

### **Fund Advisor Portal Overview**

As a Fund Advisor, you have access to an online portal where you can view information about the funds you manage. As always, thank you for letting the Wyoming Community Foundation assist in your charitable efforts.

The Portal is a secure web page where you can:

- View Fund Activity
- View Fund Balances
- Make Grant Requests
- View and Print Fund Statements
- Access the Giving Hub to Make Online Donations

## **Highlighted Features**

- Quarterly Statements will be posted directly to the Fund Advisor Portal.
- Account balances are updated in real-time inside the Fund Advisor Portal. For those accounts that
  receive high volumes of donations each week, you will see the most recent transactions on the
  account's main page when you log in. Use the section labeled "Donations" to review all historic
  gifts received into the fund since 2015. Please ask staff if you have any questions about grants or
  contributions prior to 2015.
- Donor Advised Funds will be able to review all pending and completed grants paid from the account as well use the "Grant Request" section to recommend a new charitable payment to an eligible recipient.

#### **Accessing the Portal**

Use this link to access the online portal: https://wyomingcf.fcsuite.com/erp/portal



1	Login
Password	ø
	LOGIN
F	Forgot your password?

Your email is your username. If you have forgotten and need to reset your password, use the "Forgot your password?" link below the login. If you are a new user and have not had your account set up please reach out to Database Specialist Chelsee Kucera, <u>chelsee@wycf.org</u> 307-721-8300.

### **Using the Donor Portal**

Once you have logged in you can select the tabs at the left of the page to review the different areas available to you as a Fund Advisor. If you are listed as an advisor for only one Fund, you will go directly to the **'Fund Summary'** page for that Fund. If you serve as an advisor for multiple funds, you will be able to select which fund you wish to view and interact with. You can then select from the drop-down menu to switch viewing to other funds.

The '**Fund Summary**' tab shows the Fund's Current Balance plus the Spendable balance (if applicable). This area also lists recent contributions and recent grants for the Fund.

		WYO		OUNDATION PORTAL			
			Welcome to the Fund Advisor Portal for the	Nyoming Community Foundation		AN HAVE AN A	
	Wyoming Tumbleweeds Fund						CREATE GRANT REQUEST
DONATIONS GRANTS				Current Balance 4,000.00			
GRANT REQUEST FUND STATEMENTS				Recent Contributions			
DONATE	10 v entries per page						Search
	ID	0 Date	Contributor				Amount
	68250	03/20/2025		Kucera	, Chelsee		5,000.00
	Showing 1 to 1 of 1 entry			Recent Grants			* 1 1 1 *
	10 v entries per page						Search:
	ID	a Date	4 Status	Grantee			Amount 4
	46127	03/20/2025	р	aid	Tumbleweeds for Wyoming		1,000.00

The **'Donations'** tab shows all contributions or donations to the fund. Clicking on a Contributor's name will bring up their history of contributions.

	w	elcome to the Fund Advisor Portal f	or the Wyoming Community Foundation			
FUND SUMMARY	Wyoming Tumbleweeds Fund					CREATE GRANT REQUEST
DONATIONS			Donations			🔻 FILTER 🛓 EXPORT
GRANTS	10 x entries per page					Search
GRANT REQUEST	cinica per page					
FUND STATEMENTS	ID		Туре	Description		Amount
	68250 03/20/2025	Kucera, Chelsee	Cash		to support fund	5,000.00
DONATE	Showing 1 to 1 of 1 entry					« « 1 » »

The **'Grants'** tab will show the history of Grants made from the fund. Select a grantee to see all grants made. Select a specific grant ID to view grant details and payment schedule.

		Welcome to the Fund Advisor	Portal for the Wyoming Community Foundation		
FUND SUMMARY	Wyoming Tumbleweeds Fund				CREATE GRANT REQUEST
DONATIONS	GRANT SUMMARY GRANT HISTORY	RECURRING GRANTS			
GRANTS			View Grants Made		
GRANT REQUEST			Grant Summary		
FUND STATEMENTS	10 v entries per page			Search:	
DONATE	Grantee			Grants	Amount 🔅
		Tumbleweeds for W	lyoming	1	1,000.00
	Showing 1 to 1 of 1 entry				c < 1 > ->

The '**Statements**' tab will show fund statements if they are set up for the fund. You will be able to view newly created fund statements immediately after they are created as well as past fund statements. The system will generate a PDF in a new window in your web browser that you may save or print.

	FUND SUMMARY	Wyoming Tumbleweeds Fund	]	CREATE GRANT REQUEST
	DONATIONS	FUND STATEMENTS		
	GRANTS		View Fund Statements	
	GRANT REQUEST		Statements	
_	FUND STATEMENTS	10 v entries per page		Search:
	DONATE	Description 🕴 Date Range		÷
ł	DONATE	Description	03/19/2025 - 03/21/2025	0 View

See the fund statement example below, find the print or download buttons in the upper right corner.

