



User Guide

Attorney Registration

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<https://ujportal.pacourts.us>





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Section 1: Introduction

Welcome

This user guide details the steps needed for attorneys to complete registrations using the Attorney Registration web interface of the UJS Web Portal and pay their yearly fees to the Disciplinary Board. This includes the ability to designate proxies that will submit the registrations and fees for attorneys on their behalf and the steps proxies need to take to complete registrations for their attorneys.

This payment system currently accepts Visa, MasterCard, Discover, American Express and ATM/Debit cards for payment online, or a voucher may be printed after completing the registration information that can be used to mail payment using a check. For more information on terms and conditions, please refer to the Disclaimer and Terms & Conditions available on the website.

Site Requirements

The Pennsylvania Unified Judicial System (UJS) Web Portal requires a current web browser with JavaScript and cookies enabled. Other browsers without JavaScript and cookies enabled will see graphical errors or may be denied access completely. Due to the technology used in creating this site, using **Google Chrome**  provides the most satisfying user experience. Also, the images that appear in this guide may vary slightly in appearance depending on the browser used and the version.

The reporting and printing functions on the site require Adobe Reader. Please be advised that pop-up blockers may prevent pages and reports from opening properly.

Navigation

Open your Internet browser and enter the following web address:

<https://ujportal.pacourts.us>



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The chapters that follow in this user guide will include the navigation needed within the UJS Web Portal to access the functions being described.



Section 2: UJS Web Portal Access

Accounts

A UJS Web Portal account is needed to access the attorney registration functions. Individual attorneys must create an account to submit their registration and payment or assign proxies that will perform these functions for them. Proxies must create an account in order to submit the registrations and payment for attorneys they are assigned to.

This section includes:

[Self-Registering Attorneys – Creating an Account](#) (pg. 7)

[Proxy Users – Creating an Account](#) (pg. 9)

[Logging into the UJS Web Portal](#) (pg. 12)

[Resetting your Password](#) (pg. 12)

[Managing your UJS Web Portal Account](#) (page 14)

Self-Registering Attorneys – Creating an Account

You must create an account before accessing any of the functions of the attorney registration system. When creating an account, you will need to provide your Bar Number in order to link your account on the UJS Web Portal to information provided by the Disciplinary Board. It should be noted that you may already have a UJS Web Portal account if you have used or registered for PACFile or the Guardianship Tracking System (GTS). You do not need to create an account if you are already registered for PACFile or GTS, or have created an account for attorney registration in a previous year. However, if you used either of these application without adding a role as an attorney, you will need to add your attorney role to your account. For more information, see [Adding Roles](#) on page 15.

To create your UJS Web Portal account, perform the following steps:


1. **In the upper right corner of the screen, click Create New Account.** The Register New Account page opens. Required fields on the page are indicated



with an asterisk (*) and must have a value entered or selected before you can proceed to the next page.

2. **Enter a Requesting User Name.** This is the user name you will use to log into the UJS Web Portal after creating an account. The user name must have at least three characters and can be comprised of letters, numbers and underscores. The user name cannot be your e-mail address, cannot match any other user names already registered on the UJS Web Portal, and cannot contain any special characters (!@#*\$%^&).
3. **Enter your First Name, Middle Name, and Last Name as you would like it to appear on the UJS Web Portal.** This will not change any information on record with the Disciplinary Board.
4. **Select your Address Location, either the United States or select Other if you are located outside of the US.**
5. **Enter the first and second lines of your Address and your City, State, and Zip Code.** If you are located outside of the US, you will need to enter Territory, Postal Code, and Country instead of the state and zip code.
6. **Enter your Phone Number.** Also enter an extension (Phone Number Ext), if appropriate.
7. **Enter your Email Address and confirm it by reentering it on the next line.** The e-mail addresses must match.
8. **Click SUBMIT.**
9. **An e-mail message is sent to the address you provided when creating the account.** You must open the e-mail message and click on the link provided to verify the e-mail address and complete the account creation. This email expires in 48 hours. If you do not respond to the email within 48 hours, you will need to repeat the steps above to create your account.
10. **Establish your password.** Clicking the link in your e-mail opens the Complete your Registration page to record your password. The password must contain at least 10 characters and must contain at least three of the following requirements: a lower case character, an upper case character, a numerical character, a special character.
11. **Verify your intended password by entering it again in the Confirm Password field.**



12. **Click SUBMIT.**
13. **Login with your newly established credentials.** Click the link displayed on the Verification Complete page.
14. **On the Account Login page, enter your User Name and Password.**
15. **Click Login.**
16. **Add your Attorney Role.** On the Manage Account page, scroll down to view the Roles grid and click the Add  icon above the grid to begin recording your attorney role.



NOTE: If the Manage Account page does not open automatically, hover your mouse cursor over the settings gear icon in the upper right corner of the screen, next to your user name, and select Manage My Account from the menu.

17. **On the Request Role window, select a Role of Attorney from the dropdown.** Additional fields display.
18. **Enter your PA Bar Number.** This must be a six-digit number. If your PA bar number contains less than six digits, enter sufficient leading zeros to make a six-digit number (ex. 000123).
19. **Enter the last four digits of your social security number.**
20. **Click SUBMIT.**
21. You will also receive an e-mail from the Disciplinary Board indicating the status of the verification of your PA Bar Number. If the information you entered does not match their records, you may need to contact the Disciplinary Board to verify the information on record. You can then re-enter your role of attorney after your UJS Web Portal account is created (see [Adding Roles](#) on page 15).

Proxy Users – Creating an Account

Proxy users must create accounts before being able to access the registration functions for attorneys that are assigned to them. Also, attorneys will not be able to assign another user as their proxy until the proxy creates an account on the UJS Web Portal. Proxies do not need to be attorneys.



NOTE: You may already have a UJS Web Portal account if you have used Attorney Registration on the UJS Web Portal in past years or use the Guardianship Tracking System (GTS) or PACFile. Do not create an account if you are already registered for the GTS or PACFile or have created an account for attorney registration in a previous year. If you do not remember your login credentials, see [Recovering your User Name](#) on page 13 and [Resetting your Password](#) on page 12.


To create your UJS Web Portal account, perform the following steps:

1. **In the upper right corner of the screen, click Create New Account.** The Register New Account page opens. Required fields on the page are indicated with an asterisk (*) and must have a value entered or selected before you can proceed to the next page.
2. **Enter a Requesting User Name.** This is the user name you will use to log into the UJS Web Portal after creating an account. The user name must have at least three characters and can be comprised of letters, numbers and underscores. The user name cannot be your e-mail address, cannot match any other user names already registered on the UJS Web Portal, and cannot contain any special characters (!@#*\$%^&).
3. **Enter your First Name, Middle Name, and Last Name as you would like it to appear on the UJS Web Portal.** If you are also an attorney, this will not change any information on record with the Disciplinary Board.
4. **Select your Address Location, either the United States or select Other if you are located outside of the US.**
5. **Enter the first and second lines of your Address, your City, State, and Zip Code.** If you are located outside of the US, you will need to enter Territory, Postal Code, and Country instead of the state and zip code.
6. **Enter your Phone Number.** Also enter an extension (Phone Number Ext), if appropriate.
7. **Enter your E-Mail Address and confirm it by re-entering it on the next line.** The e-mail addresses must match.
8. **Click SUBMIT.**
9. **An e-mail message is sent to the address you provided when creating the account.** You must open the e-mail message and click on the link provided to



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verify the e-mail address and complete the account creation. This email expires in 48 hours. If you do not respond to the email within 48 hours, you will need to repeat the steps above to create your account.

10. **Establish your password.** Clicking the link in your e-mail opens the Complete your Registration page to record your Password. The password must contain at least 10 characters and must contain at least three of the following requirements: a lower case character, an upper case character, a numerical character, a special character.
11. **Verify your intended password by entering it again in the Confirm Password field.**
12. **Click SUBMIT.**
13. **Login with your newly established credentials.** Click the link displayed on the Verification Complete page.
14. **On the Account Login page, enter your User Name and Password.**
15. **Click Login.**
16. **If you are not an attorney, your account creation is complete.** If you are an attorney, proceed to the next step.
17. **Add your Attorney Role.** On the Manage Account page, scroll down to view the Roles grid and click the Add  icon above the grid to begin recording your attorney role. If the Manage Account page does not open automatically, hover your mouse cursor over the settings gear icon in the upper right corner of the screen, next to your user name, and select Manage My Account from the menu.
18. **On the Request Role window, select a Role of Attorney from the dropdown.** Additional fields display.



NOTE: If Attorney does not display in the dropdown, this indicates you previously created a UJS Web Portal account and associated the attorney role. If you log into the UJS Web Portal for GTS or PACFile, you should use the same login for attorney registration. If you are not sure if your login, see [Recovering your User Name](#) on page 13 and [Resetting your Password](#) on page 12.

19. **Enter your PA Bar Number.**



20. **Enter the last four digits of your social security number.**
21. **Click SUBMIT.**
22. You will also receive an e-mail from the Disciplinary Board indicating the status of the verification of your PA Bar Number. If the information you entered does not match their records, you may need to contact the Disciplinary Board to verify the information on record. You can then re-enter your role of attorney after your UJS Web Portal account is created (see [Adding Roles](#) on page 15).

