

# Introduction to the Fund Advisor Portal

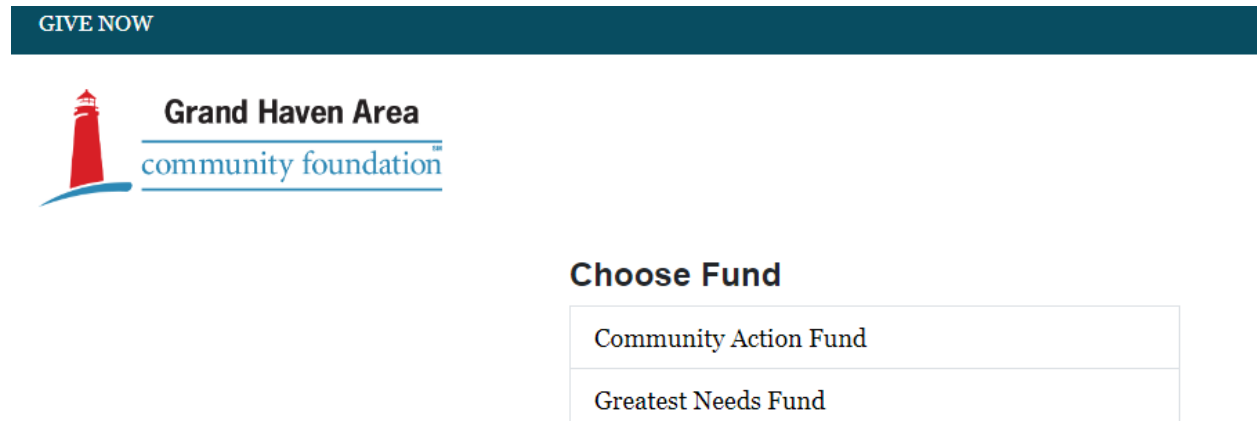
Click on a section under Contents to navigate to those specific instructions.

## Contents

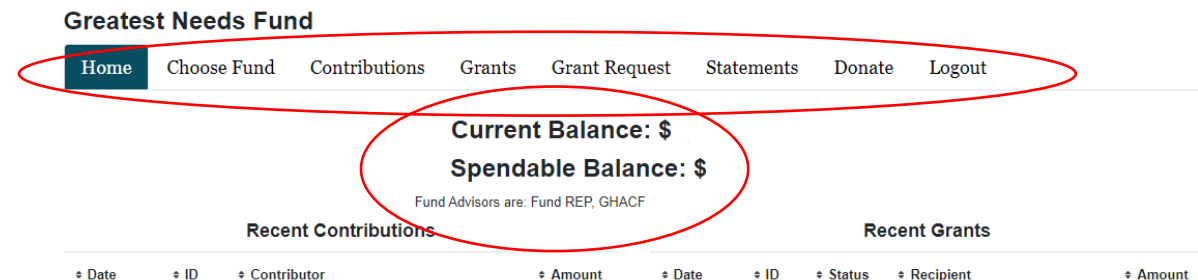
Navigation .....	1
Tabs and what they do.....	2
To Recommend a Grant .....	3
To look up an organization: .....	3
To copy a previous grant request .....	5
To make a grant request recurring.....	6
Once Submitted .....	7

## Navigation

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



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](mailto:pmacdonald@ghacf.org) or Mary at [mbrimmer@ghacf.org](mailto:mbrimmer@ghacf.org) for assistance or if you have any questions regarding your statements.

### Statements

Description	Date Range	
Fund Statement 2022/06/30 - College Access	01/01/2022 - 06/30/2022	<a href="#">View</a>

**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

The screenshot shows the 'Greatest Needs Fund' website with the 'Grant Request' tab selected. The page includes a navigation menu with 'Home', 'Choose Fund', 'Contributions', 'Grants', 'Grant Request', 'Statements', 'Donate', and 'Logout'. The 'Grant Request' tab is highlighted. Below the navigation, there is a section for 'Choose from previous grantees' with a dropdown menu. To the right, there is a table of grants with columns for Date, Status, Recipient, Description, and Amount. The table contains two rows of data, with some cells redacted with black boxes.

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 screenshot shows the 'Search for other Grantees' form. It has two columns. The left column has input fields for 'Name', 'City', and 'State', followed by a 'Search' button. The right column has a 'Search again' section with input fields for 'Name', 'City', and 'State', followed by a 'Search' button.

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.

