Grant Portal User Guide

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To access the grant portal, go to https://ascendium.fluxx.io/
To access the Portal, each user must have an individual account with a unique username and password. For more information, see Ascendium’s Portal Terms of Use.

1. NEW USERS: REGISTER NOW AT https://ascendium.fluxx.io/
   
   Note that Ascendium’s grant portal is optimized for Google Chrome. For ease of use, install Google Chrome on your computer.
   
   If this is your first time visiting Ascendium’s grant portal, click the Register Now button to register.

2. COMPLETE THE REGISTRATION FORM
   
   **Organization Information:**
   - Enter your Organization Information.
   
   **Contact Information:**
   - Complete all fields, including First Name, Last Name and E-mail. Your email address is required. This email address should be unique to you in your role at your organization, as this will become your username for logging into the system.
   
   Once all information is complete, click Submit Request. Your registration request will be received by Ascendium, and they will create your account within three business days. New users will receive an email with login information once an account is created.
   
   For technical assistance with registering on the grant portal, email grantportalsupport@ascendiumeducation.org.

3. REGISTERED USERS: LOG IN TO THE GRANT PORTAL AT https://ascendium.fluxx.io/ WITH YOUR USERNAME AND PASSWORD
   
   Note that Ascendium’s grant portal is optimized for Google Chrome. For ease of use, install Google Chrome on your computer.
   
   1. If you have already registered for Ascendium’s grant portal, enter your Username (email address) and Password.
   2. Click Sign In.
   3. You will be redirected to the grant portal and will see the portal welcome page.
4 EMAIL FOR NEW USERS

1. New users will receive an email from do-not-reply@fluxx.io. The email will contain an assigned Username and a link to set a new password.
2. The Username will be your email address.
3. The Password must be a minimum of 8 characters and must contain upper and lower case letters, and a number.
4. Click on the link for the grant portal to https://ascendium.fluxx.io/

   If you do not receive an email, contact Ascendium staff at grantportalsupport@ascendiumeducation.org.

5 CHANGE YOUR PASSWORD

1. To change your assigned password, click Settings (the gear icon) in the bottom left corner.
2. Select Change Password.
3. Enter your assigned password from the new user email. Create a new password and enter it a second time to confirm.
4. Your new password must be at least 8 characters and contain both upper and lower case letters and at least 1 number.
5. Click Change Password. You will receive an on-screen message that you have Successfully changed password.
6. Click Back to Main Menu to return to the grant portal.

Save this password in a secure manner.

In the future, use your Username (email address) and this password to log in to the portal at https://ascendium.fluxx.io/
How to Reset a Password

To access the Portal, each user must have an individual account with a unique username and password. For more information, see Ascendium’s Portal Terms of Use.

1 ACCESS GRANT PORTAL

Through the grant portal, invited organizations can submit new applications and reports. If you already have an account but would like to reset your password, follow the instructions below to log in to the portal and change your password.

Note: Users that are not currently registered will need to register by clicking the Register Now button.

Note: Ascendium’s grant portal is optimized for Google Chrome. For ease of use, install Google Chrome on your computer.

2 RESET OR CREATE PASSWORD

1. Open the grant portal through the following link: https://ascendium.fluxx.io/
2. Click Reset or create password
3. Enter your email address, and click Submit.
4. You will receive an email from do-not reply@fluxx.io.
5. Click on the link provided in the email.

If you do not receive an email, contact Ascendium staff at grantportalsupport@ascendiumeducation.org.

3 CREATE PASSWORD AND LOG IN

1. Create a new password for Fluxx, and enter it a second time to confirm it.
2. Your password must be at least 8 characters and contain both upper and lower case letters and at least 1 number.
3. Click Set Password and Log In.
4. You will be redirected to the grant portal and will see the portal welcome page.

Save this password in a secure manner.

In the future, use your Username (your email address) and this password to log in to the portal at https://ascendium.fluxx.io/
How to Update Contact Information

To access the Portal, each user must have an individual account with a unique username and password. For more information, see Ascendium’s Portal Terms of Use. Note: If your organization information or primary contact has changed, contact Ascendium at grantportalsupport@ascendiumeducation.org.

