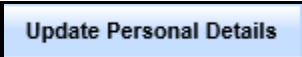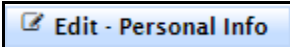## UPDATE PERSONAL DETAILS TAB
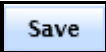
Compliance Item: TAX ID (TIN) Reporting

TIN Reporting can be completed a few different ways: 1. Updated under the Update Personal Details tab, 2. Completed as part of the online payment process or 3. Reported on the printed Invoice and mailed into the Client Protection Fun with the CPF Assessment Payment.

Compliance Item	Status	Detail
CPF	✔	Payments Current.
TIN	✖	Reporting Due. Click 'Update Personal Details' tab, then click 'Edit Personal Info' button to report.
Pro Bono	✖	Reporting Due. Click 'File Pro Bono Report' tab to file your report.
IOLTA	✖	Reporting Due. Click 'File IOLTA Report' tab to file your report.

1. Click **Update Personal Details** tab.

2. Select the **✎ Edit - Personal Info** button.

Edit Personal Information

Employer:

SSN:

DOB:

Federal Tax ID Reporting
- Tax ID status is unknown
- ● No, I do not have a Tax ID
- Yes, I have a Tax ID as given below

TIN: _____ Format: XXXXXXXXX or XX-XXXXXXX

Last Reported: 08/30/2017 07:58:51 AM
☐ The above Federal Tax ID Information was provided to CPF by Attorney

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Save | Cancel

3. Enter the information within the dialog box and be sure to place a check mark in the Last Reported Confirmation box or it will not register:

Last Reported: 04/06/2021 04:03:34 PM
☑ I confirm that the above Federal Tax ID information is accurate
.

4. Click **Save**.
   a. Compliance for TIN Reporting is now Current on the Compliance Summary.

TIN	✔	Reporting Current.

END OF DOCUMENT