



THE COMMUNITY  
FOUNDATION

— FOR NORTHEAST FLORIDA —

*Giving Back. Forever Forward.*

# TCF Grantee Portal End-User Manual

October 2025

<https://tcfnefl.my.site.com/fundingprograms>

[info@jaxcf.org](mailto:info@jaxcf.org)

904.356.4483

# Contents

- Accessing the Grantee Portal .....3
  - Invited by Welcome Email.....3
  - New User Registration .....3
  - Forgot Password .....4
  - Logging In.....4
- Navigation .....4
  - Home Page .....5
- Applications (Funding Programs) .....5
  - Apply to a Funding Program .....5
- Funding Requests (Grant Requests).....7
  - Funding Request Detail.....8
  - Grant Applications .....9
- Requirements .....9
  - Fill out Requirement Form .....10
- Disbursements .....10
- Organization .....11
  - Managing Organization .....11
  - Managing Organization Users.....11
  - Contact TCF Staff .....12
- Profile & Settings.....13

# Accessing the Grantee Portal

The Grantee Portal can be found at: <https://tcfnefl.my.site.com/fundingprograms>

A new user can either click a link from the welcome email sent by TCF Staff or self-register via the website.

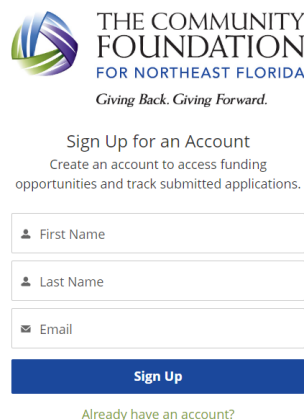
## Invited by Welcome Email

If you receive a welcome email from TCF Grantee Portal, click the link to finish setting up your account. The link will jump you directly to step 5 in the New User Registration.

## New User Registration

If a username/password does not already exist, the user should create an account by:

1. From the login page, click “Create Account” link.
2. Fill in the Sign Up for an Account form.
3. Click Sign Up



The screenshot shows the 'Sign Up for an Account' form. At the top is the logo for 'THE COMMUNITY FOUNDATION FOR NORTHEAST FLORIDA' with the tagline 'Giving Back. Giving Forward.' Below the logo, the text reads 'Sign Up for an Account' and 'Create an account to access funding opportunities and track submitted applications.' The form consists of three input fields: 'First Name', 'Last Name', and 'Email', each with a small icon to its left. Below these fields is a blue 'Sign Up' button. At the bottom of the form, there is a link that says 'Already have an account?'.

Figure 1: Sign-up Form

4. You will receive an email with a link to finish setting up your account.
5. Click the link and it will ask for additional information profile information about you:
  - a. User Type
    - i. Organization
      1. Relationship to Organization
      2. Tax ID
    - ii. Artist
      1. Phone
      2. Address
      3. Birthdate
    - iii. Student
6. If the Tax ID is found in our system, a confirmation window will appear to confirm the correct Organization.

7. If the Tax ID is not found in our system, you will be asked for additional information about the organization, including address and phone number.
8. Finally, set your account password.

## Forgot Password

If a user needs a password reset, the user can use the “Forgot your password?” link from the login page. Once on the Password Reset page:

1. The end-user will enter their username
  - a. The username should be their organization email address
  - b. However, due to Salesforce restrictions, if they have another Salesforce account with that email address, their username will have “+tcf” appended to it.
    - i. For example, [john@sample.com](mailto:john@sample.com) might be [john@sample.com+tcf](mailto:john@sample.com+tcf)
2. Click Reset Password
3. Follow the instructions in their email to finish resetting their password.

The end-user can reach out to TCF Staff for a manual password reset at anytime.

## Logging In

An end-user can login by entering their Username (Organization Email Address) and Password.

For trouble logging in, see Forgot Password or reach out to TCF.

## Navigation

Once logged in, the Grantee Portal has six tabs across the top of the page (or in menu if on a mobile device). The tabs are:

- Home
- Applications (Funding Programs)
- Funding Requests (Grant Requests)
- Requirements
- Disbursements
- Organization

If a user’s screen size isn’t large enough to show all tabs, a More tab will appear that will dropdown to display the remaining tabs.



Figure 2: Tabs across the top of the page.

Figure 3: Tabs across the top of page with the More dropdown.

In addition these six tabs, there is a Notification dropdown and User Profile icon.

