GRANTEE PORTAL: Confirm Bank Information

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.

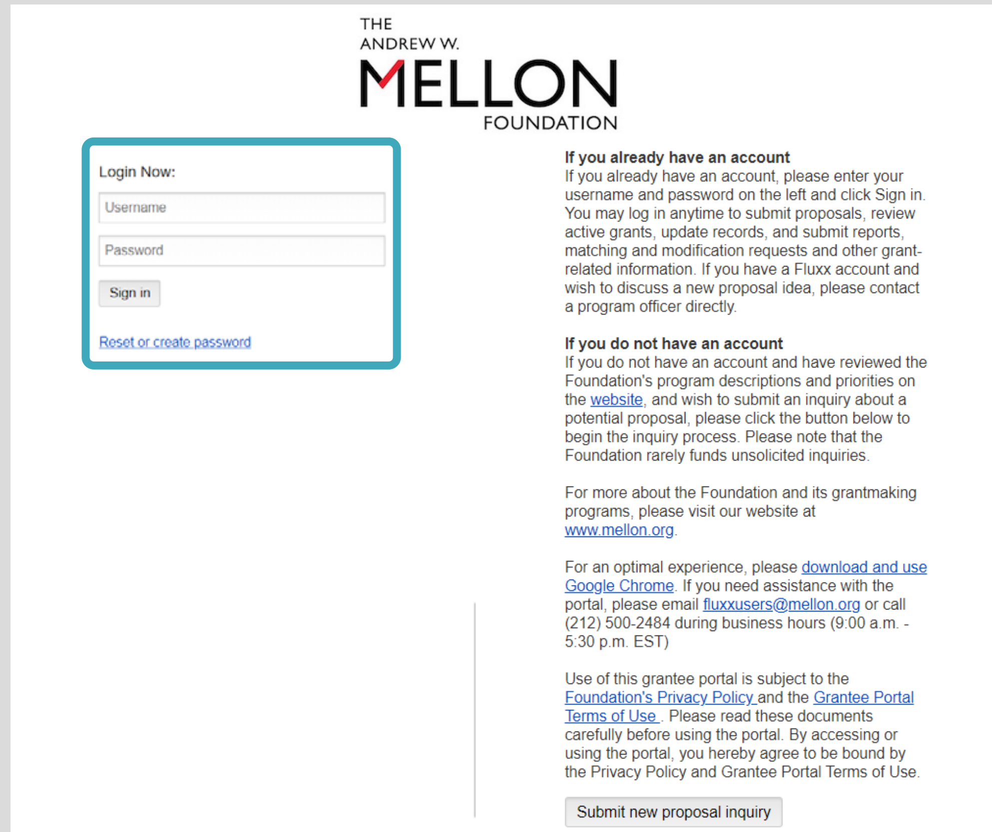
1 LOG IN TO THE GRANTEE PORTAL

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.*

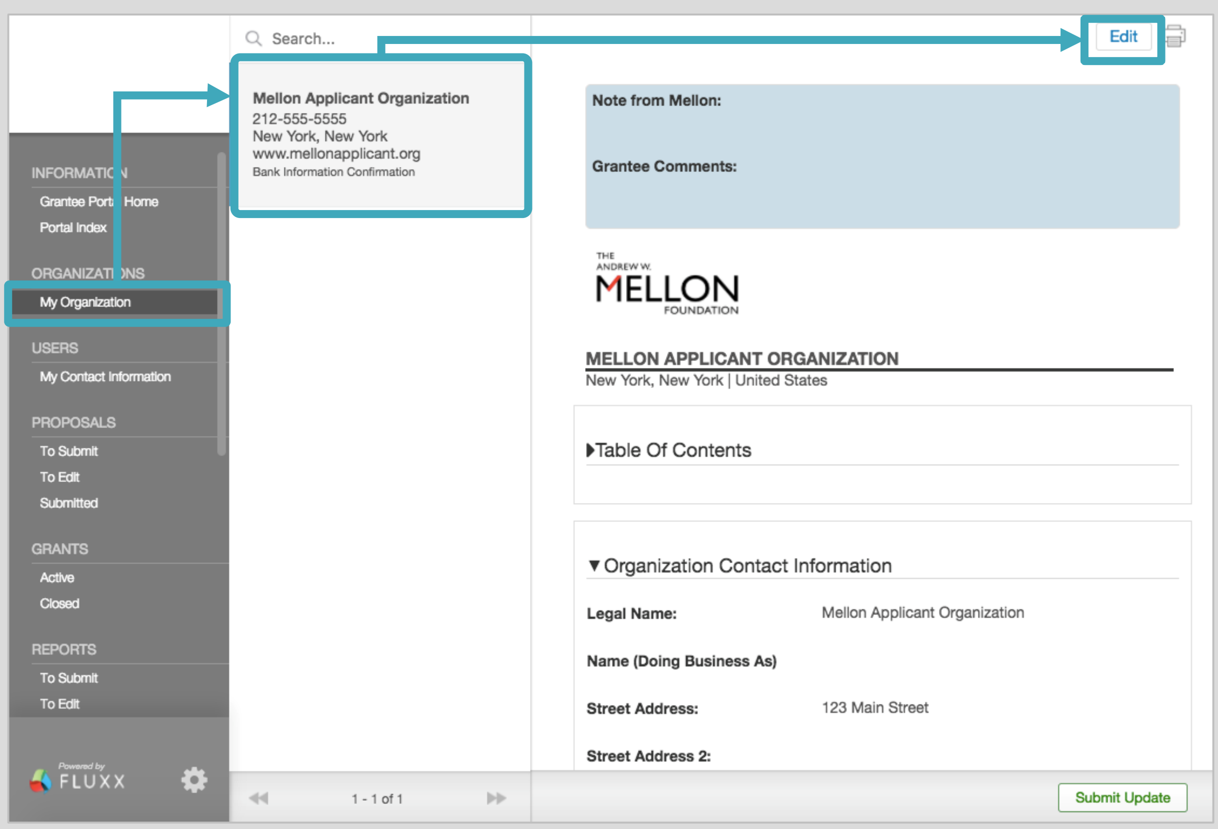
Assistance: For technical support, please contact Foundation staff at fluxxusers@mellon.org or