

Step-by-Step User Guide for (Fluxx) Endeavor Health Community Investment Fund (CIF) Application & Partner Site

Applicable for: Capacity Builder & Impact Awards

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Getting Started in Fluxx

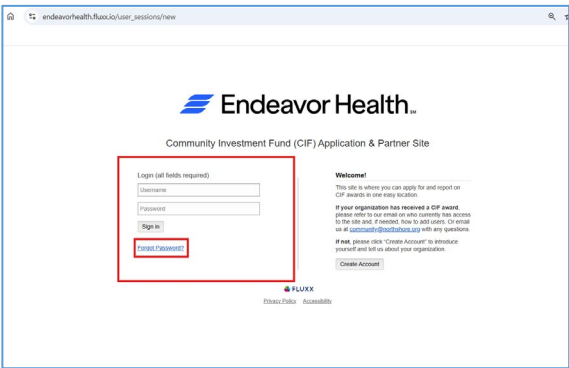
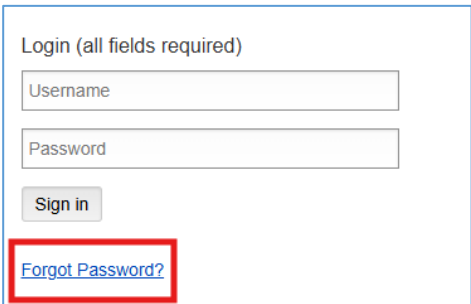
Logging in for the First Time (Current or Past CIF Awardees)

If your organization has previously received a CIF award or is a current CIF awardee, your user profile may already exist in Fluxx. Follow the steps below to access it for the first time.

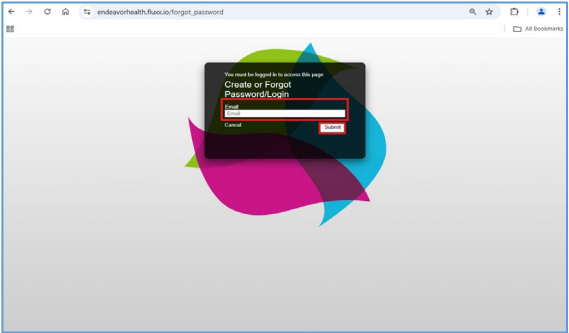
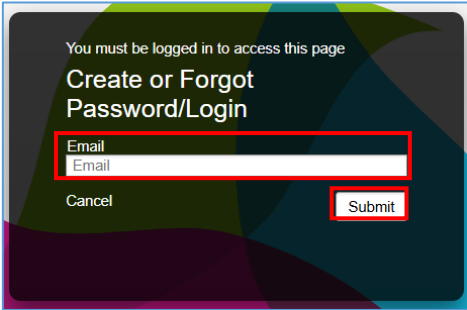
Note: After completing these steps, you can login to Fluxx as normal.

Steps:

1. Go to the [Endeavor Health Community Investment Fund \(CIF\) Application & Partner Site](#)
2. Click “Forgot Password?”

Screen location:	Highlighted area:
	

3. Enter your work email address and click “Submit”

Screen location:	Highlighted area:
	

4. Check your email for a message from “Endeavor Health Community Investment Fund” ...@fluxx.io titled “Reset Your Password”

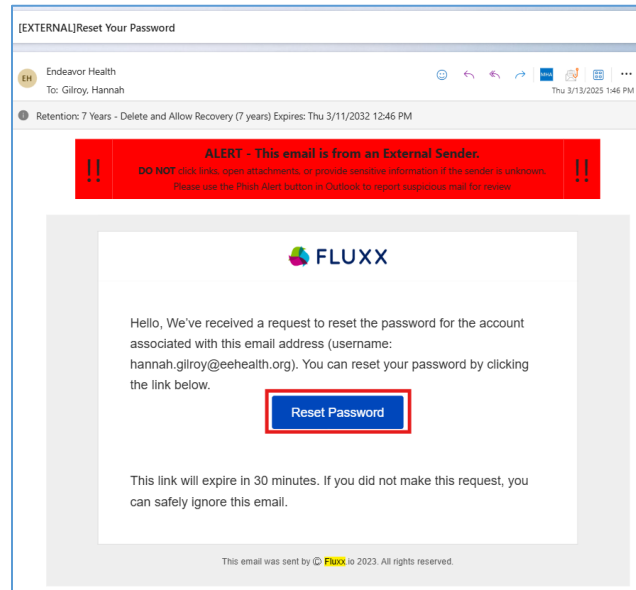
(Continued on next page)

5. From the email, click the “Reset Password” button

Check your spam/junk folder if you don't see it.

Still missing? Email us at community@northshore.org

Example email:



6. Create a new password, confirm it, and then click “Set Password and Log In”

(End)

Logging in for the First Time (All others)

To get started in Fluxx, you will need to:

1. Create an organizational profile
2. Create an individual user profile

If another member of your organization has already created an organizational profile, follow these steps to Create an Individual User.

If you are the first member of your organization, you can create both an organizational profile and individual user profile at the same time. Follow these steps to [Create an Organizational Profile](#).

(End)

Creating an Organizational Profile (New Organizations)

Before applying for funding, your organization must have a profile in Fluxx. The following steps show you how to create an organizational profile for your organization and an individual user profile for yourself.

Only one person per organization should complete these steps.


To add additional staff members from your organization, follow these steps once the organizational profile has been create: [Creating an Individual Profile](#).

