Attorney Information System (AIS)
IOLTA Reporting QRC
Quick Reference Card

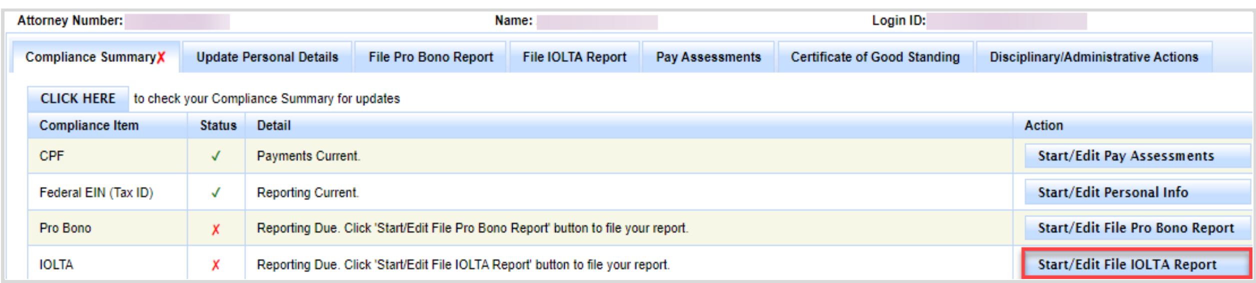
Overview

The Attorney Information System (AIS) is a secure and comprehensive online database for Maryland lawyers. As part of the annual reporting process, attorneys are required to complete the IOLTA Report every year. Take the following steps to log into AIS, view, and complete your IOLTA reporting obligation.

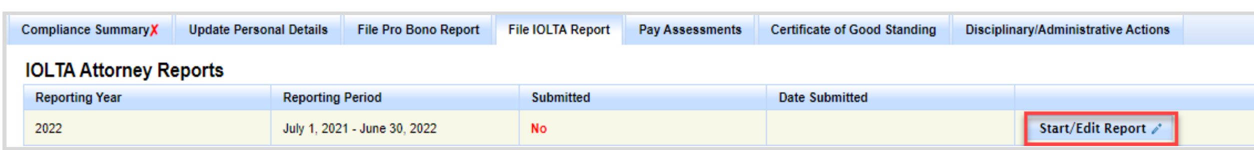
Filing IOLTA Reporting

1. Log into AIS at https://jportal.mdcourts.gov/aisattorneyportal/security/login.xhtml.
2. The Home Page displays. IOLTA reporting can be accessed from the **Compliance Summary** tab or the **File IOLTA Report** tab. The example below demonstrates the steps from the **Compliance Summary** tab.

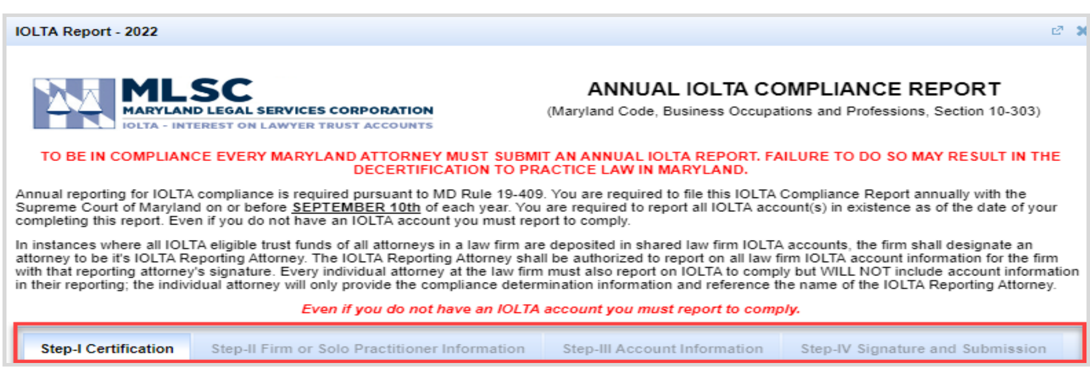
   From the **Compliance Summary** tab, click the **Start/Edit File ILOTA Report** button in the **Action** column to access your IOLTA report.



