My TDF **Login**

FAQs about The Dallas Foundation's Online Portal

TheDallasFoundation

My TDF **Login**

FAQs about The Dallas Foundation's Online Portal

The Dallas Foundation's online portal offers you, as fund advisors, secure, 24/7 access to monitor your fund and recommend grants using an intuitive online platform. Our staff has worked diligently to ensure My TDF Login'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.

About the Foundation

The Dallas Foundation brings together people, ideas, and investments in Greater Dallas so individuals and families can reach their full potential. Working closely with our donor partners, we share our expertise, leadership, and the opportunity to co-invest in solutions that match their interests and make a meaningful difference. We also support programs that benefit children ages birth to three as well as the civic priorities of Dallas, and prioritize partnerships that reduce intergenerational poverty and meet today's pressing needs while positioning Greater Dallas for a brighter, more equitable tomorrow.

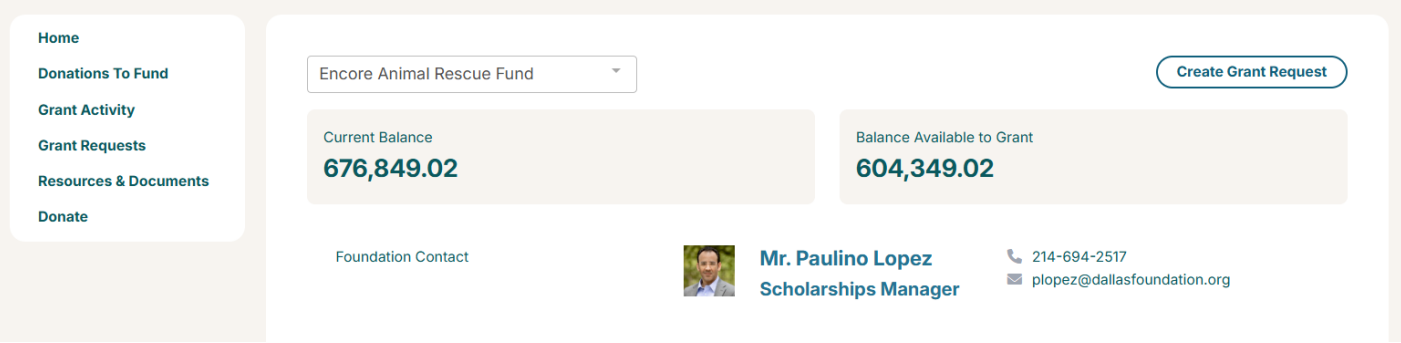
#HereforGood

GENERAL FAQS

Where do I find my fund balance?

The **Home** tab of the portal displays the current fund balance as well as the spendable balance available to grant. You will also see recent contributions to the fund and recent grants made from the fund. Just below the spendable balance you will see the name of the foundation contact for your fund.

If the current fund balance and the spendable balance don't match, this is due to scheduled grant payments. Please note that to avoid arrears, the minimum fund balance is set at $2,500 which will also impact the spendable balance.

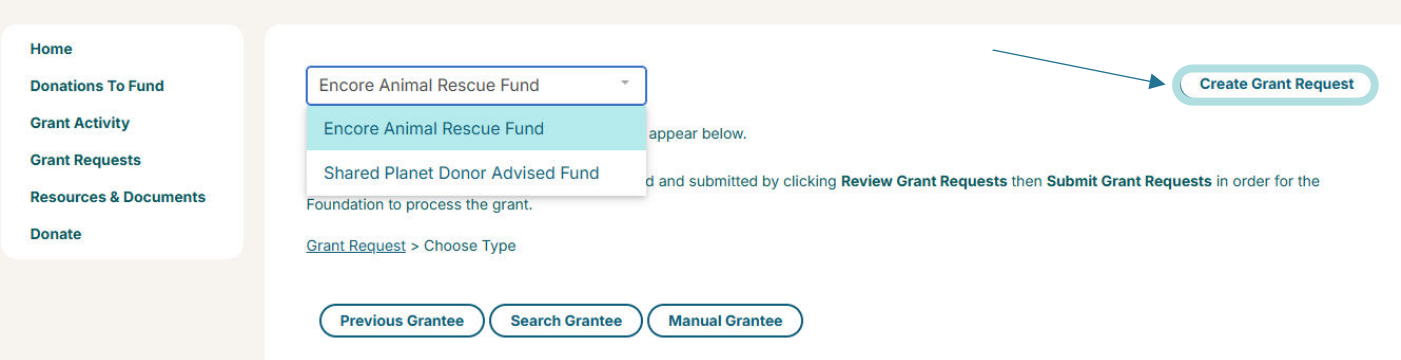


How do I recommend a grant?