Logging into the UJS Web Portal

Once you have created your UJS Web Portal account, you can log in any time. It should be noted that the Attorney Registration System is not available all year long. Registration typically opens in April and runs through the date listed in the fee schedule. For information on when the registration period is open, check the Disciplinary Board's website.

To log into the UJS Web Portal, perform the following steps:

1. **Return to the UJS Web Portal by navigating to <https://ujportal.pacourts.us>.**
2. **Click Login in the upper right corner of the screen.** The Account Login screen displays.
3. **Enter the User Name you selected when you created your UJS Web Portal account.**
4. **Enter your Password.**
5. **Click LOGIN.**

Resetting your Password

If you have forgotten your password, you can reset it in order to be able to log into your UJS Web Portal account.

To reset your password for the UJS Web Portal, perform the following steps:



1. **Return to the UJS Web Portal by navigating to <https://ujportal.pacourts.us>.**
2. **Click Login.** The Account Login screen displays.
3. **Click Forgot My Password.** The Password Reset page opens.
4. **Enter your User Name.** This must be the User Name you entered when creating your UJS Web Portal account.
5. **Enter your e-mail address.** This must be the e-mail address associated with your UJS Web Portal account.
6. **Click SUBMIT.**
7. **Choose an e-mail address.** In the Confirm E-mail Address popup, you will see a list of e-mail addresses if you had multiple addresses associated to your UJS Web Portal account or on file with the Pennsylvania Disciplinary Board. Choose the one that you would like to use for the password reset process.
8. **Open the password reset validation message in your e-mail.** A verification e-mail is sent to the e-mail address you selected. You must click the link in the e-mail to reset your password. This e-mail expires in one hour. If you do not respond to the e-mail within the hour, you will need to repeat the steps above to reset your password again.
9. **Establish your new password.** Clicking the link in your e-mail opens the Password Reset page to record your new password. The password must contain at least 10 characters and must contain at least three of the following requirements: a lower case character, an upper case character, a numerical character, a special character.
10. **Verify your intended password by entering it again in the Confirm Password field.**
11. **Click SUBMIT.**
12. **Click Login to log in with your new password.**

Recovering your User Name

If you have forgotten your user name, you can recover it.



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1. **Return to the UJS Web Portal by navigating to <https://ujportal.pacourts.us>.**
2. **Click Login.** The Account Login screen displays.
3. **Click Forgot My Username.** The User Account Recovery page opens.
4. **Enter your e-mail address.** This must be the e-mail address that you used when creating your UJS Web Portal account.
5. **Click SUBMIT.** If you do not have an attorney role associated with your portal account, skip to Step 10.
6. In the **Attorney Bar No.** Field, enter your Pennsylvania attorney bar number.
7. **Enter the last four digits of your social security number in the Last four digits of SSN field.**
8. Click **SUBMIT.** Your User Name displays on the screen. Make a note of it and click Login.
9. Log in with your username and password. If you do not remember your password, you can reset it. For more information, see [Resetting your Password](#) on page 12. Otherwise, your process is complete and you can skip the remaining steps in this section.
10. **Check your e-mail for your User Account Recovery information for your User Name.** The e-mail will only be sent if it was able to be validated as an address used to register a UJS Web Portal account. If you do not receive the e-mail, you may have used a different e-mail address to register your UJS Web Portal account. You may repeat the process above using a different e-mail address.
11. **Return to the UJS Web Portal to login.** If you do not remember your password, you can reset it. For more information, see [Resetting your Password](#) on page 12.

Managing your UJS Web Portal Account

Managing your UJS Web Portal account allows you to update the contact information saved on to your account, add and update your proxies, manage the users you can proxy for, change your password and deactivate your UJS Web Portal account. For information on adding and updating your proxies, see [Section 4: Attorneys Using a](#)




[Proxy to Register](#) on page 28. For information on managing the users you can proxy for, see [Removing Yourself as a Proxy from your UJS Web Portal Account](#) on page 49. The remaining account management functions are covered in this section.

Updating UJS Web Portal Account Information

Update your UJS Web Portal account information whenever there has been a change to your name, address, phone number and e-mail address.

To update your information, perform the following steps:

1. **Ensure that you are logged into your UJS Web Portal Account.**
2. **Hover your mouse over the Settings  icon in the upper right corner of the screen and select Manage My Account from the options menu.** The Manage Account page displays.
3. **Make any necessary changes to your contact information.**
4. **Click SUBMIT.** Your new information is saved to your UJS Web Portal account.
5. **If you updated your e-mail address, you will need to verify the address.** A new confirmation e-mail message is sent to the new address. Open the e-mail message and click on the link to confirm the e-mail address.

Adding Roles



If you are an attorney, you must have the role of Attorney added to your UJS Web Portal account. You can select this role when creating your UJS Web Portal account (see [Self-Registering Attorneys – Creating an Account](#) on page 7). However, if it was not entered upon creating your account for whatever reason, you can add the role on the Manage My Account page.

To add a role of Attorney to your UJS Web Portal account, perform the following steps:

1. **Ensure that you are logged into your UJS Web Portal Account.**



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2. **Hover your mouse over the Settings  icon in the upper right corner of the screen and select Manage My Account from the options menu.** The Manage Account page displays.
3. **Click the Add  icon above the Roles grid.** The Request Role window displays.
4. **Select a Role of Attorney from the dropdown.** Additional fields display.



NOTE: If Attorney does not display in the dropdown, this indicates you previously created a UJS Web Portal account and associated the attorney role. If you log into the UJS Web Portal for GTS or PACFile, you should use the same login for attorney registration. If you are not sure of your login, see [Recovering your User Name](#) on page 13 and [Resetting your Password](#) on page 12.

5. **Enter your PA Bar Number.**
6. **Enter the last four digits of your social security number.**
7. **Click SUBMIT.**
8. **You will receive an e-mail indicating whether the attorney information you entered has been verified.** If verified, you can now complete your registration. For information on completing your registration, see [Section 3: Self-Registering Attorneys](#) on page 19. If the information you entered does not match their records, you may need to contact the Disciplinary Board to verify the information on record. After verifying or correcting information, perform these steps again to add your role of attorney.



Removing Roles

While not necessary, you can remove your role as an attorney. If you plan on using the Attorney Registration system in subsequent years or using PACFile or GTS, removing your attorney role is not recommended.

To remove your role as an attorney, perform the following steps:

1. **Ensure that you are logged into your UJS Web Portal Account.**




2. **Hover your mouse over the Settings  icon in the upper right corner of the screen and select Manage My Account from the options menu.** The Manage Account page displays.
3. **In the Roles grid, click the Delete  icon for the role you need to remove.** A confirmation message displays.
4. **Click OK.** You are returned to the Manage Account page and your role as attorney has been removed.

Changing Your Password

You can change your password at any time.

To change your password, perform the following steps:


1. **Ensure that you are logged into your UJS Web Portal Account.**
2. **Hover your mouse over the Settings  icon in the upper right corner of the screen and select Change My Password from the options menu.** The Change My Password page displays.
3. **Enter your Current Password.**
4. **Enter your New Password.** The password must contain at least 10 characters and must contain at least three of the following requirements: a lower case character, an upper case character, a numerical character, and a special character.
5. **Confirm the password by re-entering it in the Confirm Password field.** The passwords must match.
6. **Click SUBMIT.** Your password is updated. The next time you log into the UJS Web Portal, you must use the new password to log in.

Deactivating Your UJS Web Portal Account

You can deactivate your UJS Web Portal Account if you will no longer need access. You may wish to do this if you accidentally created a duplicate account. If you plan on using the Attorney Registration system in subsequent years or using PACFile or GTS, deactivating your account is not recommended.



To deactivate your UJS Web Portal Account, perform the following steps:

1. **Ensure that you are logged into your UJS Web Portal Account.**
2. **Hover your mouse over the Settings  icon in the upper right corner of the screen and select Manage My Account from the options menu.** The Manage Account page displays.
3. **Under the Deactivate Account section, enter your password.**
4. **Click DEACTIVATE ACCOUNT.** Your UJS Web Portal Account is immediately deactivated and you are logged out.



Section 3: Self-Registering Attorneys

This section describes the features and functions of the Attorney Registration system that an attorney needs to know if they are responsible for submitting their own registration and payment.

This section includes:

[Registrations To Complete](#) (pg. 19)

[Functions of the Attorney Annual Registration Screen for Self-Registering Attorneys](#) (pg. 19)

[Updating your Pennsylvania Attorney Annual Registration Form](#) (pg. 20)

[Saving your Progress](#) (pg. 26)

[Submitting your Form](#) (pg. 26)

Registrations To Complete

Once you have created your UJS Web Portal account and your PA Bar Number has been verified by the Disciplinary Board, you are ready to begin the registration process.

Navigation

To begin the registration process, log in to the UJS Web Portal and use the navigation ribbon at the top of the page to access to My Services → Attorney Services → Attorney Annual Registration → Registrations To Complete. The Attorney Annual Registration – Registrations to Complete page displays.

