

### STEP ONE:

#### Set Up an Account to Access the Fluxx Grant Portal

1. Log on to <http://hillman.fluxx.io> to create a grantee account, or if you are a returning user, please login with your username and password. For optimal functionality, use Fluxx with your Google Chrome browser.

If you have already registered your organization through our portal, You can login with your username and password. If you have forgotten your username and/or password, please contact us.

If your organization has already registered with us, but you have not individually, please contact us. We will add you to your organization's contacts internally.

If you have been invited to apply, please refer to the email sent to you. which provides your username and password. **Please do not register multiple times.**

Contact us with any questions or concerns regarding registration at [kabarron@hillmanfo.com](mailto:kabarron@hillmanfo.com), or by calling 412-338-3467.

2. If you are creating a new account you will be directed to the Application and Grant Information page. Here, you will need to answer the eligibility questionnaire to determine if you qualify to apply with the Hillman Family Foundations. Respond yes or no, then click submit.

Application and Grant Information

Login Now:

Username

Password

[Reset or create password](#)

If you are new to the Hillman Family Foundations' Grant Portal, click the "Create an account now" button to check your eligibility and register in our system.

powered by **FLUXX**

Application and Grant Information

Eligibility Questionnaire

Is your organization recognized by the Internal Revenue Service as having a 501(c)(3) status? If you are federally tax exempt for other reasons, please contact the foundation at 412-338-3466.

Do you serve one of the following geographic areas? Boulder, CO area; Squam Lakes, NH area; New Hampshire area; Los Angeles, CA area; New York City, NY area; Portland, OR area; San Francisco, CA area; Santa Barbara, CA area; or Southwestern Pennsylvania area

Have you read our eligibility requirements on our website?

3. If you meet eligibility requirements, you will be directed to fill out the Organization Information form. This information will be kept on file for future grants from your organization.

Organization Information

**Organization Name**

Address 1

Address 2

City

Country

State/Province

Postal Code (Zip)

Organization E-mail

Organization Phone

Website

Tax ID/EIN

Organization Budget

Fiscal Year End Date

Organization Mission

4. At the bottom of the page, you will find a section titled Personal Contact Information. Please fill out the information for the contact for this grant. It is best if this person is a permanent employee of your organization, as they will be our primary contact throughout the grant-making process.

Personal Contact Information

**First Name**

**Last Name**

**Title**

**Work Phone**

**E-mail**

### STEP 2:

### Accessing and Navigating the Grant Portal

5. After submitting your request, we at Hillman Family Foundations will review your application to determine whether your organization meets our guidelines. Once approved, you will receive an email notification with your assigned username and password. This will allow you to login to the Grant Portal.
6. Once logged in, you will see the welcome screen. From here, you can begin the grant application process. The menu runs along the left side, including your organization's information, your past and present requests, your grant history, all interim and final reports, and your grant payment schedule.

The menu inside the Grant Portal allows you to access your request and grants in all stages of the grant-making process.

You are also able to set your own password once logged in by selecting "Change Password" at the bottom of the menu screen.

7. On the home screen under Information, you will see the option to apply to one of the 18 Hillman Family Foundations, or the Opportunity Fund. Please visit our website [www.hillmanfamilyfoundations.org](http://www.hillmanfamilyfoundations.org) to determine which fund applies to your project and/or organization.

The screenshot displays the FLUXX Grant Portal interface. On the left is a dark sidebar menu with the following categories and sub-items:

- Information
  - Welcome
- Organizations
  - My Organizations
- People
  - My Contact Information
- Requests
  - Draft Requests
  - Requests to Edit
  - Submitted Requests
  - Declined Requests
- Grants
  - Active
  - Closed
- Reports
  - Reports Due
  - Submitted Reports
  - Reports to edit
- Payments
  - Scheduled Payments
  - Awaiting Acknowledge...
  - Acknowledgment Recei...
  - Audit Confirmation

At the bottom of the sidebar are the options "Change Password" and "Logout".

