

Introduction to the Fund Advisor Portal

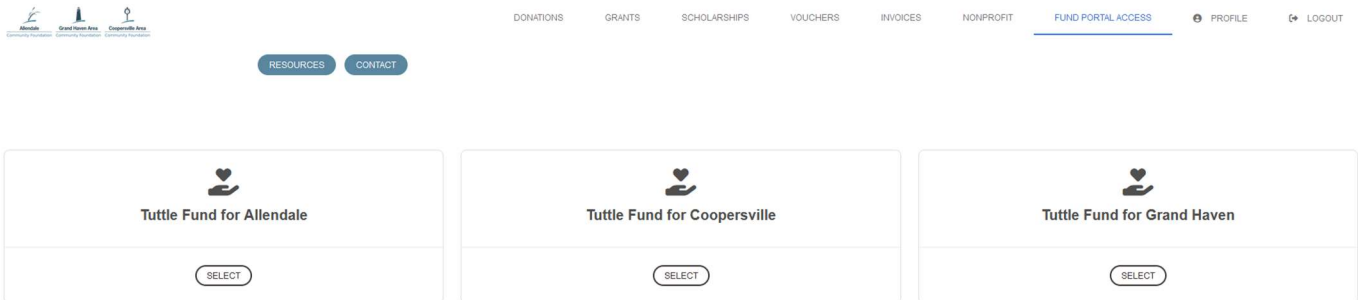
Click on a section under Contents to navigate to those specific instructions.

Contents

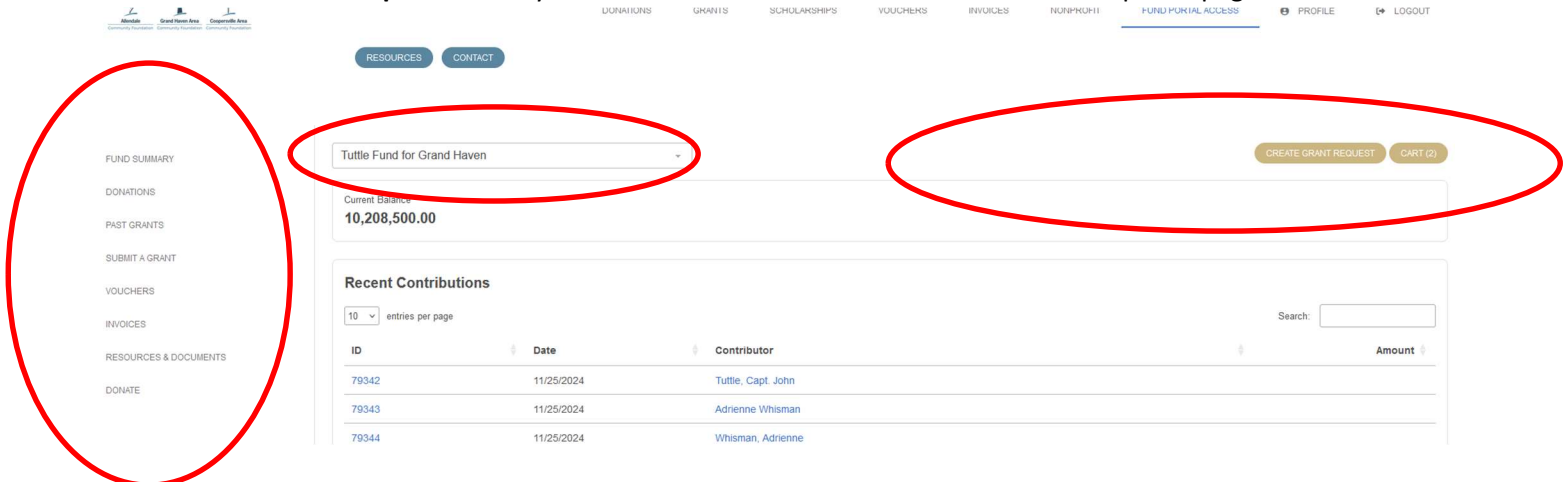
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Navigation

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



The **Fund Summary** page will show the name of the fund, an overview of recent contributions and grants, the **current balance** of the fund, and the **remaining spendable** if the fund is endowed, as well as buttons to **Create Grant Request** and for your **Cart**. These buttons are available on all fund portal pages.



