

Welcome to the OCCF Donor Portal!

Get to know your online fund management tool.

The donor portal is your secure online platform for managing your charitable fund at the Orange County Community Foundation [OCCF].

[Click to visit the donor portal](#)

Depending on your fund type and level of access, you can use the portal to:

- View your fund's activity
- View fund balances, grant and contribution history
- View and print fund statements
- Make grant requests (*as applicable*)
- Update your contact details, including address and phone number

As always, our team stands ready to answer any questions you might have. If you'd like assistance with the portal, [please contact us](#).

Getting Started

1. Go to the [Portal Login page](#)
2. Click "Register for a new account"



Portal Login

Hello, and welcome! Please sign in to continue.

*Email

*Password

Remember Me

[Forgot Password ?](#)

Sign In

Don't have an account? [Register for a new account](#).

Need of Help? Here are some resources.



[FAQ on Registering](#) [Scholarship Applicant Instructions](#)

3. Enter the required fields marked with an asterisk [name, address, email, phone number, etc.] by clicking through via the “Next” button.



Register for New Account

Please fill your detail to access your account.

Title	Gender
Select Title 	Select Gender 
*First Name	
<input type="text"/>	
*Last Name	
<input type="text"/>	
<input type="button" value="Back"/>	<input type="button" value="Next"/>

4. After you register, a confirmation page displays that OCCF has received your new user registration request. Your request will be reviewed for approval by an OCCF team member.



Thank you for submitting a new user registration request. Your request is being reviewed by OCCF staff and you will receive a confirmation shortly. For any questions, please contact help@oc-cf.org.

You will also receive an automated email confirmation.

If you do not receive the automated email, please [contact our team](#).

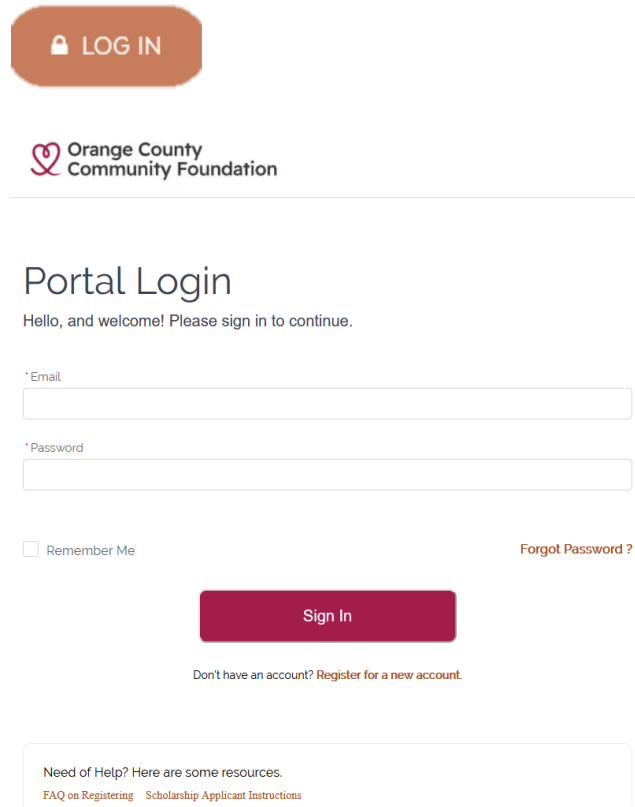
5. Once your registration has been approved, you will receive an automated email from sender help@oc-cf.org with “Welcome to Donor Portal” referenced in the subject line. The automated email will instruct you on the simple steps to activate your account and log in for the first time, including creating a password.

Username: Your username is your email address (the email address associated with your fund).

Password: Your password must be at least eight characters long and include a mix of lowercase letters, uppercase letters, special characters, and numbers.

