

# Grant Portal Basics

## Request a Modification



Follow the instructions below to request an amendment.

- **Extension Request:** To request an extension of the grant term to MM/DD/YYYY.
- **Budget Modification Request:** Typically, to request reallocation of the Golden LEAF grant between Golden LEAF-approved budget line items.
- **Project Modification Request:** To request a deviation from the approved purpose of the grant or from the projected outcomes and/or activities.

Keep in mind that some modification requests may require the approval of the Golden LEAF Board of Directors. Communicate with your assigned program officer early if you anticipate the need for an amendment.

- 1) Log in to your account at <https://goldenleaf.fluxx.io>.

The screenshot shows a login interface with the following elements:

- Login Now:** A heading above the input fields.
- Username:** A text input field.
- Password:** A password input field.
- Sign in:** A button below the input fields.
- Reset or create password:** A blue hyperlink below the sign in button.

- 2) Review amendment (modification) information on the grantee portal home page.

The screenshot shows the dashboard layout with the following sections:

- Left Sidebar:** Contains navigation links such as 'Grantee Portal' (highlighted with a red box), 'Apply for Funding', 'ORGANIZATIONS (8)', 'PEOPLE (1)', 'REQUESTS (18)', 'GRANTS (7)', and 'REQUIREMENTS (19)'. The 'FLUXX' logo is at the bottom.
- Main Content Area:** Contains several informational sections:
  - Submitted Requirements:** Information about requirements under review.
  - REPORTS:** Includes 'Reports Due' and 'Reports to Edit'.
  - Submitted Reports:** Information about read-only versions of reports.
  - PAYMENTS:** Includes 'Unscheduled Payments' and 'Submitted Payment Requests'.
  - Payment Requests to Edit:** Information about requests under review.
  - Paid Payments:** Information about processed payments.
  - AMENDMENTS:** This section is highlighted with a red box and includes:
    - Under Review:** Information about modification requests submitted for approval.
    - Amendments to Edit:** Information about requests under review.
    - Approved Amendments:** Information about approved modification requests.

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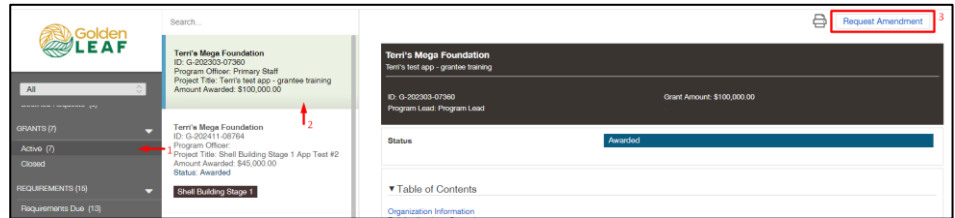
## Request a Modification



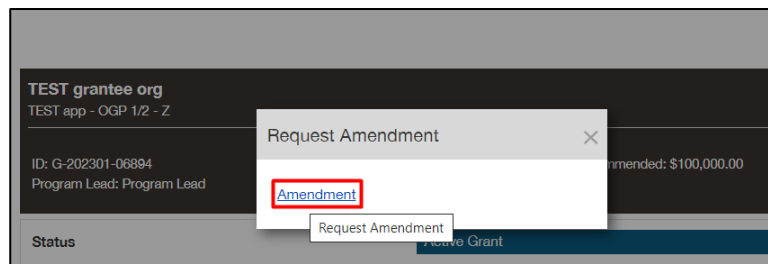
- 3) In the menu on the left, scroll to the GRANTS section and click **Active** (1).

Click the active grant for which you're requesting a modification (2).

Click **Request Amendment** (3).

