



BarAlliance

Renewal

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INVOICE PROCESSING

Find Batch

Find Batch allows you to search for batches by their status, All (Non-Verisign), Disbursed, Not Disbursed, Form Year, or Verisign (online transactions).

Column View

Click on the Column View icon ([icon]) to select which columns will be displayed. Your selections will be saved the next time you log in. To change the selections, click on the Column View and change the selections.

Results per Page

To designate the number of results you want displayed on the page, select from the dropdown list next to Results per page.

Renewal Search					Results per page		Not Disbursed	Search	
Batch ID	Entry Date	Batch Amount	Form Year	Address	10		IOLTA	Pro Bono	Disburse
8562	06/22/2005	6340.00	2006		20				
8558	06/21/2005	6872.00	2006		30				
					50				
					100				
					1				

Fig. rm1

Search

To search for a batch, you can enter the Batch ID number or the renewal Form Year into the textbox on the right side of the screen, then click on the Search button.

For example, to search for batch number 8563, you could enter the number 8563 in the textbox, select Batch ID from the dropdown list and click on the Search button.

Renewal Search					Results per page	8563	All (Non-Verisign)	Search
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Fig. rm2

RENEWAL

The general batch information will be displayed.

Renewal Search		Results per page		10		8563		All (Non-Verisign)		Search	
Batch ID	Entry Date	Batch Amount	Form Year	Address	Profile	IOLTA	Pro Bono	Disburse			
8563	06/23/2005	1880.00	2006								✓
1											

Fig. rm3

To view the **Address, Profile, IOLTA, Pro Bono** details of the batch or to **Disburse** the batch, click on the space below the column title. If there is a ✓, that part of the batch has been completed. As shown in the figure above, batch 8563 has already been disbursed.

Address

The Address page allows you to review and edit the address and contact information for members within a renewal batch per the member's renewal form.

Batch ID: 8563 1/10

All [Navigation Buttons]

Control ID: 147433 Reviewed

Member ID: 05018 Date Reviewed:

Member Name: Hewitt, DANIEL Reviewed By:

Include In Non-Mandatory Bar Mailings?

Business Edit

Copy Personal Info

Firm: Mel S Martin, Pc Country: United States of America

Attn: Preferred Mailing Address?

Street 1: 9999 S Commerce Dr # D-999 Phone: (999) 999 - 9999 Ext:

Street 2: Fax: (999) 999 - 9999

Zip: 84107 - Email:

City: Murray Public?

State: Utah Effective: Apr / 28 / 2005

Clear

Personal Edit

P.O. Box Edit

Fig. rm4

The first section displays that you are in Batch 8563, Control 1 of 10, as shown below.

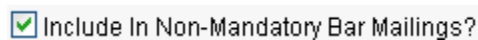


The screenshot shows a control record interface. At the top, it displays "Batch ID: 8563 1/10" and a dropdown menu set to "All". To the right of the dropdown are navigation buttons: a left arrow, a right arrow, and a "#". Below this, the record details are shown: "Control ID: 147433", "Member ID: 05018", and "Member Name: Hewitt, DANIEL". On the right side, there is a "Reviewed" button, and below it, the fields "Date Reviewed:" and "Reviewed By:" are visible.

Fig. rm5

Use the arrow buttons to navigate through the controls in the batch or click on the # button to navigate to a specific control number. You can also choose to view **All** control records in the batch, or only the ones that have been **Reviewed** or **Not Reviewed**.

If a member has elected to be included in Non-Mandatory Bar Mailings on their renewal form, check the box as shown below.



The screenshot shows a single checkbox with the label "Include In Non-Mandatory Bar Mailings?". The checkbox is checked, indicated by a small green square with a white checkmark.

Fig. rm6

If a member has changed an address on their renewal form you can reflect that change here. For example, if the member has changed their **Business** address, check the box labeled **Edit** next to **Business** as shown below.



The screenshot shows a dropdown menu with "Business" selected. To the right of the dropdown is a checkbox labeled "Edit", which is checked.

Fig. rm7

You will then be able to edit the member's business address. If you want to replace the current address with the member's personal address, click on the **Copy Personal Info** button.

Another option is to clear the entire business address and enter new information. To clear the section, click on the **Clear** button.

Once you have finished with the member's record, click the **Reviewed** button at the top of the page to save your changes. The **Date Reviewed** will be entered into the database as well as whom the record was **Reviewed By**.

Disburse

The Disburse page allows you to disburse the money for the member's renewal items.

