

# 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.

Compliance Item	Status	Detail	Action
CPF	X	Payment Due. Click 'Start/Edit Pay Assessments' button to make payment or to download invoice.	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.

Reporting Year	Reporting Period	Submitted	Date Submitted	Action
2021	July 1, 2020 - June 30, 2021	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 Area	Step-III Pro Bono Service	Step-IV Financial Contributions	Step-V Signature and Submission
<b>PROFESSIONAL ACTIVITY: Lawyer's status during all or part of the reporting period</b>				
<b>A. What type of practice did you engage in during the reporting period?</b>				
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>B. I was prohibited by statute from providing pro bono service as described in <a href="#">Rule 19-306.1(b)(1)</a></b>				
<input type="checkbox"/>				
<input type="button" value="Save &amp; Close"/>				<input type="button" value="Save &amp; 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 through V are required for entry.
- If (A.6) is selected for practice status, Steps I through 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 Area	Step-III Pro Bono Service	Step-IV Financial Contributions	Step-V Signature and Submission
<b>PROFESSIONAL ACTIVITY: Lawyer's status during all or part of the reporting period</b>				
<b>A. What type of practice did you engage in during the reporting period?</b>				
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>B. I was prohibited by statute from providing pro bono service as described in <a href="#">Rule 19-306.1(b)(1)</a></b>				
<input type="checkbox"/>				
<input type="button" value="Save &amp; Close"/>				<input type="button" value="Save &amp; 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

- B. 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
- Other Non-Profit
- 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)

- C. 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

- D. 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

- E. 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.

Step-I Professional Activity	Step-II Practice Area	Step-III Pro Bono Service	Step-IV Financial Contributions	Step-V Signature and Submission
<b>PRO BONO SERVICE - Questions A-F</b>				
<p><b>A.</b> How many hours of pro bono service did you provide without fee or at a substantially reduced fee to:  <small>IF NO HOURS, LEAVE HOURS AS 0 AND LEAVE 'Areas of Law' AS 'Select One'</small></p>				
1. People of limited means <span style="float: right;">Hrs : 0</span>				
Rank : 1 Select One *	Area of law : Select One	Hrs : 0		
Rank : 2 Select One (Optional)	Area of law : Select One	Hrs : 0		
Rank : 3 Select One (Optional)	Area of law : Select One	Hrs : 0		
2. Charitable, religious, civic, community, governmental, or educational organizations in matters addressing the needs of people of limited means <span style="float: right;">Hrs : 0</span>				
Rank : 1 Select One *	Area of law : Select One	Hrs : 0		
Rank : 2 Select One (Optional)	Area of law : Select One	Hrs : 0		
Rank : 3 Select One (Optional)	Area of law : Select One	Hrs : 0		
3. Individuals, groups, or organizations seeking to secure or protect civil rights, civil liberties, or public rights <span style="float: right;">Hrs : 0</span>				
Rank : 1 Select One *	Area of law : Select One	Hrs : 0		
Rank : 2 Select One (Optional)	Area of law : Select One	Hrs : 0		
Rank : 3 Select One (Optional)	Area of law : Select One	Hrs : 0		
4. Charitable, religious, civic, community, governmental, or educational organizations in matters furthering its organizational purposes, when payment of standard legal fees would significantly deplete the organization's economic resources or would be inappropriate <span style="float: right;">Hrs : 0</span>				
Rank : 1 Select One *	Area of law : Select One	Hrs : 0		
Rank : 2 Select One (Optional)	Area of law : Select One	Hrs : 0		
Rank : 3 Select One (Optional)	Area of law : Select One	Hrs : 0		
Total Service Hrs : 0				
<b>B.</b> Of the hours you reported above, how many hours were provided through a pro bono or legal services organization?		<input type="text"/>		
<b>C.</b> What would be an INCENTIVE to engage in pro bono legal work or offer more pro bono legal services?		Select One		
<b>D.</b> Most legal service organizations provide training, mentoring, malpractice insurance, eligibility screening of clients, and a litigation fund. If you did any pro bono legal work OUTSIDE of an organization, why?		Select One		
<b>E.</b> If you were UNABLE to do pro bono legal work this fiscal year, choose up to three reasons to explain why.				
Rank : 1 Select One *	Reason : Select One			
Rank : 2 Select One (Optional)	Reason : Select One			
Rank : 3 Select One (Optional)	Reason : Select One			
<b>F.</b> Separate from the hours above, how many hours did you spend participating in activities that improve the law, legal system, or the legal profession?		Enter Hours: <input type="text"/> Specify Activities: <input type="text"/> 200 characters remaining.		
<a href="#">Save &amp; Close</a>		<a href="#">Save &amp; Continue</a>		

B. Pro Bono hours are summed in each section and the total of each section is summed in the Total Service Hrs.

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.