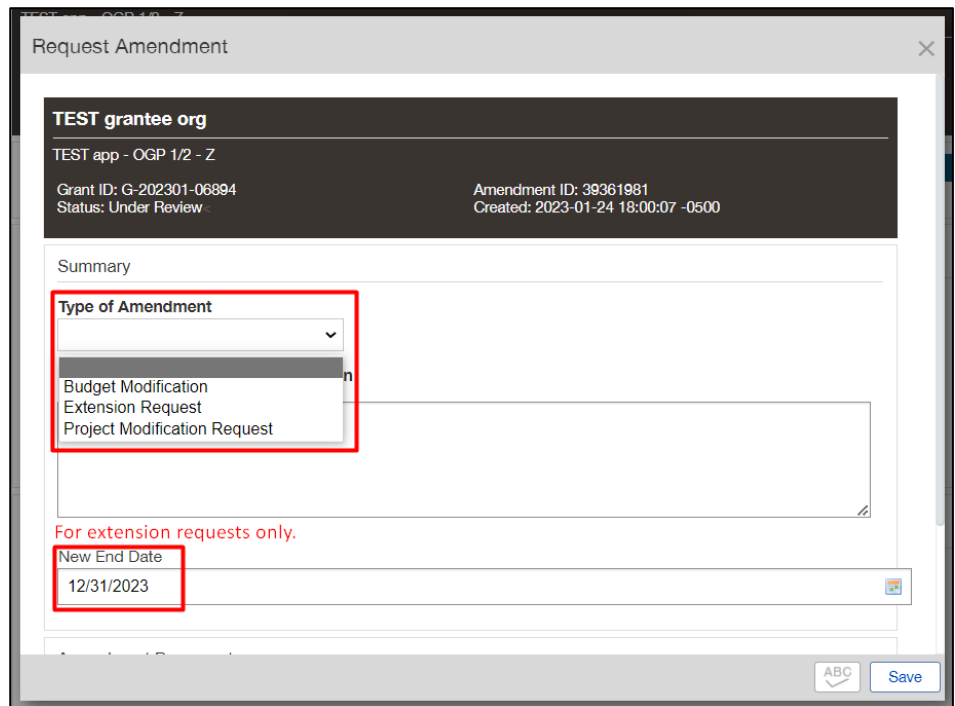


- 4) Click **Amendment**.



- 5) Select, from the drop-down menu, the type of amendment you're requesting:
- Budget modification,
  - Extension request, or
  - Project modification

NOTE: Create and submit a separate request for each desired modification. Do not combine requests. You may submit multiple requests, each with its unique (online) amendment request submission form.



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- 6) Describe the modification request, why it's needed, how it will affect project outcomes, etc.

A screenshot of a web form titled "Amendment Request and Justification". It features a large, empty rectangular text area for entering details about the modification request.

- 7) Upload required attachments (signed budget or project modification form, financial workbook, supporting documents, etc.)

A screenshot of the "Amendment Documents" section. It shows a header "Amendment Documents" with a dropdown arrow, followed by a table with a "DOCUMENTS" column and a red "+" icon in the right-hand cell. At the bottom right, there is a "Save" button highlighted with a red box.

Click [Save](#).

## 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 [Amendments to Edit](#), then select the amendment that has been returned to you.

A screenshot of a sidebar menu titled "AMENDMENTS (4)". It lists three categories: "Under Review", "Amendments To Edit (1)" (highlighted with a red box), and "Approved (3)".

- 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.)

A screenshot of an amendment details page for "Terri's Mega Foundation". It shows the grant ID (G-202303-07360), amendment ID (39390165), and status (Sent Back to Grantee). A yellow highlighted box contains a note from the foundation: "Please upload the contract, change order, or letter from the engineer that explains the work to drill through the granite." At the bottom, a status bar shows "Sent Back to Grantee" with a red box around it.

Note: The status has changed to **Sent Back to Grantee**.

Click [Edit](#).

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

A screenshot of a text input field labeled "Note to Foundation". The field is empty and is highlighted with a red border.

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

Click **Save and Close**.

A screenshot of the "Amendment Documents" section. It shows a "Documents" list with a "+ Add" button. At the bottom, there are buttons for "Cancel", "ABO", "Save", and "Save and Close". The "Save and Close" button is highlighted with a red border.

- 5) Click **Resubmit**, then click **OK**.

A screenshot of the "Amendment Documents" section. It shows a document titled "1 Test.pdf" with a "Resubmit" button highlighted in green. The "Resubmit" button is highlighted with a red border.

