



# MSHDA CDBG Grantee Training

January 22, 2026

# Agenda

## Morning: Regulatory Overview

National Objectives

Eligible Activities

Uniform Admin Requirements

Eligible Costs

Admin Roles

## MSHDA Updates

Funding Round Status

Policy Updates

Getting from LOI to Grant

## Afternoon: Grant Start-Up Essentials

Grant Agreement & Execution

Staffing & Procurement

Environmental Review

Exempt Cost Approval

Setting Up Activities & Drawing Funds

# **CDBG Basics:** National Objectives, Eligible Activities & Costs, Administration

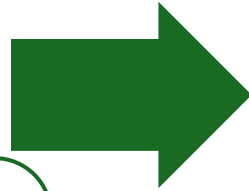
# CDBG Overview

- ▶ Title I, 1974 Housing & Community Development Act
  - ▶ HCDA Section 105(a) identifies specific eligible activities
- ▶ Annual Funding:
  - ▶ 70% to Entitlement Communities & Urban Counties
  - ▶ 30% to States for non-entitled communities & areas
- ▶ State of Michigan allocation - Michigan Strategic Fund
  - ▶ MSHDA administers housing-related eligible activities

# What Activities Are Eligible?

## Eligible Activity

- Section 105(a) activities as interpreted in 570.201-.206
- Not an ineligible activity under 570.207
- Must be consistent with needs & activities in ConPlan / Annual Plan



## National Objective

- 3 primary National Objectives:
  - Low/Mod
  - Slums/blight
  - Urgent need
- MSHDA focus:
  - L/M Housing
  - L/M Area

# National Objectives for MSHDA Activities

## Low/Mod Housing

- 570.208(a)(3)
- Structure must be occupied by LMI (< 80% AMI)
  - 1 LMI unit in a duplex; 51% LMI if 3+ units)
- Aggregation to meet 51% allowed in some instances

## Low/Mod Area

- 570.208(a)(1)
- Activities benefit all residents of area that is 51% LMI
- Area must be primarily residential

# The Rule: 24 CFR Part 570

- ▶ Eligible activities – authorized by NAHA Section 105(a)
  - ▶ 570.201: basic eligible activities
  - ▶ 570.202: rehabilitation/preservation activities
  - ▶ 570.204: CBDOs (being added in 2025-29 ConPlan)
  - ▶ 570.205-.206: planning & admin activities
  - ▶ 570.207: ineligible activities

# MSHDA CDBG Eligible Activities

## ▶ Homeowner Rehab

- ▶ Repairs/improvements for LMI homeowners to address health, safety and energy efficiency needs.

## ▶ Reconstruction/Resale

- ▶ Development on site of recent demolition for resale to a low- and moderate-income homebuyer

## ▶ Manufactured Housing

- ▶ Purchase of HUD approved manufactured housing units installed on land owned by grantee, zoned properly, sold to LMI homebuyer.

# MSHDA CDBG Eligible Activities

- ▶ **Unoccupied Rental Rehabilitation**
  - ▶ Redevelop unoccupied residential spaces for LMI renters, typically in mixed use, downtown settings.
- ▶ **Housing Infrastructure**
  - ▶ Physical improvements that enable affordable housing development (e.g., sidewalks, driveways, water/sewer extensions, roads, parking)

