PRIVILEGED
MEMBER

MEMBERSHIP SUITE USER GUIDE

For any questions about this User Guide or the Membership Suite, please contact: membership@pli.edu

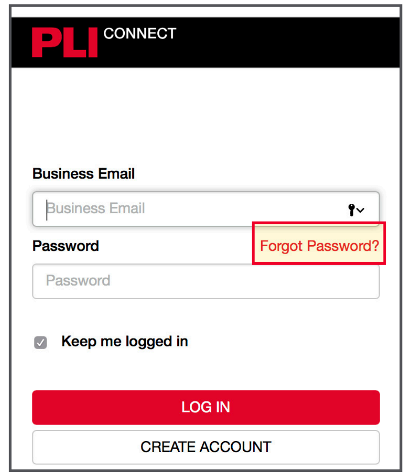
Introduction & Access

Introduction

PLI Privileged Members use Membership Suite as a centralized location for account management and administrative tasks.

Log in to your account for the first time (or reset password):

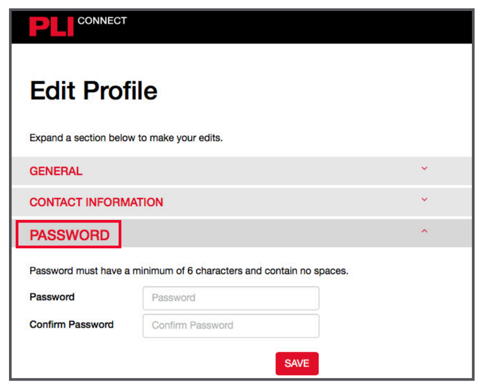
1. Go to **www.pli.edu** and click **“Sign In”** in the upper right corner.
2. Click the **“Forgot Password”** link.
3. Enter your business email and a reset link, and temporary password will be sent to you automatically.
4. Check your email for the temporary password and follow the link provided.
5. Log in with your business email and temporary password. Create a new password and click **“Submit”** to log in.



My Account

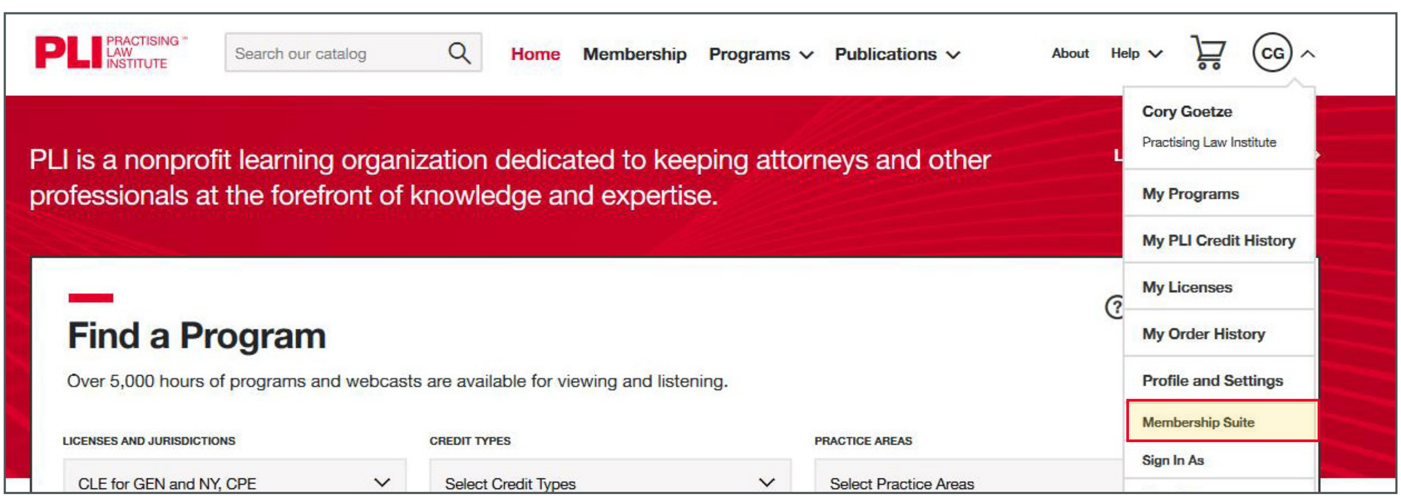
Changing your password

1. Scroll over **“My Account”** and select **“Edit Profile”** from the drop-down menu.
2. Click **“Password”**.
3. Enter your new password with a minimum of six characters and no spaces.
4. Click **“Save”**.



Access

Scroll over **“My Account”** and select **“Membership Suite”** from the drop-down menu to be taken to the Membership Suite Home Page.

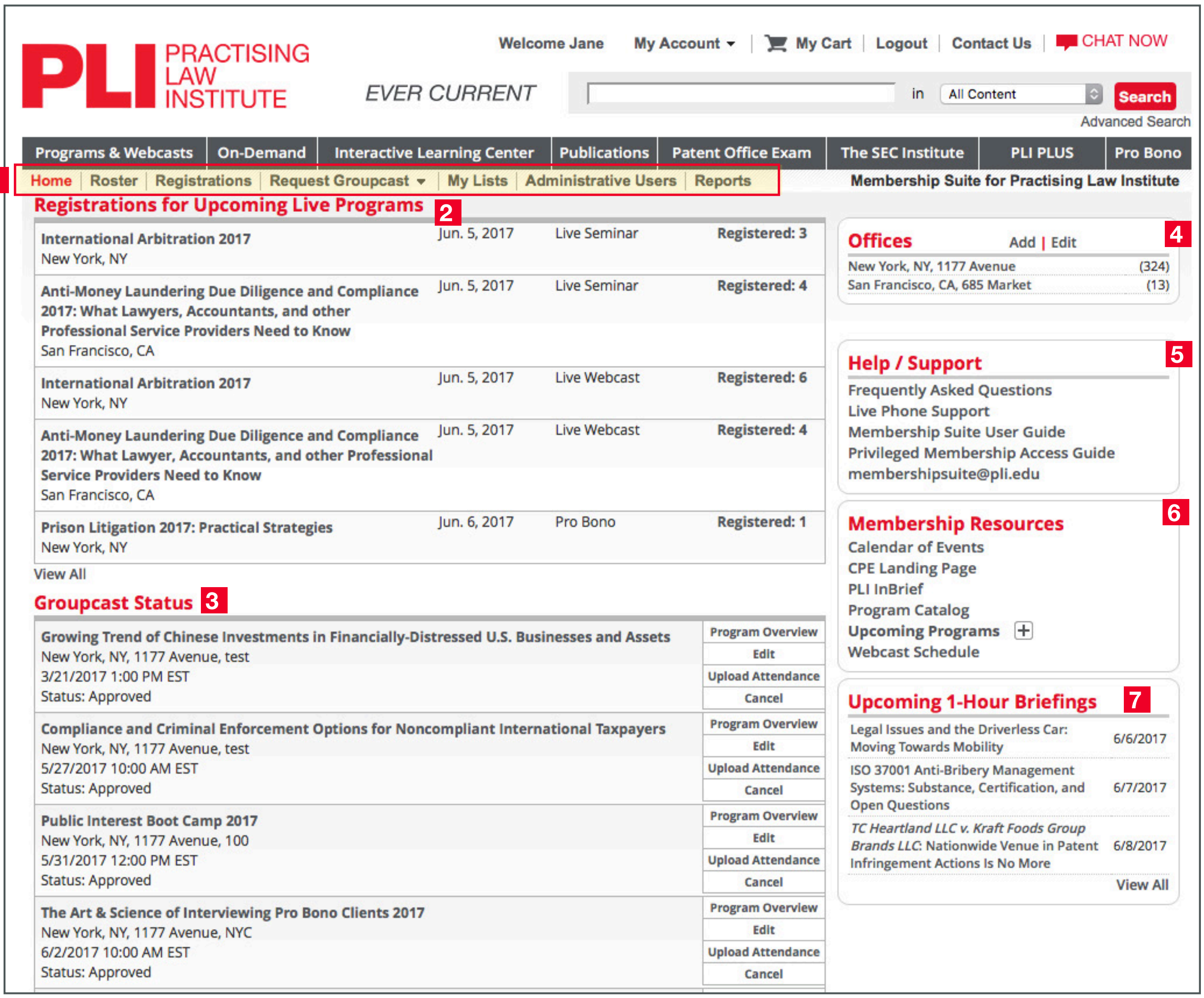


Membership Suite Home Page

The **Membership Suite Home Page** provides a wide range of administrative tools, program overviews, upcoming events and helpful resources in one centralized portal.

