Welcome to a comprehensive guide to using The CultureTrust Portal, your one-stop-shop for submitting document-type requests! You should have already received an email with your login credentials for the Portal, and if you haven’t, please email your Community Director.

You can access the CultureTrust Portal by opening your favorite web browser, and then heading to:

http://cultureworksfoundry.org/Portal

The CultureTrust Portal is best viewed on a laptop or desktop computer running Windows, Mac, or Linux-based operating systems. While the Portal is also functional via mobile platforms such as smartphones and tablets, it is not designed with that capability in mind, so please bear that in mind as you create and submit requests for the CultureTrust staff to review.
Logging in to the Portal:

By now, you should have received via email your Portal login credentials. If you haven’t, please email your Community Director!

Navigate to the Portal via the link above (or your bookmarks, or however you get to it!). You should be staring at a page that looks something like this:

Please Login

Email

Password

Log in

What's New

Remember me?

Forgot Password

This is the main page of the Portal that you’ll see before you log in. Enter your login credentials and click on the “Log In” button to log in!

Psst! If you’ve forgotten your password, the blue “Forgot Password” link underneath the What’s New button will email you with a link to reset your password. Hurray!

The “What’s New” button will give you information on the latest changes to the Portal, so if things look different or something doesn’t work the way you think it does, log out and give that button a click! It may just have the answers that you’re looking for.
The Interface:

Upon logging in, you should be viewing a screen that looks something like this:

This is your Dashboard, and is your one-stop-shop for everything Portal-related. Let’s take a closer look at the top bar:

The “Home” button in the top bar will always bring you back to the Dashboard. If you get lost, somewhere in the recesses of the Portal, know that you can always get back to somewhere familiar with this button!

The “Project” button opens a dropdown menu with two options:

- Select Project is where you would head to select your project if you happen to be one of those Project Directors with multiple fiscally sponsored projects with CultureTrust.
- Edit Departments are where you can suggest new Departments to be added, to better track your project’s restricted funds.
○ Please note that new Departments are added on a case-by-case basis, and limited to tracking specific types of restricted funding.

Don’t worry! We’ll define what exactly Departments are and how they relate to our accounting software and processes in the Document Requests section.

The next section is Search Filters. You can toggle the section between open and closed by clicking the gray “v” button to the left of the section’s name. Here’s what it looks like open:

![Search Filters Section](image)

Changing options in this section affects how entries display in the sections below. For example, if you were looking for a submission you made in March, but didn’t know the date, you could enter the date range for March of whatever year you were looking in, and only entries from that time period would show.

You can also filter by whether a submission is “Active” or “Archived,” or completed submissions that have been flagged as “archived” by you pressing a button and making it go away.

The next section is by far the most important-- the **Document Requests** section. It’s the only section in which you’ll be doing anything.
**Document Requests:**

**This section is where you’ll be doing all your work in the Portal.** In order to create a new submission, make sure that the section is open via the gray “^” button to the right of where it says “Document Requests,” and then click “New.”

There are other buttons here too! You can “Edit” submissions you’ve already made, or open a read-only version of them via the “View” button. You can copy submissions by selecting them and then pressing the “Copy” button, or delete un-submitted ones via the “Delete” button. Finally, you can review submissions your admin may have submitted for your approval via the “Review” button.

In order to use any of the buttons other than “New,” you always need to click on submissions to select them, and then click the button corresponding to the action that you wish to perform.

Once you’ve clicked on the “New” button, you’ll find yourself at a screen that looks like this:

**New Document Request**

Copyright © 2019 - CultureWorks Greater Philadelphia
You’ll need to select what type of Document Request that you’d like to submit. Here’s a brief overview of the different types of Document Requests, and what they’re used for:

- **Contract**: You’ll use this type of request to submit any sort of document that requires a signature, including but not limited to grant agreements, agreements with contractors, quotes, scope-of-works-- that sort of thing.

- **Grant Proposal**: Use this type of request to submit any outstanding grant proposals that you’re working on, for your Community Director to review and approve.

- **Certificate of Insurance (COI)**: This type of request asks that we generate a document listing some additional party (or parties) as covered under the general liability insurance policy coverage that your project has as a facet of being fiscally sponsored by CultureTrust.

- **Financial Report**: Defunct! You can ignore this one.

- **Marketing/Fundraising Campaign**: This is where you’d submit your marketing and/or fundraising campaign information for review by your Community Director before releasing it to the world.

- **Payroll**: This is where you submit your payroll timesheets every month!