## Home Page

The Home Page of the Grantee Portal is a dashboard of important information. There are two list sections with organization specific information:

- Requirements
- Funding Requests (Grants/Grant Applications)

These sections are snapshots and clicking the “View All” takes you to the dedicated page for Funding Requests or Requirements, which is also accessible from the main navigation.

## Applications (Funding Programs)

Funding Programs are the containers that hold the specific Funding Requests (Grant applications). Funding Programs are open for a set period, in which an application can be submitted. Only open Funding Programs will be displayed.

Funding Programs

### Available

	Funding Program Name ↑	Due Date	Description	Application Type	Status
1	TEST: Crisis Response	12/31/2024		Crisis Response General Application	In progress
2	TEST: PUBLIC Crisis Response	12/31/2024		Crisis Response General Application	In progress
3	TEST: Small Organizations	12/31/2024		Small	In progress

Figure 4: Available Funding Programs.

## Apply to a Funding Program

To apply to a Funding Program, click on the appropriate Funding Program Name to view the details.

# TEST: Crisis Response

+ Follow

Funding Program Name TEST: Crisis Response	Notification Date ⓘ 1/31/2025
Total Requested Amount ⓘ	Start Date 1/1/2024
Due Date ⓘ 12/31/2024	End Date 12/31/2024
Description	

Have a question? Contact the program owner below.

Figure 5: Funding Program details.

To Apply, on the right-hand side, click Apply.

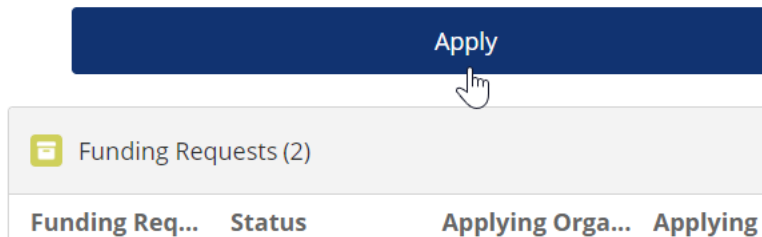


Figure 6: Apply button.

If an application has already been started for this Funding Program, there will be a Resume Application button in place of Apply.

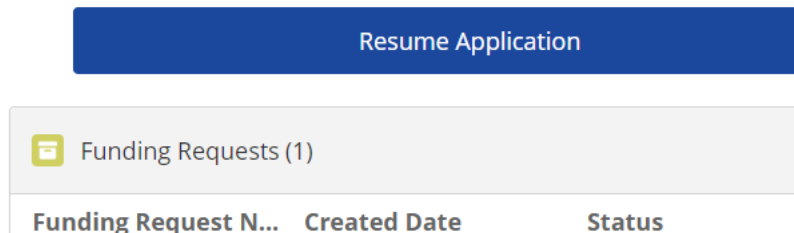
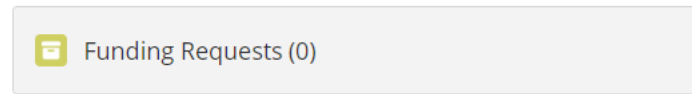


Figure 7: Resume Application button.

Note: An organization can only apply to one discretionary funding program at a time. If an application is started or submitted, the page will display, “You can only apply to one discretionary program at a time.” instead of the Apply button.

An organization can have a discretionary application submitted and still apply to our Giving Circles (A.L. Lewis, WGA, Beaches) in addition to receiving Donor Advised Fund (DAF) Grants.

You can only apply to one discretionary program at a time.



*Figure 8: Message if an application is already started in another Funding Program.*

Once a user click Apply (or Resume Application), the Application overlay screen will load. Fill out the application, which will have multiple screens. The application saves the information after every page and can be resumed later using the Resume Application button.

Each Funding Program application is different. Questions should be directed to the Program team at TCF. For convenience, there is a link to a downloadable blank copy of the application, however this is only to be used as a draft. All applications must be submitted electronically via the online portal.

Once an application is started, it will appear on the Funding Requests lists.

## Funding Requests (Grant Requests)

Funding Requests shows grant application information. There are four tabs:

- Pending: Shows any applications that are completed but a decision is pending.
- Approved: Shows all applications that are approved.
- Declined: Shows all applications that are declined.

The Funding Requests table shows different fields depending on the tab, Pending, Approved or Declined:

- Funding Request Name/Grant Application Name: the assigned name of the Funding Request, which will vary depending on the request's status.
  - The Funding Request name is hyperlinked to view the details of the Funding Request application.
- Public Fund Name: the TCF named Funding Program that this application falls within.
  - The Funding Program name is hyperlinked to show the program and is where an applicant goes to resume their application.