Information you will need:

- Organization’s EIN or Tax ID


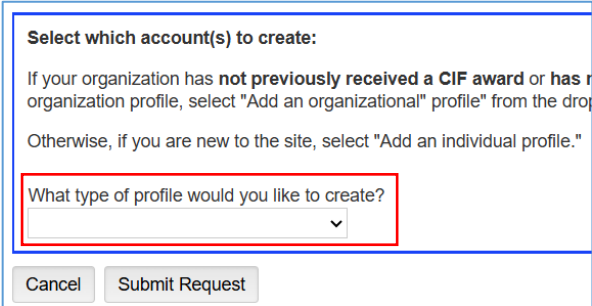
Steps:

1. Go to the [Endeavor Health CIF Application & Partner Site](#) and click “Create Account”

Screen location:	Highlighted area:
	<p>Welcome!</p> <p>This site is where you can apply for and report on CIF awards in one easy location.</p> <p>If your organization has received a CIF award, please refer to our email on who currently has access to the site and, if needed, how to add users. Or email us at community@northshore.org with any questions.</p> <p>If not, please click “Create Account” to introduce yourself and tell us about your organization.</p> <p>Create Account</p>

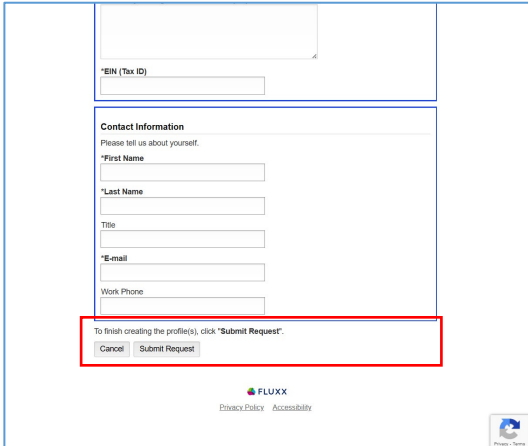
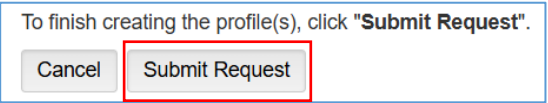
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- Under “What type of profile would you like to create?,” select “Add an organizational profile.” Additional fields will appear

Screen location:	Highlighted area:
 <p>The screenshot shows the Endeavor Health logo and the title 'Community Investment Fund (CIF) Application & Partner Site'. A red box highlights the section titled 'Select which account(s) to create:'. Below this title, there is instructional text: 'If your organization has not previously received a CIF award or has not already created an organization profile, select "Add an organizational" profile" from the drop-down. Otherwise, if you are new to the site, select "Add an individual profile."' and a dropdown menu labeled 'What type of profile would you like to create?'. At the bottom of this section are 'Cancel' and 'Submit Request' buttons.</p>	 <p>This close-up shows the text 'Select which account(s) to create:' followed by the instructional text. The dropdown menu is open, and the text 'What type of profile would you like to create?' is visible above it. The 'Submit Request' button is highlighted with a red box.</p>

- Fill in the required information in the following sections:
 - Eligibility:** If you’re not a 501(c)(3), not part of a collaboration with one, or not a school district, you must work through a 501(c)(3) as a fiscal sponsor. Email us at community@northshore.org to confirm eligibility
 - Organization Information** (EIN required)
 - Primary Contact Information**

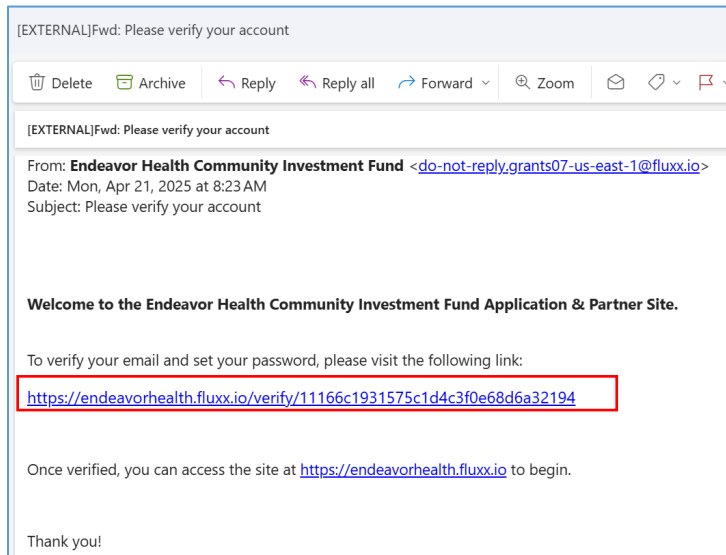
- Click “Submit Request”

Screen location:	Highlighted area:
 <p>The screenshot shows the 'EIN (Tax ID)' field and the 'Contact Information' section. The 'Contact Information' section includes fields for 'First Name', 'Last Name', 'Title', 'E-mail', and 'Work Phone'. A red box highlights the text 'To finish creating the profile(s), click "Submit Request"' and the 'Submit Request' button.</p>	 <p>This close-up shows the text 'To finish creating the profile(s), click "Submit Request"' and the 'Submit Request' button, which is highlighted with a red box.</p>

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5. Check your email for a confirmation from “Endeavor Health Community Investment Fund” ...@fluxx.io titled “Please verify your account.” Click the link to verify your email and set your password.

Example email:



(End)

Creating an Individual Profile


Once your organization has a profile, additional team members can create their own individual user profiles and connect to the organization's profile.

Information you will need:

- Your organization's EIN or Tax ID


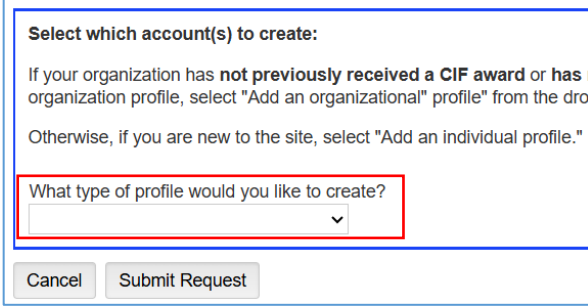
Steps:

1. From the [Endeavor Health CIF Application & Partner Site](#), click **"Create Account"**

Screen location:	Highlighted area:
	<p>Welcome!</p> <p>This site is where you can apply for and report on CIF awards in one easy location.</p> <p>If your organization has received a CIF award, please refer to our email on who currently has access to the site and, if needed, how to add users. Or email us at community@northshore.org with any questions.</p> <p>If not, please click "Create Account" to introduce yourself and tell us about your organization.</p> <p>Create Account</p>