- **PEX Card**: This is where you submit your PEX Card Initial and Deposit request forms, to request new PEX Cards or deposit funds onto existing ones

- **Project-To-Project Transfer**: This is where you’d submit a request for a transfer from your project to another project that’s fiscally sponsored by CultureTrust.

To proceed, simply select the sort of submission that you’d like to make via the buttons to the left of the name of each type of request, and the fields you’ll need to fill out will magically appear below!

Next, we’ll go through the different steps of filling out each of these types of submissions in turn!
Contracts:

Current Status: This will always be automatically filled in, and shows the status of the submission whether you’re creating a new one or viewing/editing/copying one that’s already been created.

Description: Here, enter a short description of the contract.

Dates: Here, enter the starting and ending dates for your contract.

Contract for: Here, select whether or not the contract is an agreement where your project will receive or pay funds. If neither, just select one and continue, noting it in the description above.

Other Party: Here, select whether you are interacting with an individual person or with an organization, such as a company or foundation.

After making your selection, a dropdown menu will appear and ask you to select a specific Entity or Person from a list of Entity/Persons associated with your project:

Please note, if the Entity or Person does not show up in this list, you must click on the gray “New” button to the right of the dropdown menu that appeared, and then follow these steps. If not, skip to the “Details on Schedule and Deliverables” section further below:
Adding a Person/Entity via the “New” Button within a Request:

Clicking the “New” button saves the submission that currently being worked on and brings you to a page that looks like the image below.

On the right side, you should first search whether or not the Person/Entity has already been added into the database-- if they have, upon searching their name will be displayed in the right-hand column after searching.

You can move forward and associate them with your project by clicking on their name to select it, and then clicking the “<Add” button. Doing so allows them to show up in the dropdown menu.

If they haven’t been added into the database already (that is to say, if they didn’t show up after searching in the right-hand column), you can click the “New” button in the center column to add them. You don’t need to worry about the Person/Entity role-- the system automatically picks that for you from the context of the submission from which you entered this screen!

If you’ve clicked the “New” button and filled out their information, click “Save” at the bottom of the screen. After doing so, typing their name on the right side of the Add New Person/Entity screen (in the box underneath “All Other Persons”) will reveal their name. From there, click the “<Add” button to associate them with your project, and then click “Done” to return to your submission.
Details on Schedule and Deliverables: Here, you’ll want to enter the details on frequency of payments and what you or the Other Party are required to deliver as per the terms of the contract.

COI Required?: This question asks whether or not the contract stipulates that a Certificate of Insurance is required, and communicates to our team to generate the certificate.

Supporting Docs: Here is where you’ll attach the contract document, as well as any other supporting documentation you may have. To do so, simply click the gray “Add” button to the right of the Supporting Docs box. This pops up the familiar file-choosing dialogue box, similar to attaching files to your email. Select the file you want, and then click “Open” to add it to the submission.

Delivery Instructions: Selecting the checkbox marked “Rush” indicates that you’d like the contract to be expedited, and processed outside of our normal weekly processing schedule. Doing so indicates that CultureWorks will charge your project a $50 rush fee.

Documents signed by Other Party?: This section asks if the contract has already been signed by the Other Party. Except in rare circumstances, we require that the Other Party sign the contract before we review and execute the contract.

Note-- we legally cannot sign any contracts that don’t have your project listed as “<Your Project> of CultureTrust Greater Philadelphia,” or that do not have a signature line for the CultureTrust President. You will need to mark these two checkboxes to verify that the contract
is in this format, otherwise your submission will be returned to you for edits. If for some reason those two stipulations are not possible, a space is provided for you to explain your reasoning.

Finally, we have the Notes section, where you can add any additional notes you have about the document or for our staff.

Once you’ve filled out all the fields and attached your documents, you’re ready to submit your contract for execution! Scroll all the way to the bottom of the screen, and click the “Submit” button.

**Note**-- if you have not filled out all of the required fields, *you will not be able to submit*. The page may refresh without any indication that anything has happened. If this occurs, *scroll up*-- it’s likely that you have neglected to fill out a required field. Any such fields will have red text next to them indicating what needs to be filled out.
Grant Proposals:

This option, like all the other options, has the Description and Current Status fields at the top, and the Supporting Docs and Notes fields at the bottom.

Please verify that

☐ Narrative Included
☐ Budget Included

Reason: Please explain why you have not checked both boxes.

You’ll just need to make sure that you attach your narrative and your budget in the Supporting Docs section. If one of them is missing, you’ll just need to explain why not in the Reason box, and then click “Submit” at the bottom.

