



Community Foundation  
*of* Eastern Connecticut

# Fundholder Portal Guide

**Name:**

**Username:**

**Password:**

# Fundholder portal Guide

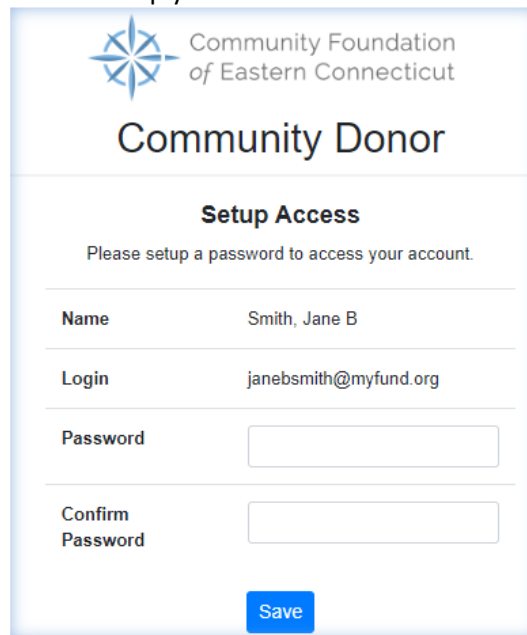
## Fundholder Portal

As a fund advisor for a fund held at the Community Foundation of Eastern Connecticut (CFECT), you have the ability to access your fund information online through our Fundholder Portal. Within the portal, you can easily check your fund balance, view and download monthly fund statements, add to your fund and if your fund is a Donor Advised fund, make and track grant recommendations. The Fundholder Portal makes it easy to manage your fund and is available 24/7 from anywhere, on any device. It is located at the top of our website.



## Initial Login Process and Creating Your Account

You will receive an email from CFECT with a custom invitation link to create your account in the Fundholder 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 Alison Woods at [alison@cfect.org](mailto:alison@cfect.org) or Janet Grant at [janet@cfect.org](mailto:janet@cfect.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.

A screenshot of the 'Community Donor Setup Access' form. The form has a light blue border and a white background. At the top, it features the CFECT logo and the text 'Community Foundation of Eastern Connecticut'. Below this is the heading 'Community Donor' and the sub-heading 'Setup Access'. The form contains the following fields: 'Name' with the value 'Smith, Jane B', 'Login' with the value 'janebsmith@myfund.org', 'Password' with an empty text box, and 'Confirm Password' with an empty text box. A blue 'Save' button is located at the bottom of the form.

## Returning Users

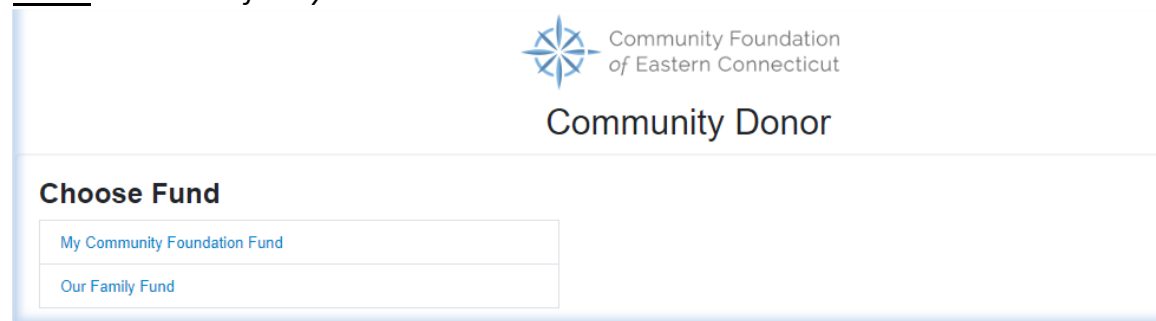
To access the Fundholder Portal, visit CFECT's website at [www.cfect.org](http://www.cfect.org) and click Fundholder Portal Login on the top navigation bar or from this link: <https://www.cfect.org/Donors/Start-a-Fund/Fundholder-Portal>.

You will be redirected to a login page where you will enter your unique username and password. If you forgot your credentials, please contact Alison Woods at [alison@cfect.org](mailto:alison@cfect.org) or Janet Grant at [janet@cfect.org](mailto:janet@cfect.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.

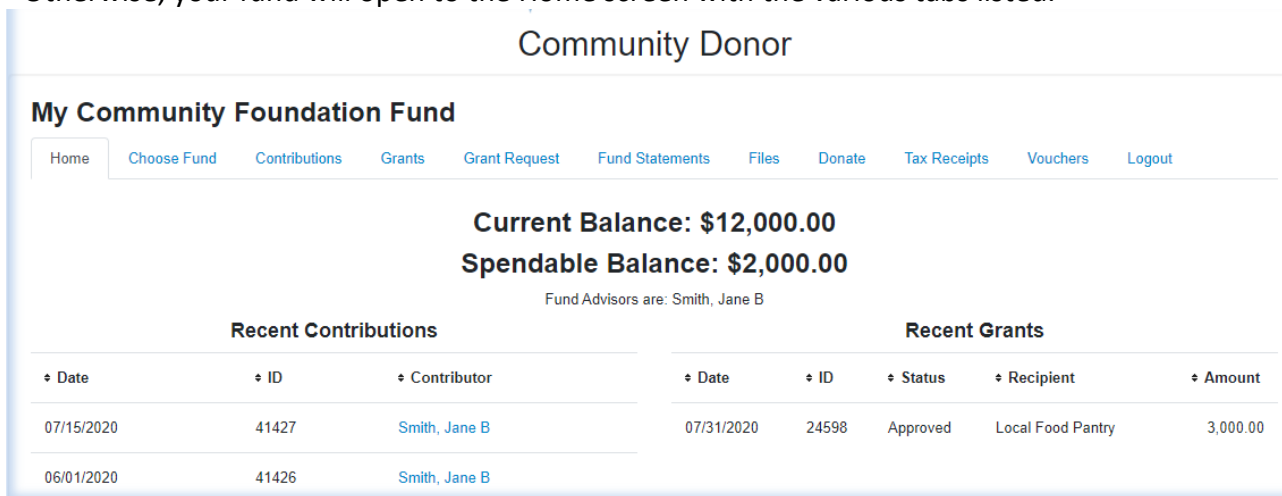
Note: The Fundholder Portal will lock you out after five unsuccessful login attempts. If you are locked out, please contact Alison Woods at [alison@cfect.org](mailto:alison@cfect.org) or Janet Grant at [janet@cfect.org](mailto:janet@cfect.org).