From here, you can:

1. **Manage** your Privileged Membership using the administrative tool bar
2. **View** your upcoming registrations
3. **View** the status of your Groupcasts
4. **Manage** an editable list of office locations
5. **Use** quick links to PLI support, FAQs and User Guides
6. **Explore** helpful membership resources, schedules and catalogs
7. **View** upcoming 1-Hour Briefings

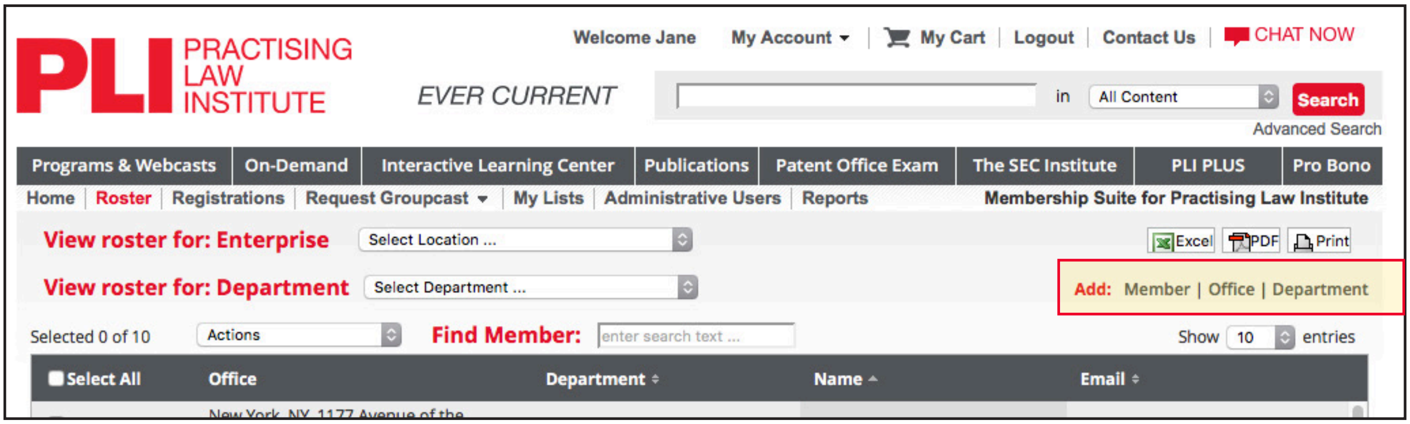


Roster Management

Administrators can manage and edit their organization's Privileged Membership roster from this area. All changes are reflected immediately, allowing instant access to new individuals .

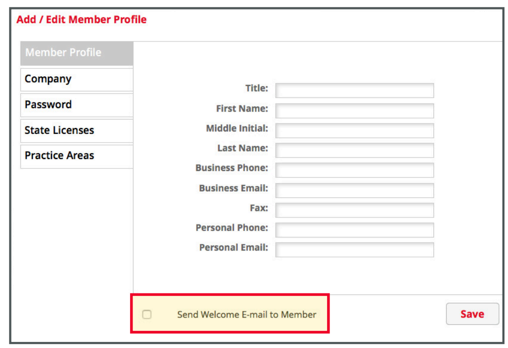
Adding to Your Roster

Three options are available under the **"Roster"** tab:
Add Member, Add Office and **Add Department**.



Add Member

The **Add/Edit Member Profile** pop-up screen allows you to add individuals to your roster, select their office location, create/change their password, add state licenses and identify their practice areas.

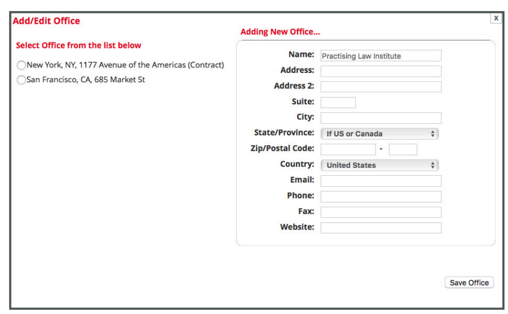


Send Welcome Email

Please remember to check the box indicating **"Send Welcome E-mail to Member"** introducing their benefits as a PLI Privileged Member, and providing them with their login credentials and account setup instructions.

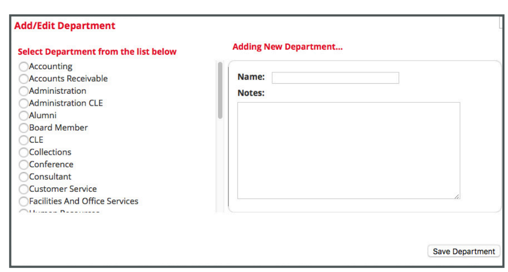
Add Office

Under **Add Office**, you can view your organization's current list of offices and add new locations.



Add Department

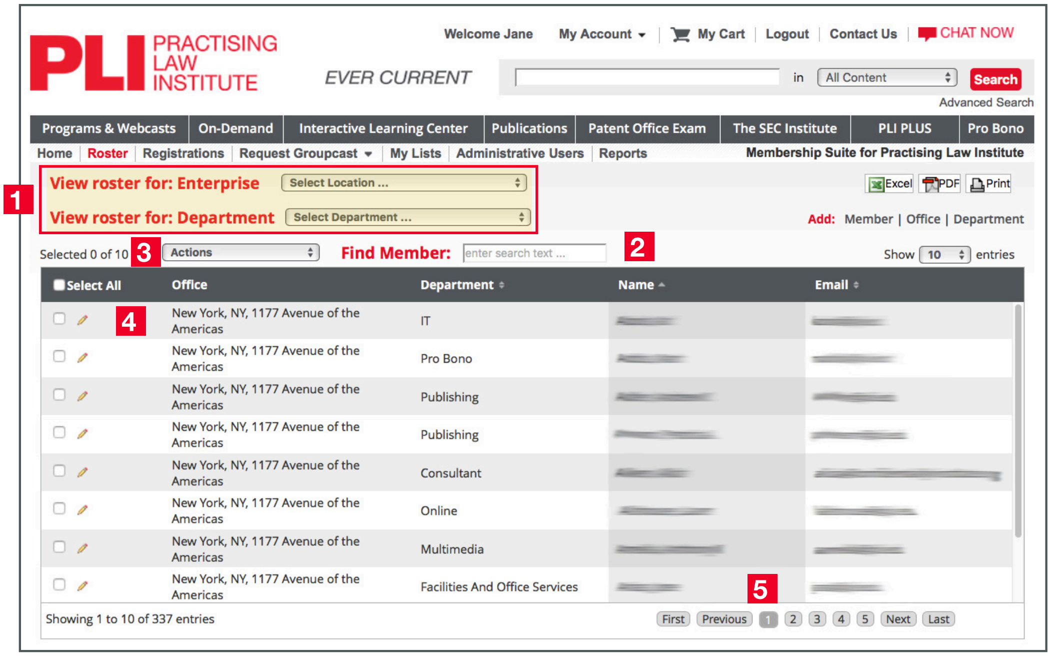
The **"Add Department"** pop-up helps you add new departments or edit existing departments to reflect your organization's internal structure.



Manage Roster

The Roster home page shows a full list of your organization's current members.

