

Community Foundation

FOR SOUTHEAST MICHIGAN

GRANTEE PORTAL INSTRUCTIONS

- 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

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

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

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

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

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](#)



RESET OR CREATE A PASSWORD



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.

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.



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

RESET OR CREATE A PASSWORD



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



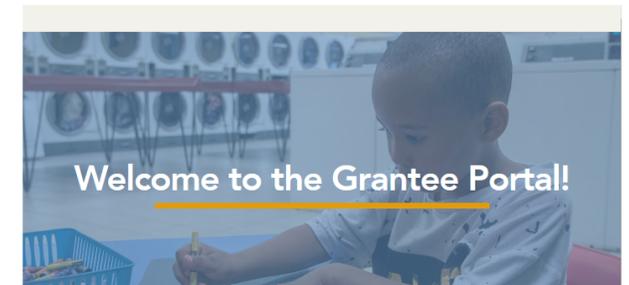
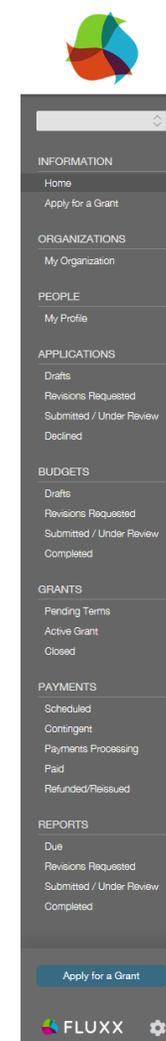
When prompted, enter your email address and you will shortly receive an email from the Community Foundation with a link to reset your password.

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 menu with categories: 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), and REPORTS (Due, Revisions Requested, Submitted / Under Review, Completed). At the bottom of the sidebar is an 'Apply for a Grant' button and the FLUXX logo.

The main content area shows the organization profile for 'Community Foundation for Southeast Michigan'. At the top right, there is a search bar, an 'Edit' button, and a print icon. The profile information includes: Tax ID: 38-2530980, 333 W Fort St Ste 2010, Detroit, Michigan 48226-3134. Below this is an 'Instructions' section with the following text: '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.' Below the instructions is a section titled 'What are the changes you need made to restricted fields?' and a 'Supporting Documentation' upload area with a plus icon.

The 'Organization Contact Information' section contains the following details: Legal Name: Community Foundation for Southeast Michigan; Popular Name: (blank); Acronym: (blank); Legally Certified DBA/Assumed Name: Community Foundation for Southeast Michigan; Address 1: 333 W Fort St Ste 2010; Address 2: (blank); City: Detroit; Country: United States; State/Province: Michigan; Postal Code: 48226-3134. At the bottom right of the profile page is an 'Update' button.

