Submitting Applications for CLE Accreditation through the Sponsor Portal

Overview

The Sponsor Portal has been updated to allow sponsors to apply for CLE accreditation online through the Sponsor Portal. This functionality allows sponsors to apply for accreditation for all CLE activity types using a single online form. The online submission will replace all current paper forms and will serve as the sole avenue for sponsors to submit applications for accreditation.

A few changes will go into effective with the online application process.

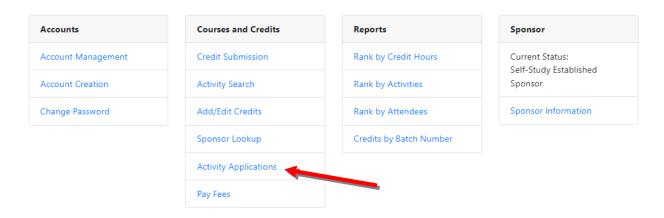
- All applications must be submitted through the Sponsor Portal. Paper applications or PDF applications sent by email will no longer be accepted.
- If an activity has various dates and/or formats, if applicable, an application fee will be assessed for each activity.
- If a fee is applicable, payment must be made to submit the application. Payments can be made by Credit/Debit Card, ACH, or if an Ohio state agency, by Intra-State Transfer Voucher.
- If an answer to a question does not comply with the requirements for accreditation, you may be prevented from submitting the application. For example, if you disclose that confidential information will be discussed, you will receive a message that the rule prevents accreditation, and the application cannot be submitted.
- An Application ID will be created for each application. Upon submission of the application an
 activity code number will be assigned.

Screens and functionality covered within this documentation include:

- 1) Accessing the Activity Applications section in Sponsor Portal
- 2) Reviewing the Activity Application List screen
- 3) Starting a new application
- 4) Completing each of the following screens:
 - a. Activity Information
 - b. Application Questions
 - c. Document Uploads
 - d. Payment
- 5) Opening an existing application
- 6) Editing unsubmitted vs submitted applications
- 7) Reviewing system-generated emails

Accessing the Activity Applications Section in Sponsor Portal

- I) Sponsors will access the Sponsor Portal by entering their username and password at the following URL: https://supremecourt.ohio.gov/sponsorportal/
- 2) On the Home screen, select the 'Activity Applications' link from the **Courses and Credits** section.



3) The Activity Applications screen opens.

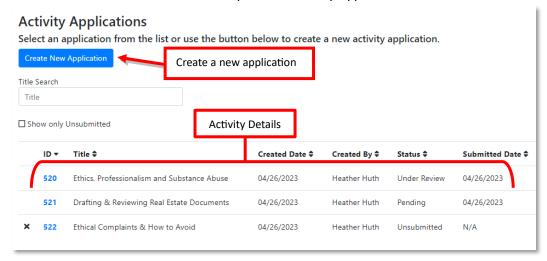
Reviewing the Activity Applications Screen

The Activity Applications screen houses all applications created by a sponsor. This includes applications created by any contact for that sponsor.

Functionality available on this screen:

- 1) Create New Application: Click this button to begin a new application.
- 2) **Title Search:** Populate this field to search for application titles previously created for a sponsor.
- 3) **Show only Unsubmitted (checkbox):** Check this box to limit the application list to unsubmitted applications. This option narrows the list to incomplete forms yet to be submitted.
- 4) **Application ID:** Click the application number in the ID column to open an existing application.
- 5) **Delete:** Click the X next to the Application ID to delete an unsubmitted application. **Note:** Once an application has been submitted, it is no longer eligible for deletion.

See the screenshot below for an example of the Activity Applications screen.

