Grant Portal Basics
Submit Initial Requirements

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.

1) Go to https://goldenleaf.fluxx.io. Enter your username and password. Click **Sign In**.

2) In the menu on the left, scroll to and click **Requirements Due**.

3) From the list, select the desired requirement—in this example, **Project Budget for Approval**.

4) 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.)
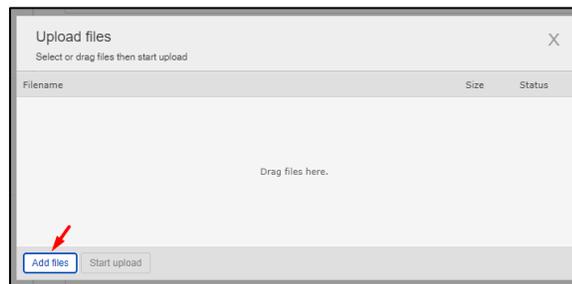
5) Click the **+** to upload the required document(s). See next section for details.
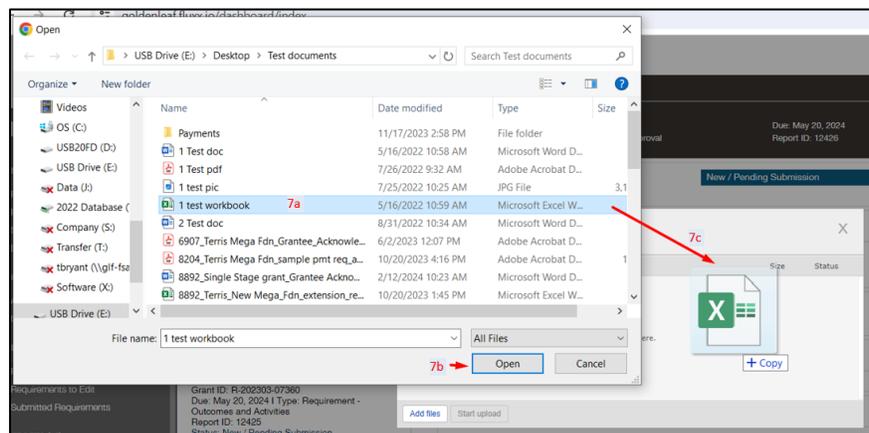
6) Click **Submit**.
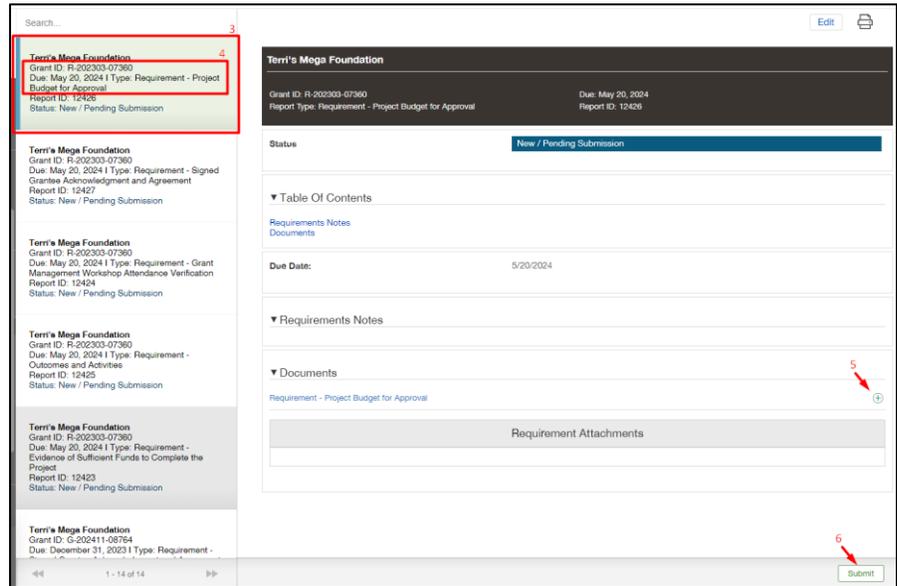
7) Click **Add files**.

   a) Locate and select file(s) you desire to upload.

