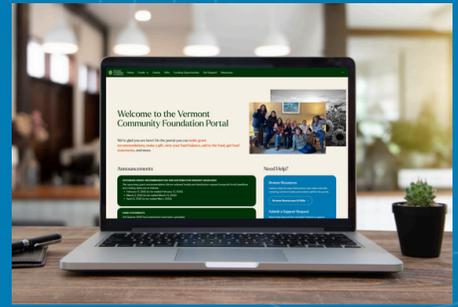




Portal Guide – All Other Funds Edition



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.

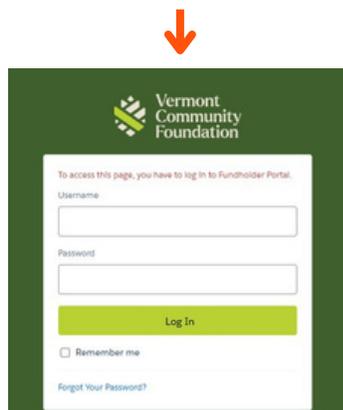
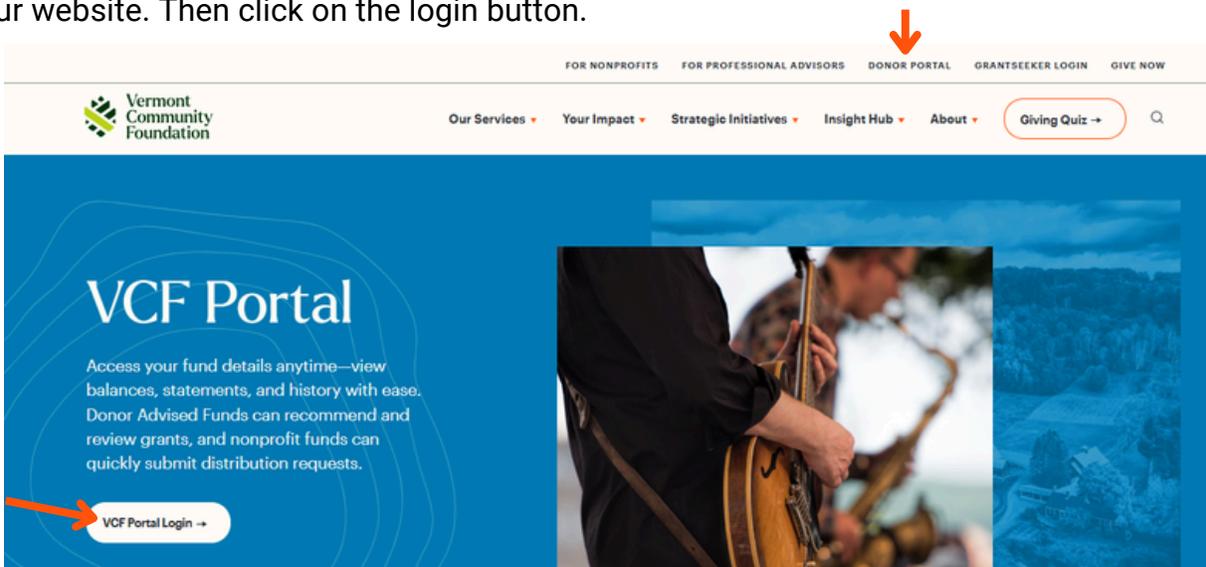
If you need assistance or have questions not addressed in these materials, please contact philanthropy@vermontcf.org. And, if you have suggestions for how this handbook could be clearer or more helpful, let us know!

[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 vermontcf.org/donor-portal, 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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<u>Forgotten Password</u>	3
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<u>See Distribution History</u>	7
<u>Gift History & Fund Details</u>	8
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Setting Up Your Portal Account & Password Requirements - [Follow along with this video tutorial](#)