1 / 3	2   - 100% +   🗄	গ	* 🖶 :
WYOMING COMMUNITY FOUNDATION	Ma	Statement of Activity Wyoming Tumbleweeds Fund rrch 19, 2025 through March 21, 2025	
Fund Activity	Quarter to Date through March 21, 2025	Year to Date through March 21, 2025	
Beginning Balance	\$0.00	\$0.00	
Receipts Gifts & Bequests	5,000.00	5,000.00	
Total Receipts	5,000.00	5,000.00	
Distributions Grants Voted	1,000.00	1,000.00	
Total Distributions	<u>1,000.00</u>	<u>1,000.00</u>	
Ending Balance	<u>\$4.000.00</u>	<u>\$4,000.00</u>	
Available for Grantmaking:	4,000.00		
Grant Detail:			
Tumbleweeds for Wyoming	1,000.0	0	
Total Grants		\$1,000.00	

The '**Donate**' tab will take you to the Giving Hub, where you will be able to donate to your own fund or to one of WYCF's public funds. You can search for additional funds at the top of the page, or at the bottom select **'Show Additional Funds'** to view a list of all public funds available for online donation.

			< Heturn to	the main website	
			DONATE TO A FUND	e LOGIN	
Thank you for your generous gift! You are building a better Wyoming. We appreciate your commitment to your community and to this great state we call home.					
Select any of the funds below to donate onli After utilizing the Search option, if you are unable to th Exerch Fun	ne. Questions or need additional information please contact find the fund you would like to donate to - Click on Wyomir e fund in the Additional Notes section on the payment page ds	Chelsee Kucera by e Ig Community Found I.	mail chelsee@wycf.org ation Annual Fund, and	l then list	
<image/> <section-header><section-header><section-header><section-header><section-header><section-header></section-header></section-header></section-header></section-header></section-header></section-header>	<image/>	Wyoming A Supports the opera	fter School Allian tons of the Wyoming Alber St	CE chool Alliance.	
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	SHOW ADDITIONAL FUNDS				

Remember to use the **'Logout'** tab to close your Donor Portal. You will be automatically logged out each night even if you do not logout.

#### How to Use Grant Requests

As a fund advisor of a Donor Advised Fund, you can use this portal to make Grant Requests. This tab will show a list of grants requested to be paid out in the **Grant Request Cart**. Grant Requests can still be canceled or edited from here. Past grants made are listed below in the **Grants** area.

		Welcome to	the Fund Advisor Portal for the Wyoming Community Foundation		
FUND SUMMARY	Wyoming Tumbleweeds Fund				CREATE GRANT REQUEST CART (1)
DONATIONS					
GRANTS			d; and that funding of grants out of my donor advised fund does no donors, advisors, or entities controlled by any of t	It constitute satisfaction of a pledge on my behalf, or that of my hese persons.	
GRANT REQUEST	Constant services to defend in the selected fund on		a tha annulas in the second that the second second states to an end of	ieradu. Oz ku asladina anazuran ku asadas(a) uili kasu as	. that the distribution is service from the VA/CE 16
FUND STATEMENTS	Granit requests default is to release fund an you would lil	te to only release the name of the fu	and and any grantee correspondence to be directed to the WY	CF please include details in special instructions portion of	f the grant request.
DONATE			Grant Request Cart		REVIEW GRANT REQUESTS
		Recipient	Description	Attachment	Amount
	DELETE	Tumbleweeds for Wyoming			100.00 EDIT
				Grant Request Total	100.00
			Grants		
	Request Date	Status	Recipient	Description	Amount
	03/20/2025	Paid	Tumbleweeds for Wyoming	tumbleweed seeds	1,000.00

In the upper right side of your screen is the **'Create Grant Request'** and **'Cart'** buttons where you can create a new grant request or review your grant requests in the cart.

Select 'Create Grant Request' to take you to the screen below where you can select 'Previous Grantee or Fund' you have granted to in the past, 'Search Grantees' to use the system and search <u>GuideStar</u> for organizations, or 'Manual Grantee' to manually enter name of grantee.

