PORTAL OVERVIEW
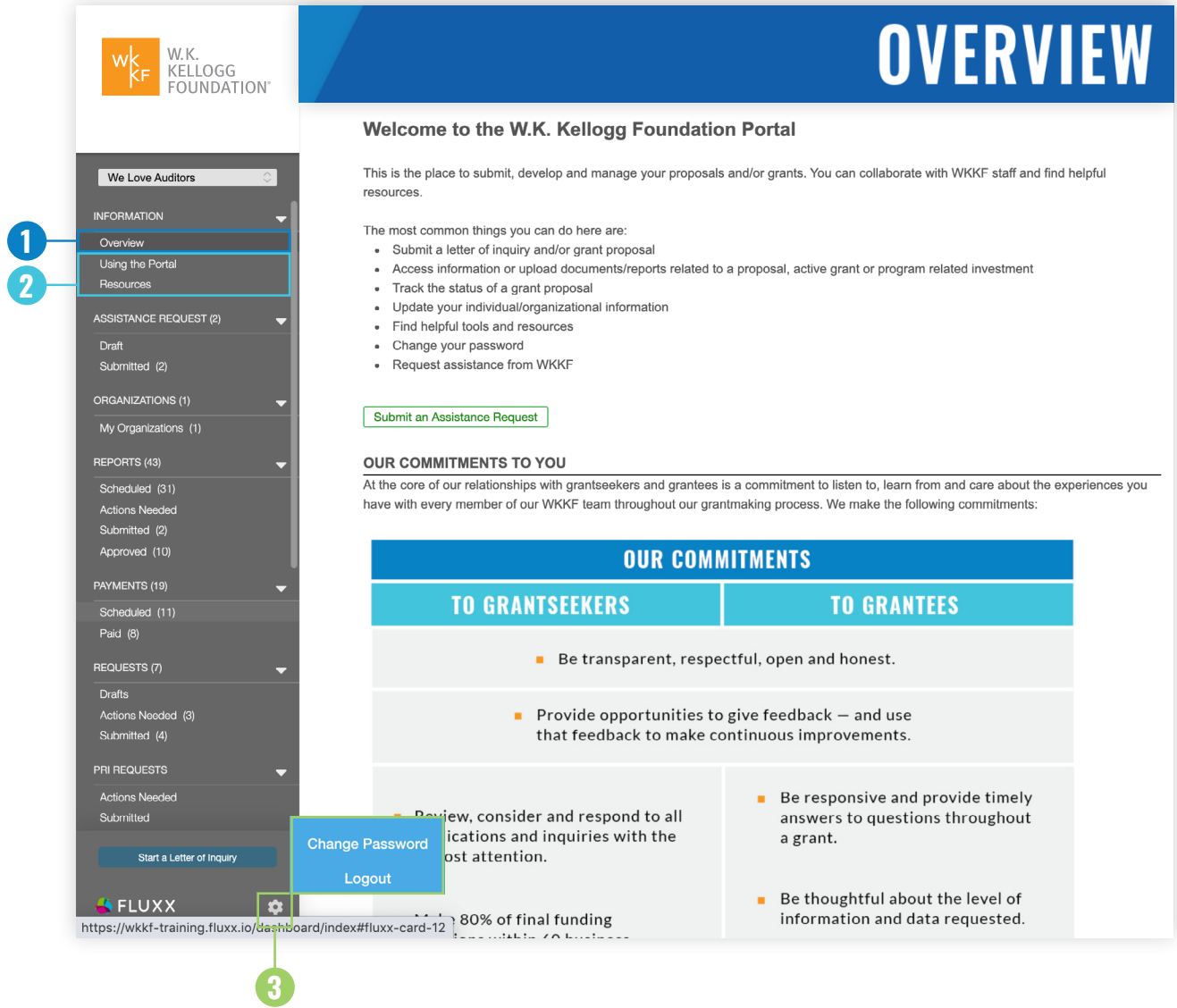
GRANTEE