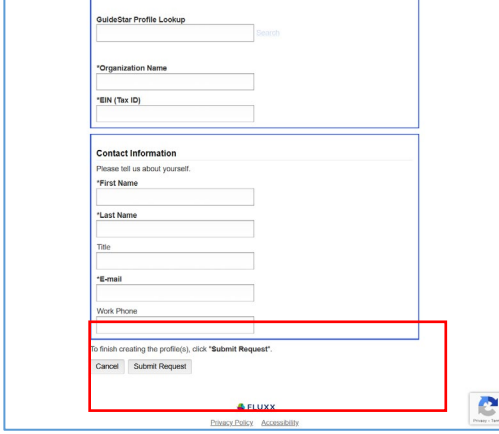
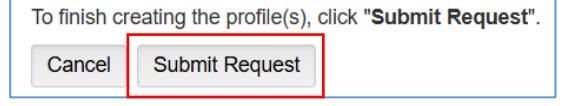
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- Under “What type of profile would you like to create?,” select “Add an individual profile.” Additional fields will appear

Screen location:	Highlighted area:
 <p>The screenshot shows the Endeavor Health logo and the text "Community Investment Fund (CIF) Application & Partner Site". A red box highlights the section titled "Select which account(s) to create:" which contains instructions on whether to select an organizational profile or an individual profile based on previous CIF award status. Below this is a dropdown menu labeled "What type of profile would you like to create?" and "Cancel" and "Submit Request" buttons.</p>	 <p>This close-up shows the text "Select which account(s) to create:" followed by instructions: "If your organization has not previously received a CIF award or has not previously created an organization profile, select 'Add an organizational' profile' from the drop-down. Otherwise, if you are new to the site, select 'Add an individual profile.'" Below this is the dropdown menu "What type of profile would you like to create?" and the "Cancel" and "Submit Request" buttons.</p>

- Complete both required sections:
 - **Organization Information**
 - **Contact Information**

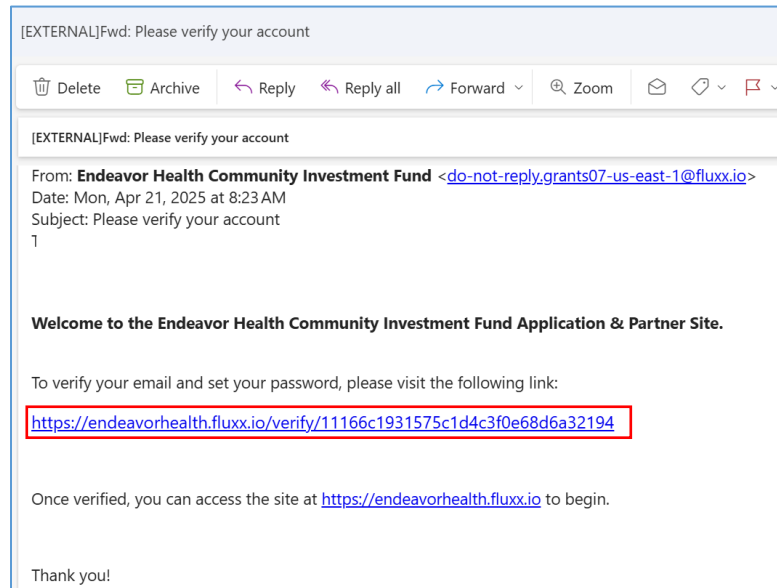
- Click “Submit Request”

Screen location:	Highlighted area:
 <p>The screenshot shows the "GuideStar Profile Lookup" search bar, followed by the "Organization Information" section with fields for "Organization Name" and "EIN (Tax ID)". Below that is the "Contact Information" section with fields for "First Name", "Last Name", "Title", "Email", and "Work Phone". A red box highlights the "Submit Request" button at the bottom of the page.</p>	 <p>This close-up shows the text "To finish creating the profile(s), click 'Submit Request'." and the "Submit Request" button, which is highlighted with a red box.</p>

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5. Check your email for a confirmation from “Endeavor Health Community Investment Fund” ...@fluxx.io titled “Please verify your account.” Click the link to verify your email and set your password

Example email:



6. Ask your organization’s moderator to connect your profile
 - The organization’s moderator is most often the person who set up your organization’s profile in Fluxx
 - Not sure who your organization’s moderator is? Email us at community@northshore.org for help

(End)

Managing Organization Access

Requesting to Connect to an Existing Organization

New individual profiles need to be connected with organizations before they are able to access applications or other organization-specific information.

Note: If you entered your organization’s name and EIN when creating your profile and your organization’s moderator approved your request, you do not need to follow the following steps.

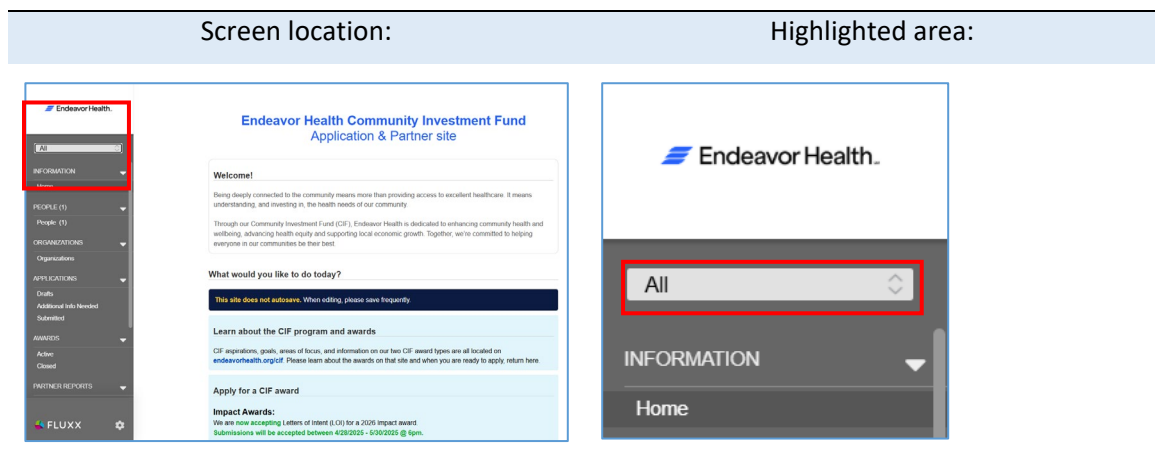
Before completing the following steps, make sure an organizational profile and individual user profile have already been set up.