1 LOG IN TO THE GRANT PORTAL

Note that Ascendium’s grant portal is optimized for Google Chrome. For ease of use, install Google Chrome on your computer.

1. Go to https://ascendium.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, contact Ascendium staff at grantportalsupport@ascendiumeducation.org. You should expect a response to your email within two business days. For program-related questions, contact a Program Officer.

2 LOCATE USER CONTACT

1. To update your contact information, go to the Contacts ➔ Contacts section.
2. Select the person requiring edits from the list. Click Edit.

Note: To update organization information, contact Ascendium staff at grantportalsupport@ascendiumeducation.org.

3 COMPLETE CONTACT UPDATES

1. Select from the Login requested by organization dropdown, if applicable.
2. Complete edits under the Contact Information section, where applicable.

Note: Only the following fields can be updated for a Contact:

- Job Title
- Department
- Email (required)
- Business Phone and Business Extension
- Mobile Phone
- Check this box if your work address is different from the organization address: If this box is checked complete the Mailing Details (if different from organization) section that populates.

3. When all edits are complete, click Save.

Note: If you need to change a contact or re-assign the primary contact on an approved grant, contact Ascendium staff at grantportalsupport@ascendiumeducation.org to have a new contact record added to the grant.
How to Complete an LOI or Proposal

Applicants may receive an email notification inviting submission of a Letter of Inquiry or Full Proposal. Refer to the Application Instructions Section for additional information.

1 LOG IN TO THE GRANT PORTAL

Note that Ascendium’s grant portal is optimized for Google Chrome. For ease of use, install Google Chrome on your computer.

1. Go to https://ascendium.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, contact Ascendium staff at grantportalsupport@ascendiumeducation.org. You should expect a response to your email within two business days. For program-related questions, contact your Ascendium Program Officer.

2 LOCATE INVITED LOI/PROPOSAL

1. In the main menu, select Applications → To Submit.
2. The list displays invited LOIs and Proposals. To view the application detail, select the relevant application record in the list. Full detail will subsequently appear.
3. On the application detail, click Edit in the top right corner.

3 COMPLETE LOI/PROPOSAL

1. Use the Table of Contents to navigate to different sections of the application.
2. You may click on any of the Table of Contents links near the top of your Application record to navigate and jump to different sections of the application.
3. Complete all sections, as applicable. Note: Full proposals will be required to submit a budget and other forms. For more information on completing budgets, see the section on How to Revise a Budget.
4. Click Save to save your work as you go. Saving does not submit the application to Ascendium. See Step 4 for how to submit. Note: There is no auto-save in this portal, so save your work often by clicking Save.

4 SUBMIT LOI/PROPOSAL TO ASCENDIUM

1. When the application record is complete and ready to submit, click Submit. Note: You have the option to Withdraw an application prior to submitting.
2. In the Note for Submit pop-up box, click OK to submit your application. Disregard the Note text field. Ascendium staff will not read these notes.
3. Click OK to submit.

The LOI/Proposal is now with Ascendium staff for review and will appear under Submitted.

Note: Your Ascendium Program Officer may send the submitted LOI/Proposal back to you with additional comments or questions. If so, refer to How to Edit an LOI or Proposal.
How to Revise an LOI or Proposal

Ascendium staff may require that applicants revise an LOI or Proposal. In this event, you will receive an email notification that a revision is sought and the application will be available for edit in the grant portal. Details about the revisions required are displayed on the application. Refer to the Application Instructions section for more information.

1. LOCATE APPLICATION REVISIONS
   1. In the main menu, click Applications → To Edit.
   2. Applications will display in a list. To view the application detail, select the relevant application record in the list. Full detail will subsequently appear.
   3. On the application detail, click Edit in the top right corner.

2. COMPLETE REVISIONS REQUIRED
   1. In the Comments to Applicant note at the top of the application detail, Ascendium staff may have provided comments detailing application edits they are requiring.
   2. Use the Table of Contents to navigate to different sections of the application.
   3. Update all sections of the application as required.
   4. Click Save.

   Saving does not submit the application to Ascendium. See Step 3 for how to submit your edits for further review.

   Note: There is no auto-save in this portal, so save your work often by clicking Save.

