

M GRANTEE PORTAL: Request Modification

Grantees seeking to modify a grant should send a brief email to program staff summarizing the proposed modification. Program staff will review and decide whether to invite a modification request through the portal. If invited, the grantee will receive an email notification from the portal to log in and submit more information.

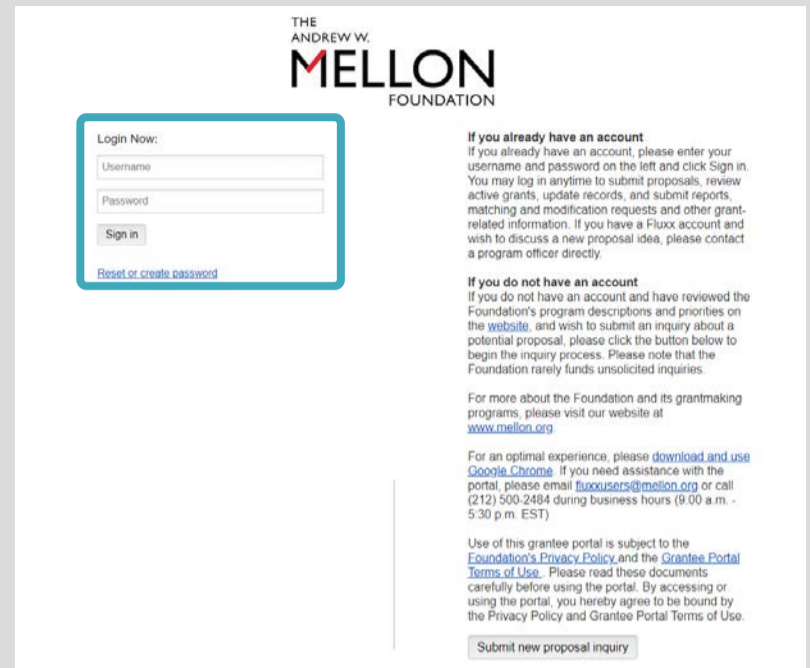
1 LOG IN TO THE GRANTEE PORTAL

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.

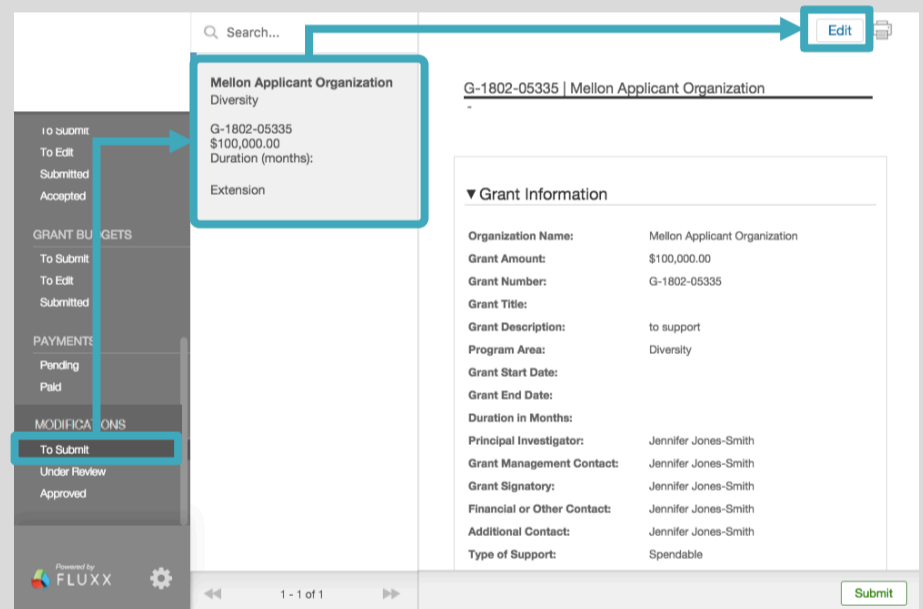
Assistance: For technical support, please contact Foundation staff at fluxxusers@mellon.org or call (212) 500-2484 during business hours (9:00 a.m. – 5:30 p.m. EST). You should expect a response to your email within three business days. For program-related questions, please contact program staff.



