

PRO BONO SERVICE REPORT AND IOLTA REPORT ONLINE FILING

PLEASE NOTE

We encourage all attorneys to schedule *recurring* appointments on your own calendars with for **January 15** of every year. Set them up with pop-up reminders, include the MDCourts.gov, and make sure they automatically renew (like holidays). This will allow *four weeks* to comply before the **February 15 deadline**. You do not need to have received any paperwork first, *and* this is the last year letters will mailed. All future communications will be *digital*, so by putting in this reminder you'll be *ahead* of the curve! (As there is a **\$50 recertification fee**, consider this a money-saving tip.)

FILING REPORTS

[Rule 19-503 \(formerly 16-903\)](#) provides that all lawyers licensed to practice law in the State of Maryland are required to fulfill two important reporting requirements each year. These reports are mandatory *regardless* of whether any pro bono service has been provided or whether any IOLTA funds are maintained. Failure to comply with the Pro Bono or IOLTA reporting requirement can result in decertification from the practice of law in this state.

1. Go to www.MDCourts.gov
2. On the left side of the page, click **File Pro Bono/IOLTA Reports**
3. On the next page, click the red **ONLINE FILING** button (middle/center of page)
4. Simply type in your FIRST and LAST names, click **SEARCH**, and *then* click on your blue **ID number** on the left
 - This puts you right into the Pro Bono report, at the completion of which you are automatically prompted to do the IOLTA report.
 - (*I recommend doing the Search process rather than typing in your ID number as it will reduce the chance of inadvertently not filing the second report.*)
 - If you already filed your Pro Bono form, but *have not yet* filed your IOLTA Report, please note that clicking on your ID number at this point will take you into a *blank* Pro Bono Report (which is *not* what you want to do!). Instead, type your ID number at the top and click **IOLTA Report**. (If you don't know your ID number, search your name, copy your ID number, go *back* to the Search page, paste/type your ID number at the top of that page, and then click IOLTA Report.
5. Tips:
 - For question **1** of the **Pro Bono form**, be sure to put numbers in every block that requests them – don't leave any blank, and don't use anything *but* numerals (no dots, hyphens, letters, etc.)
 - For question **7**, simply check any that apply (if none apply, simply disregard)
 - On the **IOLTA form**, simply select whichever item(s) 1 through 5 actually apply(ies) to you

Additional information can be found here: <http://mdcourts.gov/probono/faqs.html>. If you experience significant difficulties filing online, as a last resort you may *mail* hard copies to the Administrative Office of the Courts at P.O. Box 319, Simpsonville, MD 21150-0319. *It is highly encouraged that you file online; eventually, this will be the only option.*

CONFIRMING SUBMISSION (*also: www.MDCourts.gov/probono/confirmreceiptprobonoiolta.html*)

1. Go to www.MDCourts.gov
2. On the left side of the page, click **File Pro Bono/IOLTA Reports**
3. On the next page, near the bottom left, click **ONLINE FILING**
4. Type in your FIRST and LAST names, AND then click on **SEARCH**
 - On the next screen you will see the dates of when each report was submitted
 - *If you have already filed your Pro Bono Report, do NOT click on your ID number as it will open into a blank Pro Bono form (which is confusing!)*
 - You can take a "print screen" of this page and save it to a document on your hard drive for future reference. ("**Jing**" is a free program you can download for this purpose, or just use your **PrtScn** button, typically located at the top right corner of your keyboard.)

HELP WITH REPORTING VIA PRO BONO RESOURCE CENTER

Email reporting@probonomd.org or call Elizabeth at 443-703-3045. For *IOLTA-specific* questions, call 410-576-9494.

