# NYFA Fiscal Sponsorship | Online Account Manual

This manual provides detailed instructions for accessing and using your online account with NYFA Fiscal Sponsorship. If you have any issues or concerns, please contact sponsorship@nyfa.org.

Our website is optimized for Chrome, so you should use this browser when updating your site and encourage donors to also use Chrome. Please keep this in mind as you build your page and income buttons through NYFA.

Create a Payment Request:

1. From nyfa.org, click the **Sign In** button at the top right corner of the screen. Enter your user ID (email address) and password.

    If you have forgotten your password, please click "Forgot Password?" If you have forgotten your User ID, please contact sponsorship@nyfa.org.
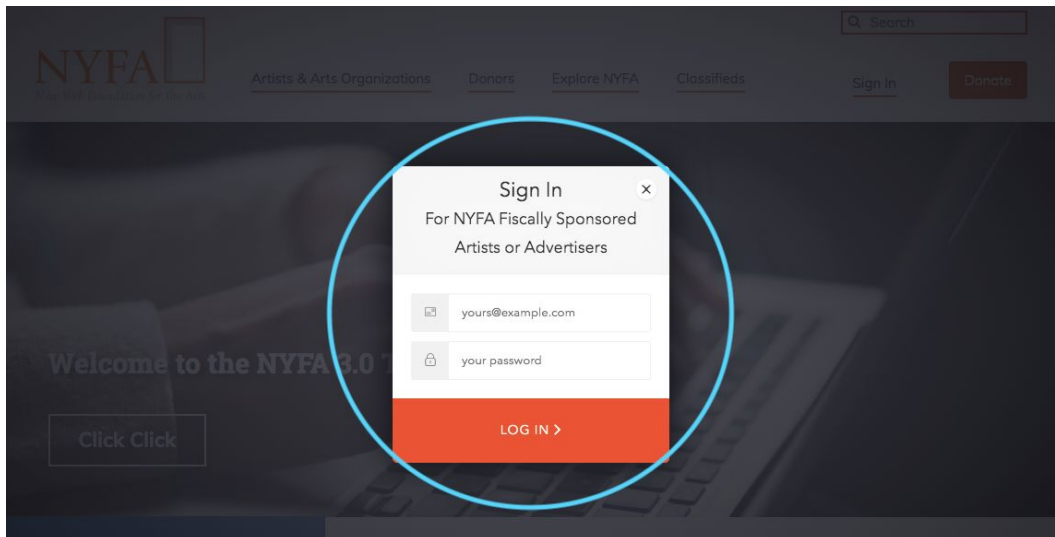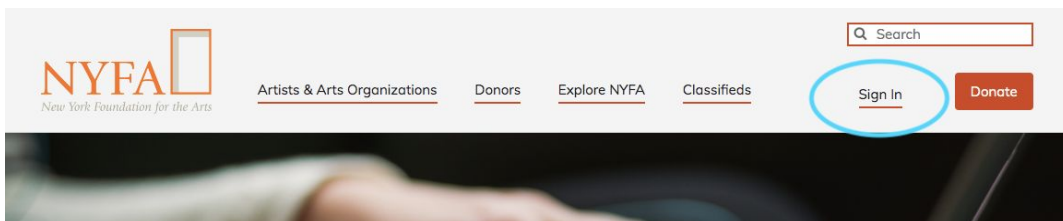
2. Once you are signed in your name will appear where it said Sign In. From this menu you can navigate and manage your Fiscal Sponsorship account and requests by clicking **Fiscal Sponsorship.**

