



GRANTEE PORTAL: Working with Proposal Budgets, to Submit

The following will show you how to create a proposal budget and submit it to the Foundation.

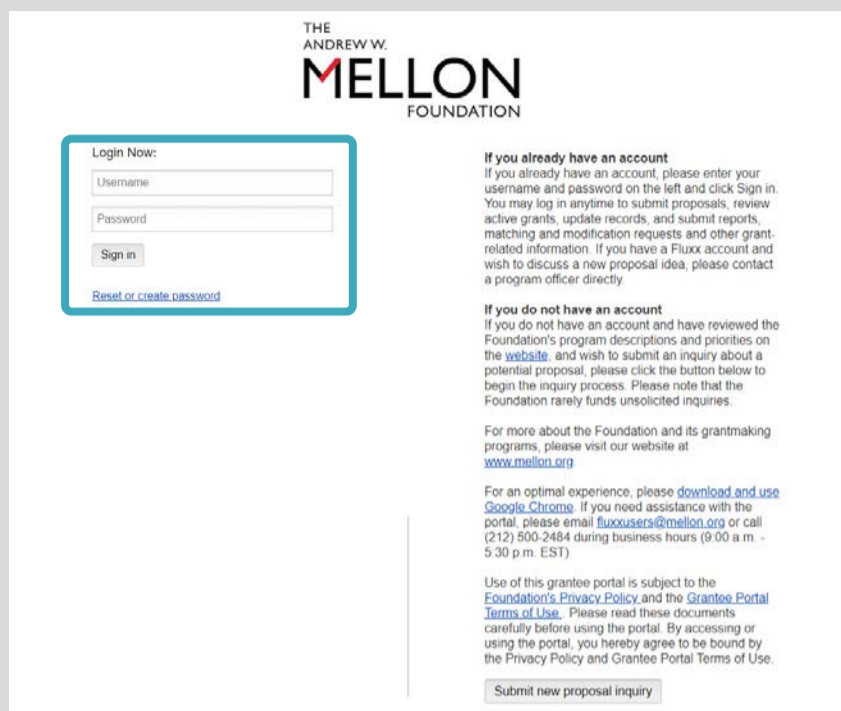
1 LOG IN TO THE GRANTEE PORTAL

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.

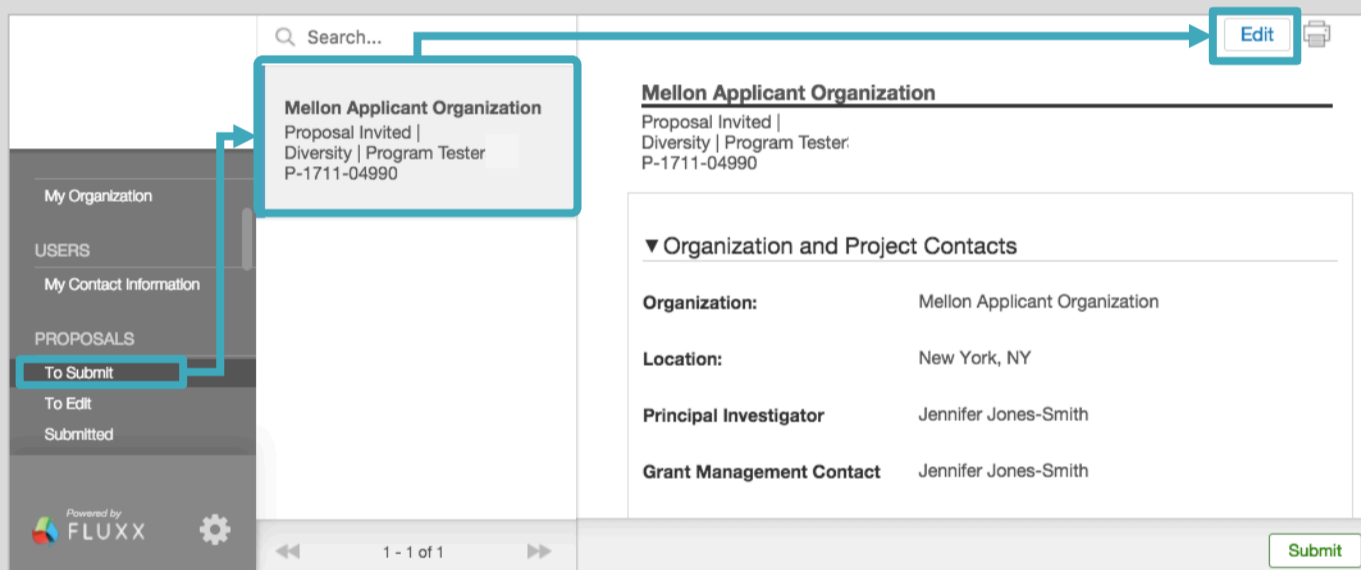
If you forget your password, click the **Reset or create password** link, and follow the instructions provided.

