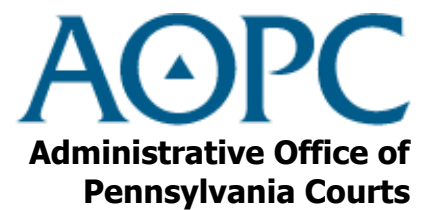

Attorney Registration System User Guide

July 12, 2021



<https://ujportal.pacourts.us>

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Conventions Used in this User Guide

Buttons All buttons found in the Attorney Registration System will be designated in all capital letters in this user guide.

Example: SAVE

Field Names All field names found in the Attorney Registration System will be designated in title case in this user guide.

Example: First Name

Fields names that are long or have mixed capitalization will be shown in quotes.

Example: "Use my Billing Address"

Cross - References All references to other parts of the user guide will be in italics and blue underlined fonts. This indicates that they are a link to that part of the document. Click on the link to go to that part of the document.

Example: see [Section 3: Making Payments](#)

Section 1: Introduction

Welcome

This user guide details the steps needed for attorneys to complete registrations using the Attorney Registration web interface 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.

Site Requirements

The Pennsylvania Unified Judicial System (UJS) Portal Web site requires a current Internet browser with JavaScript and cookies enabled to access the e-Services functions. Other browsers, including the Edge browser, and 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, Internet Explorer 11 and above will provide the most satisfying user experience. The reporting functions on the site require Adobe Acrobat Reader. Please be advised that if you are running pop-up blockers, you may be unable to view all of the pages and reports on this site.

Navigation

Open your Internet browser and enter the following web address:

<https://ujportal.pacourts.us>

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 access account is needed in order to access the attorney registration functions. Individual attorneys must create an account in order 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. 2)

[Proxy Users – Creating an Account](#) (pg. 3)

[Logging into the UJS Web Portal](#) (pg. 5)

[Resetting your Password](#) (pg. 5)

[Managing your UJS Web Portal Account](#) (page 6)

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 7.

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/Initial, 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, 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 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 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. **Click SUBMIT.**
12. **Login with your newly established credentials.** Click the link displayed on the Verification Complete page.
13. **On the Account Login page, enter your User Name and Password.**
14. **Click Login.**
15. **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.
16. **On the Request Role window, select a Role of Attorney from the dropdown.** Additional fields display.
17. **Enter your PA Bar Number.**
18. **Enter the last four digits of your social security number.**
19. **Click SUBMIT.**
20. 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 7).

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. It should be noted that you may already have a UJS Web Portal account if

Section 2: UJS Web Portal Access Accounts

you have used or registered for Guardianship Tracking System (GTS). You do not need to create an account if you are already registered for GTS or have created an account as a proxy for attorneys in a previous year.

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/Initial, 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 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.
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 7).

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 early May 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.

Section 2: UJS Web Portal Access Accounts

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 up to four 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 e-mail message.** A verification e-mail is sent to the e-mail address. 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. **Login with your new password.**

Recovering your User Name

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

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.**
6. **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.
7. **Return to the UJS Web Portal to login.**

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 17. For information on managing the users you can proxy for, see [Removing Attorneys from](#)

[your UJS Web Portal Account](#) on page 28. 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. **Under the Account Information section, make any necessary changes to your contact information.**
4. **Click UPDATE.** 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 in order 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 2). 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.**
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.
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 10](#). 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

Section 2: UJS Web Portal Access Accounts

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, 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. If you plan on using the Attorney Registration system in subsequent years or using PACFile, 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.

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. 10)

[Functions of the Attorney Annual Registration Screen for Self-Registering Attorneys](#) (pg. 10)

[Updating your Pennsylvania Attorney's Annual Fee Form](#) (pg. 11)

[Saving your Progress](#) (pg. 14)

[Submitting your Form](#) (pg. 15)

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 navigate to My Services → Attorney Annual Registration → Registrations To Complete. The Attorney Annual Registration page displays.

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

When the Attorney Annual Registration 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

These two links above the grid provide you with the ability to read the Registration Responsibilities notice and the Certification and Agreement statement.

After reading the Registration Responsibilities notice and the Certification and Agreement statement, you can acknowledge that you have read them by selecting the checkboxes in the grid under the Registration Responsibilities and Certification & Agreement columns. Click SAVE RESP. AND CERT. SELECTIONS to save the acknowledgements in the grid.

