

## MYFUND INSTRUCTIONS TO MAKE A GRANT REQUEST

Use these steps to submit a grant request on MyFund for the full or partial distribution amount:

- 1. Login to **MyFund** using your email address and password that you set up.
  - Visit cffound.org > click LOGIN at top of the site > then click MyFund
  - Or access directly: https://cff.fcsuite.com/erp/fundmanager/list
- 2. If you are the fund advisor to multiple funds, you will see all the fund names listed and will need to select which fund you want to put in the grant request for first.
  - Once you have completed the steps below for that fund's grant request, then click on the 'Choose Fund' tab to put in the next grant request for other funds.
- 3. Once you are logged into your fund, you will see the 'Spendable Balance' amount. It is in the middle under 'Current Balance'. Make a note of this amount. This is the amount that is available for you this year.
- 4. Click on the **Grant Request** tab.
- 5. If you took the grant last year, go to 'Grantees you have given to in the past'. Use the drop-down to select your organization name. Proceed to step 11.
- 6. If you have never taken this grant before, proceed to step 7.
- 7. Click on the **Grant Request** tab.
- 8. Go to 'Search for other Grantees' and enter the name of your nonprofit organization.
- 9. Click 'Search'.
- 10. Results will show, then click 'Create Request' to open the form.
- 11. The new **Grant Request** form will open.
- 12. Fill in **Grant Description** with:
  - o [Current Year] Nonprofit Endowment Grant
  - Example: 2021 Nonprofit Endowment Grant
- 13. Fill in the amount with the 'Spendable Balance' that is located on the 'Home' tab.
- 14. Click the 'Review' button.
- 15. Click 'Submit Request' to complete the grant request process. The CFF team will then get the grant processed.
- 16. In MyFund you will see the grant request status is 'Pending' within 24 hours. As soon as the grant is paid you will see the status say 'Complete'.

Questions? Contact Susan Ponce at <a href="mailto:sponce@cffound.org">sponce@cffound.org</a> or by phone at 407-872-3050.