How to Apply Online

Our application process is completely online and managed through our granting portal - Fluxx. Through Fluxx, you can view your applications in progress, grants approved and payments made, and can complete the post grant accountability.

We recommend using Google Chrome to access Fluxx. Fluxx is optimised for use on a PC or Mac. While it is possible to access Fluxx on a tablet or smartphone, some of the formatting might not be as intuitive as on desktop.

If you have difficulties using Fluxx or have questions about our granting process, please contact us. We are always happy to help.

Contact details

Phone: 03 445 9958 | Email: info@clt.net.nz | Freephone: 0800 00 11 37

190 Waenga Drive
PO Box 138
Cromwell, 9342

www.clt.net.nz

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Stage One - Organisation registration and user login

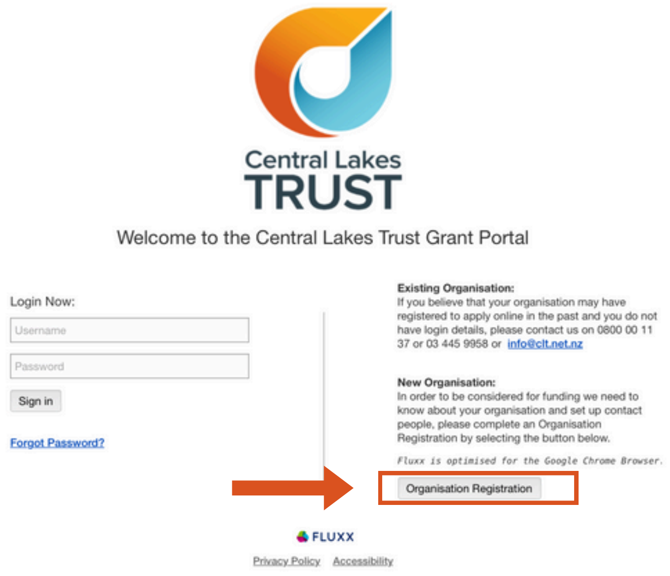
To access Fluxx, go to centrallakestrust.fluxx.io, or click on **Apply now/Login** at the top right of our website.

Before you can start an application, your organisation needs to be registered and you need a personal user login.

Most organisations in our region are already registered.

Please contact us if:
- You are unsure whether your organisation is already registered or not
- You don't have a user login.

If your organisation is not registered, click on **Organisation Registration**.

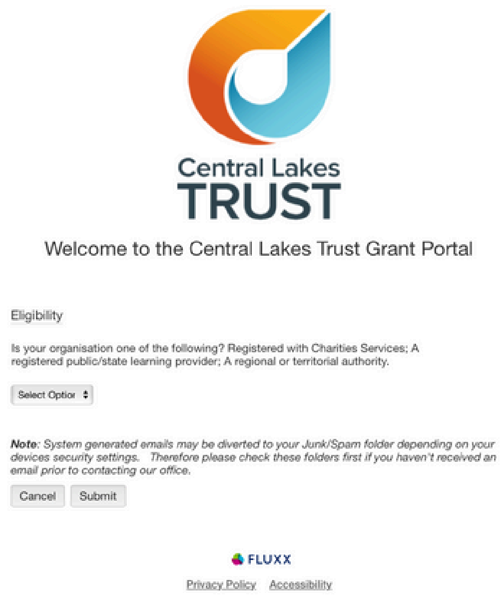


Complete the organisation eligibility quiz

Complete the quiz to confirm that your organisation meets one of our three eligibility criteria:

1. The relief of poverty
2. The advancement of education
3. Other purposes beneficial to the community.

CLT can only grant to **registered charities** within our region. If your organisation is not eligible, please visit our website to learn more of the other other organisations that may be able to help you: Other Funders

