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 ILOTA 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.

- 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 **Save & Continue** button again to move 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.**

FIRM INFORMATION:

To add or change Firm Information, click button on the right ☞   Select Firm

Firm Name	Monument Legal Services
Firm Address	120 Bush Ave, Baltimore, MD 21111-1111
Phone Number	(222) 222-2222

Save & Close   Save & Continue

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

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

Law Firms ✖

ℹ Your search did not return any results. Please refine search criteria and try again.

Law Firms   New **+**   Edit ✐   Delete 🗑

Firm Name: * MGGGHM   Search 🔍

Close   Submit Selection

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.

Law Firms ✖

Law Firms ❯ Create

Firm Name: *	
Address1 *	
Address2	
City *	
State *	Select State ⌄
Zip *	
Phone Number	

Cancel ✖   Save ✔

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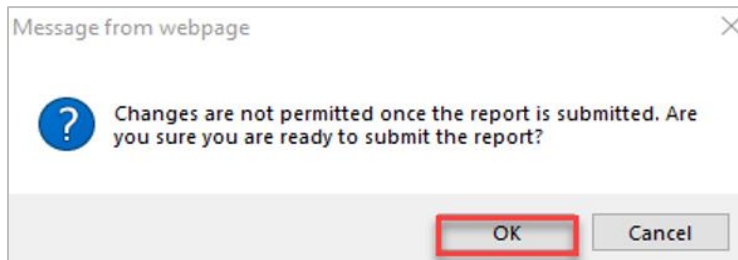
E. The **Filing Confirmation Receipt** will display. A copy of the **Confirmation Receipt** can be printed from the main **File IOLTA Report** tab.
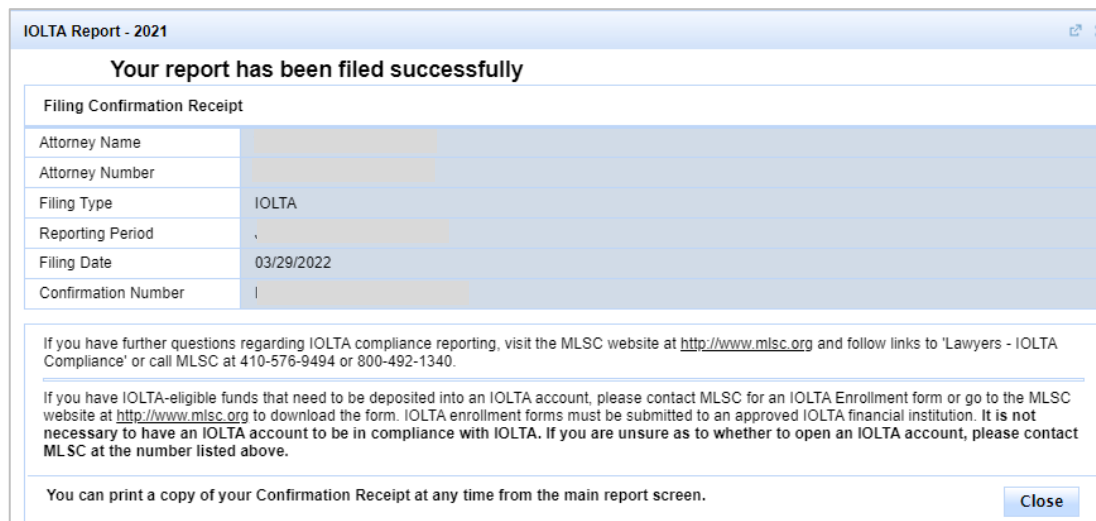
F. Click the **Close** button.

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.