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.



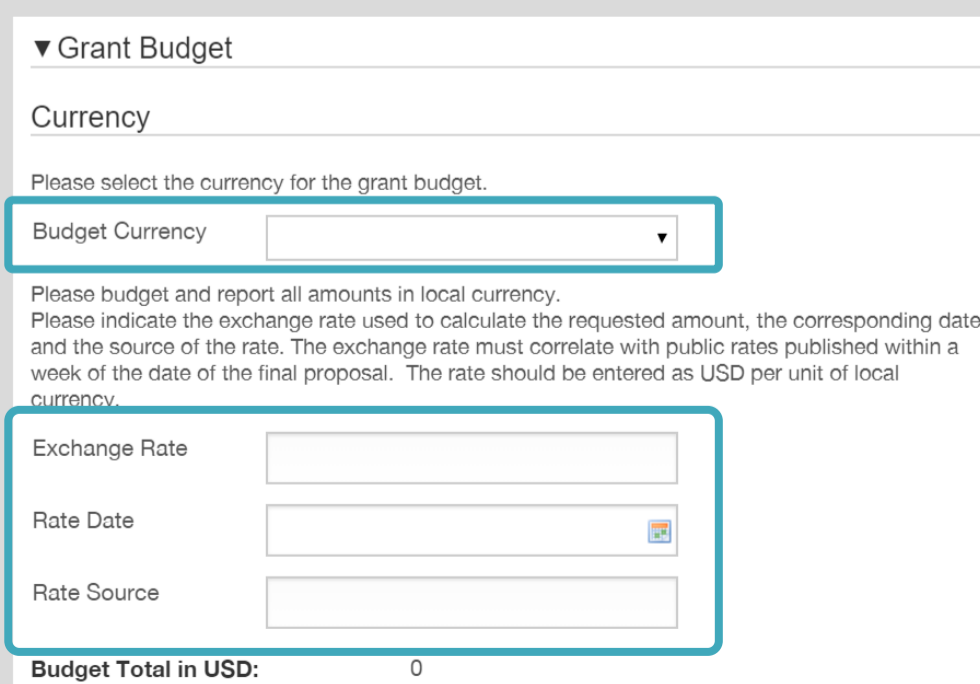
2 LOCATE PROPOSAL

1. In the menu on the left, select **Proposals → To Submit**.
2. The proposals and inquiries will display in a list. To view the proposal detail, select the relevant **proposal record** in the list. The full proposal detail will appear to the right.
3. On the **proposal** detail, click **Edit** in upper right corner.



3 NAVIGATE TO PROPOSAL GRANT BUDGET SECTION, AND SELECT CURRENCY

1. Within the proposal detail, use the Table of Contents or scroll to navigate to the **Grant Budget** section.
2. Enter the following:
 - **Budget Currency**
 - **Exchange Rate**, if not USD (entered as USD per unit of local currency)
 - **Rate Date**, if not USD
 - **Rate Source**, if not USD





GRANTEE PORTAL: Working with Proposal Budgets, to Submit continued

Create each grant budget period and enter the respective budget amounts for all necessary expenditure categories. Once entered, you can export all of the budget periods to Microsoft Excel, though note that changes made in Excel will not be reflected or saved in the portal.

