

PORTAL USER GUIDE v 4.25

Login

Navigate to the Community Foundation of Northeast Iowa home page at <https://www.cfneia.org/>

Click on the word "LOGIN" in the top right corner and options will drop down.

Click the Login button located under the Fundholders heading.

When directed, use one of the two options below to log in.

OPTION 1: If you have login information including a username and password, Login with username/password as usual.

- Enter the username and password, and then click **Login**.



REMINDER: Your username is your email address and usernames are CASE SENSITIVE (typically all lowercase). If you need to reset your password, click on the FORGOT PASSWORD link. Passwords are also case sensitive. If you forgot your username, please contact donorrelations@cfneia.org or call 319-287-9106.

Username

Password

LOGIN

[Login with email](#)

[Forgot your password?](#)

OPTION 2: If you are new to the portal or do not have a username or password

- Login with email address only
 - Enter the email address, and then click **Login**. A PIN will be sent to the email address entered. Enter the PIN, and then click **Login**.



REMINDER: Your username is your email address and usernames are CASE SENSITIVE (typically all lowercase). If you need to reset your password, click on the FORGOT PASSWORD link. Passwords are also case sensitive. If you forgot your username, please contact donorrelations@cfneia.org or call 319-287-9106.

Email Address

LOGIN

[Login with username/password](#)



REMINDER: Your username is your email address and usernames are CASE SENSITIVE (typically all lowercase). If you need to reset your password, click on the FORGOT PASSWORD link. Passwords are also case sensitive. If you forgot your username, please contact donorrelations@cfneia.org or call 319-287-9106.

Verify your pin

An email has been sent to the email provided. It contains a PIN which will be valid for up to 3 minutes. Check your spam or junk folders if you do not receive the email.

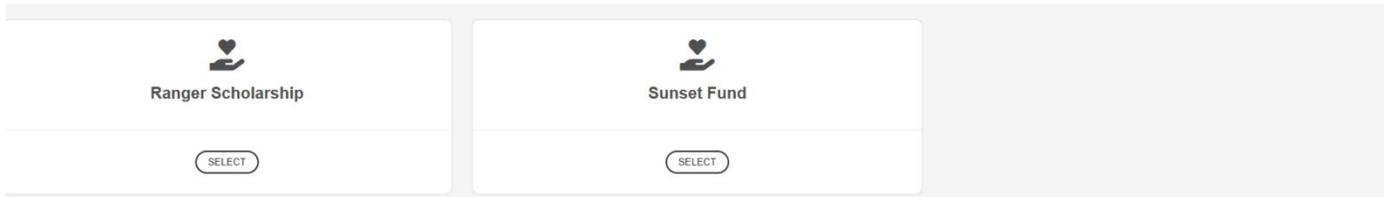
Pin

LOGIN

[Login with email](#)

