

# Community Foundation

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**FOR SOUTHEAST MICHIGAN**

# GRANTEE PORTAL INSTRUCTIONS

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- Install Google Chrome Browser
- Log into the Grantee Portal
- Reset or Create a Password
- Overview of the Grantee Portal
- Helpful Tips
- Report Issues and Feedback

# INSTALL GOOGLE CHROME

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## Install Chrome on Windows



1. Download the [installation file](#).
2. If prompted, click Run or Save.
3. If you chose Save, double-click the download to start installing.
4. Start Chrome:
  - Windows 7: A Chrome window opens once everything is done.
  - Windows 8 & 8.1: A welcome dialog appears. Click Next to select your default browser.
  - Windows 10: A Chrome window opens after everything is done. You can [make Chrome your default browser](#).

If you've used a different browser, like Internet Explorer or Safari, you can [import your settings into Chrome](#).

# INSTALL GOOGLE CHROME

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## Install Chrome on Mac

1. Download the [installation file](#).
2. Open the file called "googlechrome.dmg."
3. In the window that opens, find Chrome .
4. Drag Chrome to the Applications folder.
  - You might be asked to enter the admin password.
  - If you don't know the admin password, drag Chrome to a place on your computer where you can make edits, like your desktop.
5. Open Chrome.
6. Open Finder.
7. In the sidebar, to the right of Google Chrome, click Eject .

# LOG INTO THE GRANTEE PORTAL

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## Applicant Registration

New applicants to the CFSEM or the DMC Foundation will first need to register with the respective foundation by going to one of the following links:

- General CFSEM: <https://cfsem.fluxx.io/apply/registration>
- DMC: <https://cfsem.fluxx.io/apply/dmc>

New students for CFSEM scholarships will need to register with the foundation by going to <https://cfsem.fluxx.io/apply/scholar>

# LOG INTO THE GRANTEE PORTAL

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## **Accessing the Portal for All Things Application or Grant Related (including Payments and Reports)**

When returning to start or complete an application, applicants will go to the following locations:

- CFSEM Applicants, Grantees and Students <https://cfsem.fluxx.io/>
- DMC Applicants and Grantees: <https://dmc.fluxx.io/>

# LOG INTO THE GRANTEE PORTAL

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If an applicant or grantee has applied to both foundations, they will need to select the foundation's portal they want to access as shown to the right.

Which Profile would you like to use?

☒ CFSEM Applicant

☐ DMC Applicant

Continue



[Privacy Policy](#) [Accessibility](#)

# RESET OR CREATE A PASSWORD

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Grants Portal

Login Now:

Sign in

[Reset or create password](#)

## New to the Grants Portal?

### Create Your Organizational Profile

Welcome. On this site you will be able to register your organization to apply for grants from the Community Foundation for Southeast Michigan and certain of our supporting organizations. Please note that the Community Foundation and its supporting organizations are separate legal entities each having separate grantmaking policies. The respective boards of each entity have the authority over the grants made by those organizations. When applying for grants, please review the grantmaking guidelines for the foundation to which you are applying. Thank you for all that you and your organization do to improve the quality of life in southeast Michigan.



[Privacy Policy](#) [Accessibility](#)

At Go-Live, existing applicants and grantees of either the CFSEM or the DMC Foundation will receive an email inviting them to create a password for their account. They will be directed to the respective portal and asked to click the link shown inside the green oval to the left.



# RESET OR CREATE A PASSWORD

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Grants Portal

Login Now:

Sign in

[Reset or create password](#)

## New to the Grants Portal?

### Create Your Organizational Profile

Welcome. On this site you will be able to register your organization to apply for grants from the Community Foundation for Southeast Michigan and certain of our supporting organizations. Please note that the Community Foundation and its supporting organizations are separate legal entities each having separate grantmaking policies. The respective boards of each entity have the authority over the grants made by those organizations. When applying for grants, please review the grantmaking guidelines for the foundation to which you are applying. Thank you for all that you and your organization do to improve the quality of life in southeast Michigan.

If an applicant, grantee, or student to either foundation has forgotten their password, it can be reset by clicking the link shown inside the green oval to the left.



[Privacy Policy](#) [Accessibility](#)

# RESET OR CREATE A PASSWORD

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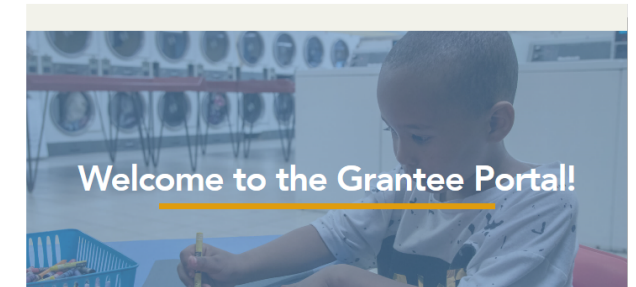
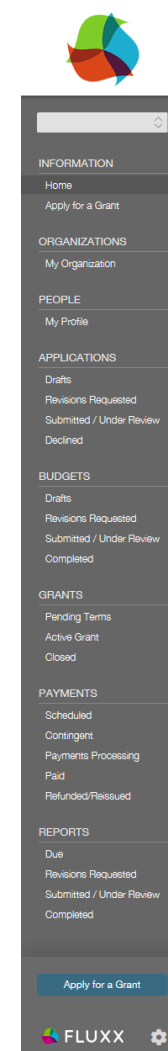
When prompted, enter your email address and you will shortly receive an email from the Community Foundation with a link to reset your password.

