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.

Contents

1. Logging into Company Administrator Dashboard .............................................................. 3
   • Differentiating between personal Dashboard and Admin Dashboard
   • Opening Admin Dashboard
   • Changes to Admin info
   • Company 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
   • Bank transfer or credit card amount limits
   • Payment issues
   • Payment summary and receipt

5. Order History tab (displays processed 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. **IOLTA Reporting tab** ..................................................................................................................... 11
   - Submitting multiple reports
   - Submission confirmation; printing a receipt

8. **PLF Assessment tab** ....................................................................................................................... 12

9. **Product Catalog ribbon** ............................................................................................................... 12-13
   - Categories
   - Shipping products to other addresses or individuals

10. **CLE Registration tab** .................................................................................................................. 13-14
    - Registering OSB Members for CLE events [*Reminder: In order to receive CLE credit, OSB Members must be registered using their primary email address*]
    - Applying coupon codes

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

11. **MCLE Dashboard tab** .................................................................................................................. 15-20
    - MCLE Information tab
    - Company Admin – Select Member and Manage tab
      ▪ Program Search tab
      ▪ MCLE Transcript tab
      ▪ Add Activity to Transcript tab
      ▪ Stop Managing Member
    - My Applications tab
    - Pay Application Fees tab
    - Submit New Application tab
    - Program Accreditation

   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 personal Dashboard, with options related to your OSB Member or non-member profile.

Opening Admin Dashboard
To work on Admin tasks, click on the Company Admin 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:
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 companyadmin@osbar.org 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 send an email to companyadmin@osbar.org 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 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 1.11(a) requires all PO Box address designations must be accompanied by a street address.

**Global address changes** 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 company contact information. Address changes are processed by the system overnight; 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**

<table>
<thead>
<tr>
<th>* Designates required field.</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Name</td>
</tr>
<tr>
<td>Oregon State Bar</td>
</tr>
<tr>
<td>Website</td>
</tr>
<tr>
<td><a href="http://www.osbar.org">www.osbar.org</a></td>
</tr>
<tr>
<td>Acronym</td>
</tr>
<tr>
<td>Phone: Country code, area code and number.</td>
</tr>
<tr>
<td>1 (503) 620-0222</td>
</tr>
<tr>
<td>* Street Address</td>
</tr>
<tr>
<td>16037 SW Upper Boones Ferry Rd</td>
</tr>
<tr>
<td>PO Box 231935</td>
</tr>
<tr>
<td>City</td>
</tr>
<tr>
<td>Tigard</td>
</tr>
<tr>
<td>+ Add Billing Address</td>
</tr>
<tr>
<td>+ Add PO Box</td>
</tr>
</tbody>
</table>

**Save changes**
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 other 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 2021 Licensing Fee for Active Members is $617. If you see an amount greater than $617, as shown in Order #84812 below for $637, it may include other items, such as Section memberships.

---

### 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>88985</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>4/1/2020</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Payment Information**
- Credit Card □ ACH □
- Card Number: [redacted]
- Security #: [redacted]
- Expiration Date: June 2021

**Order Confirmation**
- Order Number: 84812
- Order Type: Quotation
- Status: Taken
- Payment Method: Purchase Order
- Ship To: Oregon State Bar, United States

<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>2021 Active Membership Fee</td>
<td>Individual Sub:</td>
<td>1</td>
<td>$617.00</td>
<td>$617.00</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: $637.00

---
OSB Member licensing fee order is not displayed 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,’ 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 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.

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, and try again. If the issue remains, contact your bank or your credit card company to determine any concerns within their system. Lastly, contact the OSB Accounting Department at accounting@osbar.org 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’ 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, 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, 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 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 their yearly Section Membership, 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, and Section memberships from last year, that have not yet been renewed this year, will be pre-checked.

Section memberships are based on a calendar year. Use the ‘Add/Edit’ button to modify section memberships for 2021.

**Select section memberships for 2021**
Sections joined in 2020 are pre-checked and must be unchecked if you don’t want to renew. Any sections already purchased for 2021 are greyed out.
Avoiding duplicate Section membership purchases As shown below, if Section memberships were selected but not yet purchased, they will appear in three areas: (1) on the Section Memberships page as “<#> pending items”, (2) on the Pay Invoices tab, and (3) on the Order History tab, as a Purchase Order with a balance due. These 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), and 50+ Year Members. You may purchase all Sections for these members through the Admin dashboard; however, complimentary sections must be processed with another item or order requiring payment, such as a licensing fee order, as the cart will not process a $0 payment.

Some OSB Sections also offer complementary membership to Judges and Judge’s staff. To order complimentary sections for these members, complete and return the appropriate form(s), found at https://www.osbar.org/forms#section to companyadmin@osbar.org.
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.

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>

Save

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>Remove</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Remove</td>
</tr>
</tbody>
</table>

Remove
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. **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 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.

10. CLE Registration 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 registering for an event, to ask if there are any date restrictions in place regarding when individuals may be registered for future seminars.

In the Product Catalog, you may search by the CLE sub-categories or by key word(s) to narrow the results. You may click on a blue event title to open the event details information page, which provides coupon codes and other membership-based discounts in red text.
Registering OSB Members for CLE events: **In order to receive CLE credit, OSB Members must be registered using their primary email address.** You may confirm OSB Members’ primary email address using the online [Membership Directory](#). Once registered, each individual will receive an email confirmation, and a separate email with instructions for how to access the webinar or downloadable content.

**Applying Coupon Codes** When you are done registering individuals, apply the coupon code from the Details screen in the Cart. The Details screen can be accessed by clicking the Details… button shown.

*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. You may sort by any field, including the Reporting Period, 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>” 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.

**TIP:** As shown in the second screenshot below, if you searched “Ethics” you will not find a program named “Ethical Independence Day” – instead search “Ethic” to retrieve more results.

![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".](image)

**Event Title**
Ethic

**Location**
City
State / Province

**Credit Type**

**Event ID**

**Event Type**
○ Live ○ Recorded

**Original Event Date**
Start Date
End Date

**Event Sponsor**

**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.
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 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 when 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. When 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 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.

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.