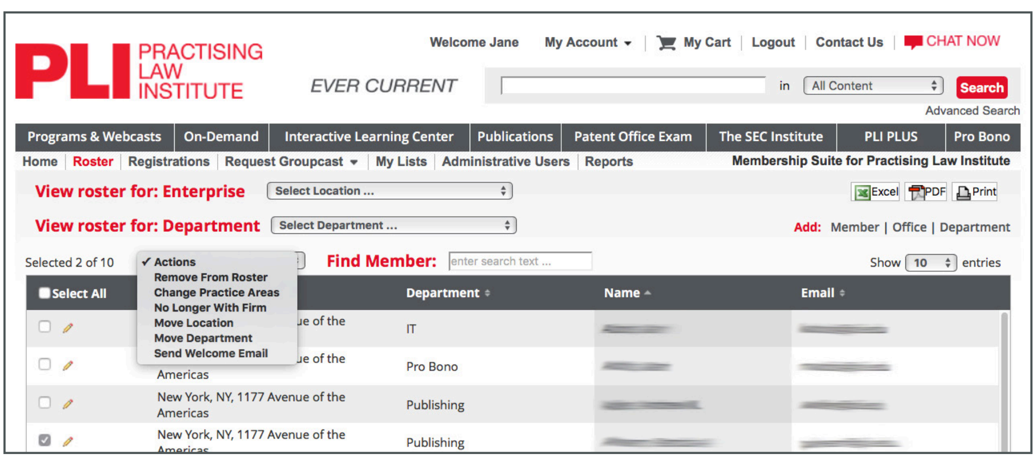
1. The list can be narrowed down by Enterprise or Department.
2. Use the **"Find Member"** functionality to find specific individuals.
3. Select actions from the drop-down menu to edit multiple individuals simultaneously.
4. Select all or some roster individuals using the check mark boxes.
5. Browse the entire roster list.



Editing Multiple Users

The Roster page can be used to edit multiple individuals at once by selecting the specific members with check marks and choosing an option from the **"Actions"** drop-down menu:

- Remove users
- Change users' practice areas
- Change users' office locations and departments
- Send PLI Welcome Emails



Program Registrations

Creating and Modifying Registrations

The Registration page can be used to access existing registrations and create new registrations for upcoming programs.

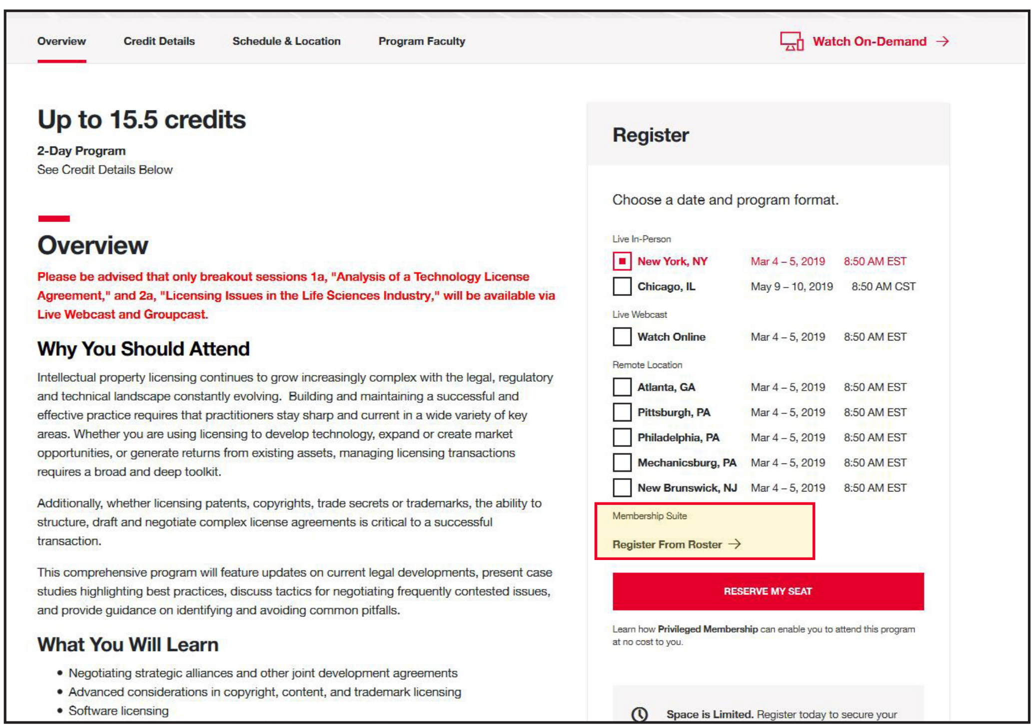
Registration Queue

1. **Displays** your current registrations for all future programs
2. **Provides** links for viewing each program's overview page
3. **Allows** you to view additional information on current registrations
4. **Enables** additional registrations directly from the roster

Registering from Program Pages

Registrations can also be made from any program page. Click the title of the program you are interested in to reach its landing page, where additional information on the Program is provided.

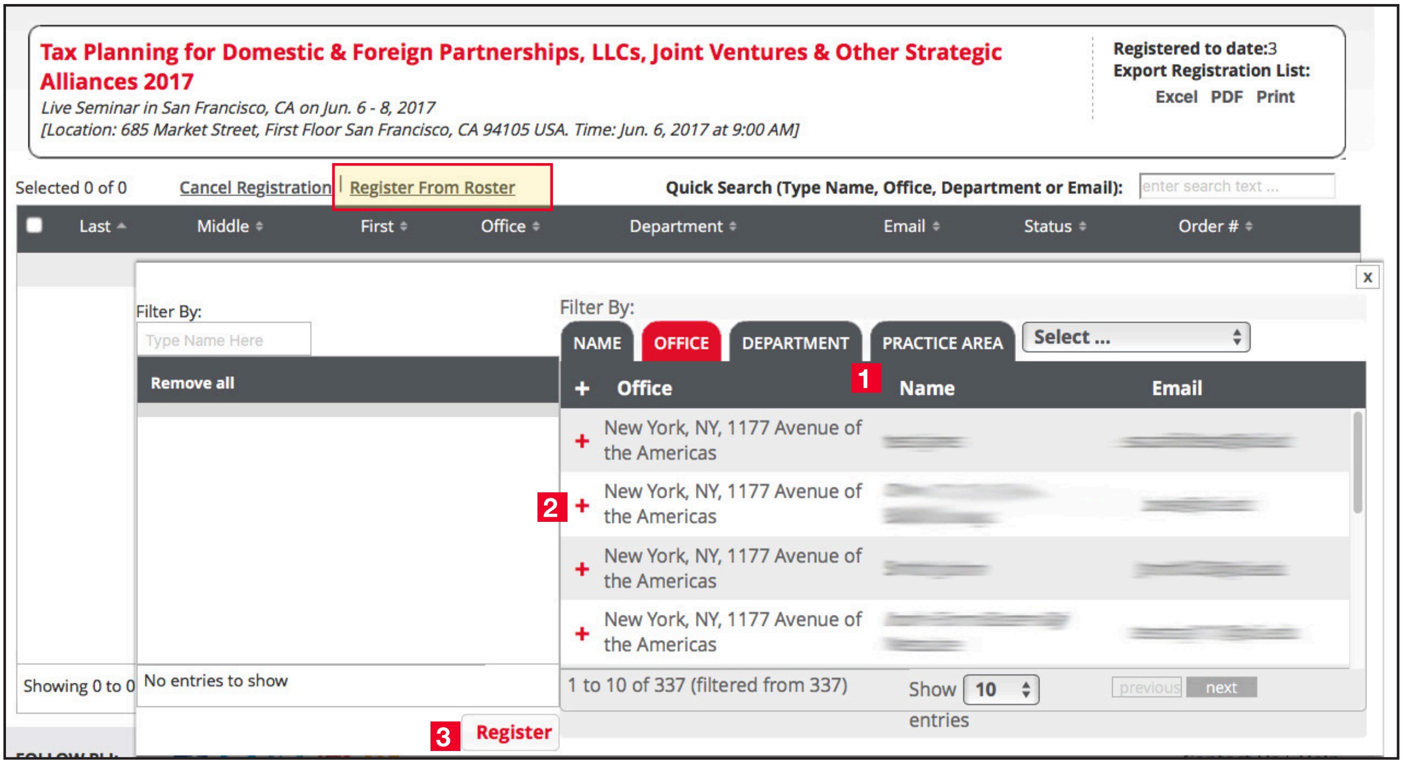
- **"Register From Roster"** will bring you to the list of current registrations for the program.



