



## Donor Portal for Fund Advisors and Fund Representatives

As a fund advisor or fund representative of the Hamilton Community Foundation, you have the ability to access your fund information online through our Donor Portal. *This is similar to online banking.* Within the portal, you can easily check your fund balance, view and download fund statements, request and track grants, add to your fund, make a donation 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 Hamilton 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 office at 513-863-1717 or email [kbraswell@hamiltonfoundation.org](mailto:kbraswell@hamiltonfoundation.org). Once you click on the invitation link in the email, you will be prompted to create a password of your choice. *Your password will need to use a capital letter, number and special character.*

A screenshot of the Hamilton Community Foundation Donor Login page. The page has a dark blue header with "Donate Now", "Donor Login", and "513.863.1717". Below the header is a navigation menu with links: Home, About, Our Impact, Donors, Grants, Advisors, Scholarships, News, Contact Us. The main content area has a red banner that says "Welcome to the Donor Login". Below the banner is a login form with a text input field containing "kbraswell@hamiltonfoundation.org", a password input field with "\*\*\*\*\*" and a "Forgot Password?" link, and a blue "Login" button. At the bottom of the form, there is a reminder: "As a reminder, your username is your email address. If you need to reset your password, click Forgot Password? above and follow the instructions. If you need additional assistance, contact Katie Braswell at 513-863-1717 or kbraswell@hamiltonfoundation.org". The footer of the page contains "info@hamiltonfoundation.org" and "513.863.1717".

## Returning Users

To access the Donor Portal, visit the Hamilton Community Foundation's website at [www.hamiltonfoundation.org](http://www.hamiltonfoundation.org) and click **Donor Login** on the top navigation bar. You will be redirected to a login page where you will enter your unique username (your email) and password.



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 office at 513-863-1717.

## 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.*

Recent Contributions				Recent Grants				
Date	ID	Contributor	Amount	Date	ID	Status	Recipient	Amount
11/05/2016	30018	NaPhilHCF Inter-Fund	10,000.00	11/08/2017	19865	Complete	Miami University Foundation	1,000.00

*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.

### [Gifts](#)

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.

### [Scholarships](#)

If you have a scholarship fund, this tab is where you will find your scholarship history as well as information about your student.

### [Make a Grant Request](#)

This tab allows you to make a grant request from your fund and see recent grant statuses. This allows you to also give to other funds at the Foundation.

### [Grant Catalog](#)

When available, the "Grant Catalog" tab is used as a crowdfunding tool that you may search for funding opportunities and projects to give to from your Fund.

### [Statements](#)

This tab shows your fund's statements

### [Files](#)

This tab will show any viewable files regarding your fund.

### [Donate](#)

This tab opens up a new window for you to make a gift to your fund through the use of your credit/debit card. You can also set up a recurring donation.

### [Receipts](#)

This tab will have your tax receipts from your gifts made to the Foundation.

### [Vouchers](#)

If appropriate, this tab will be where you can find any vouchers paid from your fund.

### [Invoices](#)

If appropriate, this tab will be where you can find any invoices that have been paid from your fund.

### [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:

### Choose a Grantee in one of four ways:

#### 1. Choose from Previous Grantee

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

~ or ~

#### 2. Other Foundation Funds

Choose a fund you want to support from the drop-down list of funds at Hamilton Community Foundation.

~ or ~

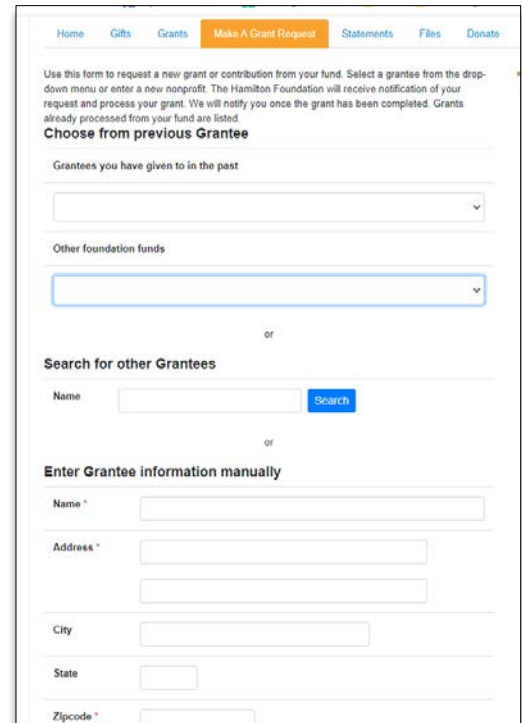
#### 3. Search for Other Grantees

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 ~

#### 4. 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**.



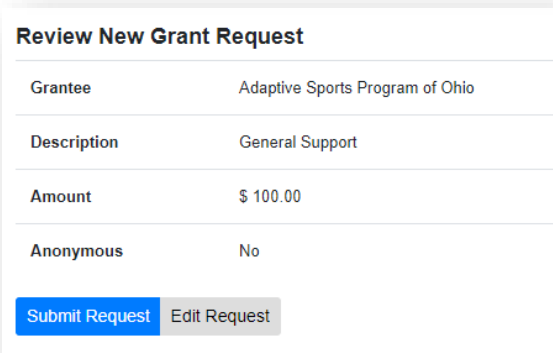

Once the organization has been selected, you will be redirected to a new page to provide pertinent grant details including grant description and amount.

## 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. A \$100 minimum is required for each grant request. You can also choose to remain anonymous by selecting the Anonymous checkbox. Once you are finished entering this information, click **Review**.

## 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 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 Katie Braswell at [kbraswell@hamiltonfoundation.org](mailto:kbraswell@hamiltonfoundation.org).

## Questions

If you have any questions about the Donor Portal, contact Katie Braswell at [kbraswell@hamiltonfoundation.org](mailto:kbraswell@hamiltonfoundation.org).