Community Foundation
of Greater Chattanooga

1400 Williams St.
Chattanooga, TN 37408

info@cfgc.org
(423) 265-0586

cfgc.org

Frequently Asked Questions and Helpful Hints

I forgot my password to the Fund Portal. What do I do?

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 the Community Foundation of Greater Chattanooga at 423-265-0586 or donorservices@cfgc.org.

Generosity Changes Everything

pebbles.flinstone

Password

Forgot Password?

Login

If you need to reset your password please contact us at 423-265-0586.

I never received my password reset email. What do I do?

If you have not received a password reset email, please check your junk or spam box in your email account. If you still do not see a reset email, please contact the Community Foundation of Greater Chattanooga at 423-265-0586 or donorservices@cfgc.org.

I forgot my username. What do I do?

Please contact the Community Foundation of Greater Chattanooga at 423-265-0586 or donorservices@cfgc.org.

If I am an advisor to multiple funds and can see activity on each fund, does that mean that other advisors to those same funds have access to my personal information or personal fund?

No. Fund advisors are only able to see information on funds for which they are a current named advisor. While fund advisors are able to see who the other fund advisors on the fund are, they are not able to see one another's personal information, or access funds for which they are not a current and named advisor.

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I do not see the option to make a Grant Recommendation from my Fund Portal. Am I missing something?

Not all Funds have the option to make grant recommendations from the online Fund Portal.

- Fund Advisors wishing to make grant recommendations or pay invoices from a Fiscal Sponsorship (Project) Fund should contact projectservices@cfgc.org.
- Fund advisors wishing to make grant recommendations from Scholarship Funds should contact rsuttles@cfgc.org.

If you're uncertain what type of Fund you advise, or need further assistance, please contact the Community Foundation of Greater Chattanooga at 423-265-0586 or donorservices@cfgc.org.

On the New Grant Request page, there is an option to attach a file to my grant request. What might go there?

Attaching a file is completely optional, and you may never need to use that function at all. Sometimes people like to include information provided by the grantee organization that can later be referenced for historical information on the grant. Please note that we do not receive notification of files attached so this is for informational purposes only, not creating action items.

On the Contributions page, there is a column titled Description, but it is blank. Am I missing something?

Some contributions to funds have notes specific to the transaction, but most do not. Do not be surprised if that space is blank.

I have a recurring grant scheduled and I would like to make a change. How do I do that?

Recurring grants are not currently able to be edited from the Fund Portal. If you would like to make changes to a recurring grant, please contact us at donorservices@cfgc.org or 423.265.0586 so that we can assist you in making those changes.

I do not see a place to list the EIN for a new 501(c)(3) organization to which I wish to donate. Where do I add that?

When making a grant recommendation to a new organization, you can use the box to "Search for other Grantees". This will first search the Community Foundation of Greater Chattanooga database to see if it is an organization to which we have distributed a grant in the past. If it is not, the system will search the national database GuideStar. GuideStar is an information service specializing in reporting on U.S. nonprofit companies. In either case, if the organization can be found, the EIN will be automatically brought into the system. You will not be able to see it, but our finance team will.

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Test Fund

Home | Choose Fund | Contributions | Historical Grants | **Make Grant Recommendations** | Fund Statements | Files | Donate To A Fund | Logout

Generosity Changes Everything

Use this form to make a new grant recommendation or contribution from your fund. You may select a grantee from one of the drop-down menus or enter a new nonprofit. Pending and processed grants will both appear to the right. Grant recommendations for which the status shows as "Request" may be modified. The Community Foundation of Greater Chattanooga will receive notification of your request and process your grant recommendation. We will notify you once the grant has been completed.