3. SUBMIT REVISIONS TO ASCENDIUM
   1. When the application edits are complete and ready to submit to Ascendium, click Submit Revisions.
   2. In the Note for Submit pop-up box, click OK to submit your application. Disregard the Note text field. Ascendium staff will not read these notes.
   3. Click OK to submit.

   The application is now with Ascendium for review and will appear under Applications → Submitted.
How to Upload Documents

When completing information on a record, applicants and grant partners will be asked to upload required documents.

1. **UPLOAD REQUIRED DOCUMENT**

   1. On a record, scroll to a required document under the **Documents** section.
   
   Upload a document by clicking the **+(Add) sign**.

2. In the pop-up window, click **Add files** to browse for the document on your computer or drag and drop the document into the **Upload Files** pop-up window.

   **Please note:** You may only upload one required document at a time.

3. Click **Start Upload**. When the upload is complete, the status displays **Upload Complete** at 100%.

4. Click the **X** to close the pop-up window.

5. The document will appear in the **Documents** section with a Document Type label, e.g., Third Party Audited Financials.

   - **Add New Version of Document:** Allows you to upload a new version of your document by clicking this icon.
   - **Preview Document:** Allows you to preview your document in the browser.
   - **Edit Document:** Edit the Document Type associated with the document.
   - **Delete Document:** Allows you to delete the document unless the grant is approved.
How to Upload Documents

When providing information on a record, applicants and grant partners may choose to upload additional documents.

1. On a record, scroll to the Documents section. Add documents to the Attached Documents section by clicking the + (Add) sign.

2. In the pop-up window, click Add files to browse for the document on your computer or drag and drop the document into the Upload Files pop-up window.

3. Use the dropdown to the right of the file name to select the Document Type.
   Please note: You may upload multiple files at one time.
   Please be sure to confirm that you have selected the correct document type for each document after adding the files.

4. Click Start Upload. When the upload is complete, the status displays Upload Complete at 100%.

5. Click the X to close the pop-up window.

6. The document will appear in the Documents section with a Document Type label, e.g., Other Relevant Materials.

   Add New Version of Document: Allows you to upload a new version of your document by clicking this icon.

   Preview Document: Allows you to preview your document in the browser.

   Edit Document: Edit the Document Type associated with the document.

   Delete Document: Allows you to delete the document unless the grant is approved.
1 **INVITED PROPOSAL**

If Ascendium invites your organization to submit a proposal, you will receive an email requesting that you return to the grant portal. You will find your application to complete under the grant portal section for Applications → To Submit. **Note:** There is no auto-save in the portal, so save your work often by clicking Save. Ascendium staff will be able to review draft language once saved, but will only do so if the applicant/grant partner requests feedback on the draft before submission.

2 **ORGANIZATION INFORMATION**

The Organization Information section contains the applicant information and contacts for the proposal. To assign a proposal contact role, e.g., Additional Contact 2, select the name if it appears in the drop down. Contacts already associated with your organization will appear in the drop downs. You may add a new contact by clicking Add New. **Note:** Only one individual can be assigned to each role. The same individual can have more than one role on the proposal. The contacts named in this section will have access to the proposal record in the system and will receive automated email alerts.

3 **TABLE OF CONTENTS**

The Table of Contents may be used to navigate to various sections of the application. Click on a section name to jump to a particular part of the application and view the questions for that section. This Table of Contents will change and additional sections may appear as more details are added to the application.
Application Instructions

4 APPLICATION INFORMATION

The Application Information section includes summary information about the proposal, including a short project title, the amount requested in US dollars and the length of time needed to complete the supported activities. Include a clear and concise description of the grant. You may edit the following sections: Project Title, Amount Requested, Grant Description, Grant Start Date, Grant End Date and List of Other Funders. Note: You will not be able to edit the Proposal Due At field.

Note: Some fields throughout the Application Information section, including “Proposal Due At,” will pre-populate as determined by your Ascendium Program contact and cannot be edited.

Some fields will provide additional instructional text, word and/or character limits, including “Grant Description.”
NARRATIVE QUESTIONS

The **Narrative Questions** section consists of a set of questions about the proposed work.

Click on the link to **print** a list of all narrative questions.

