



TIER I CERTIFICATION DIRECTIONS & TIPS

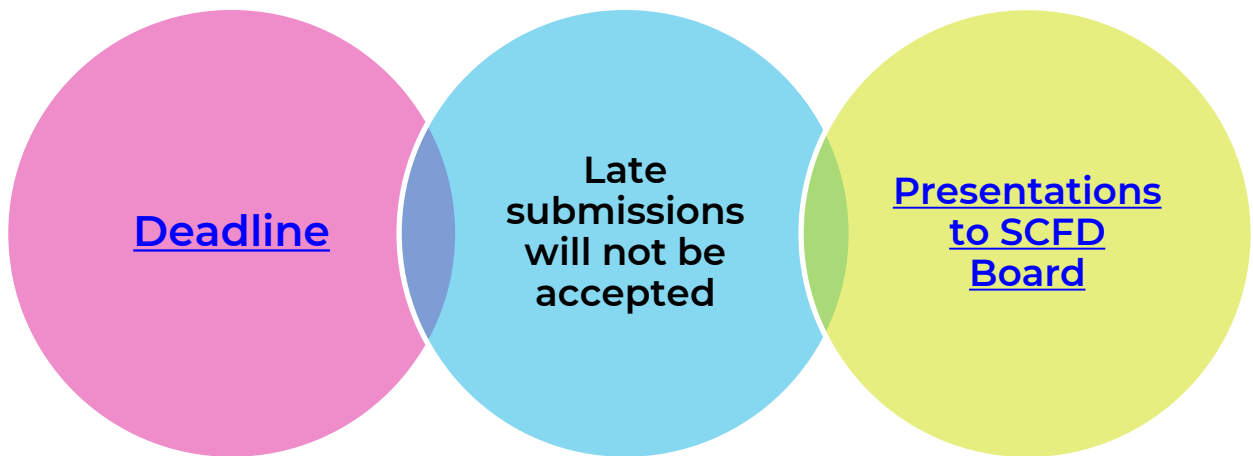


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GETTING STARTED

LOGGING IN

Organizations must use the SCFD Grants Portal in Fluxx to submit their Certification Report. If you experience an issue using the system, ensure your browser is updated to the most recent version to resolve any problem. The system supports the following browsers: Chrome, Firefox, Safari (Apple only), Microsoft Edge, and Opera.

1. Navigate to the [SCFD Tier I webpage](#) for all instructions and to access the SCFD Grants Portal in Fluxx or access the [SCFD Grants Portal](#) directly.
2. Log into your account by inputting your login credentials and clicking **Sign in**.
 - **Forgot your password?** Click **Reset or create password**. You will be prompted for your email address. If your email address is registered to an active account in Fluxx, you will receive an email to reset your password.
 - If you do not receive a password reset email from Fluxx, your email address might not be registered in our system. Contact the SCFD office for assistance.
 - **Forgot your user login email?** Contact the SCFD office. Do not create a new user account with a different email address as grants are associated with your email used when first logged into the system.

First time logging in? Contact SCFD staff to ensure you are set up with a username. Do not click **Create an account** on the login landing page.

Do you need to add/remove organization contacts? Contact SCFD staff to update.

IMPORTANT: Each person who logs in on behalf of an organization will have their own user profile. Only one user can access the report at a time.

NAVIGATING THE GRANT PORTAL

After you are logged into the Fluxx grantee portal, use the menu on the left side of the page to navigate around the grant portal.

STARTING, EDITING, AND SUBMITTING AN APPLICATION

1. Click on Organizations in the navigation menu on the left side of the page. Review to confirm all areas are complete. Click **Edit** to update any information.

If you need to update any of the following in the Organization Profile, email scfd@scfd.org.

- Organization Legal Name
- Organization Legal Doing Business As
- Tax ID
- Tax Class

Organization audit documents for SCFD eligibility are not required at this time.

2. To begin a Tier I application, start on the Welcome page. Scroll down the page and click the green **Apply for Tier I Funding** button. This will open a new application in edit mode.
 - Use the **Save** button regularly to save your progress as you complete the application. *The portal does not autosave.*
 - Use the **Save and Close** button when you are done working on the application. This will remove you from the editable version of the application.
 - The **Cancel** button will not save any changes made to the application and remove you from the editable version of the application.
3. Assign an organization contact for each category.
 - Primary Contact: primary contact to answer questions about the application and responsible for the content of the application and assurances.
 - Primary Signatory: secondary contact to answer questions about the application.
 - Finance Reviewer: permitted access to review and approve the Bank Confirmation Form for payments.
4. Once an application has been started and saved it will be located under **Requests – Drafts** on the left side navigation menu.
 - Use the **Edit** button on the top right of your application to continue editing your application.
5. After you have completed the application and clicked **Save and Close**, review the final application to ensure all sections are complete. In this screen, the system will show you total calculations and notify you if there are any requirement issues.
6. Use the **Submit** button to submit the application to SCFD. After submission, your application will appear on the left side navigation menu under **Submitted Requests**.
IMPORTANT: You cannot edit the application after you hit the submit button.

