

Attorney Services Portal User Guide

Date: June 2, 2015

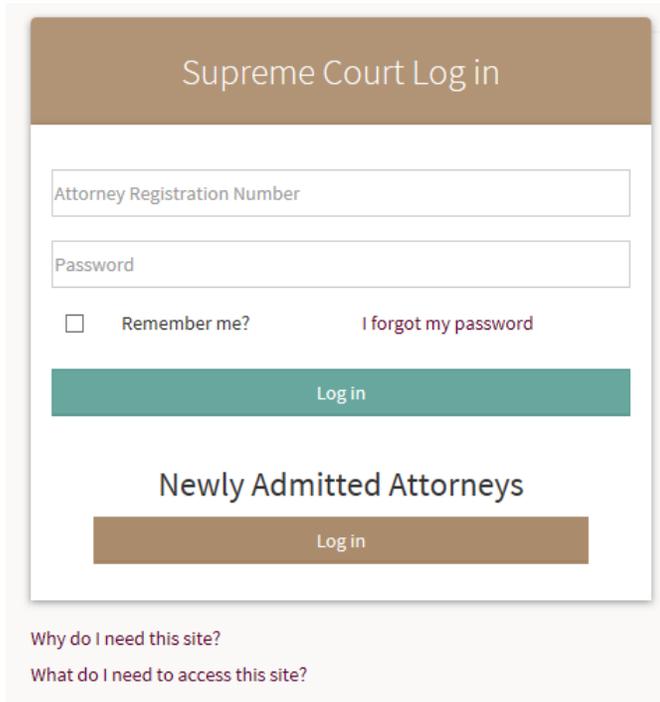
Table of Contents

1. Login.....	3
1.1. Attorneys.....	3
1.2. Newly Admitted Attorneys	3
2. Password Recovery	4
3. Home Screen.....	5
3.1. Left Navigation Menu	5
3.2. Home Screen Navigation.....	5
3.3. Attorney Information Summary.....	6
3.4. Compliance Period Selection Box	6
3.5. Requirements Status.....	6
3.6. CLE Requirement Tiles	6
3.7. CLE Requirement Sentences	7
3.8. CLE Requirement Matrix.....	8
4. Edit Info.....	9
5. Registration.....	9
5.1. IOLTA Submission.....	9
5.2. Attorney Registration.....	10
5.3. Magistrate Notification.....	12
6. Submit and Edit CLE Credits.....	13
7. Suspensions.....	13
8. Sanction Fees	14
9. Site Navigation	16

1. Login

1.1. Attorneys

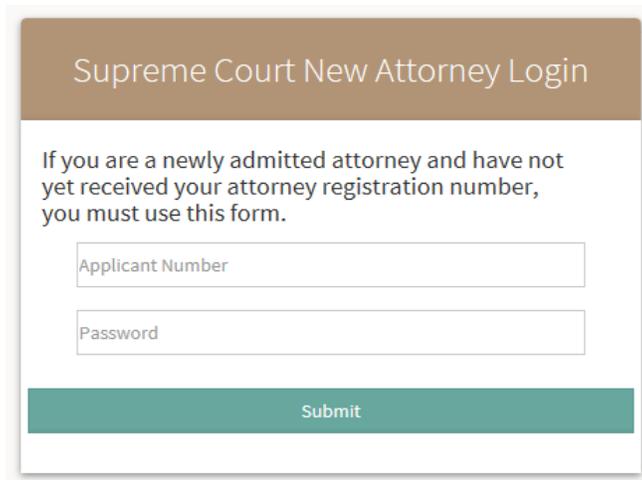
Existing attorneys will log into the Attorney Services Portal using their existing Attorney Registration Number and password.



The screenshot shows a login interface with a brown header containing the text "Supreme Court Log in". Below the header are two input fields: "Attorney Registration Number" and "Password". Under the "Password" field, there is a checkbox labeled "Remember me?" and a link "I forgot my password". A green "Log in" button is positioned below these elements. Below the "Log in" button, the text "Newly Admitted Attorneys" is displayed, followed by a brown "Log in" button. At the bottom of the page, there are two links: "Why do I need this site?" and "What do I need to access this site?".

