



National
Philanthropic
Trust

Your partner in giving

Online Grantmaking Instructions

You can log in to your DonorView account to submit grant recommendations, schedule recurring grants, obtain program forms and access other donor-advised fund account management options.

If you are not already accessing your donor-advised fund account online, please contact us at **(888) 878-7900** or **npt@nptrust.org** to receive your online account access instructions and temporary password.

Managing Your Charity List

Your Charity List is a list of charities you identify as your favorites. You can recommend a grant directly from this list. To access and update Your Charity List, click the **Grants** tab in the top navigation or the **Recommend a Grant** button under the **Quick Actions** on your donor portal home page.

1. Click **"Find a Charity"** at the top to search an organization
2. If your charity appears in the results, click **"Save"** next to its name to add it to Your Charity List
3. If your charity does not appear in the search results, click **"Recommend a New Charity"**
4. Enter information about the charity (name and mailing address are required) and click **"Submit"** to save it to Your Charity List
5. If you want to take an organization off your list, click the red X for **"Remove From List"** next to the charity name

Entering a Grant

To access Your Charity List, click the **Grants** navigation tab or the **Recommend a New Grant** button.

1. Click **"New Grant"** next to the charity name
2. Enter the frequency and amount of your grant
3. Indicate your recognition preference
4. Select a grant purpose and add any additional relevant information
5. Click **"Next"** to review grant details and acknowledge terms
6. Click **"Submit Grant Recommendation"**

Viewing Grant Status or History

To view your grant history, click the **Grants** navigation tab.

1. Click on one of the **"View Your Grants"** options (All Grant History, Single Grant History, or Recurring Grant History)
2. Select **"Adjust Date Range"** above the search box to enter a specific time period
3. Use the drop-down box to narrow your search by grant status
4. All history can be exported as an Excel spreadsheet or PDF