

ASSISTANCE WITH ANNUAL REPORTING FY20

Dear Maryland Attorney,

Thank you for contacting the Pro Bono Resource Center of Maryland (PBRC) about annual reporting. We are assisting the Maryland Administrative Office of the Courts (AOC) with the annual Pro Bono and IOLTA reporting process. The information below will assist with **all four compliance requirements** via the [Attorney Information System](#) (AIS) in accordance with [Maryland Rule 19-802](#).

Please visit <https://jportal.mdcourts.gov/aisattorneyportal/security/login.xhtml> to log into AIS to:

1. Report your Pro Bono activities (Rule 19-503) for the period July 1, 2019, through June 30, 2020;
2. Report current Interest on Lawyer Trust Accounts (IOLTA) (Rule 19-409);
3. Verify your Tax Identification Number (TIN) (Rule 19-605); and
4. Pay your annual assessment to the Client Protection Fund (CPF) of the Bar of Maryland. (Rule 19-606).

The Court provides **Step-by-Step Instructions** here: <https://mdcourts.gov/lawyers/ais/annualcompliance>. *If you need additional guidance, please read through this entire message.*

TO REGISTER YOU WILL NEED:

- A valid email address
- Your **ten-digit** attorney ID number (acquire here: www.mdcourts.gov/lawyers/attylist)
- The last **six digits** of your Social Security Number
 - Be sure to **save your login information** (password, secret answers) somewhere safe, *including the exact spelling of the clues you enter into the system.*
 - Respond to the confirmation **email** from attorney_info_sys@mdcourts.gov.
 - Note: If you registered last year, you need not do so again.

AFTER YOU LOGIN TO AIS:

The Compliance Summary tab (top left) has a chart that indicates with **red *'s** and **green ✓'s** which of those **four requirements** are (and are not) satisfied. You then **click on the appropriate tab at the top of the page.**

- For Pro Bono and IOLTA reports, in each tab click **Edit Report**
- To update your TIN, click the Update Personal Details tab and **Edit Personal Information**
- To pay the CPF dues, click the **Pay Assessments** tab

HELPFUL SUGGESTIONS:

- General – remember that these reports now cover the **fiscal year** (July 2019-June 2020)
- Question **3** – practice area(s): don't select more than **three** locations
- Question **4** – practice jurisdiction(s): don't select more than **three** locations
- Question **5** – service: don't select more than **three** locations
 - Also, **put a number in every box**, even if that number is a zero (0)
- Click **Save and Continue** all the way through (unless you need to save where you are, close, and come back later)
- If you *started* a report, but ultimately did *not* submit it, you will still see a **red ***
 - You may **EDIT** that same report; the system will not let you start a new one
- Be sure you click **Save and Continue** all the way through until you type in your name (as your signature), click **Submit**, and **Okay**, and finally **Close** after seeing the confirmation

KNOWN TECHNICAL ISSUES (from the AOC):

- The Court's Tech Support recommends that you use [Internet Explorer](#) or [Mozilla Firefox](#) (rather than Chrome or Safari)
- AIS does not allow the use of pre-filled or auto-populated passwords or the use of password saving, which may lock up your account
- If you still have problems logging in, clear your browsing history, or try using a different browser (IE or Firefox), or simply reboot
- Do not use a mobile device to access the system – they often don't let you see everything or even scroll down properly

ADDITIONAL TECH TIPS:

- If you have problems accessing the **SUBMIT** buttons, try making your screen's view *smaller*: hold down the CTRL button and click the "minus" sign on your keypad a few times
- If you were able to do Pro Bono but not IOLTA, try using a **different browser** before contacting Tech Support as this usually resolves the issue

To RESET YOUR **PASSWORD**, RESET YOUR SECRET **ANSWERS**, or get other **TECHNICAL** Help:

- Contact **Service Now** (the Judiciary's IT Help Desk) at 410-260-1114 or via email at mdcourts@service-now.com.

CONTACT NUMBERS:

- Any questions about Assessments and Tax ID info: **CPF**, 410-630-8140
- Questions about your IOLTA account: **MLSC**, 410-576-9494
- Questions about actual reporting: **PBRC**, reporting@probonomd.org (preferable) or 443-703-3045

Otherwise, just be sure to answer every question, don't select more than three options in the drop-down boxes, and don't leave any number boxes empty.

Take care. Be well. Stay strong.

-E

P.S. We recommend that you put the **July 10** date on *your own personal and professional calendars* right now, with a note to visit www.MDCourts.gov to pay your dues and file your reports *before September 10* (of every year). That way, if a communication is missed, you'll still have time to remain in compliance.

Reporting | Elizabeth L. Grove | Executive Assistant
AOC's STANDING COMMITTEE ON PRO BONO SERVICES
PRO BONO RESOURCE CENTER OF MARYLAND, Est. Jan. 16, 1990
520 W. Fayette Street, Suite 300, Baltimore, MD 21201-1756
D 443.703.3045 | **F** 443-808-0992 | **E** reporting@ProBonoMD.org
[Get Updates](#) | [Facebook](#) | [Instagram](#) | [Twitter](#) | [LinkedIn](#) | [Donate](#)

"OVER 30 YEARS OF ENGAGING LAWYERS FOR THE PUBLIC GOOD"
Maryland.FreeLegalAnswers.org – Ask or Volunteer!

Please don't print unless truly necessary. ~ "Kindness always matters."

