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FUNDHOLDER PORTAL HOW-TO

MyGiving is the Central New York Community Foundation's online fund management portal. This portal allows you to interact with your charitable funds via a secure, password-protected platform that's mobile-friendly and easy to use.

Please use this guide to create your MyGiving account. If you have questions please contact us at donorsupport@cnycf.org or **315-422-9538**.


YOUR ACCOUNT

As a fundholder, you can access your fund information online through our MyGiving portal. Within the portal, you can easily check your fund balance, view and download fund statements, request and track grants, add to your fund, and more. MyGiving makes it easy to manage your fund and is available 24/7 from anywhere, on any device.

INITIAL LOGIN PROCESS & SETTING UP YOUR ACCOUNT

Fund advisors will receive an email invitation to create a MyGiving account. The email contains a link to the portal and is sent to the primary email we have on record for you.

When you click on the link, you will be asked to enter your email address. Be sure to enter the address where you received the email invitation. The system will then send a PIN to that email address, which you can enter on the site to gain access to your account.

Once you are in your MyGiving account, click  **PROFILE** from the top menu.



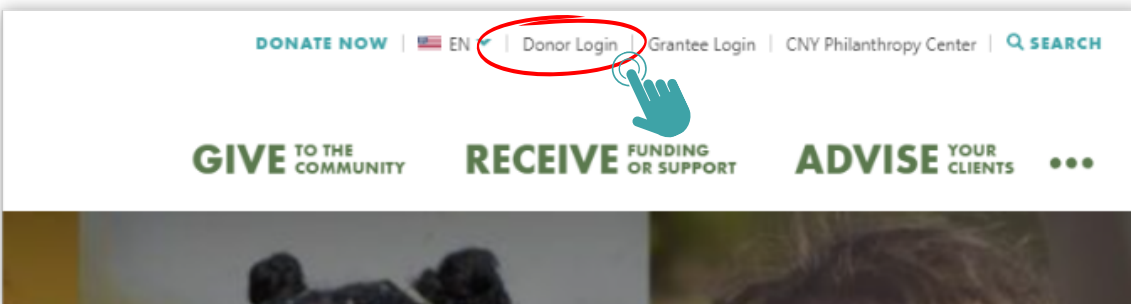
Then select **Security** from the side menu. From there, use **Change Username** and **Change Password** to set your login credentials. You can reset your username and password anytime by returning to the **Security** section of your account.

If you are not able to access the invitation, please email donorsupport@cnycf.org for assistance. We are happy to verify and/or update your primary email, and will send a new email invitation so you can create your account.

Once you create your MyGiving account, you will be able to log into the portal at anytime with your username and password.

