Valley Water Grantee Fluxx Training Manual

How to Access Fluxx and Create an Account

- Accessing the Landing Page
  1. To access the landing page, type the following URL into your browser address bar - https://valleywater.fluxx.io/
  2. From here, you may log into an existing account or create a new account.
- Registering an account
  - Please note that the information for organizations that have existing active grant projects will be automatically migrated into the Fluxx system. Thus, these organizations will not need to create a new account, and the Valley Water Grants Staff will provide them with login credentials via email.
  1. Go to the Landing Page using the previously provided link.
  2. Click the "Create an Account Now" button on the right side of the Landing Page.
  3. Fill out the Eligibility Questionnaire and click the submit button when you are finished. If you do not pass the Eligibility Questionnaire, you will not be able to register for an account or apply for a grant.

Eligibility Questionnaire

Does the applying entity identify as one of the following: (1) Public Agency (city, town, county, special district, public utility), (2) Non-profit organization with a 501(c)3 tax exempt status, (3) Non-profit organization that is fiscally sponsored by an organization with a 501(c)3 tax exempt status, (4) School, community college, or university (public or not for profit)

[⌄]

Is the project located in Santa Clara County?

[⌄]

Does the project include a minimum 25% matching fund (25% of total project cost)?

[⌄]

Is the proposed project at least 80% implementation?

[⌄]

Is the project discretionary and not required to be completed by other obligations, financial or otherwise?

[⌄]

[Cancel] [Submit]

4. Fill out the Organization Information and Primary Contact Information on the following page. When you are finished, click the Submit Request button at the bottom.

Welcome to Valley Water's Granting Portal!

GuideStar EIN Profile Lookup

Search

Legal Name*

Acronym

Address 1*

Address 2*

City*

Country
United States

5. Your registration request will be sent to our team, and confirmation of its submission will be sent to you via the email you provide under Primary Contact Information. You will be notified of its approval via the same email, along with information on how to log in to the grantee portal.

   ▪ Please note that this account is the master account for your organization, and the person attached to it via registration will be the primary contact for that account. If you would like to create accounts for other employees or associates of your organization or project, email the Valley Water Grants Staff with the name(s) and email address(es) of the person(s) that you would like to create account(s) for. We will create an account for each person, link them to your organization, and send them temporary login credentials so they can access Fluxx.

- Accessing the Grantee Portal
  - You will receive an email confirming approval of your registration request and an assigned username and temporary password. The temporary password is a link – click it to change your password according to the instructions provided.

- When you are finished, go to the Landing Page and log in with your provided user name and newly created password.
- You should now be logged into the Fluxx Grantee Portal. To navigate throughout the portal, follow the links (under each category) on the left side of the page.

How to Change Personal and Organization Information in Fluxx

- Changing personal user details
    1. Go to the Landing Page and log in to the Grantee Portal using your user credentials.
    2. From the Grantee Portal home page, click on the "People" link under the "People" category on the left side of the page.

    3. Click on the user whose personal information you would like to change, and once they are selected, click the "Edit" button at the top right corner of the page.

4. You will now be able to edit the user's first and last name, title, email, and work phone number.
5. When you are finished making changes, click the "Save" button at the bottom right corner of the page.

- Requesting Changes to Organization Information
    - o You cannot make changes to the organization information submitted during registration. Instead, you must request that the Valley Water Grants Staff make any desired changes via Fluxx. Please follow the steps below to do so.
    1. Go to the Landing Page and log in to the Grantee Portal using your user credentials.
    2. From the Grantee Portal home page, click on the "Organization" link under the "Organization" category on the left side of the page.
    3. Click on the organization which you would like to request changes to.

> Strategic Homeland Intervention Enforcement and
> Logistics Division
> McLean, Virginia
> Status: Up To Date
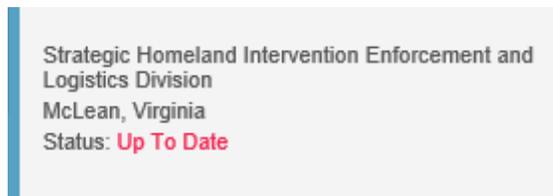
    4. Follow the instructions listed on the page, which are also listed below -
    5. Click the "Edit" button at the top right corner of the page.
    6. Type into the provided comments box labeled "Description of Changes Requested" with the information you would like to be changed.

> **Strategic Homeland Intervention Enforcement and Logistics Division**
> 700 George Washington Memorial Parkway, McLean, Virginia, United States, 22101
>
> ▼ Organization Information Update
>
> 1. To request changes to your organisation's information, click the *Edit* button above.
> 2. Fill in the comments box below with the details of what you would like changed.
> 3. Attach documentation supporting these changes.
> 4. Click *Save.*
> 5. Click *Request Changes.*
>
> Description of Changes Requested
>
> Supporting Documents   ⊕

    7. Attach any relevant documentation supporting the changes to your organizational information. When attaching documents, be sure to select the file and then click upload. The document should then appear under Uploaded Documents.
    8. Click the "Save" button at the bottom right corner of the page.
    9. Click the "Request Changes" button at the bottom right corner of the page.

