

DonorCentral Instructions for Annual Distribution

DonorCentral is a secure web portal that offers online access to fund information and allows temporary annual fund distribution requests through The Catholic Foundation website. To log in to your account, visit our website: <http://catholic-foundation.org/>

Accessing Your Account

Click on the “Login” link, located at the top, right-hand side of our website as circled in red.

157 East Broad Street, Columbus OH 43215 | 614.443.8893 • 1.866.298.8893 (toll free)



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Select the “Fund Login” option by clicking on the icon as circled in red.

LOGIN



BOARD OF TRUSTEES LOGIN



FUND LOGIN



GRANT APPLICATION LOGIN

Clicking on this icon will take you to the “DonorCentral Sign On” page pictured below:



DonorCentral Sign On

User ID:

Password:

[Forgot Your Password?](#)



To register for DonorCentral, [click here](#).

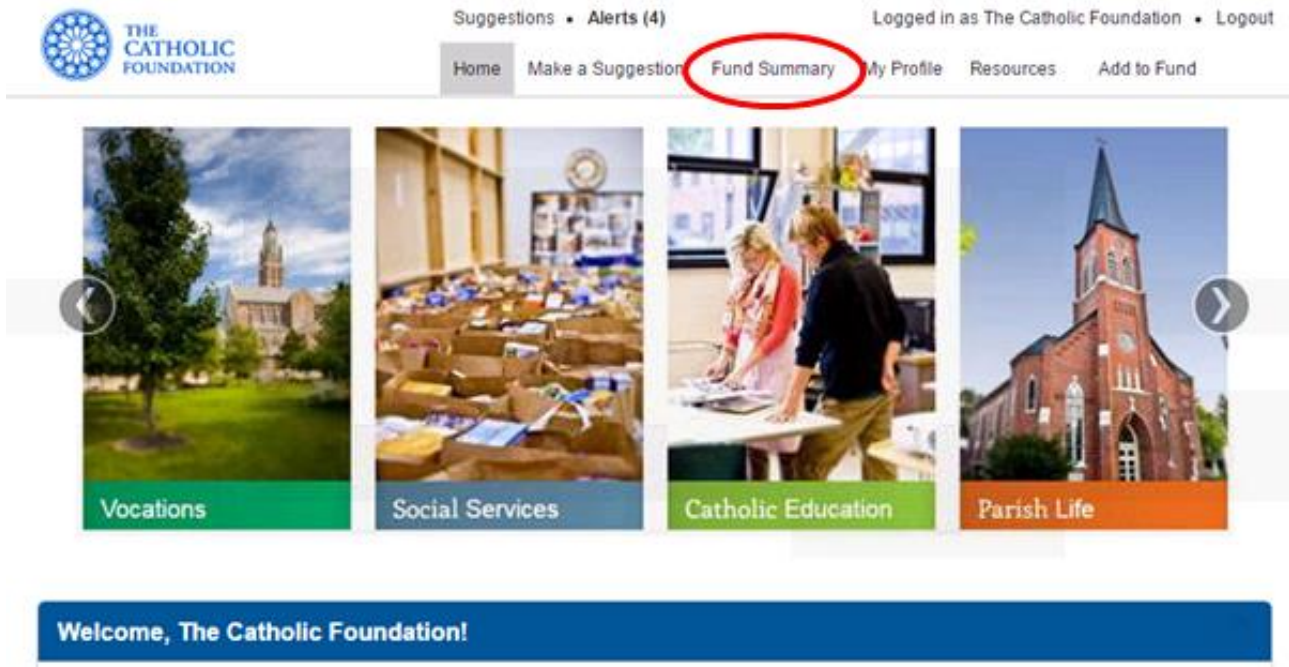
Protected by Comodo. [Important Security and Privacy Information](#).

Your use of DonorCentral signifies your acceptance of our [Terms and Conditions of Use](#).

