

# MyFund Portal Overview for LVCF Fund Advisors



Connecting Donors Who Care with Causes that Matter



## FAQ's About the Lehigh Valley's Online Portal for Fund Advisors

The Lehigh Valley Community Foundation's online portal was designed so that fund advisors have secure, 24/7 access to monitor their fund and recommend grants using an intuitive online platform. Our staff has worked diligently to ensure MyFund Portal's ease-of-use and functionality, but we know that any change can be challenging to navigate. As you explore the portal, we anticipate that you may still have questions and have tried to anticipate many of those in this document.

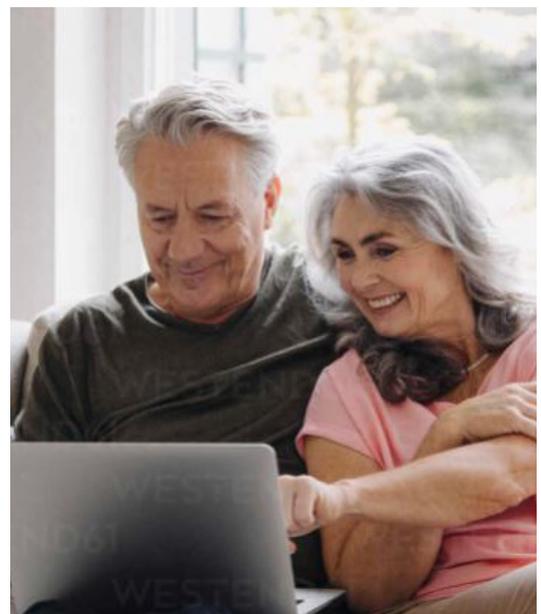


If you need further assistance don't hesitate to contact Carrie Krug Nedick, Director of Donor Services by email: [carrie@lvcfoundation.org](mailto:carrie@lvcfoundation.org)

### About the Lehigh Valley Community Foundation

At the Lehigh Valley Community Foundation, we connect donors who care with causes that matter. A leader in charitable giving in the Lehigh Valley for more than 50 years, we receive support from donors, manage funds to grow over time, and make high-impact grants to strengthen local nonprofits.

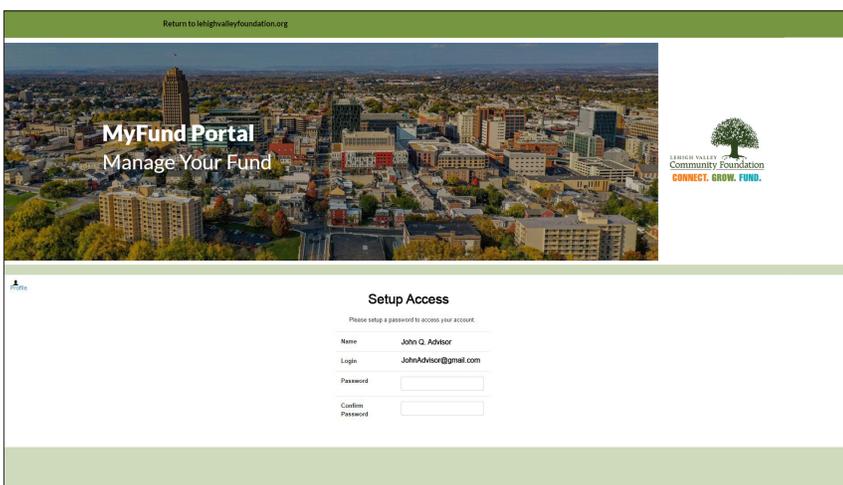
The Foundation manages more than 300 charitable funds, totaling over \$80 million, and we continue to grow—both in size and in the ways we fulfill our mission. We are evolving to engage more deeply with partners, serve more effectively as a thought leader on community issues, and explore more innovative ways to make life better across the Lehigh Valley.



## MyFund Portal Launch - November 1, 2023

The new MyFund portal is live as of November 1. On that date, authorized contacts for funds of the Lehigh Valley Community Foundation will have received an e-mail with instructions on how to create a custom password. If you are an authorized fund contact and did not receive that email, please check your spam or junk e-mail folder. Please delete this automated email once you have successfully completed this process. The link contained in the email should only be used once, for establishing your initial password.

