Introduction to the Fund Advisor Portal

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Navigation

Once you’ve created an account and logged into the fund portal, click on the fund you wish to access.

Choose Fund

Community Action Fund

Greatest Needs Fund

The Fund Portal Home Page will show the name of the fund, the different tabs of information, the current balance of the fund, and the remaining spendable if the fund is endowed, as well as the Fund Advisors for the fund.

The tab you select will be highlighted in dark blue.
Tabs and what they do

HOME – shows the general information on the fund listed above

CHOOSE FUND – lets you view a different fund that you advise

CONTRIBUTIONS – shows donations which can be sorted by Date, Contributor, Type, and Amount – clicking on the Contributor’s name allows you to view all donations/gifts from that individual or organization to your fund.

GRANTS – gives a summary of grants out of your fund to organizations, showing a count of the total number per organization and the total amount granted to them. Clicking on the organization’s name shows you the fund’s history of grants to that individual organization, including purpose and amount per individual grant.

GRANT REQUEST – for donor advised and organizational funds, this is where grant recommendations can be made. It allows you to select a recipient from a previous grant, select a foundation fund, search for a grant recipient, or enter the information manually. This also shows the most recent grants from your fund, as well as their status. See below for information on how to submit a grant request.

STATEMENTS – Allows you to view published statements for your fund by clicking the blue View. These are generated by the finance department, so may not appear in the portal immediately after a quarter ends. As you will not be able to generate a custom date range statement, please email Patty at pmacdonald@ghacf.org or Mary at mbrimmer@ghacf.org for assistance or if you have any questions regarding your statements.

Statements

<table>
<thead>
<tr>
<th>Description</th>
<th>Date Range</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund Statement 2022/06/30 - College Access</td>
<td>01/01/2022 - 06/30/2022</td>
<td></td>
</tr>
</tbody>
</table>

DONATE – Allows you to donate to a variety of foundation funds.

LOGOUT – logs you out of your fund portal account.
To Recommend a Grant

You can copy a previous grant’s information OR look up an organization through the Grant Request Tab.

To look up an organization:

Go to the **Grant Request** tab

Selecting a **Grantee you have given to in the past** via the dropdown menu will automatically take you to the request form without a need for any additional information.

Selecting a fund from the **Other Foundation Funds** drop down will do the same – allowing you to enter the amount, special instructions, and if it’s anonymous or recurring.

**Searching For a Grantee** will let you input the **Name** (or a part of the name), **City** (if known), and **State** (if known). The more information included in the initial search allows for a more targeted list to generate. You may also search for other foundation funds here by using the **Name** field.

The results will show **all options available within the GHACF database**. This may be over several pages so be sure to check if a blue **Next Page** is below the list.
If the organization does not show up, you can either search again using different or broader information or select the gray **GuideStar Results** at the top of the search, which will search the GuideStar Database for potential matches. The list you are viewing will be highlighted in navy.

If the organization you wish to give to is listed, select the blue **Create Request** next to the organization name to generate a request form.

*Please note* that certain organizations, like religious institutions, educational institutions, and government entities, may not be listed under GuideStar due to their IRS classification. They may still qualify for a grant even if they don’t show within the GuideStar Database. Please email Adrienne Whisman (awhisman@ghacf.org) for more information or questions related to this.

If the organization is **not** in the GHACF or GuideStar Databases, you may enter the information manually using the form at the bottom of all grant request pages (pictured to the left). All **required information** will have a **red star** next to it – though if you are unsure of the exact name, address, etc. of an organization, your best guess is fine! The GHACF staff will always perform due diligence to ensure our records are updated and as accurate as possible.

Once you’ve filled out the manual entry form, hit **submit** to get to the request form.
Once you’ve selected or entered your recipient organization’s name, the New Grant Request Form will prompt you to fill in additional details.

The Description Box allows for any special designations or instructions.

A grant can be marked anonymous and/or recurring, and files can be uploaded as supporting documents for the request (this could be information on the project, the appeal letter, minutes, or a communication about potential funding opportunities). No attachment description is needed unless you feel it is necessary.

These documents will be submitted along with your request and viewable by foundation staff.

Once you’ve filled in all relevant fields, you can hit review.

When you hit review, you are given an overview of the grant, which you can then Edit Request or Submit Request.

To copy a previous grant request

Please note, every processed grant from your fund will have a COPY button next to it. Clicking the Copy button allows you to copy the Grant Recipient, the special instructions (Description), and Amount into a new grant request – allowing you to review the information and submit it easily.

This allows you to easily repeat a grant. If you’d like to make this specific grant recurring, you can easily do so here as well (instructions for this are on the next page).

Continue to fill out the rest of the Request form as needed and follow the normal grant request directions in order to submit it.
To make a grant request recurring.

Check the **Recurring Box** in the **Grant Request Form**.

Set a start **Date** (either the day’s date or a set date like the first of the month)

Set the **recurrence interval** (Monthly, Quarterly, twice a year, Annually) and

How many **instances of recurrence** (leaving it blank sets no end date)
Once Submitted

Your grant history will reflect the new request as soon as you hit Submit. You can cancel a request by clicking the yellow Cancel button next to it.

<table>
<thead>
<tr>
<th>Date</th>
<th>Status</th>
<th>Recipient</th>
<th>Description</th>
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</tr>
</thead>
<tbody>
<tr>
<td>10/31/2022</td>
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</tbody>
</table>

Once the grant has been reviewed and the GHACF staff has begun processing it, the grant status will change to Pending and the grant can no longer be canceled. If you need to edit or cancel a request once it’s pending, please email Adrienne Whisman at awhisman@ghacf.org.

<table>
<thead>
<tr>
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<th>Description</th>
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Once a grant request has been vetted and approved by staff, the status will update to Approved.

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Once a check has been created, the status will update to Paid.

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<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/31/2022</td>
<td>Paid</td>
<td></td>
<td></td>
<td></td>
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</tbody>
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Once the grant has been mailed, the status will update to Complete.