LEGAL SERVICES PROJECTS AND SUPPORT CENTERS
Electronic IOLTA Budget Forms Instructions

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

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. Click the Office button (for Excel 2007 or later) or the *File* menu (for previous versions of Excel), 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 web site; 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 Trust Fund office.

3. **TO USE THE FORMS:**

   a. **WORD forms – A, B, C, D, F & G (G is for LSPs only):**
      - 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.
      - **Save often!**

   b. **EXCEL form - E:**
      - **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.

      Special Information for Multi-County Programs (for LSPs only):
      - **Create a sheet for each county you serve and a sheet that summarizes the combined total:** Right-click on the *Form E* tab at the lower left-hand corner of the screen. Choose *Move or Copy*, click on *Move to End*, and then check the *Create a copy* box. This will create a new worksheet named *Form E(2)*; it may be helpful to rename each worksheet as the county to which it corresponds and the final worksheet as *Summary*.
      - **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 or the *File* menu, 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!**

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