   b) Click **Open**

      or

   c) Drag file(s) into the upload window.
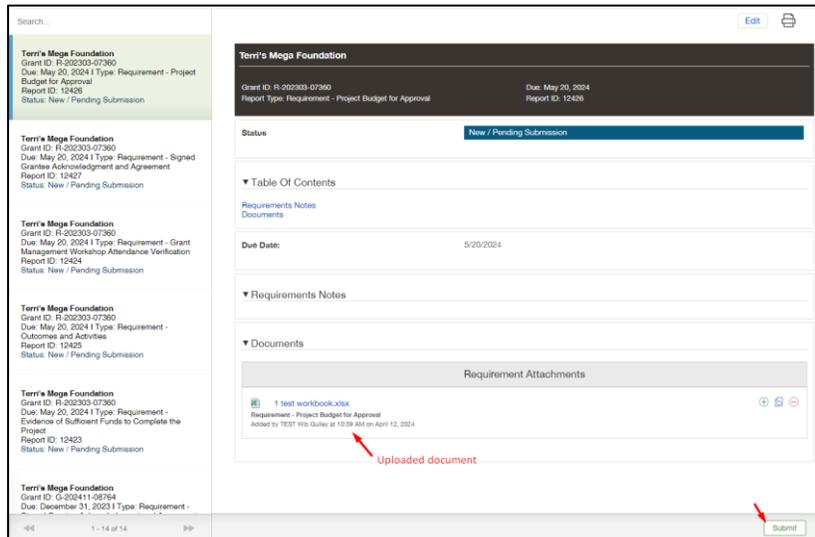
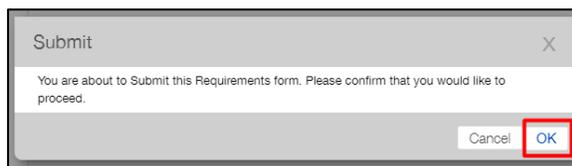d) Wait until upload window indicates **Upload Complete!**

e) Click **X** to close the upload window.
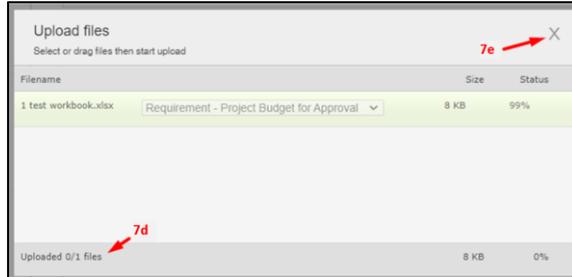
8) Confirm uploaded document(s) then click **Submit**.
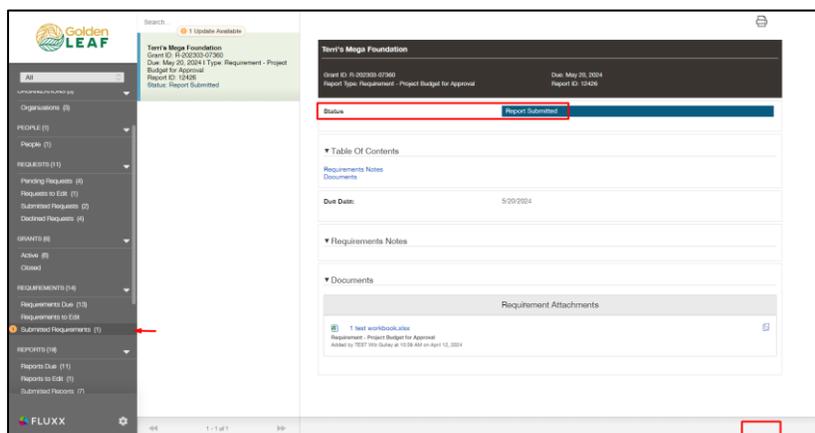

9) Click **OK**.

10) Confirm submission:
   a. Status has changed to **Report Submitted**.

   b. The record is now visible in the **Submitted Requirements** section of the menu.

   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 to and click **Requirements to Edit**, then select the requirement that has been returned to you.

   Note: The status has changed to **Returned to Grantee**.
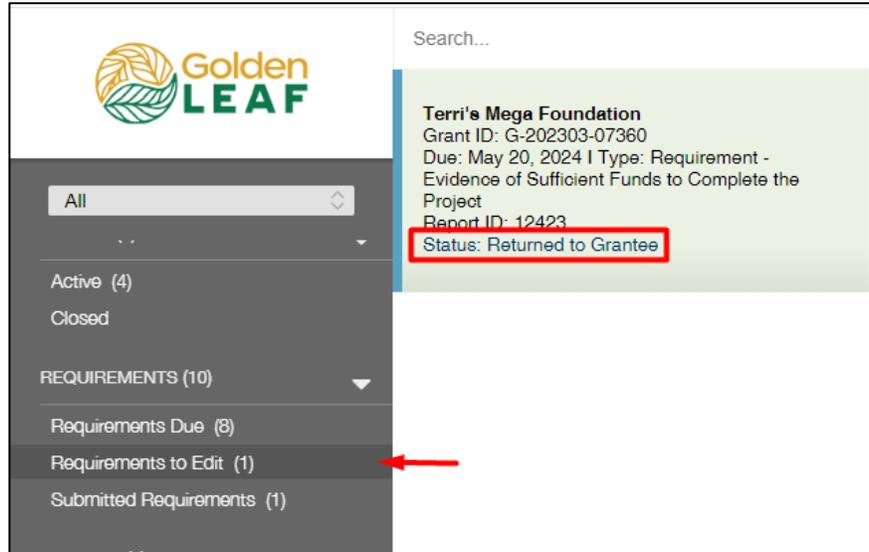
2) Instructions from the Foundation will be highlighted in yellow at the top of requirement. (These are the same instructions that were in the notification email.)