1.2. Newly Admitted Attorneys

Newly admitted attorneys logging into the portal for the first time will use the new attorney login screen accessible by clicking the Newly Admitted Attorneys log in button. New attorneys will use the applicant number and password provided to them.



The screenshot shows a login interface with a brown header containing the text "Supreme Court New Attorney Login". Below the header, there is a paragraph of text: "If you are a newly admitted attorney and have not yet received your attorney registration number, you must use this form." Below this text are two input fields: "Applicant Number" and "Password". A green "Submit" button is located at the bottom of the form.

2. Password Recovery

To recover your current Attorney Registration password, enter your Attorney Registration Number and click the “I Forgot My Password” button. Your password will be emailed to the email address associated with your Attorney Registration Number.

Supreme Court Log in

Attorney Registration Number

Password

Remember me? [I forgot my password](#)

Log in

Newly Admitted Attorneys

Log in

If you have no email address on file, or if you have changed your email address, you can recover your Attorney Registration password by clicking on the “I Forgot My Password” button on the login screen and providing your Attorney Registration Number, an email address, and the last four digits of your social security number. Your password will be emailed to the email provided.

Forgot Password

Please enter your email, and the last four digits of your SSN below and Submit

Attorney Registration Number

Email

Last four digits of SSN

Submit

3. Home Screen

The screenshot shows the Attorney Services Portal home screen. The page includes a navigation menu on the left (1), a search bar (2), a registration status summary (3), a profile information table (4), a CLE requirement section (5), a progress bar for CLE completion (6), a summary of requirements (7), and a detailed table of requirements and completion (8).

1 Portal

2 Register Edit info Change Password Update R/LTA/OTA Information Pre-Register

3 You have already pre-registered for Active status for the new biennium 2015-2017.
 Registration Number: 100000 Status: Active Last Registration: 09/01/2013

4 Residence: 1234 Country Place, Columbus, OH 43215 Email: test@sc.ohio.gov
 Employer: Attorney 1234 LLC. Office Phone: 123-456-7890
 Office Address: 1234 Country Place, Columbus, OH 43215 Gender: M
 Date of Admission: 11/06/2006 Date of Birth: 7/9/1961
 Race: White Hispanic/Latino: No

5 CLE Requirement as an Attorney For Compliance Period: 1/1/2014 - 12/31/2015

6 You have met the requirement for compliance period 1/1/2014 - 12/31/2015.

7 Attorney Conduct: 2.50 hour(s) required, 4.00 hour(s) completed, 100% completed
 Total: 12.00 hour(s) required, 24.25 hour(s) completed, 100% completed

8 You have an Attorney Conduct adjusted requirement of 2.50 hours and have completed 4.00 hours.
 You have a Total hours adjusted requirement of 12.00 hours and have completed 24.25 hours.

	Current Requirement	Previous Carryover/Deficiency	Adjusted Requirement	Completed	Carryover/Deficiency
Attorney Conduct	2.50	0.00	2.50	4.00	0.00
Total	24.00	12.00	12.00	24.25	12.00

3.1. Left Navigation Menu

A menu containing navigational links to all pages of the portal and external link. The menu function by sliding open and closed.

3.2. Home Screen Navigation

Register

Takes the attorney to the registration page where the attorney can register for Active, Inactive, or Corporate status.

Edit Info and Change Password

Allows an attorney to edit email, residence, and office information, enter required race and ethnicity information, and change the password.

Update IOLTA/IOTA Information

Redirects the user to the OLAF (“Ohio Legal Assistance Foundation”) site where IOLTA and IOTA account information can be updated separately from the attorney registration process.

3.3. Attorney Information Summary

Provides a summary of the attorney’s contact and demographic information.

3.4. Compliance Period Selection Box

Allows an attorney to view CLE requirements for the current and all previous biennia since admission.

3.5. Requirements Status

A descriptive sentence above the tiles indicates whether an attorney has or has not met their education requirements.