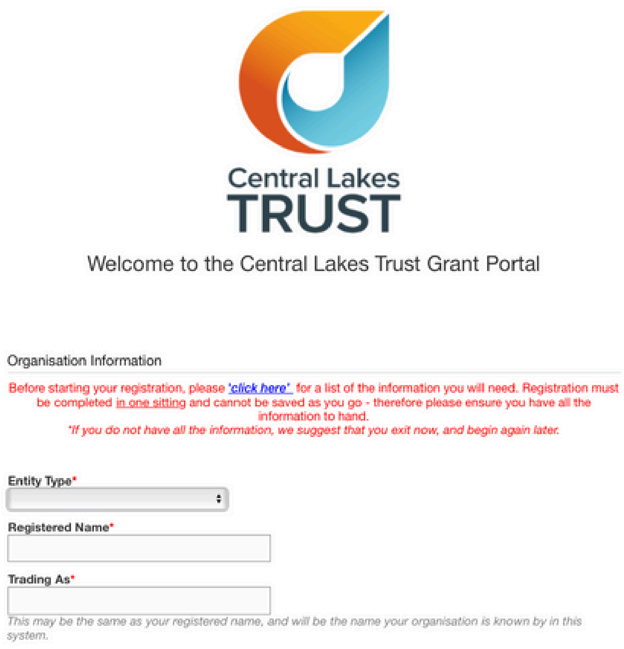


Complete the organisation registration form

The registration form needs to be completed in one session - you won't be able to save your progress to be completed later.

Please make sure you have all the [required documents] you need on hand before starting.

Once you have submitted your form you will receive an email acknowledging that we have received it.


Central Lakes TRUST

Welcome to the Central Lakes Trust Grant Portal

Organisation Information

Before starting your registration, please 'click here' for a list of the information you will need. Registration must be completed in one sitting and cannot be saved as you go - therefore please ensure you have all the information to hand.

*If you do not have all the information, we suggest that you exit now, and begin again later.

Entity Type*

Registered Name*

Trading As*

This may be the same as your registered name, and will be the name your organisation is known by in this system.

Set your password

Once your registration is approved, you will receive an email with a username and a 'Set your password' link. You will be able to access the Grantee Portal and activate your account once your password has been reset.

Please allow up to three working days to receive your registration notification us.

PLEASE NOTE:
Your username and password is unique to you as an individual. If you need to add or replace a user for your organisation, please contact us.

You can change your own contact information (e.g. phone number or email address) in Fluxx under **PEOPLE** in the left-hand panel.

Handy tip!

Your username format is firstname_lastname

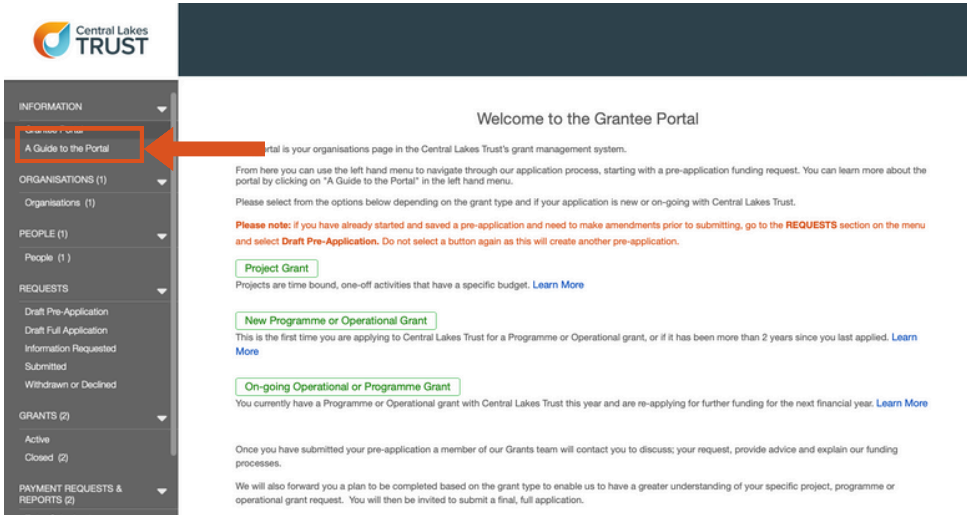
Once you have received your username and password link and activated your account you can login at https://centrallakestrust.fluxx.io or via the **Apply Now/ Login** button on our website.

