

Portal Guide – All Other Funds Edition



Welcome to the online portal for Vermont Community Foundation fundholders. From here you can access detailed fund information—including the current balance and fund statements—submit distribution requests, and view distribution and gift history.

More instructions and helpful tutorial videos can be found at vermontcf.org/donor-portal-resources.

If you need assistance or have questions not addressed in these materials, please contact <u>philanthropy@vermontcf.org</u>. And, if you have suggestions for how this handbook could be clearer or more helpful, let us know!

Explore the portal with this orientation video tour.

How to Log In

There are a few ways to access the portal at any time:

- Go to vermontcommunityfoundation.my.site.com/login
- Visit <u>vermontcf.org/donor-portal</u>, or click on Donor Portal in the top right-hand section of any page on our website. Then click on the login button.





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Setting Up Your Portal Account & Password Requirements - Follow along with this video tutorial

You will receive an email, to the email address we have on file, providing your login link and inviting you to set your password.

When you set up your password, the following security requirements apply:

- 8 or more characters
- A combination of letters and numbers
- Must be changed every 180 days

Forgotten Password - Follow along with this video tutorial

If you have forgotten your password, click on "Forgot Your Password?" on the portal login page and enter the email address you have on file with the VCF in the "Username" field.

Vermont Community Foundation		Vermont Community Foundation
Username		Forgot Your Password
Password	→	To reset your password, enter your username. Username
Log In		1
Remember me		
Forgot Your Password?		Cancel
Vermont Community Foundation employee? Log In		

Check your inbox for an email from info@vermontcf.org. If you don't see it within a few minutes, check your spam or promotions folders. Open the email and click the password reset link. When the portal window opens, Click **Reset Password** to continue. Enter a new password. Click **Set Your New Password**, and you will be brought to your home page. Be sure to save your new password in a safe place for the next time you log in.

Vermont		Set Your New Password
Community Foundation Check Your Email	Vermont Community Foundation	Enter a new password for Make sure to include at least: 8 characters 1 letter
We've sent you an email with a link to finish resetting your password.	Reset your password?	1 number New Password
Can't find the email? Try checking your spam folder.	Let's get you set up with a new password.	
If you still can't log in, have us resend the email or contact your administrator.	Reset Password	Confirm New Password
Return to Login		*=required
		Set Your New Password

If you still cannot log in, please contact philanthropy@vermontcf.org

Change Your Password & User Access



If you're already logged in and simply want to update your password, you can do that too!

1. Click My Profile from the dropdown menu in the top-right corner of the page.

Vermont Community Foundation	Home	Funds 🗸	Grants	Gifts	Funding Opportunities	Get Support	Resources	Your Name Test 👻
								Home
								My Profile
								Logout
							and the second s	1600 Contraction

- 2. Select Settings and Preferences.
- 3. Click Change Password.

Profile	Mu Cottines
Settings & Pref	My Settings
	ACCOUNT DETAILS
	** Required information Cancel Save
	Account
	Username Email Address *
-	Password Change Password

- 4. Enter your current password and the new password you would like to use.
- 5. Re-type the new password to verify.
- 6. Click Save.

	Change My Password						
	You must adhere to the following pass	word rules:					
	* Your password must be at least 8 cha	aracters long.					
	* Your password must include letters a	and numbers					
•	Current Password						
	New Password						
	Varify New Deseurord						
	Venity New Password						
			T				
			Cancel				

Access for Other Users

If you would like to give portal access to others, please contact us through the support request form. We'll set up their access for you, including view-only permissions if appropriate. Likewise, feel free to let us know if you would like to remove portal access for someone.

Homepage Tour



Homepage

Here's a quick preview of what your homepage looks like! You will find shortcuts to key actions, important announcements, access to tutorials and the support request form, contact information for the Philanthropy team, fund details, and recent stories and news from the VCF.



To explore the homepage and see some of its features, check out this preview video:





Support Request

You can submit a support request and contact our team of philanthropic advisors directly from the home page.

1. Start by clicking **Submit a Support Request** in the blue box under **Need Help?** Alternatively, you can click **Get Support** in the top navigation menu.



