

## 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. 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 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):**
    - Sections that require “fill-in-the-blank” answers have gray “boxes” and are “protected” – you won’t be able to put your cursor anywhere but the boxes or the “checkboxes” for “checkmark” answers. Use the tab or arrow keys or your mouse to move between boxes. Areas that require narrative answers are “unprotected” and you can type as much information as necessary. Use the “down arrow” key to move from the bottom of a narrative answer to the next answer space.
    - **Save often!**
  - b. **EXCEL form - E:**
    - **Enter Data:** You can input information into the non-shaded cells only. Use the mouse or arrow keys to place the cursor in the cell in which you will enter data. Press the “Enter” key. (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 math for you.)
    - **Editing:** To make corrections, place your cursor in the cell containing the data to be corrected and double-click to access “editing” mode. Make the corrections. 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”, choose “Move to End”, and then click the “Create a copy” option. 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” (for Excel 2007 or later) at the top-left corner of the screen (a gold circle with colored squares in it) 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 downloading or copying these forms, please contact us  
at 415-538-2252 or [trustfundprogram@calbar.ca.gov](mailto:trustfundprogram@calbar.ca.gov)**