



HALO IGX System Guide - Fiduciary APR

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Users will use the following link to access the [MSHDA Grants System](#) in IGX.

Annual Profile Review (APR)

Overview of the Fiduciary APR User Guide

Welcome to the Fiduciary APR User Guide. This document provides detailed instructions for initiating, completing, and submitting your Annual Profile Review (APR) in IGX. The APR process pulls critical data from your Organization's Information Pages, including the Organization Profile, Required Documents, Organization Members, and Legislative Information pages. Therefore, it is essential to ensure these pages are up-to-date and error-free before beginning the APR process. Each section in this guide is designed to help you navigate the various stages of the APR process efficiently.

Should you need further assistance or have any questions about the APR process in IGX, please contact your assigned grant specialist or MSHDA-ESGHelp@michigan.gov.

Initiating an APR

To initiate an APR, the Authorized Official or Agency Administrator must log into the IGX system. After logging in, the Dashboard will be displayed. Navigate to "My Opportunities" to begin a new APR. Upon selecting the blue APR hyperlink from "My Opportunities," a confirmation pop-up will appear to verify the APR you are about to start. Confirm that the correct APR is displayed and click **[Proceed]** to continue.

Important Note: Sometimes the blue APR hyperlink may display a different year than the one in which you initiated it. For example, the hyperlink might say 2022, but if you initiated the APR in 2024, your APR number will still reflect the 2024 initiation year. Always verify the APR number to ensure it corresponds with the correct year of initiation.

To access an existing APR or to check the status of a submitted APR, please refer to the "[Returning to the APR](#)" section of this guide. Selecting the APR under "My Opportunities" when an APR is already in progress will initiate a new APR.

The screenshot displays the MSHDA Grants System Dashboard. The header includes the MSHDA logo, 'DEMO-UAT', and 'MSHDA Grants System'. The user is logged in as 'Randy AuthorizedOfficial'. The dashboard is divided into several sections:

- Dashboard:** The main heading.
- Instructions:** A list of instructions for using the dashboard.
- My Tasks:** A table listing tasks with columns for Name, Document Type, Organization, Status, Status Date, and Due Date.
- My Opportunities:** A table listing opportunities with columns for Name, Provider, Availability, and Description.
- Announcements:** A section for displaying announcements.

Name	Document Type	Organization	Status	Status Date	Due Date
ESG-APP-2024-1735-28	ESG Application 2024	Randy's Testing Organization	Application in Progress	9/4/2024 7:44:59 AM	
HML-2024-1735-RHP	HALO Recovery Housing Investment Program	Randy's Testing Organization	Amendment Request in Process	8/30/2024 11:10:15 AM	
HML-2023-1735-ESF-11	HALO ESG FSR 2023	Randy's Testing	In Progress	8/16/2024 3:17:48 PM	

Name	Provider	Availability	Description
Annual Profile Review 2022	MSHDA	12/9/2021 12:00:00 AM - Open Ended	
Collaborative Grant Application	MSHDA	7/15/2024 12:00:00 AM - Open Ended	
ESG Application 2023	MSHDA	4/17/2023 12:00:00 AM - Open Ended	

Navigating Within the APR

Upon accessing the APR, you'll find a navigation menu on the left-hand side that allows you to move through the various required forms needed to submit your APR. The icons next to each form indicate their status:

- A **check mark** indicates a completed form.
- An **exclamation mark** identifies forms with errors needing corrections.
- An **empty square** signals forms that have not been saved.

Each form includes a save button located in the top right-hand corner. It's important to note that, except for the Document Landing Page, all other applicable forms within the APR are equipped with a save button.

The screenshot displays the MSHDA Grants System interface. The header features the MSHDA logo (Michigan State Housing Development Authority) and the text 'DEMO-UAT' and 'MSHDA Grants System'. The navigation menu on the left is highlighted with a red box and includes sections for 'Forms', 'Annual Forms', 'Status Options', 'Related Documents', and 'Tools'. The main content area is titled 'Document Landing Page' and contains 'Instructions' and a table of document details. A red arrow points to a 'New Note' button in the top right corner.

