

**Web Address:** <https://www.ocbar.org/LRISportal>

Your login credentials for the online portal are the same credentials that you would use to login to the OCBA website. If you have forgotten or don't know your login credentials, please visit: <http://www.ocbar.org/PasswordRetrieve.aspx>.

## Purpose

The OCBA Lawyer Referral & Information Service has developed an online control panel that will allow members to better manage the referrals that they receive from the OCBA. This system will give members real-time access to their referrals and allow them to complete many of the tasks that could previously only be done by OCBA staff or by mailing in forms and documents.

## Welcome Section

The welcome section contains the following pieces of information.

- Panelist name
- The username of the person logged in (*unless the panelist has a special message from LRIS staff*)
- Special messages from the LRIS staff (*if applicable*)
- Lockout alert (*if applicable*)

## Monthly Reports

On first day of each month, you will receive notification if you have pending referrals from the previous month or earlier with an “Undefined” status. These will appear under the heading “! Urgent Items Needing Attention.” The status of these referrals must be updated from “Undefined” to an “Open” or “Closed” status. The monthly report alert on the home screen will go away once you no longer have undefined referrals from the previous month.

## Quarterly Reports

On the 15th day of the first month of each quarter you will get a notification that your quarterly reports are due (*i.e. January 15th, April 15th, July 15th, October 15th*).

The quarterly reports consist of any referrals with an open status from the previous quarter or earlier. These updates are performed so that your open referrals can be reviewed for accuracy. In order to fulfill these reporting requirements, you will need to access the referral and “verify” that the referral is still in an “Open” status and pay any forwarding fees that may be due to the LRIS program. If a referral appears on your quarterly report that is no longer active, you will need to update it to a “Closed” status. The quarterly report alert on the home screen will go away once you have entered into the referral edit screen and verified that the referral information is correct and that any forwarding fees have been paid.

## Forwarding Fees

Forwarding fees can be paid at any time by simply accessing the referral that generated the fees. Your referrals can be accessed through the “Referral List” link under the “LRS for Panelists” heading or when performing your Monthly or Quarterly updates.

🔗 [LRS for Panelists](#)

[Referral List](#)

To add a forwarding fee to one of your referrals:

- Access the referral.
- Scroll to the bottom of the Referral Info screen and click on the button labeled “Add Referral Payment.”

Add Referral Payment

- Enter the fees that you were paid by the client into the box labeled “Client Fees Paid to Attorney.” Once this box is populated, the field below labeled “Forwarding Fees Paid to LRIS” will automatically be populated with 15% of the amount that you entered into the “Client Fees Paid to Attorney” field.
- You will be charged the amount shown in the field labeled “Forwarding Fees Paid to LRIS.”

Client Fees Paid to\* 1000  
 Attorney  
 you will be charged  
 This amount  
 Forwarding Fees Paid to 150.00  
 LRIS

- At this point you have two payment options: “Pay Now” or “Create / Update Invoice & Pay Later”. If you choose to pay by check, you will need to send in your payment along with either a printed copy of the invoice or the confirmation that you received after choosing “Create / Update Invoice & Pay Later”.
- Anytime you choose “Create / Update Invoice & Pay Later” as a payment option you will have an open, unpaid invoice that should have payment remitted within seven business days.
- You can also use the **shopping cart** to pay multiple forwarding fees in one online transaction. In order to add a referral fee to the shopping cart you need to select the “Create / Update Invoice & Pay Later” option during payment. Once you have entered all of your forwarding fees and selected the “Create / Update Invoice” option for payment, go into your transaction history using the “Transaction History” link on the home page. Select the invoices that you want to pay and add them to the cart. There will also be an option to add the invoice to the cart on the confirmation page immediately after you select “Create / Update Invoice & Pay Later” as a payment option.

## Renewing Dues

To renew your LRIS dues, simply click on the “Renew Dues” link that appears under the “! Urgent Items Needing Attention” section.

Note: The renew dues link will only appear after renewal invoices have been generated by the OCBA. This typically occurs in December of each year.

## Update Panelist Preferences

In this section you can do the following:

- **Profile Information**  
View/edit your profile information including your name, address, phone number, etc.
- **Program Information**  
View your program information. This will allow you to see the panels to which you are currently subscribed.
- **Upload Documents**  
Documents can be uploaded here to be retrieved by LRIS staff. Once a document is uploaded, it will remain available and can be accessed later.