Requesting Funds

To request funds after logging in:

1) Go to the search bar labeled “Find” and type in the name of your endowment. When you click into the search bar a list of all your endowments should drop down. Select the endowment from which you would like to request a distribution.

2) After selecting the endowment, you will see the name of the endowment below the search bar. Below the endowment name you will “Spendable balance” this is the maximum distribution available from the endowment.

3) Click on the blue “Recommend a grant” button to the right of the name of the endowment. From there a pop-up menu will ask you to select the recipient (this should be your organization), the fund (this should be the endowment you just selected), and the grant amount (this should be, at a maximum, the “Spendable balance”).

4) An other path to this recommendation pop-up menu would be to click on “Recommendations” in the top ribbon.
5) The first pop-up menu that will appear after clicking “Recommend a grant” will be the “Charity” section where you will select a recipient. I recommend going to “Search for a recipient” and typing in your organization name in the “Select a charity” search bar. Churches named after saints will start with “St.” not “Saint”. For example, “St. Coleman”. If you cannot find your organization click the “Add a new charity” button and fill out the information requested. After finding or entering your organization, click “Next”.

![Charity section of the grant recommendation process]

- **Add a new charity**
- **Search for a recipient**
- **Next**
6) After hitting “Next” you will be taken to the “Recommendation” section. Make sure the “Funding Source” is the correct endowment you want to request a disbursement from. In the “Amount” section, please make sure you are entering the “Spendable balance” as a maximum request. You can request less than the “Spendable balance”. However, the minimum request is $50. Fill in the remaining boxes (Grant purpose, Special Instructions, etc.) and click “Next” at the bottom of the pop-up.
7) After clicking “Next” you will be taken to the “Agreement” section. Please click the radio button next to “I agree”. If you do not have any more endowment requests to complete, please click “Submit”. If you have multiple endowment requests you would like to make, please click “Save for later” (make sure to still click the radio button next to “I agree”).
8) If you clicked, “Submit” you will receive a confirmation email of the request and taken back to the home page. If you clicked “Save for later” you will be taken back to the home page where you can repeat the process detailed above for a different endowment fund. When you are ready to submit all your endowment requests. You will see “Unsubmitted recommendations” on your home page. Click the “Select all/none” radio button and then click “Submit”. This will submit all of your endowment requests together. You are able to submit endowment requests one at a time by simply clicking “Submit” in step number 7 above.