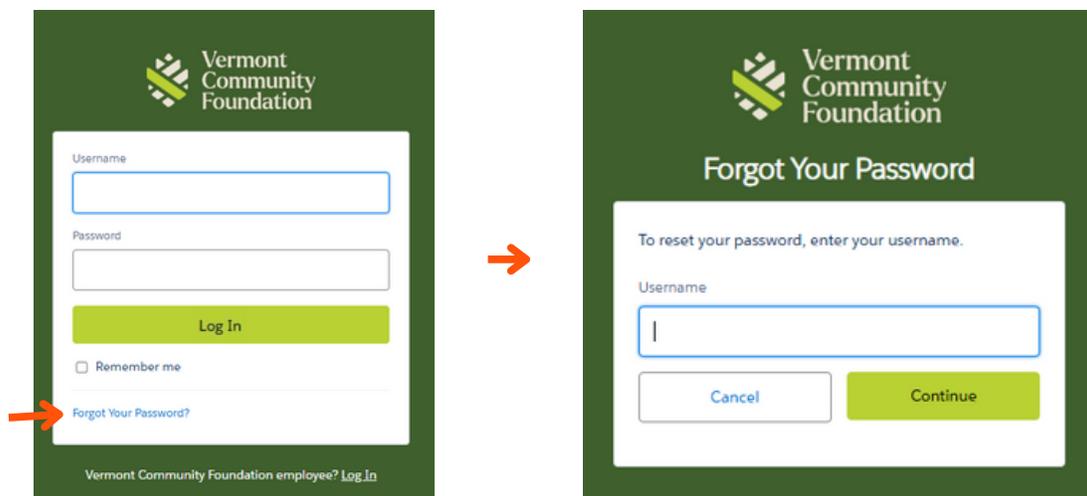
You will receive an email, to the email address we have on file, providing your login link and inviting you to set your password.

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

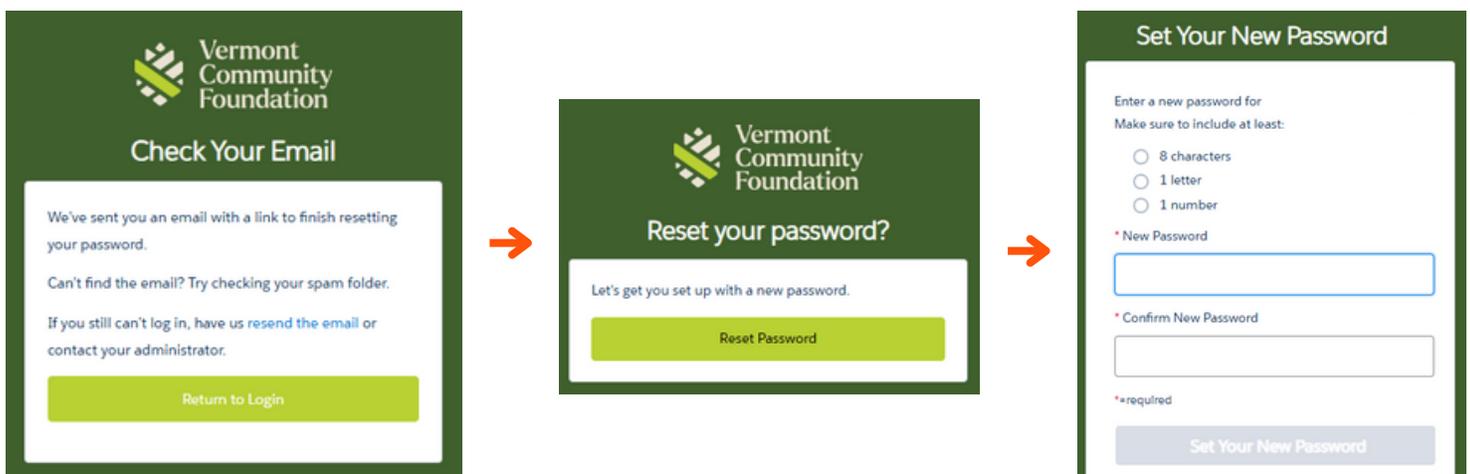
- 8 or more characters
- A combination of letters and numbers
- Must be changed every 180 days

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.



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.



