

TLLF'S PORTAL TOOLKIT

A guide to navigating our system
& managing your grant request.

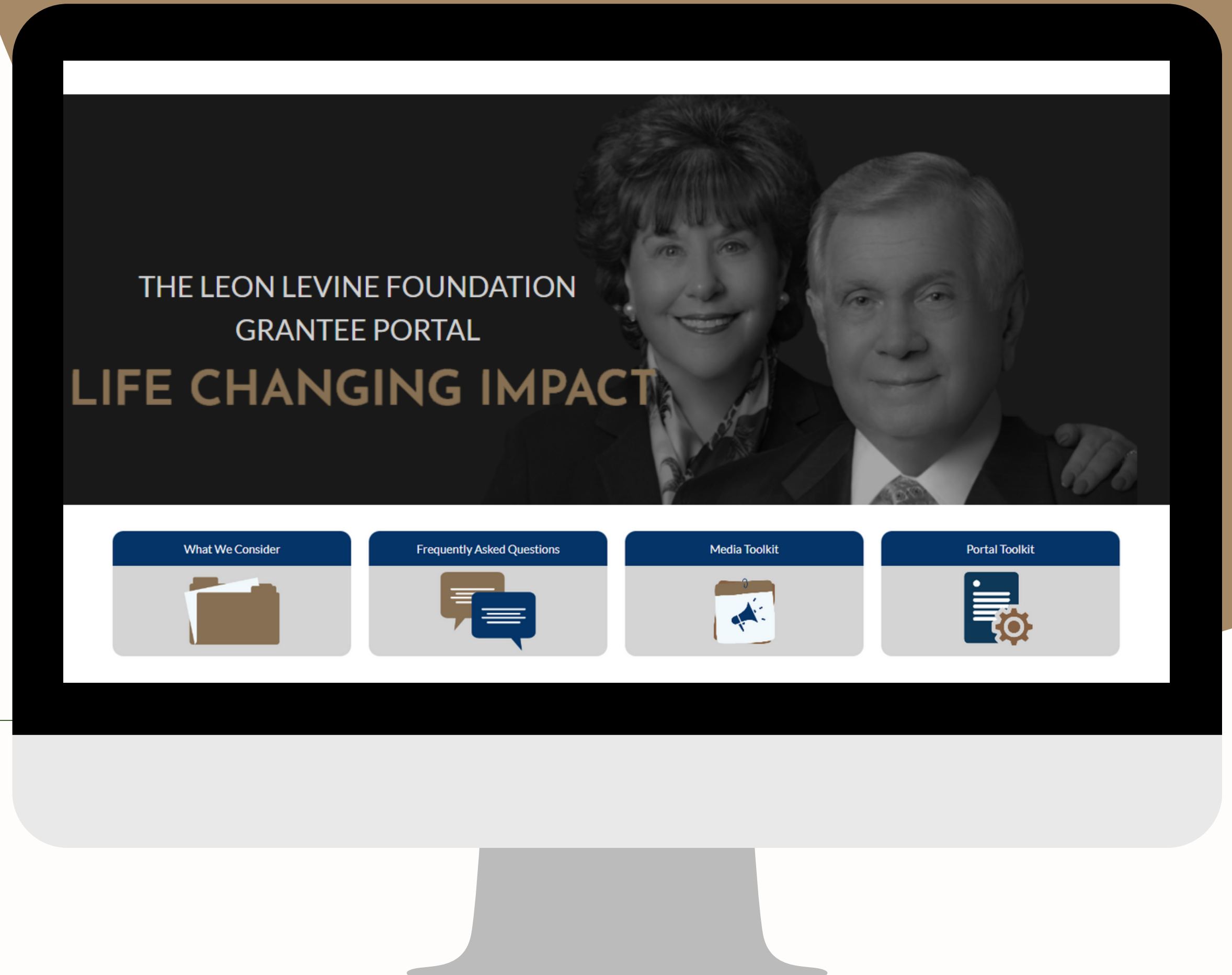




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HOW TO APPLY

I am a...

NEW GRANTEE

Which of these scenarios best apply to you?

I AM INQUIRING ABOUT BEING A GRANTEE

1



Verify you meet all of the Foundation's eligibility requirements.

2



Take the brief eligibility quiz.

[TAKE QUIZ](#)

3



Register as a user in our grantee portal.

[TAKE THE QUIZ TO REGISTER](#)

4



Submit Letter of Inquiry (LOI).

5



The Foundation will contact you within ~60 days if you are invited to apply for a grant.

First things first:

If you are a new prospective grantee, you will need to register your organization in our system. Begin by navigating to the "How To Apply" page of our website.*

- Click on the "New Grantee" block.
- Select "I Am Inquiring."
- Scroll down to the numbered application steps and select "Take the Quiz to Register."



Note: If TLLF contacted your organization and invited a proposal (vs. you submitting an LOI), your application will already be available in the portal, and you can use the login details provided by admin support to enter the portal.

Taking our eligibility quiz

- Click through the questions of the eligibility quiz.
- If you successfully meet our eligibility requirements, you'll see the "Congratulations" window.
- Select "Register" to continue setting up your account.



* 1. Is your organization recognized by the IRS as a public charity under Section 501(c)(3)?

Yes

NEXT

Congratulations!

You have met the qualifications to submit an LOI for The Leon Levine Foundation.