What You’ll Need:

- Organization’s EIN or Tax ID

Steps:

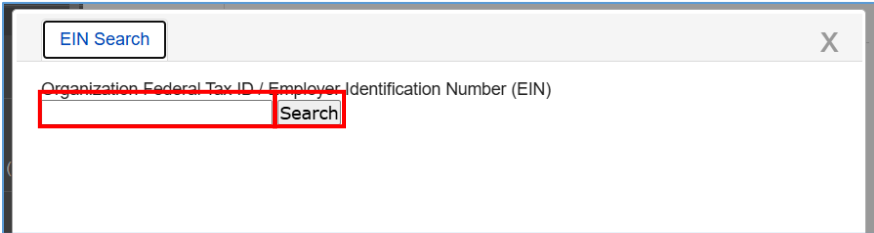
1. Log in to your account on the [Endeavor Health CIF Application & Partner Site](#)
2. From the Home page, click the dropdown under the Endeavor Health logo and select “Connect to Org”



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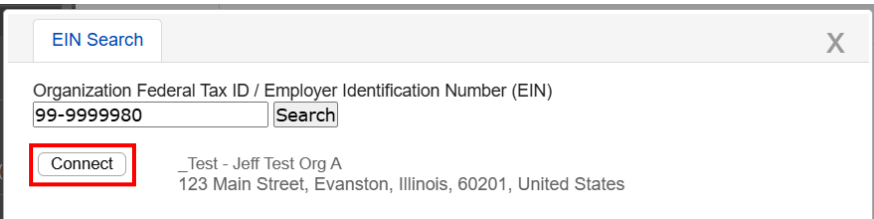
3. Enter your organization's EIN and click "Search"

Dialog:



4. Locate the organization and click "Connect"

Dialog:



5. Ask your organization's moderator to connect your profile
 - The organization's moderator is most often the person who set up your organization's profile in Fluxx
 - Not sure who your organization's moderator is? Email us at community@northshore.org for help

(End)

Adding a new user to your organization

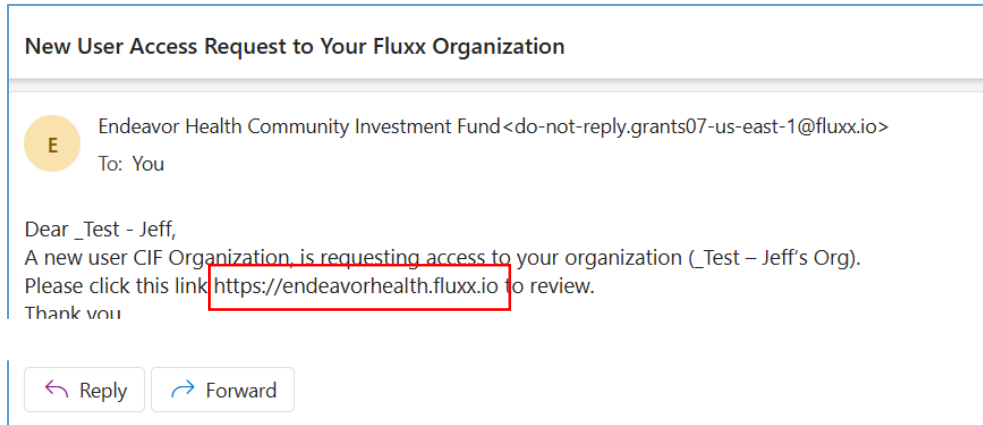
New users need to be connected with organizations before they are able to access applications, reports, and other organization-specific information. Only moderators are able to accept or deny a user’s request to be connected to an organization.

These steps are for those with moderator access.

Steps:

1. Log in to your account on the [Endeavor Health CIF Application & Partner Site](#) when you receive an email titled “New User Access Request to Your Fluxx Organization”

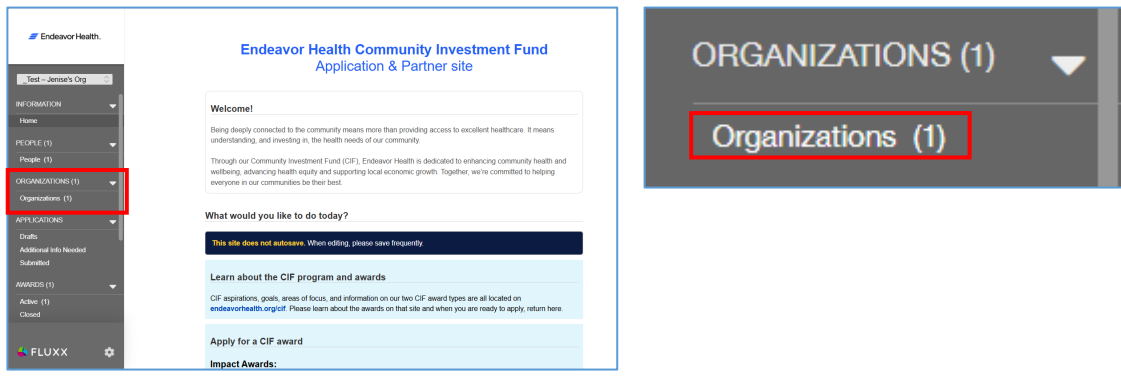
Example email:



2. From the Home page, click “Organizations” on the left navigation menu

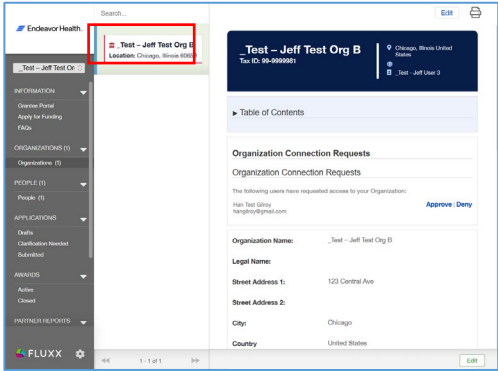
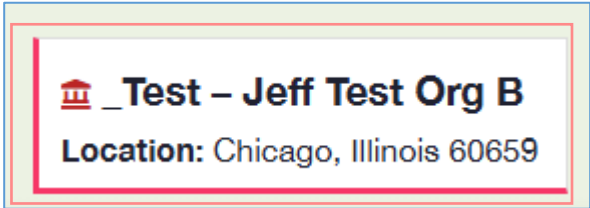
Screen location:

Highlighted area:



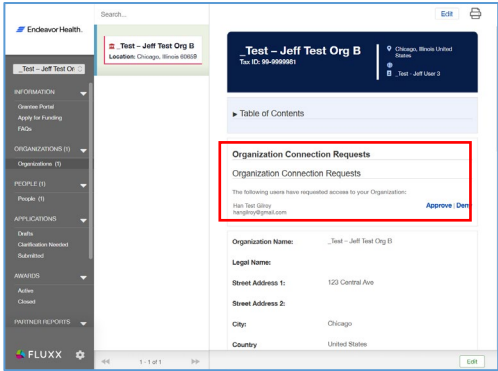
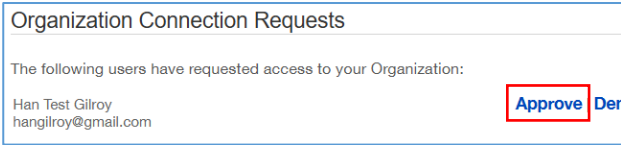
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- Click on the organization listing

Screen location:	Highlighted area:
	

- Scroll to the “Organization Connection Requests” section and click “Approve” next to the user’s name

No requests showing? Refresh the page (F5) and check again

Screen location:	Highlighted area:
	

(End)

Applying for a CIF Award

Starting and Submitting an Impact Award Letter of Intent or Capacity Builder Award Application

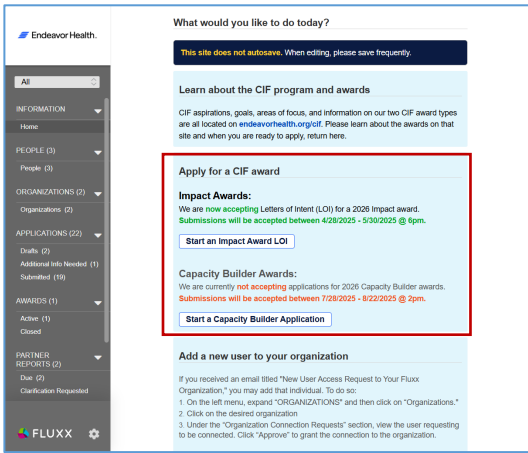

Before beginning a letter of intent (LOI) or application, make sure your organization and user profiles are created and connected.

Attention: Save frequently as this site does not autosave

Steps:

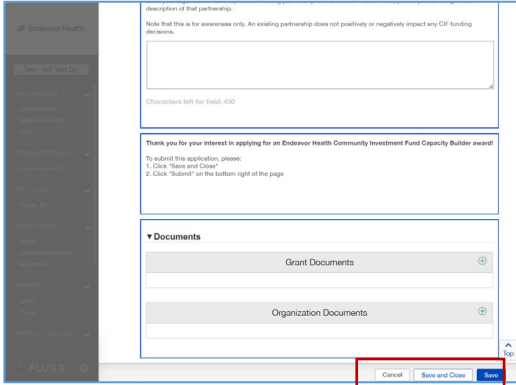

1. Log in the [Endeavor Health CIF Application & Partner Site](#)
2. Scroll to the “Apply for a CIF award” section and click on either the “Start a Capacity Builder Award Application” or “Start an Impact Award LOI” button.

Don’t see the button? Check the dates on when we are accepting proposals.

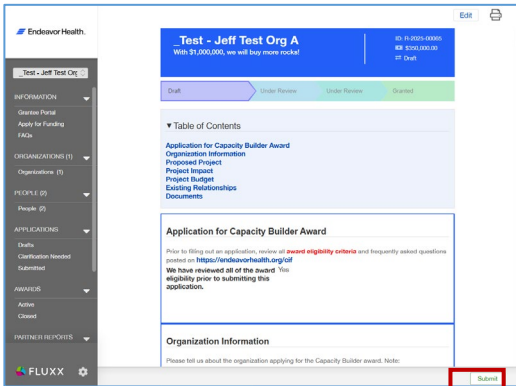
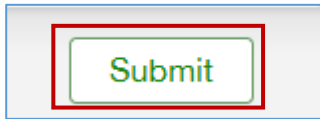
Screen location:	Highlighted area:
	

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- While editing the application/LOI, click “Save” regularly. This site does not autosave
If you are stopping work on the application/LOI but not ready to submit, click “Save and Close.”

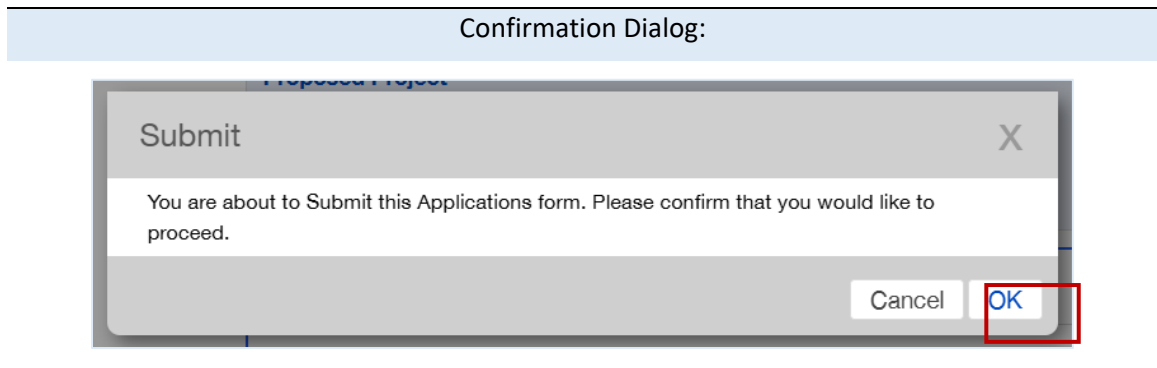
Screen location:	Highlighted area:
	