Once you set your password, you will be logged into the system.

# OVERVIEW OF THE GRANTEE PORTAL

The first page applicants, grantees, and students will see is a home page that will provide them with information about the site.

The links along the left side of the page and inside the gray bar are how visitors will navigate through the portal. Details about each of the sections are provided on the home page.



## How to Use the Portal

The icons on the left-hand side are called "cards". When you click on the link beneath each card, you can access the following:

### APPLICATIONS

#### **Drafts**

Once you have started an application, you can find the unsubmitted document here to complete.

#### **Revisions Requested**

If staff have any questions about your application or would like a revision, you will receive an email notification to login. You can find the application here for editing.

#### **Submitted/Under Review**

After submitting your application, it will appear here while staff reviews the application and supporting materials.

#### **Declined**

Unfortunately, the needs of the community exceed the Foundation's limited financial resources. Here is where you will find applications we have not been able to fund.

### BUDGETS

#### **Drafts**

Budgets you have started and saved during the application process can be found here should you need to edit them before submission.

#### **Revisions Requested**

If staff have any questions about your budget or would like a revision, you will receive an email notification to login. You can find the application here for editing.

# HELPFUL TIPS

## Updating the Organization Profile

Before starting a new application, make sure to visit the organization profile in the Grantee Portal to confirm the information is correct, including any *Organization Documents*, such as a copy of your most recent audit or an organization budget.

To update any profile information, follow the instructions at the top of the organization profile page. If you are updating any organization documents, refer to the instructions on the following page on how to upload a document in the grantee portal.

The screenshot displays the FLUXX Grantee Portal interface. On the left is a dark sidebar with a navigation menu containing sections like INFORMATION, ORGANIZATIONS, PEOPLE, APPLICATIONS, BUDGETS, GRANTS, PAYMENTS, and REPORTS. The main content area is titled 'Community Foundation for Southeast Michigan' and includes a search bar, organization details (Tax ID, address), and an 'Edit' button. Below this is an 'Instructions' section with steps for updating the profile. Further down is a 'Supporting Documentation' section with an upload button. At the bottom is the 'Organization Contact Information' section, which contains a form with fields for Legal Name, Popular Name, Acronym, and various address and contact details. An 'Update' button is located at the bottom right of the form.

Community Founda

INFORMATION  
Home  
Apply for a Grant

ORGANIZATIONS  
My Organization

PEOPLE  
My Profile

APPLICATIONS  
Drafts  
Revisions Requested  
Submitted / Under Review  
Declined

BUDGETS  
Drafts  
Revisions Requested  
Submitted / Under Review  
Completed

GRANTS  
Pending Terms  
Active Grant  
Closed

PAYMENTS  
Scheduled  
Contingent  
Payments Processing  
Paid  
Refunded/Reissued

REPORTS  
Due  
Revisions Requested  
Submitted / Under Review  
Completed

Apply for a Grant

FLUXX

Search...

Community Foundation for Southeast Michigan  
Tax ID: 38-2530980  
333 W Fort St Ste 2010  
Detroit, Michigan 48226-3134

Community Foundation for Southeast Michigan

Tax ID: 38-2530980  
333 W Fort St Ste 2010  
Detroit, Michigan 48226-3134

Instructions

Click **Edit** at the top of the form to update your organization profile. You can update certain details including the organization address, phone number, etc.

Changes to your organization legal name, address, and Tax ID (if applicable) must be approved by staff before it can be updated. To request changes, please follow these steps:

1. Click on **Edit** at the top of the form.
2. Describe the changes and attach any applicable supporting documentation (e.g. Letter for a legal name change).
3. Click **Save**.
4. Click **Request changes to restricted fields** at the bottom of the form.

What are the changes you need made to restricted fields?

Supporting Documentation

Organization Contact Information

Legal Name\* Community Foundation for Southeast Michigan

Popular Name:

Acronym:

Legally Certified DBA/Assumed Name\*: Community Foundation for Southeast Michigan

Address 1\*: 333 W Fort St Ste 2010

Address 2:

City\*: Detroit

Country\*: United States

State/Province\*: Michigan

Postal Code\*: 48226-3134

Update

# HELPFUL TIPS

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## Uploading Documents

Find the *Organization Documents* section of the organization profile. Details on the types of documents we need for the application process are listed in that section of the organization profile.

To start the upload, click on the blue plus sign next to one of the documents. Refer to the image to the right as an example.

