NEW PORTAL USERS

1. Submit your Gator Link credentials on the portal login page
   • https://intranet.uff.ufl.edu
2. E-Mail your department’s AER liaison notifying them that you have provided your credentials
3. You will then receive a confirmation from UFF Central that your access to the portal has been granted
PORTAL WEBSITE

• https://intranet.uff.ufl.edu/

• Click here
Accessing the Portal

- Click “myHub”
Navigating and Opening the AER Portal

- Click on the “AER” tile
• Use the filter or the search icon to locate your funds

• Click on hyperlinked fund name
<table>
<thead>
<tr>
<th>Fund Type</th>
<th>Fund Name and ID</th>
<th>Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>F</td>
<td>Cathy Donnellan/ Albert E. and Birdie W. Einstein Fund, Inc./ William Merz Professorship - [018763]</td>
<td>College of Medicine</td>
</tr>
<tr>
<td></td>
<td>Kelly Footers</td>
<td>Tier: A</td>
</tr>
<tr>
<td></td>
<td>0001205865 - Mr. Richard P. Donnellan, Jr. and (Mrs. Cathy G. Donnellan) (Not Submitted), 0008281974 - Mr. Michael S. Lee (Not Submitted)</td>
<td>Tier</td>
</tr>
</tbody>
</table>

**Fund Admin. Name:**
- Primary Donor
- Second Donor
- Donor Advance ID
- FIQ Status

**Tier:**
- A
Creating a Fund Impact Questionnaire (FIQ)

- Click the + icon to create a new report
**FIQ - Signature Block**

- Type in the fields to populate the signature block
- Review the signature block to ensure that it contains all necessary titles

**FUND ADMINISTRATOR SIGNATURE BLOCK**

<table>
<thead>
<tr>
<th>First and Last Name</th>
<th>Position Title(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dr. Mary Smith</td>
<td>Professor and Alberta Gator Chair of Organic Chemistry</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Department</th>
<th>College/Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department of Chemistry</td>
<td>College of Liberal Arts &amp; Sciences</td>
</tr>
</tbody>
</table>

Please review the resulting signature block:

Dr. Mary Smith  
Professor and Alberta Gator Chair of Organic Chemistry  
Department of Chemistry  
College of Liberal Arts & Sciences
FIQ – SCHOLARSHIPS

- Two types of scholarships:
  - Scholarship
  - Fellowship

- Was the scholarship:
  - Awarded?
  - Not awarded?

AER Add Mod

GENERAL

Fund: Calvin L. Korf Turfgrass Research Program Fund [006127]
Admin: Robin Giblin-Davis
Purpose: GA: support scholarships, fellowships, or research at Ft Lauderdale Research & Education Center in golf course turfgrass studies.

Donors

- [x] 0002758110 - Mrs. Teresa A. Bedford
- [x] 0005376371 - Florida State Golf Association (Mr. James E. Demick)

* Is this a scholarship or fellowship?
  - Scholarship
  - Fellowship

* Was it awarded?
  - Yes
  - No
• If the scholarship or fellowship was awarded write in the scholar’s name and major

• For more than one scholar click the add icon (+) and more fields will appear

• The name/s will populate in the viewer below which includes the standard gratitude paragraph with variable information
If the scholarship or fellowship is not awarded you will need to provide a brief explanation to the donor as to why funds were held.

Your brief explanation should be 1-3 sentences.

Tip: Read full narrative (3 paragraphs) to ensure word flow sounds appropriate.
Unfortunately, the College was unable to award this past year as there were no eligible recipients. The student body of UF is wide and diverse and we hope to award this scholarship to a suitable candidate this coming academic year.
• Program & Research funds have 3 questions to answer

• If a question is not answered, the check box next to the question will need to be unmarked to exclude any empty questions on the final report
• Faculty funds have 4 questions to answer

• If a question is not answered, the check box next to the question will need to be unmarked to exclude any empty questions on the final report

ANNUAL ENDOWED FUND IMPACT QUESTIONNAIRE

How did you utilize the endowment to further your teaching, research, and professional goals in fiscal year 2020? *
☐ Include question

What is the most interesting thing you accomplished with the endowed funds this past year? *
☐ Include question

What are your goals for the coming year? *
☐ Include question

Please take this opportunity to thank the donors. If relevant, please include any additional information about accomplishments that would not have been possible without the endowed funds. *
☐ Include question
Click the export icon in the top right of the FIQ page to view your FIQ report in final form.
• Authors may save their work using “Save as Draft”

• Clicking “Submit” will indicate the author’s completion of this FIQ

• The next step is AER Rep approval
EDITING FIQ: SAVE AS DRAFT

- Click on the hyperlinked fund on the home page
- Click the hyperlinked name
- You may now edit the FIQ

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Audiences</th>
<th>Status</th>
<th>Created By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brian</td>
<td>Director, Poe Business Ethics Center</td>
<td>0004609345 - Mr. Charles E. Poe (Mrs. Corey A. Poe) 0005137302 - Mr. William F. Poe, Jr. 0006778944 - Mrs. Elizabeth B. Poe 0008276750 - Mrs. Marilyn P. Lunskis (Mr. Timothy P. Lunskis) 0008276768 - Mrs. Janice P. Mitchell (Mr. Gregory E. Mitchell) 0008276784 - Mrs. Keran Poe Smith</td>
<td>Fund Administrator Save as Draft</td>
<td>Brian Ray</td>
</tr>
</tbody>
</table>
TIPS FOR EFFECTIVE FIQ NARRATIVES

• FIQ should be written by the person best equipped to report gift impact
• Remember to recognize and show appreciation for donor support
• Illustrate the impact of the donor’s giving through story telling
• This is an opportunity to strengthen the relationship between UF and donors
• Show return on the donor’s investment with examples of how the funds were used
• Make sure your narrative reflects the fund purpose. Fund purpose can be found on the General section of the FIQ.