STATE BAR OF TEXAS FIRM BILLING

FY 2021-2022 User Guide

State Bar of Texas – Membership Department 800-204-2222 x1383 or 512-427-1383 FirmCoordinators@TEXASBAR.COM

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SYSTEM OVERVIEW

The State Bar of Texas Firm Billing application allows firms to manage the payment of bar dues, legal service fees, section dues and Access to Justice contributions on behalf of your firm's attorneys. In one convenient location, coordinators can manage the firm's payment options, build their roster of Texas attorneys, edit billing options for individual attorneys, generate one invoice for the entire firm, and make a payment.

If your firm is not registered to participate in Firm Billing with the State Bar of Texas, please visit <u>https://firmbilling.texasbar.com/register</u> to sign up. Once your application has been approved you will receive an email with instruction on how to login.

GETTING STARTED

If you already have a login and password, go to <u>https://firmbilling.texasbar.com</u> to login. If you are logging in for the first time you will be prompted to reset your password.

Once logged in you will come to the home page for your firm account. Navigation menus are always available in the top header. Access permissions for your firm account can be managed under the 'Manage Account' menu. On the home page, the process for completing your firm payment is laid out in 3 easy steps:

Step 1: Payment Options

Step 2: Attorney Roster

Step 3: Invoice and Pay



MANAGE USER ACCESS

As the Primary Firm Coordinator, you can easily add or remove users from your firm account. Adding a Secondary Coordinator account gives the user access to all the same functionality as the Primary Coordinator, but they cannot add or delete new users. A secondary account may be useful when you need to have the accounting department login and make the payment for the firm.

1. Click your name in the upper right hand corner and select Manage Account from the drop down menu.

STATE BAR of TEXAS		Payment Options		Payment Due By June 1	Jane Smith 💄 🗸
Firm	Billing)			Manage Account Log Out

2. On the Manage Account page you can add, edit or delete a Secondary Coordinator. Once you have added a new coordinator, the user will receive an email with their login credentials to the Firm Billing portal.

Manag	ε Αςςοι	unt			
Smith & Smit All coordinators are abl name or password, by o Coordinator', delete a s contact the Membershi	:h LLP e to update their mailing :licking 'Update Credentia econdary coordinator by p Department at (800) 20	address, email addr Ils'. Primary Coordin clicking the delete i 4-2222 x1383 or (51	ess, and phone number on t ators have the ability to add con â, and edit contact infor 2) 427-1383, or email firmco	he page below. Coordinators ca a secondary coordinator, by cli rmation by clicking the edit icor pordinators@texasbar.com.	an also change their user cking 'Add a New rℤ. For assistance, please
Contact Inform	ation			Manage Coo	rdinators
First Name	Last Name			Jane Smith	
Jane	Smith		Update Credent	tials (Primary) Austin	
Address 1*				James Smith	(2) 前
123 Main Street				(Secondary) Austin	
Address 2					New Constitution
				Add a	New Coordinator
City*		State*	Zip*		
Austin		Texas	• 78711		
Email Address*		Phone			
jsmith@smithsmith.co	om				
		Save			

SELECT PAYMENT OPTIONS

The first step in the process is to select the firm's payment options. Navigate to the Payment Options page by clicking Payment Options in the top header. These payment options indicate which items the firm is willing to pay on behalf of the attorney. Access to Justice and IOLTA information is also collected about your firm. Once you have made your selections click **Save and Continue to Build Roster.** You may return at any time to the Payment Options page by clicking **Payment Options** in the header.

- 1. **Payment Selection Options** Attorneys are required to pay membership dues each year to remain in good standing. Attorneys are also required to pay the legal services fee each year, *unless they are eligible for an exemption* (see legal services fee exemptions below). Membership dues and legal services fees are pre-selected since they are required fees. If the legal services fee is unchecked and no exemption is selected, the attorney will be responsible for paying the legal services fee before the suspension date, to remain in good standing.
- 2. Legal Service Fee Exemptions Attorneys are required to pay the legal services fee, unless they are eligible for an exemption for the entire fiscal year (June 1 May 31). Please select the appropriate exemption below, if all attorneys in your Firm or Agency are eligible for the same exemption.
- 3. Access to Justice (ATJ) Contribution The Supreme Court of Texas asks that attorneys affirmatively opt out if they do not wish to make the ATJ contribution. Firm billing coordinators are required to confirm that each attorney has been contacted about the ATJ contribution.
- 4. **IOLTA** Firm billing coordinators are asked to verify that their firm has an IOLTA account listed with the Texas Access to Justice Foundation, or that their firm or agency does not handle client funds in Texas. The State Bar of Texas collects this information on behalf of the Texas Access to Justice Foundation.

