The State Bar of California
Information Technology

Agency Billing
User Guide

12/13/2016

Agency Billing Application

Step 1

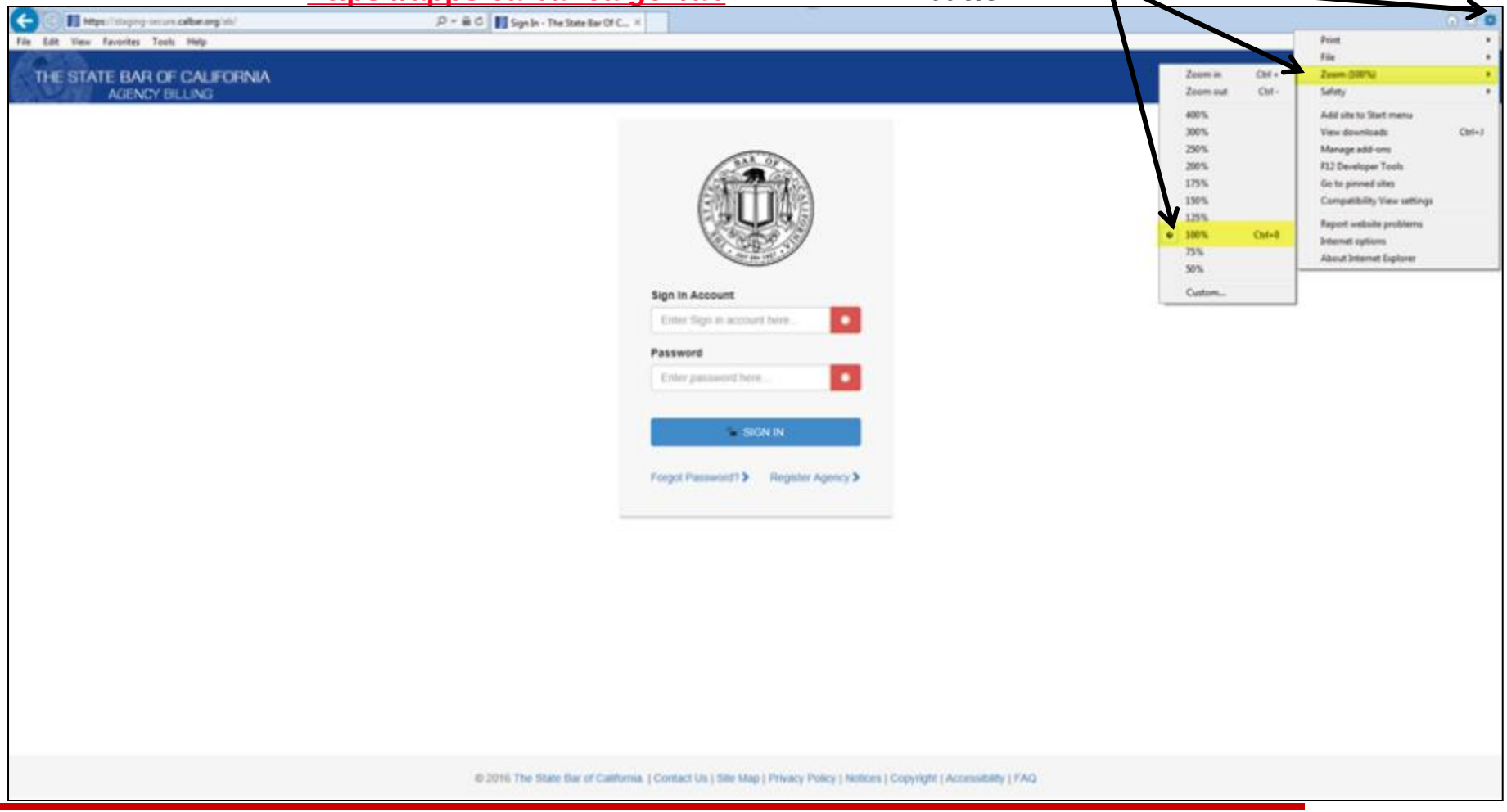
- **1. Navigate http://www.calbar.ca.gov/**
- **2. Click on "Log In" under Agency Billing to launch the Agency Billing application***

* **Or – Navigate directly to the application by going to https://apps.calbar.ca.gov/ab**

Agency Billing Application

Step 1 ctd.

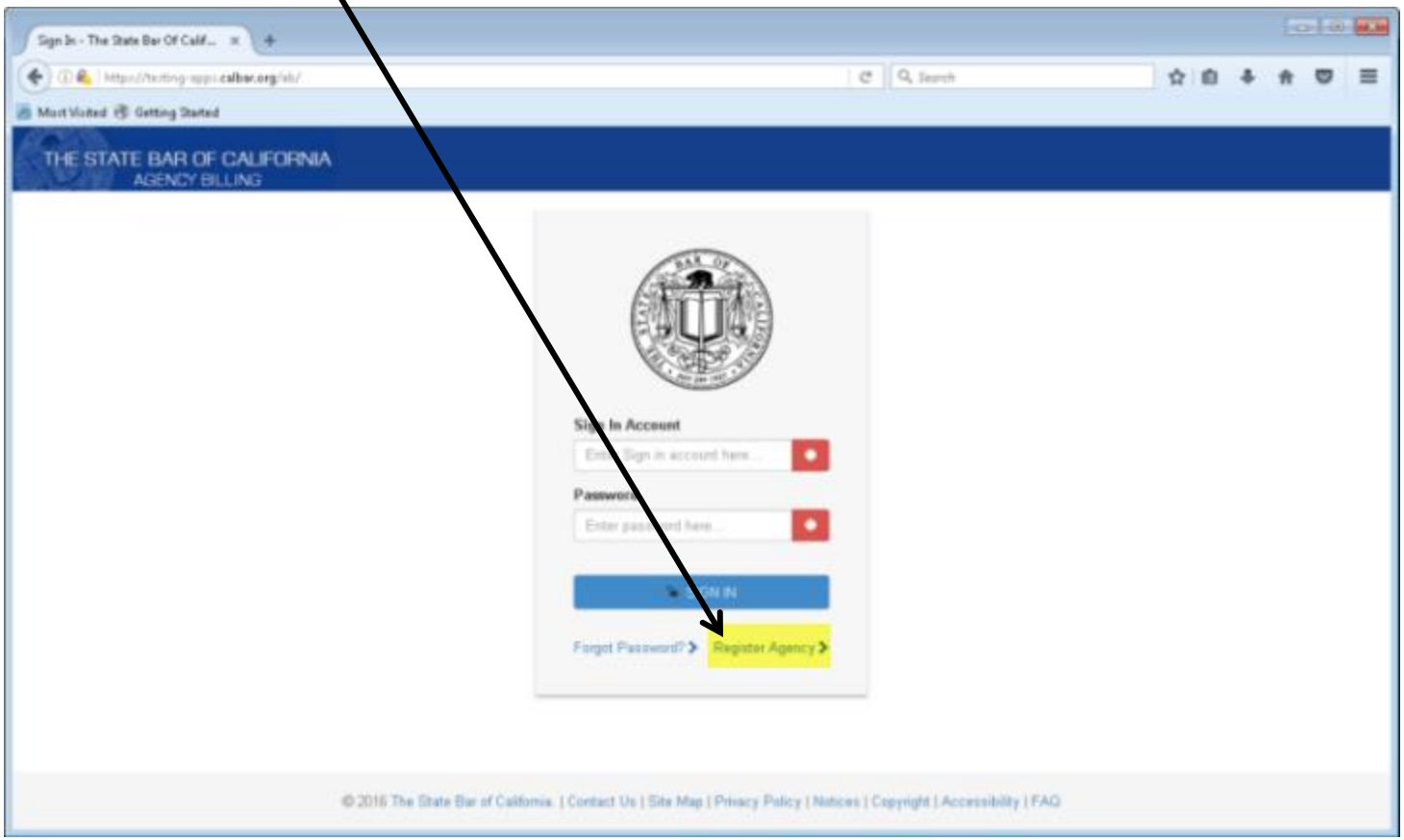
- **1. You will now be at the Agency Billing application: https://apps.calbar.ca.gov/ab**
- **2. Set your screen resolution (Zoom) to 100% or less by clicking the settings button**



Agency Billing Application

Step 2

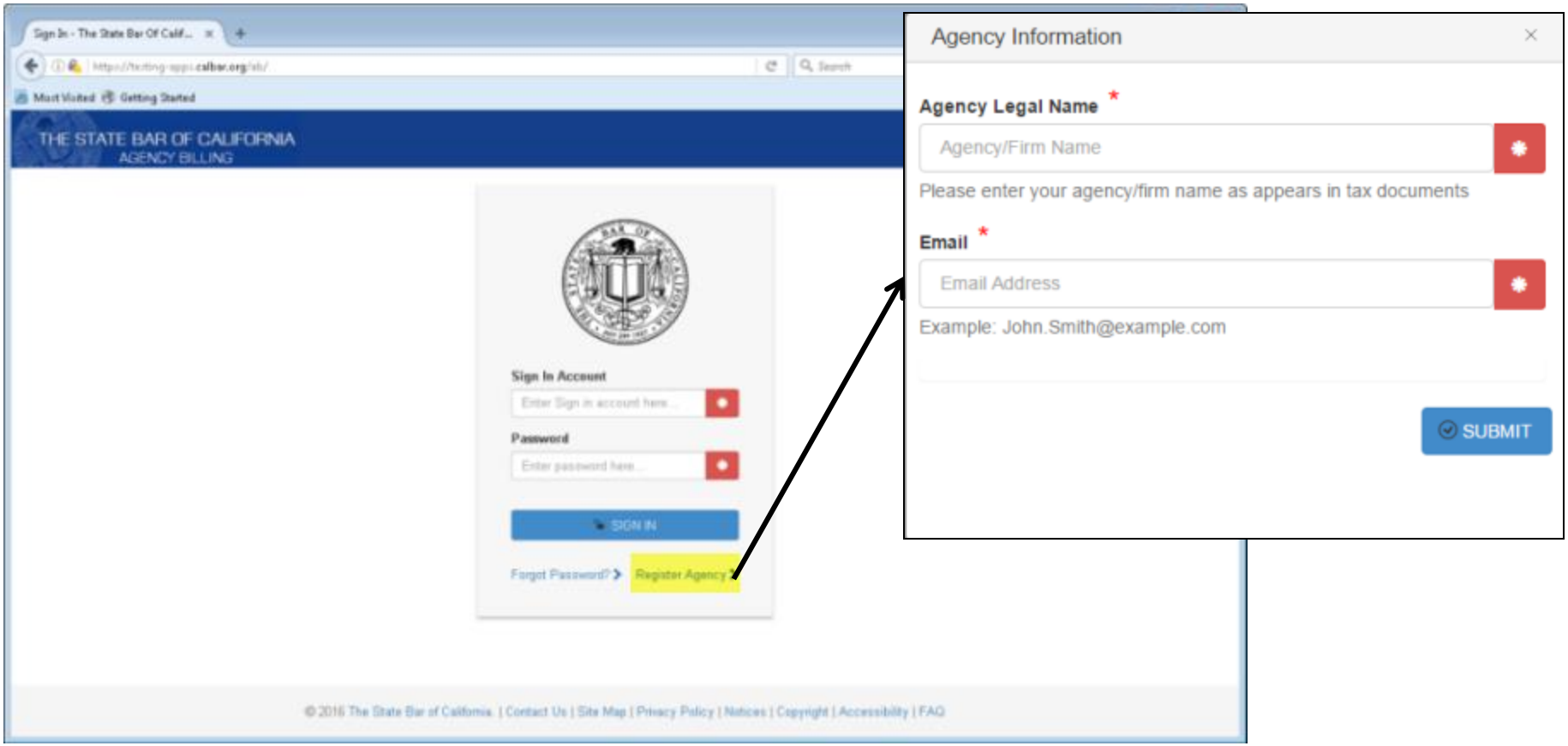
Click on: "Register Agency"



Agency Billing Application – Register Agency

Step 2 ctd.