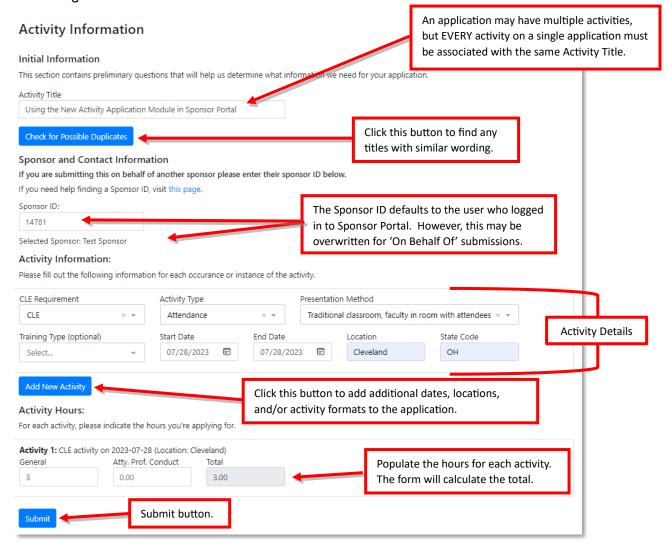


Starting a New Application

- I) From the Activity Applications screen, click the [Create New Application] button at the top of the screen.
- 2) The application guides the user through four screens required for submission. This section serves as a guide for each of the screens. Screen 1: Activity Information
 At the top of this screen (and every subsequent screen), the Navigation Bar shows the sponsor where they are in the application process. Because the completion of each screen is required prior to moving to the next screen, notice that only Application Listing is clickable at this point. Once the sponsor moves through additional screens, other options on the Navigation Bar will become links and allow the sponsor to move back and forth through each of the

Application Listing > **Activity Information** > Application Questions > Document Uploads > Payment screens.

The complete list of this screen's fields and their definitions are listed below. **Note:** Every field, except Training Type, is <u>required</u>. If any fields are left blank, an error message will appear below the [Submit] button to guide the user to the issue.



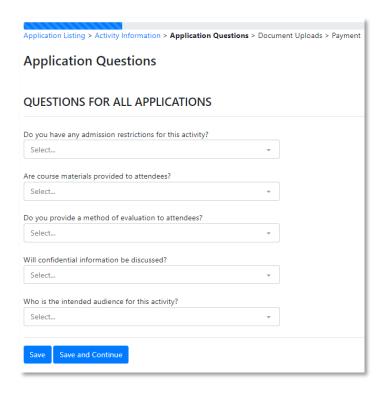
- 1) **Activity Title:** The title for the activity/activities submitted on the application.
- 2) Check for Possible Duplicates: A search feature on the Activity Title field which lists any similarly named activities previously submitted by the sponsor.
- 3) **Sponsor ID:** This field defaults to the submitter's sponsor ID but may be overwritten for 'On Behalf Of' submissions.
- 4) Activity Details:
 - a. **CLE Requirements:** CLE, Judicial (Ohio/National Judicial College Courses Only), New Lawyer Training
 - b. **Activity Type**: Attendance, Self-Study, Pro Bono, Live Interactive Webinar
 - c. **Presentation Method:** The Presentation Method selections are unique to each Activity Type.
 - i. Attendance: Traditional Classroom, Broadcast of Live Presentation, Pre-recorded Presentation
 - ii. Self Study: Telephone Presentation, On Demand, Live Webcast, Webcast Replay
 - iii. Pro Bono: None
 - iv. Live Interactive Webinar: Live Interactive Webinar
 - d. **Training Type:** Law School (ABA Accredited Law School Attendance/Teaching), Substance Abuse Bar Exam Requirement, Mayor's Court Magistrate Training, Precinct Election Official Training
 - e. Start/End Date: Dates of activity
 - f. Location: City where activity takes place (does not appear for Self-Study activities)
 - g. State: State where activity takes place (does not appear for Self-Study activities)
- 5) Add New Activity: This button adds a new set of Activity Detail fields for additional activities.
- 6) Activity Hours: The sponsor provides the hours applied for each activity listed.
- 7) **Submit:** This button allows the sponsor to move to the next screen once all information has been provided.

As indicated above, an error message appears if the [Submit] button is activated when a required field is not populated. Here is an example of an error message on the Activity Information screen.



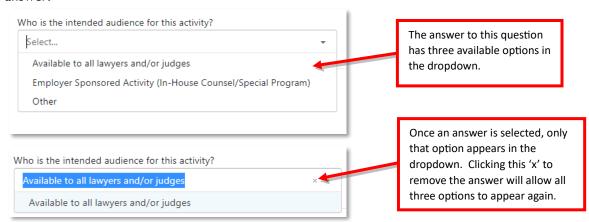
Screen 2: Application Questions

After clicking the [Submit] button, the application moves to the *Application Questions* screen. This page is dynamic, and the question list will vary depending on the selections made on the first screen. Below is an example of an *Application Questions* screen.