Registering Individuals

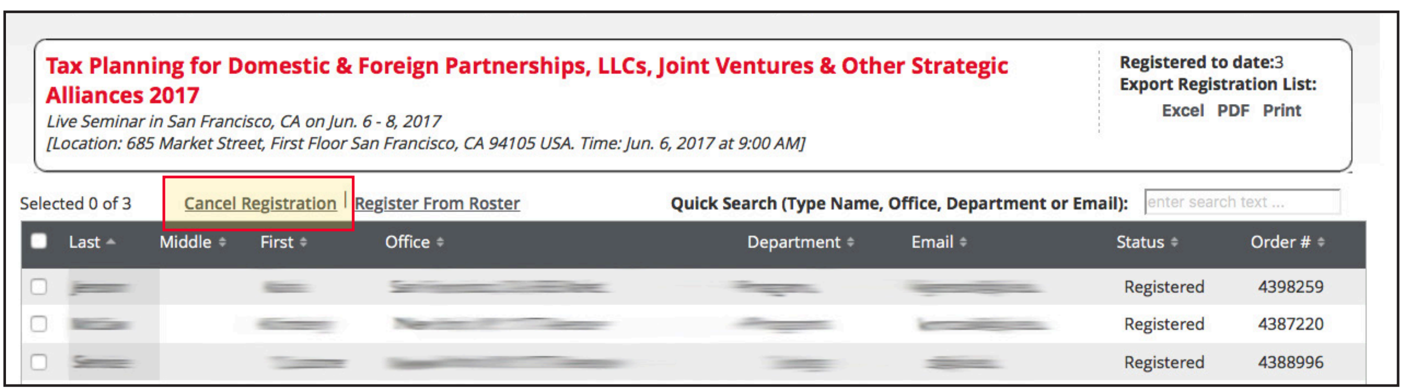
Click **"Register From Roster"** and a registration pop-up will appear.

1. Search for members by name, office, department or practice area
2. Select individuals by clicking the red plus sign to the left of their rows
3. Click **"Register"** to add them to the registration list. Attendee will receive a "real-time" email confirmation.



Canceling Program Registrations

Registrations can be canceled at any time by checking the box to the left of an individual and clicking **"Cancel Registration"**. Attendee will receive a "real-time" cancellation email.



Scheduling a Groupcast

Remote Groupcasts – Introduction

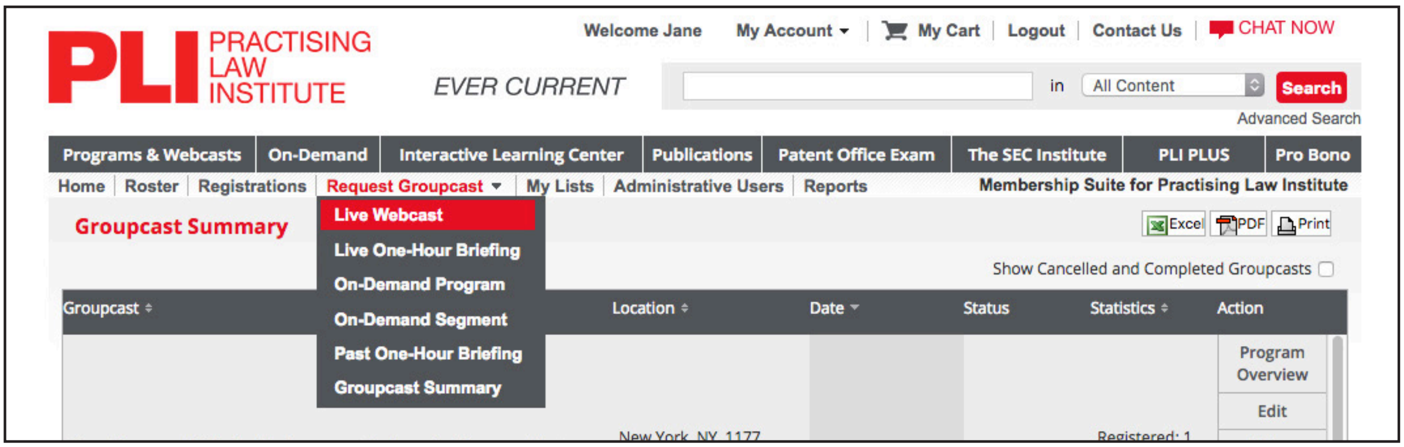
Remote Groupcasts are group viewings of PLI Webcasts or On-Demand Web programs from the convenience of your organization's own location, creating a classroom experience and encouraging participation.

Groupcast Requirements:

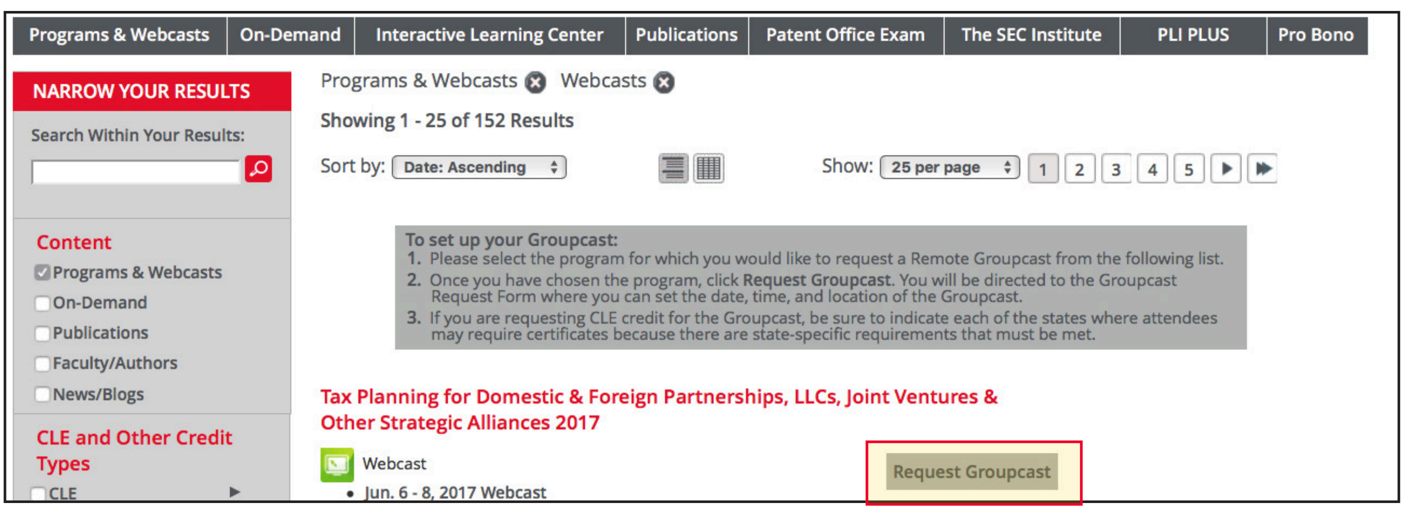
- The Groupcast, for Live programs, must be held **on the date requested**.
- There must be **at least five attendees** for a program to qualify as a Groupcast.
- There must be an **attendance monitor present** at the Groupcast who is not seeking credit.
- Some states require a qualified moderator to be present. **Verify your state-specific requirements**.
- All attendees must **sign in on a single attendance form**. No retroactive additions will be permitted.

