

WHERE TO START

Where do I go to make a grant recommendation utilizing the new platform?

Step 1: Always begin at the Texas Women's Foundation website's home page located at txwf.org

Step 2: Select the button at the top-right hand corner of the screen which says "DAF Login"

Step 3: You must enter your username and password. Your initial username and password were sent to you by email when this new platform was introduced in January 2023. Contact William Capper at wcapper@txwf.org for assistance with your login.

Can any of the links that have been previously available to access the portal to make grant recommendations still be used?

All other links for making grants are no longer active.

If another link is used, it should redirect you to the new platform to begin the login process.

ACCOUNT LOGIN

In November 2022, each primary donor advised fund holder received an email with unique login information for the new portal. The same email included a request that each fund holder update their password for security.

A system generated confirmation email from mail@grantsapplication.com will be sent when the password is updated. Check spam folders and all other inboxes for the confirmation email.

If a confirmation email is still not received after 10 minutes, contact William Capper from the Programs and Grants team at wcapper@txwf.org.

There is a second person serving as an advisor on my donor advised fund. Do they share my account login/password?

No. Every authorized user for each fund should have and use their unique login to maintain security standards. Please do not share usernames & passwords.

If you want to add another person to your fund, please send the name and contact information for additional authorized persons to grants@txwf.org.

The email sent to all primary DAF holders in November 2022 included information to share with other authorized advisors on how to access their fund(s).

Is there a limit on how many login accounts one DAF can have?

No, there is no limit. Only authorized individuals have access to the fund as established in the original agreement when the fund was established. Please contact William Capper at wcapper@txwf.org with any further questions.

Does a donor advised fund holder with multiple funds need to set up multiple accounts?

No. The primary holder of a donor advised fund can use their login to access any of the donor advised funds connected to their account.

MAKING A GRANT RECOMMENDATION

Does it matter how I input dollar amounts (500, 500.00 or \$500)?

No. The program recognizes any of these inputs and will translate them correctly.

Can the software store grantee addresses and other contact information for repeat grantees?

Not at this time.

REVISITING GRANT RECOMMENDATIONS

Once logged in, how do I view my submitted applications?

Click the drop-down menu in the bottom right corner of your screen. Select "Submitted" recommendations to view all submitted applications.

Is historical information available for previous grant recommendations?

Currently, the portal will only show a history of recommendations made through the portal. If a granting history is needed, please contact William Capper at wcapper@txwf.org.

How do I delete a grant recommendation?

If the grant recommendation was not submitted, select "*In Progress Applications*" from the drop-down menu on the bottom right side of the screen. Next, click the garbage bin icon next to the desired application to delete it.

If the application was submitted, please contact TXWF staff at grants@txwf.org to request deletion.

Can I edit my grant recommendation (ex. change the amount, add 'In Memoriam', etc.)?

If the grant recommendation was not submitted, select "*In Progress Applications*" from the drop-down menu on the bottom right side of the screen. Next, select the application you wish to edit and make the necessary changes. Make sure to submit the application when you are finished.

If the application was submitted, please contact TXWF staff at grants@txwf.org to request edits.

FUND BALANCE

How do I check my Fund Balance?

Click the "Ask for Fund Balance" button from the TXWF DAF Grants landing page or contact the TXWF finance team at finance@txwf.org.