The Jewish Community Foundation is pleased to introduce a new online Fund Holder portal to make it convenient for you to access information and recommend changes to your charitable fund(s).

For those who utilized JCF’s Donor Central in the past, many of the functionalities are the same within this new system. For those who have not used a donor portal before, welcome! We think you will be pleased with the functionalities now at your fingertips. Once logged into the portal, you can review your fund balance, retrieve fund statements, make grant recommendations, view gift and grant history, and more.

This guide will help you begin using the portal.

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Get Started

• **Navigate to the login page** at [https://jcftucson.org/portal](https://jcftucson.org/portal).
  - You can bookmark this page for easy access in the future.
  - You can also access this page at any time through the top navigation bar of the jcftucson.org website:

![Portal Image](jewishcommunityfoundationofsouthernarizona.com)

• **Register for an account.**
  - All Donor Advised Fund Holders will need to register for an account the first time that they access the system, regardless of whether they utilized Donor Central in the past.
  - **Create a password.** Passwords must be at least 8 characters in length and include a mix of upper- and lower-case letters, with at least one digit or special character. Here you can also create a password hint to help remind you of that password if you forget it at some point.

![Sign In Form](sign-in-form.png)

• **Receive confirmation.** Once you have registered, our team will verify your information and approve your account. This helps ensure that your information is kept secure. You will receive a confirmation email from [promise@jcftucson.org](mailto:promise@jcftucson.org) when you are granted access to the portal. *Please allow a few days for approval.*

• **Log in to the portal** with the email and password you used to set up your account.
• **If at any time in the future you lose your email and/or password,** you can request a password hint or password reset on the [Sign In Page](https://jcftucson.org/portal).
Find Help

- There is a green question mark icon at the top right of each page in the portal. Click the icon for a quick guide to all the various features of the page. This will also bring up a search bar for more specific queries.

Navigate the Site

- The **Donor Home Page** provides a quick view of activity associated with your fund, including your fund balance, grant summary information, a grant history chart, a gift history chart, and more. You can organize the page to your liking by expanding or collapsing each tile and dragging and dropping them into your preferred layout.
If you have “view-only” access to a fund, you will have access to the Fund Viewer Dropdown Menu which also gives you quick access to areas of the portal.

Recommend a Grant

推荐一笔赠款

Recommending a grant from within the fund holder portal is simple. You can copy previous grants you have made, search for organizations in our database, or add a new organization to recommend a grant. All organizations are vetted by our professional team to ensure they are eligible to receive a grant.

- Select RECOMMEND GRANT from the DONOR menu at the top of the screen. You will need to complete information on each of the 5 tabs on the bottom half of the screen.

1. **Fund Details Tab**: You will see the name(s) of your fund(s) and basic information here. If you have more than one fund, click the Edit button to search for and select the fund from which you want to recommend a grant and click ‘Save.’
2. **Recipient Tab**: Click the ‘+Add’ button to select or add a recipient. You will see options for searching for a recipient. Be sure to click ‘Save’ after you have made your selection.

- **To recommend a grant to an organization you have supported in the past**, you may choose Search for recipients in past grant requests. This takes you to your Grant History page. Click the ellipsis (...) button next to the organization you want to make a grant to and choose Add to grant recommendation.

- **To recommend a grant to an organization you have not supported in the past**, select ‘Search all recipients in the database.’ If you do not find it listed, select ‘Enter a new recipient’ and enter information about the organization.

3. **Grant Information Tab**: Click the ‘Edit’ button to enter details about the grant including amount, whether it’s a recurring grant (and if so, the payment frequency), grant designation, special instructions (if needed), and notes to staff, e.g., whether the donor or fund should be anonymous. Click the ‘Save’ button.
4. **Acknowledgment Tab:** If you would like an acknowledgment letter detailing the grant information sent to anyone other than yourself, click the ‘Edit’ button to enter their information.

![Acknowledgment Tab Example]

5. **Submission Tab:** Acknowledge the grant recommendation requirements by checking the ‘I Agree’ box and click the ‘Submit’ button. You will receive a confirmation to the email address associated with your account.

![Submission Tab Example]

**NOTE:** If you are unable to complete a grant recommendation in one sitting, you can access it later by selecting **FUND SUMMARY** from the **DONOR** dropdown menus on the home page. Information that was saved on each tab will still be there.
View Your Fund Information

Select **FUND SUMMARY** from the **DONOR** menu to access fund information. If you have multiple funds, you can select which fund you would like to view, or you can select all. You will see aggregated information about contributions, grants, net investment earnings, and more. You can view more detail about each item by clicking the button next to the fund you are interested in. Click the back button on your browser to return to the **Fund Summary** page.

View Your Fund Statements

Select **REPORTS** from the **DONOR** menu, then **DONOR FUND STATEMENT**.

Select the fund you would like to see a statement for in the dropdown Fund Name menu, select the start date and end date of the period you would like to view. Click ‘View Report.’
View Grant History

Select **GRANT HISTORY** from the **DONOR** menu. A list of your prior grants will display. You can search for specific grants using the search box as well as change the number of grants that will display on the page.

Click the ellipsis button (…) next to the grant and click **Open Recipient** to view organization information. You may make a grant recommendation to an organization on this list by clicking the ellipsis button and selecting **Create grant recommendation** (see “Recommend a Grant” on Page 4).
View Gift History

Select **GIFT HISTORY** from the **DONOR** menu. A list of contributions will display. Select ‘Mine’ to see your personal gifts. Select ‘All’ to see every contribution to the fund by you and others. You can search for specific contributions using the search box. You also can set the number of contributions to display per page.

If you are an advisor for the selected fund then you can see gifts made by all donors. If you chose 'All' then you must be an A gifts here.

<table>
<thead>
<tr>
<th>Fund</th>
<th>100000000 - Michael Stern Donor Fund</th>
<th>Select Fund</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Available Balance $800</td>
<td></td>
</tr>
<tr>
<td></td>
<td>As of 12/2/2021</td>
<td></td>
</tr>
<tr>
<td>Gift Source</td>
<td>Mine ○ All □</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Open</th>
<th>Date</th>
<th>Type</th>
<th>Donor</th>
<th>Amount</th>
<th>Reference</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
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<td>1/24/2021</td>
<td>Cash</td>
<td></td>
<td>$200</td>
<td></td>
<td></td>
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<tr>
<td>Open</td>
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<td>$200</td>
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<td>1/28/2019</td>
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<tr>
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<td>1/31/2019</td>
<td>Cash</td>
<td></td>
<td>$200</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Manage Your Account Information

You may edit your contact information and change your password on your My Account page. Select **MY ACCOUNT** from the navigation menu to access these functions.

Do You Have Additional Questions?

Contact the professional team at the Jewish Community Foundation at (520) 577-0388 or promise@jcftucson.org.