Once you've logged in to My TDF Login and, if you have more than one fund at the Foundation, selected the fund from which you want to make your grant recommendation, you may click **Create Grant Request** from the upper right-hand corner of any page.

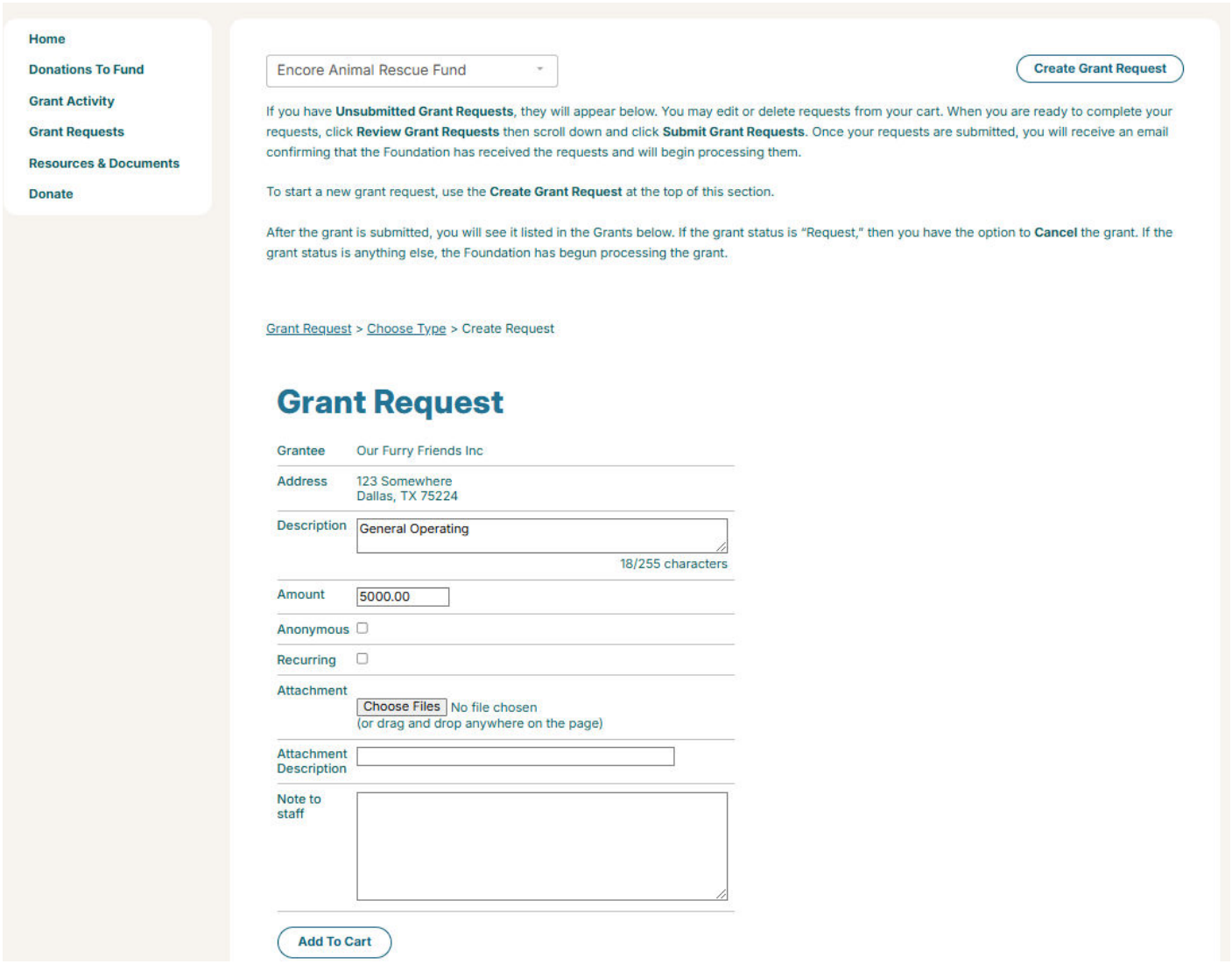
Once you have done so, you may choose the type of grant request you want to make:

- **Select a Previous Grantee** you've given to in the past by clicking in the box, and selecting from the drop-down menus.
- **Search for other Grantees** at the Foundation or in Candid by entering part of the organization name, city, state and/or EIN.
- **Enter Grantee information** manually. You will need the name, address and zip code of the grantee. Phone number, email and/or EIN are not required but encouraged to expedite the grant.