Functions of the Attorney Annual Registration Screen for Self-Registering Attorneys


When the Attorney Annual Registration – Registrations to Complete screen displays, you will see a record for your attorney registration in the grid. Since you are only responsible for your own registration, only one record is displayed in the grid. You will



use the grid and the other features on the screen to update the information to include in your Attorney Annual Registration form.

Registration Responsibilities and Certification and Agreement

The Certification and Agreement link above the grid provides you with the ability to read the Certification and Agreement statement. A link within the Certification and Agreement page provides access to the Registration Responsibilities notice. Reading both of these statements is recommended.

After reading the Registration Responsibilities notice and the Certification and Agreement statement, you can acknowledge that you have read them by selecting the checkbox in the first column of the grid and clicking the Save Certification & Agreement icon  above the grid. A checkbox will subsequently display in the Certification & Agreement column in the grid to indicate the acknowledgement of these statements.

Optionally, you will also be able to view and acknowledge the Registration Responsibilities notice Certification and Agreement statement when completing your registration form. For more information, see [Updating your Pennsylvania Attorney Annual Registration Form](#) below.



Updating your Pennsylvania Attorney Annual Registration Form

When completing the Pennsylvania Attorney Annual Registration Form, it is important to ensure all information is recorded accurately. The form will include some information pre-populated based on information provided by the Disciplinary Board and some information you have provided on previous registrations, if any. Be sure to check anything that is already populated for accuracy and make any changes as needed.





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To update the information for your Attorney Annual Registration Form, perform the following steps:

1. **On the Attorney Annual Registration – Registrations to Complete page, click the View Details  icon in the far-right column of the grid.** The Attorney Annual Registration Form page displays. Review the Fee Schedule information at the top of the form page.
2. **Under the Attorney Information section, update any information as necessary:**
 - a. Verify your Attorney Status for the Registration Year displayed in the grid. The Attorney Status displayed is based on your registration from the previous year. Make another selection, if necessary. It may not be possible to change all statuses. If there is any question about the status displayed or those available in the dropdown, contact the Disciplinary Board using the information in the Contact Us section near the top of the page. The fee for the selected Attorney Status is displays within the field.
 - b. Verify your name, last four digits of your social security number, bar number, date of birth, and bar admission date in the grid. The name on record with the Disciplinary Board is displayed. If your name has changed, you can click the link at the top of this section to be forwarded to the Forms page on the Disciplinary Board’s website where you can access the Name Change Form. Follow the instructions on the form to request the change.
 - c. Select your Gender from the dropdown or select ‘Prefer Not To Answer’.
 - d. For Race and Ethnicity, select the checkboxes that are applicable or select ‘Prefer Not To Answer’. For more information on the values provided, click the Learn More  icon to the right of the field.
 - e. Verify the other details displayed in this section. If any of the information is incorrect, contact the Disciplinary Board using the information in the Contact Us section near the top of the page.
3. **Complete the Succession Planning section.** This information is used to describe the status of plans in the event of death or disability. Defender or Legal Services, Foreign Legal Consultants, and In-House Corporate Counsel attorneys will not have this section on their form page.
 - a. Select the radio button that is appropriate for your succession plan.





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- b. If you select 'In the event of my death or incapacity, I have made arrangements for another Pennsylvania attorney, who is capable of conducting and/or overseeing my legal practice, to protect the interest of my client(s)', select either 'Individual' or 'Law Firm' from the Individual/Law Firm dropdown that displays, as appropriate. Then complete the remaining fields for the individual or law firm in your succession plan.
4. The Contact Information section displays details based on your registration from the previous year. This section is used to update your current employer, addresses, phone and fax telephone numbers, and e-mail addresses. **Verify and, if needed, update your Primary Employer.** The value defaults to what you recorded on your application the previous year, if any.
 - a. If there are no law firms or organizations through which you practice, you must select the 'I do not have an employer to report' checkbox. Anything entered for the Primary Employer is cleared and the field is disabled.
 - b. If you currently practice in a different law firm or organization than the one displayed, enter the name in the Primary Employer field.
5. **Select the radio button that corresponds to the size of the law firm in which you practice.** If you do not work for a law firm, select the first radio button, '1 (solo practitioner)'. If you work for an entity that is not a law firm, select 'Not Applicable'.
6. The Addresses grid in the Contact Information section displays three address rows; one for each address that must be provided: a Mailing Address, Office Address, and Residence Address. **Verify and, if necessary, update your contact details:**
 - a. Verify the Mailing Address displayed. To use an address other than the one displayed, you may overwrite the text or select a new value in any field. Alternatively, you can click the Clear  icon in the far-right column and reenter the address information in the Country, Address lines, City, State/Territory, Zip/Postal Code, and PA County fields. If you are entering an address Location outside of the United States, make sure 'Out of Country' is selected for the PA County column.
 - b. Verify the Office Address displayed. To use an address other than the one displayed, you may overwrite or select a new value in any field. Alternatively, you can click the Clear  icon in the far-right column and reenter the address information in the Country, Address, City, State/Territory, Zip/Postal Code, and PA County fields. If you are entering






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an address Location outside of the United States, make sure 'Out of Country' is selected for the PA County column.

- c. Verify the Residence Address displayed. To use an address other than the one displayed, you may overwrite or select a new value in any field. Alternatively, you can click the Clear  icon in the far-right column and reenter the address information in the Country, Address, City, State/Territory, Zip/Postal Code, and PA County fields. If you are entering an address Location outside of the United States, make sure 'Out of Country' is selected for the PA County column.
 - d. Select the address that can be used for public access use by selecting the checkbox in the For Public Use column for the appropriate address. Either the Mailing Address or Office Address is required to be designated as your Public Access Use address. You will not be able to submit your form or payment without indicating an address as For Public Use.
 - e. Verify and, if necessary, update your Primary Telephone number.
 - f. Verify and, if necessary, update your Secondary Telephone number. You are not required to provide a secondary telephone number.
 - g. Verify and, if necessary, your Fax number. You are not required to provide a fax number.
 - h. Verify and, if necessary, update your Primary E-Mail Address.
 - i. Verify and, if necessary, update your Secondary E-mail Address. You are not required to provide a secondary e-mail address.
 - j. After reviewing and, if needed, updating any of the information in the Contact Information section, click the 'I have reviewed my contact information above and verify its accuracy' checkbox which appears below the Phone Numbers and Email Addresses grid.
- 7. Under the Jurisdictions section, update the jurisdictions in which you are licensed to practice law:**
- a. If there are no jurisdictions in which you are licensed to practice law, or this is not applicable, you must select the 'I have no jurisdictions to report' checkbox.
 - b. If any jurisdictions are displayed where you are not licensed to practice law, click the Delete  icon in that row of the grid.



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- c. To add a jurisdiction, click the Add  icon. A new, blank row displays in the grid.
 - d. Select the jurisdiction in the Court/Jurisdiction dropdown in the grid. You may type ahead in this dropdown field and click on your jurisdiction when it is displayed in the list.
 - e. If you selected 'Other' in the Court/Jurisdiction dropdown, specify your court or jurisdiction in the Specify Other field.
 - f. Select your Current Status in that court or jurisdiction from the dropdown.
 - g. Continue adding jurisdictions until they are all displayed in the grid.
8. The Financial Data section displays the financial institutions in which you or your firm held funds of clients or third persons at any time during the registration period for the previous year. If needed, a brief description is available by clicking on the question mark icons to the right of some column headers in each of the three grids. Foreign Legal Consultants and In-House Corporate Counsel attorneys will not have this section on their form page. **Verify and if necessary, update the financial institutions that will be used for the current year:**
- a. If you will not hold Pennsylvania IOLTA or Pennsylvania IOLTA Exempt funds, select the 'I do not have Pennsylvania IOLTA or Pennsylvania IOLTA Exempt accounts to report' checkbox.
 - b. If you will not hold out of state IOLTA funds, select the 'I do not have Out of State IOLTA or Out of State IOLTA Exempt accounts to report' checkbox.
 - c. If you will not hold Interest for Clients funds, select the 'I do not have Interest for Clients, Other Authorized Accounts, or Business/Operating accounts required to report' checkbox.
 - d. If the grids under the Pennsylvania IOLTA or IOLTA Exempt, Out of State IOLTA Only, or the Interest for Clients sections display any rows for financial institutions that will not be used in the current period, click the Delete  icon to remove the institutions listed in that grid row.
 - e. To add a new financial institution, click the Add  icon above the grid for the appropriate type of funds you need to add (Pennsylvania IOLTA/IOLTA Exempt in the first grid, Out of State IOLTA funds in the



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second grid, or Interest for Clients, Other Authorized Investments, or Business/Operating in the third grid).