HELPFUL TIPS

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](#)+

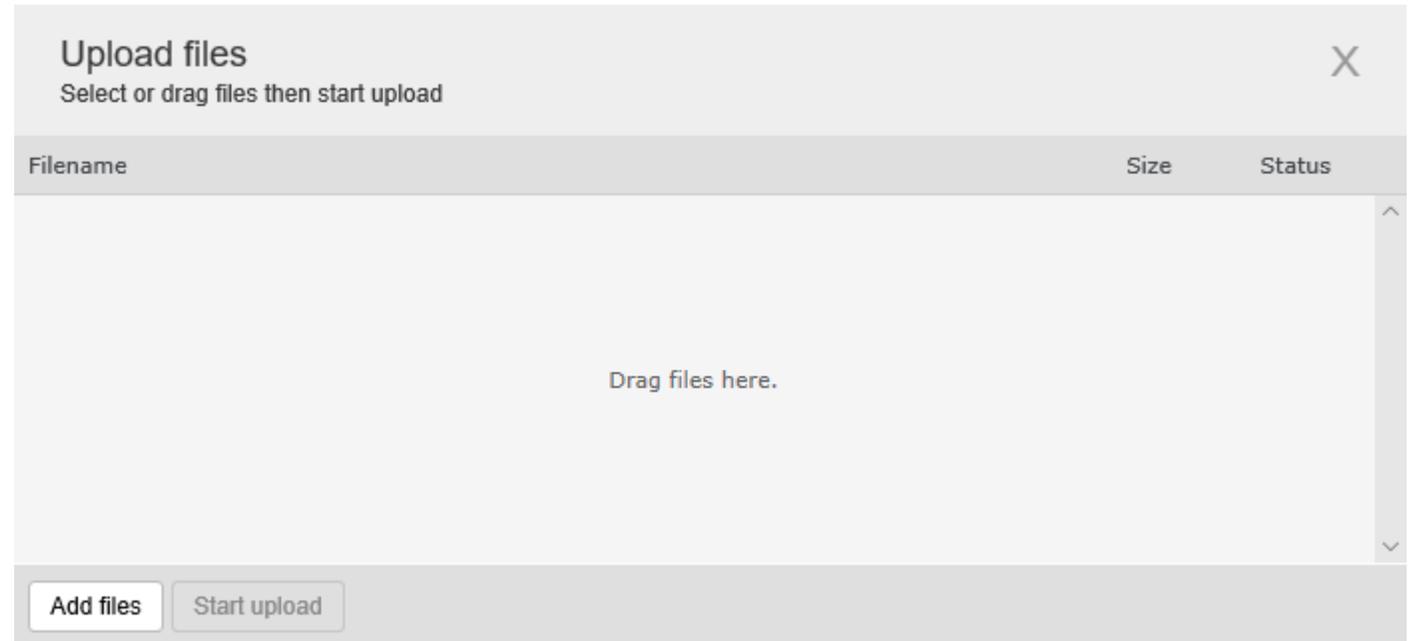
Organization Documents



HELPFUL TIPS

Uploading Documents

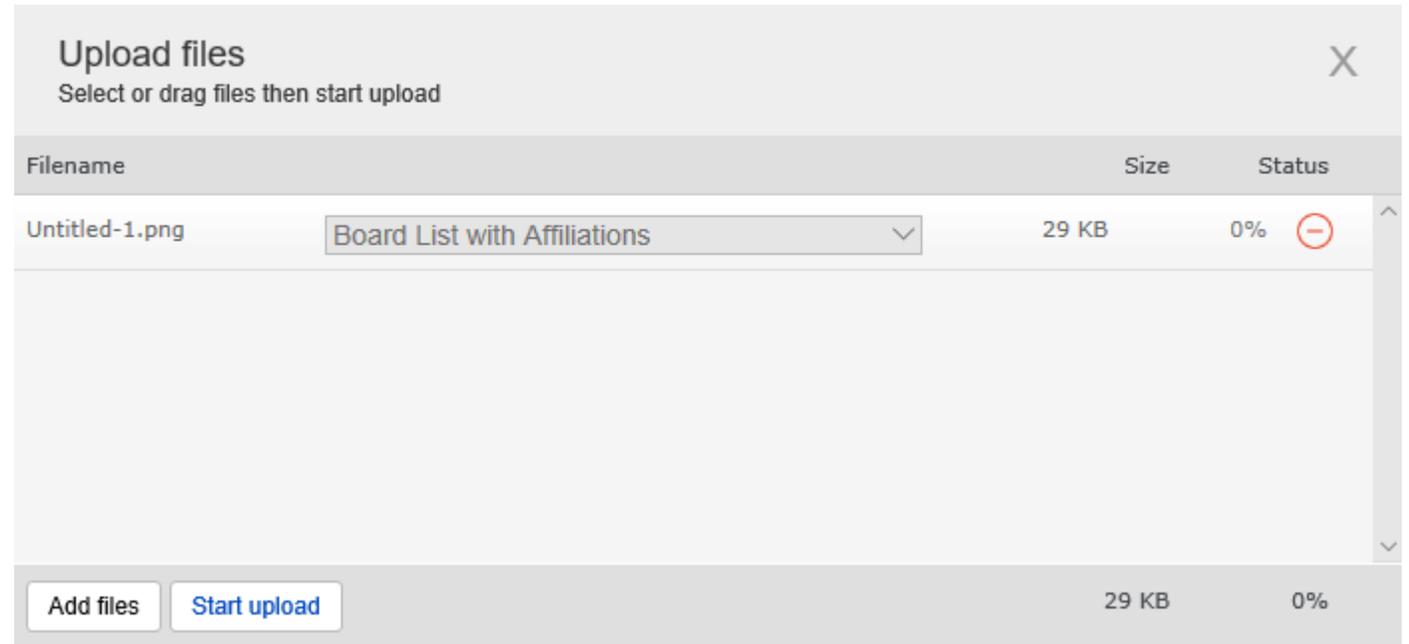
A pop-up similar to the one at the right will appear. Click the *Add files* button in the lower left corner to start the process of selecting your document.