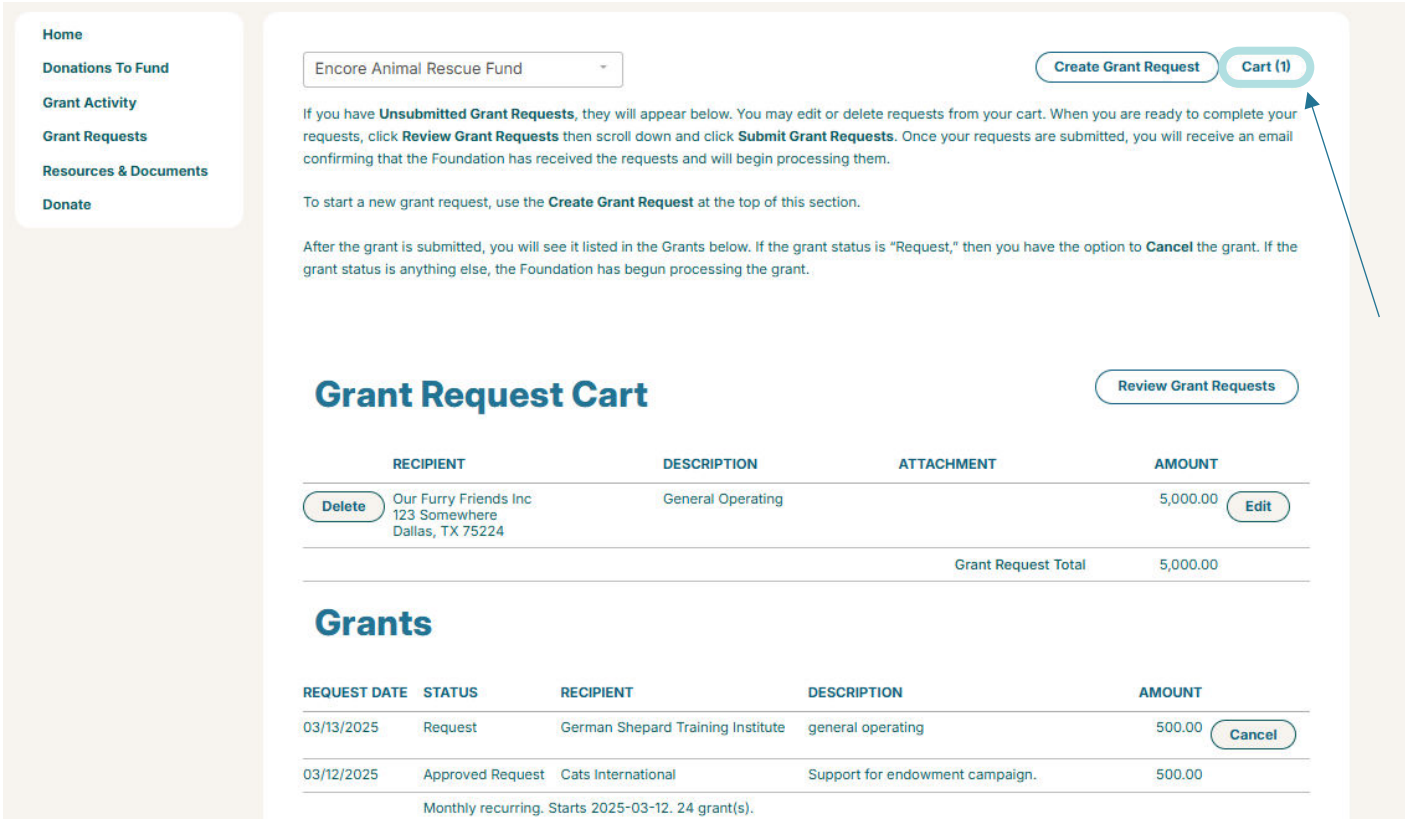
Once you select the grantee, the system will automatically move to a screen where you can:

- Add a **description** to let the grantee know how the grant is to be used. (For example, general operating or a specific campaign.)
- Include the **amount**.
- Indicate whether you want the grant to remain **anonymous**;
- Check whether you want to make this a **recurring** grant.
  If you choose to make a recurring grant, 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 The Dallas Foundation to stop the payments. If you do not want this to be a recurring grant, please skip this step.
- **Upload an attachment** (optional) such as when you are responding to a sponsorship request or campaign appeal, or if you have any other communications related to the grant. If you upload an attachment, please be sure to complete the attachment description field so that our staff has as much information as possible.
- Add any **additional notes or special instructions** you want our staff to see before processing your grant request.



Choose **Add to Cart**.

