The Community Foundation
HARRISONBURG-ROCKINGHAM

FUND PORTAL

Quick Reference User Guide

Welcome to The Community Foundation of Harrisonburg & Rockingham County's (TCFHR) Fund Portal. You have 24/7 access to this easy-to-use, secure portal where you can view donation and grant history, access fund statements and more. Our new portal is mobile-friendly, so you can easily access it on any device.

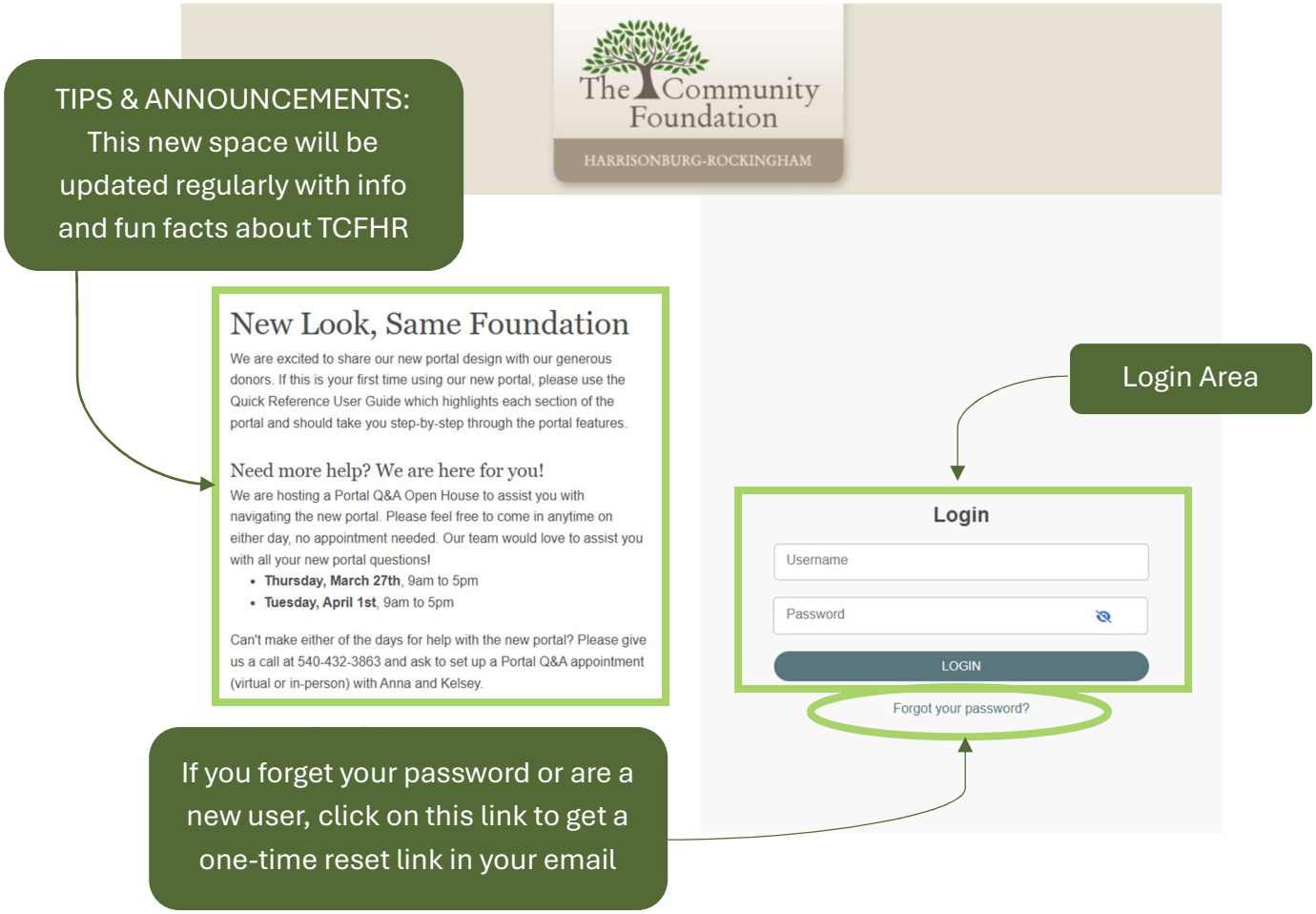
For our Donor Advised Fundholders, the portal is your tool to make grant recommendations and monitor the status of submitted grant recommendations. You also can use your donor advised fund to learn about some of TCFHR community initiatives and programs and make grants directly to the program's matching and other fundraising campaigns.

If you have any questions or difficulties accessing the fund portal or a specific section of the portal, please do not hesitate to reach out to our team at any time. Our phone number is 540-432-FUND (3863).