Logging In

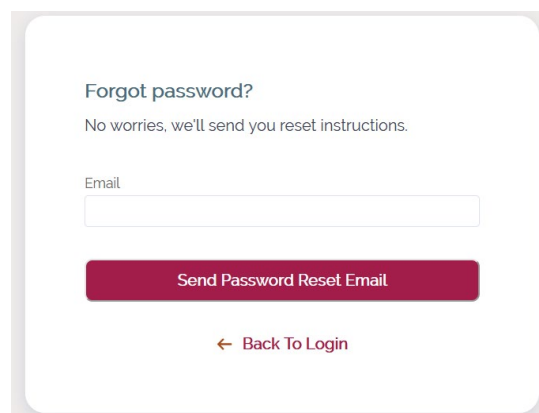
To access the portal at any time, simply visit www.oc-cf.org from any browser and click on the “LOG IN” button in the upper right corner. This will take you to the login screen where you will enter your username (the email address associated with your fund) and password.



The screenshot shows the Portal Login page. At the top left is the Orange County Community Foundation logo. Below it is a large orange button with a lock icon and the text "LOG IN". Underneath is the Orange County Community Foundation logo again. The main heading is "Portal Login" followed by the text "Hello, and welcome! Please sign in to continue." There are two input fields: one for email (labeled "*Email") and one for password (labeled "*Password"). Below the email field is a checkbox labeled "Remember Me" and a link labeled "Forgot Password?". A large maroon button labeled "Sign In" is centered below the input fields. Below the "Sign In" button is the text "Don't have an account? [Register for a new account.](#)" At the bottom, there is a box titled "Need of Help? Here are some resources." with two links: "FAQ on Registering" and "Scholarship Applicant Instructions".

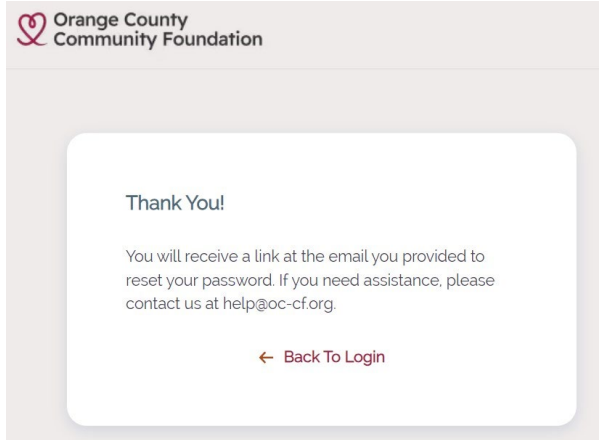
LOCKED OUT?

If you ever have trouble remembering your password, click “Forgot Password?” on the login page. Enter your email username and click the “Send Password Reset Email button”.



The screenshot shows the "Forgot password?" page. The heading is "Forgot password?" followed by the text "No worries, we'll send you reset instructions." There is an input field for "Email". Below the input field is a large maroon button labeled "Send Password Reset Email". At the bottom, there is a link labeled "← Back To Login".

If an account with the provided email is found, instructions to reset your password will be sent to that address. If you're still having trouble, please contact our [team](#).



----- Forwarded Message -----

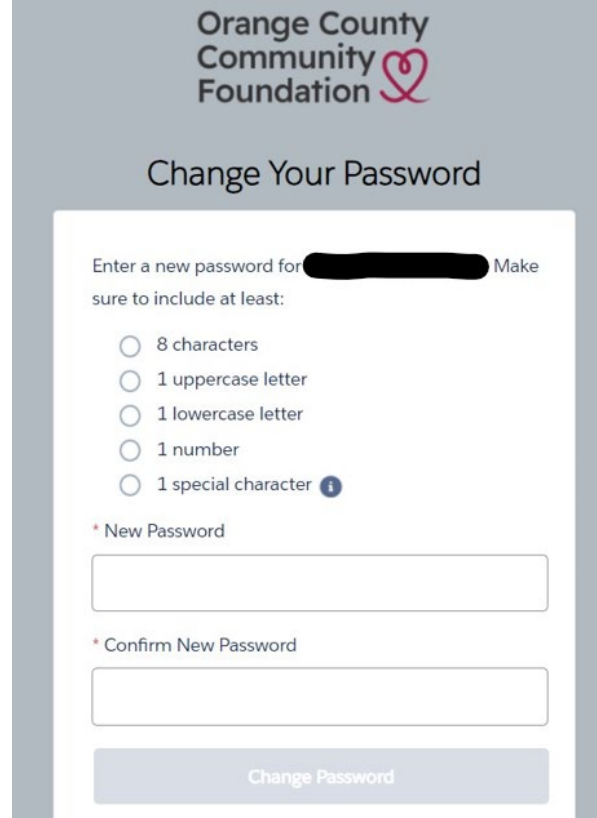
From: OCCF DonorPortal <help@oc-cf.org>
To: [REDACTED]
Sent: Thursday, August 24, 2023 at 12:27:10 PM PDT
Subject: Your new Donor Portal password

