Grant Portal Basics Submit Initial Requirements



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Initial requirements are prerequisites to release of funds. Once they have been submitted to and approved by the Foundation, an unscheduled payment will be released from "Contingent" status. You, the grantee, are then able to complete and submit a payment request that meets the criteria discussed in the Grant Management Workshop.

 Go to <u>https://goldenleaf.fluxx.io</u>. Enter your username and password. Click Sign In. 	Login Now: Username Password Sign in	
2) In the menu on the left, scroll to and click Requirements Due.	 ← → C ⊆ goldenleaf C ⊆ goldenle	fluxx.io/dashboard/index Search. Initial requirements due for R-202303-07360 Terri's Mega Foundation Grant ID: R-202303-07360 Due: May 20, 2024 I Type: Requirement - Project Budget for Approval Report ID: 12426 Status: New / Pending Submission Status: New / Pending Submission Terri's Mega Foundation Grant ID: R-202303-07360 Due: May 20, 2024 I Type: Requirement - Signed Grant ID: R-202303-07360 Due: May 20, 2024 I Type: Requirement - Grant Management Workshop Attendance Verification Report ID: 12424 Status: New / Pending Submission Terri's Mega Foundation Grant ID: R-202303-07360 Due: May 20, 2024 I Type: Requirement - Grant Management Workshop Attendance Verification Report ID: 12424 Status: New / Pending Submission Image Foundation Grant ID: R-202303-07360 Due: May 20, 2024 I Type: Requirement - Outcomes and Activities Report ID: 12425 Status: New / Pending Submission Image Foundation Grant ID: R-202303-0736
	Unscheduled Payments (2) Submitted Payment Requests (1)	Status: New / Pending Submission

Grant Portal Basics

Submit Initial Requirements



- From the list, select the desired requirement—in this example, *Project Budget* for Approval.
- Confirm the requirement is for the correct grant and due date. (This is an important step if your organization is managing more than one grant.)
- 5) Click the + to upload the required document(s). See next section for details.
- 6) Click **Submit**.
- 7) Click Add files.
 - a) Locate and select file(s) you desire to upload.

Search 3			Edit
Terri's Mega Foundation 4 Grant ID: R-202303-07360	Terri's Mega Foundation		
Budget for Approval Report ID: 12428 Status: New / Pending Submission	Grant ID: R-202303-07360 Report Type: Requirement - Project Budget for Approval	Due: May 20, 2024 Report ID: 12426	
Terri's Mega Foundation Grant ID: R-202303-07380 Due: May 20, 2024 I Type: Requirement - Signed	Status	New / Pending Submission	
Report ID: 12427 Status: New / Pending Submission	▼ Table Of Contents		
Terri's Mega Foundation	Requirements Notes Documents		
Grant ID: H-202303-07380 Due: May 20, 2024 I Type: Requirement - Grant Management Workshop Attendance Verification Report ID: 12424 Status: New / Pending Submission	Due Date:	5/20/2024	
Terri's Mega Foundation	▼ Requirements Notes		
Due: May 20, 2024 I Type: Requirement - Outcomes and Activities Report ID: 12425 Status: New / Banding Submission	▼ Documents		5
	Requirement - Project Budget for Approval		•
Terri's Mega Foundation Grant ID: R-202303-07360 Due: May 20, 2024 I Type: Requirement - Evidence of Sufficient Funds to Complete the		Requirement Attachments	
Project Report ID: 12423 Status: New / Pending Submission			
Terri's Mega Foundation Grant ID: G-202411-08764 Due: December 31, 2023 I Type: Requirement -			6
≪≪ 1 - 14 of 14 IPI>			Submit



b) Click Open

or

c) Drag file(s) into the upload window.

Open	at fluw io/dachboard/indov			×		
← → × ↑ 📜 > USB Driv	ve (E:) > Desktop > Test documents	v 0	Search Test documents	م		
Organize • New folder			8= • C	1 0		
📓 Videos 🔷 Na	ame	Date modified	Туре	Size ^		
📫 OS (C:)	Payments	11/17/2023 2:58 PM	File folder			Due: May 20, 2024
🥪 USB20FD (D:)	1 Test doc	5/16/2022 10:58 AM	Microsoft Word D		novali	report to: 12420
🥪 USB Drive (E:)	1 Test pdf	7/26/2022 9:32 AM	Adobe Acrobat D		11 10	
🗙 Data (J:)	1 test pic	7/25/2022 10:25 AM	JPG File	3,1	New / Pen	ding Submission
🥪 2022 Database (1 test workbook 7a	5/16/2022 10:59 AM	Microsoft Excel W	~		
Stranger (S:)	2 Test doc	8/31/2022 10:34 AM	Microsoft Word D			×
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tbryant (\\glf-fsa	8204_Terris Mega Fdn_sample pmt req_a	10/20/2023 4:16 PM	Adobe Acrobat D	1		Size Status
Software (X ⁻)	8892_Single Stage grant_Grantee Ackno	2/12/2024 10:23 AM	Microsoft Word D			
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USB Drive (E:) V <				>		
File name: 1	test workbook	~	All Files	~	ere.	
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Dave i assessa ta Pala				.d		
Requirements to Edit Submitted Requirements	Grant ID: H-202303-07380 Due: May 20, 2024 I Type: Requirement - Outcomes and Activities Report ID: 12425 Status: New / Reading Submission	Add files Sta	art upload			