IRS Federal Tax Exemption Letter or US Form W-9 for Non-Charities+

Board List with Affiliations+

Annual Report+

Organization Diversity Policy+

Most Recent Certified Financial Audit or Review+

Organizational Budget+

Organization Documents



# HELPFUL TIPS

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## Uploading Documents

A pop-up similar to the one at the right will appear. Click the *Add files* button in the lower left corner to start the process of selecting your document.

Upload files

Select or drag files then start upload

Filename

Size

Status

Drag files here.

Add files

Start upload

# HELPFUL TIPS

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## Uploading Documents

Use your computer's file management system to locate the document you want to attach. Once complete, you will return to this window and see your document in the list. The document type (*Board List* in the example to the right) will be auto-selected based on which blue plus you selected. If not, make sure you pick the appropriate document type from the drop down menu.

Upload files

Select or drag files then start upload

Filename

Size

Status

Untitled-1.png

Board List with Affiliations

29 KB

0%

Add files

Start upload

29 KB

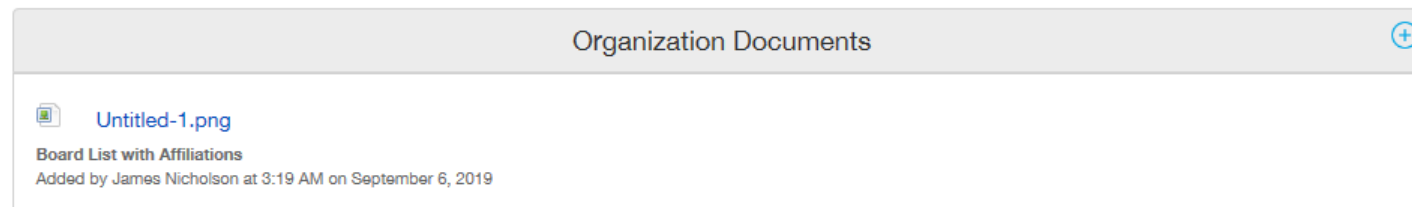
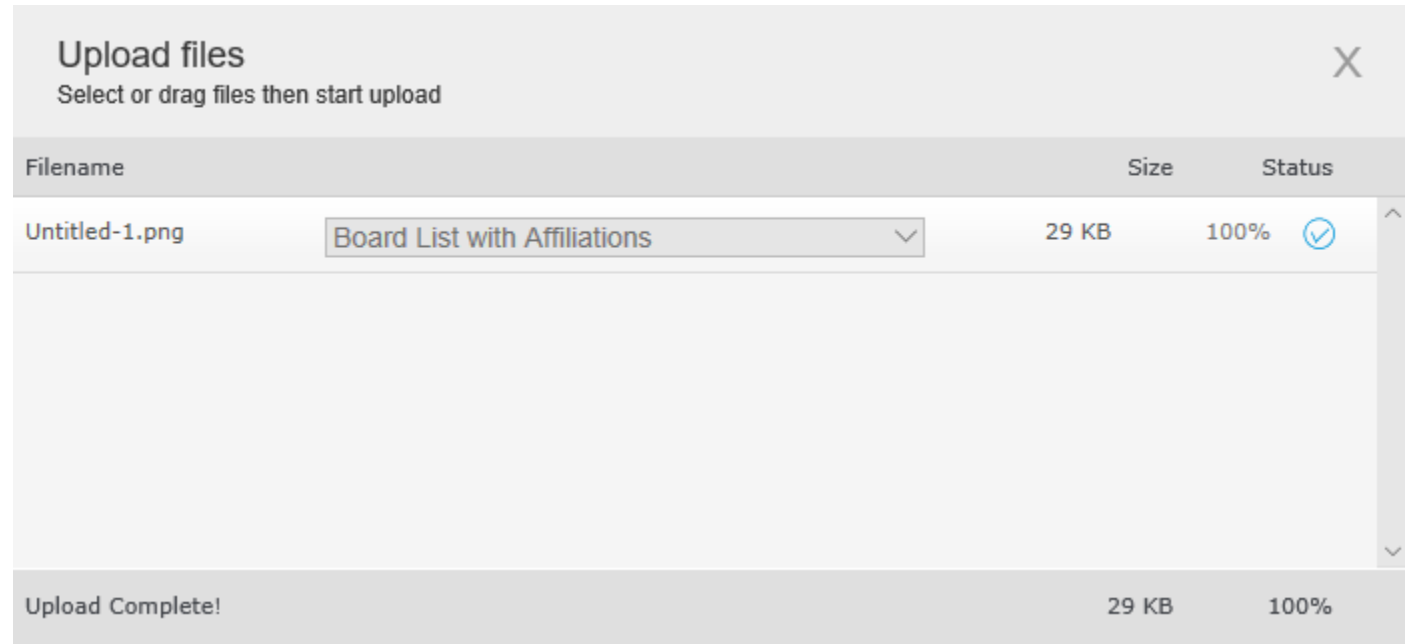
0%

# HELPFUL TIPS

## Uploading Documents

When you are ready, click the *Start Upload* button. Once the process is complete, you will receive a confirmation as shown in the image to the right.