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's Annual Fee Form](#) below.

Updating your Pennsylvania Attorney's Annual Fee Form

When completing the Pennsylvania Attorney's Annual Fee 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 in the past. Be sure to check anything that is already populated for accuracy and make any changes as needed.

To begin updating the information to include in your Pennsylvania Attorney's Annual Fee form, perform the following steps:

1. **On the Attorney Annual Registration screen, click START next to your name in the grid.** If you previously opened your Attorney Annual Registration Fee Form or updated the Registration Responsibilities and Certification & Agreement checkboxes in the grid, the link will be labeled EDIT instead. After clicking the link, the Pennsylvania Attorney's Annual Fee Form page displays.
2. **If you haven't already, read the Registration Responsibilities.** You can access them by clicking the Registration Responsibilities link at the top of the form screen. After reviewing the responsibilities, close the document window or tab.
3. **Select the checkbox acknowledging that you have read the Registration Responsibilities notice.** The checkbox will already be selected if you acknowledged the notice in the grid on the previous page as described under [Registration Responsibilities and Certification and Agreement](#) on page 10. You will not be able to submit your form or payment without acknowledging that you have read the notice.
4. **Under the Attorney Information section, update any information necessary:**
 - a. Verify your Name. The name on record with the Disciplinary Board is displayed. If your 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 Name Change Form.. Follow the instructions on the form to request the change.
 - b. Verify your attorney Status for the upcoming year. The 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, contact the Disciplinary Board using the information in the Contact Us section near the top of the page. The Total Fee for the selected Status is displayed automatically based on the selected Status.
 - c. 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.
5. **Complete the Demographic Information section.** This information is only provided to the Disciplinary Board in aggregate form; it is not linked directly to your

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- information. The information is used to increase diversity in the Bar, but you can choose to not provide an answer to the questions.
- a. Select your Race/Ethnicity from the dropdown or select 'Prefer Not To Answer'. For more information on the values provided, click the Learn More icon to the right of the field.
 - b. Select your Gender from the dropdown or select 'Prefer Not To Answer'.
6. **Complete the Succession Planning section.** This information is used to describe the status of plans in the event of death or disability.
- 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.
7. The Contact Information section displays details based on your registration from the previous year. This section is used to update your addresses, phone and fax telephone numbers, e-mail addresses, and current employer. **Verify and, if necessary, update your contact information:**
- a. The section displays three addresses for Pennsylvania attorneys; one for each address that must be provided: a Mailing Address, Office Address, and Residence Address. Only two addresses, Office Address and Residence Address, are required for Defender or Legal Services attorneys, In-House Corporate Counsel, or Foreign Legal Consultants. However, In-House Corporate Counsel and Defender or Legal Services attorneys cannot update their Office Address as part of their attorney registration and the fields are disabled.
 - b. For Pennsylvania attorneys, verify the Mailing Address displayed. To use an address other than the one displayed, click Clear above these fields and enter the address information in the Location, Address, City, State/Territory, Zip/Postal Code, and PA County fields.
 - c. Verify the Office Address displayed. To use an address other than the one displayed, click Clear above these fields and enter the address information in the Location, Address, City, State/Territory, Zip/Postal Code, and PA County fields. In-House Corporate Counsel and Defender or Legal Services attorneys cannot update this address.
 - d. Verify the Residence Address displayed. To use an address other than the one displayed, click Clear above these fields and enter the address information in the Location, Address, City, State/Territory, Zip/Postal Code, and PA County fields.
 - e. Select the address that can be used for Public Access Use by selecting the checkbox below the appropriate address. For Pennsylvania attorneys, 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 for Public Access Use. Defender or