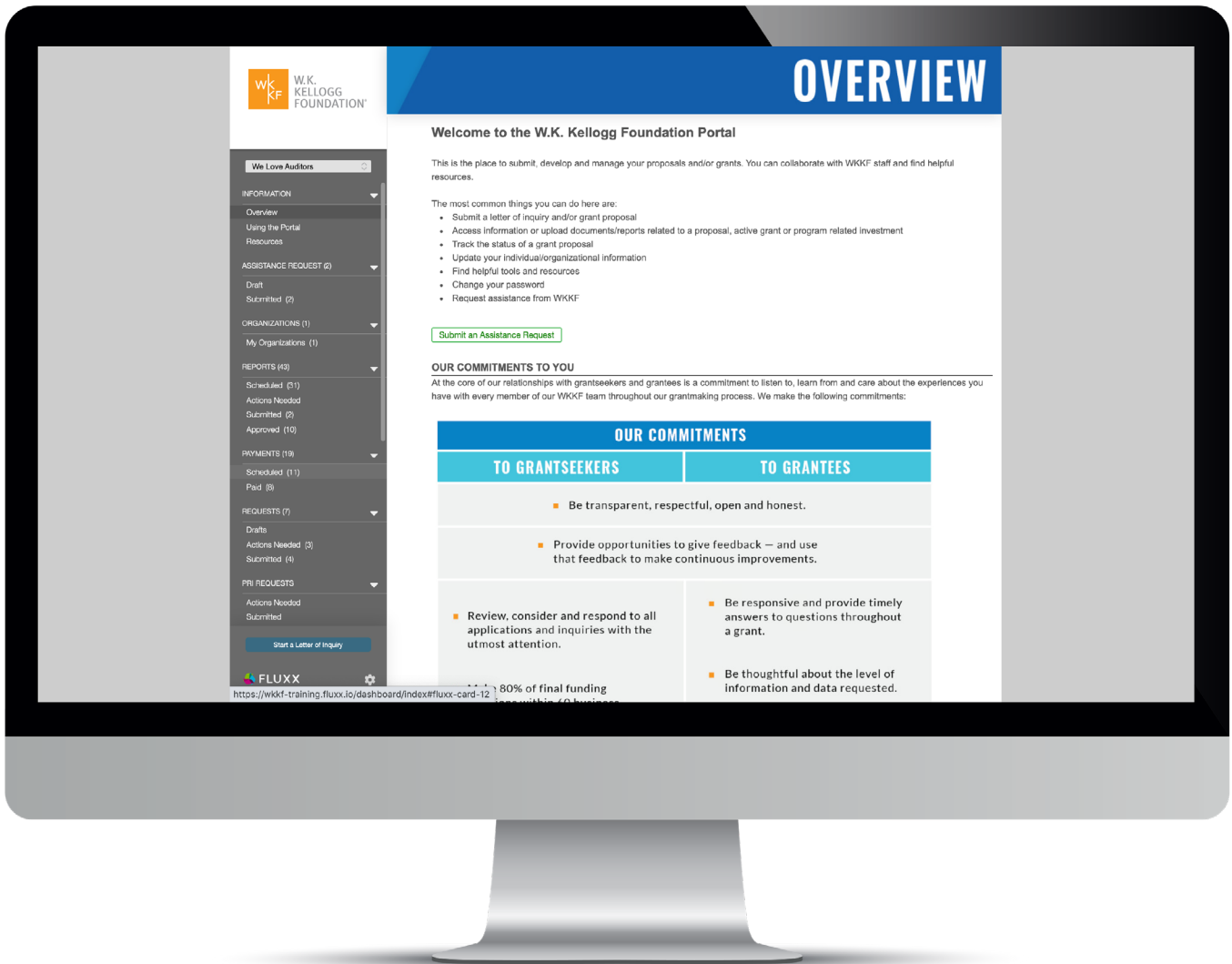
Welcome screen for Grantee Portal