On the organization profile, you will see the document listed at the bottom of the page. See the image below.





# HELPFUL TIPS

## Uploading Documents

If you are adding a new version of a document already uploaded, make sure you locate the document in the list of items and select the icon for "Add New Version of Document". You can see it in the image to the right. It appears as a table with a green arrow point up. Once you click on it, locate the new document using your computer's file management system and complete the step. After selecting the document, the new item will replace the old one in the grantee portal.

When the organization profile and all the documents are updated, you can start a new application.

### Organization Documents

Click on the + button next to each document to upload the file. PDF document types are preferred.

Annual Report+

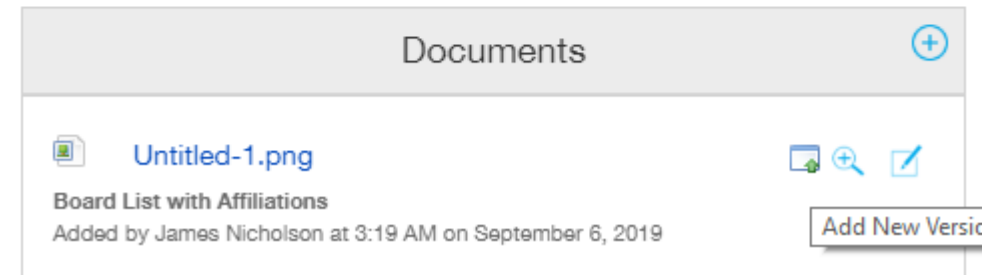
IRS Federal Tax Exemption Letter or US Form W-9 for Non-Charities+

Organization Diversity Policy+

Most Recent Certified Financial Audit or Review+

Legally Certified DBA/Assumed Name Document+

Organizational Budget+

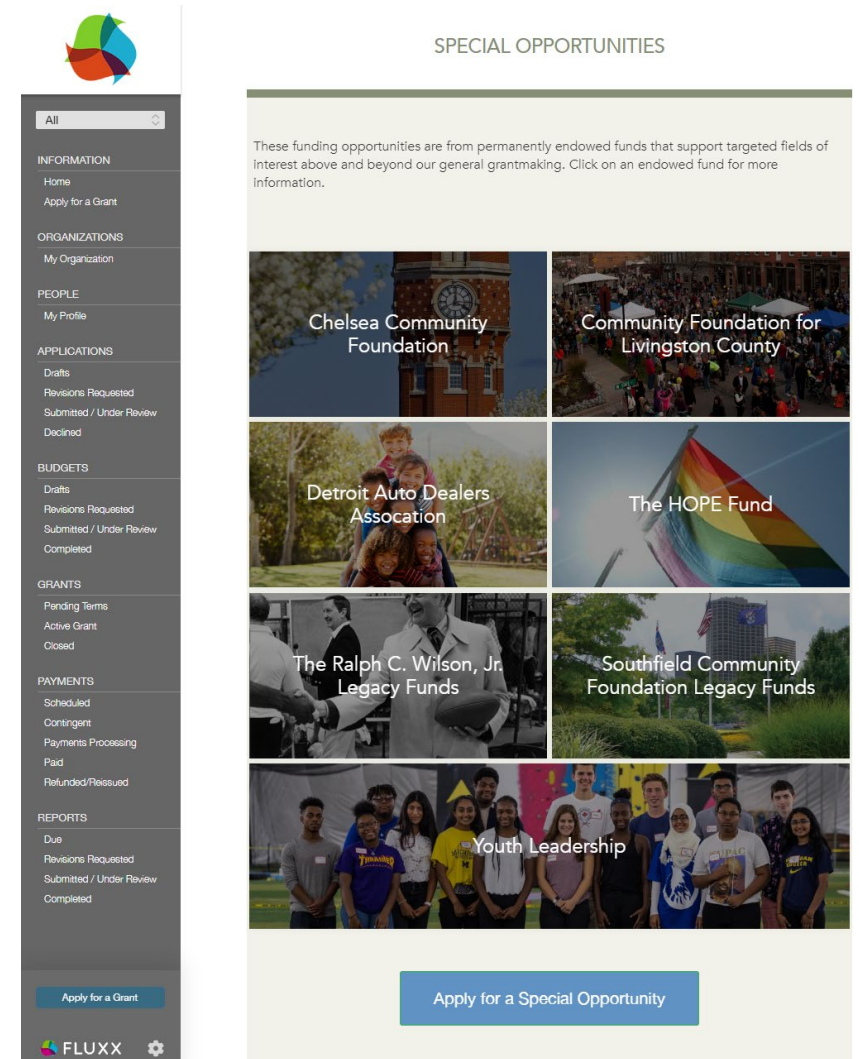


# HELPFUL TIPS

## New Applications

To start a new application, click on the *Apply for a Grant* link in the navigation bar of the blue button at the bottom of the navigation panel.

