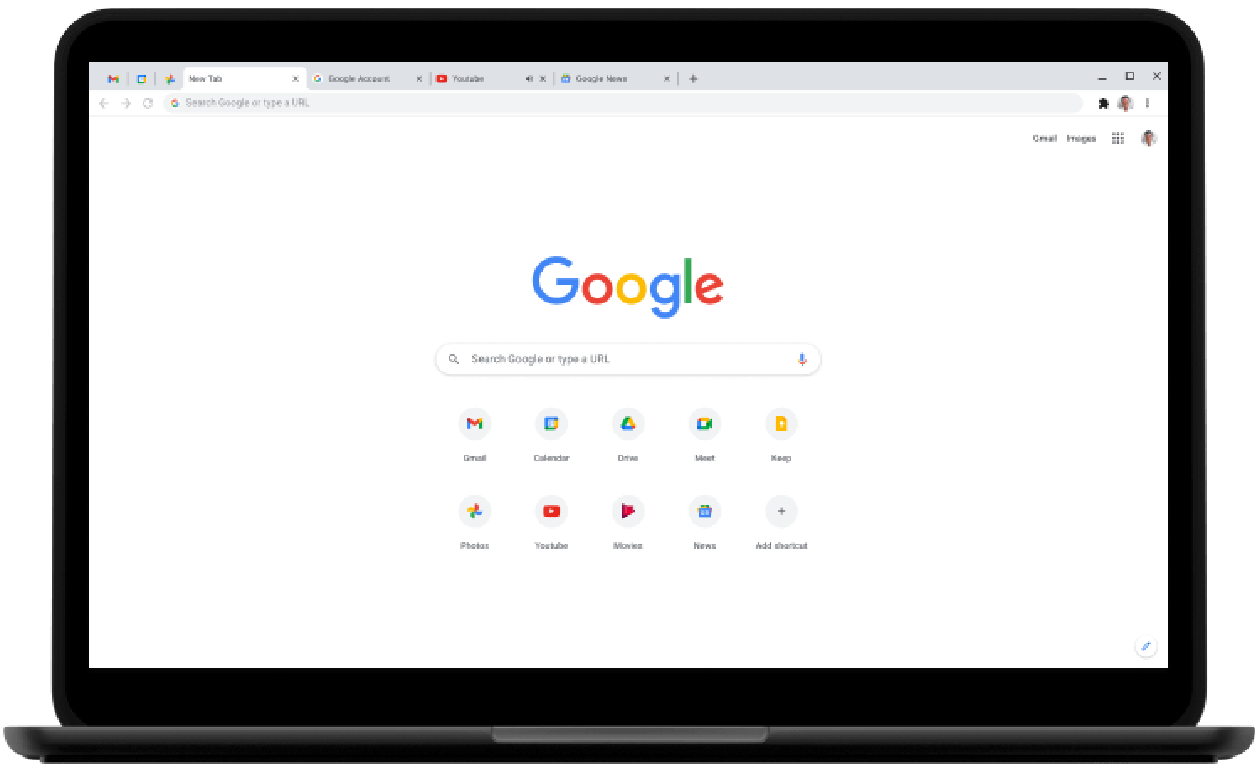
NYFA Fiscal Sponsorship:

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.

Updated Jan 13, 2023

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.



Updated Jan 13, 2023

Table of Contents

Create a Payment Request:

- The Payment Request Schedule for Artist Projects:
- The Payment Request Schedule for Emerging Organizations:

Complete Submittable ACH Transfer Form:

Deposit Funds Into Your Account:

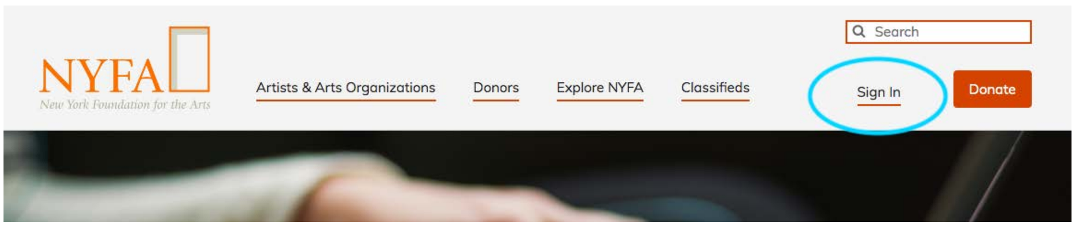
Update Your Profile Page In The NYFA Directory

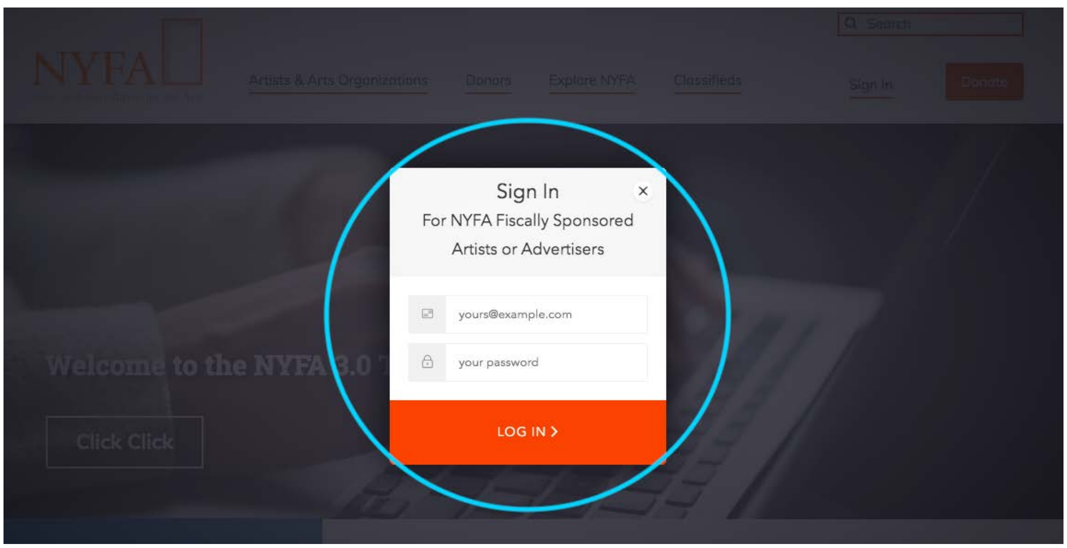
Income Buttons

Create a Payment Request:

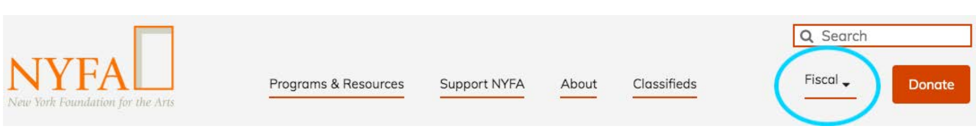
1. From nyfa.org, click the **Sign In** button at the top right corner of the screen. Enter your user ID (email address) and password.

