



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. 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 may view, edit, and submit the application, however, 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

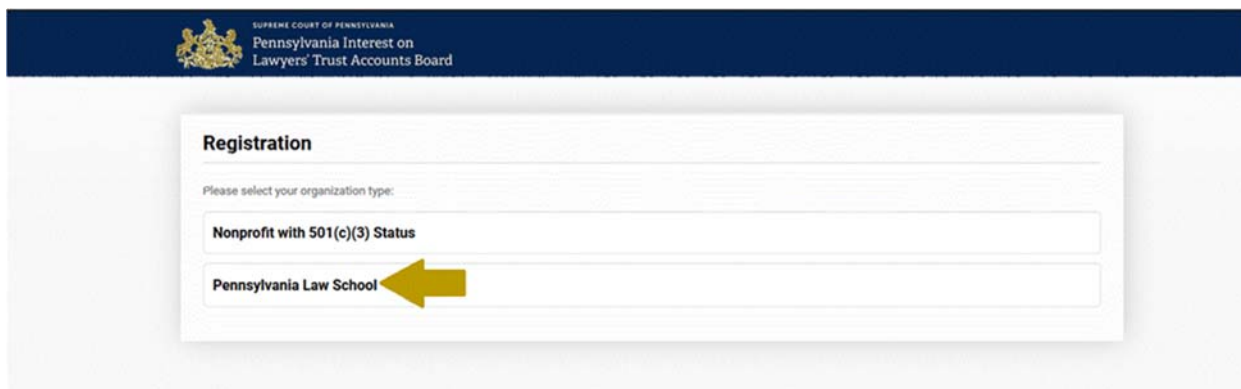
Pennsylvania Interest on Lawyers' Trust
Accounts Board

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](#).

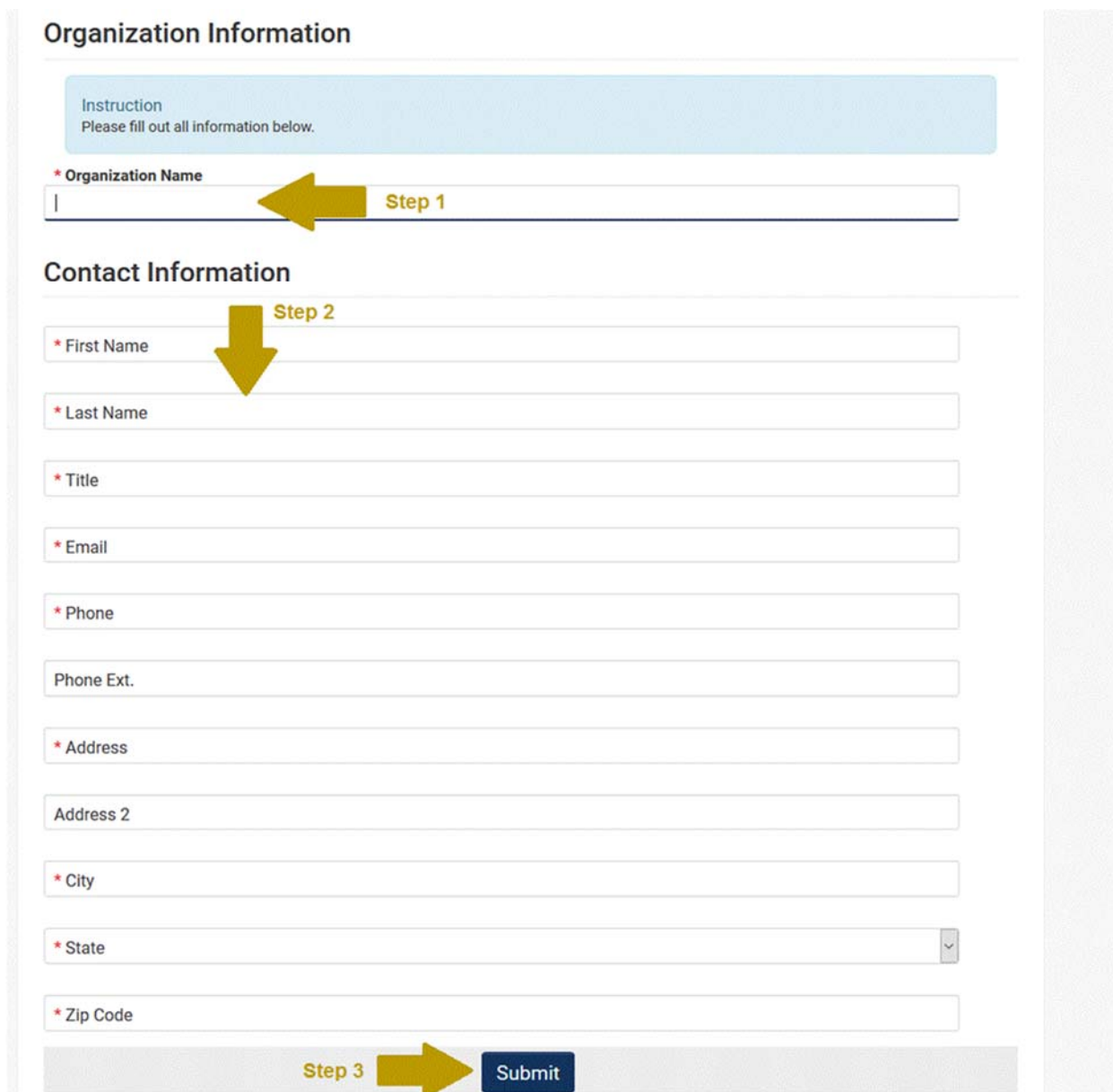
View [Registration Information](#) for instructions.

