

Fund Portal User Guide



WICHITA
FOUNDATION

Updated March 2025



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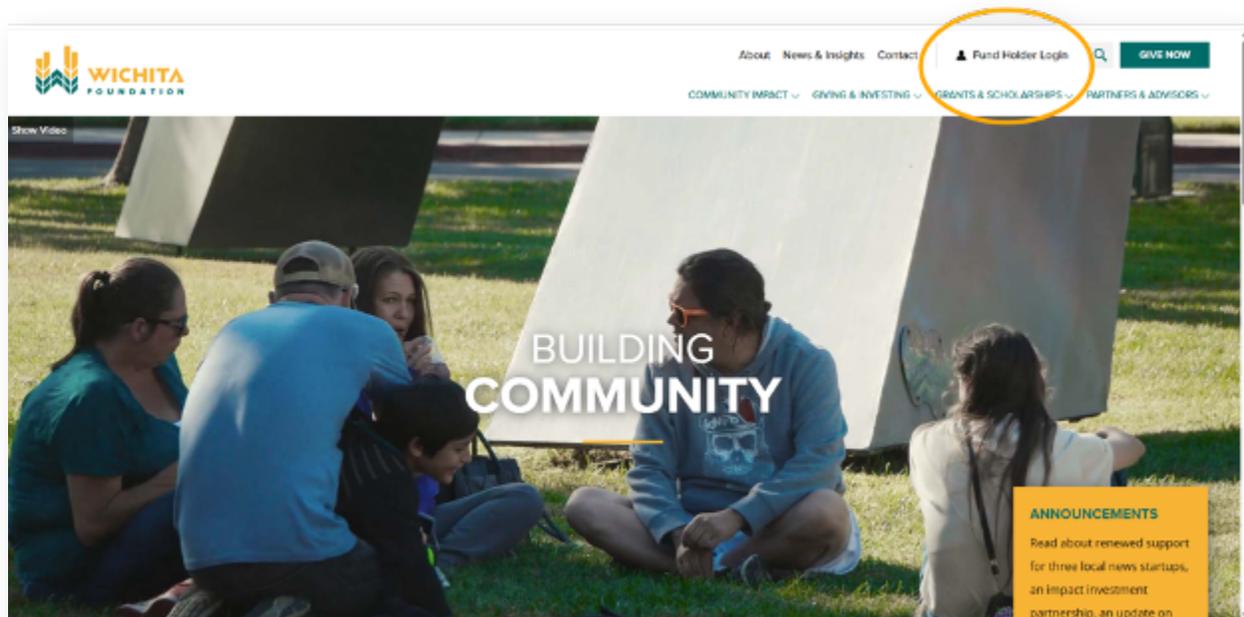


Overview

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.