# 2 CFR Part 200: Uniform Admin Requirements

## Fin Mgt Systems

200.302-.303

## Procurement

200.318-.327

## Fed Assistance Financial Mgt

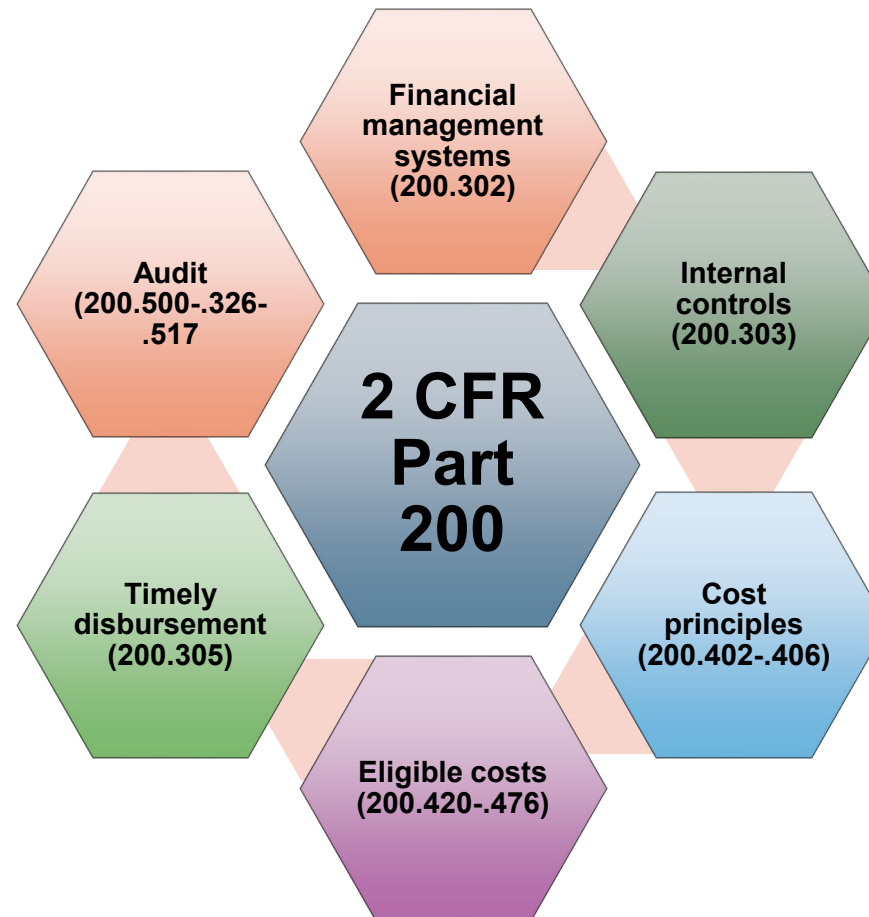
## Cost Principles

200.402-.406

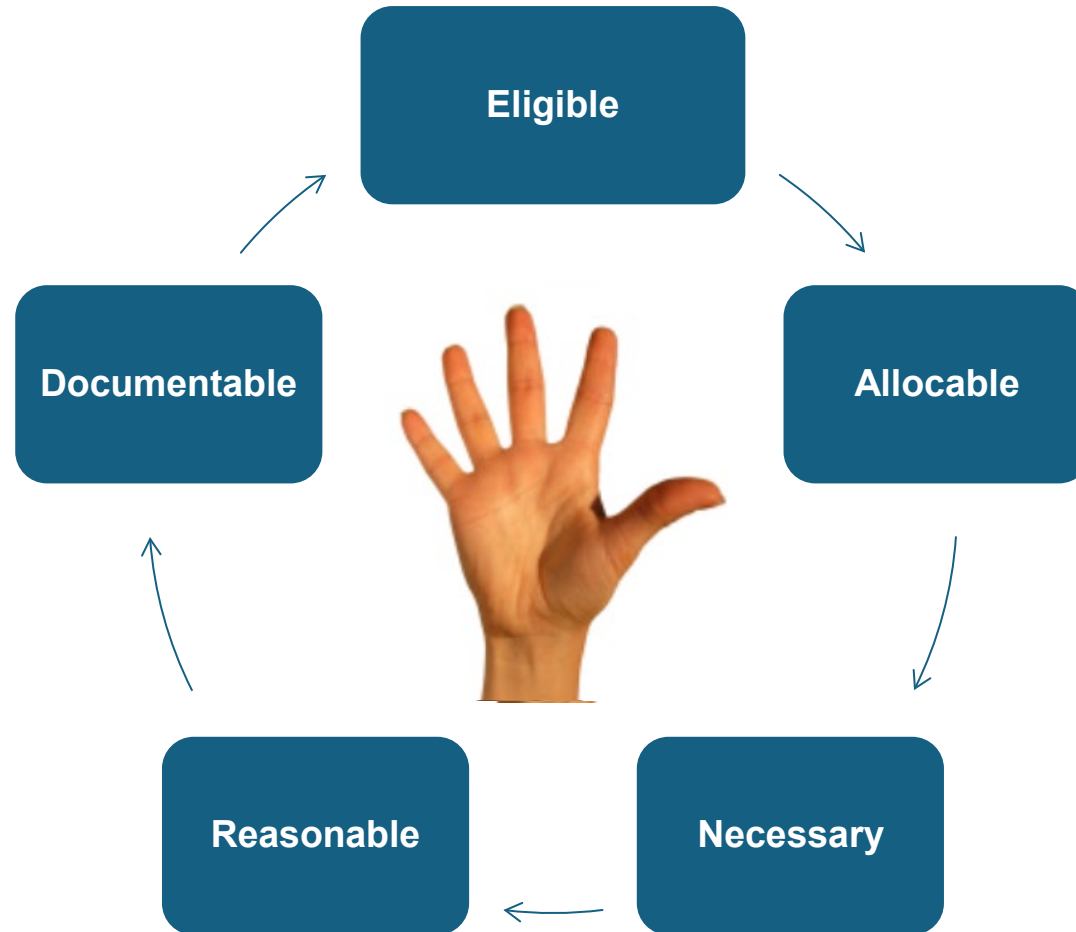
## Audit

200.501-.507

# Part 200 Financial Management Requirements



# 5 Key Characteristics of Allowable Costs

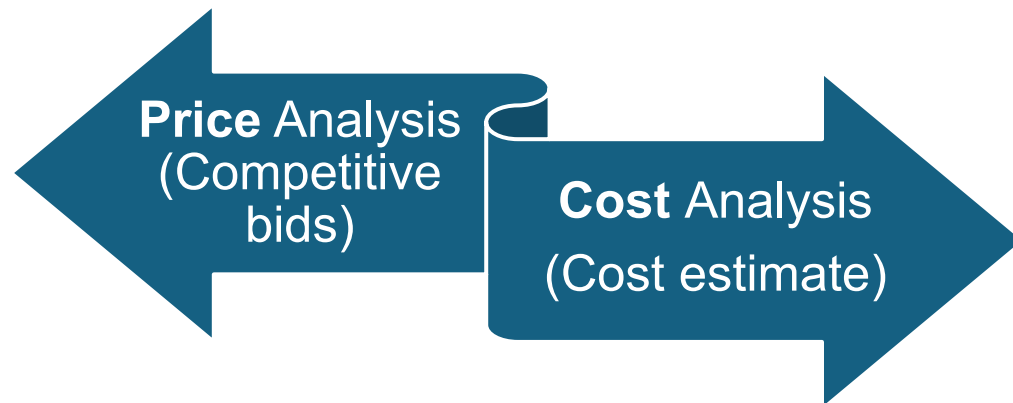


# Direct Project Costs

- ▶ Costs allocable to specific project/program/activity, e.g..
  - ▶ Project costs
  - ▶ Contracts/services
  - ▶ Materials/supplies
  - ▶ Professional fees