3. Select the **Start/Edit Report** button to start a report for the current reporting cycle.



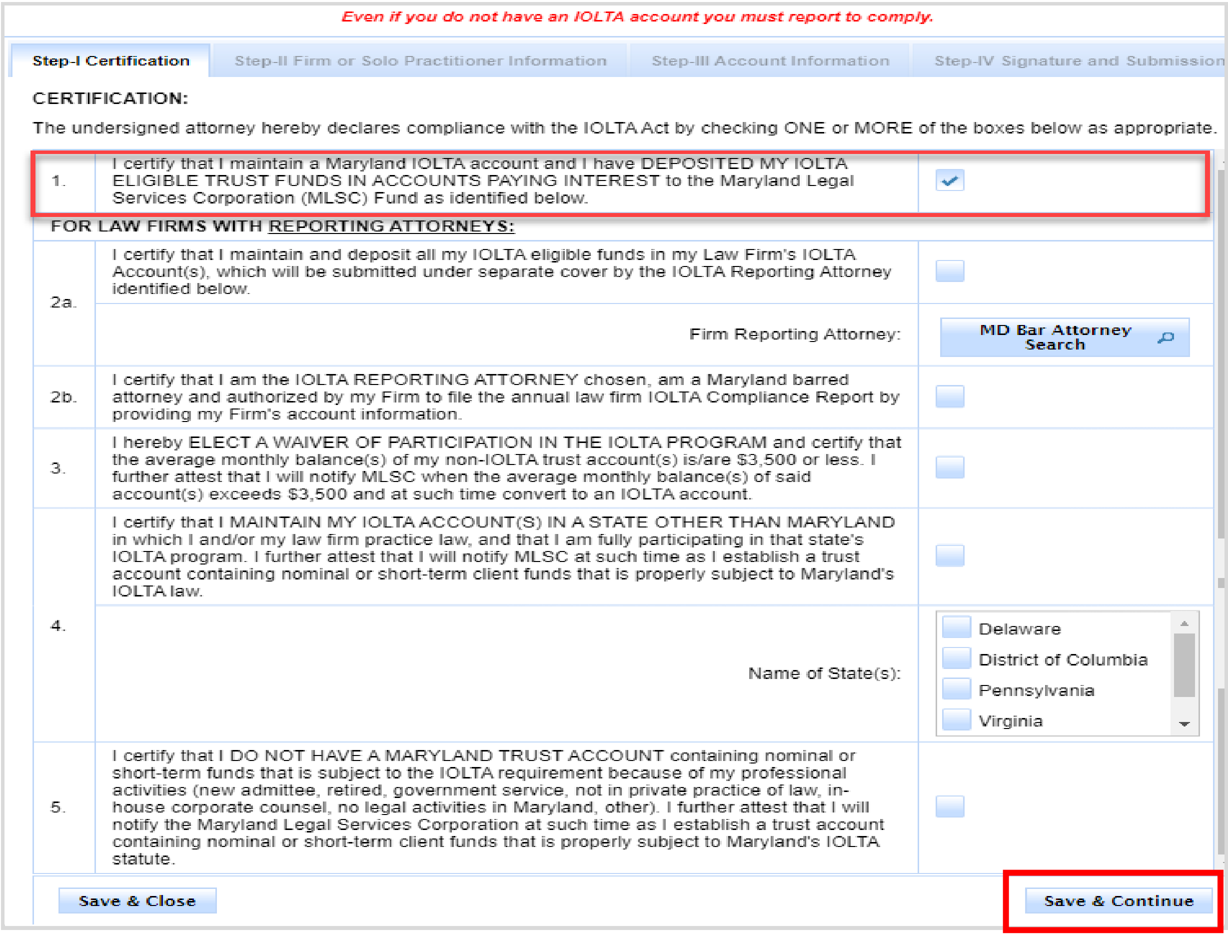
4. The **Annual IOLTA Compliance Report** homepage displays, which outlines the rules and responsibilities for completing the report. There are four (4) separate sections within the IOLTA Report to be completed: **Step–I Certification**, **Step– I Firm Information**, **Step–III Account Information**, and **Step–IV Signature and Submission**. After each step, select the **Save and Continue** button to move to the next tab.