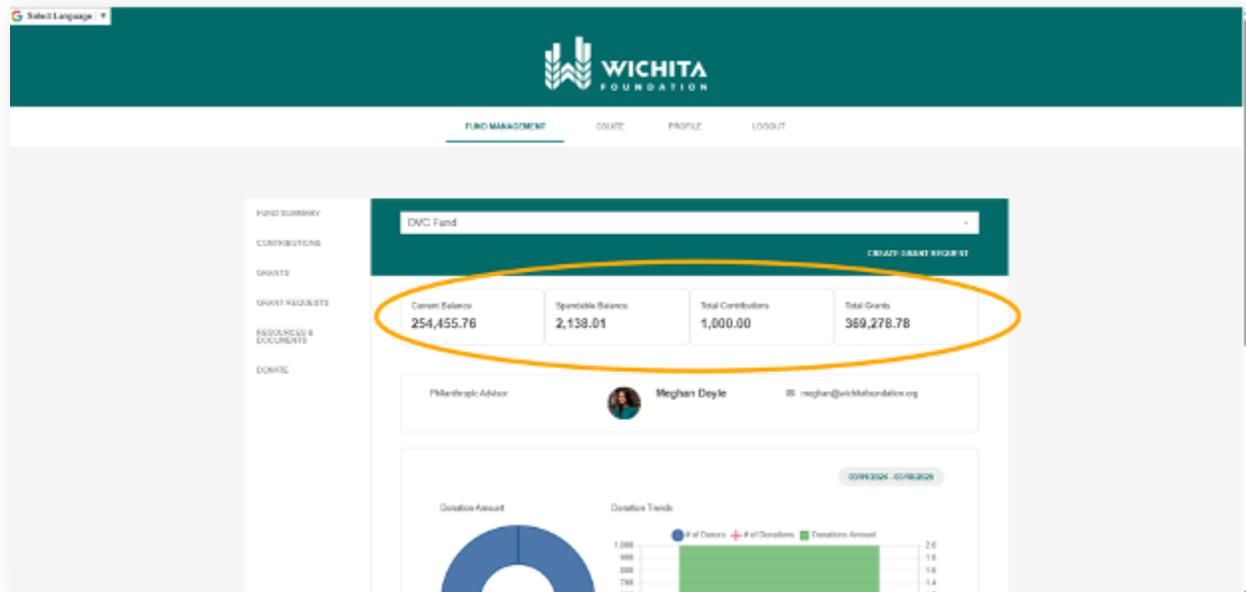
Logging In



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



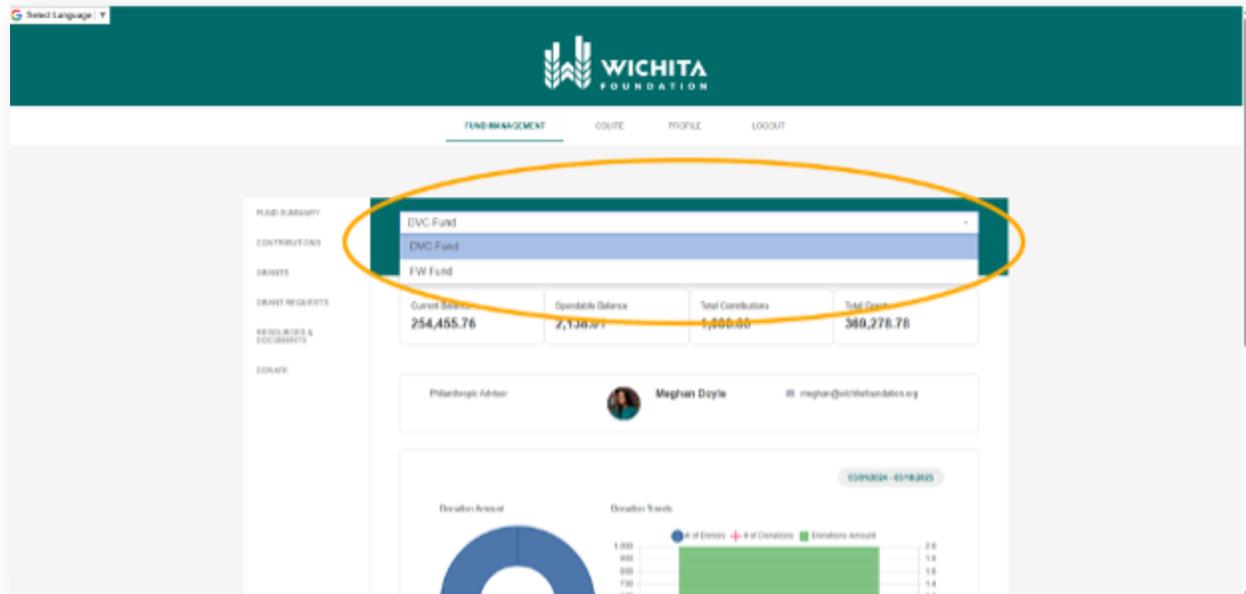
Navigating the Fund Management Page



- 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



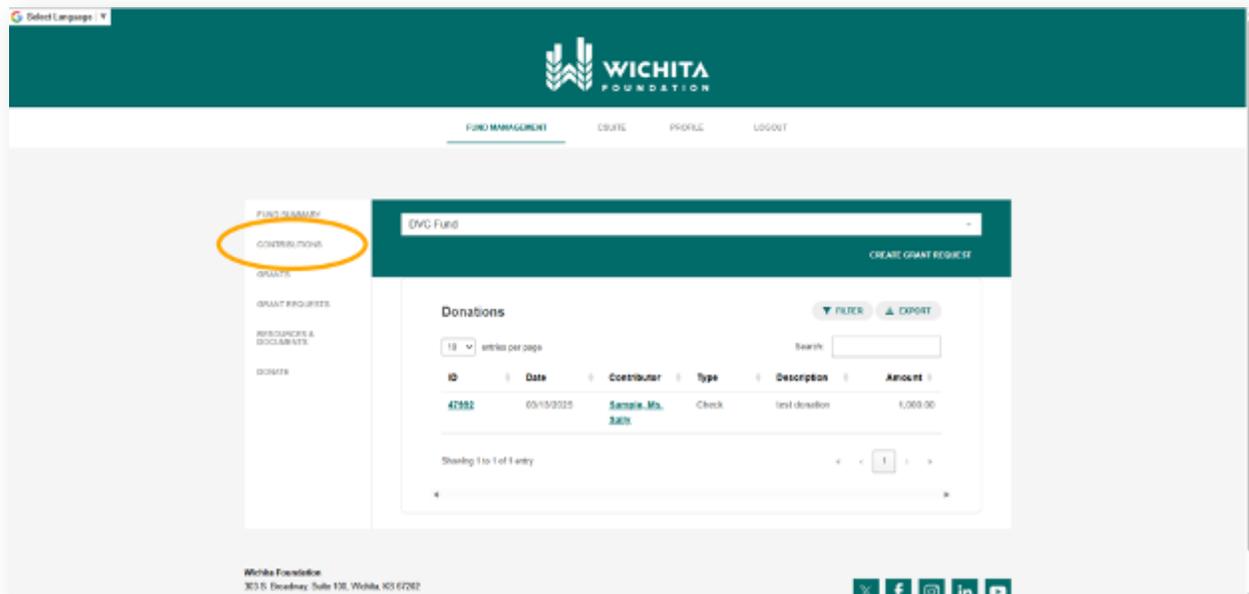
- Switch between multiple funds by clicking on the fund name.



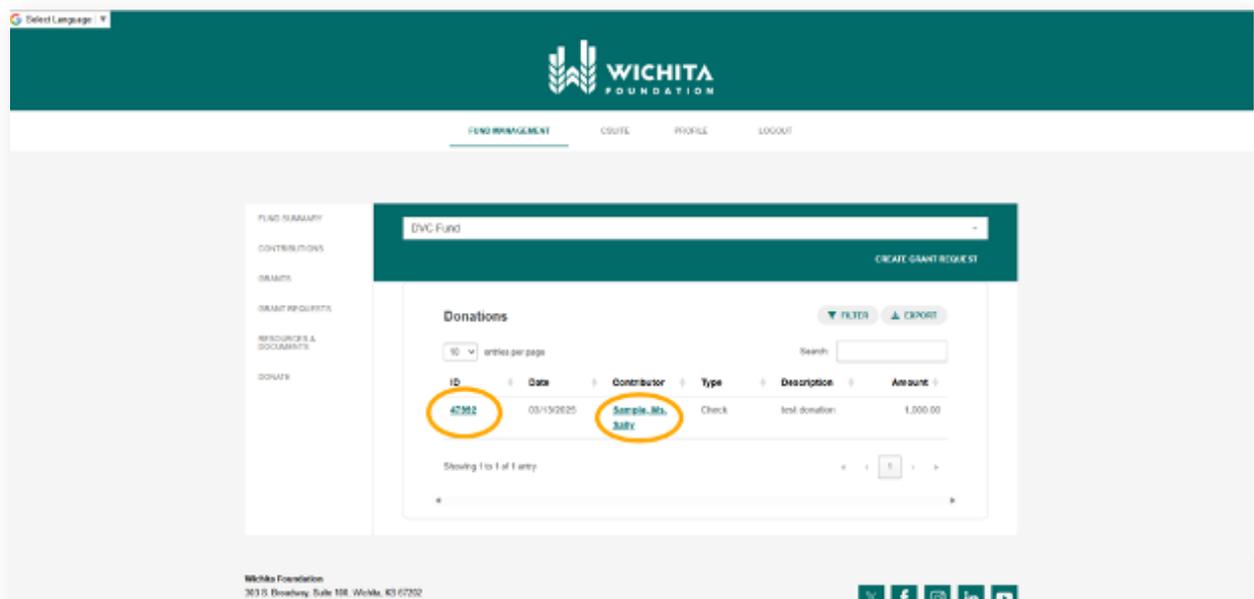
- View graphs of top donors and top grantees.
- Adjust date ranges for viewing fund activity on the graphs by clicking on the dates.



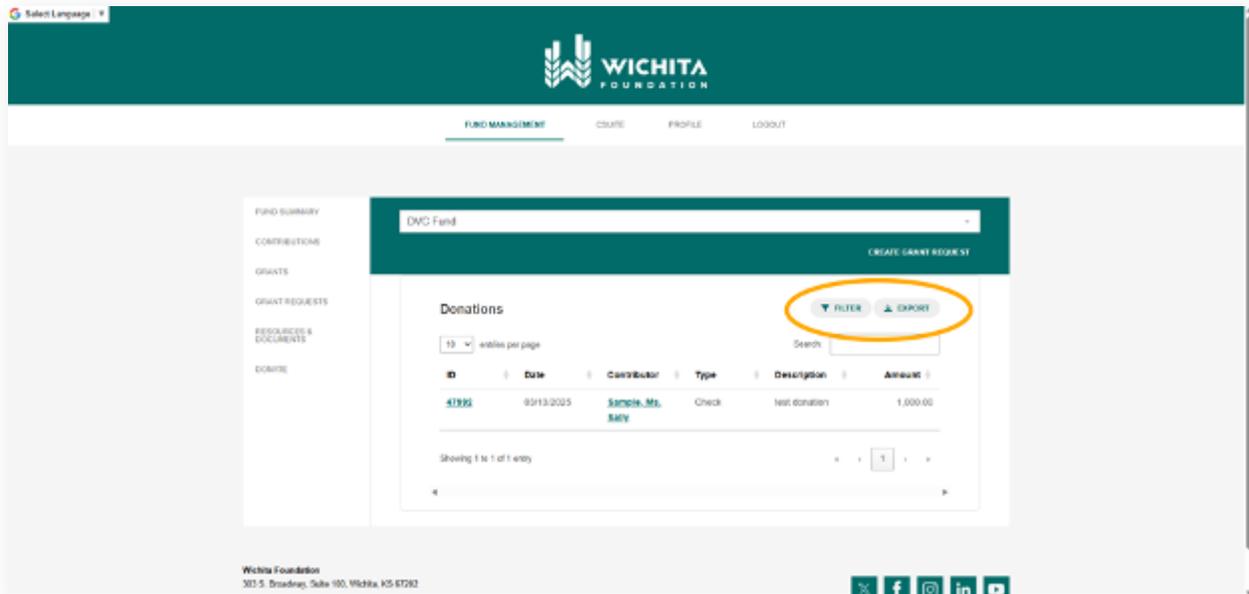
Contributions Tab



- View history of all donations made to your fund.



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



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



Grants Tab

The screenshot shows the 'Grants' tab selected in the left-hand navigation menu. The main content area displays a 'Grant Summary' table for the 'DVC Fund'. The table lists various organizations and the amount of grants sent to them.

