



HALO IGX System Guide - User Access

Table of Contents

User Access.....	2
Overview of the User Access User Guide	2
Creating a New Organization/Authorized Official	2
Managing User Profiles and System Access	4
New Users, Modify User Profiles, or Delete User Access Rights	6
Authorized Official Change	7
Transfer User from One Organization to Another	8
Modify Organization Information.....	9
Other Changes (including Authorized Signer Changes)	10
Submitting a System Access Form.....	11
Frequently Asked Questions (FAQ).....	12

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

User Access

Overview of the User Access User Guide

Welcome to the User Access User Guide. This document provides detailed instructions on managing user access, including creating new user profiles, modifying existing profiles, and updating organizational information in IGX. Each section is designed to help you navigate and manage user access efficiently.

Below are the definitions of key roles within the IGX system:

- **Authorized Official (AO):** The highest-ranking official of the organization, responsible for managing contractual obligations, signing grant agreements, and creating and submitting all system-related documents.
- **Authorized Signer (AS):** Designated by the Authorized Official, the Authorized Signer can initiate and submit grant amendments and financial status reports. This role is specific to individual grants.
- **Agency Administrator (AA):** Capable of editing and creating applications, grant amendments, and financial status reports. However, the Agency Administrator lacks submission privileges and cannot submit these documents.
- **Agency Viewer (AV):** Can view forms, documents, and reports within the IGX system but cannot make edits, save changes, or submit any documents.

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

Creating a New Organization/Authorized Official

To initiate the registration process for a new organization or an Authorized Official, navigate to the "New User? Click Here" button at the bottom of the login screen. This section is intended for individuals who have the authority to manage contractual obligations and sign grant agreements on behalf of their organization. Upon clicking the blue hyperlink, the New Organization/Authorized Official Registration Form will appear.

This form requires detailed information about the organization and the Authorized Official, including

- **Organization Name:** The legal name of the organization.
- **UEI (Unique Entity Identifier):** Acquired from SAM.gov.
- **Request Type:** Choose "New Organization And Agency Authorized Official" to establish both the organization and its Authorized Official in the system. Select "New Agency Authorized Official" if it's just an Authorized Official change.
- **System Type:** Select the appropriate system type based on the grants you intend to apply for, such as "HALO."
- **Effective Date:** Specify when the profile should become active.

All required fields are marked in red and must be completed before submission. After filling out the form, review the information for accuracy, then click **[Register]** to submit your registration request. Typically, the approval process for a new profile will take 2-3 business days.

Important Notes:

1. **Authorized Official Change:** If the organization is already established in IGX and there is an Authorized Official change, but the current Authorized Official is unavailable, unable to submit the request, or no longer with the organization, follow the steps above and select "New Agency Authorized Official" in the Request Type field to allow the new Authorized Official to gain access to the system. If the current Authorized Official is still available and able to make changes, refer to the "[Authorized Official Change](#)" section of this guide for instructions on updating their role using the Grantee System Access Form.

2. **Managing User Profiles:** Once the Authorized Official's registration is approved, additional users can be added using the Grantee System Access Form located under My Opportunities. For further information on managing user profiles, please refer to the "[Managing User Profiles and System Access](#)" section of this guide.

MSHDA
MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

New Organization/Authorized Official Registration

- Only the Authorized Official of an organization can submit this IGX system access form on behalf of their organization.
- The Authorized Official is usually the highest-level leader within the organization and is permitted to enter into a grant agreement with MSHDA and will be the Authorized Official who will provide signature on a work-in-progress agreement.

First Name of Authorized Official
The First Name field is required.

Last Name of Authorized Official
The Last Name field is required.

Title

SAM # (UEI)
This field is required.

Organization Name
(Full Legal Name of your Organization, no abbreviations)
This field is required.

Address
The Address field is required.

City
The City field is required.

Zip Code
The ZIP Code field is required.

Email

Middle Name

Prefix

Suffix

FEIN
This field is required.

Address 2

State
The State field is required.

County
The County field is required.

Phone

Log In

[Login Assistance](#)

[New User? Click Here](#)

Neighborhood Application System Request

Go to the top
© Copyright 2024 State of Michigan

Policies

Managing User Profiles and System Access

To manage user profiles or request access changes, the Authorized Official must submit a Grantee System Access Form. This form allows you to perform various actions, including adding new users, modifying user profiles, changing roles, or deactivating users. Typically, requests are processed within 2-3 business days.

