

## ASSISTANCE WITH ANNUAL REPORTING, FY23

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 the AIS portal (<https://mdcourts.gov/lawyers/ais>) and click **Log in** (center box) to:

1. Report your **Pro Bono activities** ([Rule 19-503](#)) for the period **July 1, 2022, through June 30, 2023**
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 Dues Assessment** to the Client Protection Fund (CPF) of the Bar of Maryland. ([Rule 19-606](#))

The Court provides **Step-by-Step Instructions** (via **Quick Reference Cards**) here:

<https://mdcourts.gov/lawyers/ais/annualcompliance>. **For further assistance, read this entire message.**

### LOGIN & TECHNICAL ISSUES:

- Login here: <https://jportal.mdcourts.gov/aisattorneyportal/security/login.xhtml>
- 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, 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**, click **“Reset Password”** after entering your login ID.
- For ALL *technical* issues, please 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. **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 your 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.
- Be sure to click **Save & Continue** all the way through until you can click **Submit.**
- 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 are having problems clicking on the links, you may need to clear your browsing history (also known as clearing your browser cache).
  - Windows PC: Press Ctrl+Shift+Delete; on a MAC: Command+Shift+Delete

### PRO BONO

- **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.
  - All hours must be in full-hour increments (round up to the next whole number).

- 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 the Specify Activities box empty.**
- **Step IV:** The amount at the top is simply *the pledge* you made when you completed the Pro Bono report last year, to remind you to include it this year if you actually paid it.
- **Step V:** Type in your name and click **Submit**, and then **OK**.
- You can make a pledge on the next page to support pro bono efforts, or scroll down to click **Continue** at the very bottom.

#### IOLTA

- **If you conduct legal activities in Maryland** but hold your IOLTA account in the District of Columbia or a contiguous state, then select option **4** and indicate the jurisdiction.
- **If you do NOT conduct legal activities in Maryland** (and therefore do not need a Maryland IOLTA account, even if you may hold an IOLTA account in another state), then select option **5**.

#### BOTH REPORTS

- 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.
- Finally, click **Close** after seeing the confirmation; you will be able to access your reports for future reference.
- 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.

#### QUESTIONS/CONTACT NUMBERS:

- **Tech Support for AIS:** Service Now, 410-260-1114 or [mdcourts@service-now.com](mailto:mdcourts@service-now.com).
- **Assessment & Tax ID:** CPF, 410-630-8140 or [online](#).
- **Pro Bono Report:** PBRC, [reporting@probonomd.org](mailto:reporting@probonomd.org) (preferable) or 443-703-3045.
- **IOLTA Report & Account:** MLSC, 410-576-9494 or [online](#).

#### CALENDAR SUGGESTION:

We recommend that you schedule a *recurring* 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  
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**ATTORNEYS:** Answer the **AG's CALL TO ACTION** now!

**ASK OR VOLUNTEER:** [Maryland.FreeLegalAnswers.org](http://Maryland.FreeLegalAnswers.org)

