Account View User Guide

The Methodist Foundation for Arkansas now provides an online service for churches and account holders that provides secure access to information related to your account(s).

If at any time you need assistance using the online portal, please call (501) 664-8632.

Initial Login Process

STEP 1: Gaining Access
Link: **https://mfar.iphiview.com/mfar/LogIn**

STEP 2: Select Forgot Password and enter your email address in the User ID field, enter your phone number and select verification method (Text of Call). Click "Send Verification Code."
Your cell phone must be on file to complete this process.

STEP 3: Enter the verification code sent to your phone and click "Continue". Please note that it may take a few minutes for the call or text to be received.

STEP 4: You will also be prompted to create your personal password for all future logins to ensure that only you will know the password. Click "Login".

IMPORTANT NOTE: Please record your newly created password for all subsequent logins. If you forget your password, use the Forgot Password link below the login module.

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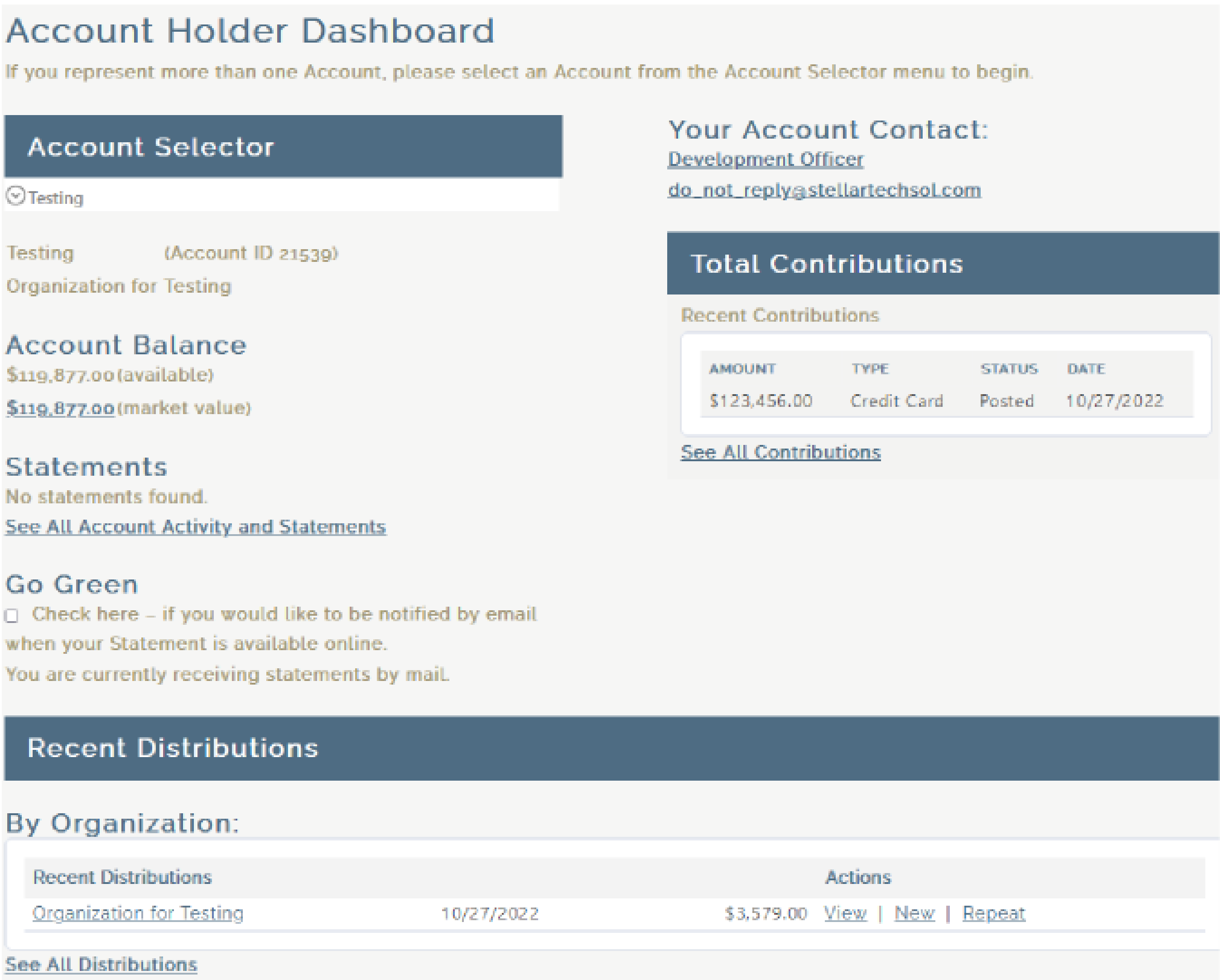
Once you complete the Log In process, you will be brought to the ***Account Holder Dashboard*** – which will display basic information concerning your account including:

- Current Account Balance
- Access to your most recent Statement
- Recent Deposits
- Recent Distributions



To Access Account Information

STEP 1: Confirm the name of your account. If you have access to more than one account you can switch between them by clicking “Change Account” under the Account heading.

