

# MY NTCF FUND

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## USER GUIDE



North Texas Community Foundation's online portal, My NTCF Fund, gives fundholders and advisors secure, 24/7 access to fund information. Within My NTCF Fund, you can easily check your fund balance, view and download fund statements, request and track grants, add to your fund and more.

# Accessing the Portal

## INITIAL LOGIN PROCESS AND CREATING YOUR ACCOUNT

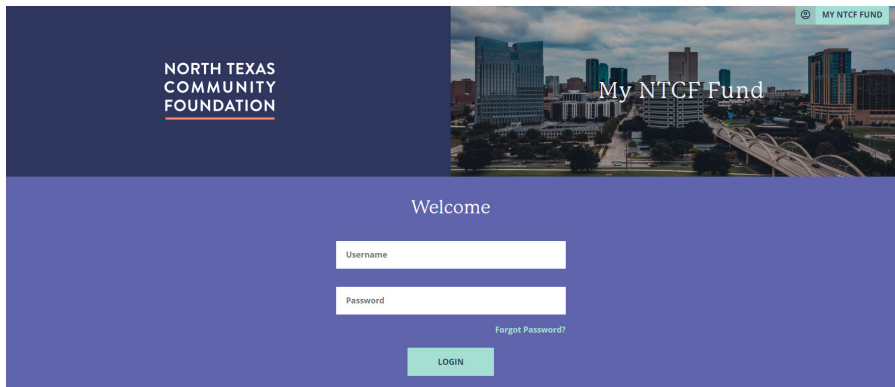
You will receive an automated email from sender “no-reply@fcsuite.com” with “North Texas Community Foundation” referenced in the subject line. The automated email will instruct you on the steps to create a custom password specific to your fund(s). Your username will be the primary email address we have on file.

Once you click on the invitation link in the email, you will be prompted to create a password of your choice. Your password must contain at least 12 characters and 3 of the following:

- Capital letter
- Lowercase letter
- Number
- Special character (!, #, %, etc.)

**Please write down your password and put it somewhere you will remember.**

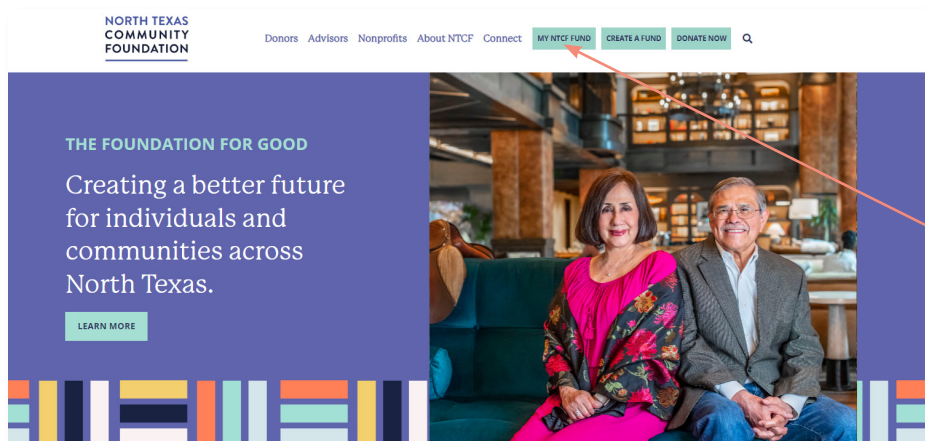
The link contained in the initial automated email can only be used once to establish your initial password and will expire after 30 days.



**IMPORTANT:** If you access My NTCF Fund from a shared computer or device, we strongly encourage you to use the logout option after completing each session. This ensures no one other than you has access to the system.

## RETURNING USERS

To access the portal at any time (following the initial setup), simply visit northtexascf.org and click on the My NTCF Fund button at the top right corner of our website. This will take you to the login screen where you will enter your username and password established in the step outlined above.



# Navigating My NTCF Fund

Once you are logged in, your fund's homepage will appear. If you manage multiple funds, you will see a "Choose Fund" menu. Choose the fund you wish to review from the drop-down menu.

If you are listed as an advisor for only one fund, you will not have the "Choose Fund" menu but instead will see only your account information.



The tabs at the top of the page display different features available to you as a Fund Advisor:

**HOME** - Your homepage is a quick snapshot of your fund's most recent activity. This tab shows your fund's current balance, recent contributions and grant history.