A page detailing the opportunities available at the CFSEM or the DMC will appear. See an example in the image to the right. From there, click on the appropriate button to start your application.



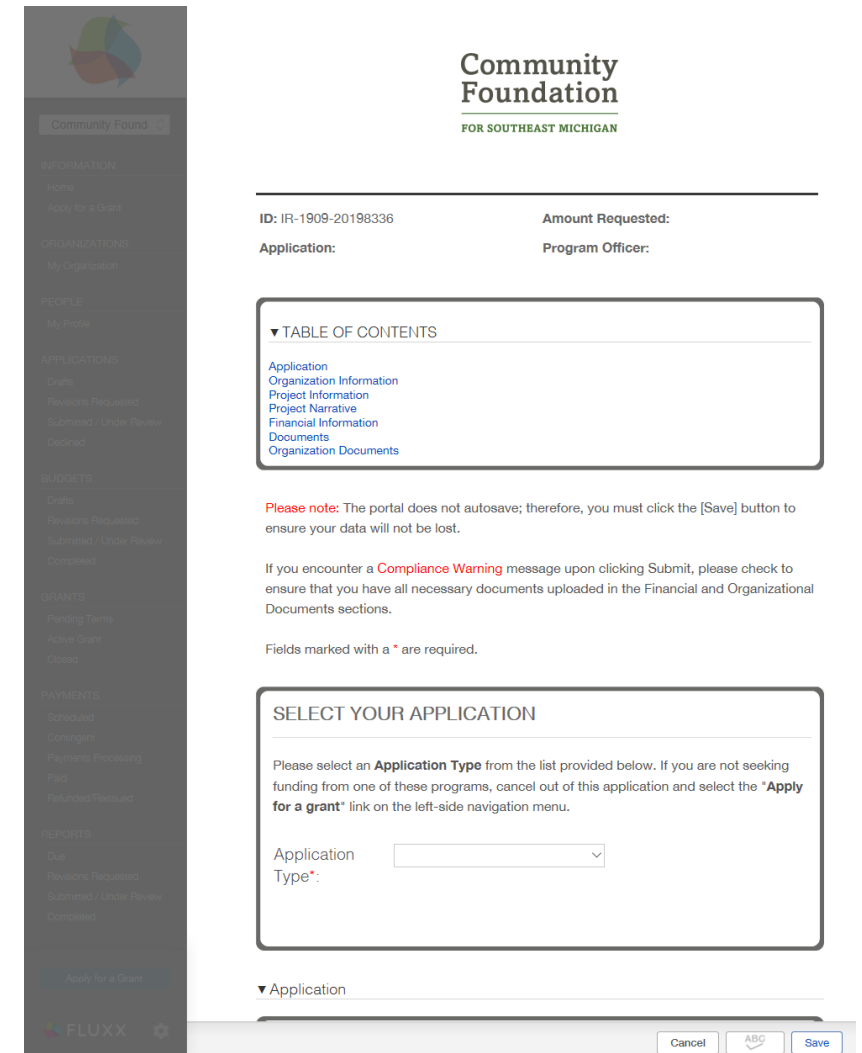
# HELPFUL TIPS

## Tips While Applying

*Bottom Right of the Application at the Start or During Edit*

- Cancel: click  to cancel any changes you have made and exit edit mode
- Spell Check: click  to perform spell check
- Save: click  to record any changes you have made.

**NOTE:** There is no auto-save, so please remember to save often.



The screenshot displays the Community Foundation application portal. On the left is a dark sidebar with a navigation menu including sections like INFORMATION, ORGANIZATION, PEOPLE, APPLICATIONS, SUBJECTS, GRANTS, PAYMENTS, and REPORTS. The main content area features the Community Foundation logo at the top, followed by application details such as ID (IR-1909-20198336) and Amount Requested. Below this is a 'TABLE OF CONTENTS' section with links to various application components. A 'Please note' warning states that the portal does not autosave. Another note mentions a 'Compliance Warning' related to document uploads. A section titled 'SELECT YOUR APPLICATION' contains a dropdown menu for 'Application Type\*'. At the bottom right, there are 'Cancel', 'ABC' (spell check), and 'Save' buttons.

# HELPFUL TIPS

## Tips While Applying

*Returning to Edit and Submit/Withdraw an Application*

1. Login to the Grantee Portal
2. Navigate to the *Drafts* section found under the *Applications* heading in the left side navigation
3. Find the application you wish to edit or submit/withdraw and click on it
4. In the upper right corner, you will see an [Edit](#) which you will need to click to make any changes to the application

The screenshot displays the FLUXX application portal. On the left is a dark sidebar with a navigation menu. The main content area shows the details of a specific application.

