



## **Introduction**

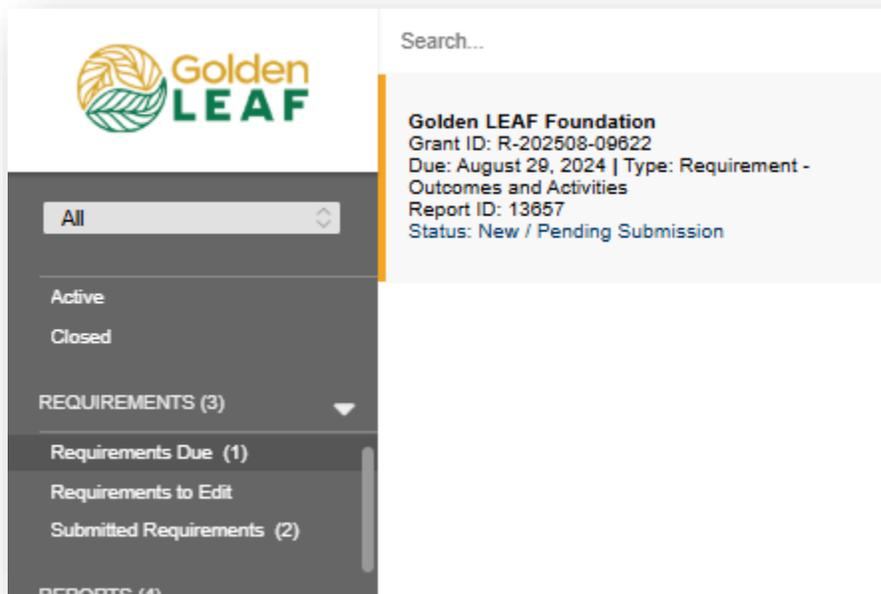
Initial requirements are prerequisites to release of funds. Once they have been submitted to and approved by the Foundation, an unscheduled payment will be released from "Contingent" status. You, the grantee, are then able to complete and submit a payment request that meets the criteria discussed in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

## **Contents**

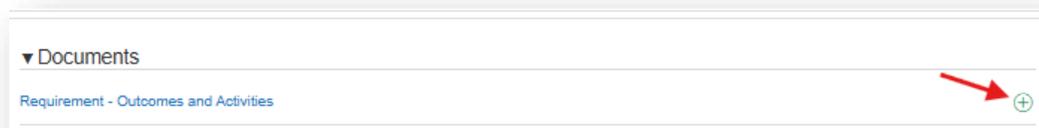
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## Steps to Submit Initial Requirements

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, *Outcomes and Activities*.

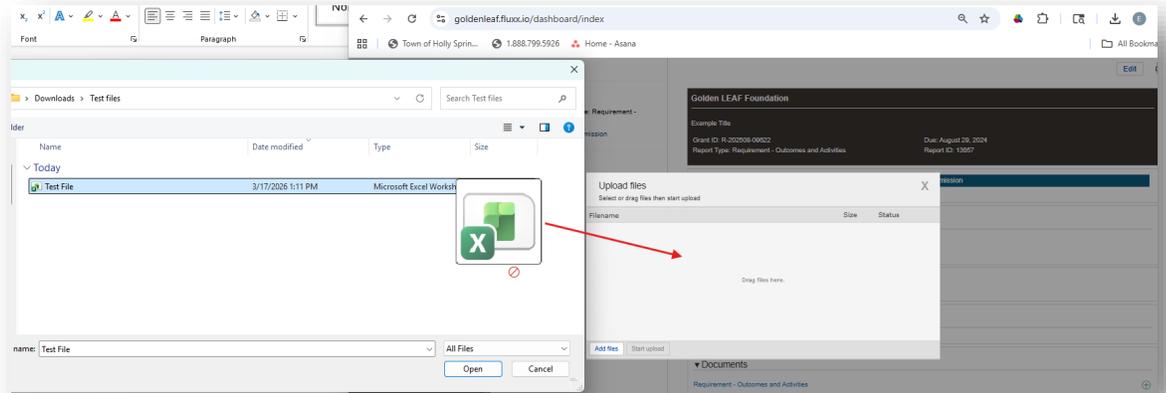


4. Confirm the requirement is for the correct grant and due date. (This is an important step if your organization is managing more than one grant.)
5. Click the + to upload the required document(s).