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

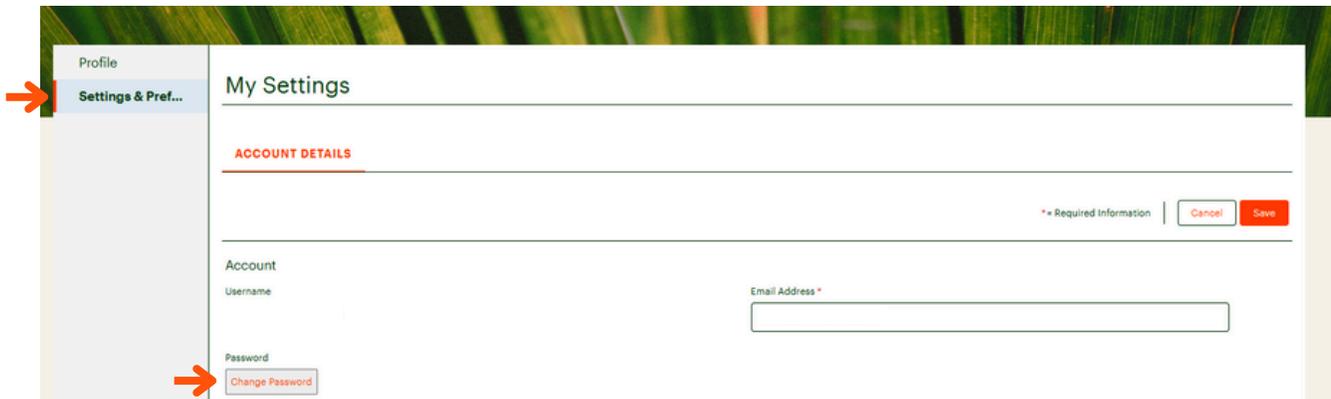
If you're already logged in and simply want to update your password, you can do that too!

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



2. Select **Settings and Preferences**.

3. Click **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 password rules:

- * Your password must be at least 8 characters long.
- * Your password must include letters and numbers

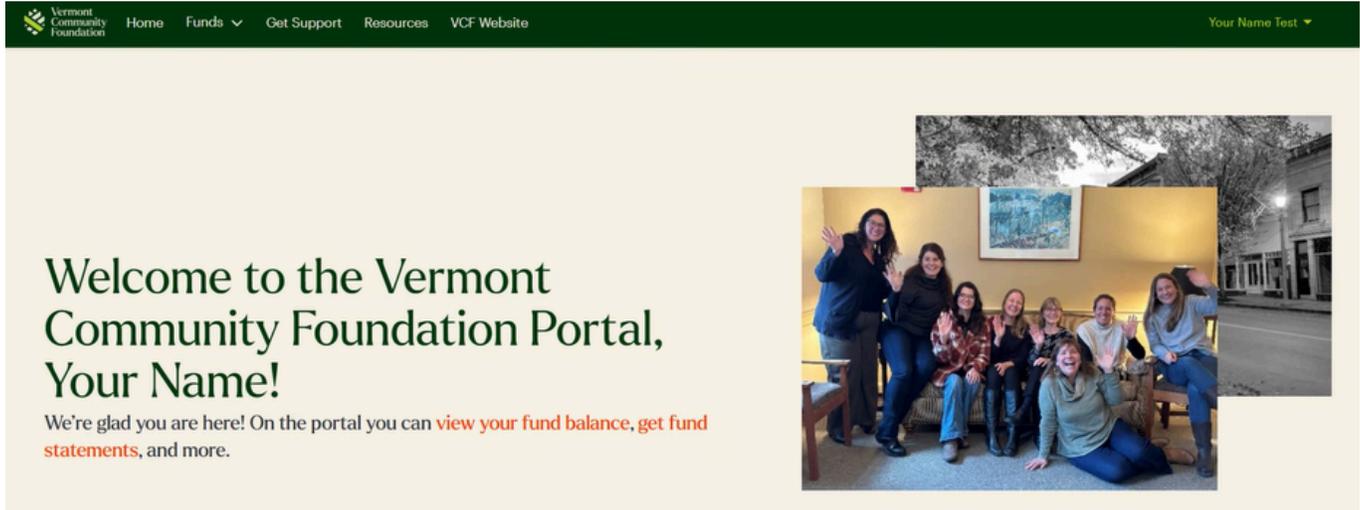
* Current Password	<input type="password"/>
* New Password	<input type="password"/>
* Verify New Password	<input type="password"/>

Access for Other Users

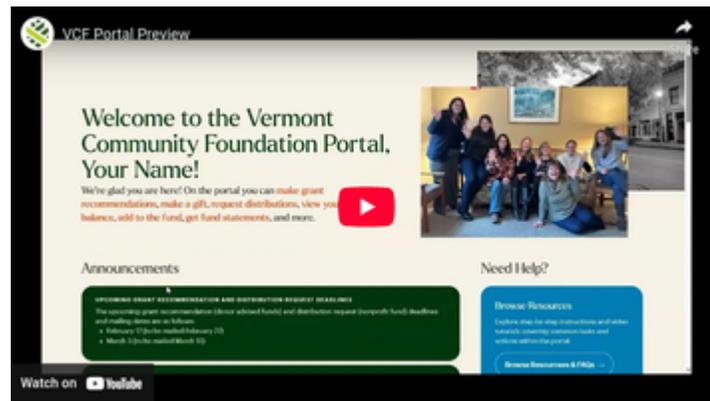
If you would like to give portal access to others, please contact us through the support request form. We'll set up their access for you, including view-only permissions if appropriate. Likewise, feel free to let us know if you would like to remove portal access for someone.