TABLE OF CONTENTS

HOW TO LOG IN TO THE PORTAL

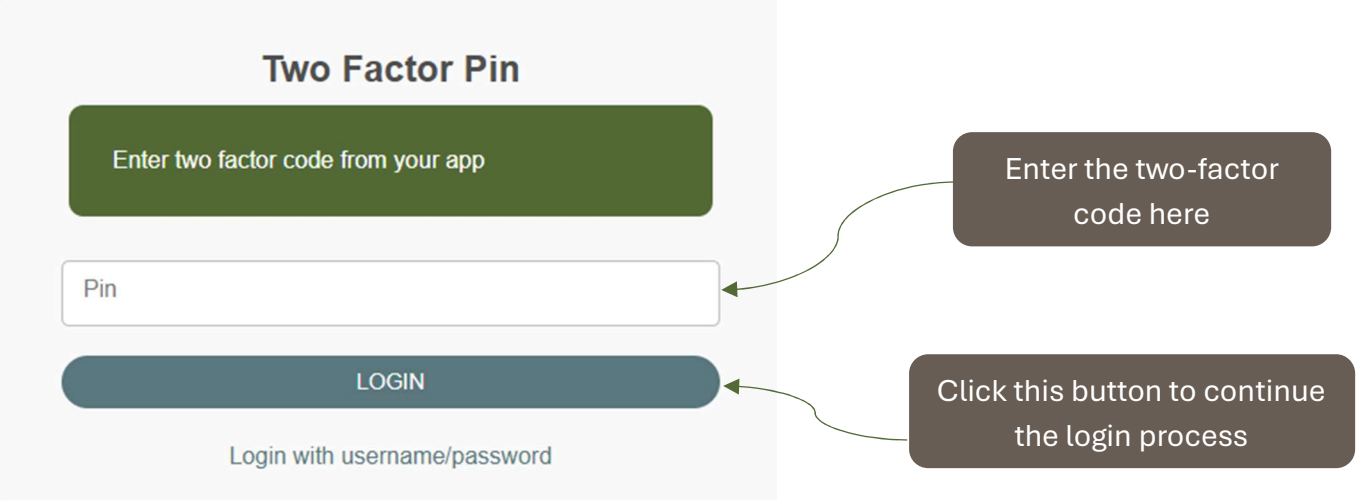
To access the fund portal, go to **www.tcfhr.org** and click on the green Fundholder Login button in the top right corner. Here's a visual overview of the new login page:



EXISTING FUNDHOLDERS

You can log in with the same email address and password combination that you've been using on the old portal. Simply enter your email address in the "Username" field and your password in the "Password" field and click the "Login" button.

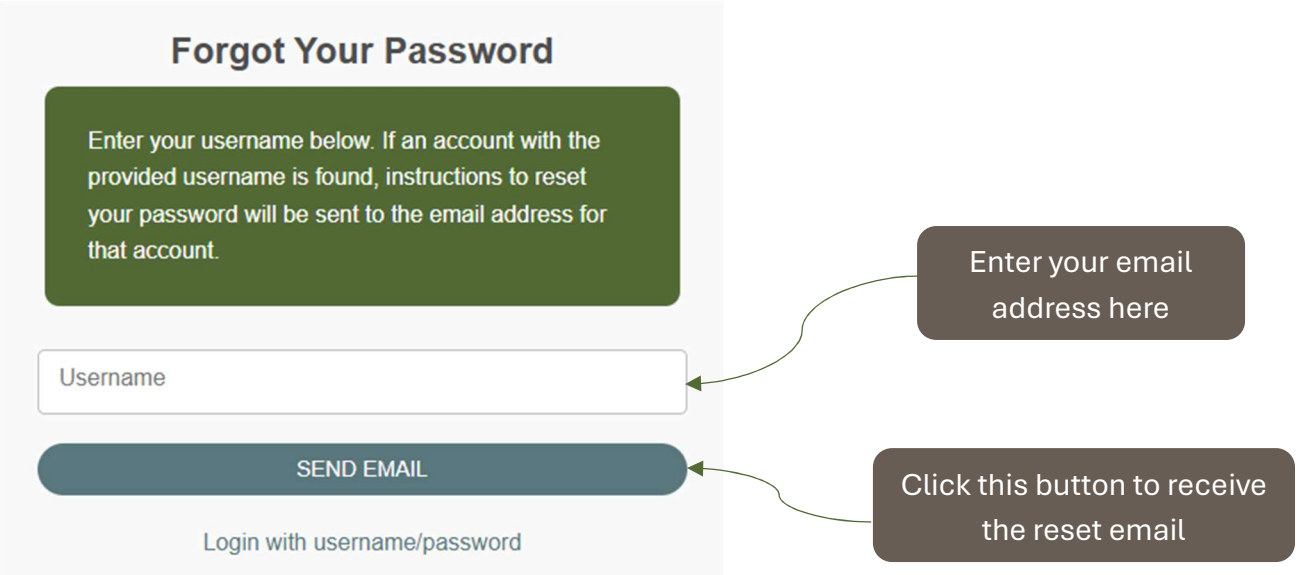
If you have two factor authentication enabled, you will be prompted to enter the two-factor code from an authenticator app on your mobile device or other authenticator on the next screen to complete the login process. To set up two-factor authentication, please see the **Enabling Two Factor Authentication** section.



If you've forgotten your password, simply click the "Forgot your password?" link below the "Login" button to obtain a one-time use password reset link in your email. TCFHR staff cannot access your password.

NEW FUNDHOLDERS OR FIRST-TIME PORTAL USERS

If you've never logged in to our current or previous fund portal, this is the section for you! Please click "Forgot your password?" below the login button. Enter your email address which you provided to us in the "Username" field and click the "Send Email" button to obtain a one-time-use password reset link in your email. Please use the link you received in your email to set your password.



ENABLING TWO FACTOR AUTHENTICATION

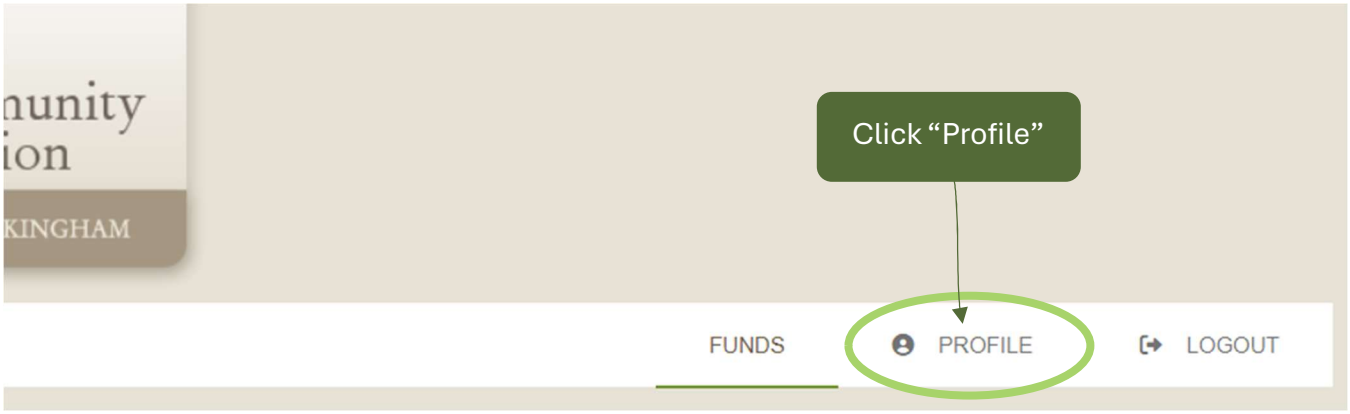
Once you are logged in to your portal, you can now enable two-factor authentication.