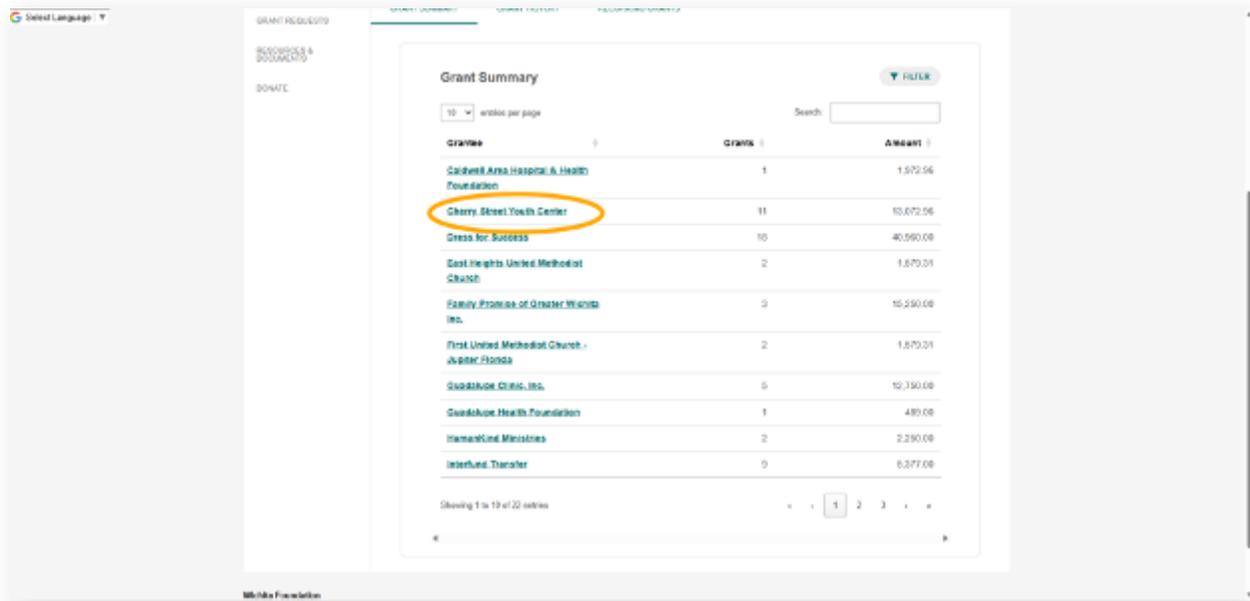
Grants	Grants	Amount
Caldwell Area Hospital & Health Foundation	1	1,072.96
Cherry Street Youth Center	11	13,072.96
Dream for Success	10	40,960.00
East Heights United Methodist Church	2	1,579.31
Family Promise of Greater Wichita	5	15,250.00

Grant Summary Page

The screenshot shows the 'Grant Summary' page selected in the left-hand navigation menu. The main content area displays a 'Grant Summary' table for the 'DVC Fund'. The table lists various organizations and the amount of grants sent to them.

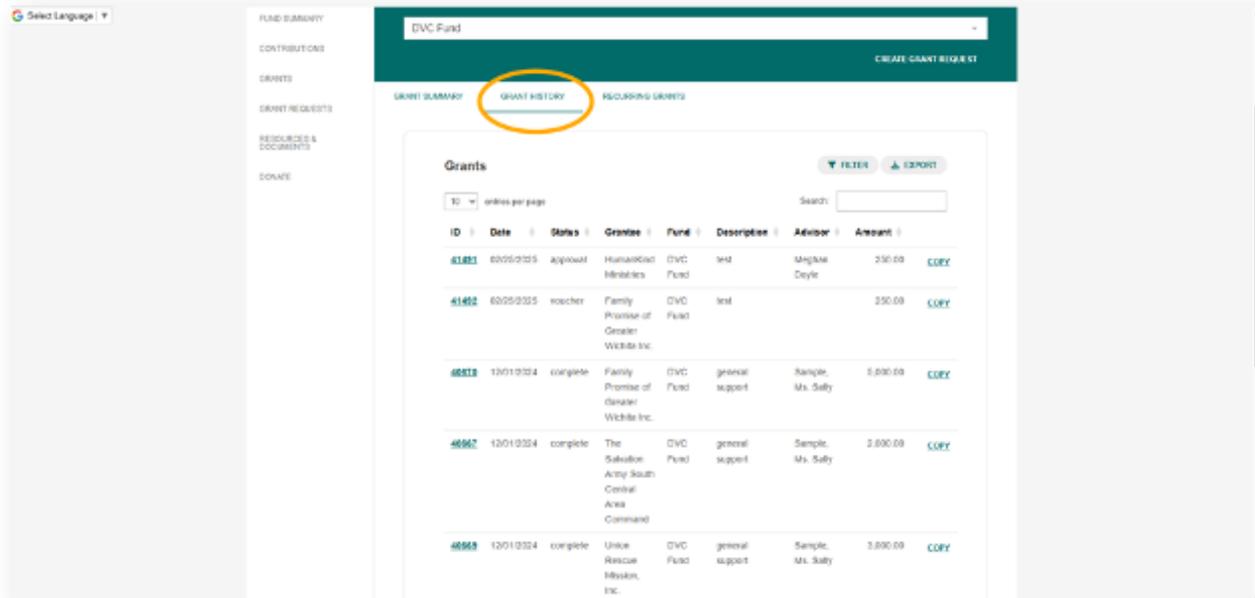
Grants	Grants	Amount
Caldwell Area Hospital & Health Foundation	1	1,072.96
Cherry Street Youth Center	11	13,072.96
Dream for Success	10	40,960.00
East Heights United Methodist Church	2	1,579.31
Family Promise of Greater Wichita ISL	3	15,250.00
First United Methodist Church - Jupiter, Florida	2	1,579.31
Goodman Clinic, Inc.	6	12,750.00
Guidance Health Foundation	1	400.00
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.



- Click on an organization name to see all grants sent to that specific organization.

Grant History Page



- 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.

Grants

ID	Date	Status	Grantee	Fund	Description	Advisor	Amount	
40481	03/25/2025	approval	HumanKind Muscles	DVC Fund	test	Meghan Dwyer	250.00	COPY
40482	03/25/2025	voucher	Family Promote of Growth Wichita Inc.	DVC Fund	test		350.00	COPY
40470	12/01/2024	complete	Family Promote of Growth Wichita Inc.	DVC Fund	general support	Sample, Ms. Sally	5,000.00	COPY
40487	12/01/2024	complete	The Salvation Army South Central Area Command	DVC Fund	general support	Sample, Ms. Sally	2,000.00	COPY
40489	12/01/2024	complete	Union Rescue Mission, Inc.	DVC Fund	general support	Sample, Ms. Sally	5,000.00	COPY

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

Grant ID: 40482

Grant Date: 01/09/2024

Recipient: Union Rescue Mission, Inc.