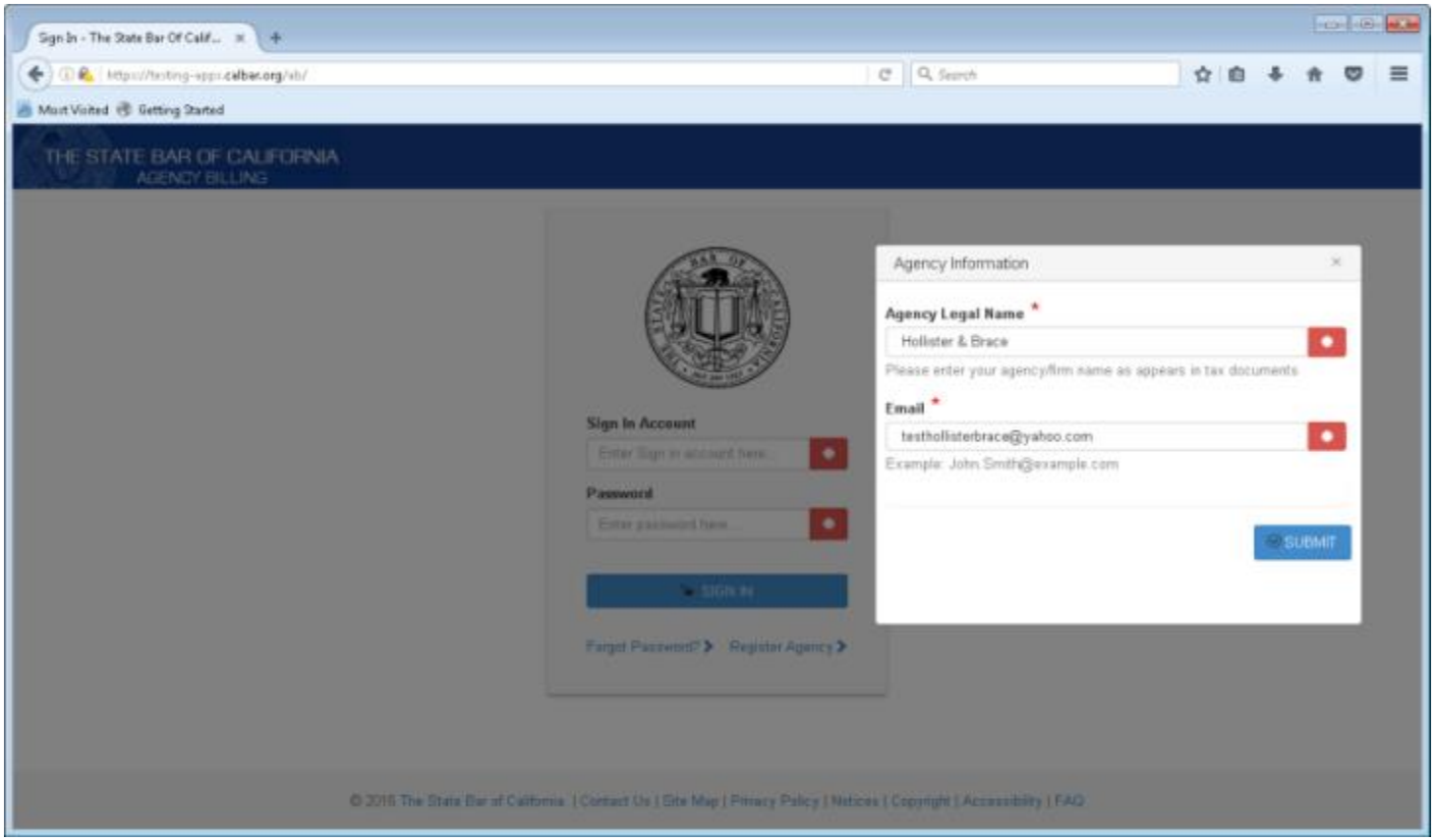
New window "Agency Information" will pop up



Agency Billing Application – Register Agency

Step 3

Enter your "Agency Legal Name" and "Email" address that will be used to receive communications from the Agency Billing Application and click "Submit"



Agency Billing Application – Register Agency

Step 4

Once your "Agency Information" has been entered and you click "Submit", a new window will open for you to enter your "Account Info".

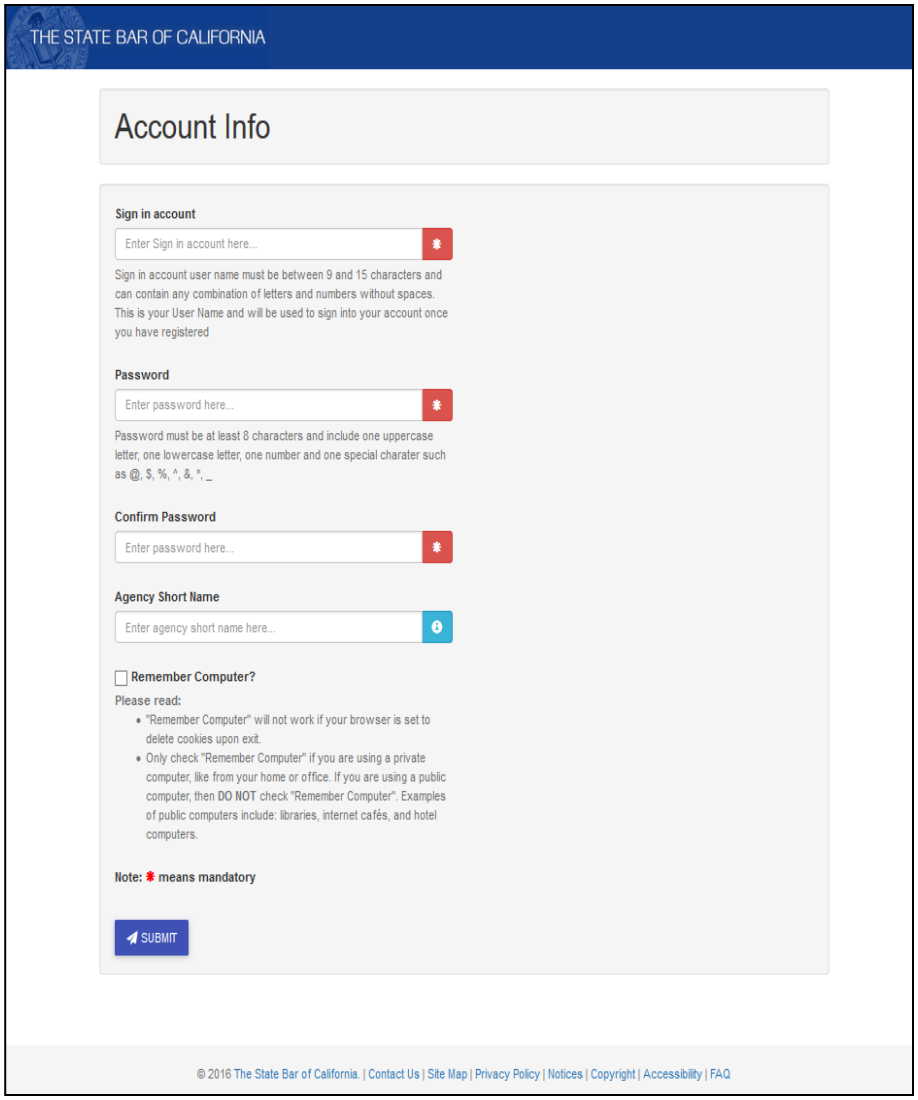
Enter the requested information in the boxes. Anything with an asterisk * is required to go to the next page.

Your "Sign In Account" will be your user name each time you log into the system. Do not use any special characters in your sign in account. Remember to keep your Sign In Account name and password somewhere so you don't forget it.

Your "Agency Short Name" is a set of initials or short name that your account will also be known by.

Click "Remember Computer" when using your office computer to register so the application remembers your information when you attempt to log in. Do not select this box if you are on a public computer.

Once all information has been completed, click "Submit" to be taken to the "Additional Information" page where you will enter the Administrator's information.



Agency Billing Application – Register Agency

Step 5

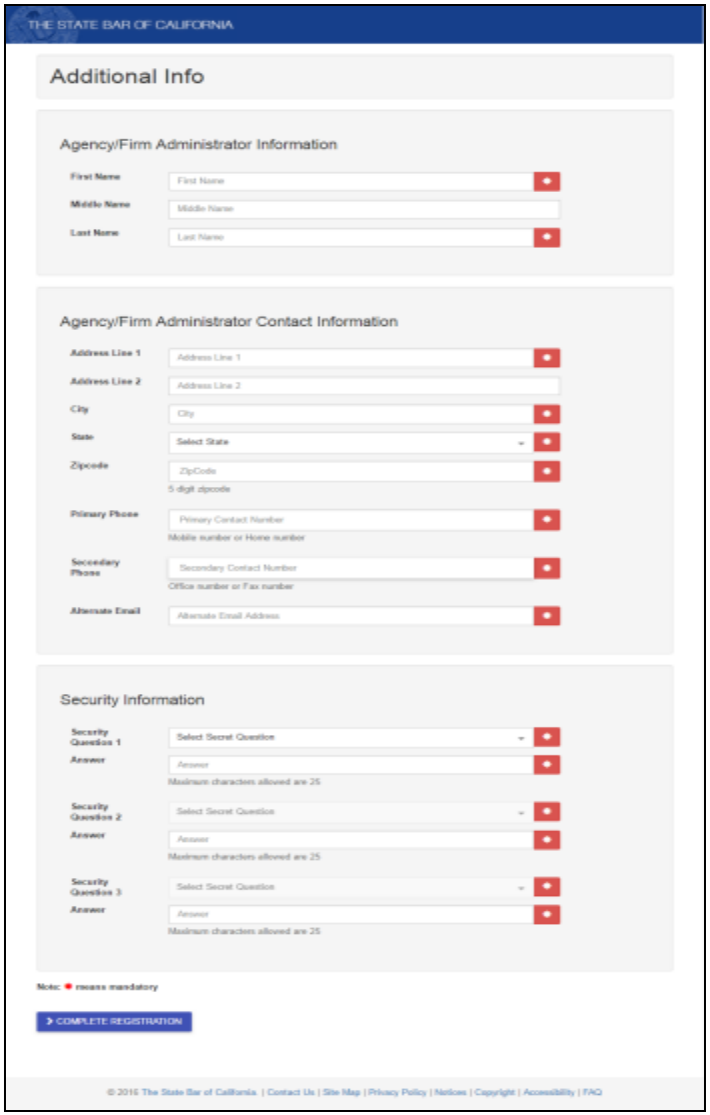
Once your “Account Info” has been completed and you click “Submit”, a new window will open for you to enter your “Additional Information” which is information about the Administrator who will be using the Agency Billing Application to make Member payments for your Agency.

Enter the requested information in the boxes. Anything with an asterisk * is required to go to the next page.

Your “Sign In Account” will be your user name each time you log into the system. Remember to keep your Sign In Account name and password somewhere so you don’t forget it.

Make sure you keep your “Security Information” in a safe place because you will need it if you ever forget your Sign In Account name or password.

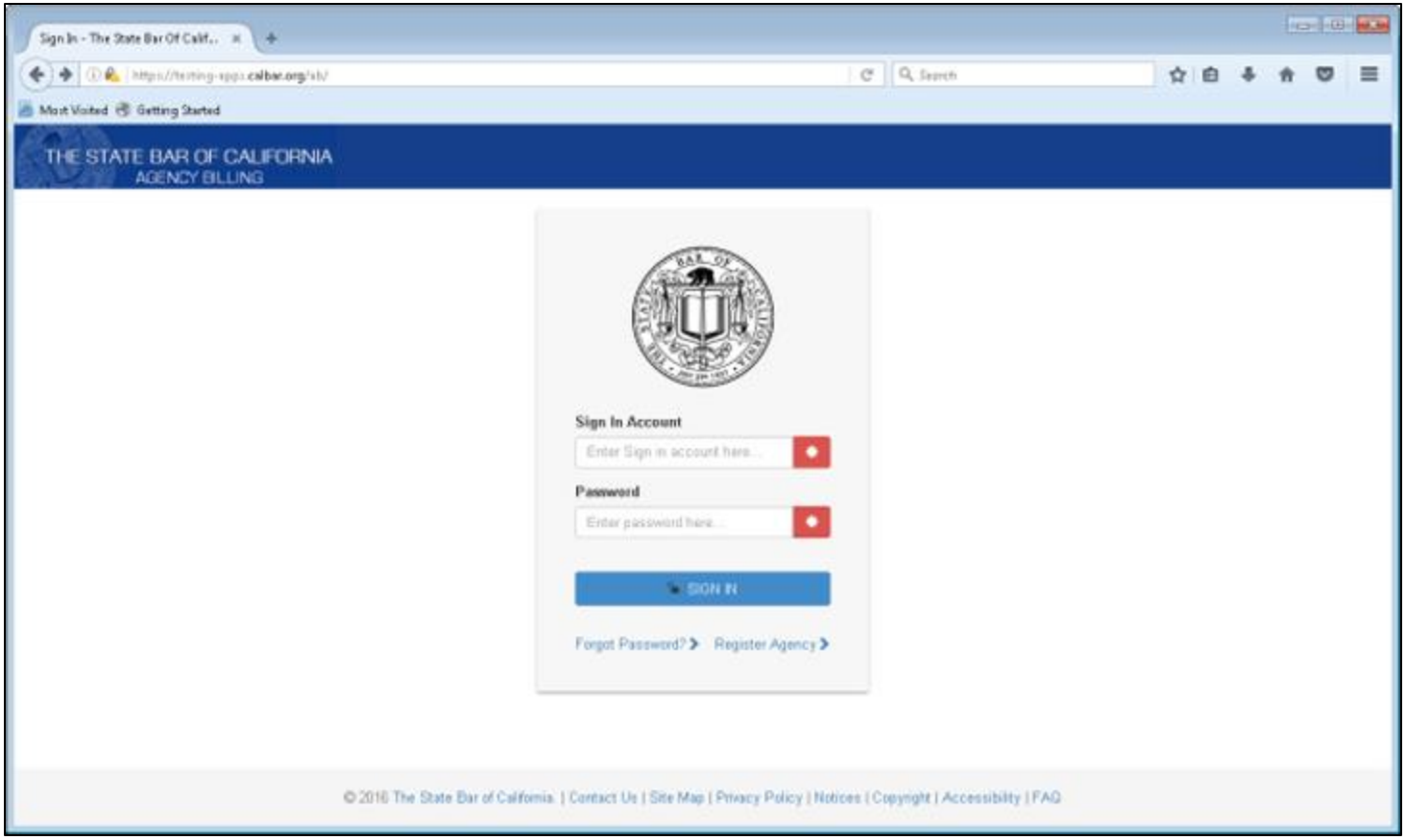
Once all information has been entered, click “Complete Registration”. When you click “Complete Registration”, you will be taken back to the initial log in page to sign into your account. You will also receive a confirmation email confirming your registration was successful.