- Legal Services attorneys, Foreign Legal Consultants, and In-House Corporate Counsel must use the Office Address for Public Access Use and this cannot be changed.
- f. Verify and, if necessary, update your Primary Telephone number.
 - g. Verify and, if necessary, update your Secondary Telephone number. You are not required to provide a secondary telephone number.
 - h. Verify and, if necessary, your Fax number. You are not required to provide a fax number.
 - i. Verify and, if necessary, update your Primary E-Mail Address.
 - j. Verify and, if necessary, update your Secondary E-mail Address. You are not required to provide a secondary e-mail address.
 - k. After reviewing and, if needed, updating any addresses, click the 'I have reviewed my contact information above and verify its accuracy' checkbox which appears below the addresses.
8. **Verify and, if needed, update your Primary Employer.** The value defaults to what you recorded on your application the previous year.
- 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.
9. **Under the Jurisdictions Where You Have Been Licensed To Practice Law (Except The Commonwealth of PA) 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 Remove link in that row of the grid.
 - c. To add a jurisdiction, click the Add link.
 - d. Begin entering the name of the jurisdiction in the Court/Jurisdiction field of the grid. The field displays matching jurisdictions as you type. Click on your jurisdiction when it is displayed in the list.
 - e. Select your Current Status in that court or jurisdiction from the dropdown.
 - f. Continue adding jurisdictions until they are all displayed in the grid.
10. 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. Defender or Legal Services attorneys, Foreign Legal Consultants, and In-House Corporate Counsel will not have this section on their form page. If needed, a brief description is available by clicking on the Question Mark icon to the right of the Account Type header in the grid. **Verify and if necessary, update the financial institutions that will be used for the current year:**
- a. If you will not hold IOLTA or IOLTA Exempt or Interest for Clients funds, select the 'I do not have IOLOTA or IOLTA Exempt accounts required to be reported' checkbox.

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- b. 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 be reported' checkbox.
 - c. If the grid under IOLTA or IOLTA Exempt or the Interest for Clients displays any financial institutions that will not be used in the current period, select the checkboxes for each on the far left of the grid and click DELETE SELECTED, or click SELECT ALL then DELETE SELECTED if you need to remove all institutions listed in the grid.
 - d. To add a new financial institution, click the Add link in the grid for the appropriate type of funds (IOLTA/IOLTA Exempt in the first grid or Interest for Clients, Other Authorized Investments, or Business/Operating in the second grid).
 - e. Select the Eligible Institution Type from the dropdown.
 - f. Select the Bank/Brokerage Name from the dropdown for IOLTA/IOLTA Exempt funds grid. For Interest for Clients or other investments, begin entering the name of bank or brokerage; the dropdown field displays matching banks or brokerages as you type. Click on your bank or brokerage when it is displayed.
 - g. Enter the Account Number for the bank or brokerage company.
 - h. Indicate if the account holds P.A.R.P.C. 1.15 funds by selecting 'Yes' or 'No' from the dropdown.
 - i. Select the Bank Location (State).
 - j. Select the Account Type from the dropdown.
 - k. Continue adding financial institutions until they are all displayed in the appropriate grids.
11. **In the Professional Liability Insurance section, indicate your professional liability status.** Read the three available choices and select the radio button which indicates your status. Defender or Legal Services attorneys, Foreign Legal Consultants, and In-House Corporate Counsel will not have this section on their form page.
12. **In the Certification and Agreement section, indicate you have read the statement by selecting the checkbox.** 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 10. You will not be able to submit your form or payment without acknowledging that you have read the statement.
13. **In the Opportunities to Provide Pro Bono Service 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.

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 Pennsylvania Attorney's Annual Fee Form page. You are returned to the Registrations To Complete page, and your registration Status displays as Not Submitted.

If the browser is idle for more than 20 minutes, your progress will be saved automatically and you will be logged out of your UJS Web Portal account.

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 Annual Registration → Registrations To Complete.** The Attorney Annual Registration page displays.
3. **Click the EDIT link next to your name in the grid.** The Pennsylvania Attorney's Annual Fee 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 Pennsylvania Attorney's Annual Fee Form Page

If you complete the process of updating your form on the Pennsylvania Attorney's Annual Fee 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 Registration Responsibilities notice and Certification and Agreement statement, 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 30.

Submitting your Form from the Registrations To Complete Page

If you saved your progress after updating all the information on the Pennsylvania Attorney's Annual Fee 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 Registrations To Complete page.

Section 3: Self-Registering Attorneys

From the Registrations To Complete page, click SUBMIT REGISTRATION below the grid.

If any required information is missing, a message displays on the screen indicating that the form is incomplete. You must access the Pennsylvania Attorney's Annual Fee Form page and complete it before you can submit the registration. For more information, see *Updating your Pennsylvania Attorney's Annual Fee Form* on page 11.