Member Type / Status	
Member Type: Attorney	CLE Cycle: 2005
Status: Active	Cycle Status: Complete
License Cycle: 2006	Total Amount: \$ 380.00
	Amount Paid: \$ 380.00

Sections	<input type="checkbox"/> Administrative Practice	\$ 15.00	Mandatory Fees:	
	<input type="checkbox"/> Alternative Dispute Resolution	\$ 25.00	Client Security Fund	\$ 5.00
	<input type="checkbox"/> Antitrust/Unfair Competition	\$ 25.00	Renewal Fee For "Active Attorney"	\$ 350.00
	<input type="checkbox"/> Appellate Practice	\$ 10.00	Contributions:	
	<input type="checkbox"/> Banking And Finance	\$ 10.00	Disability Law Center	\$ 0.00
	<input type="checkbox"/> Bankruptcy	\$ 5.00	DNA Legal Services	\$ 0.00
	<input type="checkbox"/> Business Law	\$ 15.00	Legal Aid Society	\$ 0.00
	<input type="checkbox"/> Collection Law	\$ 10.00	Utah Bar Foundation	\$ 0.00
	<input type="checkbox"/> Constitutional Law	\$ 20.00	Utah Legal Services	\$ 0.00
	<input type="checkbox"/> Construction Law	\$ 15.00	Late/Reinstatement Fees:	
	<input checked="" type="checkbox"/> Corporate Counsel	\$ 10.00	<input type="checkbox"/> Postmarked after 7/31/05	\$50.00
	<input type="checkbox"/> Criminal Law	\$ 10.00	<input type="checkbox"/> Postmarked after 8/31/05	\$100.00
	<input type="checkbox"/> Cyberlaw	\$ 20.00	Misc. Fees:	
	<input type="checkbox"/> Education Law	\$ 15.00	x <input type="text"/>	\$ 0.00
	<input type="checkbox"/> Environmental Law	\$ 25.00		
	<input type="checkbox"/> Family Law	\$ 30.00		
	<input type="checkbox"/> Franchise Law	\$ 15.00		
	<input type="checkbox"/> Government Law	\$ 20.00		
	<input type="checkbox"/> Intellectual Property	\$ 30.00		
	<input type="checkbox"/> International Law	\$ 20.00		
	<input checked="" type="checkbox"/> Labor And Employment	\$ 15.00		
	<input type="checkbox"/> Litigation	\$ 25.00		
	<input type="checkbox"/> Military Law	\$ 20.00		
	<input type="checkbox"/> Non-Profit/Charitable Law	\$ 20.00		
	<input type="checkbox"/> Probate / Estate Planning	\$ 20.00		
	<input type="checkbox"/> Real Property	\$ 10.00		
	<input type="checkbox"/> Securities	\$ 40.00		
	<input type="checkbox"/> Senior Lawyers	\$ 25.00		
	<input type="checkbox"/> Solo Sm Firm Rur Pr	\$ 15.00		
	<input type="checkbox"/> Tax	\$ 25.00		
	<input type="checkbox"/> Young Lawyers	\$ 0.00		
Other County Bars	<input type="checkbox"/> Central Utah Bar	\$ 20.00		
	<input type="checkbox"/> Davis County Bar	\$ 22.00		
	<input type="checkbox"/> Park City Bar	\$ 25.00		
	<input type="checkbox"/> Salt Lake County Bar	\$ 40.00		
	<input type="checkbox"/> Southern Utah Bar	\$ 25.00		
	<input type="checkbox"/> Weber County Bar	\$ 25.00		
Associations	<input type="checkbox"/> Hellenic Bar	\$ 25.00		
	<input type="checkbox"/> Minority Bar	\$ 35.00		
	<input type="checkbox"/> Minority Bar Under 3	\$ 25.00		
	<input type="checkbox"/> Women Lawyers	\$ 40.00		
	<input type="checkbox"/> Young Women Lawyers	\$ 30.00		

Fig. rm8

If the **Amount Paid** and the **Total Amount** equal each other, the record is in balance and will be shown in green. If it is out of balance, the **Total Amount** will be shown in red.

Once you have finished with the member's record, click the **Reviewed** button at the top of the page to save your changes. The **Date Reviewed** will be entered into the database as well as whom the record was **Reviewed By**.

IOLTA

The IOLTA page allows the member's answers to the IOLTA section of the renewal form to be entered.

