Viewing and Managing Your Grants

1. Log into DonorView.

2. Select **DonorView** in the navigation bar at the top of the screen, scroll down and select **Grant History**.

3. Under Search Grants, you will see options to select your desired date range, or you can select "Before" and enter today's date to see all past grants. Select **Advanced Search** to search by part of or all of an organization’s name, or by status of the grant.
4. Based on the search criteria, the Grant History will generate. Results can be exported to Excel.

**Status Definitions**
- **Entered** – Grants be edited or cancelled. See #5 below for more information.
- **Approved Status** – First internal approval.
- **Posted Status** – Final approval status.
- **Hold** – Question on grant or due diligence is required for the organization.
- **Rejected** – Grant request denied. You will receive follow-up communication.

**Other Definitions**
- **Effective Date** – Date check is issued (printed and ready to mail).
- **Cleared Date** – Check has been cashed by grantee. Data will be populated at the beginning of each month.

<table>
<thead>
<tr>
<th>Organization</th>
<th>Amount</th>
<th>Status</th>
<th>Created</th>
<th>Scheduled to Be Paid</th>
<th>Effective</th>
<th>Cleared</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>City of Saint Paul, Department of Economic Security</td>
<td>$10,000.00</td>
<td>Hold</td>
<td>6/2/2022</td>
<td>6/2/2022</td>
<td></td>
<td></td>
<td>Details</td>
</tr>
<tr>
<td>Minnesota Public Radio</td>
<td>$10,000.00</td>
<td>Approved</td>
<td>5/26/2022</td>
<td>6/2/2022</td>
<td></td>
<td></td>
<td>Details</td>
</tr>
<tr>
<td>Every Meal</td>
<td>$2,500.00</td>
<td>Entered</td>
<td>5/25/2022</td>
<td>6/30/2022</td>
<td></td>
<td></td>
<td>Details</td>
</tr>
<tr>
<td>Animal Humane Society</td>
<td>$5,000.00</td>
<td>Posted</td>
<td>5/25/2022</td>
<td>5/25/2022</td>
<td></td>
<td></td>
<td>Details</td>
</tr>
</tbody>
</table>

*Export to Excel*
5. Select **Details** to view more information on a submitted grant recommendation. If a grant is still in the initial **Entered** status, this screen will let you edit details of the grant recommendation or cancel it altogether.
   - Please note that grants cannot be edited or canceled through DonorView after they have proceeded past the Entered status. If you would like to make adjustments at a later point in the process, please contact your relationship manager.

6. Select **Repeat** to easily recommend a new grant to the same organization listed in your Grant History.
   - When repeating a grant, the system will copy over the same dollar amount, purpose, and special instructions that were entered in before. Be sure to review and update this information as needed before submitting.