DONOR PORTAL USER GUIDE

Hutchinson **community** FOUNDATION

CHANGE MAKERS *at work*
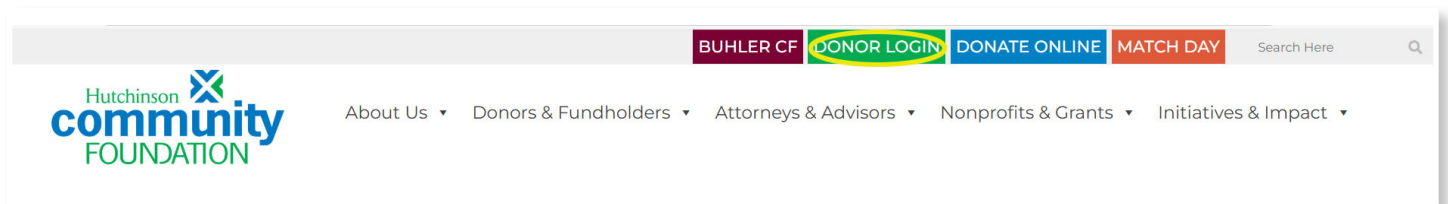
Donor Portal

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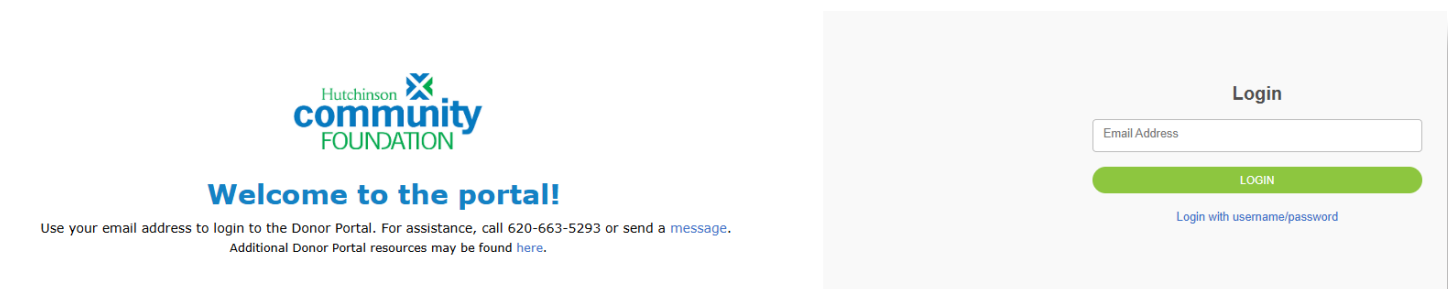
The Donor Portal makes it easy to manage your fund and is available 24/7 from anywhere on any device.

Accessing the Portal

Navigate to our website at hutchcf.org and select the green "Donor Login" button along the top right of the website. You may also access the portal login from the "Donor Portal" page under the "Donors & Fundholders" menu.

First-Time Users

You will login with your primary email and then authenticate with a PIN.

1. Enter your email address.

2. Check your email for your verification PIN (**Note:** This code expires after 3 minutes).

3. Enter the code into the "Pin" field.
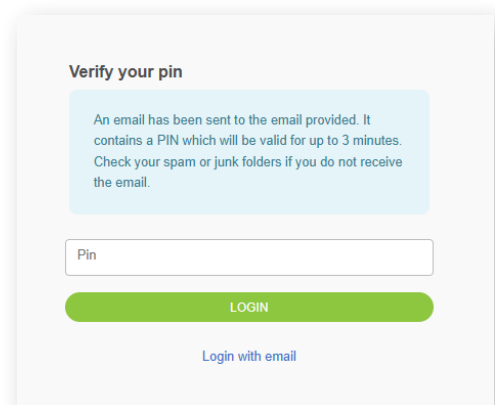
You can choose to use your email and receive a PIN to log in every time to the system or set up a username and password. These options will remain on the initial login page.
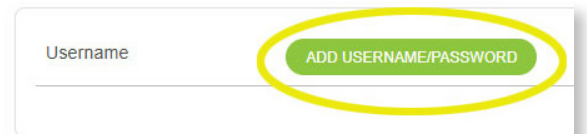
Setting Up a Username and Password
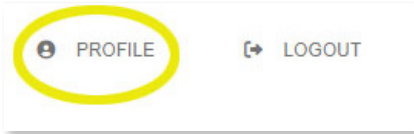
1. Navigate to the Profile icon on the top right-hand side of the portal. Click on "Profile."

**2.** Select "Security" on the left-hand side of the screen.

3. Click on the green "Add Username/Password" button. Enter your information in the fields. (We recommend using your primary email address as your username.)

Returning Users

You may select "Login with username/password" on this page to log in with your current credentials. You may be prompted to create a new password depending on how strong your password is.