3. To withdraw funds from your account you need to submit a payment request. You can click on the left side menu option for **Payment Requests** under the Funds Management header.
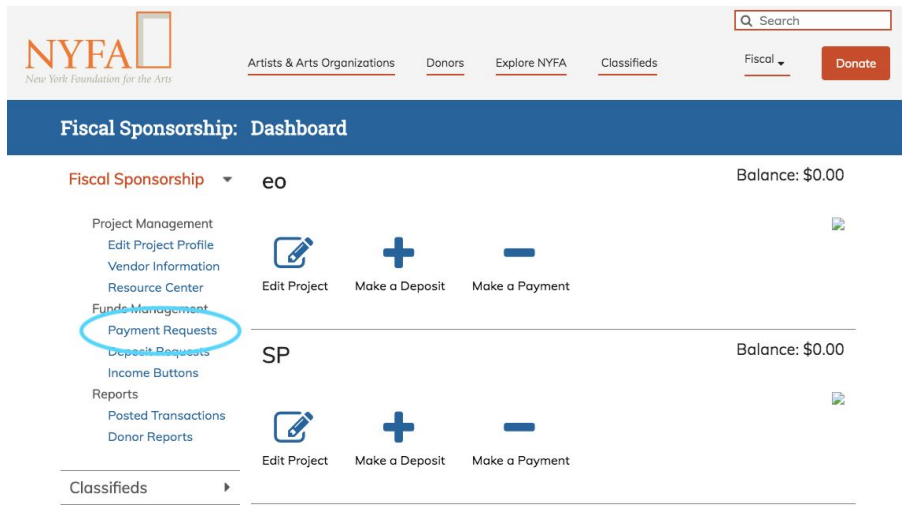
4. If you have multiple projects you can select which one you are making a request through from the top pulldown menu. When your project is selected, you can click the orange **+Make a Payment** button on the top right.
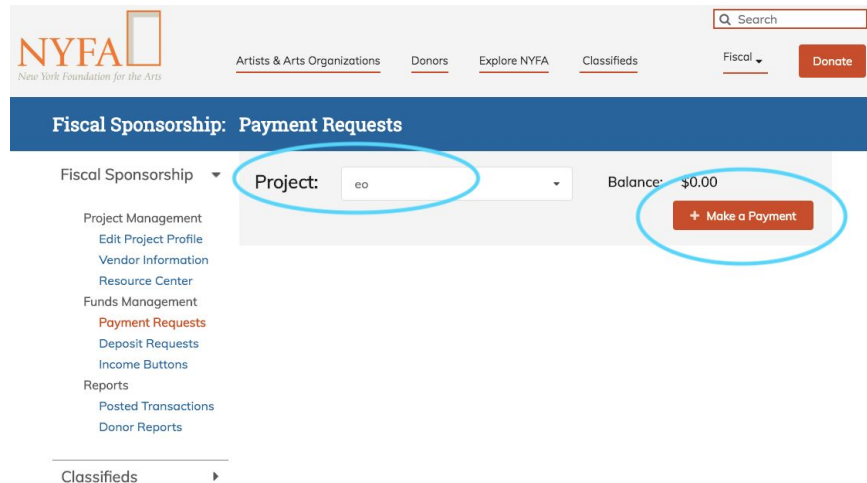
5. From here you will fill out all the necessary fields.

    Type of Payment: Vendor, Reimbursement, or Cash Advance (for emergencies or international travel ONLY).
    Payment Amount
    Pay To: select a vendor in our system already OR add a new vendor by selecting the orange **Create New Vendor** button**.**
    Delivery Method,
    Requestor Notes
    Add Invoice.

    -   If any of these fields are missing information you will not be allowed to submit.
    -   If adding a new vendor You **MUST** upload a PDF or PNG of the W-9 in order to submit a new vendor.

6. If after you submit you need to make any changes or edits you can go back in before we have processed the request to make changes by clicking on the icon next to the request on the right side.

7. You should now see a record of the submitted payment request on your Payment Request page. For the financial procedures timeline, please see the Financial Procedures manual provided with your welcome packet.

[End of Payment Request]

Deposit Funds in your account:

1. After you are signed in and in the Fiscal Sponsorship Dashboard you will select the **Deposits Request** option under the **Funds Management** header on the left hand side of your screen.