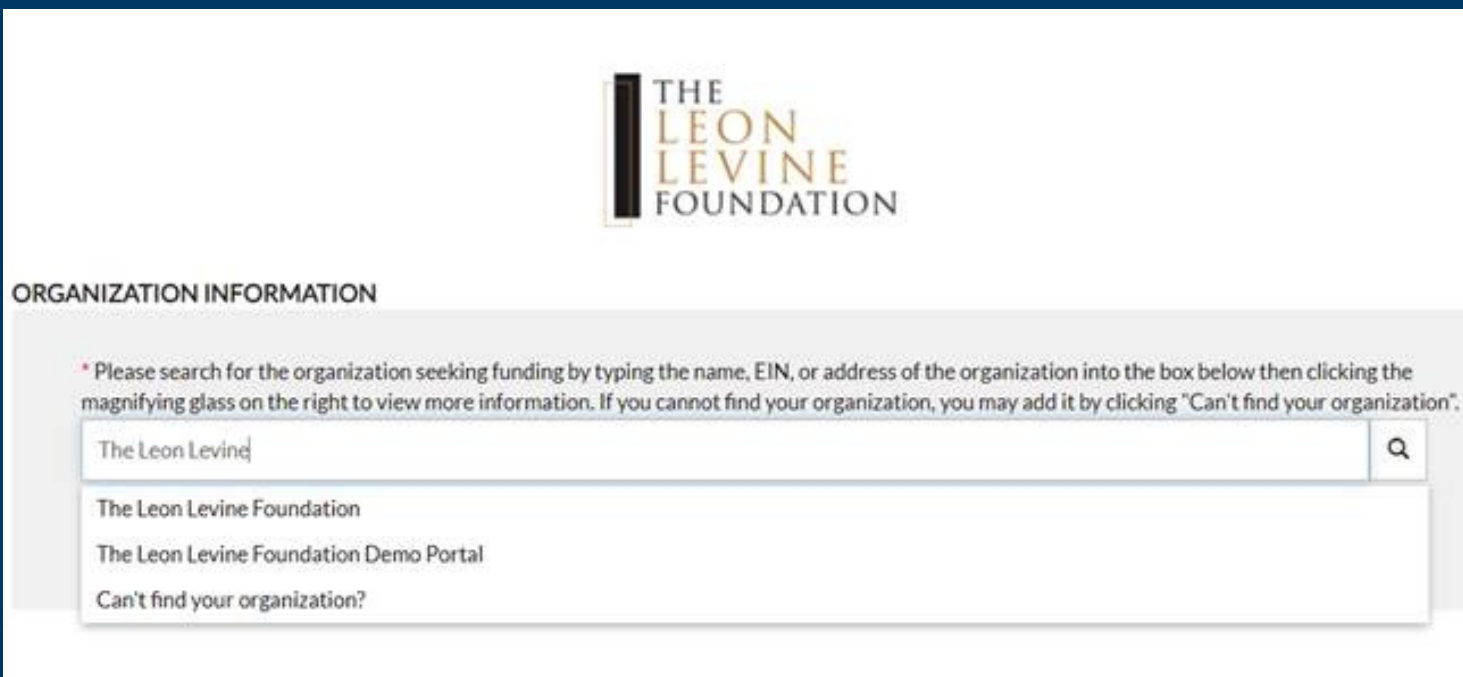
Please choose 'Login' if you have an existing username/password.

LOGIN

Please choose 'Register' to setup a new account.

REGISTER

Once you gain access to the portal, please click the button on the home page that says 'Start an LOI'.



THE LEON LEVINE FOUNDATION

ORGANIZATION INFORMATION

* Please search for the organization seeking funding by typing the name, EIN, or address of the organization into the box below then clicking the magnifying glass on the right to view more information. If you cannot find your organization, you may add it by clicking "Can't find your organization".