**Left Sidebar Navigation:**

- Community Found
- INFORMATION
  - Home
  - Apply for a Grant
- ORGANIZATIONS
  - My Organization
- PEOPLE
  - My Profile
- APPLICATIONS
  - Drafts
  - Revisions Requested
  - Submitted / Under Review
  - Declined
- BUDGETS
  - Drafts
  - Revisions Requested
  - Submitted / Under Review
  - Completed
- GRANTS
  - Pending Terms
  - Active Grant
  - Closed
- PAYMENTS
  - Scheduled
  - Contingent
  - Payments Processing
  - Paid
  - Refunded/Reissued
- REPORTS
  - Due
  - Revisions Requested
  - Submitted / Under Review
  - Completed

[Apply for a Grant](#)

FLUXX

**Main Content Area:**

Search...

Community Foundation for Southeast Michigan  
IR-1909-20198334

Amount Requested:  
Status: Draft

[Edit](#)

**Community Foundation**  
FOR SOUTHEAST MICHIGAN

Community Foundation for Southeast Michigan

ID: IR-1909-20198334      Amount Requested:  
Application:      Program Officer:

**TABLE OF CONTENTS**

- Application
- Organization Information
- Project Information
- Project Narrative
- Financial Information
- Documents
- Organization Documents

**SELECT YOUR APPLICATION**

Please select an **Application Type** from the list provided below. If you are not seeking funding from one of these programs, cancel out of this application and select the "Apply for a grant" link on the left-side navigation menu.

Application Type\*

**Application**

**I. ORGANIZATION INFORMATION**


Please review your organization information below, including key contact information, mission and vision, and other noted items. If any updates need to be made,

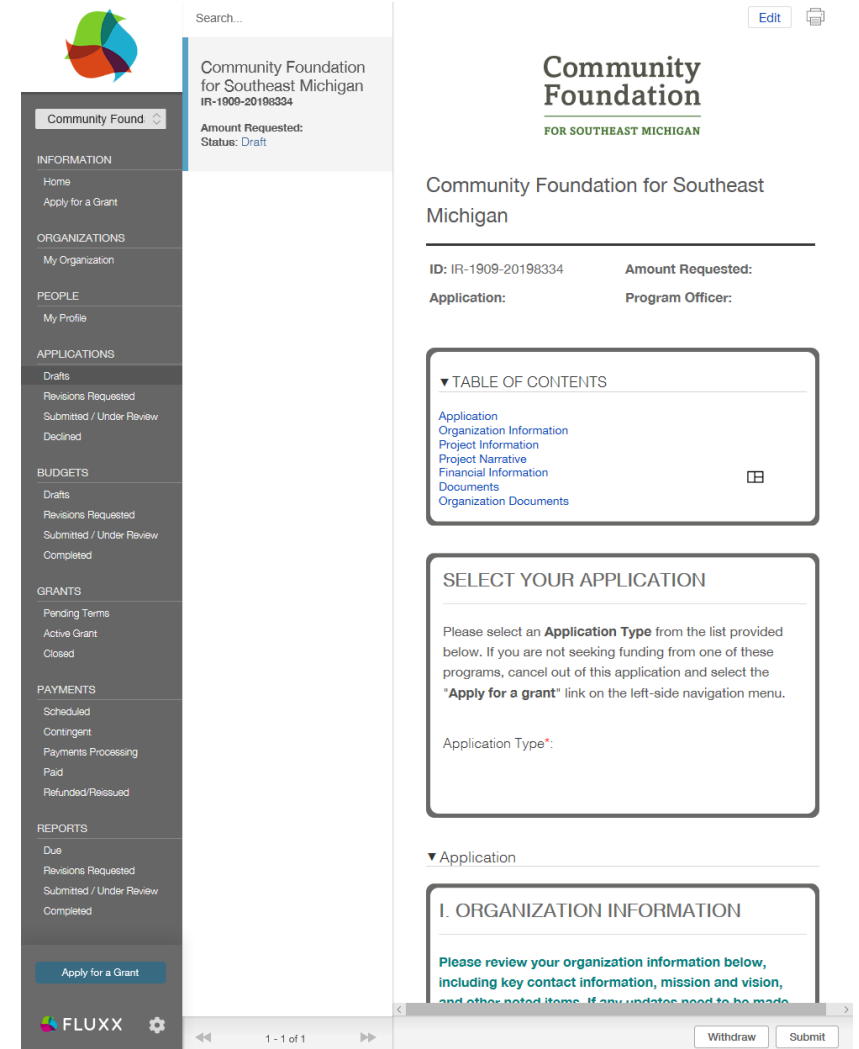
[Withdraw](#) [Submit](#)

# HELPFUL TIPS

## Tips While Applying

*Returning to Edit and Submit/Withdraw an Application*

If you want to print a copy of the application, click on the printer  and a printer-friendly page containing the application will appear. Using your browser's print function to print this document should you wish.



The screenshot displays the FLUXX application interface. On the left is a dark sidebar with a navigation menu. The main content area shows the application details for the 'Community Foundation for Southeast Michigan' (ID: IR-1909-20198334). The status is 'Draft'. A 'TABLE OF CONTENTS' section is visible, listing various application components. Below this is a 'SELECT YOUR APPLICATION' section with instructions to choose an application type. The bottom of the page features a 'FLUXX' logo, a settings gear, and navigation controls.