3.6. CLE Requirement Tiles

The CLE tiles provide an at-a-glance overview of CLE requirements for the selected compliance period. Each tile highlights the number of hours required, hours completed, and percentage complete for each of the requirements. All CLE tiles will display in red until all of the requirements for the compliance period have been met. Once the requirements have been met, the tiles will change to green.





3.7. CLE Requirement Sentences

Below the CLE requirement tile section is a written description of the attorney's requirements and the number of hours completed.

You have an Attorney Conduct adjusted requirement of 2.50 hours and have completed 4.00 hours.
You have a Total hours adjusted requirement of 12.00 hours and have completed 24.25 hours.

3.8. CLE Requirement Matrix

The CLE requirement matrix details an attorney's CLE requirement hours for the selected compliance period.

	Current Requirement	Previous Carryover/Deficiency	Adjusted Requirement	Completed	Carryover/Deficiency
Ethics	1.00	0.00	1.00	1.00	0.00
Professionalism	1.00	0.00	1.00	1.00	0.00
Substance Abuse	0.50	0.00	0.50	0.50	0.00
Total	24.00	4.25	19.75	23.50	3.75

Number of hours required in the **current compliance period**.

Adjusted number of hours required in the **current compliance period**.

Deficiency indicates number of hours to be completed in the **current compliance period**. Carryover indicates hours applied towards the **next compliance period**.

[View / Print Transcript](#)

View and print Transcript

Number of hours carried over from or deficient in the **previous compliance period**.

Number of hours completed in the **current compliance period**.

Current Requirement +/- Previous Carryover or Deficiency = Adjusted Requirement
Adjusted Requirement - Completed = Carryover/Deficiency

4. Edit Info

Provides a way for attorneys to edit their residence information, office information, and change their Attorney Services password. Some address fields are required or conditionally required depending on whether the address is domestic or international.

The screenshot shows a web form titled "My Information" with a "Logout" button in the top right corner. The form is divided into three main sections: "General Information", "Residence Information", and "Office Information".

General Information:

- Name: First Name Middle Name Last Name
- *Email: test.test@test.com
- *Race: White, Black or African American, Asian, American Indian or Alaska Native, Native Hawaiian or Pacific Islander
- *Are you Hispanic/Latino? Yes No
- Change Password section with fields for Current Password, New Password, and Password Confirmation.

Residence Information:

- *Country: United States
- *Address: 3701 Connecticut Avenue, N.W.
- Address 2: Apt. 462H
- City: Washington
- State/Province: District of Columbia
- Zip/Postal Code: 20008

Office Information:

- Country: United States
- Employer: Federal Government (SEC)
- Title: Special Counsel
- Phone: 202-551-2536
- Fax:
- Address: 200 F St NE
- Address 2:
- City: Washington
- State/Province: District of Columbia
- Zip/Postal Code: 20540

At the bottom of the form are "Submit" and "Cancel" buttons.

5. Registration

5.1. IOLTA Submission

As part of the attorney registration process, attorneys must specify whether they maintain an IOLTA / IOTA account, the account information and whether they are a title agent. The form data are submitted directly to OLAF to fulfill the IOLTA / IOTA reporting requirement.

IOLTA / IOTA Registration
 Please contact OLAF regarding IOLTA / IOTA questions

Attorney Registration Number: 100000
 Email Address: test@sc.ohio.gov

Section 1: IOLTA/IOTA Status

I do maintain IOLTA and/or IOTA Account(s).
 I do **NOT** maintain IOLTA and IOTA Account(s).

Section 2: Title Agent Status

I am **NOT** a licensed title insurance agent in the State of Ohio.
 I am a licensed title insurance agent in the State of Ohio.

Account Information

N/A

[Submit IOLTA/IOTA](#)

5.2. Attorney Registration

Upon submitting the IOLTA / IOTA form, attorneys are presented with the attorney registration form.

 [Home](#) - [Portal](#) [Log out](#)

Attorney Registration

- Thank you for submitting your IOLTA/IOTA information.
- To complete your registration, please select the biennium and registration status for which you are registering.
- If you have a question regarding the status for which you should register, please review Gov. Bar R. VI.