1. Payment Selection Options:

Select which items should appear on the invoice. Attorneys are required to pay membership dues each year to remain in good standing. Attorneys are also required to pay the Legal Services Fee each year, *unless they are eligible for an exemption* (see Legal Services Fee Exemptions below). Membership dues and legal services fees are pre-selected since they are required fees. **If the Legal Services Fee is unchecked on the invoice, and no exemption is selected, the attorney will be responsible for paying the Legal Services Fee before the suspension date, to remain in good standing.** NOTE: A \$150 Access to Justice contribution will appear on the firm's preliminary invoice for each attorney. Access to Justice contribution amounts can be revised on the Invoice page. However, firm billing coordinators are able to remove, or change the amount of, the Access to Justice contribution in the Invoice portal, before approving the final invoice.

Payment Options (select all that apply)

- Membership Dues
- Legal Services Fee (Mandatory, unless eligible for an exemption)
- Section Dues

2. Legal Services Fee Exemptions:

Attorneys are required to pay the Legal Services Fee, unless they are eligible for an exemption for the entire fiscal year (June 1 - May 31). Please select the appropriate exemption below, if all attorneys in your Firm or Agency are eligible for the same exemption. If different exemptions apply, please contact the Membership Department at 800-204-2222 ext. 1383. If an attorney is on Inactive status or they have an MCLE non-practicing exemption on their record, they are automatically exempt from the Legal Services Fee, and no Legal Services Fee will appear on the invoice for that attorney.

Our attorneys are exempt from paying the Legal Services Fee, because they are (select only one):

- No Exemptions
- O Full or Part-Time Judges (Federal, State, County, City)
- Federal or State employees
- Employed by City, County, and District attorney's office
- Employees of a 501(c)(3) non-profit corporation

3. Access to Justice (ATJ) Contribution Options:

As requested by the Supreme Court of Texas, a suggested \$150 Access to Justice (ATJ) contribution is automatically added to the firm's invoice for each attorney. By making a contribution, attorneys make it possible for many low-income Texans who cannot afford an attorney to get the civil legal assistance they need. The Supreme Court of Texas asks that attorneys affirmatively opt out if they do not wish to make the ATJ contribution. If an attorney wishes to donate a different amount or opt out of the ATJ contribution, firm billing coordinators can change the amount before approving the final invoice.

Firm billing coordinators are required to confirm that each attorney has been contacted about the ATJ contribution. Email templates have been provided to assist with that process. The first template is for firms that pay the ATJ contribution through the Firm Billing Portal. The second template is for firms that do not pay the ATJ contribution for their attorneys. Click here to access the templates.

The Court has also provided a letter regarding the Access to Justice contribution and pro bono. Please share the Court's letter and a letter from the Texas Access to Justice Commission with the firm's attorneys. Click here to access the letters.

Each attorney has been contacted individually regarding the Supreme Court of Texas recommended ATJ contribution.

4. IOLTA:

Firm billing coordinators are asked to verify that their firm has an IOLTA account listed with the Texas Access to Justice Foundation, or that their firm or agency does not handle client funds in Texas. The State Bar of Texas collects this information on behalf of the Texas Access to Justice Foundation. To verify your IOLTA information, go to http://www.teajf.org/attorneys/compliance.aspx. For questions regarding IOLTA accounts or how to check this box, please contact the Texas Access to Justice Foundation at compliance@teajf.org.

□ Our firm has an IOLTA account listed with www.teajf.org or we do not handle client funds in Texas.

Save and Continue to Build Roster

BUILDING YOUR ROSTER

The next step is to build the roster of the current Texas attorneys in your firm. If you participated in Firm Billing last year, your roster will be pre-loaded with the attorneys listed on your Firm Billing invoice last year. You can update your roster by adding any new attorneys or by removing any attorneys who have left your firm.

