



AAACF Fund Portal Guide

Logging In

The first time you log into the portal, you will choose to “Login with email” instead of with a username and password. An email will be sent to you with a PIN to enter into the login page.

Once logged in, you can now create a username and password by going to the Profile tab and then the Security menu on the left side. Choose ADD USERNAME/PASSWORD and be sure to save your credentials in a secure location for future use.

After creating a username and password, you may also add extra security to your account with two-factor authentication. To do so, click ENABLE next to “2-Step Verification” and follow the prompts to setup text, email, or authenticator app verification to login.



Once you have setup your login credentials for the first time, you can log into the Fund Portal with your username and password here: <https://aaacf.fcsuite.com/erp/portal>

The screenshot shows the login interface for the Ann Arbor Area Community Foundation Fund Portal. On the left, there is a logo and a message: "If you need to reset your password please try the 'Forgot your password?' link below the login. Never created a password? Try the 'Login with email' option instead to have a PIN sent to your email. For questions or if you need assistance, please contact us at info@aaacf.org." Below this, it says "Fund Advisors, the Fund Portal Guide is a great resource for how to navigate the portal, how to recommend a grant, and other frequently asked questions." On the right, under the heading "Login", there are input fields for "Username" (containing "info@aaacf.org") and "Password" (masked with dots). Below these fields is a green "LOGIN" button. Underneath the button are two links: "Login with email" and "Forgot your password?".

Note the help text on the left side of the page if you are having trouble logging in with the password you are providing. Usernames and passwords are case sensitive, so make sure you are entering your username as provided (typically your email in all lowercase) and use the easy steps to reset your password as needed via the "Forgot Password?" link.

Profile Selection

If your email is linked with any other profiles in the portal, you will be prompted to select which profile's information you would like to access upon logging in. For fund advisors, in most cases you will want to select yourself rather than your household (yourself and your partner) or an organization profile.

The screenshot shows the profile selection screen with three cards. The first card is titled "Organization" and shows "Ann Arbor Area Community Foundation" with a "SELECT" button. The second card is titled "Household" and shows "Mr. John Smith and Mrs. Jane Smith" with a "SELECT" button. The third card is titled "Individual" and shows "Smith, John" with a "SELECT" button. A red arrow points to the "SELECT" button on the "Individual" card.

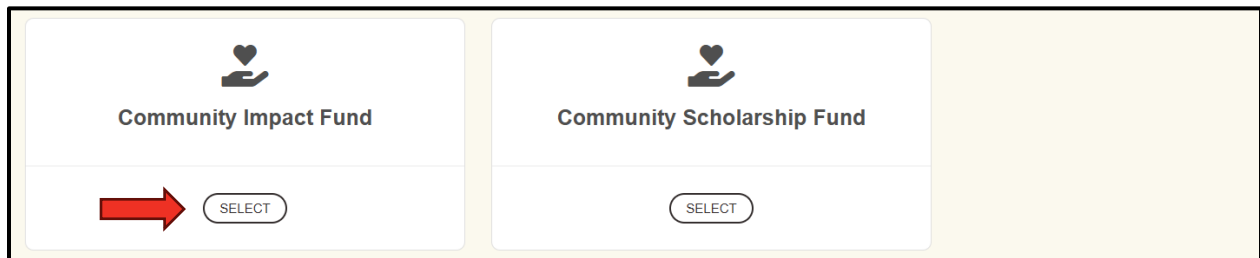
If the selected profile has a fund, you will see the fund selection or fund summary page. If it does not, then click "Profile" and then "Change Profile" to try a different one.

The screenshot shows the top navigation bar of the Fund Portal. It contains four links: "DONATIONS", "FUNDS", "PROFILE" (with a person icon), and "LOGOUT" (with a logout icon). Below the navigation bar, a red arrow points to a green button labeled "CHANGE PROFILE" with a person icon.