Choose Registration: Biennium: 2015-2017
 Registration Status:

After selecting the appropriate biennium and registration status, an attorney is presented with a credit card payment form if the status for which the attorney is registering contains a registration and/or late fee.

After clicking the register button, any applicable payment and registration information will be submitted. A registration success message will display upon successful registration.

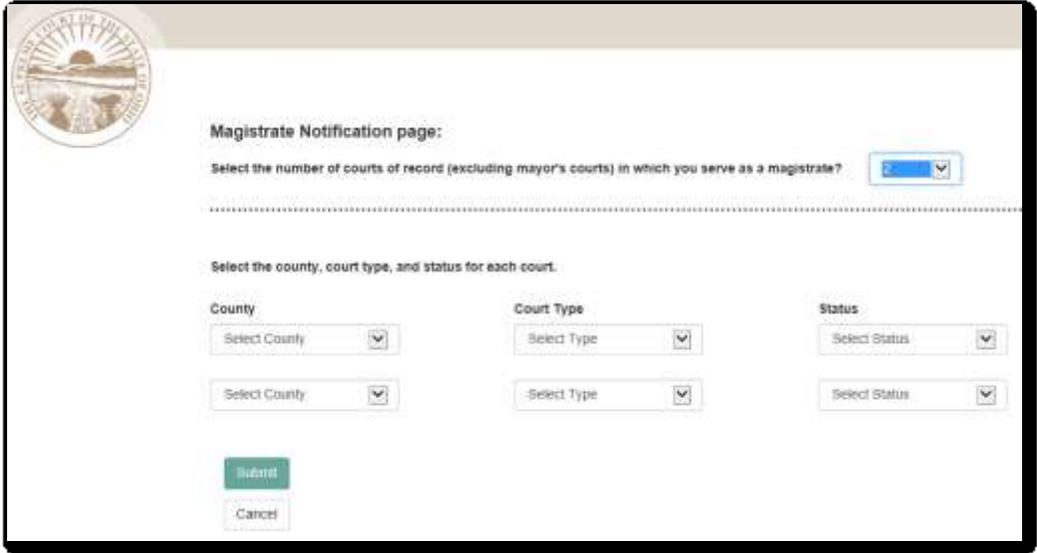
Your registration status will be updated once the daily processing of registrations completes. Until that time, you will see a message display on the Home screen stating that you have a registration pending.

FirstName MiddleName LastName

You have a pending registration that has not been processed by the Attorney Services office. You have already pre-registered for the new biennium 2015-2017

5.3. Magistrate Notification

Upon successful registration attorneys are asked whether they are a magistrate in a court of record. By answering “Yes, Continue” a Magistrate is taken to an additional screen on which the Magistrate identifies the County, Court Type, and Status for each court of record in which the Magistrate serves. (The magistrate notification screen is not a substitution for the annual magistrate registration filing required by Gov. Bar R. X, Sec. 10(C)).



Magistrate Notification page:

Select the number of courts of record (excluding mayor's courts) in which you serve as a magistrate?

Select the county, court type, and status for each court.

County	Court Type	Status
<input type="text" value="Select County"/>	<input type="text" value="Select Type"/>	<input type="text" value="Select Status"/>
<input type="text" value="Select County"/>	<input type="text" value="Select Type"/>	<input type="text" value="Select Status"/>