- When you are ready to submit to Endeavor Health, click “Save and Close.” Then, click “Submit”

Screen location:	Highlighted area:
	

(Continued on next page)

5. Click “**OK**” to confirm your submission



6. You will receive an email confirming submission of your application/LOI

(End)

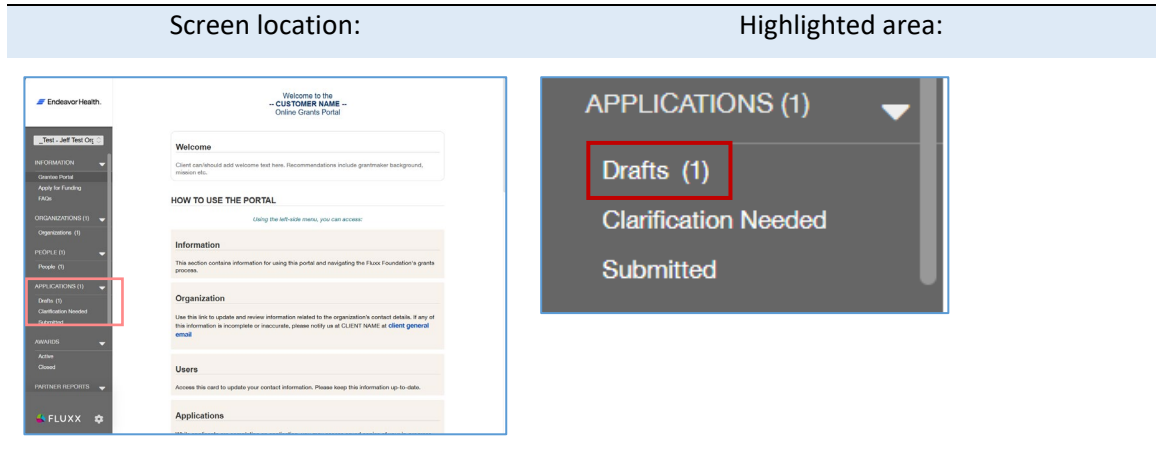
Updating an Existing Impact Award Letter of Intent or Capacity Builder Award Application

If you have started and saved an application/LOI, you may return to add or edit.

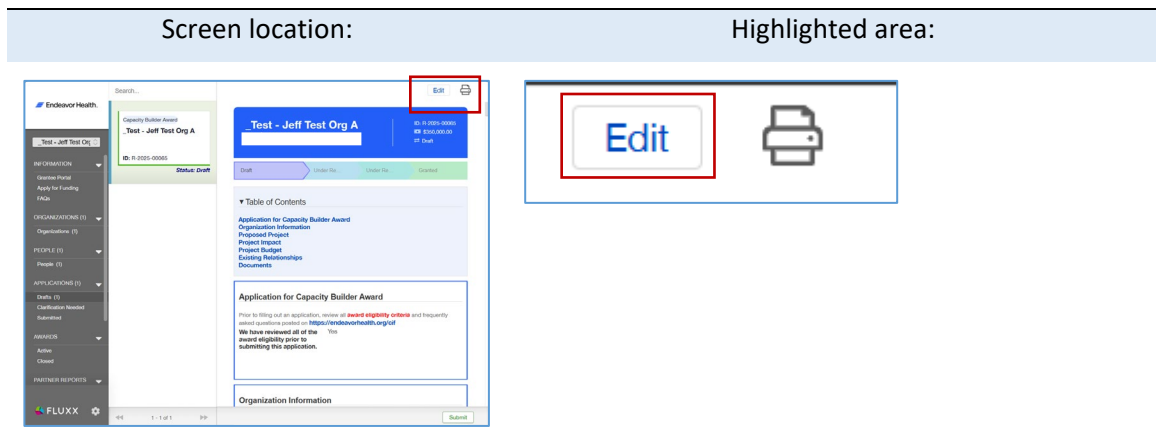
Note: Once you submit, you will no longer be able to edit the application/LOI/

Steps:

1. Log in the [Endeavor Health CIF Application & Partner Site](#) using the individual user profile associated with the desired organization
2. On the left navigation under “APPLICATIONS”, select “Drafts”

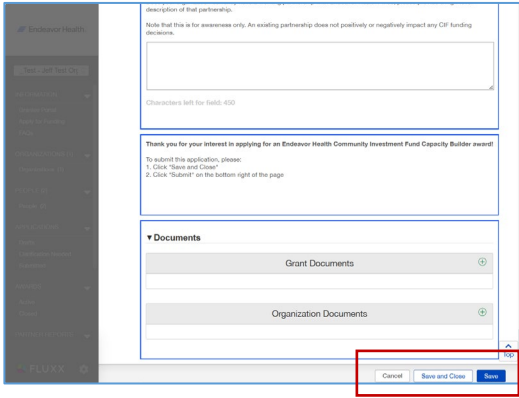



3. On the top right of the screen, click “Edit”

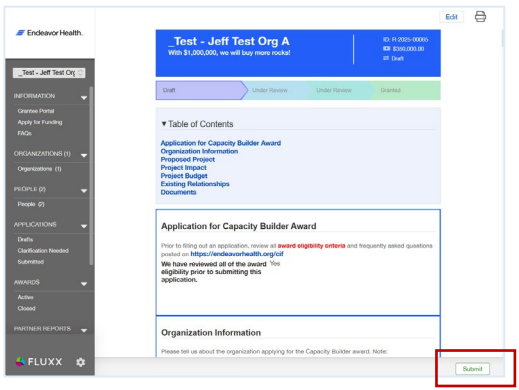



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- Once you are done making any edits, click “Save and Close” at the bottom right of the screen

Screen location:	Highlighted area:
	

- When you are ready to submit to Endeavor Health, click “Submit”

Screen location:	Highlighted area:
	

- You will receive an email confirming submission of your application/LOI

(End)

Collaborating on Your Application (with Others Inside Your Organization)

To work collaboratively on a CIF application/LOI, you can add team members from your organization as “Collaborators.”