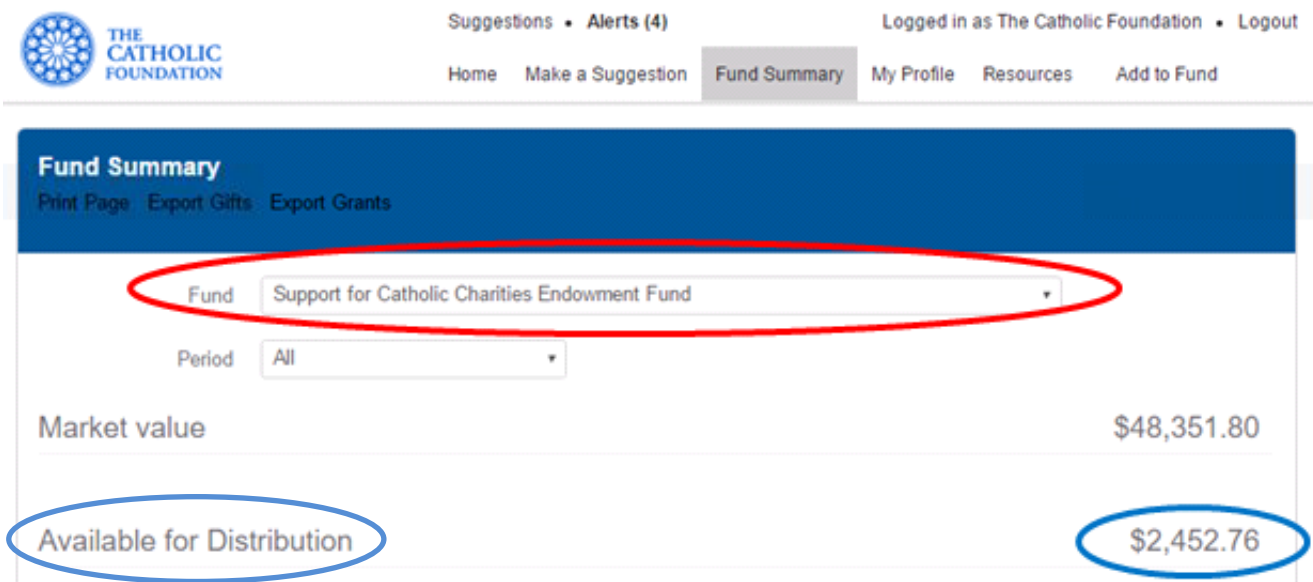
Enter the User ID and Password for the account and then click on the “Submit” button. Use the “Forgot Your Password” link if you are unable to recall your password. This will enable you to create a new password by entering the email address associated with your account. You will be sent an email to this address with information to reset your password. If you have trouble logging in, contact the office at 614-443-8893.

Viewing Available Distributions

Once you have successfully signed in to DonorCentral, your homepage will appear. Click on the “Fund Summary” link located near the top of the page and circled in **red** as pictured.



Clicking on this link will open a page that displays detailed information about your fund(s). To view information about your fund(s), use the drop down menu circled in **red** in the picture below by clicking on the arrow to reveal your list of funds. The amount available for this year’s distribution will be displayed as “Available for Distribution” as circled in **blue**.



Request a Distribution

The “Make a Suggestion” page allows you to request a distribution from each Endowment Fund. Clicking on the link will open the “Research Charities” page as shown.

The screenshot shows the 'Research Charities' search interface. At the top, it says 'Look up nonprofits by any of the options below to review potential matches.' Below this are several input fields: 'Name' with a dropdown set to 'contains' and an empty text box; 'City', 'State/Province' (dropdown set to '- Select -'), and 'Zip/Postal' (empty text box); and 'Tax ID (optional)' (empty text box). There is a checkbox for 'Only search in prior recommendations'. At the bottom are three buttons: 'Search' (highlighted in blue), 'Clear', and 'New Grant' (highlighted in green).

This page allows you to search by name the Organization(s) to receive the check. Simply enter a **single unique word** in the blank field next to “Name Contains” and click on the “Search” button, shown circled in **red**. The search results will appear directly below the “Search” button. You have the option to “View Detail” to verify that it is the Organization you were searching for, or you may choose the “Make a Grant” option if the correct Organization is displayed.

These buttons are located in the “Actions” column circled in **blue**. If you are unable to find an Organization, you can click on the “New Grant” button circled in **green** in the picture below.

PLEASE NOTE: Many organizations have the same name. We urge you to verify the address of the Organization you have selected before clicking on “Make a Grant”. If you have trouble finding your Organization, simplify your search by using only one word. A simple difference in typing Saint or St. can be considered a different name.

This screenshot shows the search form with 'Catholic Foundation' entered in the 'Name' field. A red arrow points to the text box. Below the form are three buttons: 'Search' (circled in red), 'Clear', and 'New Grant' (circled in green). Below the buttons is a table with search results. The table has three columns: 'Organization Name', 'Location', and 'Actions'. The first row shows 'The Catholic Foundation' with location 'Columbus, OH, 257 East Broad Street'. The 'Actions' column for this row contains two buttons: 'Make a Grant' and 'View Detail', which are circled in blue.