call (212) 500-2484 during business hours (9:00 a.m. – 5:30 p.m. EST). You should expect a response to your email within three business days. For program-related questions, please contact program staff.



2 LOCATE ORGANIZATION RECORD

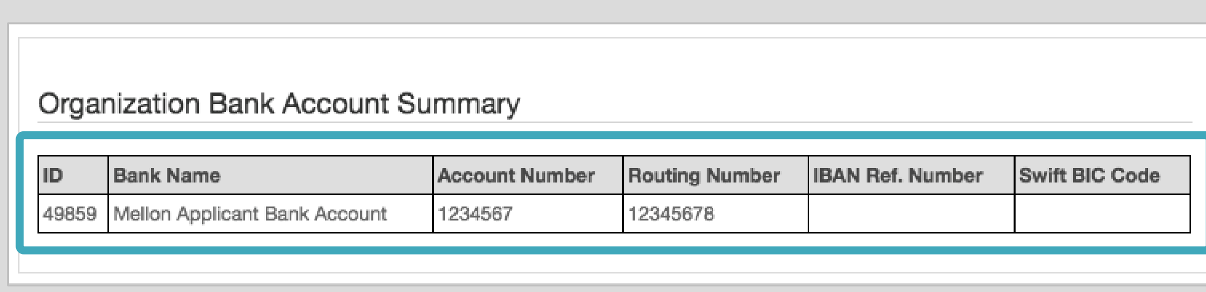
The bank information for your organization is available on your organization record.