4 CREATE GRANT BUDGET PERIOD(S)

1. Within the proposal detail, navigate to the **Grant Budget** section, and find the **Budget Period** subsection.
2. Click the **“+” icon** to create a new budget period.
3. Enter the following:
 - **Period Details**, (e.g., Year 1, Period 1) required
 - **Period Start Date**, required
 - **Period End Date** (budget periods are typically one year in duration)
 - **Budget amounts** for relevant itemized expenditure categories. Up to five optional, custom categories may be added to the predefined expenditure categories. Please refer to the Foundation’s [proposal guidelines](#) or the proposal Budget Narrative section for definitions of the expenditure categories.
4. Click **Save**.
5. Totals will appear on the proposal record for each period after saving.
6. Repeat these steps for each budget period associated with the proposal.

Please note: To delete a budget period, please contact Foundation staff.

Please click the "+" icon to the right of Budget Period to add each individual budget reporting period.

Budget Period

No Budget Period have been added

Add Budget Period

Mellon Applicant Organization

Period:

Organization Name: Mellon Applicant Organization
Grant Number: P-1709-04854
Amount Requested:
Program Area Name: Diversity

Please enter the name of the budget period (e.g., Period 1, Period 2, or Year 1, Year 2, etc.) and the start and end dates. The length of each budget period should be, in general, one year. Please discuss appropriate budget period length with Foundation staff, as the grant start and/or end dates may require the first or last budget period to be longer or shorter than one year.

Period
Year 1

Period Start Date
01/01/2018

Period End Date
12/31/2018

Item	Budget	Actual
Salaries and Wages – Fellowships and Residencies	75,000	
Salaries and Wages – Program	38,034	
Salaries and Wages – Administration	80,750	
Salaries and Wages – Other	30,000	
Benefits	54,443	
Travel	2,500	
Conference and Meetings – Non-Travel		
Equipment and Supplies	1,000	
Consultants and Professional Services (including Artist Fees)		
Subgrants/Regrants		
Promotion, Marketing, and Advertising	2,600	
Occupancy Costs		
Rentals	1,500	
Optional (click to edit)		
Optional (click to edit)		
Optional (click to edit)		
Optional (click to edit)		

Budget Period

Budget Period	Budget	Actual	Variance
Year 1: 1/1/2018 to 12/31/2018	285,827	0	-285,827
Total	285,827	0	-285,827

Save

5 EXPORT BUDGET PERIODS TO EXCEL

Applicants may export budget periods to view in Microsoft Excel at any time.

1. Within the proposal detail, navigate to the **Grant Budget** section, and find the **Budget Period** subsection.
2. Click the **green Excel icon**.
3. The report will download to your computer. Click to open the exported excel report.

Please note: Any changes made to the exported Excel spreadsheet are **not saved** to the grantee portal.

If budget edits are required, go back into the grantee portal to the Budget Period section. Click the **blue pencil icon** for the relevant budget period. Update as needed, and click **Save**.

Budget Period	Budget	Actual	Variance
Year 1: 1/1/2018 to 12/31/2018	285,827	0	-285,827
Year 2: 1/1/2019 to 12/31/2018	290,185	0	-290,185
Total	576,012	0	-576,012

Budget Period

fluxx_grant_budget_10....xls

Description	Year 1 1/1/2018 to 12/31/2018			Year 2 1/1/2019 to 12/31/2018		
	Budget	Actual	Variance	Budget	Actual	Variance
Salaries and Wages – Fellowships and R	75,000.00		-75,000.00	75,000.00		-75,000.00
Salaries and Wages – Program	38,034.00		-38,034.00	38,790.00		-38,790.00
Salaries and Wages – Administration	80,750.00		-80,750.00	80,750.00		-80,750.00
Salaries and Wages – Other	30,000.00		-30,000.00	30,000.00		-30,000.00
Benefits	54,443.00		-54,443.00	58,045.00		-58,045.00
Travel	2,500.00		-2,500.00	2,500.00		-2,500.00
Conference and Meetings – Non-Travel			0.00			0.00
Equipment and Supplies	1,000.00		-1,000.00	1,000.00		-1,000.00
Consultants and Professional Services (including Artist Fees)			0.00			0.00
Subgrants/Regrants			0.00			0.00
Promotion, Marketing, and Advertising	2,600.00		-2,600.00	2,600.00		-2,600.00
Occupancy Costs			0.00			0.00
Custom: Rentals	1,500.00		-1,500.00	1,500.00		-1,500.00
Custom: 2			0.00			0.00
Custom: 3			0.00			0.00
Custom: 4			0.00			0.00
Custom: 5			0.00			0.00
Total	285,827.00	0.00	-285,827.00	290,185.00	0.00	-290,185.00

When all budget periods are complete, review the budget snapshot, provide the final proposal budget authorization, and enter the budget narrative.