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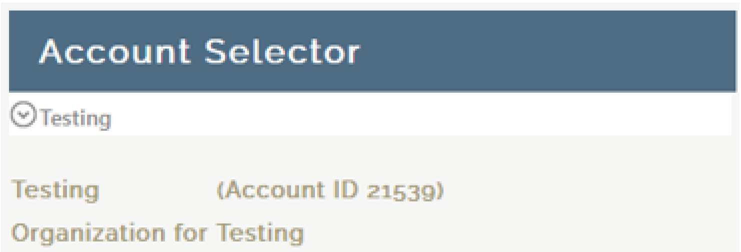
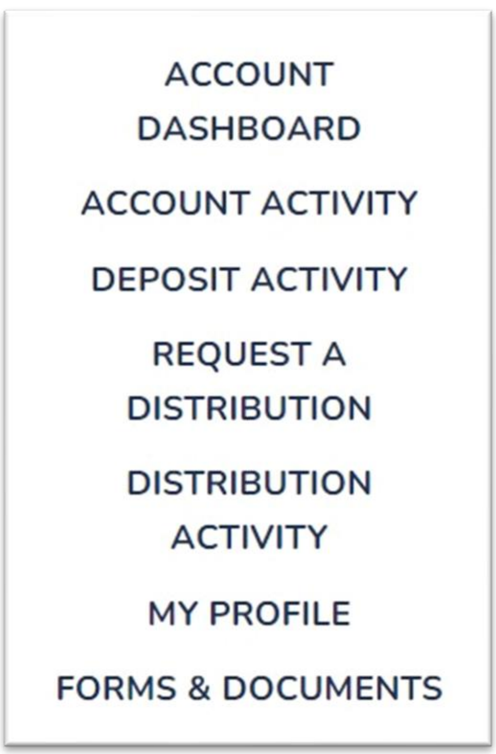


STEP 2: Use the navigation menu at the *top of the screen (Account View)* to navigate to other pages.

- Access your account's activity
- Request a Distribution (for those with Authorized Access)
- Review your account's Distribution and Deposit activity
- Maintain personal information & update your password
- Access forms and documents related to your account



<u>Account Activity</u>

Use this page to view up-to-date information about your account.

- Account Activity Summary per a selected date range. Data includes the following:
  - Beginning and Ending Balances
  - Deposits
  - Distributions
  - Earnings Allocated to the Account
  - Administrative Costs (account service fees)
  - Other Activity (transfers, etc.)