## 2 Requirements Controlling Expenditures

### Cost Reasonableness



**UGLGs are responsible for ensuring that all costs are reasonable**

### Procurement Rules

- ▶ State must establish procurement policies, “based on full and open competition.”
- ▶ 200.318-.327 procurement rules:
  - ▶ If Recipient is “procurer”, procurement rules apply
- ▶ If Developer/Owner is “procurer”:
  - ▶ Owner chooses contractor
  - ▶ But UGLG sets requirements & administers/advises
- ▶ Specify applicable requirements in each contract

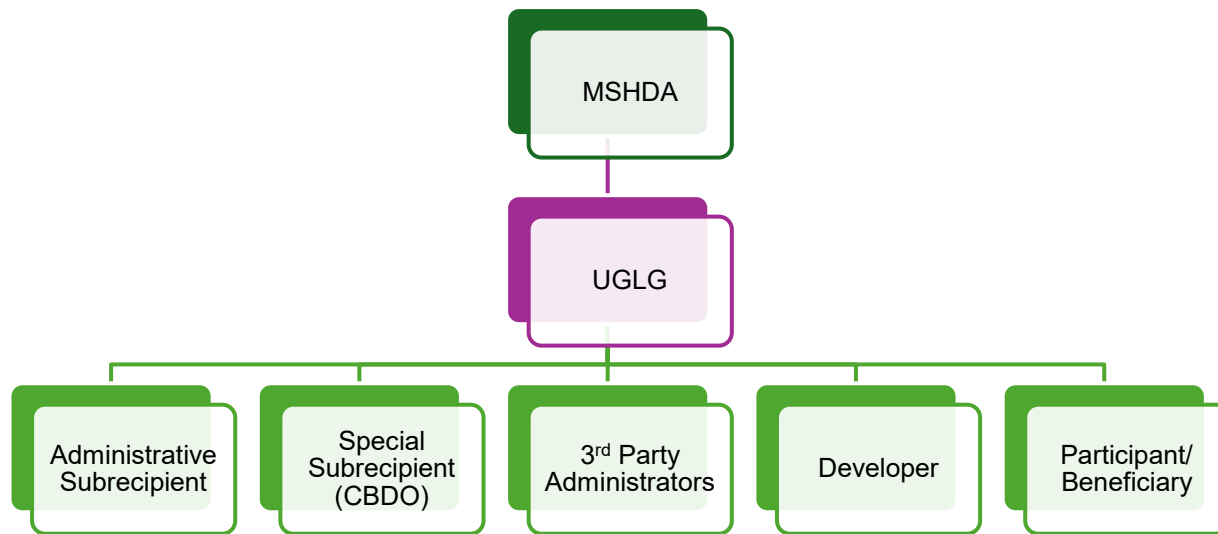
# Eligible Administrative Costs

- ▶ Administration
  - ▶ Staff or a Third-Party Administrator
  - ▶ Capped at 18%
  - ▶ Subject to Part 200 standards
    - ▶ Personnel: 200.430 (personnel records, payroll, no double billing)
    - ▶ Fringe 200.431
    - ▶ Documentation of personnel: 200.430(g)
- ▶ Materials and Supplies
- ▶ Professional Services
  - ▶ May be considered Exempt

# Documenting Staff Time

- ▶ Personnel Timekeeping Log
  - ▶ An after-the-fact accounting of time that shows CDBG hours separate from non-CDBG hours worked
  - ▶ Signed and certified by the employee and supervisor
  - ▶ Must reflect actual time worked, not just budgeted allocations
- ▶ Payroll Records
  - ▶ Pay stubs or payroll summaries showing wages paid
  - ▶ Documentation of payroll deductions and benefits

# CDBG Roles



**Bottom line: UGLGs are responsible regardless of what partners they use**

- ▶ Subrecipients – pass-thru administrators subject to same rules as UGLGs (Part 200)
  - ▶ Not currently permitted by MSHDA
  - ▶ CBDOs – special subrecipient pilot
- ▶ 3<sup>rd</sup> Party Administrators – provide admin services to UGLGs
  - ▶ Must be procured; subject to contract terms
  - ▶ UGLG must approve/designate beneficiaries
- ▶ Developers/owners – program beneficiaries
  - ▶ Selected by approved process
  - ▶ Subject to Written Agreement requirements

# Administrative Principles

- ▶ Goal: a program that complies, is documented & is sustainable
  - ▶ Transparency, accountability, sustainability
  - ▶ In federal program administration, if it is documented, it didn't happen
- ▶ Elements of good administration

Policies &  
procedures

Good written  
agreements

Financial  
management  
procedures &  
documentation

Recordkeeping

Monitoring

# Q & A



# MSHDA Program Update

# Status of Funding Rounds

- ▶ Letter of Intent Round 4 (LOI 4) launches on February 4, 2026.
- ▶ Letters of Intent (LOI) due March 4th.
- ▶ Applicants have 120 days from date of designation to complete and submit application.
- ▶ \$30 million CDBG funds available

# Policy Changes

- ▶ Updated activity Quickfinders will be posted with the LOI 4 launch
- ▶ Most updates are to use clearer language, rather than policy updates
- ▶ Add URR updates

# Steps from LOI to Agreement

- ▶ Application Approval
- ▶ Reservation Memo – becomes part of the Grant Agreement
- ▶ IGX Registration
- ▶ Annual Profile Review – must be submitted before Grant Agreement can be executed.

