ONLINE GRANT RECOMMENDATION

RECOMMEND A GRANT

Click on the Donor Portal link from The Catholic Foundation Website

Login to the Web Portal using your portal email and password

Click on the RECOMMEND GRANT link from the menu on the left side of the screen

From this screen, you can submit a grant recommendation online using one of three methods:

1. From Grant History
   a) Check the box to the left of a grant recipient
   b) Click on the "Create a grant recommendation based on the selected grant" button at the bottom of the screen
   c) Complete the Grant Recommendation form that opens with the amount, designation, and acknowledgement information
   d) Click on the agree box of the legal statement
   e) Click on the "Submit" button at the bottom of the page
      i) Once submitted, you will receive an email confirmation

2. From Recipient List
   a) Use the "Search by Recipient" box at the top of the screen to narrow your search
      i) Enter a portion of the recipient name and click on the "Search" box or
      ii) Scroll through the pages to find a recipient
   b) Check the box to the left of a grant recipient
   c) Click on the "Create a grant recommendation based on the selected grant" button at the bottom of the screen
   d) Complete the Grant Recommendation form that opens with the amount, designation, and acknowledgement information
   e) Click on the agree box of the legal statement
   f) Click on the "Submit" box at the bottom of the page
      i) Once submitted, you will receive an email confirmation

3. Type in a new recipient
   a) Complete the requested information for the new grant
   b) Click on the agree box of the legal statement
   c) Click on the Submit Box at the bottom of the screen
      i) Once submitted, you will receive an email confirmation

RECOMMEND A TRANSFER

Click on the RECOMMEND TRANSFER link from the menu on the left side of the screen

From this screen, you can submit a recommendation for a grant from your Donor Advised Fund to another fund held by the Foundation. The Foundation manages assets for many Catholic ministries including Archdiocese of Denver Parishes and Schools.

1) Use the pull down list in the "Target Fund" box to select a Fund to issue a Grant Transfer
    a) Complete the amount and acknowledgement information for the new transfer
    b) Click on the agree box of the legal statement
    c) Click on the Submit Box at the bottom of the screen
        i) Once submitted, you will receive an email confirmation

TRACK THE PROGRESS OF YOUR GRANT RECOMMENDATIONS

Click on the RECOMMENDATIONS link from the menu on the left side of the screen

This screen allows you to review the status of grant recommendations made **online**.
    Note this screen will not show the status of grants which were submitted via regular mail, email, or phone. However, all grants regardless of the method of submission can be viewed in the GRANT HISTORY screen

Legend for Grant "Status":
    Submitted: Grant has been received by the Foundation and is in review
    Created: Grant has received approval and in check processing
    Processed: Grant has been approved and check has been issued