Hi Cathleen,

Your password has been reset for Donor Portal. Go to:

https://oc-cf.my.site.com/DonorPortal/login?c=t3qjii44fAASdsiuB_vr7w7SpY0UpayqIWE3NJW7coys.aa5dbnFBZpFg4f

Thanks,
Orange County Community Foundation



Orange County
Community
Foundation

Change Your Password

Enter a new password for [REDACTED] Make sure to include at least:

- 8 characters
- 1 uppercase letter
- 1 lowercase letter
- 1 number
- 1 special character ⓘ

* New Password

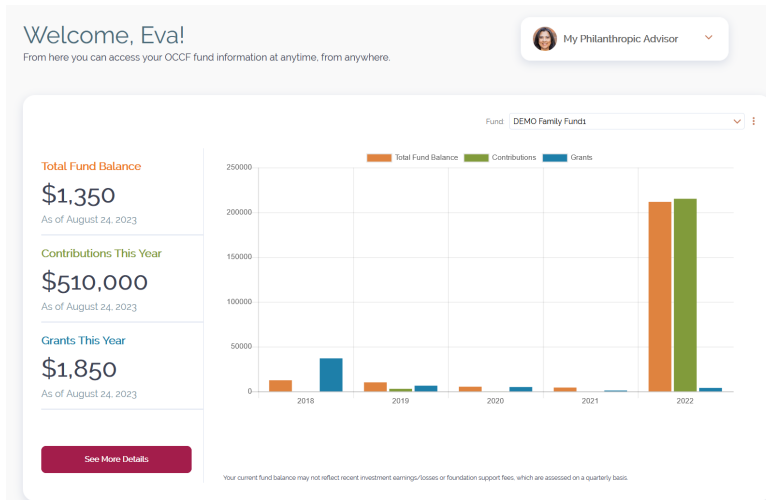
* Confirm New Password

Change Password

Navigating the Portal

Use the menu bar along the top of the window to manage your fund(s).

Fund Dashboard: Provides an at-a-glance list of your Current Fund Balance, YTD Contributions and Grants as well as a chart highlighting your fund history.



- Select and interact with your fund(s).
- Click on “See More Details” to:
 - **Grant History:** Offers details about all grants distributed from the selected fund. See an itemized list of grants paid in descending date order and view the status of new grants as they move through our approval process.
 - Grant History table shows 10 most recent grants.
 - Sort by Date, Organization, Amount, and Status by clicking on the column’s header (default setting is sorted by Date).