Agency Billing Application – Sign In

Step 6

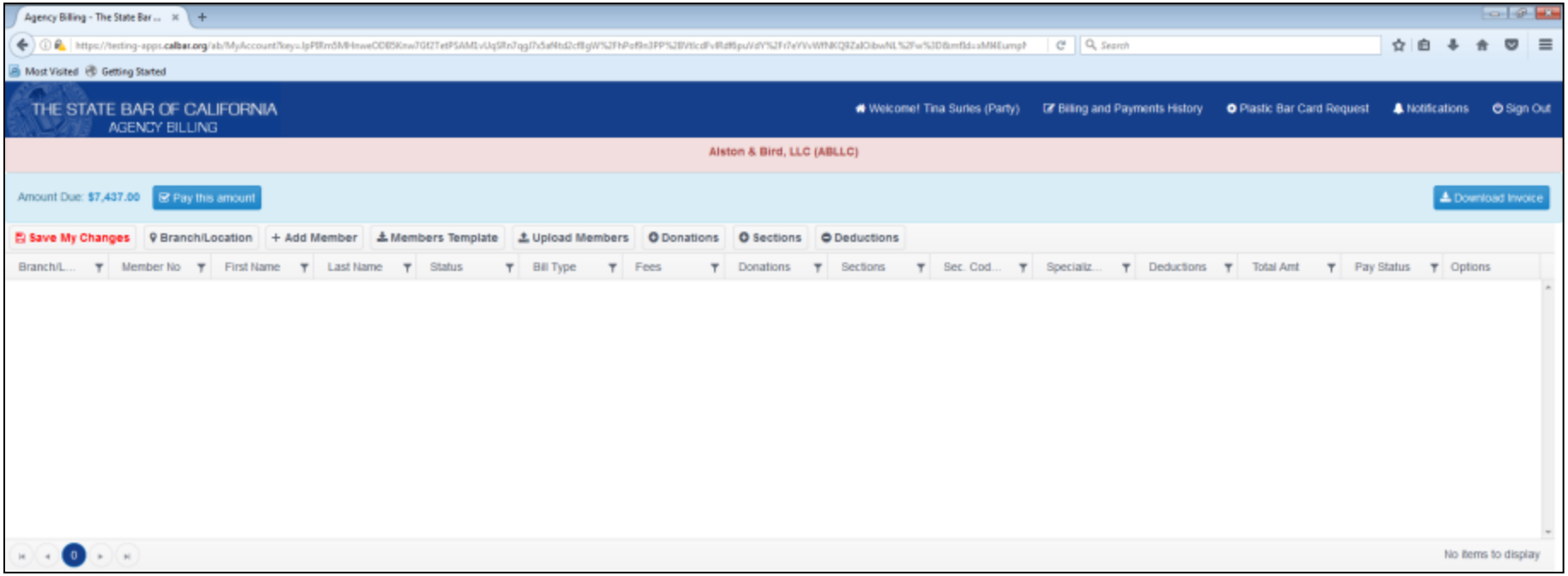
Once you "Complete Registration" in step 5, you will be taken back to the home page for the application. Enter the "Sign In Account" user name and "Password" that you created when you registered your agency. Click "Sign In" and you will be taken to your agency dashboard.



Agency Billing Application – Members Template

Step 7

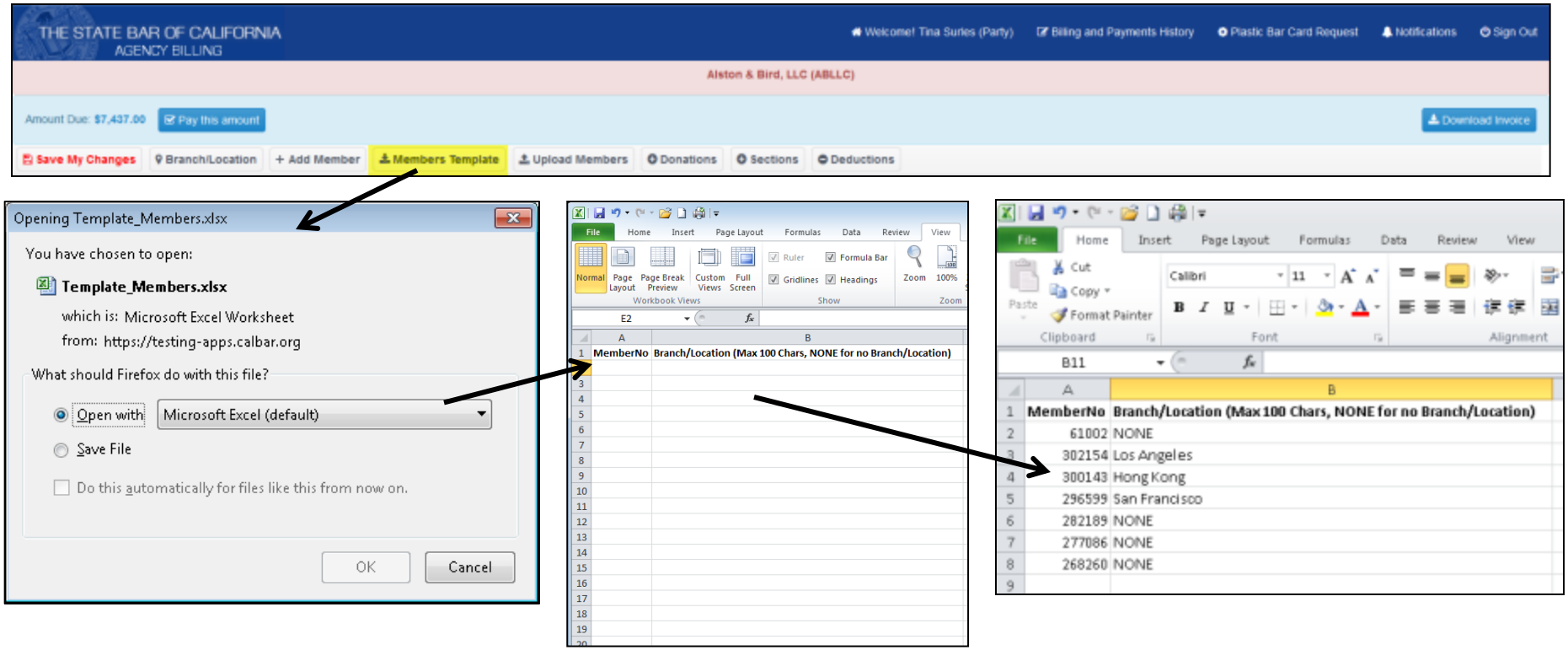
You will now be at your agency dashboard page. Here you will be able to add your Members for fee management and payment processing. Your first step, shown on the next page, will be to upload your members to your dashboard. If at any time you require assistance, please contact the Member Services Center at 1(888)800-3400.



Agency Billing Application – Members Template

Step 7 ctd.

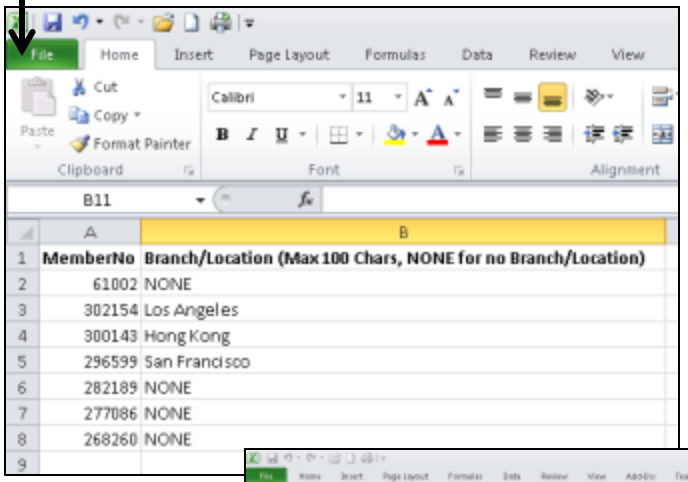
Click on "Members Template". This will download an excel spreadsheet. Open the spreadsheet and enter the Member number and Branch or Location for each of the Members in your Agency. Do not format the spreadsheet or add additional columns or information. If you do not wish to enter any branch information, please use the word NONE for each member in the Branch/Location column. Next you will save your template by following the instructions on the next page.



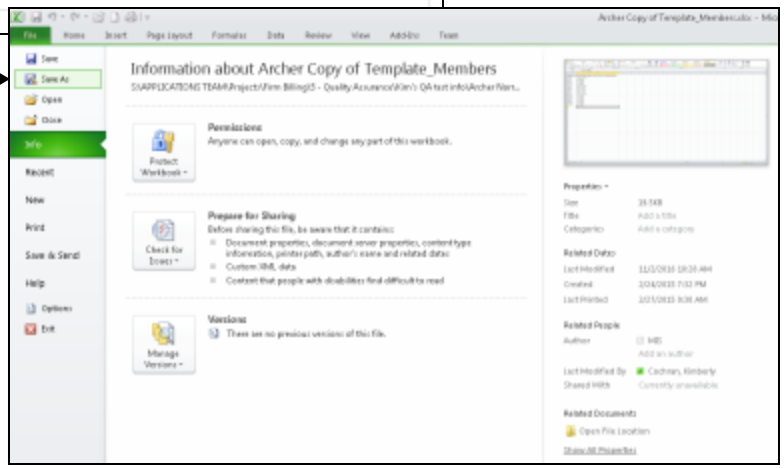
Agency Billing Application – Members Template

Step 7 ctd.

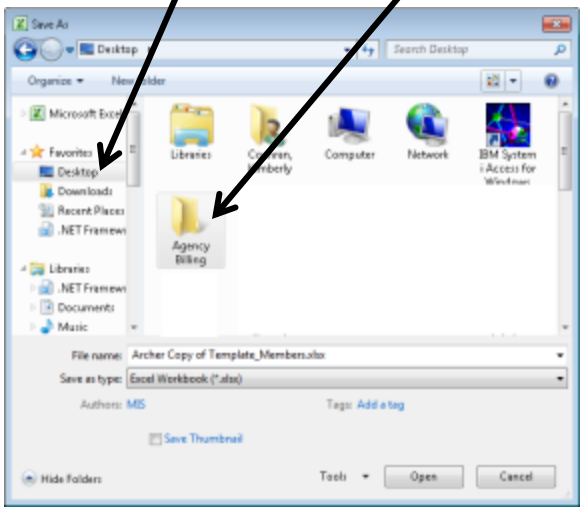
- 1. To save the file to your desktop or a folder of your choosing, in excel click the tab that says "File"



- 2. Click "Save As"



- 3. Enter a file name you will remember and place the file on your desktop or in a folder (example below)

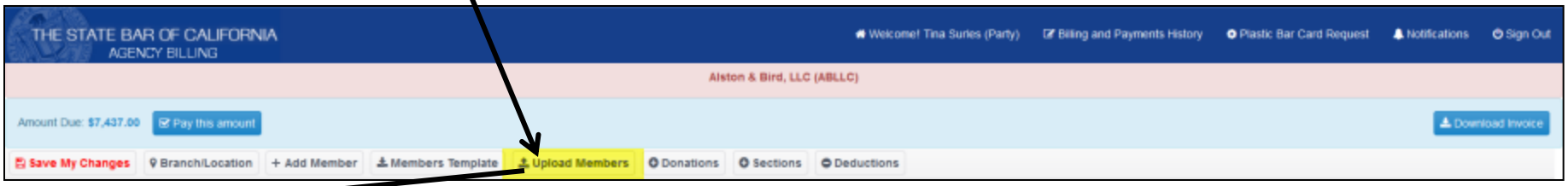


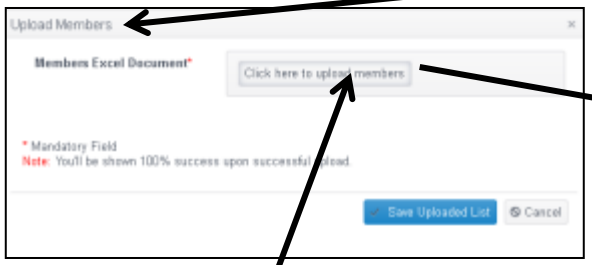
- 4. Once you have determined the location you wish to place your file, click "Save"

