

Logging onto the Grants Portal

1. Go to our website www.oct.org.nz.
2. On the Home page, click on the yellow button 'Enter Grants Portal'.

Access to the new Grants Portal
is via our website
www.oct.org.nz



Existing User

3. Use the email address or your firstname_lastname that was set up as your log in.
 - If you do not know your password, you can click on 'Reset or New Password'.
 - You will receive an email with a link for you to set up your password.

Secure | https://oct.fluxio.io/user_sessions/new
Bookmarks



Welcome to the Otago Community Trust Grants Portal

Login Now:

[Reset or create password](#)

Existing User:

If you believe that your organisation has registered to apply online in the past and you do not have the login details please contact us on 0800 10 12 40.

New User:

In order to be considered for funding we need to know a little more about your organisation, please complete our New Organisation Eligibility Quiz.

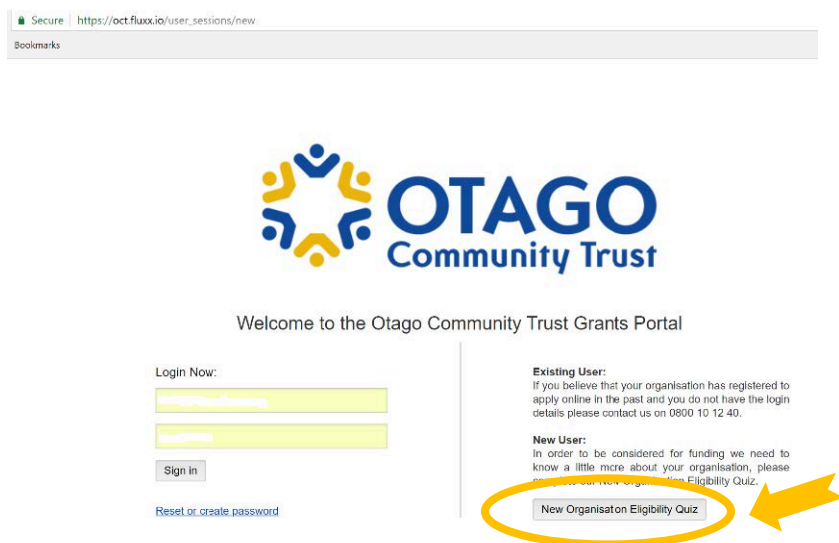
New User

If your organisation has never applied to Otago Community Trust before, first ensure that your organisation is eligible for a grant from the Trust. Our website has clear information on [Who we Fund](#), [What we Fund](#), [How we Fund](#) and [What we do not generally fund](#).

In order to be considered for funding we need to know a little more about your organisation; please complete our New Organisation Eligibility Quiz. If you are eligible you will be taken to our Registration Form. Please complete all the questions and submit your request.


It is important to note that there is no save option at this stage of the registration process you need to fully complete this step.

Your New User log-in details will be emailed to you.



Secure | https://oct.fluxio.io/user_sessions/new

Bookmarks



Welcome to the Otago Community Trust Grants Portal


Login Now:

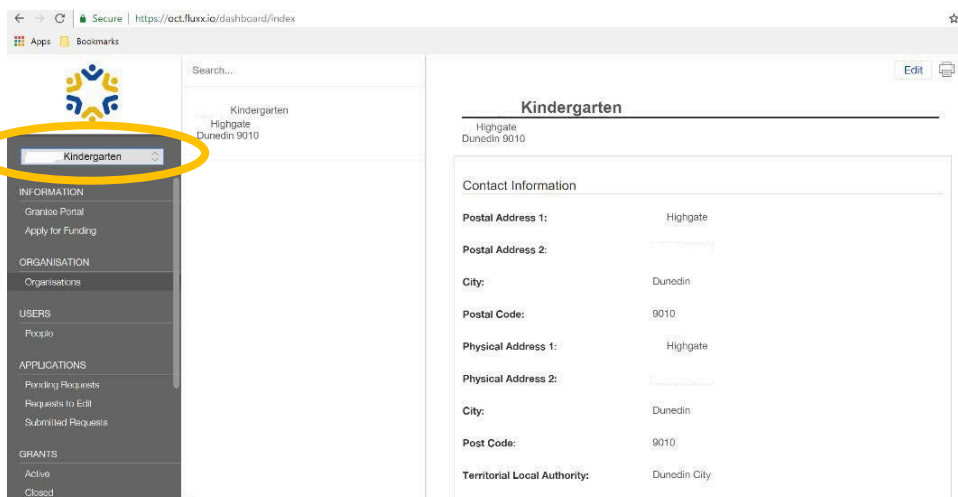
[Reset or create password](#)

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[New Organisation Eligibility Quiz](#)

4. Once you have your login details, you can login to the Grants Portal. Upon logging-in, you will see the organisation's name in the top left-hand side. If you are associated with more than one organisation you will need to select the organisation you wish to submit a grant for – click on the small downward arrow  to view all organisations.



