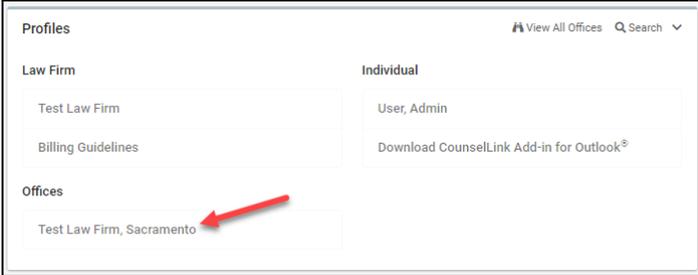


## Completing Diversity Information in CounselLink

Some clients request diversity information be entered into CounselLink on individual timekeepers and/or on the law firm profile. If your client is requesting diversity information be completed, please see the steps below:

### Individual Timekeeper Diversity Information:

1. Click the **Office** name under the Profiles section of the CounselLink Home page



The screenshot shows the 'Profiles' section of the CounselLink Home page. It is divided into 'Law Firm' and 'Individual' categories. Under 'Law Firm', there are links for 'Test Law Firm' and 'Billing Guidelines'. Under 'Individual', there are links for 'User, Admin' and 'Download CounselLink Add-in for Outlook®'. Below these is an 'Offices' section with a link for 'Test Law Firm, Sacramento', which is highlighted with a red arrow.

2. Click the **Name** of the timekeeper from the Office Staff section of the Office Profile page



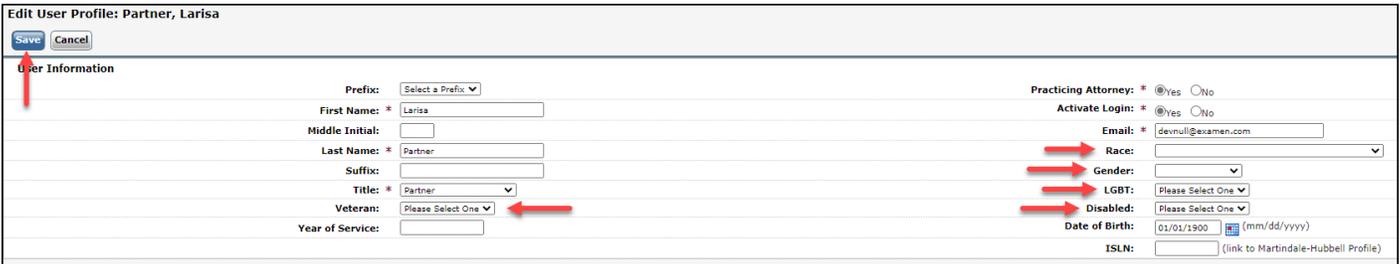
The screenshot shows the 'Office Staff' section of an Office Profile page. It includes buttons for 'Edit Roles', 'Add User', 'Import Timekeepers', and 'Export Timekeepers'. Below these is a table with columns for 'Name' and 'Role(s) in this office'. The first row shows 'Partner, Larisa' in the Name column, which is highlighted with a red arrow. The corresponding role is 'Partner, Practicing Attorney, Budget Contact, Document Administrator, Admin, Matter Change Approval Contact'.

3. Click **Edit**



The screenshot shows the 'Law Firm User Profile: Partner, Larisa' page. It has two sections: 'Law Firm User Profile: Partner, Larisa' and 'Law Firm Individual Profile'. The 'Edit' button in the first section is highlighted with a red box.

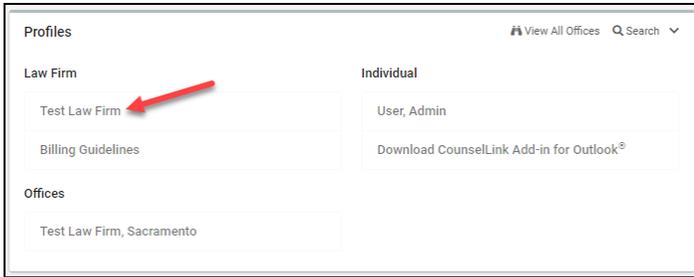
4. Enter or update the timekeeper diversity information fields (Gender, Race, LGBT, Disabled, and/or Veteran)
5. Click **Save**



The screenshot shows the 'Edit User Profile: Partner, Larisa' form. It has a 'Save' button and a 'Cancel' button. The form is divided into 'User Information' and 'Practicing Attorney' sections. The 'User Information' section includes fields for Prefix, First Name, Middle Initial, Last Name, Suffix, Title, Veteran, and Year of Service. The 'Practicing Attorney' section includes fields for Activate Login, Email, Race, Gender, LGBT, Disabled, Date of Birth, and ISLN. Red arrows point to the 'Save' button, the 'Veteran' dropdown, and the 'Race', 'Gender', 'LGBT', and 'Disabled' dropdowns.