Stage Two - Start your full application

Our Grantee Portal - Fluxx

Once logged in you will land directly on our Grantee Portal page in Fluxx. Here you can create and submit applications and manage your grants.

If you are not familiar with Fluxx, it is a good idea to read **A Guide to the Portal** located under **INFORMATION** in the left-hand panel to familiarise before you begin using the system.



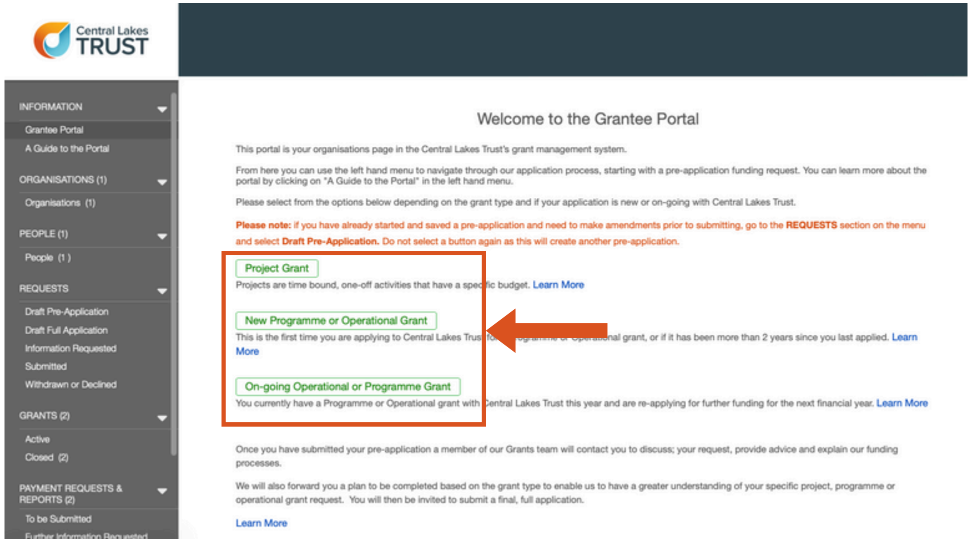
Beginning your application

To begin your application, please read the help text and consider carefully if your application will be a:

- Project Grant
- New Operational or Programme Grant, or
- an Ongoing Operational or Programme Grant

then select the appropriate **green button**.

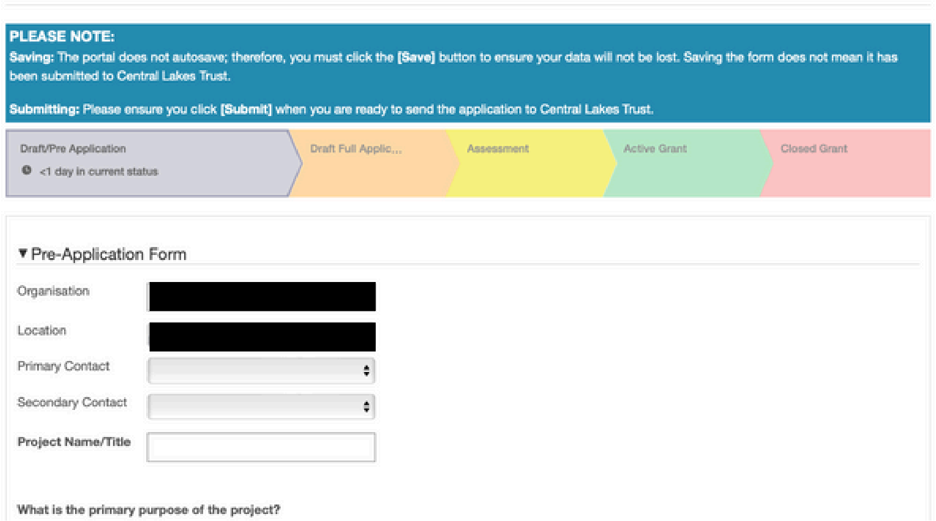
If unsure, please contact us.



