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 at companyadmin@osbar.org.

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.

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

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    - Submit New Application tab
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*Questions regarding MCLE Sponsorship may be directed to the MCLE Dept. at mcle@osbar.org.*
1. Logging into Company Administrator Dashboard

Differentiating between personal Dashboard and Admin Dashboard
When you first log in, you will be on your Dashboard, and will see options related to your OSB Member or non-member profile.

Opening Admin Dashboard
To work on Admin tasks, click on the Company Administrator Dashboard link.

Changes to Admin info
Any changes made to your personal information on the ‘Edit Your Profile’ link will remove your Admin access. To replace an Admin, or to change your name or contact information, send an email to companyadmin@osbar.org.

Company Admin Dashboard overview
When you are logged in the Admin Dashboard, you will see the following screen and options:

- CLE Registration
- Company Directory
- Company Information
- IOLTA Reporting
- MCLE Dashboard
- Order History
- Pay Invoices
- PLF Assessment
- Section Memberships

Welcome to the Company Administrator Dashboard
The links to the left can be used to review and modify your company or firm contact information, pay outstanding invoices and membership fees, report IOLTA banking information, join sections, register members for online and in-person CLE events, and to add programs and update MCLE transcripts. Please note, each member will need to log in to certify and submit their own MCLE report.

The due date for all OSB compliance is Friday, January 31, 2020.

If this is your first time accessing the Company Administrator page, begin by reviewing the list of lawyers and non-lawyers associated with your company or firm by selecting the 'Company Directory' tab. You are able to remove individuals no longer associated with your company or firm. To add individuals, please have them log in to associate themselves to your company or firm.

If you have questions please refer to the Company Administrator FAQ. For additional questions or feedback about the Company Administrator dashboard please contact Angel McCracken at companyadmin@osbar.org or 503-431-6342.
2. **Company Directory tab**

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

**Access to different office locations** To work on tasks for individuals associated to other locations, you may email companyadmin@osbar.org to request your Admin access be changed to a different location. In your email, be sure to include the address of the location 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 specific 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** Send an email to companyadmin@osbar.org with the individual’s name and any specific information related to that person (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 left of the individual’s name, and then ‘Remove From Company’ at the bottom of the page. The company name and website will be removed from the individual’s record; however, all other information will remain intact until the individual updates their contact information. It is the responsibility of each OSB Member to keep their contact information up-to-date.
3. **Company Information tab**

On this tab, you may edit the company contact information. OSB Rules of Procedure require all PO Box designations must be accompanied by a physical address.

**Global address changes** Any changes made to the company information will trickle down to all individuals associated with 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 uses a home or a satellite office address on their Member Record).

**Address change confirmation** Each Admin and OSB Member associated to the company will receive an automated email showing the updated information. Address changes are processed by our system overnight, so the updated information will appear on the OSB Membership Directory, and will be provided to the PLF and court systems, the following day.

![Edit Company Information](image-url)
4. **Pay Invoices tab**

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 products.

**Reviewing invoices; Order Confirmation screen** 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.

**TIP:** The OSB 2020 Licensing Fees for Active Members (over-2 years) was $592. If you see an amount greater than $592, the order may include a Section Membership, as indicated in Order #84812 below, in the amount of $612, which includes an Administrative Law Section membership.

### Pay Invoices

<table>
<thead>
<tr>
<th>Order</th>
<th>Name</th>
<th>Date</th>
<th>Line 1</th>
<th>Balance</th>
<th>Pay Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>84985</td>
<td></td>
<td>5/26/2020</td>
<td>Family Law Section</td>
<td>$25.00</td>
<td>$ 0.00</td>
</tr>
<tr>
<td>84812</td>
<td></td>
<td>4/2/2020</td>
<td>2020 Active Membership Fee</td>
<td>$612.00</td>
<td>$ 0.00</td>
</tr>
</tbody>
</table>

**Payment information**

- Credit Card
- ACH

**Order Confirmation**

- Order Number: 84812
- Order Type: Quotation
- Status: Taken
- Payment Method: Purchase Order
- Bill To: Oregon State Bar
  - United States
- Customer Number: 27861
- Shipment Method: Shipping Charge
- Date Shipped: Not Shipped
- Ship To: [Address Redacted]

<table>
<thead>
<tr>
<th>Product</th>
<th>Description</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Total Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020 Active Membership Fee</td>
<td>Individual Sub</td>
<td>1</td>
<td>$592.00</td>
<td>$592.00</td>
</tr>
<tr>
<td>Administrative Law Section</td>
<td>Individual Sub</td>
<td>1</td>
<td>$20.00</td>
<td>$20.00</td>
</tr>
</tbody>
</table>

Sub-Total: $612.00
4. Pay Invoices tab, continued

**OSB Member licensing fee order is not displayed** If an OSB Member joins the company after the licensing fees are assessed, but before the licensing fee invoice is paid, 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,’ contact companyadmin@osbar.org.

