

Grants Portal User and Contact Guide

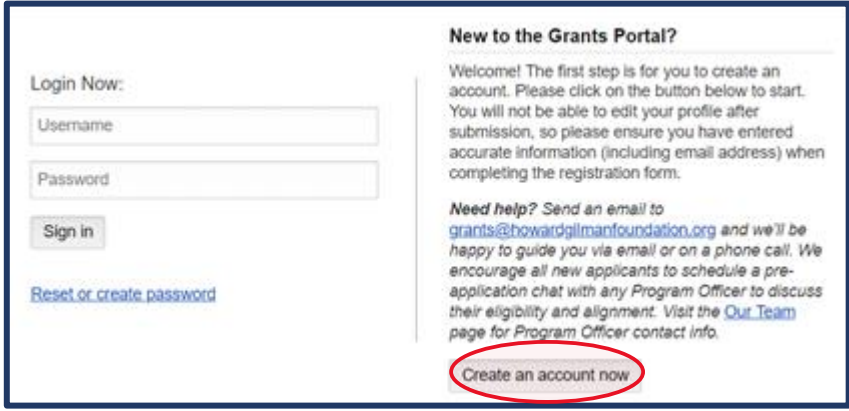
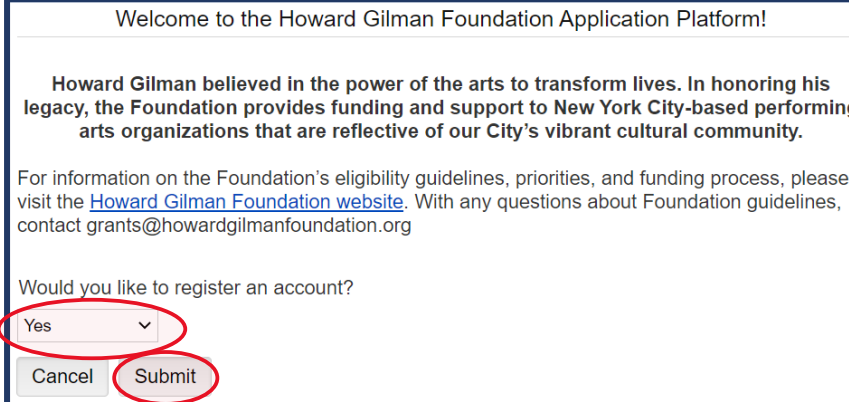
This document:

- Guides new users through the steps of registering as a user within the Gilman Grants Portal
- Guides new users through the process of setting up an organization profile and primary contacts in Gilman's Grants Portal
- Guides current users through the process of adding/editing existing contacts

Note: You are a new user if you have never created an account with the Gilman Foundation's grantee portal using your current work email address. Even if your organization is already in the Gilman grants portal, any new user to the portal must go through the full registration process described below.

Any questions should be addressed to the grants team at
grants@howardgilmanfoundation.org.

Creating a New Account on Fluxx

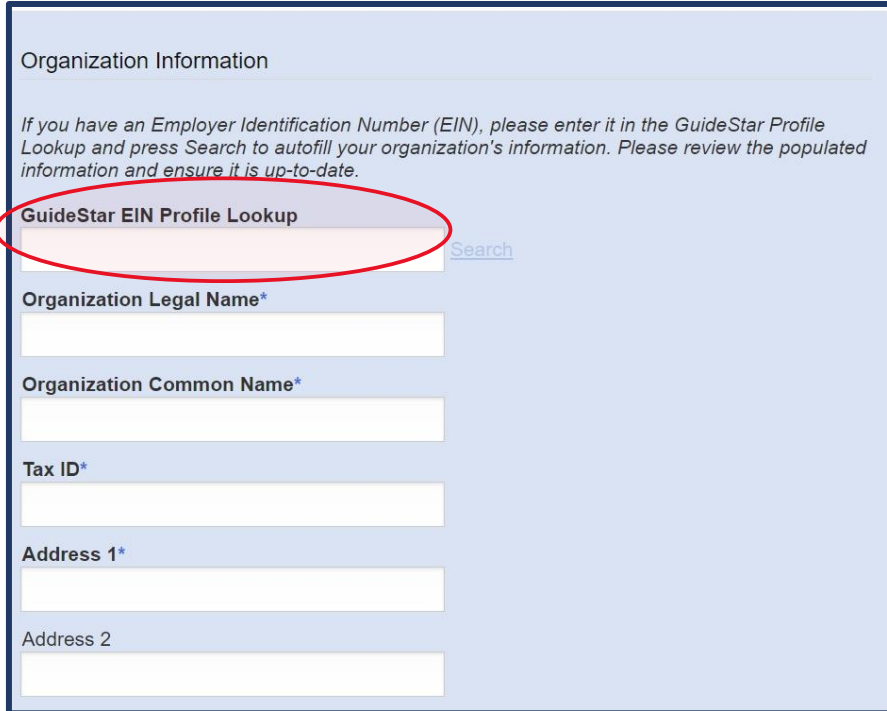
<p style="text-align: center;">Go to howardgilmanfoundation.fluxx.io.</p> <p>As a new user (even if your organization already has users who can log in to the database), you must click the Create an account now button.</p>	
<p>After reviewing the preliminary eligibility check, select Yes and then Submit if you would like to continue with registering your account.</p>	