6. Submit and Edit CLE Credits

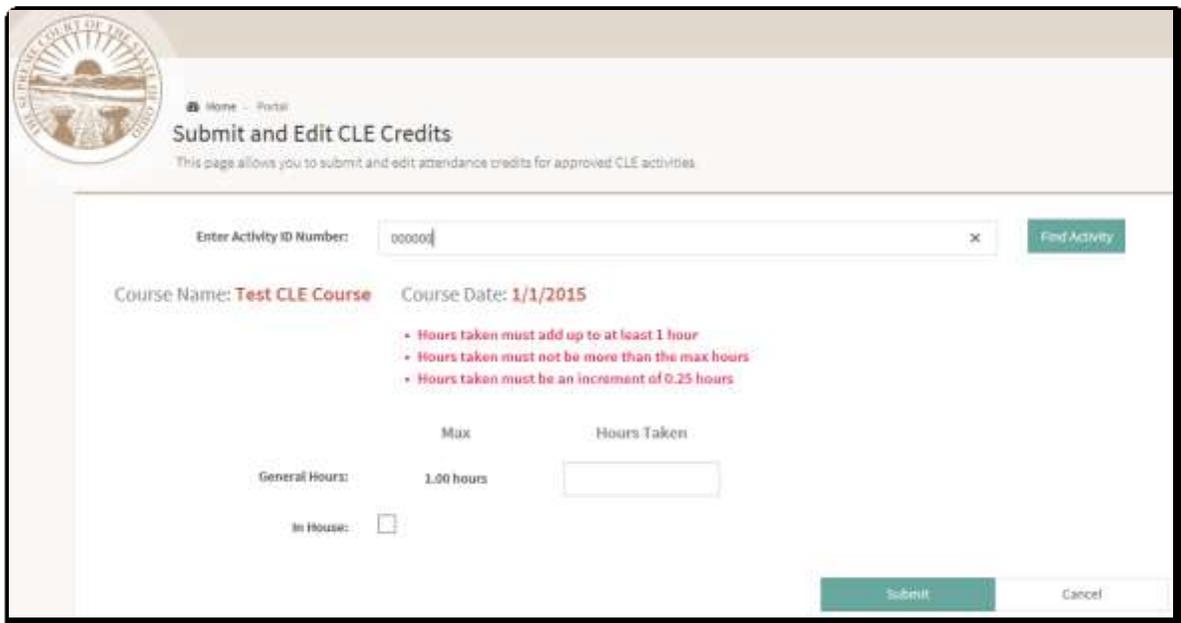
The Submit and Edit CLE Credits screen, accessible from the CLE section of the left navigation menu, allows attorneys to submit CLE Credits. To submit credits an attorney must first enter the Activity Number for the CLE Activity the attorney attended. Attorneys can designate “in-house” credits by checking the appropriate box. Additionally, attorneys have the ability to edit previously submitted hours should a mistake have been made.

Credits being submitted must meet the following rules:

Hours taken must add up to at least 1 hour

Hours taken must not be more than the maximum number of hours awarded to the activity

Hours taken must be taken in increments of .25 hours



The screenshot shows a web form titled "Submit and Edit CLE Credits" with the subtitle "This page allows you to submit and edit attendance credits for approved CLE activities." The form includes a search field for "Enter Activity ID Number:" with the value "00000" and a "Find Activity" button. Below this, the course information is displayed: "Course Name: Test CLE Course" and "Course Date: 1/1/2015". A list of rules is shown in red text: "Hours taken must add up to at least 1 hour", "Hours taken must not be more than the max hours", and "Hours taken must be an increment of 0.25 hours". A table with two columns, "Max" and "Hours Taken", is present. The "General Hours" row shows a "Max" of "1.00 hours" and an empty "Hours Taken" input field. The "In House" row has an unchecked checkbox. At the bottom right, there are "Submit" and "Cancel" buttons.

7. Suspensions

The Home screen contains a notification box if an attorney is currently suspended from the practice of law.

An attorney who is suspended from the practice of law for failing to timely register is not permitted to use the online site to register, change a registration status, or pre-register for the next biennium. Attorneys should contact the Office of Attorney Services for information regarding reinstatement to the practice of law.