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

7. Click **Open**, or drag file(s) into the upload window.



8. Wait until upload window indicates **Upload Complete!**.

9. Click **X** to close the upload window.

10. Click **Submit**.

**Golden LEAF Foundation**

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Example Title

Grant ID: R-202508-09622      Due: August 29, 2024  
Report Type: Requirement - Outcomes and Activities      Report ID: 13657

Status **New / Pending Submission**

▼ Table Of Contents

[Requirements Notes](#)  
[Documents](#)

Due Date: 8/29/2024

▼ Requirements Notes

**Submit**

11. Confirm submission:

- Status has changed to **Report Submitted**.
- The record is now visible in the **Submitted Requirements** section of the menu.
- There is no longer an **Edit** button.

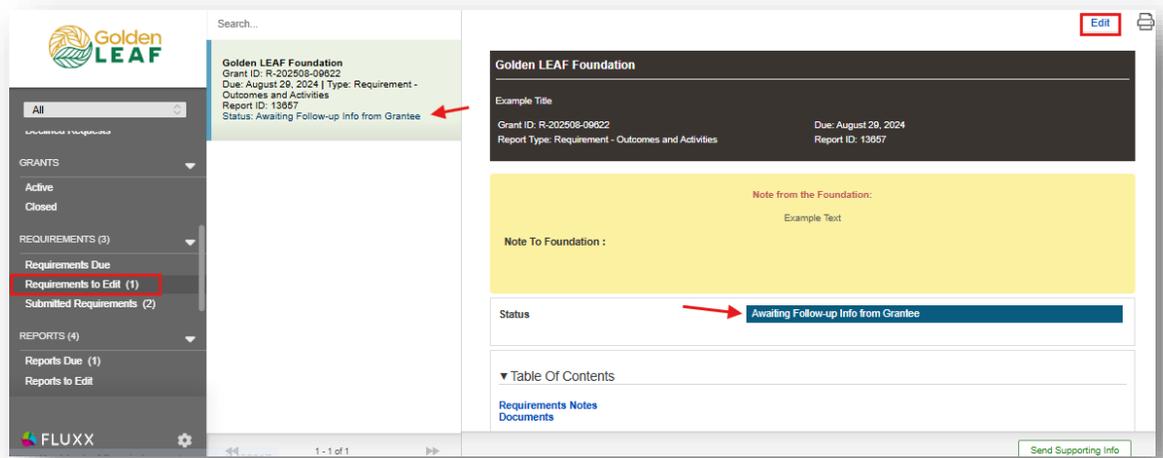
The screenshot displays the Golden LEAF Foundation reporting interface. On the left is a navigation menu with categories: All, Active, Closed, REQUIREMENTS (3), REPORTS (4), and RESULTS (3). Under REQUIREMENTS (3), the sub-items are: Requirements Due (1), Requirements to Edit, Submitted Requirements (2), and Requirements to Edit. A red arrow points to 'Submitted Requirements (2)'. The main content area shows a search bar and a list of requirements. The first requirement is highlighted in green and has a red arrow pointing to its status 'Received'. The details for this requirement are: Golden LEAF Foundation, Grant ID: R-202508-09622, Due: August 31, 2024 | Type: Requirement - Construction Agreement, Report ID: 13654, Status: Received. The right-hand panel shows the details for this requirement, including the title 'Golden LEAF Foundation', grant ID, due date, and report type. The status is shown as 'Received' with a red arrow pointing to it. Below this, there are sections for 'Table Of Contents', 'Requirements Notes Documents', 'Due Date: 8/31/2024', and 'Requirements Notes'.

## Golden LEAF Staff Follow-Up

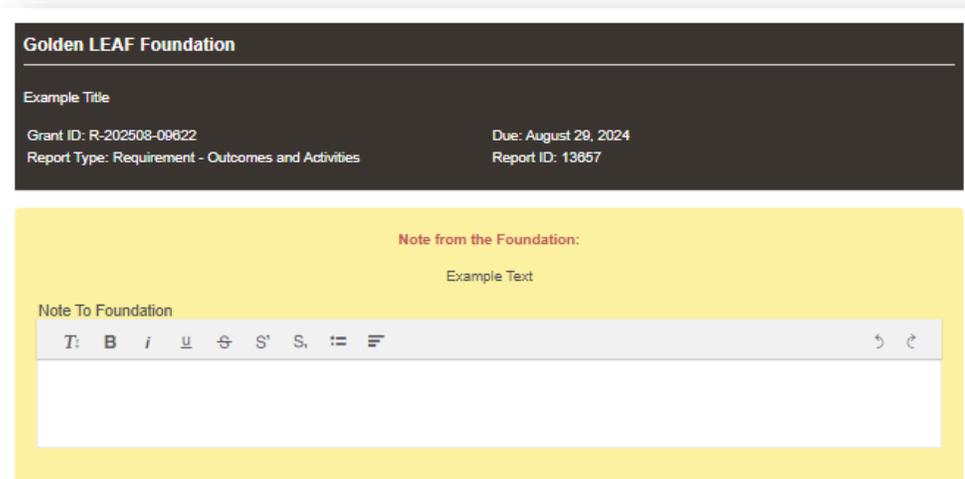
If your program officer requires additional information or documents, the person listed as "Primary Contact" for the grant will receive an email notification explaining what is needed and requesting login to the grant portal to respond.