Agency Billing Application – Upload Members

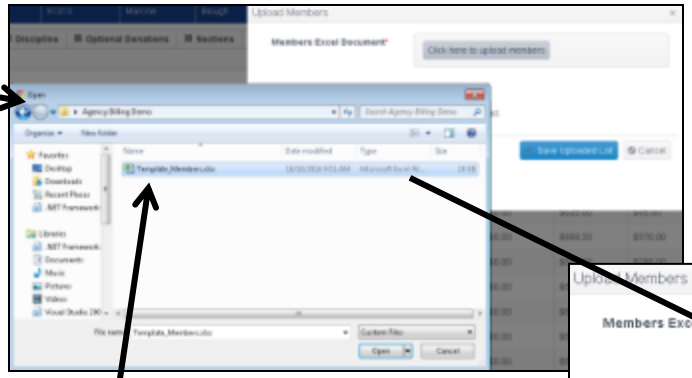
Step 8

- **1. Once your "Now click "Upload Members" which opens a new box for you to select your saved spreadsheet and load it into the system.**



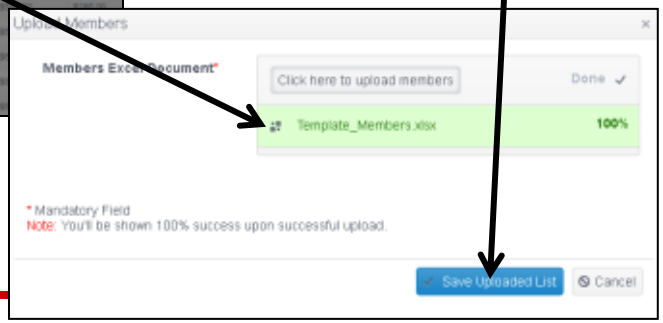


- **2. Now click "Click here to upload Members".**



- **3. A screen will open where you will now find your saved spreadsheet and select it for upload by double clicking the file.**

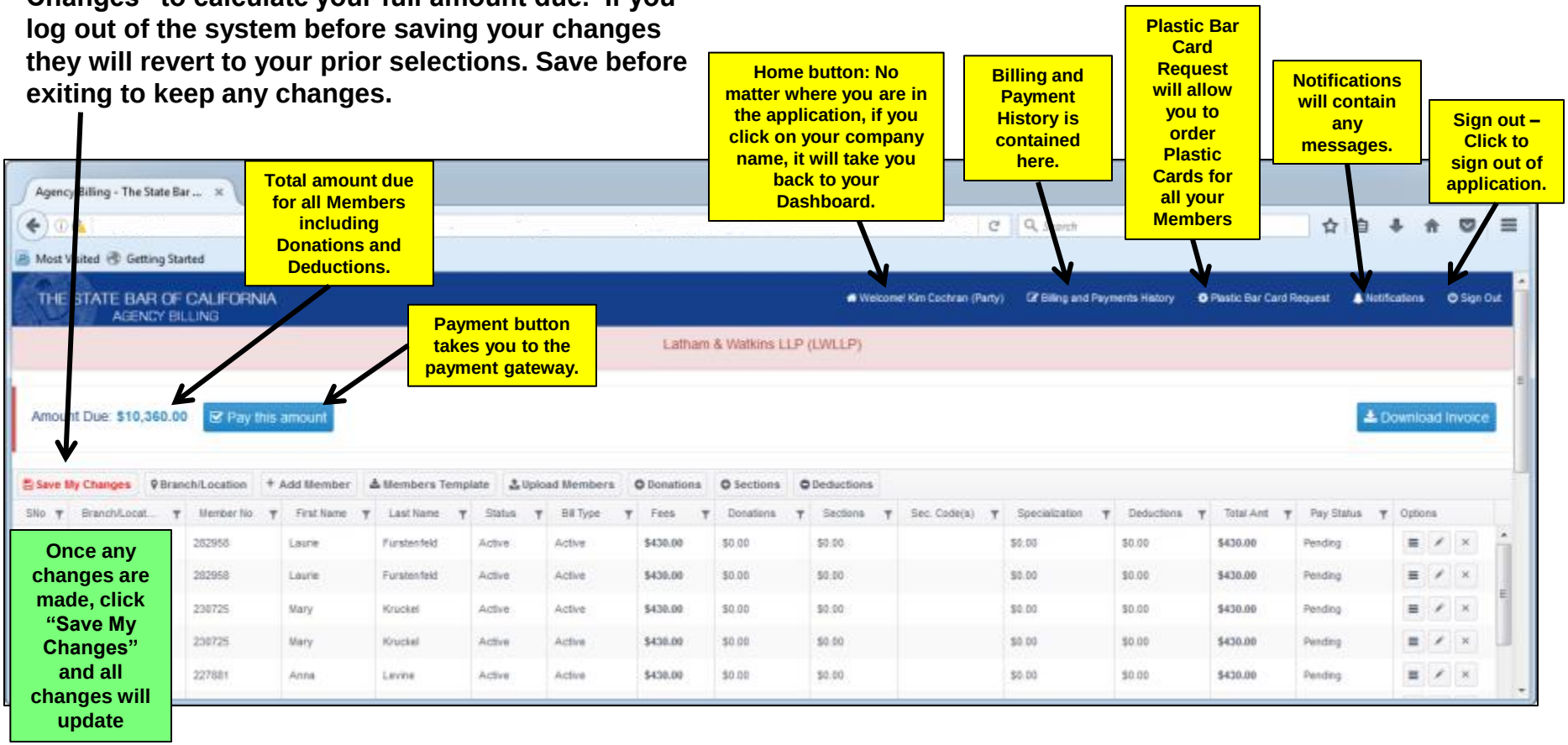
- **4. Click "Save Uploaded List" and voila! All your uploaded Members will show in your dashboard.**



Agency Billing Application – Agency Dashboard

Step 8 ctd.

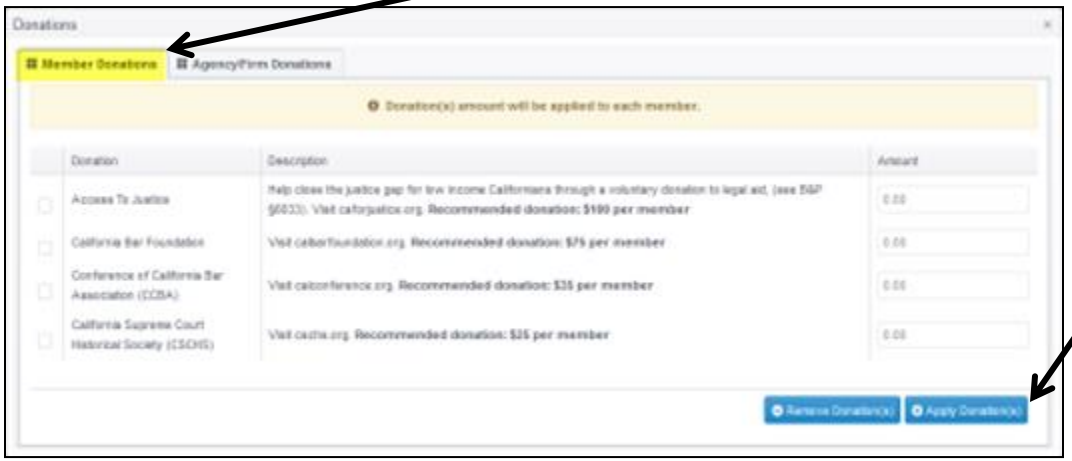
Now that your Members are loaded, click on "Save My Changes" to calculate your full amount due. If you log out of the system before saving your changes they will revert to your prior selections. Save before exiting to keep any changes.



Agency Billing Application – Donations

Step 9

- **1. Click on "Donations" to bring up the Donations box. This feature allows an Agency to make donations to multiple organizations on behalf of the Member or their Agency**



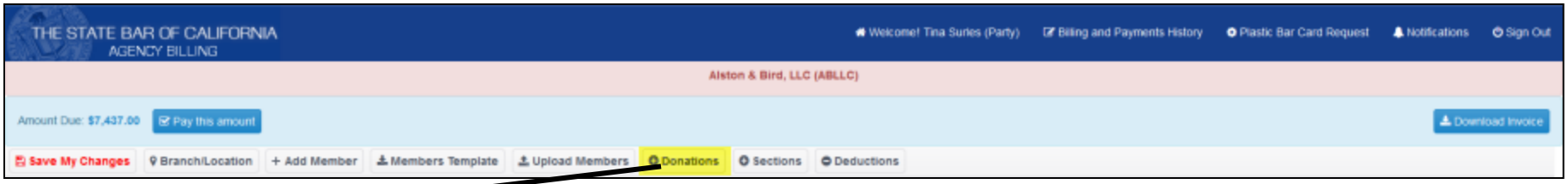
- **2. Choose which donations you would like to make and what amount you wish to donate. Click "Apply Donations". Your totals for the "Member Donations" will show in the line for each Member. Additionally, you can remove donations from all members by selecting the box next to the donation agency and clicking "Remove Donations".**

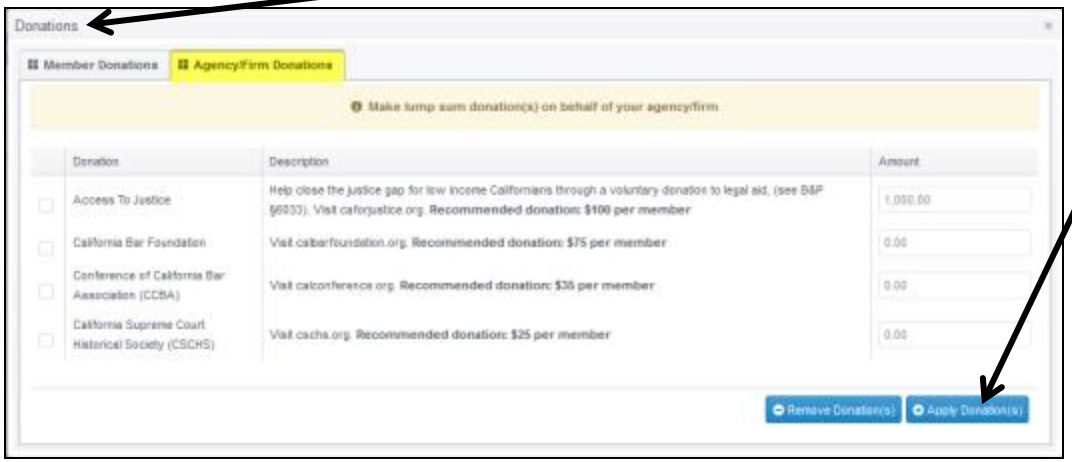
SNo	Branch/Locat...	Member No	First Name	Last Name	Status	Bill Type	Fees	Donations	Sections	Sec. Code(s)	Specialization	Deductions	Total Amt	Pay Status	Options
1	Davis	282958	Laurie	Furstenfeld	Active	Active	$430.00	$175.00	$0.00		$0.00	$0.00	$605.00	Pending	

Agency Billing Application – Donations

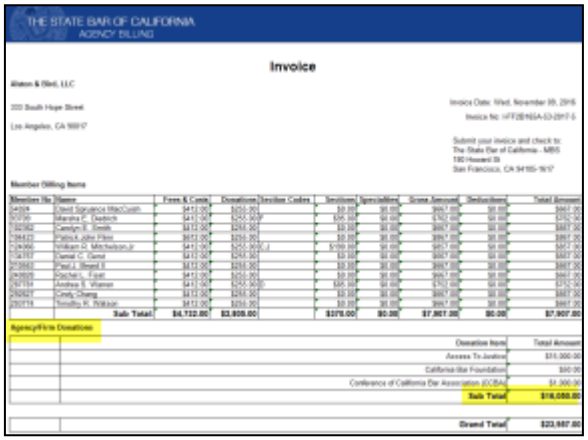
Step 10

- **1. Click on "Agency/Firm Donations" tab within the Donations tab to access the Agency Donations box. This feature allows an Agency to make donations to multiple organizations on behalf of the Agency.**





