

OREGON ASSOCIATION OF TAX CONSULTANTS

MEMBER'S WEBSITE USER GUIDE



Current Version 1.24.17

Dear Fellow OATC Member,

The Technology Committee has worked long and hard to bring this new membership software to OATC and it's members. This User Manual is an attempt to make this new technology easier for everyone to use. There may be many, many items that need development contained in these pages, as it is a work in progress project.

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:

OATC Net Website Welcoming Letter

Dear @@first_name@@,

The Oregon Association of Tax Consultants is excited to announce the launch of our redesigned website at <https://www.oatc-oregon.org>. With the implementation of this redesigned website, the old website has been retired. Your OATC elected officers, made the decision to invest in a new web platform which will provide greater value to you, our members

To activate your account on the new website, please sign in and complete your member profile, with these steps:

1. Go to a web browser (Internet Explorer, Google Chrome or Firefox) and type in: <https://www.oatc-oregon.org>. This is the home page of our new website.
2. Scroll to the bottom of the screen underneath "Sign In" and enter your Username and Password, as listed here:

Username: @@username@@
Password: [oatcmember](#)

Click on "Sign In"
3. You will receive the message "Please take a moment to verify your member profile options." These options can be changed at a later date. For right now, please just use the boxes that are checked and click on "Save My Settings".
4. Next, click on "My Profile" at the upper right-hand corner. This should bring up your information. Click on "[Edit]" on the right hand side of the line which says "Professional Information". This brings up an "Edit My Member Profile" page. Here is the information which was migrated from our OATC membership records. You have the power to edit your site.
5. If you would like to change your Username (other than what is listed in 2. above), just click on (change) following the current Username. This is the name you will use to login to the site in the future. Now, enter your new Username in the next two boxes. Enter the old password "[oatcmember](#)". Click on "Submit".
6. The next step is to change your password to something that you will remember. To do so, click on (change), which is to the right of "Password". This will bring up a "Change Password" screen. The box for your current password will be filled out with your current Username. Now enter your new password in the next two boxes. Your new password must be a minimum of 8 characters and contain at least one number and one non-number. Click "Submit".

7. Now that you are in your profile, feel free to update any information. However, we advise you don't change the "Full Name" fields. These fields need to match your IRS records. We use these fields when we record the class hours you earn with the IRS. Therefore, they must match what is on record with the IRS. After you change anything, be sure to click on "Save Changes" at the bottom of the page. If you fail to do so, your changes will be lost.
8. Now that you have successfully activated your account, you can access your profile by scrolling down to the bottom of the page under "My Profile", and click on "Manage Profile".

For more information on how to utilize this new website, we have begun forming instructions for members to use. The current version can be accessed in our new website by clicking on the Home Page, then click on "Library", then click on "Website User Guide".

The new site has a clean and vastly updated look, improved navigation, and expanded functionality. Here are just a few things this new website offers us:

- Join or renew your membership online; pay via credit card or check
- Easily maintain your profile: address, email, specialties, etc. – the information others see about you
- Reset your password or request your username in real time
- Register for chapter and state-wide education and pay fees using credit card or check
- Access your completed education, and easily printout your certificates
- Access to your chapter newsletters and information, state newsletters, and other OATC information
- Easily search the member-only directory
- Streamlining our organization's processes
- And much more

This site is not yet fully developed, so there will be many improvements in the future. We appreciate your patience as we implement these changes and improvements. We first want members to be able to login; then look around your chapter site. Second you will be able to register for our upcoming state events: Safety Net and the 2017 Convention. We will work with the chapters to assist them in getting their chapter events on the website as well.

If you have any questions, or need help logging in, feel free to call your Technology Committee: Jim Verrastro, Chairperson, at (971)801-8300, Cathy Johnson at (541)569-2272 or Bob Betts at (503)780-4143.

Simply follow the instructions in the letter.

EDIT USER NAME

At the top of the page, click on “My Profile”, then click on [EDIT] located on the blue bar:

PROFESSIONAL INFORMATION

[EDIT]

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 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, or your changes will not 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, or your changes will not be made.