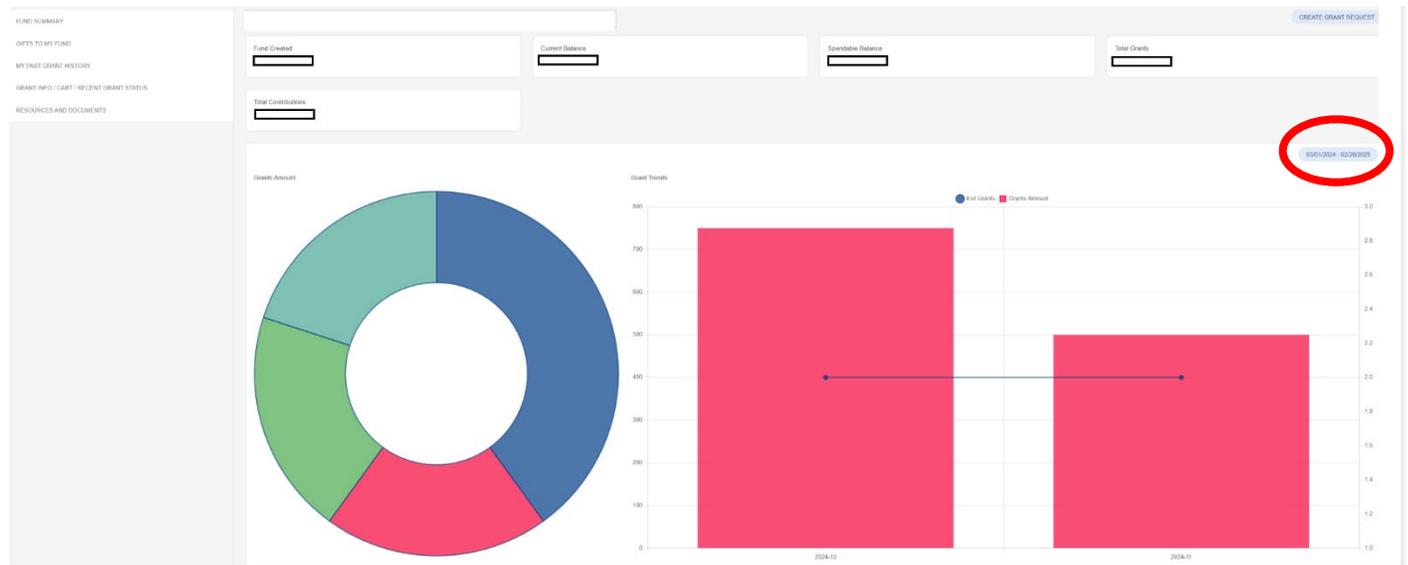
The **Fund Summary** landing page varies depending on the type and number of funds you have.

If you have multiple funds, select a fund to show a single fund summary page and a drop-down box to toggle between your funds.



A single fund page displays current and spendable balance and total grants and contributions. It may also display graphs of historical grants and contributions. If no graphs are visible, the type of fund you have does not allow that option.

Please **NOTE** that you may customize the information by adjusting the reporting dates located in the top right corner of the graph section circled in red below.



The fund advisor's cart button is also visible if you have grant requests not fully submitted.

From this page you have a left navigation list associated with your access to the fund(s). Please note that, depending on the type of fund you have, you may not have access to all of the tabs listed below and defined on the following page.

FUND SUMMARY

GIFTS TO MY FUND

MY PAST GRANT HISTORY

GRANT INFO / CART / RECENT GRANT STATUS

RESOURCES AND DOCUMENTS

FUND SUMMARY – allows you to return to your original landing page.

GIFTS TO MY FUND - shows all contributions or donations that have come into your fund. Clicking on a contributor's name in the list will bring up their history of contributions to your fund.

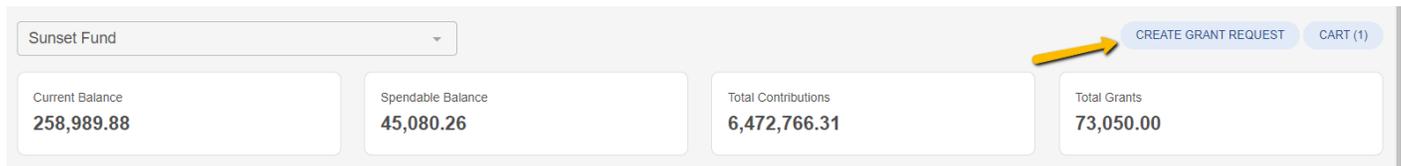
MY PAST GRANT HISTORY - shows the history of all grants made from your fund. Clicking on a grantee in the list will allow you to see the details of the grant made to that particular grantee.

GRANT INFO / CART / RECENT GRANT STATUS – Shows information about creating a new grant request, any grant requests that are started but unsubmitted as well as a snapshot of your granting history including status of past and pending requests. Note that this will not be available to you if you have view only access to this fund.

RESOURCES AND DOCUMENTS – Contains additional statements and documents in reference to your fund.

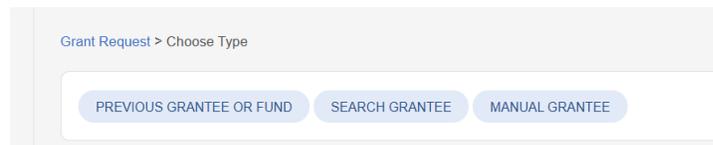
Create Grant Request

Fund advisors with grant request permissions should click the **Create Grant Request** button found on the top right-hand side of the screen.