Homepage

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.



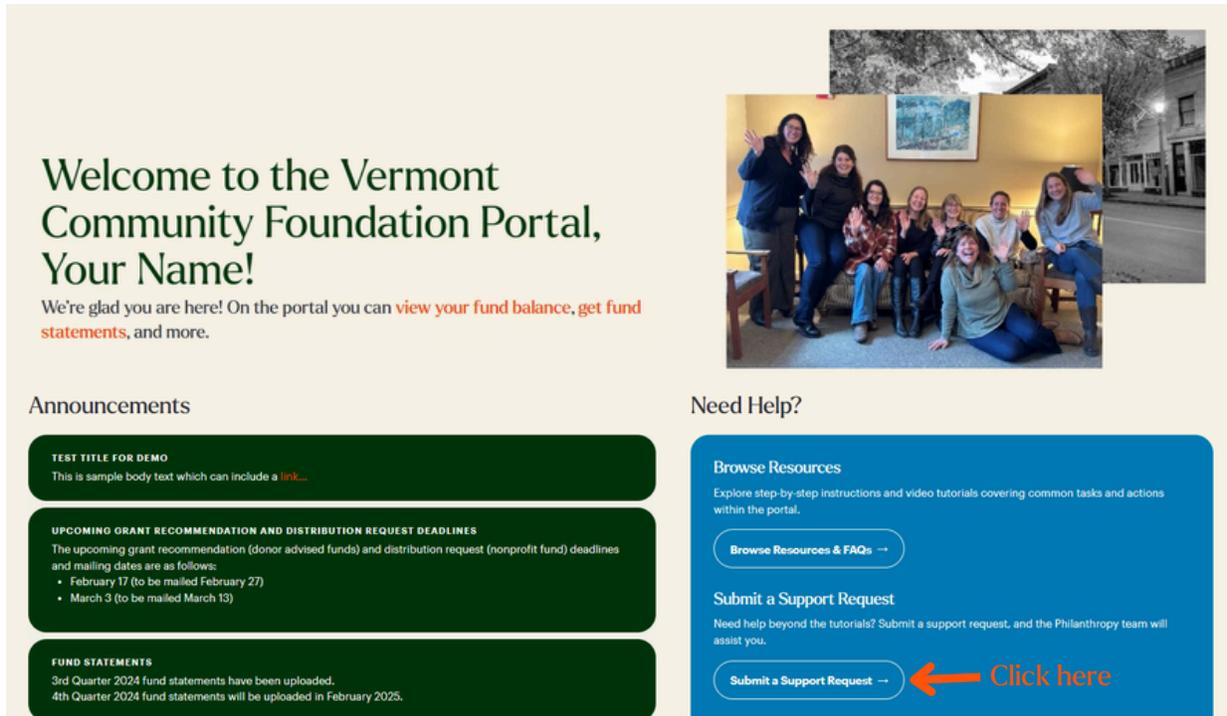
To explore the homepage and see some of its features, check out this [preview video](#):



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

Enter Request Details Below

*Support Type
--None--

*Description

[Create Support Request](#)

[Show Filters](#) [Hide](#)