PLAY WITH THE REST OF YOUR PROFILE PAGE

Here are some of the fun things you can do by clicking on [Edit]:

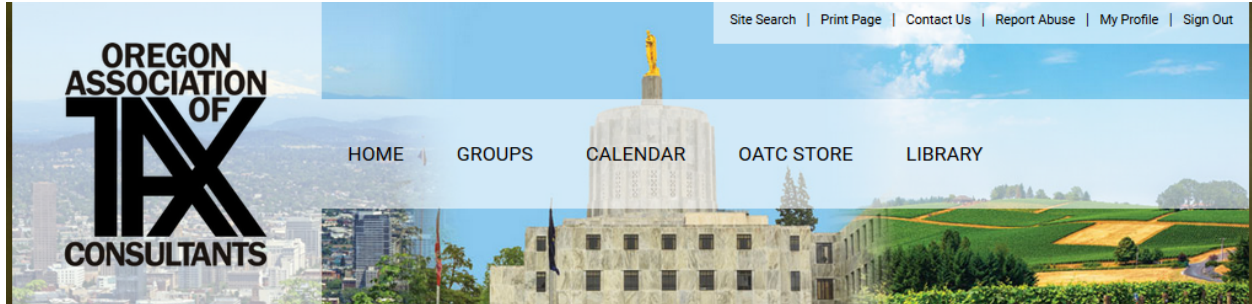
PROFESSIONAL INFORMATION [EDIT]

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”:

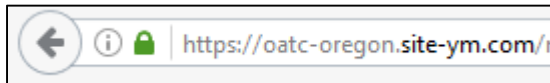
FINDING CHAPTER INFORMATION

Click on “Groups”, then “Chapters”



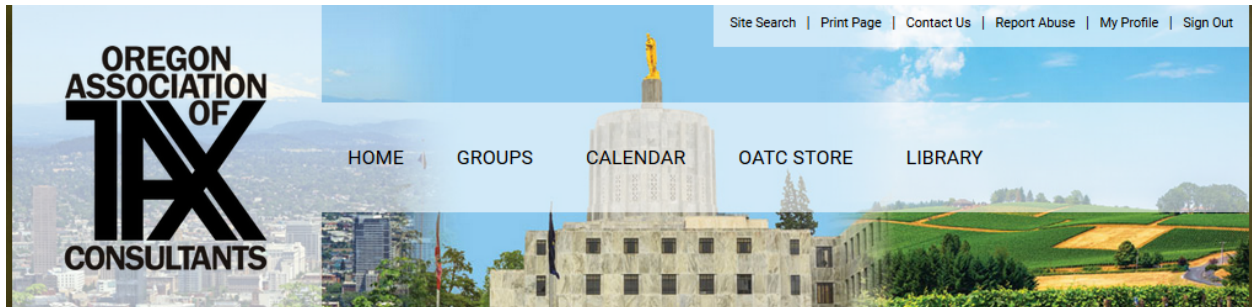
By going to the Chapter page, you can see photos, meeting information, chapter newsletters which are located under the Chapter Library Tab.

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:

Join OATC Now	LATEST NEWS more	CALENDAR more	MY PROFILE
Find Tax Help!	11/13/2016 PTIN Open Season	1/7/2017 OATC 2016 Update - Gresham	Profile Home
About OATC	11/13/2016 IRS Warns Tax Professionals of New e-Services Email Scam	1/11/2017 OATC 2016 Update - La Grande	Manage Profile
Contact Us	9/23/2016 Important Update for e-Services Users	1/12/2017 OATC 2016 Update - Bend	Create Resumé/CV
	9/1/2016 Tax Board Bulletin - Aug 2016	1/13/2017 OATC 2016 Update - Klamath Falls	Groups
		1/14/2017 OATC 2016 Update - Medford	Networks
		1/30/2017 Westside Chapter Education Meeting	Files & Links
			Favorites
			Messages (NEW)
			Connections
			Membership Info
			Refer a Friend

Click on Manage Profile, and scroll down to Professional Development



Professional Development
View current entries and professional development journal.

Here is a listing of your completed classes. Do not be concerned about the “No Certification Selected”. Your credit hours earned are shown in the “Credits” column. 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 (Approved)	12
707SO-T-00369-16-I	8/3/2016	Attended Blue Mt Educational Credits Course (Approved)	2*
707SO-T-00367-16-I	6/9/2016	Attended Event: Blue Mt Health Savings Accounts (Approved)	2
707SO-T-00361-16-I	5/20/2016	Attended Event: Blue Mt Military Class (Approved)	3
707SO-T-00360-16-I	5/20/2016	Attended Event: Blue Mt Tic Tax Toe Class (Approved)	2
707SO-T-00359-16-I	5/20/2016	Attended Event: Blue Mt Closing An S Corp Class (Approved)	2
707SO-T-00358-16-I	5/17/2016	Attended Event: Ble Mt Chapter Panel Discussion (Approved)	2

*Journal entry was self-awarded.

Total Credits Earned: 25