2 LOCATE MODIFICATION RECORD

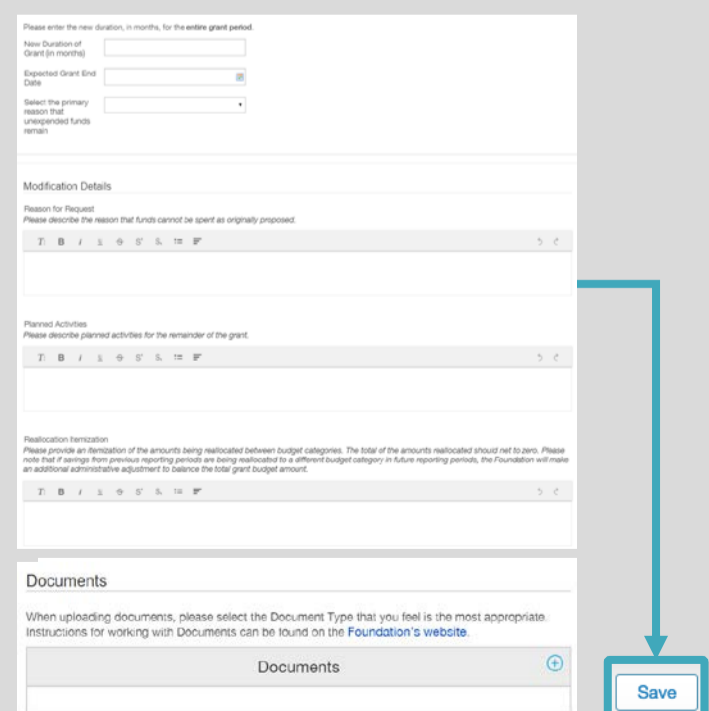
1. In the menu on the left, select **MODIFICATIONS** → **To Submit**.
2. The newly requested or proposed modifications will display in the list. To view the modification detail, select the relevant **modification record** in the list. The full modification detail will appear to the right.
3. On the modification detail, click **Edit** in the upper right corner.

Please note: The modification request will only appear in the portal once it has been invited by a Foundation staff member. If you log in and do not see the modification request, please contact Foundation staff at fluxxusers@mellon.org or call (212) 500-2484.



3 COMPLETE MODIFICATION RECORD

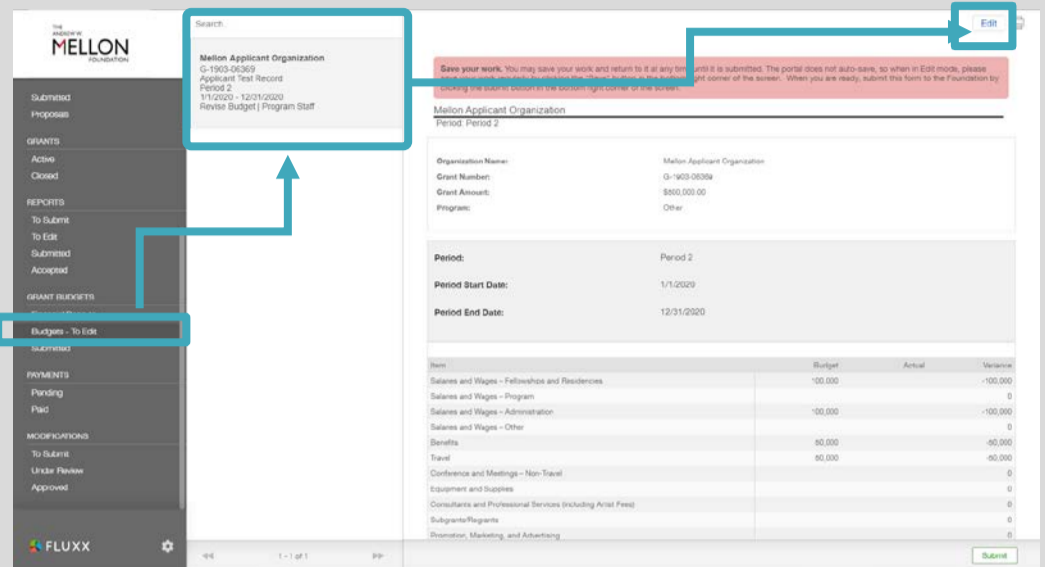
1. Complete the following sections:
 - **Modification Details**
 - Reason for Request
 - Planned Activities
 - Reallocation Itemization (if budget reallocation)
 - **Documents**, upload if requested
2. Click **Save**.
3. If a revised budget is requested:
 - **For grants approved prior to April 2018**, please upload a revised budget spreadsheet to the **Documents** section, then proceed to **Step 7**.
 - **For grants approved from April 2018 onward**, please proceed to **Step 4**.
4. If no budget revisions requested, please proceed to **Step 9**.



