

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>
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**.

| ID | Bank Name | Account Number | Routing Number | IBAN Ref. Number | Swift BIC Code |
|-------|-------------------------------|----------------|----------------|------------------|----------------|
| 49859 | Mellon Applicant Bank Account | 1234567 | 12345678 | | |

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.
4. Click **Save**. Go to **Step 6**.

▼ Banking Information

To confirm or update banking information, please click on the link below to open the Bank Account form. Check the account information displayed in the form and enter or update the name and contact details of the person in your organization who has confirmed the account details, along with the date confirmed and click Save.

To add a new account, please click on the "+" icon to the right to open the Bank Account form. Enter the requested information and click Save.

When the account information has been confirmed, please click the Submit Update button below to submit the account confirmation to the Foundation.

Bank Accounts +

Bank Name: Mellon Applicant Bank Account - 1234567

Save

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.

Bank Accounts +

Add a Bank Account

Mellon Applicant Organization

ID:

Bank Account Information

In addition to reviewing or adding the bank account information in the fields below, please also complete the Confirmation Contact section.

Name on Bank Account

Bank Name

Bank Address

Bank Account Number/IBAN

ABA or Routing Number/Swift Code (WIRE ONLY)

US Corresponding Bank (for non-US banks only)

Confirmation Contact

Please enter or update the name and contact information of the person in your organization who has confirmed the bank account details.

Confirmed by

Title of Person Confirming Bank Account

Email of Person Confirming Bank Account

Date Confirmed

mm/dd/yyyy

Comments

Save

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**.

ORGANIZATIONS

My Organization

Submit Update

Note for Submit Update

Cancel OK