Scheduling a Groupcast

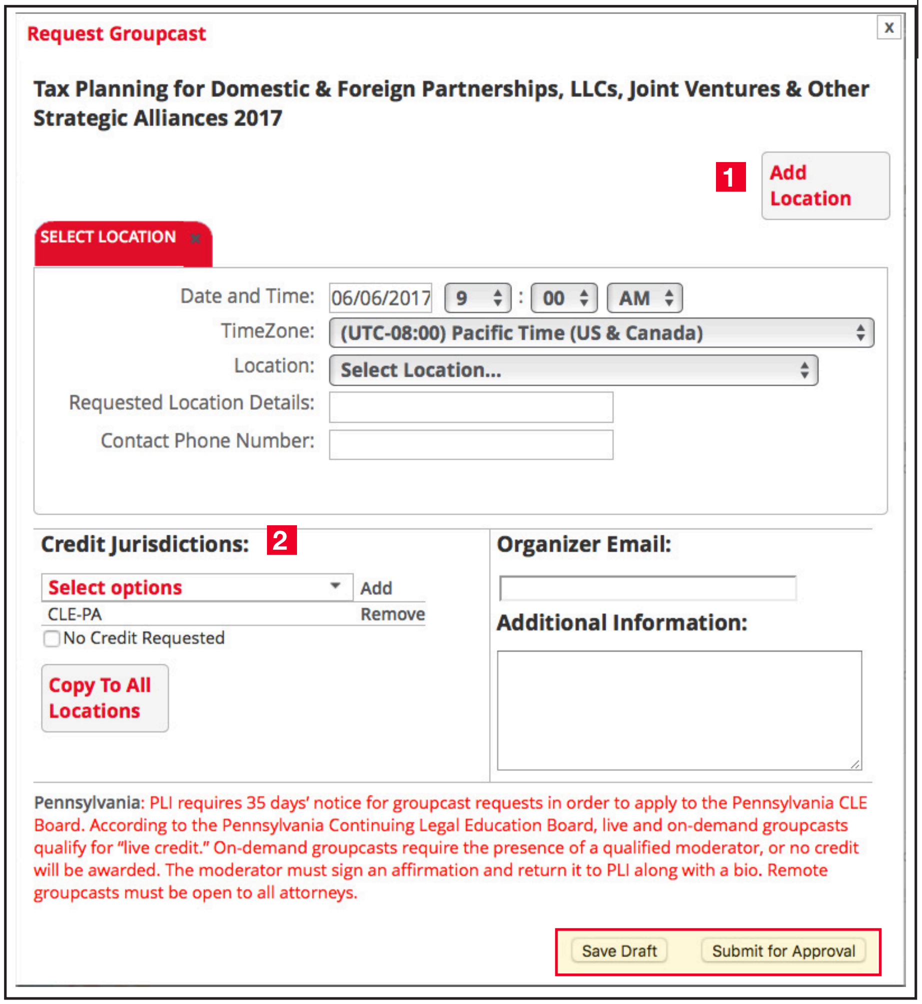
- Select your preferred program format type from the **Request Groupcast** tab drop-down menu.



- Once the search page has opened, select your program from the list or use the filters on the left. Click **"Request Groupcast"**. This may also be achieved by clicking **"Request Groupcast"** from any Webcast or On-Demand Program detail page.



- Complete the **Request Groupcast** form pop-up, including date, time, location, credit types and jurisdictions where seeking credit. Click **"Save Draft"** to continue working at a later date, or click **"Submit for Approval"** for review by the PLI Groupcast Department. You will be contacted directly if further information is required.
  1. Click **"Add Location"** if you plan to hold the Groupcast in multiple locations. Time zones will automatically adjust for live webcasts.
  2. **Credit Jurisdictions:** Select the type of credit and states where your attendees require credit by checking the appropriate boxes from the drop-down menu and clicking **"Add"**. State-specific information will appear at the bottom of the screen.



- The Groupcast organizer will be notified by email once the Groupcast status is updated to **"Approved"**.
  - **On-Demand Groupcasts:** The On-Demand Groupcast email will contain a link to the program, as well as specific instructions for the Groupcast including obtaining credit and accessing Course Materials. A reminder email will also be sent the day prior to the Groupcast.
  - **Live Webcast Groupcasts:** Two weeks prior to Live Webcast Groupcasts, an email will be sent containing the program link and instructions. A reminder email will also be sent the day prior to the Groupcast.

Groupcast Summary

Groupcast Summary Tools

The **Groupcast Summary** page, selected from the Request Groupcast drop-down tab, includes all pending and scheduled upcoming Groupcasts, as well as canceled or completed Groupcasts.

Action tools on the right side of each row enable you to:

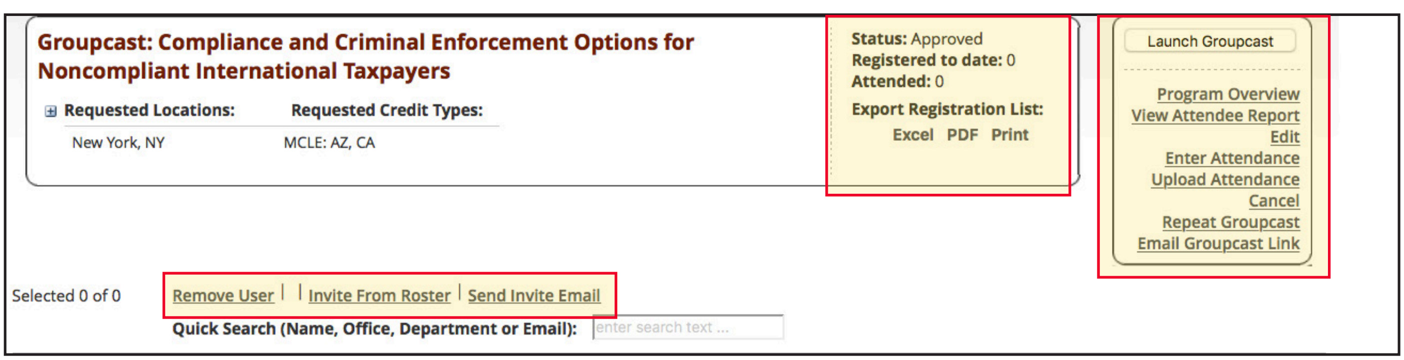
- View the program overview
- Edit your Groupcast Request
- Enter attendance post-program and submit for CLE
- Upload a PDF of the attendance sheet (all attendance sheets and forms may also be sent by email to groupcasts@pli.edu)
- Cancel an upcoming Groupcast

Groupcast Summary

Review a scheduled Groupcast by clicking on the program title.

Options here include:

1. **Export Registration List** in multiple formats to save for your records
2. **Launch Groupcast** opens the link and begins the Groupcast
3. **Groupcast Tools** include:
   - **View Attendee Report:** View saved or submitted registrations
   - **Edit:** Make changes to the registration and attendance
   - **Enter Attendance:** Enter attendance electronically post-program and submit for credit
   - **Upload Attendance:** Upload required documentation for PLI to issue certificates
   - **Cancel:** Cancel requested Groupcast
   - **Repeat Groupcast:** Create another Groupcast of the program in another location
   - **Email Groupcast link:** Send link via email
4. **Registration Tools** allow the removal or invitation of additional attendees.



Day of the Groupcast

At the scheduled time for your Groupcast, open the link from your email or launch the Groupcast from the Groupcast page **(Groupcast Summary > Launch Groupcast)**.

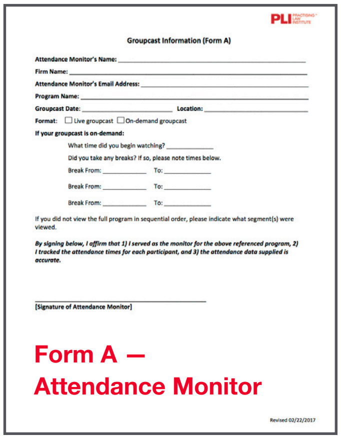
- Required attendance forms can be found on the launched Groupcast link under **"Course Materials"** and **"Request Credit"**. The forms can also be found linked in your confirmation and reminder emails.
- Attendance forms can be submitted via **Membership Suite** or emailed to **groupcasts@pli.edu** for credit to be issued by PLI. All registered attendees must have their status updated (attended, no-show, etc.).

Course Materials

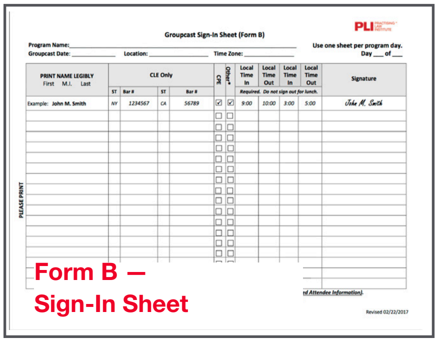
From the Groupcast link, select **"Continue on to the Program"** and click on the **Course Materials** tab in the upper right corner of the window. From here, you can print copies for attendees. Bound Course Handbooks may also be purchased separately by contacting groupcasts@pli.edu.*

Attendance Verification Forms

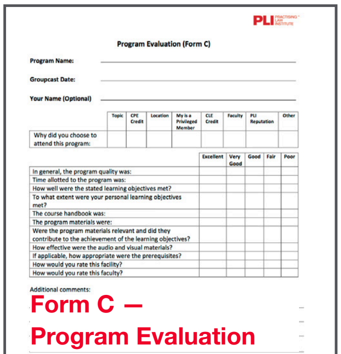
1. **Form A** (Groupcast Information) must be filled out by the Attendance Monitor.
2. **Form B** (Groupcast Sign-In Sheet) must be used by all attendees to sign in and out.
3. **Form C** (Program Evaluation) and **Form D** (Request for Credit) must be completed by each attendee.
4. **Form E** (Qualified Moderator Affirmation) must be completed and signed by a qualified moderator if you are requesting Arkansas, Pennsylvania, Tennessee or CPE credit for an On-Demand Groupcast or Mississippi credit for any Groupcast, as well as including the moderator's bio.
5. Scanned copies of **Forms A–E** must be emailed to **groupcasts@pli.edu** (or uploaded via **Membership Suite**) within two business days of the Groupcast.
6. **No credit will be granted** for attendees who have not signed in/out on the attendance sheet. No retroactive additions are permitted.
7. If taking place in multiple locations, please submit Groupcast attendance forms for all locations at one time via **Membership Suite** or in a single email.