Additional fund portal pages are accessible on the lefthand side of the page.

Sections and what they do

FUND SUMMARY – shows the general information on the fund listed above.

FUND NAME – selecting your fund name allows you view a different fund that you advise.

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

PAST 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 History lets you view all individual grants and copy them for a new request. Recurring Grants allows you to view all grants set up to automatically disburse.

SUBMIT A GRANT – for donor advised and organizational funds, this is where grant recommendations can be made. 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.

RESOURCES AND DOCUMENTS (STATEMENTS) – Allows you to view published statements for your fund. 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 contact us for assistance or if you have any questions regarding your statements.

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

LOGOUT – logs you out of your fund portal account and is found in the top right corner of the page.

Additionally, the main header pictured below includes important tabs as well.



PROFILE – Allows you to view and update your primary contact information on file with the foundation, view and update your login username, and change your password. It also allows you to state your preferred method of contact, and if you have any areas of interest.

DONATIONS – Provides an overview of donations you've given, including recurring ones.

SCHOLARSHIPS – if your fund awards scholarships, this tab provides an overview of past awards.

GRANTS – if you are a nonprofit, this tab lets you view grants given to your organization.

CONTACT – Brings you to the main contact page on the GHACF website which includes a general contact form as well as staff information and an overview of each person's role.

RESOURCES – Redirects to the general GHACF Resources page which includes grant recommendation forms, the Donor Advised Fund Handbook, and more.

To Recommend a Grant

You can copy a previous grant's information **OR** create one through the SUBMIT A GRANT Tab.

To look up an organization:

The screenshot shows the 'Grant Request' form interface. At the top, there is a navigation bar with links for DONATIONS, GRANTS, SCHOLARSHIPS, VOUCHERS, INVOICES, NONPROFIT, and FUND PORTAL ACCESS. Below this, there are buttons for RESOURCES and CONTACT. The main form area has a dropdown menu for 'Tuttle Fund for Grand Haven'. A callout box points to the 'CREATE GRANT REQUEST' button, which is circled in red. Below the form, there are three tabs: 'PREVIOUS GRANTEE', 'SEARCH GRANTEE', and 'MANUAL GRANTEE'. Callout boxes provide detailed instructions for each of these tabs. The 'PREVIOUS GRANTEE' tab allows viewing past grantees and searching for other funds. The 'SEARCH GRANTEE' tab allows searching the GHACF database, GuideStar Database, and past grantees. The 'MANUAL GRANTEE' tab allows inputting contact information for organizations not found in the databases.

Select the **Create Grant Request** Tab to submit new grants.

Use this form to request a new grant or contribution from your fund. Select a grantee from the drop-down menu or enter a new nonprofit. You can also attach any relevant documents to your request.

NEW! the grant submission now allows you to batch submit grant recommendations. Once you've created all of your requests, be sure to select [Review and Submit Grant Requests](#) located under the [Grant Request](#) tab.

The Grand Haven Area Community Foundation will receive notification of your request and process your grant.

We will notify you once the grant has been completed.

Grants already processed from your fund are listed.

If you have any questions, please reach out to Adrienne Whisman at awhisman@ghacf.org

Grant Request > Choose Type

PREVIOUS GRANTEE **SEARCH GRANTEE** **MANUAL GRANTEE**

Search Grantee allows you to search the GHACF database, the GuideStar Database, and organizations you have given to in the past, including foundation funds.
See next page for additional details.

Previous Grantee allows you to view grantees you've given to in the past. It also allows you to search for other foundation funds.

Manual Grantee allows you to input the organization's contact information if you can't find it using SEARCH GRANTEE. If you are unsure about a required field, or if you do not know the information, a substitute can be used (e.g., 555-555-5555).

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), **State** (if known), and **EIN** or Federal Tax-ID (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.

Grant Request > Choose Type > Search

Search for Grantees

Grantee Name

City State

EIN

SEARCH

The results will show **all options available within the GHACF database**. This may be over several pages so be sure to check if a gold **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 gold **Candid Results** at the top of the search, which will search the Candid Database for potential matches. The list you are viewing will be highlighted in blue.

If the organization you wish to give to is listed, select **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 Candid/GuideStar due to their IRS classification. They may still qualify for a grant even if they don’t show within the Candid/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 Candid Databases, you may enter the information manually. This form requires a **Name** and **complete address** – though if you are unsure of the exact details, your best guess is fine! The GHACF staff will always perform due diligence to ensure our records are updated and as accurate as possible.

