TLLF'S PORTAL TOOLKIT

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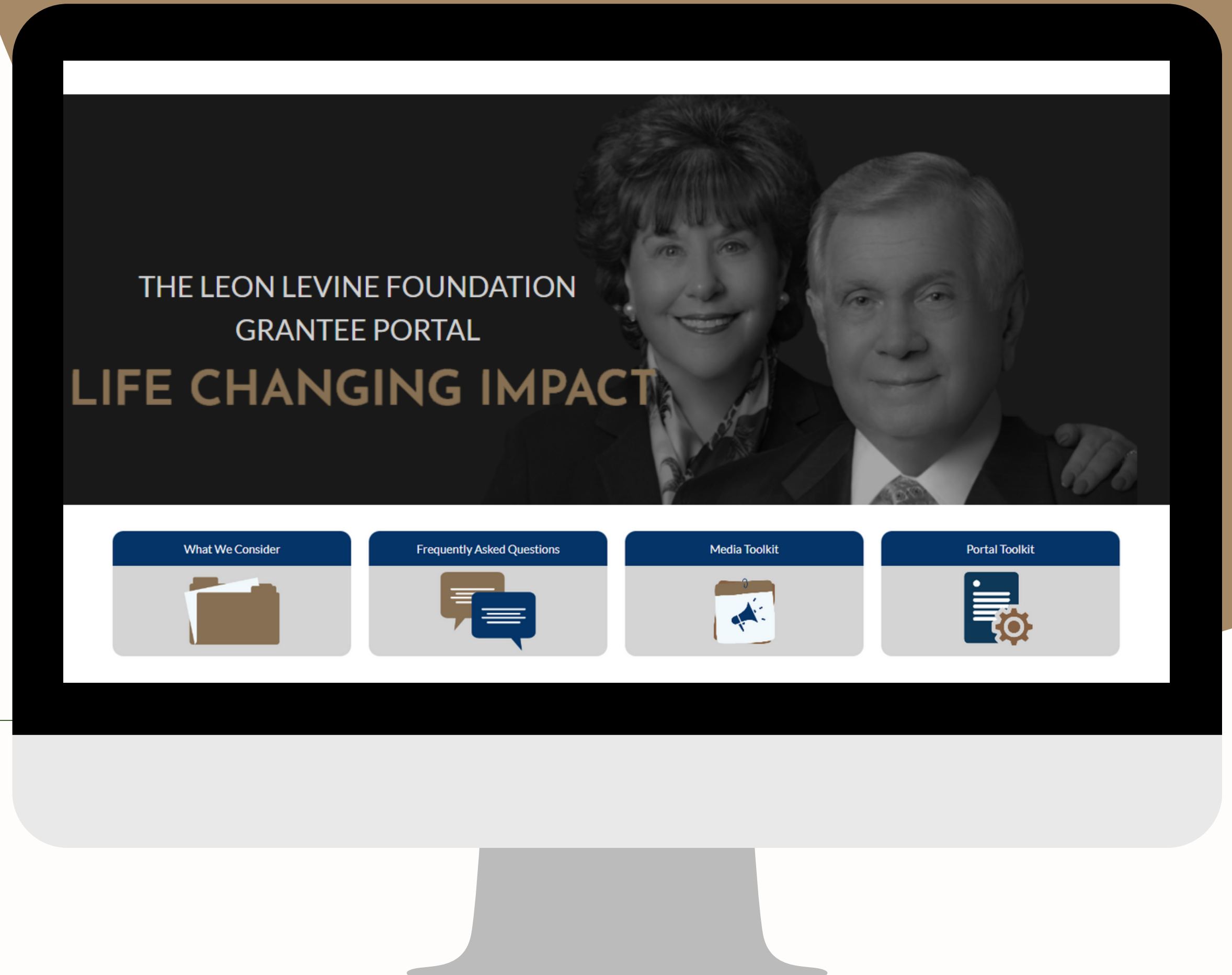

