FUND PORTAL
Quick Start Guide

The Jewish Community Foundation's online Fund Portal provides access to your Donor Advised Fund(s). Once logged in, you can review your fund balance, make grant recommendations, view the gift and grant history for your fund(s), and receive access to fund statements.

GET STARTED

Navigate to the log in page for the portal:
https://milwaukeejewish.spectrumportal.net/#/accounts/signin.
You can bookmark this site on your computer for easy access in the future.

Or you can access the portal any time from our website,
https://www.milwaukeejewish.org/departments/philanthropy/jcf/
and click on FUND PORTAL link:

Register for an account: Even if you previously had an account, you will need to register in the updated portal. On the log in page, click the Register tab at the bottom and fill in the requested fields. Your user name will be your email address.

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Create a password: Passwords will have to be at least 8 characters in length with a mix of upper and lower cases letters, and at least one digit or special character.

Receive Confirmation: Once you have registered, the Jewish Community Foundation staff will verify your information and approve your account. This helps ensure your information is kept secure. You will receive a confirmation email when you are granted access to your fund information. *Please allow up to one business day for approval.*

Log in: to the **FUND PORTAL** with the email and password you used to set up your account.

FIND HELP

Each page in the Portal has help topics to answer some questions you may have about information on the page and to guide you on how to use the system. Click the green half circle on each page for help.

NAVIGATE THE SITE

The Fundholder Home Page provides your fund balance, grant summary information, a grant history chart, a gift history chart, and more. Peruse the page for a quick view of activity associated with your fund. Link to other parts of the site from here.

The Fund Advisor Dropdown Menu also gives you quick access all areas of the portal.

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RECOMMEND A GRANT

Recommending a grant is easy. You can select organizations that you have previously granted to, search for organizations in our database, or add a new organization to recommend a grant. *All organizations are vetted by JCF staff to ensure they are eligible to receive a grant.*

Select **RECOMMEND GRANT** from the **FUND ADVISOR** menu at the top of the screen. You can then **complete information on each of 5 tabs** on the bottom half of the screen.
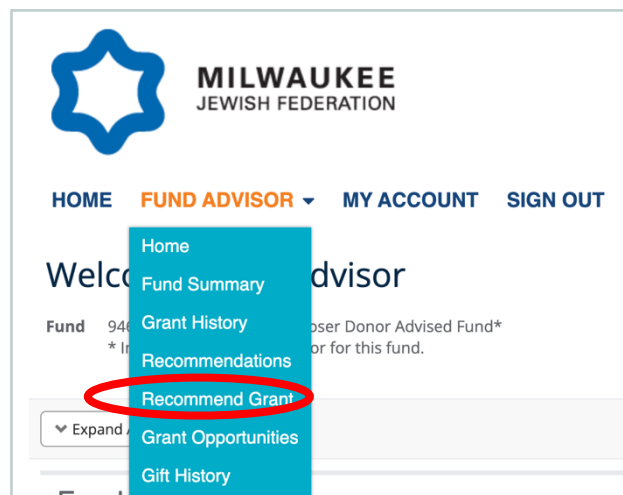
Fund Details Tab: You will see your fund name and basic information here. If you are a fund advisor for more than one fund, click the **Edit** button to select the fund from which you want to recommend a grant.
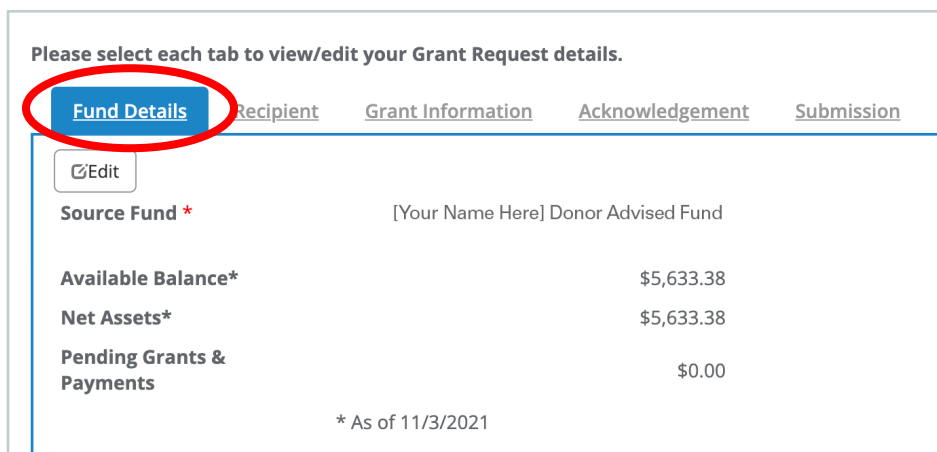
Recipient Tab: Click the **+Add** button to select or add a recipient. You will see options for searching for a recipient, including **Search all recipients in the database**, **Search for recipients in past grants**, and **Enter a new recipient**.