Step – I Certification

The first step requires you to certify that you maintain a Maryland IOLTA account and provide additional information.

A. Click the box(es) to select the applicable certification option for the reporting period.



Even if you do not have an IOLTA account you must report to comply.

Step-I Certification | Step-II Firm or Solo Practitioner Information | Step-III Account Information | Step-IV Signature and Submission

CERTIFICATION:

The undersigned attorney hereby declares compliance with the IOLTA Act by checking ONE or MORE of the boxes below as appropriate.

1.	I certify that I maintain a Maryland IOLTA account and I have DEPOSITED MY IOLTA ELIGIBLE TRUST FUNDS IN ACCOUNTS PAYING INTEREST to the Maryland Legal Services Corporation (MLSC) Fund as identified below.	☑
FOR LAW FIRMS WITH REPORTING ATTORNEYS:		
2a.	I certify that I maintain and deposit all my IOLTA eligible funds in my Law Firm's IOLTA Account(s), which will be submitted under separate cover by the IOLTA Reporting Attorney identified below.	☐
	Firm Reporting Attorney:	MD Bar Attorney Search
2b.	I certify that I am the IOLTA REPORTING ATTORNEY chosen, am a Maryland barred attorney and authorized by my Firm to file the annual law firm IOLTA Compliance Report by providing my Firm's account information.	☐
3.	I hereby ELECT A WAIVER OF PARTICIPATION IN THE IOLTA PROGRAM and certify that the average monthly balance(s) of my non-IOLTA trust account(s) is/are $3,500 or less. I further attest that I will notify MLSC when the average monthly balance(s) of said account(s) exceeds $3,500 and at such time convert to an IOLTA account.	☐
4.	I certify that I MAINTAIN MY IOLTA ACCOUNT(S) IN A STATE OTHER THAN MARYLAND in which I and/or my law firm practice law, and that I am fully participating in that state's IOLTA program. I further attest that I will notify MLSC at such time as I establish a trust account containing nominal or short-term client funds that is properly subject to Maryland's IOLTA law.	☐
	Name of State(s):	☐ Delaware ☐ District of Columbia ☐ Pennsylvania ☐ Virginia
5.	I certify that I DO NOT HAVE A MARYLAND TRUST ACCOUNT containing nominal or short-term funds that is subject to the IOLTA requirement because of my professional activities (new admittee, retired, government service, not in private practice of law, in-house corporate counsel, no legal activities in Maryland, other). I further attest that I will notify the Maryland Legal Services Corporation at such time as I establish a trust account containing nominal or short-term client funds that is properly subject to Maryland's IOLTA statute.	☐

Save & Close | Save & Continue

- If (1.) is selected, Steps I through IV are required for entry.
- If (2a.) is selected, Steps I, II, and IV are required for entry. Selection of **Firm Reporting Attorney** is also required.
- If (2a.) and (2b.) are selected, Steps I through IV are required for entry.
- If (3.) is selected, Steps I and IV are required for entry.
- If (4.) is selected, Steps I and IV are required for entry. Selection of **Name of State(s)** is also required.
- If (5.) is selected, Steps I and IV are required for entry.

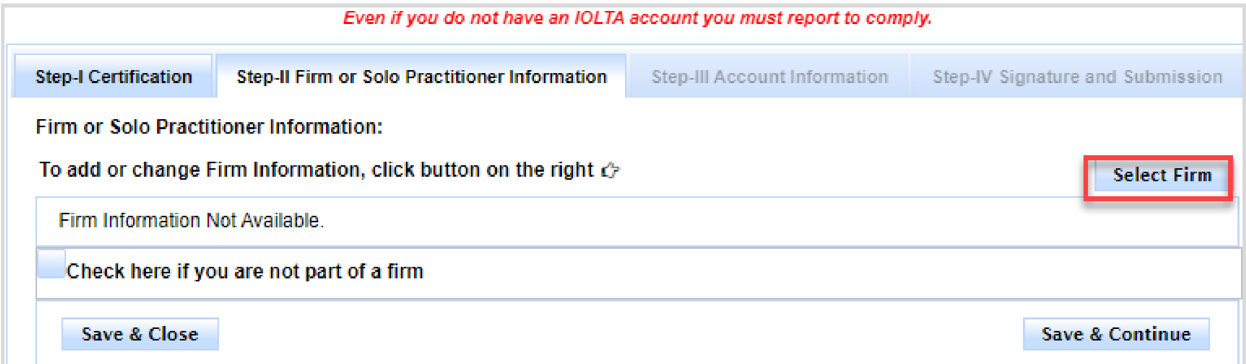
B. Once completed, select the **Save and Continue** button to move to **Step-II Firm Information**.

