Portal Guide

Tahoe Truckee Community Foundation (TTCF) is committed to providing our fundholders with the best tools and resources to make critical gifts and grants. The Foundation uses an online Portal to provide a secure and easy way to access fund information.

For TTCF Fund Holders: Depending on the fund type, you can view fund balances, make grant recommendations, and/or review gift history, statements, and files.

The information provided below is meant to guide you in learning this system. If you need additional assistance or have any questions, please contact the Donor Services team at 530-587-1776 or by emailing donorservices@ttcf.net.

Logging into the Portal for the First Time

Navigate to our website at ttcf.net and select "Donor Login" at the top right of the homepage.

Current Fund Advisors: Log in with your existing login credentials.

New Fund Advisors or First-Time Logins: Use the primary email on file with TTCF to receive an authentication email with a PIN. Once you enter your PIN, you will be logged into the system.

If you are logging in for the first time: You can either (1) use your email and receive a pin to log in for every session, or (2) you may opt to set up a username and password. These options will remain on the initial login page.

Profile information

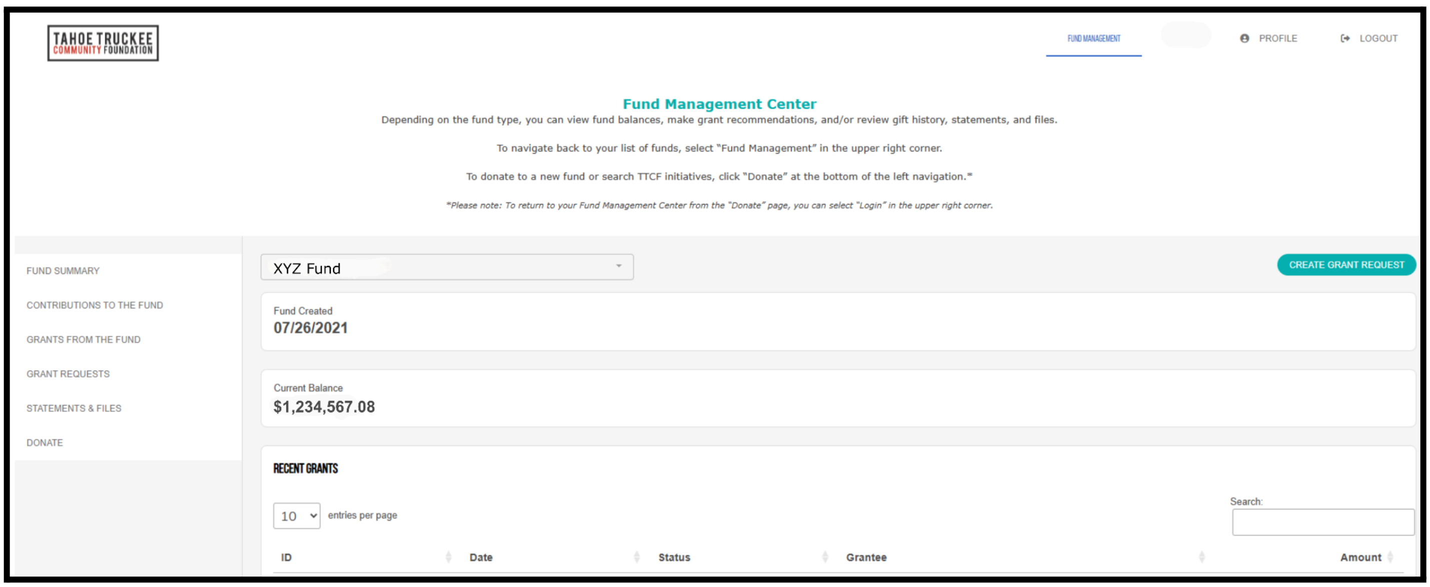
Select the "Personal Information" tab on the left to view or update your personal contact information. If you have multiple addresses, phone numbers, or emails you've shared with TTCF, note that you'll only see your primary contact information we have on file in this area. Feel free to reach out to us to let us know of any changes.

Select “Security” on the left-hand side of your Profile Information section to update your username and password. You can enter your username and password here. We recommend using your primary email address as your username.

Tab Selections (Fund Advisors)

Once logged in, you can select “Fund Management” at the top of your navigation menu. This will take you to the Funa Management Center. All of the funds that you have access to will display. If you have access to only one fund, you will go directly to the homepage for that fund.

Once you select a fund, you can navigate via the menu on the left side of your screen. As a reminder, depending on the type of fund that you manage at the Foundation, you may not see all of the below tab selections. Please contact us if custom reporting is needed.



- **Fund Summary Tab**
  This tab provides the fund’s current balance, the spendable balance (applicable to endowed funds only), and total grants.

- **Contributions to the Fund Tab**
  This tab shows the details for each gift contributed and received into the fund. Unless the donor has requested to remain anonymous, you can view more information about each donor by clicking their name.

  Click the teal “Filter” and “Export” buttons on the right side to sort and export the details into an Excel spreadsheet for your records.

- **Grants From the Fund Tab**
  The top menu in the Grants area will show three (3) options to learn more about

the fund's grants. This tab provides details on all grants distributed from the fund.

Grant Summary: Lists total cumulative grants awarded to each grantee.