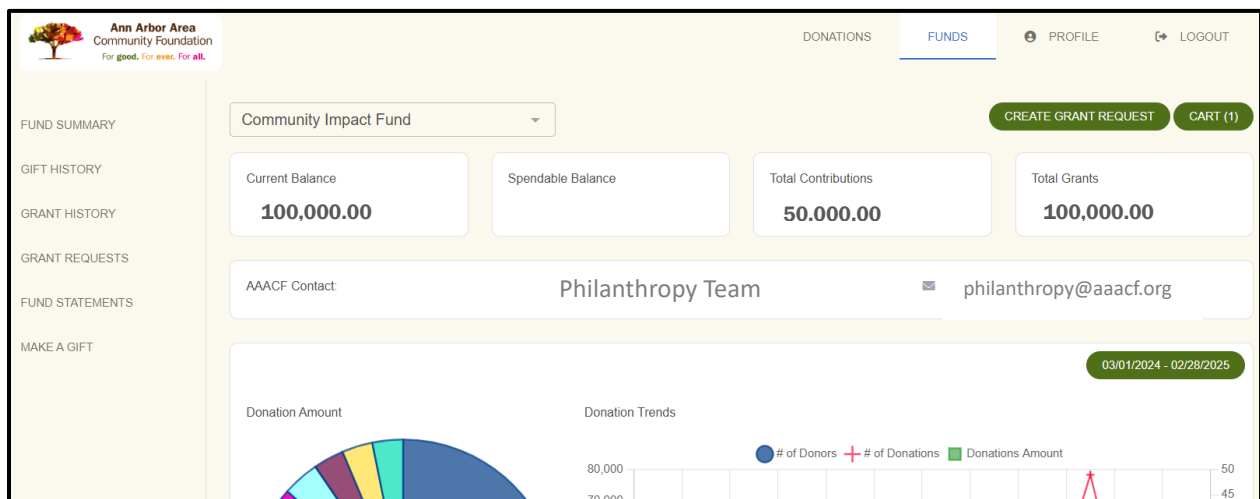


Navigation

If you have multiple funds, you will first be prompted to select the one you want to access. You can change the fund you are interacting with at anytime by using the dropdown option.



Once you are on a fund summary page, you can select the tabs on the left side of the page to review informational areas that are available to you as the Fund Advisor. Below is a summary of information for each tab.



- 1) **Fund Summary** - This tab shows a summary of the fund's Current Balance plus the spendable balance, if applicable. Total contributions, grants, and scholarships are listed. The graphs shown can be interacted with by hovering over to get more information, clicking on the graph to get even more detail, and by clicking dates to filter it.
 - a) If you have multiple funds, you can change the fund you are viewing at anytime by using the dropdown at the top of each page.
 - b) **AAACF Contact** shows you the name and email of an AAACF staff member that is your primary contact in regard to your fund. If you do not see a name there, please see our website to find a [philanthropy team member](#) to talk to.



- 2) **Gift History** - This tab shows all contributions or donations to the fund.
 - a) Click on a contributor's name to bring up their contribution history.
- 3) **Grant History** - This tab shows the grant history of the fund by grantee in the summary and by grant in the history tab.
 - a) If you have recurring grants, you can also find those in the recurring grant tab here.
 - b) Files related to the grant may be located in the grant detail by clicking the ID number
- 4) **Grant Requests** - This tab will show all grant requests for this fund. To submit a new grant request, click Create Grant Request in the top right.
- 5) **Fund Statements** - This tab allows you to view and download all current and historic fund statements.
 - a) If you choose to print statements, the system will generate a pdf that you can save or print.
- 6) **Make A Gift** - This tab takes you out of the Fund Portal and to our Giving Opportunities page where you can give to any of our hundreds of funds.

Additional Resources

- ❖ [AAACF Financial and Investment Information](#)
- ❖ [Ways to Give](#)

Contact Us:

Need more information? Find the right person to contact by looking in the top right corner of your portal or see our [website](#) to find a [philanthropy team member](#) to talk to.



Donor Advisor Information

To Recommend a Grant

- 1) From any fund page, click “Create Grant Request” in the top right corner
- 2) This page gives multiple options for you three options to choose from:

- a) Previous Grantee – this option allows you to quickly and easily choose from any past grantee, past fund you granted to, and from all other AAACF funds.



- b) Search Grantee – this option allows you to search both AAACF’s database for grantees and Candid’s database so you can find a new nonprofit easily and ensure that all the information is accurate. You can also use this search to find funds at AAACF to grant to.