# Grant Start-Up

# Grant Agreement

- ▶ Agreement = foundation of program compliance
- ▶ Attachments (application + reservation memo) are part of the contract
- ▶ Covers scope, funding, compliance, affordability, & reporting requirements
- ▶ Use the agreement as a reference tool when questions arise

# Grant Start Up Items

- Exempt Cost Approval
- Create a Local Account
- Program Staffing & Procurement
- Program Guidelines
- Completion of NEPA Environmental Review
- Environmental Review Release of Funds

# CDBG Post Agreement Procedures Summary

- ▶ Attachment 2-F in Chapter 2 of the CDBG Policy Manual: [CDBG Policy Manual](#)
- ▶ Provides a step-by-step explanation of grant start up items

# Exempt Cost Approval

- ▶ Determine the use of admin funds and ensure exempt status
  - ▶ Complete the Determination of Level of Environmental Review Form (7-A)
  - ▶ Complete the Finding of Exempt Activity (7-B)
  - ▶ Complete the Exempt Activities Determination Letter (Sample 7-E)
- ▶ Grantees must request MSHDA approval prior to incurring exempt costs
  - ▶ These activities can include administration and environmental review costs

# Local Account

- ▶ Grantees must establish a dedicated local account for MSHDA CDBG funds
- ▶ Account must be separate, non-interest bearing, used only for CDBG activities
- ▶ No commingling with other local, state, or federal program accounts
- ▶ Account title must clearly identify: “MSHDA CDBG [Program Name]”

# Program Staffing & Procurement

## Local Government Roles

**Authorized Official:** Approves program guidelines, submits reports and financial draws

**Program Manager:** Creates program guidelines using template, compiles reports, reviews and approves payment of invoice. Provides financial insight prepares liens and financial draws

**Intake Specialist:** Processes applications, determines household eligibility, verifies income

**Construction Specialist:** Performs property inspections, writes specifications. Prepares cost estimates, solicits contractor bids, supervises construction

## Hired Program Partners

### Third Party Administrator (TPA)

- Can be hired to fulfill most responsibilities but for those of the Authorized Official, may not select beneficiaries
- Must be procured, usually through a Request for Proposal(RFP) or small purchase process, minimum two bids required

### Environmental Consultants

- MSHDA provides a list of pre-vetted consultants

### Construction Contractors

Only after environmental review complete

# Program Guidelines – Why They Matter

- ▶ Provide clarity to applicants about eligibility and requirements
- ▶ Ensure fairness and consistency in decision-making
- ▶ Protect the grantee from claims of discrimination or favoritism
- ▶ Demonstrate compliance with regulations
- ▶ Serve as a quick reference tool for staff and training
- ▶ Promote transparency and accountability to the public

## Program Guidelines – What They Include

- ▶ Eligibility criteria for households, properties, and costs
- ▶ Policies on fair housing, conflict of interest, fraud prevention, and complaints
- ▶ Activity-specific rules (rehab, rental, reconstruction, manufactured housing, infrastructure)
- ▶ Income verification methods and use of HUD AMI data
- ▶ Monitoring and reporting requirements, including record retention

# Environmental Review

# Environmental Review

- ▶ 24 CFR Part 58 – Applicable to HUD programs
- ▶ Requires review to occur at 2 levels of government
- ▶ For State CDBG:
  - ▶ UGLG is the “Responsible Entity”
  - ▶ MSHDA is the “Review Authority”

# Prohibited Actions Before Clearance (58.22)

- ▶ Until review completed and funds released, no participant (MSHDA UGLG, developer/local partners) may:
  - ▶ Commit (execute legally binding agreements) or expend **CDBG** funds
  - ▶ Commit or expend **non-HUD funds** (except for Exempt activities)
  - ▶ Undertake a “**choice limiting action**”, e.g.:
    - ▶ Acquisition (purchase options permitted)
    - ▶ Demolition/movement
    - ▶ Construction/rehabilitation/repair
- ▶ UGLG/partners can incur planning & other Exempt costs prior to release, but at their risk



# Project Scope

## Aggregation (58.32)

- Group integrally related activities into single ER
  - All funding sources & activities, not just CDBG
  - Also, aggregate multi-year project activities

## Tiering (58.15)

- Partial review if sites not yet selected (e.g., multi-site housing program)
  - Tier I – Overall activity review; establish parameters as sites are identified; RROF processed
  - Tier II - Site-specific reviews; no notices or RROF if no impacts beyond Tier 1; no project funding/work until Tier 2 completed.

# Project/Activity Review Categories

## Exempt (58.34)

- Environmental studies
- Financial services
- Admin
- Public services-no physical changes
- Testing
- Engineering/design
- TA/training
- Improvements to address imminent threats

## Categorically Excluded (not subject to 58.5 – 58.35(b))

- TBRA
- Supportive services
- Operating costs
- ED not construction
- Homebuyer purchase assistance
- Housing pre-dev costs
- Supplemental assistance to approved project

## Categorically Excluded (subject to 58.5 – 58.35(a))

- Existing public facilities & improvements
- Removal of arch. barriers
- Some 1–4-unit rehab (limits)
- Some 5+ unit rehab (limits)
- Individual action (not rehab) on 1-4 unit or 5+ scattered site
- Acquire/dispose existing structure/vacant land for same use

## Subject to NEPA (58.36) – any activity not in 58.34 or 58.35, such as:

- Multi-family & non-residential new construction or substantial rehab
- Conversions or changes in land use
- New public facilities or improvements

# Levels of Review

## Compliance Determination (58.35)

- Projects that are Categorically Excluded (CEST & CENST)
- Complete applicable Checklist
- If CENST or CEST with no compliance requirements, convert to exempt & no RROF (58.34(a)(12))