The screenshot shows a dashboard for 'Sunset Fund'. At the top left is a dropdown menu with 'Sunset Fund' selected. Below this are four summary boxes: 'Current Balance' (258,989.88), 'Spendable Balance' (45,080.26), 'Total Contributions' (6,472,766.31), and 'Total Grants' (73,050.00). On the right side, there are two buttons: 'CREATE GRANT REQUEST' and 'CART (1)'. A yellow arrow points to the 'CREATE GRANT REQUEST' button.

Choose from previous grantee, search for a grantee, or manually create a new grantee to begin a new grant request.



The screenshot shows a screen titled 'Grant Request > Choose Type'. Below the title are three buttons: 'PREVIOUS GRANTEE OR FUND', 'SEARCH GRANTEE', and 'MANUAL GRANTEE'.

- **Previous Grantee** – Grantees that you have given to in the past.
- **Search Grantee** – Search CFNEIA grantees by name, city, state, and EIN.
 - Name or EIN is required.
- **Manual Grantee** – Manually enter grantee name and contact information

Grant Request

Grantee: Allied Arts

Additional Grantee Contact:

Description: Supporting community art through the art walk 45/255 characters

Amount: 500

Anonymous:

Recurring:

Attachment: No file chosen (or drag and drop anywhere on the page)

Attachment Description:

Additional Notes: September Art Walk

Confirm Grant Request

Grantee - The name selected auto-populates.

Description - Provide a brief description of this grant's purpose.

This field is limited to 255 characters.

Amount - **Please note that all grant requests are required to be a minimum of \$250**

Anonymous - If checked, the fund name will not be included on the check.

Recurring - **DO NOT CHECK THIS BOX. WE DO NOT OFFER THIS OPTION**

Attachment - Attach supporting documentation by browsing to the file or by dragging and dropping the file on the page.

Attachment Description - Enter details about the attached documentation.

Additional Notes - Enter additional information.

Sample information may include the following:

- Nonprofit (grantee) Tax ID number.
- Notation of "in honor of" or "in memory of."
- Note if the grant is for a particular program or cause within a bigger nonprofit organization.
- Note if the grant should be directed to a specific person or department.

Confirm Grant Request after completing all fields and click **Add to Cart**. (see example on next page)

The **Grant Request Cart** displays at the top if there are pending requests that need to be reviewed and submitted. To create additional grant requests, select the Create Grant Request button at the top right-hand corner again.

Grant requests submitted by the fund advisor are displayed in a **Grants** list that includes request date, status, recipient, description, and amount. If the grant status allows, the grant can be canceled.

Sunset Fund

| Grant Request Cart | | | | <input type="button" value="REVIEW GRANT REQUESTS"/> |
|---------------------------------------|-------------------------------|-----------------------------------|--|--|
| | Recipient | Description | Amount | |
| <input type="button" value="DELETE"/> | Fort Worth Bike Share Program | Summer donation for new bikes | 2,000.00 | <input type="button" value="EDIT"/> |
| Grant Request Total | | | 2,000.00 | |
| Grants | | | | |
| Request Date | Status | Recipient | Description | Amount |
| 07/24/2024 | Request | Allied Arts | Supporting community art through art walk. | 500.00 <input type="button" value="CANCEL"/> |
| 07/01/2024 | Pending | Make-A-Wish Foundation of America | May sponsorship | 2,000.00 |
| 06/30/2024 | Request | Make-A-Wish Foundation of America | June sponsorship | 2,000.00 <input type="button" value="CANCEL"/> |
| 06/30/2024 | Request | Denver Bike Share Program | Keep pedaling! | 2,500.00 <input type="button" value="CANCEL"/> |

Grant Request Cart

Click **Review Grant Requests** to review the grants that are pending. If the information looks correct.

