HOW TO APPLY FOR A GRANT

Hogg Foundation for Mental Health

Applying for a Grant Using the Fluxx Portal
How to Apply for a Grant

APPLYING FOR A GRANT USING THE FLUXX PORTAL

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GETTING STARTED

- The Hogg Foundation Fluxx Grant Portal is optimized for use with Chrome or Safari browsers and using another browser may cause technical issues. We recommend contacting your IT department to install one of the recommended browsers if it is not currently available to you.
- Please be aware that there is a 30-minute inactivity time-out when using the site. Save often!

USER ACCOUNTS

- New users should visit the Hogg Foundation Fluxx Grant Portal to create an account.
- Click the “Create an account now” button to register. Within five days, you will receive a username and password to log in to the Grantee Portal.
- If you are a reviewer or have applied for a grant with us in the past, you do not need to create a new user account. Please log in with the credentials you were provided during the initial registration.
- If you cannot remember your password or receive an “Invalid Login” message, please click “Reset or create password” on the left side of the login screen to receive your new password. Note: passwords must contain uppercase, lowercase and numerals, as well as be a minimum of 8 characters.
**USING THE FLUXX PORTAL**

- After you log in to the Fluxx portal, the grantee home screen will open. The home screen contains an overview of each section in the left-hand navigation.

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**Welcome to the Hogg Foundation for Mental Health Grantee Portal!**

From this webpage, you can . . .

- Submit a proposal for funding
- Check your organization’s information for accuracy
- Track the status of your pending application
- Upload your signed grant agreement
- Review your current grants and report due dates
- Submit reports
- Monitor grant payments

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**HOW TO USE THE PORTAL**

The icons in various color on the left-hand side are called “cards”. When you click on the link beneath each card, you are accessing the following:

**APPLICATIONS**

- **Pending Applications**
  Once you have saved an application, you may return here to continue editing it.

- **Applications to Edit**
  If you receive a request to edit a proposal, the application is available via this link.

- **Submitted Applications**
  If the staff have any questions about your proposal or would like a revision, you will receive an email alert to login. You can find the proposal here, available for editing. Once you have re-submitted your proposal, the proposal appears in the Submitted Applications link.

**ORGANIZATION**

- **My Organization**
  This is where you may view organization data, including contact information. If any changes in this information need to be made, please contact us through hogg.grants@utexas.edu. Please be sure to include your organization name and grant reference number (if you are already a grantee). Keeping this information accurate ensures a streamlined grant award and payment process.

**GRANTS**

- **Active**
  After staff have received the counter-signed statement of agreement, you may find a read-only copy of your grant and associated documentation via this link.

- **Closed**
  When a grant is closed (all payments/refunds completed and final reports approved), you may find a read-only copy here.
BEGINNING AN APPLICATION

- Select “Start Application” from the left-hand menu and a new screen will open.

Welcome to the Hogg Foundation for Mental Health Grantee Portal!

From this webpage, you can ...
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- Review your current grants and report due dates
- Submit reports
- Monitor grant payments

Please note: There is a 30 minute time-out for inactivity on this portal.

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ORGANIZATION
- My Organization
  - This is where you may view organization data, including contact information. If any changes in this information need to be made, please contact us through hogg-grant@uthuth.texas.edu. Please be sure to include your organization name and grant reference number (if you are already a grantee). Keeping this information accurate ensures a streamlined grant award and payment process.

GRANTS
- Active
  - After staff have received the counter-signed statement of agreement, you may find a read-only copy of your grant and associated documentation via this link.
- Closed
  - When a grant is closed (all payments/refunds completed and final reports approved), you may find a read-only copy here.
• Select the appropriate application link to the grant for which you are applying listed under one of the three headings: Request for Proposals, Request for Applications, or Scholarships and Fellowships.

In order to achieve greater results with our limited funds, the Hogg Foundation has established a competitive process for awarding grants. Our website lists current opportunities for grant funding. For information such as eligibility, due dates, and the application process, please check out our Open RFPs page.

The Hogg Foundation for Mental Health also offers graduate-level scholarships and fellowships to promote and support research and study in the field of mental health. For more information, please visit the Graduate Students Fellowships and Scholarships page.

Be sure to select the appropriate application link.
FILLING OUT AN APPLICATION

- **Remember to SAVE your application regularly!**
  
  Note: After saving, you may log out and return to your application draft at any time.

- Where appropriate, use the drop-down menus to input responses to each question.

**Organization Details**

- Make sure the correct organization auto-populates on the application.
- Make sure the “Location” is your organization’s headquarters.
- Identify the application/grant contacts by selecting them from the drop-down menus.
  
  - If a contact is not listed in the drop-down menu and **will need access** to the application or grant in Fluxx, please have that person create an account via the link on the Fluxx login page (see USER ACCOUNTS above).
  