## Environmental Assessment (58.36 & 58.40)

- Projects not exempt or excluded, environmental assessment (EA) plus Statutory Checklists
- NOI/RROF

## Environmental Impact Statement (58.37)

- If EA finding of impact, EIS required

# Categorizing MSHDA CDBG Activities

## Admin

- Exempt (58.34)

## Homeowner Rehab

- CEST (58.35(a))

## Reconstruction/Resale

- CEST (58.35(a))

## Manufactured Housing

- CEST (58.35(a))

## Rental Rehab

- CEST (58.35(a)) or EA (58.36)

## Housing Infrastructure

- EA (58.36)

# UGLG ER Process Steps

1. Designate  
Certifying  
Officer

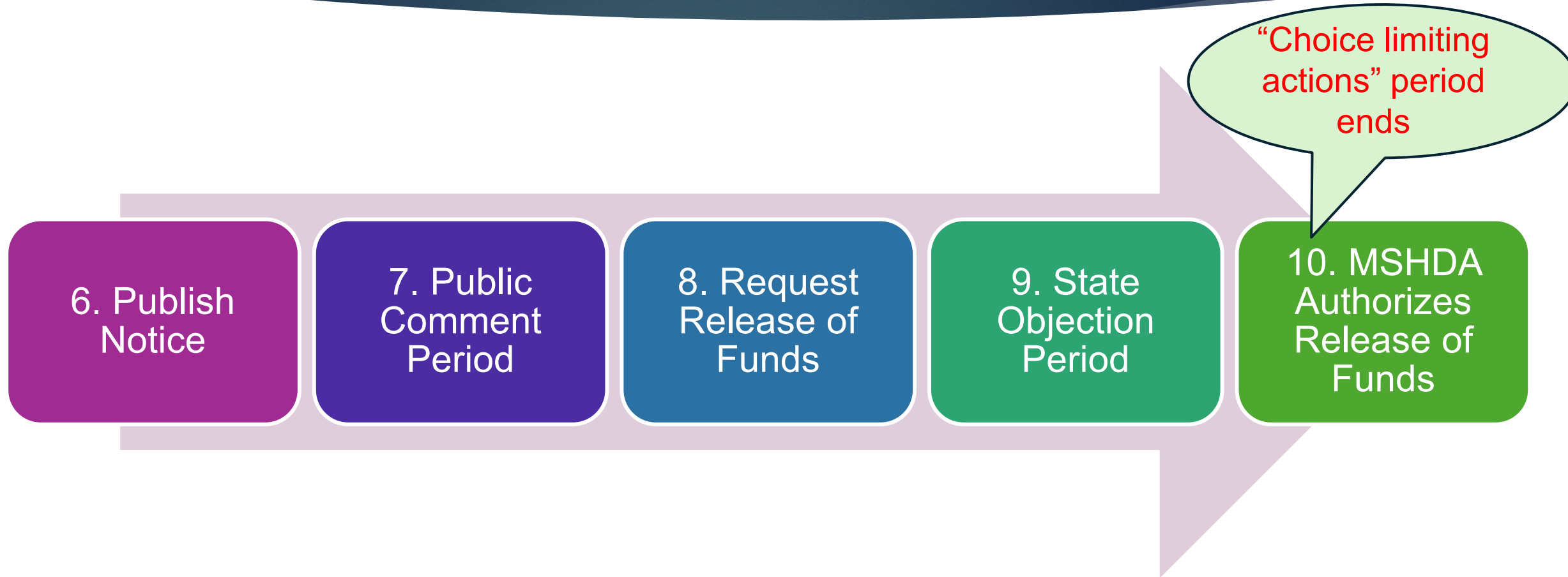
2. Define  
Project Scope  
(Aggregation)

3. Classify  
Project (Level  
of Review)

4. Conduct  
Review

5. Create  
Environmental  
Review  
Record (58.38)

# UGLG ER Process Steps, cont.




# Grant Management in IGX

# Setting up Grant Activities in IGX

- ▶ IGX is MSHDA's online grant management system
- ▶ Grantees have IGX accounts, registered users
- ▶ Grants are created and signed in IGX
- ▶ Almost all grant management tasks are handled in the IGX system, including submitting Financial Status Reports (draw requests) and setting up Activities (your projects)

# Finding the Grant within IGX



**MSHDA**  
MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

**MSHDA Grants System**

Home    Searches ▾
🔔 ?    ● Loryn 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

4550-00057-MIH	Activity 2022	Organization	8:42:36 AM
ARP-2022-4550-MIH-02	MI-Hope Grant 2022	Loryn's Testing Organization	Grant Executed 10/7/2022 4:53:07 PM
ARP-2022-4550-MIH-03	MI-Hope Grant 2022	Loryn's Testing Organization	Grant Executed 10/13/2022 3:51:56 PM
DPA-4550-789 Test	DPA Activity	Loryn's Testing Organization	Activity Approved/Closure Required 7/18/2022 11:16:34 AM
GRANTEE-Request-0029	Grantee System Access Request	Loryn's Testing Organization	System Access Request In Process 9/16/2022 1:36:02 PM
GRANTEE-	Grantee	Loryn's Testing Organization	System Access 9/16/2022

### My Opportunities

➤ Filter

#### My Opportunities

Name	Provider	Availability	Description
Annual Profile Review 2022	MSHDA	12/6/2021 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 2022	MSHDA	1/5/2022 12:00:00 AM -	

# Finding the Grant within IGX

The screenshot displays the MSHDA Grants System interface. At the top left is the MSHDA logo (Michigan State Housing Development Authority). The top right features the text "MSHDA Grants System". Below the logo is a navigation bar with "Home" and "Searches" (with a dropdown arrow). On the right side of the navigation bar are icons for a clock, chat, and document, along with the user name "AuthorizedOfficial" and a dropdown arrow.