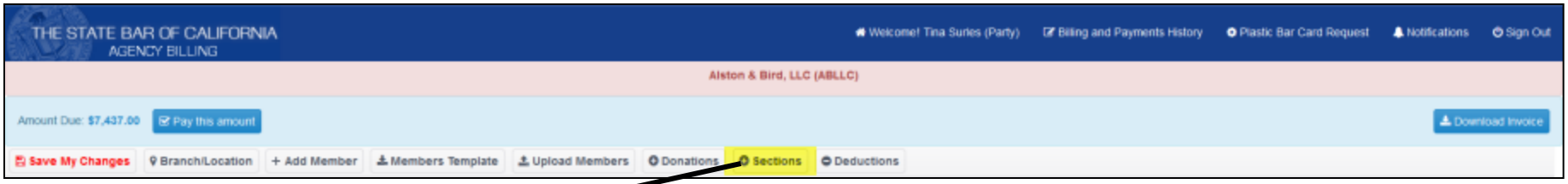
- **2. Choose which donations you would like to make and what amount you wish to donate. Click "Apply Donations". Your totals for the Agency Donations will show on the Invoice under Agency/Firm Donations**

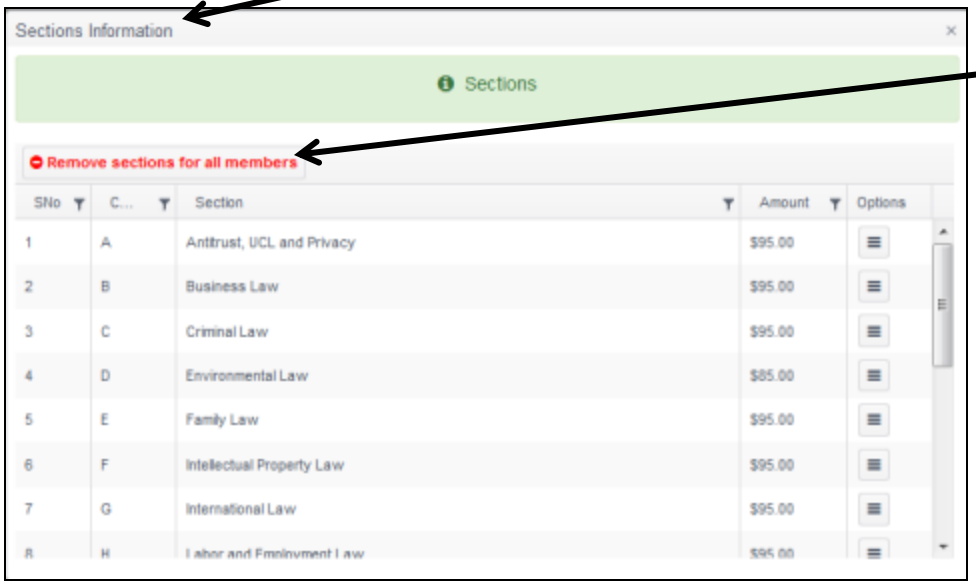


Agency Billing Application – Sections

Step 11

- **1. Click on "Sections" tab to manage Member Sections. This feature allows an Agency to decide which and how many Sections they wish to pay for the Member. This slide shows how to remove Sections. See the next page for adding Sections.**





- **2. Click "Remove sections for all members" to remove all sections from all members.**

Agency Billing Application – Sections

Step 11 ctd

- **1. Click on "Options" for the Section you wish to modify and a new window will open to choose additional Members to add that Section for.**

Sections Information

Sections

Remove sections for all members

SNo	C...	Section	Amount	Options
1	A	Antitrust, UCL and Privacy	$95.00	
2	B	Business Law	$95.00	
3	C	Criminal Law	$95.00	
4	D	Environmental Law	$85.00	
5	E	Family Law	$95.00	
6	F	Intellectual Property Law		
7	G	International Law		
8	H	Labor and Employment Law		

Section Options

Code: A Section: Antitrust, UCL and Privacy

Add Members

Branch/Location	Member No	First Name	Middle Name	Last Name	Options
San Francisco	77801	Douglas	Kent	Porter	
London	139098	Karen	Esther	Silverman	
Los Angeles	120965	Alfred	Carroll	Pfeiffer	
Los Angeles	102580	Daniel	Murray	Wall	

- **You will see which Members currently have this section if you didn't "Remove sections for all members".**

- **2. Click the box next to the member to choose additional Members to add to the section. Click "Add Selected Members" and the section will be added to each chosen member. You can click "Clear Selection" if you have selected incorrectly.**

Section Options

Code: A Section: Antitrust, UCL and Privacy

Add Members

Add Members

Code: A Section: Antitrust, UCL and Privacy

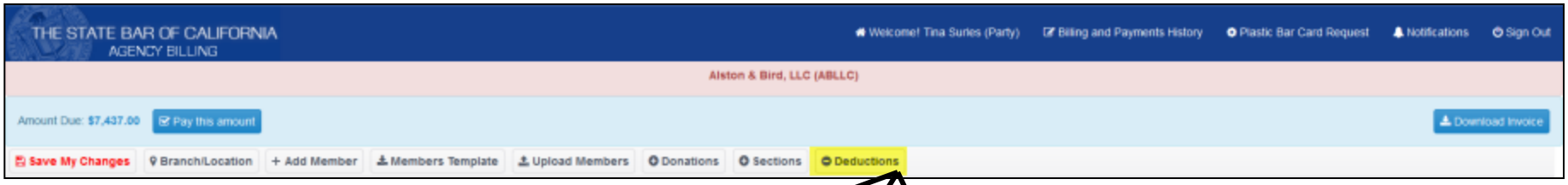
Add Selected Members | Clear Selection

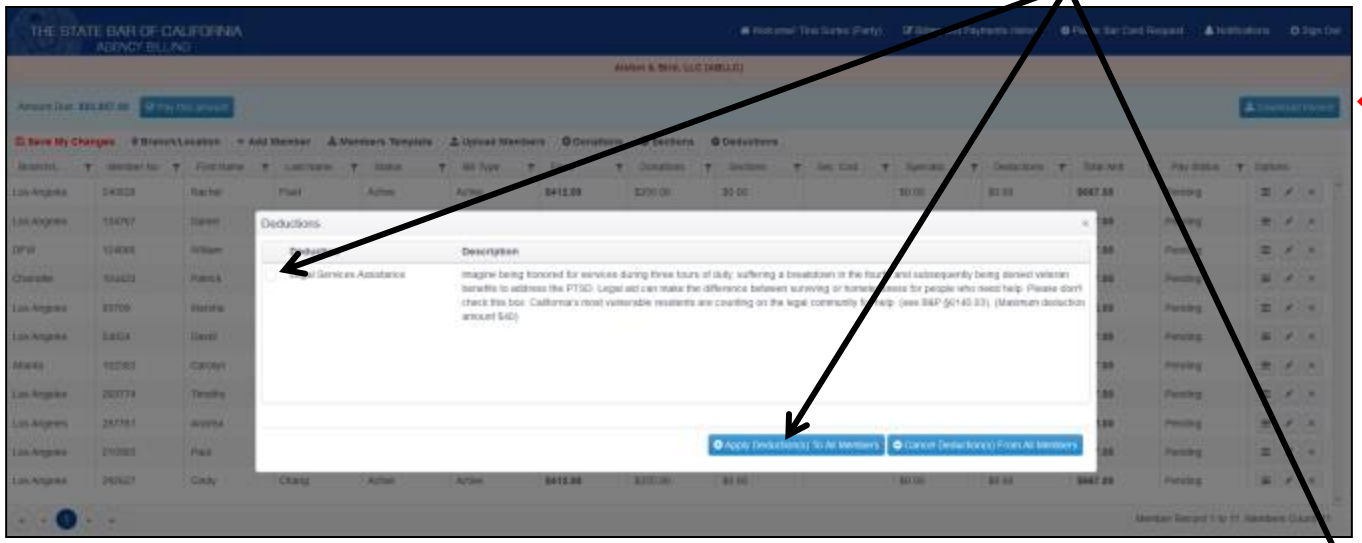
SNo	Branch/Location	Member No	First Name	Middle Name	Last Name
1	Fresno	34599	Carmen	Anthony	Eanni
2	Fresno	39942	Susan	Wittenberg	Liebeler
3	Fresno	43684	Richard	Adrian	Seaman
4	Fresno	48646	Douglas	Alson	Sears

Agency Billing Application – Deductions

Step 12

- **1. Click on "Member Deductions" to bring up the Deductions box. This feature allows an Agency to take applicable deductions for all Members of their Agency**





- **2. Select the deduction shown by clicking the box next to it to select it. Click "Apply Deduction(s) to all Members". This will apply the deduction to all Members and the deduction amount will show under the Deduction tab for the Member. You can also "Remove Deduction(s) from all Members" if you decide not to take Deductions**

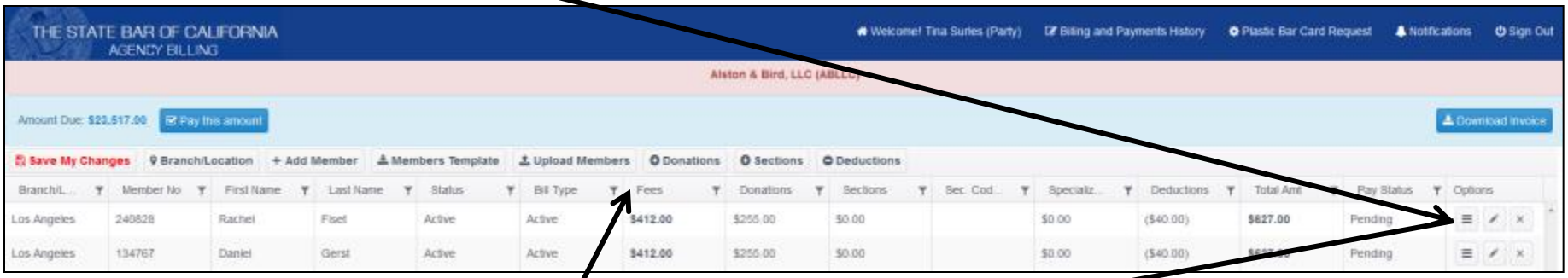
Branch/L...	Member No	First Name	Last Name	Status	Bill Type	Fees	Donations	Sections	Sec. Cod...	Specializ...	Deductions	Total Amt	Pay Status	Options
Los Angeles	240828	Rachel	Fiset	Active	Active	$412.00	$255.00	$0.00		$0.00	($40.00)	$627.00	Pending	

SNo	Branch/...	Member...	First Na...	Last Na...	Status	Bill Type	Fees	Donations	Sections	Sec. Co...	Speciali...	Deducti...	Total Amt	Pay Sta...	Options
1	London	179096	Hebe	Doneski	Active	Active	$430.00	$175.00	$0.00		$0.00	$0.00	$605.00	Pending	

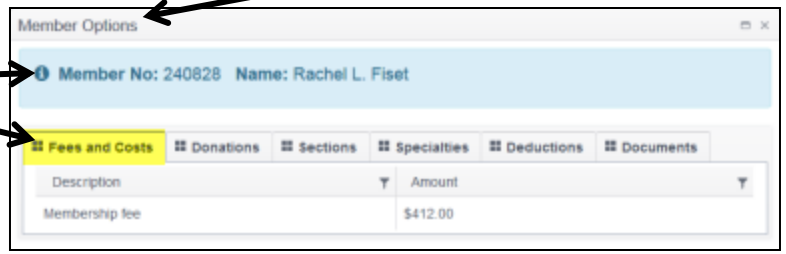
Agency Billing Application – Member Options

Step 13

Earlier you managed Donations and Deductions as a group for all your Members. You can also manage these items as well as Section Fees and Legal Specialization Fees when applicable. You will also have the ability to print documents such as the Member's fee statement.
Click on the box with the 3 lines that show under Options for the Member you wish to manage additional items for.



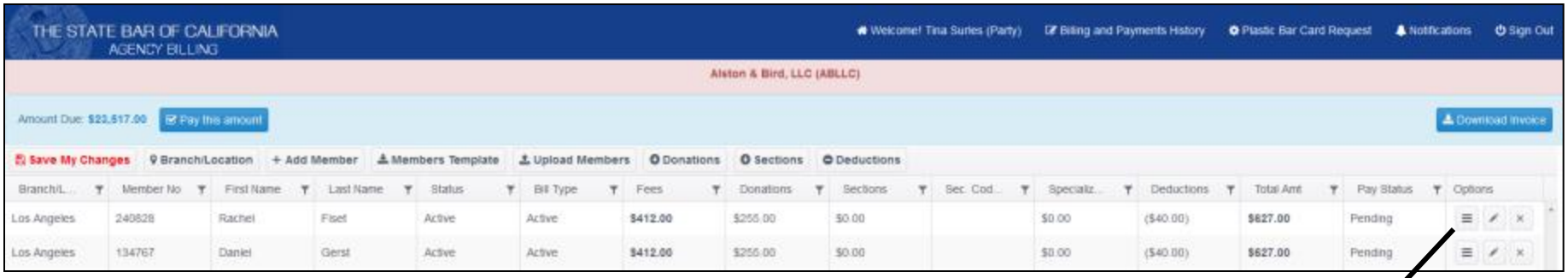
At the top of the box you will see the Member name and number to make it easier to remember who you are working with. The first tab, "Fees and Costs", shows you all the fees this Member owes for the 2017 billing year. This total amount also shows on your dashboard under Fees.