To access the System Access Form, the Authorized Official will log into the IGX system and click **[Grantee System Access]** under My Opportunities. Next, click **[Proceed]** on the pop-up to access the System Access Form.

MSHDA DEMO-UAT MSHDA Grants System

Home Searches Randy AuthorizedOfficial

Dashboard

Instructions:

- Click on an Opportunity Name to start applying for the Opportunity.
- The 'My Tasks' panel will show documents that are currently in process or are in need of attention.

My Tasks [Initiate Related Document](#)

> Filter

My Tasks

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-ESP-11	HALO ESG FSR 2023	Randy's Testine	In Progress	8/16/2024 3:17:48 PM	

My Opportunities

Collaborative Grant Application	MSHDA	7/16/2024 1:00:00 AM - Open Ended
ESG Application 2023	MSHDA	4/17/2023 12:00:00 AM - Open Ended
ESG Application 2024	MSHDA	6/5/2024 12:00:00 AM - Open Ended
Grantee System Access	MSHDA	8/29/2022 12:00:00 AM - 8/31/2030 11:59:00 PM
HEP Application 2023	MSHDA	1/5/2022 12:00:00 AM - Open Ended
HEP Application 2024	MSHDA	4/24/2024 12:00:00 AM - Open Ended
HEP HUD Application 2023	MSHDA	2/16/2022 12:00:00 AM - Open Ended

Announcements

This will take you to the Grantee System Access Form Landing Page. Click **[System Access Form]** on the left-hand menu.

MSHDA DEMO-UAT MSHDA Grants System

Home Searches Randy AuthorizedOfficial

GRANTEE-Request-0077

Forms

System Access Form

Status Options

Submittal Request

Related Documents

[Initiate Related Doc](#)

Tools

Landing Page

Add/Edit People

Status History

Attachment Repository

Modification Summary

Document Validation

Notes

Print Document

Document Messages

Document Landing Page

Instructions:

- View document details.

Template: Grantee System Access
Instance: Grantee System Access
Process: Grantee System Access Request

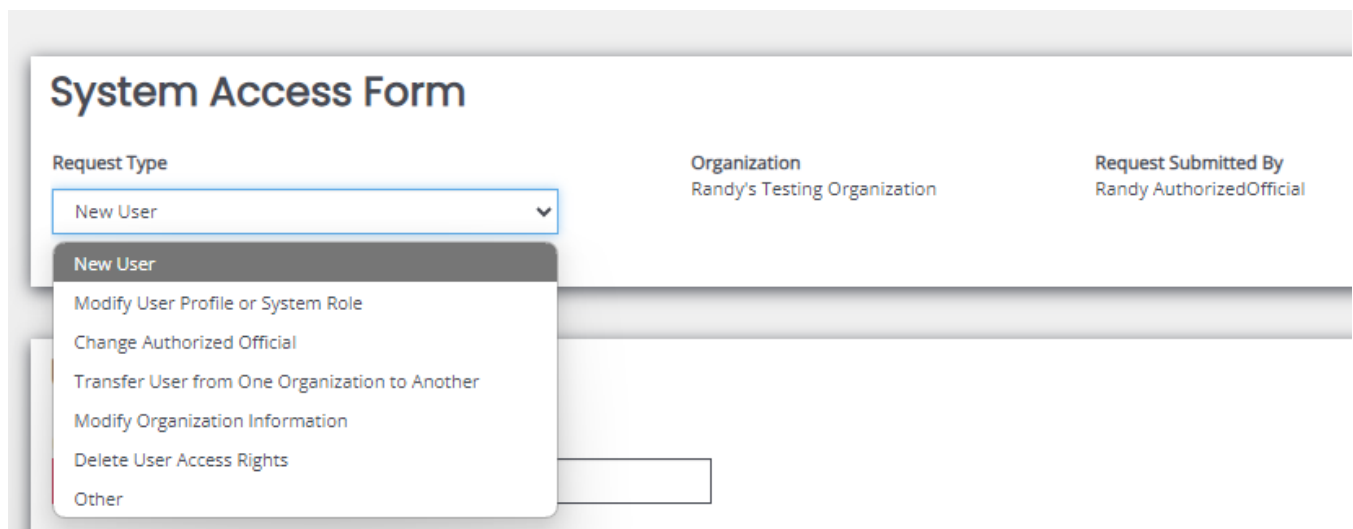
Document Name: GRANTEE-Request-0077
Document Status: System Access Request In Progress

