



Jewish Community Foundation
of Central Pennsylvania

Donor Portal Guide

Name:

Username:

Password:

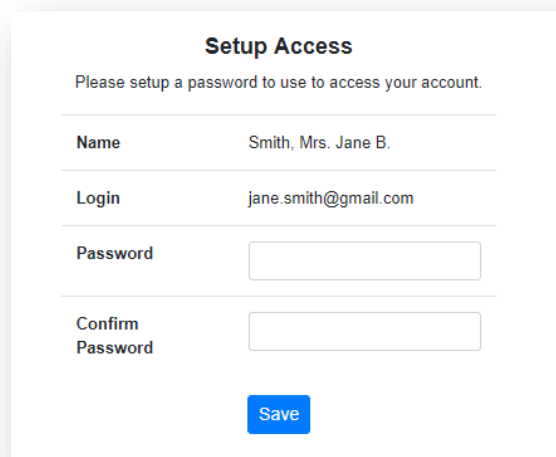
Donor Portal Guide

Donor Portal

As a fundholder of Jewish Community Foundation of Central PA, 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 fund statements, request and track grants, add to your fund and more. The Donor Portal makes it easy to manage your funds and is available 24/7 from anywhere, on any device.

Initial Login Process and Creating Your Account

You will receive an email from Jewish Community Foundation of Central PA 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 info@pajewishendowment.org or 717-409-8220. 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	<input type="password"/>
Confirm Password	<input type="password"/>

[Save](#)

Returning Users

To access the Donor Portal, visit Jewish Community Foundation of Central PA's website at www.pajewishendowment.org and click Donor Login on the side 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 info@pajewishendowment.org or 717-409-8220. 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 info@pajewishendowment.org or 717-409-8220.



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 screenshot shows the Donor Portal for 'The Smith Family Fund'. At the top, there is a navigation bar with tabs: Home, Contributions, Grants, Grant Request, Statements, Files, Donate, and Logout. Below the navigation bar, the current balance is displayed as '\$58,000.00'. Underneath the balance, it lists 'Fund Advisors are: Smith, Mr. John A.; Smith, Mrs. Jane B.'. The page is divided into two main sections: 'Recent Contributions' and 'Recent Grants'. Each section contains a table with columns for Date, ID, Contributor/Status, Recipient, and Amount.

Recent Contributions				Recent Grants				
Date	ID	Contributor	Amount	Date	ID	Status	Recipient	Amount
08/16/2018	25416	Stark Community Foundation Interfund Transfer	2,000.00	08/30/2018	23506	Complete	Minerva United Methodist Church	8,000.00

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 up 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 Jewish Community Foundation of Central PA.

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**.

The screenshot shows a form titled "Choose from previous Grantee" with four options: A. Grantees you have given to in the past (a dropdown menu), B. Other foundation funds (a dropdown menu), C. Search for other Grantees (a search bar with a "Search" button), and D. Enter Grantee information manually (fields for Name and Address).

Once the organization has been selected, you will be redirected to a new page for you 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 as undesignated. You can also choose to remain anonymous by selecting the Anonymous checkbox. Once you are finished entering this information, click **Review**.

The screenshot shows a form titled "New Grant Request" with the following fields: Grantee (Adaptive Sports Program of Ohio), Description (General Support), Amount (100.00), and Anonymous (checkbox). A "Review" button is at the bottom.

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.

The screenshot shows a form titled "Review New Grant Request" with the following fields: Grantee (Adaptive Sports Program of Ohio), Description (General Support), Amount (\$ 100.00), and Anonymous (No). Buttons for "Submit Request" and "Edit Request" are at the bottom.

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 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 info@pajewishendowment.org or 717-409-8220.

Questions

If you have any questions about the Donor Portal, contact info@pajewishendowment.org or 717-409-8220.

Donor Portal Frequently Asked Questions

How often are quarterly fund statements posted?

Quarterly fund statements are usually posted within two months following the end of each quarter. 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 info@pajewishendowment.org or 717-409-8220.

How do I change my password?

If you need to change your password, please contact info@pajewishendowment.org or 717-409-8220. 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; grant payments are issued around the 1st and 15th of each month.

Who can I make recommendations to?

Grant recommendations must be made to 501(c)(3) organizations (including schools, churches and government entities).

Are there other ways to submit a donor recommendation?

Yes, recommendations may be submitted through email or mail.

- **Email:** Email info@pajewishendowment.org with your recommendation. Please include the fund name, grant amount, grant purpose and any additional instruction in the email.
- **Mail:** If you prefer to make manual recommendations, you can fill out the DAF form, which is located on the Foundation's website or at the end of the guide. You can then mail, email or fax the form to Jewish Community Foundation of Central PA.

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 Advancement Team at info@pajewishendowment.org or 717-409-8220.