0 of 0 items

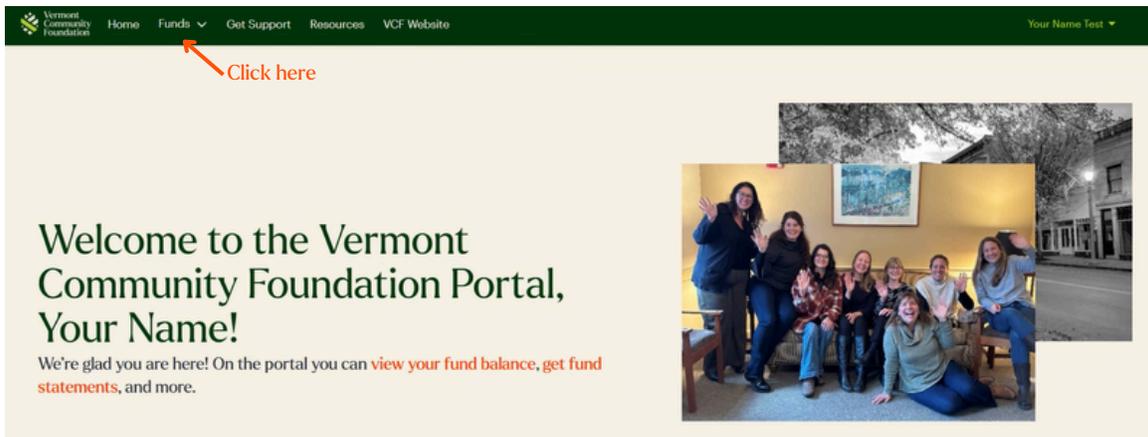
Case Number	Submitted Date	Subject	Case Type	Description	Status
No items to display.					

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.

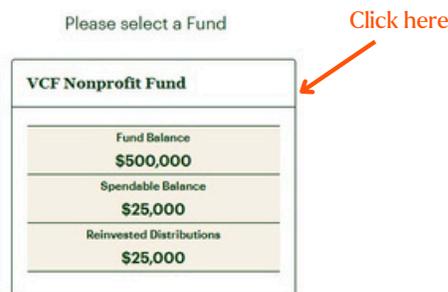
How to See Distribution History

Easily access your distribution history anytime.

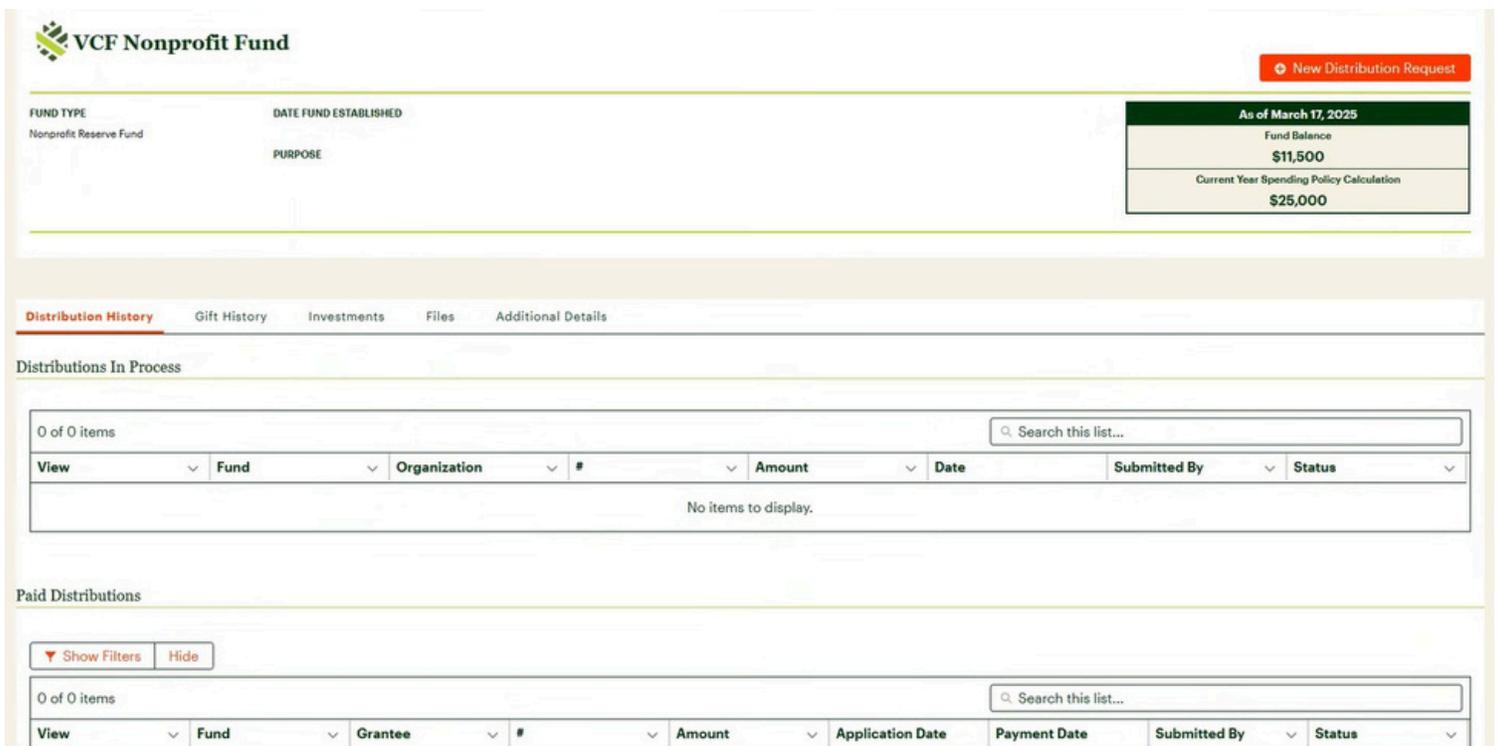
1. Starting on the Home page, click **Funds** under the **Funds** dropdown in the header.