	Welcome to the Fund Advisor Portal for the Wyoming Community Foundation
JND SUMMARY	Wyoming Tumbleweeds Fund -
DONATIONS	The Wyoming Community Foundation (WYCF) is pleased to offer you the opportunity to make grant recommendations from your Donor Advised Fund. As donor advisor, I understand that my recommendation is
GRANTS	can receive no goods or services as a result of grants from my door advised fund; and that funding of grants out of my donor advised fund does not constitute satisfaction of a pledge on my behalf, or that of m donors, advisors, or entities controlled by any of these persons.
ANT REQUEST	
ND STATEMENTS	Grant requests default is to release fund and advisor name and mailing address to the grantee in the event that the grantee wisnes to correspond directly. Or by selecting anonymous the grantee(s) will know only would like to only release the name of the fund and any grantee correspondence to be directed to the WYCF please include details in special instructions portion of
DONATE	Grant Request > Choose Type
	PREVIOUS GRAVITEE OR FUND SEARCH GRAVITEE MANUAL GRAVITEE
	1

GuideStar is an information service specializing in reporting on U.S. nonprofit companies. If searching GuideStar the more keywords used, the better the search results will be. See the example below when searching Wyoming Community Foundation.

		Welcome to the Fund Advisor Portal for the Wysening Conversely Foundation	
FUND SUMMARY	Wyoming Turntileveeds Fund		CREATE GRANT REQUEST CANT
powitions searchs	The Wyoming Community Foundation (WYCF) is pl can receive no goods or services as a result of gr	Assed to offer you the opportunity to make grant recommendations from your Doner Advised Fund. As dor pants from my door advised fund, and fluit funding of grants out of my donor advised fund does not constill donors, advisors, or entities controlled by any of these per	nor advisor, I understand that my recommendation is solely advisory and not binding on the WYCF, B use satisfaction of a pixelype on my behalf, or that of my spouse, tamily members, employer and/or oth sons.
GRANT REQUEST	Grant requests default is to release fund and adve you would like to o	sor name and mailing address to the grantee in the event that the grantee wishes to correspond directly. Or Inly release the name of the fund and any grantee correspondence to be directed to the WYCF please	r by selecting anonymous the grantee(s) will know only that the distribution is coming from the WYC/ se include details in special instructions portion of the grant request.
		Search Results for "Wyoming Community Founda Name Wyoming Community Foundation	ation" Adhess EN 1472 N 59 St, 59 201 83-201513
	CHEATE NEQUEST	Wyoming Community Foundation Administrative Endowment Fund Wooming Community Foundation Annual Fund	Larania, WY 50972
	Wyoning Cammunity Foundation City	Search for Grantees	
	EN		

If entering a grantee manually, you will need to enter the name of the new grantee, an address, and zip code to move the grant request to the '**Cart'** for approval. Once completed select '**Submit'**.

	Malcome to the Fund Adv	visor Plortal for the Wyoming Community Fluoridation
FUND SUMMARY	Wyoming Turnbleweeds Fund -	CHEATE BANKT MEDARST
DONATIONS	The Wyoming Community Foundation (WYCF) is pleased to offer you the opportunity to make	e grant recommendations from your Donor Advised Fund. As donor advisor, I understand that my recommendation is solely advisory and not binding on the WYCF, th
GRANTS	can receive no goods or services as a result of grants from my door advised fund, and that f	lunding of grants out of my donor advised fund does not constitute satisfaction of a pledge on my behalf, or that of my spouse, family members, employer and/or oth donors, advisors, or entities controlled by any of these persons.
GRANIT REQUEST		
FUND STATEMENTS	Gram requests default is to referre inno and advisor name and maning address to the grame you would like to only release the name of the fund and an	the in the event that the granice warks to correspond already. Or by selecting anonymous the granice(s) will know only that the distribution is conting from the verturity granitee correspondence to be directed to the WYCF please include details in special instructions portion of the grant request.
DOWATE		And the set of the set of the set
	Enter Grantee information manually	
	Grantee Name *	
	Street Address *	street, Sula, Building, shee
	Chy* State* Zpo	ode*
	Enal Por	PA
	EN .	
	*These fields are required	

Once the grantee information has been added, you can move the request to your grant cart by -clicking the '**Add to Cart**' button at the bottom of the page.

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GRANTS	can receive no goods or services as a resu	It of grants from my door advised fund; and that funding of grants out of my donor ac donors, advisors, or entities co	tvised fund does not constitute satisfaction of a ple ontrolled by any of these persons.
GRANT REQUEST	Grant requests default is to release fund and	d advisor name and mailing address to the grantee in the event that the grantee wish	es to correspond directly. Or by selecting anonym
FUND STATEMENTS	you would lik	e to only release the name of the fund and any grantee correspondence to be o	directed to the WYCF please include details in
DONATE		Grant Request > Ohor	ase Type > Create Request
		Grant Request	
	Grantee	Wyoming Community Foundation	
	Primary Contact	Ms. Samin Dadelahi	
	Address	1472 N. 5th St., Ste. 201 Laramie, WY 82072	
	Description		
		0/255 characters	
	Amount		
	Anonymous	0	
	Recurring		
	Attachment	Choose Files No file chosen	
		(or orag and drop anywhere on the page)	
	Attachment Description		
	Special Instructions		
		ADD TO CART	