NOTE: The option to **Save & Close** is available at any time to complete the report at a later time. The report will display as Submitted = ***No***.

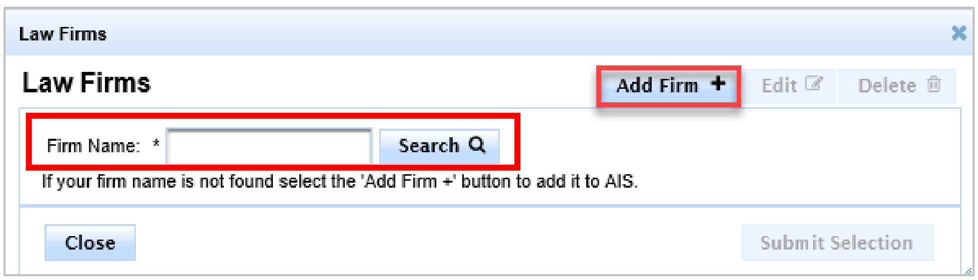
Step – II Firm Information

The second step requires you to add your associated firm information, if applicable. **NOTE:** If you are not a part of a firm, click the check box if you are not part of a firm. Click the **Save & Continue** to proceed to **Step-III Account Information.**

A. To add or change the recorded firm information, click the **Select Firm** button.



B. The **Law Firms** window will display. Attorneys can search for existing firms from a picklist or add a new firm.

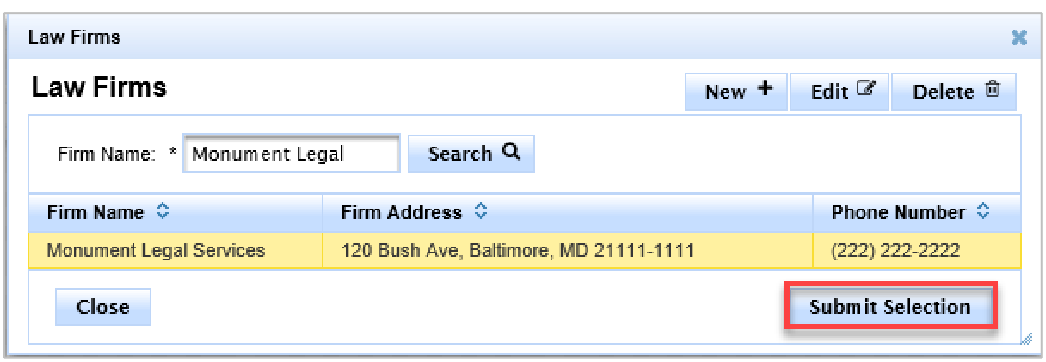