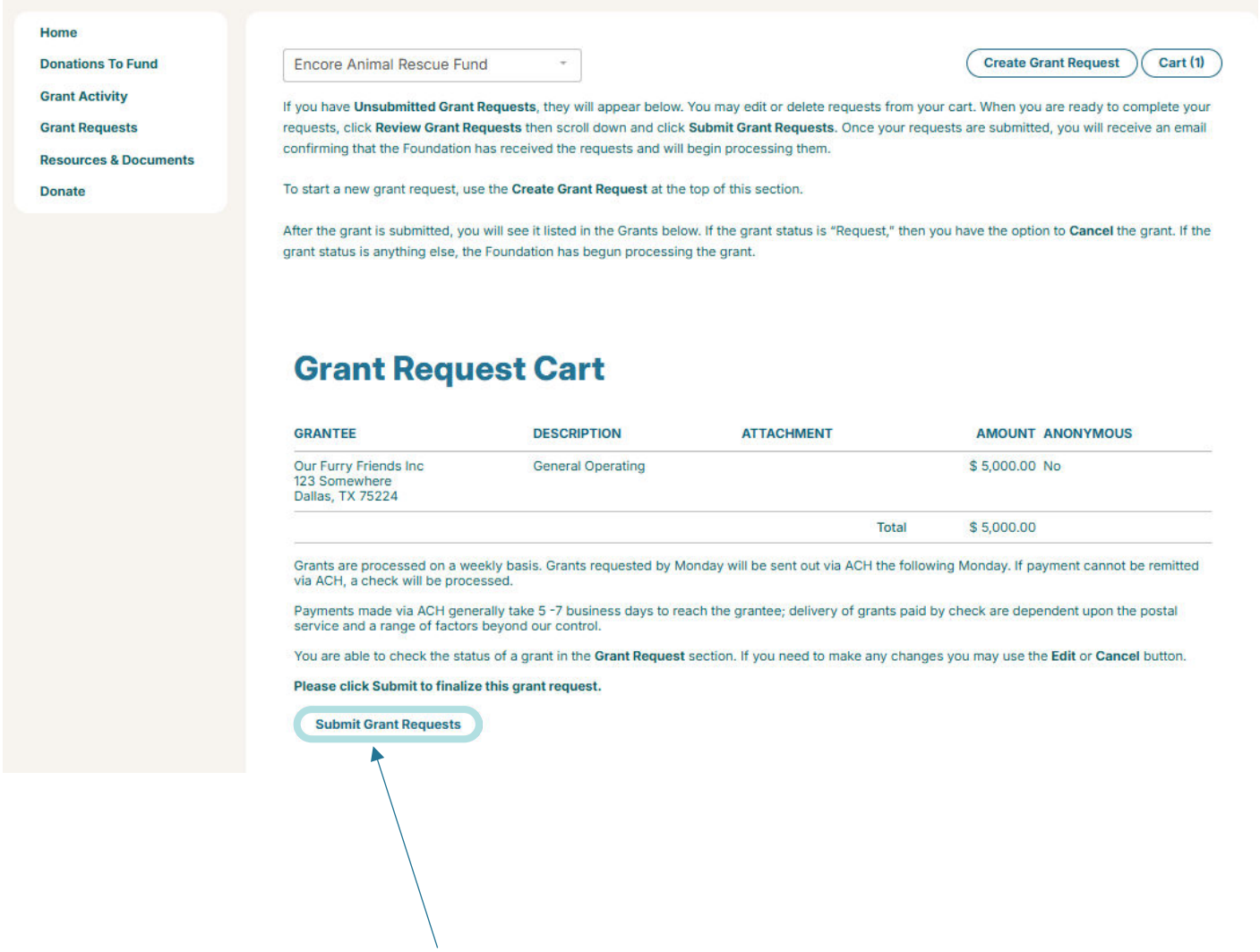
You should now see the **Cart** button in the upper right-hand corner. If you would like to make additional grants, you may again choose to **Create Grant Request** and follow the steps above. Once you have finished making your grant recommendations, click the **Cart** button to review your grant requests. **You MUST click Review Grant Requests and then scroll down and click Submit Grant Requests.**



Once you click **Submit Grant Requests**, then **Continue**, you will see a list of any grants requested to be paid along with their current status as well as all recent grants paid from the fund. Grant requests still in the request stage can be cancelled from this screen.

Don't forget to **Review** and **Submit** your grant requests in the cart! If you miss this step, we will send you a weekly reminder email until you either complete the submission process or remove the grant requests from your cart.

Once submitted, you will receive an email from **noreply@fcsuite.com** confirming that the grant request(s) has been received by the Foundation.



When will my grant be processed?