WHY SHOULD YOU ENABLE TWO-FACTOR AUTHENTICATION?

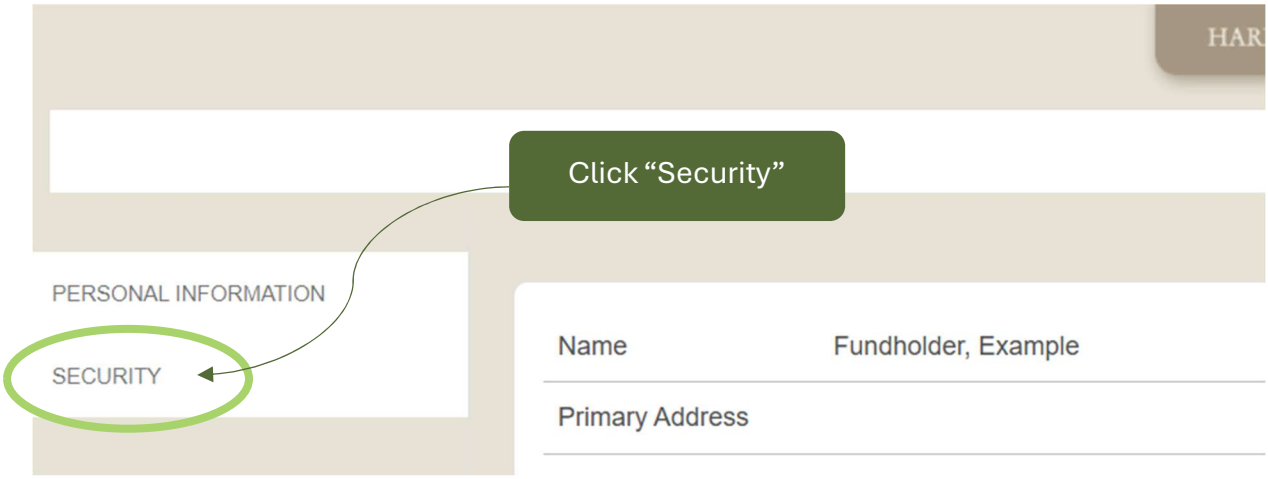
Two-factor authentication helps prevent unauthorized access to your account. If someone obtained your password, they also would have to have access to your cell phone or other authentication method. Two-factor authentication adds an extra layer of protection for your fundholder portal and makes it more difficult for unauthorized transactions or access to occur. We are excited to offer this authentication tool to protect our donors' confidentiality and improve security.

HOW TO ENABLE TWO-FACTOR AUTHENTICATION

Once you have logged in to the portal, navigate to the "Profile" button on the upper right corner of the white toolbar:



Next, click on "Security" on the left-hand side of your screen:



Next, click the green “Enable” button on the right side of “2-Step Verification”.

Select your verification method from the options provided and click “Next”. Follow the instructions to set up the two-factor authentication. We recommend using an authenticator app as it provides the greatest security compared to the other options.

