MyInnovia Login and Helpful Instructions for Donor Advised Funds

To Login to MyInnovia

Please use the username and temporary password we provided for your initial login. Once you are logged in for the first time, the program will prompt you to establish a new personal password. Thereafter, to ensure the protection and confidentiality of your fund information, you will be required to use your username and the new password you created to gain access to MyInnovia.

Initial Login Process

STEP 1 Accessing MyInnovia

Go to the Innovia website and click login in the upper right corner and enter through the blue "Donor" portal. Or use this link https://innovia.iphiview.com/innovia/ to go directly to the new login page.

Follow the link to MyInnovia.

STEP 2 Enter username and temporary password in the appropriate fields. Click the Login Button.

STEP 3 After you are logged in, you will be prompted to enter important information for your personal profile to maintain secure access to all your fund information

- Establish a personalized security question
- Confirm or provide an email address
- Provide date of birth – to ensure another level of security.

STEP 4 You will also be prompted to change your personal password for all future logins to ensure that only you will know the password.

IMPORTANT NOTE: Please record your username and newly selected password for all subsequent logins. Your username is your email address (e.g. johndoe@gmail.com). If you forget your username, please call our office at 509-624-2606. If you forget your password, use the Forgot Password link below the login module.

Once you complete the login process, you will be brought to the Fund Dashboard – which will display basic information concerning your fund.

To Access Fund Information

STEP 1 Confirm the name of your fund. If you are connected to more than one charitable fund at Innovia Foundation, please use the drop-down arrow to the right of your Fund Name to select another fund.

STEP 2 Use the navigation menu on the Dashboard to navigate to other pages in MyInnovia to:

- Access your fund's activity
- Recommend a new grant (only accessible to donor-advisors with donor-advised funds)
- Contact us with any questions and/or feedback
- Make an online gift to your fund
- Maintain personal information and MyInnovia security
- And more!

Fund Activity

Use this page to get up-to-date information about fund activity. Things to see:

- Fund Balance
- Statement of Account Summary
- Contribution Activity (see it online, or download it as an Excel document or PDF)
- Recent Giving History (see it online, or download it as an Excel document or PDF)

Recommend a Grant

If you are a donor-advisor, use the following steps to recommend a new grant from your fund.

STEP 1

A. Confirm you have chosen your donor-advised fund from the drop-down menu.

B. Choose the nonprofit organization you wish to support – click the "New Grant" button next to the Grantee Name.

NOTE: To start, you will have to build a list of your favorite nonprofit organizations. Click the "Add a Grantee" button and conduct a search of our database.

If your search does not yield the nonprofit organization you are looking for, you may suggest a grantee.

STEP 2 Complete the Grant Recommendation Form

STEP 3 Submit Grant Recommendation

STEP 4 Final confirmation. You will also receive a confirmation email for each recommendation, which will include a special transaction ID for future tracking.

Additional features:

Recurring Grant: On the Grant Recommendation form, you may select a single payment (default) or Recurring Payments to set up a schedule of payments to the same Grantee.

- Select payment amount, frequency (monthly, annually, etc.), start and end dates.

Grant Cart: If you would like to recommend grants to multiple organizations at once, click "Add to Cart" to enter grant recommendations as a group, rather than individually.

- Once you have added the grantee payments to your cart, select Save Changes and Go to Cart.
- Review your cart, confirm payment details and select Check Out.
- On the Confirmation page, you will see a list of Transaction IDs to be used to track your payments.

Add to Your Fund

This feature provides an opportunity to make a donation via credit card to your own fund.

My Profile

▪ Maintain personal information (name, addresses, phone numbers, email, etc.) to ensure Innovia's records are accurate and up to date.

▪ Change password information and/or secret question.

FREQUENTLY ASKED QUESTIONS (FAQ)

Accessing Your Fund Information

Forgot your username?
Call us at 509-624-2606 and request assistance.

Forgot your password?
Click on the link that says, "Forgot Password." You will be prompted to enter your email address, which must match the email address we have on file. A token to change your password will then be emailed to you. If you have any difficulties, call us at 509-624-2606 and request assistance.

FREQUENTLY ASKED QUESTIONS (FAQ) (Continued)

If I have multiple funds, will I be able to see the details for each fund separately?
Yes! For donors with access to multiple funds, you will see a drop-down menu which allows you to select each fund to view.

Fund Activity

How will I know when my fund statement has been posted online?
If you are set up to receive a notification, you will receive an email notification when the fund statements are posted in MyInnovia.

What does "Available" mean on the Fund Dashboard?
The "Available" calculation is the total grant dollars that can be distributed from a fund. For pass-through funds, this is the total market value minus any outstanding payments, such as grants or fees.

What does "party name" mean when I download contribution activity to Excel?
Party name is the legal contributor which is the entity that signed the check, made the credit card gift or electronic transfer. Sometimes this differs from how the donor wants to be recognized. Please contact us if you are unable to determine the contributor from the "party name."

What does the "Approved" status mean?
The "approved" status signifies that the transaction has been made and approved in the system, but not yet paid.

What does the "Posted" status mean?
The "posted" status signifies that the transaction has been posted on the account and is ready to or has been paid.

What is an "Issued" Date?
The "Issued" date captures when payment is sent (check has been created) to the recipient.

How do I make an online gift?
Donors may use a credit card to make a gift to any fund designated as a Giving Opportunity online through "Give Now."