Status: complete

Fund: DVC Fund

Amount: 5,000.00

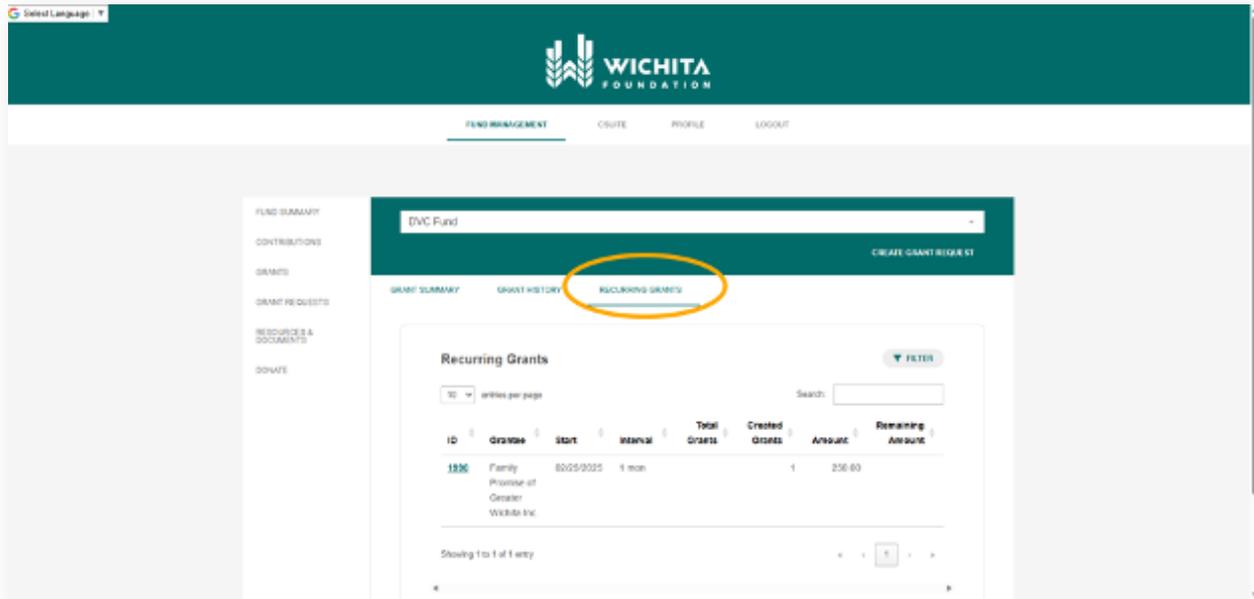
Description: for general support

Advisor: Sample, Ms. Sally

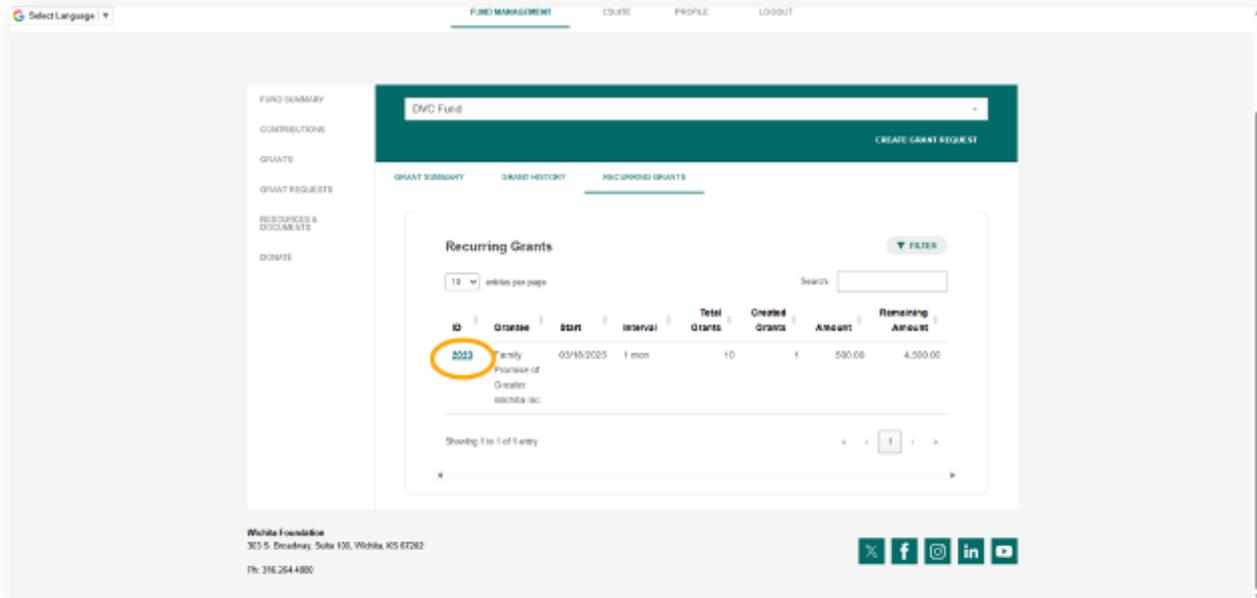
Payment Schedule	Payment Date	Amount	Voucher Date	Voucher Status
	01/09/2024	5,000.00	03/05/2024	paid

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

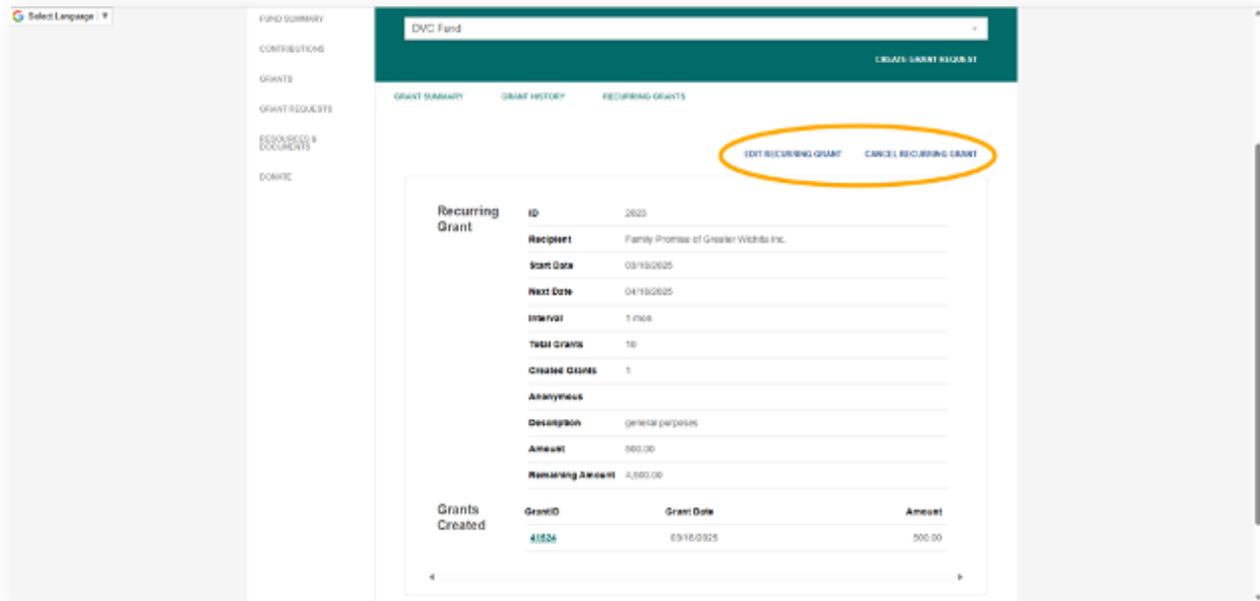
Recurring Grants Page



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



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



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



Managing Grant Requests

GRANT REQUESTS

Reminder! The minimum amount of a grant request is \$250 and we require all funds to have a minimum fund balance of \$1,000. Please keep this in mind as you make grant requests.

To submit a grant request, click "Create Grant Request" on the top right. Use this form to request a grant from your fund.

You have three options to select a grantee:

1. Search for a grantee you have used to be paid by selecting "Previous Grantee"
2. Search for a grantee in our database by selecting "Search Grantee"
3. Manually entering a grantee by selecting "Manual Grantee"

Wichita Foundation will receive notification of your request and process your grant in a timely manner.

We do two grant runs each month, please have your grant requests in no later than the 15th day of the month to be processed for that same month.

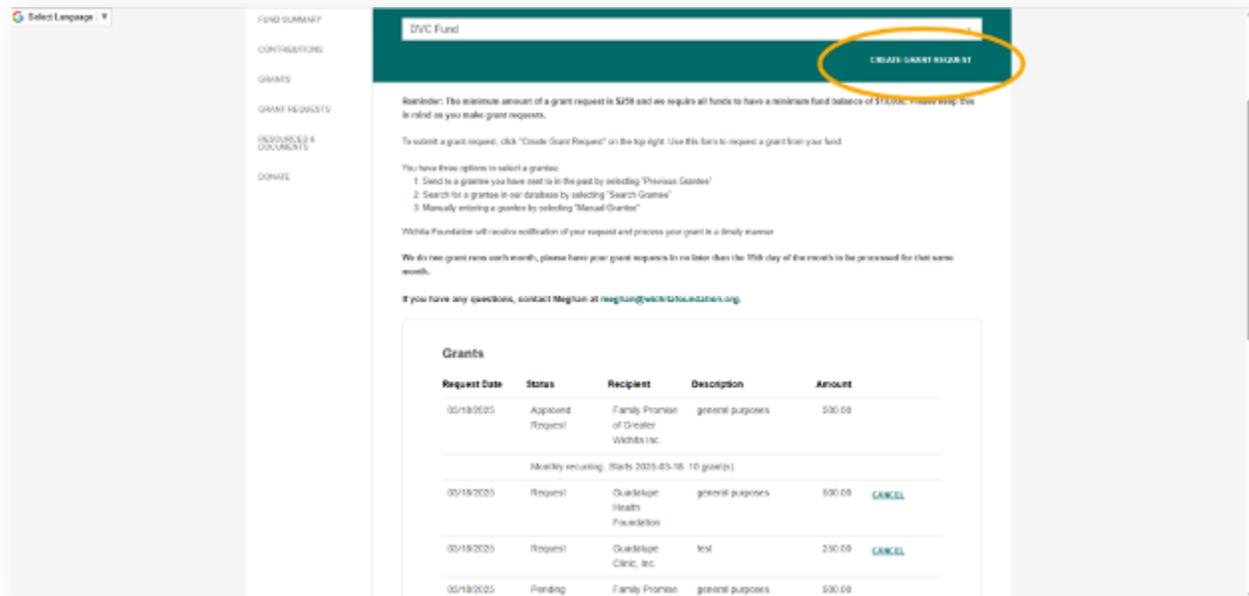
If you have any questions, contact Meghan at meghan@wichitafoundation.org.