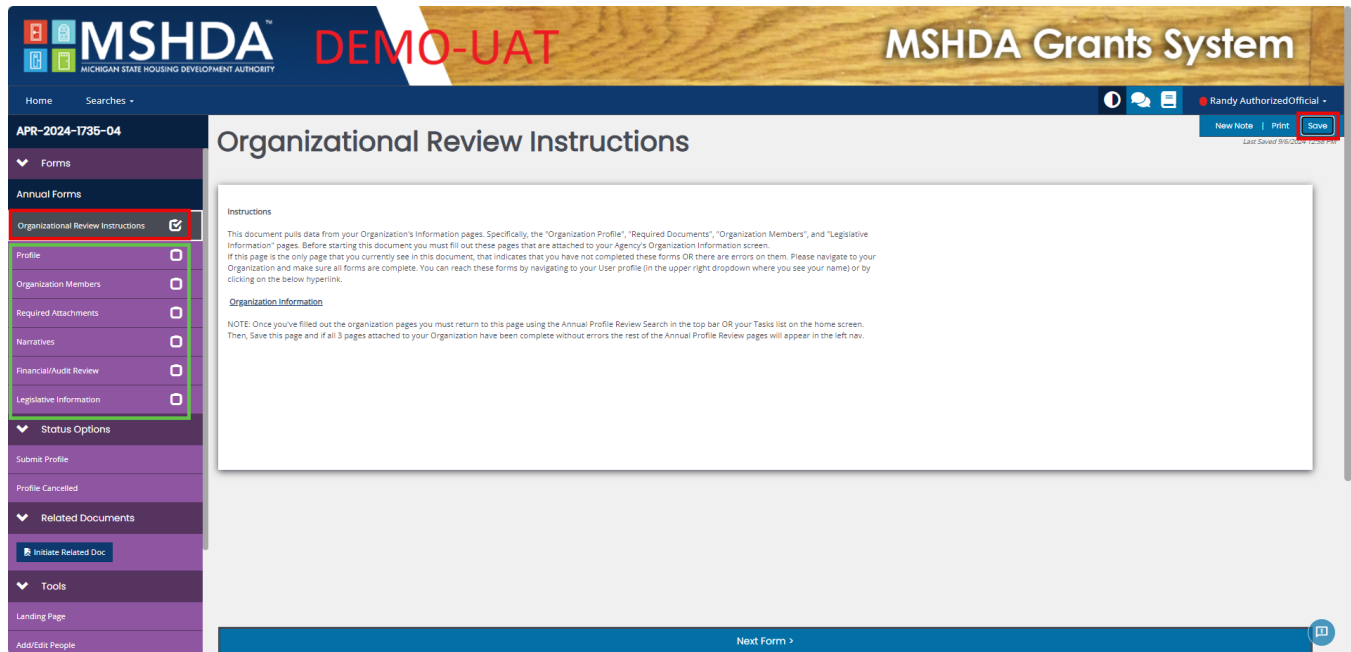
Template	Instance	Process
Annual Profile Review	Annual Profile Review 2022	Annual Profile Review
Document Name	Document Status	
APR-2024-1735-04	Profile in Progress	
Organization	Your Role	Period Date
Randy's Testing Organization	Authorized Official	12/6/2021 12:00:00 AM

Completing the APR

To complete the APR, begin by clicking **[Organizational Review Instructions]**. To complete this form, read the instructions carefully, and then click **[Save]** in the top right-hand corner.

If the only page visible in your APR is the Organizational Review Instructions, this indicates that the required data from your Organization's Information Pages is incomplete or contains errors. Once you save this page, the remaining APR forms should become visible.

Once the additional forms are visible in the left-hand menu, proceed by completing each form as instructed in this guide. If the forms are not visible after saving, follow the steps below to update your organization's information and unlock the additional APR forms.



The screenshot shows the MSHDA Grants System interface. The header includes the MSHDA logo, 'DEMO-UAT', and 'MSHDA Grants System'. The user is logged in as 'Randy AuthorizedOfficial'. The main content area is titled 'Organizational Review Instructions' and contains the following text:

Instructions

This document pulls data from your Organization's Information pages. Specifically, the "Organization Profile", "Required Documents", "Organization Members", and "Legislative Information" pages. Before starting this document you must fill out these pages that are attached to your Agency's Organization Information screen. If this page is the only page that you currently see in this document, that indicates that you have not completed these forms OR there are errors on them. Please navigate to your Organization and make sure all forms are complete. You can reach these forms by navigating to your User profile (in the upper right dropdown where you see your name) or by clicking on the below hyperlink.