10. The Valley Water Grants Staff will review the requested changes and update you upon approval or rejection via email.

How to Submit a Grant Application

- Starting a Grant Application
    1. Go to the Landing Page and log in to the Grantee Portal using your user credentials.
    2. From the Grantee Portal home page, click on the link with the type of grant you would like to apply for (Mini-Grant, Water Conservation Grant, Pollution or Restoration Grant, or Education or Access to Open Trails Grant).

    Apply for a Mini Grant

    Apply for a Water Conservation Grant

    Apply for a Pollution or Restoration Grant

    Apply for an Education or Access to Open Trails Grant

    3. Fill out the requested information and upload and attach the necessary documents for grant approval. Remember to click save as you work, as the application does not automatically save.
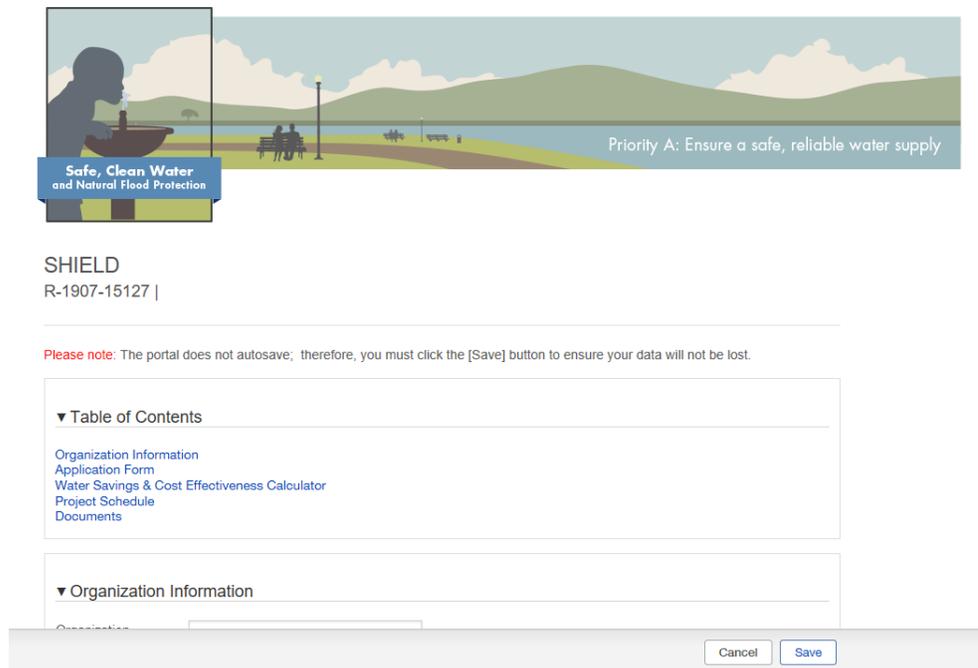
    4. Click save when you are finished. You can access the application again by clicking on the "Drafts" link under the "Requests" category on the left side of the Grantee Portal page.
- Submitting a Grant Application

1. Go to the Landing Page and log in to the Grantee Portal using your user credentials.
2. From the Grantee Portal home page, click on the "Drafts" link under the "Requests" category on the left side of the Grantee Portal page.
3. Scroll to the bottom of the page, and after reviewing your application, click the "Submit" button at the bottom right corner of the page.

Reporting and Invoicing

- Submitting a Report and Invoice
  - o The Valley Water Grants Staff, as part of a grant agreement, will schedule quarterly reporting and invoicing dates, which you will be informed of ahead of time. When you are notified that a report/invoice is due, which will usually occur within two weeks of the date, follow these steps –
  1. Go to the Landing Page and log in to the Grantee Portal using your user credentials.
  2. Click the "Reports Due" link under the "Reports" category and click on the report with the most recent due date.

    SHIELD
    Avengers Initiative Project
    Payment Request
    Status: New
    Due on: 7/12/2019

  3. Click the "Edit" button at the top right corner of the screen and fill out the report. This will be similar to Appendices F and G within the grant agreement. You will still need to provide Appendix E, or the "Project Invoice Spreadsheet", as an attachment to the report in Fluxx.
  4. When you are finished or would like to save your progress, click the save button at the bottom right corner of the window.
  5. When you are ready to submit the report and invoice, click the "Submit" button at the bottom right corner of the screen. You can review your submitted report at any time by clicking on the "Submitted Reports" link under the "Reports" category at the left side of the Grantee Portal page.

    SHIELD
    Avengers Initiative Project
    Payment Request
    Status: Under Review
    Due on: 7/12/2019