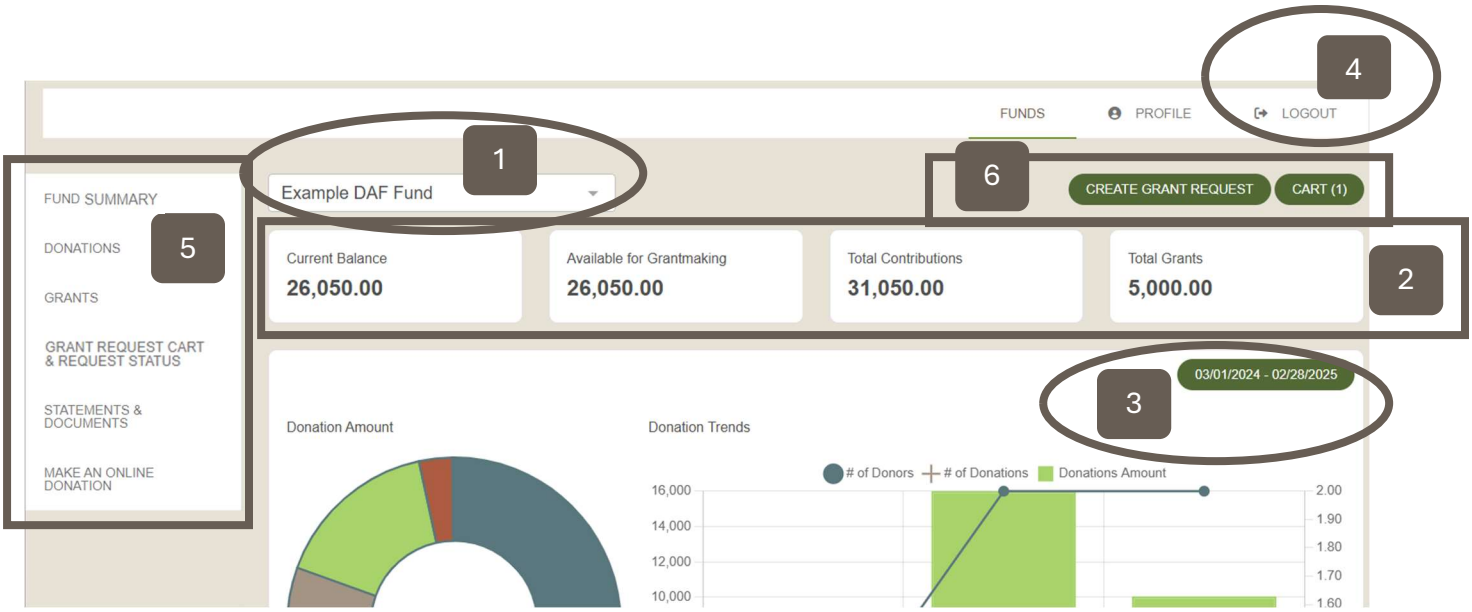
EXPLORING THE FUND SUMMARY

Once you are logged in, you will see one of two formats. If you have more than one fund you will see a list of funds to select from as seen below. Click the “Select” button under the fund name you would like to view.

If you only have one fund, you will immediately be directed to your fund summary.

The next screenshot is a visual overview of an example fund summary. Please note, the summary you see may vary depending on the type of fund.

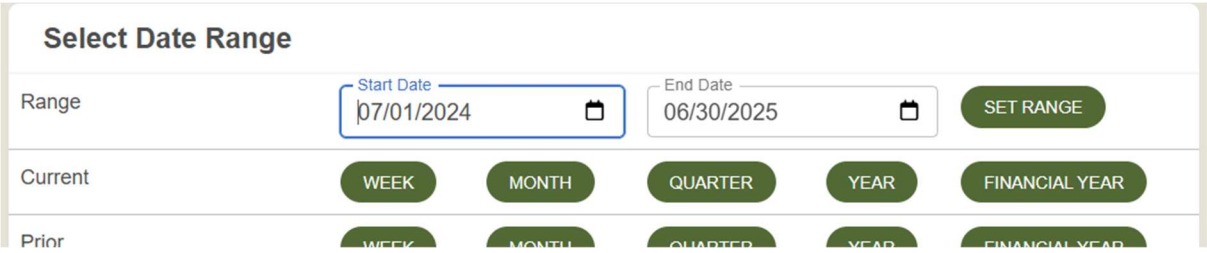
This guide will list the options available for all funds, but your fund portal may not include all the features presented depending on the type of fund.



1 – You can navigate between funds by clicking on the dropdown menu and selecting the fund name that you wish to view.

2 – This area is a quick snapshot of the current fund balance, amount available for grant making, total contributions and total grants. The current fund balance is not final and may vary based on fund activity. If you have a Forever Fund (endowment), the amount listed in "Available for Grantmaking" is the balance remaining from the annual endowment distribution that has not yet been distributed or awarded.

3 – This button controls the dashboard on the home screen. You can adjust the date range by clicking on the green button and either entering a date range or selecting from the pre-set date options on the screen. To enter a date range, either type or select from the calendar drop down, and then click "Set Range" to update the dashboard. To use a pre-set date option, click on the green button you wish to view.



4 – Click on "Logout" to end your session.

5 – Please see the **How to Navigate the Fund Portal** section of this guide.

6 – Please see the **How to Recommend a Grant** section of this guide (applicable for donor advised funds and nonprofit agency funds)

HOW TO NAVIGATE THE FUND PORTAL

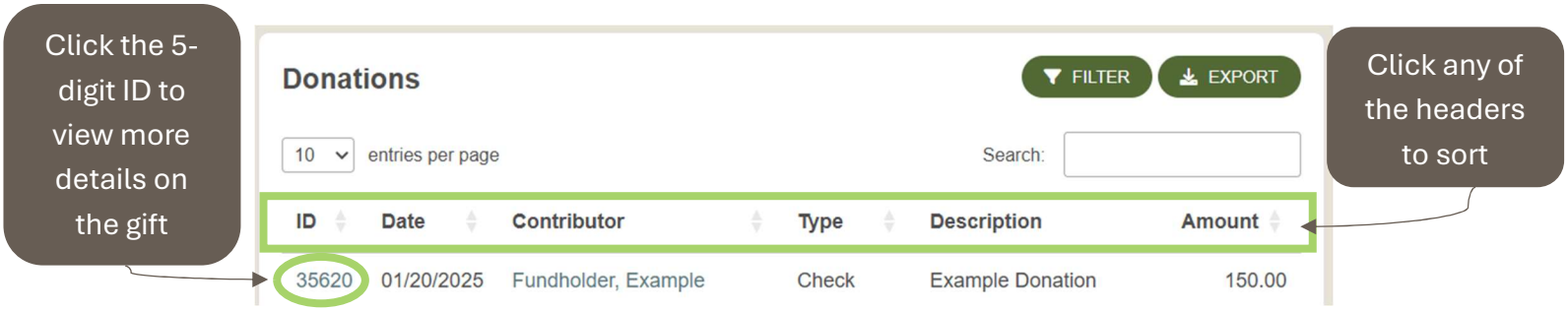
The menu on the left side of the page helps you navigate between the different fund sections. The menu options you see will vary based on the type of fund.

FUND SUMMARY

This page is a quick snapshot of your fund's most recent activity. For more information, please see the **Exploring the Fund Summary** section of this guide.