Note: Fields in the application marked with an asterisk (*) indicate they are required and must be completed to submit your application.

UPLOADING AND VIEWING DOCUMENTS

If an attachment contains multiple pages, **combine all pages into a single document** before uploading.

How to Upload a Document:

1. Click on the green + sign to the right of the required document.
2. An upload window will appear; drag-and-drop a document into the window or click the **Add files** button at the bottom left corner.
3. Click **Start Upload**. If you have multiple files, combine them into one document so there is only one upload.
4. A green checkmark icon appears under 'Status' when complete.
5. You may now close the upload window.
6. The uploaded document will move under the Certification Documents box.

How to Preview an Uploaded Document:

1. Three icons will appear to the right of the document available to preview.
2. Click on the magnifying glass icon on the left to preview the document, which will open in a preview pane. Use the blue paper/pencil icon to edit the document, and the red 'x' to

delete the document.

CERTIFICATION

NARRATIVE

Narrative text box guidance:

- All narrative questions have a **2,000-character limit**, including spaces. This equates to around half a page of text.
- Text boxes will expand as you type/paste.
- If pasting information from another document, ensure the information is accurate and complete.
- Do not type in ALL CAPS.
- Hyperlinks can be used to navigate to videos or webpages to highlight your programming.

List the **percentage (%)** of SCFD funds used by expense category during the last calendar year. The total percentage should be equal to 100% or less. If the total is less than 100% use the narrative to explain why the funds were not used and when they will be.

(E.g., Personnel 45, Marketing 15, Programming 40)

- Click on the + sign to add Expense Category rows. Try to limit it to eight lines or less.

List the **percentage (%)** of projected SCFD funds for use by expense category for the current calendar year. The total percentage must equal 100%. (E.g., Personnel 45, Marketing 15, Programming 40)

- Click on the + sign to add Expense Category rows. Try to limit it to eight lines or less.

REPORTING

Note: Totals for operating income and expenses, net surplus/deficit, capital income, net capital surplus/deficit, attendance, and percentages will auto-calculate and appear upon clicking Save and Close.

INCOME & EXPENSES

Provide income and expenses for your organization's most recently completed fiscal year. Because organizations may have different fiscal years, it is understood that the financials provided *may or may not* coincide with the funding/programming reported in the Narrative section.

IN-KIND AND CAPITAL INCOME/EXPENDITURES

Provide any in-kind income, capital income, and expenditures for your organization's most recently completed fiscal year.

TAX INFORMATION

Fill in the amount of State, Federal, and occupational privilege taxes paid. **IMPORTANT** - This includes payroll and withholding. If you have part-time or full-time paid staff, this must be filled out.

- Government organizations: Only include taxes for the department that has SCFD eligibility. **DO NOT** include taxes for the entire municipality.

STAFF AND VOLUNTEER

Provide information on staff/volunteers. Ensure that the status of all full-time, part-time, and contract employees is compliant with Federal and State labor laws.

ATTENDANCE

Report the organization's overall in-person and virtual attendance numbers for the most recently completed fiscal year. **Use actual attendance numbers, not impressions or occurrences.**

REMINDER:
Account for a person's attendance in only one category.

Virtual Attendance: Include only attendance that provides meaningful engagement and is tangible. **Only include counts that** meet the meaningful engagement requirement. I.e., social media posts, marketing statistics, website analytics, YouTube/Vimeo views, newsletter subscriptions, indirect attendance, etc.

Note: Youth includes anyone your organization classifies as a youth.

- **General Visitor** Information: account for all people attending or participating in programming, performances, or exhibits; paid or free.
- **Fundraising:** Account for all people who attended your fundraising events.
- **School Programming:** Account for all people who attended any school programming provided by the organization, paid or free.

From your Overall Attendance, provide the total number of people served online/virtually. E.g., If the organization served 3,000 people in-person and virtually (Overall Attendance) and 500 of the 3,000 was served virtually, input 500. Do not include categories mentioned above. Virtual Attendance should not be greater than the Overall Attendance.

Reminder: Overall Attendance will calculate and appear upon clicking Save and Close.

SCHOOLS

- **Number of Schools Served:** Based on all the schools your organization provided programming for, count each school once and type the total into the field. If you do not work directly with schools (public, private, or home schools), enter "0".
- **School Demographics (optional):** If you have demographic data regarding school children served (gender, race, free lunch, etc.), provide that information.

Attendance by County: Break down your total attendance by county to the best of your ability, including your virtual attendance. Fill in the chart with the number of attendees, not percentages. This is important information!

The total Overall Attendance should match the total Attendance by County.

ATTACHMENTS

The system supports the following file types: Word, Excel, and PDF. Ensure your attachment is appropriately labeled and includes your organization name and attachment title.

