

Rochester Area Foundation Donor Portal

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

Donor Portal for Fund Advisors

As a fund advisor, 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 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

To access the portal at any time, simply visit www.rochesterarea.org and click on the "Donor Portal" button in the upper right corner of our landing page.

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 agency fund's current balance along with the spendable balance that represents your 5% spend rate allocation for 2021.

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 on the time of the month you review your fund balance. Cash statements for your funds will be made available on a quarterly basis.



- The **“Contributions”** tab shows amounts for contributions to the fund.
- The **“Grants”** tab will show the history of recent spend rate allocations (which show up as grants) made from the fund.
- As a Fund Advisor for your agency, you may request to take your fund’s 5% spend rate allocation in the form of a grant by clicking into the **“Grant Request”** tab.
 - On the right side of the page under **“Grants”** is list of any allocations (grants) that have been requested to be paid out to your organization 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.
 - Click on the drop down under **“Grantees you have given to in the past”** to find your own organization. This redirects you to the form for a **“New Grant Request.”**
 - Please type **“2021 Spend Rate”** in the description box.
 - The **“Amount”** will be the portion of the **Spendable Balance** (all or partial) your organization has decided to take. The “Spendable Balance” on the Home page reflects your 5% spend rate allocation for 2021.
 - Spend rate allocations are not allowed to be recurring, so please do not click that button.
 - Include any additional notes for staff in the **“Notes”** section.
 - Once your grant request information has been entered, hit the blue **“Review”** button to move to the final step. Please read through the terms of the grant. If you need to make a change, select **“Edit Request.”** Once you have reviewed your grant, you can complete the request by clicking the blue **“Submit Request”** button at the bottom of the page.
 - Look for the word **“Complete”** in the **“Status”** column to know your spend rate allocation (grant) has been paid.
 - Other status indicators will appear as the grant moves along our internal processes. Only the status **“Complete”** confirms that a grant has been successfully paid.
- 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. You will receive an automated email when your Quarterly Fund Statement(s) has been posted to the Donor Portal.
 - Statements from previous years to 2021 will not be available 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
- 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 logout.

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

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



Rochester Area
 Foundation

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, call 507-282-0203 for assistance, or visit www.rochesterarea.org/portal-info.

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 and click on the Donor Portal button in the upper right corner of our landing page to access the Donor Portal.

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 call 507-282-0203.

I don't see a recent donation or expense 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 to your fund. If more than five business days have passed and your transaction has not posted to your fund, please contact us at giving@rochesterarea.org or call 507-282-0203 to speak with a member of our staff.

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