A dropdown menu is open under "Searches", listing the following options: Recent Documents, Activities, Annual Profile Review, Agency Bills, Applications, Financial Status Reports, Grantee System Access Requests, and Grants. The "Grants" option is highlighted with a red box and a mouse cursor.

The main search area contains several input fields and dropdown menus:

- Number:** An empty text input field.
- Organization:** A text input field with "Grants" selected and highlighted by a red box.
- Type:** A dropdown menu with "NDD MI Neighborhood Grant" selected and highlighted by a red box.
- Division:** An empty text input field.
- Status:** A dropdown menu.
- Grant Specialist:** An empty text input field.
- Account Type:** A dropdown menu.

At the bottom right of the search area are two buttons: "Clear" and "Search".

# Initiating an Activity

The screenshot displays the MSHDA Grants System interface. The top navigation bar includes the MSHDA logo, the text "MSHDA Grants System", and user information for "Loryn AuthorizedOfficial". The main content area is titled "Document Landing Page" and features a sidebar on the left with various menu items. The "Initiate Related Doc" button is highlighted with a red box. The main content area shows a workflow process with a progress bar and a list of steps.

**MSHDA**  
MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

MSHDA Grants System

Home Searches

NDD-2024-4550-MIN-08

Grant Expenditure Report

History

Miscellaneous Attachments

Final Outcome Report

Monitoring Activities

Manager Closeout Override

County Income Limits Report

Status Options

Send to Amendment Request in Process

Related Documents

Initiate Related Doc

Financial Status Report

Activities

## Document Landing Page

New Note

### Instructions:

- View document details.

<b>Template</b> NDD MI Neighborhood Grant	<b>Instance</b> NDD MI Neighborhood Grant	<b>Process</b> Grant
<b>Document Name</b> NDD-2024-4550-MIN-08	<b>Document Status</b> Grant Executed	
<b>Organization</b> Testing Organization	<b>Your Role</b> Authorized Official	<b>Period Date</b> 5/24/2024 12:00:00 AM

Grant Creation in Progress ✓ Manager Review Required ✓ Grant Funding Required ✓ Grant Legal Review Required ✓ Grantee Signatures Required ✓ Specialist Document Review Director Signature Required ✓ Grant Executed ✓

# Initiating an Activity

**MSHDA**  
MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

Home Searches ▾

**NDD-2024-4550-MIN-08**

Attachments

Final Outcome Report

Monitoring Activities

Manager Closeout Override

County Income Limits Report

▼ Status Options

Send to Amendment Request in Process

▼ Related Documents

## Initiate Related Document

**Instructions:**

- Select a parent document and available related document.
- Use the Create button to initiate the related document.

Document Identifier  
Search parent documents by identifier...

Parent Document  
NDD-2024-4550-MIN-08

**Available Documents**  
NDD Activity

Create

Document  
Instruction

- View document d

Template  
NDD MI Neighbor

Document Name  
NDD-2024-4550-M

Organization  
Loryn's Testing Org

Grant Creation in Progress

Date  
24 12:00:00 A

Director S  
Requ

# Initiating an Activity

The screenshot shows the MSHDA (Michigan State Housing Development Authority) web application interface. A modal dialog titled "NDD Activity" is open, displaying the following information:

Provided By:	MSHDA
Provided To:	Loryn's Testing Organization
Activities Availability Dates:	8/13/2024 12:00:00 AM -
Due Date:	N/A

At the bottom of the dialog, there are two buttons: "Proceed" (highlighted with a red box) and "Cancel".

The background interface shows the MSHDA logo and navigation menu. The main content area displays document details for "NDD-2024-4550-MIN-08".

**Document Name:** NDD-2024-4550-MIN-08  
**Document Status:** Grant Executed

**Organization:** Loryn's Testing Organization  
**Your Role:** Authorized Official  
**Period Date:** 5/24/2024 12:00:00 AM

A progress bar at the bottom shows the following steps, all marked with a checkmark:

- Grant Creation in Progress
- Manager Review Required
- Grant Funding Required
- Grant Legal Review Required
- Grantee Signatures Required
- Specialist Document Review
- Director Signature Required

# Completing Activities Activity Form

**MSHDA**  
MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

**MSHDA Grants System**

Home    Searches ▾    AuthorizedOfficial ▾    [New Note](#)

**NDD-4550-0019**

Forms ▾

Activity Form

Status Options ▾

Submit Activity

Cancel Activity

Related Documents ▾

[Initiate Related Doc](#)

Grant

Financial Status Report

Activities

Tools ▾

## Document Landing Page

**Instructions:**

- View document details.