2. Select your project from the menu on the top (be especially attentive if you have multiple projects) and then click the orange **+Make A Deposit** button on the upper right side.

3. Fill in - **Requestor Note (optional)** and select **Type of Check** from the drop down.

4. When you select the **Type of Check** from the pulldown menu you will see one of 2 options - Donation or Mixed Income. Select the one that applies to your deposit and a new window will appear for you to fill in the required information -
   Check Number
   Date
   Amount
   Donor details.
   If you check is mixed it will also ask for split between donation and earned income amounts.

5. If the donation is over $2,500, a donation letter MUST be included. Donations above $2,500 without letters will not be processed until a letter is received. A copy of this letter can be found on Fiscal Sponsorship Internal.
6. If the donor wishes the donation to be Anonymous, please check the Anonymous Donation box. Please note that donations cannot be made anonymous retroactively. Pay special attention to the donor's wishes if it is a concern.

7. If after you submit you need to make changes you are allowed to edit again by clicking the icon to the right of the submission.

   You then need to mail or drop off your check to NYFA. The check needs to be made out to 'New York Foundation for the Arts' in order for us to deposit it. Once the deposit is received, confirmed and deposited into your account, your Dashboard will reflect your new balance. Checks are usually deposited Fridays and Artist Projects will receive an email and copy of the checks.

[End of Deposit Funds]

UPDATE YOUR PROFILE PAGE IN THE NYFA DIRECTORY

1. From nyfa.org click the **MY NYFA** button. Enter your user ID (email address) and password. *If you have forgotten your password, please click "Forgot Password?" If you have forgotten your User ID, please contact sponsorship@nyfa.org.*

2. From here you can navigate and manage your Fiscal Sponsorship account. Click the **Edit Project Profile** on the left side from the list below Project Management or the icon more centered on the screen..
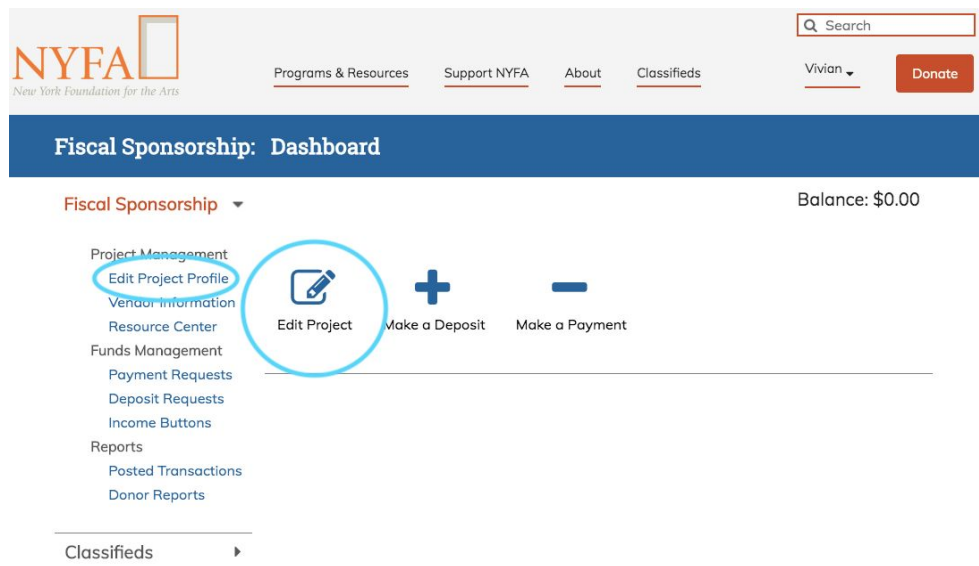
3. The Project Editor has a few editable components. The **Gallery**, whose edit button appears at the top of your page, followed by the **Project Editor Box,** which appears below.
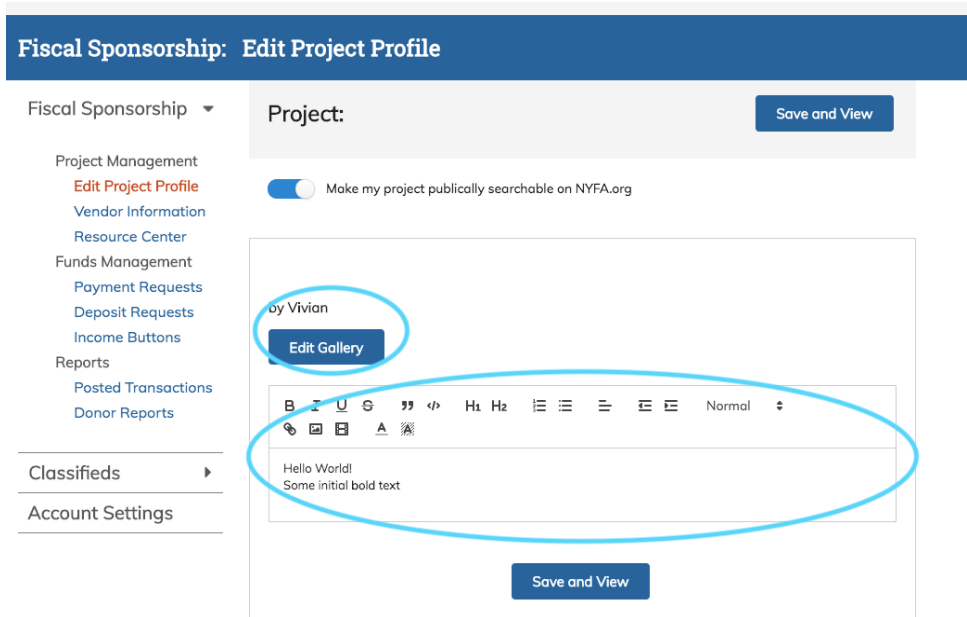
4. Click **Edit Gallery** to add an image to your project page. In order for your profile to be searchable in the Directory, you must upload a photo to this Gallery and toggle "make my project publicly searchable".