FOR GRANTS APPROVED FROM APRIL 2018 ONWARD WITH BUDGET REVISIONS

4 LOCATE BUDGET PERIODS TO REVISE

1. In the menu on the left, select **GRANT BUDGETS** → **Budgets – To Edit**.
2. The grant budget periods that are available to revise will display in the list. Select the appropriate **grant budget record** in the list. The full grant budget detail will appear to the right.
3. On the grant budget period detail, click **Edit** in the upper right corner.



5 REVISE AND SUBMIT RELEVANT BUDGET PERIODS

1. Enter any revisions needed to the grant budget period. These may include the following:
 - **Period**, update period name, if changed e.g., Year 1 or Year 2
 - **Period Start Date**, if changed
 - **Period End Date**, if changed
 - **Budget**, for each expenditure category
2. Click **Save**.
3. Click **Submit** to send your budget revisions to the Foundation for review.
4. Repeat the instructions above for each budget period requiring revision.

Note: if adding new optional categories, please add each new category to each period being revised, even if no expenditure is anticipated in that period.

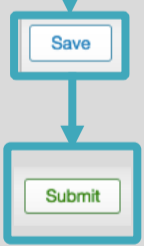
For more information on completing financial reports, see the [Financial Reports Guide](#).

Please enter the name of the budget period (e.g., Period 1, Period 2 or Year 1, Year 2, etc.) and start and end dates. Budget periods should each be one year long, although the length of the first and/or last budget period may vary. Please discuss appropriate budget periods with foundation staff.

Period:
 Period Start Date:
 Period End Date:

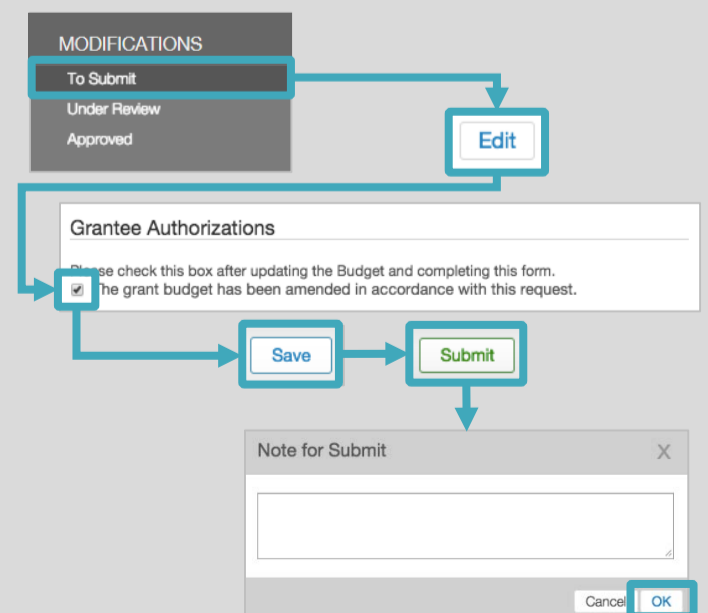
Item	Budget	Actual
Salaries and Wages – Fellowships and Residencies	100,000.00	100,000.00
Salaries and Wages – Program	150,000.00	150,000.00
Salaries and Wages – Administration		
Salaries and Wages – Other		
Benefits		
Travel	2,000.00	2,000.00
Conference and Meetings – Non-Travel		
Equipment and Supplies	1,000.00	
Consultants and Professional Services (including Artist Fees)		
Subgrants/Regrants		
Promotion, Marketing, and Advertising		
Occupancy Costs		
Optional (click to edit)		
Optional (click to edit)		
Optional (click to edit)		
Optional (click to edit)		
Optional (click to edit)		