THE LEON LEVINE FOUNDATION
GRANTEE PORTAL

LIFE CHANGING IMPACT

What We Consider

Frequently Asked Questions

Media Toolkit

Portal Toolkit

Table of contents:

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.**

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.**

5

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."**

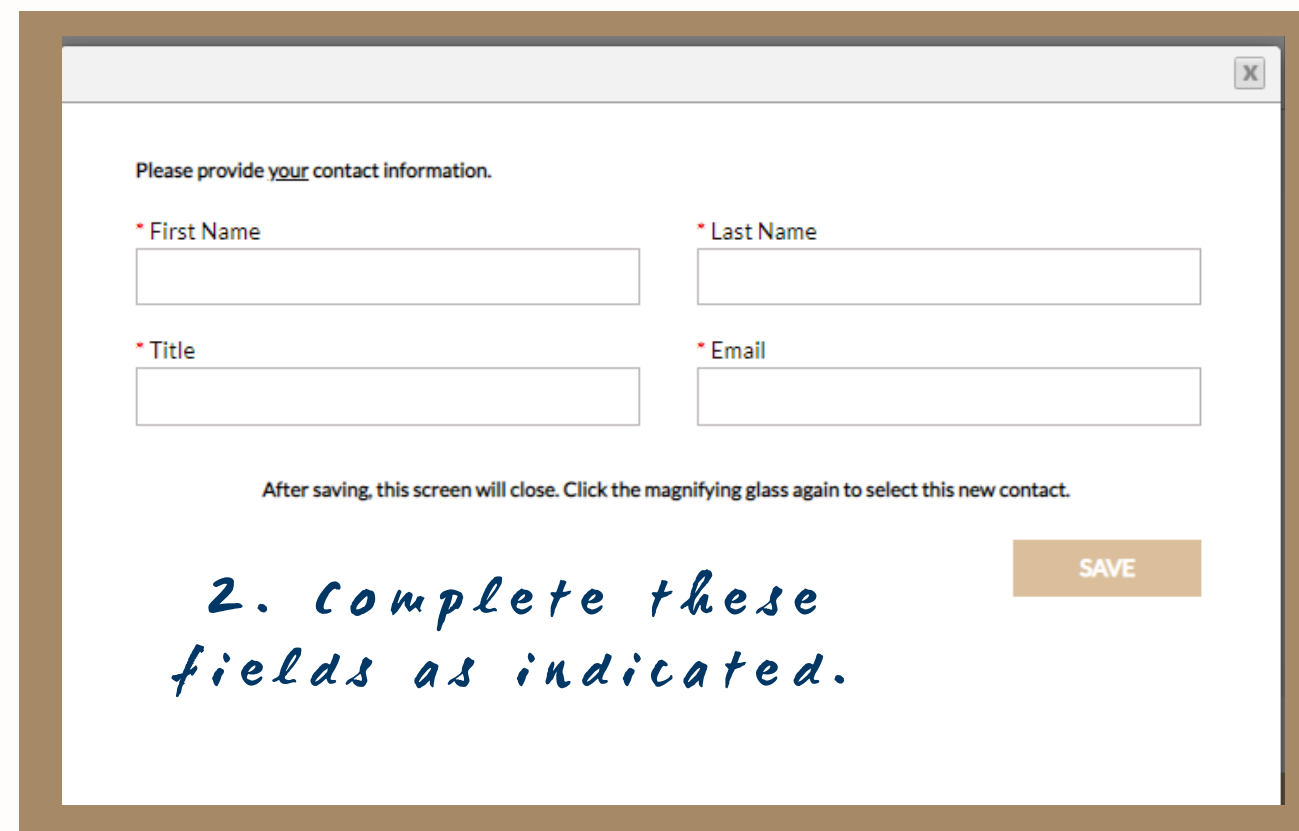*Your contact & user information should appear here, along with any other organization contacts already in our system.*

