Fund Advisor Portal Guide

Fund Advisor Portal

As a fund holder of the Catholic Community Foundation, you have the ability to access your fund information online through our Fund Advisor Portal. Within the portal, you can easily check your fund balance, view and download quarterly fund statements, request and track grants, add to your fund and more. The 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 Fund Advisor 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 858.397.9700 or email info@ccfsd.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.


Returning Users

To access the Portal, visit the Catholic Community Foundation's website at www.ccfsd.org and click on the gold "Fund Advisor Login" button at the top right corner of the home page . You will be redirected to a login page where you will enter your unique username and password. If you forgot your password, please use the "forgot password" link on the login site.

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 Fund Advisor Portal will lock you out after five unsuccessful login attempts. If you are locked out, please contact our team at 858.397.9700 or email info@ccfsd.org.
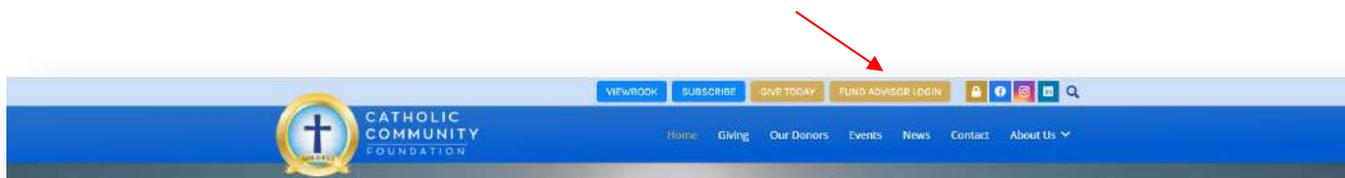
Fund Advisor Portal Features

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 menu.

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

Home
Your homepage provides a quick snapshot of your fund. It will show your fund's current balance, all fund advisors, contributions and 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. This tab also summarizes your grant history by grantee.

Grant Request (may not be available for some parish and school funds)
This tab allows you to make a grant request from your fund and see recent grant statuses. Further below we provide detailed instructions on this process.

Grant Catalog
This tab displays various granting opportunities in our community.

Statements
This tab shows your fund's quarterly fund statements. Next to the statement you wish to view, click View 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 Fund Advisor Portal, but please contact us 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 (or other funds held by CCFSD). You can also set up a recurring donation.

Logout
Clicking Logout will automatically log you out of the 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 a 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. Search results will first search our database. If not found there, you can choose to search 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 can enter the organization's information manually. 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.

Grants

Date	Status	Recipient	Description	Amount
08/28/2018	Pending	ArtsinStark	General Support	100.00

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 grant has been awarded from your fund. If you would like to cancel these alerts, please contact our team at info@ccfsd.org.

Questions

We are always here to help! If you have any questions about the Fund Advisor Portal, contact our team at 858.397.9700, or email info@ccfsd.org.

Frequently Asked Questions

How do I change my password?
If you need to change your password, please visit the login page and click the "forgot password" link. The system will walk you through the rest. If you continue to have difficulties, please contact our team at 858.397.9700, or email info@ccfsd.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 often are fund statements posted?
Fund statements are posted on a quarterly basis and will be available approximately the 20th of the following month. 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 our team at 858.397.9700, or email info@ccfsd.org.

Why can't I see my historic fund statements or gift receipts?
Fund statements and gift receipts generated prior to June 2022 were unable to migrate to this new system. Please contact us if you need access to these and we would be more than happy to send them to you.

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

Can I setup recurring grants?
Yes, in the grant request process you will find a check box titled "Recurring". If you select that box, the system will ask you a series of questions to setup the recurring grant details.

Are there other ways to submit a grant recommendation?
Yes, grant recommendations may also be submitted through email. Please email info@ccfsd.org with your grant recommendation. Please include the fund name, grant amount, grant purpose, and any additional instructions. A member of our team will respond with 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 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.

When I click the "Donate" tab, my fund shows up as an option. My fund is a private family fund (i.e. DAF or other), why is this showing up?
Please rest assured that we have set your family funds to "private" and will not show up on the public donation portal. However, the system will allow you, the fund advisor, to donate to your own fund through the system if you so choose.

Who do I contact if I'm having issues with the Fund Advisor Portal?
Our team is always here to help. If you have any questions or are experiencing issues with the Portal, please contact our team at 858.397.9700, and or email info@ccfsd.org.