Pre-application form

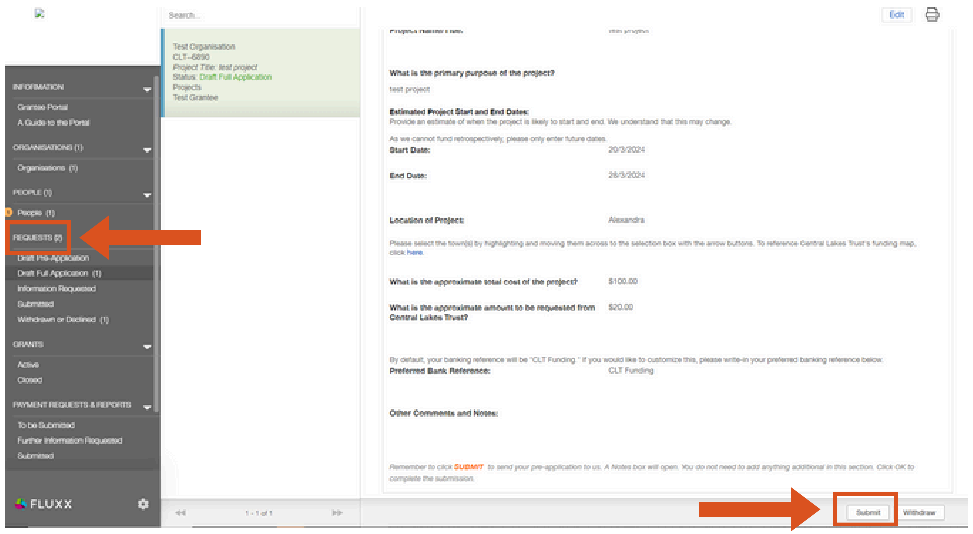
The questions in this short pre-application form provide us with an expression of interest regarding your project or service.

You can save the form and return later to finalise it later.



To return to an existing pre-application, go to **REQUESTS > Draft Pre-Application** in the left panel.

Once you are ready to send your pre-application, select **Submit**. Our grants team will then contact you to discuss the application in more depth, and provide you with the relevant project plan. We can also provide feedback and support to assist in preparing the full application.



Submitting your full application

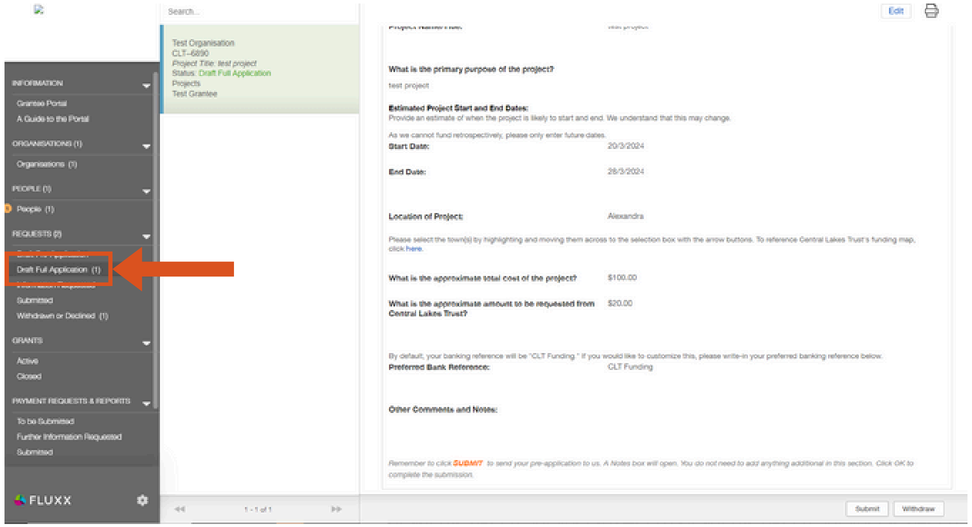
When your pre-application process is complete and has been accepted, the grants team will invite you via email to submit your full application.

To submit your full application, log in to FLUXX and select **REQUESTS > Draft Full Application** on the left panel. While completing your full application, you can save and return later as many times as you wish.

Please call us at any time if you have any questions.

Once you are ready to send it please select **Submit**.

You will receive an email acknowledging receipt of your application.

