

Portal Quick Start Guide

Montana Community Foundation's online portal provides you with 24/7 access to your fund account at MCF.

As a portal user, you can do the following:

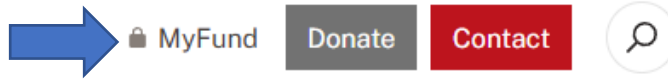
- Check your fund balance.
- Check your grantmaking balance (donor-advised funds).
- View the gift history for your fund (the history of contribution to the fund).
- Create quarterly statements.
- Recommend grants (donor-advised funds).
- View your history of grantmaking (donor-advised funds)

Registration Instructions

- Go to <https://mtcf.spectrumportal.net/#/accounts/signin>
- Click on the **Register** button (under the Sign-In button).
- Complete the registration form using YOUR name (not the organization or fund name) and your primary email address. Also include a cellphone number for multi-factor authentication purposes. Click on **Register** to submit the registration.
- You should immediately receive an email confirming that we have received your portal registration. Please don't log in immediately after registering; wait for the second email. (If you access the portal too early, you will not see your funds.)
- After one to two business days, you should receive a second email confirming that your registration is complete and you can access the portal.
- If you don't receive the emails, check your spam folder.
- When you log into the portal for the first time, please choose **"text"** as the option for multi-factor authentication. Please do not choose the "app" option.

Accessing Your Portal Account

To access your account after you are registered, visit <https://mtcf.spectrumportal.net/accounts/signin> or go to mtcf.org and click on **MyFund** on our home page.



Navigating the Portal

Access the menu on the top-left corner of the home page.



Fund Holder

- Home
- Recommend Grant
- Recommend Transfer
- Fund Summary
- Pending Recommendations
- Grant History
- Grant Opportunities
- Gift History

Menu Options

Fund Summary

- Click on **Fund Summary** on the Menu
- View the **Current Net Assets** (fund balance)
- View the **Current Available Balance** for grantmaking (donor-advised funds only).
- Nonprofit and designated funds will always show a \$0 current available balance.

To view your fund statements, click on **Report-Fund Statement**.

To view and download your fund statement, click on **Report-Fund Statement**.

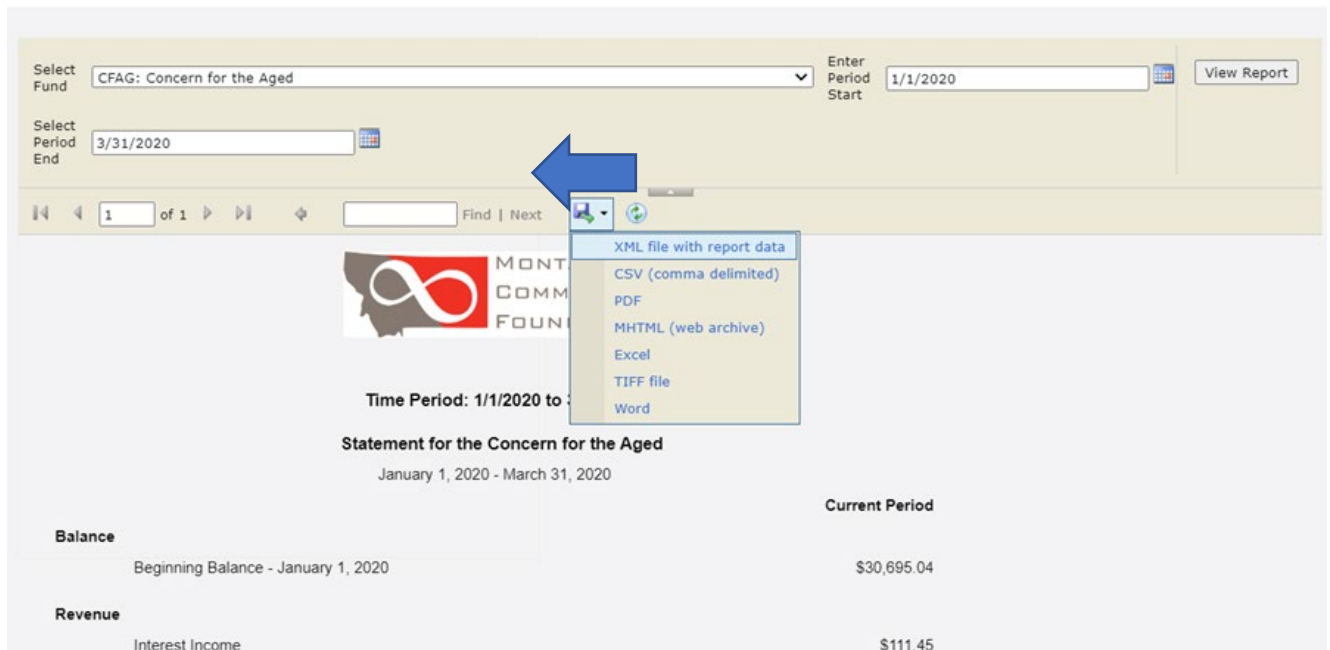
- If you have access to more than one fund, select the fund you wish to view.
- Next, select a custom reporting period.
- Click on **View Report** after you have chosen your start and end date.