Secure | <https://oct.fluxio.io/dashboard/index>

Apps | Bookmarks



Search...

Kindergarten
Highgate
Dunedin 9010

INFORMATION
Grants Portal
Apply for Funding

ORGANISATION
Organisations

USERS
People

APPLICATIONS
Pending Requests
Requests to Edit
Submitted Requests

GRANTS
Active
Closed

Kindergarten
Highgate
Dunedin 9010

Contact Information

Postal Address 1: Highgate

Postal Address 2:

City: Dunedin

Postal Code: 9010

Physical Address 1: Highgate

Physical Address 2:

City: Dunedin

Post Code: 9010

Territorial Local Authority: Dunedin City

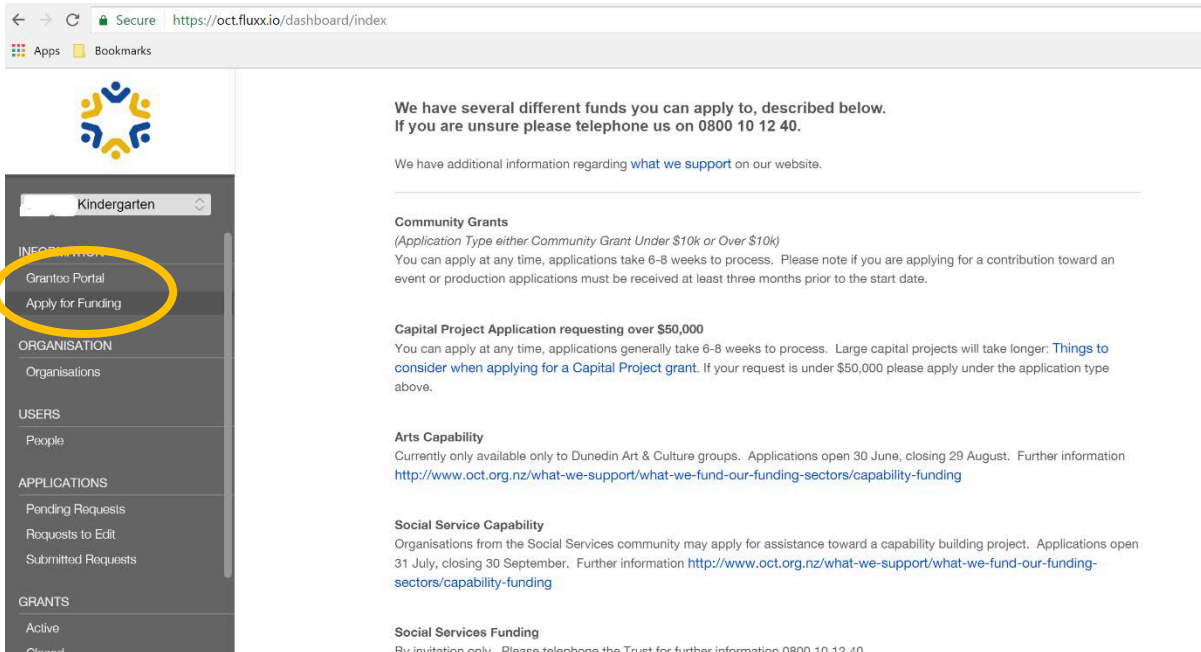
5. This is where you can update your own information under 'People' and your organisation details under 'Organisation'.

Note: You cannot remove users from the people card, however you can update phone numbers and email details here. In the Organisation card you can assign the correct 'Primary Contact'.

The screenshot shows the Octopus Fluxx dashboard at the URL <https://oct.fluxx.io/dashboard/index>. The left sidebar contains a menu with sections: INFORMATION (Grantco Portal, Apply for Funding), ORGANISATION (Organisations), USERS (People), APPLICATIONS (Pending Requests, Requests to Edit, Submitted Requests), and GRANTS (Active, Closed). The 'People' option under the 'USERS' section is highlighted with a yellow circle and an arrow. The main content area displays a card for 'Melanie McAtamney' with email 'mcatamney@gmail.com'. Below the card is a 'Contact Information' form with fields for Title, First Name (Melanie), Last Name (McAtamney), Email (mcatamney@gmail.com), Day Time Phone (02147171), Mobile Phone (02147171), and Primary Organisation (Kindergarten). An 'Edit' button and a print icon are located at the top right of the contact information section, both circled in yellow with an arrow pointing to them.