RETURNING USERS

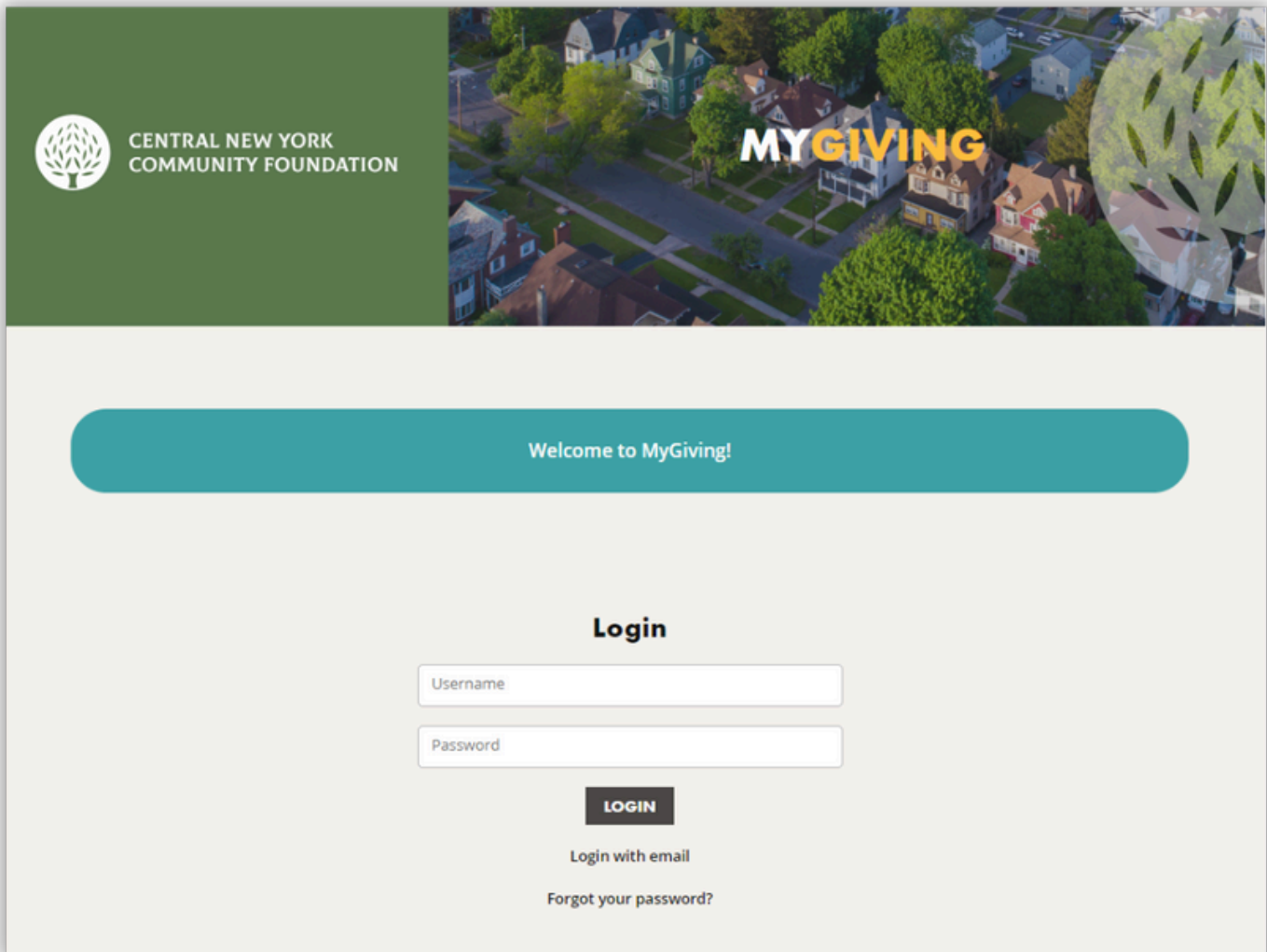
To access MyGiving, simply visit cnycf.org and click on **Donor Login** at the top of our homepage. The site can be accessed from any web browser or device (including smartphones and tablets).





RETURNING USERS CONT.

This will take you to the login screen where you will enter the username and password established when you created your account. To protect your security, CNYCF staff cannot access your password. If you forget your password, you can reset it by clicking [Forgot your password?](#) on the MyGiving login page. If you still need assistance, please contact us at donorsupport@cnycf.org or (315) 422.9538.

MyGiving will lock you out after five unsuccessful login attempts. If you are locked out, please contact our team at donorsupport@cnycf.org or (315) 422.9538.



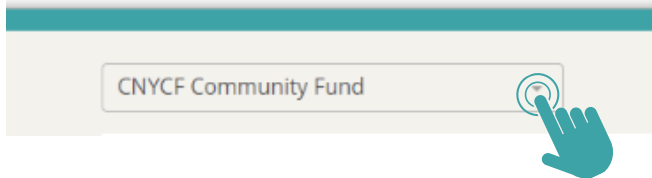
IMPORTANT: If you access MyGiving from a shared computer or device, we strongly encourage you to **use the Logout option after completing each session.** This ensures that no one else can access your account when you are finished.

To Logout, click on the  button. Then the  button.

PORTAL FEATURES

MY FUNDS

Once you are logged in, your fund's homepage will appear. If you manage multiple funds, you can choose which one you wish to review by clicking **Select** on the fund's tile. Continue to use the drop-down list to switch between multiple funds.



***** If you are listed as an advisor for only one fund, you will not have to select a fund but instead will see that one fund in your online account.**

Each fund's homepage will display your **Fund Summary**, with a current balance and high-level overview of your recent contributions and grants. From the Fund Summary section, you can use the menu on the left to navigate to more detailed information.



In the **Donations To My Fund** section, you can review recent contributions into your fund. If your fund accepts contributions from others, you will see the name of each donor who has made a gift to your fund, as well as their address (as long as they have not given anonymously).