The screenshot displays a web interface for IOLTA form processing. At the top, a grey header bar shows 'Batch ID: 8562 2/20' and a dropdown menu set to 'All' with navigation buttons. Below this is a summary box containing: 'Control ID: 147413', 'Member ID: 03872', 'Member Name: MALOY,' and a 'Reviewed' button. To the right of the summary box are labels for 'Date Reviewed:' and 'Reviewed By:'. Below the summary box is an 'IOLTA Form Selection:' dropdown menu. The main area contains a form with the following fields: 'Attorney Name: A. MALOY', 'Bar No.: 04364', 'Firm: JANET LEWIS, LAWYERS TRUST ACCT', 'Trust Account Name: JANET LEWIS, LAWYERS TRUST ACCT', 'Financial Institution: U S BANK', 'Trust Account No.: 999999999999', 'Firm Contact Name: LEWIS, JANET', and 'Telephone Number: (999)999-9999'. Below the form are 'Delete' and 'Add Another Trust Account' buttons.

Fig. rm9

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Section I of the IOLTA Form is displayed by default, but you can select other IOLTA status forms from the dropdown list as shown below in Fig. rm10.

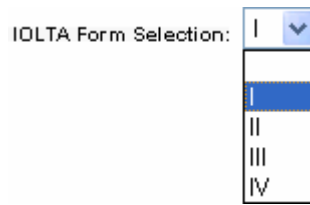


Fig. rm10

Pro Bono

The Pro Bono page allows you to enter the member's responses from their renewal form regarding Pro Bono activities.

I have personally provided hours of pro bono legal services during the past reporting year.

I have contributed \$. (Only contributions to organizations which provide direct services as defined in section (b) of URPC 6.1 should be reported.)

I am willing to accept pro bono referral from the bar in the following practice areas:

<input type="checkbox"/> Administrative Law	<input type="checkbox"/> Appellate
<input type="checkbox"/> Bankruptcy	<input type="checkbox"/> Business Law
<input type="checkbox"/> Civil Rights	<input type="checkbox"/> Collections
<input type="checkbox"/> Commercial Law	<input type="checkbox"/> Construction
<input type="checkbox"/> Consumer	<input type="checkbox"/> Contracts
<input type="checkbox"/> Criminal Law	<input type="checkbox"/> Divorce
<input type="checkbox"/> Do Not Want To Be Listed	<input type="checkbox"/> Eminent Domain
<input type="checkbox"/> Environmental Law	<input type="checkbox"/> Family Law
<input type="checkbox"/> General Litigation	<input type="checkbox"/> General Practice
<input type="checkbox"/> Immigration	<input type="checkbox"/> Insurance
<input type="checkbox"/> Intellectual Property	<input type="checkbox"/> International Law
<input type="checkbox"/> Juvenile Law	<input type="checkbox"/> Labor & Employment
<input type="checkbox"/> Landlord/Tenant	<input type="checkbox"/> Mining Law
<input type="checkbox"/> Oil & Gas Law	<input type="checkbox"/> Professional Malpractice
<input type="checkbox"/> Personal Injury	<input type="checkbox"/> Securities
<input type="checkbox"/> Real Property	<input type="checkbox"/> Taxation
<input type="checkbox"/> Social Security	<input type="checkbox"/> Water Law
<input type="checkbox"/> Trade Regulation	<input type="checkbox"/> Workers Compensation
<input type="checkbox"/> Wills, Estates & Trust	
<input type="checkbox"/> Other Please specify (delimit specializations with commas):	<input type="text"/>

Fig. rm11

Profile

The Profile page allows the member’s Profile responses to be entered. Items with a red asterisk next to them are required.

Sponsor: <input type="text"/>		<input type="button" value="Add License"/>	
Do you have malpractice insurance in an amount of at least \$100,000? <input type="radio"/> Yes <input type="radio"/> No		License Number: <input type="text"/> * State: <input type="text" value="v"/> Date Admitted: <input type="text" value="v"/> / <input type="text" value="v"/> / <input type="text"/> <input type="button" value="Delete"/>	
Race/Ethnicity <input type="radio"/> African American <input type="radio"/> Amer/Alaskan Native <input type="radio"/> Anglo <input type="radio"/> Asian <input type="radio"/> Asian/Pac Islander <input type="radio"/> Caucasian <input type="radio"/> Hispanic <input type="radio"/> Latino <input type="radio"/> Native Hawaiian or Other <input type="radio"/> Pacific Islander <input type="radio"/> White <input type="radio"/> Other Please specify: <input type="text"/> <input type="checkbox"/> I am interested in being contacted by the Utah Minority Bar Association			
Gender: <input type="radio"/> Male <input type="radio"/> Female			

Fig. rm12

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NON-PAYMENTS

Non-Payments allows you to view and update the status of all members who have not paid their renewal fees. To view members who have not paid for a particular year, enter that year in the textbox labeled **Renewal Year**, hit the Tab button. A list will be displayed at the bottom of the page.

