

Grant Portal Basics

Submit a Report



Reports are usually of three different types:

- **Interim Report:** Due every six months the grant is active; includes updates on project expenditures, activities, and outcomes, and other relevant organizational or ancillary project information.
- **Final Report:** Due 60 days of the end date of the grant; includes the same information as for an interim report.
- **Post Grant Update:** Typically, due annually; includes updates on outcomes.

- 1) Go to <https://goldenleaf.fluxx.io>. 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 **Reports Due**.

Golden LEAF

Search...

All

Active (4)

Closed

REQUIREMENTS (10)

Requirements Due (9)

Requirements to Edit

Submitted Requirements (1)

REPORTS (9)

Reports Due (9)

Reports to Edit

Submitted Reports

Terri's Mega Foundation
Project Title: Terri's test app - grantee training
Grant ID: G-202303-07360
Due: April 30, 2024
Type: Interim Report
Report ID: 12447
Status: New / Pending Submission

Terri's Mega Foundation
Project Title: Terri's test app - grantee training
Grant ID: G-202303-07360
Due: October 3, 2024
Type: Interim Report
Report ID: 12429
Status: New / Pending Submission

Terri's Mega Foundation
Project Title: Terri's test app - grantee training
Grant ID: G-202303-07360
Due: June 3, 2026
Type: Post Grant Update
Report ID: 12430
Status: New / Pending Submission

- 3) From the list, select the desired report.

Confirm the report is for the correct grant and due date. (This is particularly important if your organization is managing more than one grant.)

Golden LEAF

Search...

All

Active (4)

Closed

REQUIREMENTS (10)

Requirements Due (9)

Requirements to Edit

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4) Click **Edit**.

The screenshot shows the Grant Portal interface. On the left, there is a search bar and a list of reports for 'Terri's Mega Foundation'. The first report is highlighted. On the right, the detailed view of the selected report is shown. The 'Edit' button is highlighted in a red box in the top right corner.

5) Complete the narrative sections of the report with information that will not be captured in your discussion of outcomes and activities.

If there is no information to report, enter "None to report" or "N/A".

The screenshot shows the 'Narrative Information' section of the report form. The 'Purpose of Grant' section is highlighted with a red border. The text in this section reads: 'Briefly describe other activities, accomplishments or impacts, to date, associated with the project that are not included in this report's outcomes and activities sections. Please also discuss areas of underperformance. In your discussion, include factors that contributed to the underperformance and steps taken to address it.'

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- 6) Enter the number/ amount of each outcome achieved during the reporting period.

“Date reported from” and “Date reported to” dates should not overlap with prior reporting periods. For example, if the data entered for the “Date reported to” of 09/30/2023, the “Date reporting from” for this report should begin at 10/01/2023.

This is **not** a cumulative number.

If there are no outcomes for the reporting period, enter “0”.

▼ Priority Outcomes

Please enter data for baseline actual, date reported from and date reported to below. The other fields are generated based on your data you inputted into the application section. Then click “Save and Continue” to save data inputted.

Investment in publicly owned infrastructure	
Target:	\$1,000,000.00
Target date:	12/31/2023
Baseline:	
Baseline date:	12/31/2022
Data source:	records
Actual	<input type="text"/>
Date reported from	<input type="text"/>
Date reported to	<input type="text"/>

- 7) Enter updates for Other Project Outcomes and your overall assessment of progress toward outcomes as of the report date.

Other Project Outcomes: 8 completers employed in the area of study, funded by the grant, annually. Baseline: 0 (12/31/2022) Target: 24 (by 12/31/2024)

Grantee Assessment of Project Outcomes to Date

- 8) For each activity, enter the completion date **if** the activity has been completed.

Include discussion of delays, resolutions, etc. in the activity status field.

For incomplete activities or activities that have not started, provide an update on work accomplished toward the activity. If the activity requires completion of a preceding activity that is still incomplete, enter “N/A”.

