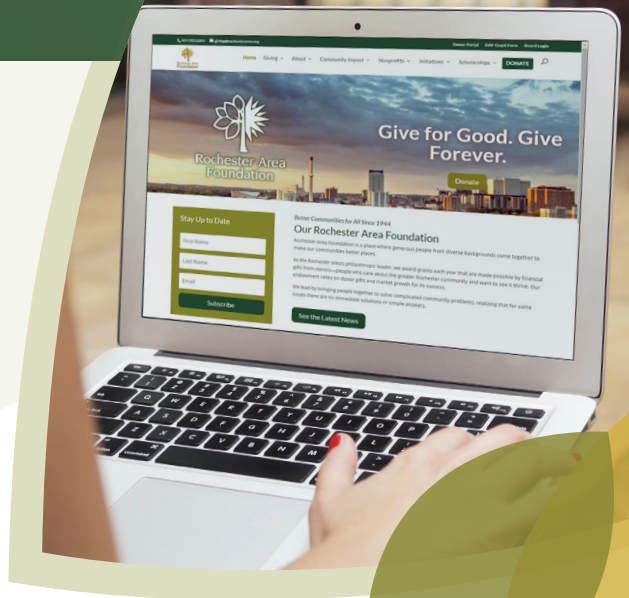


Rochester Area Foundation Donor Portal for Fund Advisors

Below you will find a basic instructions for accessing the Rochester Area Foundation Donor Portal as a primary fund advisor



Donor Portal for Fund Advisors

As a fund advisor for your Donor Advised Fund, you will have access to RAF's online portal where you can access information about the fund(s) you manage.

Establishing Your Donor Portal Password

Rochester Area Foundation staff will initiate your online access to the Donor Portal by sending you an introductory email with a link to set up your password for the Donor Portal. This email will be from **"no-reply@fcsuite.com"** and will reference **"Rochester Area Foundation"** in the subject line. Some email programs might flag this message as spam so if it does not make its way to your Inbox please check your Junk folder.

Please follow the link to the log in homepage, where you will set up your new password for the Donor Portal. Your username and login credential will be the email address to which the email is sent.

- Follow the link in your email
- Set up your new password and record it in a safe place if needed
- Delete the introductory email—it is only valid for one use

Accessing the Donor Portal

Once your password is created go to the Login page, enter your credentials and log in. .

PLEASE NOTE: If you serve as an advisor for multiple funds, you will see the "Choose Fund" menu once you have successfully signed in to the Donor Portal System. Choose the particular fund with which you wish to interact. The "Choose Fund" tab is only visible if there are other funds to select and view.

If you are listed as an advisor for only one Fund, you will go directly to the Home page for that Fund.

Using the Donor Portal

Once you have logged in to the Donor Portal you can select the tabs at the top of the page to review the different areas available to you as a Fund Advisor.

- The **"Home"** tab shows your fund's current balance along with the spendable balance.

- The **“Contributions”** tab shows amounts for contributions to the fund.
- The **“Grants”** tab will show the history of recent grant recommendations made from the fund.
 - Your fund will display grant history from 2018 to the present. If you would like additional historical information please email giving@rochesterarea.org.
- As a Fund Advisor for your fund, you may request grants to be distributed from your fund by clicking into the **“Grant Request”** tab.
 - This tab will show a list of any grants that have been requested to be paid out of your fund and their current status.
 - Grants still in the “request” status can be canceled from this screen.
 - The left side of the screen is where grant requests are created.
 - Once your grant request information has been entered, you can complete the request by clicking the “submit” button at the bottom of the page.
 - Look for the word **“Complete”** in the **“Status”** column to know your grant request has been sent.
 - Other status indicators will appear as the grant moves along our internal processes. Only the status **“Complete”** confirms that a grant has been successfully sent.
- The **“Statements”** tab will show archived fund statements in one convenient location that can be accessed at any time by any of the fund advisors.
 - Fund statements prior to 2021 will not be available for review on the portal
 - Printing Statements—The system will generate a PDF in a new window in your web browser that you may save or print.

PLEASE NOTE: Rochester Area Foundation assesses administrative fees monthly, and investment returns are realized monthly as well. Your current fund balance may not reflect these adjustments dependent upon the time of the month you review your fund balance. Quarterly statements will be made available quarterly.

- The **“Files”** tab will host relevant informational materials related to your Fund or Rochester Area Foundation.
- Remember to use the **“Logout”** tab to close your Donor Portal, especially if you are using a shared computer. You will be automatically logged out of the Donor Portal each night even if you do not log out.

Locked Out of your Donor Portal?

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 need additional support,
please contact Rochester Area Foundation at:**
507-282-0203 | giving@rochesterarea.org



Rochester Area
Foundation

www.rochesterarea.org

Frequently Asked Questions

I haven't received the auto-generated email yet. What should I do?

We suggest you first check your Spam or Junk folder for an email from no-reply@fcsuite.com. If you cannot find the email, please email giving@rochesterarea.org so that we can re-send the information you will need to access the Donor Portal.

I don't understand how to navigate the portal. Where can I get help?

If you have questions regarding navigating the Rochester Area Foundation Donor Portal, please send an email to giving@rochesterarea.org or call 507-282-0203 for assistance.

The URL in the introductory email only worked the first time. How do I return to the Donor Portal?

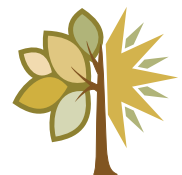
The custom URL inside the auto-generated email should only be used to establish your password. Take note of your username and the password you select and then visit www.rochesterarea.org to access the Donor Portal at any time.

I've lost my password. What should I do?

For security reasons, Rochester Area Foundation staff does not have the ability to access your password. You can reset your password on the donor portal login page. If you still need assistance, please email giving@rochesterarea.org or phone 507-282-0203.

I don't see a recent donation or grant request reflected in my fund activity. Where is it?

Rochester Area Foundation posts transactions to the Donor Portal as promptly as possible. Holidays may result in a delay in posting transactions related to your Fund. If more than five business days have passed and your transaction has not posted to your Fund, please contact giving@rochesterarea.org or phone Amanda Pelley at 507-282-0203 or at amanda@rochesterarea.org.



Rochester Area
Foundation