   **If you have forgotten your password, please click "Forgot Password?" If you have forgotten your User ID, please contact sponsorship@nyfa.org.*

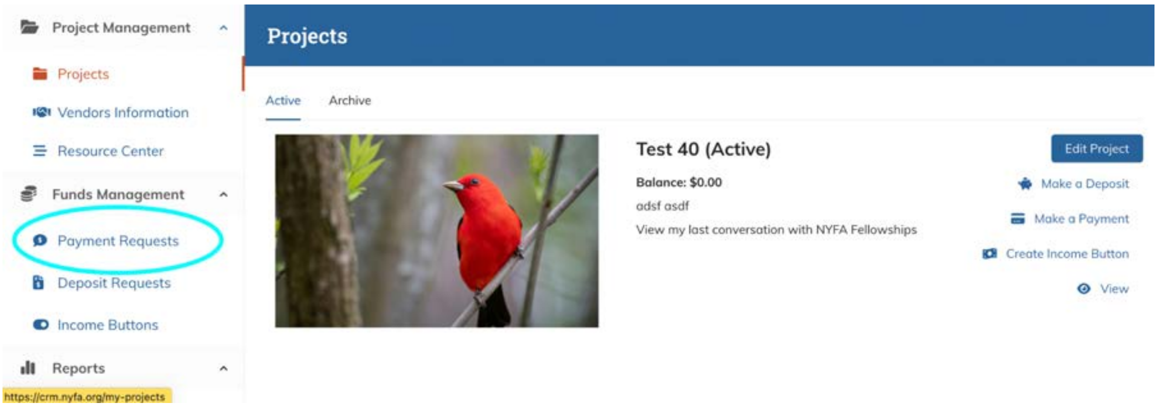




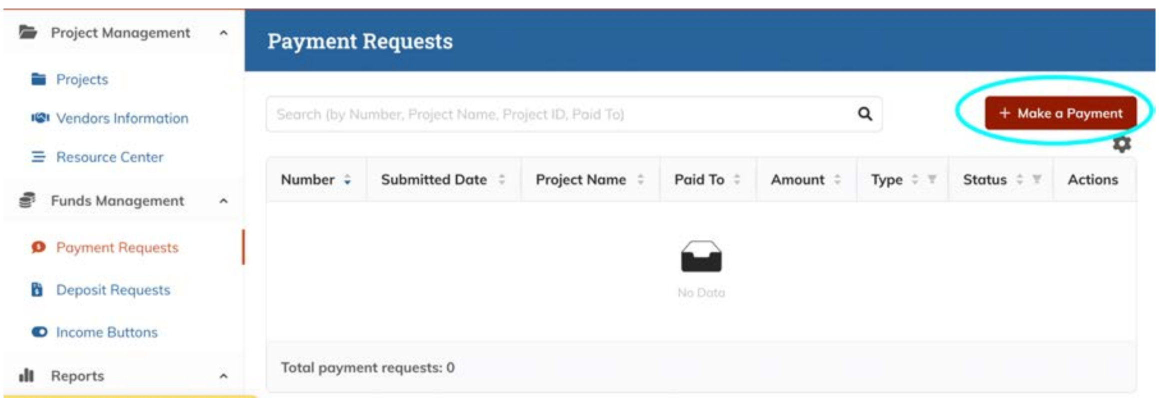
2. Once you are signed in, your name will appear in the corner where it previously said "Sign In". From this menu you can navigate and manage your Fiscal Sponsorship account and requests by clicking **Fiscal Sponsorship.** This will direct you to your Fiscal Sponsorship Dashboard.



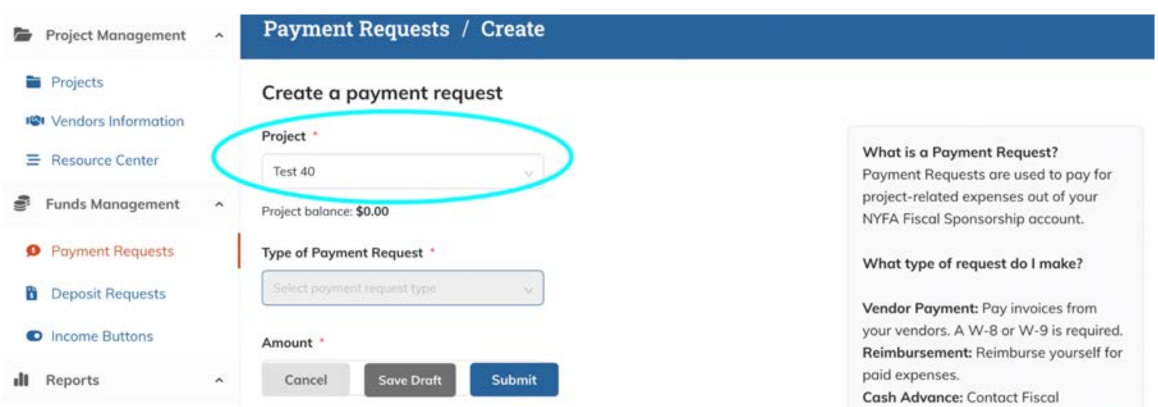
3. To withdraw funds from your account you need to submit a payment request. You can click on the left side menu option for **Payment Requests** under the Funds Management header.



4. If you have multiple projects you can select which one you are making a request through from the top pulldown menu. Select the **+ Make a Payment** button on the top right.