**Note:** Questions 1-6 are included as part of the LOI stage, if applicable. These fields will pre-populate based on the information submitted during the LOI stage. All fields under the Narrative Questions section can be edited.
**GRANT BUDGET AND BUDGET NARRATIVE**

The **Grant Budget** and **Budget Narrative** sections contain information about the budget as it relates to the proposed grant. For more information on revising and submitting budgets, see the **How to Submit a Proposal Budget** and **How to Revise a Budget** sections.

### Grant Budget

Click the “+” icon to the right of “Grant Budgets” to add each individual budget required period. To edit an existing budget period, click the “Edit” icon to the right of the Value column.

After you complete each Budget Period, scroll down to the Documents section. You will need to upload a line-item budget for your project or grant that highlights Ascendium’s supported efforts. This can be in whatever format is most useful for your project.

#### Grants Budgets

<table>
<thead>
<tr>
<th>Budget Period</th>
<th>Period 1: 9/1/2019 to 8/31/2019</th>
<th>Period 2: 9/1/2020 to 8/31/2020</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Budget</td>
<td>Actual</td>
</tr>
<tr>
<td>Period 1</td>
<td>115,000</td>
<td>0</td>
</tr>
<tr>
<td>Period 2</td>
<td>335,000</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>155,000</strong></td>
<td><strong>220,000</strong></td>
</tr>
</tbody>
</table>

#### Budget Snapshot

<table>
<thead>
<tr>
<th></th>
<th>Period 1 9/1/2019 to 8/31/2019</th>
<th>Period 2 9/1/2020 to 8/31/2020</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel</td>
<td>100,000</td>
<td>200,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel</td>
<td>10,000</td>
<td>6,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplies/Materials</td>
<td>5,000</td>
<td>4,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trainings/Meetings</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Expenses</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Indirect expenses</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Indirect allowance</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Budget Narrative

- **Please provide any category-specific notes in the fields below:**

  - **Personnel**: Includes personal salaries and applicable fringe benefits needed to deliver project services. In your budget narrative, use titles rather than specific names to identify positions and briefly describe each role. Enter consultant costs under Subcontractors.

    - **Total Budgeted**: $0.00
      - **Notes**:

  - **Travel**: Includes travel required to implement your proposed project, including but not limited to, airfare, mileage, vehicle rental and fuel costs. In your budget narrative, describe the purpose of travel.

    - **Total Budgeted**: $0.00
      - **Notes**:

  - **Supplies/Materials**: Includes supplies and materials needed to deliver direct project services.

    - **Total Budgeted**: $0.00
      - **Notes**:

- **Budget Information**

  Complete the budget below for each budget period. Label each budget period “Period 1”, “Period 2”, etc. The period start and end dates should align with your proposal.

  - **Budget Period**
  - **Period Start Date**
  - **Period End Date**

  - **Item** | **Budget** | **Actual**
  - **Personnel**
  - **Travel**
  - **Supplies/Materials**
  - **Trainings/Meetings**
  - **Other Expenses**
  - **Indirect expenses on above (not to exceed 15%)**
  - **Sub-Awards**
  - **Indirect allowance on sub-awards (based on the total sub-granted direct cost amount)**

  **Save**
7 DOCUMENTS: REQUIRED

The Documents section lists required documents to be uploaded. Each document is uploaded to the application using the + (Add) sign after the document name. The document type, e.g., Third Party Audited Financials, will automatically be assigned to the document upon upload.

For more instructions on how to upload documents, refer to the How to Upload Documents section.

8 DOCUMENTS: ADDITIONAL/OPTIONAL

Additional or optional documents can be uploaded using the + (Add) sign next to the Attached Documents box. Use the dropdown next to the file name to select the Document Type, e.g., Other Relevant Materials.
How to Submit Financial Information

Grant partners are required to complete a Financial Information Form, including complete and accurate financial and payment processing information. The form should be filled out by the Authorized Financial Contact and submitted through Ascendium’s grant portal at the same time as the signed grant agreement is due.

*Note:* The Financial Information Form will only be viewed by Ascendium’s Finance and Grants Management teams.