Step 2: A Registration page will appear. Select "Pennsylvania Law School" from the options.



The screenshot shows the top of a web page with a dark blue header. On the left is the logo of the Supreme Court of Pennsylvania. To the right of the logo, 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 sub-header "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 "Pennsylvania Law School" option.

Step 3: Starting with *Organization Name*, input the name of your school. The system will provide a list of Universities to choose from. Select your school, then enter your contact information. Select the Submit button.



The screenshot shows a registration form with two main sections: "Organization Information" and "Contact Information".

Organization Information

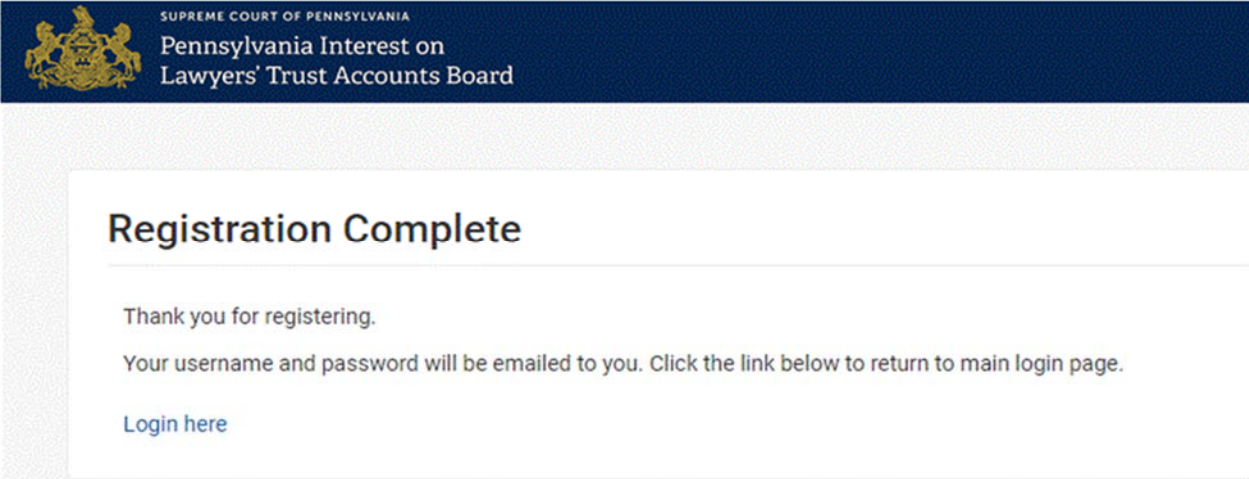
- An instruction box says: "Instruction Please fill out all information below."
- A required field labeled "* Organization Name" has a yellow arrow pointing to it with the text "Step 1".