Organization Name	Location	Actions
The Catholic Foundation	Columbus, OH, 257 East Broad Street	Make a Grant View Detail

Both “Make a Grant” and “New Grant” lead to a “Suggestion Form”. Choosing the “Make a Grant” option will provide a pre-populated suggestion form with the Organization’s contact information on file. You also have the option to edit or add to the information displayed. The “New Grant” option provides a blank suggestion form for you to provide the Organization’s contact information.

Suggestion Form

Advisor(s) *	<input type="text"/>				
Fund *	<input type="text"/>				
Amount *	<input type="text"/>				
Organization Name *	<input type="text"/>				
Address 1	<input type="text"/>				
Address 2	<input type="text"/>				
City	<input type="text"/>	State	<input type="text" value="Ohio"/>	Zip	<input type="text"/>
Grant Purpose	<input type="text"/>				
Special Instructions	<input type="text"/>				
Anonymous?	<input type="text" value="No"/>				
E-mail Confirmation	<input type="text"/>				

*** Indicates that the field is required and must be filled in before final submission.**

Glossary of Terms

Advisor – name of the person requesting the distribution. Please list the person The Catholic Foundation should contact with any questions or concerns regarding the request.

Fund – name of the Fund from which you would like the distribution grant to be made.

Amount – the dollar amount of the suggested grant distribution.

Organization Name – name of the Organization receiving the check.

Address 1, Address 2, City, State, Zip – contact information for mailing to the Organization.

Grant Purpose – how the money will be used (General Needs, Tuition Assistance, etc.).

Special Instructions – additional information, special requests, special mailing instructions, etc..

E-mail Confirmation – receipt for anyone in the Organization who would like an email confirmation that it was successfully submitted. You may insert as many emails as you like.

Submitting the Request

Once finished with the information for the grant suggestion, scroll to the bottom of the page to the “Certification” section.

Certification

DONOR ADVISED FUNDS

*I acknowledge that the above suggestions are not binding on The Foundation of the Catholic Diocese of Columbus (the “Foundation”) and that the Foundation has sole discretion regarding distributions from said donor advised fund. I further acknowledge that if the Foundation decides to make any distribution(s) that I have suggested above, I will not expect any personal benefit from such distribution(s) and such distribution(s)

- (i) will not represent the payment of dues for membership of an individual in an organization,
- (ii) will not be used to purchase admission to charitable events,
- (iii) will not discharge or satisfy a legally enforceable obligation or personal pledge that has been made by me or any other individual or entity, and
- (iv) will not be used to pay tuition for any specific student to any school.

ENDOWMENT FUNDS

By completing this form I confirm that the beneficiary organization is in existence, that I am the authorized fund representative and that I will adhere to utilizing any distribution from this fund in accordance with the wishes of the donor per the agreement language.

I agree I do not agree

Read the Endowment Certification section and choose “I agree” or “I do not agree” and click on the “Save” button at the bottom of the page. If you select “I do not agree” an error message will occur. If you select “I agree,” the suggestion will be saved and the “Pending Suggestions” page will appear.

Pending Suggestions **\$100.00**

To submit your suggestions, if any are present, check one or more of the boxes on the left and click the **Submit List** button only once. When submitting a large number of suggestions, this may take a few minutes. You will receive a confirmation prompt once the submission process has completed.

<input type="checkbox"/>	Organization Name	Amount	Actions
<input type="checkbox"/>	The Catholic Foundation	\$100.00	Edit ✕

To request an additional distribution, click the “Continue” button shown circled in **red**. To submit the distribution request, check the box next to each Organization Name and then click on the “Submit List” button shown circled in **blue**. Once successfully submitted, a confirmation page will appear.

Suggestion Confirmation
Print Page

Suggestion #1297924

Fund	Bridge the Gap Donor Advised Fund (325EF)
Donor(s)	The Catholic Foundation
Amount	\$100
Organization Name	The Catholic Foundation
Address 1	257 East Broad Street
Address 2	
City	Columbus
State	OH
Zip	43215
Grant Purpose	
Special Instructions	
Anonymous?	NO
Your e-mail for confirmation	

Logout

For security purposes, be sure to Logout of your account by clicking on the “Logout” link shown circled in **red**.



[Site Configuration](#) • [Suggestions](#)

Logged in as Danielle Wetzel • [Logout](#)

[Home](#) [Recommend A Grant](#) [Fund Summary](#) [My Profile](#) [Resources](#)

Thank you for using DonorCentral!

All Annual Distribution checks will be processed as they are received.
Please contact us with any questions or concerns.

614-443-8893 or 886-298-8893