- f. Select the Eligible Institution Type from the dropdown.
 - g. Select the Bank/Brokerage Name from the dropdown for the Pennsylvania IOLTA/IOLTA Exempt, Out of State IOLTA funds, or Interest for Clients or Other Investments grids. You may type ahead in this dropdown field and click on your financial institution when it is displayed in the list. If the Bank/Brokerage Name is not found in the list, select 'Other'.
 - h. If you selected 'Other' for the Bank/Brokerage Name, specify the name in the blank field in the Specify Other column.
 - i. Enter the Account Number for the bank or brokerage company.
 - j. Indicate if the account holds client/third party funds by selecting the appropriate value from the dropdown.
 - k. Select the Account Type from the dropdown.
 - l. Select the Bank Location (State).
 - m. Continue adding financial institutions until they are all displayed in the appropriate grids.
9. **In the Professional Liability Insurance section, indicate your professional liability status.** Read the available choices and select the radio button which indicates your status. Defender or Legal Services, Foreign Legal Consultants, and In-House Corporate Counsel attorneys will not have this section on their form page.
- a. If you indicate that you maintain liability insurance in the selection, the Insurance Carrier Name field displays and is required. Record the name of your insurance carrier in the field.
10. **In the Pro Bono Services section, indicate your interest in receiving more information on this opportunity.** You can choose to receive information from any of the three entities listed, all of them, or none at this time by selecting the appropriate checkbox or checkboxes. At least one option must be selected.
11. **In the Certification and Agreement section, indicate you have read the Certification and Agreement and Registration Responsibilities statements by selecting the 'I acknowledge the foregoing Certification and Agreement'**



checkbox. You can access the Registration Responsibilities by clicking the link in this section. After reviewing the responsibilities, close the document window or tab. The checkbox will already be selected if you acknowledged the statement in the grid on the previous page as described under [Registration Responsibilities and Certification and Agreement](#) on page 20. You will not be able to submit your form or payment without acknowledging that you have read the statements.


Saving your Progress

At any time while you are entering the information for your registration form, you can save your progress and continue at another time.

To save your progress while editing your form information, click SAVE at the bottom of the Attorney Annual Registration Form page. You are returned to the Attorney Annual Registration – Registrations To Complete page, and your registration Status displays as Not Submitted.

Continuing a Saved Form

When you are ready to continue working on your form, perform the following steps:

1. **Ensure that you are logged into your UJS Web Portal Account.**
2. **Navigate to My Services → Attorney Services → Attorney Annual Registration → Registrations To Complete.**
3. **On the Attorney Annual Registration – Registrations to Complete page, click the View Details  icon in the far-right column of the grid.** The Attorney Annual Registration Form page displays with any changes that were saved.

Submitting your Form

Once you have finished updating the information for your registration form, you are ready to begin the steps for submitting the form to the Disciplinary Board. You can submit your form from two areas of the Attorney Registration system.




Submitting your Form from the Attorney Annual Registration Form Page


If you complete the process of updating your form on the Attorney Annual Registration Form page, you can easily begin submitting the form right from that page. To submit the form, ensure all the areas of the page are completed, including acknowledgment of the Certification and Agreement statements, then click SUBMIT.

If any required information is missing, messages display on the screen indicating what needs to be completed before you can submit the form. Otherwise, your registration form is sent to the Shopping Cart where you will begin making your payment or generate a voucher to mail your payment. For more information on the shopping cart and payments, see [Section 6: Making Payments](#) on page 50.

Submitting your Form from the Registrations To Complete Page

If you saved your progress after updating all the information on the Attorney Annual Registration Form page, or if you were logged out of the Attorney Registration system automatically, it may be more convenient to submit your form from the Attorney Annual Registration – Registrations To Complete page.

On the Attorney Annual Registration – Registrations To Complete page, select the checkbox in the first column of the grid and click the Submit Registrations  icon above the grid.

If any required information is missing, a message displays on the screen indicating that the form is incomplete. You must access the Attorney Annual Registration Form page through the View Details  icon and complete it before you can submit the registration. For more information, see [Updating your Pennsylvania Attorney Annual Registration Form](#) on page 20.

Otherwise, the registration form is sent to the Attorney Registration Shopping Cart where you will begin making your payment or generate a voucher to mail your payment. For more information on the shopping cart and payments, see [Section 6: Making Payments](#) on page 50.



Section 4: Attorneys Using a Proxy to Register

This section describes how attorneys that do not register themselves assign another user of the UJS Web Portal to submit registration and payment on their behalf. Your proxy does not need to be an attorney. Before you begin, verify that the user that you will designate as your proxy has already created an account on the UJS Web Portal. You will not be able to assign someone as proxy that does not have a UJS Web Portal Account. For more information, see [Proxy Users – Creating an Account](#) on page 9.

This section includes:


[Searching for your Proxy](#) (pg. 28)

[Adding your Proxy](#) (pg. 31)

[Removing Proxies](#) (pg. 31)

Searching for your Proxy

In order to assign a proxy to act on your behalf, perform the following steps:

1. **Ensure that you are logged into your UJS Web Portal Account.**
2. **Navigate to My Services → Attorney Services → Attorney Annual Registration → Manage Proxies.** The Attorney Registration Manage Proxies page displays.
3. **Click the Add  icon above the grid.** The Add Proxy Users search page opens.

Searches can be performed by Name or PA Bar ID.



Searching for your Proxy by Name

To search for your proxy by Name, perform the following steps:

1. **Select the Search Type of 'Name' from the dropdown, if not already selected.** The fields specific for a search by name are displayed. Required fields on the search page are indicated with an asterisk (*) and must have a value entered or selected before beginning a search.
2. **Enter your proxy's Last Name.** The field is not case sensitive, but you must use the exact last name that your proxy entered when creating their UJS Web Portal account. It may be necessary to contact your proxy for exact spelling, especially for hyphenated names or other names using punctuation.
3. **Enter your proxy's First Name.** The field is not case sensitive, but you must use the exact first name that your proxy entered when creating their UJS Web Portal account. It may be necessary to contact your proxy for exact spelling, especially for hyphenated names or other names using punctuation.
4. **Enter the City of your proxy's address.** The field is not case sensitive, but you must use the exact city name that your proxy entered when creating the UJS Web Portal account. This address typically coincides with their business address. It may be necessary to contact your proxy for the exact spelling.
5. **Select the State of your proxy's address.**
6. **Click SEARCH.** If a required field was not filled out, a message displays indicating the fields that must be completed before performing the search. Add information to the missing fields and click SEARCH again.
7. **To continue, go to [Search Results](#) below.**

Searching for your Proxy by PA Bar ID

You can only search for proxies by Bar ID if they are an attorney registered in Pennsylvania. However, proxies are not required to be attorneys. If your proxy is not an attorney, perform a search by name instead as directed under [Searching for your Proxy by Name](#) above.



To search for your proxy by PA Bar ID, perform the following steps:

1. **Select the Search Type of 'PA Bar ID' from the dropdown.** The fields specific for a search by Pennsylvania bar ID are displayed. Required fields on the search page are indicated with an asterisk (*) and must have a value entered or selected before beginning a search.
2. **Enter your proxy's Pennsylvania Bar ID.** It may be necessary to contact your proxy to obtain the number.
3. **Click SEARCH.** If a required field was not filled out, a message displays indicating the fields that must be completed before performing the search. Add information to the missing fields and click SEARCH again.
4. **To continue, go to [Search Results](#) below.**

Search Results

The results of your search will be returned in the grid below the search fields.

If no UJS Web Portal accounts match your search criteria, you will receive a message that no results were found. To continue, choose one of the following options:

- Change the information entered or selected for any of the fields and click SEARCH. A new search will be performed.
- Modify your search by selecting another option from the Search Type dropdown and try the search again. For more information, see [Searching for your Proxy](#) on page 28.

If you receive results, but your proxy is not amongst the search results, choose one of the following options:


- Change the information entered or selected for any of the fields and click SEARCH. A new search will be performed.
- Modify your search by selecting another option from the Search Type dropdown and try the search again. For more information, see [Searching for your Proxy](#) on page 28.



Adding your Proxy

If your proxy is displayed in the grid, select the checkbox in the first column and click SUBMIT. On the confirmation message, click OK. You are returned to the Attorney Registration Manage Proxies page and your proxy displays in the grid. A checkmark appears for the proxy in the On My Behalf column.

Removing Proxies

If you will no longer need a particular proxy for future registrations, you can remove them from the Attorney Registration Manage Proxies page. In the grid, locate the proxy that you no longer need, indicated with a checkmark in the On My Behalf column, and click the Delete  icon in that row. Click OK on the confirmation message. They are removed from your account and can no longer complete annual registrations on your behalf.

If needed, you can add a new proxy. For more information, see [Searching for your Proxy](#) on page 28.



Section 5: Proxies Completing Registrations

This section describes how a user that has been given permission by one or more attorneys can complete annual registrations and submit payments on their behalf. For example, a law firm may designate an employee to submit all the registration forms and payments for all the attorneys at the firm. Proxies do not need to be attorneys. Proxies completing registrations for attorneys on their behalf also have the ability to perform some functions in batch in order to expedite the process and prevent data entry errors.

If you will be responsible for submitting registration forms and payments for one or more attorneys, you must begin by creating an account on the UJS Web Portal. Attorneys will not be able to add you as their proxy until you have an account. For more information, see [Proxy Users – Creating an Account](#) on page 9.

Once you have an account, the attorneys you represent must add you as their proxy as described in [Section 4: Attorneys Using a Proxy to Register](#) on page 28.

Once the attorneys have informed you that they have added you as their proxy, you can begin completing the registration forms on their behalf.