HELPFUL TIPS

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.

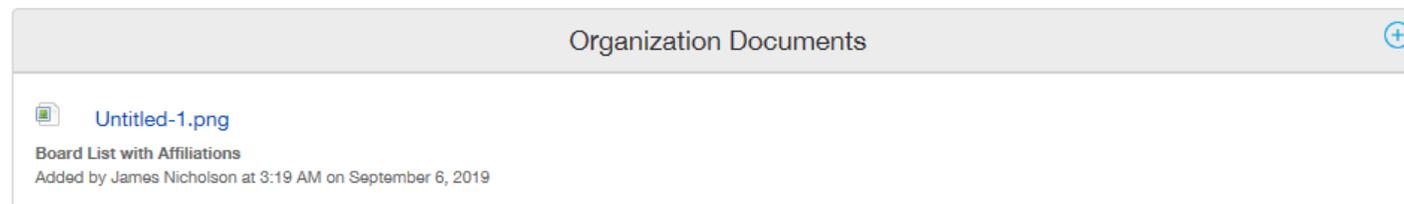
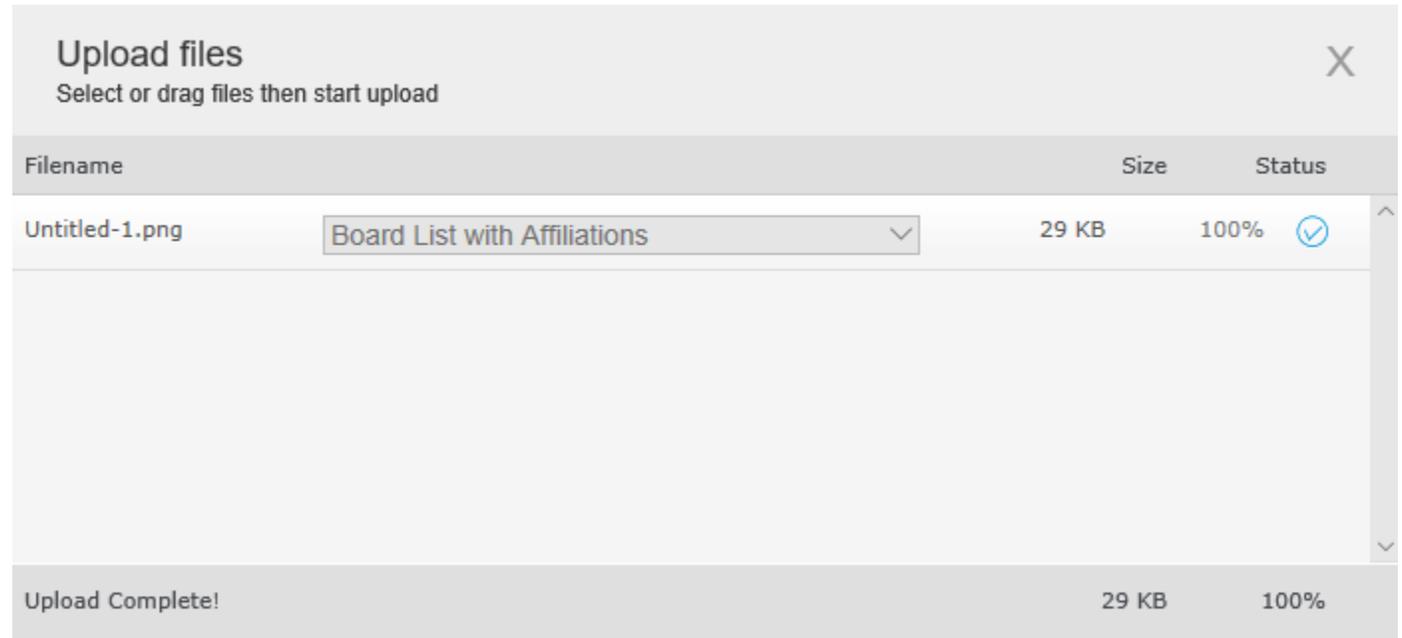