## How do I Log-in the First Time



Return to lehighvalleyfoundation.org

**MyFund Portal**  
Manage Your Fund

LEHIGH VALLEY  
Community Foundation  
CONNECT. GROW. FUND.

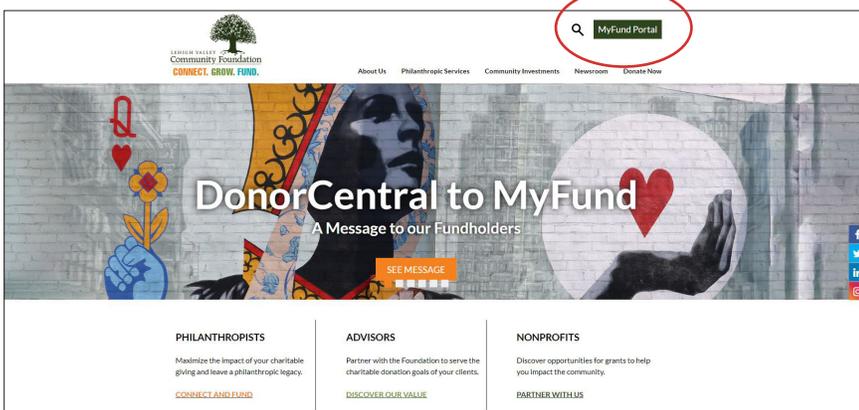
**Setup Access**  
Please setup a password to access your account.

Name: John Q. Advisor  
Login: JohnAdvisor@gmail.com  
Password:   
Confirm Password:

### Establish Your Password

You will receive an email from sender no-reply@fcsuite.com, with “The Lehigh Valley Community Foundation” referenced in the email’s subject line. The email will provide a link to the portal where you will establish your login credentials. Follow the instructions to create a password for your account in the portal. Take note of your username (which is your email address) and password as you complete this process.

## Where Can I Gain Easy Access to the MyFund Portal



### Easy Access at [www.lvcfoundation.org](http://www.lvcfoundation.org)

Once you have followed the instructions in that email to set up your password, you can access the portal by visiting [lvcfoundation.org](http://lvcfoundation.org) and clicking MyFund portal button in the upper right hand corner of the page.

Our staff has worked diligently to migrate our database and is excited about its ease-of-use and functionality, but we know that any change can be challenging to navigate. As you explore the portal, we anticipate that you may still have questions or need assistance, and we are here for you. To better serve you and to provide the latest information, we have developed this FAQ, which serves as a quick-reference guide and additional resources, which can be found below, to support your use of the MyFund portal.

# MyFund Portal Overview for LVCF Fund Advisors



## 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. Just below the spendable balance you will see the names of fund advisors for the fund.

If there is a difference between the spendable balance and the current fund balance, that is due to scheduled grant payments.

LVCF - Family Impact fund

Home Choose Fund Gifts Grants Grant Recommendations Donate Logout

Please use this form to recommend a grant from your fund. You can start by:

- 1) Choosing a Grantee that you have given to in the past. or
- 2) Searching our databases for a New Grantee (we highly recommend doing this before Entering a New Grantee Manually) or
- 3) Entering a New Grantee Manually and CLICK SUBMIT

Grants already processed from your fund are listed.

**Choose from previous Grantee**

Grantees you have given to in the past

Other foundation funds

or

Search for other Grantees

**Grants**

Date	Status	Recipient	Description	Amount
10/18/2023	Paid	YWCA of Bethlehem	Luncheon sponsorship	2,500.00
09/08/2023	Complete	Bach Choir of Bethlehem	Guarantor program	250.00
05/04/2023	Complete	Bach Choir of Bethlehem	Board appeal	1,000.00
03/22/2023	Complete	United Way of the Greater Lehigh Valley	Women United	1,000.00
03/15/2023	Complete	Wildlands Conservancy	continued support of Carson and Strig (the birds)	1,000.00
12/31/2022	Complete	Shanthi Project	General	250.00

## How do I make a grant?

After logging in to MyFund Portal and selecting the fund you from which you want to recommend this grant, there are four ways you can start the grant recommendation process:

From the Grant Request tab, you may:

- **Choose a previous Grantee** from one of the drop-down menus
- **Choose another fund** at the Community Foundation, like our Unrestricted Fund that supports operations.
- **Search for other Grantees** by typing keywords that allow **Guidestar**, an information service specializing in reporting on U.S. nonprofit organizations, to search for organizations containing those keywords. The more keywords you provide, the better the search results will be.
- **Enter Grantee information manually**