## Fundholder Portal Features

Once you are logged in, your fund's homepage will appear. *If you manage multiple funds, you will see them listed.* Choose the fund you wish to review.



Otherwise, your fund will open to the Home screen with the various tabs listed.



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 (Donor Advised Funds only)

This tab allows you to make a grant request from your fund and see recent grant statuses.

### Fund Statements

This tab shows your fund's monthly fund statements. 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.

### 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.

### Tax Receipts

This tab will show all the tax receipts made from online donations.

### Logout

Clicking Logout will automatically log you out of the Fundholder portal.

## Submitting a Grant Request (for Donor Advised Funds only)

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 held at CFECT (ex. Women & Girls Funds)

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 main sections labeled A, B, C, and D. Section A is "Grantees you have given to in the past" with a dropdown menu. Section B is "Other foundation funds" with a dropdown menu. Section C is "Search for other Grantees" with a text input field for "Name" and a blue "Search" button. Section D is "Enter Grantee information manually" with text input fields for "Name \*" and "Address \*".

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**. A \$250 minimum is required for each grant request. You can also choose to have your grant issued as an "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.

The screenshot shows a form titled "New Grant Request" with the following fields: "Grantee" (Local Food Pantry), "Description" (text area with 0/255 characters), "Amount" (250.00), "Anonymous" (checkbox), "Recurring" (checkbox), "Attachment" (Choose Files button, No file chosen), "Attachment Description" (text area), "Grant Request Purpose/Comments" (text area with "General Support" entered), and a blue "Review" button at the bottom.

## Viewing Grant History

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

**My Community Foundation Fund**

Home Choose Fund Contributions Grants **Grant Request** Fund Statements Files Donate Tax Receipts Vouchers Logout

Use this form to request a new grant or contribution from your fund. Select a grantee from the drop-down menu or enter a new nonprofit. The Community Foundation of Eastern Connecticut (CFECT) will receive notification of your request and process your grant. We will notify you once the grant has been completed. Grants already processed from your fund are listed.

**Choose from previous Grantee**

Grantees you have given to in the past

Grants

Date	Status	Recipient	Description	Amount	
08/12/2020	Request	Local Food Pantry		250.00	Cancel
07/31/2020	Approved	Local Food Pantry	to support community food program	3,000.00	

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 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 Alison Woods at [alison@cfect.org](mailto:alison@cfect.org) or Janet Grant at [janet@cfect.org](mailto:janet@cfect.org)

## Questions

If you have any questions about the Fundholder Portal, please contact Alison Woods at [alison@cfect.org](mailto:alison@cfect.org) or Janet Grant at [janet@cfect.org](mailto:janet@cfect.org)

# Fundholder Portal Frequently Asked Questions

## **How often are Fund Statements posted?**

Fund Statements are posted around the middle of the month, immediately following the end of each month. You will be notified via email when your summary is ready to be viewed in the Fundholder portal. If you are not receiving these notification emails, please contact Alison Woods at [alison@cfect.org](mailto:alison@cfect.org) or Janet Grant at [janet@cfect.org](mailto:janet@cfect.org).

## **How do I change my password?**

If you need to change your password, please contact Alison Woods at [alison@cfect.org](mailto:alison@cfect.org) or Janet Grant at [janet@cfect.org](mailto:janet@cfect.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!

FOR DONOR ADVISED FUNDS:

## **How long does it take for my Donor Advised Fund grant recommendation(s) to be processed?**

Generally, recommendations are processed within five business days.

## **Who can I make recommendations to?**

Grant recommendations may be made to 501(c)(3) organizations and for other charitable purposes such as schools, libraries, churches and municipalities. Click [here](#) for more information on Donor Advised Funds.

## **What is the minimum amount for a grant recommendation?**

A \$250 minimum is required for each grant recommendation.

## **Are there other ways to submit a donor recommendation?**

Yes, recommendations may be submitted through email to Alison Woods (New London County) at [alison@cfect.org](mailto:alison@cfect.org) or Lauren C. Parda (Windham and Tolland Counties) at [lauren@cfect.org](mailto:lauren@cfect.org). Please include the fund name, grant amount, grant purpose and any additional instruction in the email.

## **How do I know if a grant I recommended has been issued?**

Your most recent grants paid will be listed on your Fundholder 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.

*If you have any questions or are experiencing issues with the Fundholder Portal, please contact Alison Woods at [alison@cfect.org](mailto:alison@cfect.org) or Janet Grant at [janet@cfect.org](mailto:janet@cfect.org).*

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