HELPFUL TIPS

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+

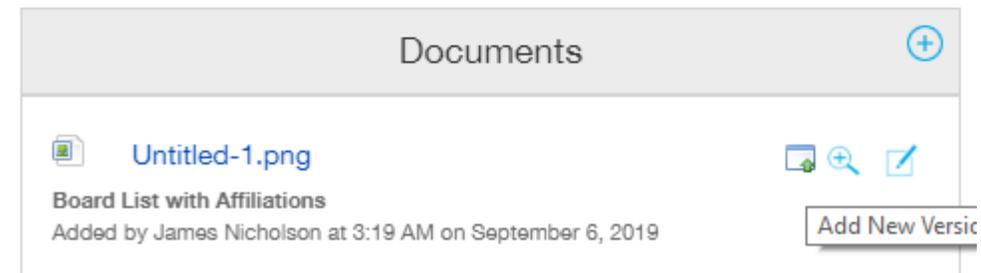
IRS Federal Tax Exemption Letter or US Form W-9 for Non-Charities+

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.

The image shows a screenshot of the FLUXX application portal. On the left is a dark navigation sidebar with a logo at the top. The sidebar contains a search bar with 'All' and a list of categories: 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/Issued), and REPORTS (Due, Revisions Requested, Submitted / Under Review, Completed). At the bottom of the sidebar is an 'Apply for a Grant' button and the FLUXX logo with a settings icon.

The main content area is titled 'SPECIAL OPPORTUNITIES'. It features a header with the text: 'These funding opportunities are from permanently endowed funds that support targeted fields of interest above and beyond our general grantmaking. Click on an endowed fund for more information.' Below this is a grid of six opportunity cards, each with a photo and a title: Chelsea Community Foundation, Community Foundation for Livingston County, Detroit Auto Dealers Association, The HOPE Fund, The Ralph C. Wilson, Jr. Legacy Funds, and Southfield Community Foundation Legacy Funds. At the bottom of the grid is a 'Youth Leadership' card. At the bottom of the page is a large blue button labeled 'Apply for a Special Opportunity'.