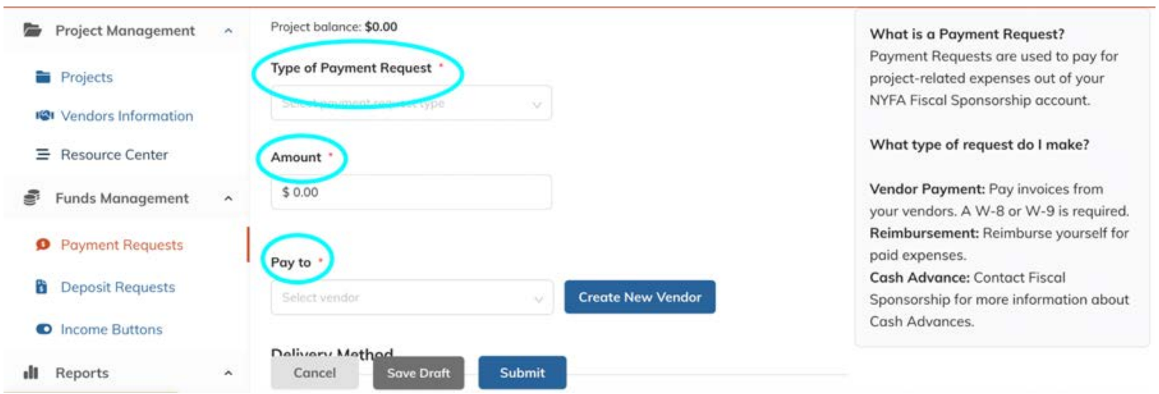


5. You will select your project name.



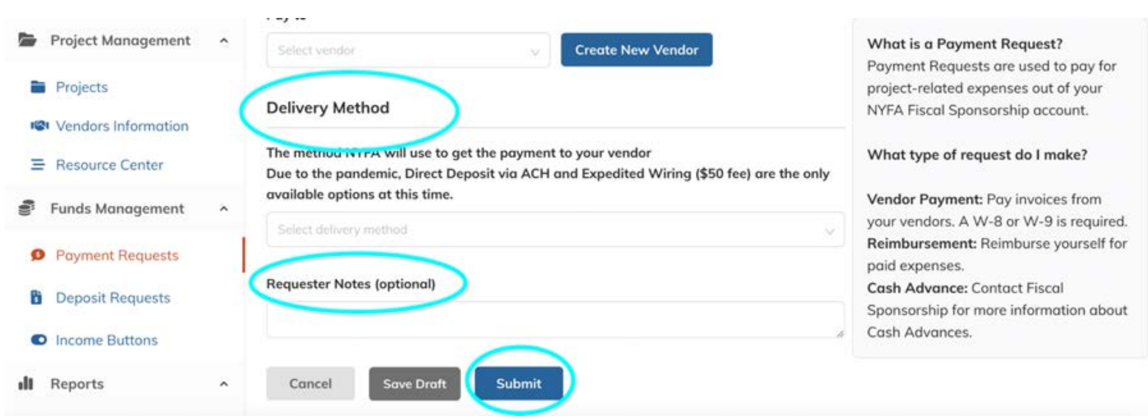
6. From here you will fill out all the necessary fields.

- **Type of Payment**: Vendor *(for paying a person or business directly)*, Reimbursement *(for reimbursing yourself for expenses paid out of pocket)*, or Cash Advance *(for emergencies or international travel ONLY)*.
- **Add invoice** (vendor payments) **or receipts** (reimbursement requests) **or an expense budget** (cash advances).
- **Payment Amount:** This field will be automatically added if the request is a Reimbursement. For Vendor payments or Cash Advances, enter the total payment amount.
- **Pay To:** select a vendor in our system already OR add a new vendor by selecting the **Create New Vendor** button**.**
    - If adding a new vendor you **MUST** upload a PDF or PNG of the W-9 in order to submit a new vendor.
    - If any of the required fields are missing information you will not be allowed to submit.

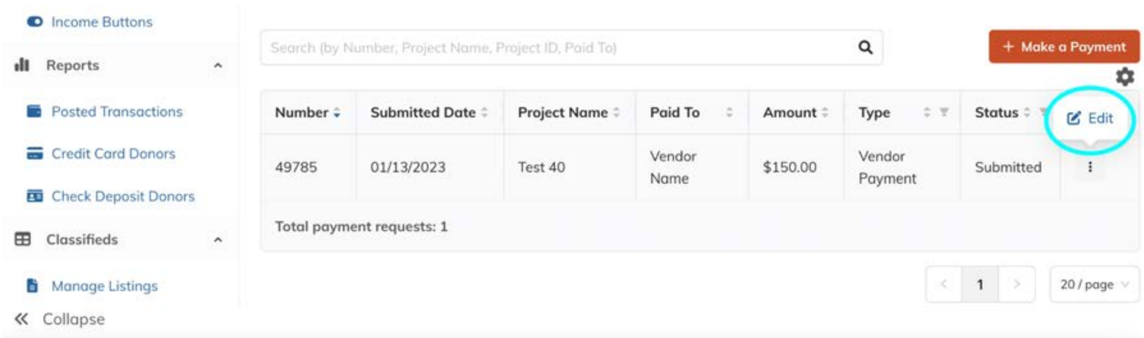


Scroll to continue and fill out the necessary fields.

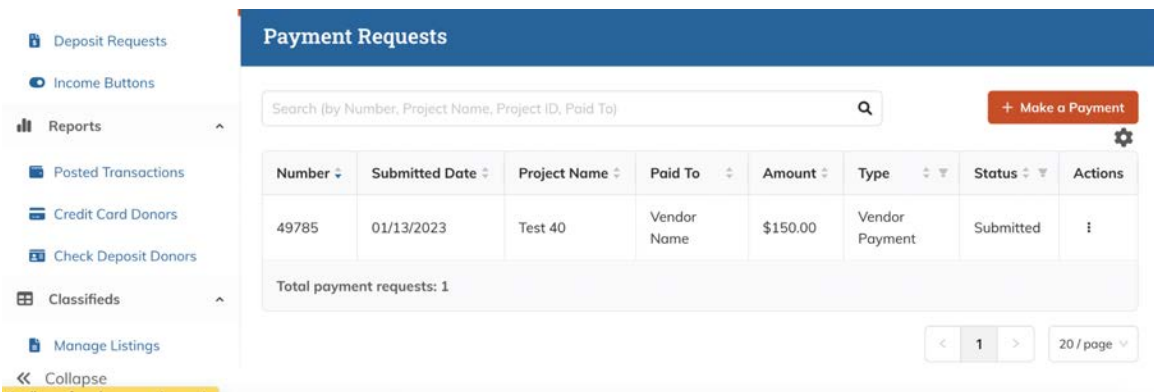
- **Delivery Method:** Select **'**ACH Direct Deposit' (our primary delivery method) or 'Other' (for wires only).
- **Requestor Notes** (Optional)



7. 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 pencil icon next to the request on the right side.

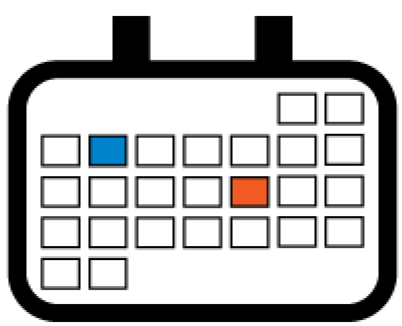


8. You should now see a record of the submitted payment request on your Payment Request page. For the financial procedures timeline, please see the Financial Procedures manual provided with your welcome packet.



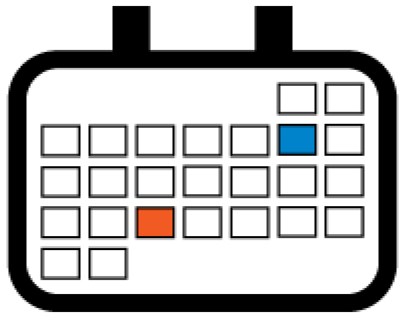
Payment Request Schedule for Artist Projects:

- Payment requests and vendor ACH information are due to NYFA on Mondays at 5:00 PM EST for weekly processing. If there is a delay in receiving either item, the payment will be delayed.
- Vendors will receive their ACH transfer no later than the following Thursday. If your vendor did not receive their request by the following Friday, please let us know so we can track down your request.



Payment Request Schedule for Emerging Organizations:

- Payment requests and vendor ACH information are due to NYFA on Fridays by 5:00 PM EST for weekly processing. If there is a delay in receiving either item, the payment will be delayed.
- Vendors will receive their ACH transfer no later than the following Tuesday. If your vendor has not received their request by the following Wednesday please let us know so we can track down your request.



Complete Submittable ACH Transfer Form:

In order to complete your payment request you will need to submit an ACH form with your vendor's direct deposit information.