Groupcast Information (Form A)

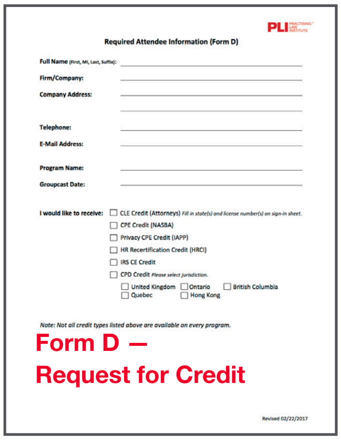
Form A — Attendance Monitor


Groupcast Sign-In Sheet (Form B)

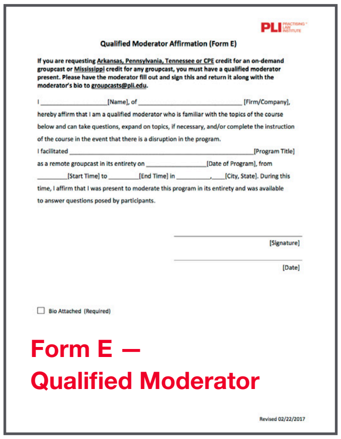
Form B — Sign-In Sheet


Program Evaluation (Form C)

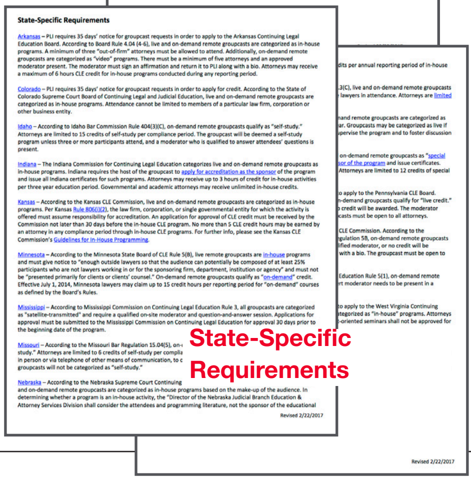
Form C — Program Evaluation


Required Attendee Information (Form D)

Form D — Request for Credit


Qualified Moderator Affirmation (Form E)

Form E — Qualified Moderator


State-Specific Requirements

State-Specific Requirements

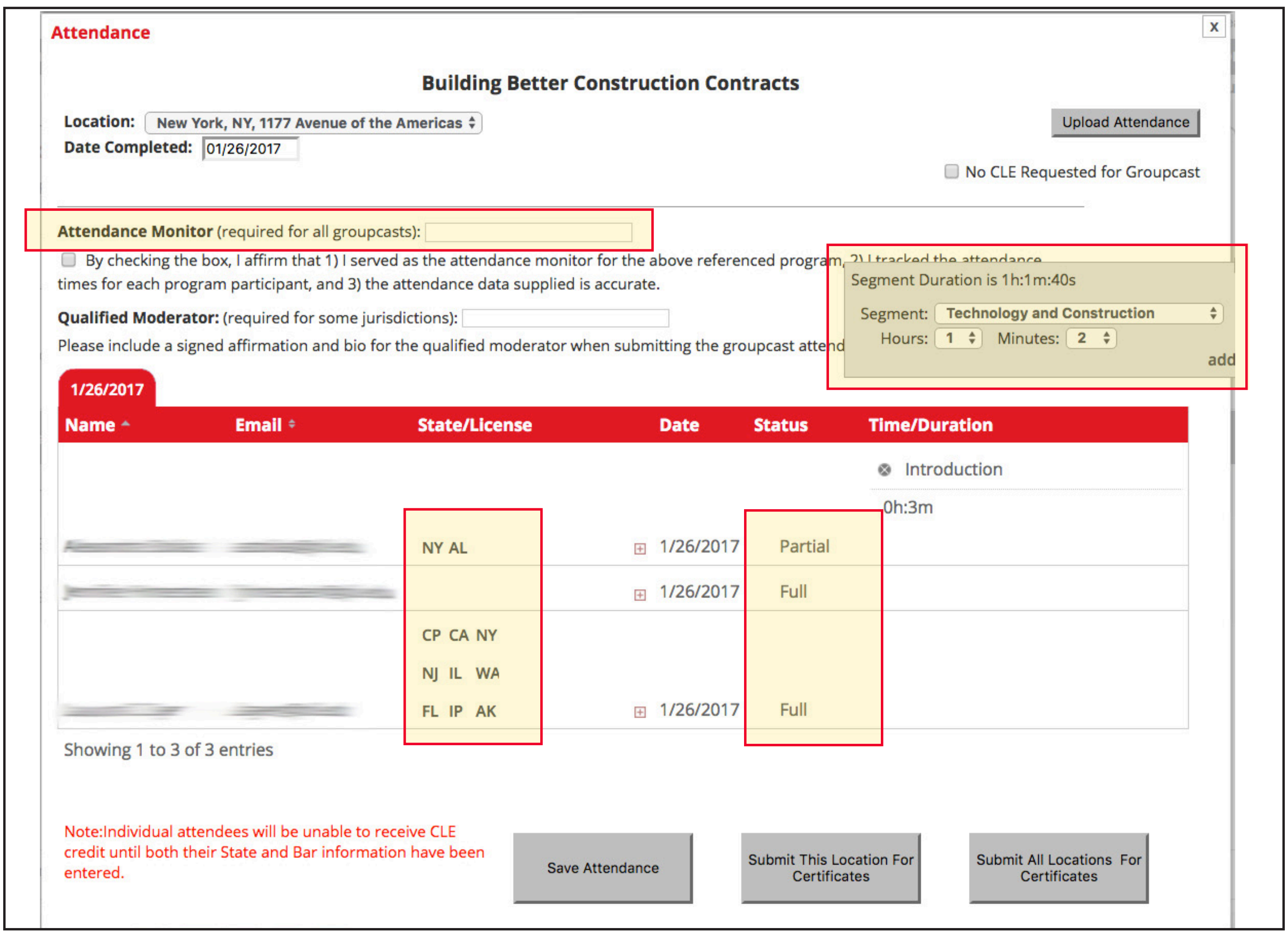
* The course materials and PLI Course Handbook are for the personal use of Groupcast attendees. Distribution of the course materials or individual chapters is strictly prohibited, and receipt of the Course Handbook or individual chapters does not confer upon the recipient(s) any rights to reproduce, distribute, exhibit or post the content without the express permission of the copyright holders. This includes electronic distribution and downloading of materials to an internal or external server or to a shared drive. If you have any questions, or would like to request permission, please contact libraryrelations@pli.edu.