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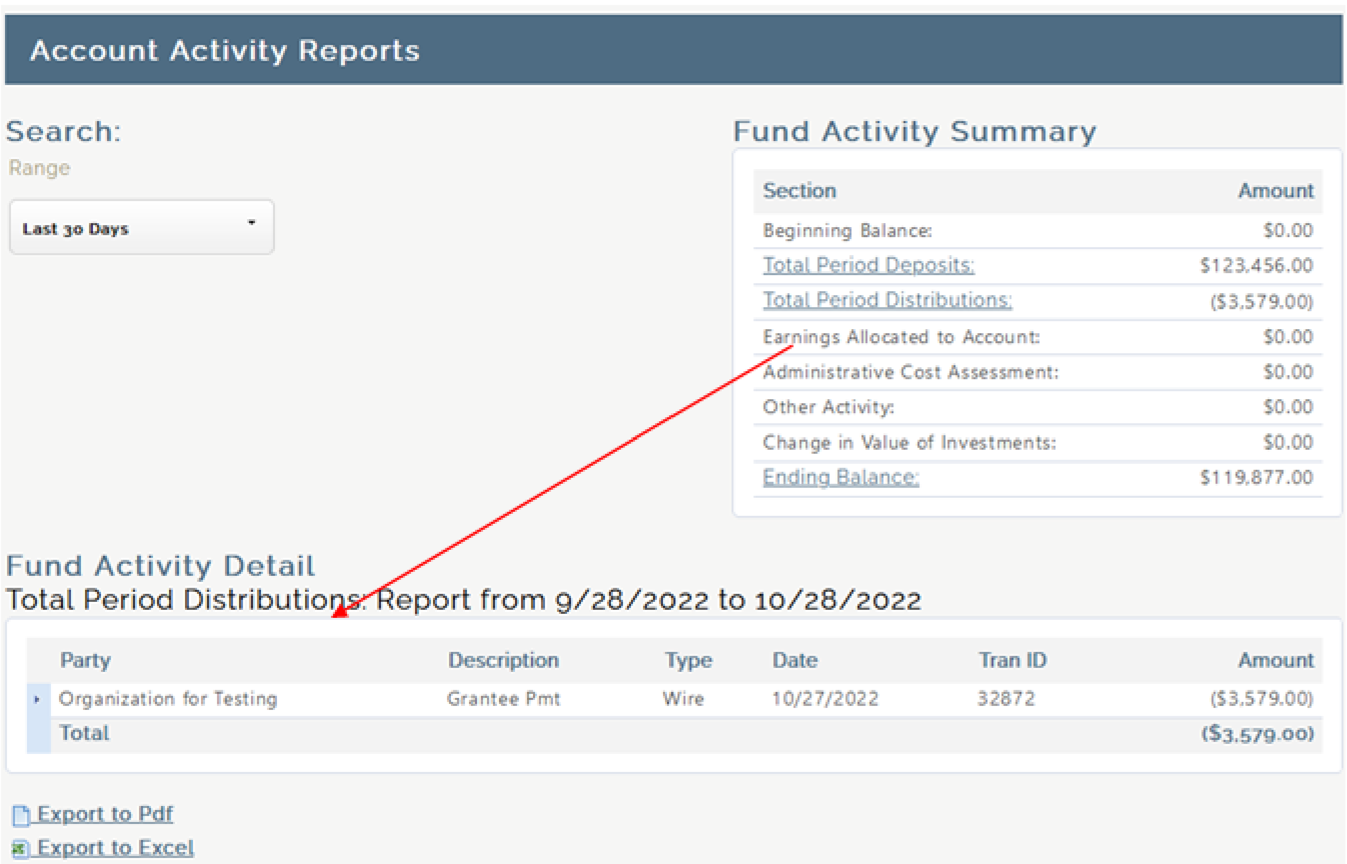
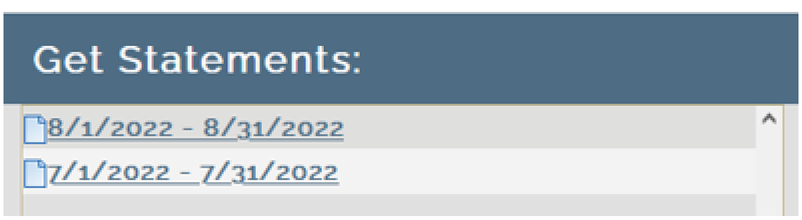
Highlighted items are clickable hyperlinks. Click on any highlighted item to display the detail for that activity in the table below.



On this page you may also download your account statements: Click the date range to open the statement as a PDF.



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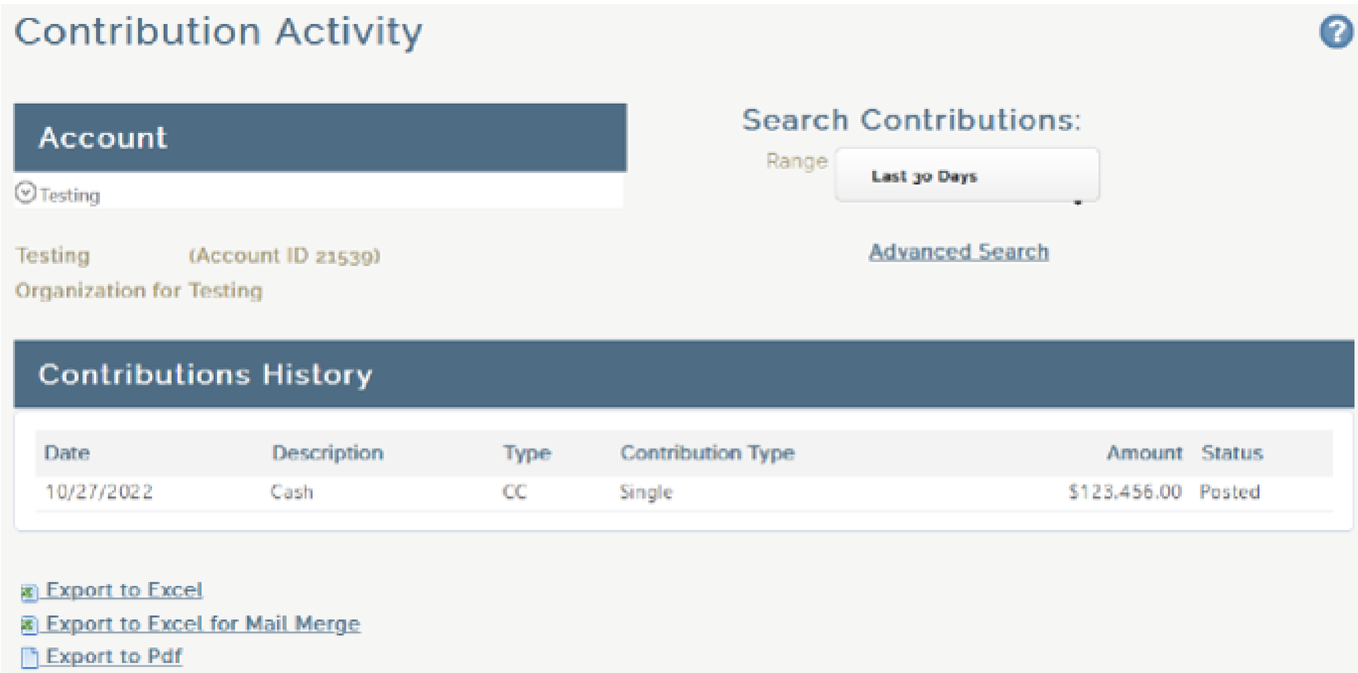
Deposit/Contribution Activity