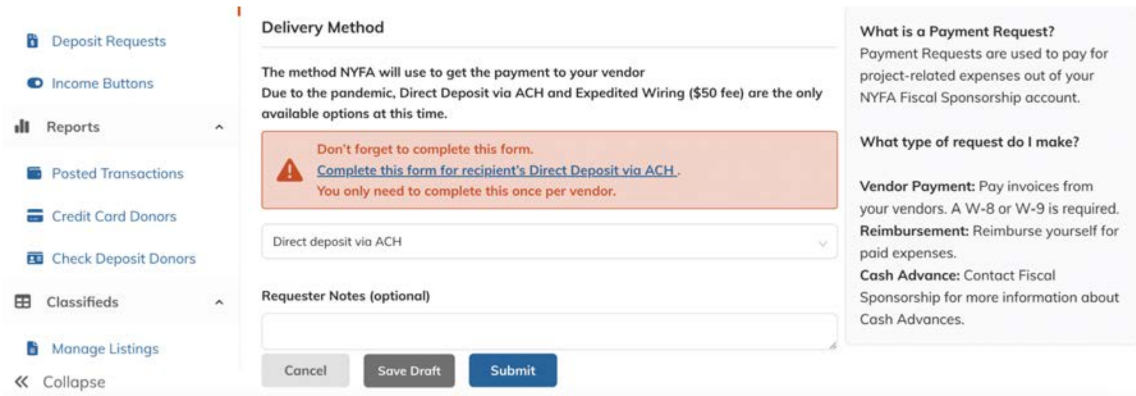
OR

You can also send the Submittable link below directly to your vendor for them to fill out the form themselves.

https://nyfasponsorship.submittable.com/submit/0f67c692-d6cc-40dc-b920-7ef3c751b5d7/fs-nyfa-payee-info-for-ach-transfers

Instructions

1. When filling out a Payment Request there will be an orange box with a message prompting you to fill out the submittable form. Click the link to open the form.



2. A new page will open on your browser launching Submittable. The opening page will instruct you on how to fill out the form and NYFA's weekly payment request schedule. **To see the full form, the person that is submitting this form is required to sign in or set up a Submittable account.** Sign in options are at the bottom of the page.

3. When you have signed in. Scroll down to see the first part of the form. Here you will fill out all the necessary fields with your information.

    Address 1

    Address 2

    City/Town

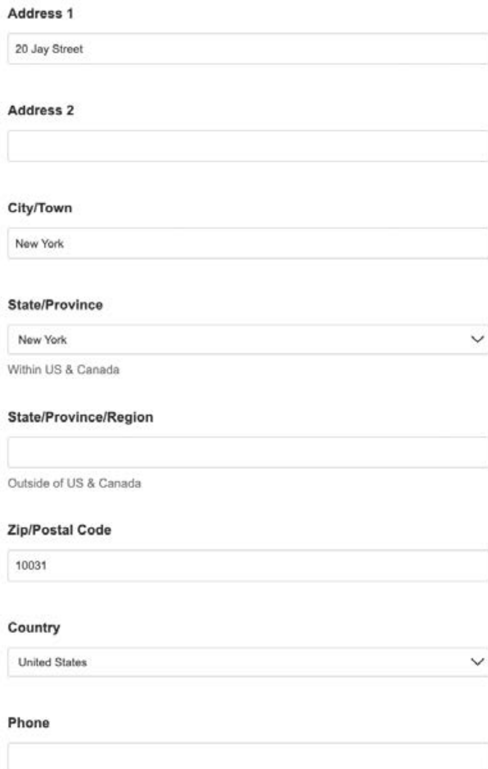
    State/Province - Within US & Canada

    State/Province/Region - Outside US & Canada

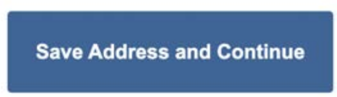
    Zip/ Postal Code

    Country

    Phone

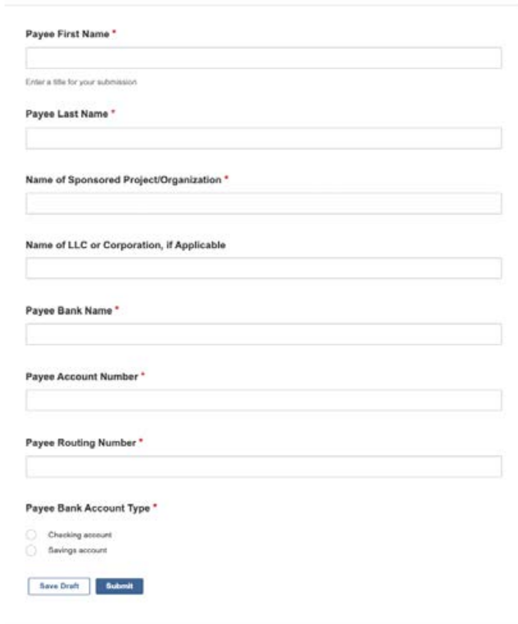


To continue to the next part of the form select **Save Address and Continue** at the bottom right of the form.



4. Scroll down to see the second part of the form. Here you will fill out all the necessary fields with the payee's information.

    Payee First Name
    Payee Last Name
    Name of Sponsored Project/Organization
    Payee Bank Name
    Payee Account Number
    Payee Routing Number
    Payee Bank Account Type - Select Savings Account or Checking Account



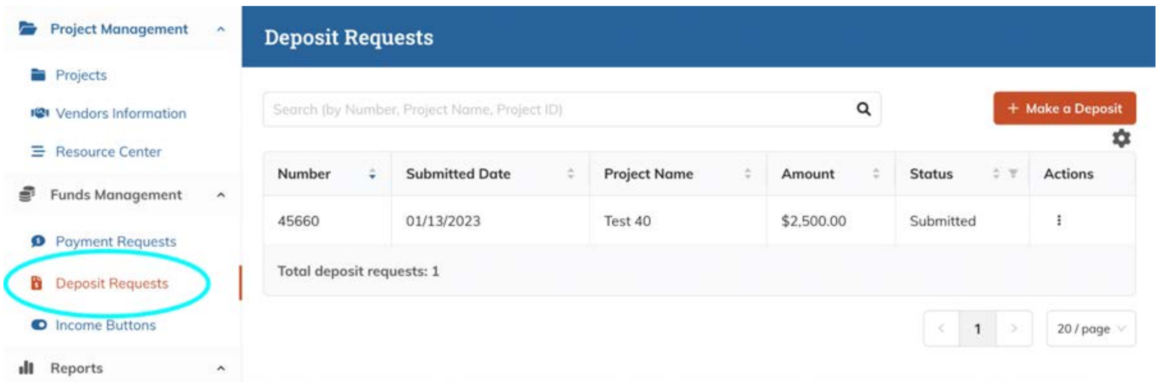
5. Review the information entered into the form. After you have reviewed the information, select **Submit** to complete the form. You MUST submit the form for the information to be processed

[End of Payment Requests]

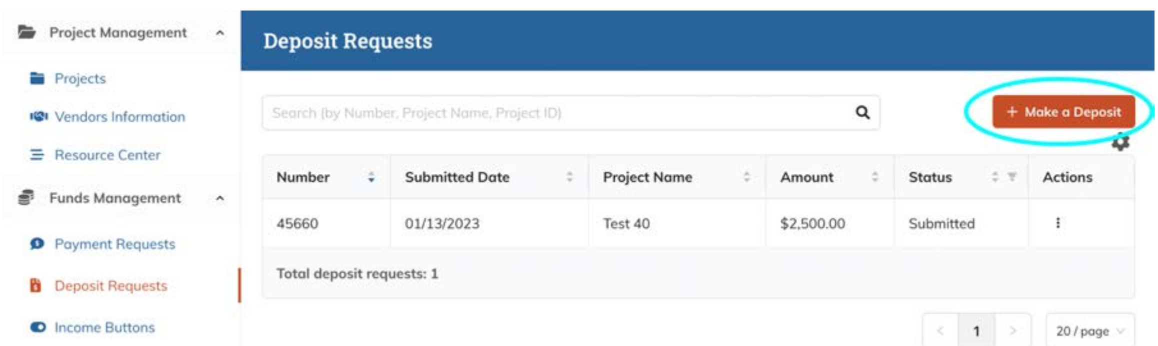
Deposit Funds Into Your Account:

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.