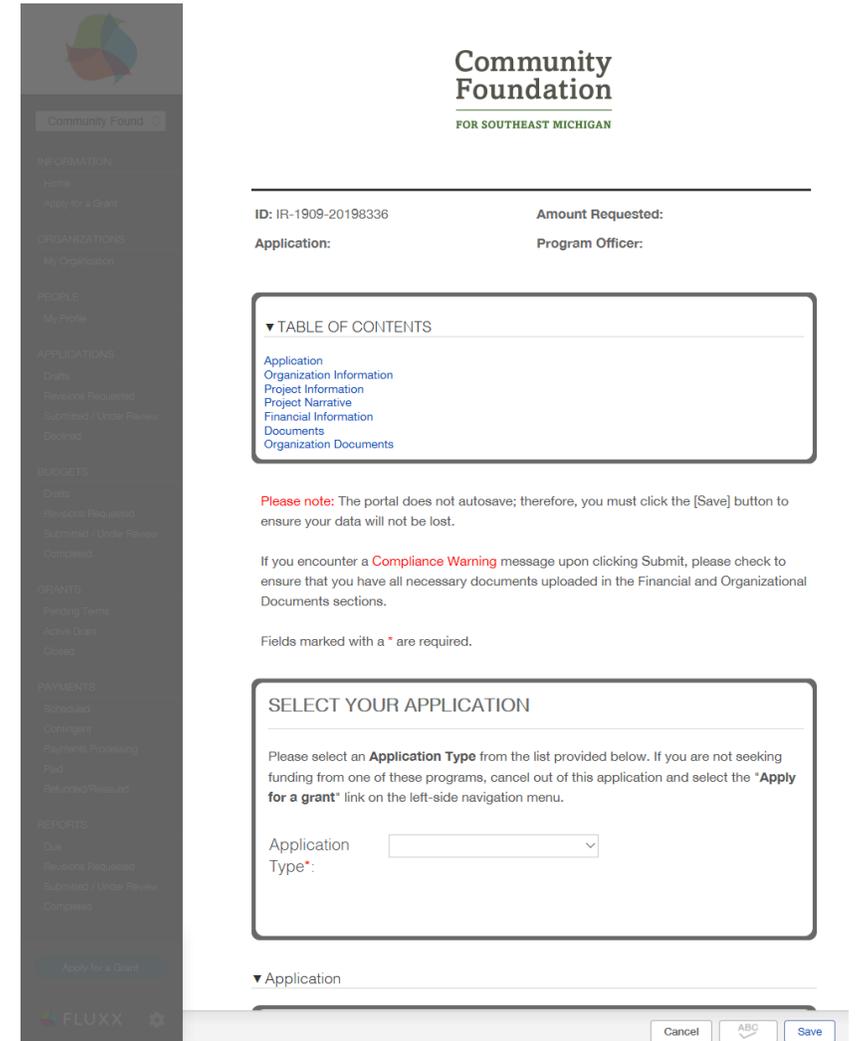
HELPFUL TIPS

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 shows the Community Foundation application portal. At the top right, the logo for the Community Foundation for Southeast Michigan is displayed. Below the logo, the application ID (IR-1909-20198336) and the amount requested are shown. The application is currently in edit mode, as indicated by the 'Application:' label. A 'TABLE OF CONTENTS' section is visible, listing various application sections: Application, Organization Information, Project Information, Project Narrative, Financial Information, Documents, and Organization Documents. A 'Please note' message states that the portal does not autosave and that the user must click the [Save] button to ensure data is not lost. Another note mentions a 'Compliance Warning' message upon clicking Submit, advising the user to check for necessary documents. A note indicates that fields marked with an asterisk are required. A 'SELECT YOUR APPLICATION' section is also visible, with 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

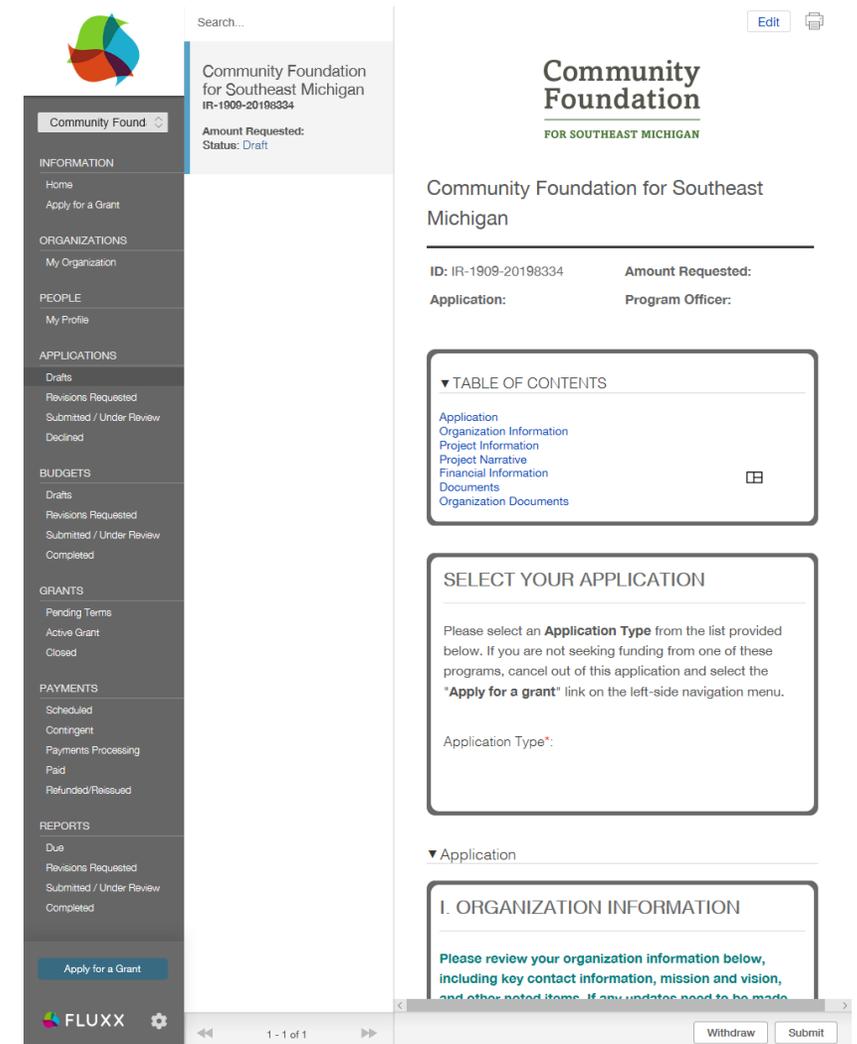
The screenshot displays the FLUXX application portal interface. On the left is a dark navigation sidebar with categories: INFORMATION (Home, Apply for a Grant), ORGANIZATIONS (My Organization), PEOPLE (My Profile), APPLICATIONS (Drafts, Revisions Requested, Submitted / Under Review, Declined), BUDGETS (Drafts, Revisions Requested, Submitted / Under Review, Completed), GRANTS (Pending Terms, Active Grant, Closed), PAYMENTS (Scheduled, Contingent, Payments Processing, Paid, Refunded/Reissued), and REPORTS (Due, Revisions Requested, Submitted / Under Review, Completed). A blue button 'Apply for a Grant' is at the bottom of the sidebar. The main content area shows a search bar, the application title 'Community Foundation for Southeast Michigan IR-1909-20198334', and its status 'Draft'. An 'Edit' button is in the top right. Below this is a 'TABLE OF CONTENTS' box with links for Application, Organization Information, Project Information, Project Narrative, Financial Information, Documents, and Organization Documents. A 'SELECT YOUR APPLICATION' box prompts the user to choose an application type. The bottom of the page shows a 'Withdraw' button, a 'Submit' button, and a footer with 'FLUXX' and '1 - 1 of 1'.

