

IOLTA Eligibility Application - Electronic Forms Instructions

Materials are located at www.calbar.ca.gov/ioltaapplicationmaterials

The eligibility guidelines for legal services projects and support centers are posted at the web address above. Click on *Application Materials* in the left-hand navigation bar for the applicable instructions and forms.

Read the following instructions carefully before you begin to fill out the application forms.

1. **SAVE A COPY OF THE FORMS:** You will want a “clean” copy in case you need to start over or need to make extra copies for multi-county programs. From the *File* menu, choose *Save As* and save a copy of these forms to your computer. Data entered directly on the web pages containing the documents will not be saved to the website; they must be saved to your computer.
2. **REFER TO THE INSTRUCTIONS** for definitions and explanations of specific questions or line items. If you have further questions, contact the Legal Services Trust Fund Program.
3. **TO USE THE FORMS:**
 - a. **WORD forms:**
 - The Word forms consist of text, tables and form fields. To view the tables with or without gridlines, from the *Table* menu, choose *Show Gridlines* or *Hide Gridlines*, respectively. If you would like to see the spaces, tab marks, hard returns, and section break indicators, click on the ¶ symbol, on the *Home* toolbar.
 - The document is protected so that you will only be able to place your cursor in the gray boxes or click in the check boxes. Use the tab key, arrow keys, or your mouse to move between boxes. The boxes will expand to allow unlimited information to be entered for narrative answers.
 - Make an effort to eliminate extra space if the number of pages can be reduced.
 - **Save often!**
 - b. **EXCEL forms:**
 - **Finding the Forms:** Each form is a separate worksheet within the Excel workbook. Move from form to form by clicking on the corresponding tab at the bottom of the screen. (The tabs resemble file folder tabs.) Please do not create separate documents for each form.
 - **Enter 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 information into them. Many of the BLUE cells have built-in formulas and will automatically calculate the math for you.)
 - **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. Make the corrections, and then press the Enter key. To change the way your data appears, whether it is font, color, size, etc., go to the *Format* menu, select *Cells* and a dialogue box will appear with several tabs containing formatting options such as font, alignment, etc.

Over, please...

- **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 previous versions of Excel), then click *Print*. In the *Print What* section of the Print dialog box, choose *Entire Workbook*. (Note, some printers may not print all forms correctly when you choose this option, you may have to print each form individually.)

If a form prints with the far right column of the form appearing on a second page, from the *Page Layout* menu, under *Scale to Fit*, set the *Width* to 1 page. Try to print the form again, one worksheet at a time.

- **Save often!**

NOTE: Following is a list of the forms (worksheets) contained within the LSP and SC Excel documents. Please ensure that you complete and print each applicable form (worksheet). If you do not submit all applicable forms (worksheets), your application will be incomplete.

Legal Services Projects:

- VII. Annual Case Summary Report
- VII-A Report on Self-Help, Education & Outreach Activities
- VIII. Staffing and Volunteer Report for Legal Services Projects
- IX. Source of Funding Report
- X. Total Corporate Expenditures
 - ☐ Itemized Expenses
- XI. Qualified Expenditures
- XI-A. Additional Information About Expenditures
- XI-B. Expenditures by County

Support Centers:

- VII. Staffing & Volunteer Report for Support Centers
- VIII. Source of Funding Report
- IX. Total Corporate Expenditures
 - ☐ Itemized Expenses
- X. Expenditures for Support Services
- X-A. Additional Information About Expenditures
- XI. Annual Assistance Summary Report

4. SUBMITTING YOUR APPLICATION:

Print all of the forms (Word and Excel), attach the requested additional documentation, obtain the necessary original signatures, and **make one one-sided extra copy**. (The extra copy need not include the additional documents such as financial statements, job descriptions, etc.)

The original and one copy must be received in the Legal Services Trust Fund Office by **5:00 p.m. on Wednesday, February 1, 2012**. Applications sent by fax will not be accepted. Please also email the completed Word and Excel application files to trustfundprogram@calbar.ca.gov by the same date. An email of the forms will not be accepted in lieu of the original and extra copy.

If you need assistance downloading or copying these forms, please contact us at 415-538-2252 or trustfundprogram@calbar.ca.gov.