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.**

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**

1. Click here.

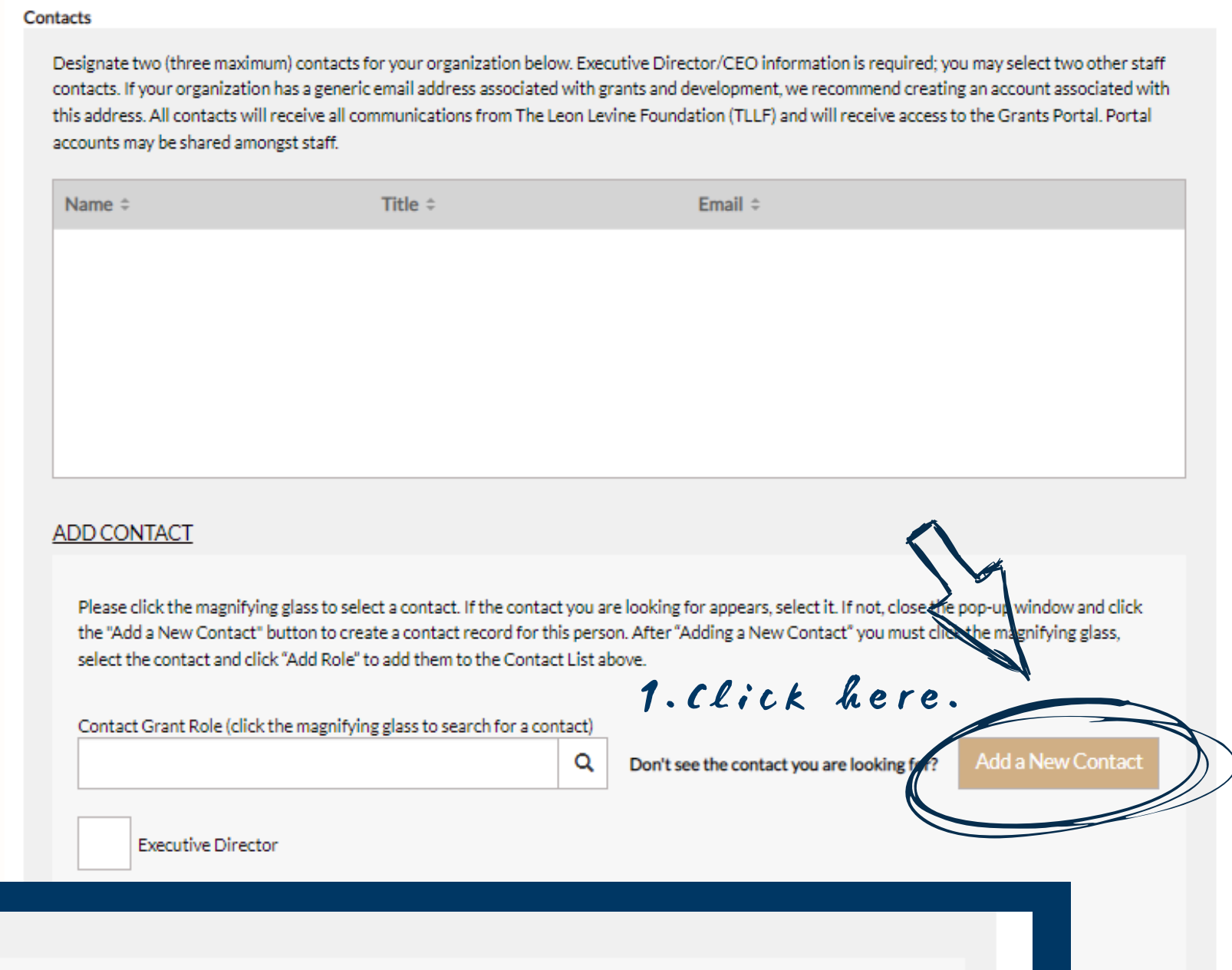☐ Executive Director

---

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.

SAVE

2. Complete these fields as indicated.

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**

☐ Executive Director

Add Role

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

SAVE

7

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.

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.

Start a New 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.

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.

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

Navigate to this tab to begin.

- **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			

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

12

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).

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 ⇕

Click the upload button to search for your SIGNED and DATED grant agreement on your desktop.

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.

Your document should appear here.

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."

Resetting your password continued:

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

Finalizing your password reset:

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

Hi Test,

Your name will appear here.

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

THE LEON LEVINE FOUNDATION

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 ⓘ

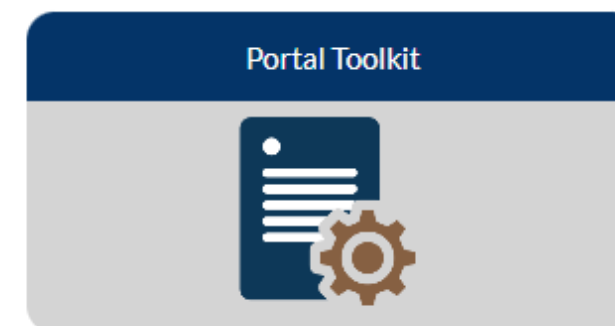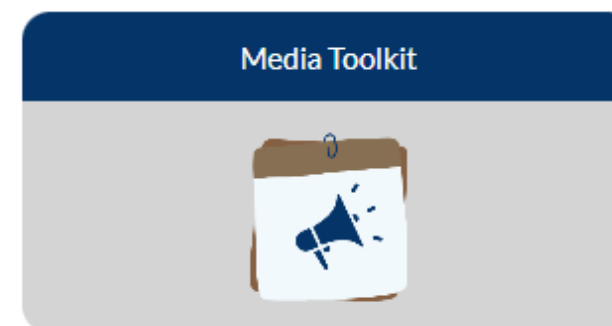* New Password

* Confirm New Password

Change Password

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

Resources for you:

THE LEON LEVINE FOUNDATION
GRANTEE PORTAL

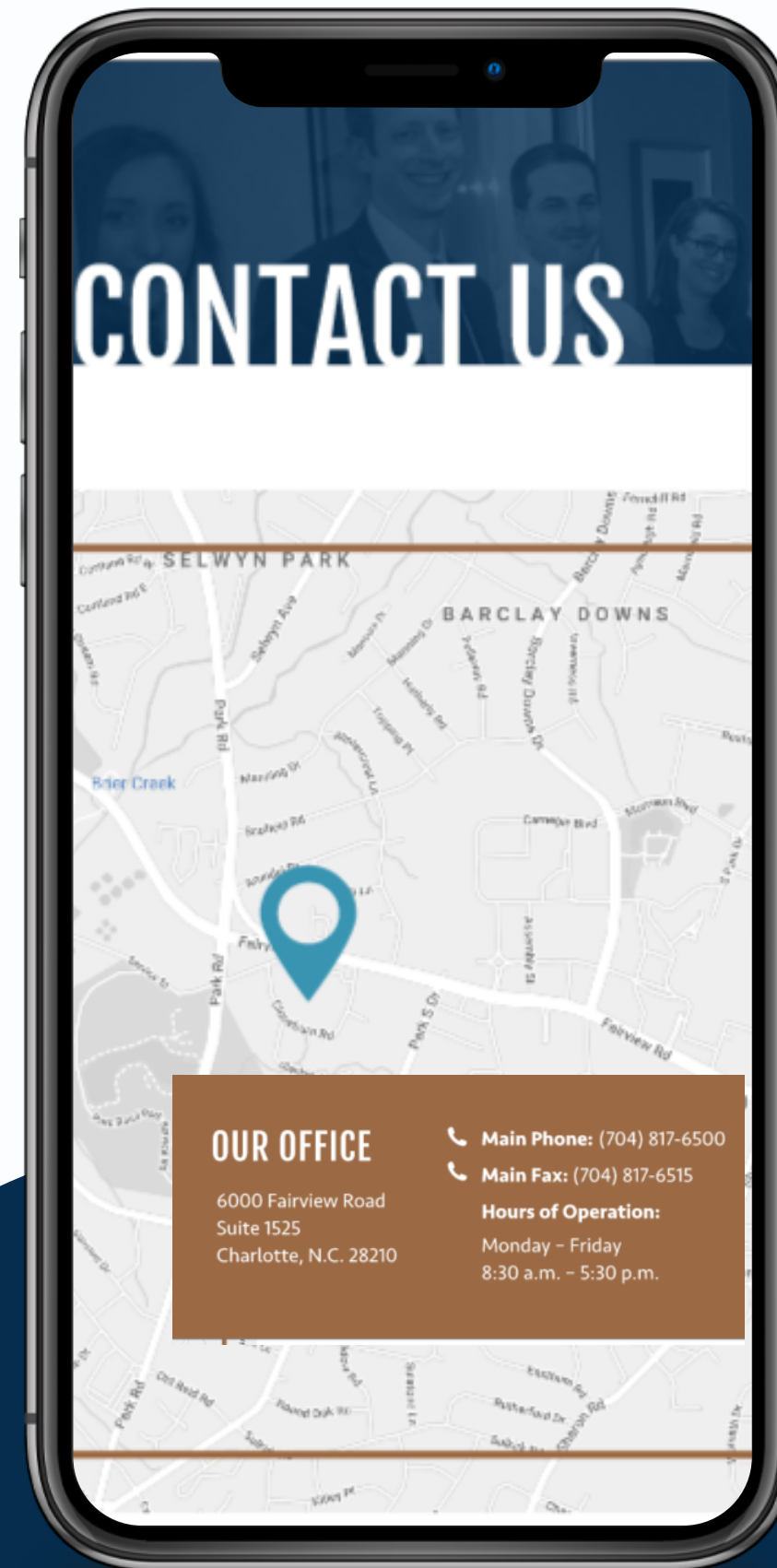CREATING LIFE CHANGING IMPACT

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

RESOURCES

| What We Consider | Frequently Asked Questions | Media Toolkit | Portal Toolkit |
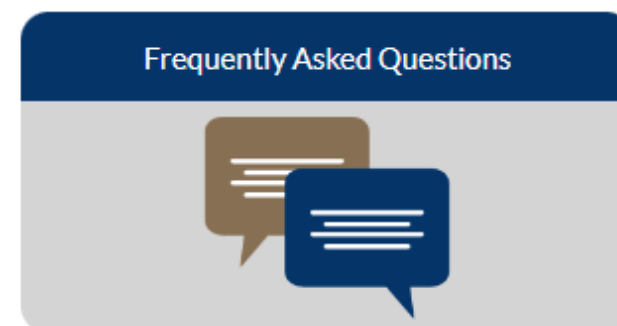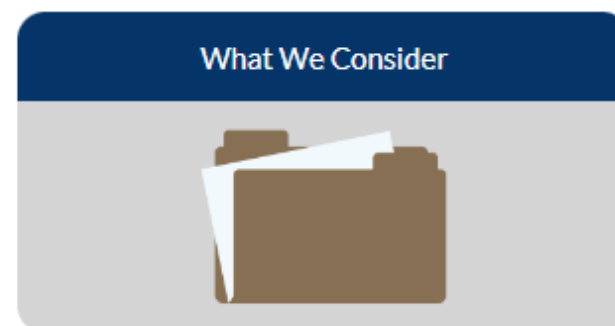
How to reach us:

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

CONTACT US

OUR OFFICE

6000 Fairview Road
Suite 1525
Charlotte, N.C. 28210

Main Phone: (704) 817-6500
Main Fax: (704) 817-6515

Hours of Operation:
Monday – Friday
8:30 a.m. – 5:30 p.m.

Useful Links:

- **TLLF Website**

- **"How To Apply" Page**

- **Grantee Portal**

- **Media Toolkit**

- **FAQs**