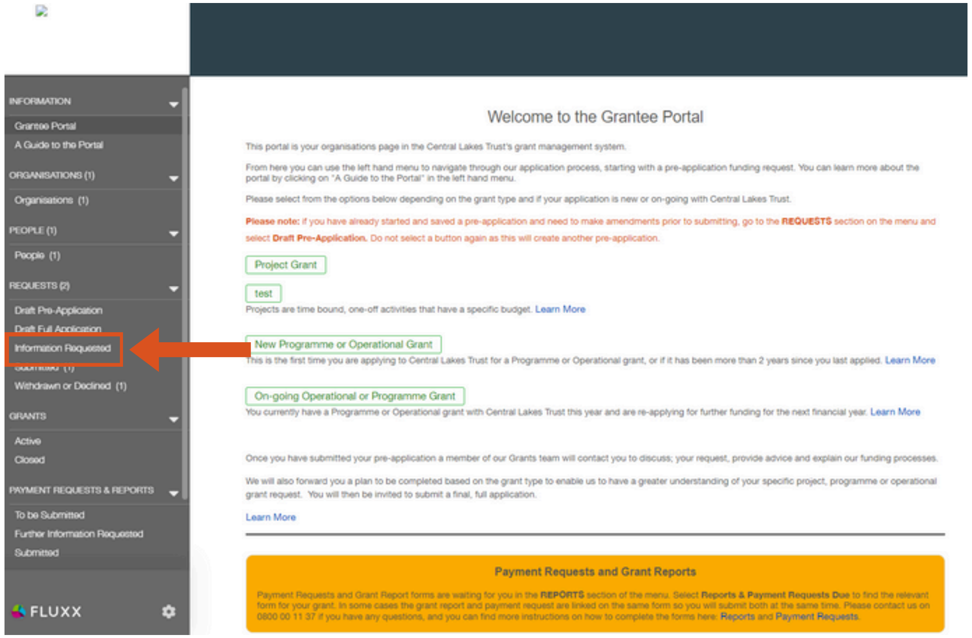


Providing more information

If we have any queries regarding your pre- or full application, our grants team will give you a call and send you an email asking you to log in and make the requested additions and/or amendments. This request may include supplying extra documentation, revising any information or clarifying any questions.

To revise or supply new information, select **REQUESTS > Information Requested** on the left panel.

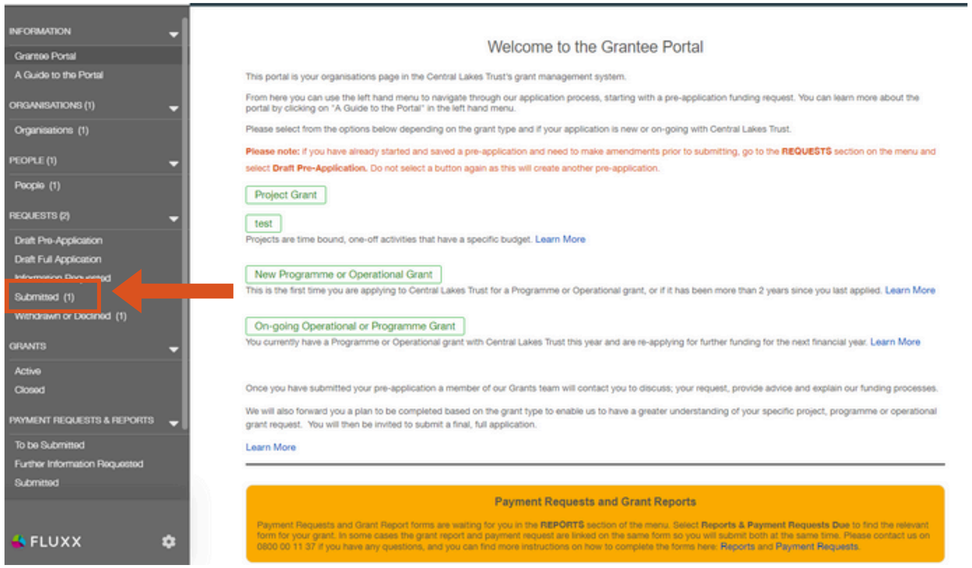
You will need to **re-submit** your application when completed to confirm any changes made.