Request Date	Status	Recipient	Description	Amount
03/18/2025	Approved Request	Family Promise of Greater Wichita Inc.	general purposes	500.00
Monthly recurring, Start: 2025-03-18, To: 2026-03-18				
03/18/2025	Request	Quakke Health Foundation	general purposes	500.00 CANCEL
03/18/2025	Request	Quakke Clinic, Inc.	rent	250.00 CANCEL
03/18/2025	Pending	Family Promise	general purposes	500.00

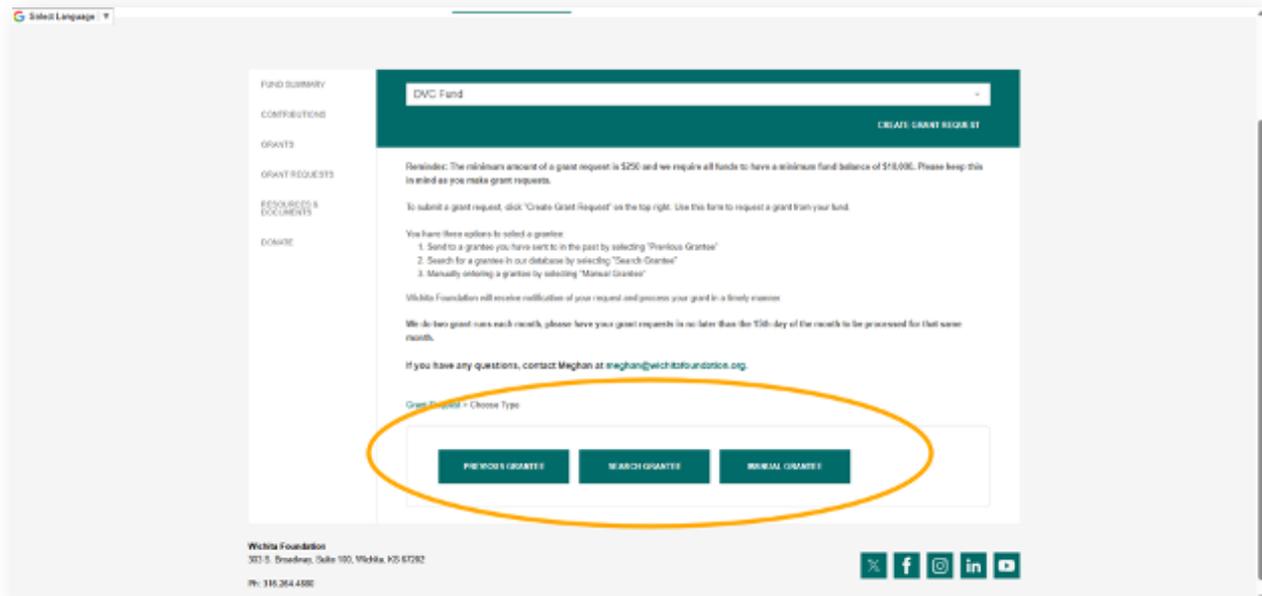
- View pending requests and recent grant statuses through the *Grant Requests* tab.



Creating a New Grant Request



- Click on *Create Grant Request*.



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

Sending to a Previous Grantee

The screenshot shows a web form for submitting grant requests. On the left is a navigation menu with links for GRANTS, GRANT REQUESTS, RESOURCES & DOCUMENTS, and DONATE. The main content area contains instructions and a form. A yellow oval highlights the 'Choose from previous Grantees or Funds' section, which includes a dropdown menu labeled 'grantees you have given to in the past' and another dropdown labeled 'Other Foundations/Funds'. Below the dropdowns is a search bar with a magnifying glass icon. At the bottom of the page, there is contact information for the Wichita Foundation and social media icons for Facebook, Instagram, LinkedIn, and YouTube.

- 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.’

- 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.

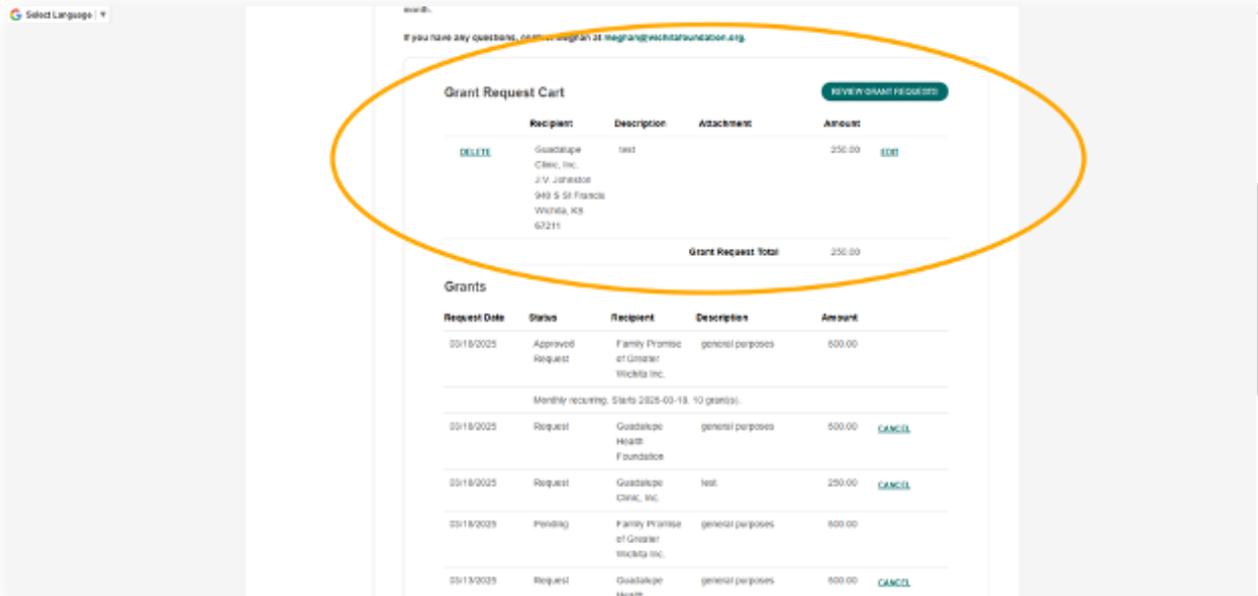
Attachment Description

The description of the items you have attached.

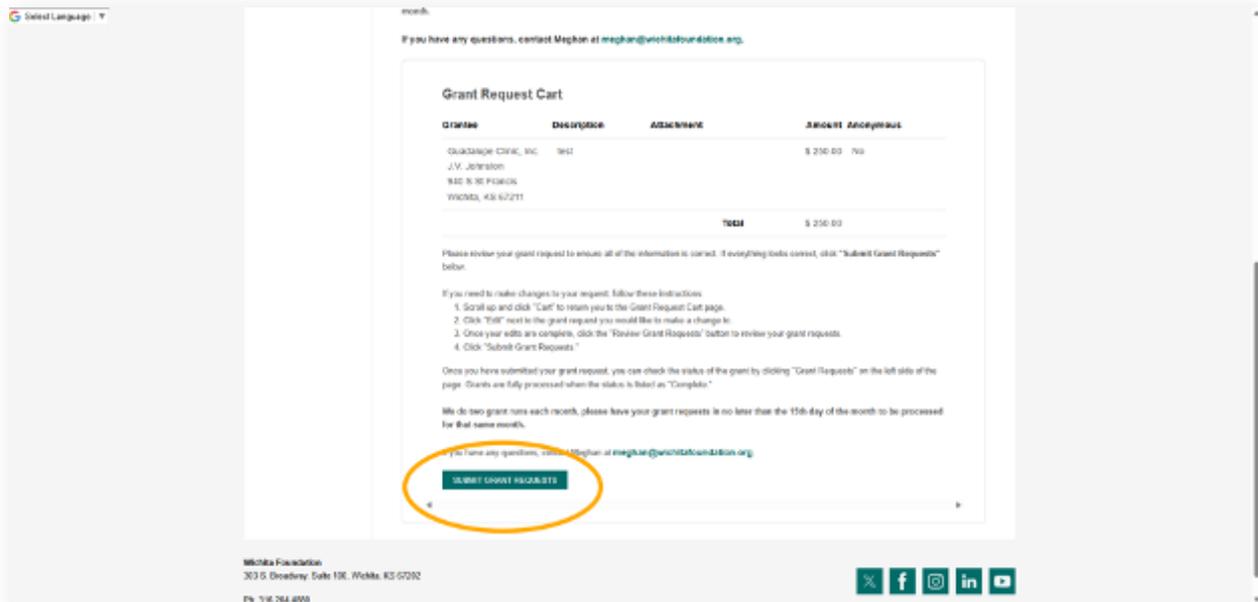
Special Instructions

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.*’



- Review your grant information one final time, then click ‘*Submit Grant Requests,*’ and then click the ‘*Continue*’ button on the next page.