E.g., *Key Staff List_SCFD Training Org*

- To upload and preview a document, follow the instructions under Navigating the Portal section above. After the documents have been uploaded, the document will move to the Certification Documents box.

- The School List attachment **must be** uploaded as an Excel spreadsheet.

Required Attachments:

1. Most recent Annual Report (Optional) or Board/City Council List if the Annual Report is not applicable/available
2. Current Fiscal Year Budget
3. Key Staff List
4. School List (*in Excel format*) - include, at minimum, the full name and county of each school served
5. Stories of interest, photos of programs, activities, or exhibits (limit to no more than three stories).

ASSURANCES

All applicants must complete the Assurances section. The authorizing official is responsible for the content in each assurance statement.

REVIEW & SUBMIT

To review the final application and report, click **Save and Close**. Carefully proofread the content, ensure all required information is complete, all attachments have been uploaded, and all assurances have been answered. Click the **Submit** button.

WARNING: You will not be able to edit the report after submission.

Reminder: Your submitted report can be found under the Submitted Reports folder.

Late/incomplete applications will not be accepted. There will be no exceptions. SCFD encourages organizations to submit early.

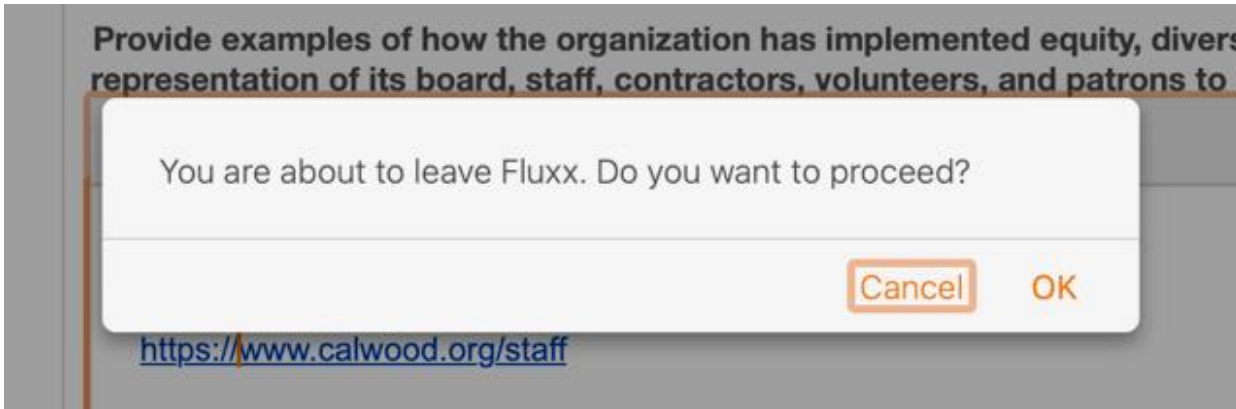
QUESTIONS

SCFD Staff is available to help! Contact the [SCFD staff](#) if you have any questions or concerns regarding SCFD reporting or application procedures.

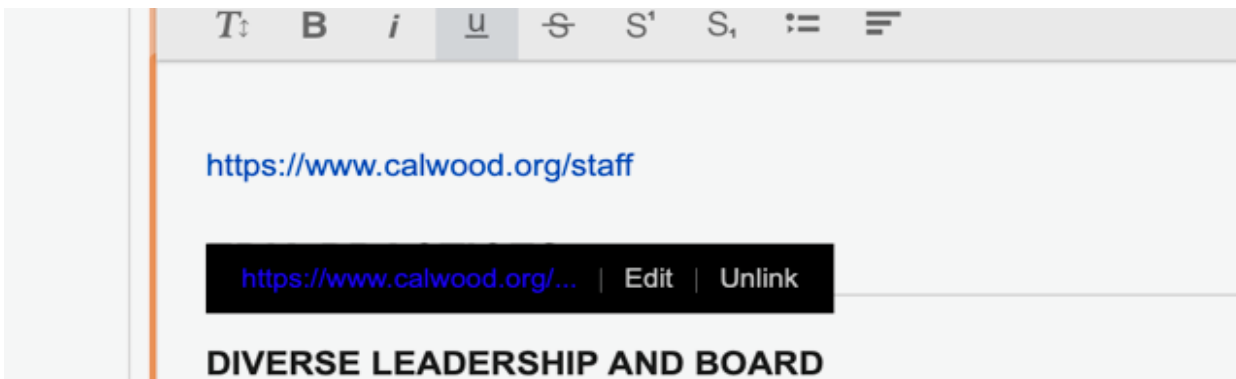
ADDENDUM A: INSERTING HYPERLINKS

To insert hyperlinks for documents, web pages, or videos, follow the instructions below.

1. After pasting the full URL into Fluxx, click on the URL. The following message appears: **“You are about to leave Fluxx. Do you want to proceed?”** Select **“Cancel.”**



Then there is an option to *Edit | Unlink*. Select **“Edit.”**



Then type in the *Text* field a shortened name for the URL, see below.