Otherwise, the 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 30.

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, it is recommended that you ensure the user that you will designate as your proxy has already created an account on the UJS Web Portal. For more information, see [Proxy Users - Creating an Account](#) on page 3.

This section includes:

[Searching for your Proxy](#) (pg. 17)

[Adding your Proxy](#) (pg. 19)

[Removing Proxies](#) (pg. 19)

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 Annual Registration → Manage Proxies.** The proxy management page displays.
3. **Under the Who Can Act On My Behalf section, click ADD PROXY USERS.** 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. **On the User Search page, select the Search Type of Name from the dropdown.** 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. It may be necessary to contact your proxy for the exact spelling.
5. **Select the State of your proxy's address.**

Section 4: Attorneys Using a Proxy to Register

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. **On the User Search page, 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 below the SEARCH and CANCEL buttons.

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 17.

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 17.

Adding your Proxy

If your proxy is displayed in the grid, select the checkbox in the grid next to their name and click ADD SELECTED USERS. You are returned to the Manage My Account page and your proxy is now displayed in the Who Can Act On My Behalf section.

Removing Proxies

If you will no longer need a particular proxy for future registrations, you can remove them from the proxy management page. Under the Who Can Act on My Behalf section, click the Remove link next to the proxy that you will no longer need. 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 17.

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 3.

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 17.

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. 20)

[Updating Registration Forms for Attorneys](#) (pg. 22)

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

[Updating Information for PA Attorneys in Batch](#) (pg. 26)

[Submitting Registration Forms for all Attorneys](#) (pg. 28)

[Removing Attorneys from your UJS Web Portal Account](#) (pg. 28)

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 Annual Registration → Registrations To Complete. The Attorney Annual Registration page displays.

When the Attorney Annual Registration screen displays, 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.

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 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 in order to find all forms in progress.

To filter the attorneys displayed in the grid, click FILTER. The Filter By screen opens. You can filter by Registration Type, Status, PA Bar Number, Date of Birth, Primary County, City, and State. Select or enter at least one criteria to filter by and click APPLY.

To clear the filter and view all of your attorneys again, click FILTER and remove any criteria by selecting the blank line for any dropdown that is displaying a value and deleting the date of birth, if used. Click APPLY to 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 Registrations To Complete page.

Registration Responsibilities and Certification and Agreement

These two links above the grid on the Registrations to Complete page provide you with the ability to view the Registration Responsibilities notice and the Certification and Agreement statement.

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 grid under the Registration Responsibilities and Certification & Agreement columns. Alternatively, you can use the Select All links at the bottom of each column to select the checkboxes for all of the attorneys displayed in the grid at once. Click SAVE RESP. AND CERT. SELECTIONS to save the acknowledgements in the grid.

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 10 in order to perform this function themselves and save the form as described in [Saving your Progress](#) on page 14. 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, checkboxes will appear in the grid in the Registration Responsibilities and Certification & Agreements columns when you view the Attorney Annual Registration 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's Annual Fee 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 for each attorney in the past. 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 institution and professional liability insurance information in batch. For more information, see [Updating Information for PA Attorneys in Batch](#) on page 26. 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 screen, click Start next to one of the attorneys in the grid.** If you or the attorney previously opened the Attorney Annual Registration Fee Form or updated the Registration Responsibilities and Certification & Agreement checkboxes in the grid, the link will be labeled EDIT instead. After clicking the link, the Pennsylvania Attorney's Annual Fee Form page displays.
2. **If you haven't already, read the Registration Responsibilities notice by clicking on the link at the top of the page.** You can access the Registration Responsibilities by clicking the link at the top of the form screen. After reviewing the responsibilities, close the document window or tab.
3. **Select the checkbox acknowledging that the Registration Responsibilities notice has been read.** The checkbox will already be selected if the notice was previously acknowledged according to the steps under [Registration Responsibilities and Certification and Agreement](#) on page 21. You will not be able to submit the form or payment for your attorney without acknowledging the notice.
4. **Under the Attorney Status and Payment section, update any information necessary for the attorney:**
 - a. Verify the attorney's Name. 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.
 - b. Verify the attorney's Status for the upcoming year. The 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, contact the Disciplinary Board using the information in the Contact Us section near the top of the page. The Total Fee for the selected Status is displayed automatically based on the selected Status.