Select Language | ▼

en_US

If you have any questions, contact Meghan at meghan@wichitafoundation.org.

Grants

Request Date	Status	Recipient	Description	Amount	
03/18/2025	Request	Quakkege Clinic, Inc.	test	250.00	CANCEL
03/18/2025	Approved Request	Family Promise of Greater Wichita Inc.	general purposes	500.00	
Monthly recurring: (Starts 2025-03-18, 10 grants)					
03/18/2025	Request	Quakkege Health Foundation	general purposes	500.00	CANCEL
03/18/2025	Request	Quakkege Clinic, Inc.	test	250.00	CANCEL
03/18/2025	Pending	Family Promise of Greater Wichita Inc.	general purposes	500.00	
03/13/2025	Request	Quakkege Health Foundation	general purposes	500.00	CANCEL
03/13/2025	Request	Family Promise of Greater Wichita Inc.	test	250.00	CANCEL
02/03/2025	Pending	Harvest Ministries	test	250.00	
02/03/2025	Approved	Family Promise of Greater	test	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

Select Language | ▼

FUND SUMMARY

CONTRIBUTIONS

GRANTS

GRANT REQUESTS

RESOURCES & DOCUMENTS

DONATE

DVC Fund

CREATE GRANT REQUEST

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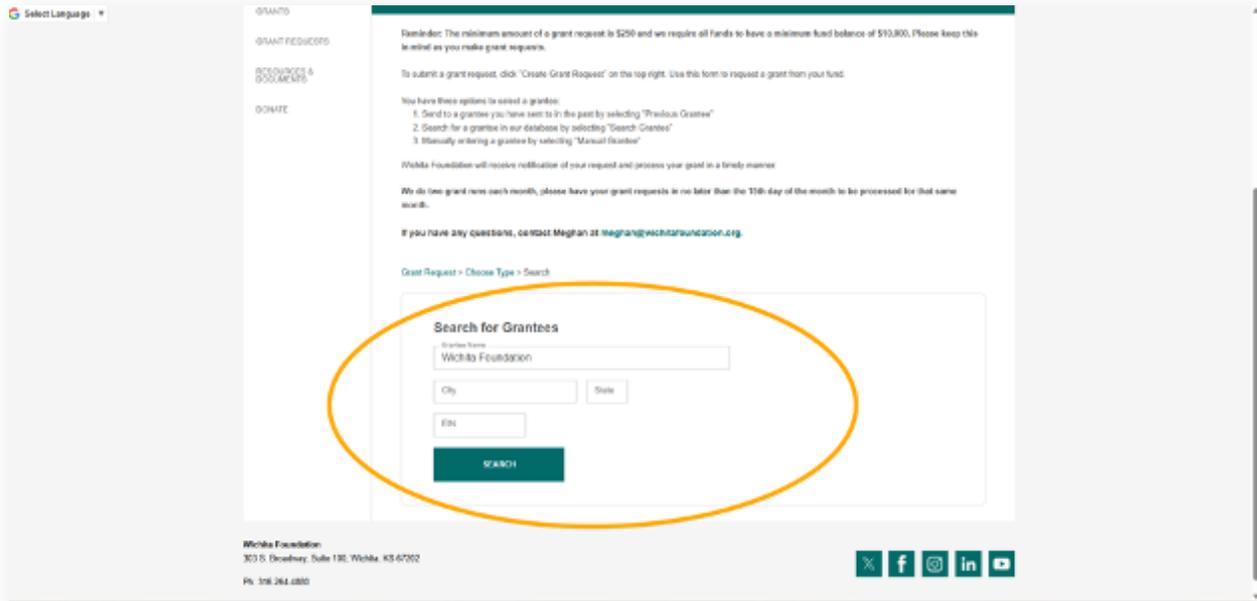
Grant Request - Choose Type

PREVIOUS GRANTEE | **SEARCH GRANTEE** | MANUAL GRANTEE

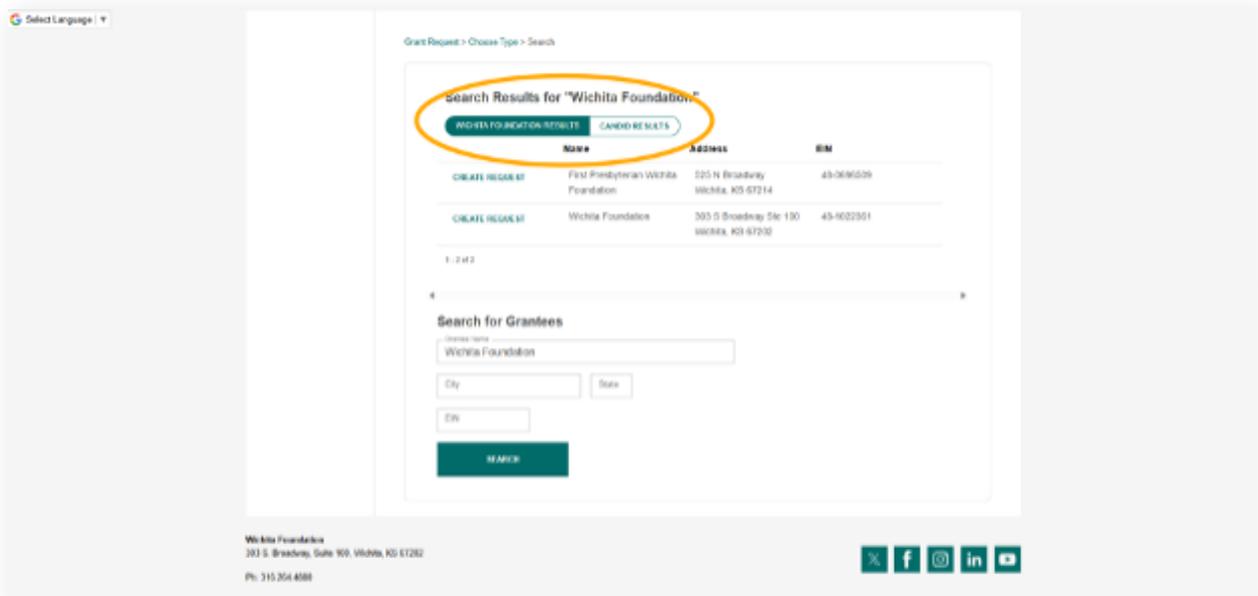
Wichita Foundation
303 S. Broadway, Suite 100, Wichita, KS 67202
Ph: 316.264.4880

Facebook | Instagram | LinkedIn | YouTube

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



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



- Search results:

Wichita Foundation Results

The list of organizations already in the Wichita Foundation database.