[Organization Information](#)

NOTE: Once you've filled out the organization pages you must return to this page using the Annual Profile Review Search in the top bar OR your Tasks list on the home screen. Then, Save this page and if all 3 pages attached to your Organization have been complete without errors the rest of the Annual Profile Review pages will appear in the left nav.

The left-hand menu is visible, showing various forms and options. The 'Save' button is highlighted in the top right corner.

Updating Organization Information to Unlock Additional Forms:

1. Access Your Organization's Information Pages:
 - Log into IGX and navigate to your Profile to verify and update your Organization's Information Pages by clicking **[your name]** and **[Profile]** in the top right-hand corner:
 - Organization Profile
 - Required Documents
 - Organization Members
 - Legislative Information
2. Update and Save:
 - Ensure that each of these pages is complete and error-free. If any errors are present, correct them and click **[Save]** on each page.
3. Return to the APR:
 - Once all the Organization's Information Pages are updated, return to the APR by using either the My Tasks or Search menu options. When using the Search menu, click **[Searches]** and then **[Annual Profile Review]**. Enter your organization's name under "Organization", and then click **[Search]**. Select the APR number to access your APR.
4. Confirm Forms are Visible and Proceed:
 - After saving the Organizational Review Instructions page again, the additional forms should now appear in the left-hand menu. If they are still not visible, verify that no errors remain in the Organization's Information Pages. If they are visible, proceed by completing each form.

Completing the Additional APR Forms

Once the additional forms have become visible, proceed to complete them, starting with the Profile form. Below is a breakdown of each form and the steps required to complete them.

Profile:

To begin completing the Profile form, click **[Profile]** in the left-hand menu. This form auto-populates with data from your Organization's Information Pages. Review the information for accuracy. If any changes need to be made, click on the **[Organization Information]** link to return to your Organization Information Pages and update the necessary details. Once you have confirmed the information is correct, complete the rest of the form, ensuring that all required fields and questions are addressed. After completing the form, click **[Save]** in the top right-hand corner.

MSHDA DEMO-UAT MSHDA Grants System

Home Searches - Randy AuthorizedOfficial - New Note | Print | Save

APR-2024-1735-04

Forms

Annual Forms

- Organizational Review Instructions
- Profile**
- Organization Members
- Required Attachments
- Narratives
- Financial/Audit Review
- Legislative Information

Status Options

- Submit Profile
- Profile Cancelled

Related Documents

- Initiate Related Doc

Tools

- Landing Page
- Add/Edit People

Profile

Instructions:
The below information in sections **Organization Type**, **Organization Contact Info**, **Annual Questions**, and **Additional Information** is auto-populated from the Profile page underneath your Organization's Organization Information page. The Organization Information page can be found here: [Organization Information](#)

NOTE: This will navigate you away from your Annual Profile Review document. To return to your Annual Plan Review you can use the search in the top bar OR your tasks list on the home screen.

Organization Type

- Non-Governmental

Organization Contact Info

- Executive Director/Highest Elected Official**
Randy AuthorizedOfficial

Phone	Email Address
(123) 456-7890	Horstman@michigan.gov

Address	City	State	Zip Code
123 Test Lane	Test	Michigan	12345

- Contact Person**
Randy AuthorizedOfficial

< Previous Form Next Form >

Organization Members:

To complete the Organization Members form, click **[Organization Members]** in the left-hand menu. This form displays the list of members associated with your organization who are currently listed as active in the IGX system in your Organization's Information Pages. Review the list to ensure that each member's role and contact information are correct. If any changes need to be made, click on the **[Organization Information]** link to return to your Organization's Information Pages and update the necessary details. Once the list is accurate, check the box certifying that the Organization Members list is correct. After confirming the information, click **[Save]** in the top right-hand corner.