View your deposit activity per the selected date range. Information displayed includes: donor(s), transaction type, transaction ID, Date, Amount, etc.

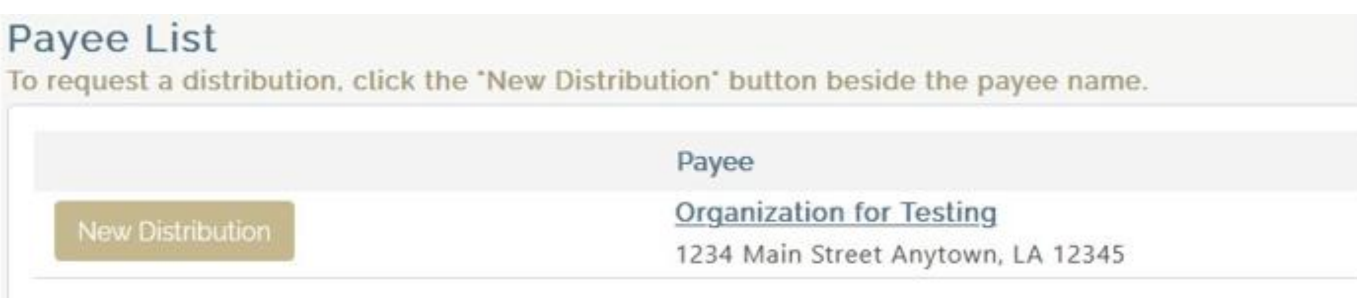


Request a Distribution

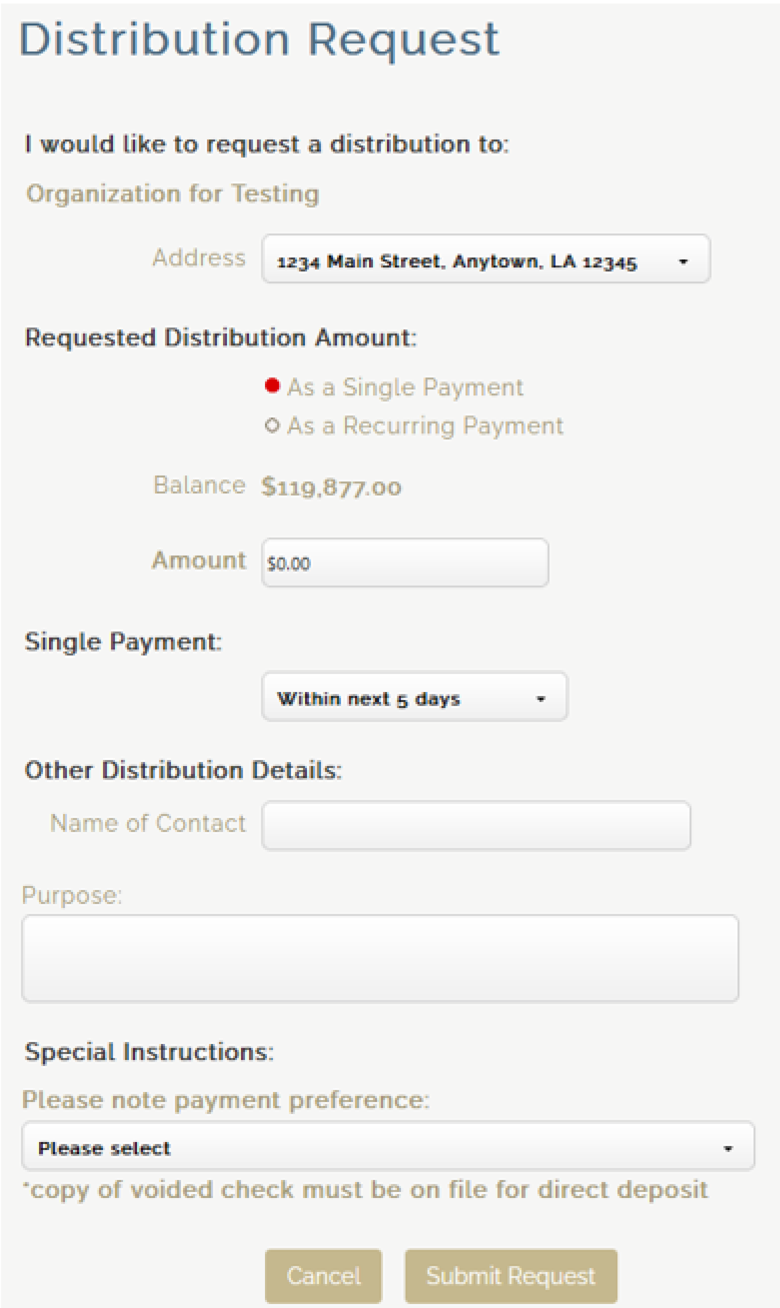
If you are an interested party with authorized access to the