Rules for the Application Questions Screen

- 1) Save vs. Save and Continue
 - a. Save: The sponsor should select [Save] when they are not able to complete the form but wish to save all changes before exiting.
 - b. Save and Continue: The sponsor should select [Save and Continue] when they are able to complete all questions and wish to proceed to the next screen.
- 2) Some answer boxes have predetermined options available in a dropdown menu. Sponsors should use the dropdown menu, when available, to select the appropriate answer rather than typing a response. Typing an answer may cause the application to detect an error on the form.
- 3) When initially clicking on the dropdown arrow in an answer box, the form shows all available options. However, once a selection is made, only that answer appears in the dropdown. To return to the complete list of options, the sponsor must click on the 'x' to remove the selected answer.



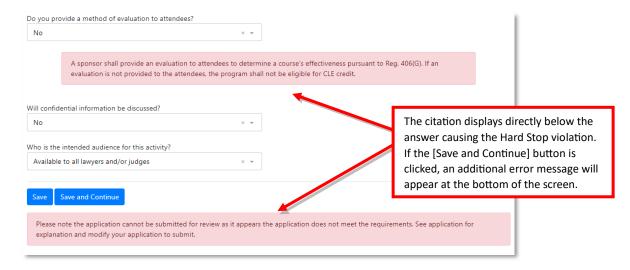
4) Every question is <u>required</u>. If a question is left blank, an error message will appear below the [Save and Complete] button and the unanswered question will be highlighted with a red box around the missing answer.



5) Some questions have sub-questions that appear based on specific answers. If a sub-question appears after the answer to the main question is provided, that sub-question is also required and may not be left blank.

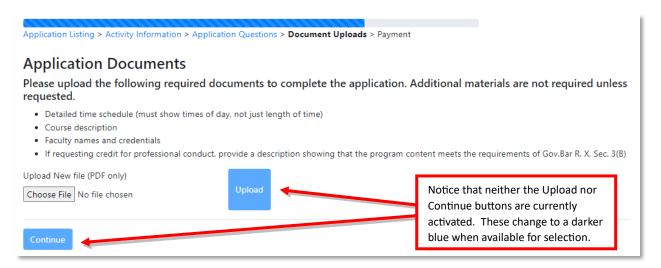


- 6) Some questions serve as 'Hard Stops'. A Hard Stop occurs when a sponsor's response signifies that the activity does not meet the CLE standards. If a Hard Stop is activated:
 - a. A citation will appear in red below the response which triggered the infraction. This will occur immediately after the question is answered.
 - b. If the [Save and Complete] button is subsequently clicked, an error will appear at the bottom of the screen indicating that the sponsor cannot submit the form in its current state.



Screen 3: Application Documents

After clicking the [Save and Continue] button, the application moves to the Application Documents screen. The rules for required documents are listed directly on the screen. Example below.

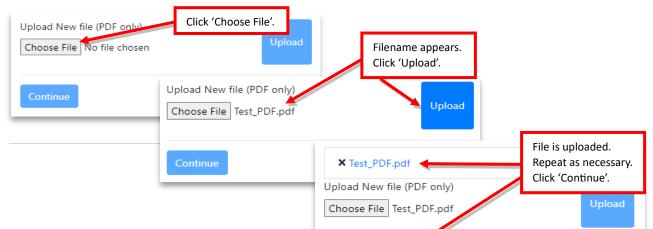


Rules for the Application Documents Screen

- 1) A minimum of one document must be uploaded.
- 2) The Document Upload feature is limited to PDFs only.
- 3) Documents can only be uploaded one at a time.
- 4) While multiple documents are required for approval, the application only requires one document upload in order to move past this screen.
- 5) The 'at least one document' upload requirement allows the sponsor to submit a single combined PDF versus several individual documents. Either option is acceptable.
- 6) The Pro Bono and Precinct Election Official applications do not require accompanying documents and will skip this screen to move directly to the payment screen.

Uploading a Document

- 1) To upload a document, the sponsor will complete the following steps:
 - a. Click [Choose File]
 - b. The file folder will open. Highlight a PDF to upload and click the [Open] button.
 - c. The selected file appears next to the [Choose File] button and the [Upload] button is now activated.
 - d. Click the [Upload] button.
 - e. The file is attached to the application. Other files may be attached following the same process.
 - f. Click the [Continue] button once all documents are added.