# Funding Requests

[All](#) [Pending](#) [Approved](#) [Declined](#)

Funding Request Name	Status	Awarded Amount	Funding Program
Pending -	Application in Process		TEST: Crisis Response

[View All](#)

Figure 9: Funding Request table.

## Funding Request Detail

The Funding Request details shows the specific information to this grant/funding request. To access the Funding Request details, click on a Funding Request Name from the Funding Request list.

The information shown is the information submitted via the application/grant request.

Pending - + Follow

Funding Request Name	Status
Pending -	Application in Process
Applying Organization	Funding Program
	TEST: Crisis Response
Requested Amount	Awarded Amount
Term Start Date	Term End Date
Requested For	
Special Conditions	

Figure 10: Funding Request details.

On the right-side, the list of Disbursements, Requirements and Files are available. Clicking on these hyperlinks will show additional information. Clicking on Disbursements or Requirements will take to that respective item's list page for this Funding Request.

★ Disbursements (1) <span style="float: right;">New</span>			
Disbursement	Status	Amount	Award Amount
<a href="#">D-84726</a>	Paid	\$100.00	\$100.00
<a href="#">View All</a>			
📁 Requirements (0) <span style="float: right;">New</span>			
📁 Grant Applications (0) <span style="float: right;">New</span>			

Figure 11: Disbursement, Requirements and Grant Applications section applicable to this Funding Request.

Note: If an application is in progress, the user will need to go to that Funding Program to continue the application.

## Grant Applications

Grant Applications are pages that the organization can view the contents of their application. The Grant Application page will vary based on the Application Type. The Grant Application is only available on the Funding Request (Grant) page. Grant Applications are only available for grants with applications dated October 1, 2025 or later.

## Requirements

Requirements are documentation that must be provided during the life of the grant and are typically tied to full funding of the grant. Most common types of requirements are Interim Reports and Closing Reports.

The Requirements list can be toggled between Open, Closed or All.

To view the Requirement Detail, click on the Requirement Name in the list. Requirements can also be accessed via the Funding Request detail page.

Requirements

<b>Open</b>	Closed	All	
<input type="checkbox"/> Funding Request Name	Requirement Name	Due Date	Status
1 <input type="checkbox"/> 23-043191	<a href="#">Closing Report</a>	12/31/2029	Open
2 <input type="checkbox"/> 24-044672	<a href="#">Closing Report</a>	6/1/2029	Open

Figure 12: Requirements list page.

## Fill out Requirement Form

To fill out a Requirement Form, click the link to the Requirement’s detail page, either from the Requirements list or the Funding Request. If the report is open, at the top of the page will display the “Fill out Requirement Form” button.

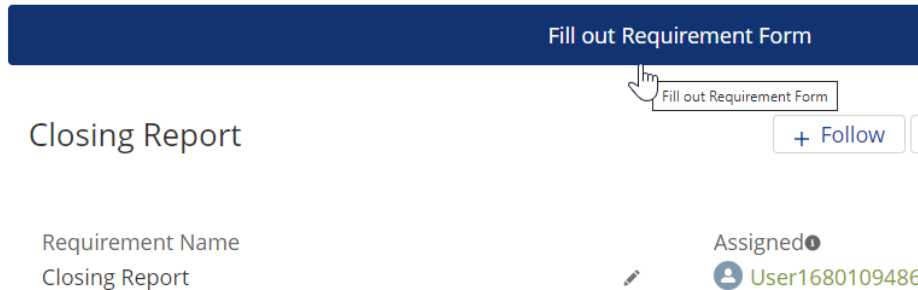


Figure 13: Link to Requirement Form.

Once the form is submitted, the requirement will go to “Submitted for Approval” status, in which TCF Staff will review the information submitted and mark it Complete, or reach back out to the end-user for additional information.

## Disbursements

Disbursements are the funds disbursed to a Grantee Organization. A list of Disbursements to the organization can be viewed on the Disbursements page. Disbursements to an individual grant can be viewed on the Funding Request detail page of a particular grant.

The Disbursements list can be viewed by Upcoming, Past or All.

### Disbursements

Upcoming **Past** All

	Funding Request	Disbursement	Amount	Disbursement ...
1	23-042435	D-88595		9/1/2024
2	24-045049	D-91476	\$2,500.00	4/2/2024
3	24-045047	D-91475	\$1,500.00	4/2/2024

Figure 14: Disbursements list.

