

IOLTA COMPLIANCE CERTIFICATE and PRO BONO REPORTING
Frequently Asked Questions about Online Reporting

Should all attorneys complete a IOLTA Compliance Certificate? *Yes. You should complete the IOLTA Compliance Certificate providing IOLTA information or indicate on the Certificate click the response which indicates someone is providing the information on your behalf.*

Should I duplicate IOLTA information provided by someone else? *All attorneys should complete and sign the form, but only one representative from each firm should provide the actual IOLTA account information. The form will direct you in this manner.*

How do I go directly to the IOLTA Compliance Certificate? *You are offered the Pro Bono Reporting Form first. When you press “Submit” at the end of the question series, you will be automatically directed to the IOLTA Compliance Certificate.*

Should I complete the Pro Bono Reporting Form if I did not or cannot provide pro bono services? *Yes. We would like all attorneys who are licensed, practice or work in Montana to complete the Pro Bono Reporting Form individually. Advance through the form to find the response that is appropriate for your circumstances, including why you did not or cannot provide pro bono services.*

What if someone else is providing IOLTA information on my behalf? *Complete the Pro Bono Reporting Form individually (or designate someone in our office to do so for you). When you are redirected to the IOLTA Compliance Certificate, you will be given the opportunity to report if someone else is providing IOLTA information on your behalf. Answer accordingly and sign the Compliance Certificate as instructed.*

How do I enter my information into the spaces provided? *Use your “tab” key to move from entry to entry. You can also rest your cursor on the desired location.*

Do I have to provide an answer for every question? *No. It is only necessary to provide information that is applicable to your situation. Some questions require a response. Those questions are marked with an “*”. Make sure you read the questions carefully to make certain you answer those that apply to you. If you get a red error message and you cannot submit the form, it is likely you didn’t provide an answer to a required question or the answer is in the wrong format (e.g. hours as 10.00 instead of 10).*

How do I change my answers when I am still in the online forms? *You can change your answers while you are still in a form by simply typing over your previous answer. You can go back and forth between pages by pressing “previous” and “next” at the bottom of each page.*

Can I leave the online forms and return at a later date? *You can press “exit” in the upper right hand corner at any time when completing the Pro Bono Reporting Form or the IOLTA Compliance Certificate. When you return to the form (from any source that has the link), from the same computer where you started to complete the form, you will be returned to your form where you left off. **Remember: Your Reporting Form and IOLTA Compliance Certificate are not submitted until you press “Submit” at the end of each form.***

How do I change my answers after I have pressed “Submit” and exited the forms?

You cannot automatically change your answers electronically after you submit your form. You must contact Kathy Lynch at the State Bar of Montana (442-7660 or klynch@montanabar.org) for instructions in changing a final submission.

How come I can't advance to the next page by pressing “next” at the bottom of the page?

Some responses are required fields (marked with an “”). You must provide an answer in these fields or you will not be permitted to advance in the form. Generally, it will bring you back to the question that requires an answer or additional information. Make sure your answers are in the format requested (whole numbers for example).*

How come I have to use the same computer to complete the form? *The program remembers your previous entries. If you use a different computer to revise or finish your forms, the information previously entered will not be saved.*

How come I can't enter more than one set of forms (Pro Bono Reporting and IOLTA Compliance Certificate) on a single computer? *Allowing a single entry from each computer preserves the integrity of data by limiting entries from outside sources and identifying any problems. If you try to remove the prior information and enter new information for another, it changes the first form and your Report and Compliance Certificate will not be saved. If a form has already had a final submission, it will not allow you to return to the form (but delivers you to the Confirmation page).*

When I try to print, my selections don't appear on the printed form? *This is a problem related to how your Internet Browser printing features are set up. You have to have “background” printing selected. This is not unique to your IOLTA and Pro Bono Reporting forms. It applies to anything you print from your Browser that has these graphics. Below are instructions on how to make sure your Browser's settings are correct:*

Internet Explorer:

- Click on "Tools"
- Click on the "Advanced" Tab
- Scroll down to "Printing"
- Make sure Print Background Colors and Images is checked
- Apply and click on “Okay” to save your settings

Modzilla Firefox:

- Click on "File" on your Web Browser Toolbar
- Click on "Page Setup"
- Make sure the box that says "Print Background Colors" is checked

FireFox on Mac:

- Click on the File prompt on the Web Browser Toolbar
- Select "Print"
- Make sure that Firefox is selected in the Presets dropdown menu choice
- Under "Appearance" Options, make sure a check mark is ticked for "Print Background Colors"

Once you are sure you are set up TO PRINT:

Remember, you will not be able to print after you click on "Submit".

Who do I contact if I have questions or comments?

*IOLTA Reporting: Kathy Lynch, State Bar of Montana, 406/442-7660 or
klynch@montanabar.org*

*Pro Bono Reporting: Patty Fain, Montana Supreme Court, 406/794-7824 or
pfain@mt.gov*