C. Type the name (or part of the name) of the law firm into the **Firm Name** field.

D. Click the **Search** button.

E. A list of firm names that meet the criteria will display. Locate the correct firm name and click to highlight it.

F. Review the firm name, address, and phone number. If correct, click **Submit Selection** button.

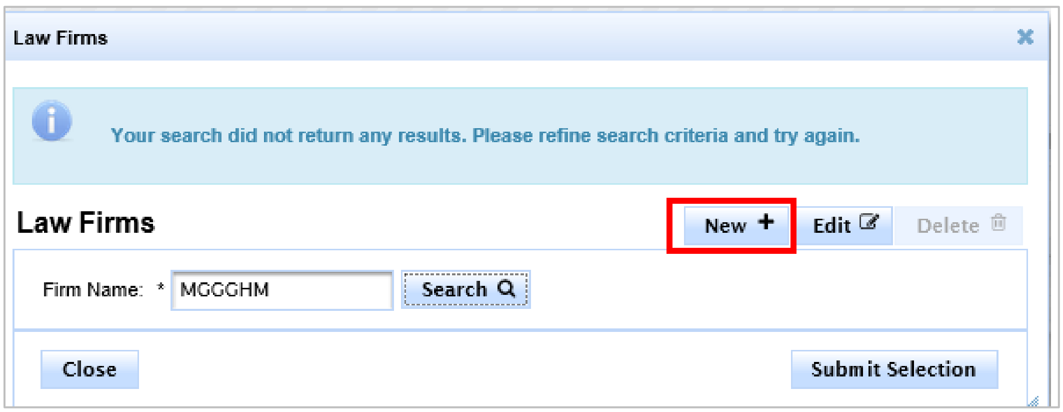


NOTE: If the information needs to be updated, click the **Edit** button to make changes before submitting.

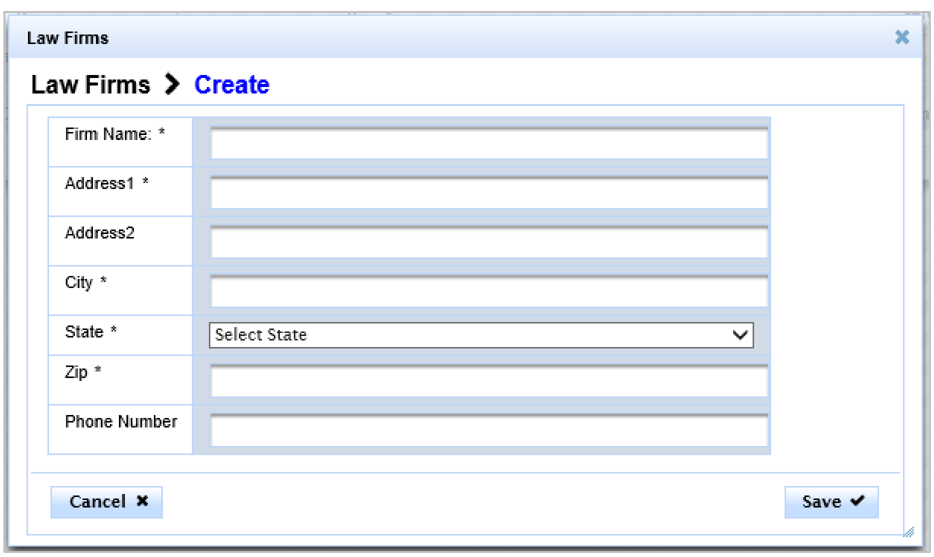
G. The firm name has been added to the report. Click the **Save & Continue** button to proceed to **Step-III Account Information.**

If the firm name is not listed, take the following steps:

H. Click the **New+** button.

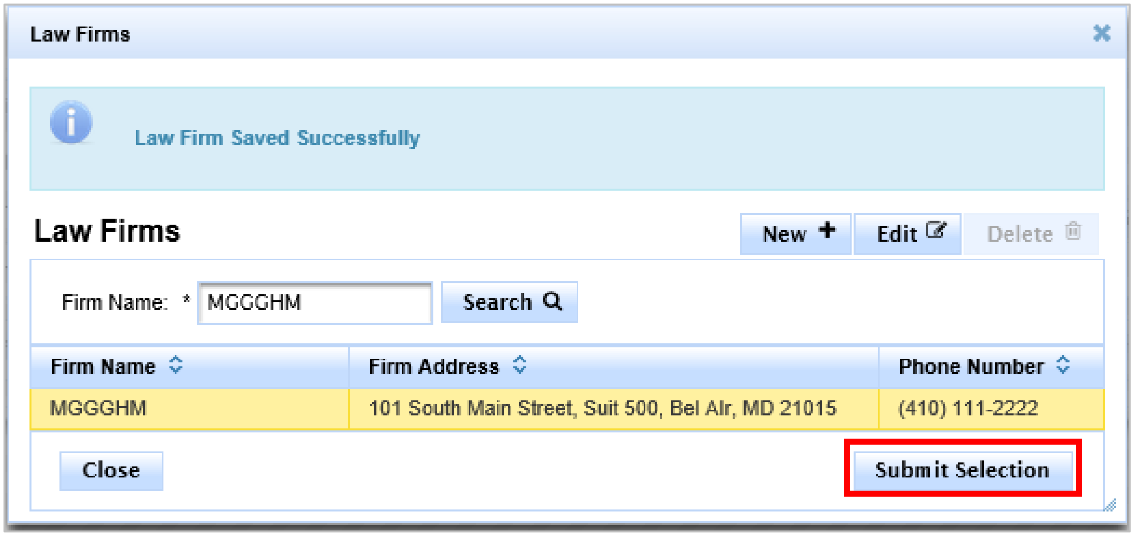


I. The **Law Firms > Create** window will display. Enter the information in the required (*) fields to create a new entry and add the law firm to the AIS picklist.



J. Click the **Save** button.

K. A message indicating the new firm was saved successfully will display and the newly-added law firm will display in the list. Click the firm name to highlight it.



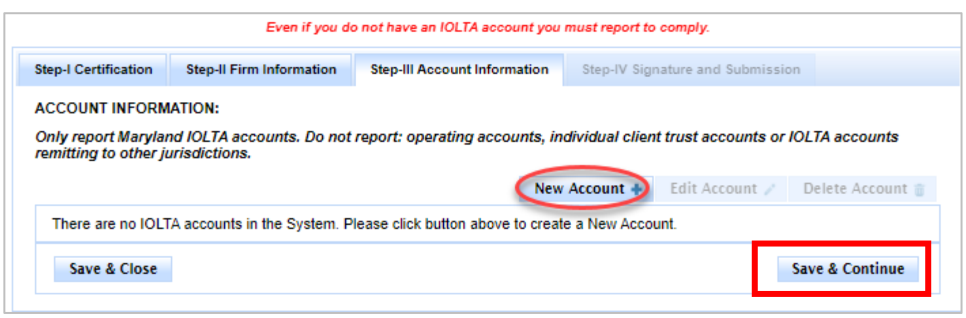
L. Select the **Submit Selection** button to add the firm name to the report.

M. Click the **Save & Continue** button to progress to **Step-III Account Information**.

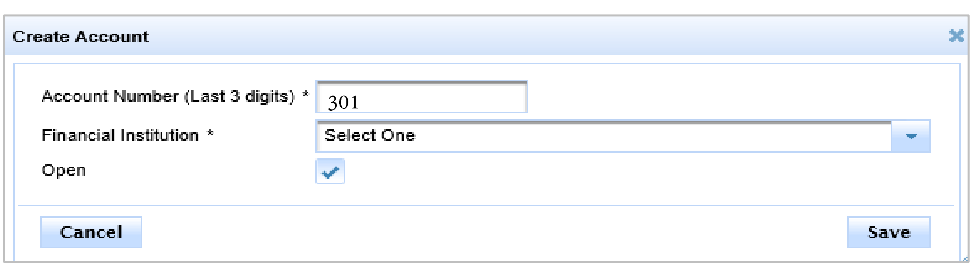
Step-III Account Information

Maryland IOLTA accounts must be added as part of the IOLTA reporting process. Do not report operating accounts, individual client trust accounts, or IOLTA accounts remitting to other jurisdictions. Only current IOLTA accounts are to be reported. **NOTE**: Account information can be edited or deleted if needed.

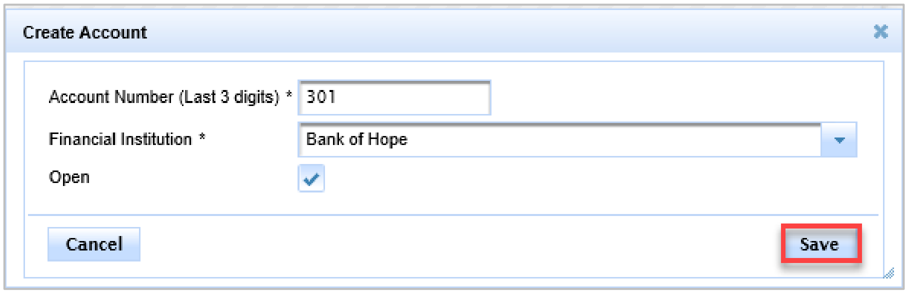
A. To add an account for reporting, click the **New Account** button.