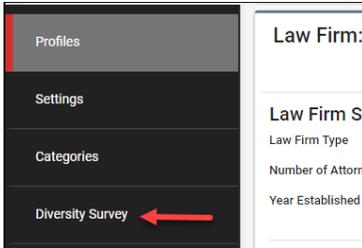
## Law Firm Diversity Survey:

1. Click the **Firm** name under the Profiles section of the CounselLink Home page



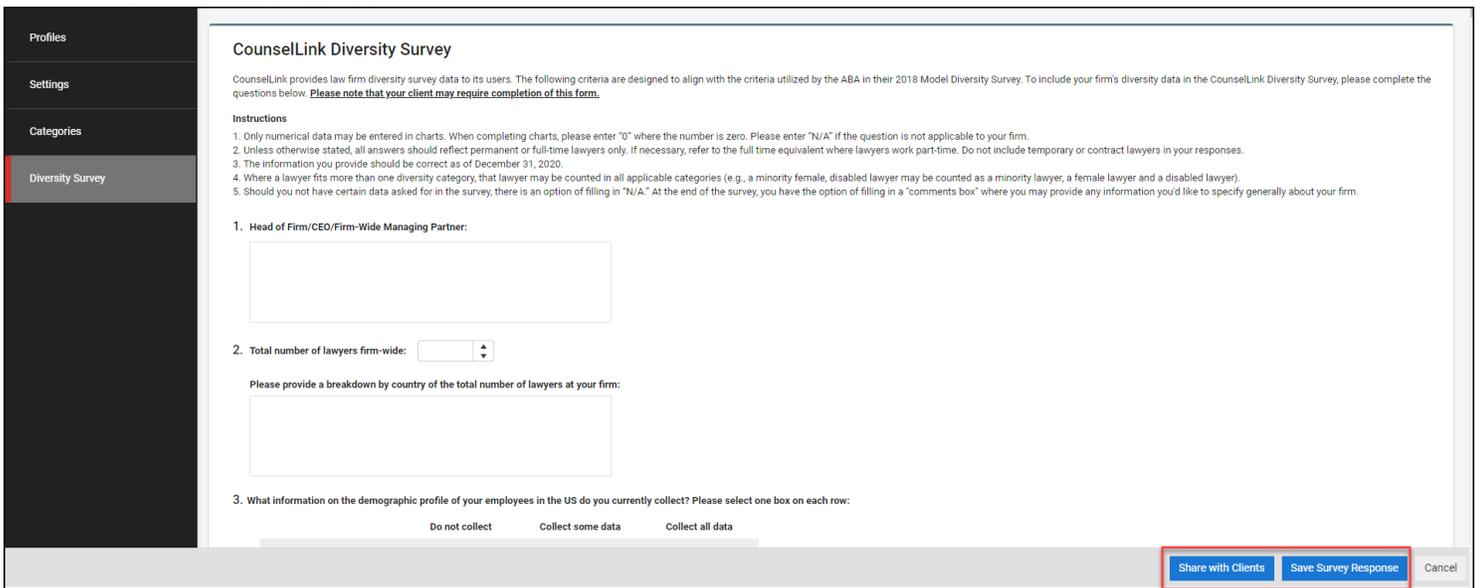
The screenshot shows the 'Profiles' section of the CounselLink Home page. Under the 'Law Firm' heading, there is a list of law firms. A red arrow points to the first entry, 'Test Law Firm'. Other entries include 'Billing Guidelines' and 'Offices' (with 'Test Law Firm, Sacramento' listed below it). The 'Individual' section shows 'User, Admin' and a link to 'Download CounselLink Add-in for Outlook?'. At the top right, there are links for 'View All Offices' and a search bar.

2. Click **Diversity Survey** from the Law Firm Profile page



The screenshot shows the 'Law Firm' profile page. On the left, there is a dark sidebar with navigation options: 'Profiles', 'Settings', 'Categories', and 'Diversity Survey'. A red arrow points to the 'Diversity Survey' option. The main content area shows the 'Law Firm' details, including 'Law Firm Type', 'Number of Attorneys', and 'Year Established'.

3. Complete the questions listed in the Diversity Survey
4. Click **Save Survey Response**
5. Click **Share with Clients**



The screenshot shows the 'CounselLink Diversity Survey' form. The title is 'CounselLink Diversity Survey'. Below the title, there is a paragraph of text explaining the survey's purpose and criteria. The form includes several sections: 'Instructions' with five numbered points, '1. Head of Firm/CEO/Firm-Wide Managing Partner:' with a text input field, '2. Total number of lawyers firm-wide:' with a dropdown menu, and 'Please provide a breakdown by country of the total number of lawyers at your firm:' with a text input field. At the bottom, there is a question about demographic data collection with three radio button options: 'Do not collect', 'Collect some data', and 'Collect all data'. At the bottom right, there are three buttons: 'Share with Clients', 'Save Survey Response', and 'Cancel'. A red box highlights the 'Share with Clients' and 'Save Survey Response' buttons.

6. Select the **Share Diversity Survey** check box to share the diversity survey with the selected client



The screenshot shows the 'Share Survey from 2020' dialog box. It has a search bar at the top with the placeholder text 'enter keywords'. Below the search bar, there is a table with columns for 'Client', 'Client ID', and 'Share Diversity Survey'. The first row shows '(Performance Testing Client)' in the 'Client' column, an empty 'Client ID' field, and a checkbox in the 'Share Diversity Survey' column. A red arrow points to this checkbox.

7. Click **Close**