Note: The Hutch CF team cannot access your password. If you forget your password, you can reset it on the Donor Portal login page by clicking on the "Forgot Your Password?" link.
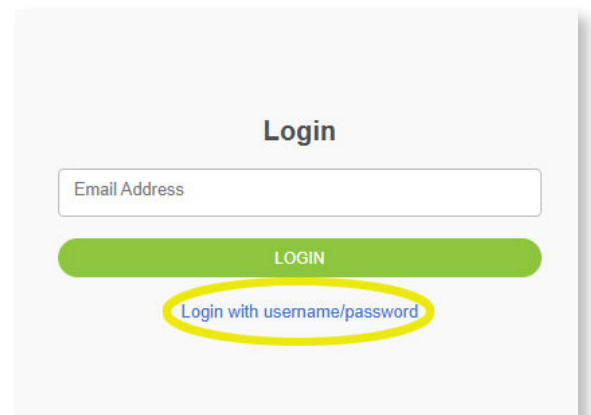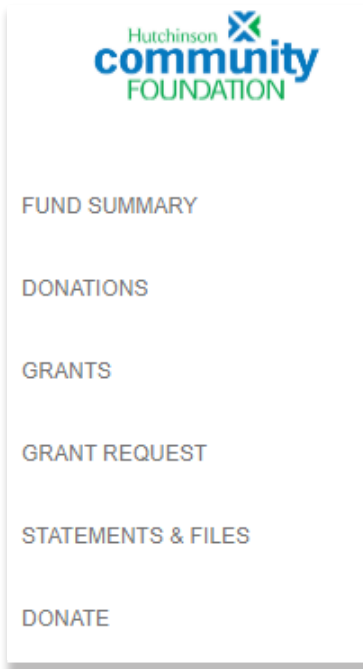
Individuals Who Advise Multiple Funds

If you advise multiple funds, you will see all the funds you advise listed on the homepage of the portal. Choose the fund you wish to view.

Donor Portal Features

FUND SUMMARY

DONATIONS

GRANTS

GRANT REQUEST

STATEMENTS & FILES

DONATE

The tabs at the left side of the page display features available to you as a fund advisor:

Fund Summary – This page provides a snapshot of your fund.

Donations – Unless the donor has requested to remain anonymous, this tab shows all contributions/donations made into the fund. You will note that an "Export" option appears on the far-right side of the page. This feature will export information about each donation into a Microsoft Excel spreadsheet. Clicking on a contributor's name will bring up the person's contribution history, including date of gift, type and amount, as well as contact information.

Grants – Shows the history of grants awarded from your fund, including date, organization name, purpose and amount. The top menu provides three options to learn more about the grants from the fund:

Grant Summary – Lists total cumulative grants by grantee.

Grant History – Lists each grant made from the fund, from most recent to oldest.

Copying a grant – Fundholders can make copies of previous grants by selecting the green "Copy" button. This will create a new grant request with the same details as the previous grant recommendation.

Status – 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 team.

If you would like to cancel a pending grant request before it is processed, click the yellow Cancel button.

Canceled means your grant request has been canceled.

Pending means our team is currently processing your grant request.

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

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

Completed means the grant request has been successfully fulfilled.

Recurring Grants – Lists any recurring grants associated with the fund. By selecting the individual recurring grant, the option to edit the recurring grant will appear on the right side.

Grant Request – Allows you to make a grant request from your fund and see recent grant statuses, if applicable.

Statements & Files – Shows your fund statements from 2023 onward and any viewable files regarding your fund, as well as Donor Updates and this user guide.

Give To A Fund – Opens a new window for you to contribute to your fund or other funds managed at the Community Foundation.
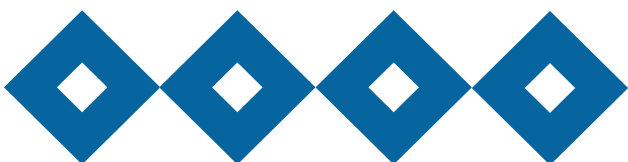
Creating a Grant Request

To recommend a grant from your fund, click the green Create Grant Request button located on the upper right side of any page within your portal.
Select from the following three options to make your request:
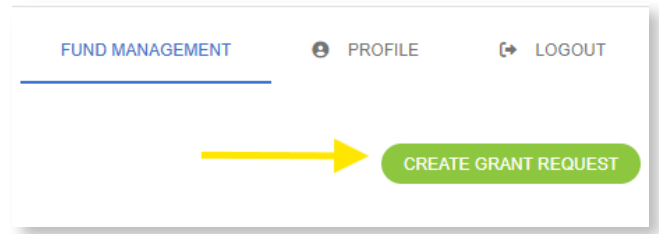
> **Previous Grantee** – Choose the organization you want to support from this drop-down list of organizations or funds you have previously supported.

> **Search Grantees** – Search for a grantee based on name, address or EIN. The system will search the foundation's database and Candid for organizations containing the keywords you enter. Candid is a service that provides information about U.S. nonprofit organizations. The more keywords used, the better the search results. Results will be displayed from the foundation's database and Candid. **Note:** The use of Candid does not automatically guarantee an organization will pass the foundation's due diligence. That procedure will take place during processing.

> **Enter Manually** – If you can't find the organization you wish to support, you may enter the organization's information manually: organization name, address and phone number. Providing all the requested information allows us to ensure your grant recommendation is processed as accurately and efficiently as possible.

Grant Details

Once you have selected a grantee, complete the form, being sure to fill in the description field with the grant purpose and any special handling. Keep in mind that if you don't designate a specific grant purpose, your grant will be designated for unrestricted use.

A $50 minimum is required for each grant request. You can also choose to remain anonymous by selecting the "Anonymous" checkbox.

Add to Cart

When you have completed the Grant Request form, select the green "Add to Cart" button. You will then receive an automated confirmation email, and our team will begin processing the request.

Email Notifications

We will alert you via email every time a contribution is made to your fund or a grant has been awarded from your fund. These alerts may be canceled at any time by contacting us.

Frequently Asked Questions

How often are fund statements posted?
Fund statements are posted monthly. You will be notified via email when your statement is ready to be viewed in the Donor Portal. If you are not receiving these notification emails, please contact us.

I've lost my password. What should I do?
You can reset your password on the Donor Portal login page by clicking on the "Forgot Your Password?" link.

Questions?
Please contact us at 620-663-5293 or email donorservices@hutchcf.org.