

Trust Safety Accounting Upload Using PCLaw Software

PCLaw has a feature in their software to allow Alberta Law Firms to download data files to their computer to later be uploaded to the Law Society. The PCLaw software automatically detects whether or not the Law Firm is located in Alberta, Canada and then allows this function to be displayed.

The Administrator is the only person with the authority to activate and use the feature, and as such, the menu options and functionality described below will only be available to users with admin access.

To create the files in PCLaw, the user needs to be the only person logged into the program.

NOTE: All law firms must use the new PricewaterhouseCoopers (PwC) Connect Tool to upload the data to the Law Society. An email will be sent to all Responsible Lawyers with instructions to login and use the Connect Tool.

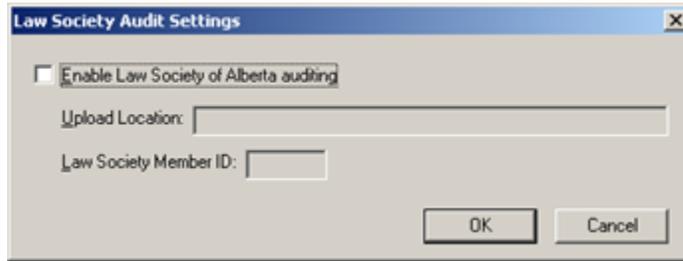
How to use PCLaw Software

To use the PCLaw software:

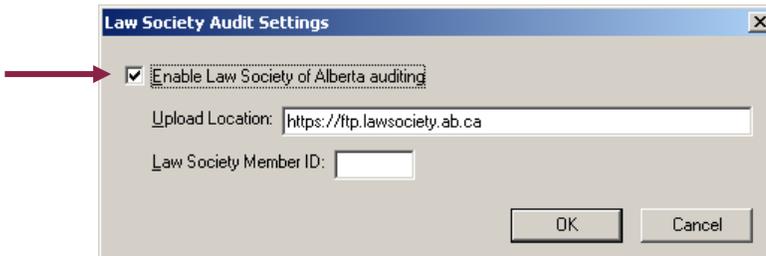
1. Select LexisNexis\PCLaw from the list of programs and log in to your set of books. If you have already updated your Law Society Audit options go to Step 3, if not continue to Step 2.
2. To enable the download feature, update the subsequent settings as follows: From the 'Options' menu, select 'Administrator' and then 'Law Society Audit ...'



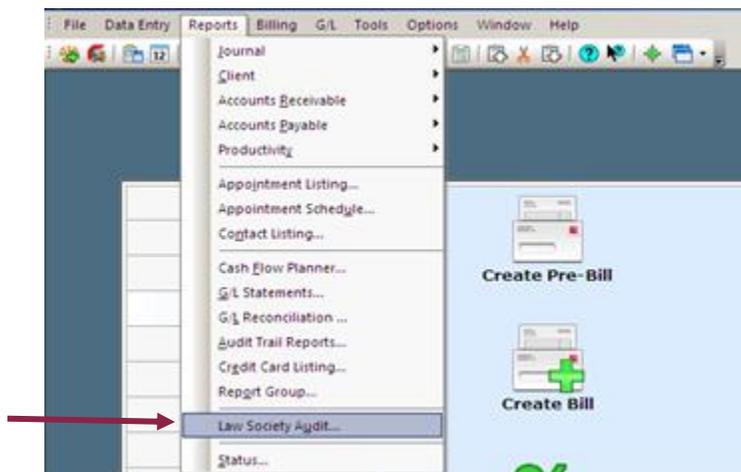
- a. The following pop-up box displays.



- b. Click the checkbox. The Upload location will be pre-populated with a default web address.



- c. Users must enter the Responsible Lawyer's Law Society Member ID and click **OK**. You must use the Responsible Lawyer's Member ID – do not use 1234 or 9999.
- d. You will be prompted to log out of PCLaw and log back in for the changes to take effect.
3. Before you can upload your data to the Law Society, you must now create your report files. Under the **Reports** menu, select the option **Law Society Audit**.



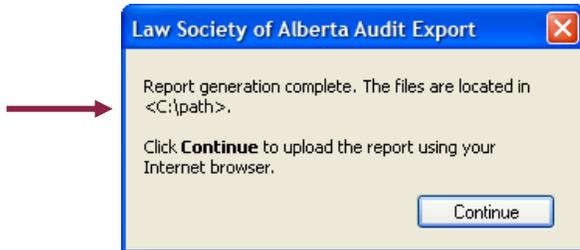
- a. The following pop-up box displays.



The designated year end must be entered with the year for which you are reporting and the month as December. For example, if the Law Firm is reporting for the 2018 reporting period, you would select December and 2018.

- b. The user must select the month as December and year for their firms reporting period and click **OK**.
- c. The report files are saved to a temporary default location on the user's C: Drive. A progress bar will display the status of the audit report creation.

Upon completion, a dialogue box displays to confirm the reports were generated successfully. This dialogue box advises where the files are saved on the computer. Please ensure that you write this path down to use when you upload your files to the Law Society.



Uploading the files to the Law Society

All law firms must use the new (PwC) Connect Tool to upload the data to the Law Society. An email will be sent to all Responsible Lawyers with instructions to login and use the Connect Tool. There is also information available on the Law Society website www.lawsociety.ab.ca.

Questions?

If you have questions regarding the file transfer process or your data upload, contact the Trust Safety department by email at trust.safety@lawsociety.ab.ca or call 403-228-5632.