The Leon Levine

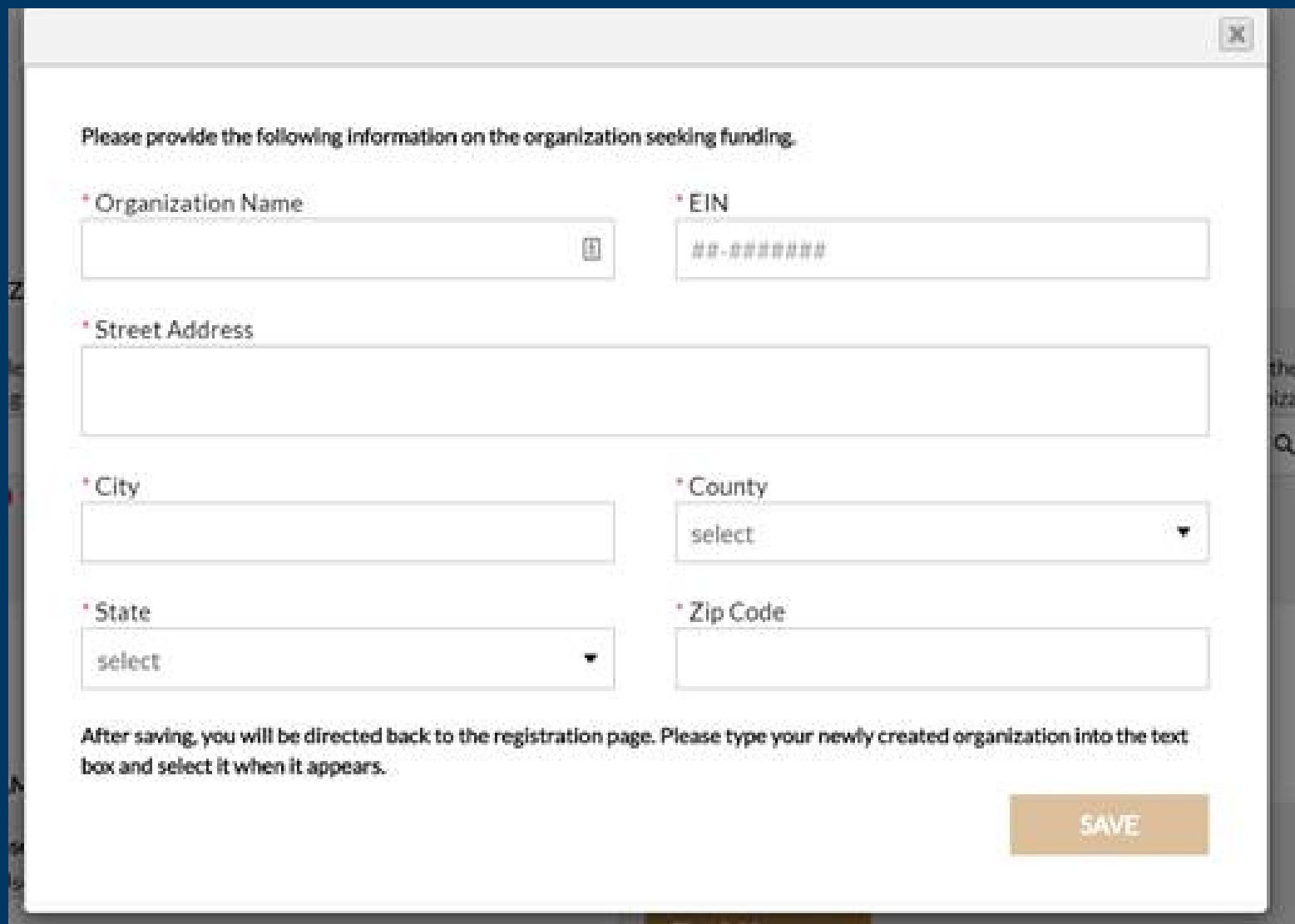
The Leon Levine Foundation

The Leon Levine Foundation Demo Portal

Can't find your organization?

Setting up your account:

- Search for your organization by name; it should be available for you to select if it's already registered in our system. If you haven't registered yet, choose "Can't Find Organization," and fill in the fields in the pop-up window.
- Provide the requested contact information.
- Look for an automated email which will be sent to your registered email address. Your email address will be your username.
- Use the link included to set your password and finish the registration process.



Please provide the following information on the organization seeking funding.

* Organization Name

* EIN

* Street Address

* City

* County

* State

* Zip Code

After saving, you will be directed back to the registration page. Please type your newly created organization into the text box and select it when it appears.

SAVE

Creating contact roles for an existing organization:

- Log in to the portal and click on the "My Organization" tab.
 - Scroll down to the "Contact" section and follow the prompts provided to search for the contact you have in mind.
 - Executive Director information is required. Be sure to click the "Executive Director" checkbox when finalizing this contact. Then click "Add Role."
- ★ Note: the logged-in party (i.e. you) should be displayed on screen when you click the magnifying glass to search for additional organization contacts, as indicated here. Be sure to click "Add Role" so that your name appears in the "Contact List."

THE LEON LEVINE FOUNDATION

HOME MY ORGANIZATION REQUESTS REPORTS

Contacts

Designate two (three maximum) contacts for your organization below. Executive Director/CEO information is required; you may select two other staff contacts. If your organization has a generic email address associated with grants and development, we recommend creating an account associated with this address. All contacts will receive all communications from The Leon Levine Foundation (TLLF) and will receive access to the Grants Portal. Portal accounts may be shared amongst staff.

Name	Title	Email
------	-------	-------

ADD CONTACT

Please click the magnifying glass to select a contact. If the contact you are looking for appears, select it. If not, close the pop-up window and click the "Add a New Contact" button to create a contact record for this person. After "Adding a New Contact" you must click the magnifying glass, select the contact and click "Add Role" to add them to the Contact List above.

Contact Grant Role (click the magnifying glass to search for a contact)

Don't see the contact you are looking for? Add a New Contact

Find

Name - Title - Email	Organization Name
Test User - TLLF Contractor - grantsupport@leonlevinefoundation.org	Leon Levine Test 2023