This section includes:

[Functions of the Attorney Annual Registration Screen for Proxies](#) (pg. 33)

[Updating Registration Forms for Attorneys](#) (pg. 35)

[Saving your Progress](#) (pg. 41)

[Updating Information for PA Attorneys in Batch](#) (pg. 42)

[Submitting Registration Forms for all Attorneys](#) (pg. 48)

[Removing Yourself as a Proxy from your UJS Web Portal Account](#) (pg. 49)



Functions of the Attorney Annual Registration Screen for Proxies

Once you have created your UJS Web Portal account and the attorneys you represent have added you as their proxy, you are ready to begin the registration process.

Navigation

To begin the registration process, navigate to My Services → Attorney Services → Attorney Annual Registration → Registrations To Complete. The Attorney Annual Registration – Registrations to Complete page displays.

When the Attorney Annual Registration – Registrations to Complete page opens, you will see all attorneys for which you have been granted permissions to submit registrations in the grid. You will use the grid and the other features on the screen to update the information to include for each Attorney Annual Registration form.





Tip: If your role as proxy is to submit all of the registrations and payments for your organization only and the individual attorneys must complete the form details themselves, the attorneys should refer to the steps in [Section 3: Self-Registering Attorneys](#) beginning on page 19, save their form once it is completed, and inform you that they are finished. As proxy, you can skip to [Submitting Registration Forms for all Attorneys](#) on page 48 once all the attorneys for which you proxy have indicated that they completed their forms.

Filtering Attorneys in the Grid

If you are a proxy for a large number of attorneys, it may be helpful to apply a filter to the attorneys displayed in the grid of the Attorney Annual Registration – Registrations to Complete page in order to locate specific ones. For example, if you started but did not complete a form for an attorney, you can filter by a Status of 'Not Submitted' to find all forms in progress.




To filter the attorneys displayed in the grid, click the Filter  icon above the grid. The filter popup displays. You can filter by 'City', 'Registration Type', and 'Status'. Select at least one criterion to filter by. The 'Select All' filter value can be used to toggle all the checkboxes for that filter as selected or cleared. To close the popup, click your mouse outside of the box.

To clear the filter and view all of your attorneys again, click the Filter  icon and remove any criteria by selecting 'Select All' for any filter that is displaying a value until all the values in the box are selected. Click your mouse outside of the popup to close it and view your attorneys in the grid.

The filter is not persistent. Therefore, if you log out of the UJS Web Portal or navigate to another page, your attorneys will not be filtered when you return to the Attorney Annual Registration – Registrations To Complete page.

Registration Responsibilities and Certification and Agreement

The Certification and Agreement link above the grid provides you with the ability to view the Certification and Agreement statement. A link within the Certification and Agreement page provides access to the Registration Responsibilities notice.

For each attorney for which you proxy, you will need to acknowledge that they have read the notice and statement. For attorneys for which you are a proxy, you can acknowledge them by selecting the checkboxes in the first column of the grid. Alternatively, you can click the checkbox in the column header row to select the checkboxes for all of the attorneys displayed in the grid at once. Click the Save Certification & Agreement  icon above the grid to save the selection. A checkbox will subsequently display in the Certification & Agreement column in the grid for each attorney that was selected to indicate the acknowledgement of these statements.

If your firm or organization's business process requires the attorneys to each provide their own acknowledgements of the Registration Responsibilities notice and Certification and Agreement statement, they should refer to [Functions of the Attorney Annual Registration Screen for Self-Registering Attorneys](#) on page 19 in order to perform this function themselves and save the form as described in [Saving your Progress](#) on page




26. They should then inform you when this is completed so that you can proceed with their registration and payment. Once they have acknowledged the statements, a checkbox will appear in the grid in the Certification & Agreement column for each attorney when you view the Attorney Annual Registration – Registrations to Complete page.

Updating Registration Forms for Attorneys

You will need to verify, and possibly update, the information to be included for each attorney on their registration form. When completing the Pennsylvania Attorney Annual Registration Form for each attorney, it is important to ensure all information is recorded accurately. The form will include some information pre-populated based on information that was provided on past registrations. Be sure to check anything that is already populated for accuracy and make any changes as needed.

If you are a proxy for more than one PA attorney, you can choose to update the financial institutions, professional liability insurance, and employer information in batch. For more information, see [Updating Information for PA Attorneys in Batch](#) on page 42. The remaining information that is included on the attorney registration form will need to be updated for each individual attorney for which you proxy.


To update the registration form information for your attorneys, perform the following steps:

1. **On the Attorney Annual Registration – Registrations to Complete page, click the View Details  icon in the far-right column of the grid.** The Attorney Annual Registration Form page displays. If necessary, review the Fee Schedule information at the top of the form page.
2. **Under the Attorney Information section, update any information necessary for the attorney:**
 - a. Verify the Attorney Status for the Registration Year displayed in the grid. The Attorney Status displayed is based on their registration from the previous year. Make another selection, if necessary. It may not be possible to change all statuses. If there is any question about the status displayed or those available in the dropdown, contact the Disciplinary






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Board using the information in the Contact Us section near the top of the page. The fee for the selected Attorney Status is displays within the field.

- b. Verify the attorney's name, last four digits of their social security number, bar number, date of birth, and bar admission date in the grid. The name on record with the Disciplinary Board for the attorney is displayed. If their name has changed, you can click the link in this section to be forwarded to the Forms page on the Disciplinary Board's website where you can access the Request for Name Change form. Follow the instructions on the form to request the change.
 - c. Select the Gender of the attorney from the dropdown or select 'Prefer Not To Answer'.
 - d. For Race and Ethnicity, select the checkboxes that are applicable or select 'Prefer Not To Answer'. For more information on the values provided, click the Learn More  icon to the right of the field.
 - e. Verify the other details displayed in this section. If any of the information is incorrect, contact the Disciplinary Board using the information in the Contact Us section near the top of the page.
3. **Complete the Succession Planning section.** This information is used to describe the status of plans for the attorney in the event of their death or disability. Defender or Legal Services, Foreign Legal Consultants, and In-House Corporate Counsel attorneys will not have this section on their form page.
 - a. Select the radio button that is appropriate for your succession plan.
 - b. If you select 'In the event of my death or incapacity, I have made arrangements for another Pennsylvania attorney, who is capable of conducting and/or overseeing my legal practice, to protect the interest of my client(s)', select either Individual or Law Firm from the dropdown that displays, as appropriate. Then complete the remaining fields for the individual or law firm in the succession plan.
4. The Contact Information section displays details for the attorney based on their registration from the previous year. This section is used to update their current employer, addresses, phone and fax telephone numbers, and e-mail addresses. **Verify and, if needed, update the Primary Employer.** The value defaults to what was recorded for the attorney the previous year. The field may already be completed if you used the batch function as described under [Updating Information for PA Attorneys in Batch](#) on page 42.





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- a. If there are no law firms or organizations through which your attorney practices, you must select the 'I do not have an employer to report' checkbox. Anything entered for the Primary Employer is cleared and the field is disabled.
 - b. If the attorney currently practices in a different law firm or organization than the one displayed, enter the name in the Primary Employer field.
5. **Select the radio button that corresponds to the size of the law firm in which your attorney practices.** If your attorney does not work for a law firm, select the first radio button, '1 (solo practitioner)'. If your attorney works for an entity that is not a law firm, select 'Not Applicable'.
6. The Addresses grid in the Contact Information section displays three address rows; one for each address that must be provided: a Mailing Address, Office Address, and Residence Address. **Verify and, if necessary, update the attorney's contact details:**
- a. Verify the Mailing Address displayed. To use an address other than the one displayed, you may overwrite the text or select a new value in any field. Alternatively, you can click the Clear  icon in the far-right column and reenter the address information in the Country, Address lines, City, State/Territory, Zip/Postal Code, and PA County fields. If you are entering an address Location outside of the United States, make sure 'Out of Country' is selected for the PA County column.
 - b. Verify the Office Address displayed. To use an address other than the one displayed, you may overwrite the text or select a new value in any field. Alternatively, you can click the Clear  icon in the far-right column and reenter the address information in the Country, Address, City, State/Territory, Zip/Postal Code, and PA County fields. If you are entering an address Location outside of the United States, make sure 'Out of Country' is selected for the PA County column.
 - c. Verify the Residence Address displayed. To use an address other than the one displayed, you may overwrite or select a new value in any field. Alternatively, you can click the Clear  icon in the far-right column and reenter the address information in the Country, Address, City, State/Territory, Zip/Postal Code, and PA County fields. If you are entering an address Location outside of the United States, make sure 'Out of Country' is selected for the PA County column.