2. Select your fund.



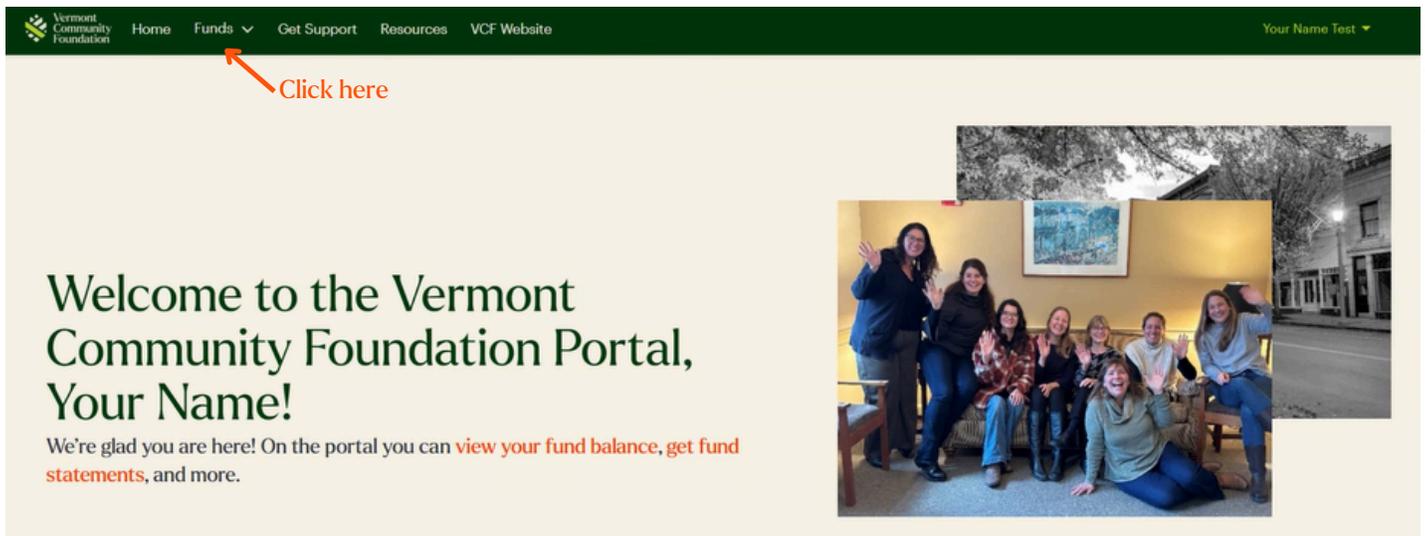
2. View your full Distribution History. You'll see any distributions in process at the top (for example, if a second approval is still pending) and any paid distributions below that.



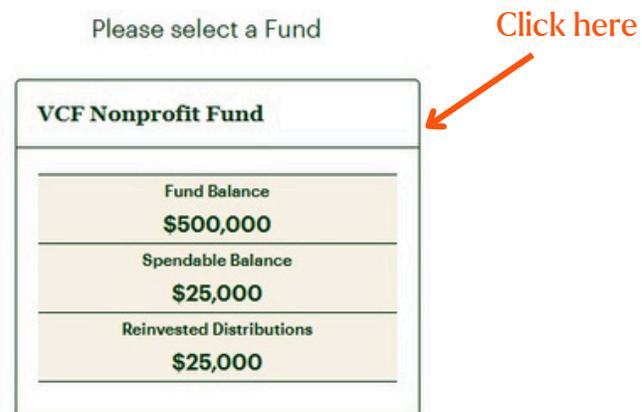
How to See Gift History and Other Fund Details

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.



