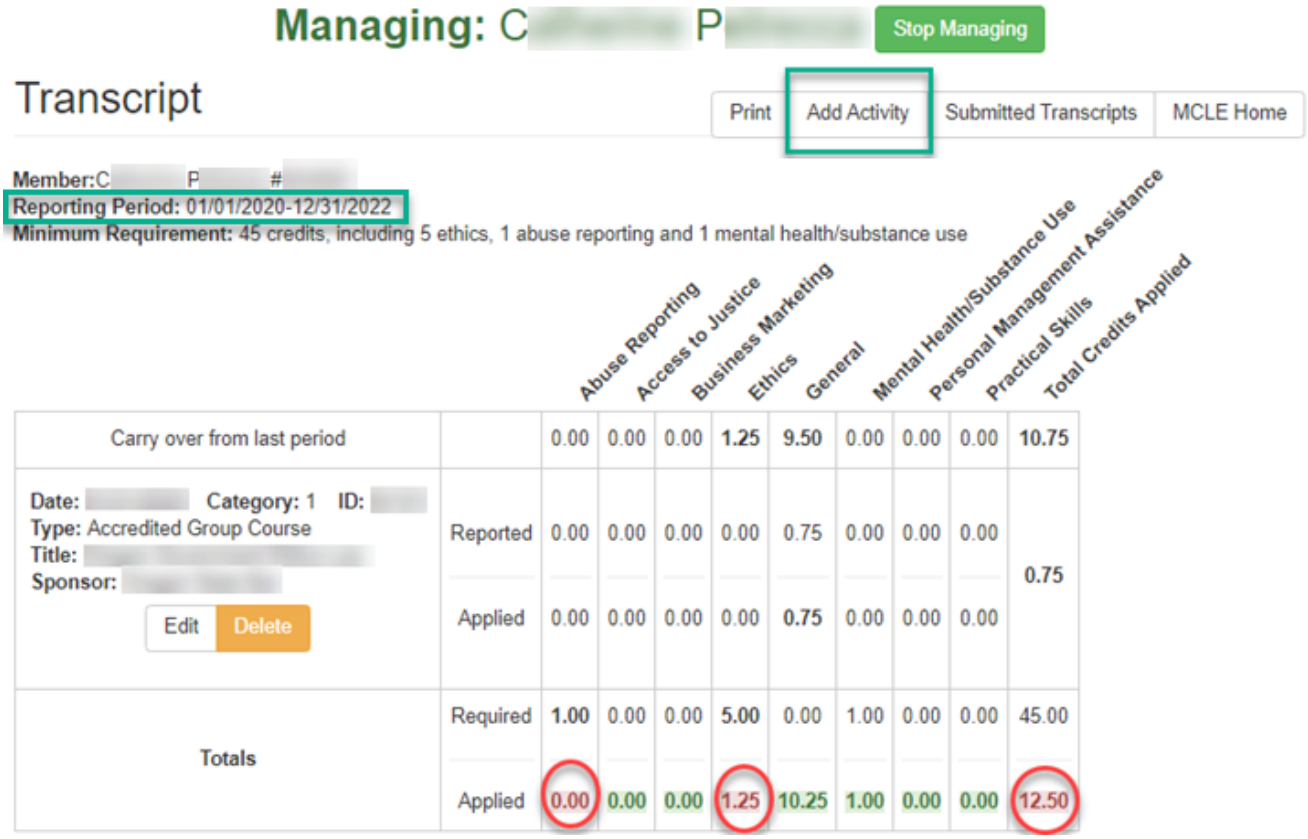
MCLE Transcript tab On this tab, you may review the MCLE Transcript, which shows the credits reported to date, and the minimum credit requirements that remain outstanding for the reporting period. You may edit the transcript using the Edit and Delete buttons, and you may use the Add Activity button to report additional credits.

The total credits reported for each credit type are applied at the bottom, with the grand total for all credits reported to date. Green indicates the minimum requirements for the particular credit type have been met, while red indicates there remain outstanding credits for that particular credit type.

When all of the minimum credit requirements have been reported on the transcript, all numbers at the bottom of the transcript will be green, and the OSB Member may log in to certify and submit their report. Only the OSB Member can certify and submit their report.