Certificate of Insurance (COIs):

This option, like all the other options, has the Description and Current Status fields at the top, and the Supporting Docs and Notes fields at the bottom.

Event Date(s)
Event Time(s)
Name of Insured Entity
Address of Insured Entity

Here, you’ll want to enter both the Event Date(s) and Event Time(s). You’ll also want to enter both the Name and Address of Insured Entity. In other words, you need to enter the name and address of the Person/Entity that requested to be listed as additionally insured on your project’s General Liability Insurance coverage that they have through being fiscally sponsored by CultureTrust.
Note-- Certificate of Insurance-type Document Requests do not require that supporting documentation be attached. All that we need to process the request is the information highlighted above.

Marketing/Fundraising Campaign Information:

This option, like all the other options, has the Description and Current Status fields at the top, and the Supporting Docs and Notes fields at the bottom.

Please verify that □ This Campaign contains required mention of CultureTrust

Reason Please explain why you have not checked this box.

You’ll just need to make sure that your project’s campaign contains the required mention of CultureTrust Greater Philadelphia as stipulated in your fiscal sponsorship agreement. If not, simply supply a reason in the box provided and click “Submit” at the bottom of the page.
**Payroll:**

This option, like all the other options, has the **Description** and **Current Status** fields at the top, and the **Supporting Docs** and **Notes** fields at the bottom.

**Pay Periods:** Here, you’ll want to enter the pay period for which you are submitting timesheets. This will generally be the current month.

It’s helpful if you submit all your payroll timesheets in one submission, with one PDF-format document attached in the **Supporting Docs** section. You can find our timesheet template available on the **Toolkit page of our website**, along with this guide and many others!

The next section, “Employee,” asks you to select an employee from a dropdown menu, then enter their hourly rate, their total hours paid for the time period, and any notes. You can add more lines for employees by clicking the dark gray “Add” button at the end of the row.

**Note**-- If an employee you wish to pay does not appear in the dropdown menu, you will need to add them to the database and associate them with your project. Click the gray “New” button to the right of the Employee field (on top of the table, where it says “(see splits)”). Follow the same process as in page 7 above to add a new person to the database and associate them with your project. This will get them to show up in the dropdown menu.

Once you’ve entered all your payroll hours, please attach a .PDF file of your timesheet to the **Supporting Docs** section and then click “Submit” to submit your payroll for approval!
PEX Card:

This option, like all the other options, has the Description and Current Status fields at the top, and the Supporting Docs and Notes fields at the bottom.

Type of Card: Here, select whether you are requesting a new PEX Card or whether you are depositing funds onto the card you have.

Date needed: This is where you’ll input when you need the funds added to the card by.

Number of Cards: This will always be “1.” You’ll submit separate PEX Card-type submissions if you are filling multiple cards.

Cash Value of Card: This is where you enter the amount that you’d like deposited on your card.

Person named on Card: Here, select the person who’s name is on the card. Like in the Payroll and Contract entries, there is a gray “New” button here, so that you can add new entries into the system if they don’t appear in the dropdown list.

Department: This field allows you to categorize which section of your business you’d like the funds to come from, and directly corresponds to the Department dimension in Sage/Intacct.

After filling out all those fields, you can add the appropriate PEX Card form for your submission to the Supporting Docs section, and then submit your entry for approval!

Please also note that you can request that this submission be Rush’d for a fee-- any items submitted without a “Rush” will be processed according to our normal processing schedule.
**Project-to-Project Transfer:**

This option, like all the other options, has the **Description** and **Current Status** fields at the top, and the **Supporting Docs** and **Notes** fields at the bottom. Please make sure to use the **Description** field to explicitly state for what reason you would like to transfer funds to another CultureTrust project.

**Date of Invoice**: Here, you’ll enter the date that you’d like the transfer to hit the books.

**Invoice Number**: This is where you’ll enter the invoice number for the project-to-project transfer. This could be from an invoice you created, or one that your sister project sent to you. If you do not have one and the system does not let you continue with it blank, just repeat the date.

**Dollar Amount**: Here’s where you’ll enter the full dollar amount that you’d like to transfer to your sister project.

**Destination Project**: This field is where you’ll enter the name of the CultureTrust project to which you’d like to transfer funds.

**Department**: Like in the **PEX Card** type submission above, this is where you can pick the Sage/Intacct Department category into which you’d like this submission to be classified.

Before submitting, you’ll add a completed Project-to-Project transfer form to the **Supporting Docs** section and also check whether or not you’d like to have the submission expedited for a fee. You can find a template for the Project-to-Project transfer form on the **Toolkit**.