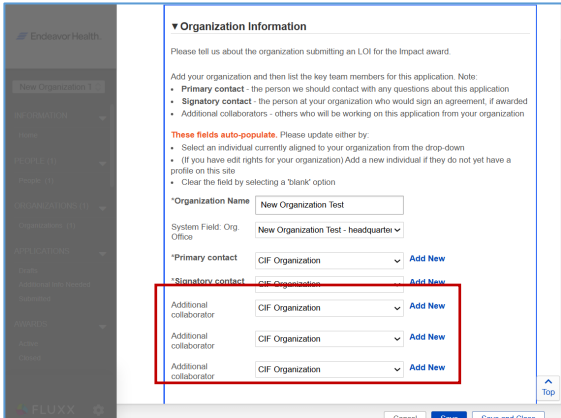

Note: While multiple users can be connected to your organization in Fluxx, each application allows only three collaborators in addition to the organization’s Primary Contact and Signatory Contact.

Steps:

1. Log in to the [Endeavor Health CIF Application & Partner Site](#)

2. If...
 - You have already started an application/LOI, open the draft. Need help? Follow [Updating an Existing Impact Award Letter of Intent or Capacity Builder Award Application](#)
 - You have not yet started an application/LOI, start a new application/LOI. Need help? Follow [Starting and Submitting an Impact Award Letter of Intent or Capacity Builder Award Application](#)

3. Scroll to the “Organization Information” section and add up to 3 “Additional Collaborators” from your organization
 - Use the drop-down to select anyone with both (1) a individual profile and (2) a connection to your organization in Fluxx
 - If your collaborators do not have an individual profile:
 1. Click “Add New.” Note that only organizational moderator’s have this access

Screen location:	Highlighted area:
	

(Continued on next page)

2. Enter the new user's contact information and click "Save"

Dialog:

✕

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Contact Information

Contact Information

Prefix

First Name

Last Name

Email

Title

Save

3. They will receive an email with instructions to set their password and access the system

(End)

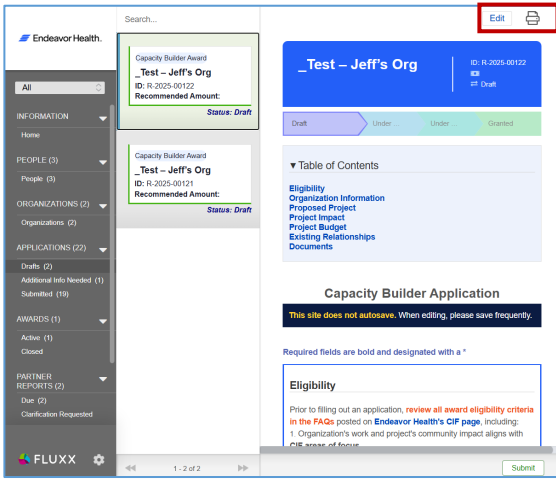
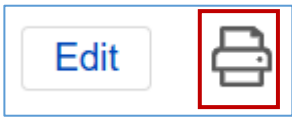
Collaborating on Your Application (with Others Outside Your Organization)

To work collaboratively on a CIF application/LOI with those outside your organization, you can either:

- A. Add those individuals as members of your organization in Fluxx. To do so, have them follow: [Requesting to Connect to an Existing](#)
Or
- B. Have one organization serve to write and submit the application/LOI in Fluxx and print out version for them to review. Follow the steps below to print

Steps:

1. Log in to the [Endeavor Health CIF Application & Partner Site](#)
2. If...
 - You have already started an application/LOI, open the draft. Need help finding a draft application/LOI? Follow [Updating an Existing Impact Award Letter of Intent or Capacity Builder Award Application](#)
Or
 - You have not yet started an application/LOI, start a new application/LOI. Need help starting an application? Follow [Starting and Submitting an Impact Award Letter of Intent or Capacity Builder Award Application](#)
3. Click the “print” icon in the upper right of the screen

Screen location:	Highlighted area:
	

4. A new browser tab/window appears. From the browser, click the ... menu and select “Print...”
Share the printed version with your partners for their input

(End)

Awardee Responsibilities

Completing Quarterly Partner Reports

Brief quarterly awardee (partner) reports are opportunities to share updates, stories, and metrics on awarded project(s) for both Capacity Builder and Impact awards.

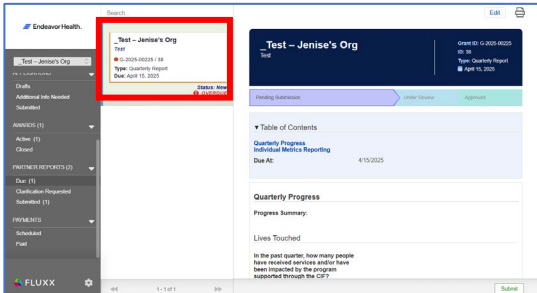

Note: These steps are **only for active partners** being funded through the CIF.

Steps:

1. Log in the [Endeavor Health CIF Application & Partner Site](#)
2. On the left navigation scroll to the bottom to find “PARTNER REPORTS” and select “Due”