**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 select all invoices by clicking on the green ribbon checkbox.

**Payment methods** Payment may be made by Visa, MasterCard or Automated Clearing House (ACH), a secure electronic funds-transfer system that transfers money from the company’s checking account. After entering the payment information, click on the ‘Make Payment’ button.

**Payment summary and receipt** If the payment is successfully processed, you will be shown a ‘Payment Summary’ of each Order number, and 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, consider printing a copy of the ‘Order Confirmation’ screen from the Order History tab, as described below.

**Payment issues** If the order is not successfully processed, try to submit the order again, confirming the accuracy of the credit card number, credit card security number and expiration date, or ACH routing and bank account numbers. If the payment is again unsuccessful, contact the OSB Accounting Department at accounting@osbar.org with the Order number(s) and error details.

**Payment for companies with 25+ members** If you are unable to process payment through the Admin Dashboard due to limits imposed by the credit card issuer, or bank for ACH transfers, contact companyadmin@osbar.org to discuss available options for large payments.
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 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 invoices that were paid by the company, or need to be associated to the company, but are not included in the Order History tab, contact companyadmin@osbar.org.

**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**

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 their yearly Section Membership, click on the “Add/Edit” button to the right of their name. Section memberships already purchased for the current year will be greyed out, and Section memberships from last year, that have not yet been renewed this year, will be pre-checked.
Avoiding duplicate Section memberships purchases If you or the individual had previously chosen Section memberships, but have not yet made payment, you will see “<#> pending items” on the Section Memberships page. Those Section memberships will appear in the Pay Invoices tab, and in the Order History tab, with a balance due. If payment is not made on these invoices within a reasonable period of time, they will be deleted.

Complementary Section memberships Some OSB Sections offer complimentary membership to New Members (admitted on or after October 1 of the previous year), and 50-Year Members. If these members would like to join or renew a complementary Section membership, and that is the only item in the Cart, contact companyadmin@osbar.org, as the Cart will not process a $0 payment.

Some OSB Sections also offer complementary membership to Judges, Judge’s staff, Law Students and Law Associates. These OSB Members and individuals should complete and submit the appropriate form, found at https://www.osbar.org/forms#section.
7. **IOLTA Reporting tab**

On this tab, you may submit OSB Members’ Interest On Lawyers Trust Account (IOLTA) reports. All active OSB Members must submit a yearly IOLTA report, including OSB Members who reside in other states, and OSB Members who do not hold client funds.

**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 firm, you may ‘Remove’ any OSB Members from each reporting scenario if it does not apply to them, submit the current report, then submit a different report for those other OSB Members.

**Submission confirmation; printing a receipt** You will receive an on-screen confirmation when each report is submitted; however, the confirmation will not show which option was reported for each OSB Members, or any banking information.

**TIP:** Print each reporting screen before submitting the report, as a receipt.

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**Company IOLTA Report**

**Reporting for: Oregon State Bar**

1. We maintain the following lawyer trust accounts in Oregon for the purpose of holding client funds or the funds of third persons, under RPC 1.15-1 and RPC 1.15-2.

<table>
<thead>
<tr>
<th>Name of Financial Institution</th>
<th>Bank Routing Number</th>
<th>Oregon IOLTA Trust Account Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Our office is in another jurisdiction. We maintain lawyer trust accounts for the purpose of holding client funds or the funds of third persons, but those accounts are not located in Oregon.

3. We do not hold client funds or the funds of third persons, and we do not maintain any lawyer trust accounts.

**Below is a list of members associated with your firm.**

Please remove any members who are not associated with the trust account you are reporting.

<table>
<thead>
<tr>
<th>Bar Number</th>
<th>Name</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
8. **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 review the PLF Assessment. OSB Members must log into their Member Dashboard to review and pay their PLF Assessment.

