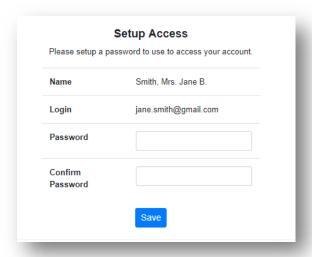# Donor Portal Guide

Donor Portal

As a fundholder of the Catholic Community Foundation, you have the ability to access your fund information online through our Donor Portal. Within the portal, you can easily check your fund balance, view and download quarterly market summaries, request and track grants, add to your fund and more. The Donor Portal makes it easy to manage your fund and is available 24/7 from anywhere, on any device.

Initial Login Process and Creating Your Account

You will receive an email from the Catholic Community Foundation with a custom invitation link to create your account in the Donor Portal. Your username will be your email address that we have on file. If you would like to change your username for any reason, please contact our team at 480.651.8808 or email tgreuel@ccfphx.org. Once you click on the invitation link in the email, you will be prompted to create a password of your choice. We recommend using random words, capital letters, numbers and/or special characters to keep your account secure.

Setup Access

Please setup a password to use to access your account.

Name	Smith, Mrs. Jane B.
Login	jane.smith@gmail.com
Password	
Confirm Password	

Save

Returning Users

To access the Donor Portal, visit the Catholic Community Foundation's website at www.ccfphx.org and click on "FundHolders" on the bottom navigation bar. You will be redirected to a login page where you will enter your unique username and password. If you forgot your credentials, please contact our team at 480.651.8808 or email tgreuel@ccfphx.org.
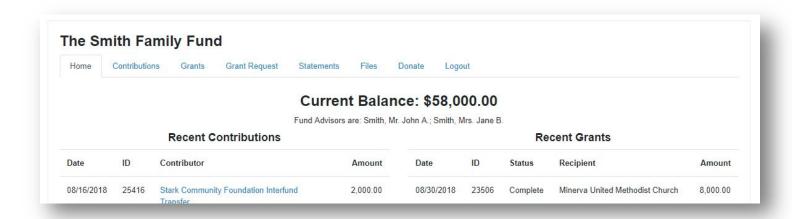
While our staff can assist you in resetting your password, please understand we do not have access to user passwords and cannot look them up for you.

Note: The Donor Portal will lock you out after five unsuccessful login attempts. If you are locked out, please contact our team at 480.651.8808 or email tgreuel@ccfphx.org.

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🔒 FundHolders   🔒 Grantees

Donor Portal Features

Once you are logged in, your fund's homepage will appear. If you manage multiple funds, you will see a Choose Fund menu. Choose the fund you wish to review from the drop-down menu.

The tabs at the top of the page display different features available to you as a fundholder:

Home
Your homepage is a quick snapshot of your fund's most recent activity. It will show your fund's current balance, all fund advisors, recent contributions and recent grant history.

Contributions
This tab shows all donations made to your fund. Clicking on a contributor's name will bring up their history of contributions including date of gift, type and amount.

Grants
This tab shows the history of grants awarded from your fund including date, organization name, purpose and amount.

Grant Request
This tab allows you to make a grant request from your fund and see recent grant statuses.

Statements
This tab shows your fund's quarterly market summaries. Next to the summary you wish to view, click Print and the system will generate a PDF in a new window that you may view, save or print.

Files
This tab will show any viewable files regarding your fund. At this time, fund agreements and other confidential documents are not available through the Donor Portal, but please contact our Advancement Team if you would like any documents added to your account.

Donate
This tab opens a new window for you to make a gift to your fund. You can also set up a recurring donation.

Logout
Clicking Logout will automatically log you out of the Donor Portal. If you do not log out this way, you will be automatically logged out at midnight.