The screenshot shows a web interface for 'Non Payment Suspensions'. At the top, there are filters: 'Renewal Year' set to 2006, 'Did not renew' at 0, 'Suspended' at 0, and 'Inactive' selected in a dropdown. A 'Date Active' field is empty, and an 'Apply To Filter' button is present. Below this, the title 'Non Payment Suspensions' is followed by a 'Member:' field, a 'Status:' dropdown, and a 'Date Active:' field with an 'Apply' button. A 'Previous:' label is also visible. At the bottom of the filter section, 'Results Per Page' is set to 10, 'Filter Count' is 0, and 'Filter' is set to 'All'. The main content area displays 'No Records Found' in red text, with a page number '1' centered below it.

Fig. rm13

Update All

You can update the status of all unpaid members simultaneously by selecting a status from the dropdown list, enter an effective date in the text box labeled **Date Active** and click on the **Apply To Filter** button. See Fig. rm14.

This screenshot shows the same interface as Fig. rm13, but with a status dropdown menu open. The 'Renewal Year' is now 2005, 'Did not renew' is 7693, and 'Suspended' is 7688. The 'Date Active' field is set to 9/15/2005. The dropdown menu lists various status options: Active, Active, Emeritus, Active, Under 3, Active, w/ Probation, Deceased, Disability, Disbarred, Inactive, Inactive, Emeritus, Inactive, Full, Inactive, No Service, Inactive, w/ Probation, Interim Suspension, MCLE Suspension, Not Admitted, Resign w/ Discipline, Resignation, Suspended - Disc., and Suspended - NP.

Fig. rm14

A dialog window will appear prompting you to confirm the status change. As shown in Fig. rm15.

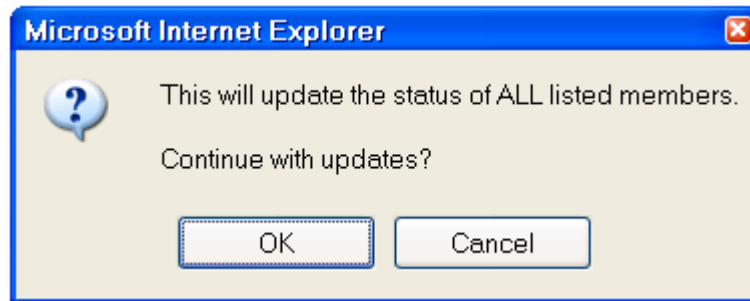


Fig. rm15

Update Individual

You can update the status of individual unpaid members by selecting their name from the list at the bottom of the page, select a status from the dropdown list labeled **Status**, enter an effective date in the textbox labeled **Date Active** and click the **Apply** button. See Fig. rm16.

Non Payment Suspensions

Member: [00004] AAGARD, DAVID T Status: Inactive, Emeritus Date Active: 23/1/2006

Previous: Inactive, Emeritus

Results Per Page: 10 | Filter Count: 7251 | Filter: All

Member ID	Name	Member Type	Status	Date Active
00004	AAGARD, DAVID T	Attorney	Inactive, Emeritus	04/27/2005
05816	ABADIE, LEON W	Attorney	Suspended - NP	09/01/2005
08603	ABARCA, ENRIQUE	Attorney	Suspended - NP	09/01/2005
00007	ABBOTT, CHARLES F	Attorney	Suspended - NP	04/27/2005
06438	ABBOTT, NELSON T	Attorney	Suspended - NP	09/01/2005
09592	ABBOTT, PATRICIA K	Attorney	Suspended - NP	09/15/2005
04994	ABEGGLEN, DIANE	Attorney	Suspended - NP	09/01/2005
08753	ABRAHAM, DIANE L	Attorney	Suspended - NP	09/01/2005
06108	ACEVEDO, DANIEL R	Attorney	Suspended - NP	09/01/2005

Fig. rm16

REPORTS

The **Reports** section allows you to view all reports specific to the Renewal module.

View Report

To view a report, click on the report you want. For example, if you want to view the *Online Renewal Verified Payments - Detail* report, click on that title in the list.