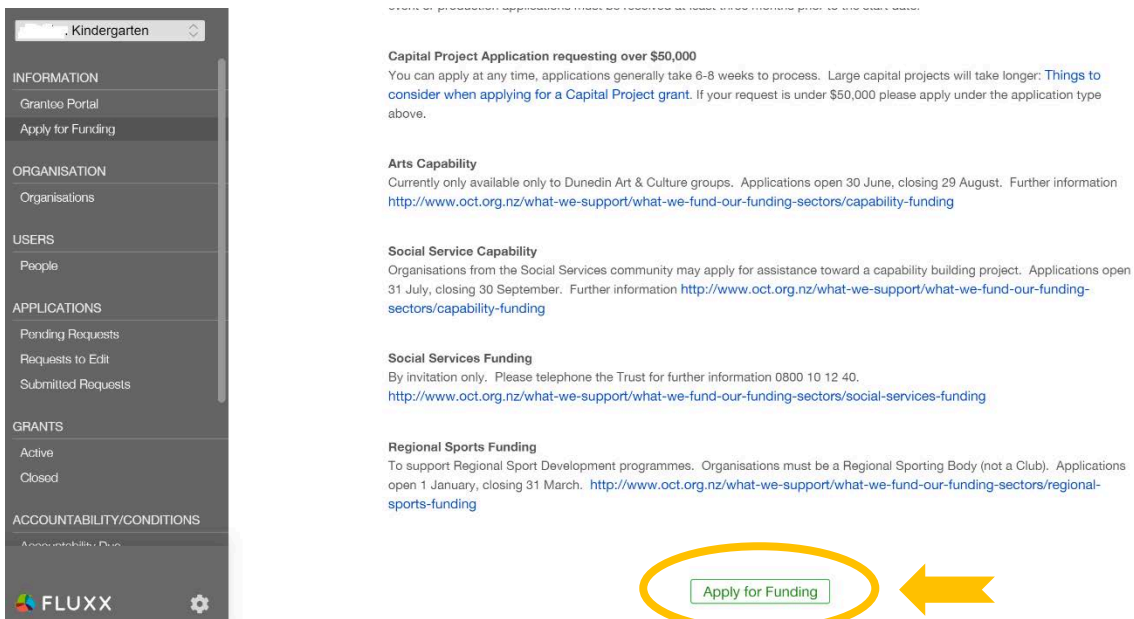
Apply for Funding

1. Down the left hand side in the grey panel, click on Apply for Funding.



The screenshot shows the OCT Fluxx dashboard. On the left, a grey sidebar contains a menu with categories: INFORMATION, ORGANISATION, USERS, APPLICATIONS, GRANTS, and ACCOUNTABILITY/CONDITIONS. Under INFORMATION, the 'Apply for Funding' option is highlighted with a yellow circle and a yellow arrow points to it. The main content area displays information about various funding opportunities, including Community Grants, Capital Project Application, Arts Capability, Social Service Capability, and Social Services Funding.

2. There are various application types that can be selected. After reading and confirming the type of application that best fits your project, scroll to the bottom of the page and click on 'Apply for Funding' button.



The screenshot shows the same OCT Fluxx dashboard, but scrolled down to the bottom. The 'Apply for Funding' button is now visible at the bottom of the page, highlighted with a yellow circle and a yellow arrow points to it. The sidebar menu remains visible on the left.

3. Select your Application Type and answer the questions requested, remembering to save regularly so that you can come back to it at a later date if need be.

If you have started an application but not completed it, you can find that in 'Pending Requests' under the Applications tab.



Please Note: The portal does not autosave, you must click the [Save] button to ensure your data will not be lost, click [Edit] to continue with your application.

▼ Table of Contents

- Organisation Information
- Application Type
- Project Description
- Project Finances
- Additional Project Information
- Organisation Finances
- Applicants Declaration
- Supporting Documents

▼ Organisation Information

Organization:

Location:

Primary Contact: [Add New](#)

Primary Signatory: [Add New](#)

Application Type:

Please select an Application Type

- Arts Capability
- Social Services Capability
- Social Services
- Regional Sports
- Community Donation Under \$10k
- Community Donation Over \$10k
- Capital Projects



Cancel [Save](#)

Application Type

Please select an Application Type:

Project Description

Project Title:

Project description:

Location where your project will be delivered:

Expected project start date:

Expected project completion date:

Which sector does your project fit?:

Tell us why you have chosen this sector:



Search...