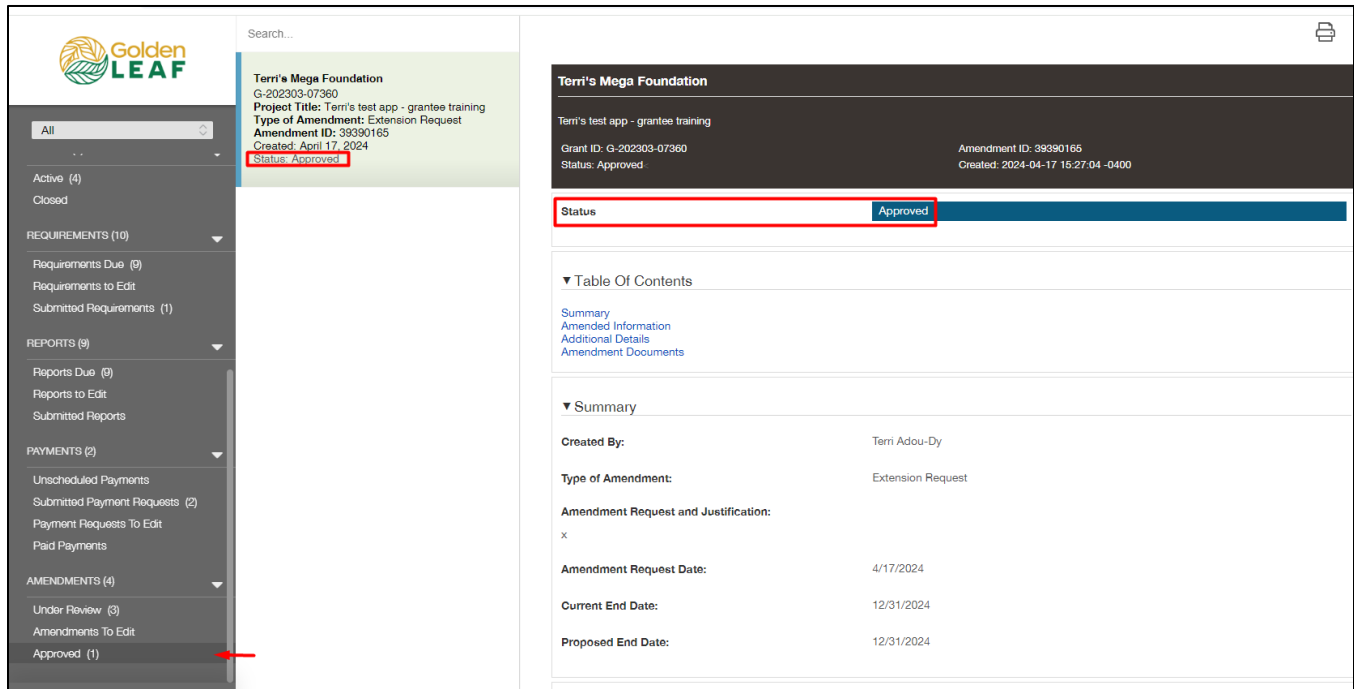
A screenshot of a "Resubmit" confirmation dialog box. The text reads: "You are about to Resubmit this Amendments form. Please confirm that you would like to proceed." There are "Cancel" and "OK" buttons. The "OK" button is highlighted with a red border.

- 6) Confirm that status has changed to **Under Review**.

A screenshot of the grant details page for "Terri's Mega Foundation". It shows the grant ID, amendment ID, and status. The status is "Under Review", which is highlighted with a red border.

## Checking Modification Status

You can find amendments that have been submitted in **Under Review** in the **AMENDMENTS** section of the grant portal menu. If amendments have been returned to you for additional information, you can find them in **Amendments to Edit**. And finally, once an amendment has been approved, you can find it in **Approved** in the **AMENDMENTS** section of the grant portal menu.



The screenshot displays the Golden LEAF Grant Portal interface. On the left is a navigation menu with categories like REQUIREMENTS, REPORTS, PAYMENTS, and AMENDMENTS. The AMENDMENTS section is expanded, showing 'Under Review (3)', 'Amendments To Edit', and 'Approved (1)'. A red arrow points to the 'Approved (1)' link. The main content area shows a search bar and a list of amendments. One amendment is highlighted: 'Terri's Mega Foundation' with details: 'G-202303-07360', 'Project Title: Terri's test app - grantee training', 'Type of Amendment: Extension Request', 'Amendment ID: 39390165', and 'Created: April 17, 2024'. The status 'Approved' is highlighted in red. Below this is a detailed view of the amendment, showing a 'Status' dropdown set to 'Approved', a 'Table Of Contents' with links for Summary, Amended Information, Additional Details, and Amendment Documents, and a 'Summary' section with fields for Created By (Terri Adou-Dy), Type of Amendment (Extension Request), Amendment Request and Justification (x), Amendment Request Date (4/17/2024), Current End Date (12/31/2024), and Proposed End Date (12/31/2024).

Approved amendments remain in the **Approved** 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](mailto:grantportalhelp@goldenleaf.org) or drop by virtual office hours (schedule posted [here](#)).