Viewing submitted applications

To view your submitted applications, select **REQUESTS > Submitted** in the left panel. Once submitted, they are only available as read-only versions.

To find out more about what happens after an application has been submitted please read the **[FAQ's]** on our website.

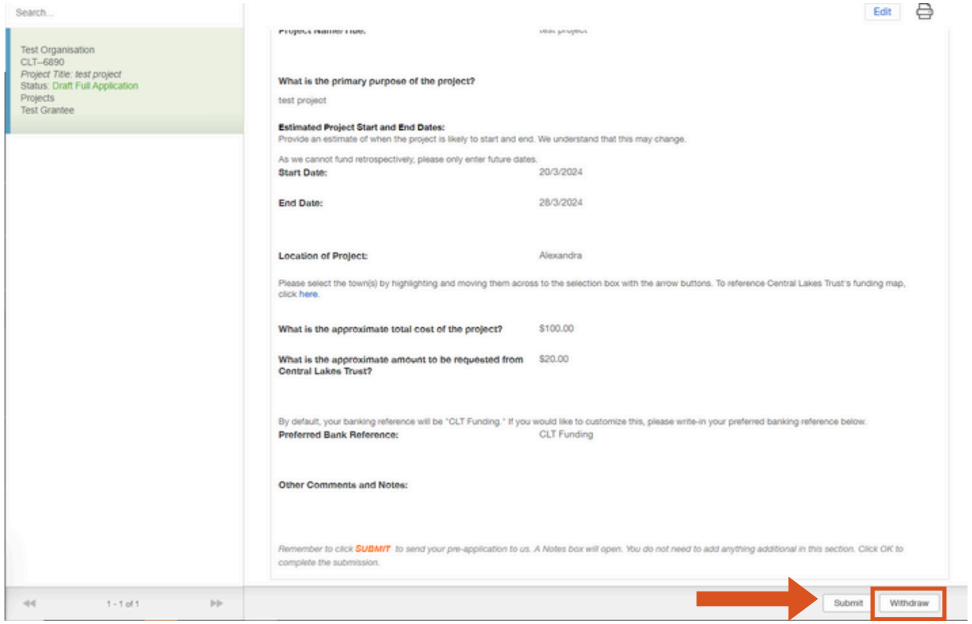


Withdrawn and declined applications

If you decide to withdraw an application, you can do so while it is in draft (i.e. not submitted) by selecting the **Withdraw** button on the bottom right of your screen. You will receive an email confirming your application withdrawal.

If the application has been declined by CLT, we will contact you to discuss our decision before sending an email notification.

To view withdrawn and declined applications, select **REQUESTS > Withdrawn or Declined** in the left-hand panel.



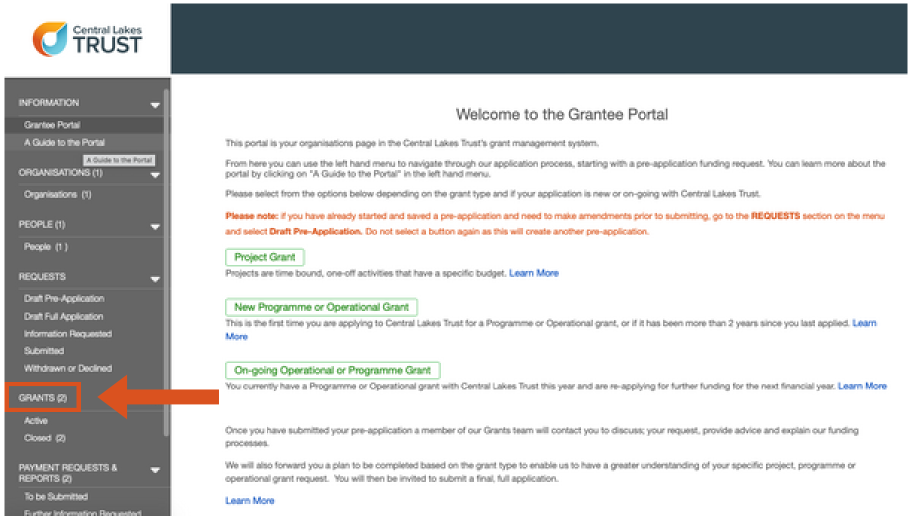
Stage Three: Managing your grant

Viewing active and closed grants

Once we have made our decision on your application, you will be advised by phone and email from the grants team.