2. Select your fund.



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.

Show Filters Hide

2 of 2 items

View	Donor(s)	Fund	Type	Payment Method	Date	Amount
View	Your Name and User Test and Other Family Members	VCF Nonprofit Fund	One-time gift	Cash	Feb 28, 2025	\$1,500.00
View	Your Name and User Test and Other Family Members	VCF Nonprofit Fund	One-time gift	Stock	Jan 1, 2025	\$10,000.00

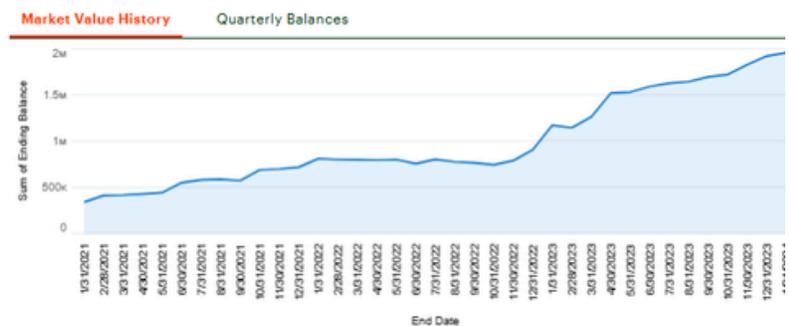
Distribution Summary

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

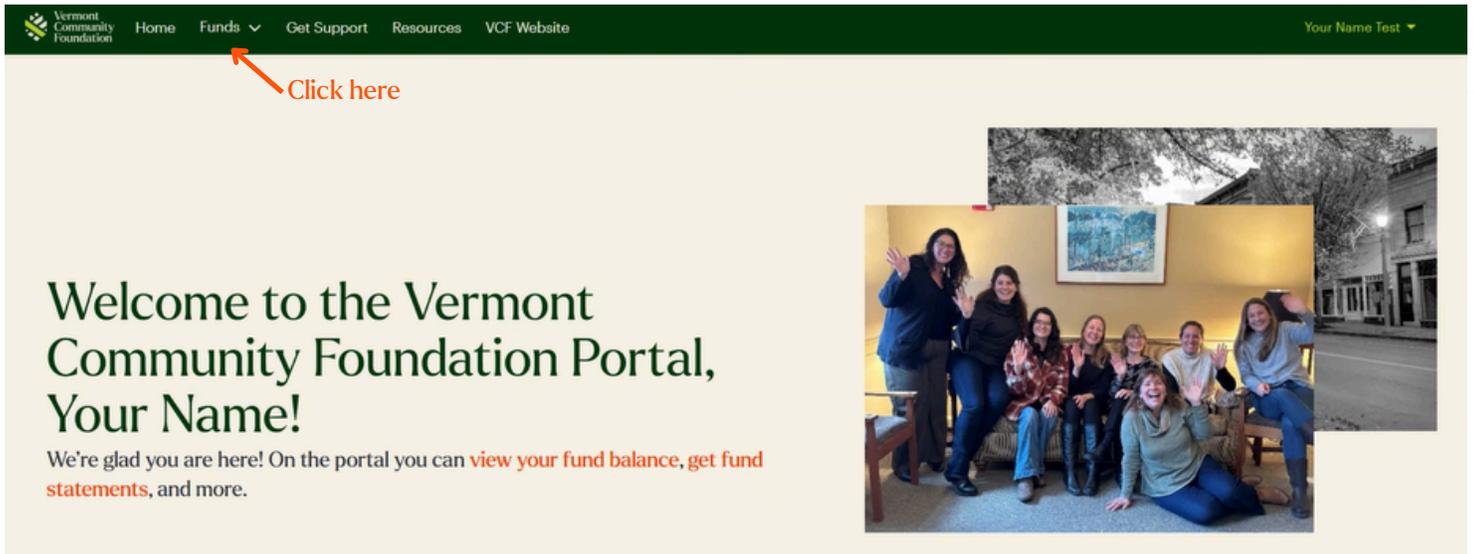


As of Today at 4:06 PM

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.



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