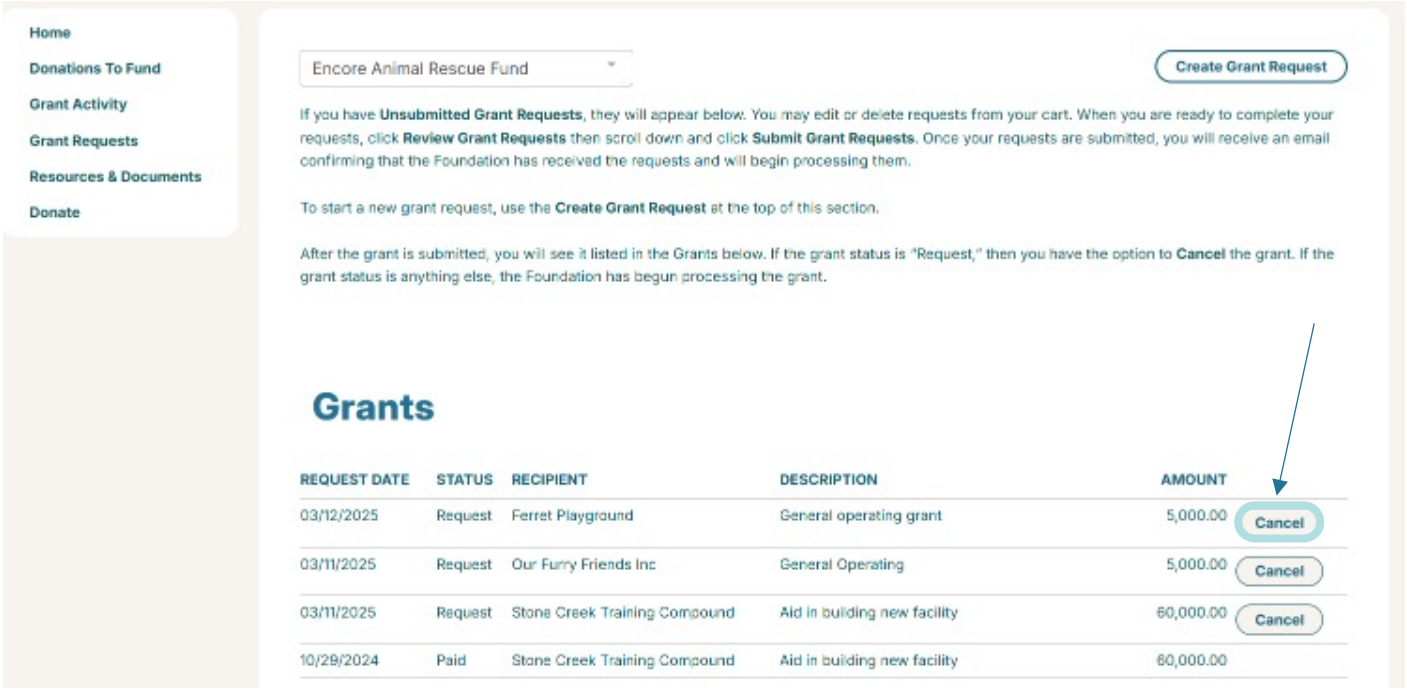
Grants are processed on a weekly basis. Grants requested by Monday will be sent out via ACH the following Monday. If payment cannot be remitted via ACH, a check will be processed.

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 only receive a confirmation email once you have submitted the grant(s) to the Foundation. You are always able to check the status of a grant via the portal by visiting the **Grant Requests** section of the portal.

How can I check the status of a grant?

The **Grant Requests** tab will show a list of grants *requested* to be paid along with their current status. Grant requests still in the *Request* stage can be cancelled from this screen by clicking the **Cancel** button.



Once a grant recommendation has been paid, the grant will appear in the **Grant Activity** section, which contains a **Grant Summary** tab listing all grants paid to each organization. The **Grant History** tab displays a listing of all individual grants recently made from the fund.