1. **LOG IN TO THE GRANT PORTAL**
   
   *Note that Ascendium’s grant portal is optimized for Google Chrome. For ease of use, install Google Chrome on your computer.*
   
   1. Go to [https://ascendium.fluxx.io/](https://ascendium.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, contact Ascendium staff at [grantportalsupport@ascendiumeducation.org](mailto:grantportalsupport@ascendiumeducation.org). You should expect a response to your email within two business days.

2. **LOCATE FINANCIAL INFORMATION RECORD**
   
   When it is time to submit a Financial Information Form, be sure to select the form with **Status: New**.
   
   1. In the main menu, select Reports → Financial Info.
   2. A Financial Info form for each active grant displays in a list. To view the form detail for a new form for a new grant, select a form record in the list with the **Status: New**. On the form detail, click **Edit** in the top right corner.

3. **COMPLETE FINANCIAL INFORMATION FORM RECORD**
   
   1. Complete all sections displayed on the form. *Note:* The following fields in **bold** are required.
      - **Remittance email**, include an email address that may be shared and/or accessed by multiple contacts within your organization
      - **Would you like to enroll your organization in the ACH program?**, Yes/No dropdown. *Note:* If Yes, additional fields will be required including **Required Financial Institution Information** and **Acknowledgements**.
   2. Click **Save**.

   Saving does not submit the form to Ascendium. See **Step 4** for how to submit. *Note:* There is no auto-save in this portal, so save your work often by clicking **Save**.

4. **SUBMIT FINANCIAL INFORMATION FORM TO ASCENDIUM**
   
   1. When the form record is complete and ready to submit, click **Submit**.
   2. In the **Note for Submit** pop-up box, click **OK** to submit your application. Disregard the Note text field. Ascendium staff will not read these notes.
   3. Click **OK** to submit.

   The financial information form is now with Ascendium staff for review and will appear under Reports → Financial Info with the updated **Status: Under Review**. *Note:* The Financial Information form must be submitted prior to or at the same time as the signed Grant Agreement is due.
How to Revise Financial Information

Ascendium staff may request revisions to your Financial Information Form. You will receive an email notification that the form is available for editing in the portal. Details about the revisions requested are displayed on the form.

1. **LOCATE FORM REVISIONS REQUESTED**

   1. In the main menu, select Reports ➔ Financial Info.
   2. All Financial Info forms for active grants display in a list. To view the form detail for a form that requires revisions, select a form record in the list with the Status: Revisions Requested. Full detail will subsequently appear.
   3. On the form detail, click Edit in the top right corner.

2. **COMPLETE FORM REVISIONS REQUESTED**

   1. In the Comments to Applicant note at the top of the form detail, Ascendium staff may have provided comments detailing requested revisions.
   2. Use the Table of Contents to navigate to different sections of the form record.
   3. Enter revisions needed on the form record.
   4. Upload any attachments, if relevant.
   5. Click Save.

   Saving does not submit the form to Ascendium. See Step 3 for how to submit your updates for further review.

   *Note: There is no auto-save in this portal, so save your work often by clicking Save.*

3. **SUBMIT REVISED FORM TO ASCENDIUM**

   1. When the form edits are complete and ready to submit to Ascendium, click Submit.
   2. In the Note for Submit pop-up box, click OK to submit your application. Disregard the Note text field. Ascendium staff will not read these notes.
   3. Click OK to submit.

   The form is now with Ascendium for review and will appear under Reports ➔ Financial Info with the updated Status: Under Review.
How to Submit a Report

Grant partners are required to submit narrative and budget reports on the progress of the grant. Narrative report types include Interim Report and Final Report. Reports will be submitted through Ascendium’s grant portal. For more information on completing budget reports, see the How to Submit a Proposal Budget and How to Revise a Budget sections.

1 LOG IN TO THE GRANT PORTAL

Note that Ascendium’s grant portal is optimized for Google Chrome. For ease of use, install Google Chrome on your computer.

1. Go to https://ascendium.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, contact Ascendium staff at grantportalsupport@ascendiumeducation.org. You should expect a response to your email within two business days. For program-related questions, contact a Program Officer.

2 LOCATE REPORT RECORD

When it is time to submit a report, be sure to select the report that corresponds with the next upcoming report due date.

1. In the main menu, select Reports → To Submit.
2. All reports for active grants display in a list. To view the report detail, select a report record in the list. Full detail will subsequently appear.
3. On the report detail record, click Edit in the top right corner.