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- d. Select the address that can be used for public access use by selecting the checkbox in the For Public Use column for the appropriate address. Either the Mailing Address or Office Address is required to be designated as the Public Access Use address. You will not be able to submit the form or payment without indicating an address as For Public Use.
 - e. Verify and, if necessary, update the attorney's Primary Telephone number.
 - f. Verify and, if necessary, update the attorney's Secondary Telephone number. You are not required to provide a secondary telephone number.
 - g. Verify and, if necessary, update the attorney's Fax number. You are not required to provide a fax number.
 - h. Verify and, if necessary, update the attorney's Primary E-Mail Address.
 - i. Verify and, if necessary, update the attorney's Secondary E-mail Address. You are not required to provide a secondary e-mail address.
 - j. After reviewing and, if needed, updating any of the information in the Contact Information section, click the 'I have reviewed my contact information above and verify its accuracy' checkbox which appears below the Phone Numbers and Email Addresses tab.
- 7. Under the Jurisdictions section, update the jurisdictions in which the attorney is licensed to practice law:**
- a. If there are no jurisdictions in which the attorney is licensed to practice law, or this is not applicable, you must select the 'I have no jurisdictions to report' checkbox.
 - b. If any jurisdictions are displayed in which they are not licensed to practice law, click the Delete  icon in that row of the grid.
 - c. To add a jurisdiction, click the Add  icon. A new, blank row displays in the grid.
 - d. Select the jurisdiction in the Court/Jurisdiction dropdown in the grid. You may type ahead in this dropdown field and click on the jurisdiction when it is displayed in the list.
 - e. If you selected 'Other' in the Court/Jurisdiction dropdown, specify the attorney's court or jurisdiction in the Specify Other field.



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- f. Select their Current Status in that court or jurisdiction from the dropdown.
 - g. Continue adding jurisdictions until they are all displayed in the grid.
8. The Financial Institutions section displays the financial institutions in which your attorney or their firm held funds of clients or third persons at any time during the registration period for the previous year. If needed, a brief description is available by clicking on the question mark icons to the right of some of the column headers in the grid. Foreign Legal Consultants and In-House Corporate Counsel will not have this section on their form page. **Verify and if necessary, update the financial institutions that will be used for the current year:**
- a. If the attorney will not hold Pennsylvania IOLTA or Pennsylvania IOLTA exempt or interest for clients funds, select the 'I do not have Pennsylvania IOLTA or Pennsylvania IOLTA Exempt accounts to report' checkbox.
 - b. If the attorney will not hold out of state IOLTA funds, select the 'I do not have Out of State IOLTA or Out of State IOLTA Exempt accounts to report' checkbox.
 - c. If the attorney will not hold interest for clients funds, select the 'I do not have Interest for Clients, Other Authorized Accounts, or Business/Operating accounts required to report' checkbox.
 - d. If the grids under the Pennsylvania IOLTA or IOLTA Exempt, Out of State IOLTA Only, or the Interest for Clients sections display any rows for financial institutions that will not be used by your attorney or firm in the current period, click the Delete  icon to remove the institutions listed in that grid row.
 - e. To add a new financial institution, click the Add  icon above the grid for the appropriate type of funds (Pennsylvania IOLTA/IOLTA Exempt in the first grid, Out of State IOLTA funds in the second grid, or Interest for Clients, Other Authorized Investments, or Business/Operating in the third grid).
 - f. Select the Eligible Institution Type from the dropdown.
 - g. Select the Bank/Brokerage Name from the dropdown for Pennsylvania IOLTA/IOLTA Exempt funds grid, Out of State IOLTA funds, or Interest for Clients or Other Investments grids You may type ahead in this dropdown field and click on the financial institution when it is displayed in the list. If the Bank/Brokerage Name is not found in the list, select 'Other'.



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- h. If you selected 'Other' for the Bank/Brokerage Name, specify the name in the blank field in the Specify Other column.
 - i. Enter the Account Number for the bank or brokerage company.
 - j. Indicate if the account holds client/third party funds by selecting the appropriate value from the dropdown.
 - k. Select the Account Type from the dropdown.
 - l. Select the Bank Location (State).
 - m. Continue adding financial institutions for your attorney until they are all displayed in the appropriate grids.
9. **Use the Professional Liability Insurance section to indicate the status for your PA attorney.** The information in this section may already be completed if you used the batch function as described under [Updating Information for PA Attorneys in Batch](#) on page 42. If not, read the available choices and select the radio button which indicates the appropriate status for your attorney. Defender or Legal Services attorneys, Foreign Legal Consultants, and In-House Corporate Counsel will not have this section on their form page.
 - a. If you indicate that your attorney maintains liability insurance in the selection, the Insurance Carrier Name field displays and is required. Record the name of your insurance carrier in the field.
10. **In the Pro Bono Services section, indicate the attorney's interest in receiving more information on this opportunity.** They can choose to receive information from any of the three entities listed, all of them, or none at this time by selecting the appropriate checkbox or checkboxes. At least one option must be selected.
11. **In the Certification and Agreement section, acknowledge the statement by selecting the checkbox.** If needed, you can access the Registration Responsibilities by clicking the link in this section. The checkbox will already be selected if this was previously acknowledged according to the steps under [Registration Responsibilities and Certification and Agreement](#) on page 34. You will not be able to submit the form or payment for your attorney without acknowledging the statement.
12. **If you have additional registration forms to complete for other attorneys, click SAVE at the bottom of the page in order to return to the Attorney**



Annual Registration – Registrations To Complete page. Repeat the steps in this section for your next attorney until the registration forms for each attorney are completed. **Otherwise, if you are the proxy for only one attorney, you can submit the form and begin the payment process by clicking SUBMIT.** See [Section 6: Making Payments](#) on page 50 for information on proceeding to payment.


Saving your Progress

At any time while you are entering the information for one of your attorneys, you can save your progress and continue at another time. When you return to the form, any information you have changed is saved and you can continue working on updating your information.

To save your progress while editing a form, click SAVE at the bottom of the Attorney Annual Registration Form page. You are returned to the Attorney Annual Registration – Registrations To Complete page, and your attorney's registration Status displays as Not Submitted.

Continuing a Saved Form

When you are ready to continue working on your forms, perform the following steps:

1. **Ensure that you are logged into your UJS Web Portal Account.**
2. **Navigate to My Services → Attorney Services → Attorney Annual Registration → Registrations To Complete.**
3. **On the Attorney Annual Registration – Registrations to Complete page, click the View Details  icon in the far-right column of the grid for the attorney which you previously started.** Their Attorney Annual Registration Form page displays with any changes that were saved.





Updating Information for PA Attorneys in Batch

If you are submitting registration forms for more than one PA attorney, you can specify the financial institutions, professional liability insurance information, employer, and the office address for your attorneys in batch. Additionally, this function provides an additional method for marking the Certification and Agreement for each attorney in batch. The batch function can save time and potential data entry errors.



You are not required to use all of the sections available on the Attorney Registration Batch Update screen. In some instance, it may be easier to update some information on attorneys within their individual registration forms. You can choose which sections to complete based on what is most efficient for the information and attorneys you need to update.







To update information for attorneys in batch, perform the following steps:

1. **Navigate to My Services → Attorney Services → Attorney Annual Registration → Batch Update.**
2. The Financial Institutions section provides brief information about the details that can be recorded on the screen. **If needed, review the information described in the Financial Institutions section.**
3. The Pennsylvania IOLTA or Pennsylvania IOLTA Exempt section is used to record all accounts within the state of Pennsylvania in which the attorney or their employer held funds for clients or parties. **Verify and, if necessary, update the PA IOLTA account details for the current year:**
 - a. If none of the attorneys for which you are proxy will hold Pennsylvania IOLTA or IOLTA exempt funds, skip to Step 4.
 - b. If any financial institutions needed for any attorney do not display in the Pennsylvania IOLTA or Pennsylvania IOLTA Exempt funds section, click the Add  icon above the grid. Record the bank or brokerage details in the grid and click the Save  icon. Repeat this step for any additional banks or brokerages that are needed for any attorneys until they are all displayed in the grid.
 - c. If a financial institution displays in the grid that is not needed for some of the attorneys for which you proxy, select the checkbox in the first column











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for that row, click the Three Lines Menu  icon above the grid, and select the Select Attorneys to Remove Accounts From  option from the menu. In the Registrations to Update screen, select the checkboxes in the first column of the grid for individual attorneys that no longer use the financial institution, or select the checkbox in the first column header to select all of the attorneys, and click SUBMIT. Click OK on the confirmation message.

- d. (Optional) If you removed a financial institution from attorney for which you proxy and it is no longer needed, you can remove it from the grid by clicking the Delete  icon for that row. Click OK on the confirmation message. Click OK again. This will ensure this financial institution is not subsequently added to an attorney record by accident.
 - e. To add IOLTA or IOLTA exempt funds to any attorneys for which you proxy, select the checkbox in the first column for those rows and click the Three Lines Menu  icon above the grid. There are two options in the menu to add the accounts. To keep any existing accounts for the attorneys on their registration forms and append the accounts you selected, click Select Attorneys To Add Accounts To  option. To replace any and all existing financial institutions for the attorneys with the accounts you selected, click Select Attorneys to 'Force Match'  option instead. In the Registrations to Update screen, select the checkboxes in the first column of the grid for individual attorneys that should receive the financial institutions you selected, or select the checkbox in the first column header to select all of the attorneys, and click SUBMIT. Click OK on the confirmation message.
4. The Out of State IOLTA or Out of State IOLTA Exempt Only section is used to record all accounts outside the state of Pennsylvania in which the attorney or their employer held funds for clients or parties. **Verify and, if necessary, update the Out of State IOLTA Only account details for the current year:**
- a. If none of the attorneys for which you are proxy will hold out of state IOLTA or IOLTA exempt funds, skip to Step 5.
 - b. If any financial institutions needed for any attorney do not display in the Out of State IOLTA or Out of State IOLTA Exempt Only section, click the Add  icon above the grid. Record the bank or brokerage details in the grid and click the Save  icon. Repeat this step for any additional banks or brokerages that are needed for any attorneys until they are all displayed in the grid.