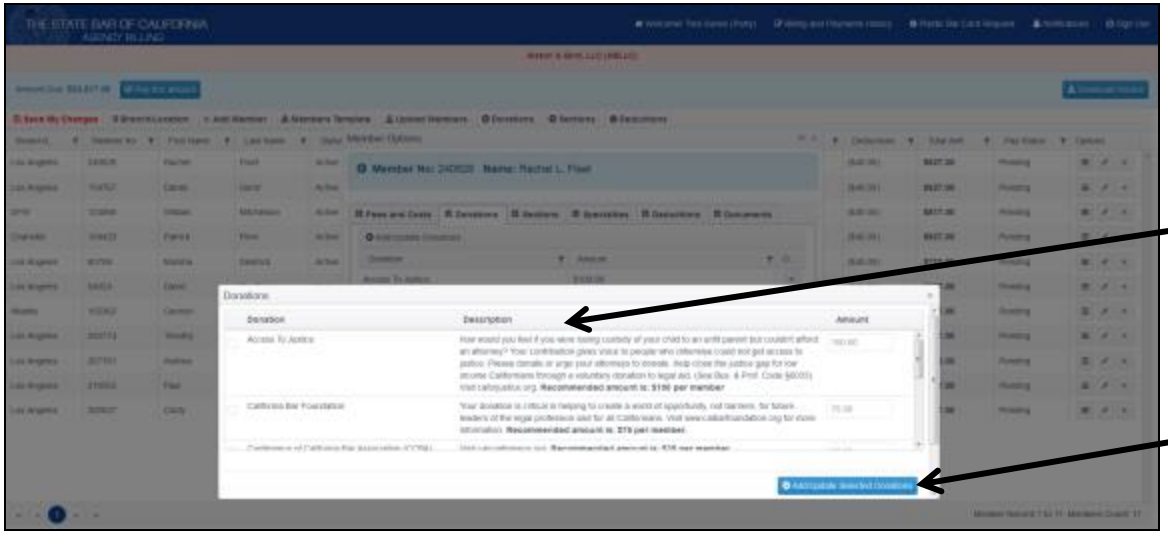


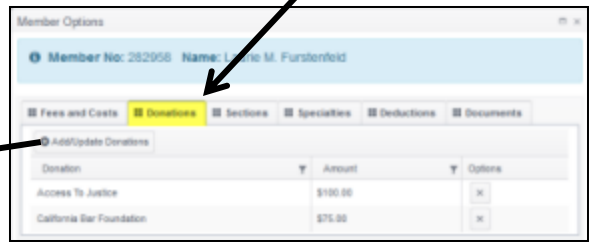
Agency Billing Application – Member Options

Step 13 ctd

- **1. Click on the "Donations" tab and you can manage donations at the individual level for your Member. You can click "Add/Update Donations" and a new box will open allowing you to add or remove donations.**







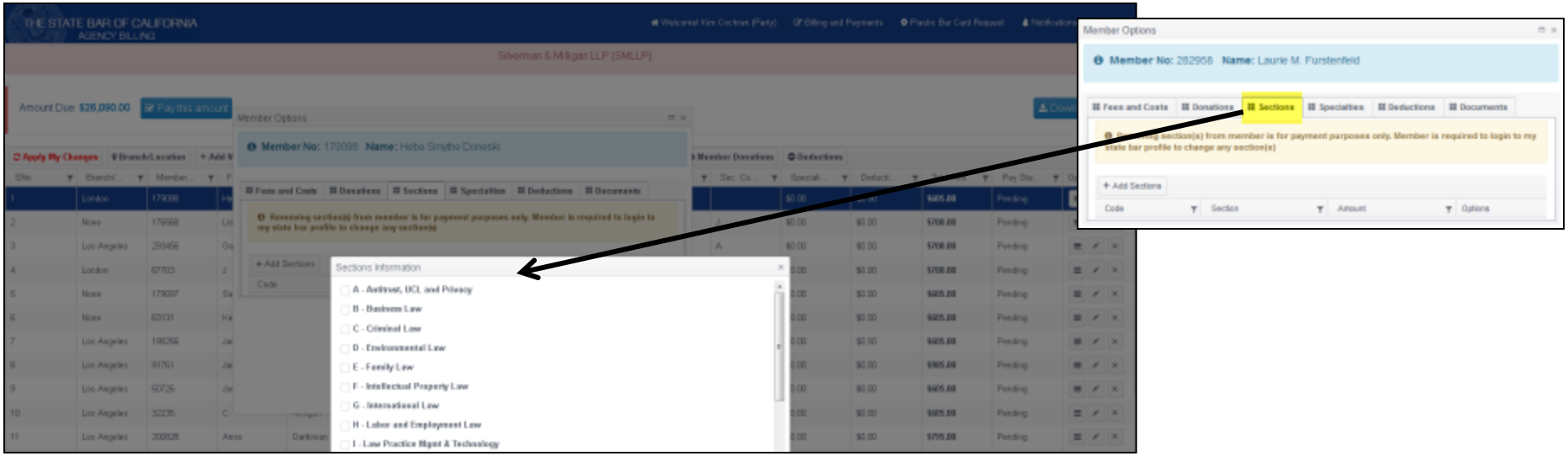
- **2. Once you select or remove the donation, click the blue "Add/Update" Selected Donations and the donations will be added or removed as selected**

21

Agency Billing Application – Member Options

Step 14

- **1. You can also add Sections to individual members by clicking on the "Sections" tab as well as see any Sections the Member may already have listed. Click "Add Sections" to add as many Sections as you wish to pay for your Member. The system will add them and calculate the total for you.**

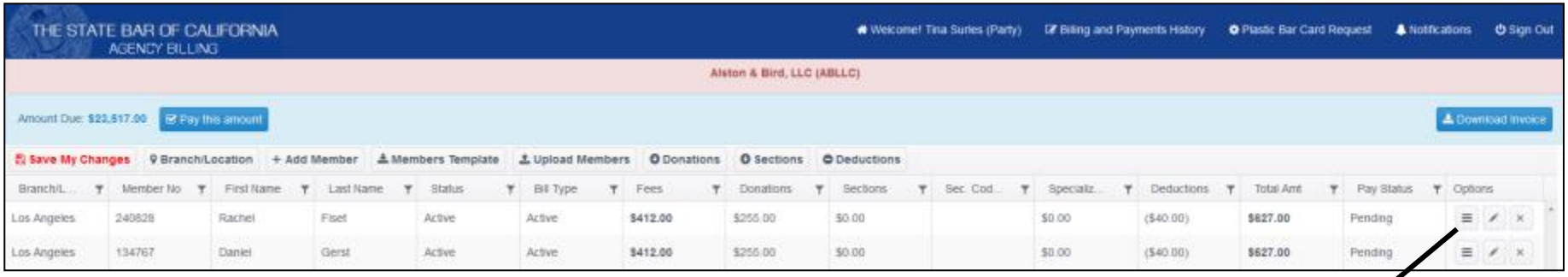


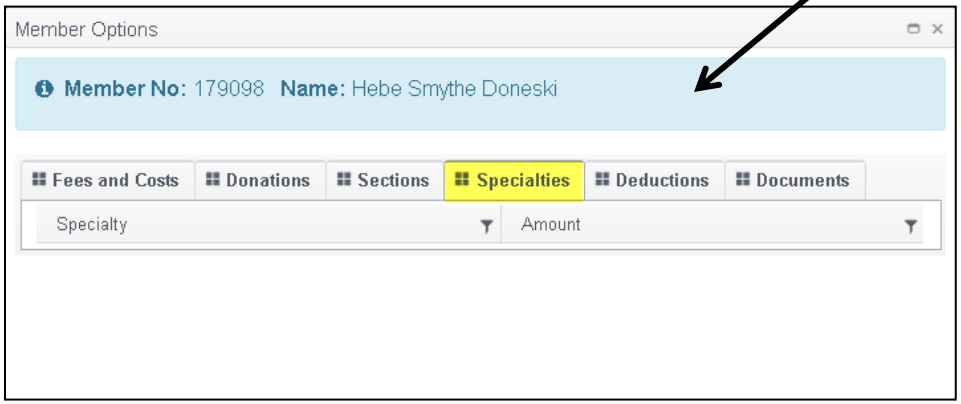
22

Agency Billing Application – Member Options

Step 15

When you click on the "Specialties" tab you will see any Legal Specializations the Member is qualified for. You can choose to pay or not pay for these when they are applicable. (These will not show for 2017 as the fees are being waived this year.)

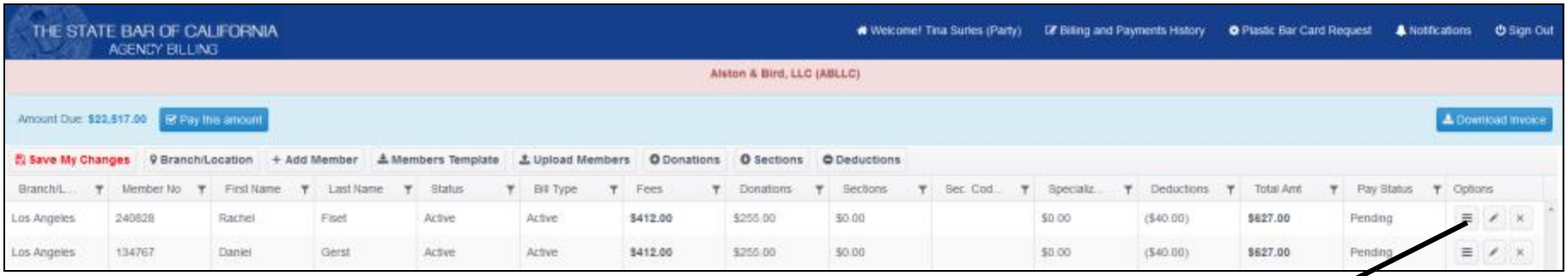


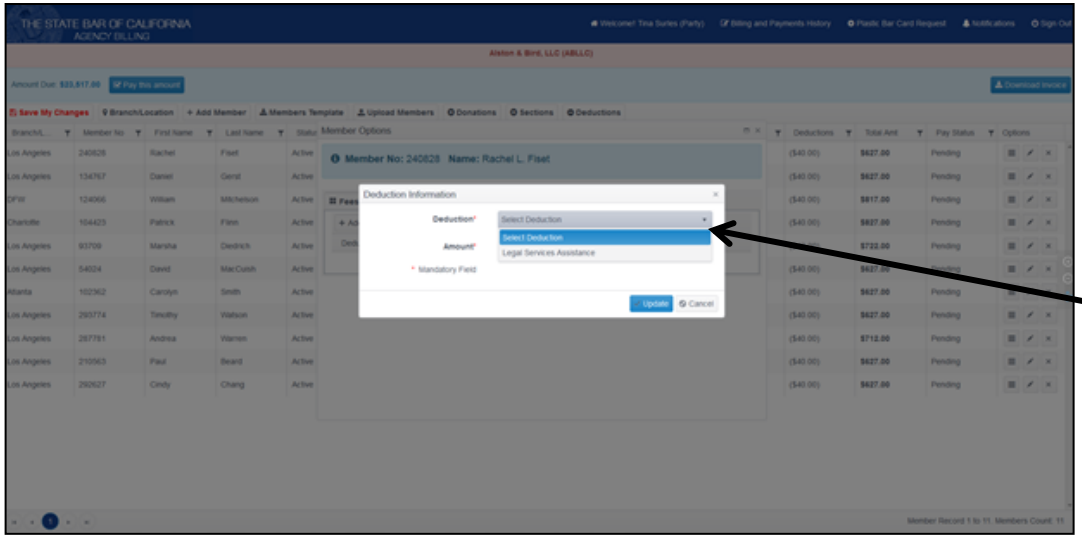


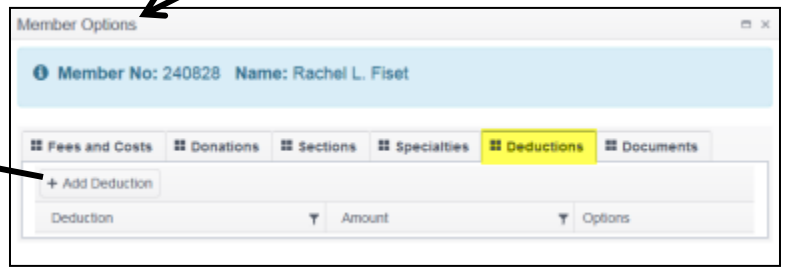
Agency Billing Application – Member Options

Step 16

Click on the "Deductions" tab to manage Deductions at the Member level vs. the firm level. Click "Add Deductions" to select the individual deductions for the Member. Once selected click "Update" and the deductions will show on your dashboard page for member