After the Groupcast: Reconciling Attendance

Reconciling Groupcast attendance can expedite the issuing of credits.
We recommend the following steps to facilitate the process:

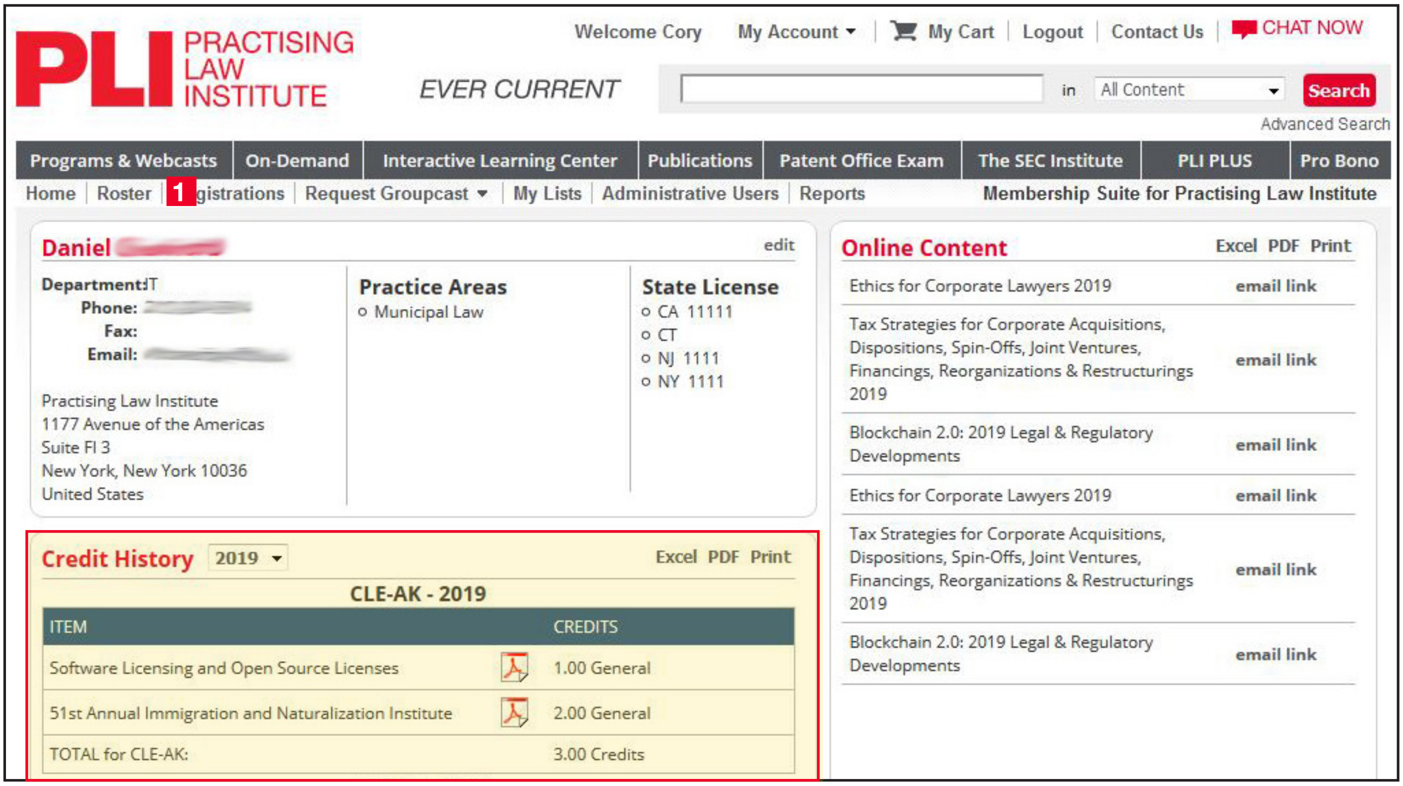
- Register attendees who were not pre-registered:
  - Go to **Groupcast Queue > View > Register from Roster**.
  - Select individuals by clicking the red plus sign to the left of their names, indicate their location (if multiple locations are being held) and click **"Register"**.
- Click **"Enter Attendance"** next to the Groupcast on the Queue page or in the program tools.
  - Enter the attendance for individuals by using the drop-down menu to select **"Full", "Partial" or "Absent"**. **Attendance cannot be uploaded until every attendee has their status entered**.
- For each location, enter the moderator's name at both the top and bottom of the form, and check the box at the bottom of the form.
- Once complete, click **"Save Attendance"** to keep the form as a draft, or **"Submit for Certificates"** to send Groupcast attendance to the PLI CLE department for processing.

NOTE: Once submitted, no further changes can be made.
If changes are required, contact: groupcasts@pli.edu.



Print or Save CLE Certificates:

1. **Click** on Roster
2. **Search** for the individual
3. **Click** on Individual
4. Bottom box will have CLE certificates by year – search click and print or save



From "My Lists" you can:

1. **Create** multiple custom lists of selected programs
2. **Publicize** selected programs to roster members by email
3. **Save** lists by exporting them to the roster
4. **Click** on a program title for more information
5. **Register/remove** members for a program, or request a Groupcast

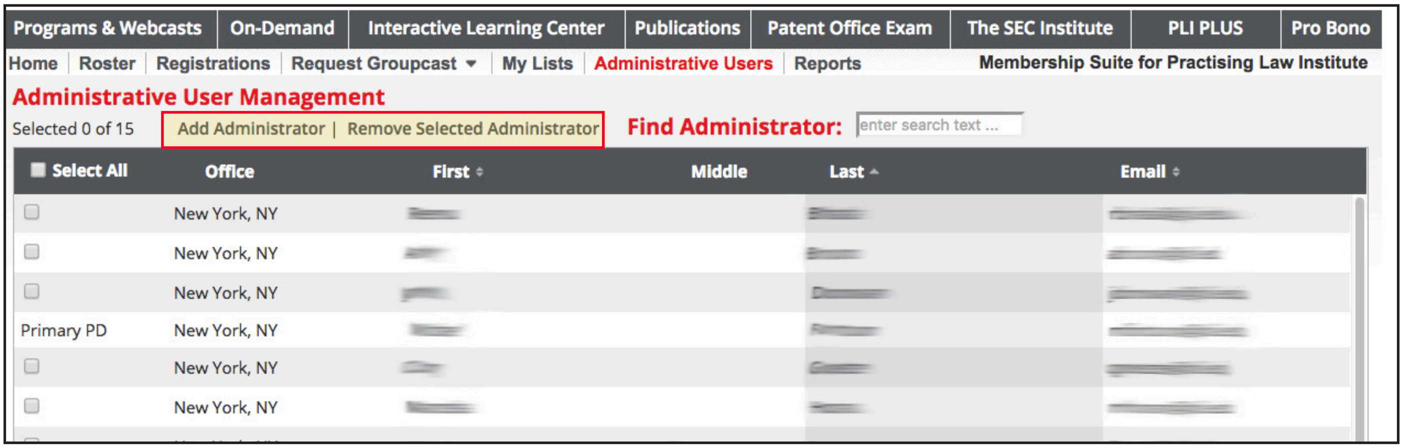
Update Administrative Users

Adding New Administrators

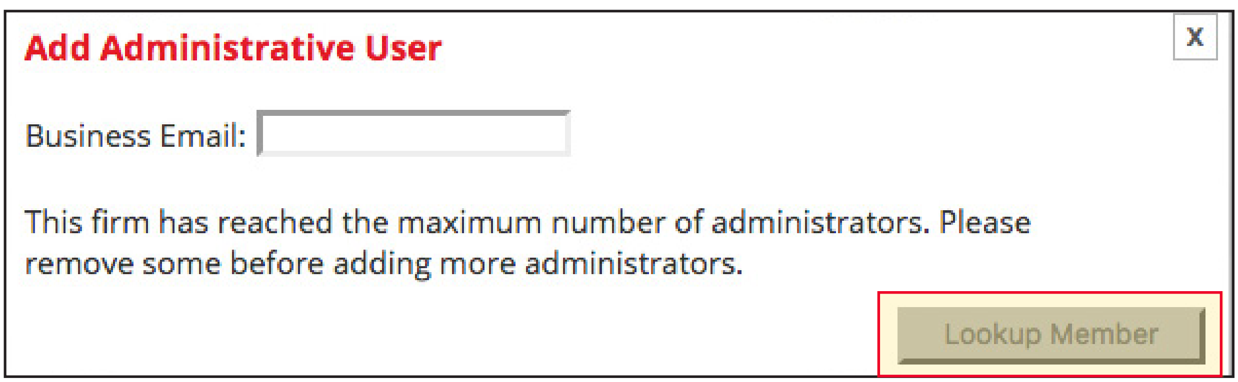
Your account is set up with one individual as the **Primary PD** or administrator. To add **Membership Suite** access for other administrators, click the **"Administrative Users"** tab. Up to 15 administrators may be linked to one Privileged Member organization.

All current administrators will be listed on this page. To add a new administrator from your roster:

- Select **"Add Administrator"** and add the individual's email address.
- Check boxes and select **"Remove Selected Administrator"** to remove any individuals from the list.



