

# 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

Table of Contents

GETTING STARTED..... 2

USER ACCOUNTS..... 2

USING THE FLUXX PORTAL..... 3

BEGINNING AN APPLICATION..... 4

FILLING OUT AN APPLICATION ..... 6

    Organization Details ..... 6

    Proposal Summary and Grant Proposal Details ..... 7

    Application Documentation: Uploading Required Documents..... 9

    Required Application and Fiscal Document Types ..... 10

PENDING AND SUBMITTING AN APPLICATION ..... 11

STEPS AFTER SUBMISSION ..... 12

## 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.



### Welcome to the Hogg Foundation Grant Portal

Login Now:

[Reset or create password](#)

If you do not remember or do not know your password, you may reset it.

If you do not have an account, you may create one by clicking here and completing the form.

**Technical Note: This portal is optimized for use with Chrome or Safari browsers.**

If you are using another browser, you may experience technical issues. If so, we recommend you contact your IT department to install one of the recommended browsers.

Also, please be aware that there is a 30 minute time-out when using the site.

If you are a new user, please register by clicking on the "Create an Account Now" button.

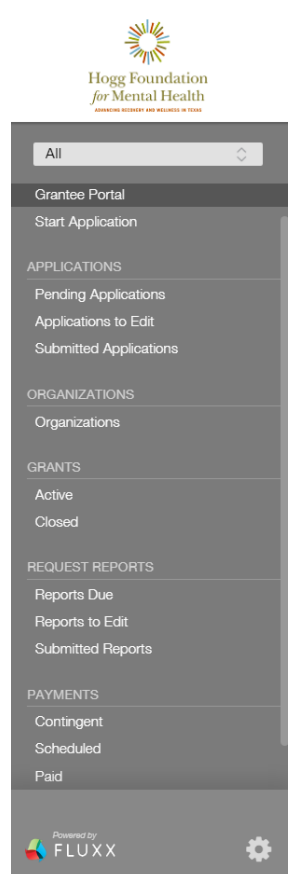
If you are a reviewer or have applied to Hogg Foundation in the past, you do not need to create a new user account. Please log in with the credentials you were provided during initial registration. If you cannot remember your password, please click the "Reset or create password" link to the left to receive your new password. Note: passwords must contain uppercase, lowercase, and numerals, as well as be a minimum of 8 characters.

**Learning the Fluxx System as a Grantee user?**

Click the Create an account now button to register. You will receive a username and password to login to the Grantee Portal within five days.

## 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.



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

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

### 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.

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.

- Submitted Applications

Once you have submitted an application, you can find a read-only version here.

#### 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@austin.utexas.edu](mailto:hogg-grants@austin.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

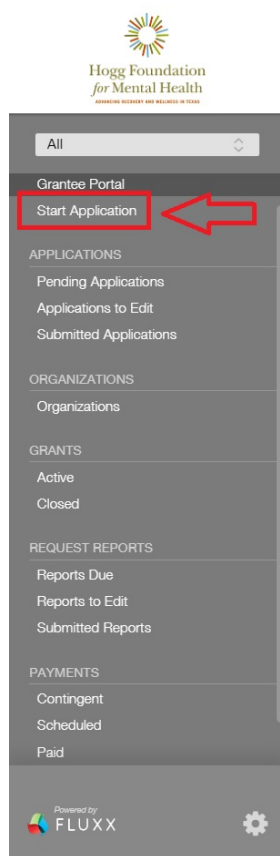
After staff have received the counter-signed statement of agreement, you may find a read-only copy of your grant and associated documentation via this link.

- 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 . . .**

- 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

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

**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.

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.

- Submitted Applications

Once you have submitted an application, you can find a read-only version here.