▼ Project Activities

Activity 1 Key Activity Areas

Activity 1: Build

Activity 1 Target Date: 11/30/2023

Activity 1 Date Completed

Activity 1 Status

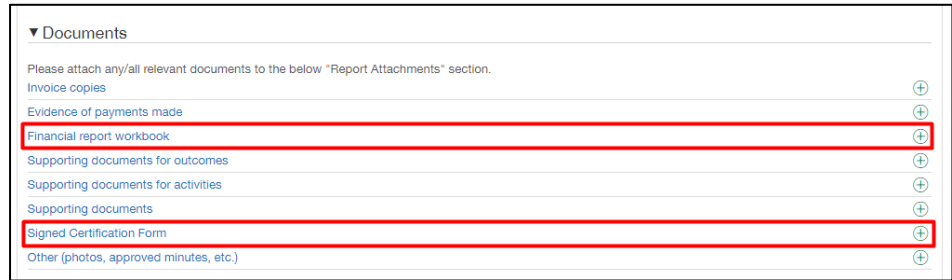
Discuss progress made to date, challenges and resolutions, explanations for not meeting target dates, and any other comments.

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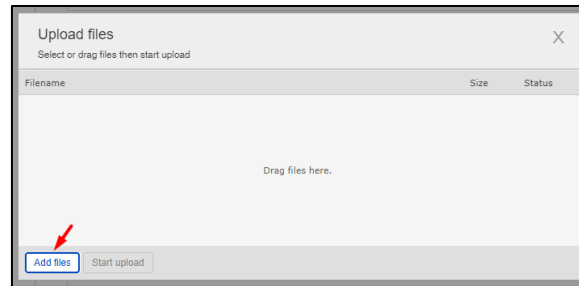


9) Upload required documents. Click the + to upload the required document(s).



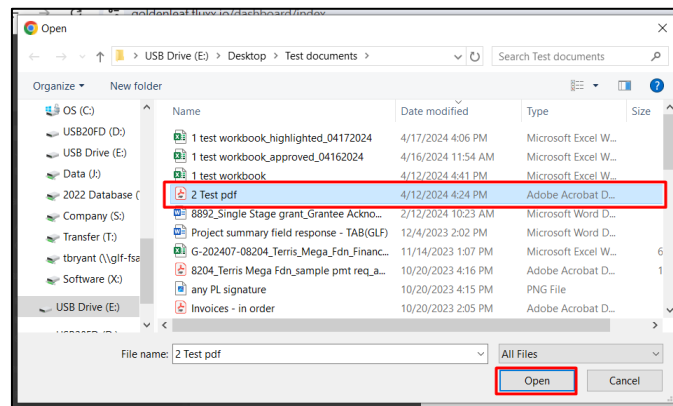
10) Click **Add files**.

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

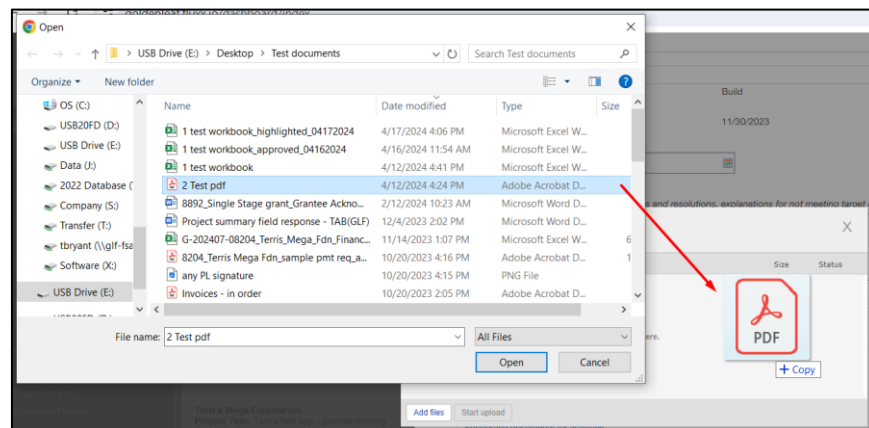


Click **Open**

or



Drag file(s) into the upload window.