Kindergarten
Community Donation Under \$10k
R-1909-18094
Amount Requested:
Status: Draft
Board meeting:

Kindergarten

INFORMATION

- Grantee Portal
- Apply for Funding

ORGANISATION

- Organisations

USERS

- Pending Requests

APPLICATIONS

- Pending Requests
- Requests to Edit
- Start new requests

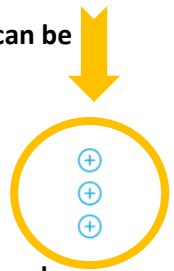
4. At the end of the application you will need to provide 'Supporting Documents' – these can be uploaded by clicking on the '+' button.

Please upload the following documents in support of your application:

Pre-printed bank deposit slip or bank verified account details.

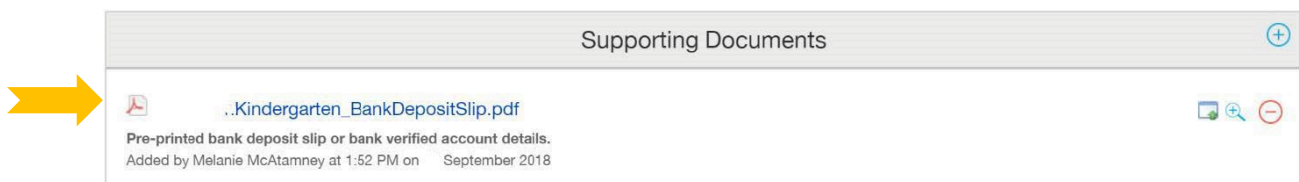
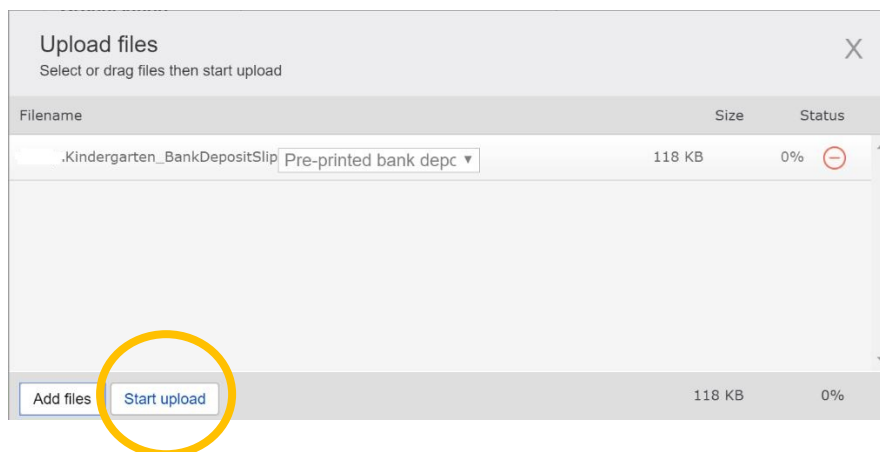
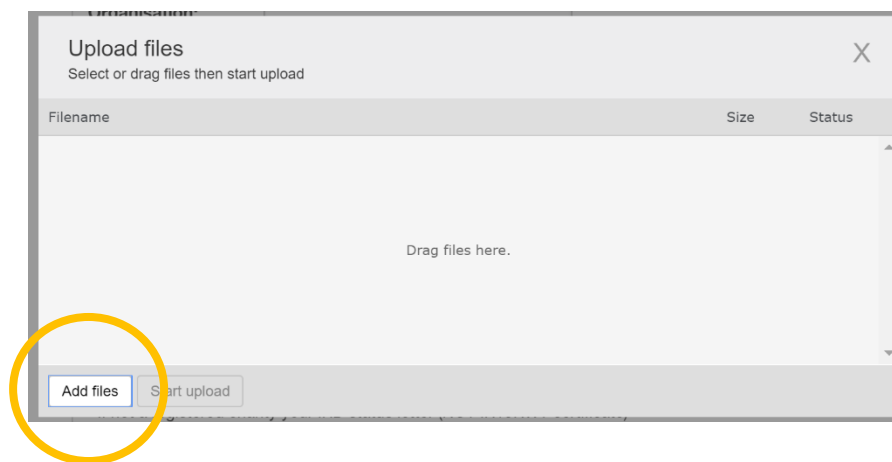
Most recent Annual Financial Statements incld the audit or review report, these must not be more than 18 mths old