2. Enter the type of support you need under the Support Type dropdown and a description of your request.

3. Click Create Support Request.

Get Support

	3	Enter Request Details B	elow	v							
* Support Type											
None					:						
* Description											
					10						
	Create Support Request										
▼ Show Filters Hide											
0 of 0 items								Q Search this lis	st		
Case Number	~	Submitted Date	~	Subject	~	Case Type	~	Description	~	Status	~
	No items to display.										

You'll find all your support requests, replies, and their status saved at the bottom of the page so you can refer back to them anytime.



Easily access your distribution history anytime.

1. Starting on the Home page, click **Funds** under the **Funds** dropdown in the header.



2. Select your fund.



2. View your full Distribution History. You'll see any distributions in process at the top (for example, if a second approval is still pending) and any paid distributions below that.

JND TYPE onprofit Reserve Fund	DATE FUND ESTABLISHED PURPOSE					As of M: Fun \$1	arch 17, 2025 d Balance 11,500	
						Current Year Sper \$2	ding Policy Calculation 5,000	•
tribution History G	ft History Investments Files	Additional Details						
ibutions In Process								
101					C. Coursels abile line	1		
of 0 items	Fund V Organization		~ Amount	→ Date	Search this list	ubmitted By	Status	
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0 of 0 items View V I Distributions Show Filters Hide) of 0 items	Fund v Organization	v .	✓ Amount No items to display.	✓ Date	Search this list	ubmitted By V	Status	

Easily see the gifts that have made into your fund anytime.

1. Starting on the Home page, click **Funds** under the **Funds** dropdown in the header.





Instructions Continue on the next page.



3. At the top of the page, you can see your Fund Balance, Current Year Spending Policy Calculation and Annual Spending Policy Amount Previously Reinvested (if applicable).

5. The default view will show you your Distribution History. Click on the "Gift History" tab to view the records of gifts that have been made into the fund over time.

6. You can also click on the "Investments" tab to view monthly account balances, the "Files" tab to view Fund Statements and other documents, and the "Additional Details" tab to view your Investment Pool, Supporting Fees, and Spending Policy.

7. Scroll down to see Market Value History and Investment Details, updated quarterly.

VCF Nonprot	it Fund								New Distr	ibution Request
FUND TYPE Nonprofit Reserve Fund	DATE FUND ESTABLISHED PURPOSE							Current Ye	s of March 17, 2025 Fund Balance \$11,500 ar Spending Policy Ca \$25,000	loulation
	Click he	re								100
Distribution History Gif	t History Investments	Files Additional Details								
Y Show Filters Hide)									
2 of 2 items							Q Searc	h this list		
View	V Donor(s)	V Fund	~ T	Гуре	~	Payment Method	~	Date	Amount	~
🖬 View	Your Name and User Test ar Other Family Members	VCF Nonprofit Fund	c	One-time gift		Cash		Feb 28, 2025		\$1,500.00
🖿 View	Your Name and User Test ar Other Family Members	VCF Nonprofit Fund	c	Dne-time gift		Stock		Jan 1, 2025		\$10,000.00

Distribution Summary

Total Distributions Paid	\$0
Total Distributions	0
Suggested Distribution Budget	\$42,482
Distributions This Year	\$0
Distributions to be Paid	\$0
Distributions in Process	\$0

Gift Summary

Total Gifts	\$1,801,389
Total # Gifts	36
Gifts This Year	\$0
Gifts In Process	\$0
Last Gift Date	January 17, 2024



Market Value History

How to View & Print Fund Statements



Easily access, download, print, or email your fund statements in just a few steps.

1. Starting on the Home page, click the **get fund statements** link or go to the **Fund** dropdown in the header and select **Statements & Fund Documents**.



2. Select your fund.



3. Select **Fund Statements** from the dropdown menu.

4. Access your statements—when posted by the VCF, you can download, email, or print them from this page.

Statements & Documents		
*FolderNone +	C	← Back
Fund Statements Fund Documents	Select Fund Statements	
Other		

5. For a helpful explanation of terms on your fund statement, visit vermontcf.org/terms