

M GRANTEE PORTAL: Working with Reports, to Submit

According to the terms outlined in the grant award letter, grantees are required to submit narrative and financial reports on the progress of the grant. Reports should be submitted through the Foundation's grantee portal.

1 LOG IN TO THE GRANTEE PORTAL

Please note that the Foundation's grantee portal is optimized for Google Chrome. For ease of use, [install Google Chrome](#) on your computer.

1. Go to <https://mellon.fluxx.io>
2. Enter **Username** (email address) and **Password** in the fields provided.
3. Click the **Sign In** button.

If you forget your password, click the **Reset or create password** link, and follow the instructions provided.

Assistance: For technical support, please contact Foundation staff at fluxxusers@mellon.org or call (212) 500-2484 during business hours (9:00 a.m. – 5:30 p.m. EST). You should expect a response to your email within three business days. For program-related questions, please contact program staff.

2 LOCATE REPORT RECORD

When it is time to submit a report, be sure to select the report that corresponds with the next upcoming report due date.

1. In the menu on the left, select **REPORTS** → **To Submit**.
2. The upcoming reports for active grants display in a list. To view the report detail, select the relevant **report record** in the list. The full report detail will appear to the right.
3. On the **report** detail record, click **Edit** in the upper right corner.

3 COMPLETE REPORT RECORD

1. Complete **all sections** displayed on the report form. For more information on each type of report, see **Page 3** of this guide.
2. Click **Save**.

Please note: Saving does not submit the report to the Foundation. See **Step 4** for how to submit. Prior to submitting a report, please check that you have completed the financial report section. For more information on completing financial reports, see the [Working with Budgets Guide](#).

4 SUBMIT REPORT TO THE FOUNDATION

1. In the menu on the left, click **REPORTS** → **To Submit**.
2. The list of upcoming reports is displayed. To view the detail, select the relevant report from the list.
3. Click **Submit**.
4. In the **Note for Submit** pop-up window, you may include an optional note for Foundation staff. Click **OK**.

Please note:

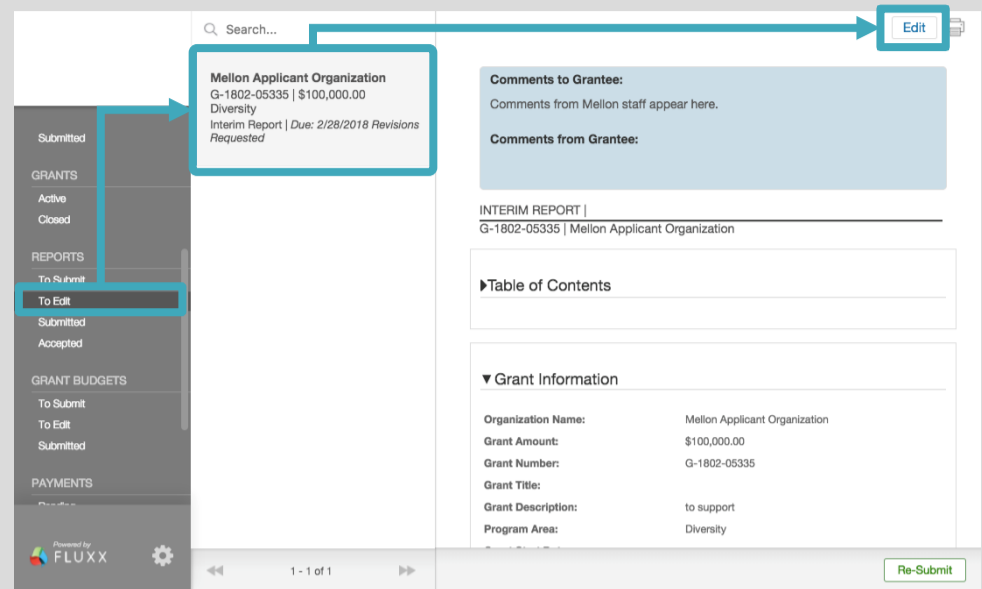
- Payments that are contingent upon approval of a report are only released upon approval of the report by Foundation staff.
- The **Name** field in the Grantee Authorizations section must be complete in order to submit your report.

M GRANTEE PORTAL: Working with Reports, Revisions Requested

Foundation staff may request revisions to your narrative and/or financial reports. You will receive an email notification that the relevant report is available for editing in the portal. Details about the requested revisions are displayed on the report.

1 LOCATE REPORT REVISIONS REQUESTED

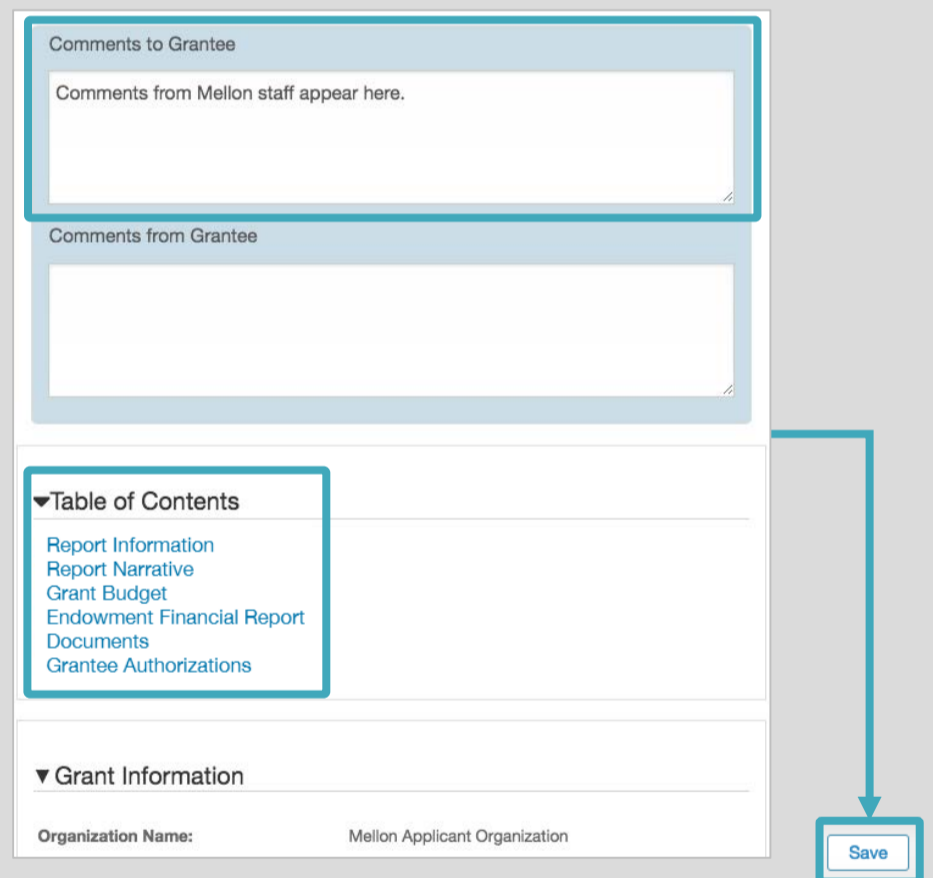
1. In the menu on the left, select **REPORTS → To Edit**.
2. Reports requiring revisions display in a list. To view the report detail, select the relevant **report record** in the list. The full report detail will appear to the right.
3. On **the report detail**, click **Edit** in the upper right corner.



2 COMPLETE REPORT REVISIONS REQUESTED

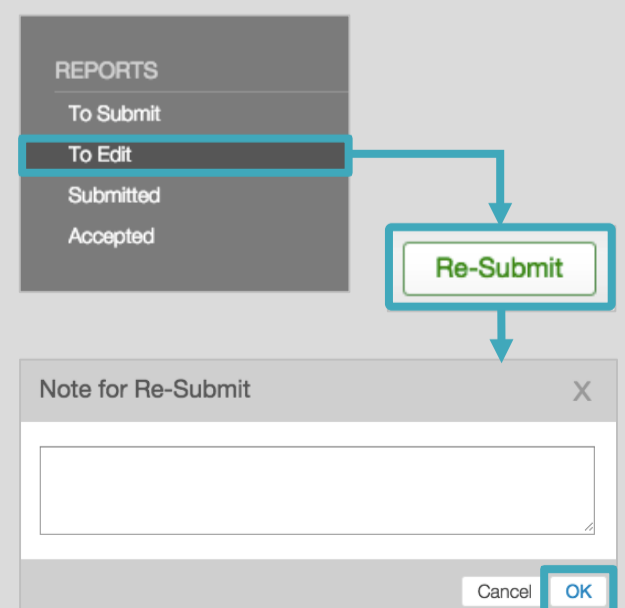
1. At the top of your report, Foundation staff may have provided **Comments to Grantee**, detailing requested revisions.
2. You may also provide comments back to the Foundation in the field **Comments from Grantee**.
3. Use the **Table of Contents** to navigate to different sections of the report record.
4. Enter revisions needed on the **Report** record.
5. Upload any attachments, if relevant.
6. Be sure to complete the **Grantee Authorizations** section.
7. Click **Save**.

Please note: Saving does not submit the report to the Foundation. See **Step 3** for how to submit.



3 SUBMIT REVISED REPORT TO THE FOUNDATION

1. In the menu on the left, select **REPORTS → To Edit**.
2. Reports requiring revision display in a list. To view the report detail, select the relevant **report record** from the list. The full report detail will appear to the right.
3. Click **Re-Submit**.
4. In the **Note for Submit** pop-up window, you may include an optional note for Foundation staff.
5. Click **OK**.



THE ANDREW W. MELLON FOUNDATION REPORT TYPES

You may be required to complete one or more of the following report types according to the terms of your award letter. The required sections for completion are outlined under the report type.

For more information on completing financial reports, see the [Working with Budgets Guide](#).

INTERIM/FINAL REPORT

- **Report Information**
- **Report Narrative**
- **Grant Budget**
- **Endowment Financial Report**, for grants with an endowment component
- **Matching Progress Report**, or Interim Report, for matching grants
- **Supporting Materials**, on Final Report
- **Documents**, if applicable
- **Grantee Authorizations**

ENDOWMENT REPORT

- **Report Information**
- **Report Narrative**
- **Comment to/from Grantee**, optional
- **Endowment Financial Report**
- **Matching Progress Report**, for matching grants
- **Grantee Authorizations**
- **Documents**, if applicable

MATCHING GRANT FUNDS REQUEST FORM

- **List of Contributions of \$5,000 or more**
- **List of Contributions under \$5,000**
- **Matching Request Summary**
- **Documents**, if applicable

CONFIRMATION OF FUNDS

- **Comments**, optional
- **Confirmation of Funds Information**
- **Documents**, if applicable