account, use the following steps to request a distribution from your account:

STEP 1:

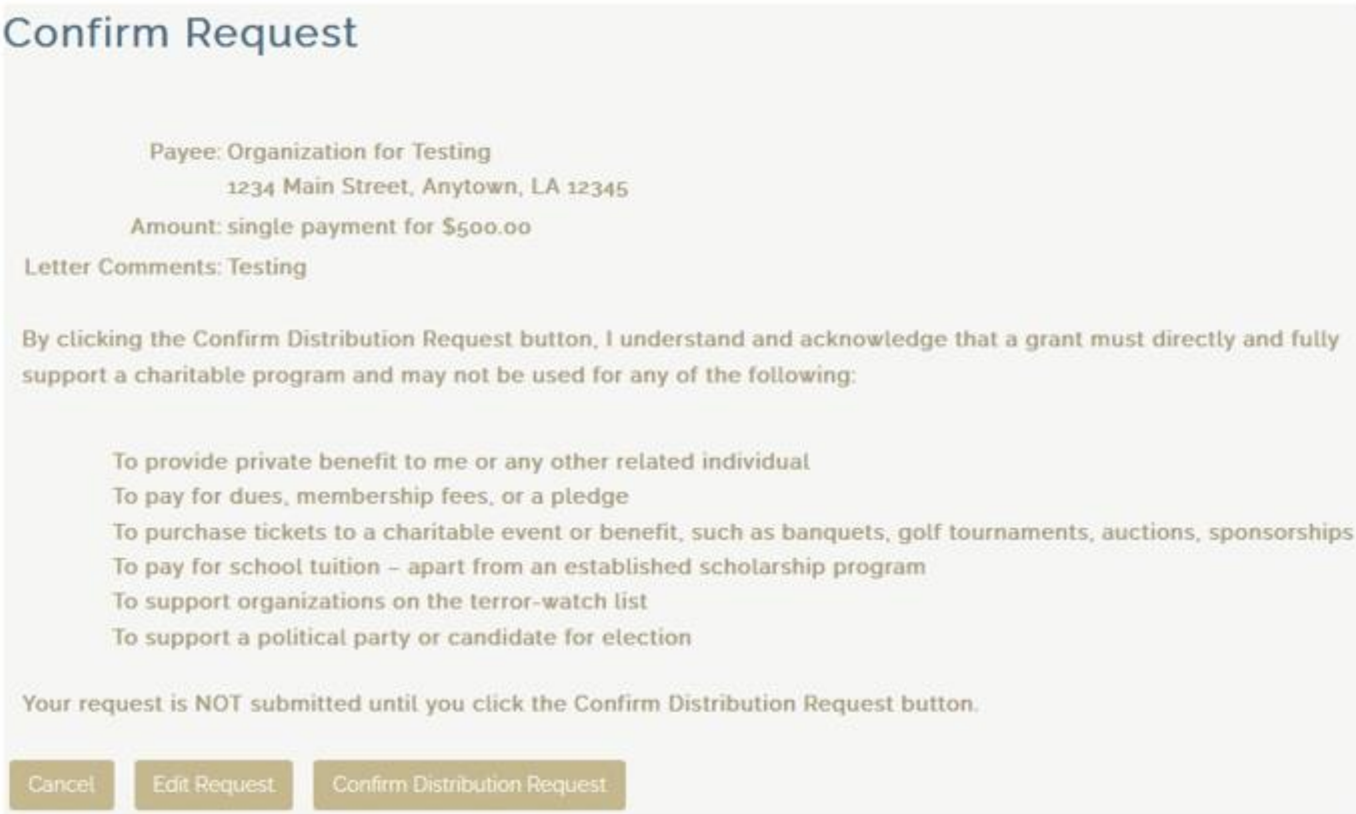
A. If you hold more than one account, confirm you have chosen the correct account from the menu.
B. Choose the payee from your list – click the “New Distribution” button next to the Payee Name.