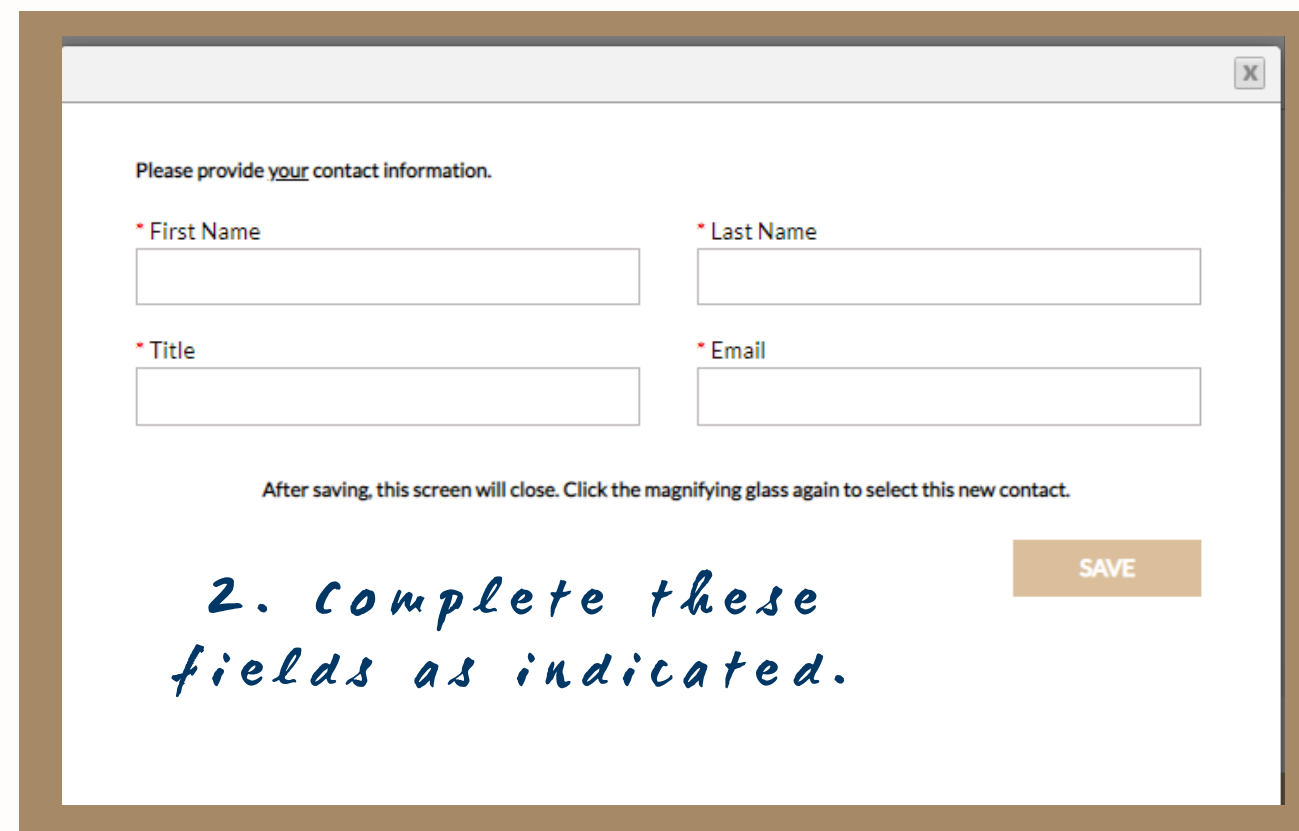
Select Row

Your contact & user information should appear here, along with any other organization contacts already in our system.

Close

Adding new contacts to an existing organization:

- If the desired contact is not already in our system, you will click "Add a New Contact" to provide their information.
- After inputting the contact details, be sure to follow the rest of the prompts provided to ensure this contact is included in your TLLF contact list.



Please provide your contact information.