The screenshot displays the Attorney Services Portal interface. At the top left is the Supreme Court of Ohio logo. The main header includes the text "Attorney Services Portal" and a "Log out" button. A notification banner states "Pre-registration for the 2015-2017 biennium begins July 1". Below the header, the user's name is shown as "FirstName MiddleName LastName". A navigation menu on the left lists "Portal", "My Information", "CLE", "Requests", "Help", "Contacts", and "Supreme Court of Ohio". The main content area features a row of action buttons: "Register", "Edit Info", "Change Password", "Update JOLTA/JOTA Information", and "Pre-Register". A red box highlights this row and a message below it: "You are currently under Attorney Registration suspension." Below this, the user's registration details are shown: "Registration Number: 100000", "Status: Not registered", and "Last Registration:". Another red box highlights a message: "You're currently suspended". A table of personal and professional information follows, including residence, employer, office address, date of admission, race, and date of birth. At the bottom, the "CLE Requirement as an Attorney" section shows a compliance period of "1/1/2014 - 12/31/2015".

8. Sanction Fees

If an attorney owes CLE sanction fees, a message will display on the home screen. A link is provided to navigate to the CLE Sanction Fee payment screen to pay any outstanding fees. If no fees are owed then the Sanctions Fee Owed section will not display.

Home > Portal

Attorney Services Portal

Pre-registration for the 2015-2017 biennium begins July 1

FirstName MiddleName LastName

Register Edit Info Change Password Update IOLTA/IOTA Information Pre-Register

You are currently under Attorney Registration suspension. You are currently under CLE suspension.

Registration Number: 100000 Status: **Not registered** Last Registration:

You're currently suspended

Residence:	1234 Street, Columbus, OH 43215	Email:	Test@sc.ohio.gov
Employer:	123 Attorney LLC.	Office Phone:	123-456-7890
Office Address:	1234 Street, Columbus, OH 43219	Gender:	M
Date of Admission:	11/06/2006	Date of Birth:	12/10/1980
Race:	Asian	Hispanic/Latino:	No

Sanctions Fee Owed

You have unpaid CLE sanctions. Please click here to pay.

CLE Requirement as an Attorney For Compliance Period: 1/1/2015 - 12/31/2016

CLE Sanction Fees

Period	Disposition	Issued	Sanction Fee	Sanction Due By	Case Number
2009 - 2010	Monetary sanction imposed	12/29/2011	\$550.00	1/30/2012	2011-100000
2011 - 2012	Attorney Suspended and Monetary Sanction imposed	12/13/2013	\$750.00	1/13/2014	2013-100000

Fee Total \$1,300.00

Payment

Check your information
When you are ready to pay your sanction fee(s), please verify that you have entered your billing information in correctly.

Name on Card

* Card Expiration Date
Jan (01)

Credit Card

2015

Card Security Code

Fee Amount \$1,300.00

Cancel Pay

9. Site Navigation

The descriptions below summarize the links contained within the left navigation menu.

Portal

Takes the attorney back to the Home screen.

My information

Edit Contact Information

Takes the attorney to the Edit Info screen.

Register

Allows an attorney to register for the current biennium or an upcoming biennium.

View Registration History

Allows an attorney to view previous registrations and changes in status.

CLE

View / Print Transcript

Allows an attorney to view and print a CLE transcript based on the biennium selection.

View Exemptions

Displays an attorney's CLE exemptions.

View Pending Applications

Displays an attorney's pending CLE applications. Applications will only display if the status is "pending".

Submit / Edit Credits

A link to the Submit and Edit CLE Credit page.

CLE Instructions

A link to the CLE instructions page on the Supreme Court of Ohio's website.

Search Approved CLE Courses

A link to the CLE Activity Search page on the Supreme Court of Ohio's website.

Requests

Exemption Request

A link to download the Continuing Legal Education exemption request form.

Attorney Registration Replacement Card

A link to download the Change of Information and Replacement Card Form.

Good Standing Certificate

A link to download the Request for Certificate of Good Standing Form.

FAQs

Attorney Registration FAQs

A link to the Attorney Registration frequently asked questions page.

Continuing Legal Education FAQs

A link to the Continuing Legal Education frequently asked questions page.

IOLTA Help

A link to the Ohio Legal Assistance Foundation's (OLAF) frequently asked questions page.

Contacts

Attorney Services

A link to the Attorney Services home page on the Supreme Court of Ohio's website.

Supreme Court of Ohio

A link to the Supreme Court of Ohio's home page.