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- c. If a financial institution displays in the grid that is not needed for some of the attorneys for which you proxy, select the checkbox in the first column for that row, click the Three Lines Menu  icon above the grid, and select the Select Attorneys to Remove Accounts From  option from the menu. In the Registrations to Update screen, select the checkboxes in the first column of the grid for individual attorneys that no longer use the financial institution, or select the checkbox in the first column header to select all of the attorneys, and click SUBMIT. Click OK on the confirmation message.
 - d. (Optional) If you removed a financial institution from attorney for which you proxy and it is no longer needed, you can remove it from the grid by clicking the Delete  icon for that row. Click OK on the confirmation message. Click OK again. This will ensure this financial institution is not subsequently added to an attorney record by accident.
 - e. To add out of state IOLTA or IOLTA exempt funds to any attorneys for which you proxy, select the checkbox in the first column for those rows and click the Three Lines Menu  icon above the grid. There are two options in the menu to add the accounts. To keep any existing accounts for the attorneys on their registration forms and append the accounts you selected, click Select Attorneys To Add Accounts To  option. To replace any and all existing financial institutions for the attorneys with the accounts you selected, click Select Attorneys to 'Force Match'  option instead. In the Registrations to Update screen, select the checkboxes in the first column of the grid for individual attorneys that should receive the financial institutions you selected, or select the checkbox in the first column header to select all of the attorneys, and click SUBMIT. Click OK on the confirmation message.
5. The Interest for Clients, Other Authorized Accounts or Business/Operating section is used to record all other (non-IOLTA) accounts in which the attorney or their employer held funds for clients or parties. **Verify and, if necessary, update the Interest for Clients, Other Authorized Accounts or Business/Operating account details for the current year:**
 - a. If none of the attorneys for which you are proxy will hold additional accounts, skip to Step 6.
 - b. If any financial institutions needed for any attorney do not display in the Interest for Clients, Other Authorized or Business/Operating section, click the Add  icon above the grid. Record the bank or brokerage details in the grid and click the Save  icon. Repeat this step for any additional




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banks or brokerages that are needed for any attorneys until they are all displayed in the grid.

- c. If a financial institution displays in the grid that is not needed for some of the attorneys for which you proxy, select the checkbox in the first column for that row, click the Three Lines Menu  icon above the grid, and select the Select Attorneys to Remove Accounts From  option from the menu. In the Registrations to Update screen, select the checkboxes in the first column of the grid for individual attorneys that no longer use the financial institution, or select the checkbox in the first column header to select all of the attorneys, and click SUBMIT. Click OK on the confirmation message.
 - d. (Optional) If you removed a financial institution from attorney for which you proxy and it is no longer needed, you can remove it from the grid by clicking the Delete  icon for that row. Click OK on the confirmation message. Click OK again. This will ensure this financial institution is not subsequently added to an attorney record by accident.
 - e. To add accounts to any attorneys for which you proxy, select the checkbox in the first column for those rows and click the Three Lines Menu  icon above the grid. There are two options in the menu to add the accounts. To keep any existing accounts for the attorneys on their registration forms and append the accounts you selected, click Select Attorneys To Add Accounts To  option. To replace any and all existing financial institutions for the attorneys with the accounts you selected, click Select Attorneys to 'Force Match'  option instead. In the Registrations to Update screen, select the checkboxes in the first column of the grid for individual attorneys that should receive the financial institutions you selected, or select the checkbox in the first column header to select all of the attorneys, and click SUBMIT. Click OK on the confirmation message.
- 6. If one or more financial institution types are not used by the attorneys for which you are a proxy, select the checkboxes for the appropriate type, save your selections, and select the applicable attorneys:**
- a. Select one of the appropriate types of accounts that are not held by one or more attorneys for which you proxy in the No Financial Accounts to Report Acknowledgement, If Applicable grid.
 - b. To assign the attorneys for which this type applies, click the Select Attorneys to Set Options  icon above the grid.






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- c. In the Registrations to Update screen, select the checkboxes in the first column of the grid for individual attorneys to which the selected value applies, or select the checkbox in the first column header to select all of the attorneys.
 - d. Click SUBMIT. Click OK on the confirmation message.
 - e. Repeat these steps as needed if you have different selections to record for other attorneys.
- 7. Use the Professional Liability Insurance section to indicate the status for the attorneys:**
- a. Read the available choices and select the radio button which indicates the appropriate status for one or more attorneys for which you are a proxy.
 - b. If you indicate that liability insurance is maintained by your selection, the Insurance Carrier Name field displays and is required. Record the name of the insurance carrier in the field.
 - c. To assign the attorneys for which this status and insurance carrier applies, click the Select Attorneys to Set Options  icon above the grid.
 - d. In the Registrations to Update screen, select the checkboxes in the first column of the grid for individual attorneys for which the selected liability insurance status and carrier applies, or select the checkbox in the first column header to select all of the attorneys.
 - e. Click SUBMIT. Click OK on the confirmation message.
 - f. Repeat these steps as needed if you have different selections or insurance carriers to record for other attorneys.
- 8. Update the Primary Employer for attorneys for which you proxy:**
- a. If the primary employer is already displayed correctly in the grid, skip to the next step. Otherwise, enter or replace the primary employer in the grid.
 - b. Under the Law Firm Size column, select the value from the dropdown that corresponds to the size of the law firm in which your attorneys practice. If an attorney does not work for a law firm, select the first radio button, '1 (solo practitioner)'. If the attorneys work for an entity that is not a law firm, select 'Not Applicable'.



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- c. To assign the attorneys for which the employer and law firm size applies, click the Select Attorneys to Set Options  icon above the grid.
 - d. In the Registrations to Update screen, select the checkboxes in the first column of the grid for individual attorneys for which the primary employer and law firm size applies, or select the checkbox in the first column header to select all of the attorneys.
 - e. Click SUBMIT. Click OK on the confirmation message.
 - f. Repeat these steps as needed if you have attorneys with different primary employers or law firm size selections.
- 9. Update the Office Address used by the attorneys for which you proxy:**
- a. If the address is already displayed correctly in the grid, skip to the next step. Otherwise, enter or replace the address information in the Country, Address Line 1, Address Line 2, City, State/Territory, Zip/Postal Code, and PA County fields. If you are entering an address Location outside of the United States, make sure 'Out of Country' is selected for the PA County column.
 - b. If the office address should be used designated for public use, select the For Public Use checkbox in the grid. Otherwise, ensure this checkbox is cleared.
 - c. Click the Save  icon in the grid.
 - d. To assign the attorneys for which the office address applies, click the Select Attorneys to Set Options  icon above the grid.
 - e. In the Registrations to Update screen, select the checkboxes in the first column of the grid for individual attorneys for which the address applies, or select the checkbox in the first column header to select all of the attorneys.
 - f. Click SUBMIT. Click OK on the confirmation message.
 - g. Repeat these steps as needed if you have different office addresses to record for other attorneys (ex. attorneys operating in different suites in the same location or your law firm operates out of different physical address locations).



10. Select the Certification and Agreement statements for the attorneys for which you proxy:
 - a. Select the checkbox in the Certification And Agreement section.
 - b. To assign the attorneys for which the acknowledgement applies, click the Select Attorneys to Set Options  icon above the grid.
 - c. In the Registrations to Update screen, select the checkboxes in the first column of the grid for individual attorneys to record their acknowledgement of the statements, or select the checkbox in the first column header to select all of the attorneys.
 - d. Click SUBMIT. Click OK on the confirmation message.
 - e. If needed, repeat these steps for any remaining attorneys that need to acknowledge the statements.

Submitting Registration Forms for all Attorneys

Once you have finished updating the information for your attorneys, you are ready to begin the steps for submitting the forms to the Disciplinary Board and making the payment. While you can choose to submit some attorneys at another time, it is recommended that all attorneys be submitted at the same time when paying online to avoid paying more than one convenience fee.


You can submit the registration forms for all attorneys at the same time from the Attorney Annual Registration – Registrations To Complete page.

Ensure that the Registration Responsibilities and Certification and Agreement checkboxes are selected for each of the attorneys in the grid. If not, see [Registration Responsibilities and Certification and Agreement](#) on page 34.

Next, select the checkbox in the grid to the left of each attorney's name that is ready to be submitted. Alternatively, you can click the checkbox in the first column header to



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select all of the attorneys in the grid. Click the Submit Registrations  icon above the grid.

If any required information is missing for one or more attorneys, a message displays in the grid row for the affected attorney indicating the forms that are incomplete. You must access the Attorney Annual Registration Form page for each attorney that displays the incomplete message and complete it before you can submit the registration. For more information, see [Updating Registration Forms for Attorneys](#) on page 35.

Otherwise, the registration forms are sent to the Attorney Registration Shopping Cart where you will begin making the payment or can generate a voucher to mail the payment. For more information on the shopping cart and payments, see [Section 6: Making Payments](#) on page 50.