MSHDA DEMO-UAT MSHDA Grants System

Home Searches Randy AuthorizedOfficial

APR-2024-1735-04

Forms

Annual Forms

- Organizational Review Instructions
- Profile
- Organization Members**
- Required Attachments
- Narratives
- Financial/Audit Review
- Legislative Information

Status Options

- Submit Profile
- Profile Cancelled

Related Documents

- Initiate Related Doc

Tools

- Landing Page
- Add/Edit People

Organization Members

1. Name: Randy AuthorizedOfficial
Role: Authorized Official
Date Active - Date Inactive: 12/07/2021 -

2. Name: Randy AgencyAdministrator
Role: Agency Administrator
Date Active - Date Inactive: 12/07/2021 -

The above list of Organization Members is populated from the Organization's Member page underneath the Organization Information page. The Organization Information page can be found here:

[Organization Information](#)

NOTE: This will navigate you away from your Annual Profile Review document. To return to your Annual Plan Review you can use the search in the top bar OR your tasks list on the home screen.

Certification

Certify that the above list of Organization Members is accurate.

The Freedom of Information Act (FOIA) is mandated by 1976 PA 442; MCL 15.231 et seq. and applies to the Michigan State Housing Development Authority (Authority). Any information provided or uploaded may, in the sole discretion of the Authority, be released in response to a FOIA request.

< Previous Form Next Form >

Required Attachments:

To complete the Required Attachments form, click **[Required Attachments]** in the left-hand menu. This form auto-populates with the attachments listed in your Organization's Information Pages. Review each attachment to ensure that it is up to date. If an attachment is current, select Yes. If any attachment is not up to date, click on the **[Organization Information]** link to return to your Organization's Information Pages and upload the updated file. After verifying all attachments are current and accurately reflected, click **[Save]** in the top right-hand corner.

MSHDA DEMO-UAT MSHDA Grants System

Home Searches - Randy AuthorizedOfficial - New Note | Print | Save

APR-2024-1735-04

Forms

Annual Forms

Organizational Review Instructions

Profile

Organization Members

Required Attachments

Narratives

Financial/Audit Review

Legislative Information

Status Options

Submit Profile

Profile Cancelled

Related Documents

Initiate Related Doc

Tools

Landing Page

Add/Edit People

Required Attachments

Instructions: The attachments below are auto-populated from the Attachments page underneath your Organization's Organization Information page. The Organization Information page can be found here: [Organization Information](#)

NOTE: This will navigate you away from your Annual Profile Review document. To return to your Annual Plan Review you can use the search in the top bar OR your tasks list on the home screen.

1. Organizational Mission Statement

Current File: [JGV Test Document 2.docx](#) Date Uploaded: Jan 10 2022 7:24PM

Is the above attachment up to date?

Yes No

2. Board of Directors

Current File: [JGV Test Document 2.docx](#) Date Uploaded: Jan 10 2022 7:24PM

Is the above attachment up to date?

Yes No

3. Organizational Chart

Current File: [JGV Test Document 2.docx](#) Date Uploaded: Jan 10 2022 7:24PM

Is the above attachment up to date?

Yes No

< Previous Form Next Form >

Narratives:

To complete the Narratives form, click **[Narratives]** in the left-hand menu. This form asks questions about your organization, including details about your target population, service area, staffing, and local services. Provide accurate and thorough responses for each question. Since this form does not auto-populate, ensure all required fields are filled in before saving. After completing the form, click **[Save]** in the top right-hand corner.

MSHDA DEMO-UAT MSHDA Grants System

Home Searches - Randy AuthorizedOfficial - New Note | Print | Save

APR-2024-1735-04

Forms

Annual Forms

Organizational Review Instructions

Profile

Organization Members

Required Attachments

Narratives

Financial/Audit Review

Legislative Information

Status Options

Submit Profile

Profile Cancelled

Related Documents

Initiate Related Doc

Tools

Landing Page

Add/Edit People

Narratives

Instructions:

All organizations are required to complete questions 1-6.

1. Briefly describe your Organization's target or service area.

0 of 1000

2. The Organization's targeted population (check all that apply):

Low-income

Very Low-income

Homeless

Homeowners

Homebuyers

Renters

Families

Single Person Household

Veterans

Other (Specify):

< Previous Form Next Form >

Financial/Audit Review:

To complete the Financial/Audit Review form, click **[Financial/Audit Review]** in the left-hand menu. This form requests detailed information about your organization's financial health, including questions about annual audits, auditors, annual financial statements, single audits, and the organization's budget. Ensure that all financial information is accurate and up to date. After providing the necessary details, click **[Save]** in the top right-hand corner.