1. Grantee Portal Overview Page

This page includes general instructions for how to use the portal.

3. Other Actions (Gear Icon)

Go here to:
- **Change Password**
- **Logout**

2. Using the Portal & Resources

These pages include information, resources and instructions on using the portal and managing your grant from beginning to end, including:

- **Applying for a Grant**
- **Submitting Reports**
- **Updating Contact Info**
- **Understanding WKKF Priorities & DNA**
- **Advocacy & Lobbying Info**
- **New Grantee Orientations**
- **Announcing a Grant**
- **Evaluation, Annual & Final Narrative Reports**
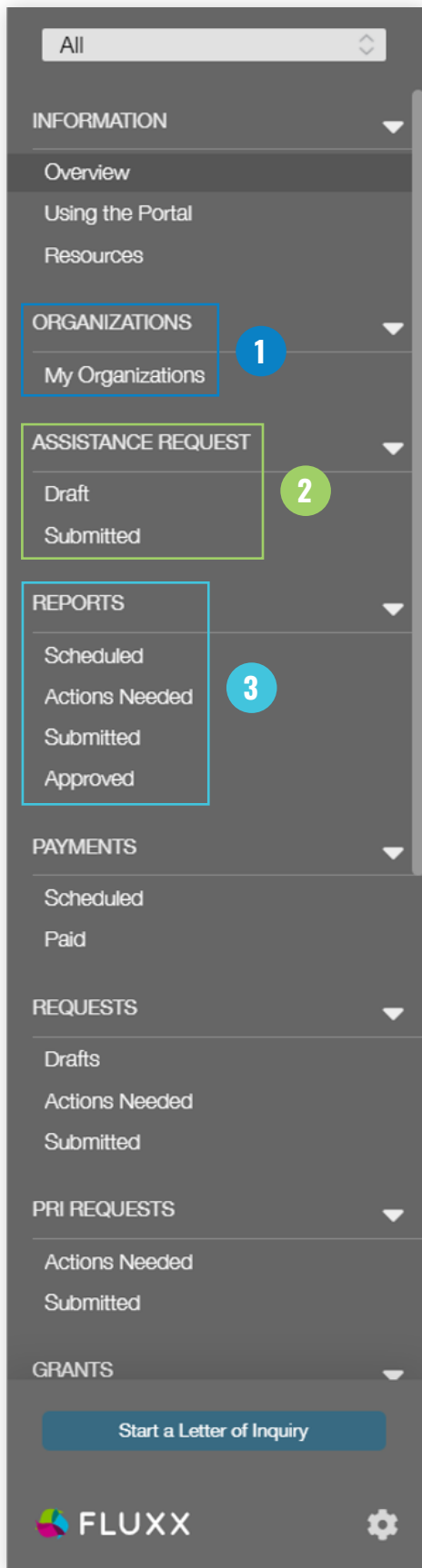
1. Organizations

View or submit a request to edit your organization's contact information or payment details. WKKF may also periodically request updates to banking information here.

2. Assistance Request

Assistance Request forms appear here. This form is used for questions, assistance with a portal account or creating a different account for a colleague. It can be submitted from the **Overview** page, linked at the top of the left-hand menu bar.

Draft: View an Assistance Request form that has been drafted, but not yet submitted.

Submitted: View an Assistance Request form submitted for WKKF's review.

3. Reports

**Upload required reports. Access New Grantee Orientation modules here.**

Note: Some grant payments may be contingent on the submission of reports. See our **Resources** tab to learn more about reporting requirements and cycles.

Scheduled: View upcoming due dates for reports, prepare and submit reports.

Actions Needed: View and edit a submitted report for which the Foundation requires further information.
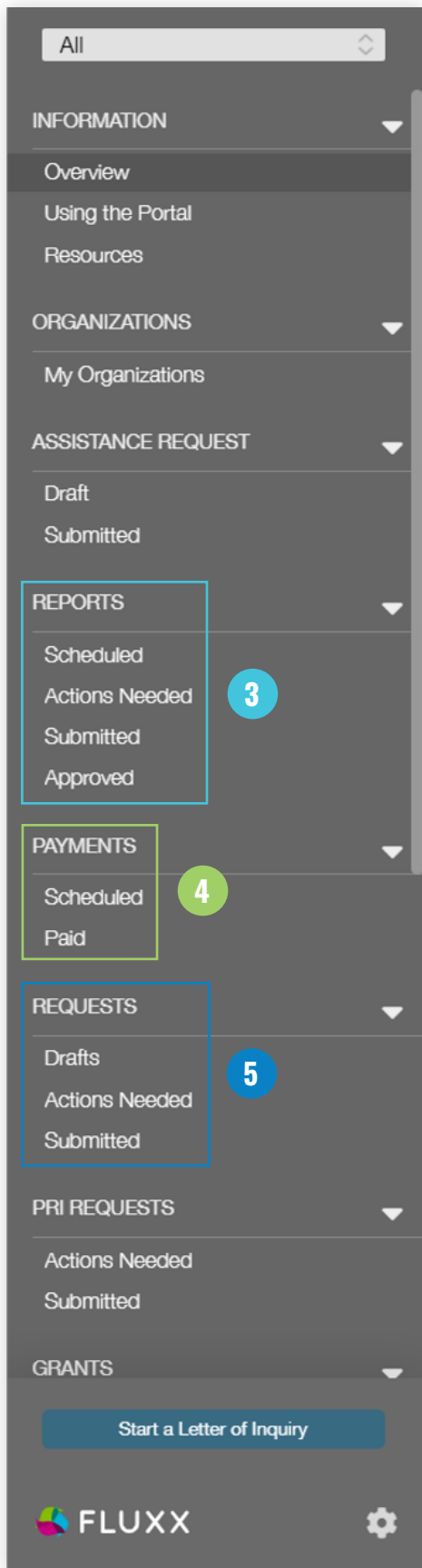
3. Reports (continued)

