

OREGON ASSOCIATION OF TAX CONSULTANTS

MEMBER WEBSITE USER GUIDE



Current Version 06.19.17

Dear Fellow OATC Member,

The Technology Committee has worked long and hard to bring this membership software to OATC and it's members. This User Manual is an attempt to make this technology easier for everyone to use. This is a work in progress, as we are all learning new applications and techniques in working with our website.

You will notice Video Tutorials throughout the software. Feel free to view any and all of these you wish. They will certainly have more information than this document does.

Please contact one of the members of the Technology Committee with feedback or questions. Our information is listed at the bottom of the welcoming letter, which is duplicated under "Initial Login". Thank you for being willing to participate in doing your part in making OATC a GREAT organization.

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MEMBERS

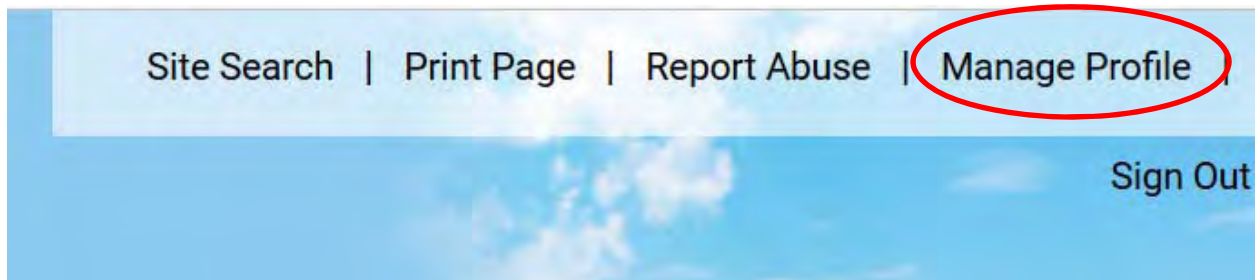
INITIAL LOGIN

The member will initially receive a welcome letter. It will look like this:

THIS WILL BE A PLACE WHERE A SAMPLE WELCOMING LETTER WILL BE POSTED. WE HAD ONE EARLIER FOR THE ROLLOUT OF THE NEW WEBSITE TO HELP EXISTING MEMBERS LOG IN. NOW THAT WE ARE BEYOND THAT POINT' WE NEED TO DEVELOP A MORE EFFECTIVE LETTER.

EDIT USER NAME

Now that you are in the site, go to the top of the page, click on “Manage Profile”




A new window opens, click on “Edit Bio”

Manage Profile

 Profile Home

INFORMATION & SETTINGS

 **Edit Bio**
Update your information and choose privacy settings for individual fields.

If you wish to change your login (Username), simply click on (change) following your current Username. This window appears:

Change Username

Please enter the new username you would like into both fields, as well as the password that is currently assigned to your account (for verification.)

Enter your new username:

Confirm your new username:

Verify your password:

SUBMIT

Do not change username

Enter what you have chosen for your new Username in the two boxes titled “Enter your new username:” and “Confirm your new username:”. Usernames must be alphanumeric (contain only letters and/or numbers) and at least 4 characters in length. You may alternately use a valid email address as your username. The password remains the same as it was before. Click “Submit”.

Now, your new Username will show on your profile.

Do NOT change your “Full Name”. It is vital your full name matches the IRS records. This is the information we use to post your education certificates.

Scroll down to the bottom of the screen and click on “Save Changes”.

SAVE CHANGES **CANCEL**

Remember this step, so your changes will be made.

CHANGE PASSWORD

Click on the (change) after Password. This window appears:

Change Password for Mrs. CATHY A JOHNSON

Please enter the new password into both fields. The new password must be a minimum of eight (8) characters in length and contain at least one number and one non-numeric character (letters, punctuation, etc.)

Your new password:

Confirm your new password:

Do not change password

Just enter your new password into both windows. The password must be a minimum of eight (8) characters in length and contain at least one number and one non-numeric character (letters, punctuations, etc.).

Click on Submit.

Scroll down to the bottom of the screen and click on "Save Changes".

Remember this step, so your changes will be made.

PLAY WITH THE REST OF YOUR "EDIT MY MEMBER PROFILE" PAGE

Here are some of the fun things you can do in this area, which is below the "Account Information" area where we just worked on the User Name and Password.