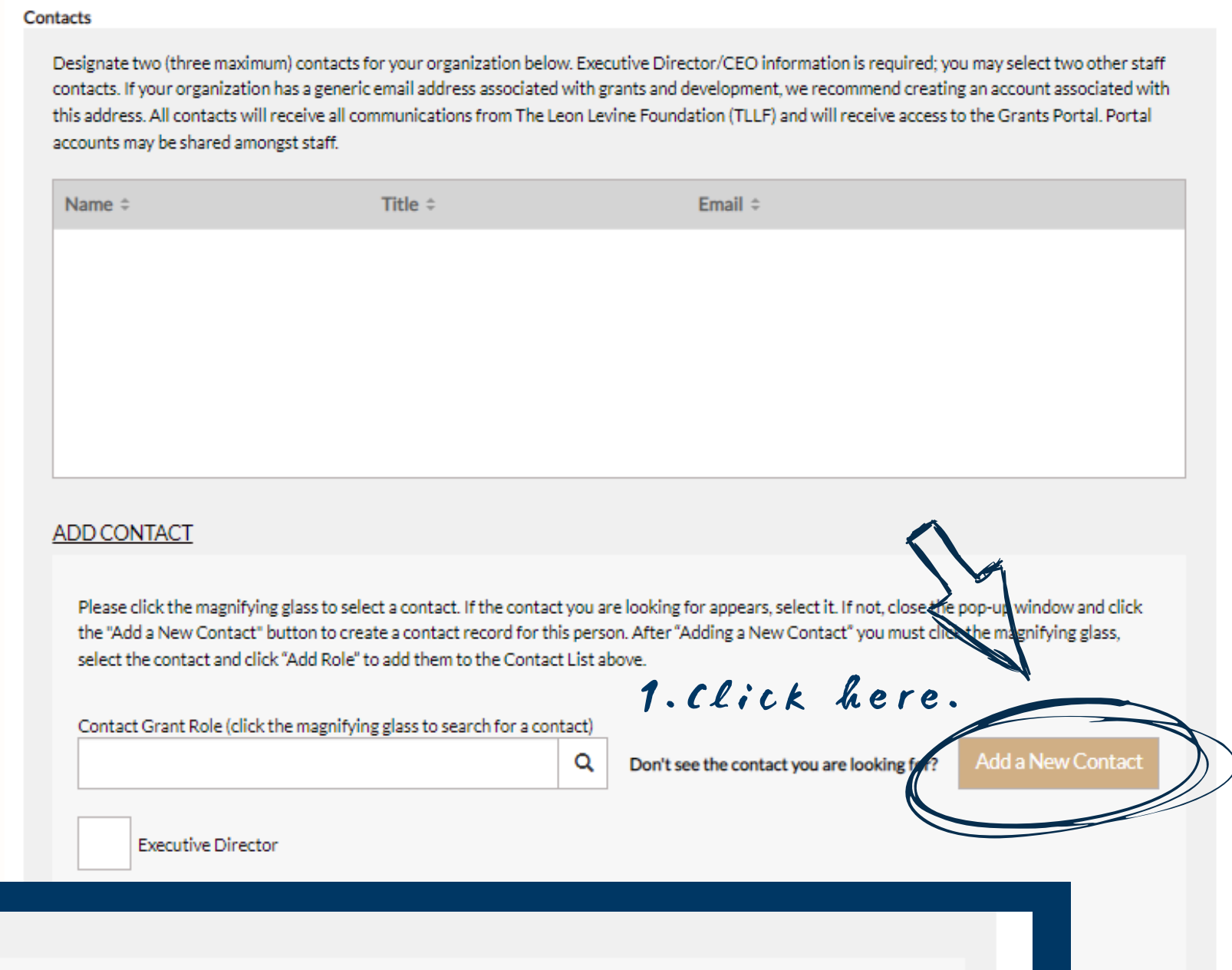
* First Name * Last Name

* Title * Email

After saving, this screen will close. Click the magnifying glass again to select this new contact.

2. Complete these fields as indicated.

SAVE



Contacts

Designate two (three maximum) contacts for your organization below. Executive Director/CEO information is required; you may select two other staff contacts. If your organization has a generic email address associated with grants and development, we recommend creating an account associated with this address. All contacts will receive all communications from The Leon Levine Foundation (TLLF) and will receive access to the Grants Portal. Portal accounts may be shared amongst staff.

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Contact Grant Role (click the magnifying glass to search for a contact)

Don't see the contact you are looking for?

☐ Executive Director

1. Click here.



ADD CONTACT

Please click the magnifying glass to select a contact. If the contact you are looking for appears, select it. If not, close the pop-up window and click the "Add a New Contact" button to create a contact record for this person. After "Adding a New Contact" you must click the magnifying glass, select the contact and click "Add Role" to add them to the Contact List above.

Contact Grant Role (click the magnifying glass to search for a contact)

Don't see the contact you are looking for?

☐ Executive Director

3. Make sure you click the magnifying glass again, select the contact, and click "Add Role" to include them in your contact list.

ADD Role

SAVE

Submitting an LOI, step #1:

Begin by selecting the "Requests" tab on the portal and clicking the "Start an LOI" button. NOTE: You will receive an error message if you already have an LOI in process. Look under the "Requests" tab (and LOI subheader) below to find any pre-existing LOI requests.

The screenshot displays the user interface of The Leon Levine Foundation portal. At the top, a navigation bar includes the logo, 'HOME', 'MY ORGANIZATION', 'REQUESTS' (circled in blue), 'REPORTS', and 'Test User'. Below the navigation bar, a message states: 'The submission of a request does not guarantee future funding. Upon submission of your request, you will be given the opportunity to download and/or print a PDF copy. After submission, the PDF copy will also be available by clicking on the submitted record under the "Requests" tab.' In the center, a 'START AN LOI' button is highlighted with a blue arrow pointing from the 'REQUESTS' tab. Below the button, the word 'LOIs' is circled in blue. To the right of 'LOIs', a handwritten note reads: 'Pre-existing LOIs will be displayed here.' At the bottom, there are tabs for 'OPEN' and 'CLOSED', and a 'REQUESTS' label.

THE LEON LEVINE FOUNDATION

HOME MY ORGANIZATION REQUESTS REPORTS Test User

The submission of a request does not guarantee future funding. Upon submission of your request, you will be given the opportunity to download and/or print a PDF copy. After submission, the PDF copy will also be available by clicking on the submitted record under the "Requests" tab.

START AN LOI

LOIs Pre-existing LOIs will be displayed here.

OPEN CLOSED

REQUESTS

Submitting an LOI, step #2:

Once redirected to this page, click the "Start a New LOI" button.

INSTRUCTIONS:

- o The submission of a Letter of Inquiry (LOI) does not guarantee future funding. Upon submission of your LOI, you will be given the opportunity to download and/or print a PDF copy. After submission, the PDF copy will also be available by clicking on the submitted LOI under the "Requests" tab.
- o *Designates a required field.

The submission of a Letter of Inquiry (LOI) does not guarantee future funding. If you have already started an LOI, please navigate to the "Requests" tab above. The started LOI will be listed under the "OPEN" tab of the LOI subheader. Upon submission of your LOI, you will be given the opportunity to download and/or print a PDF copy. After submission, the PDF copy will also be available by clicking on the submitted LOI.