**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@austin.utexas.edu](mailto:hogg-grants@austin.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**

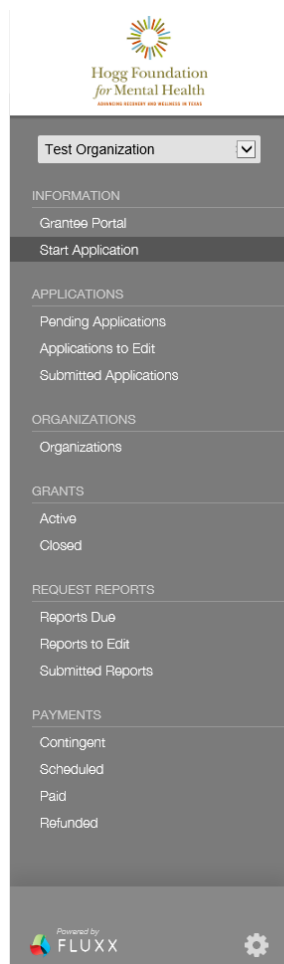
- Active

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.

- 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.

### Requests for Proposals

[RFP: Evaluator](#)

### Requests for Applications

[RFA: Evaluators for Mental Health Grant Programs](#)

### Scholarships and Fellowships

[Frances Fowler Wallace Memorial Award](#)

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.

Save frequently during application process

Applicant: Please be sure to visit the FAQ for this RFP. You may reach the FAQ by clicking on the appropriate RFP link on our Open RFPs page (<http://hogg.utexas.edu/for-grantees-grantseekers/open-rfps>) and scrolling to the bottom of the page.

RFP Template: Application Title

Check for accuracy

▼ Organization Details

Organization: Test Organization Add New

Location: Test Organization - headquarters

Primary Point of Contact (PPOC): Add New Use only if contact is not listed in the drop-down and does not need access to the application/grant.

Authorized Organizational Representative (AOR): Add New

Financial Officer (FO): Add New

Grant Liaison (GL): Add New

Board Chair (BC) or Second Signatory:

All the above contacts will be notified in the case of an award or denial.

**Primary Point of Contact (PPOC)** (Program Director/Lead, Pre-Award Specialist, Principal Investigator): The person who can negotiate agreement and/or is responsible for supervising the proposed project.

**Authorized Organizational Representative (AOR)** (Signature Authority, Board Chair, Office of Sponsored Projects, CEO): The person who can legally sign contracts for the organization.

**Financial Officer (FO)** (Post-Award Accountant): The person responsible for the proposed budget and fiscal reports for the proposed project.

**Grant Liaison (GL)**: The person responsible for the on-line submission of narrative and fiscal reports for the proposed project.

Cancel ABC Save

## 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.

▼ Proposal Summary

This document will serve as your proposal cover letter. Please enter information in the fields below.

Project Title

Project Summary

Please provide a brief summary of the proposal narrative (i.e. a summary of the answers provided to the proposal narrative questions below). (1500 character limit)

T

B

i

u

⊖

S'

S,

: =

≡

↶

↷

Characters left for this group:1500

Total funding requested:

Have you or your organization applied for or received an award from the Hogg Foundation for Mental Health before?

Are you a domestic public charity or non-profit?

Is your agency based in the state of TEXAS or doing business as a Texas-based affiliate of U.S. company?

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.

▼ Grant Proposal Details

▼ Proposal Narrative

Applicant Background and Relevant Work

*Applicants should describe their mission and vision and how it aligns with the goals of the grant, including: 1) applicant's internal support for the proposal, including leadership; 2) history of relevant programs and accomplishment; 3) relevant community involvement; 4) applicant's geographic location; 5) history of population served or impacted.*

T: B i u ↺ S' S, := ≡ ↶ ↷

Proposed Demographics and Needs

*Applicants should describe the intended beneficiaries and their needs, including: 1) proposed population or audience who will benefit from this grant, including race and ethnicity; 2) socio-economic status; 3) geographic area (e.g., city, zip codes, neighborhoods, rural/urban, etc.); 4) needs, challenges, and opportunities to be addressed in this proposal; 5) data sources for relevant facts and information that support the proposal.*

T: B i u ↺ S' S, := ≡ ↶ ↷

Proposed Goals

*Applicants should describe the main purpose of their proposal, including: 1) goals of the proposal; 2) strategies or methods that will be used to achieve the goals.*

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.