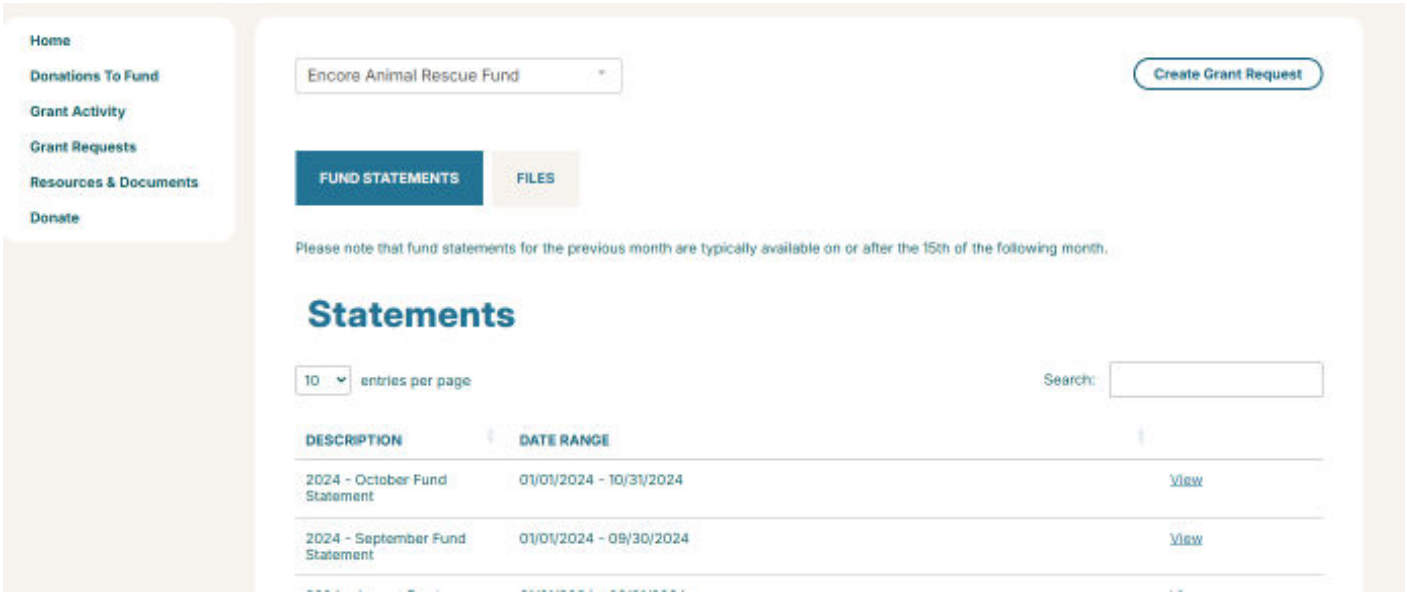
What if my grant history includes information that I don't understand or appears incorrect?

If you see anything in your grant history that is not accurate or needs further clarification, please contact **donorservices@dallasfoundation.org**. If you have specific questions about your past grantmaking or want to receive a summary report of grant activity to date, please send an email outlining your request.

Please note that interfund grants, or grants made from your fund to another fund held at The Dallas Foundation, made prior to May 2022 may appear as a grant to "Dallas Foundation Projects." We recommend initiating any new grants to other funds at The Dallas Foundation by choosing **Create Grant Request** and selecting **Previous Grantee**, then Foundation fund(s) you have given to in the past.

Where can I find my fund statement?

Fund statements are now located within the **Resources and Documents** section of the left-hand navigation menu. Fund Statements are listed in reverse chronological order. You may reorder the list by clicking on the column names. To view or print a fund statement, click on **View** to the right of the statement. The system will generate a pdf document in a new window of your web browser so that you may save the fund statement to your computer or print a copy for your records.



Can I download a list of my grantees or contributions?

You may sort grants or contributions simply by clicking the column on which you want to sort the information. Clicking once sorts oldest/smallest to newest/largest; clicking once again resorts the data from newest/largest to oldest/smallest.

- Click on **Export** to download all transactions from the Contributions or Grants tabs. Doing so will generate and download a .csv file.
- Click on **Filter** to narrow the list to before or after a certain date.

How do I find the current investment allocation for my fund?

Information about the investment pool(s) you have selected can now be found on your monthly fund statement.

My version of My TDF Login has tabs entitled Vendor Payables and Non-deductible Portion. What should I expect to see there?

Community Fund partners of The Dallas Foundation also have sight into other expenses paid from the fund; these will be listed under the Vendor Payables tab.

The Non-deductible Portion tab displays dollars received into the fund which are not tax deductible. While these funds are listed separately from total donations, they are reflected in your fund balance.

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

To ensure accuracy and prompt payment, we encourage fundholders to make grant recommendations via the MyTDF Login portal. However, we know that this service does not appeal to everyone.