STEP 2:
Complete the Distribution Request Form – Note that Amount and Purpose are required fields.



STEP 3: Submit Distribution Request and Confirm the request details on the following page.
If changes are needed, select the Edit Distribution button to return to the form and make any corrections.
If all information is correct, choose Confirm Distribution Request.



Confirm Request

Payee: Organization for Testing
1234 Main Street, Anytown, LA 12345

Amount: single payment for $500.00

Letter Comments: Testing

By clicking the Confirm Distribution Request button, I understand and acknowledge that a grant must directly and fully support a charitable program and may not be used for any of the following:

To provide private benefit to me or any other related individual
To pay for dues, membership fees, or a pledge
To purchase tickets to a charitable event or benefit, such as banquets, golf tournaments, auctions, sponsorships
To pay for school tuition – apart from an established scholarship program
To support organizations on the terror-watch list
To support a political party or candidate for election

Your request is NOT submitted until you click the Confirm Distribution Request button.

Cancel | Edit Request | Confirm Distribution Request

STEP 4: Final confirmation screen displays your transaction ID. You will also receive a confirmation email for each request which will include a transaction ID for future tracking.

Distribution Request Submitted

Thank you for your Distribution Request. Your transaction ID is: 10202.

Make Another Distribution Request | Back to Account Holder Dashboard | View Distribution History

<u>Recurring Distribution</u>: On the *Distribution Request* form, you may select a *Single Payment* (default) or *Recurring Payment* to setup a schedule of payments to the same payee.

Select payment amount, frequency (monthly, annually, etc.), start date and number of payments. The End Date will calculate automatically based on the Start Date and number of payments entered.