- c. 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.
5. **Complete the Demographic Information section.** This information is only provided to the Disciplinary Board in aggregate form; it is not linked directly to your information. The information is used to increase diversity in the Bar, but you can choose to not provide an answer to the questions.
 - a. Select the Race/Ethnicity of the attorney from the dropdown or select 'Prefer Not To Answer'. For more information on the values provided, click the Learn More icon to the right of the field.
 - b. Select the Gender of the attorney from the dropdown or select 'Prefer Not To Answer'.
6. **Complete the Succession Planning section.** This information is used to describe the status of plans in the event of death or disability.
 - 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.
7. The Contact Information section displays details for the attorney based on their registration from the previous year. This section is used to update their addresses, phone and fax telephone numbers, e-mail addresses, and current employer. **Verify and, if necessary, update their contact information:**
 - a. The section displays three addresses for Pennsylvania attorneys; one for each address that must be provided: a Mailing Address, Office Address, and Residence Address. Only two addresses, Office Address and Residence Address, are required for Defender or Legal Services attorneys, In-House Corporate Counsel, or Foreign Legal Consultants. However, In-House Corporate Counsel and Defender or Legal Services attorneys cannot have their Office Address updated as part of their attorney registration and the fields are disabled.
 - b. For Pennsylvania attorneys, verify the Mailing Address displayed. To use an address other than the one displayed, click Clear above these fields and enter the address information in the Location, Address, City, State/Territory, Zip/Postal Code, and PA County fields.
 - c. Verify the Office Address displayed. To use an address other than the one displayed, click Clear above these fields and enter the address information in the Location, Address, City, State/Territory, Zip/Postal Code, and PA County fields. These fields cannot be updated for In-House Corporate Counsel and Defender or Legal Services attorneys.
 - d. Verify the Residence Address displayed. To use an address other than the one displayed, click Clear above these fields and enter the address information in

Section 5: Proxies Completing Registrations

- the Location, Address, City, State/Territory, Zip/Postal Code, and PA County fields.
- e. Select the address that can be used for Public Access Use by selecting the checkbox below the appropriate address. For Pennsylvania attorneys, 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 for Public Access Use. Defender or Legal Services attorneys, Foreign Legal Consultants, and In-House Corporate Counsel must use the Office Address for Public Access Use and this cannot be changed.
 - f. Verify and, if necessary, update the attorney's Primary Telephone number.
 - g. Verify and, if necessary, update the attorney's Secondary Telephone number. You are not required to provide a secondary telephone number.
 - h. Verify and, if necessary, update the attorney's Fax number. You are not required to provide a fax number.
 - i. Verify and, if necessary, update the attorney's Primary E-Mail Address.
 - j. Verify and, if necessary, update the attorney's Secondary E-mail Address. You are not required to provide a secondary e-mail address.
 - k. After reviewing and, if needed, updating any addresses, click the 'I have reviewed my contact information above and verify its accuracy' checkbox which appears below the addresses.
8. **Verify and, if needed, update the attorney's Primary Employer.** The value defaults to what was recorded on their application the previous year.
- 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.
9. **Under the Jurisdictions Where You Have Been Licensed To Practice Law (Except The Commonwealth Of PA) 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 Remove link in that row of the grid.
 - c. To add a jurisdiction, click the Add link.
 - d. Begin entering the name of the jurisdiction in the Court/Jurisdiction field of the grid. The field displays matching jurisdictions as you type. Click on the jurisdiction when it is displayed in the list.
 - e. Select their Current Status in that court or jurisdiction from the dropdown.
 - f. Continue adding jurisdictions until they are all displayed in the grid.
10. The Financial Data 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. Defender or Legal Services Attorneys, Foreign Legal

