



Online Grantmaking Instructions

Your DonorView was recently enhanced to make navigation easier. To access your new dashboard, please go to www.nptrust.org and click the "Donor Login" button at the top. If you have any questions, please call us toll-free at (888) 878-7900.

Online Account Access

NPT's DonorView lets you review your account balances, update your contact information, submit grant recommendations, schedule recurring grants and obtain program forms.

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

Entering a Grant: Click the Grants tab or "Recommend a New Grant" on the Home tab

If the charity is already listed on your favorite charity list:

1. Click "New Grant" beside the charity name
2. Enter the amount of your grant (you do not need the \$ sign)
3. Enter contact, comments (grant purpose), special instructions, and other relevant information
4. Click "Submit Recommendation"
5. Click "Confirm"

If the charity is **NOT** on your favorite charity list:

1. Click "Add a New Charity"
2. You will be prompted to search the database. Type a partial or full name of the charity to search
3. If the charity is present in the database, click on the charity name. This adds it to your favorite charity list
4. If the charity is not present, click on the highlighted text, "Suggest a Charity" located below
5. Fill in the form with the charity information and submit
6. Click "New Grant" beside the charity name
7. Enter the amount of your grant (you do not need the \$ sign)
8. Enter contact, comments (grant purpose), special instructions, and other relevant information
9. Click "Submit"
10. Click "Confirm"

Viewing Grant Status or History

1. Click the Grants tab
2. Click on one of the "Grant History" options
3. Widen the date range to see advanced history
4. All history can be downloaded to an Excel spreadsheet