9. **CLE Registrations tab**

This tab will direct you to Frequently Asked Questions, where it is recommended that you contact the CLE Service Center at (503) 431-6413 before making a purchase, to ensure the individual for whom the purchase was made may access the seminar or materials.

**TIP**: Ask if there are any date restrictions in place regarding when an individual may register in advance for a future seminar.

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.
10. **Product Catalog ribbon, continued**

Categories include:

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

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

- **Diversity & Inclusion** Video-On-Demand products.

- **Public Information** Printed information regarding Legal Information for Older Adults, Landlord Tenant Information and other pamphlet products.

**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.

**Check Out: Step 1 of 2**

Default shipping address and other settings are shown below. Use the buttons to make any changes. When you are done, click the Next Step button.

**SELECT TYPE OF ORDER**

<table>
<thead>
<tr>
<th>Corporate Order</th>
<th>Personal Order</th>
</tr>
</thead>
</table>

**Shipping Details**

Shipping To: Angel McCracken/Oregon State Bar  
PO Box 231935  
Tigard, OR 97281-1935  
United States

- Change Address
- Change Ship To

**Order Summary**

<table>
<thead>
<tr>
<th>Sub-Total:</th>
<th>$20.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shipping &amp; Handling:</td>
<td>$0.00</td>
</tr>
<tr>
<td>Tax:</td>
<td>$0.00</td>
</tr>
<tr>
<td>Total:</td>
<td>$20.00</td>
</tr>
</tbody>
</table>

**ITEMS IN SHOPPING CART**

<table>
<thead>
<tr>
<th>Remove</th>
<th>Product</th>
<th>Item Description</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Total Price</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Certificate of Disciplinary History</td>
<td>For [centered text]</td>
<td>$20.00</td>
<td>1</td>
<td>$20.00</td>
</tr>
</tbody>
</table>

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

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.

MCLE Dashboard

MCLE Information tab
On this tab, you will find information and rules regarding MCLE, including instructions for first-time reporters, completion of New Lawyer Mentoring Program, Out-of-State reporters, Reciprocal State Bars, Reinstated OSB Members, Three-Year Reporting Cycle and MCLE Compliance Reporting FAQ’s. The answers to many MCLE questions can be found here.

Company Admin – Select Member and Manage tab
On this tab, you may manage the MCLE credit reporting for OSB Members, one at a time. 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>” 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 OSB Member’s transcript by adding or deleting credits. Detailed instructions for these processes are outlined below in the MCLE Transcript section of this manual.

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.

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.

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, for that sponsor. 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.
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.

In order to add a program to your MCLE transcript, you must first find the program in the database and click on the “Live” or “Recorded” program you completed. To do this, complete ONLY 1 or 2 of the fields below and click “Search Events”.

<table>
<thead>
<tr>
<th>Event Title</th>
<th>Event ID</th>
<th>Event Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ethic</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Location</th>
<th>Original Event Date</th>
<th>Event Sponsor</th>
</tr>
</thead>
<tbody>
<tr>
<td>City</td>
<td>Start Date</td>
<td></td>
</tr>
<tr>
<td>State / Province</td>
<td>End Date</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Credit Type</th>
<th>Event Sponsor</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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 for the reporting period that remain outstanding. You may edit the transcript using the Edit and Delete buttons. You may report additional credits using the Add Activity button.

At the bottom of the transcript you will see the total credits reported for each credit type, as well as the grand total for all credits types 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. Once 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 can certify
and submit their report. Only the OSB Member can certify and submit their report; the Admin is not authorized to complete this task.

It is important to note that once the OSB Member certifies and submits their report, no additional credits may be added. So, if the OSB Member intends to complete additional credits before the end of the reporting period in order to earn carry over credits for their next reporting period, it is important that they wait until they have completed 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, as shown above, 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.

My Applications tab On this tab, you may review and check the status of MCLE accreditation applications previously submitted, or create a new application. 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. Once your application is processed, you will receive an automated email letting you know whether the application was approved or denied.
Pay Application Fees tab On this tab, you may pay sponsor application fees by credit card of 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.

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.

Program Accreditation The best applicant for accreditation of a program is the sponsor of the program. Accreditation applications submitted by OSB Members who attended the program are often denied or returned for additional information and documentation, requiring the OSB Member to reach out to the program sponsor for the missing items. The sponsor has the most accurate and complete information and documents related to a CLE program. Therefore, 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.

Questions regarding MCLE credits and sponsor accreditation may be directed to the MCLE Department at mcle@osbar.org.