

Attorney Information System (AIS) Pro Bono 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 Pro Bono Report every year. Take the following steps to log into AIS, view, and complete your Pro Bono reporting obligation.

Filing ILOTA Reporting

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

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

Attorney Number:	Name:	Login ID:				
Compliance Summary X	Update Personal Details	File Pro Bono Report	File IOLTA Report	Pay Assessments	Certificate of Good Standing	Disciplinary/Administrative Actions
CLICK HERE to check your Compliance Summary for updates						
Compliance Item	Status	Detail	Action			
CPF	✓	Payments Current.	Start/Edit Pay Assessments			
Federal EIN (Tax ID)	✓	Reporting Current.	Start/Edit Personal Info			
Pro Bono	X	Reporting Due. Click 'Start/Edit File Pro Bono Report' button to file your report.	Start/Edit File Pro Bono Report			
IOLTA	X	Reporting Due. Click 'Start/Edit File IOLTA Report' button to file your report.	Start/Edit File IOLTA Report			

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

Pro Bono Reports							
Reporting Year	Reporting Period	Submitted	Date Submitted	Action			
2022	July 1, 2021 - June 30, 2022	No		Start/Edit Report	Print Report	Print Receipt	Make Donation \$

4. The first tab displays. There are five (5) separate sections within the Pro Bono Report to be completed: **Step-I Professional Activity**, **Step-II Practice Area**, **Step-III Pro Bono Service**, **Step-IV Financial Contributions**, and **Step-V Signature and Submission**. After each step, select the **Save and Continue** button to move to the next tab.

Step-I Professional Activity

The first step requires you to document the lawyer's status during all or part of the reporting period.

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

Step-I Professional Activity	Step-II Practice	Step-III Pro Bono Service	Step-IV Financial Contributions	Step-V Signature and Submission
PROFESSIONAL ACTIVITY: Lawyer's status during all or part of the reporting period				
A.	What type of practice did you engage in during the reporting period?			
1.	Full-time practice of law			<input type="checkbox"/>
2.	Part-time practice of law			<input type="checkbox"/>
3.	Judicial law clerk			<input type="checkbox"/>
4.	Judge or Magistrate			<input type="checkbox"/>
5.	Retired - Selecting this option will not change your status. To go on Inactive/Retired status, please contact the Client Protection Fund .			<input type="checkbox"/>
6.	Not actively engaged in the practice of law or doing non-legal work			<input type="checkbox"/>
B.	I was prohibited by statute from providing pro bono service as described in Rule 19-306.1(b)(1)			<input type="checkbox"/>
<input type="button" value="Save & Close"/>				<input type="button" value="Save & Continue"/>

- If (A.1) is selected for practice status, Steps I through V are required for entry.
- If (A.2) is selected for practice status, Steps I through V are required for entry.
- If (A.3) is selected for practice status, Steps I, III, IV, and V are required for entry.
- If (A.4) is selected for practice status, Steps I, III, IV, and V are required for entry.
- If (A.5) is selected for practice status, Steps I, III, IV, and V are required for entry.
- If (A.6) is selected for practice status, Steps I, III, IV, and V are required for entry.
- If (A.B) is selected for practice status, Steps I through V are required for entry.

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

Step-I Professional Activity	Step-II Practice	Step-III Pro Bono Service	Step-IV Financial Contributions	Step-V Signature and Submission
PROFESSIONAL ACTIVITY: Lawyer's status during all or part of the reporting period				
A.	What type of practice did you engage in during the reporting period?			
1.	Full-time practice of law			<input checked="" type="checkbox"/>
2.	Part-time practice of law			<input type="checkbox"/>
3.	Judicial law clerk			<input type="checkbox"/>
4.	Judge or Magistrate			<input type="checkbox"/>
5.	Retired - Selecting this option will not change your status. To go on Inactive/Retired status, please contact the Client Protection Fund .			<input type="checkbox"/>
6.	Not actively engaged in the practice of law or doing non-legal work			<input type="checkbox"/>
B.	I was prohibited by statute from providing pro bono service as described in Rule 19-306.1(b)(1)			<input type="checkbox"/>
<input type="button" value="Save & Close"/>				<input type="button" value="Save & Continue"/>

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 Practice Area

The second step requires you to add the types of organizations where you work or worked during the year.

- A. In **Section A**, in the **Organization** field, click the drop-down arrow to choose the type of organization worked.

Step-I Professional Activity Step-II Practice Area Step-III Pro Bono Service Step-IV Financial Contributions Step-V Signature and Submission

PRACTICE AREA:

A. TYPE OF ORGANIZATION WHERE I WORK OR WORKED: Please select one (1) of the following: Select One

Firm Size: Select One

- a. If **Private Firm** is selected, select the firm size from the drop-down list.

Private Firm

- Select One
- Civil Legal Services Org.
- Corporate Counsel
- Government Agency
- Not Practicing
- Private Firm

Large Firm (21-49 lawyers)

- Select One
- Solo Practitioner (1 lawyer)
- Small Firm (2-5 lawyers)
- Medium Firm (6-20 lawyers)
- Large Firm (21-49 lawyers)
- Extra Large Firm (50+ lawyers)

- B. Select **Primary Practice Area(s)** by rank order from the drop-down list.

Primary Practice Areas - Select up to three practice areas, ranking them by the volume of your work.

Rank : 1 Select One * Practice Area : Corporate

Rank : 2 Select One (Optional) Practice Area : Elder Law

Rank : 3 Select One (Optional) Practice Area : Environmental

- C. Select **Primary Practice Jurisdiction(s)** by ranking order from the drop-down list.