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.**



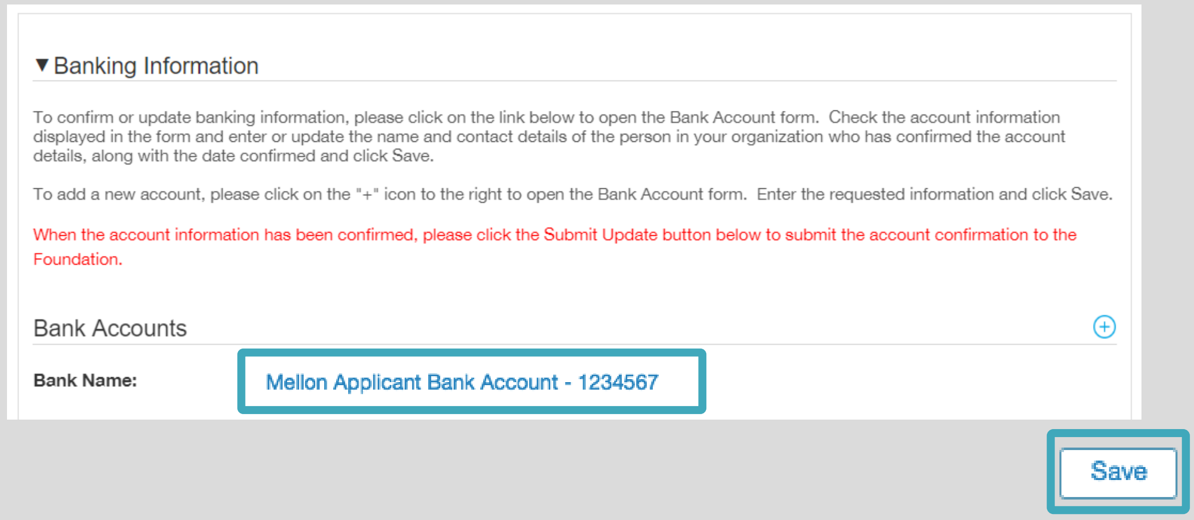
Organization Bank Account Summary

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.**

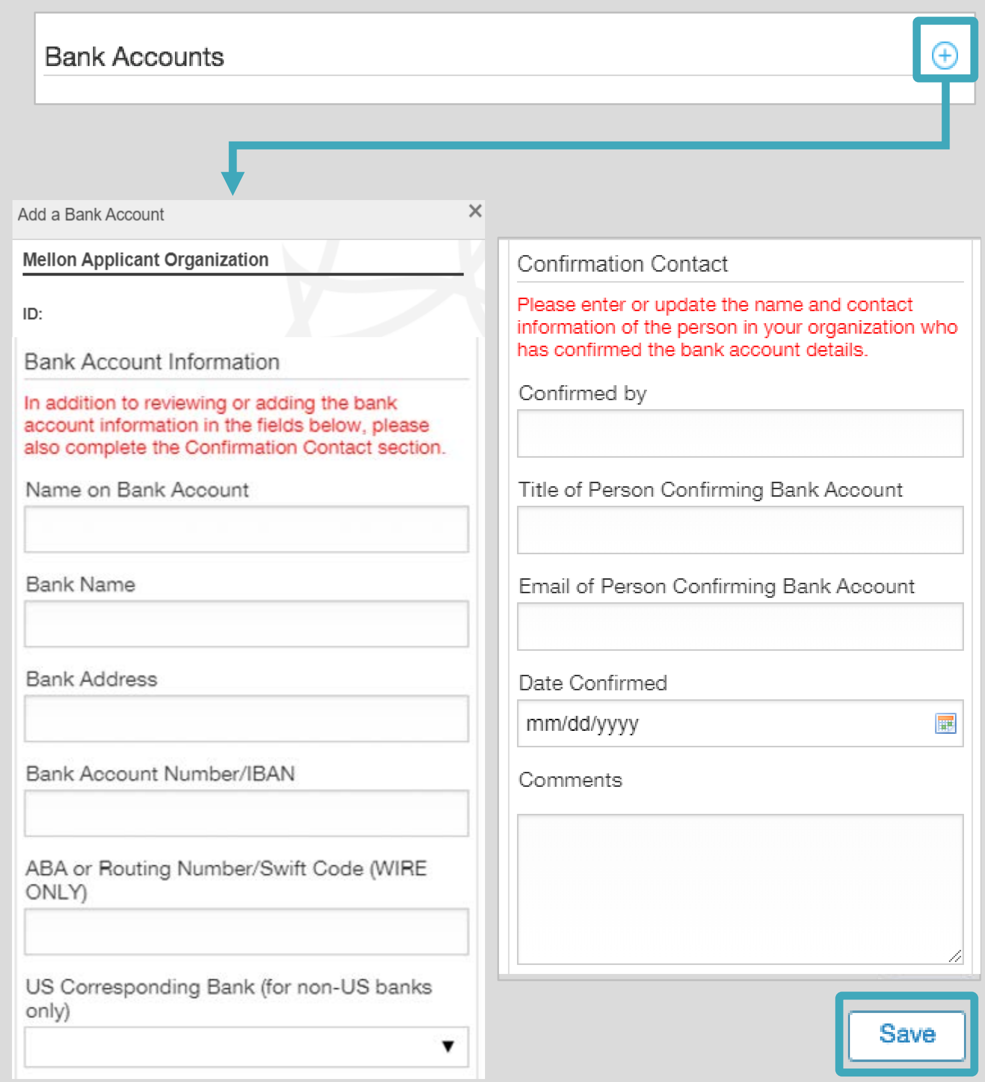


5 ADD NEW BANK INFORMATION, IF NEEDED

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**.