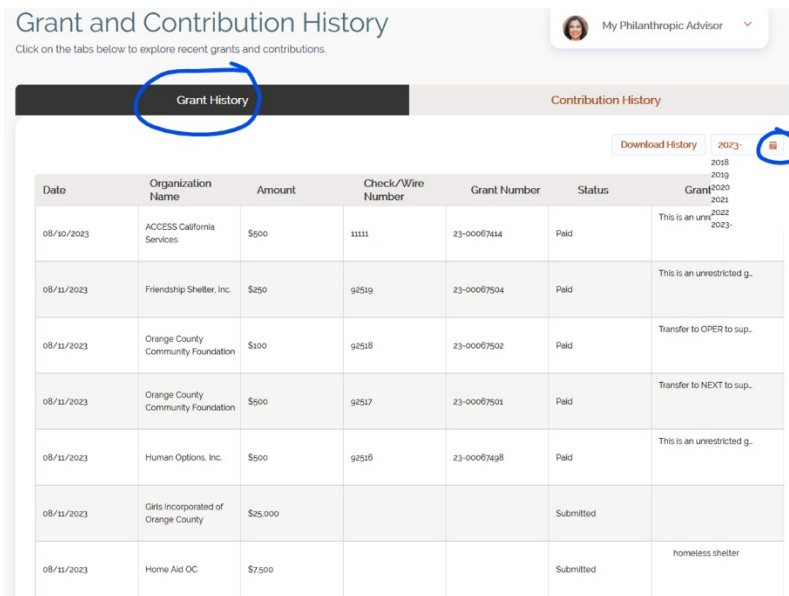
Grant History

Contribution History

Date	Organization	Amount	Status
09/06/2023	KidWorks C.	\$10,000	Scheduled
08/16/2023	Helping Oth.	\$400	Scheduled
08/16/2023	St. MargareL	\$5,000	Scheduled
08/16/2023	Laguna Can.	\$1,000	Scheduled
08/16/2023	Families For.	\$500	Scheduled
08/11/2023	Friendship ..	\$250	Paid
08/11/2023	Orange Cou.	\$100	Paid
08/11/2023	Orange Cou.	\$500	Paid
08/11/2023	Human Opti.	\$500	Paid
08/10/2023	ACCESS Cal.	\$500	Paid

View All

- Click “View All” to see the Large Grant History table which shows the Calendar Year’s recent grants. If you wish to see a different Year, go to the far right of the navigation menu to select a Calendar Year (five most recent years are listed).
 - Scroll to bottom of page and click “Next” to see more grants from the year you selected.
 - Sort by Date, Organization, Amount, Check/Wire Number, Grant Number, Status, and Grant Purpose by clicking on the column’s header (default setting is sorting by Date).
 - You may use the “Download History” option (which appears on the far right of the navigation menu) to export grant information by the year you selected into a Microsoft Excel spreadsheet.



Grant and Contribution History

Click on the tabs below to explore recent grants and contributions.

My Philanthropic Advisor

Grant History Contribution History

Download History 2023-

Date	Organization Name	Amount	Check/Wire Number	Grant Number	Status	Grant
08/10/2023	ACCESS California Services	\$500	11111	23-00067414	Paid	This is an unres...
08/11/2023	Friendship Shelter, Inc.	\$250	92519	23-00067504	Paid	This is an unrestricted g...
08/11/2023	Orange County Community Foundation	\$100	92518	23-00067502	Paid	Transfer to OPER to sup...
08/11/2023	Orange County Community Foundation	\$500	92517	23-00067501	Paid	Transfer to NEXT to sup...
08/11/2023	Human Options, Inc.	\$500	92515	23-00067498	Paid	This is an unrestricted g...
08/11/2023	Girls Incorporated of Orange County	\$25,000			Submitted	
08/11/2023	Home Aid OC	\$7,500			Submitted	homeless shelter

- **Contribution History:** Provides in-depth information regarding each contribution received into the fund. See an itemized list of contributions received in descending date order.
 - The Contribution History table shows 10 most recent contributions.
 - a. Sort by Date, Type, Amount, and Description by clicking on the column’s header (default setting is sorted by Date).

Grant History **Contribution History**

Date	Type	Amount	Description
8/7/2023	Check	\$20,000	City Nation..
8/7/2023	Check	\$350,000	Cox Comm..
8/7/2023	Check	\$30,000	Citizens Bus..
8/7/2023	Credit Card	\$75,000	Bank of Am..
8/7/2023	Check	\$10,000	Hope Cente..
8/7/2023	Check	\$25,000	Tarsadia Fo..

[View All](#)

- Click “View All” to see the Large Contribution History table which shows the Calendar Year’s recent grants. If you wish to see a different Year, go to the far right of the navigation menu to select a Calendar Year (five most recent years are listed).
 - a. Scroll to bottom of page and click “Next” to see more contributions for the year you selected.
 - b. Sort by Date, Type, Amount, and Description by clicking on the column’s header (default setting is sorting by Date).
 - c. You may use the “Download History” option (which appears on the far right of the navigation menu) to export grant information by the year you selected into a Microsoft Excel spreadsheet.