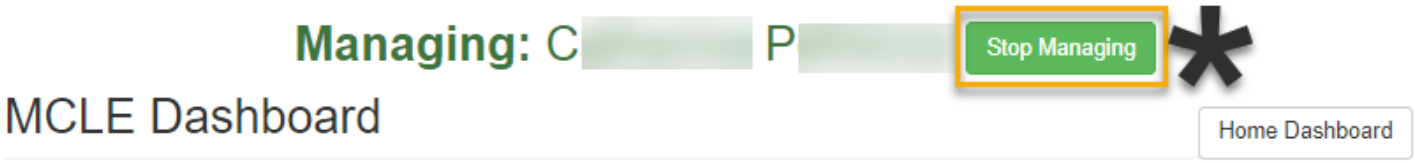
It is important to note that once the OSB Member certifies and submits their report, no additional credits may be added. If the OSB Member intends to complete additional credits before the end of the reporting period, to earn carry over credits for their next reporting period, it is important that they wait until they have completed and reported those credits before submitting their report.

In the example below, the OSB Member's minimum requirement is 45 credits. In this Reporting Period, they have completed 12.5 credits. Therefore, they must complete 32.5 more credits by the end of their reporting period. Of those 32.5 credits, 1.0 must be abuse reporting and 3.75 must be ethics.



Add Activity to Transcript tab On this tab, you may search for all MCLE activities to add to OSB Members' transcripts, including live and recorded accredited group events, Comity certificates of MCLE Compliance, Committee and council service, Judging Moot Court, Legal Ethics Service, Legal Research & Writing, Legislative Service, New Lawyer Mentoring Program, among many others. If you are reporting an OSB Member's completion of a CLE course to their transcript, choose the first activity type, 'Accredited Group Course.' This option will take you to the MCLE Program Database Search, where you will find and select the live or recorded course you wish to add to the transcript.

Stop Managing Member To finish working on a particular transcript, or to change to a different OSB Member, click on the 'Stop Managing' tab next to the OSB Member's name at the top of the screen. You will return to the MCLE Dashboard, where you can log out or start the process for the next OSB Member.



13. MCLE Dashboard tab - Sponsor Accreditation Applications and Attendance Reporting

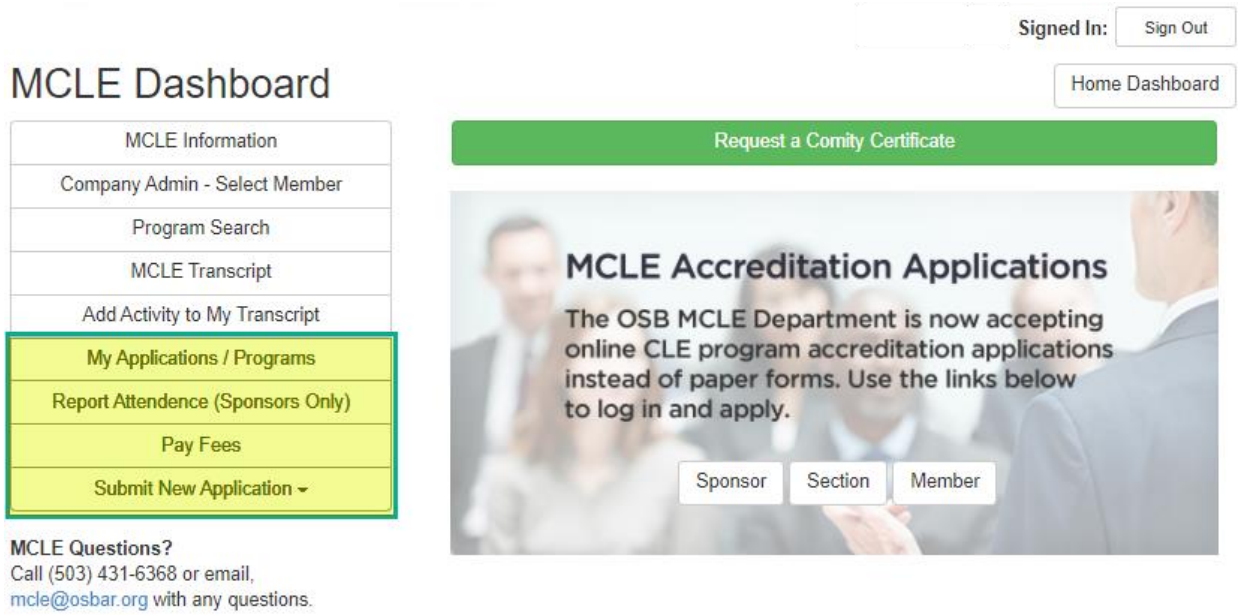
Also on the MCLE Dashboard, you may submit and make payment on MCLE Sponsor Accreditation Applications, and post attendance after completion of your company's sponsored programs.