Screen 4: Pay and Submit Application

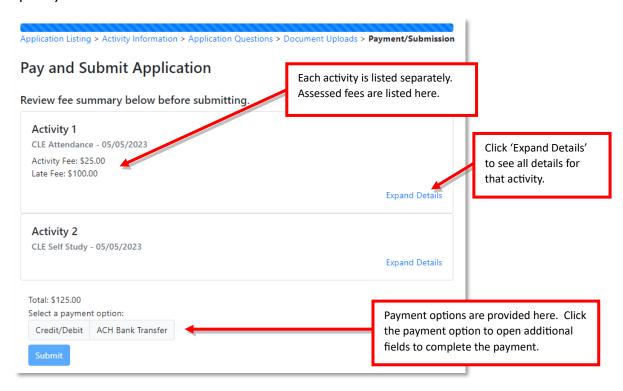
After clicking the [Continue] button, the application moves to the *Pay and Submit Application* screen. This screen varies in appearance based on payment requirements. See the screenshots below for examples of a *Pay and Submit Application* screen versus a *Submit Application* screen.

Pay and Submit Application screen

If a payment is due, the screen comprises the following:

- I) **Review fee summary section**: This section lists each individual activity, defaulting to the basic information of *CLE Requirement*, *Activity Type*, *Date*, and *Fees*. To see a more granular view, the sponsor may click the Expand Details link to view all the Activity Details populated on the initial *Activity Information* screen.
- 2) **Payment section:** This section displays the total fee amount and offers payment options of *Credit/Debit*, ACH Bank Transfer, and Intra-State Transfer Vouchers for Ohio state agencies (ISTV) (if applicable).

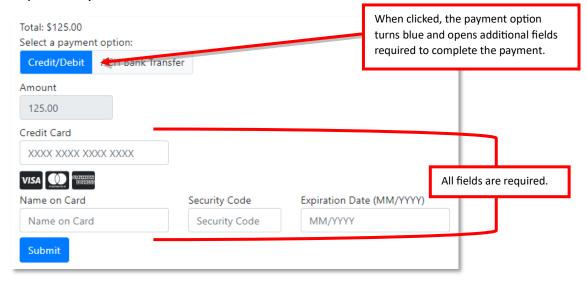
Example Payment screen:



Example 'Expand Details' view:



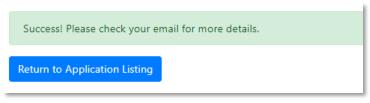
Example Expanded Payment section:



Note: Error messages will appear if information is not entered correctly. One possible error: The sponsor enters the expiration date incorrectly.

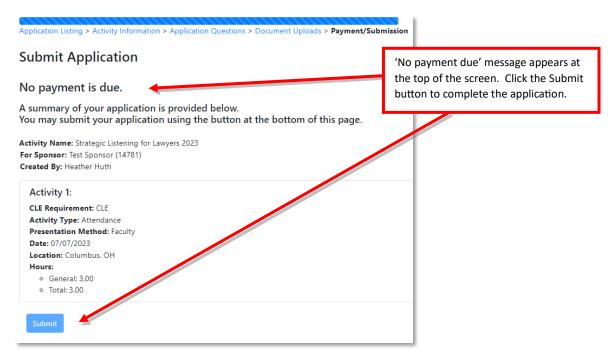


After clicking [Submit], the sponsor received a Success message. Clicking the [Return to Application Listing] button returns the sponsor to the default opening screen (see page 2).



Submit Application screen (no fees)

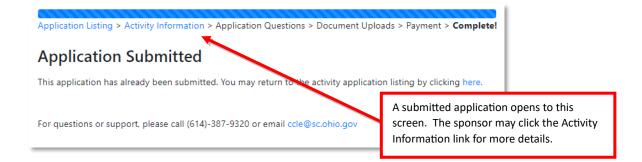
If there are no fees, the screen indicates that no payment is due and provides the activity details. To complete the application, the sponsor only needs to click the [Submit] button.



Opening an Existing Application

Back on the Activity Applications screen, a sponsor may open any existing application.