Grant and Contribution History My Philanthropic Advisor

Click on the tabs below to explore recent grants and contributions.

Grant History **Contribution History**

Download History 2023 2018 2019 2020 2021 2022 2023

Date	Transaction Type	Amount	Description
8/7/2023	Check	\$20,000	City National Bank
8/7/2023	Check	\$350,000	Cox Communications
8/7/2023	Check	\$30,000	Citizens Business Bank
8/7/2023	Credit Card	\$75,000	Bank of America
8/7/2023	Check	\$10,000	Hope Center for the Arts
8/7/2023	Check	\$25,000	Tarsadia Foundation

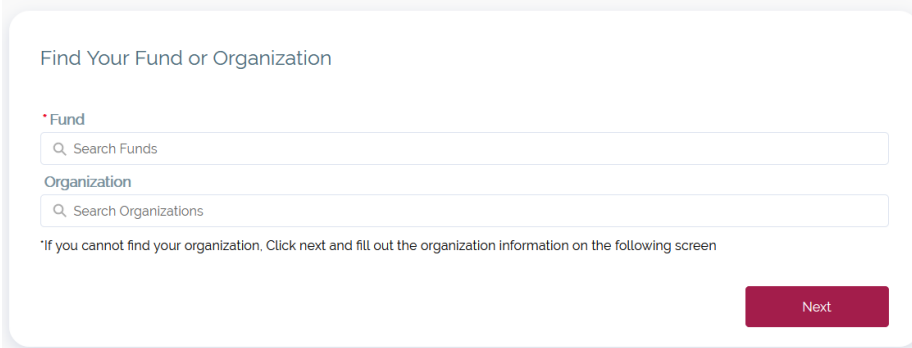
Make a Grant: Use this tab to request a grant from your fund.

The portal makes it easy for fundholders with Donor-Advised Funds to recommend grants. After you submit a grant request, our team performs due diligence and processes your grant. Once your grant has been processed, you will receive an email notification from one of our Grants Administrators.

1. To request a grant from your fund, click the “Make a Grant” tab on the navigation menu.

Make a Grant

If you are considering granting out your fund balance, please contact your philanthropic advisor. This balance may not reflect adjustments for current income and fees. Grant requests made by noon Pacific Time on Tuesdays will be mailed that Friday.



Search Funds: Click in the “Search Funds” field to find one of your funds. If you have more than one fund, they will display in alphabetical order. Choose the fund you wish to use to make a grant.

Search Organizations: This box queries the complete list of nonprofit organizations holding current 501(c)(3) tax-exempt status with the Internal Revenue Service.

- The last seven [7] organizations that your fund has granted to will populate when you click the “Search Organizations” field.
- If you do not see the Organization you are looking for, you may start to type in the name of it and the database will populate if OCCF has granted to it in the past.
- If the Organization does not populate, click “Next” which allows you to manually enter the information we need to process your grant recommendation.

2. Click the “Next” button.
3. A new page displays continuing the form with Recipient Agency Information and all the required fields for the Recipient Agency and Recipient Agency Contact prepopulate with information from the Organization selected in Step 1.
 - a. The fields marked with a red asterisk are required; providing all of the requested information allows us to ensure your grant recommendation is processed as accurately and efficiently as possible.

Recipient Agency Information

* Recipient Agency <input type="text"/>	Recipient Agency Contact <input type="text"/>
Recipient Agency Street <input type="text"/>	Recipient Contact title <input type="text"/>
* Recipient Agency City <input type="text"/>	Recipient Contact Phone Number (Optional) <input type="text"/>
* Recipient Agency State <input type="text"/>	Recipient Contact Email (Optional) <input type="text"/>
Recipient Agency Zip Code <input type="text"/>	Tax EIN <input type="text"/>

- Continue down the page to the Grant Recommendation Information and complete the form fields as follows:

Grant Recommendation Information

*Amount <input type="text"/>	Purpose of Grant <input type="text"/>
Acknowledgement Name <input type="text"/>	Special Instructions Add description <input type="text"/>
Submit Grant Anonymously No <input type="button" value="v"/>	

The IRS prohibits the use of DAF for the payment of any membership, tickets, goods or any similar contributions that provide a benefit to the donor, family members, business associates, or employees.