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 navigation menu with categories: 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), and REPORTS (Due, Revisions Requested, Submitted / Under Review, Completed). A blue button labeled 'Apply for a Grant' is at the bottom of the sidebar. The main content area shows the application details for 'Community Foundation for Southeast Michigan' (IR-1909-20198334) with a status of 'Draft'. A search bar is at the top. The right side of the page features the 'Community Foundation FOR SOUTHEAST MICHIGAN' logo, the application ID, amount requested, and program officer. A 'TABLE OF CONTENTS' section lists: Application, Organization Information, Project Information, Project Narrative, Financial Information, Documents, and Organization Documents. Below this is a 'SELECT YOUR APPLICATION' section with instructions to choose an application type. The bottom of the page shows a 'FLUXX' logo, a page indicator '1 - 1 of 1', and 'Withdraw' and 'Submit' buttons.

HELPFUL TIPS

Tips While Applying

Returning to Edit and Submit/Withdraw an Application

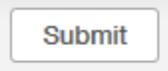
If you need to upload documents not related to the organization, but required as noted in the application, refer to the *Uploading Documents* section and follow those steps here.

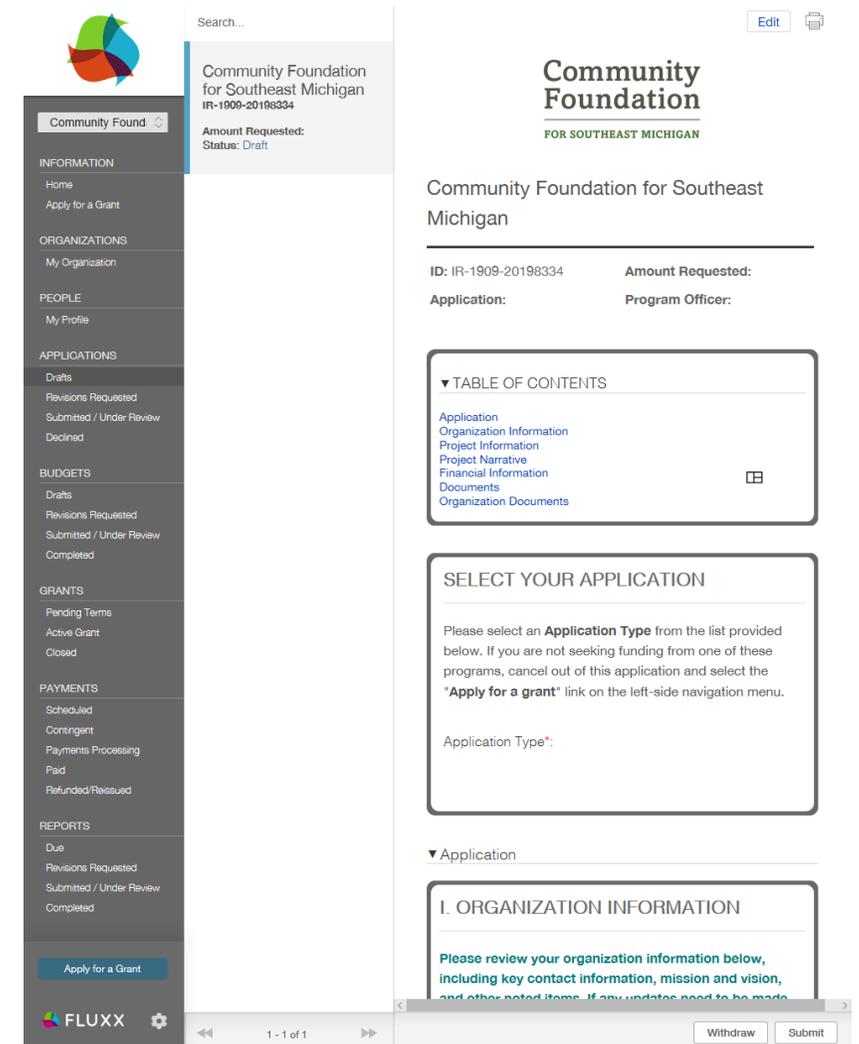
The screenshot displays the FLUXX application portal for the Community Foundation for Southeast Michigan. The interface includes a search bar at the top right, a navigation menu on the left, and a main content area. The navigation menu is organized into several categories: INFORMATION (Home, Apply for 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), and REPORTS (Due, Revisions Requested, Submitted / Under Review, Completed). The main content area shows the organization's name, ID (IR-1909-20198334), and application status (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. The bottom of the page features a 'FLUXX' logo, a settings icon, and navigation buttons for 'Withdraw' and '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.



