Fund Portal User Guide





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Overview ······

As a fund holder of the Wichita Foundation, you have the ability to access your fund information online through our *Fund Portal*.

Depending on your fund access level, within the portal, you can easily check your fund balance, view and download fund statements, request and track grants (for Donor Advised Funds only), add to your fund, and more. The Fund Portal makes it easy to manage your fund and is available 24/7 from anywhere, on any device.

Logging In



- Go to the Wichita Foundation website homepage (<u>www.wichitafoundation.org</u>).
- Click on 'Fund Holder Login' at the top right.
- Enter your email address and password to access your *Fund Management* page.



Navigating the Fund Management Page

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- View your fund's activity on the *Fund Summary* page.
- Check your current balance, spendable balance (for endowed funds only), total contributions, and total grants sent.



Exploring the Fund Summary Tab

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• Switch between multiple funds by clicking on the fund name.



- View graphs of top donors and top grantees.
- Adjust date ranges for viewing fund activity on the graphs by clicking on the dates.



Contributions Tab

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• View history of all donations made to your fund.

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• Click on the ID number for donation details or contributor name for contact information.

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• Filter donations by specific dates or export data to Excel.



Grants Tab

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Grant Summary Page

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		Family, Promise of Greater Workla	2	16.290.00	
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		Guadalupe Citere, Inc.	8	12,750.00	
		Guadalupe Health Foundation	1	409.00	
		HumanKind Ministries	2	2,250.00	
		Interfund Transfer	9	5.377.00	

• View grants sent from your fund in an alphabetical list by organization name.

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	East Heights United Methodist Church	2	1.870.24	
	Family Promise of Oreater Wishits Inc.	9	10,250.00	
	First United Methodist Church - Jupiter Florida	2	1.879.34	
	Guadalupe Clinic, Inc.	5	12,350.00	
	Gendelope Health Foundation	1	489.00	
	HumanKind Ministries	2	2,290.09	
	Interfund Thatofer	9	6.377.00	
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• Click on an organization name to see all grants sent to that specific organization.

Grant History Page

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			40963	12/01/2024	complete	Unice Rescue Mission, Inc.	0VC Fund	general support	Sample, ML Sally	3,000.00	CORY	

- Access grant history in date order and filter by date range.
- You can view the status of each of your past grant requests on this page.

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• Click on the ID number to view the grant details.

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Ph. 116 244 450							~ 1 6	s in	2

• Under *Payment Schedule*, you can see the date your grant was paid by looking at the Voucher date.

Recurring Grants Page

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• Under *Recurring Grants*, you can see all recurring grants you have set for your fund.

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• Click on the ID to view the details of your recurring grant.

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				Amount	683.00		
				Remaining Amount	4,680.00		
			Grants	GrantiD	Grant Date	Amount	
			Created	41524	0916/0025	500.00	

• From the details page, you have the option to *Edit* your recurring grant or you can *Cancel* your recurring grant.



Managing Grant Requests

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				03/18/2025	Request	Guadatepe Health Poundation	general purposes	800.00	CANCEL			
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				05/18/2025	Pending	Family Promise	general purposes	500.00				

• View pending requests and recent grant statuses through the *Grant Requests* tab.



Creating a New Grant Request

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• Click on Create Grant Request.

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	Wichita Foundation 303-5. Smoolway, Salte 100, Wichita, NS 6729 Ph: 116.264.4880	× f ⊚ in □

• Choose to send to a previous grantee, search for a grantee, or manually input grantee information.

Sending to a Previous Grantee

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		ff you know any questions, contact Meghan at meghan@wichtateundation.org.
		Grant Request + Onorea Type + Search
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	Ph: 346.264.4880	

- Click on Previous Grantee.
- Select from the list of previous grantees by clicking on the box under 'Grantees you have given to in the past.'

Grant Reques	t		
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Primary Contact	J.W. Johnston		
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Complete the grant request form with:

Description

This is the purpose of the grant, (i.e. general purposes, specific program, etc). Information that is entered in the description area is what is sent in the grant letter to the organization letting them know what this grant is to be used for.

Amount

Enter the dollar amount of the grant you would like sent.

Anonymous

Check this box if you would like your grant to be sent anonymously.

Recurring

Check this box if you would like to create a recurring grant. Once you click the box, additional options will appear to set the recurrence start date, recurrence interval and number of times you would like the recurring grant to occur.

Attachment

If you have any documents you would like to attach to this grant request, you may do that here.

Attachment Description

The description of the items you have attached.

Special Instructions

Use this area to relay any information to Wichita Foundation staff regarding your grant request. All information entered only goes to WF Staff and is not shared with the organization you are sending the grant to.

• Once you have completed the grant request form, click the *Add to Cart* button.



- Under the *Grant Request Cart* section, ensure your grant information looks correct. If you need to make a change, click *'Edit'* to make changes.
- If your grant information looks correct, click 'Review Grant Requests.'

C Dobrot Languago 1 Y	acad. P you I	have any questions, conta Grant Request C	ot Mephon et meph				
		Grantee Guadange Cinic, Inc.	Description	Attachment	Amount Anonymous \$ 200.00 Tro		
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	Michita Fauscation 2015 Deserver, Guite 101, Webba K3 67292 Ph. 216 254 4550				× f @) in 0	

• Review your grant information one final time, then click 'Submit Grant Requests,' and then click the 'Continue' button on the next page.