Grant History: Lists each grant made from the fund, starting with the most recent.

- You can make copies of previous grants by selecting the teal “Copy” button. This will create a new grant request with the exact details of the previous grant recommendation.
- The “Status” column reflects where the grant is in the process. “Request” means that the recommendation has been submitted. “Paid/Complete” means the grant has been mailed and paid to the grantee. Please contact the Foundation if you have questions about the status of a grant.

Recurring Grants: Lists any recurring grants associated with the fund. When you select an individual recurring grant, the option to edit it will appear on the right-hand side.

- **Grant Requests Tab**

Depending on the type of fund, you *may* be able to make grant requests from the fund by “Create Grant Request” button in the upper right-hand side. Then select from the following 3 options to proceed in your grant request.

1. **Previous Grantee**
   This will allow you to choose from a grantee you have given to in the past, a Foundation fund you have given to in the past, or other Foundation funds you might want to support.

2. **Search Grantee:**
   This selection allows you to search for a grantee based on name, address, or EIN. The system will search the Foundation’s database and Candid for organizations containing your selected keywords. Candid is an information service specializing in reporting on U.S. nonprofit organizations.

   The more keywords used, the better the search results will be. Results will be displayed from the Foundation’s database and then from Candid.

   Please note: This tool does not automatically guarantee that an organization will pass the Foundation’s due diligence; that procedure will still occur during processing.

3. **Enter a Grantee Manually**
   This selection allows you to manually enter nonprofit or grantee details. To

move the grant request to the Foundation’s staff for due diligence, you must enter the grantee's name, address, zip code, and phone number.

Regardless of how you choose to submit your grant recommendation, once the grantee information has been added, you can complete the request by filling out the remaining details of the grant request and clicking the SUBMIT button at the bottom of the page.

- **Statements and Files Tab**
  This tab allows you to review current and previous fund statements. If you would like to see additional historical information, please contact donorservices@ttcf.net. Fund statements received via mail will not be listed on the portal.

  This tab may also display files related to the fund’s authorized users.

- **Donate Tab**
  The Donate tab allows you to contribute online to any listed funds at the Foundation. By clicking this tab, you will be redirected to our website’s Giving Hub and invited to select the fund you want to contribute to. To return to the Fund Management Center from the “Donate” page, select “Login” in the upper right corner.

  Please Note: The Foundation is unable to support active fundraising or solicitation for contributions to any of the funds it holds.

  If you have questions about your contribution using the “DONATE” button, please contact the Donor Services team at 530-587-1776 or by email at donorservices@ttcf.net .

Logging Out of the Portal
Remember to log out of the Portal when you have completed your activities. Click the “Logout” button in your screen's upper right-hand corner to securely exit the Portal. You will be automatically logged out each night, even if you do not remember to log out, so if you’ve created one, we recommend that you make note of your new username and password in a safe place for your records.

Locked Out of your Portal?
If you cannot gain access to your account, please contact the Donor Services team at 530-587-1776 or by email at donorservices@ttcf.net.

Additional FAQ

1. **I want to update my information. Can I do that in the Portal?**
   You can update your personal information in the Portal. Click “Profile” in the upper right-hand corner, then make sure you are in the “Personal Information” tab to edit the primary information listed. Any changes made in the portal will be reflected in the Foundation’s internal records.

   Please contact the Donor Services team if you need to update or provide additional contact information.

2. **I want to update the fund’s information. Can I do that in the Portal?**
   No. If you want to update the fund's details (such as name, investment recommendations, etc.), please contact the Donor Services team.

3. **How will I know if I submitted a grant successfully?**
   You can check the grant's status in the portal on the “Grant Requests” tab. Additionally, you should receive an emailed grant confirmation once the grant has been posted and mailed to the grantee.

4. **How long does it take to process a grant recommendation?**
   Grant recommendations will be submitted immediately to the queue for due diligence review and processing. Occasionally, this timeline may need to be adjusted due to holidays, our due diligence process results, or other one-time occurrences. We generally expect to issue grants within 7-10 business days of submission.

5. **Why can’t I recommend a grant?**
   Not all fund types have the same permissions; what you were able to do in the old system is not the same as what you will be able to do in the new system. Please contact us if you have questions about the level of access or available options on the fund you advise.

6. **On what devices may I access the Portal?**
   The new Portal is compatible with most devices that access the Internet through a browser (e.g., smartphones, tablets, and PCs). However, there is **no separate app** for the system.

   The preferred browser to use is Google Chrome.

7. **Can I recommend a grant of the entire fund balance listed in the portal?**

The fund balance listed in the Portal shows the total amount in the fund. However, the specific fund type and any minimum balance requirements may apply. For example, all endowed funds are subject to the TTCF Board-approved spend policy, and only the Spendable Balance amount shown on the Portal is available for grant recommendations. Please contact our donor services team if you have questions.

8. **Why is my contribution amount different than the amount I sent in stocks?**
   The Foundation records the value of the gift on the date we receive it. Any gain or loss due to a difference in when the stock was received and when it was sold will be applied to the fund.

9. **How quickly will my contribution show up in my Portal?**
   The Foundation will process your gift within 1-10 business days. During specific peak periods, such as the end of the calendar year, gift processing may take longer than usual.