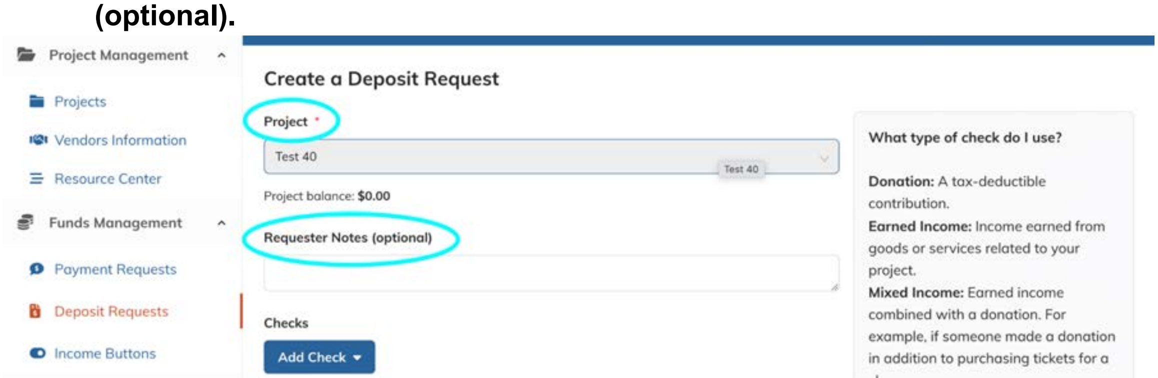
   The check needs to be made out to **'New York Foundation for the Arts'** with your project name in the memo of the check, in order for us to deposit it. We cannot deposit checks made out to the project, project director, or 'NYFA'.



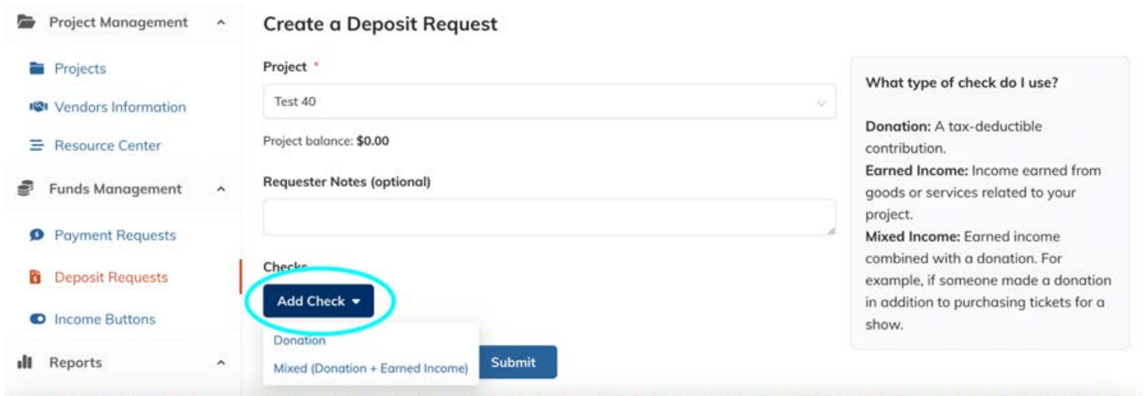
2. Select **+Make A Deposit** button on the upper right side.



3. Select the **Project** to receive the deposit and fill in - **Requestor Notes (optional).**

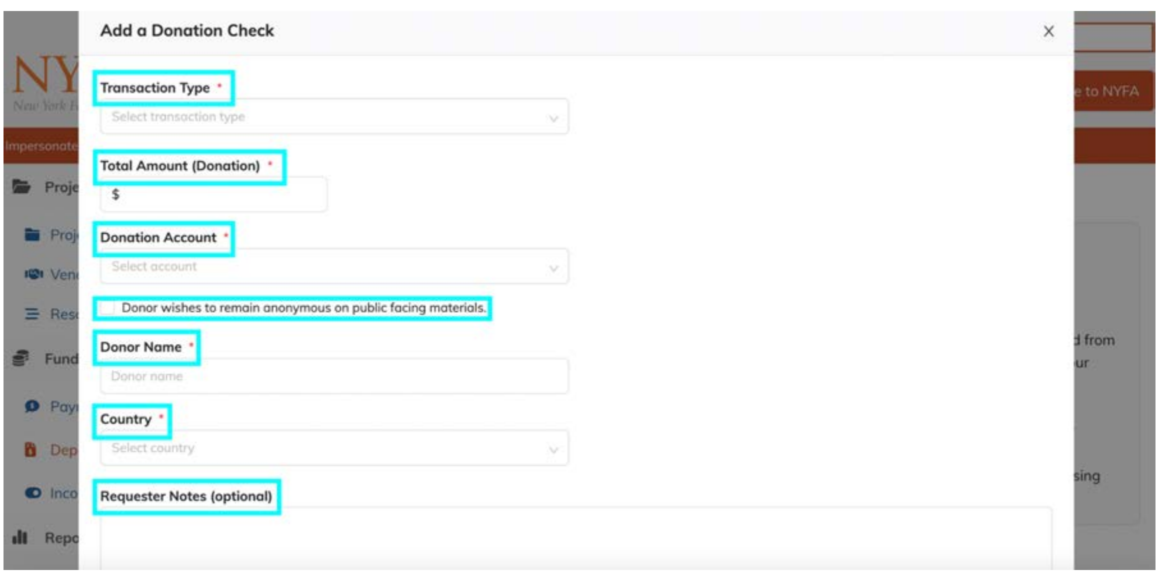


4. Select **Add of Check** from the pulldown menu Artist Projects will see one of two options - Donation or Mixed Income (Emerging Organizations have a third option for earned income). Select the one that applies to your deposit.