▼ Proposed Staff

List all key project staff, including employees, potential contractors, and potential consultants who will be involved in this grant project by clicking the green “plus” button on the right-hand side of the screen. Resumes and/or job descriptions will be uploaded into the Documents section below.

Key Project Staff

☐ John Doe Primary Investigator

☐ Jane Doe Project Manager

➕

Edit ⌵

Edit ⌵

## 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.

▼ Application Documentation

▼ Additional Proposal Requirements

The following is a list of required documents that must be added to the Documents section below. For further explanation of what should be included in each file, please refer to the RFP.

Required Document	Instructions	Required Format
Proposal Timeline	<b>Timeline template:</b> complete and upload	Excel
Proposal Budget	<b>Budget template:</b> complete and upload	Excel
Proposed Staff resume(s) and/or job description(s)	Upload	PDF
Letter of Approval to Submit Proposal	Organization completes; applicant uploads <b>If a university, this must be written/signed by your university's grant office (e.g. Office of Sponsored Projects)</b>	PDF
Letters of Support from Partner Organizations (if applicable)	Partner completes; applicant uploads	PDF
Additional requirements (if applicable)	Upload	PDF


DOCUMENTS 

▼ Fiscal Documents

Applicants must submit the following fiscal documents to assist the foundation in assessing the organization's fiscal soundness. They must be uploaded in the Fiscal Documents Folder below. (The foundation may request additional fiscal documents when reviewing proposals.)

Please be aware that applicants may not delete files in this section once uploaded; please contact [Hogg-Grants@austin.utexas.edu](mailto:Hogg-Grants@austin.utexas.edu) for assistance.

Required Document	Required Format
IRS letter of determination of 501(c)(3) status or tax-exempt status	PDF
Most recent IRS Form 990	PDF
Current operating budget	PDF
Statement of activities (income statements) from the past year	PDF
Statement of financial position (balance sheets) from the past year	PDF

FISCAL DOCUMENTS 

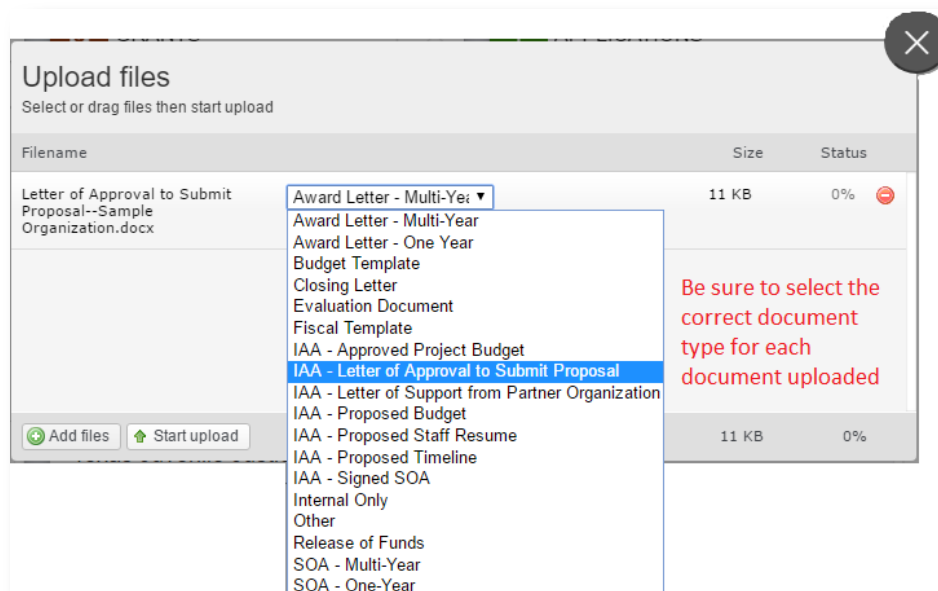
Download the Timeline and Budget templates to complete and upload.

