

ASSISTANCE WITH ANNUAL REPORTING, FY21

Dear Maryland Attorney,

On behalf of the Maryland Administrative Office of the Courts (AOC), the Pro Bono Resource Center of Maryland (PBRC) is pleased to assist you with the annual Pro Bono and IOLTA reporting process, in accordance with [Maryland Rule 19-802](#). The information below will help you get into compliance.

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, 2020, through June 30, 2021**
2. Report current Interest on Lawyer Trust Accounts (IOLTA) (Rule 19-409)
3. Verify your Tax Identification Number (TIN) (Rule 19-605)
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.*

LOGIN or TECHNICAL ISSUES:

- If you are unable to access the email account you used for your **Login ID**, click here to change it: <https://jportal.mdcourts.gov/aisattorneyportal/security/resetLoginExternal.xhtml>, and click Next
- To complete that step, you will also need your **Attorney ID**, in which case go here: <https://mdcourts.gov/lawyers/attylist> (scroll to bottom to enter your name)
- If you still have the original email account but forgot your **Password**, click here to change it: <https://jportal.mdcourts.gov/aisattorneyportal/security/resetPasswordExternal.xhtml>, and click Next
- For additional/continuing issues, contact **Service Now** (the Judiciary's IT Help Desk) at 410-260-1114 or via email at mdcourts@service-now.com

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 **Start/Edit Report**
- To update TIN, click the Update Personal Details tab and then **Edit Personal Information**
- To pay the CPF dues, click the **Pay Assessments** tab

HELPFUL TIPS:

- Do not use a mobile device to access the system – they often don't let you see everything, or don't allow you to scroll down properly
- 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
- **Step III, Letter A:** If the hours are zero, leave "Areas of Law" as "Select One"
 - If zero hours, skip A, B, and D; you will still need to answer letters C, E, and F
- **Step III, Letter F:** If the hours are zero, *type in the 0* and leave Specify Activities *empty*

- If you *started* a report, but ultimately did *not* submit it, you will still see a **red x**
 - You may EDIT that same report; the system will not let you start a new one
- If you need to stop and finish the process later, click **Save & Close**
- Otherwise, click **Save & 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
- If you were able to complete one report but not the other, try using a **different browser** before contacting Tech Support as this usually resolves the issue

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 **Reporting**: PBRC, reporting@probonomd.org (preferable) or 443-703-3045

CALENDAR SUGGESTION:

We recommend that you put the **July 10** date on *your own personal and professional calendars* right now and set it up as an automatically recurring *annual* appointment. Include a note to visit www.MDCourts.gov to satisfy all four requirements *before September 10* (of every year). By giving yourself two months' notice of the deadline, if a communication from the Court is missed you'll still have time to remain in compliance.

Respectfully,

-E

Reporting | **Elizabeth L. Grove** | Executive Assistant
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ATTORNEYS: Answer the AG's **CALL TO ACTION** *now!*