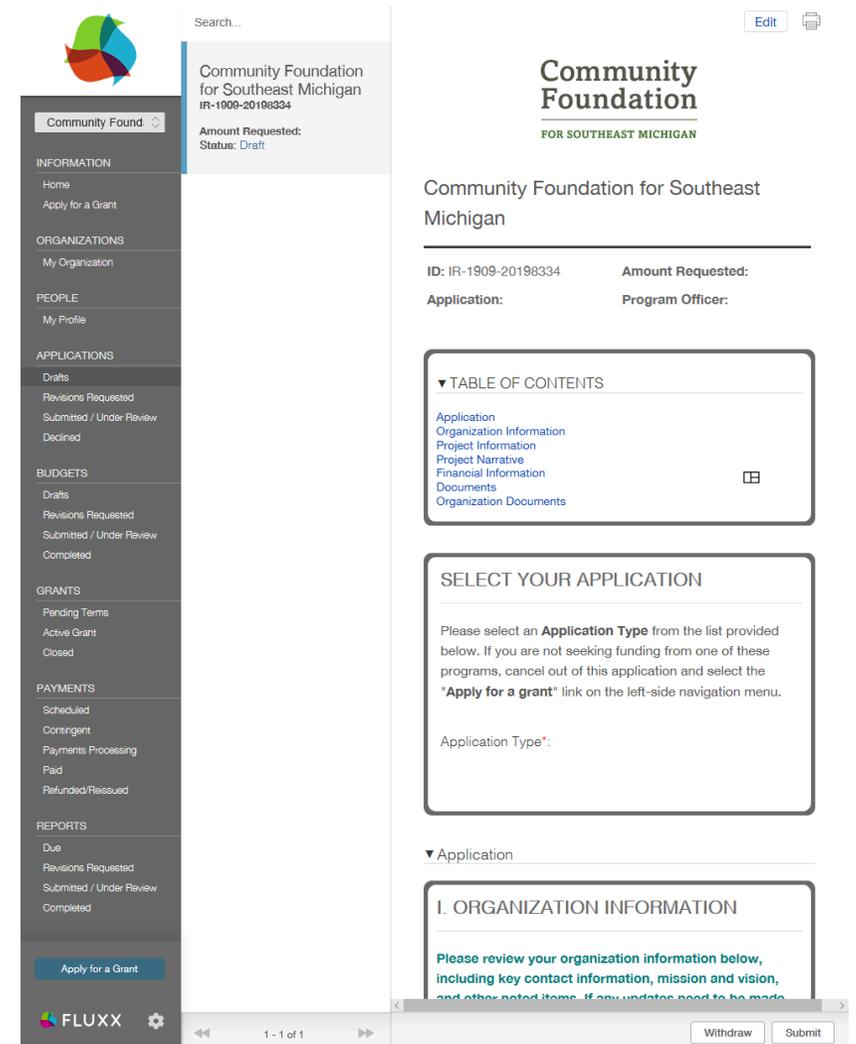
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HELPFUL TIPS

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.



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REPORTING ISSUES AND FEEDBACK

If any applicants, grantees, or students have issues with the portal, please have them send an email to 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.