## MyFund Portal Overview for LVCF Fund Advisors

ID	Date	Status	Recipient	Description	Advisor	Amount	
11065	10/18/2023	Paid	YWCA of Bethlehem	Luncheon sponsorship	Family Legacy Household	2,500.00	<a href="#">Copy</a>
10999	09/08/2023	Complete	Bach Choir of Bethlehem	Guarantor program	Legacy CPA, Mrs. Family R.	250.00	<a href="#">Copy</a>
10700	05/04/2023	Complete	Bach Choir of Bethlehem	Board appeal	Legacy CPA, Mrs. Family R.	1,000.00	<a href="#">Copy</a>
10650	03/22/2023	Complete	United Way of the Greater Lehigh Valley	Women United	Legacy CPA, Mrs. Family R.	1,000.00	<a href="#">Copy</a>
10639	03/15/2023	Complete	Wildlands Conservancy	continued support of Carson and Strig (the birds)	Legacy CPA, Mrs. Family R.	1,000.00	<a href="#">Copy</a>
10537	12/31/2022	Complete	Shanthi Project	General	Legacy CPA, Mrs. Family R.	250.00	<a href="#">Copy</a>
10312	11/15/2022	Complete	Junior League of the Lehigh Valley	Impact Fund	Legacy CPA, Mrs. Family R.	350.00	<a href="#">Copy</a>

From the Grants tab, you may also choose to copy a previous grant in the bottom section entitled Grants.

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

- a description to let the grantee know how grant is to be used;
- the amount;
- whether you want the grant to remain anonymous;
- **if you want to make this a recurring gift;** If you choose to make a recurring gift, you will need to add when you would like this to begin, how often you would like this to go out and how many occurrences you would like to make. By entering a number in the Number of Recurring box, the total of the indicated payments will be taken from your fund balance. By leaving 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 LVCF to stop the payments. If you do not want this to be a recurring gift, please skip this step.
- any 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.

### When will my grant be processed?

Grants are processed on a weekly basis. Grants requested by Monday will be sent out via ACH the following Monday. If payment cannot be remitted via ACH, a check will be processed. Payments made via ACH generally take 5 -7 business days to reach the grantee; delivery of grants paid by check are dependent upon the postal service and a range of factors beyond our control. You will receive an email confirmation once the grant has been submitted for payment, but you are always able to check the status of a grant via the portal.

## 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. Grant requests still in the Request stage can be canceled from this screen by clicking the Cancel button.

### LVCF - Family Impact fund

Home Choose Fund Gifts Grants Grant Recommendations Donate Logout

Please use this form to recommend a grant from your fund. You can start by:

- 1) Choosing a Grantee that you have given to in the past. or
- 2) Searching our databases for a New Grantee (we highly recommend doing this before Entering a New Grantee Manually) or
- 3) Entering a New Grantee Manually and CLICK SUBMIT

Grants already processed from your fund are listed.

**Choose from previous Grantee**

Grantees you have given to in the past

Other foundation funds

Date	Status	Recipient	Description	Amount	
10/30/2023	Request	Bethlehem Rotary Foundation		250.00	<a href="#" style="background-color: yellow; border: 1px solid red; border-radius: 50%; padding: 2px 5px;">Cancel</a>
10/18/2023	Paid	YWCA of Bethlehem	Luncheon sponsorship	2,500.00	
09/08/2023	Complete	Bach Choir of Bethlehem	Guarantor program	250.00	
05/04/2023	Complete	Bach Choir of Bethlehem	Board appeal	1,000.00	

Once a grant recommendation has been paid, the grant will appear in the Grants tab, which is organized first by a Grant Summary of all grants paid to each organization, then an individual listing of all grants made from the fund over the past five years. **Please note:** the Grant Date shown is the date the grant request was submitted by the fund advisor and will not change as the status of the grant changes.

### LVCF - Family Impact fund

Home Choose Fund Gifts Grants Grant Recommendations Donate Logout [Export](#)

#### Grantee Summary

Grantee	Grants	Amount
American Junior Golf Association	1	250.00
ArtsQuest	1	500.00
Bach Choir of Bethlehem	12	8,000.00
Bethlehem Rotary Foundation	1	1,250.00
Bloom for Women, Inc.	1	2,100.00

## 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 or Excel file.

## MyFund Portal Overview for LVCF Fund Advisors

Return to [lehighvalleyfoundation.org](http://lehighvalleyfoundation.org)

# MyFund Portal

## Manage Your Fund



Profile

Michael@lvcfoundation.org

.....