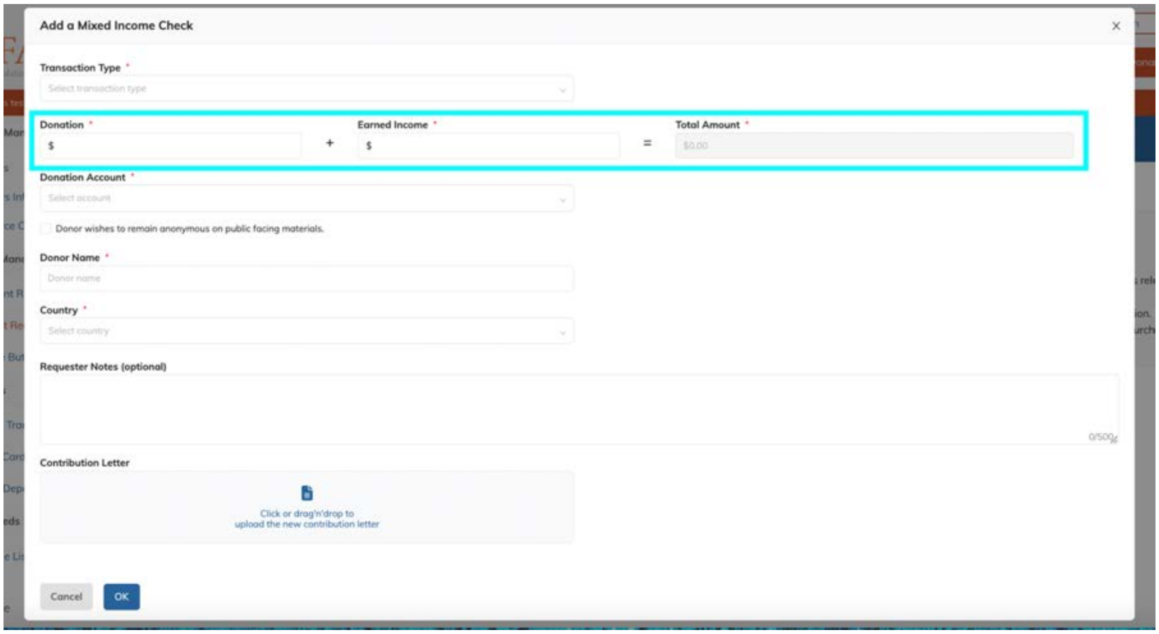


A new window will appear for you to fill in the required information -

Transaction Type - Select 'check' (NYFA Finance staff receives wires and stock donations directly.)
Total Amount
Donation Account - Select if this will be an individual, corporation, or foundation.
Donor Name - select the box if your donor wishes to remain anonymous on public facing materials.
Country - will open up additional address details based upon



If the check is Mixed Income it will also ask for a split between donation and earned income amounts.

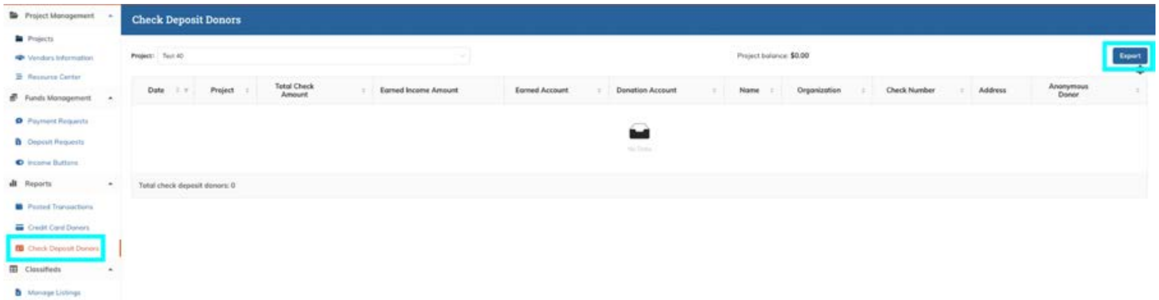


5. **For all donations over $2,500, a donation letter MUST be included. Donations above $2,500 without letters will not be processed until a letter is received.** A template of this letter can be found on the Resource Center.

6. If after you submit you need to make changes you are allowed to edit again by clicking the three dots and selecting the **Edit** icon to the right of the submission.

7. You will then need to mail or drop off your check to NYFA. Once the check is received, it will be 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 when the deposit is complete.

8. For donations over $250 your donor will also receive a formal acknowledgement letter from NYFA for use with their taxes. These letters are sent once a month for the previous month's transactions (for example: donations made in January donors receive an acknowledgement letter in February). You can track donations received via checks, wires and stocks through the **Check Deposit Donations** menu. Select **Export** in the upper right corner.



[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.*

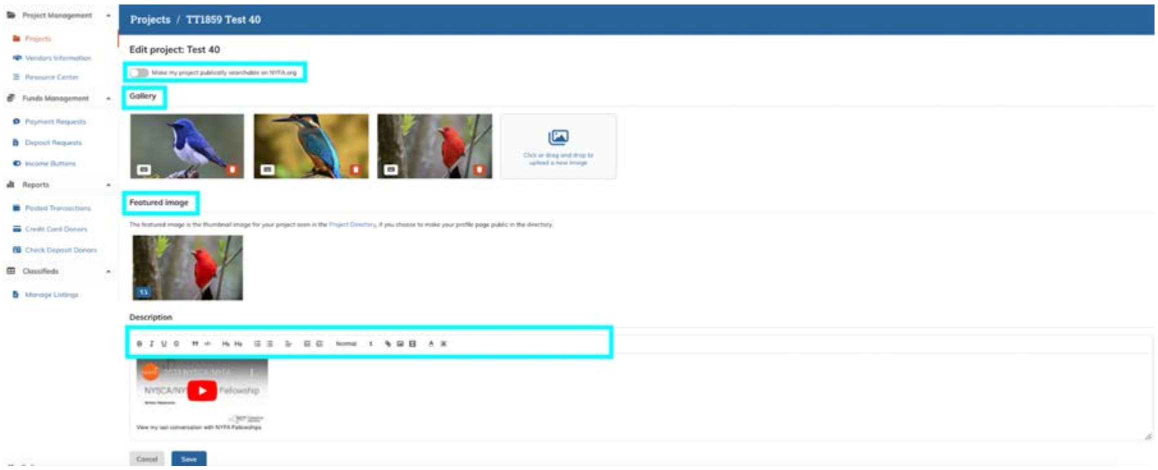
2. From here you can navigate and manage your Fiscal Sponsorship account. Click the **Projects** on the left side from the list below Project Management and then on **Edit Project** from the right side.

3. Click **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". You will be prompted to add information about your image for screen readers.

   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. Click or draft to upload your image on the right side.

