



Welcome to the Pennsylvania IOLTA Board's new grants management system: paiolta.smartsimple.com. All grant applications for the IOLTA Specialized Legal Services (Zone) Grant will be submitted through this online system.

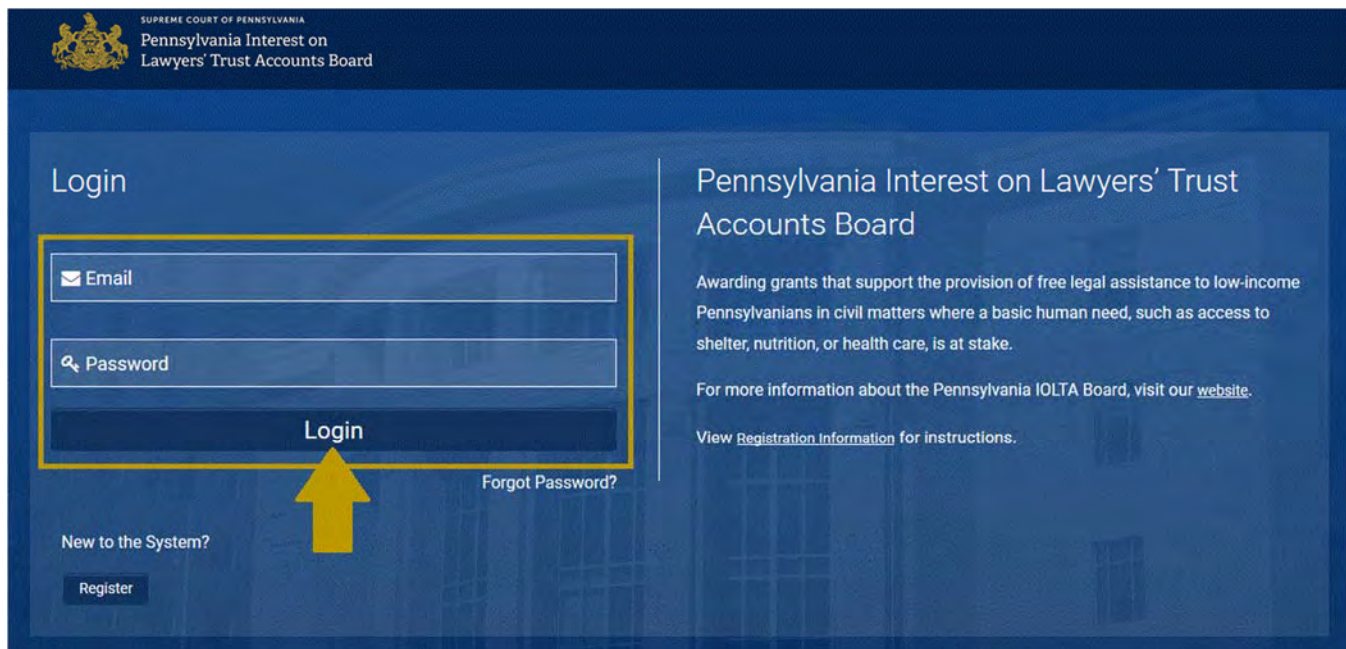
This guide provides instructions on how to start, save, and eventually submit an application. It also provides tips for using the system, so that the application process is as seamless as possible.

Before starting an application, please be aware that the Primary Contact is the first registered user to begin an application in the system and is the only user that has the ability to edit and submit the application once started. Additional organizational contacts will have read-only access to the organization's applications, but cannot edit and submit them.

Consequently, the Primary Contact must verify that they are authorized to submit the grant application on behalf of the organization. The Primary Contact will receive email notifications from the grants management system specific to their associated application and subsequent grant.

How to Complete an Application

Step 1: Go to the homepage, paiolta.smartsimple.com, type in your login details, and sign in:



Step 2: You will be brought to your grantee portal. Select “Apply Now” under “Funding Opportunities” to begin your application.



Funding Opportunities displays all currently available grant applications.

My Applications shares the list of all of your applications and their statuses.

Requires Attention will include any next steps such as your grant reports.



Funding Opportunities

Opportunity Details

IOLTA Specialized Legal Services (Zone) Grant

Apply Now ←

My Applications

IN PROGRESS (0) ACTIVE (0) INACTIVE (0)


#	Application ID	Application Type
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Requires Attention

PENDING (0) SUBMITTED (0)

#	Activity Type	Application ID
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Step 3: The first thing to do when starting an application is select, "Save Draft". Applicants are strongly encourage to routinely select "Save Draft" after completing each tab.