6 REVIEW THE BUDGET SNAPSHOT

1. Within the proposal detail, navigate to the **Grant Budget** section, and find the **Budget Snapshot** subsection.
2. In the Budget Snapshot subsection, you may view the budget for all periods of the grant. Depending on how many budget periods are entered, you may need to scroll horizontally to view all of the budget periods. The snapshot also includes totals for each budget period.

	Year 1			Year 2		
	1/1/2017 to 12/31/2017			1/1/2018 to 12/31/2018		
	Budget	Actual	Variance	Budget	Actual	Variance
Salaries and Wages – Fellowships and Residencies	75,000		-75,000	75,000		-75,000
Salaries and Wages – Program	38,034		-38,034	38,790		-38,790
Salaries and Wages – Administration	80,750		-80,750	80,750		-80,750
Salaries and Wages – Other	30,000		-30,000	30,000		-30,000
Benefits	54,443		-54,443	58,045		-58,045
Travel	2,500		-2,500	2,500		-2,500
Conference and Meetings – Non-Travel			0			0
Equipment and Supplies	1,000		-1,000	1,000		-1,000
Consultants and Professional Services (including Artist Fees)			0			0
Subgrants/Regrants			0			0
Promotion, Marketing, and Advertising	2,600		-2,600	2,600		-2,600
Evaluation			0			0
Artist Occupancy Costs			0			0
Custom: Rentals	1,500		-1,500	1,500		-1,500
Custom: 2			0			0
Custom: 3			0			0
Custom: 4			0			0
Custom: 5			0			0
Total	285,827	0	-285,827	290,185	0	-290,185

7 PROVIDE PROPOSAL BUDGET AUTHORIZATION

1. Within the proposal detail, navigate to the **Grant Budget** section, and find the **Proposal Budget Authorization** subsection.
2. Enter the name and contact details of the person in your organization with institutional responsibility for financial reporting who reviewed the final budget, as follows:
 - **Name**
 - **Title**
 - **Email**
 - **Date of Review**

Proposal Budget Authorization

In the space below, please enter the name and contact details of the person in your organization with institutional responsibility for financial reporting who reviewed the final budget.

Name	<input type="text"/>
Title	<input type="text"/>
Email	<input type="text"/>
Date of Review	<input type="text"/>

Please note: These fields are required before submitting the final proposal.

8 ENTER BUDGET NARRATIVE

The budget narrative should describe and justify the cost assumptions for each expenditure category. Please review the description of the Foundation’s expenditure categories noted in this section and in the [proposal guidelines](#) before completing the narrative. The **Total Amount Budgeted** displays above each expenditure category notes field.

1. Go to the **Budget Narrative** section.
2. Enter the following:
 - **Budget Notes by Category**
 - Salaries and Wages – Fellowships and Residencies
 - Salaries and Wages – Program
 - Salaries and Wages – Administration
 - Salaries and Wages – Other
 - Benefits
 - Travel
 - Conferences and Meetings – Non-Travel
 - Equipment and Supplies
 - Consultants and Professional Services (incl. Artists Fees)
 - Subgrants/Regrants
 - Promotion, Marketing and Advertising
 - Occupancy Costs
 - Additional Budget Categories
3. Click **Save**.

▼ Budget Narrative

Budget Notes by Category

Please provide any category-specific notes in the fields below.

Salaries and Wages – Fellowships and Residencies: Total salaries, excluding benefits, for all fellowships, residencies, and stipends, and/or course releases for the principal investigator, project director, artistic staff, and/or faculty. The budget narrative should list the base salary or stipend amount for each fellow or resident, the number of people in each position, and, if applicable, the FTE percentage allocation.

Total Amount Budgeted: 0
Notes

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Enter Salaries and Wages - Fellowships and Residencies notes here.