The main content area is white and features a "Printable" button in the top right corner. The heading reads "Welcome to the Hillman Family Foundations' Grant Portal". Below this, a list of actions is provided:

From this grant portal, you can:

- Update your organization and your own contact information
- Submit a proposal for funding
- Track the status of your pending proposal
- Review your current grants and report due dates
- Submit reports
- Monitor grant payments

Instructions follow: "Once you have read the guidelines for the areas the foundation funds\*, click on the button below for the appropriate funding opportunity to begin your application. You may save your proposal to continue editing at a later time." and "When done editing, always 'Save' your request using the button at the top before returning to the main page. This ensures you can return to continue editing. Only click the 'Submit' button when the page is complete. Once you submit, you will no longer be able to edit."

Two buttons are provided for application: "Start Grant Application" (for Hillman Family Foundations) and "Start Opportunity Fund Grant" (for Opportunity Fund). A note at the bottom states: "\*If you have questions for which application to choose, please see our [website](#)."

When done editing, always "Save" your request using the button at the top before returning to the main page. This ensures you can return to continue editing. Only click the "Submit" button when the page is complete. Once you submit, you will no longer be able to edit.

If you are applying to one of the [Hillman Family Foundations](#), please go here:

Start Grant Application

If you are applying to the **Opportunity Fund**, please start your application here:

Start Opportunity Fund Grant

\*If you have questions for which application to choose, please see our [website](#).

### STEP 3:

### Submitting a Grant Request through the Grant Portal

8. Once you have determined which foundation you are applying to, click the “Start Grant Application” button located on the Information screen. This directs you to our request form.

9. When filling out the form, please be sure to answer all fields, paying careful attention to the directions written in green text. Do not leave any drop down menus blank.

Request applications should be saved frequently to ensure no information is lost in the application process. This is done by clicking the green save button in the top right-hand corner. All applications must be saved before Fluxx allows you to submit a request.

Saving your application also allows you to log out of Fluxx and return to your application later by navigating to the Draft Requests folder on the main menu page. **Please do not start multiple drafts.**

Please be aware that some items from the drop down menus will require more information, and additional fields may appear within the application.

*Click "Edit" above to start filling out the proposal.*

*Once the proposal is complete, click "Save" and then "Submit". Please note that you will no longer be able to edit the proposal after submitting. Once submitted you will receive an email confirmation that your proposal has been received.*

Which foundation are you applying to?

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ORGANIZATION DETAILS

Organization	<input type="text" value="Hillman Family Foundations"/>
Location	<input type="text" value="Hillman Family Foundations - headquarters"/>
Primary Contact	<input type="text"/>
Primary Signatory	<input type="text"/>
Was the primary contact listed in the dropdown above?	<input type="text"/>
Was the signatory contact listed in the dropdown above?	<input type="text"/>

**After selecting and/or adding the Primary and Signatory Contact, click "Save" and then "Edit" to continue working on this request.**


- Once you have completed your grant request, make sure that you have filled in the Geographic Focus above the Project Summary. Please enter one geographic location that best describes the area your project serves.


If the request is for over \$5,000, also make sure that you have uploaded your Project Budget and Annual Operating Budget, located at the bottom of the form. Documents are added by clicking on the green plus sign button located next to request documents.

Once documents are uploaded, they may not be removed by anyone other than the Hillman Family Foundations staff. If you need a document removed from your application, please contact us.

- After your grant request is submitted, the Workflow status on the request will change to "In Review." Once a decision is made, your primary contact that is listed will be sent an email on the status of your grant if it is either approved or denied.

If any changes need to be made after your application is submitted, or if you need to update your contact or organizational information, please contact us at 412-338-3467, or by email at kabarron@hillmanfo.com.


 Please fill in the Geographic Focus before submitting your request.

Geographic Focus 

No Geographic Focus records have been added.

Please attach the following documents:

- Project Budget
- Annual Operating Budget

REQUEST DOCUMENTS 

Hillman Family Foundations

Audrey Hillman Fisher Foundation

\$1,234

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TEST GRANT

Status	In Review
Date Received:	1/18/2016
Which foundation are you applying to?	Audrey Hillman Fisher Foundation