**Community Found**

Search...

Community Foundation for Southeast Michigan  
IR-1909-20198334

Amount Requested:  
Status: Draft

**Community Foundation**  
FOR SOUTHEAST MICHIGAN

Community Foundation for Southeast Michigan

ID: IR-1909-20198334 Amount Requested:  
Application: Program Officer:

▼ TABLE OF CONTENTS

Application  
Organization Information  
Project Information  
Project Narrative  
Financial Information  
Documents  
Organization Documents

SELECT YOUR APPLICATION

Please select an **Application Type** from the list provided below. If you are not seeking funding from one of these programs, cancel out of this application and select the "Apply for a grant" link on the left-side navigation menu.

Application Type\*

▼ Application

I. ORGANIZATION INFORMATION

Please review your organization information below, including key contact information, mission and vision, and other noted items. If any updates need to be made,

FLUXX

1 - 1 of 1

Withdraw Submit

# HELPFUL TIPS

## Tips While Applying

*Returning to Edit and Submit/Withdraw an Application*

If you need to upload documents not related to the organization, but required as noted in the application, refer to the *Uploading Documents* section and follow those steps here.

The screenshot displays the FLUXX application interface. On the left is a dark sidebar with a navigation menu. The main content area shows the application details for the 'Community Foundation for Southeast Michigan' (ID: IR-1909-20198334). The application status is 'Draft'. Below this, there is a 'TABLE OF CONTENTS' section with links to 'Application', 'Organization Information', 'Project Information', 'Project Narrative', 'Financial Information', 'Documents', and 'Organization Documents'. A 'SELECT YOUR APPLICATION' section prompts the user to choose an 'Application Type'. Below that, the 'I. ORGANIZATION INFORMATION' section is visible, with a note to review organization information. At the bottom right, there are 'Withdraw' and 'Submit' buttons.

Search...

Community Found

Community Foundation for Southeast Michigan  
IR-1909-20198334  
Amount Requested:  
Status: Draft

INFORMATION  
Home  
Apply for a Grant

ORGANIZATIONS  
My Organization

PEOPLE  
My Profile

APPLICATIONS  
Drafts  
Revisions Requested  
Submitted / Under Review  
Declined

BUDGETS  
Drafts  
Revisions Requested  
Submitted / Under Review  
Completed

GRANTS  
Pending Terms  
Active Grant  
Closed

PAYMENTS  
Scheduled  
Contingent  
Payments Processing  
Paid  
Refunded/Reissued

REPORTS  
Due  
Revisions Requested  
Submitted / Under Review  
Completed

Apply for a Grant

FLUXX

Community Foundation  
FOR SOUTHEAST MICHIGAN

Community Foundation for Southeast Michigan

ID: IR-1909-20198334 Amount Requested:  
Application: Program Officer:

▼ TABLE OF CONTENTS

Application  
Organization Information  
Project Information  
Project Narrative  
Financial Information  
Documents  
Organization Documents

SELECT YOUR APPLICATION

Please select an **Application Type** from the list provided below. If you are not seeking funding from one of these programs, cancel out of this application and select the "Apply for a grant" link on the left-side navigation menu.

Application Type\*

▼ Application

I. ORGANIZATION INFORMATION

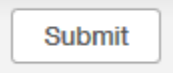
Please review your organization information below, including key contact information, mission and vision, and other noted items. If any updates need to be made,

