Instructions for registered firms to "Join CounselLink Registry"

1. **Areas of Law**:
   - In the **Profiles** area on your CounselLink **Home** page, click on the name of your firm under **OFFICES**
   - Next to **AREAS OF LAW**, click on the **EDIT** button
   - Highlight the area(s) of law on the left, and click on **ADD** to move it to the right (repeat for other areas of law). NOTE: Do not remove **GENERAL**. Areas of law currently used by clients are **INSURANCE DEFENSE, RECOVERY, PRODUCT WARRANTY** and **PRODUCT WARRANTY**
   - Click on **SAVE**

2. **Counties**:
   - Click on the **EDIT** button next to **COUNTIES**
   - Select all counties you handle and click ADD to move counties from left to right box. Click **ADD ALL** if you handle all counties. NOTE: Do not remove **N/A.** the right
   - Click **SAVE**

3. **Join CounselLink Registry**:
   - Go to **INFOCENTER** tab (last tab)at the top of the screen
   - Click the **Join CounselLink Registry** link
   - Click **I AGREE** on disclaimer
   - Click **CONTINUE**
   - Read/Print Out this **ATTORNEY REGISTRY AGREEMENT**
   - Scroll to the bottom of the agreement to "electronically sign" the agreement (enter in the appropriate information in the white boxes) **Note: A partner must be logged in to receive the agreement.
   - Click on **I AGREE**
   - Enter in your **Malpractice Insurance Information** (Please fax us a copy to 916-921-4310)
   - Click **SAVE & CONTINUE**
   - Select at least one private attorney and designate them as a Registry attorney.
   - Click **SAVE & CONTINUE**
   - Enter in the **ATTORNEY Information:** Law School Information, Disciplinary Action, Attorney Licensing
   - Click **SAVE & CONTINUE**

4. **Adding or Changing other Attorneys to Registry**:
   - In the Law Office Profile

     Scroll down to where you see all the individuals listed by name

     1. If the attorneys are already listed in the Office Profile click on their name.
        - Go to the section called Attorney Information and click on the Edit button at the top right of that section.
        - Change Group type in drop down to "**Registry**"

          Complete the following fields:
          - Former Name if they graduated or got their license under a different name (ie. Former or maiden names)
          - Date of Birth is not required but helpful to the Universities
          - Law School name
          - Graduation Month and Year
          - Practice Start Date
          - State(s) of License
          - Agency of License
          - Bar Member Number, if applicable

        - Year admitted
        - Status of License – Active or Inactive
        - Answer disciplinary history questions by clicking on the yes or no box
        - Check the box on the left to attach this attorney to the Malpractice Insurance Policy entered on the Law Firm Profile.
        - Click ‘Save and Continue’
        - The next two pages are optional information to be able to show the client this attorney’s languages and awards if any.

    2. <u>If the attorneys are being added for the first time:</u>
        - Click the **CREATE AN INDIVIDUAL** button (on the right side) to add a timekeeper
            - Note: Click NO to ‘Activate Login?’ if the individual/timekeeper being entered will not need to log into CounselLink
            - Timekeeper Initials can be Alpha or Numeric but MUST match the identifier used in your billing software for this individual
            - In the section labeled ‘Use Address Information’, select the appropriate office
            - Click the ‘Save & Continue’
            - Group Type = Select **REGISTRY**
            - You will need to complete:
                - Former Name if they graduated or got their license under a different name (ie. maiden names)
                - Date of Birth is not required but helpful to the Universities
                - Name of Law School
                - Month and Year of Graduation from Law School
                - Practice State Date
                - State(s) of License
                - Agency of License
                - Bar Member Number if applicable
                - Year admitted
                - Status of License – Active or Inactive
            - Answer Disciplinary questions by selecting Yes or No to questions
            - Check the box on the left to attach this attorney to the Malpractice Insurance Policy entered on the Law Firm Profile.
            - Click ‘Save and Continue’
            - The next two pages are optional information to be able to show the client this attorney’s languages and awards if any.

- Check the box for roles that this individual will need to use in CounselLink. If none, make sure that just practicing attorney is checked.
- Click ‘Save and Continue’

5. **<u>Make Offer</u>:**
    - Last, click on the **FEES** tab at the top of the screen
        - To view **REGISTRY** fee structure, select Group Type Registry and click **SEARCH**
        - Click on the **FEE STRUCTURE ID #** to view
        - Under **STAGE STRUCTURE**, enter level rates for each category (If there is an amount under the MAP column it is an abbreviation for Maximum Allowed Price)
        - Under **COUNTIES**, select all counties that you wish this rate to apply to. **<u>**Do not move N/A to the right box.</u>**
        - Click **Save**
        - Repeat process until rates are entered on all fee structures your firm wishes to make an offer.