Most recent bank statement for all bank accounts held, including investments




At the very minimum the Trust will require the following, so you should have these saved and ready to upload:

- 1. Pre-printed bank deposit slip or bank verified account details.**
- 2. Most recent Annual Financial Statements including the audit or review report, these must not be more than 18 months old**
- 3. Most recent bank statement for all bank accounts held, including investments**



5. Additional Supporting Documents – Some applications like Capital Project will require additional information. Select from the drop-down list what the uploaded document is so that the portal recognises that you have uploaded the correct documents.

Supporting Documents		
		

Upload files

Select or drag files then start upload

Filename	Size	Status
Drag files here.		

Add files

Start upload

Upload files

Select or drag files then start upload

Filename	Size	Status
NuMat Kindergarten2018.pdf	2 MB	0%

Add files

Start upload

- Letters of support and/or other additional information, if applicable

- Your annual operating budget

- If the document type isn't listed

To upload your document:

Quotes and estimates

Application Declined Letter

Application Summary

Conditional Approval Letter

Detailed budget showing all income and expenses related to your project/programme

If not a registered charity your IRD status letter (NOT IR15RWT certificate)

Letters of support and/or other additional information, if applicable

Most recent Annual Financial Statements incl the audit or review report, these must not be more than 18 mths old

Most recent bank statement for all bank accounts held, including investments

Other items

Pre-printed bank deposit slip or bank verified account details.

Quotes and estimates related to your project

The audit or review report on your annual financial statements

Unconditional Approval Letter

Your Business and/or Strategic Plan

6. When you have completed the application form, click on Save – a pop up will appear ‘Grant request was successfully updated’. Then you can click Submit.

▼ Applicants Declaration

In making this application we declare that:

- We are duly authorised to make this application, including this declaration, on behalf of our organisation;
- To the best of our knowledge, the information provided in this application is true, correct and complete;
- We authorise Otago Community Trust to retain all information provided in this application and to use and disclose that information, including any photographs, as required by the Otago Community Trust for any purpose, including the publication of successful grants;
- We warrant that any photograph provided as part of our application complies with all relevant laws including the Copyright Act 1994 and the Privacy Act 1993;
- Any donation received from Otago Community Trust will be used solely for the purpose specified in our application or as directed by the Otago Community Trust. Upon request copies of invoices, receipts and bank statements will be provided to the Otago Community Trust after the donation has been applied towards the purpose. Any unspent funds will immediately be returned to the Otago Community Trust;
- We will be accountable for any donation made and we will comply and assist with any reasonable request for information and documentation from Otago Community Trust to monitor performance and accountability;
- We authorise Otago Community Trust to undertake audits regarding this application;
- We declare that our organisation has complied with our own Rules/Trust Deed/Constitution and relevant regulations and legislation, including those required local authorities and central government.

Privacy Act 1993 Authorisation

This authorisation relates to information that Otago Community Trust collects and may hold about your organisation now and in the future in relation to this application.

This application will contain information about individuals and we are required to handle that information in accordance with the Privacy Act 1993. Accordingly, the Trust confirms that:

- Information is being collected in order to assist the Trust in processing the application.
- This information will be disclosed to other people to the extent considered necessary to assess the merits of your application and to publicise your application, if successful.
- You are not obliged by law to provide this, but failure to do so may mean that the Trust not able to process your application.
- You have the right to access and correct any personal information supplied.

Otago Community Trust's Privacy Policy can be found at this address:

Cancel Save

Financial Details
Project Information
Financials
Declaration
Documents

Grant request was successfully updated.