DONATIONS

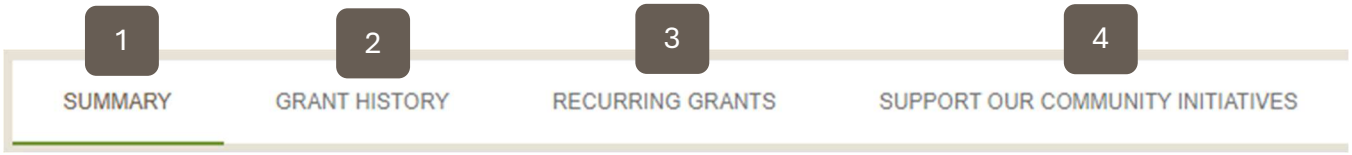
This tab shows all contributions/donations to the fund. You can search for donations using the search box on the right. The results may be filtered by date by clicking the green "Filter" button. The list can be sorted by clicking on the various headers.



You may view the details of a donation by clicking on the 5-digit ID number on the left side of the table. You may view the history of a donor's gifts to the fund, including the date and dollar amount, by clicking on their name.

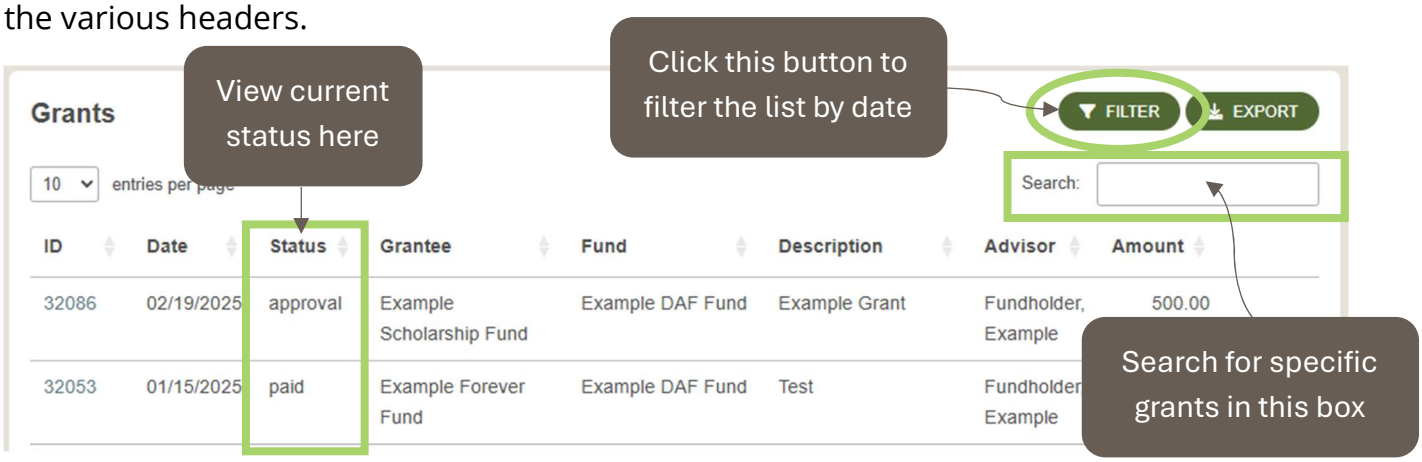
GRANTS

This section has several sub-sections to give you the most flexibility in viewing information. The tab name underlined in green is the current tab you are viewing.



1 – The first section displayed after clicking "Grants" is the Summary page. The Summary page lists the Grantees or TCFHR Funds you've donated to in the past. The number of grants sent to each grantee is visible on the right. You can click on the Grantee name to drill down into the list of grants sent to the Grantee. Just like the donations section above, you are able to search for a grantee and sort by clicking on the headers.

2 – This tab provides a detailed listing of all grants sent from the fund and their current status. You can search for grants using the search box on the right. The results may be filtered by date by clicking the green "Filter" button. You also can sort the list by clicking on the various headers.



3 – Recurring grants from your fund may be viewed in this tab. The list can be filtered and sorted, just like grants and donations. The table shows the interval between grants, and if a specific number of recurring grants is specified, the remaining dollar value needed to fulfill the recurring grant. If you would like to modify or cancel a recurring grant, please contact the TCFHR staff, and we would be glad to assist you.

4 – If you have a donor advised fund, you may directly support our community initiatives and make grants towards matching challenges. Please see the **View and Donate to Community Initiatives and Matching Gift Challenges** section of this guide for more information. If you don't have a donor advised fund, you may view and donate to the matching challenges and community initiatives on the online giving hub on our website.

GRANT REQUEST CART & REQUEST STATUS

This tab displays unsubmitted grant requests and lists the status of recent grant requests. It also includes instructions on how to recommend a grant and how to submit recommendations. Please see the **How to Recommend a Grant** section of this guide for more information.

SCHOLARSHIP STATUS

This tab allows you to see a list of scholarship awards and the status of scholarship payments from the fund. Please see the **How to View Scholarship Status** section of this guide for more information.

STATEMENTS & DOCUMENTS

This tab is where you will find your quarterly fund statements. The list of quarterly fund statements can be sorted by date and searched using the search box on the right of the screen.

MAKE AN ONLINE DONATION

This tab will re-direct you to our online giving page where you may contribute online with a credit card to your fund or other funds administered by TCFHR.