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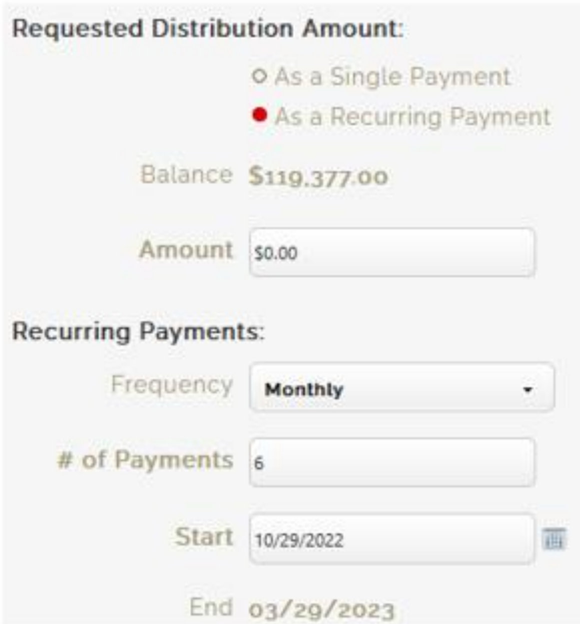
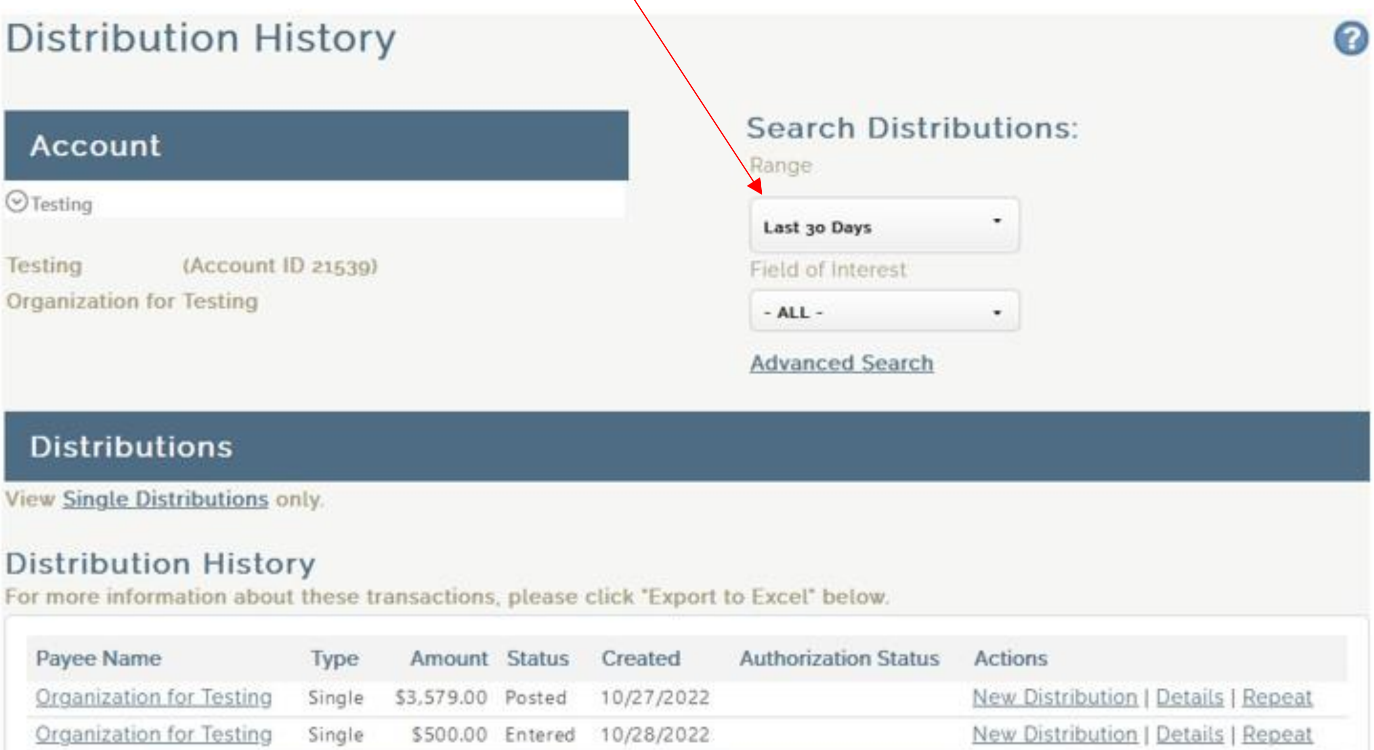


Distribution Activity

Displays all payments within a specified date range.



To view detail about any transaction, select Details under the Actions column.

From this screen you may also cancel the request, or edit the request - transaction status must be: Entered. Once Approved or Posted, these options are no longer shown.

