



The Jewish Federation & Foundation of Northeast Florida (JFFNF) is committed to providing our fund holders with the best tools and resources to make critical grants where they are needed most. JFFNF uses an online Portal to provide a secure and easy way to access fund information. Depending on the type of fund you advise, you may be able to view the latest fund balances, make grant recommendations, or review gift history. **The information provided below is meant to guide you in learning this system.**

Logging into the Donor Portal for the First Time

You will be emailed a link to set up your account information. Once you are in the site, you will be prompted to set a password. **Your email address will be your username.** The first screen you see will look like this:

For Individuals Who Advise Multiple Funds

If you advise multiple funds, you will see all the funds you advise listed on the home page of the portal. Choose the account with which you wish to interact. If you are listed as an advisor for only one fund, you will go directly to the homepage for that fund.

Tab Selections

Once you have logged in, you can select the tabs on the left-hand side of the page to review the different areas available to you as a Fund Advisor. As a reminder, depending on the type of fund that you manage at the JFFNF, not all the following tab selections may be available to you.

For reference, here is what the tab selections may look like on your screen:

Left Side Navigation Tab Overview

The **Fund Summary** tab provides the fund's current balance, total grants and contributions.

The **Donations/Contributions** tab allows you to view a list of donations to your fund.

The **Grant Summary** tab provides details on all grants distributed from the fund.

- **Grant summary** which lists total cumulative grants by grantee.
- **Grant History** lists each individual grant made from the fund, starting with the most recent.
- **Recurring Grants** lists any recurring grants associated with the fund

The **Grant Status** tab will allows you to view recent grant request and their status (Request, Paid, Complete, etc)

The **Resources & Documents** tab is available to review fund statements.

The **Donate** tab allows you to contribute via credit or debit card to any listed funds at the JFFNF and your own fund. By clicking this tab, you will be redirected to our Giving Hub webpage and invited to make a selection to donate to one of the funds listed.

Create Grant Request Tab

To request a grant, first select the Create Grant Request button in the top right corner, then select from one of the following three options to proceed in your grantmaking request.

Previous Grantee or Fund

This will give you the option to choose from a grantee you have given to in the past, a Foundation fund you have given to in the past, or other JFFNF funds you might want to support.

Choose from previous Grantees or Funds

Grantees you have given to in the past

Other foundation funds

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 as well as Candid for organizations containing the keywords that you've selected. (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 JFFNF's database and then Candid.

Search for Grantees

Grantee Name

City State

EIN

SEARCH

Please note that this tool does not automatically guarantee that an organization will pass the Foundation's due diligence, that procedure will still take place during processing.

Enter a Grantee Manually

This selection allows you to enter nonprofit or grantee details manually. You will need to enter the name of the grantee, an address, zip code, and a phone number to move the grant request to the Foundation's staff for due diligence.

Enter Grantee information manually

Grantee Name *

Street Address * Apartment, Suite, Building, other

City * State * Zipcode *

Email Phone

EIN

* These fields are required.

SUBMIT

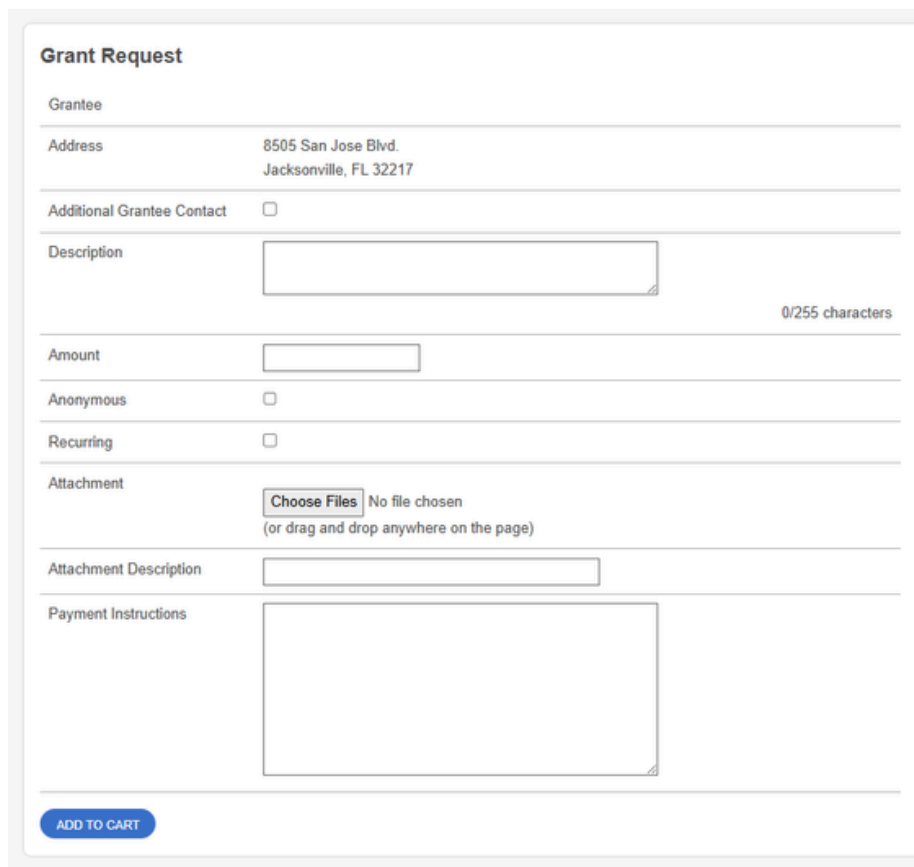
Follow the prompts to complete the grant request submission.

Once you have completed all steps click “Add to Cart.”

If you would like to make another distribution request, use the tab “Create Grant Request” and proceed with the second request.

Once all requests have been completed, click the “Review Grant Requests” in the dark blue block at the top of the webpage. This page will show you a list of all Grant Requests. Once you have reviewed, click the “Submit Grant Requests” at the bottom of the list.

You will be directed to a Grant list page that will show the grant status. At this point, the Foundation staff will be alerted to your request(s), and processing will start on our end. You can log back in and check the status of a grant at any time.

A screenshot of a web form titled "Grant Request". The form contains several fields: "Grantee" (text input), "Address" (text input with pre-filled text "8505 San Jose Blvd. Jacksonville, FL 32217"), "Additional Grantee Contact" (checkbox), "Description" (text area with a character count "0/255 characters"), "Amount" (text input), "Anonymous" (checkbox), "Recurring" (checkbox), "Attachment" (file upload button "Choose Files" and text "No file chosen (or drag and drop anywhere on the page)"), "Attachment Description" (text input), and "Payment Instructions" (text area). At the bottom left of the form is a blue button labeled "ADD TO CART".

The description box can be left blank but if the grant is for a specific program or for a specific use, please indicate in that section.

If you need additional assistance or have any questions, please contact Sara M. Wagoner, Foundation Program Specialist, at 904-659-2806 or by emailing saraw@jewishjacksonville.org.