**CHOOSE FUND** - This tab is only visible if there are multiple funds to select and view.

**CONTRIBUTIONS** - All gifts made into your fund appear in this tab, unless the donor requested to give anonymously.

**GRANTS** - All grants awarded from your fund including date, organization name, purpose, and amount are listed in this tab. The top section provides a summary of grants by grantee. Scroll past the summary section to see grants listed chronologically from most recent to oldest.

**GRANT REQUEST** - Click here to make a grant request from your fund and track the statuses of your recent grants. Note: online grant requests are only available to Donor Advised Funds.

**STATEMENTS** - Here you can view, download and print fund statements.

**FILES** - Contains wiring and stock delivery instructions along with other helpful documents.

**DONATE** - Opens a new window for you to contribute to your fund, or other funds managed at North Texas Community Foundation. You may also set up a recurring donation.

**INVESTMENTS** - View more in depth information about your fund balance.

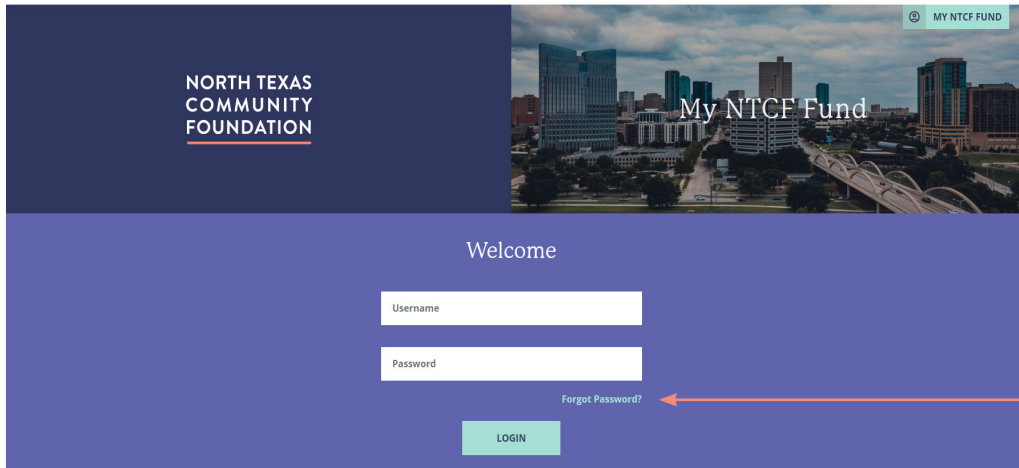
**LOGOUT** - Remember to click "Logout" to close My NTCF Fund. You will be automatically logged out after a period of inactivity even if you do not logout.

**EXPORT** - This tab only shows when you are in the Contributions and Grants tabs. It produces an excel spreadsheet with the contribution or grant information.

# Frequently Asked Questions

## ***What if I forget my password?***

On the login page, click “Forgot Password.” Enter the username of your account, which is the email address NTCF has associated with your profile and click Reset Password. Check your email for password assistance. For security reasons, NTCF staff cannot reset your password for you, but we can help you navigate the process if you need assistance.



**Note: My NTCF Fund will lock you out after five unsuccessful login attempts.**

If you need assistance or are locked out of My NTCF Fund, please contact our team at 817.877.0702 or email [support@northtexascf.org](mailto:support@northtexascf.org).

## ***Where do I find my fund balance?***

The **Home** tab of the portal displays the current fund balance as well as the balance available to grant. You will also see the date the fund was established, total contributions to the fund and total grants made from the fund.

If you have a non-endowed fund and see a difference between the spendable balance and the current fund balance, that may be due to scheduled grant payments.

### Grant Family Foundation Fund

Questions? Please reach out to your designated contact:

Amy Radcliffe

[aradcliffe@northtexascf.org](mailto:aradcliffe@northtexascf.org)

Date Created: 12/01/2022

Current Balance: \$170,195.70

Available Cash: \$170,195.70

Total Contributions: \$183,031.99

Total Grants: \$14,200.00

Fund Advisors are: Grant, Anita

## How do I make a grant?

After logging in to My NTCF Fund and selecting the fund from which you want to recommend the grant, there are multiple ways you can start the grant recommendation process:

From the **Grant Request** tab, you may:

1. **Choose a previous Grantee** from one of the drop-down menus;
2. **Search for other Grantees** by typing keywords that allow Guidestar, an information service specializing in reporting on U.S. nonprofits, to search for organizations containing those keywords. The more keywords you provide, the better the search results will be;
3. **Enter Grantee information** manually.