Contact Information

- A required field labeled "* First Name" has a yellow arrow pointing to it with the text "Step 2".
- Other required fields include: "* Last Name", "* Title", "* Email", "* Phone", "* Address", "* City", "* State" (a dropdown menu), and "* Zip Code".

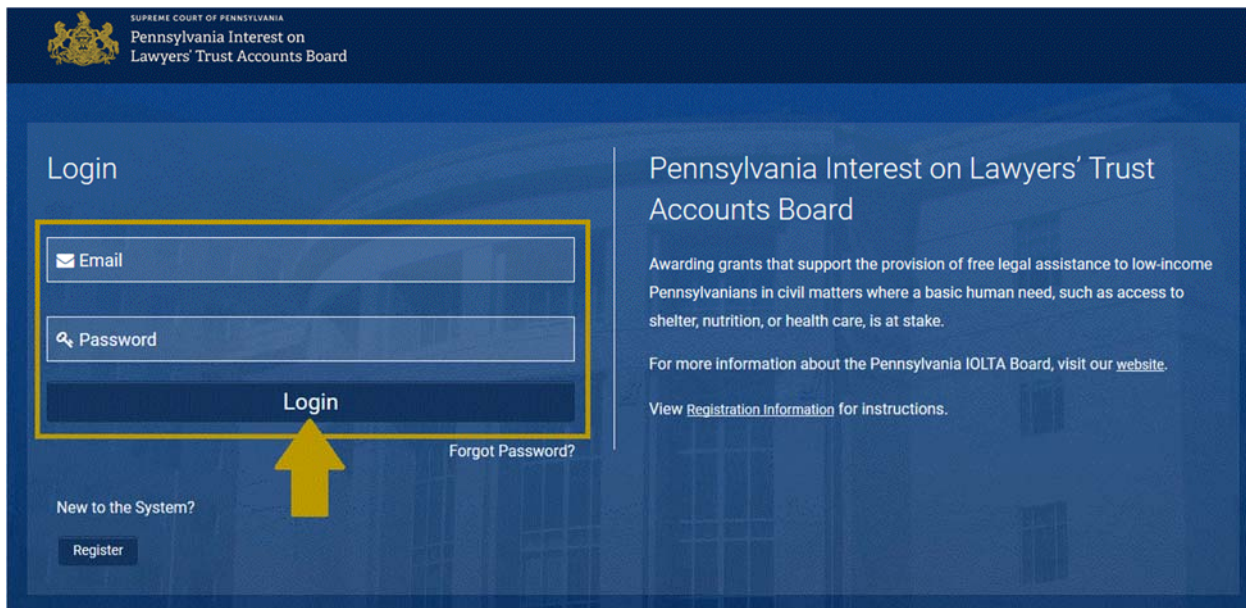
At the bottom of the form is a grey bar containing a yellow arrow pointing right with the text "Step 3" and a blue "Submit" button.

Step 4: A confirmation page will appear confirming your registration. 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.



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

WELCOME TO YOUR GRANTEE PORTAL!

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 Law School 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.

NEW GRANT

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

LAW SCHOOL IOLTA PROGRAMMING FUNDAMENTAL CRITERIA OTHER PROPOSAL FACTORS LAW SCHOOL COMMITMENT PROGRAM STATISTICS PROPOSED BUDGET

Executive Summary

Describe the proposed activities to occur with IOLTA financial support.