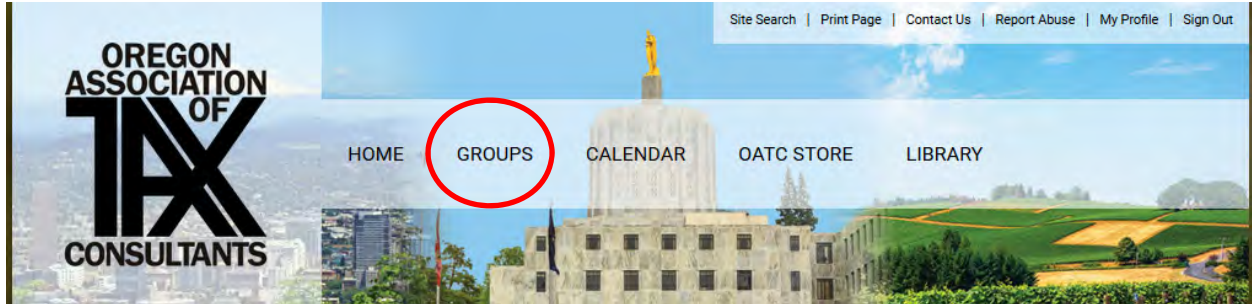
ACCOUNT INFORMATION

some things are required, some are not, some are for public viewing, others aren't

Keep your e-mail address current, Insert a photo, Spouse's name, Marital status, Anniversary date, Birthday, Website, Address, phone number, Organization, and so on. When you are done, ALWAYS click on "Save Changes":

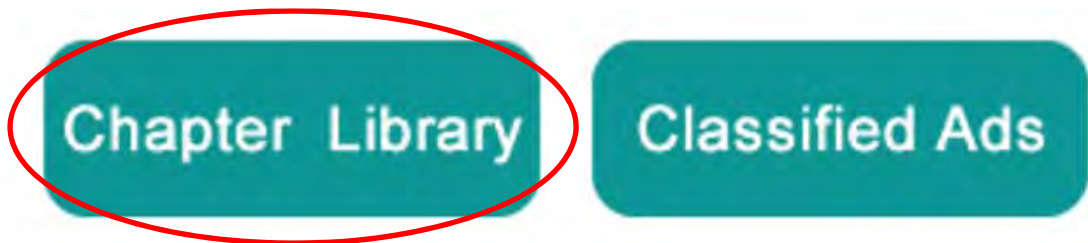
FINDING CHAPTER INFORMATION

Click on “Groups”, then “Chapters”

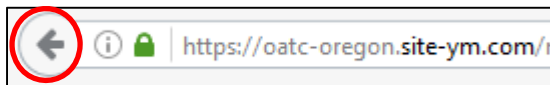


By going to the Chapter page, you may see photos posted by your chapter officers, members' information under Group Directory, education events under Calendar, Chapter information, and a list of your chapter officers.

When you click on “Chapter Library” you will find Education materials, chapter newsletters, state newsletters and other interesting things.

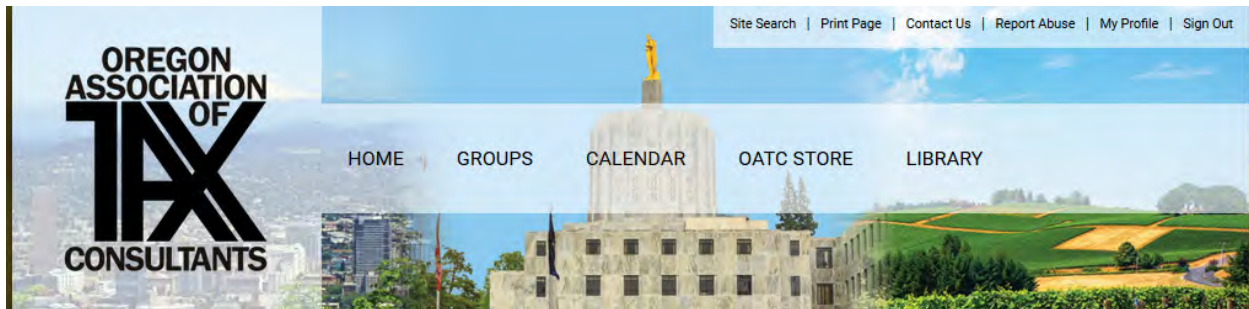


As you explore the site, just click the back arrow to return to the previous page. This is located in the upper left-hand area of your screen.