12. 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 **Awaiting Follow-up Info from Grantee**.

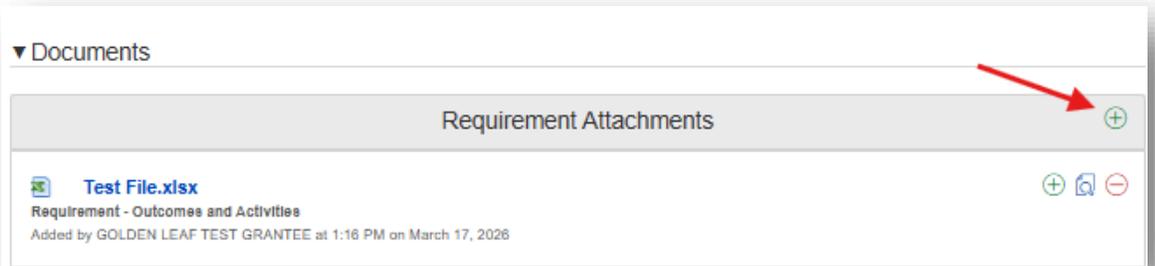
13. Instructions from the Foundation will be highlighted in yellow at the top of requirement. Click **Edit**.



14. Type your narrative response in the **Note to Foundation** field.

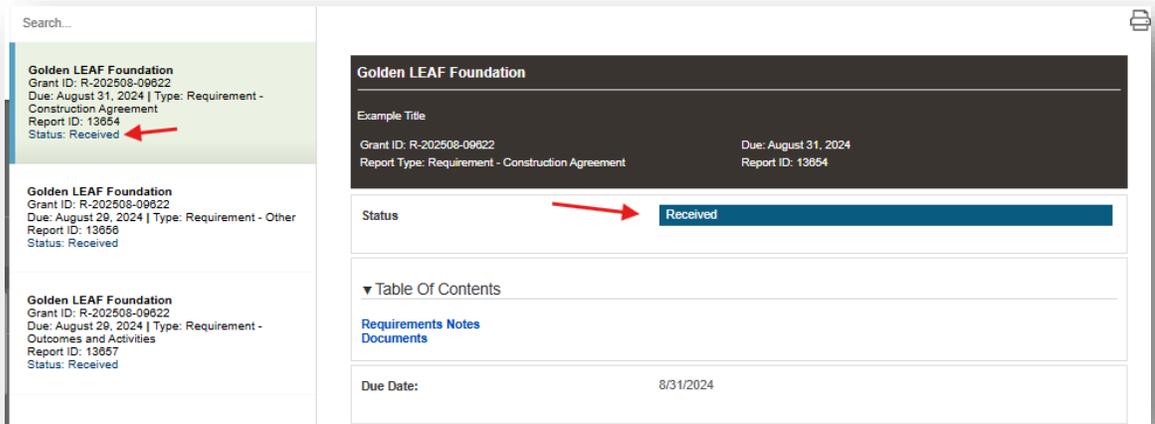


15. Click **+** to upload additional or revised documents. Click **Save and Close**.



16. Click **Send Supporting Info**, then click **OK**.

17. Confirm that status has changed to **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**. 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.

The screenshot displays the grant portal interface for the Golden LEAF Foundation. On the left, a search results list shows three entries for 'Golden LEAF Foundation' with details like Grant ID, Due date, and Status. The first entry, with Report ID 13654 and Status 'Received', is highlighted in green and has a red arrow pointing to it. The main content area shows a detailed view for a requirement with Grant ID R-202508-09622 and Report ID 13654. The 'Status' field is set to 'Received', also indicated by a red arrow. Below this, there is a 'Table Of Contents' section with links for 'Requirements Notes' and 'Documents', and a 'Due Date' field showing 8/31/2024.

## Contact Information

Still have grant portal questions? Send your question(s) to [grantportalhelp@goldenleaf.org](mailto:grantportalhelp@goldenleaf.org) or drop by virtual office hours (schedule posted on the Golden LEAF website [here](#)).