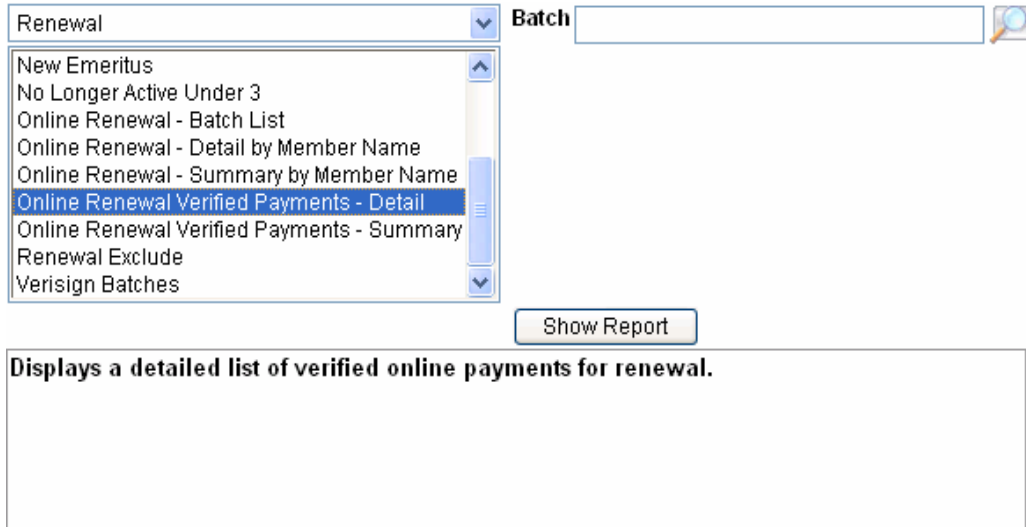


Fig. rm17

A brief description of the report and any parameters that are required to run the report are displayed. If you know that you want to see an audit of batch V20050622, enter V20050622 into the textbox labeled **Batch** and hit the **Enter** key or click on the **Show Report** button.

A dialog will ask if you would like to open or save the file. Click on the Open button to immediately open and view the report.

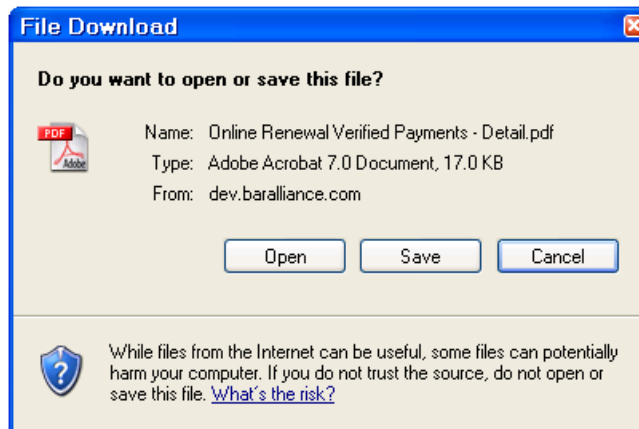


Fig. rm18

The report will be displayed in either a PDF or CSV format.

Utah State Bar

Online Renewal Verified Payments - Detail

Tuesday, September 27, 2005

BATCH: V20050622			\$6,097.00
Member: SCHAFFER, MAUREEN H. 00395	Phone: (999) 999-9999 Ext:	Email: squirrelbate2u@burgoyne.com	
Ctrl: VZVA0A0BF10B	Total: \$90.00	Date: 6/22/2005 1:31:35 PM	
Inactive, Full	\$90.00		
Member: YAGI, MICHAEL N. 02267	Phone: (999) 999-9999 Ext:	Email: nayerhonarvar@pyglaw.com	
Ctrl: VZVA0A0BDA8E	Total: \$80.00	Date: 6/22/2005 1:24:46 PM	
Inactive, No Service	\$80.00		
Member: DONALD J MORGAN, DANE W. 02550	Phone: (999) 999-9999 Ext:	Email: charleen.smith@aol.com	
Ctrl: VZVA0A0B73DD	Total: \$355.00	Date: 6/22/2005 12:45:10 PM	
Client Security Fund	\$5.00		
Active	\$350.00		
Member: MARTINEZ, TIFFANY M. 02627	Phone: (999) 999-9999 Ext:	Email: strost@crwardlaw.com	
Ctrl: VZMA0A0E08C0	Total: \$80.00	Date: 6/22/2005 5:15:42 PM	
Inactive, No Service	\$80.00		

Fig. rm19