▼ Applicants Declaration

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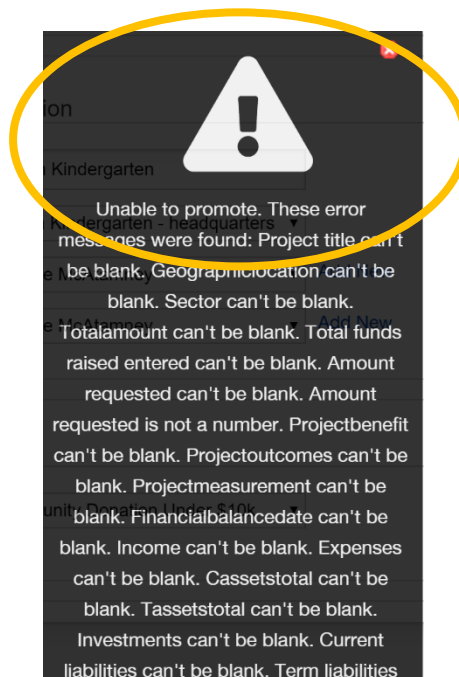
Submit

7. After you have hit Submit a pop up will appear ‘Note for Submit’ you can either add a note or simply click ok.

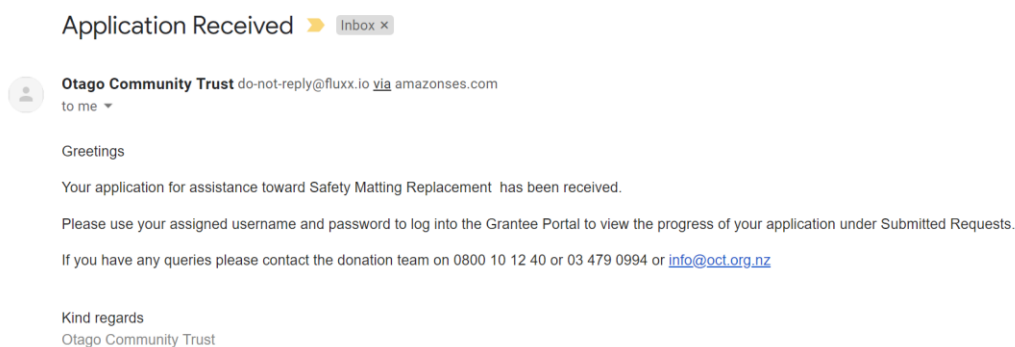
Note for Submit X

Cancel OK

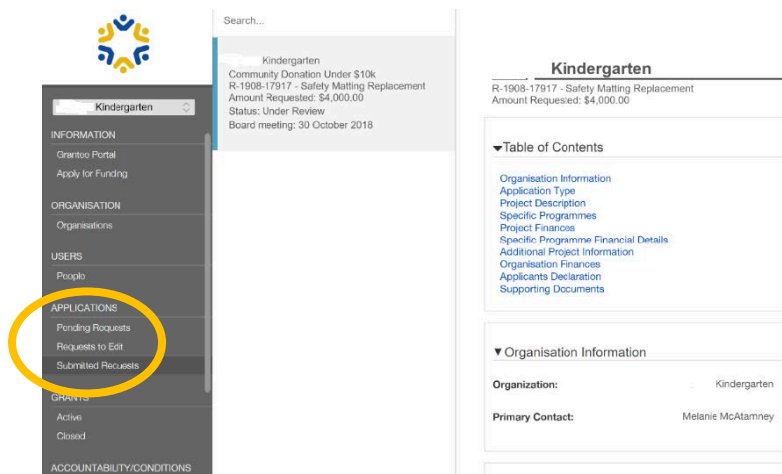
8. If there is missing information in the application form, it will not submit and move into the OCT portal. Any errors or missing information will appear in red on the application form.



9. If the application form has been submitted correctly you will receive no further pop up errors and you will receive an email from Otago Community Trust acknowledging that your application has been received.



10. The application will now move into the Submitted Requests section of the portal. Here you can view the status of your application and the board meeting it has been allocated to for a decision.



The screenshot displays the Kindergarten application portal interface. On the left is a dark sidebar with a logo at the top and a search bar. The sidebar menu includes sections: INFORMATION (Grantee Portal, Apply for Funding), ORGANISATION (Organisations), USERS (People), APPLICATIONS (Pending Requests, Requests to Edit, Submitted Requests - highlighted with a yellow circle), GRANTS (Active, Closed), and ACCOUNTABILITY/CONDITIONS. The main content area has a search bar and a header for 'Kindergarten' with details: 'Community Donation Under \$10k', 'R-1908-17917 - Safety Matting Replacement', 'Amount Requested: \$4,000.00', 'Status: Under Review', and 'Board meeting: 30 October 2018'. Below this is a 'Table of Contents' with links: Organisation Information, Application Type, Project Description, Specific Programmes, Project Finances, Specific Programme Financial Details, Additional Project Information, Organisation Finances, Applicants Declaration, and Supporting Documents. The 'Organisation Information' section is expanded, showing 'Organization: Kindergarten' and 'Primary Contact: Melanie McAtamney'.