Salaries and Wages – Program: Total salaries, excluding benefits, for all programmatic employees, which may include salaries, stipends, and/or course releases for the principal investigator, project director, artistic staff, and/or faculty. The budget narrative should list the base salary, stipend, and/or course release amount for each position, the number of people in each position, and, if applicable, the FTE percentage allocation.

Total Amount Budgeted: 0
Notes

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Enter Salaries and Wages - Program notes here.

Salaries and Wages – Administration: Total salaries, excluding benefits, for all administrative employees involved in the grant-funded project or activities, which may include salaries for executive, finance, communications, and/or clerical staff. The budget narrative should list the base salary for each position, the number of people in each position, and, if applicable, the FTE percentage allocation.

Total Amount Budgeted: 0
Notes

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Enter Salaries and Wages - Administration notes here.

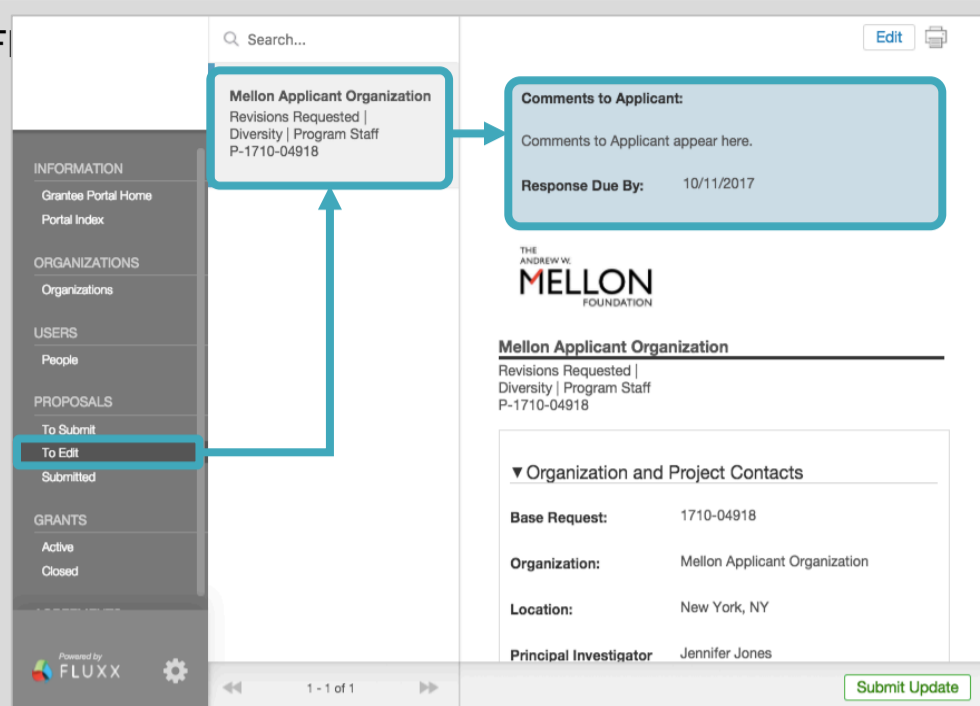
Please note: Grant budget information may be edited until the proposal or final proposal is submitted. After submission, budget information becomes read-only.

M GRANTEE PORTAL: Working with Proposal Budgets, Revisions Requested

Foundation staff may request revisions to the proposed budget. You will receive an email notification, and the proposal and associated budget periods will be available for revision and submission in the grantee portal.