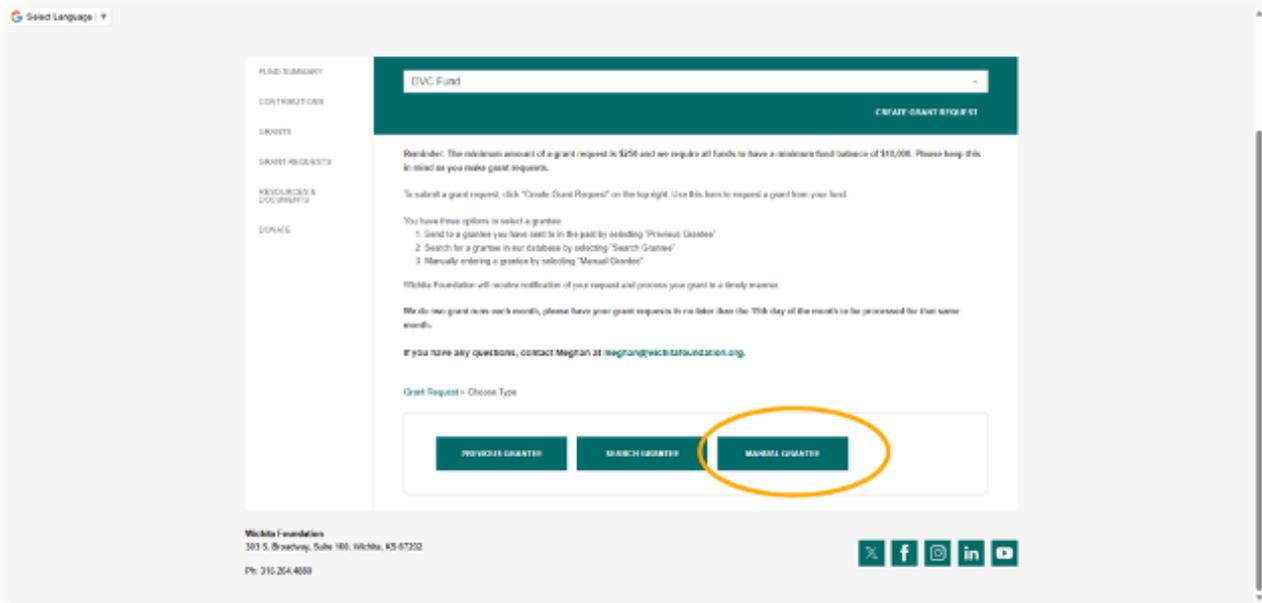
Candid Results

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

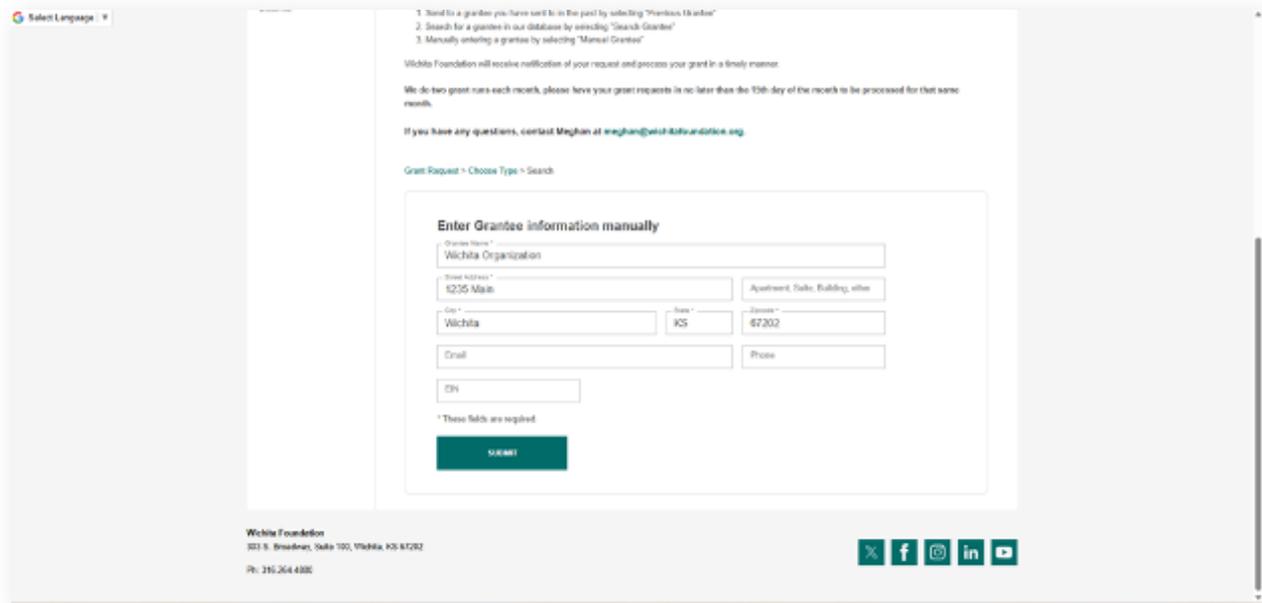
Once you find the correct organization, click on 'Create Request' next to the organization's name.

- 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



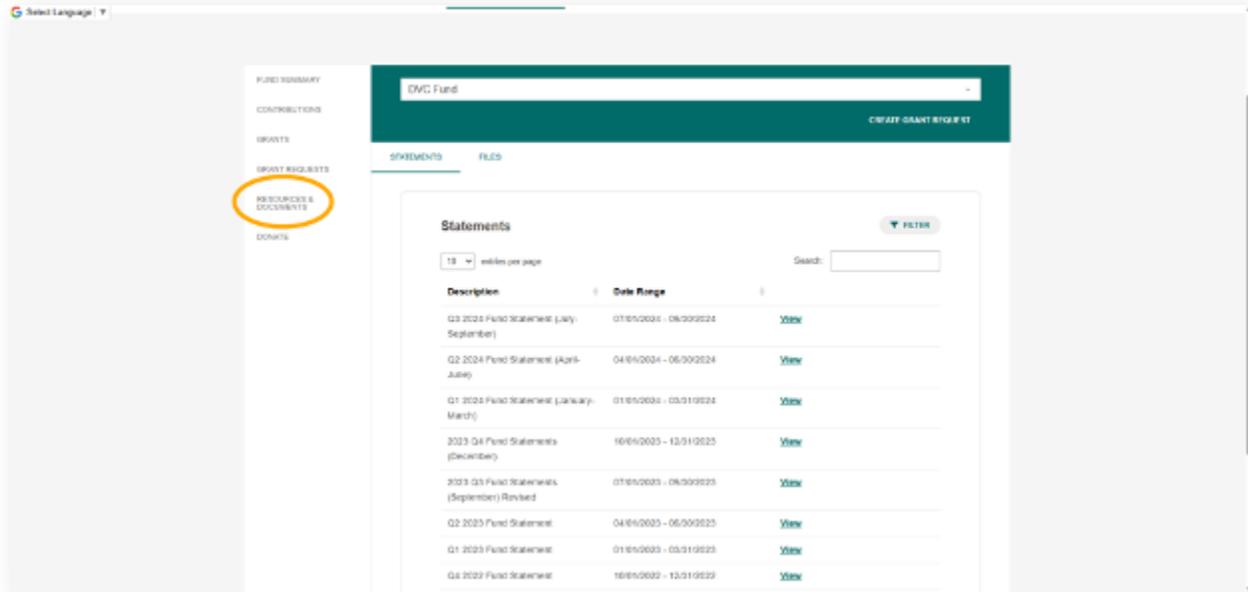
- Select 'Manual Grantee' option.



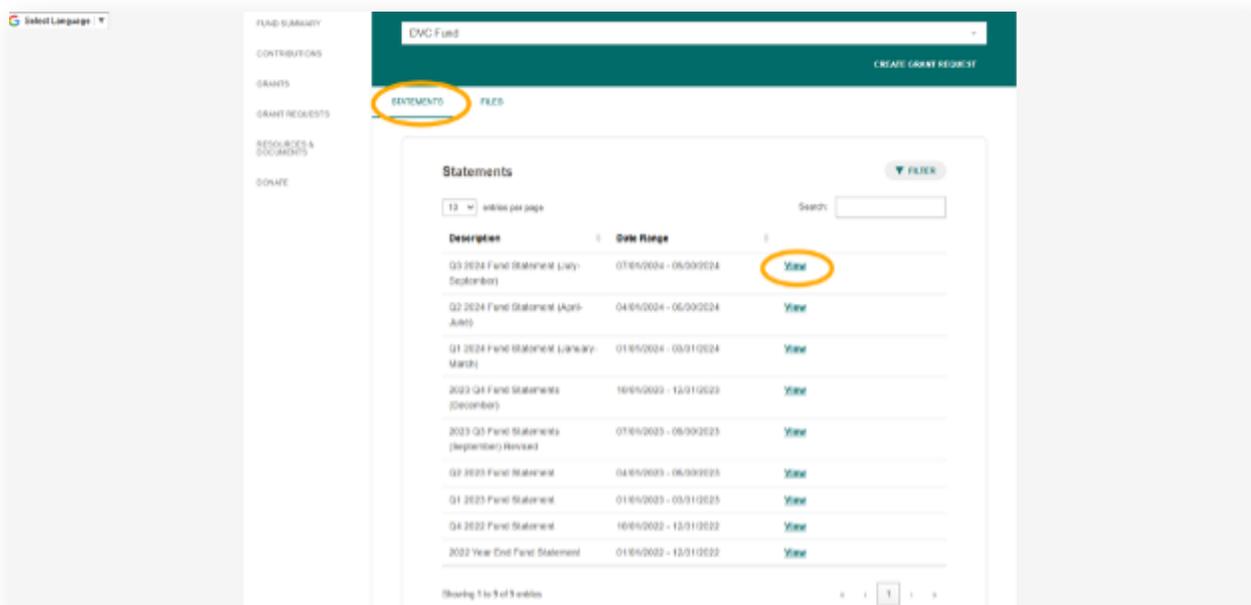
- Fill in all required fields and submit.
- Complete the Grant Request form using the same steps as those under 'Sending a grant to a Previous Grantee.'