   Click **Edit**.
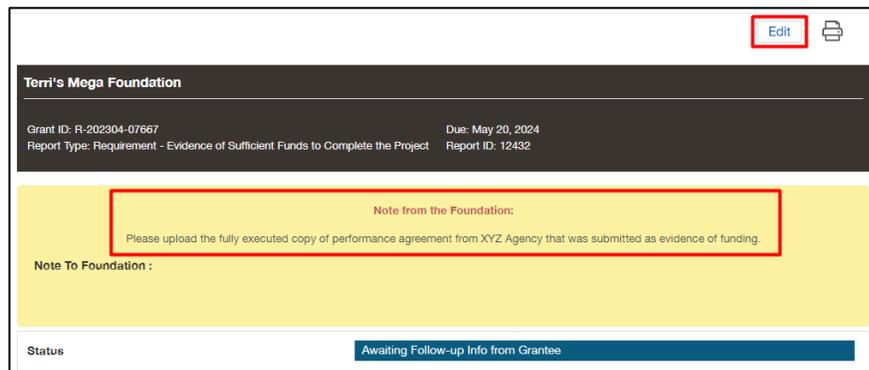
3) Type your narrative response in the **Note to Foundation** field.

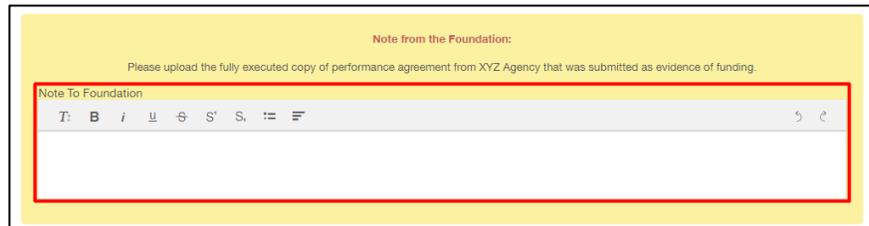4) Click **+** to upload additional or revised documents.

   Click **Save and Close**.

> ▾ Documents
>
> Requirement Attachments ⊕
>
> 📄 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   ABC✓   Save   Save and Close

5) Click **Send Supporting Info**, then click **OK**.

> ▾ Documents
>
> Requirement Attachments ⊕
>
> 📄 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
>
> Send Supporting Info

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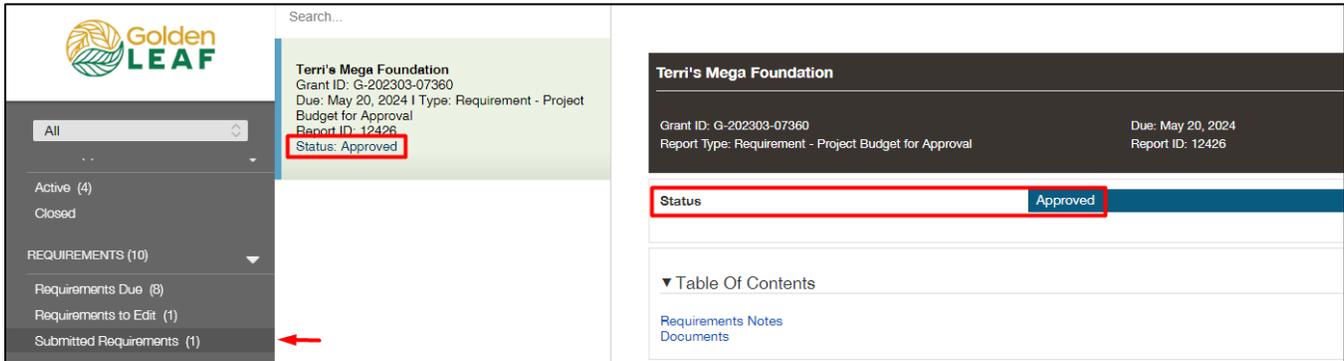
Approved requirements remain in the **Submitted Requirements** folder, in view-only status—uploaded documents can no longer be modified or removed by you. Previously uploaded documents can only be previewed.

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