Budget Period Notes
Please provide any specific notes regarding changes within budget categories in the space below



6 SUBMIT MODIFICATION REQUEST TO THE FOUNDATION

1. In the menu on the left, click **MODIFICATIONS** → **To Submit**.
2. New modifications will display in the list. To view the modification detail, select the relevant **modification record** in the list. The full grant budget detail will appear to the right.
3. Click **Edit**.
4. Go to the **Grantee Authorization** section. **Check the box**: The grant budget has been amended in accordance with this request.
5. Click **Save**.
6. Click **Submit**.
7. In the **Note for Submit** pop-up window, you may include an optional note for Foundation staff.
8. Click **OK**.



FOR GRANTS APPROVED PRIOR TO APRIL 2018 WITH BUDGET REVISIONS

7 UPLOAD REVISED BUDGET SPREADSHEET

Follow these steps if you have not already uploaded your revised budget spreadsheet as outlined in Step 4.

1. On your **Modification** record, click **Edit**.
2. Scroll to the Modifications Details section and find the **Documents** subsection. Click the “+” sign to upload your revised budget spreadsheet.
3. Click **Add files** and locate the file on your computer.
4. Select “**Revised Budget**” from the document type dropdown field.
5. Click **Start upload**.
6. When the upload is complete, the status displays **100%**. Click the **X** to close the pop-up window.

Modification Details

Documents

When uploading documents, please select the Document Type that you feel is the most appropriate. Instructions for working with Documents can be found on the [Foundation's website](#).

Documents +

Upload files X

Select or drag files then start upload

Filename	Size	Status
Revised Budget Spreadsheet.xlsx	25 KB	0% -

Add files Start upload 25 KB 0%

8 SUBMIT MODIFICATION REQUEST TO THE FOUNDATION

1. In the menu on the left, click **MODIFICATIONS → To Submit**.
2. New modifications will display in the list. To view the modification detail, select the relevant **modification record** in the list. The full grant budget detail will appear to the right.
3. Click **Edit**.
4. Go to the **Grantee Authorization** section. **Check the box:** The grant budget has been amended in accordance with this request.
5. Click **Save**.
6. Click **Submit**.
7. In the **Note for Submit** pop-up window, you may include an optional note for Foundation staff.
8. Click **OK**.

MODIFICATIONS

- To Submit
- Under Review
- Approved

Edit

Grantee Authorizations

Please check this box after updating the Budget and completing this form. The grant budget has been amended in accordance with this request.

Save **Submit**

Note for Submit X

Cancel **OK**

FOR GRANTS WITH NO BUDGET REVISIONS

9 SUBMIT MODIFICATION REQUEST TO THE FOUNDATION

1. In the menu on the left, click **MODIFICATIONS → To Submit**.
2. New modifications display in the list. To view the modification detail, select the relevant **modification record** in the list.
3. Click **Submit**.
4. In the **Note for Submit** pop-up window, you may include an optional note for Foundation staff.
5. Click **OK**.

MODIFICATIONS

- To Submit
- Under Review
- Approved

Submit

Note for Submit X

Cancel **OK**