Instructions for registered firms to "Join CounselLink Registry"

Once you are registered with CounselLink at www.counsellink.net, you will need to complete the following steps.

In the **Profiles** section of your CounselLink **Home** page, click the link under **Offices**. This will take you to the Office Profile. Please edit the following areas:

1. Areas of Law:

- Click the 'Edit' button next to **Areas of Law**
- 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). Areas of law currently used by Registry clients are **Insurance Defense, Recovery** and **Product Warranty**
- Click '**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-N/A from the 'Offered Counties' box***.
- Click **'Save'**

3. Add Users:

If the attorneys are being added for the first time:

- Click the **Add User** button (on the right side) to add a new timekeeper
- **Practicing Attorney** = change default to Yes if appropriate
- **Activate Login?** = If the individual/timekeeper will need Login access, change to YES; otherwise leave the default setting of NO and do not enter the email address.
- Primary Timekeeper ID = 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**
- Repeat until all timekeepers are entered

4. Join CounselLink Registry:

- Go to '**InfoCenter'** tab at the top of the screen
- Click the 'Join CounselLink Registry' link
  - Note: If this link does not display to you, you are already a part of the Registry
- Click '**I Agree'** on disclaimer
- Click **'Continue'**
- Read and electronically sign the **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: Only a user with the Partner or Admin role will be able to access. Let us know if you need this role.**
- Click on **I Agree**
- Enter in your **Malpractice Insurance Information** (Please send a copy to counsellinkcredentialing@lexisnexis.com)
  - Click '**Save & Continue'**
- Select at least one private attorney and designate them as a Registry attorney.
  - Click '**Save & Continue'**

  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 & Continue'**
- The next two pages are optional information to be able to show the client this attorney's languages and awards if any.
    - Click '**Save & Continue'**

5. **Convert existing Attorneys to Registry status**:

In the **Law Office Profile**, scroll down to where you see all the individuals listed by name

- 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.

6. **Malpractice Insurance:**

Email a current copy of your Malpractice Insurance Declaration Sheet to counsellinkcredentialing@lexisnexis.com or you can fax it to **866-960-2895 Attn: Credentialing**

For registration assistance, feel free to contact Attorney Implementation at:
attorneyimplementation@lexisnexis.com
800-600-2282

Thank you and welcome to CounselLink!!