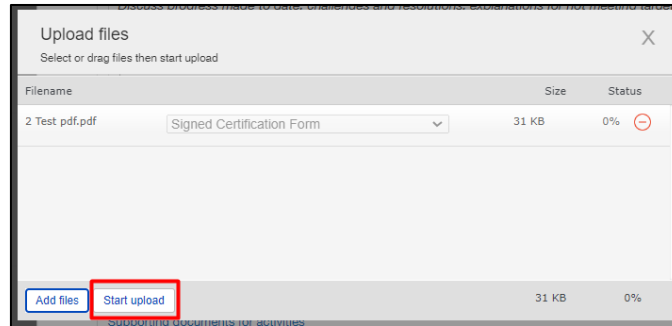


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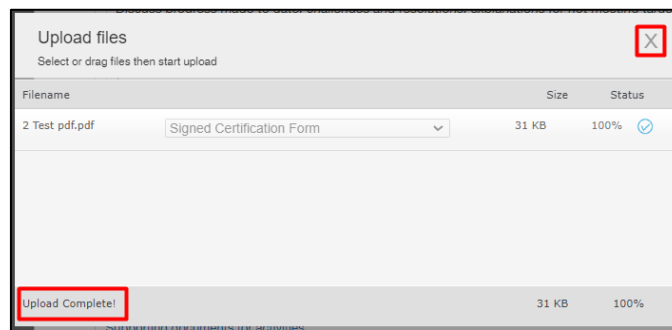
Submit a Report



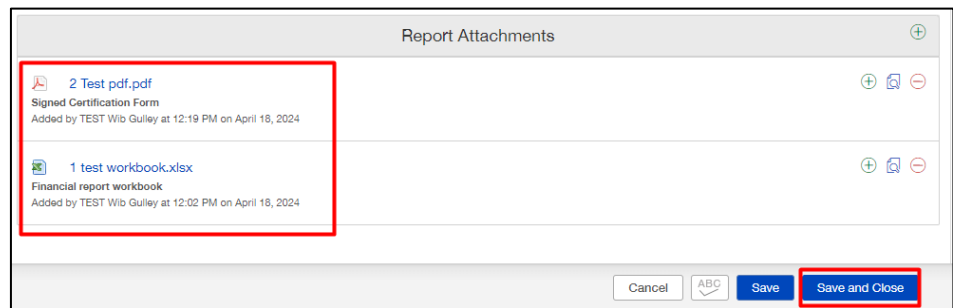
11) Click **Start Upload**.



Once the upload window indicates **Upload Complete!**, click **X** to close the window.



12) Confirm uploaded document(s) then click **Save and Close**.



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13) Click **Submit**.

Terri's Mega Foundation

Grant ID: G-202303-07360 Due: April 30, 2024
Report Type: Interim Report Report ID: 12447

Status: **New / Pending Submission**

▼ Table Of Contents

- Narrative Information
- Priority Outcomes
- Other Project Outcomes
- Grantee Assessment of Project Outcomes to Date
- Project Activities
- Documents

Due Date: 4/30/2024

▼ Narrative Information

Purpose of Grant:
Briefly describe other activities, accomplishments or impacts, to date, associated with the project that are not included in this report's outcomes and activities sections. Please also discuss areas of underperformance. In your discussion, include factors that contributed to the underperformance and steps taken to address it.

What lessons have been learned or best practices identified during the course of this project to date? What is your organization doing differently as a result of these lessons?

Provide information about any significant Board and/or staff changes in your organization.

Submit

Click **OK**.

Submit [X]

You are about to Submit this Reports form. Please confirm that you would like to proceed.

Cancel **OK**

14) Note the status to confirm the report has been successfully submitted to the Foundation.

Terri's Mega Foundation

Grant ID: G-202303-07360 Due: April 30, 2024
Report Type: Interim Report Report ID: 12447

Status: **Report Submitted**

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Submit a Report

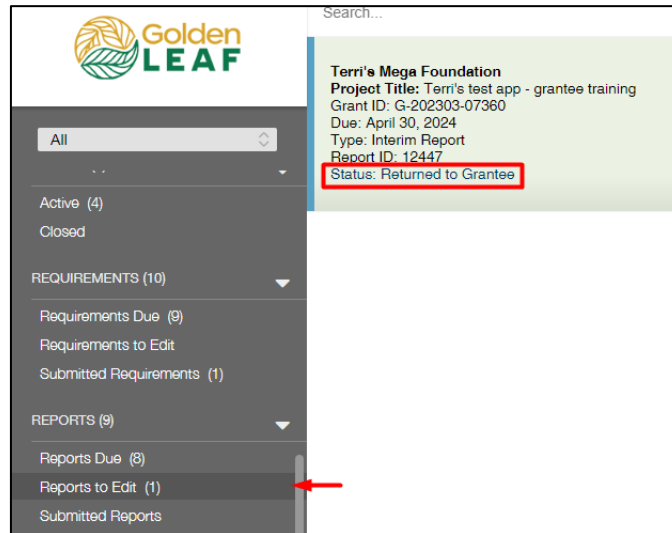


Golden LEAF Staff Follow-Up

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.