<b>Template</b> NDD MI Neighborhood Activity 2024	<b>Instance</b> NDD Activity	<b>Process</b> Activities
<b>Document Name</b> NDD-4550-0019	<b>Document Status</b> In Progress	
<b>Organization</b> Testing Organization	<b>Your Role</b> Authorized Official	

# Completing Activities Activity Form

**NDD-4550-0012**

Forms

- Activity Form
- Existing Housing Unit Improvement Activity Set Up

Status Options

Submit Activity

Cancel Activity

Related Documents

Initiate Related Doc

Grant

Financial Status Report

## Activity Form

New Note | Print | **Save**

*Last Saved 6/10/2025 1:19 PM*

### Activity Data Capture

Date Requested  
06/10/2025

Type of Activity:

Existing Housing Unit Improvement Activity

New Housing Unit Production

# Activity Set Up

## Activity Data Capture

Homeowner Name

Occupant Name

Address

City

State

Michigan

Zip

County

Is the head of the household female?  Yes  No

Activity Category Requested:

A. Exterior Rehabilitation

B. Interior Rehabilitation

MSHDA Funds

Leverage Funds




Total

\$0.00

\$0.00



# Activity Set Up

## Property Information

Single Family Home

Rental Unit

Annual Occupant Household Income

\$

Household Size

# Activity Set Up

## 1. Activity Description

0 of 3000

## 2. Provide a description of the procurement method used to determine cost reasonableness (Attach a minimum of two quotes)

0 of 3000

## 3. Have the specs/work orders been approved by all parties?

Yes  No

(If approved by all parties No, Explain)

0 of 3000

# Activity Set Up

4. Are all of the proposed activities being completed by licensed and insured contractors?

- Yes  No

(If licensed and insured contractors No, Explain)

0 of 3000

5. Are asbestos containing material likely to be disturbed while implementing this project?

- Yes  No

Contractors will be currently licensed Asbestos Abatement Contractors.

6. How will lead based paint be addressed

- Housing Constructed Before 1978
- Lead Safe Work Practices
  - Interim Controls or Standard Practices
  - Abatement
- Exempt: Housing constructed 1978 or later
- Exempt: No paint distributed
- Otherwise Exempt

# Activity Set Up

8. If applicable, has the NEPA Environmental Review been completed?

Yes  No

Was this Tier 1 or Tier 2 review?

Tier 1  Tier 2

Please Upload Tier 2 Environmental Review Documentation

Browse

*Drag Files Here*

9. Is this activity in a Historic Preservation Area?

Yes  No

If Yes, please provide approval letter(s).

Browse

*Drag Files Here*



# Activity Set Up

10. Is this activity in a Brownfield Redevelopment Area?

Yes  No

11. Is this activity tied to TIF (Tax Increment Financing)?

Yes  No

12. Has the Contractor been debarred?

Yes  No

Provide the Contractor Eligibility Verification Date ([SAM.gov](https://www.sam.gov))



MM/DD/YYYY

# Activity Set Up

## Supporting Documentation

### Before Pictures

[Browse](#) *Drag Files Here*

### Estimates

[Browse](#) *Drag Files Here*

Estimate Selected

### Income Verification Documents

[Browse](#) *Drag Files Here*

### Ownership/Affidavit of Affixture/Lease Agreement

[Browse](#) *Drag Files Here*

### Property Insurance

[Browse](#) *Drag Files Here*

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# Completing Activities - Activity Set Up Form Before Pictures



# Drawing Funds in IGX

# Finding the Grant within IGX



**MSHDA™**  
MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

## MSHDA Grants System

Home    Searches ▾
🔍 ?    ● Loryn AuthorizedOfficial ▾

### Dashboard

**Instructions:**

- Click on an Opportunity Name to start applying for the Opportunity.
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# Finding the Grant within IGX

**MSHDA**  
MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

Home Searches ▾

AuthorizedOfficial ▾

**Grar**

- Recent Documents
- Activities
- Annual Profile Review
- Agency Bills
- Applications
- Financial Status Reports
- Grantee System Access Requests
- Grants**

**Search**

Number

Organization

Type

Division

Status

Grant Specialist

Account Type

# Initiating an FSR

**MSHDA**  
MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

**MSHDA Grants System**

Home Searches 🔔 💬 📄 👤 Loryn AuthorizedOfficial New Note

**NDD-2024-4550-MIN-08** **Document Landing Page**

Grant Expenditure Report

**History**

- Miscellaneous Attachments
- Final Outcome Report
- Monitoring Activities
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**Status Options**

- Send to Amendment Request in Process

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<b>Document Name</b> NDD-2024-4550-MIN-08	<b>Document Status</b> Grant Executed	
<b>Organization</b> Testing Organization	<b>Your Role</b> Authorized Official	<b>Period Date</b> 5/24/2024 12:00:00 AM

Progress Bar:

- Grant Creation in Progress
- Manager Review Required
- Grant Funding Required
- Grant Legal Review Required
- Grantee Signatures Required
- Specialist Document Review Director Signature Required
- Grant Executed

# Initiating an FSR

**MSHDA**  
MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

Home Searches ▾

**NDD-2024-4550-MIN-08**

Grant Expenditure Report

History

Miscellaneous Attachments

Final Outcome Report

Monitoring Activities

Manager Closeout Override

County Income Limits Report

▼ Status Options

Send to Amendment Request in Process

## Initiate Related Document

**Instructions:**

- Select a parent document and available related document.
- Use the Create button to initiate the related document.

Document Identifier

Parent Document

Available Documents

**Create**

Document  
Instructions:  
• View document details

Template  
NDD MI Neighborhood

Document Name  
NDD-2024-4550-MIN-0

Organization  
Loryn's Testing Organi

Grant Creation in Progr

Director Signatu

# Initiating an FSR

The screenshot displays the MSHDA (Michigan State Housing Development Authority) interface. The main window is titled "NDD MI Neighborhood FSR". A modal window is open, showing the following details:

Provided By:	MSHDA
Provided To:	Loryn's Testing Organization
Financial Status Report Availability Dates:	6/19/2024 12:00:00 AM -
Due Date:	N/A

At the bottom of the modal, there are two buttons: "Proceed" (highlighted with a red box) and "Cancel".

