



SUPREME COURT OF PENNSYLVANIA

Pennsylvania Interest on Lawyers' Trust Accounts Board

Technical Support Guide

Welcome to the Pennsylvania IOLTA Board's new grants management system: paiolta.smartsimple.com.

IOLTA offers grants to qualified Pennsylvania nonprofit legal aid organizations and Pennsylvania's nine law schools. Grant applications for the Specialized Legal Services ("Zone") and the Law School grant programs will be submitted through this online system.

This guide offers technical support on how to register and use the system. The first part gives instruction on how to register for an account. Part two provides information about how to start and submit an application.

General Information

All new users to the online grants management system must first register for an account using a unique email address. This email address will be used as your login when you need to sign into the system.

Before starting an application, please be aware that the Primary Contact is the first registered user to begin the application in the system. The Primary Contact will receive email notifications from the system that pertain to the proposal, and subsequent grant, if awarded funding. Additional organizational contacts can also view, edit, and submit the application. Though, there can only be one Primary Contact for each grant proposal.

How to Register for an Account

Step 1: Go to the [homepage](#) and select the Register button.

Login

Email

Password

Login

Forgot Password?

New to the System?

Register

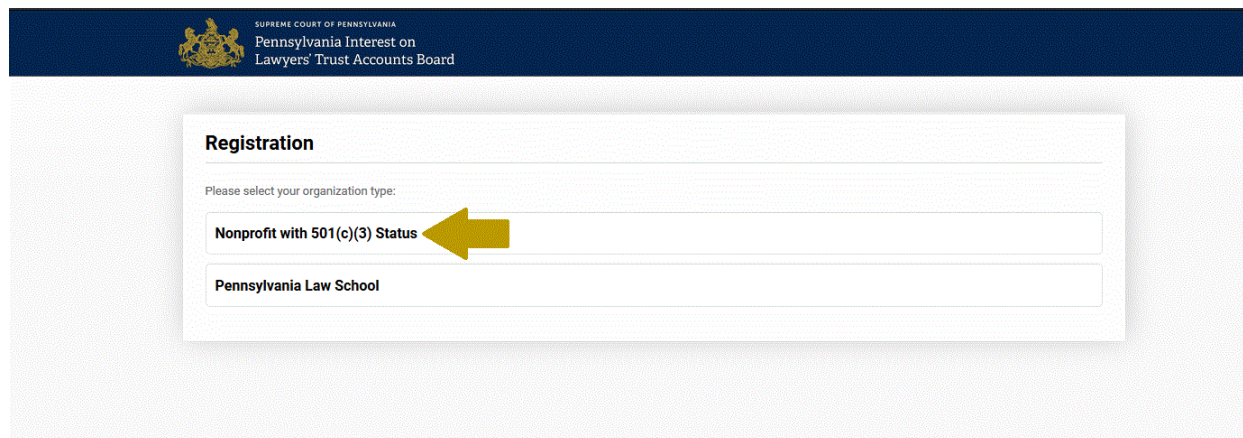
Pennsylvania Interest on Lawyers' Trust
Accounts Board

Awarding grants that support the provision of free legal assistance to low-income Pennsylvanians in civil matters where a basic human need, such as access to shelter, nutrition, or health care, is at stake.

For more information about the Pennsylvania IOLTA Board, visit our [website](#).

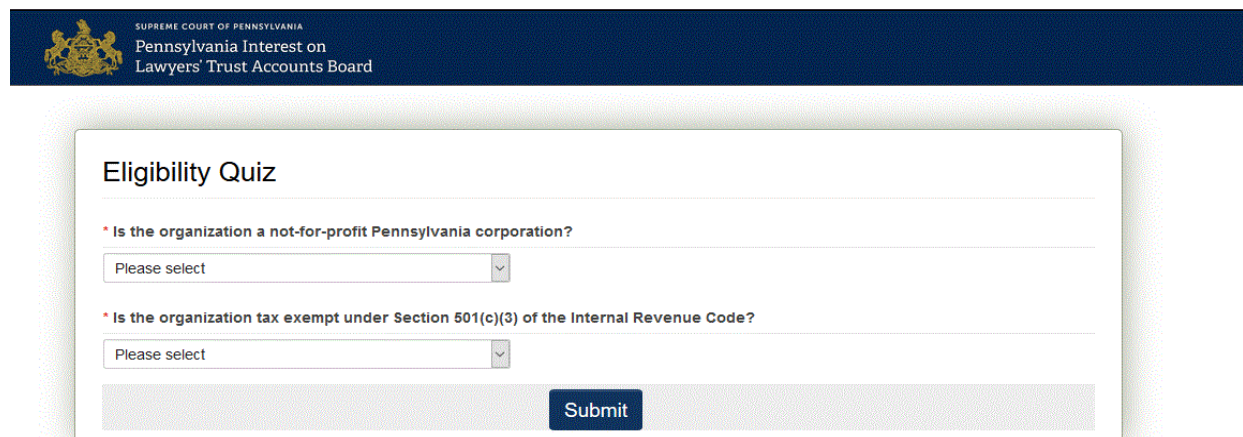
View [Registration Information](#) for instructions.

Step 2: A Registration page will appear. Select “Nonprofit with 501(c)(3) Status” from the options.




The screenshot shows the top of a web page with a dark blue header. On the left is the seal of the Supreme Court of Pennsylvania. To its right, the text reads: "SUPREME COURT OF PENNSYLVANIA", "Pennsylvania Interest on", and "Lawyers' Trust Accounts Board". Below the header is a white registration form. The form has a title "Registration" and a prompt "Please select your organization type:". There are two radio button options: "Nonprofit with 501(c)(3) Status" and "Pennsylvania Law School". A yellow arrow points to the "Nonprofit with 501(c)(3) Status" option.