Grantee Search Results for "Tri-Cities"		Grantee Search Results for "Tri-Cities"	
Grand Haven Area Community Foundation Results		Grand Haven Area Community Foundation Results	
GuideStar Results		GuideStar Results	
Name	City / State	Name	City / State
<a href="#">Create Request</a> Tri-Cities Area Habitat for Humanity	Grand Haven, MI	<a href="#">Create Request</a> Tri-Cities Alamo Club	Grand Haven, MI
<a href="#">Create Request</a> Tri-Cities Area Imagination Library Inc	Spring Lake, MI	<a href="#">Create Request</a> Tri-Cities Kids League	Grand Haven, MI
<a href="#">Create Request</a> Tri-Cities Broadcasting Foundation	Grand Haven, MI	<a href="#">Create Request</a> Tri-Cities Chautauqua Inc	Grand Haven, MI
<a href="#">Create Request</a> Tri-Cities Broadcasting Foundation Inc.	Grand Haven, MI	<a href="#">Create Request</a> Tri-Cities Football Club	Grand Haven, MI
<a href="#">Create Request</a> Tri-Cities Chautauqua	Grand Haven, MI	<a href="#">Create Request</a> Tri-Cities Right To Life	Grand Haven, MI
<a href="#">Create Request</a> Tri-Cities Family YMCA	Grand Haven, MI	<a href="#">Create Request</a> Tri-Cities Kids at Play, Inc.	Grand Haven, MI
<a href="#">Create Request</a> Tri-Cities Historical Museum	Grand Haven, MI	<a href="#">Create Request</a> Tri-Cities Garden Club Inc.	Spring Lake, MI
<a href="#">Create Request</a> Tri-Cities Kids League	Grand Haven, MI	<a href="#">Create Request</a> Tri-Cities Learning Center	Grand Haven, MI
<a href="#">Create Request</a> Tri-Cities Klavins Foundation	Grand Haven, MI	<a href="#">Create Request</a> Tri-Cities Historical Museum Inc.	Grand Haven, MI
<a href="#">Create Request</a> Tri-Cities Mentees Initiative	Grand Haven, MI	<a href="#">Create Request</a> Tri-Cities Area United Fund	Holland, MI

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](mailto:awhisman@ghacf.org)) for more information or questions related to this.

or

Enter Grantee information manually

Name \*

Address \*

City \*

State \*

Zipcode \*

Phone \*

Email

\* required information

**Submit**

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.

Enter Grantee information manually

Name \*

Address \*

Tri-Cities

Once you've filled out the manual entry form, hit **submit** to get to the request form.

**New Grant Request**

Grantee

Description  0/255 characters

Amount

Anonymous

Recurring

Attachment  No file chosen (or drag and drop anywhere on the page)

Attachment Description

[Review](#)

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.

**Review New Grant Request**

Grantee

Description

Amount

Anonymous No

Recurring Yes

Recurrence Start Date 10/05/2022

Recurrence Interval Monthly

Number of Recurring (or blank) 4

[Submit Request](#) [Edit Request](#)

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.

Home Choose Fund Contributions **Grants** Grant Request Statements Donate Logout

**Grants**

ID	Date	Status	Recipient	Description	Amount
1971	05/28/2019	Complete	REDACTED	REDACTED	REDACTED

[Copy](#)

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)

The image displays two side-by-side screenshots of a 'New Grant Request' form. The left screenshot shows the initial state of the form with several elements circled in red: the 'Anonymous' checkbox, the 'Attachment' section (including a 'Choose Files' button and a text area), and a 'Review' button. The right screenshot shows the form after configuration for a recurring request. The 'Recurring' checkbox is checked, the 'Recurrence Start Date' is set to 10/05/2, the 'Recurrence Interval' dropdown is set to 'Monthly', and the 'Number of Recurring' field is set to 4. A dropdown menu for 'Recurrence Interval' is open, showing options: Monthly, Quarterly, Semi-Annually, and Annually. Red arrows indicate the flow of configuration: one arrow points from the 'Recurring' checkbox in the left screenshot to the checked box in the right screenshot, and another arrow points from the 'Recurrence Interval' dropdown in the right screenshot to the 'Monthly' option in the open dropdown menu.

## 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.

↕ Date	↕ Status	↕ Recipient	↕ Description	↕ Amount	↕
10/31/2022	Request	[REDACTED]	[REDACTED]	[REDACTED] 00	Cancel

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](mailto:awhisman@ghacf.org).

↕ Date	↕ Status	↕ Recipient	↕ Description	↕ Amount	↕
10/31/2022	Pending	[REDACTED]	[REDACTED]	[REDACTED]	

Once a grant request has been vetted and approved by staff, the status will update to **Approved**.

↕ Date	↕ ID	↕ Status	↕ Recipient	↕ Amount
10/31/2022	30667	Approved	[REDACTED]	[REDACTED]

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

↕ Date	↕ Status	↕ Recipient	↕ Description	↕ Amount	↕
10/31/2022	Paid	[REDACTED]	[REDACTED]	[REDACTED]	

Once the grant has been mailed, the status will update to **Complete**.

↕ Date	↕ Status	↕ Recipient	↕ Description	↕ Amount	↕
10/31/2022	Complete	[REDACTED]	[REDACTED]	[REDACTED]	