Submitted: View submitted reports currently under review by the Foundation.

Approved: View submitted reports approved by the Foundation. Please note that records for any payments scheduled in connection with approved reports will appear under **Payments: Scheduled**.

4. Payments

Records for grant-related payments appear here.

Scheduled: View all dates and amounts for upcoming grant payments.

Paid: View previous payments made on a grant.
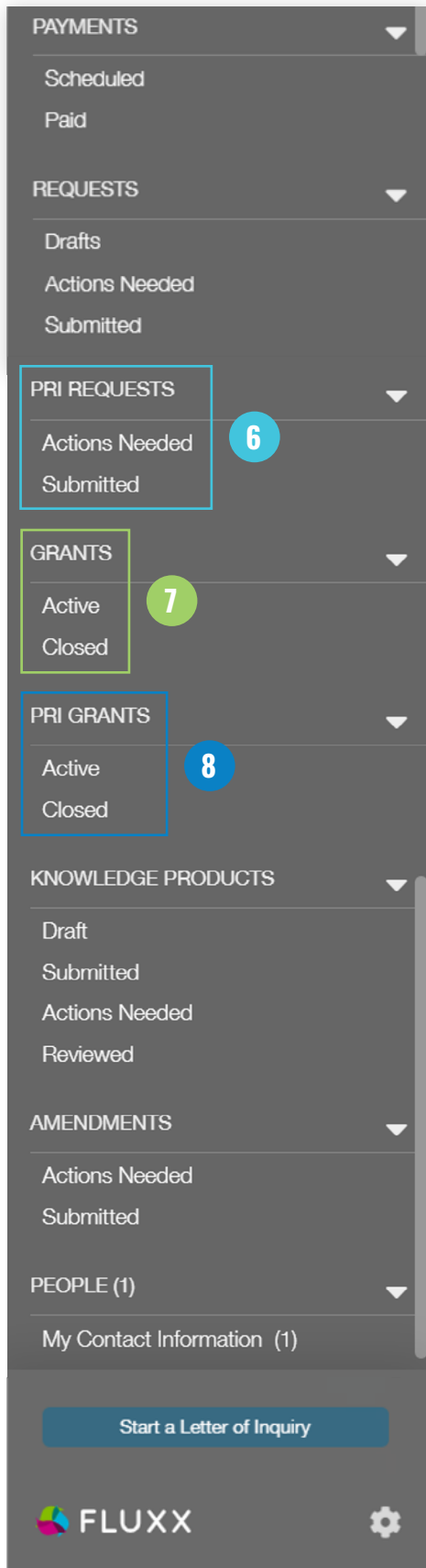
5. Requests

Records for grant requests appear here.

Drafts: View a grant request that has been drafted, but not yet submitted.

Actions Needed: View and edit a request for which the Foundation requires further information.

Submitted: View a submitted request currently under review by the Foundation.

Sidebar menu (image)

PAYMENTS ▼
Scheduled
Paid

REQUESTS ▼
Drafts
Actions Needed
Submitted

PRI REQUESTS ▼
Actions Needed — **6**
Submitted

GRANTS ▼
Active — **7**
Closed

PRI GRANTS ▼
Active — **8**
Closed

KNOWLEDGE PRODUCTS ▼
Draft
Submitted
Actions Needed
Reviewed

AMENDMENTS ▼
Actions Needed
Submitted

PEOPLE (1) ▼
My Contact Information (1)

Start a Letter of Inquiry

FLUXX ⚙

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6. PRI Requests

Records for Program Related Investment requests appear here.