- Consultants, and In-House Corporate Counsel will not have this section on their form page. If needed, a brief description is available by clicking on the Question Mark icon to the right of the Account Type header in the grid. **Verify and if necessary, update the financial institutions that will be used for the current year:**
- a. If the attorney will not hold IOLTA or IOLTA Exempt or Interest for Clients funds, select the 'I do not have IOLOTA or IOLTA Exempt accounts required to be reported' checkbox.
 - b. 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 be reported' checkbox.
 - c. If the grid under IOLTA or IOLTA Exempt or the Interest for Clients displays any financial institutions that will not be used by your attorney or firm in the current period, select the checkboxes for each on the far left of the grid and click DELETE SELECTED, or click SELECT ALL then DELETE SELECTED if you need to remove all institutions listed in the grid.
 - d. To add a new financial institution, click the Add link in the grid for the appropriate type of funds (IOLTA/IOLTA Exempt in the first grid or Interest for Clients, Other Authorized Investments, or Business/Operating in the second grid).
 - e. Select the Eligible Institution Type from the dropdown.
 - f. Select the Bank/Brokerage Name from the dropdown for IOLTA/IOLTA Exempt funds grid. For Interest for Clients or other investments, begin entering the name of bank or brokerage. The dropdown field displays matching banks or brokerages as you type. Click on the bank or brokerage when it is displayed.
 - g. Enter the Account Number for the bank or brokerage company.
 - h. Indicate if the account holds P.A.R.P.C. 1.15 funds by selecting Yes or No from the dropdown.
 - i. Select the Bank Location (State).
 - j. Select the Account Type from the dropdown.
 - k. Continue adding financial institutions for your attorney until they are all displayed in the appropriate grids.
11. 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 26. **If not, read the three 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.
12. **In the Certification and Agreement section, acknowledge the statement by selecting the checkbox.** The checkbox will already be selected if this was previously acknowledged according to the steps under [Registration Responsibilities and Certification and Agreement](#) on page 21. You will not be able to submit the form or payment for your attorney without acknowledging the statement.

Section 5: Proxies Completing Registrations

13. **In the Opportunities to Provide Pro Bono Service 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.
14. **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 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 30 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 Pennsylvania Attorney's Annual Fee Form page. You are returned to the Registrations To Complete page, and your attorney's registration Status displays as Not Submitted.

If the browser is idle for more than 20 minutes, your progress will be saved automatically and you will be logged out of your UJS Web Portal account.

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 Annual Registration → Registrations To Complete.** The Attorney Annual Registration page displays.
3. **Click the EDIT link next to the name in the grid for the attorney which you previously started.** Their Pennsylvania Attorney's Annual Fee 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 institution and professional liability insurance information for all of the attorneys in batch. This saves time and potential data entry errors.

To update financial institution and professional liability insurance information for attorneys in batch, perform the following steps:

1. **Navigate to My Services → Attorney Annual Registration → Batch Update.**
2. 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, brief description is available by clicking on the Question Mark icon to the right of the Account Type header in the grid. **Verify and if necessary, update the financial institutions that will be used for the current year:**
 - a. If the attorney will not hold IOLTA or IOLTA Exempt or Interest for Clients funds, select the 'I do not have IOLOTA or IOLTA Exempt accounts required to be reported' checkbox.
 - b. 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 be reported' checkbox.
 - c. If the grid under IOLTA or IOLTA Exempt or the Interest for Clients displays any financial institutions that will not be used by your attorneys or firm in the current period, select the checkboxes for each on the far left of the grid and click DELETE SELECTED, or click SELECT ALL then DELETE SELECTED if you need to remove all institutions listed in the grid.
 - d. To add a new financial institution, click the Add link in the grid for the appropriate type of funds (IOLTA/IOLTA Exempt in the first grid or Interest for Clients, Other Authorized Investments, or Business/Operating in the second grid).
 - e. Select the Eligible Institution Type from the dropdown.
 - f. Select the Bank/Brokerage Name from the dropdown for IOLTA/IOLTA Exempt funds grid. For Interest for Clients or other investments, begin entering the name of bank or brokerage. The dropdown field displays matching banks or brokerages as you type. Click on the bank or brokerage when it is displayed.
 - g. Enter the Account Number for the bank or brokerage company.
 - h. Indicate if the account holds P.A.R.P.C. 1.15 funds by selecting Yes or No from the dropdown.
 - i. Select the Bank Location (State).
 - j. Select the Account Type from the dropdown.
 - k. Continue adding financial institutions for your attorneys until they are all displayed in the appropriate grids.
3. **Use the Professional Liability Insurance section to indicate the status for the attorneys.** Read the three available choices and select the radio button which indicates the appropriate status for the attorneys.
4. **In the Registrations to Update section, all of the attorneys for which you are a proxy are displayed in the grid.** Select the attorneys for which the options you made in the steps above apply. If the selections apply for all attorneys, you can click the Select All link below the grid.
5. **Click SAVE.**