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		Grants						
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		Denseller	Approved	Family Promise	peneral purposes	\$30.03		
			Roquest	Wichts Inc.				
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		85/18/2025	Request	Ocadatupe Health Foundation	general purposes	500.00	CANCEL	
		80/18/2025	Request	Guadalupe Olinic, Inc.	lent	250.00	LANCEL	
		85/18/2025	Pending	Family Promise of Greater Wichita Inc.	peneral purposes	530.00		
		80/18/2025	Request	Ouedelope Health Fouedelon	peneral purposes	530.00	CARGES.	
		85/13/2025	Request	Family Promise of Greater Wichita Inc.	New.	250.00	CANCEL	
		0005/2025	Pending	Human/Kind Ministries	lest.	250.00		
		8205/2025	Approved	Family Promise of Greater	le ni	250.00		

- You will be able to see the grant request you just submitted.
- Any grant request with the status of 'Request' will allow you to cancel that request by click on the 'Cancel' button next to the request.

Sending a Grant Request by Searching for a Grantee

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	We do have grant rank wath month, phases have your grant requests in no tatler than the TBM-day of the month to be processed for that same recents.
	If you have any questions, contact Meghan at meghan@wichtarbundation.org.
	Grant Respect > Choose Type
Wichita Foundation IEES, Providence Solidi 12	
Ph 316 364 4800	

• Use the 'Search Grantee' option to find organizations by name or EIN.

G Select Language *	034470	
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		We do (see grand news each month, plasse have your grant requests in no later than the Trid-day of the month to be processed for that same south.
		If you have any questions, contact Meghan at meghangeworkstatundation.org.
		Grant Request > Choose Type > Search
		Search for Grantees Vicinita Foundation
	Wichita Foundation 303 S. Browlwey, Suite 190, Wichita.	states X f @ in D
	Ph: 116 264 4810	

• Type in the name of the organization you would like to find and click 'Search.'

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(Search Results fo	(Wichita Foundatio		EN ALANAGA	

Search results:

Wichita Foundation Results

The list of organizations already in the Wichita Foundation database.

Candid Results

The full list of registered organizations related to the name you put in the search.

Once you find the correct organization, click on '*Create Request*' next to the organization's name.

• Complete the Grant Request form using the same steps as those under 'Sending a grant to a Previous Grantee.'

Sending a Grant Request by Manually Entering Grantee Information

G Seid Language Y	
FUND TUM	T DVC Fund -
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SKATS SKATS	Rendeder: The minimum amount of a grant request is \$258 and we require all funds to have a minimum fund balance of \$15,000. Phone keep this location of any or make grant requests.
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• Select 'Manual Grantee' option.

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- Fill in all required fields and submit.
- Complete the Grant Request form using the same steps as those under 'Sending a grant to a Previous Grantee.'



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Accessing Resources and Documents

• Find fund statements and related files in the *Resources and Documents* tab.

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• Under the '*Statements*' page, you can view all past fund statements. To open a fund statement, click 'view' next to the statement and a PDF of your fund statement will open.

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- Under the 'Files' page, you can find items, like your fund agreement along with tutorial guides for the fund portal, Wichita Foundation policies, various gift transfer instructions and handbooks.
- Simply click on the filename to open the file.



Making a Donation

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	12/15/2025	WF Anti-Inde Funding Policy Ends.pdf	188° Anti-Hale Punding Policy PAGs
	12/20/2020	WF DAF Handbook.pdf	Donor Advised Fund Handbook
	12/13/2024	WF Stack & Chesh Transfer Instructions.pdf	INF Stock & Check Transfer Instructions

- Click on the '*Donate*' tab to access the donation page.
- From here, you can make an online donation to your fund or any other fund at the Wichita Foundation.

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• To make a donation, simply click on the donate button under your fund name and follow the steps to make an online donation.



Questions?

If you have any questions about the Fund Portal, contact our Director of Philanthropy.



Meghan Doyle Director of Philanthropy meghan@wichitafoundation.org 316-264-4880

Fund Portal Frequently Asked Questions

• How often are quarterly fund statements posted?

- Quarterly fund statements are posted the month immediately following the end of each quarter. You will be notified via email when your summary is ready to be viewed in the Fund Portal. If you are not receiving these notificiation emails, please contact our <u>Director of Philanthropy</u>.
- How do I change my password?
 - If you need to change your password, click on the *Forgot Password* link on the login page and reset your password.
- When are grant requests processed?
 - We do two grant runs each month. Any request received by the 15th day of the month will be processed and sent out that same month.
- Is there a minimum amount for grant requests?
 - The minimum amount of a grant request is \$250.
- Who can I make a grant to?
 - Grant requests must be made to 501©3 organizations (including schools, churches, and government entities).
- Are there other ways to submit a grant request?
 - Yes, requests may be submitted by email. Email <u>meghan@wichitafoundation.org</u> with your request. Please include the fund name, the name of the organization you would like to make the grant to, grant amount, grant purpose and any additional instruction in the email. Our Director of Philanthropy will email confirmation of the request.
- How do I know if a grant I requested has been issued?
 - You can find a list of your grants under the 'Grants' tab and then click on the 'Grant History' page. The status of each of your grant requests will show there and you may click on the ID number to view additional details of the grant request including the payment date.

• Who do I contact if I'm having issues with the Fund Portal?

 If you have any questions or are experiencing issues with the Fund Portal, please contact our Director of Philanthropy at <u>meghan@wichitafoundation.org</u> or 316 264 4880.