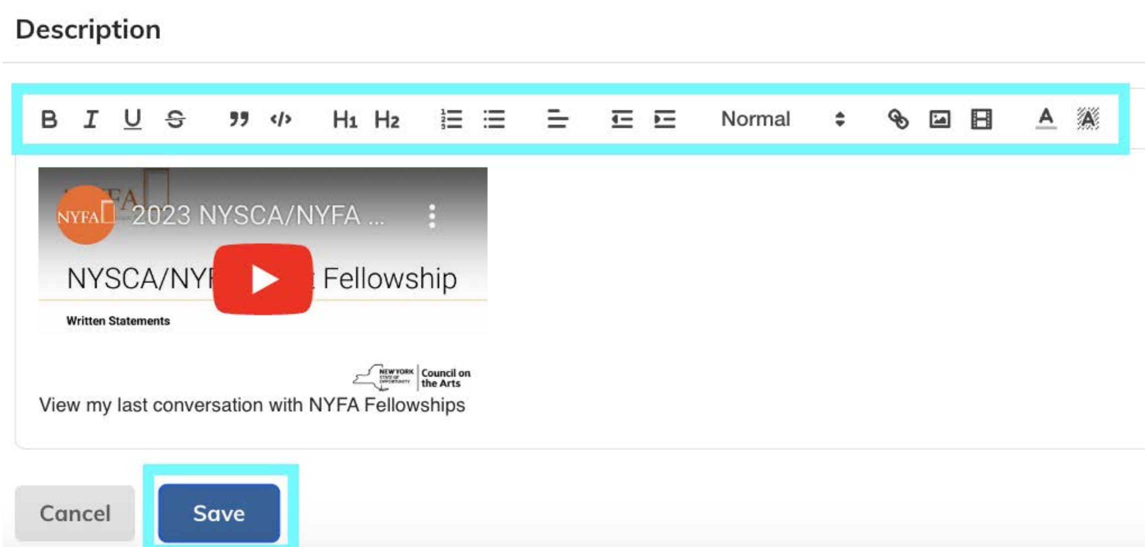
   Select a **Featured Image** to be the thumbnail that appears in the Project Directory.

   Edit text, add additional images and videos in the **Description** section.



Add language content to your project description by clicking in the text box. The Project Name 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.*

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.



*Images should be no larger than **2MB**.*

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 it 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 select your project name from the Project menu.

[END OF ARTIST PROJECT PAGE]

Income Buttons

Income Buttons for Emerging Organizations (EOs) are slightly different from the features available to Artist Projects (APs). These differences will be noted throughout the instructions.

Definitions

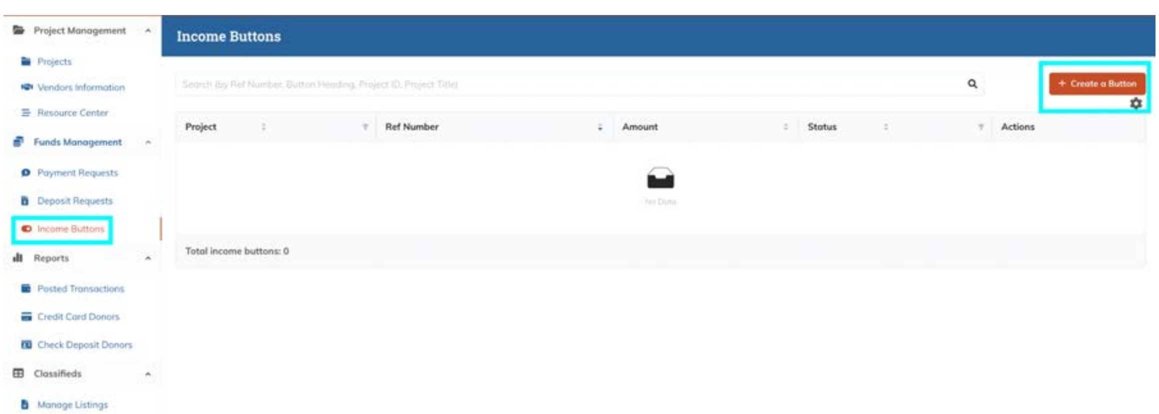
Donated Income – Is a straight donation, which means no goods or services are given in exchange for the contribution. Donated income is tax deductible to the fullest extent of the law through a 501c3 organization, such as NYFA. ONLY straight donations should be processed through a donation button. This includes the orange donate button on your project profile.

Earned Income – Is money received in exchange for a good or service. Earned income is not eligible for a tax deduction. Artwork such as prints or special event ticket sales are examples of earned income. *Only EOs can process earned income transactions through NYFA Fiscal Sponsorship. NYFA does not oversee earned income for APs.*

Mixed Income – Is a mix of donated and earned income and only the value of the donation portion is tax deductible. Mixed income is common when a fundraising campaign offers a small thank-you gift to donors or is selling tickets to a benefit. For example, if a contribution of $100 is made and the donor receives a mug with a $15 fair market value as a thank you, the donated portion is $85. *When an AP creates a mixed income button, earned income generated through that button will be released as a check to the project director after funds have been reconciled. NYFA cannot hold earned income funds for APs.*

Instructions

1. To create a new Income Button select "Income Buttons" from the left hand menu of your dashboard and the "+ Create New Button" on the top right.



2. If you have more than one sponsored project currently enrolled in the program, select the appropriate project title. Complete the form as required:

Button Heading – text that will appear on the button itself

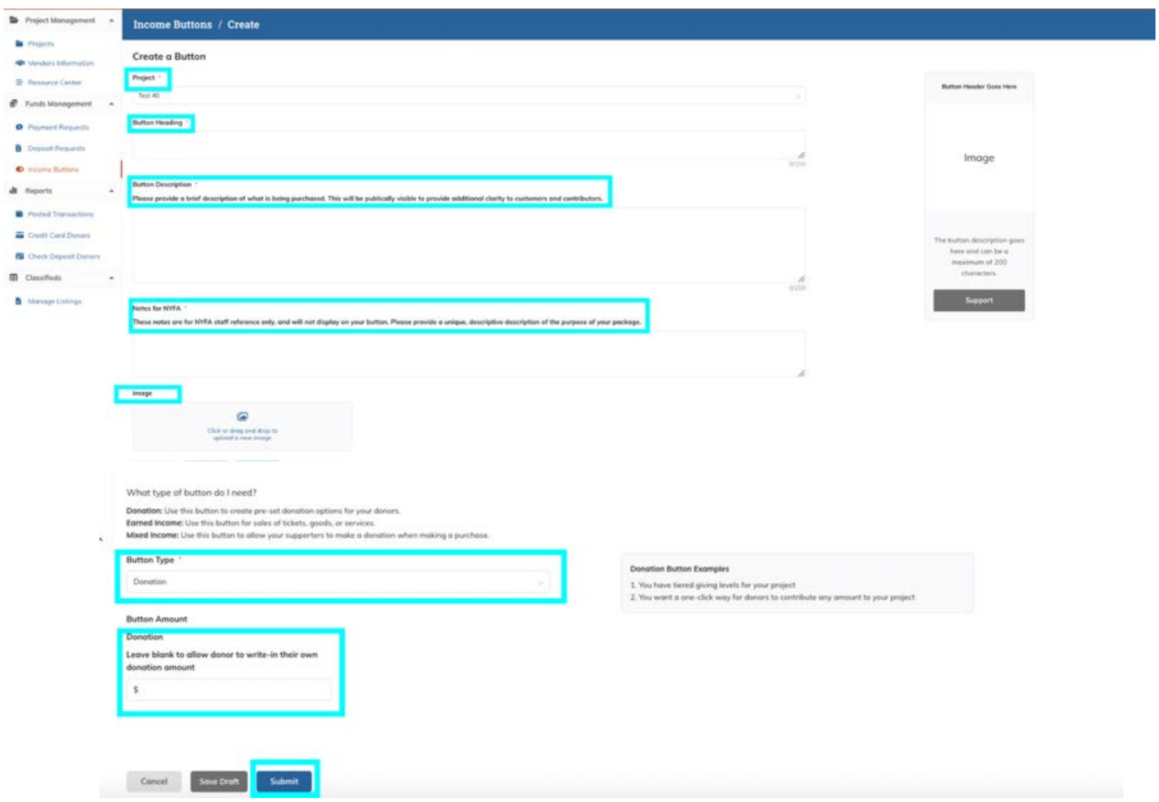
Button Description – this text will appear at the top of the new page that opens after a donor clicks the button.