The background interface shows a sidebar with navigation options: Home, Searches, NDD-2024-4550-MIN-08, Grant Expenditure Report, History, Miscellaneous Attachments, Final Outcome Report, Monitoring Activities, Manager Closeout Override, County Income Limits Report, Status Options, and Send to Amendment Request in. The main content area displays document details for "NDD MI Neighborhood Grant" with a status of "Grant Executed". A progress bar at the bottom indicates the following steps: Grant Creation in Progress (checked), Manager Review Required (checked), Grant Funding Required (checked), Grant Legal Review Required (checked), Grantee Signatures Required (checked), and Specialist Document Review Director (checked).

# Completing an FSR

The screenshot displays the MSHDA Grants System interface. The top navigation bar includes the MSHDA logo (Michigan State Housing Development Authority) and the title "MSHDA Grants System". The user is logged in as "AuthorizedOfficial". The main content area is titled "Document Landing Page" and shows details for document "NDD-2024-4550-MIN-08 FSR #5".

**Instructions:**

- View document details.

**Document Details:**

<b>Template</b> NDD MI Neighborhood FSR	<b>Instance</b> NDD MI Neighborhood FSR	<b>Process</b> Financial Status Report
<b>Document Name</b> NDD-2024-4550-MIN-08 FSR #5	<b>Document Status</b> In Progress	
<b>Organization</b>	<b>Your Role</b> Authorized Official	


**Progress Tracker:**

A horizontal progress bar with eight steps: In Progress (checked), Submitted, Specialist Review Required, Manager Review Required, Director Review Required, Payment Approved/Batch Ready, Payment Approved/Batch Sent, and Payment Complete.

**Left Sidebar:**

- Home
- Searches
- NDD-2024-4550-MIN-08 FSR #5
- Forms
  - Financial Status Report/Payment Request (highlighted with a red box)
- Status Options
  - Submit FSR
  - Cancel FSR
- Related Documents
  - Initiate Related Doc
- Grant

# Completing an FSR

**MSHDA**  
MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

MSHDA Grants System

Home    Searches ▾

AuthorizedSigner ▾

New Note | Print | Save

Last Saved 5/13/2024 8:12 AM

MSF-2023-4550-CDB-02  
FSR #1

Financial Status Report/Payment Request

Forms

Financial Status Report/Payment Request ⓘ

Status Options

Submit FSR

Cancel FSR

Related Documents

Initiate Related Doc

Grant

## Financial Status Report/Payment Request

Attention

### Report Information

Final Report:  Yes  No

Current Report Period: From  To

Check Date:

Check #:

Check Amount: \$

# Completing an FSR

## Expense Summary

Component/Activity	Approved Funds	Previous Expenditures	Returned Funds	This Period Expenditures	Total Expenditures	Current Balance
Grant Activities A	\$250,000.00	\$0	\$0.00	\$0	\$0.00	\$250,000.00
Grant Activites B	\$250,000.00	0	0	0	\$0.00	\$250,000.00
Administrative Costs	\$50,000.00	\$0	\$0.00	\$0	\$0.00	\$50,000.00
<b>TOTAL</b>	<b>\$550,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$550,000.00</b>

Requested Advance

\$

0.00

Cash on Hand

\$0.00

**TOTAL PAYMENT REQUESTED**

**\$0.00**

# Completing an FSR

## Complete the Expense Detail Section

- Budget Category
- Address
- Activity
- Description
- Total Amount of Invoice
- Amount Billed to MSHDA
- Supporting Documentation

## Expense Detail

Budget Category	Address (Enter "Admin" for Administrative Costs)	Activity	Description	Total Amount of Invoice	Amount Billed to MSHDA	Supporting Documents	
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	\$ <input type="text" value=""/>	\$ <input type="text" value=""/>	<input type="button" value="Select"/> <i>Drag Files Here</i>	<input type="button" value="+"/> <input type="button" value="-"/>
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	\$ <input type="text" value=""/>	\$ <input type="text" value=""/>	<input type="button" value="Select"/> <i>Drag Files Here</i>	<input type="button" value="+"/> <input type="button" value="-"/>

# Completing an FSR

**MSF-2023-4550-CDB-02 FSR #1**

- Forms
- Financial Status Report/Payment Request
- Status Options
  - Submit FSR
  - Cancel FSR
- Related Documents
  - Initiate Related Doc
- Grant
- Tools
  - Landing Page
  - Add/Edit People
  - Status History
  - Attachment Repository
  - Modification Summary
  - Document Validation
  - Notes

## Financial Status Report/Payment Request

New Note | Print | Save  
Last Saved 5/13/2024 8:12

> Attention

### Report Information

Final Report:  Yes  No

Current Report Period: From  To

Check Date:

Check #:

Check Amount: \$

### Expense Summary

Component/Activity	Approved Funds	Previous Expenditures	Returned Funds	This Period Expenditures	Total Expenditures	Current Balance
Grant Activities A	\$250,000.00	\$0	\$0.00	\$0	\$0.00	\$250,000.00
Grant Activites B	\$250,000.00	0	0	0	\$0.00	\$250,000.00
Administrative Costs	\$50,000.00	\$0	\$0.00	\$0	\$0.00	\$50,000.00
<b>TOTAL</b>	<b>\$550,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$550,000.00</b>

# Things to keep in mind

- ▶ It is recommended that FSRs should be kept between \$1,000 and \$100,000.
- ▶ Activities must be fully completed in IGX before an FSR that includes that activity will be approved.

# Q&A

## Next Steps