UPDATING CONTACT INFORMATION

It is each attorney's responsibility to maintain current contact information with the Client Protection Fund at all times. You can do so *online* through the new **ATTORNEY INFORMATION SYSTEM (AIS)**, accessible through the judiciary website, at: <http://mdcourts.gov/lawyers/ais.html>. If absolutely necessary, you can write a letter on your *own* letterhead or else print CPF's form (www.MDCourts.gov/CPF/forms.html) and *fax* it directly to 410-897-0555. If you need to *mail* your update, that address is: Client Protection Fund, 200 Harry S. Truman Pkwy, Suite 350, Annapolis, MD 21401 (also provided on the form).

PAYING ANNUAL MEMBERSHIP DUES TO THE CLIENT PROTECTION FUND (CPF)

Please pay *online* by clicking on the link (<http://mdcourts.gov/cpf/index.html>) to AIS. You can *mail* your check to the CPF (address above). Dues are invoiced in July and may be charged a *late* fee after August 31.

REGARDING THE LETTER REQUESTING YOUR FEDERAL TAX ID

If you received a letter requesting your Federal Tax ID number, please log into the AIS to provide that information (or clarify that you don't have one). If you have any additional questions, contact the CPF directly at 410-630-8140.

Every Attorney's To-Do List

Three Things ...

There are three important but relatively easy things **every attorney must do each year** in order to stay certified to practice law in the State of Maryland:

1. File the Pro Bono Legal Service Report

Lawyer Pro Bono Legal Service Reports must be filed annually with the Administrative Office of the Courts (AOC) **by February 15**. Under Rule 19-503 (*formerly Rule 16-903*), reports for a given year will be mailed to all lawyers on the Maryland Client Protection Fund list no later than January 10 of the following year. Reports may be filed at www.MDCourts.gov regardless of receipt of the mailing.

Rule 19-306.1 (*formerly Rule 6.1*) of the Rules of Professional Conduct governing the rendering of pro bono legal service includes a definition of pro bono service and an annual "aspirational" goal of 50 hours of service for lawyers in the full-time practice of law. The Rule also contains a provision permitting a lawyer to make a financial contribution to a legal services organization in lieu of such service. Please note that pro bono service is still voluntary – it is only the reporting of the service that is mandatory. Even if you did not provide pro bono legal service in a given calendar year, you must report that. The Court recommends that you visit the judiciary's website to review the Rule and a list of Frequently Asked Questions about the reporting requirement and what qualifies as pro bono service. You may also contact the statewide Standing Committee on Pro Bono Legal Service at: reporting@probonomd.org.

2. File the IOLTA Compliance Report

The IOLTA Compliance report also must be filed annually with the AOC **by February 15**, and can also be filed online at www.MDCourts.gov. From the letter by the Hon. Mary Ellen Barbera, sent to all Maryland attorneys in good standing:

The IOLTA reporting requirement is intended to strengthen uniform compliance with the mandatory program and capture all of the IOLTA-eligible trust funds. IOLTA revenues administered by the Maryland Legal Services Corporation (MLSC) constitute one of our State's principal funding sources for the provision of civil legal services to our low-income population. Your IOLTA Report should reflect IOLTA accounts in existence as of the date you complete the report. Even if you do not have an IOLTA account you still must comply with the Rule by filing. More information on MLSC and the IOLTA program is available at the MLSC website: www.mlsc.org.

3. Pay Client Protection Fund Dues

Pay annual Client Protection Fund Dues **by August 31** (visit www.mdcourts.gov/cpf/index.html). Per the Regulations of The Client Protection Fund of The Bar of Maryland, paragraph (i)(10):

Payment of mandatory assessments must be received by the Fund on or before the due date. No late fee will be assessed until after August 31. To avoid an additional late fee, any balance due must be received by December 31. December admittees who are billed for the full fiscal year assessments are allowed a due date of March 31 of the following year to avoid a late fee.

Maintaining compliance is as easy as 1, 2, 3 ... do it online, on time!

For reporting assistance or more information,
contact Elizabeth Grove at the Pro Bono Resource Center of Maryland:
egrove@probonomd.org, 443-703-3045.