Choose from previous Grantee

Grantees you have given to in the past

[dropdown]

Other foundation funds

[dropdown]

or

Search for other Grantees

Name [   ] [Search]

or

Grants

⊕ Date	⊕ Status	⊕ Recipient	⊕ Description	⊕ Amount	⊕
09/20/2020	Request	Fund for Chattanooga	Unrestricted	1,000.00	Cancel
08/27/2020	Complete	Community Foundation of Greater Chattanooga, Inc.	Office Renovation	15,000.00	

If the organization is unable to be located in either the CFGC or GuideStar database, you may enter the EIN in the Questions Box at the bottom of the New Grant Request screen.

Test Fund

Home | Choose Fund | Contributions | Historical Grants | **Make Grant Recommendations** | Fund Statements | Files | Donate To A Fund | Logout

Generosity Changes Everything
New Grant Request

Grantee	Community Foundation of Greater Chattanooga, Inc.
Description	[ ] 0/255 characters
Amount	[ ]
Anonymous	☐
Recurring	☐
Attachment	Choose Files No file chosen (or drag and drop anywhere on the page)
Attachment Description	[ ]
Unless you select Anonymous (above), your grant will be acknowledged by your Fund and Fund Advisor name. If you have questions, please list those here:	[ ]

[Review]

Grants

⊕ Date	⊕ Status	⊕ Recipient	⊕ Description	⊕ Amount	⊕
09/20/2020	Request	Fund for Chattanooga	Unrestricted	1,000.00	Cancel
09/20/2020	Approved	Community Foundation of Greater Chattanooga		1,000.00	
08/27/2020	Complete	Community Foundation of Greater Chattanooga, Inc.	Office Renovation	15,000.00	

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I just entered a grant request, but it doesn't look like it happened. Do I need to do something else?

Submitting a grant request through the online system does not complete the transaction. It sends a message to the Community Foundation of Greater Chattanooga that you would like for the grant to be processed, and we will get going on it. If you'd like to confirm, check the list on the right-hand side on the Grants Request page. Your requested grants will be listed there in "Request" status as soon as you make it. You will also be able to follow the progress of the grant request as it moves through our system to completion.

Oops! I submitted a grant request, but I think I made a mistake. Can I change it?

If the grant is still in "Request" status (check the list on the right-hand side of the Grants Request page), you can click "Cancel" to remove the grant request. Then, start over with a new request. If the grant request is no longer in the "Request" status, but is not in the "Paid" or "Complete" status, please contact us immediately to see if changes can be made.

When I click on the "Anonymous" button, does that mean that my fund name is hidden from the grantee or just my name?

Clicking on the "Anonymous" box will cause the acknowledgement to list the grant from an "Anonymous Fund" and will not list the Fund Advisor name. If you wish something different, please contact us at donorservices@cfgc.org or 423.265.0586 to discuss.

I would like to make a gift to my fund online. How do I do that?

You can make a contribution to your own Fund by clicking on the "Donate to a Fund" tab. Once you locate your fund, click the "Donate" button and follow the prompts in order to make a contribution by credit card. Please note that the funds are sorted by category.

I would like to get a direct link to my Fund to promote elsewhere so that others may donate to my Fund. How do I do that?

Please contact the Community Foundation of Greater Chattanooga at 423-265-0586 or donorservices@cfgc.org.

Why is the Files tab empty?

This tab may be empty if neither the Fund Advisors nor the Community Foundation has uploaded any files.

Will I receive an email notification when my fund's quarterly statement is posted? If not, how will I know when it happens?

By default, you will receive an email from our system as soon as quarterly statements have been posted. You can log into your portal and view them under the "Fund Statements" tab. However, if you have let us know that you prefer statements to be mailed or if that becomes your preference in the future, we can mail them to you.

I want to view my Fund Statement, but only see the option to print. What do I do?

When you click on the "print" option, the system will automatically open a PDF version of the Statement. You will be able to view the statement without having to print it. You can also save the PDF to your computer for later review and / or printing.

If I am aware that a contact person or address for an organization to which I wish to make a grant recommendation has changed, how do I inform the Community Foundation of that change?

Please contact the Community Foundation of Greater Chattanooga at 423-265-0586 or donorservices@cfgc.org.