



Donor Portal User Guide

Name:

Username:

Password:



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Overview

As a fund holder of the Wichita Foundation, 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 fund and is available 24/7 from anywhere, on any device.

Creating Your Account

1. You will receive an email with a custom link to create your account in the Donor Portal.
2. 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 Director of Philanthropy at 316.264.4880 or meghan@wichitafoundation.org.
3. 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"/>

Returning Users

1. To access the Donor Portal, visit the Wichita Foundation's website at www.wichitafoundation.org and click Donor Login on the top navigation bar.
2. You will be redirected to a login page where you will enter your unique username and password. Your username will be your email address.
3. If you don't know your password, click on the Forgot Password link and reset your password.





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 tabs at the top of the page display different features available to you as a fund holder:

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

Shows your fund's quarterly fund statements. Next to the statement 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 Director of Philanthropy 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 at the Wichita Foundation. 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 a fund you want to support from this drop-down list of funds at the Wichita Foundation.

— 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 web form for selecting a grantee. It is divided into four sections marked with callouts A, B, C, and D:

- A:** "Choose from previous Grantee" - A dropdown menu labeled "Grantees you have given to in the past".
- B:** "Other foundation funds" - A dropdown menu labeled "Other foundation funds".
- C:** "Search for other Grantees" - A search section with input fields for "Name", "City", and "State", and a "SEARCH" button.
- D:** "Enter Grantee information manually" - A section with input fields for "Name", "Address", and "City", each with a "SEARCH" button.

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, provide the grant purpose and any special handling. You can choose to remain anonymous by selecting the Anonymous checkbox. You can also create recurring grants by selecting the Recurring checkbox.

Once you are finished, click **Review**.

The "New Grant Request" form contains the following fields:

- Grantee:** Guadalupe Health Foundation
- Description:** (text input field, 0/255 characters)
- Amount:** 5000
- Anonymous:**
- Recurring:**
- Attachment:** No file chosen (or drag and drop anywhere on the page)
- Attachment Description:** (text input field)
- Special Instructions:** (text input field)

A **REVIEW** button is located at the bottom left of the form.

The "Review New Grant Request" form displays the following information:

- Grantee:** Guadalupe Health Foundation
- Description:** general support
- Amount:** \$ 5,000
- Anonymous:** No
- Special Instructions:**

Your grant request(s) have been received. You can check the status of the grant by clicking the "Grants" tab at the top of the page. Grants are fully processed with they are listed as "Complete."

Grants must be entered by the 9th day of the month and will be processed on the 16th of the same month.

If you have any questions, contact Meghan at meghan@wichitafoundation.org.

Buttons for **Submit Request** and **Edit Request** are at the bottom.

3. Review and Submit Request

Review your grant request details and click Submit Request.



Viewing Grant History

To review your most recent grant history, click the **Grant Request** tab.

Date	Status	Recipient	Description	Amount
11/03/2022	Request	Guadalupe Health Foundation	general support	5,000.00

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

Completed means the grant request has successfully been fulfilled.

Questions

If you have any questions about the Donor Portal, contact our Director of Philanthropy at 316.264.4880 or meghan@wichitafoundation.org.



Donor Portal Frequently Asked Questions

How often are quarterly fund statements posted?

Quarterly fund statements are posted the month immediately 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 our Director of Philanthropy at 316.264.4880 or meghan@wichitafoundation.org.

How do I change my password?

If you need to change your password, click on the Forgot Password link on the login page and reset your password.

When are grant requests processed?

Generally, recommendations are processed the 15th of every 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/fax.

- **Email:** Email meghan@wichitafoundation.org with your recommendation. Please include the fund name, grant amount, grant purpose and any additional instruction in the email. Our Director of Philanthropy will email a confirmation of the recommendation.
- **Mail/Fax:** If you prefer to make manual recommendations, you can fill out the Grant Recommendation form, which is located on the Foundation's [website](#). You can then mail, email or fax the form to the Wichita Foundation.

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 Director of Philanthropy at meghan@wichitafoundation.org or 316.264.4880.