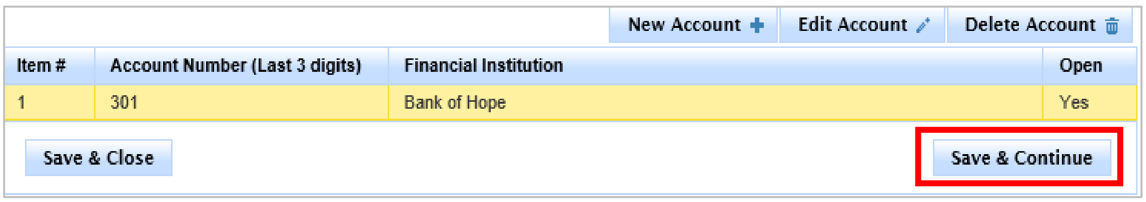
B. The **Create Account** window is displayed. Enter the **last 3-digits** of the IOLTA Account Number**.**



C. In the **Financial Institution** field, click the drop-down arrow and select the name of the institution where the account exists. If the bank is not listed, select Other. **NOTE**: If the account is closed, deselect the **Open** check box.



D. Click the **Save** button.

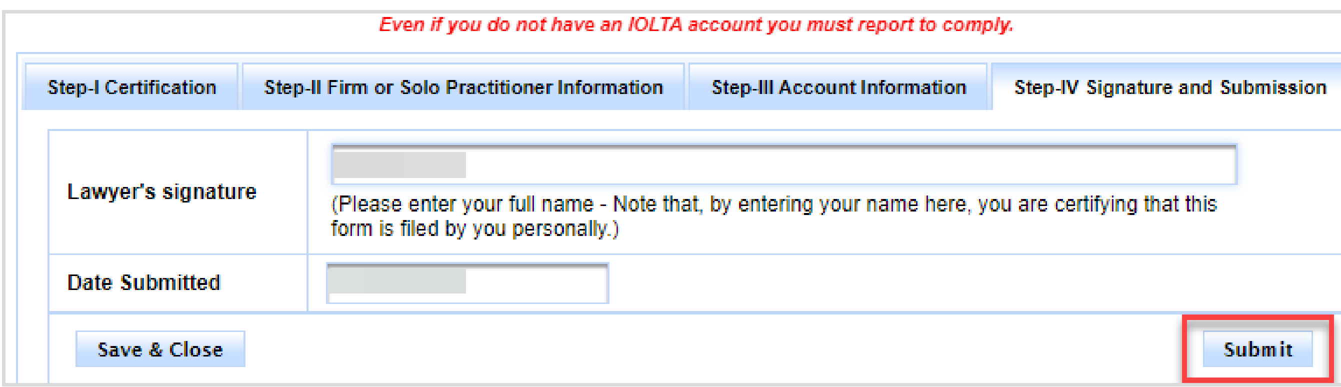


- The Account entry can be edited or deleted when highlighted.
- Additional accounts can be created by selecting the **New Account +** button and repeating steps above.

E. Select the **Save & Continue** button to proceed to **Step-IV Signature and Submission**.

Step-IV Signature and Submission

The final step is to review and sign the IOLTA report.



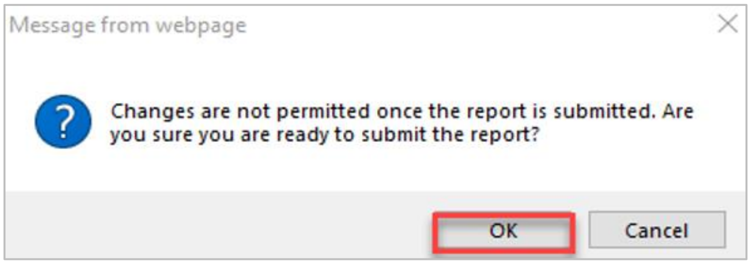
A. In the **Lawyer's signature** field, enter your full name. **NOTE:** By entering your name here, you are certifying that this form is completed by you personally.