3 COMPLETE REPORT RECORD

1. Complete all sections displayed on the report form. For more information on each type of report, see Page 3 of this guide.
2. Click Save.

Saving does not submit the report to Ascendium. See Step 4 for how to submit. Prior to submitting a report, check that you have completed the Grantee Budgets → Actuals to Submit section. For more information on completing budget reports, see the How to Submit a Budget Report section.

Note: There is no auto-save in this portal, so save your work often by clicking Save.

4 SUBMIT REPORT TO ASCENDIUM

1. When the report record is complete and ready to submit, click Submit.
2. In the Note for Submit pop-up box, click OK to submit your application. Disregard the Note text field. Ascendium staff will not read these notes.
3. Click OK to submit.

The report is now with Ascendium staff for review and will appear under Reports → Submitted.

Note: Payments that are contingent upon approval of a report are only released upon approval of the report by Ascendium staff.
How to Revise a Report

Ascendium staff may request revisions to your reports. You will receive an email notification that the relevant report is available for editing in the portal. Details about the requested revisions are displayed on the report.

1. **LOCATE REPORT REVISIONS REQUESTED**
   1. In the main menu, select **Reports → To Edit**.
   2. All reports for active grants display in a list. To view the report detail, select a report record in the list. Full detail will subsequently appear.
   3. On the **report detail**, click **Edit** in the top right corner.

2. **COMPLETE REPORT REVISIONS REQUESTED**
   1. In the **Comments to Applicant** note at the top of the report detail, Ascendium staff may have provided comments detailing requested edits.
   2. Use the **Table of Contents** to navigate to different sections of the report record.
   3. Enter revisions needed on the report record.
   4. Upload any attachments, if relevant.
   5. Click **Save**.

   Saving does not submit the request to Ascendium. See **Step 3** for how to submit your updates for further review.

   **Note:** There is no auto-save in this portal, so save your work often by clicking **Save**.

3. **SUBMIT REVISED REPORT TO ASCENDIUM**
   1. When the report edits are complete and ready to submit to Ascendium, click **Resubmit**.
   2. In the **Note for Resubmit** pop-up box, click **OK** to submit your application. Disregard the Note text field. Ascendium staff will not read these notes.
   3. Click **OK** to submit.

   The report is now with Ascendium for review and will appear under **Reports → Submitted**.
How to Submit a Proposal Budget

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

1. **LOG IN TO THE GRANT PORTAL**

   Note that Ascendium’s grant portal is optimized for Google Chrome. For ease of use, install Google Chrome on your computer.

   1. Go to [https://ascendium.fluxx.io/](https://ascendium.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, contact Ascendium staff at grantportalsupport@ascendiumeducation.org. You should expect a response to your email within two business days. For program-related questions, contact a Program Officer.

2. **LOCATE APPLICATION**

   1. In the main menu, open **Applications ➔ To Submit**.
   2. The list displays invited applications. To view the application detail, select the relevant **application record** in the list. Full detail will subsequently appear.
   3. On the application detail, click **Edit** in the top right corner.

3. **NAVIGATE TO APPLICATION GRANT BUDGET SECTION**

   1. Within the application detail, navigate to the **Grant Budget** section, and find the **Grant Budgets** subsection.
   2. Click the **+ (Add)** sign to create a new budget period.
   3. Enter the following:
      - **Budget Period**, (e.g., Period 1, Period 2, etc.) required
      - **Period Start Date**, required
      - **Period End Date** (budget periods are typically one year in duration)
      - **Budget amounts** for relevant expenditure categories.
   4. Click **Save**.
   5. Totals will appear on the application record for each period after saving.
   6. Repeat these steps for each budget period associated with the application.

   **Note:** There is no auto-save in this portal, so save your work often by clicking **Save**.
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. You can also review the Budget Snapshot.

**4 EXPORT BUDGET PERIODS TO EXCEL**

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

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

*Note:* Any changes made to the exported Excel spreadsheet are not saved to the grant portal.

If there are changes to be made to the budget before submitting the application, go back into the grant portal to the **Budget Period** section. Click the **pencil (Edit)** icon for the relevant budget period. Update as needed, and click **Save**.