Grant Request > Choose Type > Search

Enter Grantee information manually

Grantee Name

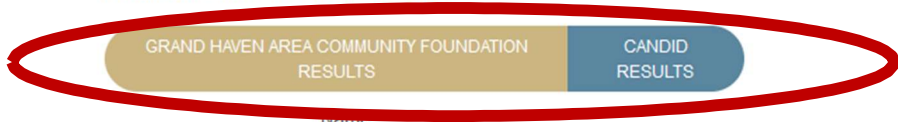
Street Address Apartment, Suite, ...

City State Zipcode

Email Phone

SUBMIT

Search Results for "ducks"

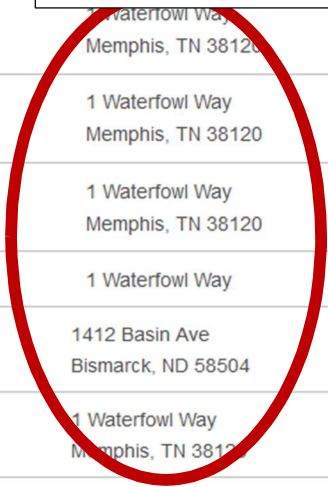


Using **Search for other Grantees** will show **organizations and funds** already in the GHACF system. If you select **Candid Results** at the top, this will show all tax- exempt organizations who are required to file (schools, religious organizations, municipalities/government entities, etc. normally do not show up in Candid – but can still be granted to if they meet other requirements).

Name	Address	Phone
CREATE REQUEST Ducks Unlimited Inc.		
CREATE REQUEST Ducks Unlimited, Inc.-GROUP RETURN		
CREATE REQUEST Ducks Unlimited, Inc.-DUCKS AT DAWN		39-1719332
CREATE REQUEST Ducks Unlimited, Inc.-DUCKS R BAC	1 Waterfowl Way Memphis, TN 38120	45-0451893
CREATE REQUEST Ducks Unlimited, Inc.-DUCKS UNLIMITED WOMEN	1 Waterfowl Way Memphis, TN 38120	74-2474053
CREATE REQUEST Ducks Unlimited, Inc.-DUCKS UNIVERSITY RENO NV46	1 Waterfowl Way	47-3187596
CREATE REQUEST Delta Waterfowl Foundation	1412 Basin Ave Bismarck, ND 58504	53-0259796
CREATE REQUEST Ducks Unlimited, Inc.-SEA DUCKS	1 Waterfowl Way Memphis, TN 38120	91-1519382

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[NEXT PAGE](#)



Make sure to triple check the Address before hitting Create!

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.

Grants [EXPORT](#)

10 entries per page Search:

ID	Date	Status	Grantee	Description	Advisor	Amount
41526	10/10/2024	paid	Doctors Without Borders, Inc	test grant to other org for sandbox	Tuttle, Capt. John	1,000.00 COPY

Showing 1 to 1 of 1 entry « 1 »



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.

Grant Request

Requested By: Tuttle, Capt. John

Grantee: Ducks Unlimited, Inc.-DUCKS R BAC

Description: [Empty text box]

Amount: [Empty text box]

Anonymous:

Recurring:

Attachment: Browse... No files selected. (or drag and drop anywhere on the page)

Attachment Description: [Empty text box]

Additional Information: [Empty text box]

ADD TO CART

Once you've selected or entered your recipient organization's name, the **New Grant Request Form** will prompt you to fill in additional details.

Requested By allows you to designate which advisor(s) should receive credit and be publicly mentioned in the check letter.

The **Description Box** allows for any special designations or instructions.

Selecting **Anonymous** will automatically redact your fund name as well as your donor information normally included in the letter that accompanies the grant check.

A grant can be marked **anonymous** and/or **recurring**, and **files can be uploaded** as supporting documents for the request (e.g., 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 completed the form, select **ADD TO CART**. You can then create additional grants or select **VIEW CART / REVIEW GRANT REQUESTS**.

To make a grant request recurring.

To create automatically renewing grants, check the **Recurring Box** in the **Grant Request Form**.

