

LEGAL SERVICES PROJECTS AND SUPPORT CENTERS

Electronic EAF Budget Forms Instructions

Read the following instructions carefully before you begin to fill out the EAF budget forms. Refer to the “INSTRUCTIONS” for definitions and explanations of specific questions or line items. If you have questions, contact the Trust Fund Office.

1. **SAVE A COPY OF THESE FORMS:** You will want a clean copy in case you need to start over or need to make extra copies for multi-county programs. If you are using Word 2007 or a later version, click the Office button at the top left corner of the screen (a gold circle with colored squares in it); if you are using a previous version of Word, click the “File” menu. Then choose “Save As” and save a copy of these forms to your computer. Data entered directly into the forms will only be saved if you have already saved the form to your computer.
2. **TO USE THE FORMS:**
 - a. **WORD forms – A, D and E (E is for LSPs only):**
 - The document is protected so that you will only be able to place your cursor in the gray boxes. Use the tab key, arrow keys, or the mouse to move between boxes. The boxes will expand to allow unlimited information to be entered.
 - **Save often!**
 - b. **EXCEL forms – B and C:**
 - **Finding the forms:** Each form is a separate worksheet within the Excel spreadsheet. Move from form to form by clicking on the corresponding tab at the bottom of the screen. (The tabs resemble file folder tabs.)
 - **Entering data:** You can input information into the non-shaded cells only. Use the mouse, arrow keys or tab key to place the cursor in the cell in which you will enter data. (All the BLUE cells are “protected” and you cannot input any information into them. Many of the BLUE cells have built-in formulas and will automatically calculate the totals.)
 - **Editing:** To make corrections, place your cursor in the cell containing the data to be corrected and double-click or press F2 to access "editing" mode.
 - **Save often!**
 - c. **Special information for multi-county programs:**
 - **Create a separate Form C for each county you serve:** Right-click on the “Form C” “tab” at the lower left-hand corner of the screen. Choose “Move or Copy”, choose “Move to End”, and then click the “Create a Copy” option. This will create a new worksheet named “Form C(2)”; replace the default worksheet name with the name of the county for which data is being entered.
 - **Print a hard copy:** If you use the print icon, only the form that you are currently viewing will print. To print all the forms (worksheets) at once, click the "Office Button" (for Excel 2007 or later) or the “File” menu (for prior versions of Excel), then click "Print". In the “Print What?” section of the Print dialog box, choose “Entire Workbook”. If your printer does not print all the forms when you choose this option, print each form individually.
 - **Save often!**

If you need assistance using these forms, please contact the Trust Fund office at 415-538-2252 or trustfundprogram@calbar.ca.gov.