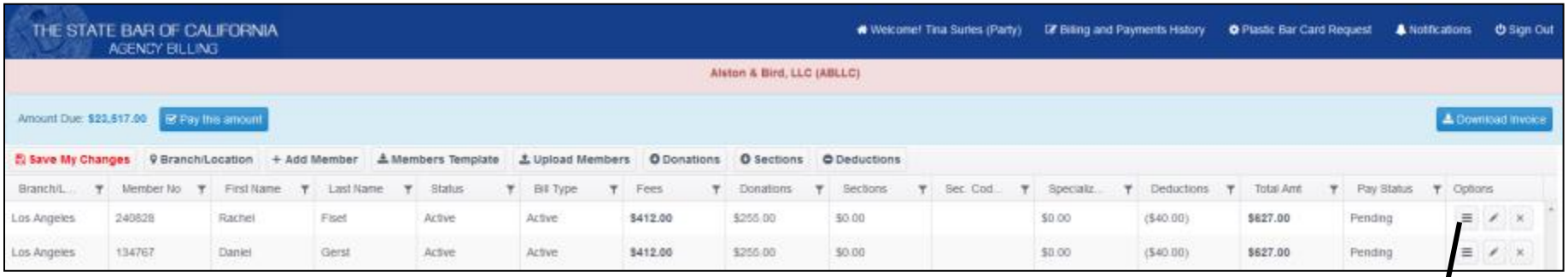


24

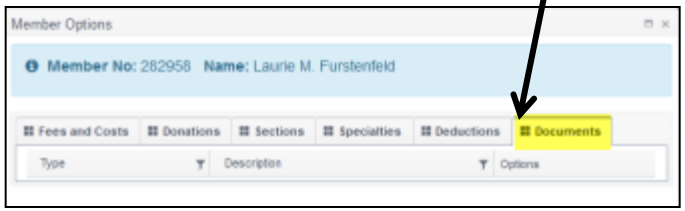
Agency Billing Application – Member Options

Step 17

Click on the "Documents" tab to print a copy of the Member's fee statement



Once your payment has successfully processed, you will log back into the system, click on "Plastic Bar Card Request" and this window will open, allowing you request a plastic bar card to be sent to your Member. Once you select the box for the member, click on "Generate plastic bar card for selected Members" to complete the process.

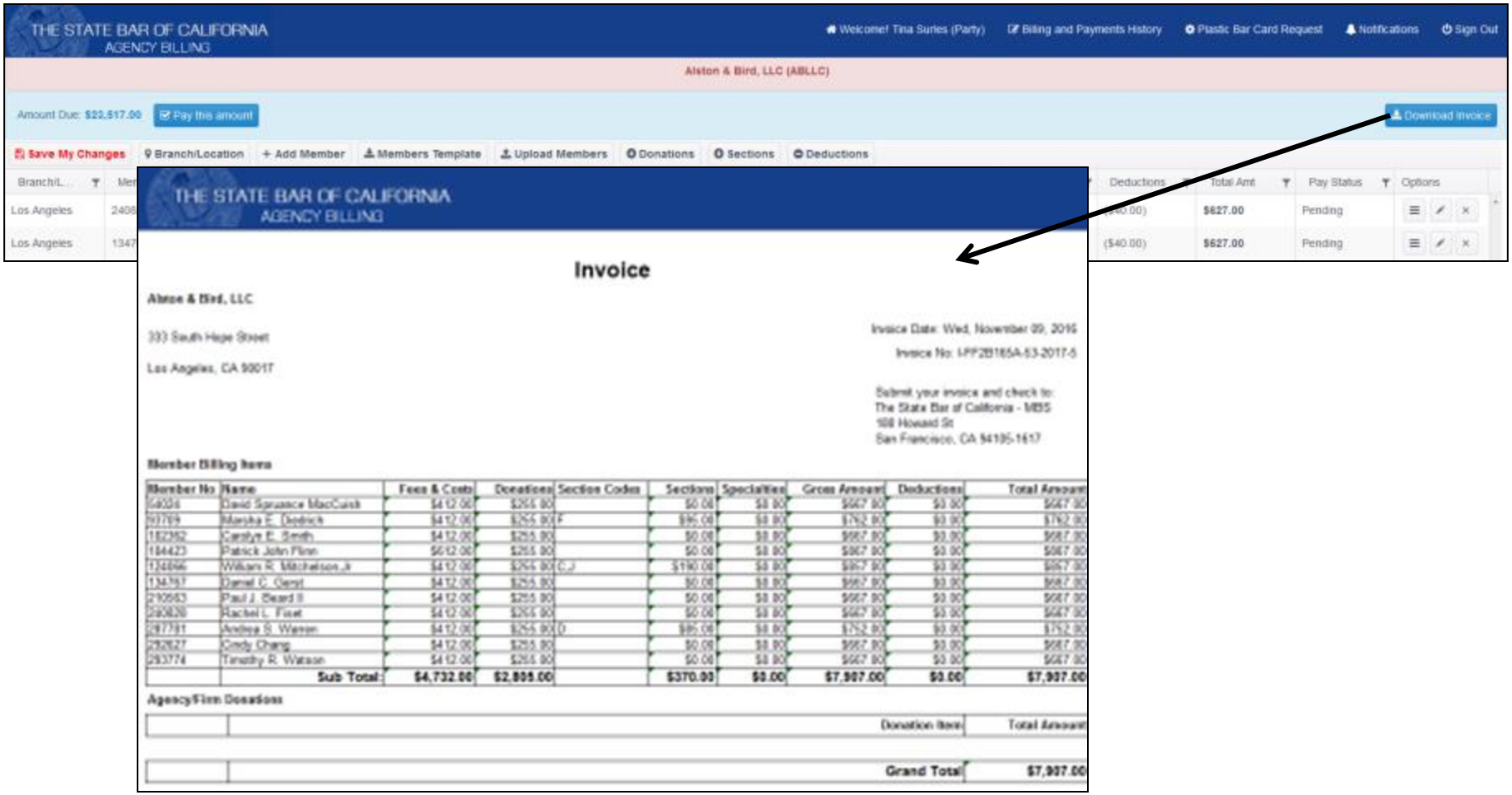


25

Agency Billing Application – Member Options

Step 18

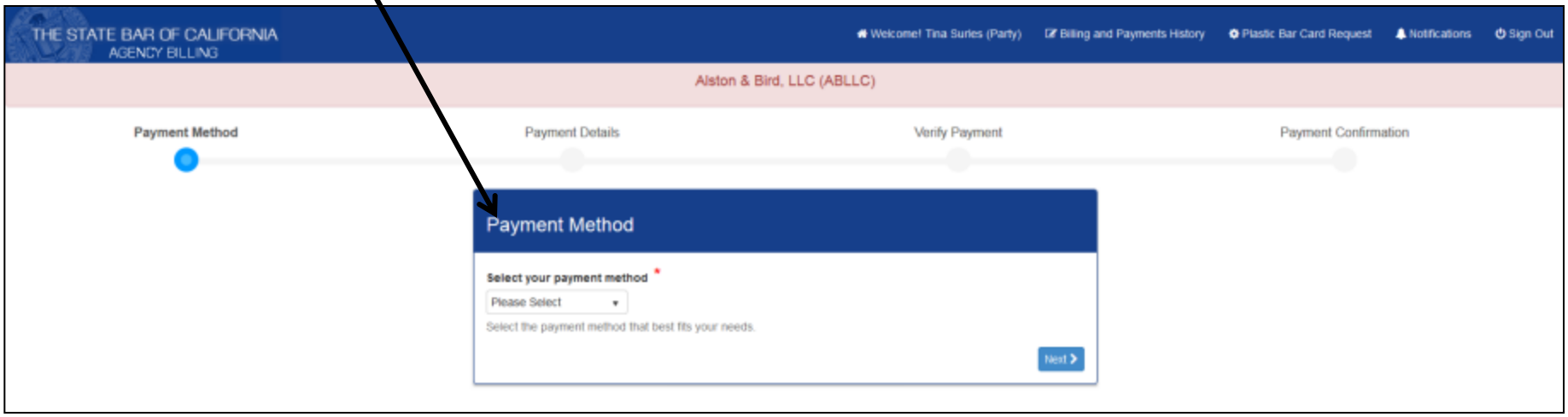
For those Agencies who are unable to submit credit card or ACH payments, we have provided the ability for you to "Download Invoice" which will show all your selections and totals to submit to the State Bar with your payment



Agency Billing Application – Payment Gateway

Step 19

Once you have completed all selections and the system has calculated your total, click on "Pay this amount" and you will be taken to the Payment Gateway to complete the processing of your payment

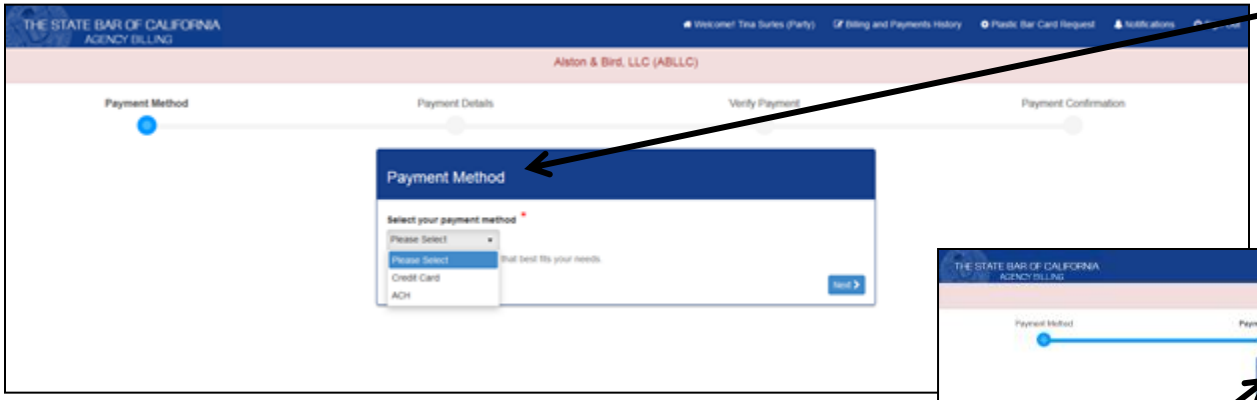


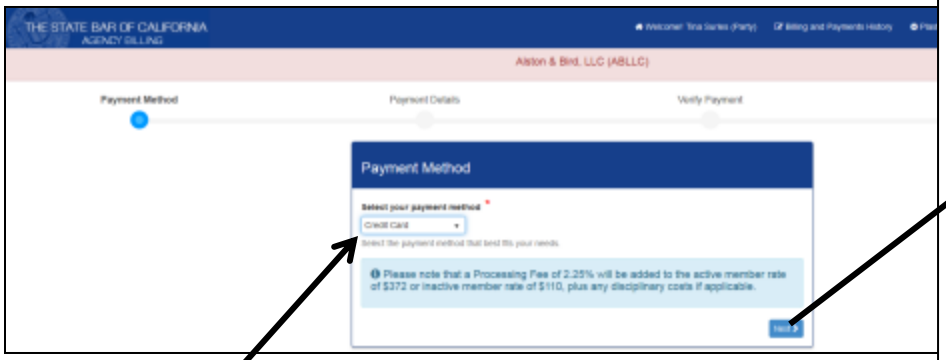
Agency Billing Application – Payment Gateway

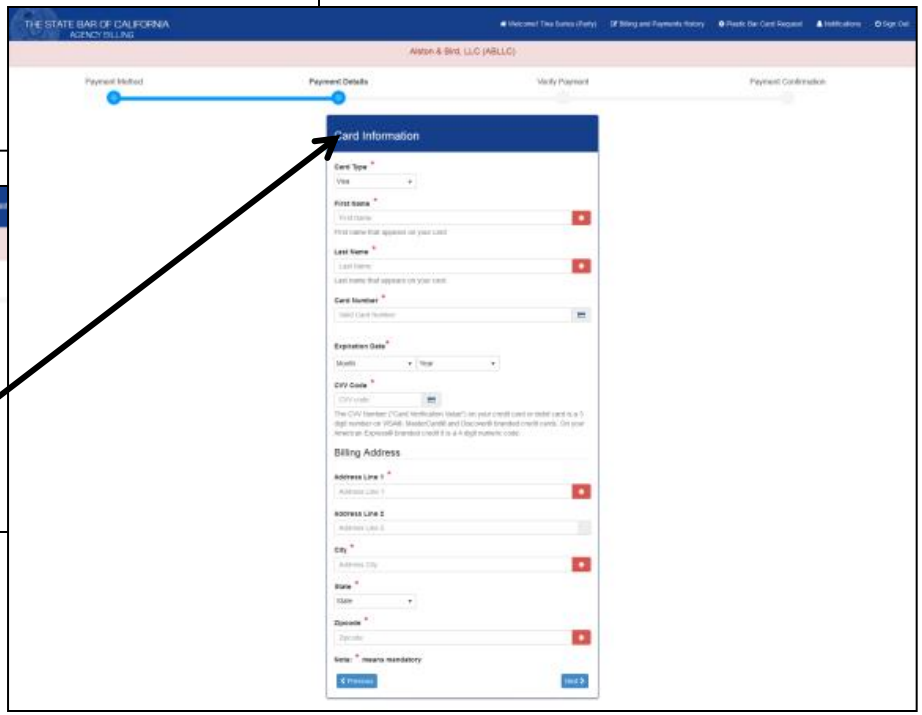
Step 20

Clicking the Pay this amount button opens a new window for you to select your payment method. We will accept both ACH and Credit Card payments. Choose your payment method. The following slides will show you the process for both credit card and ACH