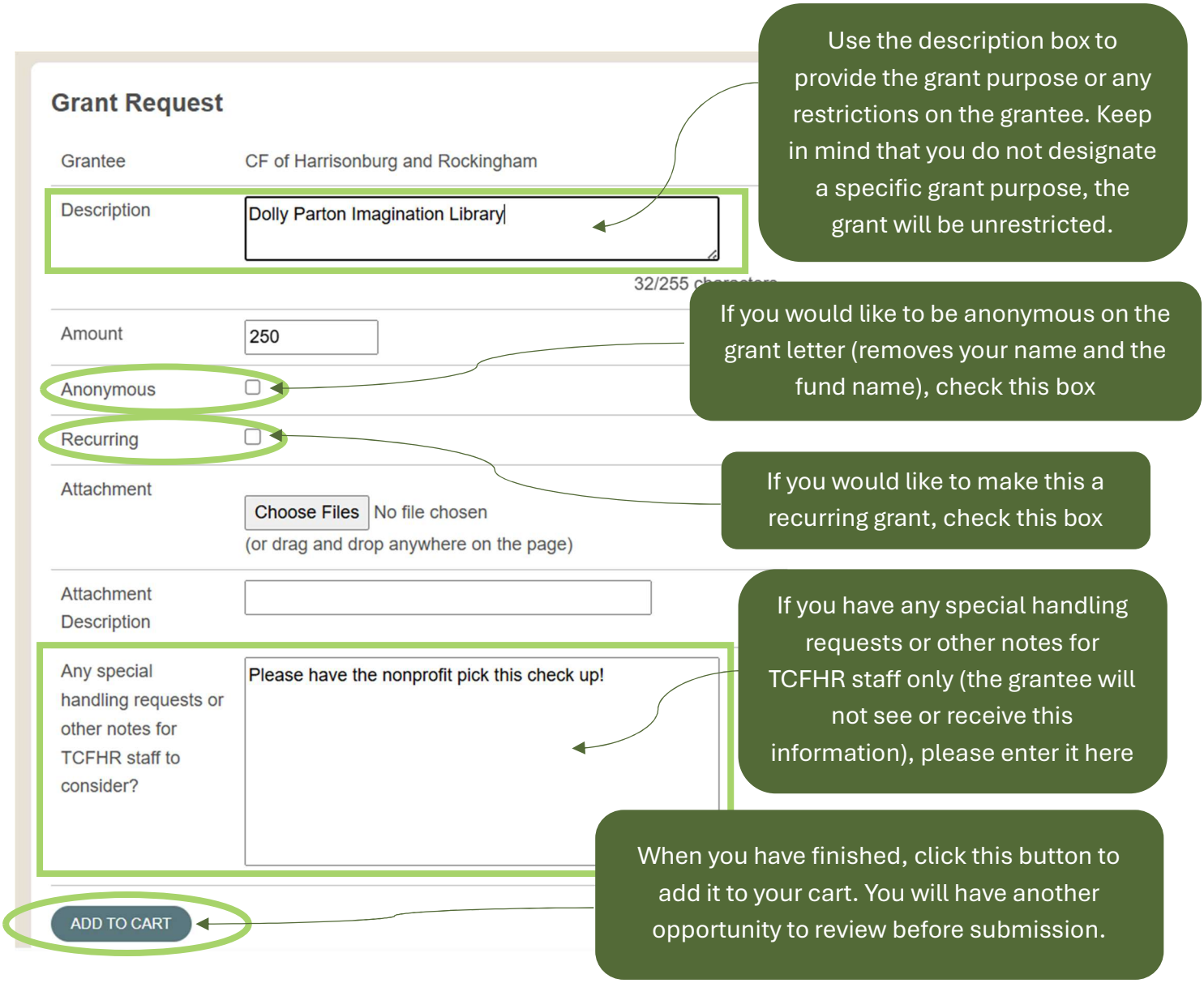
HOW TO RECOMMEND A GRANT

To recommend a grant from your fund, click the green “Create Grant Request” button on the upper right side of any page in the portal. There are three options to start a recommendation (also referred to as a request within the portal system):

- Select "Previous Grantee" if you've made a grant to an organization before or would like to donate to a fund at TCFHR
- Select "Search Grantee" if you would like to search our database of past grantees or Candid/Guidestar's database of nonprofit organizations.
- Select "Manual Grantee" if your grantee is not listed in the other two options (common examples are churches and government entities)

You also can copy past grant recommendations to external grantees by going to “Grants” and then clicking on “Grant History”. You will see a “Copy” button on the right of the grant listing.

Once you have selected the grant recipient, you can add information to the grant recommendation as shown below:



In the description field, please provide the grant purpose or any restrictions on the grantee. If you do not designate a specific grant purpose, your grant will be unrestricted.

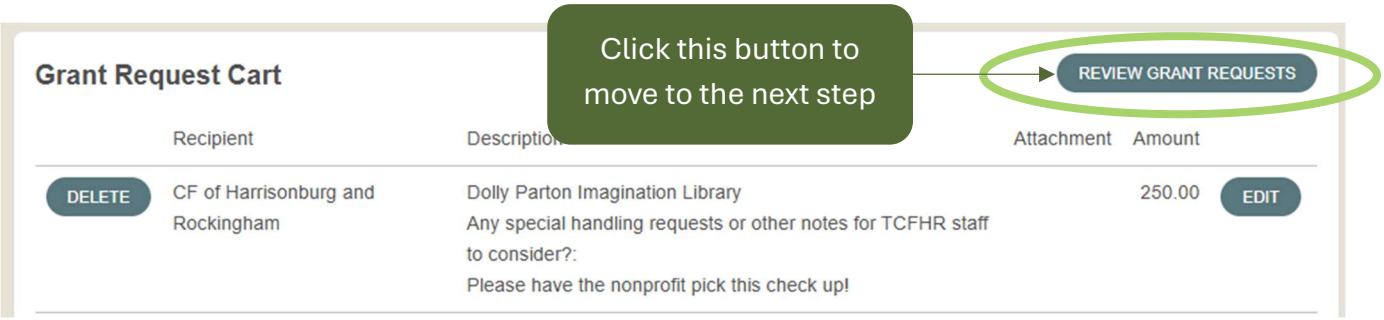
If you prefer to remain anonymous and receive no recognition on the grant letter, check the “Anonymous” box. This will remove your name as the advisor and the fund name.

If you would like this grant to be automatically paid on a regular schedule, check the “Recurring” checkbox. You will be prompted to choose further options, such as recurring interval and number of repeating grants.