Grant Portal Basics

Submit Initial Requirements



d) Wait until upload window Upload files indicates **Upload** Select or drag files then start upload 7e Complete! Size e) Click X to close the upload window. ed 0/1 files 8 KB 0% 8) Confirm uploaded Edit 🖨 document(s) then click Submit. Due: May 20, 2024 Report ID: 12426 Status ▼ Table Of Contents Due Date: 5/20/2024 Requirements Note Documents irement Attach • 🖬 😑 Submit 9) Click OK. Submit You are about to Submit this Requirements form. Please confirm that you would like to proceed. Cancel OK 10) Confirm submission: ₿ a. Status has changed to Golden LEAF **Report Submitted**. b. The record is now Table Of Conte visible in the Submitted Due Date Requirements Requirements Note section of the menu. Documents c. There is no longer an Edit button.



Golden LEAF Staff Follow-Up

If your program officer requires additional information or documents, the person listed as "Primary Contact" for the grant will receive an email notification explaining what is needed and requesting login to the grant portal to respond.

1) In the menu on the left, scroll Search ... to and click Requirements Golden to Edit, then select the requirement that has been Terri's Mega Foundation Grant ID: G-202303-07360 returned to you. Due: May 20, 2024 I Type: Requirement -Evidence of Sufficient Funds to Complete the All Project Note: The status has Report ID: 12423 changed to Returned to Status: Returned to Grantee Grantee. Active (4) Closed **REQUIREMENTS (10)** Requirements Due (8) Requirements to Edit (1) Submitted Requirements (1) 2) Instructions from the Edit 🖨 Foundation will be highlighted in yellow at the top of Terri's Mega Foundation requirement. (These are the same instructions that were in Grant ID: R-202304-07667 Due: May 20, 2024 Report ID: 12432 rt Type: Requir ont - Evir the notification email.) Click Edit. ent from XYZ Agency that Note To Foundation

Status

 Type your narrative response in the Note to Foundation field.

Note from the Foundation: Please upload the fully executed copy of performance agreement from XYZ Agency that was submitted as evidence of funding.										
Note To	o Four	datio	n							
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Awaiting Follow-up Info from

Grant Portal Basics

Submit Initial Requirements



4) Click T to upload additional	▼ Documents
or revised documents.	Requirement Attachments
Click Save and Close.	1 Test pdf.pdf Requirement - Evidence of Sufficient Funds to Complete the Project Added by Terri Adou-Dy at 12:28 PM on April 12, 2024
	Cancel Save and Close
 Click Send Supporting Info, then click OK. 	Requirement Attachments
	1 Test pdf.pdf Requirement - Evidence of Sufficient Funds to Complete the Project Added by Terr Adou-Dy at 12:28 PM on April 12, 2024
	Send Supporting Info
	Send Supporting Info X You are about to Send Supporting Info this Requirements form. Please confirm that you would like to proceed. Cancel OK
6) Confirm that status has changed to Report Submitted .	Terri's Mega Foundation Grant ID: R-202303-07360 Due: May 20, 2024 Report Type: Requirement - Project Budget for Approval Report ID: 12426 Status Report Submitted



Checking Requirement Status

You can find requirements that have *not* been submitted in the **Requirements Due** section of the grant portal menu. If requirements have been returned to you for additional information, you can find them in **Requirements to Edit**. And finally, once submitted to the Foundation, you can check the status in **Submitted Requirements**.

Golden	Search		
LEAF	Terri's Mega Foundation Grant ID: G-202303-07360	Terri's Mega Foundation	
All 🗘	Due: May 20, 2024 I Type: Requirement - Project Budget for Approval Benort ID: 12428 Status: Approved	Grant ID: G-202303-07360 D Report Type: Requirement - Project Budget for Approval R	Due: May 20, 2024 Report ID: 12426
Active (4)		Status Approved	
Closed		Status Appioved	
REQUIREMENTS (10)			
Requirements Due (8)		V Table Of Contents	
Requirements to Edit (1)		Requirements Notes	
Submitted Requirements (1)	-	Documents	

Approved requirements remain in the **Submitted Requirements** folder, in view-only status—uploaded documents can no longer be modified or removed by you. Previously uploaded documents can only be previewed.

Still have grant portal questions? Send your question(s) to <u>grantportalhelp@goldenleaf.org</u> or drop by virtual office hours (schedule posted <u>here</u>).