Section 5: Proxies Completing Registrations

6. **A confirmation displays asking if you are sure you wish to replace the bank accounts and liability status for the selected attorneys.** If you are sure, click OK to continue. You are returned to the Registrations To Complete page.
7. **If the information entered did not apply to all attorneys in the grid, repeat these steps, changing the information and selecting the attorneys in the grid for which the new information applies before saving.** For example if some attorneys for which you proxy should have different selections for their professional liability insurance, you can add one option for some of the attorneys in the grid, then return and select another option for the remaining attorneys in the grid.

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 in order to avoid paying more than one convenience fee.

You can submit the registration forms for all attorneys at the same time from the 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 21.

Next, select the checkbox in the grid to the left of each attorney's name that is ready to be submitted. Alternatively, you can use the Select All link below the grid to select all the attorneys in the grid at one time. Click SUBMIT SELECTED REGISTRATIONS below the grid.

If any required information is missing for one or more attorneys, a message displays next to the affected attorney in the grid indicating the forms that are incomplete. You must access the Pennsylvania Attorney's Annual Fee 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 22.

Otherwise, the registration forms are sent to the 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 30.

Removing Attorneys 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. To remove attorneys, perform the following steps:

1. **Ensure that you are logged into your UJS Web Portal Account.**
2. **Navigate to My Services → Attorney Annual Registration → Manage Proxies.** The proxy management page displays.
3. **In the Users I Can Proxy For section, click the Remove link for any attorneys displayed for which you will no longer be a proxy.** If they are not displayed in the grid, then the attorney may already have removed you as their proxy from their UJS Web Portal Account.

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. 30)

[Paying Online](#) (pg 30)

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 (July 1st). Click CONFIRM 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 34. 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 all the information for each attorney is completed before continuing. For information on completing registrations for attorneys for which you proxy, see [Section 5: Proxies Completing Registrations](#) on page 20.

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.**

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 Shopping Cart, click PAY ONLINE.** You will be taken to the US Bank E-Payment Services page.

2. **The US Bank E-Payment Service page displays the total amount due. Review the information and click CONTINUE.**
3. **In the Account Information section, select whether you will be using an ATM card or a credit/debit card for payment:**
 - a. If using an ATM card:
 - i. Ensure the Use ATM Card radio button is selected.
 - ii. Enter the card number in the ATM Card Number field. Do not enter any spaces between numbers even if displayed on your card.
 - OR
 - b. If using a Credit/Debit card:
 - i. Select Credit/Debit Card Type. Visa, Master Card, Discover and American Express cards and debit cards with Visa or Master Card logos are accepted for payment.
 - ii. Enter the Credit/Debit Card Number. Do not enter any spaces between numbers even if displayed on your card.
 - iii. Enter the Expiration Date. Select the month in the first dropdown box and the year in the second.
 - iv. If using a debit card with a Visa or Master Card logo, you can choose to use the card as an ATM card when processing the payment. To process the card as an ATM card, select the "Process this credit card as an ATM debit card if eligible" checkbox. Clear the checkbox to process an ATM card as a credit card.
4. **In the Billing Address section, enter the address where the statement for the ATM card or credit/debit card is received.** Payments may not be processed in a timely manner or may be declined if the address entered does not match the billing address listed with your bank or credit card company. Use the following guidelines to enter the address:
 - a. 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.
 - b. For the City/Town, enter the full name of the city or town. Do not use any abbreviations.
 - c. For the State/Province/Region, enter a postal standard state abbreviation for addresses in the United States (example, PA). For foreign billing addresses, enter the name of your Province or Region.
 - d. For the Zip/Postal Code, enter a valid US postal zip code. For foreign billing addresses, enter a valid postal code for your country.
 - e. For the country, enter "US" for domestic addresses. Otherwise, for foreign billing addresses enter the full name of your country.
5. **Click CONTINUE.**
6. **In the Contact Information section, enter your name, phone number, and e-mail address.** This information is necessary in order to contact you if there is any question about a payment.
7. **If your billing address is the same as your mailing address, ensure the "Use my Billing Address" radio button is selected.** Otherwise, select the "Use the address