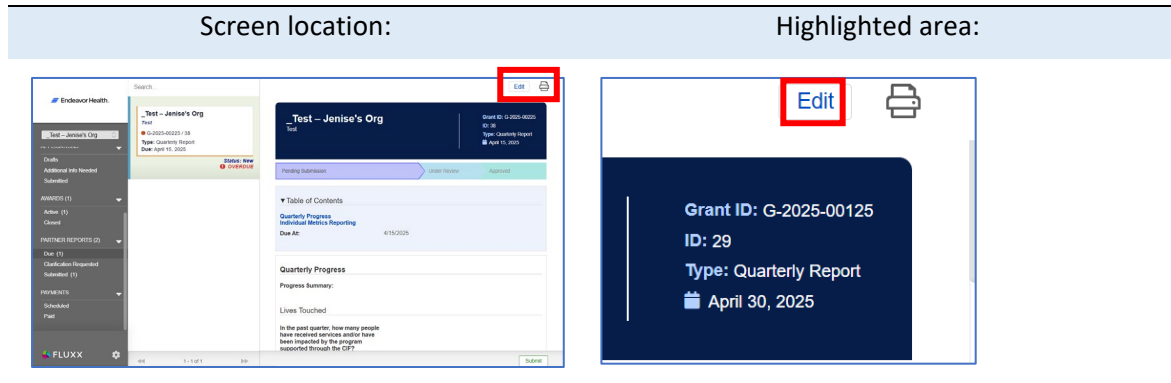
Screen location:	Highlighted area:
	

3. Select the report

Screen location:	Highlighted area:
	

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4. Click “Edit” in the top right corner to begin completing the partner report



5. When you are finished, click “Save and Close” then “Submit”

Once the quarterly report has been submitted, your liaisons and portfolio manager will have an opportunity to review and add to the report. If they have any questions, you will receive an email for additional information.

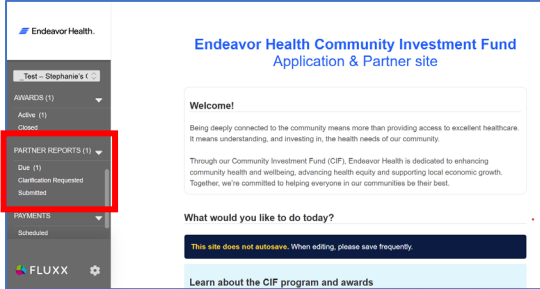
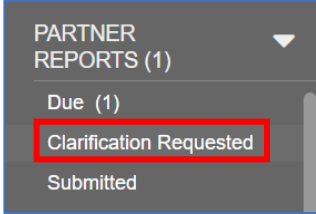
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Responding to Questions on a Quarterly Partner Report

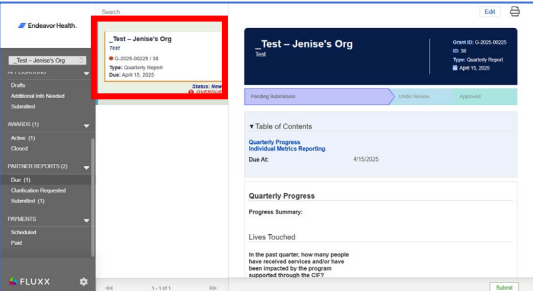

Once a quarterly report has been submitted, your liaisons and portfolio will have an opportunity to review and add to the report. If they have any questions, you will receive an email for additional information.

Steps:

1. Log in the [Endeavor Health CIF Application & Partner Site](#)
2. On the left navigation scroll to the bottom to find “PARTNER REPORTS” and select “Clarification Requested”

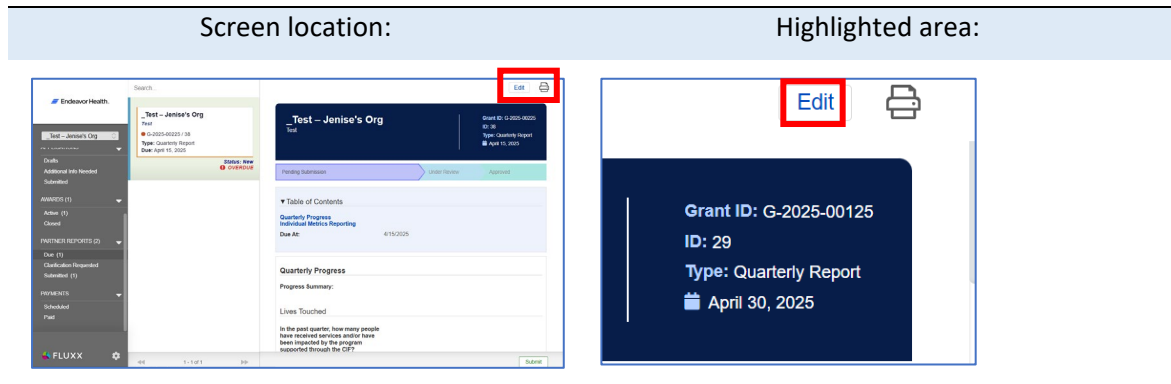
Screen location:	Highlighted area:
	

3. Select the report

Screen location:	Highlighted area:
	

(Continued on next page)

4. Click “Edit” in the top right corner to add new information or clarify existing information in the partner report



5. When you are finished, click “Save and Close” then “Submit”

Once you have resolved to any questions, your portfolio manager will “approve” the report.

(End)

Glossary of Terms and Roles

CIF (Community Investment Fund)

Endeavor Health's Community Investment Funds support partnerships dedicated to enhancing community health and wellbeing, advancing health equity and supporting local economic growth.

Fluxx

An online grants management platform used by Endeavor Health to manage the Community Investment Fund (CIF) application, reporting, and communication process.

Organizational Profile

An account in Fluxx created to represent an organization applying for or managing a CIF award. Only one organizational profile is allowed per organization.

Individual Profile

A user account created by a staff member or representative of an organization. This allows individuals to apply for grants, submit reports, and manage applications.

Moderator

A user within an organization who has permission to manage the organization's account in Fluxx. Moderators can approve or deny user requests to add users to their organization. There can be multiple moderators for each organization.

The user profile who created the organizational profile will automatically be added as the moderator. To request other moderators, reach out to us at community@northshore.org.

Collaborator

An individual user added to an application who can help edit and submit it. Collaborators must have an individual user profile and be connected to the organization's profile to be added to the application.

Application Draft

An in-progress CIF application that has been started but not yet submitted. Users can save and return to draft applications until they are ready to submit.

Partners

Organizations receiving a CIF award.

Partner Report *or* Quarterly Report

A required report submitted by awarded organizations to share updates, stories, and metrics on their funded project(s).

EIN (Employer Identification Number)

A unique identifier assigned to organizations by the IRS, used in Fluxx to verify and connect organizational and individual profiles.