 SUPREME COURT OF PENNSYLVANIA
Pennsylvania Interest on
Lawyers' Trust Accounts Board

New Grant

Please click "**Save Draft**" at the bottom of the page once you are ready to begin the application.

PRIMARY PURPOSE TEST MISSION AND SERVICES PERFORMANCE STANDARDS CURRENT YEAR FINANCIAL INFORMATION CURRENT YEAR STAFFING AND CASES

* Is the organization a not-for-profit Pennsylvania corporation?
Please Select

* Is the organization tax exempt under Section 501(c)(3) of the Internal Revenue Code?
Please Select

* Does your organization charge fees of any kind to clients who receive civil legal services?
Please Select


* Directly from the organization's audit, what was its total audited expenditures for the most recently completed fiscal year?

* In the most recently completed fiscal year, what was the total amount of expenditures (including the audited value of pro bono legal services) associated with the provision of free civil legal assistance?

NOTE: Upon request, applicant must be able to provide a statement of accounting methodology. If you engage in non-IOLTA eligible activity (such as lobbying, impermissible subject matter representation) the amount reported in the question above.

* Civil Legal Assistance Acknowledgement
 I attest that all civil legal assistance is provided by an attorney licensed in Pennsylvania or a non-lawyer directly supervised by an attorney licensed in Pennsylvania.


NOTE: New applicants are strongly encouraged to contact Jim Swoyer at James.Swoyer@pacourts.us or 717-238-2001 x7002 to discuss whether your organization qualifies for consideration for funding.

 **Save Draft** **Submit**

Step 4: Certain tabs may have buttons for applicants to select rather than text boxes or menu style answers. On tabs with these buttons, as shown below, select the button to load the table.


PRIMARY PURPOSE TEST MISSION AND SERVICES PERFORMANCE STANDARDS **CURRENT YEAR FINANCIAL INFORMATION** CURRENT YEAR STAFFING AND CASES

Click on the button below to enter the volunteer and in-kind resources.

\$ In-Kind Resources 

* Please describe briefly the basis for your estimated value per hour for your volunteer resources.

Click on the button below to enter your budget and revenues.

\$ Budget & Revenue 

[← BACK](#)

Save Draft **Submit**

Step 5: Enter the data accordingly into the specified table. PLEASE NOTE: Applicants should be careful to only select the button once. Selecting the button multiple times will cause multiple windows to open at once. This can inadvertently cause your application to time out due to inactivity on an unintentionally opened tab. The system will automatically log users out after 2 continuous hours of inactivity on a page.

Step 6: Remember to select “Save” after you have finished entering data into the specified table. Then, select “Close” to return to the main application.

Volunteer and In-Kind Resources

Estimated Value of Volunteer Resources for the Current Fiscal Year

- Please provide the estimated amounts indicated below for the current fiscal year.
- Current Year = FYE December 31, 2018 or FYE June 30, 2019 or FYE September 30, 2019.
- When estimating amounts, reference your most recently completed program audit for guidance and/or apply your own judgment.

Other In-Kind

- Enter below the details of other in-kind resources the program expects to receive, such as space, postage, etc., in addition to the volunteer hours entered above.

Estimated Value of Volunteer Resources for the Current Fiscal Year

Volunteer Type	Hours of Service Donated	Dollar Value per Hour
Attorneys	<input type="text" value="0"/>	<input type="text" value=""/>
Other	<input type="text" value="0"/>	<input type="text" value=""/>
Total Volunteer Resources	0	

Step 1
Step 2

Step 7: If at any point you need to save and come back to your application, you may do so. Simply, select “Save Draft” on the main application form (see Step 3) and then log out.

Step 8: When you log back into the system, the application you started will be housed in a different section of the portal than where you started a new application. Please refer to the “My Applications” section for applications that are already in progress. Select “Open” to continue working on your application.

My Applications

IN PROGRESS (1) ACTIVE (0) INACTIVE (0)

#	Application ID	Application Type	Organization	Primary Contact	Last Modified	Status	
1	2018-1131	IOLTA Specialized Legal Services (Zone) Grant	Test Organization 2 - Law	Sam Test	2018-11-09 12:38	Draft	Open

Requires Attention

Step 9: When you are finished completing the application, select “Submit” to submit your application.

Upload

* IRS Form 990 - Most recently completed fiscal year

Upload

* IRS Form 990 - Two years ago

Upload

* Office Locations

Upload

* Signed Assurances Page

Click [here](#) to download the Assurances form.

Once you have signed the form, please upload it below.

Upload

< BACK

Save Draft Submit