The **Grants History** section displays distributions out of your fund:

- **Grant Summary** displays the number of grants and the total grant amount to each grantee.
- **Grant History** shows the details of grants paid from the selected fund. Grant ID, date, status, grantee, description and amount are included. And for donor-advised funds, the name of the donor who requested the grant and even copy a previous grant. **Your list of grants can be exported.**
 - **Note:** Grants made before September 1, 2024 from your fund to an internal fund at CNYCF will show up with the Grantee as Central New York Community Foundation.
- **Recurring Grants** gives information for any scheduled recurring grants from your fund, including grant ID, grantee, start, interval, total grants, created grants, amount, and remaining amount. Informational columns can be sorted.

For donor-advised fundholders, in the **Grant Requests** section you will find a list of grants you have submitted. The list includes the request date, status, recipient, description, and amount. If the grant status allows, a grant can be canceled.

Under **Resources & Documents**, you can review the financial information and files associated with your fund:

- **Fund Statements** is where you will find statements of activity once they are published to the portal. Your annual fund statements will be uploaded to the portal after the close of the calendar year, and we will notify you when they are available to view, save or print.. Additionally, any statements issued by request will be uploaded to this section.
- **Files** is used for document storage. Staff will upload any documents related to your fund on this tab. If you would like to view a document, click the filename and the system will generate a PDF in a new window that you may view, save, or print.

MY FUNDS CONT.

The **Give to a Fund** link will take you to the CNYCF donation pages – here you can contribute to your fund or other funds managed at the Foundation.

YOUR PROFILE

The **Profile** button in the upper-right area of the portal is where you can view your information, contact preferences, and change your password.

- o **Personal Information** displays the primary address, email, and phone number we have on record for you.
- o **Security** is where you can update your user name or change your password. To change your password, click on the **Change Password** button, enter in your old and new passwords, and click Change Password.

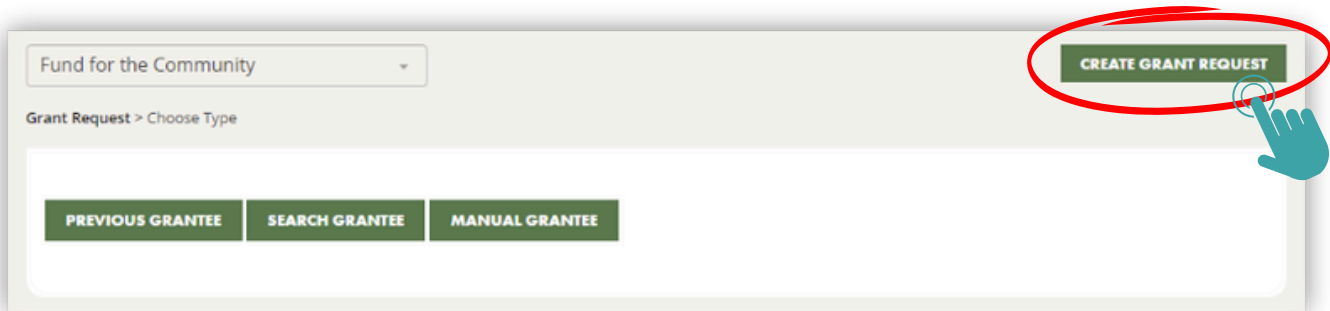
To update your mailing address, phone number, or other household contact information, please email us at donorsupport@cnycf.org.



RECOMMEND A GRANT/SUBMITTING A GRANT REQUEST

Donor-Advised Fundholders can recommend a grant right from the portal.

On the **My Funds** page, click the **Create Grant Request** button. The name of the fund account you are accessing is listed in the fund dropdown box. **IMPORTANT: If you have multiple funds, please make sure you select the correct fund when making a request.**



STEP ONE - CHOOSE A GRANTEE

Click the **Create Grant Request** button next to the fund name. Choose a Grantee in one of three ways:

1 PREVIOUS GRANTEE

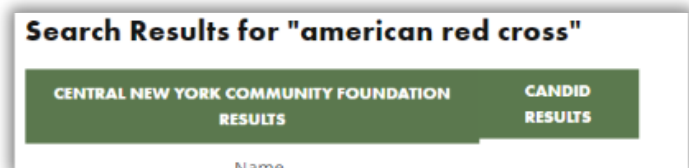
Here you have the option to choose from previous grantees or funds you have given to in the past. Click inside the text box for a drop-down list of grantees or funds. Choose from the list or begin typing the name of the organization/fund.