To view an individual Disbursement, click on the link in the Disbursement column.

The Disbursement Detail page will show information such as:

- Grant Status
- Award Amount
- Disbursed Amount
- Disbursed/Awarded Date

# Organization

The Organization tab allows a user to maintain their organization. When an organization first creates an account, the organization must be reviewed by TCF. If the organization has not been reviewed, or approved, the Organization page will display:

“Your organization is currently under review. Please check back later.”

Users should reach out to TCF Program Team staff if this message remains for more than three business days. This message will not prevent a user from applying for a grant.

In addition, if TCF needs more information, a user may see the following message:

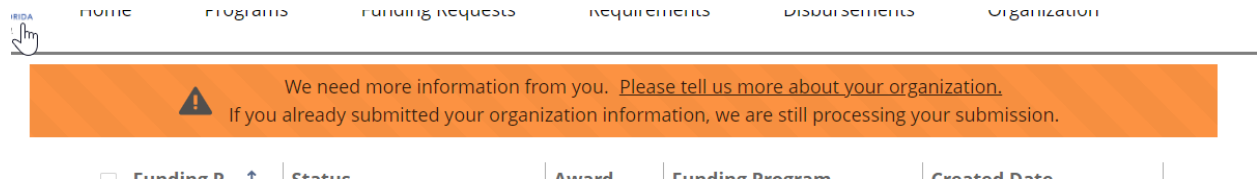


Figure 15: Need additional information about organization.

## Managing Organization

Once the organization is approved, an Account Manager can update some information about the Organization. By default, the first user of the organization will be the Account Manager. Other fields are locked and if they need to be updated, users can reach out to TCF.

To update the organization, click the Update Organization Information button on the right-side of the window.

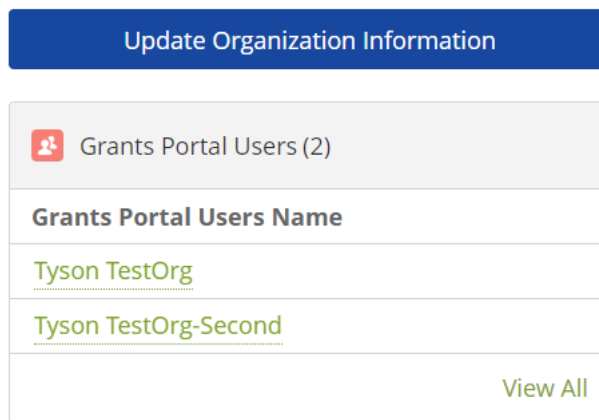


Figure 16: Update Organization and Users

## Managing Organization Users

To add new users, the new user should use the [New User Registration process](#). The user should have the Tax ID to be connected to the organization. Once the user is registered, an account

manager or TCF Program Team staff member will need to add a Role and Status to the user before they can access the organization's information or grant history.

An Account Manager user can update the roles of other users in the Organization. Click on a user to update their Role and Status.

Role options are:

- Account Manager: Allows the user to manage the organization, users of the organization and apply for and manage grants.
- Grants Access: Allows the user to apply for and manage grants. Read-only access to the organization.
- Read Access: Read-only access to the organization and grants.

Status options are:

- Requested: Requested to be part of the organization but hasn't been approved by either the organization or TCF staff.
- Denied: No access to the organization.
- Accepted: Access to the organization.

If a user leaves the organization, their access should be set to Denied. TCF Staff can remove the user permanently.

## Contact TCF Staff

If an end-user or organization has any questions or concerns, the TCF Staff can be contacted several ways. By phone at 904.356.4483, by emailing [info@jaxcf.org](mailto:info@jaxcf.org) or on the Organization page, using the Contact TCF Staff form.

If using the Contact TCF Staff form, the user can view and manage the submitted request.

No matter which method is used, a TCF Staff Member will reach out for resolution.

If you need to make additional changes to your Organization's profile or have further questions, please fill out the Contact TCF Staff form below or reach out to us at [info@jaxcf.org](mailto:info@jaxcf.org)

**Contact TCF Staff**  
Let us know what needs to be updated.

\*Subject

\*Description

Figure 17: Contact TCF Staff Form

## Profile & Settings

From the user icon in the upper right corner a user can access their profile and settings. The profile page will update user information. The settings page will allow the user to change their password.