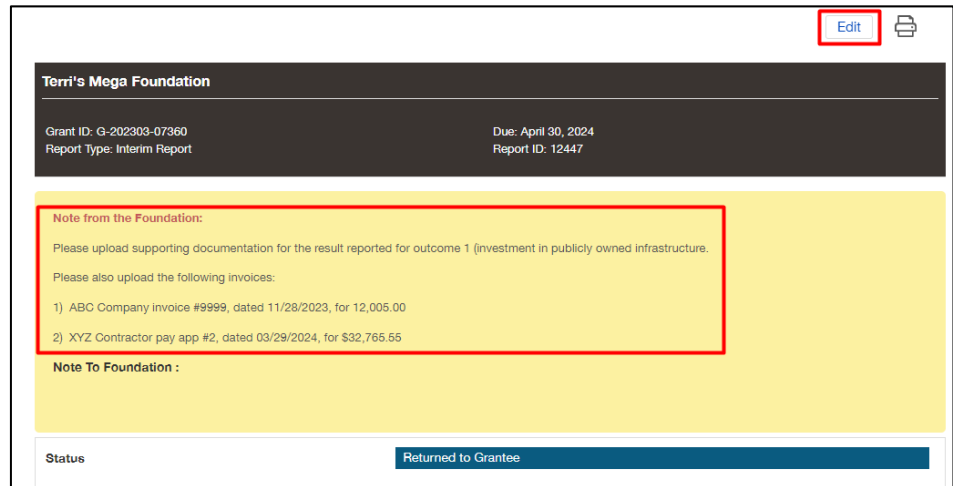
- 1) In the menu on the left, scroll to and click **Reports to Edit**, then select the report that has been returned to you.

Note: The status has changed to **Returned to Grantee**.

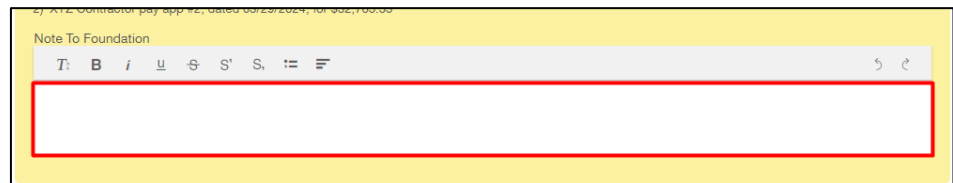


- 2) Instructions from the Foundation will be highlighted in yellow at the top of requirement. (These are the same instructions that were in the notification email.)

Click **Edit**.



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



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4) Click **+** to upload additional or revised documents. In this example, upload the requested invoices and outcomes documentation.

5) Confirm uploads.

Click **Save and Close**.

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

7) Confirm that status has changed to **Report Submitted**.

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Checking Report Status

You can find reports that have *not* been submitted in the **Reports Due** section of the grant portal menu. If reports have been returned to you for additional information, you can find them in **Reports to Edit**. Reports that have been submitted and are under review may be found in **Submitted Reports**.

A screenshot of the Golden LEAF Grant Portal interface. The left sidebar shows a navigation menu with categories like "All", "Active (4)", "Closed", "REQUIREMENTS (10)", and "REPORTS (9)". The main content area displays details for a report from "Terri's Mega Foundation". The report title is "Terri's test app - grantee training", Grant ID is "G-202303-07360", Due date is "April 30, 2024", Type is "Interim Report", Report ID is "12447", and Status is "Report Submitted". Below this, there is a "Table Of Contents" section with links for "Narrative Information", "Priority Outcomes", "Other Project Outcomes", "Grantee Assessment of Project Outcomes to Date", "Project Activities", and "Documents". The "Due Date" is listed as "4/30/2024".

Approved reports remain in the **Submitted Reports** 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](#)).