[Forgot Password?](#)

Login

Welcome to LVCF's MYFund donor portal. If you have questions or need help with logging-on, please contact us at 610 351-5353 or send an email to [carrie@lvcfoundation.org](mailto:carrie@lvcfoundation.org).

If you prefer to mail a donation, please send all check payments to Lehigh Valley Community Foundation, 840 W. Hamilton Street, Suite 310, Allentown, PA 18101 and specify the fund to which the donation should be applied.



### What if I forget my password?

On the login page, click “Forgot Password.” Enter the username of your account, which is the email address. The system will send you an email to reset your password.

Use the email that the Lehigh Valley Community Foundation has associated with your profile and click Reset Password. Check your email for password assistance.

For security reasons, LVCF staff will not be able to reset your password for you, but we can help you navigate the process if you need assistance, contact Carrie Krug Nedick, Director of Donors Services and alert her to any issue you may have with the portal.

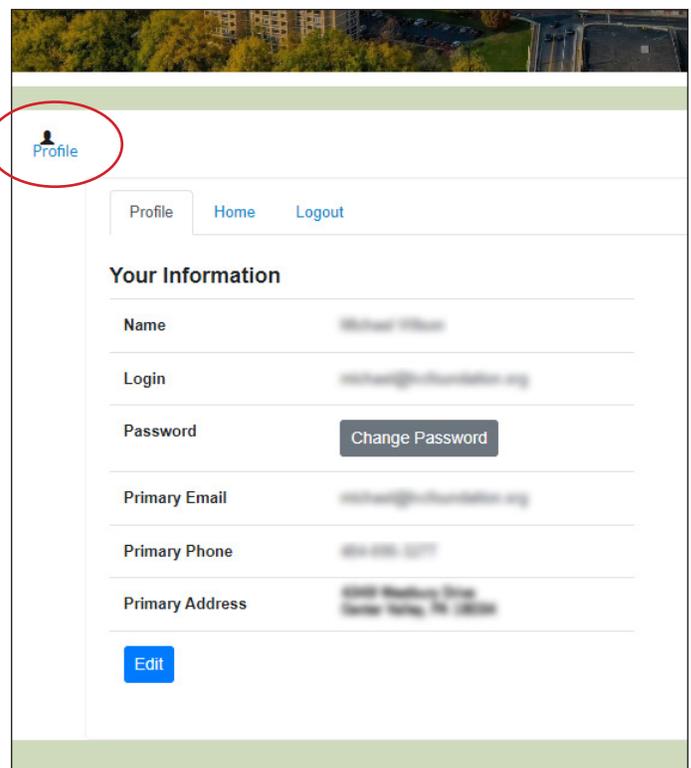
### How do I manage my contact information?

To change your contact information, or to add or remove advisors from the fund, please contact Carrie Krug Nedick, Director of Donors Services, at [carrie@lvcfoundation.org](mailto:carrie@lvcfoundation.org).

If you are a fund advisor who is logged into the portal, you can update your personal information by clicking on the Profile link in the upper left corner of the page. There you can update your password and/or change other personal information.

### I don't want to use the portal. Is there another way to access my fund?

If you wish to bypass the portal, please allow our team to assist you with processing grants from your fund, providing historical data or grant status. Please send your request to [carrie@lvcfoundation.org](mailto:carrie@lvcfoundation.org).



Profile

Home Logout

### Your Information

Name

Login

Password [Change Password](#)

Primary Email

Primary Phone

Primary Address

[Edit](#)



Lehigh Valley Community Foundation  
840 W. Hamilton Street, Suite 310, Allentown, PA 18034

610 351-5353 | [www.lvcfoundation.org](http://www.lvcfoundation.org) | [info@lvcfoundation.org](mailto:info@lvcfoundation.org)

Lehigh Valley Community Foundation is a 501(c)3 nonprofit organization. All donations are tax deductible. EIN: 23-1686634



LEHIGH VALLEY  
**Community Foundation**

**CONNECT. GROW. FUND.**