Enter Basic Information

Use the **GuideStar EIN Lookup** to complete your organization information or enter the information manually.

Then fill out the rest of the required entries under "Organization Information."

This information is used to either create a new organization record within the system or connect a new user to an existing organization in the system.



Organization Information

If you have an Employer Identification Number (EIN), please enter it in the GuideStar Profile Lookup and press Search to autofill your organization's information. Please review the populated information and ensure it is up-to-date.

GuideStar EIN Profile Lookup [Search](#)

Organization Legal Name*

Organization Common Name*

Tax ID*

Address 1*

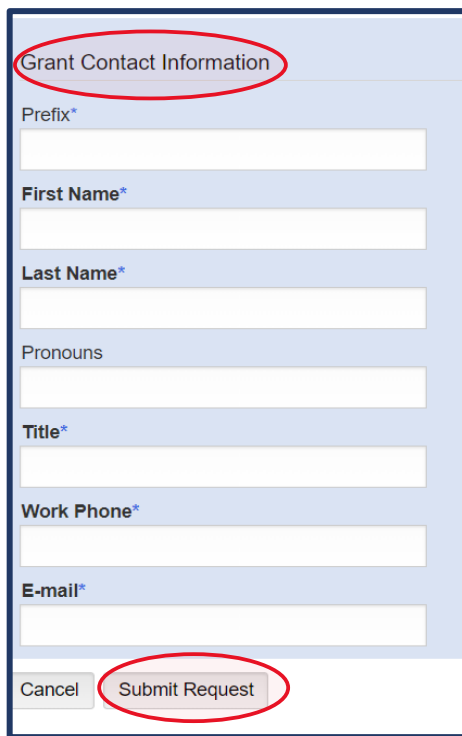
Address 2

Enter Grant Contact Information

Note: The Grant Contact should be the staff member who will interact most frequently with the grant portal. This is often the person who is writing the applications.

Once you have full access to your profile, there will be an opportunity to also add an Executive Leader, if different from the Grant Contact, who can be cc'ed on grant-related notifications without needing to register an account.

Complete the Grant Contact Information section and click **Submit Request**.



Grant Contact Information

Prefix*

First Name*

Last Name*

Pronouns

Title*

Work Phone*

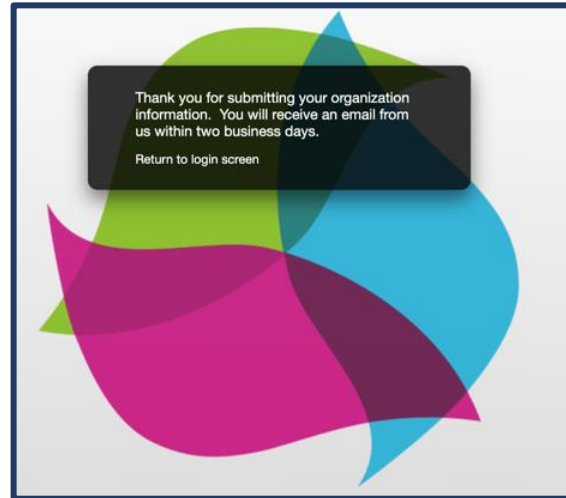
E-mail*

Cancel **Submit Request**

Confirm Submission

After submitting your request, this screen will appear, sending your request to Gilman staff for review.

Once Gilman staff review and approve your registration, you will receive an email with your login/username and a link to create a password typically within two business days.



Login Information Email Example

Included below is an example of the email you will receive when Gilman staff accept your registration request.

Click the link in the email under 'Password' and create a new password for your account. Then log-in with your username (email address) and new password.

Welcome to the Howard Gilman Foundation application portal!