Once added to your grant **Cart** it will take you back to the main **Grant Requests** page, you will then need to select **'Review Grant Requests'** to submit grant requests.

e		CREATE GRANT REQUEST CART (2)			
The Wyoming Community Foundation (WYCF) is pleased to offer you the opportunity to make grant recommendations from your Donor Adviced Fund As donor adviced. I understand that my recommendation is solely advicory and not binding on the WYCF; that can receive no goods or services as a result of grants from my door adviced fund, and that funding of grants out of my door adviced fund door ad					
		REVEW GRANT REQUESTS			
	Attachment	Amount			
		100.00			
		100.00			
tal	Grant Request Total	200.00			
	Description	Amount			
	Description				

This will allow you to submit all the grants in your **Cart** at one time, if you have more than one.

Once submitted you can now view the grants in the Grants area. They will show the status of the **Grants** from your fund. First, they will show as requested, and once processed by WYCF staff they will update to paid status.

Webcare to the Fund Advance funds for the Vayance Community Foundation							
FUND SUMMARY	Wyoming Tumbleweeds Fund					CREATE GRANT REQUEST	
DONATIONS	The Wyoning Community Foundation (WYCF) is pleased to offer you the opportunity to make grant recommendations hom your Donor Advised Fund. As donor advisor, I understand that my recommendation is solely advisory and not binding on the WYCF; that I can receive no goods or services as a result of grants from my door advised hand, and that hinding of grants out of my donor advised hand does not constitute additions of a jaidge on my behalf, or that of my spouse, tamity members, employer and/or other donors advisor, or ensembles advisor tames ensembles.						
ORANTE							
GRAVIT REQUEST							
FUND STATEMENTS	Grant requests detail to veicase hand and adverse name and making address to the grantee withing both correspond directly (of by selecting anonymous the grantee) will have only that the duititation is corring from the WVCF # you would like to review the relaxes the name of the hand and my grantee correspondence to be directed to the WVCF plass and the duititation request.						
DOWNTE							
		$\checkmark$	Grants				
	Request Date	Status	Recipient	Description	Amount		
	03/21/2025	Request	Wyoming Community Foundation		100.00	CANCEL	
	03/21/2025	Request	Tumbleveeds for Wyoming		100.00	CAIKEL	
	03/29/2025	Paid	Tumbleweeds for Wyoming	Tumbleweed seeds	1,000.00		

# FAQs

**Do the Available Cash Balance and Spendable Balance reflect pending Grants?** No. Pending Grants will show up in the "Home" tab and Grants tab but will not reduce the Available Cash Balance and Spendable Balance.

I do not understand how to navigate the portal. Where can I get help? Chelsee Kucera (chelsee@wycf.org or 307-721-8300) for assistance.

I want to update the fund's information. Can I do that in the Portal? If you want to update details for the fund, please reach out to Misty Gehle (misty@wycf.org or 307-721-8300)

If you would like to update your contact information or password, you can navigate to the **'Profile'** area in the upper right corner of the page:

	FUND MANAGEMENT	CSUITE 0 PROFILE	€+ LODOUT
	No. of Concession, Name		Marine Countie
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A CONTRACTOR OF THE OWNER OWNER OF THE OWNER		In the second the	
WYOMING COMMUNITY FOUNDATION PORTAL	see in the in	125 July 1 1	GAD &

This will allow you to update **'Personal Information'** which will directly update our database for name, address, email or phone number. Or **'Security'** to update your username and/or password.

<b></b>	PERSONAL INFORMATION			I EDT MOMMON
7	BECURITY	Name	Kucera, Chelsee	
		Primary Address		
		Ernal	chelses@wyct org	
		Phone Number		
		-		

How do I return to the portal? Use the link anytime https://wyomingcf.fcsuite.com/erp/portal

I have lost my password. What should I do? For security reasons, the WYCF team does not have the ability to access your password. If you are locked out of your account, click **Forgot Password** on the login page. Enter your username and click the **Reset Password** button. If an account with the provided username is found, instructions to reset your password will be sent to the email address for that account. If you are still having trouble, please contact Chelsee Kucera (<u>chelsee@wycf.org</u> or 307-721-8300) for assistance.

What if I am an advisor for more than one fund? If you serve as an advisor for multiple funds, you will see the "Choose Fund" menu once you have successfully signed into the portal. Choose the account with which you wish to interact.

**How will I know if I submitted a grant successfully.** You will receive an email when the grants have been submitted. You can also check the status of the grant in the portal on the "Grants" tab.

If you have any questions or concerns, feel free to reach out to staff at any time. PH: 307-721-8300

Misty Gehle – Chief Financial Officer – <u>misty@wycf.org</u> Chelsee Kucera – Database Specialist – <u>chelsee@wycf.org</u>