



## IPCF Fund Advisor Portal Information for Users

As a fund holder/advisor, you have an online Fund Advisor Portal where you can access information about the funds you manage. Illinois Prairie Community Foundation will send you a login name and a link to access your Fund Advisor Portal via email. Click the link, and you will be prompted to create your own password to the Fund Advisor Portal site (<https://ipcf.fcsuite.com/erp/fundmanager>). Once your password is created, navigate to the Login page, enter your user name and password and log in.

If you serve as an advisor for multiple funds, you will see the Choose Fund menu once you have successfully signed in to your Fund Advisor Portal. Select the fund with which you wish to interact. If you are a Fund Advisor for one fund, you will be directed to the home page of that fund.

Once you are on a fund's home page, you can select the tabs at the top 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.

- **Home** – This tab shows a summary of the fund's current balance, plus the spendable balance (if applicable) and fund advisors' names. Recent Contributions and Recent Grants are listed as well.
- **Choose Fund** – This tab is visible if you are a fund advisor to other funds.
- **Contributions to Fund** – This tab shows all contributions money that has come into the fund. Click on a contributor's name to bring up their contribution history.
- **Grants Awarded** – This tab shows the grant/distribution history of the fund. Details and information related to the grant/distribution is located by clicking the ID number for each transaction. The blue Copy button allows you to repeat a distribution to the same organization.
- **Request a Grant (Distribution)** – This tab is a form that allows the fund advisor to make a Grant Request to a nonprofit organization or an IPCF fund. Not for reimbursements or paying invoices.
  - A list of grant requests to be paid out, along with their current status, is available. Grants in the Request status can be canceled from this screen.
- Grant Requests can be created.
  - Previous grantees and funds that you have given to can be selected from the drop-down lists.
  - You can create a new nonprofit or grantee manually by entering the name, address, zip code and phone number. These are required to move the request to IPCF for approval and payment.
  - You can Search for other grantees by using the Search box. Enter keywords and then click the Search button. The system will search Candid's Guidestar (an information service specializing in reporting on U.S. nonprofit companies) for organizations containing the keywords you used. The more keywords used, the better the search results will be.
  - Once the grantee information has been added, click the Submit button to complete the request.
- **Quarterly Statements** – This tab allows you to view and download quarterly fund statements starting with the next statement after you receive access to the portal. If you choose to print statements, the system will generate a pdf that you can save or print.
- **Donate Now** – This tab takes you to IPCF's public Online Donations page, where you can make an online gift to your fund.
- **Logout** – Use this tab to close your current login session on the Fund Advisor Portal. You will be automatically logged out each night even if you do not log out.



## IPCF Fund Holder/Advisor Portal Information

### Frequently Asked Questions

***How can I change my profile information (includes login, address, email, phone)?***

Click the Profile link in the upper right area of your Fund Advisor Portal. You can click the Edit button to edit your login, address, email, phone and add a note about the changes you are making. Additionally, you can change your fund advisor portal password and enable two factor authentication when logging in. Click the Save button to keep the changes.

***How do I change my password?***

You may change your password by clicking Forgot Password on the login page for the portal. You may also contact IPCF staff by calling 309-662-4477. Please note that while our staff can assist you in resetting your password, we cannot access your use passwords and cannot look up your current password for you.

***Help, I'm locked out of my Fund Advisor 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're still having trouble, please contact IPCF. Usernames are case sensitive in the Fund Advisor Portal.

***Can I receive email confirmation when I request a grant/distribution or when it is paid?***

IPCF can alert you every time a donation is made or a grant is paid out from your fund. These alerts can be set up or cancelled at any point. Alerts are not retroactive, so you will not be notified of past grants or donations. If you wish to be notified of each donation and/or grant requested and paid, contact IPCF.

***How often are fund statements posted to the portal?***

Fund statements are posted to the portal each quarter, starting with the first quarter after you receive access to the portal. You will receive an email when the fund statements are ready to be viewed in the portal. If you are not receiving these notification emails, please contact IPCF at 309-662-4477.

***I am a Donor Advised Fund advisor and have made a grant recommendation. How long does it take for the grant to be processed?***

Grant recommendations received before 8 a.m. Tuesdays will be processed the same week, with the check being sent out no later than Thursday. For grant recommendations received after the deadline, they will be held for processing the next week. If you have any questions about making a grant recommendation from your Donor Advised Fund, please email us at [ilprairiecf@gmail.com](mailto:ilprairiecf@gmail.com). Please note grant recommendations may only be made to 501(c)(3) organizations (including schools, churches and government entities).

***My nonprofit has a Fiscal Sponsorship (Agency, Field of Interest or Project) fund at IPCF. Can I request payment of invoices or reimbursements through the portal?***

Reimbursements or payment of invoices cannot be requested through the portal. Fund advisors must complete a Fiscal Sponsorship Distribution form, which is available for download on the IPCF website. Original invoices must be submitted to IPCF with the form.

***Who do I contact if I am having issues with the portal?***

Our staff will be happy to assist you with any issues concerning the donor portal or with any questions you might have. Please call us at 309-662-4477 or email us at [ilprairiecf@gmail.com](mailto:ilprairiecf@gmail.com).