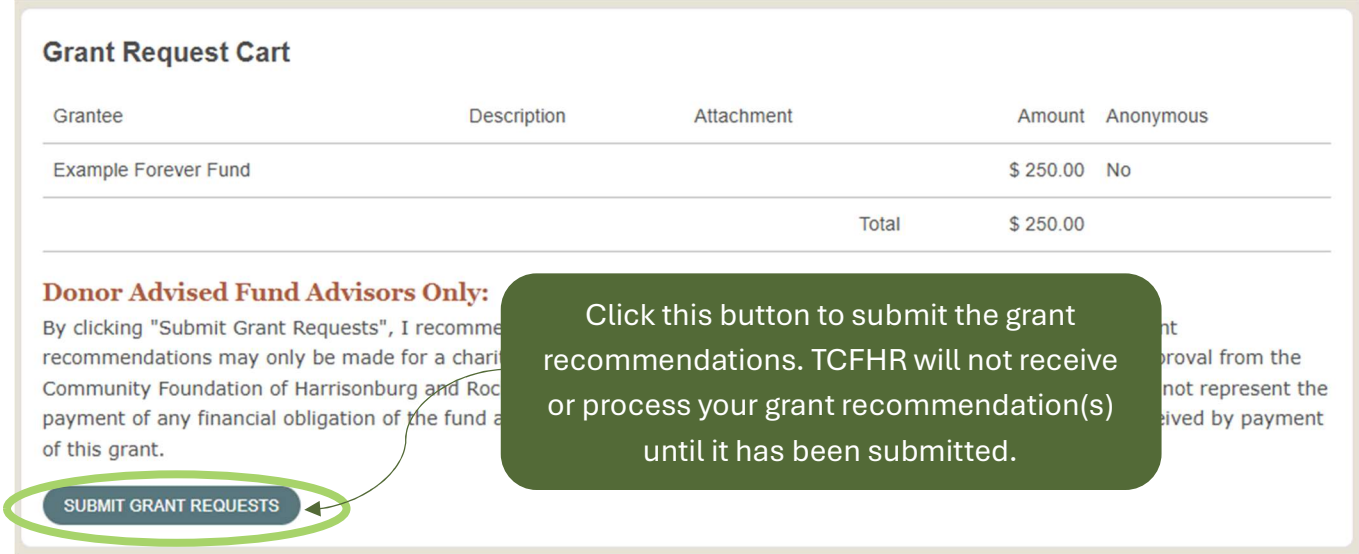
The final field is a space for any additional notes or special handling requests related to the grant for the TCFHR team to review. The grantee will not see this information.

When you have finished, click “Add to Cart”.

After clicking “Add to Cart”, you will be brought to your Grant Request Cart. This can also be accessed by clicking the “Cart” button next to the “Create Grant Request” button. You can delete or edit your grant recommendations from this page using the teal buttons. When you are ready to submit your grant recommendations, click “Review Grant Requests”.



The next page allows you to review all recommendations before submitting them to TCFHR’s due diligence process. TCFHR will not process un-submitted grant recommendations. When satisfied, click “Submit Grant Requests”.



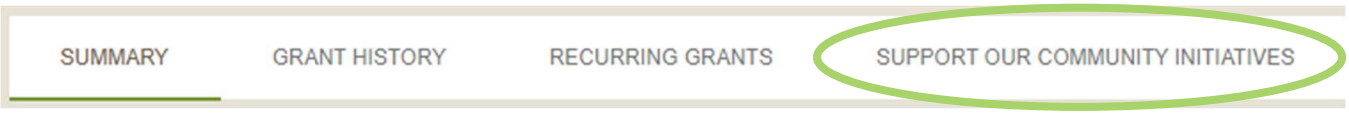
You will see a confirmation once the grant recommendation has been submitted.

If you would like to cancel a grant recommendation after it has been submitted, you may cancel if it is in the “Request” status. Simply click the “Cancel” button next to the grant you wish to cancel on the “Grant Request Cart & Request Status” page.

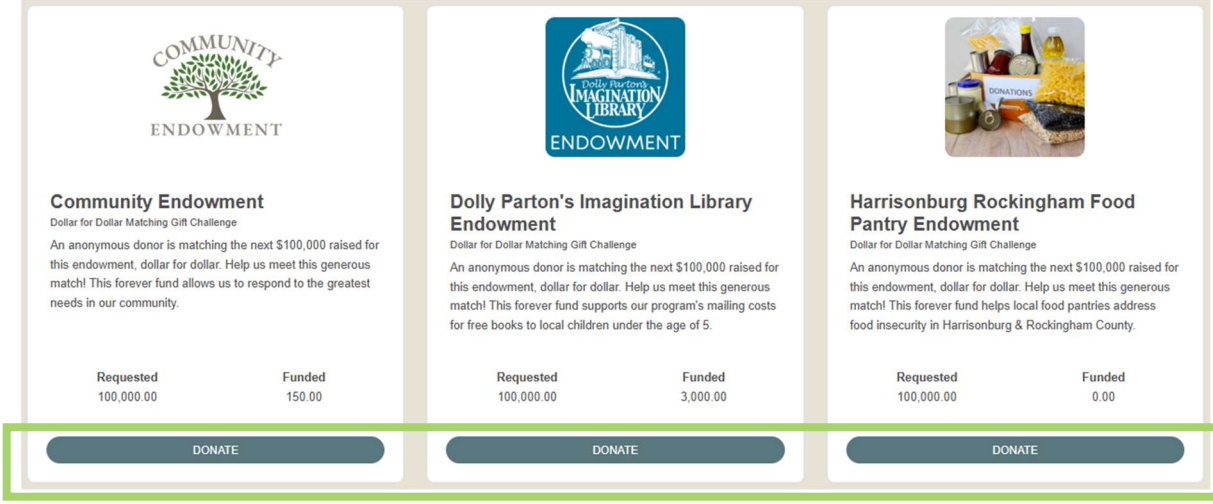
VIEW AND DONATE TO COMMUNITY INITIATIVES AND MATCHING GIFT CHALLENGES

(Donor Advised Funds Only)