The screenshot shows the MSHDA Grants System interface. The top navigation bar includes the MSHDA logo, "DEMO-UAT", and "MSHDA Grants System". The user is logged in as "Randy AuthorizedOfficial". The left sidebar menu is expanded to show "Financial/Audit Review" with a red box around it. The main content area displays the "Annual Audit" form with the following questions:

1. Do you have an annual audit?
 Yes No
3. When does your organization's fiscal year start and end for current Financials submitted?
Start Date: [MM/DD/YYYY] End Date: [MM/DD/YYYY]
4. What is your Organization's last fiscal year end date for any required Single Audits?
Last End Date: [MM/DD/YYYY] Last End Date N/A:
5. What level of financial review does your organization obtain from an independent source? Select one from the following options:
 Audited Financial Statements
 Reviewed Financial Statement

A note below question 5 states: "Note: MSHDA is required to verify that its grantees have met the audit requirements and are in compliance with state and federal regulations including the Uniform Guidance at 2 CFR Part 200. Your agency will be required to upload your organization's most recent independent audit and MSHDA's Single Audit Certification Form. Audits or Certified Reviews of Financial Statements must be submitted in their entirety and should reflect all financial activity at least through the last fiscal year end date to be considered current. Agencies that are entirely new and have not completed a full fiscal year are exempt. Grantees are responsible for determining their own required level of audit compliance, which may change depending upon the scope of the grantee's financial activity and may be subject to verification by MSHDA."

At the bottom of the form, there are navigation buttons: "< Previous Form" and "Next Form >". A "Save" button is located in the top right corner of the form area.

Legislative Information:

To complete the Legislative Information form, click **[Legislative Information]** in the left-hand menu. This form auto-populates data from your Organization's Information Pages, including your organization's US Congressional Districts, State Senate Districts, and State House of Representative Districts. Review the information for accuracy. If changes are needed, navigate to your Organization's Information Pages by clicking **[your name]** in the top right-hand corner, clicking **[Profile]**, and making the necessary updates there. Once you have confirmed that all data is up to date and accurate, check the certification box at the bottom of the page and click **[Save]** in the top right-hand corner.

The screenshot shows the MSHDA Grants System interface. The header includes the MSHDA logo, 'DEMO-UAT', and 'MSHDA Grants System'. The user is logged in as 'Randy AuthorizedOfficial'. The sidebar menu on the left has 'Legislative Information' selected. The main content area is titled 'Legislative Information' and contains the following data:

Legislative Information:

U.S. Congressional District Numbers
Congressional District - 1, Congressional District - 5

U.S. Congressional Representatives
District #Congressional District - 1: Jack Bergman,
District #Congressional District - 5: Daniel Kildee

State Senate District Numbers
Senate District - 2, Senate District - 3

State Senators
District #Senate District - 2: Adam Holler,
District #Senate District - 3: Sylvia Santana

State House of Representatives District Numbers
State Representative District - 4, State Representative District - 6

State Representatives
District #State Representative District - 4: Abraham Ajayash,
District #State Representative District - 6: Tyrone Carter

At the bottom of the form, there is a '< Previous Form' button.

Submitting the APR

Before submitting the APR, the Authorized Official should perform a final review of all completed forms to ensure they are accurate and error-free. Once the review is complete, click **[Submit Profile]** under Status Options located in the left-hand menu. Upon submission, MSHDA will review the APR to ensure that all required information is complete and compliant with program requirements. If any issues or discrepancies are identified during the review process, the APR will be returned for necessary modifications and corrections.

MSHDA DEMO-UAT MSHDA Grants System

Home Searches - Randy AuthorizedOfficial - New Note | Print | Save Last Saved 9/6/2024 10:46 PM

APR-2024-1735-04

Forms

Annual Forms

- Organizational Review Instructions
- Profile
- Organization Members
- Required Attachments
- Narratives
- Financial/Audit Review
- Legislative Information**

Status Options

- Submit Profile**
- Profile Cancelled

Related Documents

- Initiate Related Doc

Tools

- Landing Page
- Add/Edit People

Legislative Information

Legislative Information:

U.S. Congressional District Numbers
Congressional District - 1, Congressional District - 5