You have been assigned a username and **the link below will allow you to create your own password**. Please use this credential when you login at <https://howardgilmanfoundation.fluxx.io> to start the application process.

* Password: Click on the following **link** to set your own password (do not input the following term as your password): <https://howardgilmanfoundation.fluxx.io/token/0343223d2c8c0e178683f76592d471d6d5e77e4e13f176f20e>

* Username: yourorganization@your.org

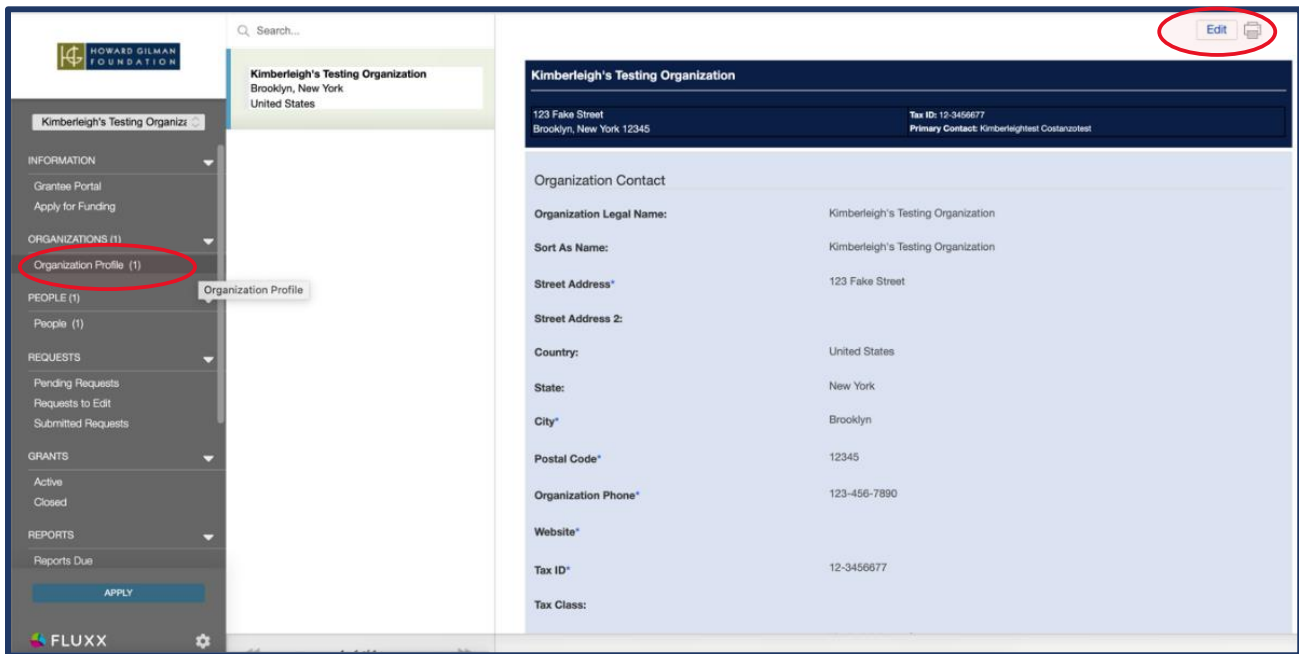
When you log in, please take some time to complete your Organization Profile available on the left-hand side of the portal page. More information about the Grants Portal and upcoming application cycles can be found on our website: www.howardgilmanfoundation.org.

If you have any difficulty logging in or questions about the application process, please contact us at grants@howardgilmanfoundation.org. Thank you!

Fill in "Organization Profile"