**5 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.
How to Submit a Proposal Budget

Enter the budget justification and submit the application to Ascendium for review.

6 ENTER BUDGET NARRATIVE

The budget narrative should describe and justify the cost assumptions for each expenditure category. The Total Budgeted displays based on the Grant Budget above each expenditure category notes field.

1. Enter notes for the following:
   - Personnel
   - Travel
   - Supplies/Materials
   - Trainings/Meetings
   - Other Expenses
   - Indirect Expenses on above
   - Sub-awards
   - Indirect Expenses on Sub-awards

2. Click Save. The budget will be automatically submitted with the application.

Note: Grant budget information may be edited until the application is submitted. After submission, budget information becomes read-only. Contact Ascendium staff at grantportsupport@ascendiumeducation.org to unlock your budget to edit.

7 VIEW SUBMITTED PROPOSAL BUDGET

1. When the application is submitted, the proposal budget will appear under the Grantee Budgets → Proposal Budget section in the main menu. The list displays submitted budgets. To view the budget detail, select the relevant budget record in the list. The full budget detail will subsequently appear.

Note: Applicants are required to upload a grant budget. Refer to the How to Upload Documents section for more information on how to upload documents.
How to Revise a Budget

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

1. **REVIEW REQUESTED BUDGET REVISIONS**
   1. In the main menu, select Grantee Budgets → To Edit.
   2. The budgets will display in a list. To view the budget detail, select the relevant budget record in the list. The full budget detail will subsequently appear.
   3. In the Additional Information Requested note at the top of the budget detail, Ascendium staff may have provided comments detailing requested revisions.
   4. Click Edit in the top right corner.

2. **COMPLETE REQUESTED BUDGET REVISIONS**
   1. Within the budget detail, navigate to the Budget Information section.
   2. Complete requested edits to the budgeted amounts.
   3. Click Save.
   
   **Note:** There is no auto-save in this portal, so save your work often by clicking Save.

3. **SUBMIT BUDGET REVISIONS TO ASCENDIUM**
   After saving your budget edits, you need to submit them to Ascendium for review.
   1. When the budget edits are complete and ready to submit to Ascendium, click Submit Revised Budget.
   2. In the Note for Submit Revised Budget pop-up box, click OK to submit your application. Disregard the Note text field. Ascendium staff will not read these notes.
   3. Click OK to submit.

Your budget is now with Ascendium staff for review and will appear under Grantee Budgets → Proposal Budget.
How to Submit a Budget Report

All grants approved by Ascendium require narrative and budget reports to be submitted together on a schedule established in Ascendium's grant agreement or as modified in subsequent writing. Budget reports with actual expenditures should be submitted using the Grant Budget form on Ascendium's grant portal.

1. **LOCATE BUDGET REPORT TO SUBMIT RECORD**

   When it is time to submit a budget report, be sure to select the report that corresponds with the next upcoming report due date.
   
   1. In the main menu, select **Grantee Budgets → Actuals to Submit**.
   2. The upcoming budget reports for active grants display in a list. To view the report detail, select the relevant **report record** in the list. Full detail will subsequently appear.
   3. On the **report detail record**, click **Edit** in the top right corner.

2. **COMPLETE BUDGET REPORT RECORD**

   1. Complete all sections displayed on the **report form**.
   2. Navigate to the **Budget Information** section and complete actual amounts for each item.
   3. Click **Save**.
   
   Saving does not submit the report to Ascendium. See **Step 3** for how to submit.

   *Note:* There is no auto-save in this portal, so save your work often by clicking **Save**.

3. **SUBMIT THE BUDGET REPORT TO ASCENDIUM**

   1. When the budget report record is complete and ready to submit, click **Submit Actuals**.
   2. In the **Note for Submit Actuals** pop-up box, click **OK** to submit your application. Disregard the Note text field. Ascendium staff will not read these notes.
   3. Click **OK** to submit.

   The budget report is now with Ascendium staff for review and will appear under **Grantee Budgets → Actuals to Submit** with the **Status: Financial Reports Submitted**.

   *Note:* Payments that are contingent upon approval of a budget and narrative report are only released upon approval of both reports by Ascendium staff.