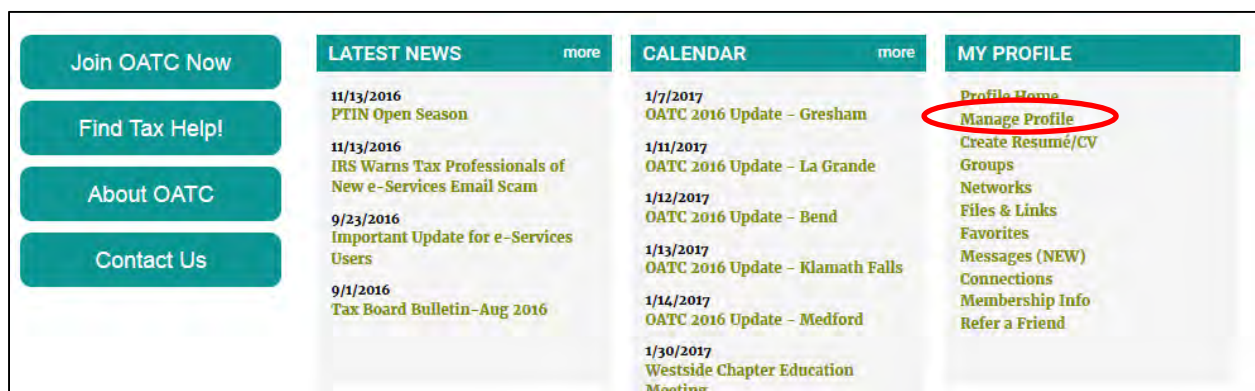


FIND YOUR EDUCATION CERTIFICATES AND INFORMATION

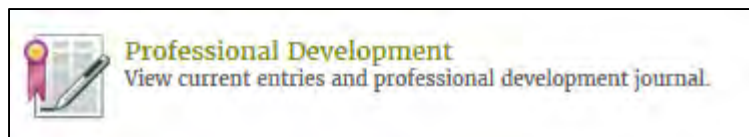
Go to the Home Page



Then move to the lower right portion of the page to the My Profile section:



Click on Manage Profile, and scroll down to Professional Development



Here is a listing of your completed classes. Do not be concerned if some of your classes show “No Certification Selected”. Your credit hours earned are shown in the “Credits” column. We have changed this, but some of the earlier credits awarded have this designation. The second line of each class shows the name of the class. In order to printout your certificate, just click on the printer located to the left of the class:



An education certificate will appear and you can print from there.

While you are still in this Professional Development section, Click on “Print Transcript”. This provides you with a printout of your classes. This report can be filtered by entering

dates into the From and To boxes. It is best to use the little calendars so the system recognizes the dates properly.

Here is an example of what it looks like.

Member Information			
CATHY JOHNSON 175 Highway 82 Lostine, Oregon 97857 United States		Oregon Association of Tax Consultants 3075 SW 234th Ave, Ste 110 Hillsboro, Oregon 97123	
TRANSCRIPT			
of continuing competency units earned by CATHY JOHNSON			
Activity Code	Date Earned	Description	Credits
707SO-T-00385-16-I	8/11/2016	Attended Event: Rendezvous <i>(Approved)</i>	12
707SO-T-00369-16-I	8/3/2016	Attended Blue Mt Educational Credits Course <i>(Approved)</i>	2*
707SO-T-00367-16-I	6/9/2016	Attended Event: Blue Mt Health Savings Accounts <i>(Approved)</i>	2
707SO-T-00361-16-I	5/20/2016	Attended Event: Blue Mt Military Class <i>(Approved)</i>	3
707SO-T-00360-16-I	5/20/2016	Attended Event: Blue Mt Tic Tax Toe Class <i>(Approved)</i>	2
707SO-T-00359-16-I	5/20/2016	Attended Event: Blue Mt Closing An S Corp Class <i>(Approved)</i>	2
707SO-T-00358-16-I	5/17/2016	Attended Event: Ble Mt Chapter Panel Discussion <i>(Approved)</i>	2
*Journal entry was self-awarded.			
Total Credits Earned:			25