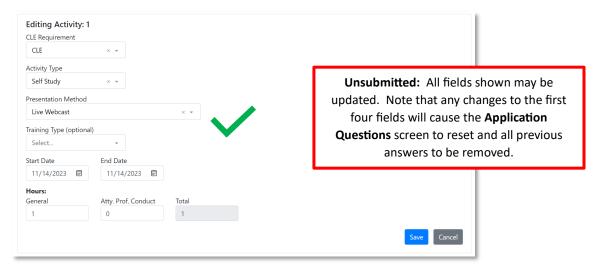
- 1) Click on the Application ID hyperlink.
- 2) Which screen the application opens to will depend on the status of the application.
 - a. **Unsubmitted applications:** The application opens to the last screen updated. (Example: The Application Questions screen opens if the sponsor clicked [Save] versus [Save and Continue] on this screen.)
 - b. **Submitted applications:** The application opens to an *Application Submitted* screen. The Navigation Bar shows that the application is 'Complete' and the screen displays a message stating the application has already been submitted. The sponsor may click the link to the *Activity Information* screen after submission.



Editing Unsubmitted vs Submitted Applications

The application status dictates which and how many fields can be edited. To edit an application, follow the previous instructions for **Opening an Existing Application** and click the Activity Information link in the Navigation Bar (shown above). The next three screenshots show which fields are editable on an existing activity when the application is *Unsubmitted*, *Submitted-Pending Review*, or *Submitted-Under Review*.

Application I: Unsubmitted



Application 2: Pending

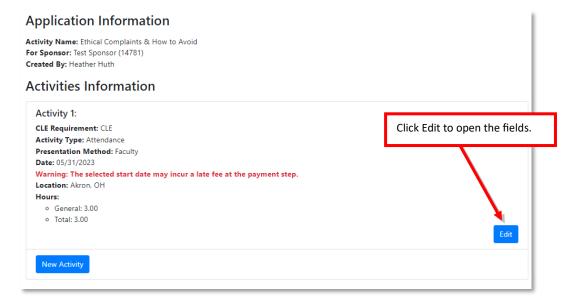


Application 3: Under Review

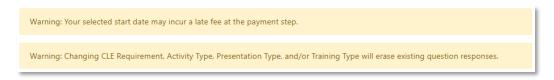


Editing an Existing Activity

- 1) If an activity is editable, an [Edit] button appears to the right of the activity to be updated.
- 2) Click the Edit button.
- 3) Change the information as needed. Note: Changing the CLE Requirement, Activity Type, Presentation Method, or Training Type will erase any previously answered questions. A warning message is displayed in this scenario.
- 4) Click the [Save] button to save the changes.



Example of Warnings that may appear when editing:



Rules for Editing an Existing Activity

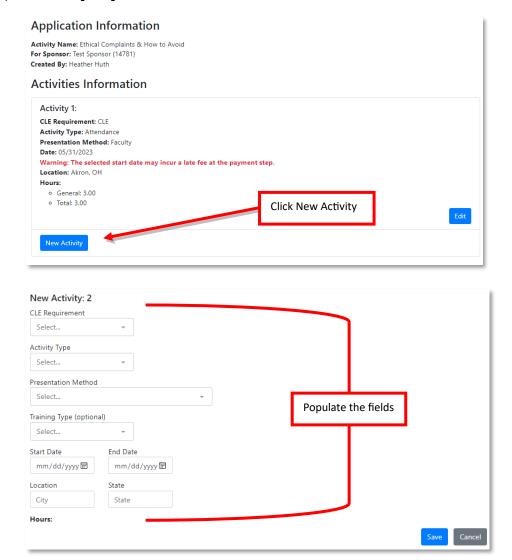
- 1) The status of the application affects which fields may be edited. Examples were provided above.
- 2) Changing the CLE Requirement, Activity Type, Presentation Method, or Training Type will erase any previously answered questions.

- 3) If an application is Submitted-Pending (i.e. has already been paid), the dates cannot be changed to a date that would incur a late fee. Once payment has been completed, the application is not able to create a new payment screen for the late fee. This scenario must be handled outside of Sponsor Portal by submitting an email to ccle@sc.ohio.gov indicating what changes need to be made to the application.
- 4) Edits to Submitted-Pending applications update automatically in CLEAR. There is no need to inform assigned personnel of any changes to the application.