- **Grantees you have given to in the past:** Choose the organization you want to support from this drop-down list of organizations you have previously supported.
- **Other Foundation Funds:** Choose a CNYCF Initiative fund you want to support from this drop-down list of funds. Learn more at cnycf.org/initiatives

If you do not see the fund you wish to support in the drop down menu, enter it using Manual Grantee. **(Found on Page 7)**

2 SEARCH GRANTEE

Search for the organization you want to support from a list of nonprofits in the CNYCF database and in Candid, the world's largest database of nonprofit organizations. The more keywords used, the better the search results will be.



To search for an organization, add information to the Grantee Name or EIN fields and click **Search**. You can toggle between the results from CNYCF and Candid. Once you find the organization you want to support, click the **Create Request** button next to the organization's name.

STEP ONE - CHOOSE A GRANTEE CONT.

3 MANUAL GRANTEE

If you can't find the organization you wish to support, you will need to enter the information manually: Grantee Name, Address, Email, and Phone. To make an internal grant another fund at the Foundation, type the name of the fund in the **Grantee Name** field and in the address fields type **431 E. Fayette Street, Syracuse NY 13202**. Name and Address information is required. Once you enter this information, click **Submit**.

Once the organization has been selected, you will be redirected to a new page to provide pertinent grant details including the grant description and amount.

STEP TWO - GRANT DETAILS

On the Grant Request record, the **Grantee** field will display the name of the organization the grant is for. In the **Description** field, please provide the grant purpose and any special instructions for the charity. Keep in mind that if you don't designate a specific grant purpose, your grant will be designated for unrestricted use.

A \$100 minimum is required for each grant request. You can also choose to remain anonymous by selecting the Anonymous checkbox.

Message for CNYCF staff

This field is where you can enter any special instructions for the staff who will be processing your grant. Text that you type here will not appear on the grant letter that accompanies the check to the charity.

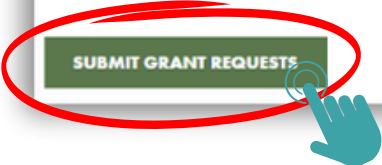
Once you are finished entering this information, click **Add To Cart**. You will then be taken back to the Grant Request section where you can edit the request you just created or create another grant request. If you are ready to submit, proceed to the next step to review and submit your request.

	Recipient	Description	Amount	
DELETE	American Red Cross	In memory of Mr. Mittens.	100.00	EDIT
DELETE	St. Jude Children's Research Hospital	Unrestricted	1,500.00	EDIT
Grant Request Total			1,600.00	
REVIEW AND SUBMIT GRANT REQUESTS				

STEP THREE - REVIEW & SUBMIT REQUEST

Review your grant request details and click [Submit Grant Requests](#). Once you submit the request, our team will begin processing the grant request.

Grant Request Cart			
Grantee	Description	Amount	Anonymous
American Red Cross 139 W Dominick St # 1 Rome, NY 13440-5809	In memory of Mr. Mittens. Message for CNYCF staff:	\$ 100.00	No
St. Jude Children's Research Hospital 501 St. Jude Place Memphis, TN 38105	Unrestricted Message for CNYCF staff:	\$ 1,500.00	Yes
Total		\$ 1,600.00	



VIEWING GRANT HISTORY

To review your most recent grant history, click on [Grants History](#) in the menu to the left and click on the Grant History tab. In the Status column under the Grants History section, you will see one of six statuses for each grant:

- **Request** means that your grant request has been sent to our team. If you would like to cancel a pending grant request before it is processed, click the [Cancel](#) button.
- **Cancelled** means your grant request has been cancelled.
- **Pending** means that our team is currently processing your grant request.
- **Approved** means your grant request has been approved but not yet paid.
- **Paid** means that the grant request has been approved and a check has been paid out to the organization.
- **Completed** means the grant request has successfully been fulfilled.

From the [Grant History](#) tab you can repeat a previous grant by clicking Copy. You will have the opportunity to edit details of the copied grant request before adding it to your cart.