1. Choose Payment Method





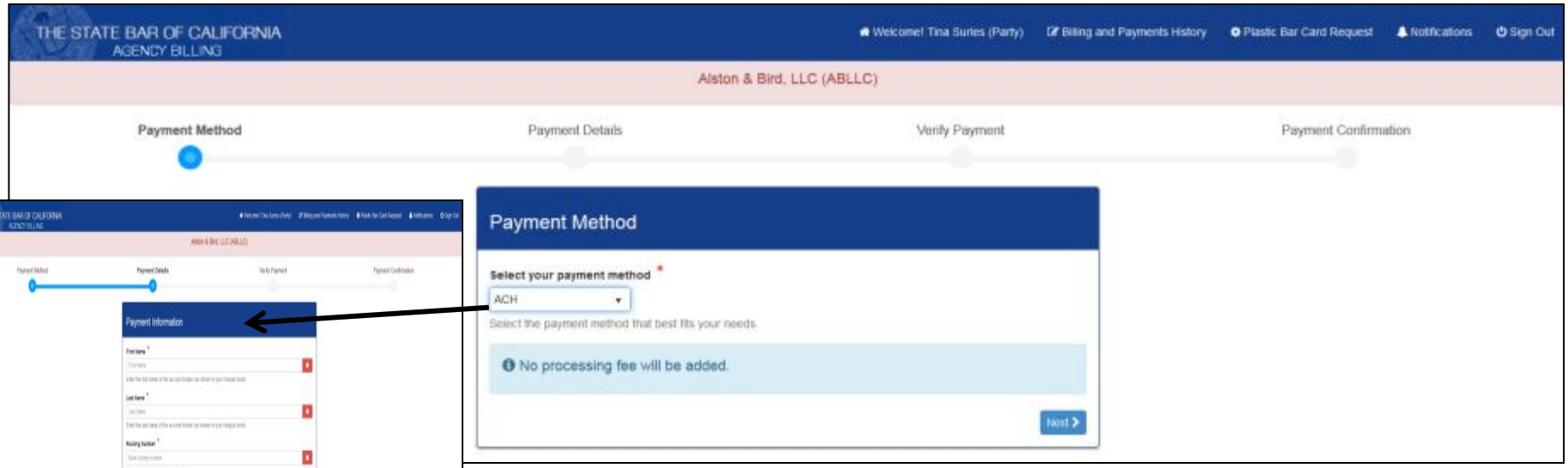


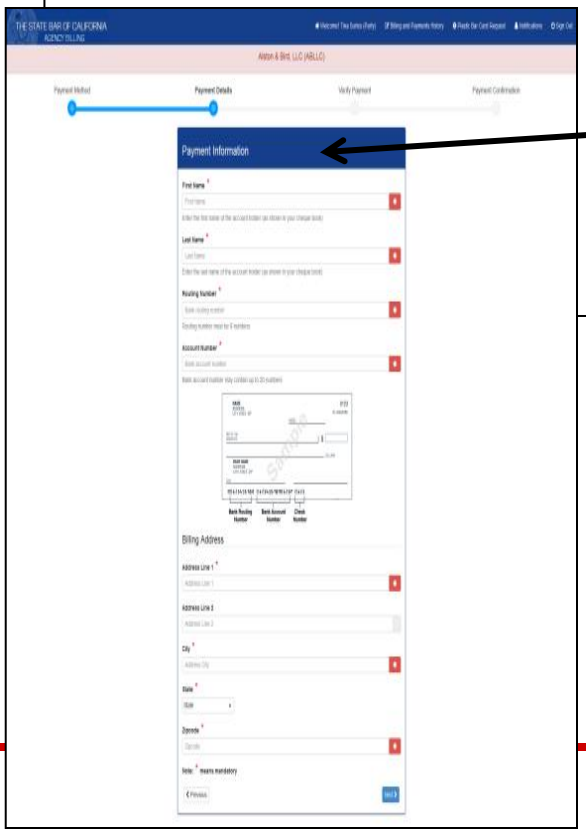
2. You can choose Credit Card, complete all information and click “Next” and complete the payment process

Agency Billing Application – Payment Gateway

Step 20 ctd

Clicking the Pay this amount button opens a new window for you to select your payment method. We will accept both ACH and Credit Card payments. Choose your payment method. The following slides will show you the process for both credit card and ACH





2. or, you can choose ACH, complete all information and click "Next" and complete your payment process

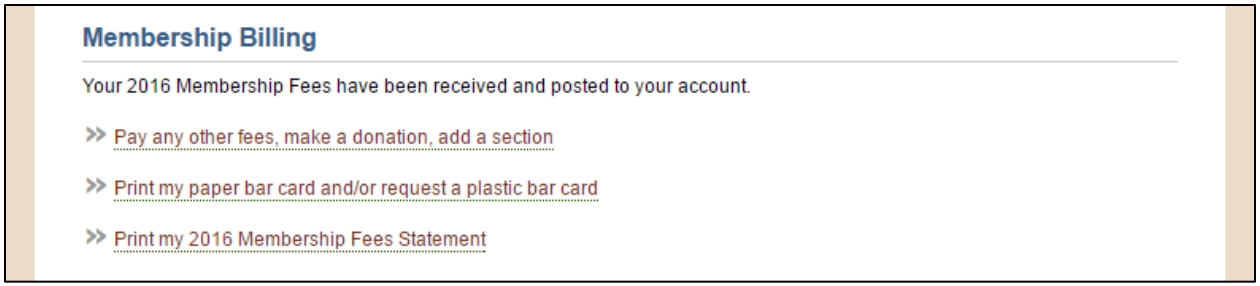
Agency Billing Application – Member Options

Step 21

Once your payment has successfully processed, you will log back into the system, click on "Plastic Bar Card Request" and this window will open, allowing you request a plastic bar card to be sent to your Member. Once you select the box for the member, click on "Generate plastic bar card for selected Members to complete the process

Agency Billing Application – Payment Gateway

Once the fees have processed successfully, the Member will receive an email advising his or her Bar Fees have been paid and to log into their "My State Bar Profile" to pay any additional fees not paid by the agency or complete any other necessary transactions.

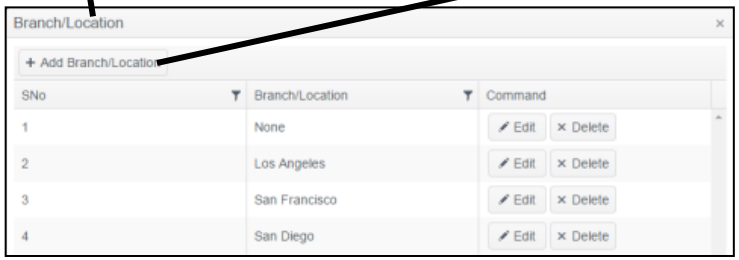


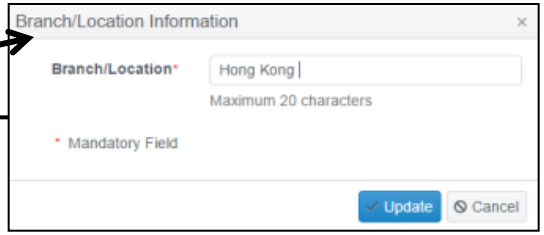
Agency Billing Application – Other Functionality

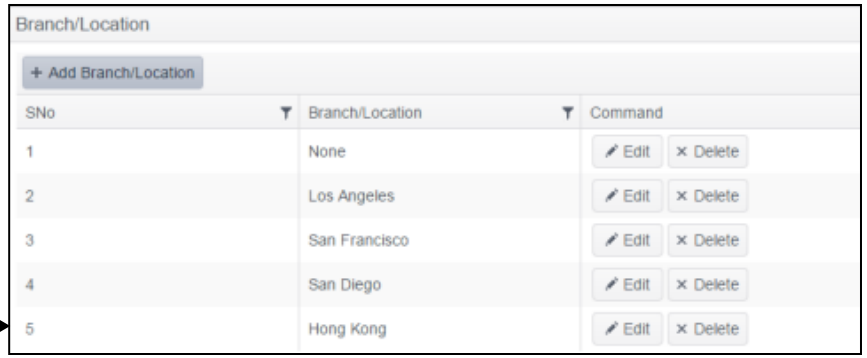
In the next pages, you will find other functionality the Agency Billing Application provides for your Agency.

Agency Billing Application – Branch/Location

The Agency Billing Application allows you to keep track of your Members who have California Bar Fees due but reside in locations other than California. Click the Branch/Location button to add all branches your Agency has and associate your Members to those locations or branches

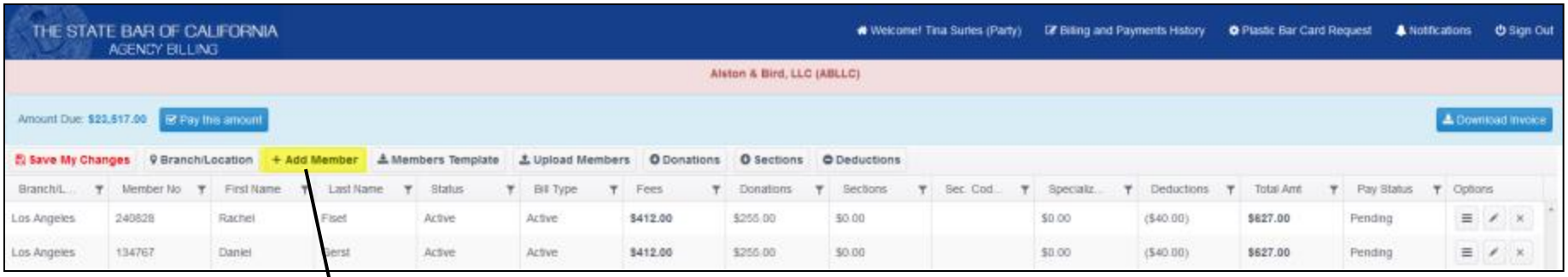


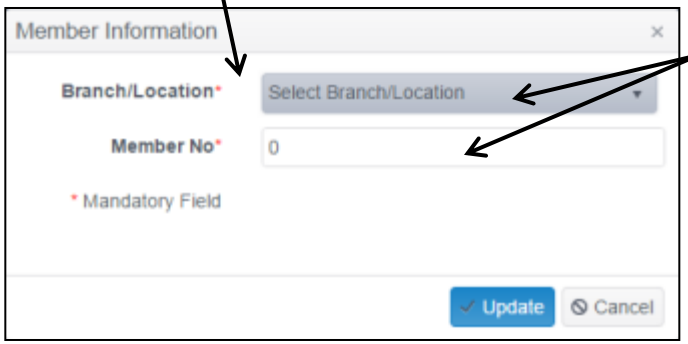




Agency Billing Application – Add Member

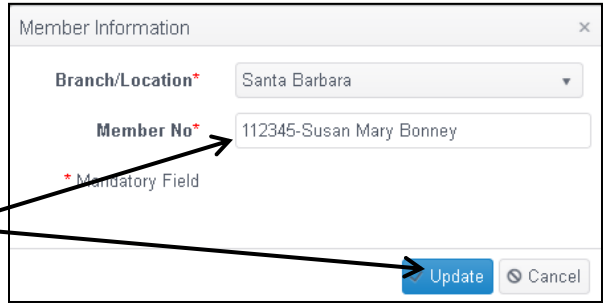
Your Dashboard allows you to add additional Members to your firm. Alternatively, if you have added someone incorrectly or if someone has left your employ, you can delete a Member from your firm list.

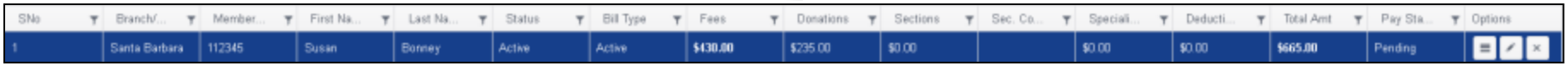




When you click "Add Member", a new window will open and allow you to select the Branch the Member is located in and enter their Member number.

The Member number will validate and you will click update. This will create the newly added Member to your list.





Agency Billing – Questions?

Please send all your questions and comments to Heidi Schwab-Wilhelmi at: Heidi.Schwab-Wilhelmi@calbar.ca.gov or (415)538-2274