To make an offline grant recommendation, email the following to your foundation contact:

- Name of fund
- Name of recipient organization
- Amount of grant recommendation
- Description/purpose of grant
- EIN (if known)

UPDATES, MAINTENANCE AND QUESTIONS

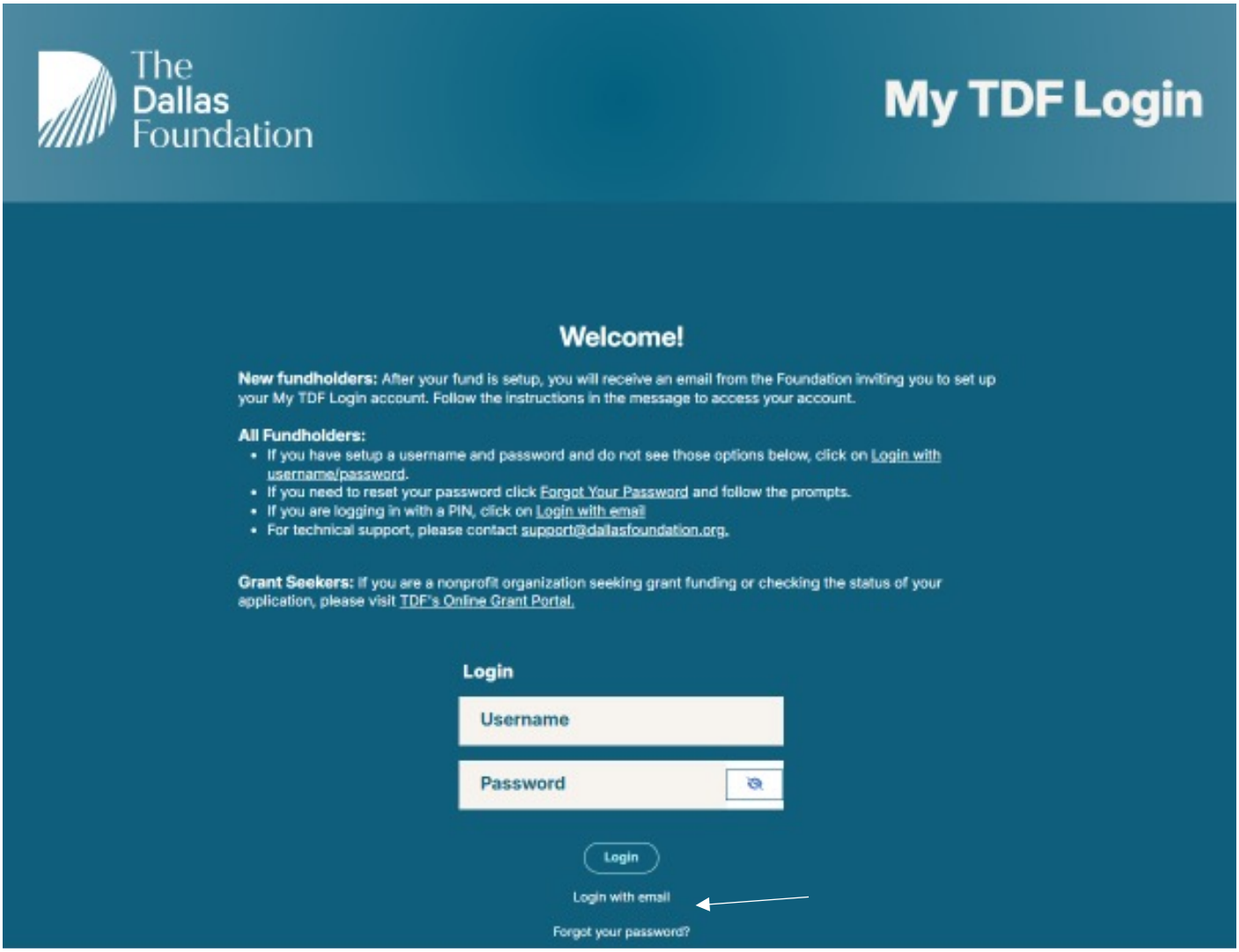
What if I forget my password?

On the login page, click **Forgot Password**. Enter the username of your account and click Reset Password.

If you have forgotten your username, select **Login with email**. When you enter an email address associated with a Fund Advisor in our system, you will be presented with the username and password screen with the username filled in that is associated with that email address. If you do not recall your password at this point, you may select **Forgot Password**.

When your password is changed, a system-generated email will be sent to the primary email address on the profile indicating that the change was made. Check your email for password assistance. *The email will come from The Dallas Foundation <noreply@fcsuite.com>. To avoid these emails going to your junk folder, please add this email address to your safe-senders list.*

For security reasons, Dallas Foundation staff will not be able to reset your password for you, but we can help you navigate the process if you need assistance.