I certify that I will not receive, nor will any related party receive any benefit, directly or indirectly, from the charitable distribution or organization recommended to receive the grant. Further, I understand that the final judgment on recipients and awards rest with the Board of Governors of the Orange Country Community Foundation.

- Acknowledgment Name: Enter how you would like to be publicly recognized.
 - Examples: Your fund's name, your name(s), Anonymous, In Memory/Honor of, etc.
 - Amount (minimum \$250)
 - Purpose of Grant
 - Submit Grant Anonymously if you do not want to be publicly recognized.
 - Special Instructions for any notes you would like the OCCF team to have.
- Click "Submit" button. Clicking the "Submit" button launches a submission confirmation page.

- The confirmation page displays the following details from the Grant Request: Fund Title, Grant Organization, Purpose of Grant, Grant Amount, Date Requested.
- A final email from our Grants Administrators will confirm the grant request-organization, amount, purpose (if any), and mail date.
- If you would like to request another grant click on Make Another Grant Request. If not, click Done and you will be redirected to the Fund Overview page for the fund from which the grant was just requested.

Make a Contribution: View instructions for contributing assets to your fund.

Documents & Reports: View and print statements related to your fund.

1. Click in the "Select Fund" field to choose your fund. If you have more than one fund, they will display when you click the arrow.
2. Choose Start Month and Start Year.
3. Choose End Month and End Year.
4. Click "Generate Report."
5. To print and/or save report, click "Print this Page."

Print this Page

- To print report, choose your printer, then click "Print."
- To save report, choose "Save to PDF," then click "Save."

Print

2 sheets of paper

Destination



My Profile: Click on your name in the top-right corner and choose "Edit Profile" to edit your contact information and email preferences.

Signing Out

Click on your name in the top-right corner and choose "Logout".

Frequently Asked Questions

How do I log in to the new portal for the first time?

To log in to the new portal, you will need to re-register your account. Please see the "Getting Started" section at the beginning of this document.

Can I donate to my fund online?

Absolutely! We offer several secure methods of giving to your fund, including online donations via credit card. [Click here to see a menu of options for giving.](#)

Can I change the Fund Advisors authorized to access the portal?

We understand that Fund Advisors and individuals with Fund Access may occasionally need to be changed on your account, and the donor portal makes it easy to verify which individuals are currently authorized for each charitable fund. To view, click on "See More Details" from your "Fund Dashboard" page. If changes are needed, please have a Founder contact your Philanthropic Advisor whose information is available on the portal.

On the Grants Request page, I see where I choose the grantee. Where do I enter the amount of the grant and the purpose?

Once you have selected the organization you want to make a grant to and click "Next" a new page displays continuing the form where you can enter additional information, including the grant amount and purpose. Please enter any grant purpose in the "Purpose of Grant" field; if left blank, the grant will be unrestricted.

How do I make a grant to support an OCCF initiative?

Fundholders with Donor Advised Funds can support an OCCF initiative. Explore our collaborative funding opportunities and field of interest funds [here](#). To make a grant to one of our initiatives visit the "Make a Grant" page through the portal then make a grant request to OCCF noting in the Grant Purpose the initiative that you want to support.

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

If you correctly added a grant request, you will receive confirmation that it went to our grants team to process. You can also double check by going to the grants history table (on "See More Details" from your "Fund Dashboard" page) and you will see the new grant added at the top of the table. It will be in the Submitted status. If you do not see the grant, please request it again.

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

No worries, simply [email](mailto:help@oc-cf.org) us at help@oc-cf.org or call us at (949) 553-4202 to assist you.

What if I have additional questions?

If you have a question that is not answered here or in the system instructions, please [contact our Donor & Community Engagement team](#).