Agate Software

Partnership Profile User Guide

June 2013

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1. Creating a Partnership Profile

1.a. Login

To access MATT 2.0, enter https://mshda-matt.org/Login2.aspx?APPTHEME=MIMSHDA into the address bar of a web browser. The page looks like the image below.

1.b. View Opportunities

The Home screen is the first screen seen after logging into MATT 2.0. From the Home page, users can initiate a Partnership Profile.

Click the "View Opportunities" button located in the View Available Opportunities section.

1.c. Create Partnership Profile

After clicking on the "View Opportunities" button all available opportunites are displayed. Search for the Partnership Profile Rev022013 and click on the "Create Partnership Profile" button.

Partnership Profile Rev022013 for Christine's Test Org
Offered By:
MIMSHDA

Partnership Profile Availability Dates:
11/02/2012-open ended

Partnership Profile Period:
not set

Partnership Profile Due Date:
not set

Description:

CREATE PARTNERSHIP PROFILE

2. Completing your Partnership Profile

2.a. Partnership Profile Menu

After creating the Partnership Profile, the Partnership Profile Menu is displayed. Click on the "View Forms" button located in the View, Edit and Complete Forms section.

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Partnership Profile Menu

Document Information: PP-1003-00010

▼ Details

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Partnership Profile	Christine's Test Org	Authorized Official	Profile In Progress	N/A - N/A N/A

📄 View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

VIEW FORMS

➡ Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

VIEW STATUS OPTIONS

🔵 Access Management Tools

Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

VIEW MANAGEMENT TOOLS

🔍 Examine Related Items

Select the **View Related Items** button below to view related items such as claims, messages, etc.

VIEW RELATED ITEMS

⬆ Perform Administrative Tasks

Select the **View Administrative Tasks** button below to perform actions such as completing a review, generating a contract, requesting modifications, etc.

VIEW ADMINISTRATIVE TASKS

2.b. Forms Menu

After clicking the "View Forms" button, the Partnership Profile Forms Menu is displayed. This menu includes all forms that need to be completed in order to submit the Partnership Profile for review.

2.b.1   Organization Type Form

Click on the first form, "Organization Type" in the menu and select the appropriate type for your organization. The Organization Type form should be completed first. The values saved in this form will determine which of the other forms are required for the particular organization.

SHOW HELP

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Partnership Profile Menu - Forms

Please complete all required forms below.

Document Information: PP-1003-00010

Details

Forms

Status	Page Name	Note	Created By	Last Modified By
Partnership Profile Forms				
	Organization Type			
	Organization Information			
	Financial Information			
	Narrative			
	Required Attachments			
	Legislative Information			

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The organization types include: Housing Counseling, Non-Profit, Government, Vendor/Contractor and TA Provider. If you do not know your organization type please contact your MSHDA Specialist.

2.b.2   Saving a Form

After selecting your organization type in the Organization Types form click the "Save" button at the top right hand corner of the screen. . The values saved in this form will determine which of the other forms are required for your type of organization.

2.b.3   Form Navigation

2.b.3.a   Navigation Links

After saving the Organization Types form, the Navigation Links will become available at the bottom of the form. Use these navigation links to navigate directly to any form in the menu.

2.b.3.b   Forms Menu breadcrumb

The Forms Menu breadcrumb navigates back to the Partnership Profile Forms Menu. The Forms Menu breadcrumb is always available at the top of all forms.

2.b.4   Forms Menu Features

2.b.4.a   Icons

After you have saved one of the forms, it will display a record of who saved the form, and when. Also, the icon next to the form will change to indicate that it has been saved or if there are any errors on the page.

The icon below shows that the page has been saved.

The icon below shows that there is an error on page.

The icons below show that the forms have not been saved and are editable.

2.b.4.b   Created and Modified

After a form has been saved, the forms menu displays the username and date/time stamp of the user that first saved the form in the Created by column. The Last Modified By column displays the username and date/time stamp of the user that last modified the form.

Navigation Links

Status	Page Name	Note	Created By	Last Modified By
📝	Organization Type		Offical , OPAL 6/5/2013 3:37:45 PM	
📝	Organization Information		Offical , OPAL 6/5/2013 4:01:00 PM	Offical , OPAL 6/5/2013 4:02:41 PM
📝	Financial Information		Offical , OPAL 6/5/2013 4:04:05 PM	
📝	Narrative		Offical , OPAL 6/5/2013 4:05:08 PM	Offical , OPAL 6/5/2013 4:05:33 PM
📝	Required Attachments		Offical , OPAL 6/5/2013 4:08:45 PM	
📝	Legislative Information		Offical , OPAL 6/5/2013 4:09:48 PM	

3. Submitting your Partnership Profile

3.a. Partnership Profile Menu

Navigate to the Partnership Profile Menu by clicking on the Partnership Profile name link. The Partnership Profile name link is displayed at the top of every form, in the Task List on the Home screen and in the Partnership Profile search tab results.

Task List

Partnership Profile tab search tab

Reports | Administration | Training Materials | Organization(s) | Profile | Logout

EXECUTE

⬅ Back

Partnership Profile Search

For more detailed instructions, select the **Show Help** button.

Partnership Profile Types [▼]

Partnership Profile Name [   ]

Person [   ]

Status [▼]

Organization [   ]

Export Results to [Screen ▼] Results Per Page [20 ▼] Sort By [-- SELECT -- ▼] [ASCENDING ▼]
Number of Results **12**

Results

DocumentType	Organization	Name	CurrentStatus
Partnership Profile	DM Testing Config	PP-dm_testing_config-00039	Profile Expired
Partnership Profile	Angie's test agency	PP-Angie's test agency-00041	Profile Expired
Partnership Profile	DMB Agency	PP-456-00042	Profile Expired

3.b. Change the Status

From the Partnership Profile Menu, click the "View Status Options" button located in the Change the Status section.

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Partnership Profile Menu

Document Information: PP-1003-00010

Details

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View, Edit and Complete Forms

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VIEW RELATED ITEMS

Perform Administrative Tasks

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VIEW ADMINISTRATIVE TASKS

Click the Apply Status button under the Profile Submitted status name to submit the Partnership Profile.

Click the Apply Status button under the Profile Cancelled status name to cancel the Partnership Profile.

4. Accessing your Partnership Profile

The Partnership Profile can be accessed from the Home screen and from the Partnership Profile tab search page.

4.a. My Tasks

To acess the Partnership Profile from the Home screen click the "Open Tasks" button located in the My Tasks section.

Scroll through the tasks to locate the Partnership Profile. Click on the Partnership Profile Name link (circled below). This link navigates to the Partnership Profile Menu.

4.b. Partnership Profile Search Tab

Click on the Partnership Profile tab near the top of the home screen.

Use the search criteria fields to filter the list of Parternership Profiles returned or leave the search criteria fields blank to return all Partnership Profiles for your organization. Click the "Execute" button to execute the Partnership Profile search.

Reports | Administration | Training Materials | Organization(s) | Profile | Logout

EXECUTE

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Partnership Profile Search

For more detailed instructions, select the **Show Help** button.

Partnership Profile Types	
Partnership Profile Name	
Person	
Status	
Organization	

Export Results to Screen **Results Per Page** 20 **Sort By** -- SELECT -- ASCENDING

Click on the Partnership Profile Name link (circled below). This link navigates to the Partnership Profile Menu.

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EXECUTE

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