Organization: Randy's Testing Organization
Your Role: Authorized Official

System Access Request In Progress (checked) → In Review → Completed → Denied

You will then see a drop-down menu where you can select the type of request. There are seven options available:

1. **New User:** submits a request to add a new user to the IGX system.
2. **Modify User Profile or System Role:** submits a request to make changes to a current user.
3. **Change Authorized Official:** submits a request to change the current Authorized Official.
4. **Transfer User from One Organization to Another:** submits a request to move a user to a new organization.
5. **Modify Organization Information:** submits a request to update or change the Organization Information.
6. **Delete User Access Rights:** submits a request to make a user inactive.
7. **Other:** if the other options do not apply to your request, submit a request describing in detail what you are trying to accomplish. This is also the option to select if you need to update an Authorized Signer.



The screenshot displays the 'System Access Form' interface. On the left, there is a 'Request Type' dropdown menu currently set to 'New User'. A dropdown menu is open, listing the following options: 'New User', 'Modify User Profile or System Role', 'Change Authorized Official', 'Transfer User from One Organization to Another', 'Modify Organization Information', 'Delete User Access Rights', and 'Other'. To the right of the dropdown, the 'Organization' field is populated with 'Randy's Testing Organization', and the 'Request Submitted By' field is populated with 'Randy AuthorizedOfficial'.

Each of these request types will be explained in more detail in the following sections of this guide.

New Users, Modify User Profiles, or Delete User Access Rights

If you select New User, Modify User Profile or System Role, or Delete User Access Rights in the Request Type drop-down, you will see the User Information section. For the User Access Level drop-down, choose between Agency Administrator and Agency Viewer. An agency can have more than one of either role.

The User Inactive date is only required if you select Delete User Access Rights. Provide the reason for the change in the User Description of Request.

User Information

User First Name

User Last Name

User Email

User Phone

User Fax

User Access Level

User Active Date

User Inactive Date

User Description of request

Authorized Official Change

This process is for situations where the current Authorized Official is still available to make changes to their own account, and the new Authorized Official is already part of the organization in IGX. If you select Change Authorized Official in the Request Type drop-down, you will see the Authorized Official Change section. Choose whether your account should be deactivated. If you are leaving the agency, you should deactivate your account. If you are not deactivating your account, choose a new role for yourself, either as an Agency Administrator or an Agency Viewer. Then, select who should be listed as the new Authorized Official from the drop-down list of your agency's current users. Provide the reason for the change under Describe Request.

Important Note: If the new Authorized Official is not already part of the organization, refer to the "[Creating a New Organization/Authorized Official](#)" section of this guide for the correct process to register them.

Authorized Official Change

For Authorized Official Change, should prior AO be deactivated?

Role to change existing Authorized Official to

Who is the new Authorized Official?

Describe Request

Transfer User from One Organization to Another

If you select Transfer User from One Organization to Another in the Request Type drop-down, you will see the Transfer User from One Organization to Another section. Fill out the User information for the user you want to transfer. Select the Access level you want the user to have at your agency. They can be either an Agency Administrator or an Agency Viewer. Choose an active date and whether the user should be deactivated from the old organization. If they should be deactivated, you will need to choose the deactivation date. Provide the reason for the change under Transfer Description of Request.

Transfer User from One Organization to Another

Transfer First Name

Transfer Last Name

Transfer Email

Transfer Phone

Transfer Fax

Transfer Access Level

Active Date

Deactivate user from old organization?

Deactivate Date

Transfer Description of request

Modify Organization Information

If you select Modify Organization Information in the Request Type drop-down, you will see the Organization Information section. For this section, you will only enter information into the fields that need to be changed. For example, if the agency's name changed but everything else is the same, only enter the new agency name under Agency Name. Provide the reason for the change under Please include a description in writing of the change.

Organization Information

ONLY FILL IN THE FIELDS THAT YOU NEED MODIFIED FOR THE ORGANIZATION

Agency Type

Agency Name

Agency Address

Agency City

Agency Zip

Agency County

Agency Phone

Agency Fax

Federal ID Number

Faith Based

Beginning Month of FY

UEI Number

Please include a description in writing of the change

Other Changes (including Authorized Signer Changes)

If you select Other in the Request Type drop-down, you will see the Other section. Please describe the request in the narrative box. Be specific to ensure your request is processed accurately. If you're making an Authorized Signer change, follow the additional steps outlined below.

