

## ASSISTANCE WITH ANNUAL REPORTING, FY22

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 reporting process, in accordance with [Maryland Rule 19-802](#). The information below will help you get into compliance *with all four requirements*.

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, 2021, through June 30, 2022**
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:

- Your “Login ID” is the email address you used to set up your AIS account
- If you are **unable to access the email account** you used for your Login ID, you can simply click “Change Login ID” on the [login page](#)
  - To complete that step, you will also need your **Attorney ID**, which can be found here: <https://mdcourts.gov/lawyers/attylist>
- If you **forgot your Password**, you can simply click “Reset Password” after entering your login ID
- For any *technical* issues, contact **Service Now** (the Judiciary’s IT Help Desk) at 410-260-1114 or via email at [mdcourts@service-now.com](mailto: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** under “Action”
- To update TIN, click the Update Personal Details tab and then **Start/Edit Personal Info**
- To pay the CPF dues, click the **Pay Assessments** tab, then **Start Payment**

### 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 C; you will still need to answer letters C, E, and F
  - Pro bono legal service provided out of state can be included in the hours reported here
- **Step III, Letter F: If the hours are zero, leave Specify Activities empty**
- Be sure to click **Save & Continue** all the way through until you can click **Submit**
- If you need to stop and finish the process *later*, click **Save & Close**

- 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
- **Step V:** Type in your name and click **Submit**, and then **OK**
- You can make a pledge on the next page, or scroll down or click **Continue** at the very bottom
- Finally, click **Close** after seeing the confirmation; you will be able to access your reports later
- 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](mailto:reporting@probonomd.org) (preferable) or 443-703-3045

#### **CALENDAR SUGGESTION:**

We recommend that you schedule an annual appointment on your own personal calendar for **July 10<sup>th</sup>**; set it up to automatically renew every year, and include a note to visit [mdcourts.gov/lawyers/ais](http://mdcourts.gov/lawyers/ais). That way you'll be giving yourself two months' notice to get all four compliance requirements satisfied before the **September 10<sup>th</sup>** deadline, and not be reliant on communications from the Court.

Respectfully,

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**Reporting** | **Elizabeth L. Grove** | Executive Assistant  
**AOC's STANDING COMMITTEE ON PRO BONO SERVICES**  
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