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[GIFT HISTORY](#)
[GRANT HISTORY](#)
[GRANT REQUESTS](#)
[FUND STATEMENTS](#)
[MAKE A GIFT](#)

Community Impact Fund

CREATE GRANT REQUEST

CART (1)

Grant Request > Choose Type > Search

Search for Grantees

Grantee Name

CityState

EIN

SEARCH

[FUND SUMMARY](#)
[GIFT HISTORY](#)
[GRANT HISTORY](#)
[GRANT REQUESTS](#)
[FUND STATEMENTS](#)
[MAKE A GIFT](#)

Community Impact Fund

CREATE GRANT REQUEST

CART (1)

Grant Request > Choose Type > Search


Search Results for "Red Cross"

ANN ARBOR AREA COMMUNITY FOUNDATION RESULTS

CANDID RESULTS

	Name	Address	EIN
<div>CREATE REQUEST</div>	American Red Cross - Washtenaw County	7800 W OUTER DR STE 205 DETROIT, MI 48235	53-0196605

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Ann Arbor Area
Community Foundation
For good. For every. For all.

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[MAKE A GIFT](#)

Community Impact Fund

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ANN ARBOR AREA COMMUNITY FOUNDATION RESULTS

CANDID RESULTS

	Name	Address	EIN
<div>CREATE REQUEST</div>	American Red Cross	431 18th St NW Washington, DC 20006	53-0196605
<div>CREATE REQUEST</div>	Red Cross Civitans	3124 Wayne White Rd Climax, NC 27233	58-1771391
<div>CREATE REQUEST</div>	Red Cross of Constantine	123 Morgan Dr Joplin, MO 64801	26-2622865
<div>CREATE REQUEST</div>	Red Cross Elementary PTO Inc	215 Parkview Dr Glasgow, KY 42141	36-4944486



- c) Manual Grantee – this options is available for the rare case when the prior two options do not return the grantee you are looking for, so you can enter all of their information manually here.

The screenshot shows the 'FUND SUMMARY' page on the Ann Arbor Area Community Foundation website. The 'Community Impact Fund' is selected. The 'Enter Grantee information manually' form is displayed with the following fields: Grantee Name *, Street Address *, Apartment, Suite, Building..., City *, State *, Zipcode *, Email, Phone, and EIN. A note states '* These fields are required.' and a 'SUBMIT' button is at the bottom.

- i) Note that while EIN is not required, we highly recommend and appreciate it when you include it. The EIN is the unique identifier for the organization, so it speeds up the review process and reduces any likelihood that we will need to reach back out to confirm that we have the correct organization’s information based on the name entered.
- 3) Once a nonprofit or fund has been selected, you will provide the amount for the grant and the description for the purpose.
- a) “General Operating Support” is recommended for Description if you would like the receiving nonprofit to be able to use the grant funds for the widest range of options to support their mission.

The screenshot shows the 'Grant Request' form on the Ann Arbor Area Community Foundation website. The 'Community Impact Fund' is selected. The form includes the following fields: Grantee, Description (with a character count of 25/255), Amount (set to 500), Anonymous (checkbox), Recurring (checkbox), Attachment (with a 'Choose Files' button and text 'No file chosen (or drag and drop anywhere on the page)'), and Attachment Description. An 'ADD TO CART' button is at the bottom.



- 4) Repeat steps 1–3 until you have all of your grants ready for final submission. You will see these grant requests accumulate in the Grant Requests tab under “Grant Request Card.” Once you are ready, click the “Review Grant Requests” button below this section.

The screenshot shows the 'Grant Request Card' interface for the 'Community Impact Fund'. The left sidebar contains navigation links: FUND SUMMARY, GIFT HISTORY, GRANT HISTORY, GRANT REQUESTS, FUND STATEMENTS, and MAKE A GIFT. The main content area has a dropdown menu set to 'Community Impact Fund' and buttons for 'CREATE GRANT REQUEST' and 'CART (1)'. Below this is a table titled 'Grant Request Card' with columns: Grantee, Description, Attachment, Amount, and Anonymous. The table lists a request from 'Community Scholarship Fund' for 'General Operating Support' with an amount of '\$ 500.00' and 'No' for anonymous. A 'Total' row shows '\$ 500.00'. Below the table, there is a disclaimer about the advisory nature of the distributions and a list of prohibited purposes. At the bottom, there is a 'SUBMIT GRANT REQUESTS' button.

Grantee	Description	Attachment	Amount	Anonymous
Community Scholarship Fund	General Operating Support		\$ 500.00	No
Total			\$ 500.00	

By submitting this request, you also acknowledge that the distributions recommended above are advisory and that current tax laws prohibit donor advised funds from making grants for the following purposes:

- To pay for tickets, or any portion of tickets, to fundraisers or benefits that include material benefits such as a meal, a seat at an event, or other goods and services for yourself or any related party
- To purchase or fulfill memberships having any tangible economic benefit
- To support or benefit an individual, including yourself or related parties
- To fulfill a legally enforceable pledge you or a related party already has made
- To support political campaigns, or for lobbying purposes

Refusal of tickets and any other benefits must be made in writing to the organization with AAACF receiving a copy.