Primary Practice Jurisdiction - Select up to three jurisdictions, ranking them by the volume of your work.

Rank : 1 Select One * Practice County : Baltimore City

Rank : 2 Select One (Optional) Practice County : Charles County

Rank : 3 Select One (Optional) Practice County : Howard County

- D. Click the **Save & Continue** button to move to **Step-III Pro Bono Service**.

Step-III Pro Bono Service

The third step is to specify the hours and areas of Pro Bono Service provided. If Pro Bono services **were** provided, only complete **Step – 3, sections (A, B, C, D, F)**. If Pro Bono services were **NOT** provided, complete **Step - 3, sections (C, E, F)**.

A. Complete the following sections per type of services provided to (A-D):

- Area(s) of Law by ranking order.
- Number of Hours Pro Bono services were provided.
- Number of Hours provided that were referred by a Pro Bono or Legal Services Organization. Enter (0), if not applicable.
- Number of **Additional Pro Bono Hours** provided (Not Through an Organization).
- Number of Hours devoted to activities that improve the law, legal system, or the legal profession. Enter (0), if not applicable.

B. Pro Bono hours are summed in each section and the total of each section is summed in the Total Service Hrs. **NOTE:** If the Total Service Hrs. is equal to (B), selection in (D) is not required.

C. Once completed, select the **Save & Continue** button to proceed to **Step-IV Other Contributions**.

Step-IV Financial Contributions

The fourth step provides the opportunity to report donations that **you personally** contributed, not the contributions of your firm.

- A. In Section A, click the check box and enter the total financial contributions made to people of limited means. Enter 0 if not applicable.

Step-I Professional Activity	Step-II Practice	Step-III Pro Bono Service	Step-IV Financial Contributions	Step-V Signature and Submission
DONATIONS REPORTED FOR THE YEAR 2021				
NONE				
As a reminder, last year you reported making a donation through the AIS Donation Page of \$0.00 dollars. If this is accurate please include this amount in the total reported below.				
OTHER CONTRIBUTIONS: (ENTER 0 IF NOT APPLICABLE)				
A.	<input checked="" type="checkbox"/>	I understand that I am to report only dollars that I personally contributed myself, not the contributions of my firm. If I am a partner, I understand I may report my partner percentage of contributions made by my firm.		\$100.00
I made financial contributions to one or more agencies that provide legal services to people of limited means as indicated.				
Save & Close				Save & Continue

- B. Specify the types of activities related to the hours indicated. **NOTE:** Text is limited to 255 characters.
- C. Select the **Save & Continue** button to proceed to **Step-V Signature and Submission**.

Step-V Signature and Submission

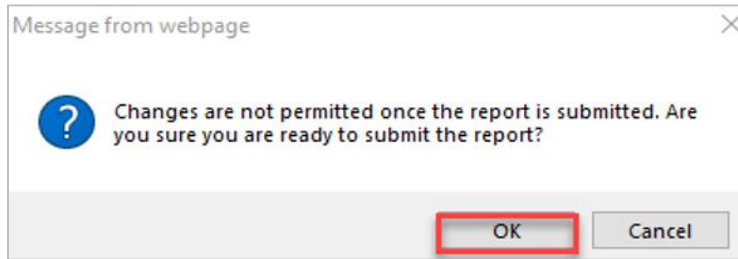
The final step is to review and sign the Pro Bono report.

Step-I Professional Activity	Step-II Practice	Step-III Pro Bono Service	Step-IV Financial Contributions	Step-V Signature and Submission
Lawyer's signature	<input type="text"/> (Please enter your full name. Note that, by entering your name here, you are certifying that this form is filed by you personally.)			
Date Submitted	<input type="text"/>			
Save & Close				Submit

- 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-V Signature and Submission**.

D. A confirmation message will display. Click **OK**.



E. The **Pro Bono Donation** screen is displayed at this time, giving lawyers an option to make a voluntary contribution directly to a selected organization(s). You can:

- Make a donation. See the **How to Make a Donation to a Pro Bono Organization in AIS** Quick Reference Card in the AIS Learning Center on the Annual Compliance Requirements page at <https://mdcourts.gov/lawyers/ais/annualcompliance>. Once complete, select the **Close** button or hit the 'X' at the top of the dialog box to close the donation window.
- Exit without making a donation. Select the **Close** button or hit the 'X' at the top of the dialog box to close the donation window.

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

Filing Confirmation Receipt	
Attorney Name	[Redacted]
Attorney Number	[Redacted]
Filing Type	PROBONO
Reporting Period	[Redacted]
Filing Date	[Redacted]
Confirmation Number	PROBONO-[Redacted]

G. Click the **Close** button.

Reporting Year	Reporting Period	Submitted	Date Submitted	Action
2022	July 1, 2021 - June 30, 2022	Yes	06/15/2023 02:49:44 PM	Start/Edit Report Print Report Print Receipt Make Donation \$

Final Notes

- The report was successfully submitted.
- The report can be printed from the **File Pro Bono Report** tab.
- The **Filing Confirmation Receipt** can be printed from the **Pro Bono Report** tab.
- Donations can be made at any time by selecting the **Make Donation \$** button.
- 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.
- Pro Bono Compliance status is changed to Reporting Current.

Compliance Item	Status	Detail
CPF	✓	Payments Current.
Federal EIN (Tax ID)	✓	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.