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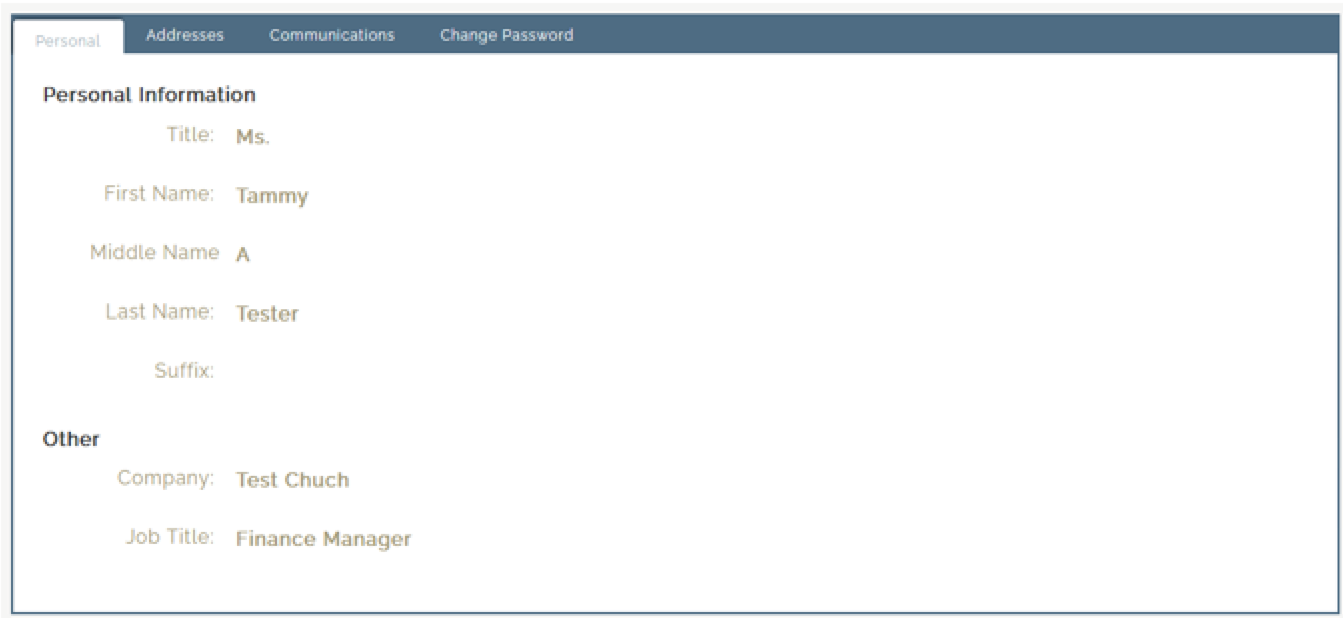
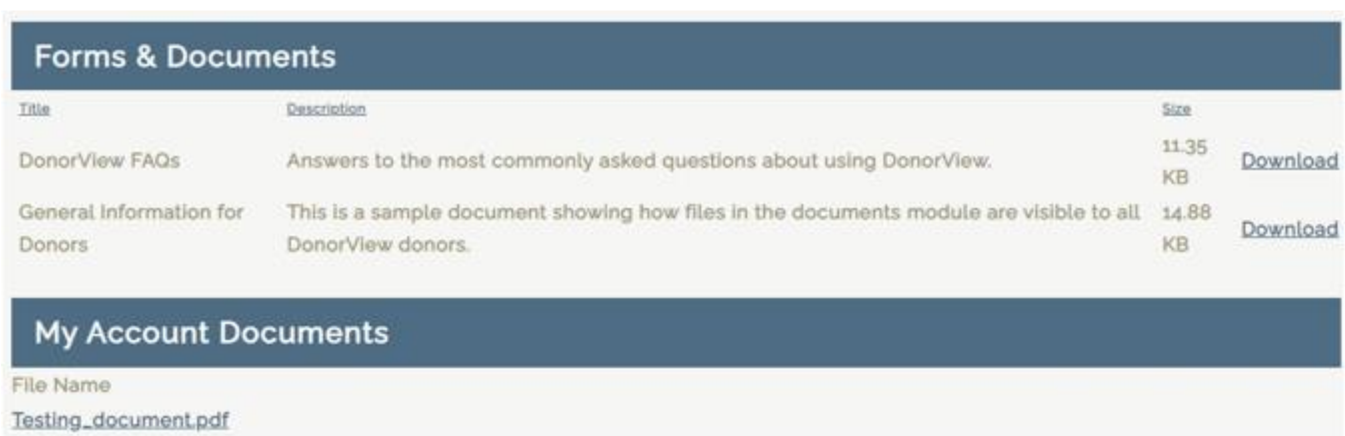
My Profile

- Maintain personal information (name, addresses, phone numbers, email, etc.) to ensure the Foundation's records are current.
- Change password.
- Please save any changes before moving to another page or tab.



Forms and Documents

- Displays general forms and documents available to all account holders
- Displays account specific documents uploaded to the account's Related Files folder in our database.



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Frequently Asked Questions (FAQ)

<u>Forgot your User Name?</u>
Use the Forgot Login link on the Login page or call us at (501) 664-8632 to request assistance.

<u>Forgot your Password?</u>
Click on the link, “Forgot Password.” You will be prompted to enter your phone number and select a verification method (Text or Call). The phone number entered must match the information we have on file. A token to change your password will then be sent to you. If you have any difficulties, call us at (501) 664-8632.

<u>If I have multiple accounts, can I see the details for each account separately?</u>
Yes. For account holders with access to multiple accounts, you will see a drop-down menu which allows you to select each account to view.

Account Activity

<u>How will I know when my account statement has been posted on line?</u>
You will receive an email notification when account statements are posted online.

<u>What does “party name” mean when I download deposit activity to Excel?</u>
“Party name” is the legal contributor, which is the entity that signed the check or made an 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.”

<u>What does “Approved” status mean?</u>
The “approved” status signifies the transaction has received approval in the system, but has not yet been paid.

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<u>What does “Posted” status mean?</u>
The “posted” status signifies the transaction has been posted on the account and is ready to be or has been paid.

<u>What is an “issued” date?</u>
The “issued” date captures when payment is sent to the recipient.