Fund Statement

A screenshot of a web form titled "Fund Statement". The form has a light beige background. It contains two rows of input fields. The first row has a label "Select Fund" followed by a dropdown menu showing "<Select a Value>". To the right of this is a label "Enter Period Start" followed by a date input field containing "7/1/2019". The second row has a label "Select Period End" followed by a date input field containing "6/30/2020". To the right of these fields is a button labeled "View Report". There are small calendar icons next to the date input fields.

After you view the fund statement, you may download the statement in a variety of formats. You must first download the statement to print it from your computer.

Fund Statement



The screenshot shows the 'Fund Statement' interface. At the top, there are fields for 'Select Fund' (CFAG: Concern for the Aged), 'Enter Period Start' (1/1/2020), and 'View Report'. Below these are 'Select Period End' (3/31/2020) and a 'Find | Next' button. A blue arrow points to a download icon, which has opened a menu with the following options: XML file with report data, CSV (comma delimited), PDF, MHTML (web archive), Excel, TIFF file, and Word. The main content area displays the 'Statement for the Concern for the Aged' for the period 'January 1, 2020 - March 31, 2020'. It includes a table with 'Balance' and 'Revenue' sections, showing 'Beginning Balance - January 1, 2020' as \$30,695.04 and 'Interest Income' as \$111.45.

	Current Period
Balance	
Beginning Balance - January 1, 2020	\$30,695.04
Revenue	
Interest Income	\$111.45

Recommend Grant (advised funds only)

- Click on **Recommend Grant** on the menu.
- Click on **Recipient Search**.

Source Fund

Your **Available Balance** will not update as you enter new grant recommendations. It will update after the grant checks have been paid and mailed.

Fund * MWFN - Women's Foundation of Montana Endowment* SELECT FUND

Available Balance* \$5,833.60

Pending Grants & Payments \$0.00

* As of 2/18/2026 10:03 PM MDT 

Recipient Search

RECIPIENT SEARCH

NEXT

- Enter the name and city of your grantee.

Select a Recipient

Name *	Name
City	City
Zip	Zip

Search Results

No matching results

Cannot find a recipient? [Add a new one](#)

SEARCH	Cancel
---------------------------------------	---------------------------------------

- If you cannot find a recipient, use fewer words in the name field. If the search still fails, click on "Cannot find a recipient." Enter only the **Name** and **City** in the **Recipient Details** fields. You do not need to complete each field.

- Complete the **Grant Information** fields.
 - Don't use a decimal in the amount. Use only whole numbers.
 - If the grant is unrestricted, enter "unrestricted" or "operating support" in the Grant Purpose field.

Grant Information

Click on "Edit" below to enter grant information. The minimum grant amount is \$500.

Please enter whole dollar amounts only.

Amount *

(Suggested minimum is \$500)

Recurring Payment

☐

Payment Frequency *

Grant Purpose *

How would you like the funds to be used?

Special Request

Notes to Staff

- Complete the Review and Submit page by clicking "**I agree.**"

Review and Submit

Summary

Fund MWFN - Women's Foundation of Montana Endowment*

Recipient YWCA Missoula

Amount \$10.00

Check Designation operating

Legal Statement

By checking this box, you are agreeing to adhere to the IRS restrictions and conflict of interest disclosures discussed below:

The IRS DOES NOT allow community foundations to make grants that:

- Satisfy a previously made pledge
- Provide more than incidental benefit to fund advisors (IRS 4967)

Conflict of interest disclosure: I acknowledge that I and any other Fund advisor/s have no interest in/relationship with the organization being recommended. With a local community foundation advised fund, if a relationship exists, the attached copy of committee minutes discloses each conflict and that the recommendation was approved by a majority vote of disinterested advisory committee members. I understand that final approval of this recommendation rests with the Foundation Board of Directors, whose charge it is to see that all grants are consistent with the Fund's and the Foundation's purposes, as required by IRS regulations.