U.S. Congressional Representatives
District #Congressional District - 1: Jack Bergman,
District #Congressional District - 5: Daniel Klodee

State Senate District Numbers
Senate District - 2, Senate District - 3

State Senators
District #Senate District - 2: Adam Haller,
District #Senate District - 3: Sylvia Santana

State House of Representatives District Numbers
State Representative District - 4, State Representative District - 6

State Representatives
District #State Representative District - 4: Abraham Alyash,
District #State Representative District - 6: Tyrone Carter

< Previous Form

Returning to the APR

To return to a previously initiated APR, the Authorized Official or Agency Administrator should log into IGX and navigate to the applicable APR using either the My Tasks or Search menu. When using the Search menu, click **[Searches]** and then **[Annual Profile Review]**. Enter your organization's name under "Organization", and then click **[Search]**. Select the APR number to access your APR.

MSHDA DEMO-UAT MSHDA Grants System

Home Searches - Randy AuthorizedOfficial -

Annual Profile Review Search

Recent Documents

Activities

Search

- Annual Profile Review**
- Agency Bills
- Applications
- Financial Status Reports
- General System Access Requests
- Grants

Number:

Organization:

Type:

Status:

Grant Specialist:

Clear Search

Export to Excel

Drag a column header and drop it here to group by that column

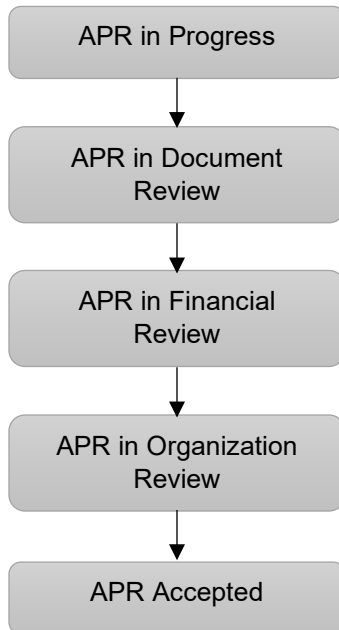
Number	Organization	Type	Status	Status Date	Grant Specialist	County	Date Initiated	Date Last Submitted
APR-2024-1735-04	Randy's Testing Organization	Annual Profile Review 2022	Profile in Progress	09/05/2024		Alpena County	09/05/2024	
APR-2024-1735-03	Randy's Testing Organization	Annual Profile Review 2022	Profile in Progress	04/01/2024		Alpena County	04/01/2024	
APR-2022-1735-01	Randy's Testing Organization	Annual Profile Review 2022	Profile in Financial Review	09/25/2023	Specialist, Randy	Alpena County	01/10/2022	07/24/2023
APR-2022-1735-02	Randy's Testing Organization	Annual Profile Review 2022	Profile in Progress	09/11/2023		Alpena County	09/11/2023	

APR Approval Process Flow

After the APR is submitted, it will first be reviewed by the Grant Specialist for initial compliance. Following that, the APR will be reviewed by the Manager and the Financial Reviewer. Once these reviews are complete, the Grant Specialist will conduct a final review and approve the APR. If any issues or discrepancies are identified during the review process, the APR will be returned for necessary modifications and corrections.

Important Note: In some instances, the APR may also be reviewed by the Financial Manager or MSHDA Compliance as additional steps. These reviews are separate and occur only if needed. However, they are not included in the flowchart below.

APR Approval Process Flowchart:



Frequently Asked Questions (FAQ)

Q: What should I do if my APR is returned for corrections?

A: If your APR is returned, review the feedback provided, make the necessary corrections, and resubmit the APR through the IGX system. Ensure all supporting documents are complete and accurate.

Q: Can an Agency Administrator submit an APR?

A: Only the Authorized Official can submit an APR.

Q: Can I make changes to my APR after submitting it?

A: Once submitted, the APR can only be modified if MSHDA returns it for corrections.

Q: How can I check the status of a submitted APR?

A: To check the status of a submitted APR, log into the IGX system and navigate to your APR using either My Tasks or the Search menu. The status will be indicated next to the APR number link.

Q: Who can I contact for help with the APR process?

A: For assistance with the APR process, please contact your grant specialist or MSHDA-ESGHelp@michigan.gov.