Program Accreditation The sponsor of the program is the best applicant for accreditation of a program. Accreditation applications submitted by OSB Members who attended the program are often denied or returned for additional information and documentation, requiring the Member to contact the program sponsor for the missing items. The sponsor has the most accurate and complete information and documents related to a CLE program. Therefore, if your company did not sponsor the program, we recommend you contact the program sponsor and request the sponsor apply for accreditation of their programs in Oregon. This ensures proper accreditation and maximizes the credit OSB Members will receive for completing the program. If a sponsor is unwilling to apply for accreditation of a program an OSB Member attends, the MCLE Program Manager will do everything possible to process the OSB Member's application.

Effective March 1, 2021, the application processing fee structure changed and it now applies to program sponsors as well as individual OSB members. We recommend that you reach out to the program sponsor first and request that they apply for CLE accreditation so that the OSB Member does not have to bear the burden of paying the application fee. Should the sponsor refuse to submit the application, then in order for the OSB Member to receive CLE credit, a Member Accreditation Application must be completed and the application processing fee paid.

See New Fee Structure Frequently Asked Questions here.

TIP: Before creating an accreditation application for a CLE program, search the MCLE Program Database to be sure the program has not yet been approved for accreditation. If you submit an application for a program already in the database, your application will be denied. MCLE staff attempts to process sponsor accreditation applications within 30 days of receipt. Be mindful that turnaround time is significantly delayed during the busy compliance season. When your application is processed, you will receive an automated email letting you know whether the application was approved or denied.



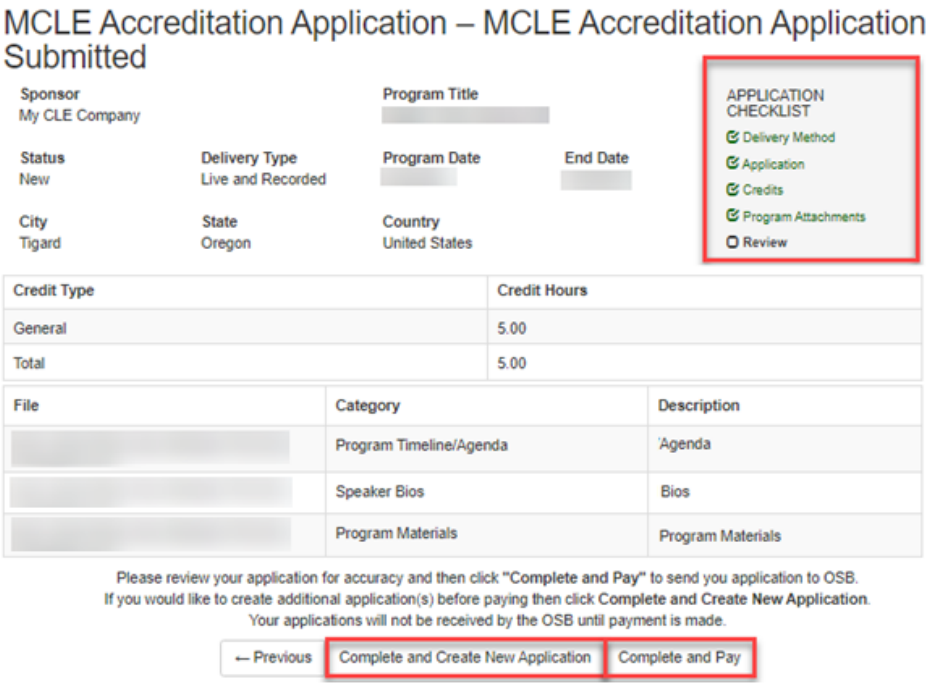
My Applications / Programs tab On this tab, you may review and check the status of MCLE sponsor accreditation applications *you* have previously submitted, or create a new application. You may also return to an application you started but have not yet submitted.

Pay Fees tab On this tab, you may pay sponsor application fees for applications *you* have submitted, by Visa, MasterCard or ACH transfer. Note, your application will not be received for review by the MCLE Department until payment of all applicable sponsor fees and late fees has been received.

TIP To pay fees for applications submitted by other individuals in your company, use the Admin Dashboard Pay Invoices tab.

Submit New Application tab
On this tab, you may submit new applications for (1) Sponsor Accreditation Applications; (2) OSB Section Accreditation Applications; and (3) Member Accreditation Applications.

Again, make sure you search the Program Database for the program prior to creating a new application. If you submit an application for a program already in the database, your application will be denied.