Step 3: Please complete the *Eligibility Quiz* by answering the questions, then select the Submit button.



The screenshot shows the "Eligibility Quiz" section of the form. It has a title "Eligibility Quiz" and two questions, each with a dropdown menu. The first question is "Is the organization a not-for-profit Pennsylvania corporation?" with a dropdown menu showing "Please select". The second question is "Is the organization tax exempt under Section 501(c)(3) of the Internal Revenue Code?" with a dropdown menu showing "Please select". At the bottom right of the form is a blue "Submit" button.

Step 4: Input the organization's Federal Employee Identification Number (EIN) in the appropriate field and select the Search button.

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Organization Search

Instructions:
Please enter your organization name or organization EIN.
If you are unable to find your organization in the IRS database, don't yet have an EIN, or have other questions about the registration process, please contact Jim Swoyer, Grants Manager for the IOLTA Board, at 717.238.2001 x7002, or James.Swoyer@pacourts.us.

EIN
25-1802119

Name


Address

City

State / Province

Search



Step 5: Use the chevron button to select your organization from the list of options.

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Pennsylvania Interest on
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Organizations


Q Refine Search

Instructions:
Please select your organization by clicking on the chevron icon next to the desired organization.
If you are unable to find your organization in the IRS database, don't yet have an EIN, or have other questions about the registration process, please contact Jim Swoyer, Grants Manager for the IOLTA Board, at 717.238.2001 x7002, or James.Swoyer@pacourts.us.

#	EIN	Organization Name	Address	City	State	Zip Code	
1.	251802119	PENNSYLVANIA INTEREST ON LAWYER TRUST ACCOUNT BOARD	PO BOX 301	UNIONTOWN	PA	15401-0301	 

Record searched : 1,829,155. Records found : 1. Time used : 2 milliseconds

Step 6: The system will autofill *Organization Information* based on data stored in the IRS Database. You will have the chance to update this information once you have completed registration and logged into your account. Continue scrolling to the bottom to enter your *Contact Information* and select the Submit button.

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Organization Information

[Q Search IRS Database](#)

Instruction
Please fill out all information below.

* **EIN Number**
251802119

* **Organization Name**
PENNSYLVANIA INTEREST ON LAWYER TRUST ACCOUNT BOARD

* **Address**
PO BOX 301

Address 2

* **City**
UNIONTOWN

* **State**
Pennsylvania

* **Zip Code**
15401-0301

Phone

Web Site

* **Is the mailing address different from the address above?**
Please Select

Contact Information

[Copy Address](#)

* First Name

* Last Name

* Title

* Email

* Phone

Phone Ext.

* Address



Address 2

* City

* State

* Zip Code

[Submit](#)



Step 7: Once you have successfully registered, the system will generate an email to you with your username and password. After logging in, you will have the opportunity to change your password.

How to Complete an Application

Step 1: Go to the [homepage](#) and enter your account credentials, then select the Login button.

Supreme Court of Pennsylvania
Pennsylvania Interest on
Lawyers' Trust Accounts Board

Login

Email

Password

Login

[Forgot Password?](#)

New to the System?
[Register](#)

Pennsylvania Interest on Lawyers' Trust Accounts Board

Awarding grants that support the provision of free legal assistance to low-income Pennsylvanians in civil matters where a basic human need, such as access to shelter, nutrition, or health care, is at stake.

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View [Registration Information](#) for instructions.

Step 2: In the grantee portal, select the Apply Now button under *Funding Opportunities* to begin.

Supreme Court of Pennsylvania
Pennsylvania Interest on
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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.

[Organization Profile](#) [Personal Profile](#) [Change Password](#)

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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Step 3: When starting an application, you must first select the Save Draft button. Applicants are strongly encouraged to routinely select this button after completing each tab. If at any point you need to save and come back to your application, simply select the Save Draft button on the main application form and log out.

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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: When you sign back into the system, the application you started will be stored in a different section of the portal from where you began a new application. Please refer to the *Grant Proposals* section for applications that are in progress. Select the Open button to continue working on your application.

Grant Proposals

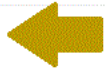
IN PROGRESS (5) ACTIVE (1) CLOSED (0)

#	Application ID	Application Type	Organization	Primary Contact	Last Modified	Status	
1	2019-1234	IOLTA Specialized Legal Services (Zone) Grant - A	Test Organization 2 - Law	Sam Test	2019-11-06 13:37	Under Review	Open

Step 5: On some tabs, applicants will select buttons instead of completing text box or menu style answers. Selecting these buttons will produce a table in a new browser window. Applicants should only press this once to avoid opening multiple windows to open at once.

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

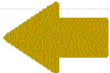
\$ In-Kind Resources



* 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 6: Enter your data into the table. Applicants should complete the table and select the Save button. Then, select the Close button 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

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"/>
Other	<input type="text" value="0"/>	<input type="text"/>
Total Volunteer Resources	<input type="text" value="0"/>	<input type="text"/>

Step 1



Save

Close

Step 2



Step 7: When you are finished completing the application, select the Submit button to submit your application. Upon submission, the Primary Contact will receive a system-generated message containing a PDF Summary of the information submitted. Applicants are advised to check their Junk folder if they do not immediately see a system-generated message.



* IRS Form 990 - Most recently completed fiscal year



* IRS Form 990 - Two years ago



* Office Locations



* Signed Assurances Page

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

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



[← BACK](#)

Save Draft

✓ Submit



Additional Support

Please direct questions related to SmartSimple or general technical support inquiries to:

Brianna Bosak
Assistant Grants Manager
Pennsylvania IOLTA Board
717-238-2001 ext. 7005
brianna.bosak@pacourts.us