If your organization is scheduled to receive a payment, Foundation staff may request confirmation of your organization’s bank information. In that event, staff will send an email to the Banking Information Contact requesting confirmation of the banking 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 device.

   1. Go to [https://mellon.fluxx.io](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 ORGANIZATION RECORD**

   The bank information for your organization is available on your organization record.

   1. In the menu on the left, click **ORGANIZATIONS → My Organization.**
   2. To view your organization, select your **organization** record in the list. The full organization detail will appear to the right.
   3. To Edit the organization detail, click **Edit** in the upper right corner.

3. **REVIEW BANK INFORMATION**

   1. Within your organization record, scroll to the **Organization Bank Account Summary** section.
   2. Review the information in the table displayed. To confirm the account shown is correct, proceed to **Step 4**. If the account details are not shown, proceed to **Step 5**.
GRANTEE PORTAL: Confirm Bank Information, continued

4 CONFIRM EXISTING BANK INFORMATION

To confirm that the account details are correct:
1. Scroll to the Banking Information section.
2. In the Bank Accounts subsection, click the Bank Name link.
3. In the Bank Account pop-up window, scroll to enter the name, title and email of the person confirming the bank account information and the date of that confirmation.

5 ADD NEW BANK INFORMATION, IF NEEDED

If the organization’s bank account is not listed, you may add it to the organization record.
1. Scroll to the Banking Information section, and click the title to expand the section.
2. Click the “+” sign in the Bank Accounts subsection.
3. In the Add a Bank Account pop-up window, enter the bank information:
   • Name on Bank Account
   • Bank Name
   • Bank Address
   • Bank Account Number, if IBAN, enter here
   • ABA or Routing Number/Swift Code (WIRE ONLY)
   • For international, select US Corresponding Bank
   • Confirmed by, name of person confirming the bank details
   • Title of Person Confirming Bank Account
   • Email of Person Confirming Bank Account
   • Date Confirmed
   • Comments, if applicable
4. Click Save.
5. Go to Step 6.

Foundation staff may contact the person who confirmed the banking information if there are questions about the account.

6 SUBMIT THE RECORD TO THE FOUNDATION

Once you have confirmed that your organization’s bank information is correct, please submit the record back to the Foundation for review. You may also periodically be prompted by the Foundation to review and confirm this information even when there are no changes to be made.

1. To send the bank information to the Foundation, click Submit Update at the bottom right of your Organization record.
2. On the Note for Submit Update pop-up window, you may include an optional note for Foundation staff.
3. Click OK.