Submitting a Grant Request

To recommend a grant from your fund, click the Grant Request tab. Recommending a grant is a three-step process:

1. Choose a Grantee in one of four ways:

    A. Choose from Previous Grantee
    Choose the organization you want to support from this drop-down list of organizations you have previously supported.

    or

    B. Other Foundation Funds
    Choose an endowment fund you want to support from this drop-down list of funds at Catholic Community Foundation.

    or

    C. Search for Other Grantees
    Search for the organization you want to support in GuideStar, the world's largest database of nonprofit organizations. Once you find the organization you want to support, click *Create Request*.

    or

    D. Enter Grantee Information Manually
    If you can't find the organization you wish to support, you will need to enter the organization's information manually: name, address and phone number. Once you enter this information, click *Submit*.
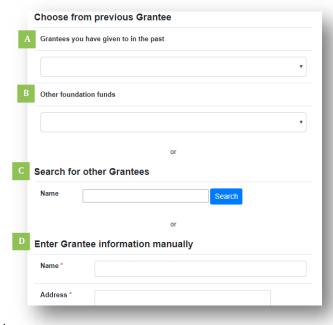
Once the organization has been selected, you will be redirected to a new page to provide pertinent grant details including grant description and amount.

2. **Grant Details**
    In the description field, please provide the grant purpose and any special handling. Keep in mind that if you don't designate a specific grant purpose, your grant will be earmarked for General Support. You can also choose to remain anonymous by selecting the Anonymous checkbox. Once you are finished entering this information, click *Review*.

3. **Review and Submit Request**
    Review your grant request details and click Submit Request. Once you submit the request, you will receive an automated confirmation email and our staff will begin processing.
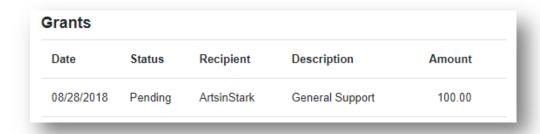
Viewing Grant History

To review your most recent grant history, click the **Grant Request** tab.

Under the Status column, you will see one of six statuses for each grant:

- **Request** means that your grant request has been sent to our staff. If you would like to cancel a pending grant request before it is processed, click the yellow Cancel button.

- **Cancelled** means your grant request has been cancelled.

- **Pending** means that our staff is currently processing your grant request.

- **Approved** means your grant request has been approved but not yet paid.

- **Paid** means that the grant request has been approved and a check has been paid out to the organization.

- **Completed** means the grant request has successfully been fulfilled.

Email Alerts

We will alert you via email every time a donation is made to your fund or a grant has been awarded from your fund. These alerts can be cancelled at any point, but the alerts are not retroactive, so you will not be notified of past grants or donations. If you would like to cancel these alerts, please contact our team at 480.651.8808 or email tgreuel@ccfphx.org.

Questions

If you have any questions about the Donor Portal, contact our team at 480.651.8808 or email tgreuel@ccfphx.org.

Donor Portal Frequently Asked Questions

How often are fund statements posted?
<u>Donor Advised Fund Holders</u> - Fund statements are posted on a monthly basis and will be available no later than the 15th of the following month. You will be notified via email when your summary is ready to be viewed in the Donor Portal. If you are not receiving these notification emails, please contact our team at 480.651.8808 or email tgreuel@ccfphx.org.

<u>Endowment & Agency Fund Holders</u> - Quarterly fund statements are posted the month immediately following the end of each quarter. You will be notified via email when your summary is ready to be viewed in the Donor Portal.

How do I change my password?
If you need to change your password, please contact our team at 480.651.8808 or email tgreuel@ccfphx.org. While our staff can assist you in resetting your password, please understand we do not have access to user passwords and cannot look them up for you. However, we'd be happy to reset it for you.

How long does it take for my recommendation to be processed?
Generally, recommendations are processed within five business days.

Who can I make recommendations to?
Grant recommendations must be made to 501(c)(3) organizations (including schools, churches and government entities). Grantee organizations will be vetted by the Foundation to ensure that they comply with Catholic values as set out by the USCCB.

Are there other ways to submit a donor recommendation?
Yes, recommendations may be submitted through email by emailing tgreuel@ccfphx.org. Please include the fund name, grant amount, grant purpose and any additional instruction in the email. A member of our team will email a confirmation of the recommendation.

How do I know if a grant I recommended has been issued?
Your most recent grants paid will be listed on your Donor Portal homepage. Or, you may click on the Grant Request tab and on the right side of this page, you will see your recent grant requests with their status.

Who do I contact if I'm having issues with the Donor Portal?
If you have any questions or are experiencing issues with the Donor Portal, please contact our team at 480.651.8808 or email tgreuel@ccfphx.org.

Are there any other changes I should be aware of?
Beginning April 1, 2019, all funds that receive credit card donations will have the fees recorded directly to their fund. The Foundation will no longer cover the associated fees due to the volume of credit card transactions received.