Change Address or Representation Form user guide: new Attorney Portfolio Updates radio button

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# Table of contents

- Introduction.......................................................................................................................... 3
- Purpose.................................................................................................................................. 3
- Using the Attorney Portfolio Updates button................................................................. 3
- Step-by-step instructions .................................................................................................... 4
Introduction

Purpose
The Change Address or Representation (CAR) Form: new Attorney Portfolio Updates radio button user guide is designed to help you know how to complete the form using the Attorney Portfolio Updates radio button. This new feature will make it easier for attorneys with multiple serial numbers and registration numbers to change their attorney information by only using one form.

Using the Attorney Portfolio Updates button
Use this option when you meet the following two conditions:

- You’re an already appointed attorney or domestic representative for every serial number and registration number you’re entering on the form.
- You’re only updating the attorney or domestic representative information, including bar information and docket numbers.

You cannot appoint a new attorney, replace an existing attorney, or change owner information. You’ll receive an error message if there is no attorney of record for a serial number or registration number you entered.
Step-by-step instructions

2. Enter your serial numbers or registration numbers on the wizard page.
   a. Pre-registration and post-registration numbers can be updated together. The status of the filing doesn’t matter.
   b. Madrid (79-series, Section 66(a)) and non-Madrid numbers can be updated together.
3. Select Yes to the Attorney Portfolio Updates radio button.
   a. Selecting Yes allows you to update the attorney and domestic representative information for multiple serial numbers and registration numbers.
   b. Selecting No loads the regular version of the CAR form.

4. Press the “Continue” button at the bottom of the page.
5. On the next page, you’ll see information about the serial numbers and registration numbers you entered. Review the information for accuracy.
6. Press the “Continue” button at the bottom of the page.
7. On the Attorney Information page, update the information, as needed.
   a. You cannot change the attorney’s name.
   b. You must check the box, under the attorney name field, to confirm that the serial numbers and registration numbers listed on the page are correct. The attorney information from this page will overwrite all files connected to the serial numbers and registration numbers entered on the wizard page.
   c. If any of the files contain a foreign address, you can update the domestic representative information.

8. Complete the rest of the form and submit, as usual.