Your profile page can still be shared with a private link, but it will not be searchable by the public until you upload an image to your gallery. Simply click **Choose File** on the left side to select your image. Once uploaded click **Upload File** on the right side.
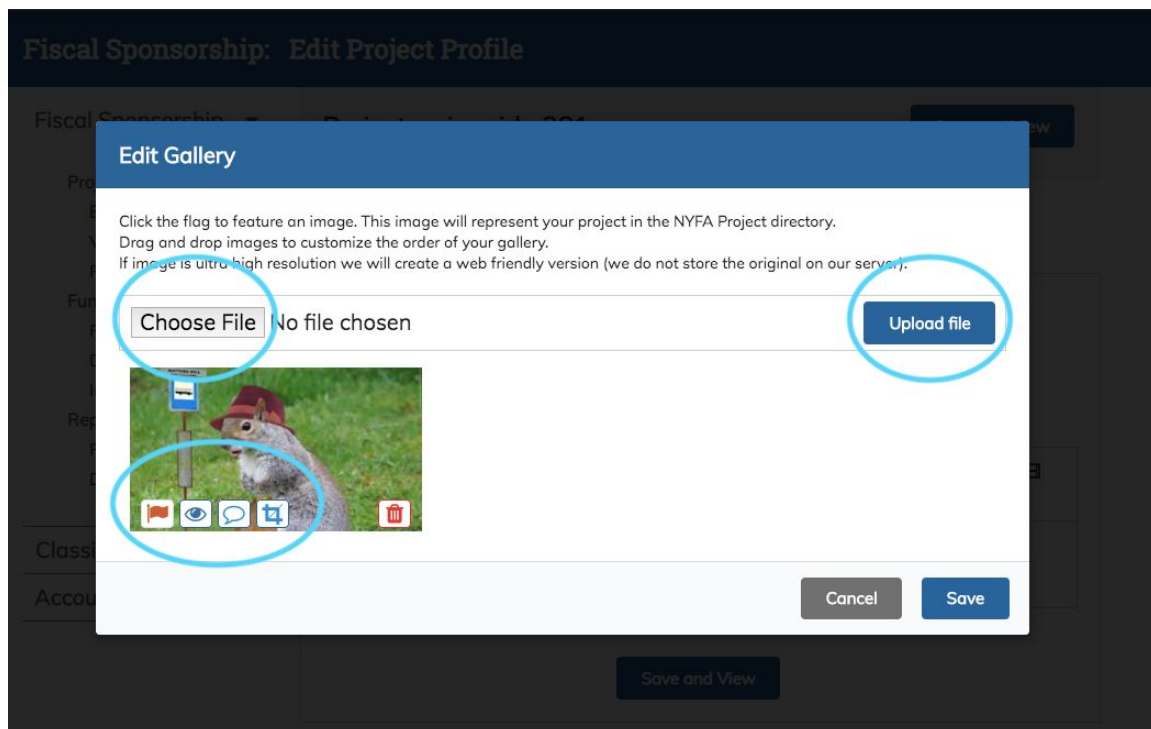
 5. Several tools appear in your newly uploaded image box that allow you to modify your uploaded image:

1. Make an image your Featured Image with the red flag icon.
2. View full-size image by clicking the eye icon.
3. Add caption information with the speech bubble icon.
4. Adjust the cropped thumbnail for your image. Note that aspect ratio is already set to fit the specific size of the thumbnail.

6. Hit **Save.**

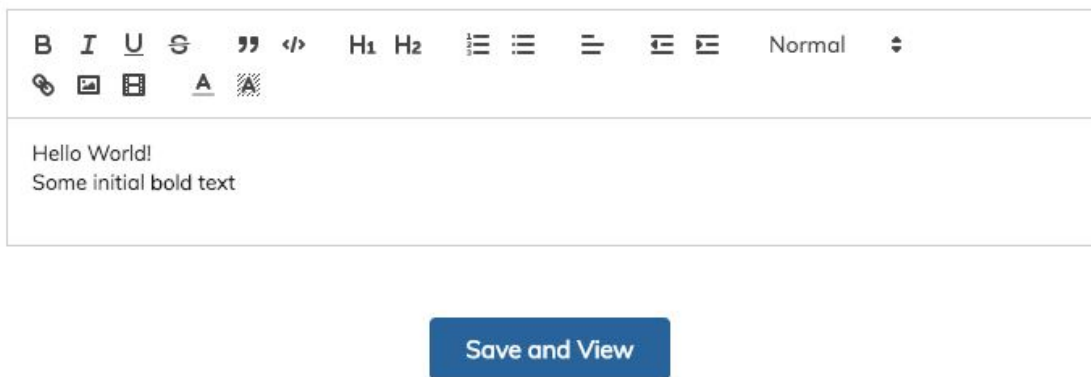7. Add language content to your project description by clicking in the text box. The Project Name and Description will already appear with the information NYFA Fiscal Sponsorship staff received upon registration. *You must speak with Fiscal Sponsorship staff to change your Project Name.* Click the **Save and View** button to save and view your changes

8. The edit box offers many options for you to play with the look and design of your text with the basic tools. You can also add additional images and video links about your project.

*It is recommended that images are no larger than **2MB** as it may create a system error during the upload.*

9. Video: In order to add video to your project page, you must embed video by clicking the **film strip icon** on the description toolbar of the Project Editor Box. You will be prompted to add a link. Copy the source code for your video from YouTube, Vimeo or another video sharing platform and place in this box. Often you can find the source code through the "share" option on these platforms. You cannot add videos to your profile without first embedding video source code. In the toolbar of the Description section of your Project Editor (shown above), select the **YouTube** button.

10. To preview the look of your page hit **Save and View.**

Save and View

[END OF ARTIST PROJECT PAGE]