If you did not participate in Firm Billing last year, you will need to add all of your firm's current attorneys.

ADD ATTORNEY

1. Add Attorney to Roster, click 'Add Attorney'

Attor	ney Rost	er		
Smith & Si To build the firm's then add the attor they will need to r attorney's name, a Return to this pag Add Attorney	mith LLP a attorney roster, click 'Add / mey to the roster by clicking einstate their license before and then click 'Yes' in the po e at any time before finalizing	Attorney' and search for the g 'Add' on the search results they can be added to the fi pp up box. After the firm's at ng the invoice, by clicking th	attorney by first name, last name, firr list. If an Attorney is on suspended si rm's roster. To remove an Attorney fr torney roster has been completed, co le Roster link in the above header.	m name, and/or bar number. Click 'Search' and tatus and not eligible to practice law in Texas, rom the firm's roster, click 'Remove' next to the ontinue to the Invoice Page.
Bar Card	First Name	Last Name	Member Status	Age Exempt

2. In the search form you can search by Name, Firm or Barcard. Enter your search criteria and click Search.

NOTE: Searching by Firm name will only display attorneys who have your firm listed on their profile. If you are having trouble finding an attorney, try entering less information. Searching for just the bar number will provide the best results. If the bar number is unavailable, try searching for the last name and the first initial. To search by firm, try using a partial firm name.

First Name]
Last Name	
Firm	
99999999	
Search	

3. Based on your search criteria your results will be displayed. Once you have confirmed the attorney that you want to add to your Roster, click Add.

arch Resul	lts					
3ar Card	First Name	Last Name	Company	Address	Attorney Status	
19999999	John	Doe	State Bar of Texas	555 Main C Houston TX 78745	Eligible	Add

REMOVE ATTORNEY

If an attorney is no longer with your firm, you can easily remove them from your roster.

1. On the Roster page, find the attorney in question and click Remove. The attorney will no longer be listed as an attorney associated with your firm.

Attor	ney Ros	ster			
Smith & S	mith LLP				
To build the firm's then add the attor they will need to r attorney's name, a Return to this pag	attorney roster, click 'A rney to the roster by clic einstate their license be and then click 'Yes' in the e at any time before find	dd Attorney' and search fo king 'Add' on the search ro fore they can be added to e pop up box. After the firr alizing the invoice, by click	or the attorney by first name, la esults list. If an Attorney is on s the firm's roster. To remove ar n's attorney roster has been co ing the Roster link in the above	st name, firm name, and/or ba uspended status and not eligi n Attorney from the firm's rost impleted, continue to the Invo e header.	ar number. Click 'Search' and ble to practice law in Texas, er, click 'Remove' next to the pice Page.
Add Attorney					
					Attorney count: 2
Bar Card	First Name	Last Name	Member Status	Age Exempt	
99999998	Jane	Doe	Eligible		Remove
99999999	John	Doe	Eligible		Remove

BUILDING YOUR INVOICE

On the Invoice page, you will have an opportunity to view the fees for each attorney, and make changes to Access to Justice contributions and sections payments. Detailed instructions can be accessed by clicking the **'For Complete Instructions'** link.

ACCESS TO JUSTICE CONTRIBUTION

The invoice will automatically include the Texas Supreme Court's suggested \$150 Access to Justice (ATJ) contribution for each attorney. If you do not wish to contribute ATJ for any attorneys, click '**Check to remove suggested ATJ contributions**' and all \$150 contributions will be removed from your invoice. Please note that this checkbox will not remove any customized Access to Justice contribution amounts.

		Che (Th	eck to remove suggested ATJ contributions nis check box will not remove modified ATJ amounts)
Bar Card	Name	Fee Type	Amount Due
99999999	John Doe	Membership Dues	\$235.00
		Legal Services Fee	\$65.00
		Access to Justice	\$150.00 📝

To change a contribution to a different amount, click the Edit icon next to the Access to Justice contribution.

