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.

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.
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.

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.
3. Home Screen

3.1. Left Navigation Menu
A menu containing navigational links to all pages of the portal and external link. The menus 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.

<table>
<thead>
<tr>
<th>Current Requirement</th>
<th>Previous Carryover/Deficiency</th>
<th>Adjusted Requirement</th>
<th>Completed</th>
<th>Carryover/Deficiency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ethics</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
<td>1.00</td>
</tr>
<tr>
<td>Professionalism</td>
<td>1.00</td>
<td>0.00</td>
<td>1.00</td>
<td>1.00</td>
</tr>
<tr>
<td>Substance Abuse</td>
<td>0.50</td>
<td>0.00</td>
<td>0.50</td>
<td>0.50</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>24.00</strong></td>
<td><strong>4.25</strong></td>
<td><strong>19.75</strong></td>
<td><strong>23.50</strong></td>
</tr>
</tbody>
</table>

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.

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.
5.2. **Attorney Registration**

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

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.
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)).
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

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.
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.
Sanctions Fee Owed
You have unpaid CLE sanctions. Please click here to 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.