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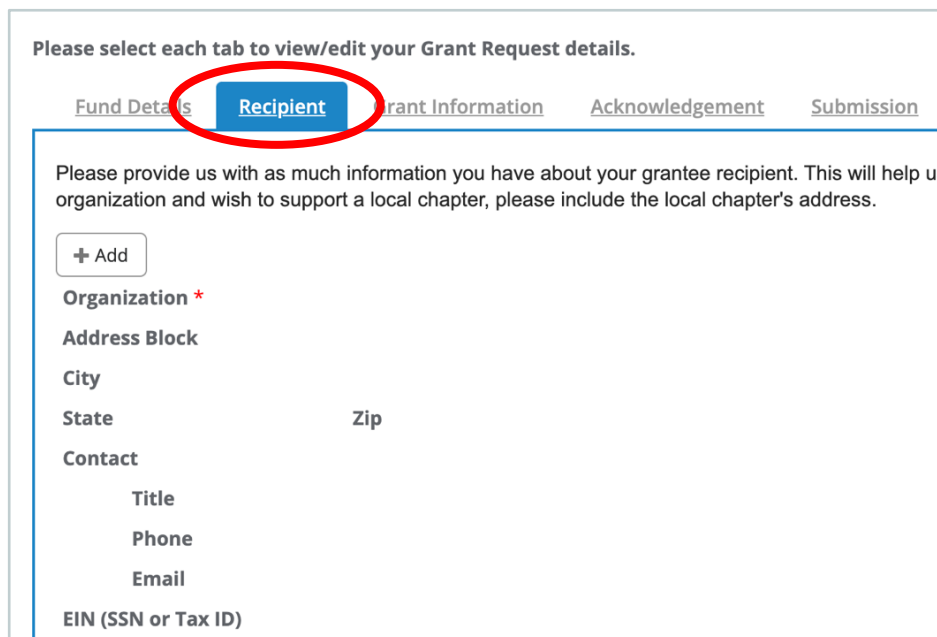
To search for an organization in the database, click Search all recipients, hit **Continue**, and search for the intended organization. Occasionally an organization will not turn up in the search results, even when you expect it will. That's okay, you can just click "Enter a new recipient" and put in the organization name, and city if not in the Milwaukee area. We'll take care of the rest.

To recommend a grant to an organization you have supported in the past, you may choose **Search for recipients in past grant requests**. This takes you to your **Grant History** page. Click the **ellipsis (…)** button next to the organization you want to make a grant to and choose **Add to grant recommendation.**

To recommend a grant to an organization you have not supported in the past, select **Enter a new recipient** and enter information about the organization.

Grant Information Tab: Click the '**Edit**' button to enter details about the grant including amount, payment frequency, purpose, and any special instructions (if needed).

Please select each tab to view/edit your Grant Request details.

| Fund Details | Recipient | **Grant Information** | Acknowledgement | Submission |

☑ Edit

Amount *
Recurring Payment
Payment Frequency *   Single Payment
Grant Designation *
Special Request
Notes to Staff

Previous Tab   Next Tab

Acknowledgement: Here you can check boxes if you want the Donor or the Fund to be Anonymous.

Submission tab: Confirm the grant recommendation requirements by checking the '**I Agree**' box and click the '**Submit**' button. You will receive a confirmation email.

Please select each tab to view/edit your Grant Request details.

| Fund Details | Recipient | Grant Information | Acknowledgement | **Submission** |

Legal Statement

1. Any organization for which you suggest a grant must be classified as a public charity under Section 501(c)(3) of the Internal Revenue Code. This information will be verified for you.
2. Advisers wishing to remain anonymous in regards to publications of the receiving organization should indicate this in the Grant Purpose section on this electronic form.
3. Grants will not be made to private non-operating foundations.
4. In accordance with IRS regulations, grants will not be made to benefit individuals.

The above recommendations do not represent satisfaction or discharge of a legally binding financial obligation of the undersigned such as membership fees or contributions from which personal benefit is derived. Additionally, the above recommendation does not provide any excess personal benefit toward any family member, family-controlled entity, or other party with grant recommendation authority with the Donor Advised Fund. If any benefits are offered in connection with such distribution(s), I have not accepted and will not accept them.

I Agree ☐
Advisor Signature   *

Upon submission, you will receive an email notifying you of the submission. If you do not receive the notification, please contact the foundation.

Previous Tab   Submit

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VIEW GRANT HISTORY

Select **GRANT HISTORY** from the **FUND ADVISOR** menu. A list of your prior grants will display. You can search for specific grants using the search box and change the number of grants that will display on the page.

Click the **ellipsis button (...)** next to the grant and click **Open Recipient** to view organization information. You may make a grant recommendation to an organization on this list by clicking the **ellipsis button** and selecting **Create Grant Recommendation**.

VIEW GIFT HISTORY

Select **GIFT HISTORY** from the **FUND ADVISOR** menu. A list of contributions will display. You can search for specific contributions using the search box. You also can set the number of contributions to display per page.

Need help or have questions about your fund portal?
We are here to help!

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