1 REVIEW COMMENTS FROM FOUNDATION STAFF

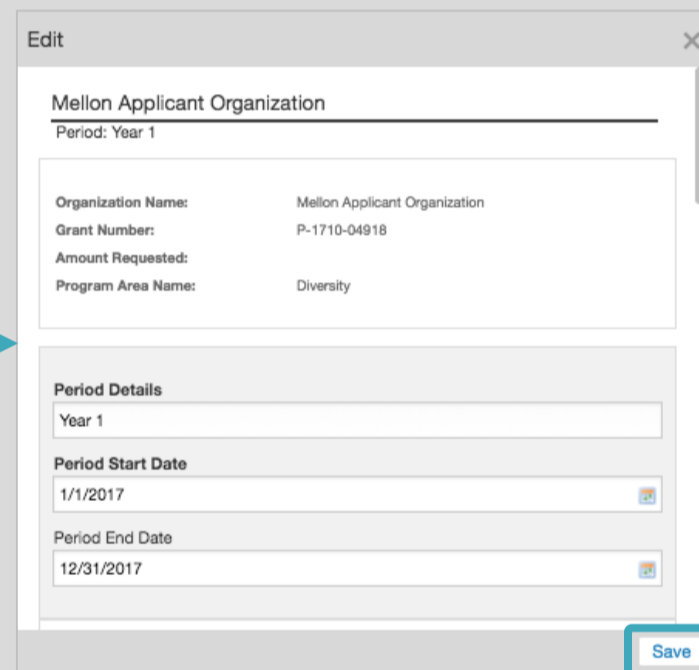
1. In the menu on the left, select **Proposals → To Edit**.
2. The proposals will display in a list. To view the proposal detail, select the relevant **proposal record** in the list. The full proposal detail will appear to the right.
3. At the top of the proposal, information from Foundation staff appears for review in a blue box:
 - **Comments to Applicant**, provides instructions for required edits
 - **Response Due By** date



2 COMPLETE REQUESTED BUDGET EDITS

1. Within the proposal detail, navigate to the **Grant Budget** section, and find the **Budget Period** subsection.
2. Click the **blue pencil icon** to the right of the budget period you would like to edit.
3. In the budget period pop-up window, complete requested edits to the budgeted amounts.
4. Click **Save**.

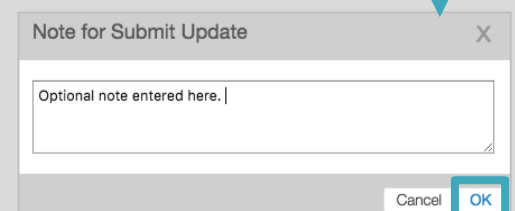
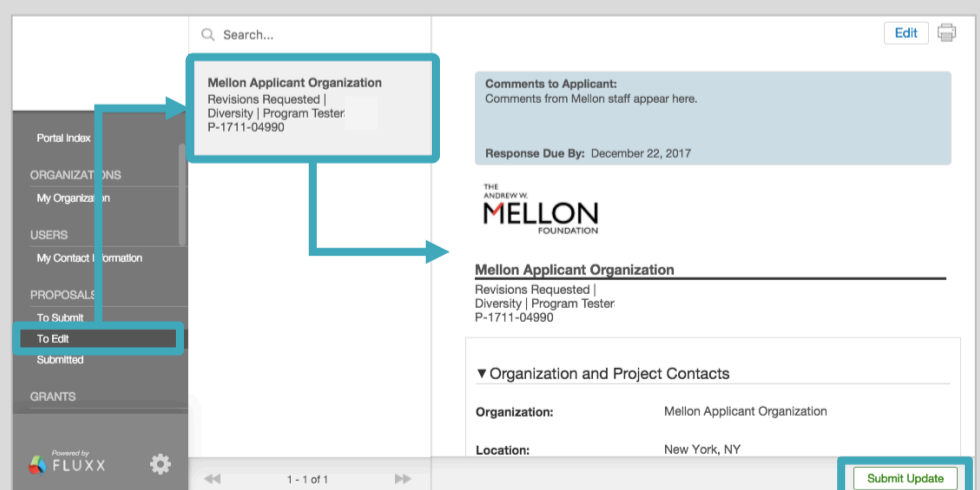
Budget Period	Budget	Actual	Variance
Year 1: 1/1/2017 to 12/31/2017	253,000	0	-253,000
Total	253,000	0	-253,000



3 SUBMIT BUDGET REVISIONS TO THE FOUNDATION

After saving your budget edits, you need to submit the proposal record to the Foundation for review.

1. In the menu on the left, select **Proposals → To Edit**.
2. The proposals will display in a list. To view the proposal detail, select the relevant **proposal record** in the list. The full proposal detail will appear to the right.
3. Click **Submit Update**.
4. In the **Note for Submit Update** pop-up window, you may include an optional note to the Foundation.
5. Click **OK**.



Your proposal is now with the Foundation for review and will appear under **Proposals → Submitted**.