Adding a New Activity

If the application has not been submitted, the sponsor may add additional activities to an application. This functionality also exists on the *Activity Information* screen.

- 1) Click the [New Activity] button.
- 2) A new set of Activity Detail fields appears.
- 3) Populate the fields. (The same rules apply here as they did on the initial Activity Information screen: All fields except Training Type are required.)
- 4) Click the [Save] button.



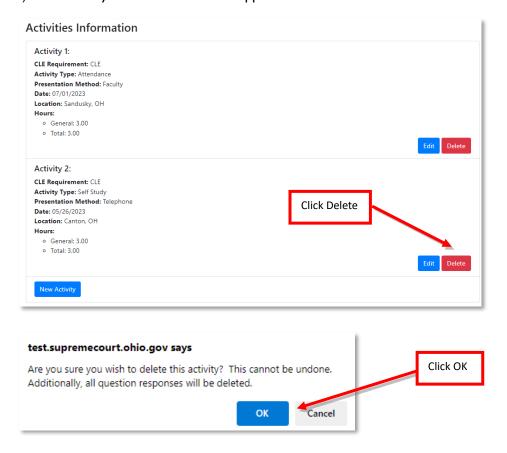
Rules for Adding a New Activity

- 1) A new activity may only be added to an Unsubmitted application.
- 2) Adding a new activity will erase all existing question responses.
- 3) As indicated previously, the new activity will have the same title as the existing activity. If the new activity is for a separate course/function, a new application must be created.

Deleting an Activity

Similar to adding a new activity, deleting an activity can only be performed before an application is submitted. A [Delete] button appears next to the [Edit] button on an application that has multiple activities.

- 1) Click the [Delete] button next to the activity to be deleted.
- 2) A warning message appears. Click [OK] to complete the deletion.
- 3) The activity is removed from the application.



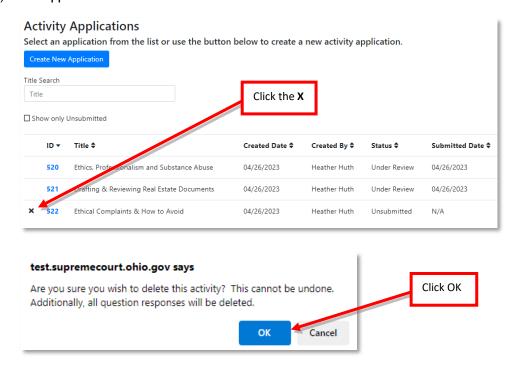
Rules for Deleting an Activity

- 1) An activity may only be deleted on an Unsubmitted application.
- 2) The [Delete] button only appears on applications with multiple activities. If the sponsor wishes to delete a single activity application, they must delete the entire application (directions in next section).
- 3) There is no way to undo the deletion once the sponsor clicks the [OK] button.

Deleting an Application

An entire application may be deleted if it has not been submitted.

- I) On the Activity Applications screen, locate the application to be deleted. If it is deletable, an 'X' will be provided to the left of the Application ID.
- 2) Click the 'X'.
- 3) A warning message appears. Click [OK] to complete the deletion.
- 4) The application is removed from the list.



Rules for Deleting an Application

- 1) An application may only be deleted if it is Unsubmitted.
- 2) There is no way to undo the deletion once the sponsor clicks the [OK] button.

Cancelling an Already-Submitted Program

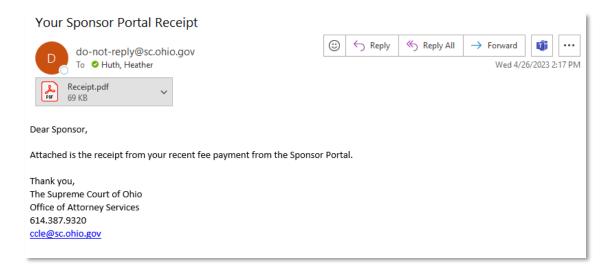
An entire program that has already been submitted can only be cancelled by contacting the Attorney Services Section at 614.387.9320 or ccle@sc.ohio.gov.

System-Generated Emails

The Activity Application section of Sponsor Portal generates two emails.

- 1) An application receipt (with an attached PDF)
- 2) A pending application reminder

Example of an Application Receipt Email:



Example of a Pending Application Reminder Email:

