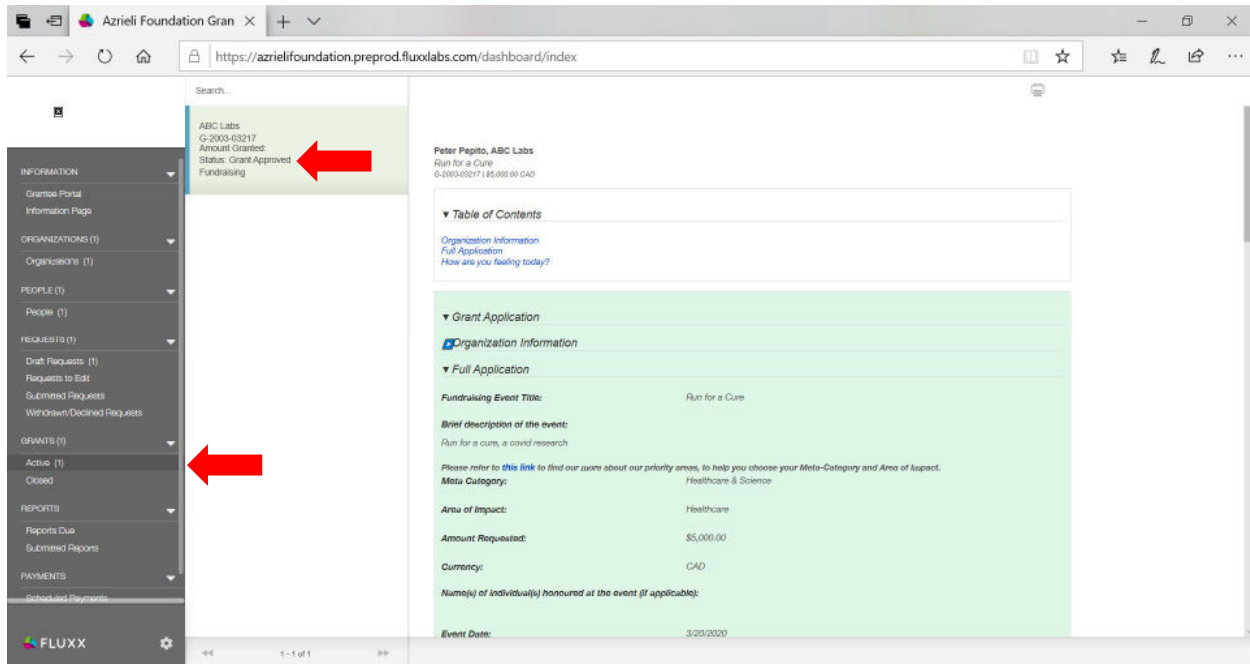


## Managing your active grants in the Fluxx Grantee Portal

You will be able to manage your active grants from the Azrieli Foundation Fluxx Grantee Portal.

Once your grant request is approved, it will be moved to the **“Grants”** section under **“Active”** with status **“Grant Approved”**.



The screenshot shows the Azrieli Foundation Fluxx Grantee Portal dashboard. The left sidebar contains a navigation menu with the following sections: INFORMATION, ORGANIZATIONS (1), PEOPLE (1), REQUESTS (1), GRANTS (1), REPORTS, and PAYMENTS. The 'GRANTS (1)' section is expanded, showing 'Active (1)' and 'Closed'. A red arrow points to the 'Active (1)' link. The main content area displays a search bar and a list of grants. A red arrow points to a grant entry for 'ABC Labs' with ID 'G-2003-03217', amount '\$5,000.00 CAD', and status 'Grant Approved Fundraising'. The right sidebar shows the details for 'Peter Pepto, ABC Labs' with ID 'G-2003-03217', amount '\$5,000.00 CAD', and status 'Grant Approved Fundraising'. The details section includes a 'Table of Contents' with links to 'Organization Information', 'Full Application', and 'How are you feeling today?'. The 'Grant Application' section is expanded, showing 'Organization Information' and 'Full Application'. The 'Full Application' section includes fields for 'Fundraising Event Title' (Run for a Cure), 'Brief description of the event' (Run for a cure, a covid research), 'Meta Category' (Healthcare & Science), 'Area of Impact' (Healthcare), 'Amount Requested' (\$5,000.00), 'Currency' (CAD), 'Name(s) of individual(s) honoured at the event (if applicable)', and 'Event Date' (3/20/2020).

## How to update your User Information

To update your information, click **“People”** then click the **“Edit”** button.

Once you finished updating your information, click **“Save and Close”**.

The screenshot displays the FLUXX application interface. On the left is a dark sidebar menu with categories like INFORMATION, ORGANIZATIONS, PEOPLE, REQUESTS, GRANTS, REPORTS, and PAYMENTS. The 'PEOPLE (1)' option is highlighted with a red arrow. The main content area shows the profile of 'Fluxx Tester' from 'Test Organization'. At the top right of this profile view is an 'Edit' button, also indicated by a red arrow. The profile form includes fields for Contact Information (Salutation, First Name, Last Name), User Title (Work Phone, Phone Extension, Email), and Primary Organization.

Search...

Fluxx Tester  
Test Organization  
lodtgunmayagaywork@gmail.com

Fluxx Tester  
Test Organization

Conflict Of Interest

Contact Information

Salutation:

First Name: Fluxx

Last Name: Tester

User Title:

Work Phone:

Phone Extension:

Email: lodtgunmayagaywork@gmail.com

Primary Organization: Test Organization

FLUXX

1 - 1 of 1

Fluxx Tester

Test Organization

Conflict Of Interest

Contact Information

Salutation

First Name

Fluxx

Last Name

Tester

User Title

Work Phone

Phone Extension

Email

\*\*\*\*\*

## How to request changes to Organization Fields

Grantees cannot make changes to their organization's details and need to request changes to be made by a Grants Manager.

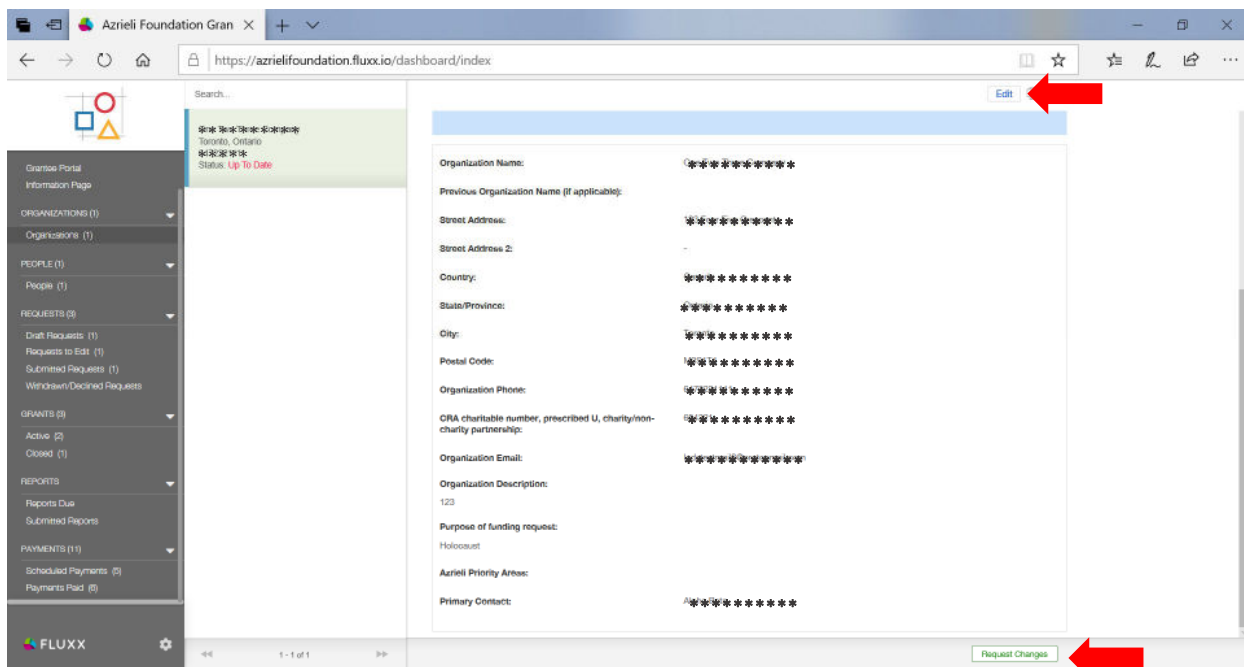
Log into your Azrieli Foundation Fluxx Grantee Portal.

Click on the **"Organization"** link in the left-hand-side navigation bar.

Then click the **"Edit"** button (top right) and fill out the comments box, providing information about the update you need on your organization details. (e.g. Please update the address to 10-123 1/2 MAIN STREET NW MONTREAL QC H3Z 2Y7.)

Attach documentation supporting these changes if applicable.

Hit **"Save"**. Then click **"Request Changes"**.



Click **"OK"** to proceed.



You will see the description of the organization status will change from **"Up to Date"** to **"Changes Requested"**. Once the changes have been resolved, the status will change to **"Up to Date"**.

## How to check your current report due dates and upload reports

You will receive an email reminding you that a report is due and that you need to take action.

Log into your Grantee Portal and click on **“Reports Due”**. Reports for all active grants appear here until submitted. You will receive reminders as the due date approaches.

Click on a report and hit **“Edit”**. Take note of the **“Due On”** as the deadline of submission.

The screenshot shows the Azrael Foundation Grants Manager dashboard. The left sidebar contains a menu with categories: INFORMATION PAGE, ORGANIZATIONS (1), PEOPLE (1), REQUESTS (1), GRANTS (1), REPORTS (1), and PAYMENTS. Under REPORTS (1), there is a sub-item 'Reports Due (1)' which is highlighted with a red arrow. The main content area displays a report for 'Leds General Organization 1' with a due date of 3/3/2020. The report form includes sections for Narrative Information, Outcomes, and Lessons learned. A red arrow points to the 'Edit' button in the top right corner of the report form.

Reports for all active grants appear here until submitted.

Complete the report and necessary document uploads and hit **“Save”**.

To submit the report, click **“Submit”**.

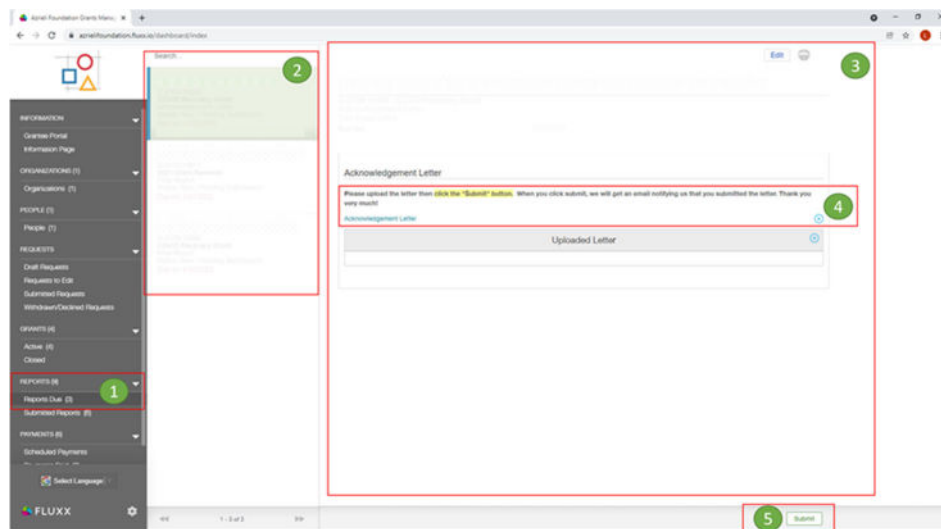
You will receive an email confirming the submission.

The report is now in the 'Submitted' section and no longer editable in the portal.

The screenshot shows the Azrael Foundation Grants Manager dashboard after the report has been submitted. The left sidebar menu is the same, but the 'Reports Due (1)' item is no longer highlighted. The main content area displays the same report for 'Leds General Organization 1', but the status is now 'Report Received' and the due date is 3/3/2020. The report form is now read-only. A red arrow points to the 'Submitted Reports (1)' item in the left sidebar menu.

Once you have turned in a report, you can find a read-only version here.

## Submitting Acknowledgement Letter



In accordance with Canada Revenue Agency requirements, please issue a confirmation letter to the Foundation. The letter will be placed on your letterhead and will include your charitable registration number and the amount and date of the payment received.

1. Log into your Grantee Portal and click on **“Reports Due”** section.  
Acknowledgement letter or receipt for all active grants appear here until submitted. You will receive reminders as the due date approaches.
2. Select acknowledgement letter to be submitted from the list of reports.
3. On the right side, you will see a form where you can upload the letter. Take note of the **“Due On”** as the deadline of submission.
4. Upload the letter by clicking the '+' icon beside the document label **'Acknowledgement Letter'**.
5. Make sure you submit the file by clicking the **“Submit”** button. You will receive an email confirming the submission. The report will be in the 'Submitted' section and no longer editable in the portal.

You will receive an email confirming the submission. The report will be in the 'Submitted' section and no longer editable in the portal.

You will receive an email when the letter has been reviewed and approved.

## How to check your grant payment schedule

To see the payment schedule of your grant, login to the Grantee Portal and click **“Scheduled Payments”**.

The screenshot shows the Azriel Foundation Grants Manager dashboard. On the left sidebar, the 'PAYMENTS (2)' section is expanded, and 'Scheduled Payments (2)' is highlighted with a red arrow. A callout box points to this section with the text: "Scheduled payments for all of your active grants appear here." The main content area displays a table of scheduled payments for Grant ID: G-2001-00438. The table includes columns for Requested By, Payment Type, Due At, Amount Due, and Organization Payee. Below the table, there is a section for Payment Details, including Amount Paid, Payment Confirmation Number, and Last Updated At.

Requested By	Payment Type	Due At	Amount Due	Organization Payee
*****		2/16/2021	\$15,000.00	*****

Payment Details:

Amount Paid	Payment Confirmation Number	Last Updated At
\$0.00		3/3/2020

To see if the payment has been processed or paid click **“Payments Paid”**.

The screenshot shows the Azriel Foundation Grants Manager dashboard. On the left sidebar, the 'PAYMENTS (2)' section is expanded, and 'Payments Paid (1)' is highlighted with a red arrow. The main content area displays a table of paid payments for Grant ID: G-2001-00438. The table includes columns for Requested By, Payment Type, Due At, Amount Due, and Organization Payee. Below the table, there is a section for Payment Details, including Amount Paid, Payment Confirmation Number, Last Updated At, Paid At, Receipt Received, and This is a Re-issue from a Voided payment.

Requested By	Payment Type	Due At	Amount Due	Organization Payee
*****	Cheque	2/14/2020	\$15,000.00	*****

Payment Details:

Amount Paid	Payment Confirmation Number	Last Updated At	Paid At	Receipt Received	This is a Re-issue from a Voided payment
\$15,000.00	1234	3/3/2020	3/3/2020	No	No

You can see the payment information under the **“Payments Paid”** section. Check the details of your grant payment to see the payment type, amount paid and paid at.

## Ended grants

All ended grants will be closed and moved to **“Closed”** under **“Grants”** section.

For questions about the grantee portal, contact [grants@azrielfoundation.org](mailto:grants@azrielfoundation.org)