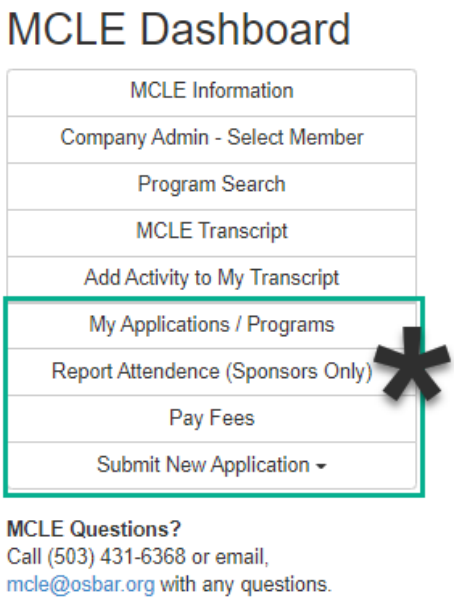
Reporting Attendance (Sponsors Only) tab On this tab, you may report attendance in bulk for your Company's sponsored programs *at no cost* by following the steps provided below.

Rule of Licensure 9.6 **requires sponsors to report attendance to OSB within 30 days of the OSB Member's completion of the program.**

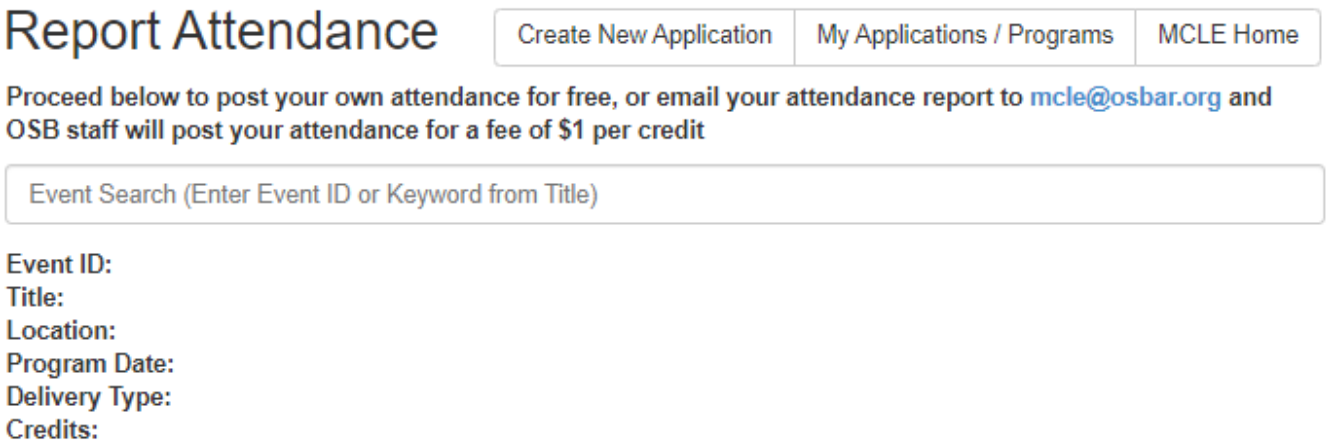
You must make payment on an Accreditation Application to report attendance on any program. If you need immediate reporting capabilities, contact the MCLE Department by email.

Option 1: Report attendance yourself *at no cost* Use the following steps to report your sponsored seminar attendance:

1. Click Report Attendance (Sponsors Only).
2. Find your program by typing the Event ID number or a Keyword from the program title in the Event Search box.
3. If your program was both live and recorded, select whether you wish to post attendance for the *live or recorded* program.
4. If you are posting credits for a recorded program, enter the member's completion date.
5. Adjust the credits to match the credits actually earned by the member.
6. Enter the member's 6-digit Bar Number in the Bar Number field.
7. Press ENTER to add this program to the member's transcript.
8. Repeat for each member who attended this program.



"Added" means these credits were added to this member's transcript.
"Duplicate" means these credits were already reported for this member.
"Member Not Found" means an incorrect or incomplete Bar number was entered.



Option 2: Pay OSB to report attendance If you prefer, OSB staff will post your attendance for a fee of $1 *per credit, per member*. You may email your attendance report by email with the following information:

1. Sponsor name,
2. Program title,
3. Event ID number as indicated in the Program Database on the OSB website,
4. Original program date,
5. First and last name of each OSB member who earned credits from the activity,
6. 6-digit OSB number for each member listed,
7. The number and types of credits earned by each OSB member, and
8. Date of credit completion for each OSB member.

Questions regarding MCLE credits and sponsor accreditation may be directed to the MCLE Department by email.