You will find the details of the decision in **GRANTS > Active** in the left panel, where a PDF copy of the decision letter will be available in the grant documents section. This letter highlights your grant conditions as well as the payment and reporting process.

Similarly, all your organisation's previous grants that have been fully paid and all requirements have been met are available as read-only versions in the **Closed** section.



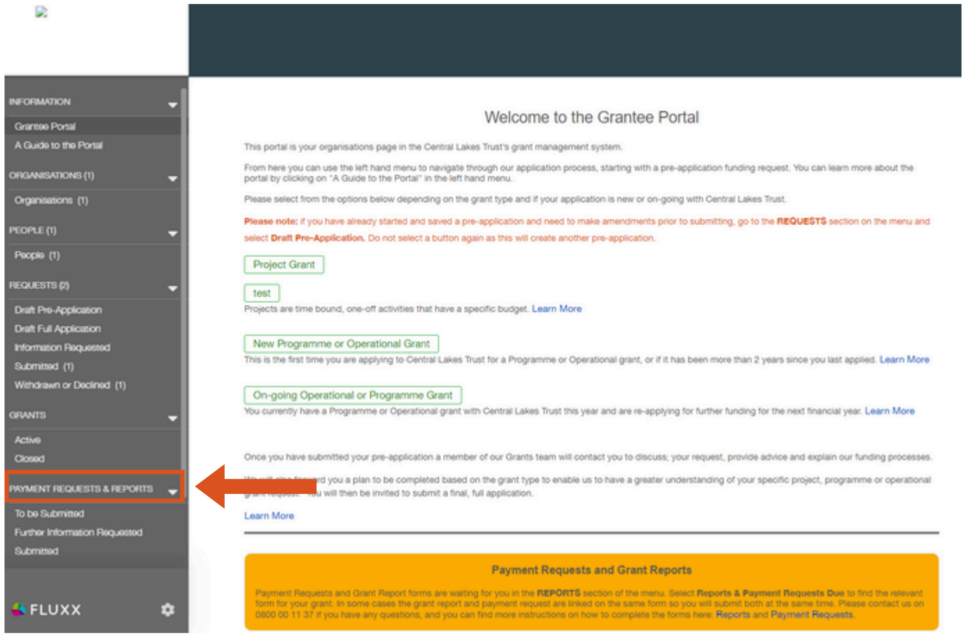
Submitting reports

You will be asked to complete reports as required by our Grant Terms and Conditions. You will receive an email notification when reports are due.

To submit a report select **REPORTS > Reports & Payment Requests Due** in the left-hand panel. There you will find cards linking to all the report and payment request forms associated with your grant.

Each report and payment request has a due date which is noted on the card as well as the form itself. We recommend calendaring these dates.

You can view your submitted reports by selecting **REPORTS > Submitted** in the left-hand panel.