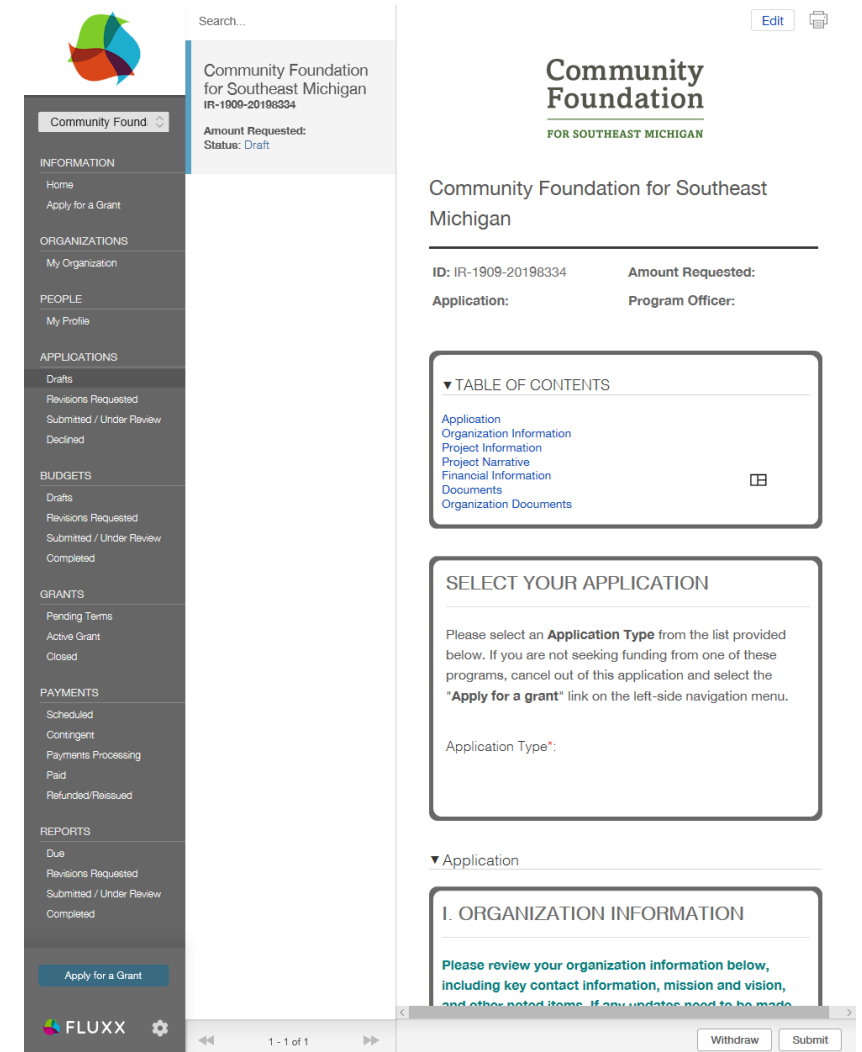
Withdraw Submit

# HELPFUL TIPS

## Tips While Applying

*Returning to Edit and Submit/Withdraw an Application*

Once you have completed all the required fields and uploaded all of your attachments, you are ready to *Submit* the application. Locate the  in the bottom right corner and follow the instructions to send your application to the foundation.



The screenshot displays the FLUXX application portal interface. On the left is a dark sidebar with a navigation menu containing categories like INFORMATION, ORGANIZATIONS, PEOPLE, APPLICATIONS, BUDGETS, GRANTS, PAYMENTS, and REPORTS, each with sub-links. The main content area at the top shows the organization's name, ID (IR-1909-20198334), and application status (Draft). Below this is a 'TABLE OF CONTENTS' section with links to various application components. A 'SELECT YOUR APPLICATION' section prompts the user to choose an application type. The bottom section, 'I. ORGANIZATION INFORMATION', contains instructions to review organization details. At the bottom right, 'Withdraw' and 'Submit' buttons are visible.

# HELPFUL TIPS

## Tips While Applying


*Returning to Edit and Submit/Withdraw an Application*

If you decide during the process to withdraw this application from consideration, click on the button in the bottom right corner of the application screen.

Withdraw

The screenshot displays the FLUXX application interface. On the left is a dark sidebar with a navigation menu. The main content area shows the application details for the 'Community Foundation for Southeast Michigan' (ID: IR-1909-20198334). The application status is 'Draft'. A 'TABLE OF CONTENTS' section lists various application components. Below this is a 'SELECT YOUR APPLICATION' section with instructions to choose an application type. The 'I. ORGANIZATION INFORMATION' section is partially visible at the bottom. In the bottom right corner, there are two buttons: 'Withdraw' and 'Submit'.

Search...

Community Found: 

Community Foundation for Southeast Michigan  
IR-1909-20198334

Amount Requested:  
Status: Draft

INFORMATION  
Home  
Apply for a Grant

ORGANIZATIONS  
My Organization

PEOPLE  
My Profile

APPLICATIONS  
Drafts  
Revisions Requested  
Submitted / Under Review  
Declined

BUDGETS  
Drafts  
Revisions Requested  
Submitted / Under Review  
Completed

GRANTS  
Pending Terms  
Active Grant  
Closed

PAYMENTS  
Scheduled  
Contingent  
Payments Processing  
Paid  
Refunded/Reissued

REPORTS  
Due  
Revisions Requested  
Submitted / Under Review  
Completed

Apply for a Grant

FLUXX

Community Foundation  
FOR SOUTHEAST MICHIGAN

Community Foundation for Southeast Michigan

ID: IR-1909-20198334 Amount Requested:  
Application: Program Officer:

▼ TABLE OF CONTENTS

Application  
Organization Information  
Project Information  
Project Narrative  
Financial Information  
Documents  
Organization Documents

SELECT YOUR APPLICATION

Please select an **Application Type** from the list provided below. If you are not seeking funding from one of these programs, cancel out of this application and select the "Apply for a grant" link on the left-side navigation menu.

Application Type\*:

▼ Application

I. ORGANIZATION INFORMATION

Please review your organization information below, including key contact information, mission and vision, and other noted items. If any updates need to be made,

Withdraw Submit



# REPORTING ISSUES AND FEEDBACK

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If any applicants, grantees, or students have issues with the portal, please have them send an email to [applications@cfsem.org](mailto:applications@cfsem.org). Be sure to include details about what is happening, including any application/grant numbers, user account information, and screen captures, if available.

Staff having difficulty with the site should contact the grants manager or submit a support ticket through Fluxx using the ticketing system in place. For instructions on how to complete the latter, please refer to the procedures document.