Removing Yourself as a Proxy from your UJS Web Portal Account

If you will no longer act as a proxy for one or more attorneys, you can remove them from your UJS Web Portal account. Once removed, they will no longer display in the grid on the Registrations to Complete page. To remove your proxy designation, perform the following steps:

1. **Ensure that you are logged into your UJS Web Portal Account.**
2. **Navigate to My Services → Attorney Services → Attorney Annual Registration → Manage Proxies.** The Attorney Registration Manage Proxies page displays. Attorneys that have designated you to complete their registrations on their behalf display a checkmark in the I Can Proxy For column.
3. **Click the Remove  icon for any record displayed which is no longer needed.** If the person you intended to remove is not displayed in the grid, then they may already have already removed you as their proxy from their UJS Web Portal Account (see [Removing Proxies](#) on page 31).



Section 6: Making Payments

After completing and submitting registration forms, you will be taken to the shopping cart. The shopping cart provides the ability to review the registrations that will be paid and then choose to pay online or print a voucher to mail payment with a check.

This section includes:

[Shopping Cart](#) (pg. 50)

[Paying Online](#) (pg 51)

Shopping Cart

The shopping cart displays the attorney registration forms that will be submitted for payment. The grid displays the total amount due for each attorney and the total for all attorneys, if registrations are being submitted for multiple attorneys.

For attorneys registering with a status of Retired, the shopping cart displays a zero balance if submitting the registration prior to accruing any late fees. Select the 'Confirm' radio button below the grid and click OK to complete your registration. If needed, you can print a copy of your registration form for your records from the Submitted Registrations screen. For information on generating the form, see [Viewing Vouchers, Submitted Registrations, and Receipts](#) on page 56. If you are registering as Retired but have incurred a late fee, you must continue to making a payment in order to complete your registration.

Verify the information in the grid before continuing. If you are a proxy and one or more attorneys are missing from the shopping cart, you should click CANCEL and ensure that each attorney is selected before continuing to the shopping cart. For information on completing registrations for attorneys for which you proxy, see [Section 5: Proxies Completing Registrations](#) on page 32.



Paying Online

Paying online provides the convenience because there is no need to mail anything, payment can be made any time 24 hours a day, and your registration renewal is effective immediately. The online payment process gathers the information needed for payment, including payment method, billing address and contact information.

To process your payment, perform the following steps:

1. **On the Attorney Registration Shopping Cart, select the Pay Online radio button.**



NOTE: Once you have selected to either pay online or mail your payment, you cannot change to the other method. **Be sure of the method you wish to use before continuing.**

2. **Click OK.**
3. Review the payment details displayed. **A 2.75% convenience fee is added to your total payment amount.**
4. **In the payer and billing information fields display, enter the name and address where the statement for the credit/debit card is received.** Use the following guidelines to enter the name and address:
 - a. For the First Name and Last Name, enter the payer's name as it appears on the credit or debit card.
 - b. For the Street Address, enter your full address. A second line is provided for longer addresses and can also be used to specify an apartment number. However, these should match what is on the bank statement for the credit/debit card.
 - c. For the City, enter the full name of the city or town as it appears on your bank statement. Do not use any abbreviations.
 - d. Select your state, province, or region from the State dropdown.
 - e. For the Zip Code, enter a valid US postal zip code. For foreign billing addresses, enter a valid postal code for your country.



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- f. Enter your Phone Number. This information is necessary in order to contact you if there is any question about a payment.
 - g. Enter your Email Address. Be sure to enter a correct and valid e-mail address. This address will be used to send your payment confirmation number. Your confirmation number is required if you need to make any inquiries about your transaction.
5. **Click CONTINUE.**
6. The payment details screen displays. This screen is used to collect your credit/debit card payment information. **Enter your payment information:**
- a. The Email address displays based on what was entered on the shopping cart. Verify the information. If needed, click Edit to modify the e-mail address. Be sure to enter a correct and valid e-mail address. This address will be used to send your payment confirmation number. Your confirmation number is required if you need to make any inquiries about your transaction.
 - b. Enter your 16-digit Card Number. Do not enter any spaces between numbers even if displayed on your card.
 - c. Enter the CVV, which is the security code for your credit card. The code has four digits found on the front of the card for American Express cards and three digits found on the back of the card for all others.
 - d. Enter the Exp. Date (expiration date) of the credit card using the MM/YY format (ex. 01/23)
 - e. Verify the Name on Card. The Name on Card displayed is based on what was entered on the Checkout screen as the First Name and Last Name. If needed, overwrite the name of the payer to match what is on the statement for the bank or credit card company.
 - f. Verify the Billing Address. The Billing Address displayed is based on what was entered on the Checkout screen. If the Billing Address does not match what your bank or credit card has on file, your payment may be declined. If the Billing Address is incorrect, you must click the X in the upper-right corner to return to the Checkout screen and make any changes before continuing.



Mailing a Payment

The Attorney Annual Registration site provides the option to submit payment using a check which is mailed with a voucher that is generated after submitting your online registration.




NOTE: Your attorney registration is NOT COMPLETE until the voucher and the total payment for the amount due is received by the disciplinary board. The post mark date is not used to calculate the final registration amount due. Allow enough time for the payment to arrive in the mail to the disciplinary board.

To process your payment, perform the following steps:

1. **On the Attorney Registration Shopping Cart, select the Pay by Mail button.**



NOTE: Once you have selected to either pay online or mail your payment, you cannot change to the other method. **Be sure of the method you wish to use before continuing.**

2. **Click OK.**
3. **Confirm your intention to pay by mail.** If you are sure you wish to mail your payment, click OK on the confirmation message. Otherwise, click CANCEL to use the Pay Online option in the shopping cart instead.
4. The Attorney Annual Registration – Voucher page displays with all of your voucher details and payment instructions. **Click Print  icon at the top of the page.**
5. The Print dialog box for your browser or computer displays. **Select your printer and print settings and click the print button as provided by the dialog box (OK, PRINT, etc.).**
6. **Make checks payable to “Attorney Registration”.** Checks must be drafted from a US bank and in US dollars. Write the check out in the amount shown on the voucher based on the date when you are submitting the payment.
7. **Write the voucher number on the check for easy reference.** The voucher number is printed on the voucher under the barcode at the top.



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8. Mail the voucher and the check to the following:

Attorney Registration
Attn: Voucher Payment
601 Commonwealth Avenue, Suite 5600
PO Box 62625
Harrisburg, PA 17106-2625


If you need to view or reprint the registration form or voucher at another time, this can be accomplished on the Submitted Registrations page. For more information, see [Viewing Vouchers, Submitted Registrations, and Receipts](#) on page 56.






Section 7: Additional Information



Viewing Vouchers, Submitted Registrations, and Receipts

After you have successfully submitted the registration form, you can view submitted registration forms or view the voucher any time you are logged into the UJS Web Portal by navigating to My Services → Attorney Services → Attorney Annual Registration → Submitted Registrations.

Individual attorneys will only see the record for their form and payment for each year in which the online registration system was used. To view a completed registration form, click the View Form  icon. The Annual Registration Form opens in Adobe Reader. This may open in a new tab or a new window in your browser. If you choose to, print the form for your records.

To view a summary of the payment or the voucher, click View Receipt  icon. A summary of the registration displays in a grid. Use the print function of your browser if you choose to print the receipt. If you opted to pay by mail with a voucher the Attorney Annual Registration – Voucher screen displays instead. If needed, print the form by clicking the Print  icon at the top.

Attorneys that use a proxy to submit their registration and payment will also only see one record for their form and payment for each year in which the online registration was used. However, when you click the View Receipt  icon, the receipt displays the list of any other attorneys that were registered at the same time.

Proxies who submitted registrations and payments for more than one attorney will see a record for completed registrations for each of their attorneys for each year in which they were their proxy for online registration. You can view and print each individual Attorney Annual Registration Form by clicking on the View Form  icon for each attorney. To view the receipt, you can click the View Receipt  icon for any attorney.



Donating to IOLTA

If you would like to make a donation to IOLTA, you can click the Donate To Support Civil Legal Aid via IOLTA link available on the Attorney Annual Registration – Receipt or Attorney Annual Registration – Voucher screens.

Help and Support

Additional assistance with the UJS Web Portal, the checkout process, and attorney registration are quickly and easily available in a variety of formats.

Video Tutorials

Step-by-step tutorials are available on creating a UJS Web Portal account and the entire attorney registration process. Each video is broken down into segments which you can use to skip to the portion of the video you are interested in, or you can view the videos from start to finish to review the entire process.

To access the video tutorials, navigate to Help & Support → Video Tutorials. The tutorials page opens in a new tab or browser window. Click on the topic which you want to learn more about, such as Attorney Registration. When the tutorial page opens, click the WATCH NOW button for the video or videos you would like to watch. Several videos are available, depending on what part of the process you are interested in.

Help Center

The Help Center answers frequently asked questions and provides troubleshooting assistance with common UJS Web Portal issues. If one suggestion does not solve your issue, alternatives are often provided to help you address your issue a different way.

To access the Help Center, navigate to Help & Support → Help Center or click the Help Center link near the bottom of each page of the UJS Web Portal.

Pennsylvania Attorney Annual Registration Form Assistance

If you have any question about the information you need to provide on the Pennsylvania Attorney Annual Registration Form, contact the Attorney Registration Office at atty.registration@pacourts.us.