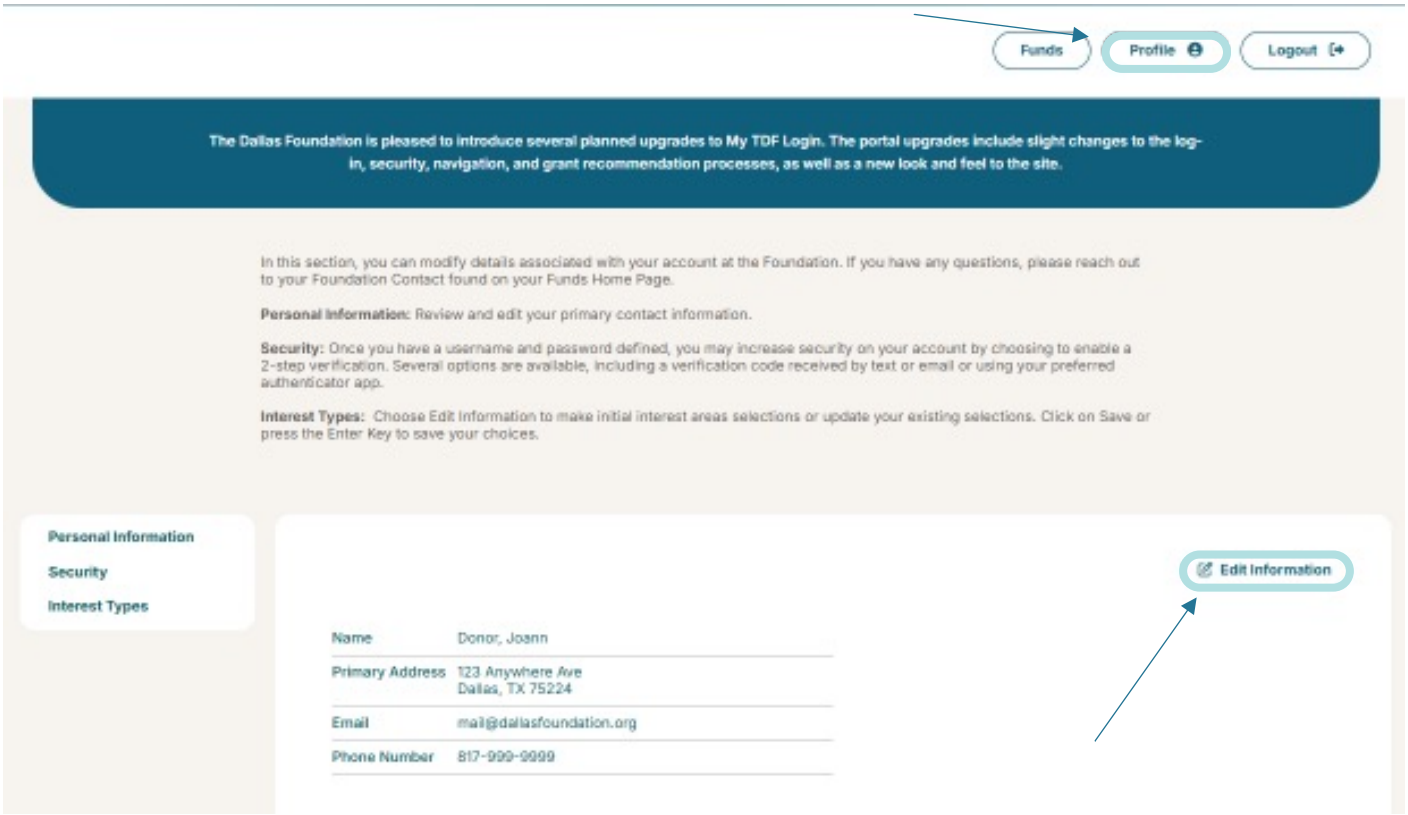


How do I manage my contact information?

Fund advisors may change their mailing address and phone number in the **Profile** section of My TDF Login. The **Profile** link is in the upper right-hand corner of the screen. Once you are in the **Profile** section, choose **Edit Information** to update your information. Be sure to click **Save** once you are finished.

Fund advisors cannot change their email address through My TDF Login. To change your email address, please reach out to your foundation contact. Similarly, if you need to add or remove advisors from the fund, please contact your foundation contact. Both requests must be received in writing.

Your foundation contact, along with their contact information, is listed on the **Home** page of My TDF Login.



Who do I contact if I have additional questions?

For other questions or assistance, please contact:

- Your foundation contact, which is listed on the **Home** page of My TDF Login along with their contact information.
- Donor Advised Fundholders, please contact **donorservices@dallasfoundation.org**.
- Community Fundholders, please email **communityimpact@dallasfoundation.org**.
- Or for general and technical assistance, **support@dallasfoundation.org**.

The Dallas Foundation®

Instagram
@dallasfoundation

Facebook
@dallasfoundation

LinkedIn
/the-dallas-foundation

Web
dallasfoundation.org

Phone
214.741.9898

Address
3000 Pegasus Park Dr., #930 Dallas, TX 75247