Notes for NYFA – describe to NYFA staff why you need this button for your fundraising activities. Text entered here is not visible to the public.

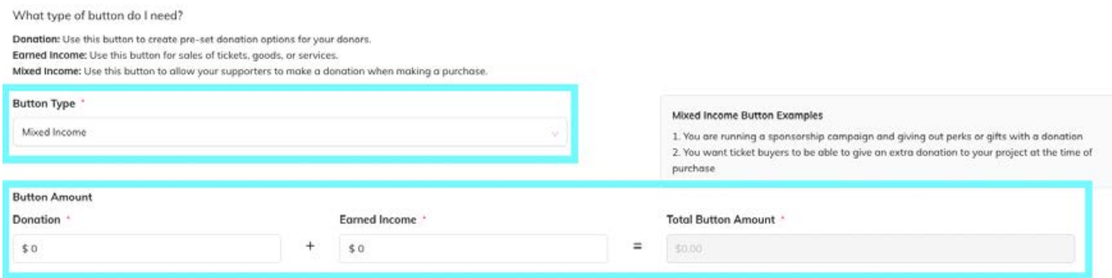
Add an Image (optional) **-** must be 300px x 300px exactly if you use this feature. The image may not upload if the dimensions differ. You can crop to this exact size using photoshop or any image editing software including preview or gimp.

Button Type – Donation or Mixed Income or Earned Income

Select if you want your button to be for donated income or mixed income. *Only EOs are given the option to select earned income.*



4. If you select Mixed Income, additional form fields will appear. You must be as accurate as possible when estimating the earned income portion of any mixed income transactions. The earned income portion should measure the fair market value of that good or experience. The system will round transactions up to the nearest dollar. Select "Save Draft" to save your button or "Submit" to submit it for approval by Fiscal Sponsorship staff.



5. Once submitted or saved, the button will appear as a line item on your Income Button list. If you wish to view your button or edit a draft version, select the three dots under the “Action” column.

NYFA staff must approve all Income Buttons. The button status will change according to the approval process. You will be notified via email of an “Approved” button. Please allow up to 2 business days for this approval.

Button Status Options:

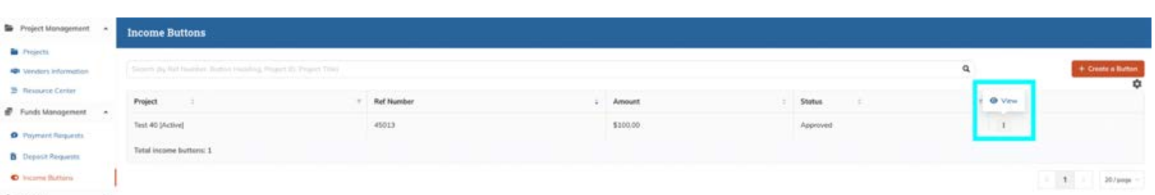
Draft – you have created a button and can edit it until ready to submit.

Submitted – you have submitted your button for review. It cannot be edited once submitted.

Approved – your button has been approved by FS staff and is ready for use.

Action Required – there is an issue with your button. FS staff will contact you if action is required.

6. Once your button has been approved, you will be able to start fundraising through the button. Find your approved button by selecting the three dots under the ‘Action” column and selecting ‘View’.



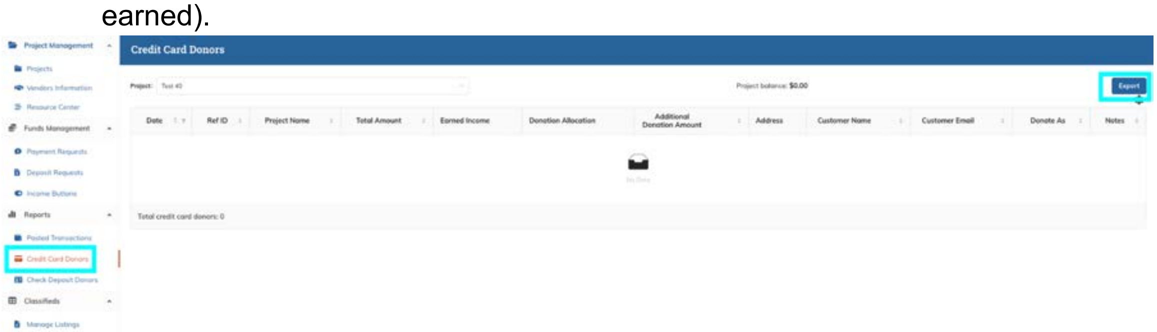
7. You can share your button by:
   - Making it visible on your project profile page.

- Copy the code at the bottom of the screen and paste it into the HTML (Source Code) of your own website.

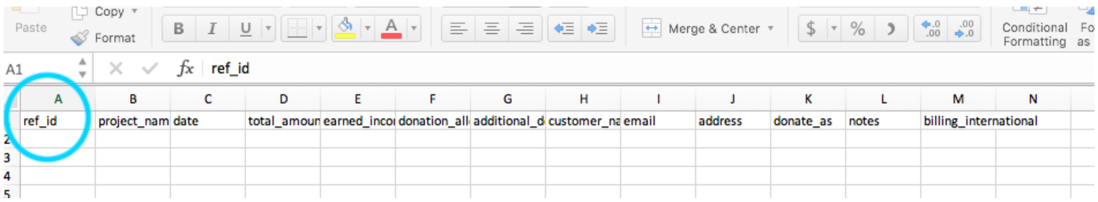
- Copy the URL for your income button and embed this link on your website, social media profile, or in your email.

Tracking Contributions Made Through Income Buttons

Project income collected via credit cards is visible through the ‘Credit Card Donors' menu option. For a detailed list of your button transactions, select the “DOWNLOAD” button below the check or credit card donor options. This document tracks donations made through each of your buttons, donor information and addresses, special requests, such as wishing to be publicly recognized as anonymous, and the type of transaction (donation, mixed or earned).



When you download your Transactions you will see a reference number for each transaction. This is the “Ref ID” and it identifies which button the transaction was connected to, thereby allowing you to track the success of your campaigns and buttons.



You will receive an email from noreply@nyfa.org when donors makes a payment through an Income Button and these funds will be available in your NYFA.org account in approximately one week. These emails will go to the account associated with your NYFA.org log in, and notify NYFA if this address changes.

Individuals will also receive an email receipt for their own records.

For transactions that include a donation over $250, donors will also receive a formal acknowledgement letter from NYFA for use with their taxes. These letters are sent once a month for the previous month’s transactions. For example, for donations made in January donors receive an acknowledgement letter in February.

Email sponsorship@nyfa.org if you have any questions about using the Income Button tool.

[End of Income Buttons]