Other

Please Describe the request

Updating Authorized Signers:

1. Access Your Grant:
 - Log into IGX and navigate to your current grant.
2. Navigate to Grant Documents
 - Select Grant Documents from the left-hand menu.
3. Select the Appropriate Document:
 - Depending on your agency type, choose the appropriate document:
 - For Non-Profits: Select the Grant Closing Statement.
 - For Local Governments: Select the Authorized Signature Designation Form.
4. Create a New Version:
 - Click the document title to initiate a new version.
 - Complete all required fields.
 - Add new Authorized Signers:
 - For Non-Profits, on the second page of the Grant Closing Statement.
 - For Local Governments, on the first page of the Authorized Signature Designation Form.
5. Upload the Document:
 - After completing the form, upload the updated Grant Closing Statement or Authorized Signature Designation Form to the Miscellaneous Attachments form in IGX under your current grant.
6. Submit the Other Request:
 - Once the document is uploaded, complete the Other section in IGX by providing the necessary details in the narrative box. This step is essential for notifying MSHDA that a change has been requested.
7. Final Steps:
 - After submitting the Other request and uploading the document, MSHDA will review the submission. If you need further assistance or verification, please contact your grant specialist for additional support.

Submitting a System Access Form

Once the System Access Form has been completed with no errors, the Authorized Official can submit it. Click **[Submit Request]** under Status Options located in the left-hand menu. After submission, the request will be reviewed by MSHDA, and you will be notified of any necessary actions or if additional information is required.

The screenshot shows the MSHDA Grants System interface. At the top, the MSHDA logo (Michigan State Housing Development Authority) is on the left, followed by 'DEMO-UAT' in red text, and 'MSHDA Grants System' on the right. Below the header is a navigation bar with 'Home' and 'Searches'. The main content area is titled 'System Access Form' and contains several sections:

- System Access Form**: A summary section with fields for 'Request Type' (New User), 'Organization' (Randy's Testing Organization), and 'Request Submitted By' (Randy AuthorizedOfficial).
- User Information**: A section with fields for 'User First Name' (Test First Name), 'User Last Name' (Test Last Name), 'User Email' (Test Email), 'User Phone' ((111) 311-3111), and 'User Fax'. It also includes a 'User Access Level' dropdown menu set to 'Agency Administrator'.
- User Active/Inactive Dates**: Fields for 'User Active Date' (09/01/2024) and 'User Inactive Date' (MM/DD/YYYY).
- User Description of request**: A text area containing 'Testing User Access Request'.

On the left side, there is a vertical menu with the following items: 'GRANTEE-Request-0077', 'Forms', 'System Access Form', 'Status Options' (with 'Submit Request' highlighted in red), 'Related Documents', 'Tools', 'Landing Page', 'Add/Edit People', 'Status History', 'Attachment Repository', 'Modification Summary', 'Document Validation', 'Notes', 'Print Document', and 'Document Messages'. At the top right of the main content area, there are links for 'New Note', 'Print', and 'Save', along with a user profile for 'Randy AuthorizedOfficial' and a timestamp 'Last Saved: 9/19/2024 9:07 AM'.

Frequently Asked Questions (FAQ)

Q: What should I do if my account is deactivated or locked out?

A: If your account becomes deactivated or locked out after 90 days of inactivity, please contact your grant specialist, who will coordinate with MSHDA IT to restore it.

Important Note: Once MSHDA IT restores your account, you will have until the end of the business day to access IGX, or you will need to request restoration from your grant specialist again.

Q: How do I deactivate a user account within the IGX system?

A: To deactivate a user account, the Authorized Official must submit a System Access Form under My Opportunities within the IGX system. They will provide the necessary details and justification for deactivation, and then the request will be processed accordingly.

Q: Can I reactivate or unlock my own account if it's deactivated or locked out?

A: Users cannot reactivate or unlock their own accounts once they are deactivated or locked out. Assistance must be sought from a grant specialist.

Q: How long does it typically take to restore a user account?

A: The time taken to restore a user account varies depending on the specific circumstances and internal processes. Your grant specialist will work diligently with MSHDA IT to ensure the timely restoration of your account access.

Q: Are there any exceptions to the 90-day deactivation period for user accounts?

A: No, but please contact your grant specialist with any questions or concerns regarding this timeframe.

Q: Can there be two Authorized Officials for one organization?

A: No, each organization can only have one Authorized Official at a time. Please contact your grant specialist if you have any questions or concerns.

Q: What do I do if I have technical issues with the IGX system?

A: If you have any technical issues with the IGX system, please contact your grant specialist or MSHDA-ESGHelp@michigan.gov for assistance.