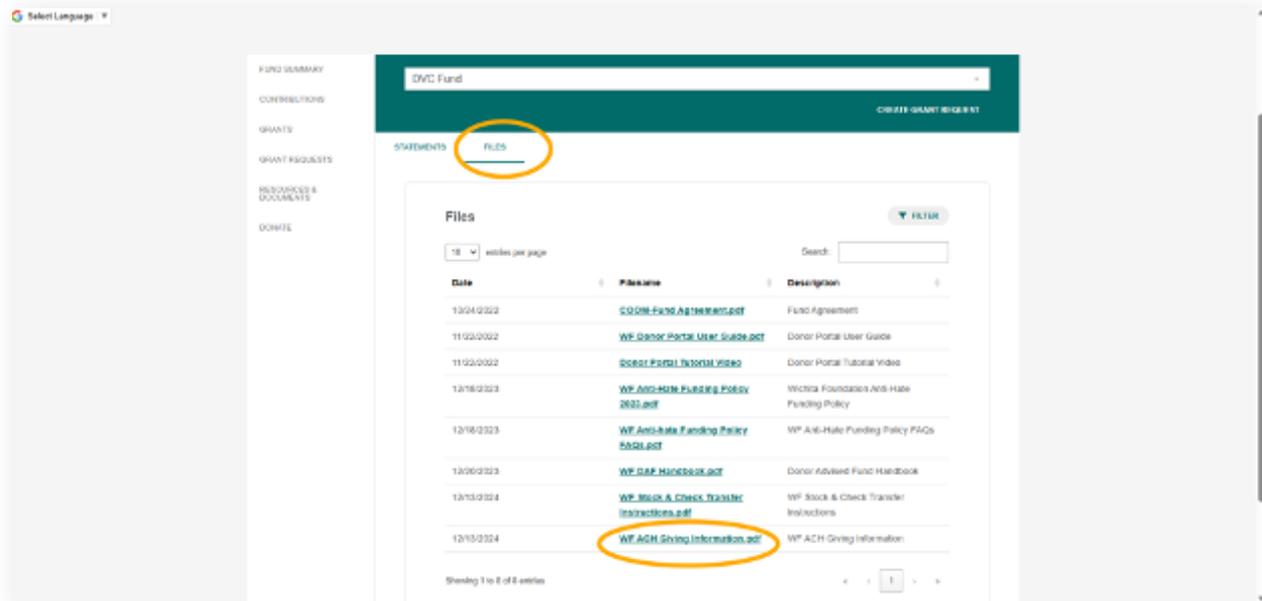
Accessing Resources and Documents



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



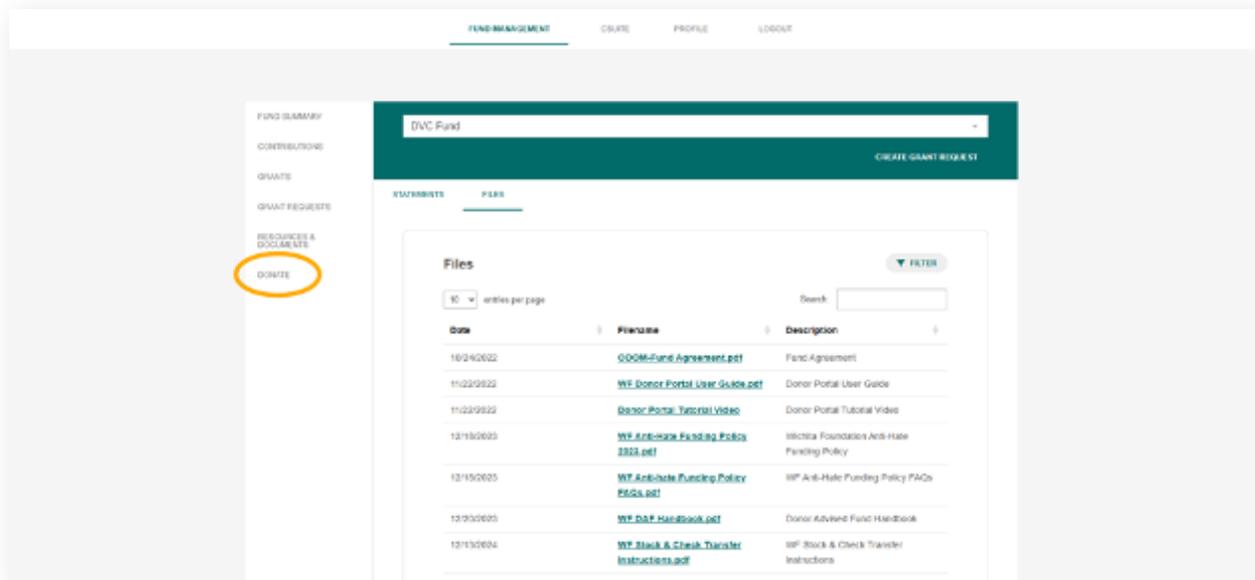
- Under the ‘*Statements*’ page, you can view all past fund statements. To open a fund statement, click ‘view’ next to the statement and a PDF of your fund statement will open.



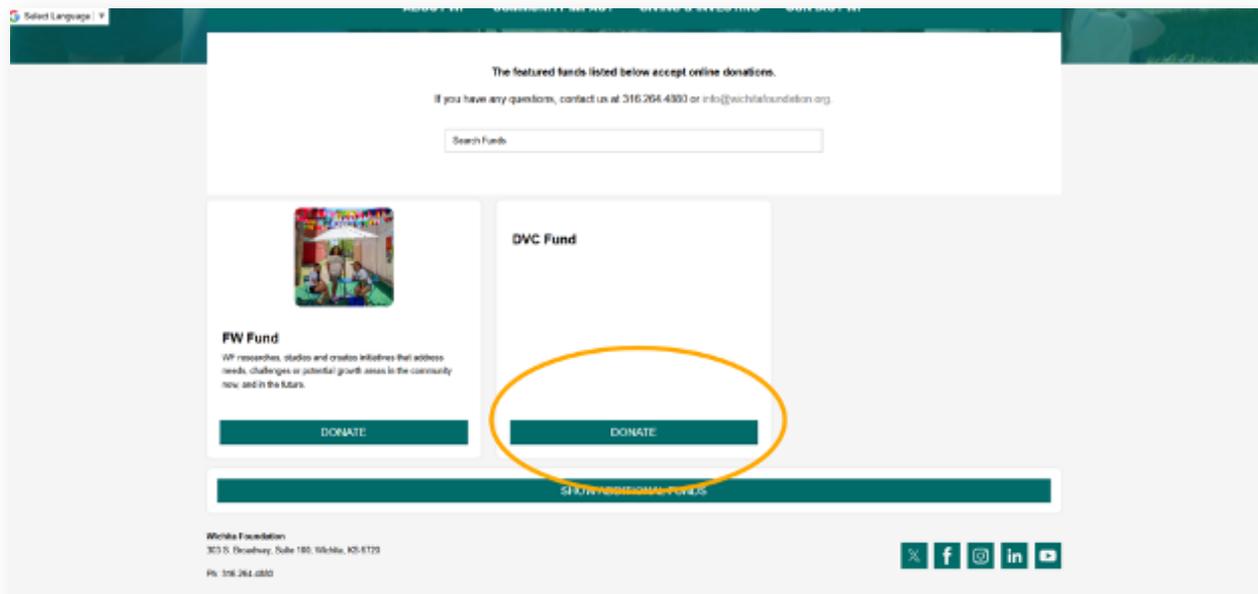
- Under the 'Files' page, you can find items, like your fund agreement along with tutorial guides for the fund portal, Wichita Foundation policies, various gift transfer instructions and handbooks.
- Simply click on the filename to open the file.



Making a Donation



- 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.



- 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 notification emails, please contact our [Director of Philanthropy](#).
- **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 meghan@wichitafoundation.org 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 meghan@wichitafoundation.org or 316 264 4880.