Requested By: Tuttle, Capt. John

Grantee: John Tuttle

Description: [Empty text box]

Amount: [Empty text box]

Anonymous:

Recurring:

Recurrence Start Date: [Empty text box]

Recurrence Interval: Monthly

Number of Recurring (or blank): [Empty text box]

Attachment: Browse... No files selected. (or drag and drop anywhere on the page)

Attachment Description: [Empty text box]

Additional Information: [Empty text box]

ADD TO CART

-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, etc.)

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

This can be used if you'd like to give annually, monthly, quarterly, etc. to an organization for the same project or reason and the same amount each time.

The amount entered is the amount to be granted each time (e.g., \$2,000 monthly would be \$24,000 a year).

Bulk Submit Your Grant Requests

NEW! The portal now allows you to bulk submit requests. Once all your recommendations are in, under the **Grant Request** tab, you will see a list of your current requests for review. Select **Review Grant Requests** to confirm the details and submit.

This is mandatory to allow your request to reach foundation staff!

Grant Request Cart

REVIEW GRANT REQUESTS

	Recipient	Description	Amount	
DELETE	Greatest Needs Fund	general support	1,000.00	EDIT
DELETE	Delta Waterfowl Foundation	support	4,000.00	EDIT
Grant Request Total			5,000.00	

Once you've confirmed all the details are correct, select **Submit Requests** to send them to the foundation to process.

If you need to edit or delete any request, simply return to the **Grant Request** page and select the blue **Delete** button or the blue **Edit** button next to the request.

Grant Request Cart

Grantee	Description		
Greatest Needs Fund	general support		
Delta Waterfowl Foundation	support	\$ 4,000.00	No
Additional Information:			
Recurrence Start Date: 01/15/2025			
Recurrence Interval: Quarterly			
Number of Recurring (or blank): 8			
Total			\$ 5,000.00

SUBMIT GRANT REQUESTS

To submit your grants, select VIEW CART / REVIEW GRANT REQUESTS. From there you can edit or delete any grant. Once you've finished with your review. Select REVIEW GRANT REQUESTS. This will provide an overview of what is currently in your grant cart.

Hit SUBMIT GRANT REQUESTS to send them to the foundation for processing.

A successful submission will show a green dialog box with “**Grant Request Submitted**”. From here, you can either close the tab or click **Continue**.

Tuttle Fund for Grand Haven

Grant Request Submitted

CONTINUE

Grants

Request Date	Status	Recipient	Description	Amount	
01/16/2025	Request	Doctors Without Borders, Inc	general support test	500.00	CANCEL
01/16/2025	Request	Tuttle, Capt. John	test	500.00	CANCEL
01/16/2025	Request	Doctors Without Borders, Inc	test grant to other org for sandbox	1,000.00	CANCEL
01/16/2025	Request	Tuttle, Capt. John	v	10,000.00	CANCEL
01/16/2025	Request	Doctors Without Borders, Inc	g	10,000.00	CANCEL
12/12/2024	Paid	John Tuttle	test grant with multiple payments	50,000.00	
10/10/2024	Paid	Doctors Without Borders, Inc	test grant to other org for sandbox	1,000.00	
10/10/2024	Paid	John Tuttle	test grant for grantees	8,524.00	

Once submitted the **Grant Request** tab will show the status of the request. If the request has not been processed by the GHACF, you can still **Cancel** the request by clicking the blue **Cancel** button next to it. If that button is no longer there or you need to edit a grant, please reach out to foundation staff.

Please note that foundation staff are able to view in progress grant carts. This allows us to reach out if we notice a recommendation has not been submitted to confirm your intent.

Please also note that once a grant has been processed, a confirmation email or letter will be sent to you confirming the details and the grant Status will be marked as “complete.”

Once Submitted

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

01/16/2025	Request	Tuttle, Capt. John	v	10,000.00	CANCEL
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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.

01/16/2025	Pending	Doctors Without Borders, Inc	general support test	500.00	
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Once a grant request has been vetted and approved by staff, the status will update to **Approved**.

01/16/2025	Approved	Doctors Without Borders, Inc	g	10,000.00	
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Once a check has been created, the status will update to **Paid**.

12/12/2024	Paid	John Tuttle	test grant with multiple payments	50,000.00	
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Once the grant has been mailed, the status will update to **Complete**.

10/10/2024	Complete	John Tuttle	test grant for grantees	8,524.00	
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