800 words left

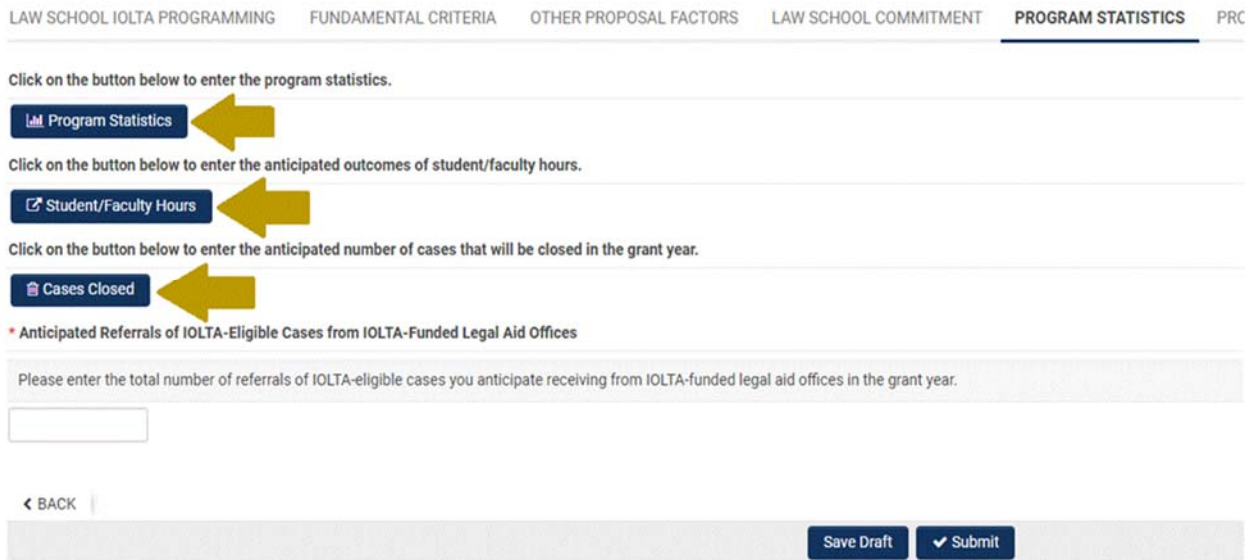
Save Draft Submit

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.



#	Application ID	Application Type	Organization	Primary Contact	Last Modified	Status	
1	2018-1183	IOLTA Law School Grant	Test Organization 2 - Law	Sam Test	2019-11-22 11:27	Draft	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.



LAW SCHOOL IOLTA PROGRAMMING FUNDAMENTAL CRITERIA OTHER PROPOSAL FACTORS LAW SCHOOL COMMITMENT **PROGRAM STATISTICS** PRC

Click on the button below to enter the program statistics.

[Program Statistics](#)

Click on the button below to enter the anticipated outcomes of student/faculty hours.

[Student/Faculty Hours](#)

Click on the button below to enter the anticipated number of cases that will be closed in the grant year.

[Cases Closed](#)

* Anticipated Referrals of IOLTA-Eligible Cases from IOLTA-Funded Legal Aid Offices

Please enter the total number of referrals of IOLTA-eligible cases you anticipate receiving from IOLTA-funded legal aid offices in the grant year.

Step 6: Enter your data into the table. Applicants should complete the table and select the Save button. Applicants should select the Close button to return to the main application.

Program Statistics

Complete the breakdown of ACTUAL statistics for the 2017-2018 grant year and PROJECTED statistics for the 2019-2020 grant year.

Statistics are for ALL law school clinical and internship/externship for-credit programs combined, not just those that receive IOLTA funding. Statistics should include those that result from the requested IOLTA funding and other law school sources. In preparing your projections, receive the total funding for which you have budgeted.

Clinical Programs

Programs	ACTUAL for Academic Year 2017-2018	PROJECTED for Grant Year 2019-2020
Number of available slots	<input type="text"/>	<input type="text"/>
Number involving live client contacts	<input type="text"/>	<input type="text"/>
Number of students enrolled	<input type="text"/>	<input type="text"/>
Number of credits awarded	<input type="text"/>	<input type="text"/>
Direct expenses	<input type="text"/>	<input type="text"/>
Matters completed for clients	<input type="text"/>	<input type="text"/>

Clinical Programs - Student Faculty

Programs	ACTUAL for Academic Year 2017-2018	PROJECTED for Grant Year 2019-2020
Student-faculty ratio	<input type="text"/>	<input type="text"/>

Internship/Externship Programs

Programs	ACTUAL for Academic Year 2017-2018	PROJECTED for Grant Year 2019-2020
Number of available slots	<input type="text"/>	<input type="text"/>
Number involving live client contacts	<input type="text"/>	<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.

LAW SCHOOL IOLTA PROGRAMMING FUNDAMENTAL CRITERIA OTHER PROPOSAL FACTORS LAW SCHOOL COMMITMENT PROGRAM

* Law School Assurances

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:

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Pennsylvania IOLTA Board
717-238-2001 ext. 7002
James.Swoyer@pacourts.us