Submitting an LOI, step #3:

Before you can enter materials pertaining to your LOI, you must click the "My Organization" button and ensure the organization details on record are accurate. Once you save this information, you will be redirected to the LOI form.

The image shows a two-part screenshot of a web application. The left part shows a progress bar with three steps: 'Inquiry Details' (active), 'Attachments', and 'Review and Submit'. Below the progress bar, there is a 'My Organization' button circled in blue. A large brown arrow points from this button to the right part of the screenshot. The right part shows the 'Organization Information' form, which is titled 'As part of The Leon Levine Foundation's (TLLF) due diligence process, we require that you review the "My Organization" tab before beginning the application (also referred to as request). Review the following information for accuracy. Update as necessary.' The form contains several fields, some marked with an asterisk to indicate they are required. The fields are: 'Account Name' (filled with 'Leon Levine Test 2023'), 'Phone' (filled with '704-817-6500'), 'Website' (filled with 'www.leonlevinefoundation.org'), 'Year Established' (filled with '1995'), 'EIN' (filled with '12-3456789'), and 'Mission Statement' (filled with 'Test field.'). A red character count '1,989/2,000' is visible at the bottom right of the form.

Inquiry Details Attachments Review and Submit

The status bar, shown above, designates different sections of the LOI. The LOI does not need to be completed chronologically. You may navigate between sections by clicking on the corresponding bubble in the status bar. The status bar is NOT a representation of your progress toward submission; it is purely a navigation tool. If any sections are missing responses, you will be notified before submission.

The submission of a Letter of Inquiry (LOI) does not guarantee future funding. Upon submission of your LOI, you will be given the opportunity to download and/or print a PDF copy. After submission, the PDF copy will also be available by clicking on the submitted LOI under the "Requests" tab.

As part of The Leon Levine Foundation's (TLLF) due diligence process, we require that you review the "My Organization" tab before beginning the application (also referred to as LOI). Questions are designed to give TLLF an overview of the organization's size and scope of activities, as well as details about the project. To review the "My Organization" tab please click on the "My Organization" button below.

My Organization

Inquiry Details

Descending character counts will display in red text when clicking outside of the text box that you are working in.

* Designates a required field.

* Select the type of support your organization is requesting.

select

* How did you hear about The Leon Levine Foundation (TLLF)?

select

* Select the Mission Area that fits with your request.

select

Organization Information

As part of The Leon Levine Foundation's (TLLF) due diligence process, we require that you review the "My Organization" tab before beginning the application (also referred to as request). Review the following information for accuracy. Update as necessary.

* Designates a required field.

* Account Name

Leon Levine Test 2023

* Phone

704-817-6500

* Website

www.leonlevinefoundation.org

* Year Established

1995

* EIN

12-3456789

* Mission Statement

Test field.

1,989/2,000

Submitting an LOI, step #4:

Continue to progress through the LOI application, saving your information as you go (do not leave the page idle without saving your work). When ready, review the information, and then click submit.

The screenshot shows the 'Attachments' step of the LOI application. At the top, a progress bar indicates the current step is 'Attachments', with 'Inquiry Details' and 'Review and Submit' as previous and next steps respectively. Below the progress bar, the 'Attachments' section contains instructions: 'Select a file for the required box and click the corresponding "Upload" button. A green check mark will appear if the attachment was successfully uploaded. Files will be renamed to the corresponding sub header of the file box. Other relevant attachments are optional but may be uploaded if you choose.' Below the instructions is a table with three columns: '#', 'File Name', and 'Upload Date'. The table is currently empty. Below the table, there are three upload sections: 'Detailed Organization Budget (Current Fiscal Year)' with an 'Upload' button, 'Other Attachment(s)' with an 'Upload' button, and 'Annual Report' with an 'Upload' button. At the bottom of the form, there are two buttons: 'PREVIOUS' and 'SAVE & NEXT'.

#	File Name	Upload Date
---	-----------	-------------

* Detailed Organization Budget (Current Fiscal Year)

Other Attachment(s)

Annual Report

The screenshot shows the 'Review and Submit' step of the LOI application. At the top, a progress bar indicates the current step is 'Review and Submit', with 'Inquiry Details' and 'Attachments' as previous steps. Below the progress bar, the main content area contains the text: 'After you have completed all sections click on the button below to review and submit.' Below this text is a large orange button labeled 'Preview & Submit', which is circled in blue. At the bottom of the form, there are two buttons: 'PREVIOUS' and 'SAVE & NEXT'.

After you have completed all sections click on the button below to review and submit.

Submitting a grant agreement:

Click the "Reports" tab and look for the appropriate request. Select the request to get started.

THE LEON LEVINE FOUNDATION

HOME

MY ORGANIZATION

REQUESTS

REPORTS

Test User

- **Grant Agreement** – An agreement between The Leon Levine Foundation (TLLF) and the nonprofit partner detailing uses for funds. Once an award decision has been made, TLLF will email a copy of the Grant Agreement to be signed and uploaded to the portal within 30 days.
- Click below to view the Portal Toolkit for detailed instructions on uploading each document.

Portal Toolkit

	Grantee Report ↑	Grantee Report Type	Request Name ↑	Status	Due Date	Submission Date
1	GR-000008910	Grant Agreement	Leon Levine Test - General Support	Requested	5/31/2023	

Navigate to this tab to begin.

Your organization's requests will be displayed in this field.

Uploading your grant agreement:

Once you have reviewed, signed, and dated your grant agreement, save the document on your device of choice. You can then upload this version of the document to the portal. When you have successfully uploaded your attachment(s), a green check mark will appear beside the document(s).

The screenshot shows a web portal for uploading grant agreements. At the top, there are two input fields: 'REPORT TYPE' with the value 'Grant Agreement' and 'REQUEST NAME' with the value 'Leon Levine Test - General Support'. Below these is a 'DUE DATE' field showing '05/31/2023' with a calendar icon. A text prompt says 'Please upload your grant agreement here.' followed by a file selection input and an 'Upload' button. The 'Upload' button is circled in blue. Below the upload section is a table with columns 'File Name' and 'Upload Date'. The table is currently empty. Handwritten blue text in the table area reads: 'click the upload button to search for your SIGNED and DATED grant agreement on your desktop.' At the bottom right, there is a 'SUBMIT' button. Handwritten blue text next to it says 'Don't forget to click submit!' with an arrow pointing to the button.

REPORT TYPE
Grant Agreement

REQUEST NAME
Leon Levine Test - General Support

DUE DATE
05/31/2023

Please upload your grant agreement here.

Upload

File Name	Upload Date
<i>click the upload button to search for your SIGNED and DATED grant agreement on your desktop.</i>	

Don't forget to click submit!

SUBMIT

Uploading files:

- Select the button that looks like a filing box.
- Locate the document you wish to upload.
- Click the upload button.
- Look for a green check mark to appear beside your document(s), which signals that you have successfully uploaded your file(s).

Note the filing box here and the upload button.

Look for the green check mark to confirm your upload.

Resetting your password:

Click on your username tab in the upper-right corner of the webpage. Then click "Reset Password."




HOME

MY ORGANIZATION

REQUESTS

REPORTS

 Test User

Home

Reset Password

Organization Profile

Logout

THE LEON LEVINE FOUNDATION
GRANTEE PORTAL

CREATING LIFE CHANGING IMPACT

Resetting your password continued:

Follow the directions provided, and the "Edit User" pop-up window will appear as shown below.

THE LEON LEVINE FOUNDATION

HOME MY ORGANIZATION REQUESTS REPORTS Test User

To reset your password, select "Edit" below and check the "Reset Password" checkbox. You will receive an email with a link to set a new password.

Test User
Leon Levine Test 2023

Salutation

Name
Test User

Email
grantsupport@leonlevinefoundation.org

Reset Password
☐

Edit User

About

Salutation
--None--

Title
TLLF Contractor

* Name

First Name
Test

* Last Name
User

* Email
grantsupport@leonlevinefoundation.org

Reset Password
☐

Direct Phone

Cancel Save

Be sure to check this box.

Finalizing your password reset:

You will receive the following email and can click the link provided to navigate to the password reset webpage.


Your name will appear here.

Hi Test,

Please [set a new password](#) for The Leon Levine Foundation Grantee Portal.

If you did not request a password reset, please contact adminsupport@leonlevinefoundation.org.

Thank you,
The Leon Levine Foundation
6000 Fairview Rd.
Suite 1525
Charlotte, NC 28210



Change Your Password

Enter a new password for grantsupport@leonlevinefoundation.org. Make sure to include at least:

- ☐ 8 characters
- ☐ 1 uppercase letter
- ☐ 1 lowercase letter
- ☐ 1 number
- ☐ 1 special character ⓘ

* New Password

* Confirm New Password

Change Password

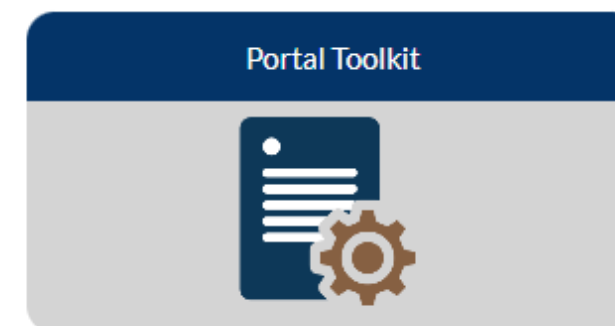
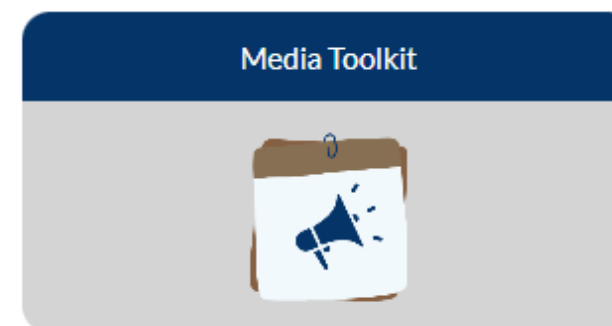
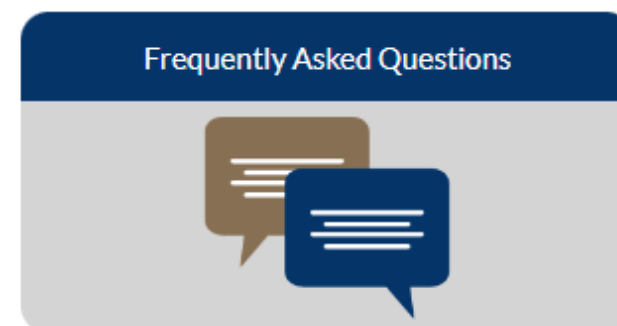
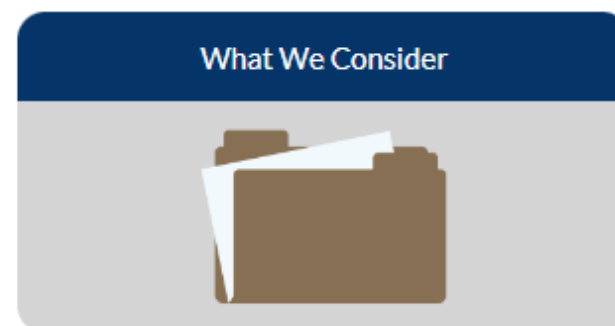
Password was last changed on 5/1/2023 10:52 AM.

Resources for you:

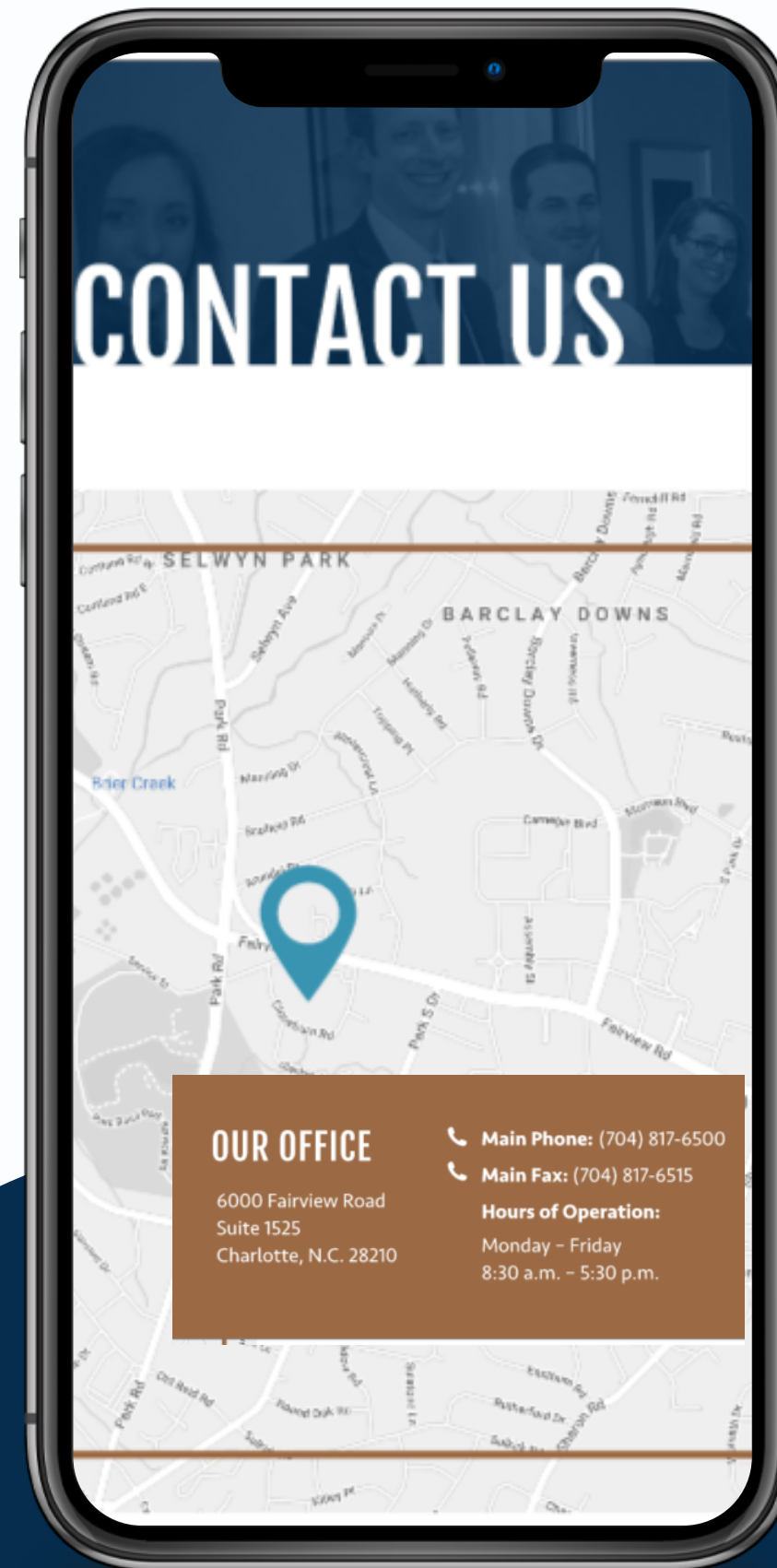


*Be sure to check out
these resources which we've
designed with you in mind!*

RESOURCES



How to
reach us:



Got questions? If you need help
navigating the system, email us at:
adminsupport@leonlevinefoundation.org.

Useful Links:

- [TLLF Website](#)
- ["How To Apply" Page](#)
- [Grantee Portal](#)
- [Media Toolkit](#)
- [FAQs](#)