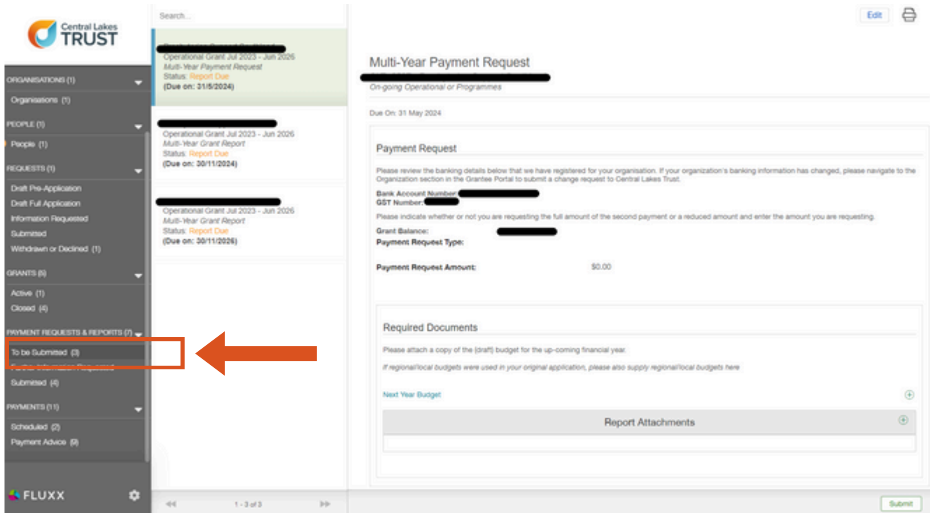
Submitting a payment request

To uplift your approved grant, you will need to submit a payment request in line with our Grant Terms and Conditions.

Project Grants
A Payment Request form will be scheduled for you to complete when you are ready. Only one payment request can be processed at a time. Once one payment has been made to you, you will revise an email alert advising you to submit your next payment request when you are ready.

Operational or Programme Grants
Our grants team will advise you on your organisation's specific requirements in line with the Grant Decision Letter.

To make a payment request, or to submit a report, select **REPORTS > Reports & Payment Requests Due** in the left-hand panel. There you will find cards linking to all the report and payment request forms associated with your grant.



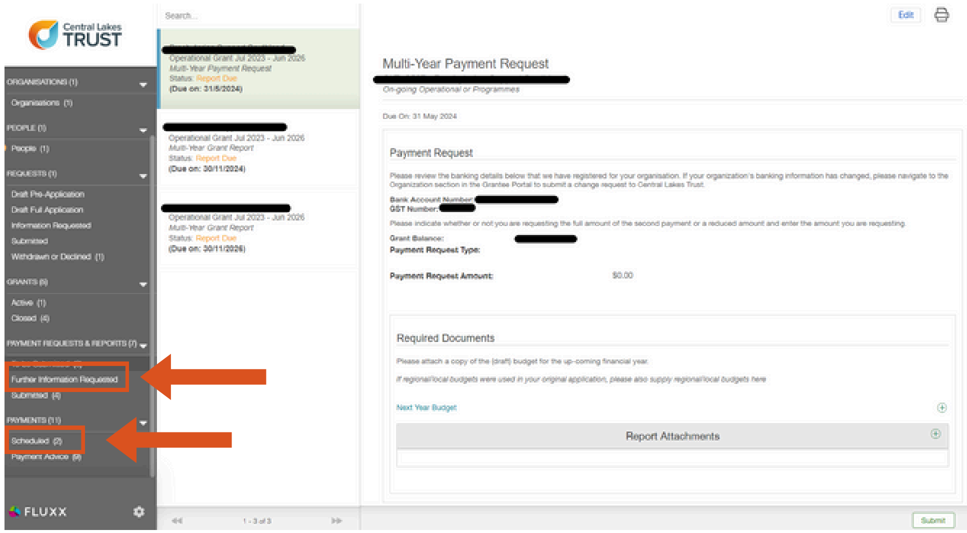
Each report and payment request has a due date which is noted on the card as well as the form itself. We recommend calendaring these dates.

Please ensure that you select the form with the appropriate date as there may be several.

Complete the questions and upload documents as required. Once you have submitted the **Payment Request** or **Report**, it will be available to view in the **Submitted** section.

Payment requests scheduled to be paid

Scheduled payment requests are located under **PAYMENTS > Scheduled** in the left-hand panel until they are paid.



Providing additional information

If we have any queries regarding your reports or payment requests, our grants team will give you a call to discuss any required amendments. You will also receive an email alert to log in and make the requested amendments. This request may include supplying extra documentation, revising any information or clarifying any questions.

Select **REPORTS > Information Requested** in the left hand panel.

You will need to **re-submit** your report when completed.

Payments Completed

When a payment has been made, you will be able to view this record by selecting **PAYMENTS > Payments Advice** in the left-hand menu.