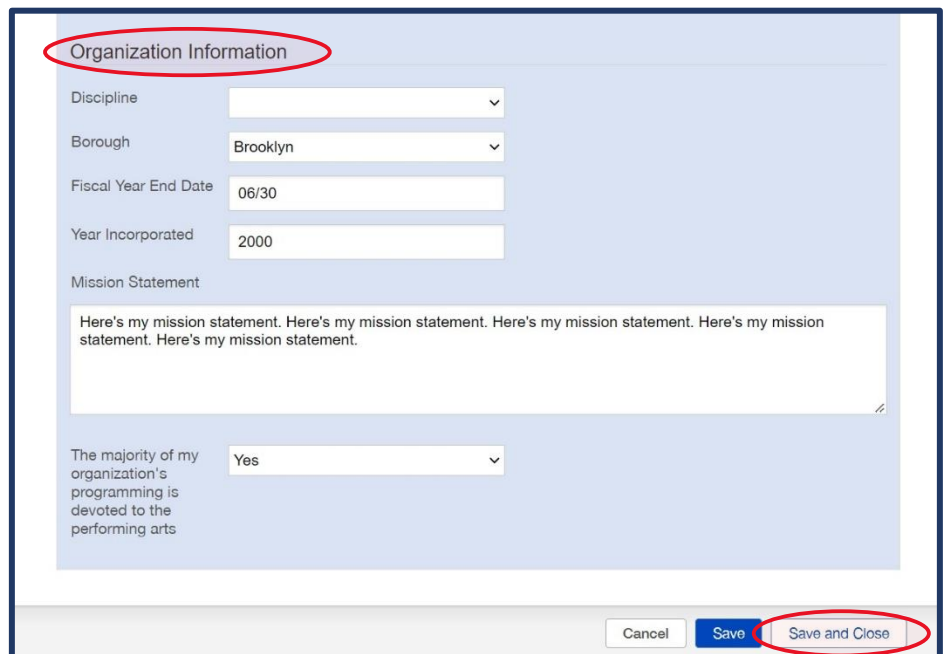
Once you create the password of your choice, return to the Fluxx login page at howardgilmanfoundation.fluxx.io to sign in.

Navigate to the **Organization Profile** section within the left-side menu. Click **Edit** in the upper right-hand corner.



Complete the **Organization Information** questions and click **Save and Close** once complete.

This profile should be complete before submitting a request. You'll only ever need to update this section if the answer to one of these questions changes.

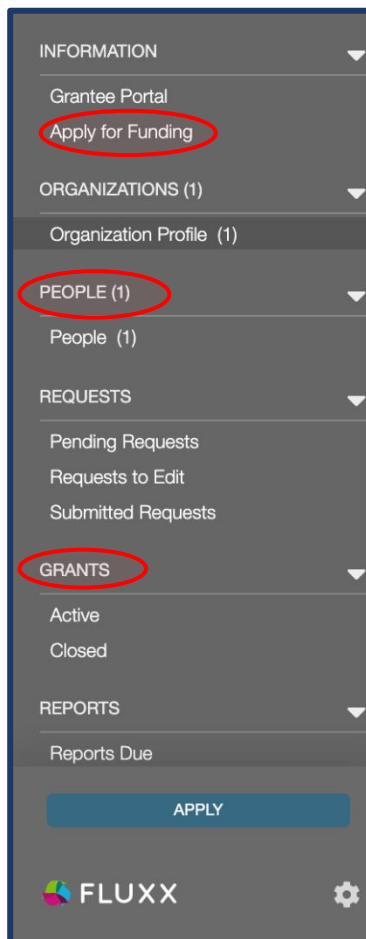


Navigating the Menu

You can use the left-side menu to:

- view and add contacts (in the People section)
- view active requests (in the Requests section)
- view active and closed past grants (in the Grants section)
- view active and close reports (in the Reports section)
- once available, open and submit requests for funding (in the Apply for Funding section)

The request forms for funding are only open during windows of time outlined here: howardgilmanfoundation.org/dates



Contact Types

Please note you may need to add multiple staff members to your profile.

When submitting applications or new registrations, we ask you to designate a Grant Contact and an Executive Leader contact.

The Grant Contact is the member of your staff we should be in touch with to answer questions about the application and schedule any future meetings or conversations, such as a member of the development staff.

The Executive Leader Contact, such as an Executive Director, is the staff member that should be addressed in any future award letters and should act as the signatory for any grant contracts.

Updating Contacts

We know that staff changes happen throughout the year. When someone leaves the organization, please notify your Program Officer of the departure and please don't overwrite names in the system. All new staff should be added to the people section in the grants portal. Your PO and the grant team will ensure that the right people are archived within our system.

If the new Grant Contact or Executive Leader will be logging into the grants portal, reviewing or submitting grant materials, and/or receiving future email notifications, have the new contact

- click the "Create an Account Now" button from the button right corner of the [main login screen of the grants portal](#) and follow the same registration process outlined on page 1 of this guide.
- Once submitted, we will connect the new contact to your organization's existing record.

If the new contact won't be logging into the grants portal but you want to list them on grant materials as the grant contact or Executive Leader contact, then please have the primary user:

- [log in to the grants portal](#)
- click "People" from the left side menu
- click the "Create New User" button on the bottom right of the screen.
- Add the contact information for the new contact (so they can receive notifications) without giving them a login to the system.

As a reminder, notification emails are only sent to the Grant Contact and Executive Leader contact that your organization designates on your grant applications, regardless of other users connected to your organization.