Section 6: Making Payments

- entered below” radio button and enter your current mailing address according to the following guidelines:
- a. 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.
 - b. For the City/Town, enter the full name of the city or town. Do not use any abbreviations.
 - c. For the State/Province/Region, enter a postal standard state abbreviation for addresses in the United States (example, PA). For foreign billing addresses, enter the name of your Province or Region.
 - d. For the Zip/Postal Code, enter a valid US postal zip code. For foreign billing addresses, enter a valid postal code for your country.
 - e. For the country, enter “US” for domestic addresses. Otherwise, for foreign billing addresses enter the full name of your country.
8. **Click CONTINUE.**
 9. **Verify the payment details displayed, the payment amount, payment account details and billing address. A \$2.75 convenience fee is added to your total payment amount.** Confirm the e-mail address where the confirmation will be sent once the payment is processed. If paying with a credit card, enter the three digit code found on the back of your credit card.
 10. **If you made another payment on the same card within the last 14 days, you will be prompted to confirm that you wish to make an additional payment.** If so, select the checkbox for “Please note: A similar payment was initiated within the last 14 calendar days...” If you wish to make the payment on a different card, click CANCEL twice to return to the payment information page and enter different information. If you do not wish to continue making a payment, close the browser to cancel the transaction and clear the shopping cart. Otherwise, continue with the remaining steps.
 11. **Click CONFIRM to continue making the payment on the card.**
 12. **Your payment information will now be transmitted to your bank or credit card company.** Do not click the Back button in your browser or close the browser during this process. When completed, you will receive notification that the transaction was accepted or declined:
 - a. If the ATM or credit/debit card was declined, you will be returned to the payment verification page. Click MAKE CHANGES to return to the payment information page where you can enter different card information. You can also close the browser to cancel making a payment at this time and clear the shopping cart.
 - b. If the ATM or credit/debit card is accepted, you will be taken to the confirmation page.
 - c. Printing a copy of the confirmation page is recommended. To print the confirmation, click CONTINUE. You are returned to the Attorney Annual Registration system. Your confirmation number is displayed below the transaction details. You can print the page by using the print function of your browser.

- d. To view the attorney's Annual Fee Form, click the View Form link. The completed form opens in Adobe Reader. If you choose to, print the form your records. When finished, close Adobe Reader.

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 Shopping Cart, click PAY BY MAIL.**
2. **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 online payment option in the shopping cart instead.
3. The printable voucher is generated and opens in Adobe Reader. **Using the tools in Adobe Reader, print the voucher.** If you are unable to print, you can also save the voucher until you are ready to print it. When finished printing or saving the voucher, close the window or tab.
4. A summary of your attorney registration information displays in a grid. Below the grid, you can use the VIEW/PRINT VOUCHER button if you need to view or print the voucher again another time. **When finished, click CLOSE.**
5. **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.
6. **Write the voucher number on the check for easy reference.** The voucher number is printed on the voucher on the right-side margin near the top of the form.
7. **Write the amount being paid in the Fee Paid area at the bottom of the first page of the voucher.**
8. The second page of the printed forms is the Registration Summary. **The Registration Summary page should be filed with your records.** It should not be mailed with the voucher and check.
9. Mail the voucher and the check to the following:
Attorney Registration Office
PO Box 3313
Lancaster, PA 17604-3313
10. 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 34.

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 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 Print Form link. The Annual Fee Form opens in Adobe Reader. If you choose to, print the form for your records.

To view a summary of the payment or the voucher, click Print Receipt. 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 you can click VIEW/PRINT VOUCHER to open it. The voucher opens in Adobe Reader. If needed, print the form. When finished, close Adobe Reader.

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 Print Receipt link, 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 Annual Fee Form by clicking on the Print Form link for each attorney. To view the receipt, you can click the Print Receipt link for any attorney.

Donating to IOLTA

If you would like to make a donation to IOLTA, you can navigate to their website any time you are logged into the UJS Web Portal by navigating to My Services → Attorney Annual Registration → Donate to IOLTA.

You can also click the Donate To IOLTA link at the bottom of any Annual Attorney Registration page that opens after you complete your payment.

Help and Support

Additional assistance with the UJS Web Portal, the USBank 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 WATCH NOW under the topic 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's Annual Fee Form Assistance

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