| Grant Request Cart | | | REVIEW GRANT REQUESTS |
|------------------------|-------------------------------|-------------------------------|---------------------------------------|
| Recipient | Description | Amount | |
| DELETE | Fort Worth Bike Share Program | Summer donation for new bikes | 2,000.00 EDIT |
| Grant Request Total | | 2,000.00 | |

Review the grant information, and then click **Submit Grant Requests**.

| Grant Request Cart | | Amount | Anonymous |
|------------------------------|-------------|------------|--------------|
| Grantee | Description | Attachment | |
| Grantee Info | | | \$ 250.00 No |
| Total | | | \$ 250.00 |

PLEASE BE SURE THE "RECURRING" CHECKBOX ON THE PREVIOUS PAGE IS NOT CHECKED FOR YOUR GRANT. WE CURRENTLY DO NOT SUPPORT THAT OPTION.

In accordance with provisions of the Internal Revenue Code governing community foundations and Donor Advised Funds, it is understood that the Community Foundation is not bound by this recommendation. It is also understood that grants from the Community Foundation cannot be made to satisfy an individual's personal pledge to an organization, and that no goods, benefits, or services are being given to the Foundation, the donor(s) or Advisor(s) to the named Fund(s), or their family members as a result of this grant. Also prohibited are grants for political contributions or to support political campaigns, as well as grants to individuals from advised funds.

You will receive an email confirmation once you have submitted your request. Please allow two weeks for grant processing.
BY SUBMITTING THIS GRANT RECOMMENDATION, YOU ACKNOWLEDGE AND AGREE TO THE PROVISIONS OUTLINED ABOVE.

[SUBMIT GRANT REQUESTS](#)

Once submitted, a confirmation message will be displayed along with the option to continue.

- Fund advisors will receive an email confirming they have submitted grant requests. If grant requests are submitted in batch, fund advisors will receive one email for the entire batch of requests.



The new requests will move to the grants list.

Grants List

Grant requests that have been made by the fund advisor display in a list. If a grant request can be canceled, the option to do so is displayed.

| Grants | | | | | |
|--------------|---------|-----------------------------------|--|----------|------------------------|
| Request Date | Status | Recipient | Description | Amount | |
| 07/24/2024 | Request | Allied Arts | Supporting community art through art walk. | 500.00 | CANCEL |
| 07/01/2024 | Pending | Make-A-Wish Foundation of America | May sponsorship | 2,000.00 | CANCEL |
| 06/30/2024 | Request | Make-A-Wish Foundation of America | June sponsorship | 2,000.00 | CANCEL |
| 06/30/2024 | Request | Denver Bike Share Program | Keep pedaling! | 2,500.00 | CANCEL |
| 05/15/2024 | Request | Denver Bike Share Program | Bike helmets save lives. | 2,250.00 | CANCEL |
| 05/15/2024 | Pending | The Gloss Mountains Foundation | Genealogy Support | 1,750.00 | |
| 05/15/2024 | Paid | Allied Arts | Community Art support | 3,500.00 | |

Make a New Grant | Additional Information for Success

Regarding selecting a grantee...

- The grantee you select must be a nonprofit organization.
- Grants cannot go to an organization in exchange for either a good or service from that organization. For example, you cannot make a grant to an organization in exchange for tickets to their annual fundraiser.
- To make a grant to a fund held with the Community Foundation, please make sure to NOT select an endowment fund (unless you are specifically trying to help grow an organization's endowment fund).

Regarding submitting your grant request..

- Grant requests may take up to two weeks to process once they are submitted to CFNEIA staff for review.
- If you have questions regarding the status of your submitted grant request, you can log into your portal and the 'Make A New Grant' tab will list your recently submitted grant at the very bottom of the screen. This will show you the current status of your grant request, which will be pending until it is fully processed by CFNEIA staff.
- Until it is fully processed, you will also have the option to cancel your grant should you change your mind about your request.

If you have any questions or need assistance please contact our Donor Relations team at donorrelations@cfneia.org or (319) 287-9106.

You may also schedule either an in-person or virtual appointment with our staff to go over the online portal more in-depth.

The Community Foundation of Northeast Iowa is located at:
3117 Greenhill Circle
Cedar Falls, Iowa 50613