Drafts: View a request that has been drafted, but not yet submitted.

Actions Needed: View and edit a request for which the foundation requires further information.

Submitted: View a submitted request currently under review by the foundation.

7. Grants

Records for approved grants appear here, including the original proposal, current budget, grant-related documents, grant contracts, matching fund requirements (when applicable) and other conditions.

Active: View approved grants currently underway.

Closed: View closed grants.
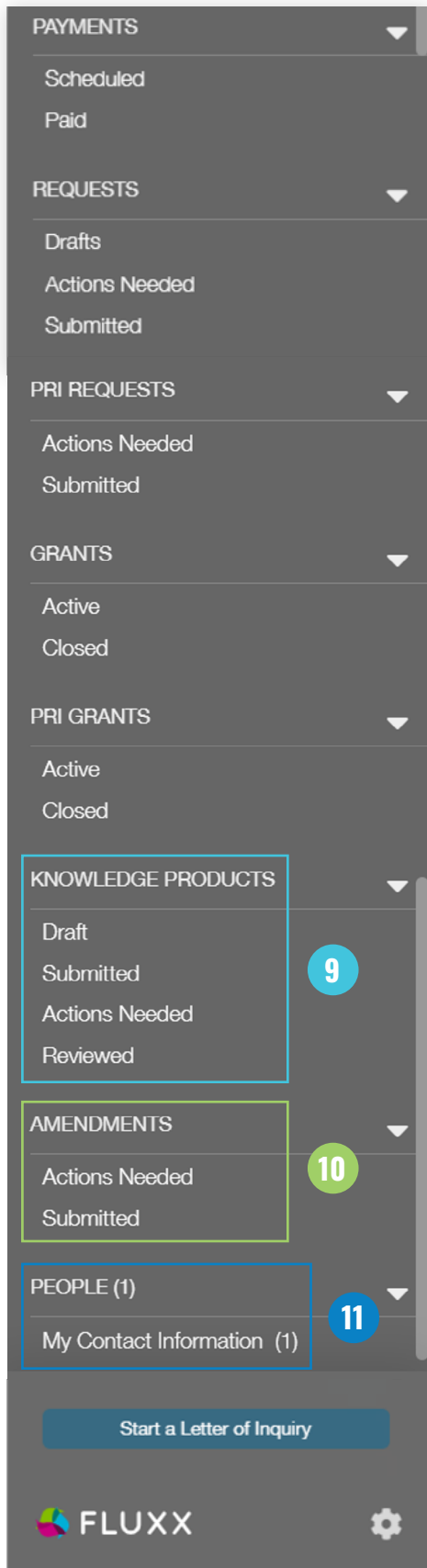
8. PRI Grants

Records for approved Program Related Investment grants appear here, including PRI-related documents and contacts.

Active: View approved PRI grants currently underway.

Closed: View closed PRI grants.

PAYMENTS
Scheduled
Paid

REQUESTS
Drafts
Actions Needed
Submitted

PRI REQUESTS
Actions Needed
Submitted

GRANTS
Active
Closed

PRI GRANTS
Active
Closed

KNOWLEDGE PRODUCTS
Draft
Submitted
Actions Needed
Reviewed

AMENDMENTS
Actions Needed
Submitted

PEOPLE (1)
My Contact Information (1)

Start a Letter of Inquiry

FLUXX

9. Knowledge Products

Records for Knowledge Products (KPs) created as part of a grant appear here. KPs are typically submitted along with annual or final narrative reporting but can be uploaded at any time. For more information about KPs, see **Using the Portal** and **Resources**.

Draft: KPs uploaded but not yet submitted to the foundation.

Submitted: KPs submitted to the foundation but not yet reviewed.

Actions Needed: View and edit a submitted KP for which the foundation requests further information.

Reviewed: View knowledge products received and reviewed by the foundation.

10. Grant Amendments

Records for grant modifications appear here. Amendment requests are initiated by, and in consultation with, foundation program staff.

Actions Needed: Complete information requested by the Foundation to amend an active grant.

Submitted: View a submitted amendment request currently under review by the Foundation

11. People

View or edit your contact information here.