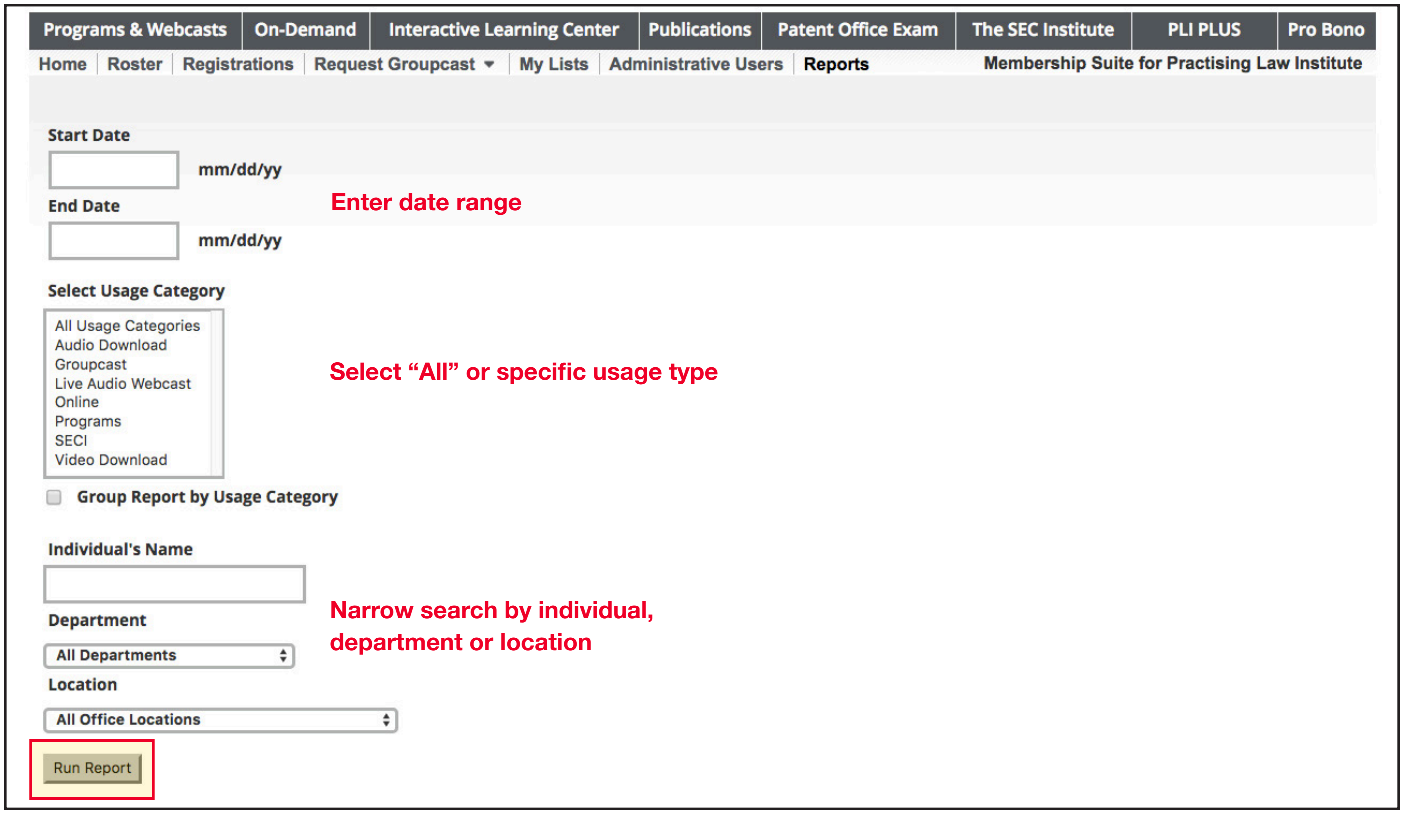
- Use the **"Lookup Member"** functionality to find the email of a new administrator. (Note: The individual must currently appear on the roster.)



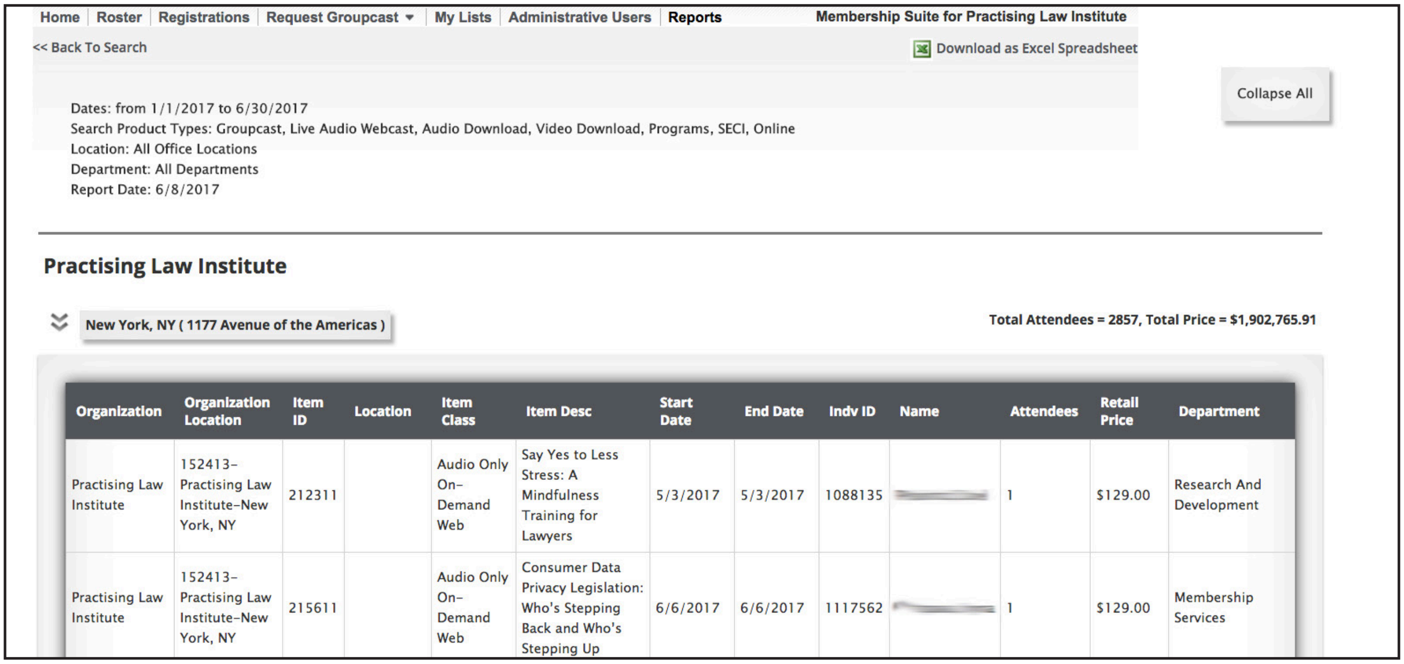
Reports

Attendance reports are available under the Reports tab. From here you can run customized reports based on date range, usage category, individuals, departments or locations.

To run a report, fill out the form and click **Run Report**.



Report Example



Home | Roster | Registrations | Request Groupcast | My Lists | Administrative Users | Reports

Membership Suite for Practising Law Institute

<< Back To Search

Download as Excel Spreadsheet

Collapse All

Dates: from 1/1/2017 to 6/30/2017
Search Product Types: Groupcast, Live Audio Webcast, Audio Download, Video Download, Programs, SECI, Online
Location: All Office Locations
Department: All Departments
Report Date: 6/8/2017

Practising Law Institute

New York, NY (1177 Avenue of the Americas)

Total Attendees = 2857, Total Price = $1,902,765.91

Organization	Organization Location	Item ID	Location	Item Class	Item Desc	Start Date	End Date	Indv ID	Name	Attendees	Retail Price	Department
Practising Law Institute	152413-Practising Law Institute-New York, NY	212311		Audio Only On-Demand Web	Say Yes to Less Stress: A Mindfulness Training for Lawyers	5/3/2017	5/3/2017	1088135	[redacted]	1	$129.00	Research And Development
Practising Law Institute	152413-Practising Law Institute-New York, NY	215611		Audio Only On-Demand Web	Consumer Data Privacy Legislation: Who's Stepping Back and Who's Stepping Up	6/6/2017	6/6/2017	1117562	[redacted]	1	$129.00	Membership Services