I Agree * ☐

Upon submission, you will receive an email notifying you of the submission. If you do not receive the notification, please contact the foundation.

- To make a grant recommendation for an interfund transfer to another fund at Montana Community Foundation (e.g., Women's Foundation of Montana), contact our Impact Department staff at (406) 541-7408.

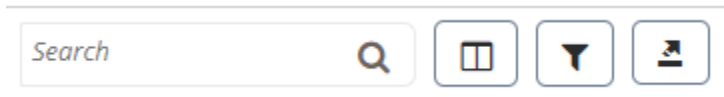
Pending Recommendations

If you are unable to complete a grant recommendation, access it later by selecting **Pending Recommendations** from the drop-down menu.

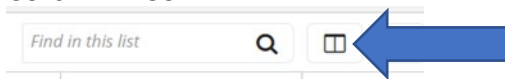
Under **Pending Recommendations**, you can also view the grant recommendations that you have entered, but that have not yet been mailed to the grantee. Once grant checks are processed, you will see your recent grant recommendations under the **Grant History**.

Grant History

- The Grant History Page has grant history for the past five years only. If you need additional history, please call our Impact Department at (406) 541-7408.
- You may search by grantee name or use the filter function to narrow your search.



- You may choose the columns that will show in the list by clicking on the column icon.

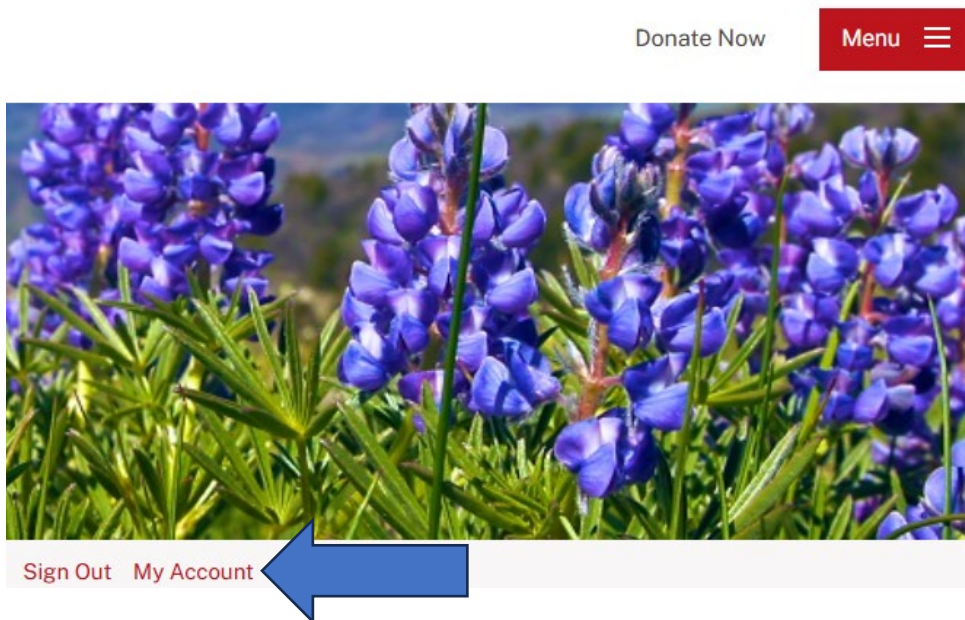


- To download the data, click on the download button and choose the format you wish to use.



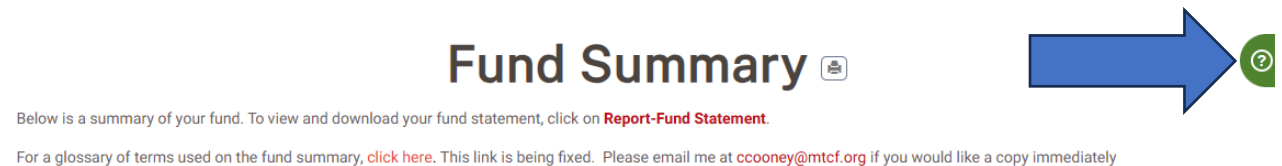
Changing Your Password

To **change your password or edit contact information**, click on **My Account** from the navigation bar at the top of your home screen.



Finding Help

Each page on the portal has help topics to answer your questions. Click on the green half circle for additional information.



Need additional help? Contact our Helena office at (406) 443-8313.

**Thank you for partnering with
Montana Community Foundation!**