After you submit this request, you will receive an email confirmation. Please allow us two weeks to complete any due diligence needed for this grant distribution.

[SUBMIT GRANT REQUESTS](#)

- 5) Complete a final review of your grant requests to verify the correct nonprofits, amounts, descriptions, and other details. Click “Submit Grant Requests” at the bottom once you are ready.

From this point, our team will see your grant request and begin the next steps to verify the nonprofit status and process the payment. This process typically takes 2 weeks to be fully completed.



Donor Advisor Guidelines

- ❖ **You may make a grant at any time and are not tied to a December 31st deadline.**
 - A distribution from the fund will be made within two weeks of AAACF's receipt of your grant recommendation.
 - In cases where the grant recommendation exceeds \$100,000, the distribution will be made within 30 days.
- ❖ **You do not have to make grant distributions from the donor-advised fund each year.**
 - Some donors opt to skip a year to allow for a larger grant in the future. The minimum amount of a grant distribution from the donor advised fund is \$500.
- ❖ **You may support any 501(c)(3) nonprofit organization—local or national.**
 - Grants can be made to support your place of worship, faith-based schools and nonprofits—located in Michigan and throughout the United States. Non-charities and private non-operating foundations are not eligible for grants from donor-advised funds. If you have questions about the eligibility of an organization, please contact us. We can help provide due diligence in researching a nonprofit.
- ❖ **Grants from a donor-advised fund may not specify fulfillment of an existing personal pledge.**
 - You may recommend new pledge commitments by the fund, which would be signed by AAACF's President & CEO on behalf of the fund if approved. The total value of the pledge will be encumbered at that time.
- ❖ **Current tax laws prohibit donor-advised funds from making grants that:**
 - Benefit the donor – grants cannot be used to pay for tickets, or any portion of tickets, to fundraisers or benefits that include a material benefit such as a meal, a seat at an event; to purchase or fulfill memberships having any tangible economic benefit; or other goods and services for the donor, advisor, or any related party, such as preferred seat donations for athletics. The donor-advised fund can make grants to charities “in lieu of tickets.”
 - Support an individual – grants cannot be made directly to scholarship recipients, but can be made to an organization that administers a scholarship program. Tax law also prohibits donors, advisors, or related parties from receiving grants, loans, compensation, or similar payments from donor-advised funds.
 - Support political campaigns or for lobbying purposes.
 - Pay expenses associated with grantmaking, such as travel.



Frequently Asked Questions (FAQ)

Forgot your Password?

Click on the link that says “Forgot Password?” You will be prompted to enter your email address, which must match the email address AAACF has on file. Your password will then be emailed to you. If you have any difficulties, email info@aaacf.org for assistance.

Forgot your Username?

Email info@aaacf.org for assistance. The format of your Username is often your email address in all lowercase.

If I have multiple funds, will I be able to see the details for each fund separately?

Yes! For fund representatives with access to multiple funds, you will see a dropdown at the top of every fund page with the option to change which fund you are viewing.

Our organization has an agency endowment fund, why are there two funds listed? Due to Financial Accounting Standard (“FAS”) #136, both AAACF and your organization are required to account for endowment assets in two separate categories, depending on the donor. Gifts directly from your organization are categorized as “agency” assets while gifts from other donors are categorized as “designated” assets. AAACF’s Fund Portal tracks these two categories in separate fund statements.

How will I know when my fund statement has been posted online?

You will receive an email notification when the quarterly fund statements are posted in the Fund Portal.

What does “Spendable Balance” mean on the Home Page?

The “Spendable Balance” calculation is based on AAACF’s spending policy and represents the total grant dollars that can be distributed from a fund in a particular calendar year. For all non-endowed funds (Donor Advised Funds in particular), this is simply a guideline and may choose to recommend grants exceeding this amount.

Why are some names and/or amounts hidden or anonymous in the giving history?

These donors have indicated that they would like to give anonymously to your fund and we honor that anonymity by hiding their name and all other personal information from the fund advisors.

How do I make an online gift?

Gifts of any size to any fund may be made online through “Make a Gift” tab. Donors may use a credit card or may choose an electronic transfer from a bank account.