B. Click the **Submit** button. A form will display with answers provided. Review for accuracy before proceeding.

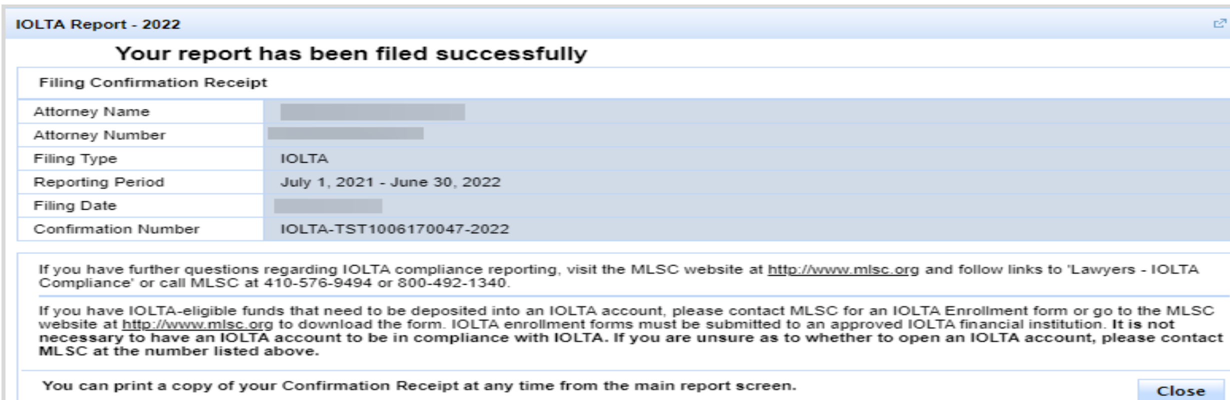
NOTE: If any sections are incomplete, an error will generate in a red banner at the top of the screen. To correct the issue, navigate back to the appropriate tab, select the **Save and Continue** button on that step, then return to **Step-IV Signature and Submission.**

C. Select the **Submit** button to officially submit your IOLTA Report filing.

D. A confirmation message will display. Click **OK** when you are ready to submit the report.



E. The **Filing Confirmation Receipt** will display. A copy of the **Confirmation Receipt** can be printed from the main **File IOLTA Report** tab.



IOLTA Report - 2022

Your report has been filed successfully

Filing Confirmation Receipt

Attorney Name	
Attorney Number	
Filing Type	IOLTA
Reporting Period	July 1, 2021 - June 30, 2022
Filing Date	
Confirmation Number	IOLTA-TST1006170047-2022

If you have further questions regarding IOLTA compliance reporting, visit the MLSC website at http://www.mlsc.org and follow links to 'Lawyers - IOLTA Compliance' or call MLSC at 410-576-9494 or 800-492-1340.

If you have IOLTA-eligible funds that need to be deposited into an IOLTA account, please contact MLSC for an IOLTA Enrollment form or go to the MLSC website at http://www.mlsc.org to download the form. IOLTA enrollment forms must be submitted to an approved IOLTA financial institution. **It is not necessary to have an IOLTA account to be in compliance with IOLTA. If you are unsure as to whether to open an IOLTA account, please contact MLSC at the number listed above.**

You can print a copy of your Confirmation Receipt at any time from the main report screen.

Close

F. Click the **Close** button.

Final Notes

- The report was successfully submitted.
- The report can be printed from the **File IOLTA Report** tab.
- The **Filing Confirmation Receipt** can be printed from the IOLTA Report tab.
- The option to edit the report is no longer available after submitting.
- The option to delete an incomplete report is no longer available after submitting.
- IOLTA Compliance status is changed to Reporting Current.

Compliance Item	Status	Detail
CPF	✔	Payments Current.
TIN	✔	Reporting Current.
Pro Bono	✔	Reporting Current.
IOLTA	✔	Reporting Current.

Getting Help

For assistance with paying assessment fees online through AIS, contact JIS Support @ 410.260.1114 or mdcourts@service-now.com.