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](mailto:Hogg-Grants@austin.utexas.edu) if you require assistance deleting a file.**

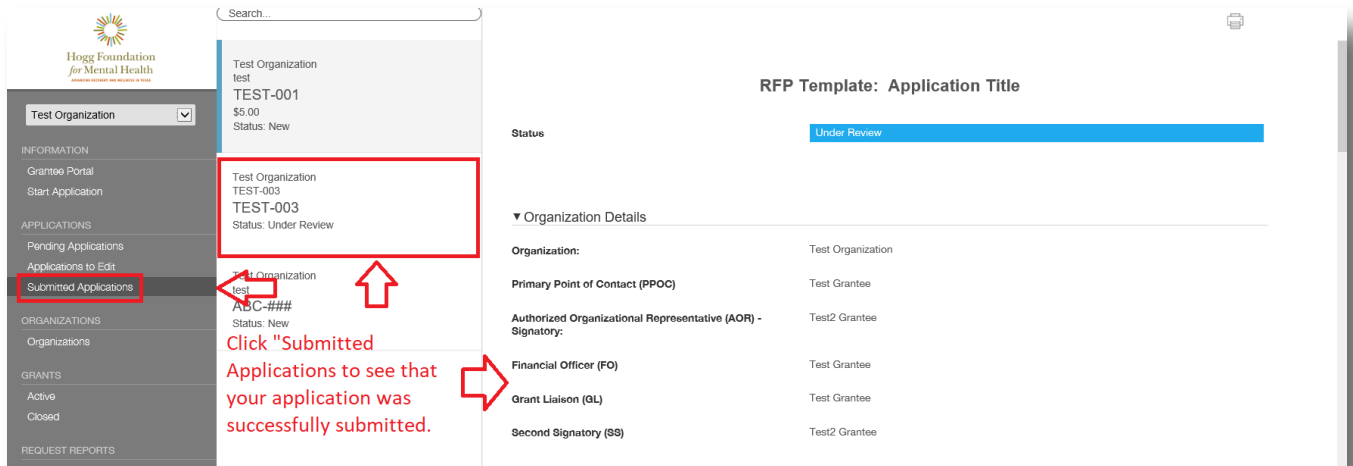
## PENDING AND SUBMITTING AN APPLICATION

- 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](mailto:hogg-grants@austin.utexas.edu).

The screenshot displays the Hogg Foundation for Mental Health application portal. On the left, a sidebar menu lists various options, with 'Pending Applications' highlighted under the 'APPLICATIONS' section. A red arrow points to this menu item. The main content area shows the application details for a 'Draft' status. At the top right, an 'Edit' button is highlighted with a red box and a red arrow pointing to it. Below the application title, there is a section for 'Organization Details' with fields for Organization, Primary Point of Contact (PPOC), Authorized Organizational Representative (AOR) - Signatory, Financial Officer (FO), Grant Liaison (GL), and Second Signatory (SS). At the bottom right, a 'Submit' button is highlighted with a red box and a red arrow pointing to it. The page also includes a search bar at the top, a 'Test Organization' status indicator, and a 'Save frequently during application process' message.

## 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.

**Hogg Foundation for Mental Health**  
FLUXX

Search...

Test Organization  
Test Application  
TEST-003  
Status: Change Request

Any changes requested will be included both in the email you receive and at the top of the application to be edited.

**RFP Template: Application Title**

Status: **Change Request**

**Change Request Required**  
Comments: The uploaded "Letter of Approval to Submit" is not from your university's grant office. Please upload a letter completed by your university grant office.

▼ Organization Details

Organization:	Test Organization
Primary Point of Contact (PPOC):	Test2 Grantee
Authorized Organizational Representative (AOR) - Signatory:	Test2 Grantee
Financial Officer (FO):	Test5 Grantee
Grant Liaison (GL):	Test Grantee
Board Chair (BC) or Second Signatory:	

► Proposal Cover Letter

► GRANT PROPOSAL DETAILS

Submit

**There is a 30-minute time-out for inactivity on the Fluxx portal. Remember to SAVE often!**