The screenshot shows the 'Step-IV Financial Contributions' tab selected in a multi-step process. The form is titled 'DONATIONS REPORTED FOR THE YEAR 2020' and has a text input field containing 'NONE'. Below this, a reminder states: '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.' The next section is 'OTHER CONTRIBUTIONS: (ENTER 0 IF NOT APPLICABLE)'. It contains a sub-section 'A.' with a checked checkbox and the text: '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.' To the right of this text is a text input field containing '\$100.00'. At the bottom of the form are two buttons: 'Save & Close' on the left and 'Save & Continue' on the right.

- 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

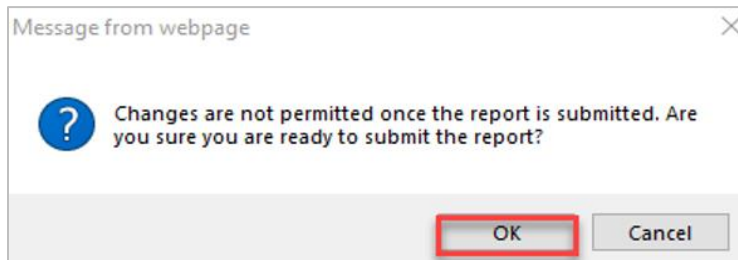
The final step is to review and sign the Pro Bono report.

The screenshot shows the 'Step-V Signature and Submission' tab selected. The form has two main input fields: 'Lawyer's signature' and 'Date Submitted'. The 'Lawyer's signature' field contains a greyed-out name and a note: '(Please enter your full name. Note that, by entering your name here, you are certifying that this form is filed by you personally.)'. The 'Date Submitted' field contains '06/23/2022'. At the bottom left is a 'Save & Close' button, and at the bottom right is a 'Submit' button, which is highlighted with a red arrow pointing to it.

- 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**.

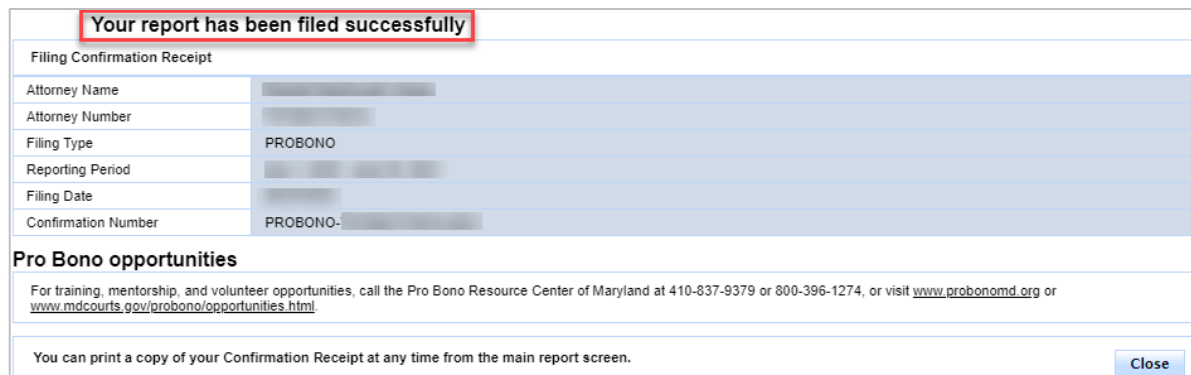
D. A confirmation message will display. Click **OK**.



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.



G. Click the **Close** button.

Pro Bono Reports							
Reporting Year	Reporting Period	Submitted	Date Submitted	Action			
2021	July 1, 2020 - June 30, 2021	Yes	03/28/2022 02:08:14 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](mailto:mdcourts@service-now.com).