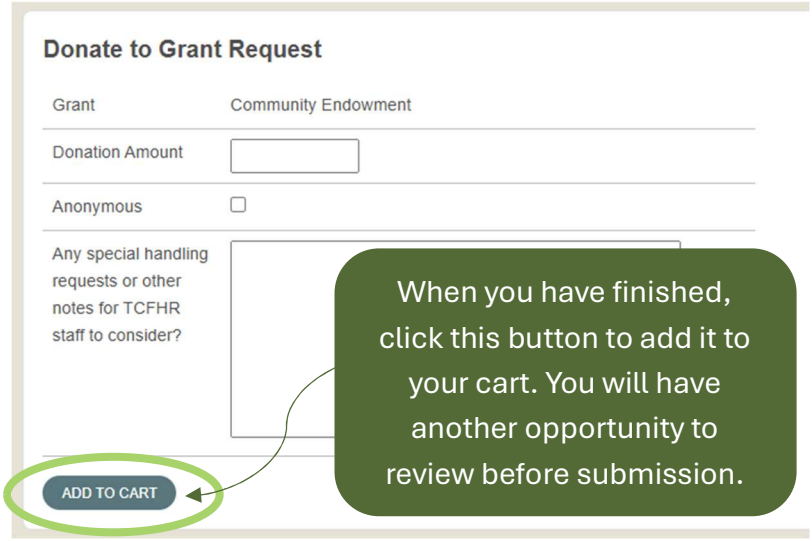
Click on "Grants" on the left navigation, and then click "Support Our Community Initiatives"



You can view open Community Initiatives and Matching Gift Challenges on this page.



If you would like to support one of our initiatives with a grant from your donor advised fund, simply click "Donate" under the fund you would like to support.



You can enter the amount you would like to give and then click "Add to Cart". This will create a grant recommendation that is processed just like any other grant recommendation request as outlined in the **How to Recommend a Grant** section of this guide.

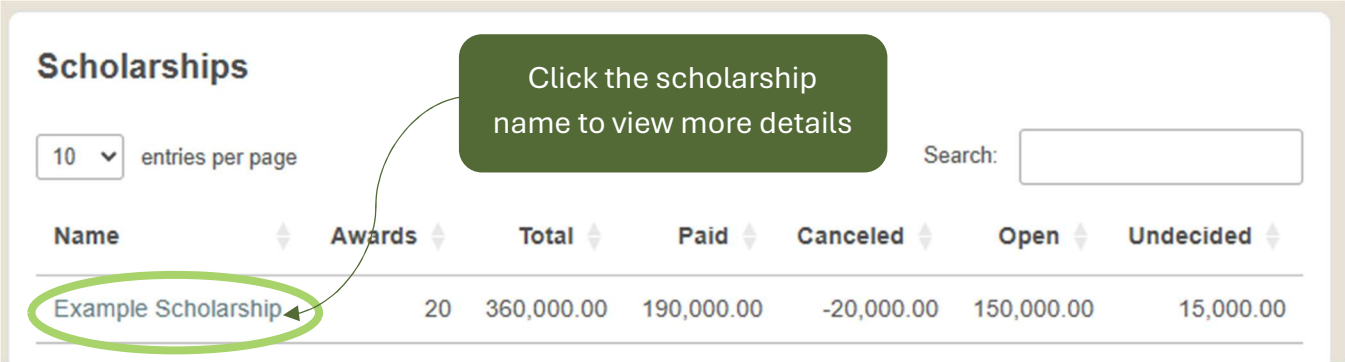
Not a donor advised fundholder but want to participate in matching gifts or community initiatives? Visit our website and click "Give Now" or go to this link to take you to our current opportunities.

HOW TO VIEW SCHOLARSHIP STATUS

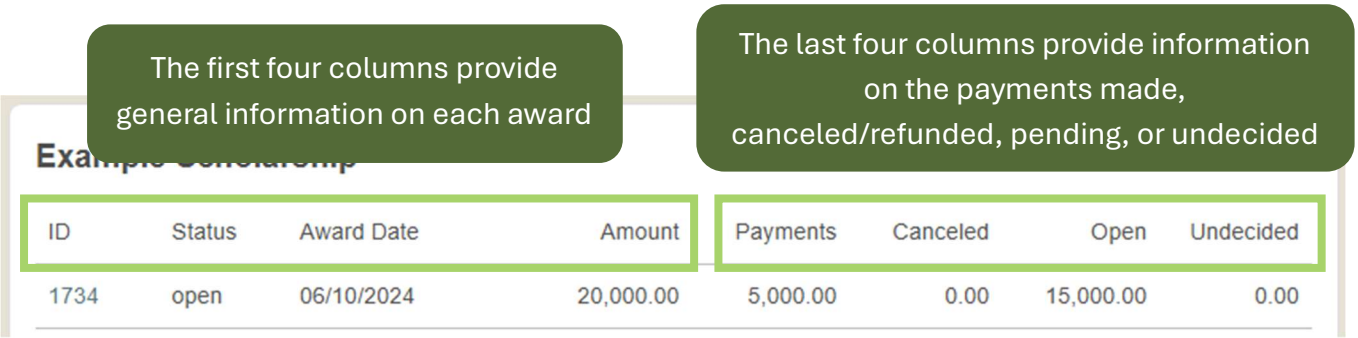
(Scholarship Funds Only)

Click on “Scholarship Status” on the left navigation.

This page provides summarized information about the scholarship. Click on the Scholarship name to view additional details.



The additional details provide information on each individual award. The table shows the current status, award date, award amount. The last four columns (Payments, Canceled, Open, Undecided) show the amounts that have been sent to the school, are pending payment in future years, or have been canceled.



You may click on the Scholarship ID to view information on the recipient school and specific payment dates.