How to grant to a charity.

The portal has quick links for the most common actions, including recommending a grant disbursement. When you click this link from any page, you will be directed to the form to the right.

**STEP BY STEP**

1. **SELECT GRANT RECIPIENT**
   By clicking on the first button under Select the Grant Disbursement Recipient, you can access a list of recipients from your account history. Here, you can also search GuideStar, a national database of U.S. nonprofits, or manually enter the grant recipient name and address.

2. **ENTER THE GRANT AMOUNT**
   In this box, type in the amount of your grant.

3. **GRANT TIMING**
   Interested in scheduling your grant for a future date or making it a recurring grant? You can by selecting the timing of the grant here.

4. **RECOGNITION**
   Choose how you are recognized for your grant. Once recognition details are entered, they are available to select on subsequent recommendations. Grants can also be issued anonymously.

5. **GRANT PURPOSE** (Optional)
   Information entered in this first box will be included on the grant award letter sent to the charity.

6. **ACKNOWLEDGMENT**
   Please read the two acknowledgment statements carefully. Both boxes must be checked prior to clicking next.
7. PREVIEW
Use these icons to edit, view, or cancel the grant form.

8. ADD ANOTHER GRANT DISBURSEMENT
With the portal, you don’t have to process one grant recommendation at a time. By clicking the Add Another Grant Disbursement button, you can include additional recommendations in the same transaction.

9. SUBMIT SELECTED
When your grants are ready, first choose the Select All button and then simply click the Submit Selected button.

10. SUCCESS
Once your grant is submitted, you will be taken to the third and final screen to confirm that your grant is submitted for processing.

11. VIEW ALL GRANTS
Click Grant Disbursements on the main menu bar to view all grants, regardless of status.

REMEMBER
• Grant checks can only be mailed directly to the charity’s business address.
• You cannot receive benefits as a result of any grant payment. Impermissible benefits include tickets to events/galas, discounts, memberships, and auction items.