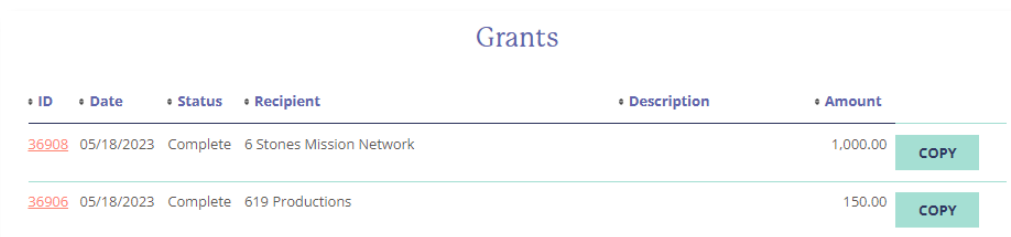
Once you select the grantee, the system will automatically move to a screen where you can indicate:

- a **description** to let the grantee know how grant is to be used;
- the **amount** (the minimum grant amount is \$250);
- whether you want the grant to remain **anonymous**;
- if you want to make this a **recurring** grant. *If you choose this option, you will need to enter the grant start date, recurrence interval (monthly, quarterly or yearly), and the number of recurrences. By entering a number in the **Number of Recurring** box, the total of the indicated payments will be deducted from your fund balance. If you choose to leave the number of occurrences blank, only individual payments will be taken from your fund balance at the time of payment. For this option, payments will continue to distribute based on your specifications until you contact NTCF to stop the payments. We recommend scheduling recurring grants for no longer than 2 years and then reevaluating the recurrence schedule. If you do not want this to be a recurring gift, please skip this step.*
- additional **notes** you want our staff to see before processing your grant request.

Please **review** the request, then click “**Submit.**”

You will now see your request appear in the list of grants on the right-hand side of the Grant Request page.

Alternatively, if you wish to copy a previous grant, you may do so from the **Grants** tab.



ID	Date	Status	Recipient	Description	Amount	
36908	05/18/2023	Complete	6 Stones Mission Network		1,000.00	<a href="#">COPY</a>
36906	05/18/2023	Complete	619 Productions		150.00	<a href="#">COPY</a>

## When will my grant be processed?

Grants are processed on a weekly basis. Grants requested by 5:00 pm on Monday will be processed by Friday.

Please allow 10-12 business days to reach the grantee; delivery of grants is dependent upon the postal service.


You will receive an email confirmation **once the grant has been submitted for payment**. You are always able to check the status of a grant via My NTCF Fund.

## How can I check the status of a grant?

The **Grant Request** tab will also show a list of grants requested to be paid along with their current status. Under the Status column, you will see one of six statuses for each grant:

- **Request** means that your grant request has been sent to our team. If you would like to cancel a pending grant request before it is processed, click the yellow Cancel button.
- **Cancelled** means your grant request has been cancelled.
- **Pending** means that our team is currently processing your grant request.
- **Approved** means your grant request has been approved but not yet paid.
- **Paid** means that the grant request has been approved and a check has been sent to the organization.

Once a grant recommendation has been paid, the grant will appear in the **Grants** tab.

05/02/2023	Pending	North Texas Family Service	Back 2 School Drive	250.00	
05/02/2023	Paid	Oakland Family Services		250.00	
05/01/2023	Approved	The Fund for Public Schools - WTC School Relief Fund		1,000.00	

## Where can I find my fund statement?

Fund statements are posted monthly under the **Statements** tab. You will be notified via email when your fund statement is ready to be viewed in My NTCF Fund.

## Can I download a list of my grantees or contributions?

You may use the **Export** tab to download all transactions from the Contributions or Grants tabs. Doing so will generate and download a CSV file.

## How do I manage my contact information?

To change your contact information, please contact our Donor Relations Team or email [support@northtexascf.org](mailto:support@northtexascf.org).

## Who do I contact if I have additional questions?

For other questions or assistance, please email [support@northtexascf.org](mailto:support@northtexascf.org) or call 817.877.0702.

# NORTH TEXAS COMMUNITY FOUNDATION

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