  - Some organizations will have individuals connected to their application who **will not need access** to the application or grant via Fluxx, but who will have a relationship, such as an official signatory or board member. If an individual such as this is not listed in the drop-down menu, you may select “Add New” next to the appropriate field to add the contact’s information. For example, if John Doe is to be the Primary Point of Contact (PPOC) and John Doe is not listed in the drop-down menu and will not need access to Fluxx, click the “Add New” link and complete the pop-up with John Doe’s information.
Proposal Summary and Grant Proposal Details

- Scroll down to complete the Proposal Summary section. Be sure to use the drop-down menus when appropriate to answer questions.

Please note that the Project Summary should be a summary of the answers provided in the “Proposal Narrative” to be filled out next.
• Continue scrolling down to complete the Grant Proposal Details section.

While the text areas support Rich Text formatting, if copying/pasting from another program (such as Word) please be sure to double check the formatting to make sure it pasted correctly.

• List all key staff: Press the green “+” to the right of the “Key Project Staff” heading to add new project staff members.
Application Documentation: Uploading Required Documents

- Upload the required Application Documents and Organizational Fiscal Documents listed under “Additional Proposal Requirements.”
- Required documents vary by funding opportunity so please be sure to review the list carefully.
- Standard budget and timeline templates are available for download directly from the application.
- Press the green “+” to the right of the Documents heading or Organizational Documents heading to add the respective files.

<table>
<thead>
<tr>
<th>Required Document</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal Timeline</td>
<td><strong>Timeline template</strong>; complete and upload [Excel]</td>
</tr>
<tr>
<td>Proposal Budget</td>
<td><strong>Budget template</strong>; complete and upload [PDF]</td>
</tr>
<tr>
<td>Proposed Staff resume(s)</td>
<td>Upload [PDF]</td>
</tr>
<tr>
<td></td>
<td>Organization completes; applicant uploads</td>
</tr>
<tr>
<td>Letter of Approval to Submit Proposal</td>
<td>If a university, this must be written/signed by your university’s grant office (e.g. Office of Sponsored Projects)</td>
</tr>
<tr>
<td>Letters of Support from Partner Organizations (if applicable)</td>
<td>Partner completes; applicant uploads [PDF]</td>
</tr>
<tr>
<td>Additional requirements (if applicable)</td>
<td>Upload [PDF]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fiscal Documents</th>
<th>Required Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>IRS letter of determination of 501(c)(3) status or tax-exempt status</td>
<td>[PDF]</td>
</tr>
<tr>
<td>Most recent IRS Form 990</td>
<td>[PDF]</td>
</tr>
<tr>
<td>Current operating budget</td>
<td>[PDF]</td>
</tr>
<tr>
<td>Statement of activities (income statements) from the past year</td>
<td>[PDF]</td>
</tr>
<tr>
<td>Statement of financial position (balance sheets) from the past year</td>
<td>[PDF]</td>
</tr>
</tbody>
</table>

Download the Timeline and Budget templates to complete and upload.

Universities: the Letter of Approval to Submit must come from your university grant office (e.g. Office of Sponsored Projects).

Click the “+” signs to upload documents.
Note: Each document must be properly identified from the drop-down menu as the required document type while uploading, i.e., the budget must be uploaded as “Proposed Budget;” the timeline must be uploaded as “Proposed Timeline;” etc.

You will not be able to submit your application if the required documents are not properly identified.

Required Application and Fiscal Document Types

- Proposed Timeline
- Proposed Budget
- Proposed Staff Resume and/or job description
- Letter of Approval to Submit Proposal
- Letter of Support from Partner Organizations
- IRS letter of determination of 501(c)(3) status or tax-exempt status
- Most recent IRS Form 990
- Current operating budget
• Statement of activities (income statements) from the past year

• Statement of financial position (balance sheets) from the past year

Please be aware that you will not be able to delete uploaded files; contact Hogg-Grants@austin.utexas.edu if you require assistance deleting a file.

PENDING AND SUBMITTING AN APPLICATION

• To access saved application drafts select “Pending Applications” from the left-hand menu of the grantee home screen. Select the draft to enable editing – the draft application will load.

• Press “Edit” at the top right-hand corner of the application screen to enable editing; you may “Save” your edits and return to finish the application later using the same process.

• When finished, press “Submit” at the bottom right-hand corner of the application screen once the application is complete. Leave the pop-up “Note” empty.

• Please note: Once your application is submitted, you cannot retrieve it to make changes or edits. If you have concerns after submitting please contact hogg-grants@austin.utexas.edu.
STEPS AFTER SUBMISSION

- Once submitted, select “Submitted Applications” from the left-hand menu of the grantee home screen to see the status of an application. The application screen will load.

- Should the foundation request that you submit additional information following a proposal submission, you will receive an email detailing the requested changes. Return to the Fluxx portal and select “Applications to Edit” from the left-hand menu of the grantee home screen. A new screen with applications to edit will load. Once edits have been made, be sure to submit your application again.
There is a 30-minute time-out for inactivity on the Fluxx portal. Remember to SAVE often!