Bar Card	Name	Fee Type	Amount Due
99999999	John Doe	Membership Dues	\$235.00
		Legal Services Fee	\$65.00
		Access to Justice	\$150.00 🗹 🗸

SECTION PAYMENTS

If you selected 'Sections' on the Payment Options page, your invoice will show any section memberships that were on your attorneys' records in the last fiscal year. If the attorney wants to change sections, or no longer wants to be a member of a section you can make changes by clicking **Add\Edit Sections**.

Check or uncheck a section to add or remove them from the Invoice.

Add or Edit Sections for Jane D	oe	×
Section	Amount	•
Administrative and Public Law	\$25.00	
African American Lawyers Section	\$25.00	
Alternative Dispute Resolution	\$30.00	
Animal Law	\$20.00	
Antitrust & Business Litigation	\$20.00	
Appellate Section	\$25.00	
Asian Pacific Interest Section	\$15.00	
	Close	Save

PRINTING AN INVOICE

You can print a preliminary invoice to view the total balance, verify accuracy, and present it to your firm's management/accounting team for approval, if appropriate. On the Invoice page, click **Print Preliminary Invoice** to view your invoice as it currently stands.



The Preliminary Invoice lists each attorney and the items to be paid. All Firm Billing Payments must be made online and the Preliminary Invoice should not be used for payment by check. You can edit your invoice until you finalize and submit payment.

Smith & Smith LLP - 207651

Firm Billing Invoice (June 1, - May 31,)

All firm billing invoices MUST BE PAID ONLINE. Please DO NOT submit a check with this invoice.

This invoice includes membership dues, Legal Services Fees, Access to Justice contributions, and/or section membership dues based on the information provided in the Firm Billing Portal. To make changes to the invoice, go back to the Firm Billing Portal and update the information provided.

If all information on the invoice is correct, finalize and pay the invoice through the Firm Billing Portal invoice page.

Invoice Number: 207651	Invoice D	ate:
Jane Doe - 99999998		
	Membership Dues	\$470.00
	Legal Services Fee	\$65.00
	Administrative and Public Law	\$25.00
	Alternative Dispute Resolution	\$30.00
	Access to Justice	\$150.00
		\$740.00
Mr. Primer Record Tester, I, PHD - 99999999		
	Membership Dues	\$235.00
	Legal Services Fee	\$65.00
	Access to Justice	\$150.00
		\$450.00
	Grand total for Firm Smith & Smith LLP	\$1,190.00

FINALIZE INVOICE AND PAY

Once your invoice is correct and you are ready to make payment on behalf of your firm, click **Pay Invoice**. After your invoice has been finalized you will no longer be able to make changes.



You will be asked to confirm that you are ready to submit payment. Click **Pay Now** to continue to the payment page.



MAKING A PAYMENT

Once you have clicked Pay Now, you will be able to submit a payment by Electronic Funds Transfer (electronic check) or by Credit Card. If you choose a credit card, a \$5 processing fee will be added to the payment amount, for each attorney on your invoice. This fee partially offsets transaction fees that the State Bar of Texas is required to pay its credit card processor. There will be no additional charge for Electronic Funds Transfer.

The total due is listed on the right, this total matches what is on your invoice.

PayPal is our payment processor for credit card and EFT/ACH payments. If you believe the Firm's bank may not allow the EFT/ACH transaction to go through, please provide the bank with all three of PayPal's **Originating Company ID Numbers** for ACH transactions: 1770406822, 3770406822 & 2770406822.

Pay Fees		
Smith & Smith LLP		
ubmit payment for all attorneys on your invoice. Credit Card payments will include a \$5.00 fee for each at	orney on the firm	billing invoice.
	_	
Payment Information	📕 Paymen	t Amount
ayment Type*	Total Due	\$600.00
Electronic Funds Transfer 🗸 🗸		
ccount Holder or Firm Name*		
couting Number* 😯		
ank Account Number* 🔞		
ccount type*		
Checking V		
Back to Invoice Submit Payment		

Under Payment Type, select Electronic Funds Transfer or the type of credit card you wish to use. Complete the remaining payment information and click **Submit Payment** to complete the process.

Payment Type*	
Electronic Funds Transfer	
American Express	
Discover	
MasterCard	
Visa	

Congratulations you have completed the Firm Billing process for your firm!

You can come back at any time to print a final invoice for your records.