



## IGX System Guide-Grantees

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The MI-HOPE grant is managed using the [MSHDA Grants System](#) in IGX.

## Creating a New Agency/Authorized Official

To create a User Profile for an Authorized Official or to register a new agency, click New User? Click Here at the bottom of the login screen, outlined here in red. This should only be filled out by Authorized Officials. Other Users are created using the Grantee System Access Form under My Opportunities.

By using the MSHDA Grants System Application, you agree that IT Resources, including devices, networks, data, software, email, and system accounts, are provided to conduct official SOM business. Authorized Users must act within the scope of their employment, contractual, or other relationship with the SOM and must agree to use IT Resources efficiently, responsibly, professionally, ethically, and lawfully, using approved applications, tools, and mechanisms. Users, regardless of their relationship with the SOM, as a condition of receiving access to SOM IT Resources, agree to abide by this standard, all applicable SOM policies and procedures, and all federal, state, and local laws. Users must review these guidelines regularly. Failure to do so does not justify non-compliance. You can find the full Acceptable Use Policy at: [MSHDA - Acceptable Use Policy](#)

**Login**

Username

Password

**Log In**

[Login Assistance](#)  
[New User? Click Here](#)

Complete the New User Registration form. The fields shown here in red are required. The organization should be the name of the organization the user wants to register under.

**New User Registration**

Page instructions for the registration modal

**First Name**  
  
The First Name field is required.

**Middle Name**

**Last Name**  
  
The Last Name field is required.

**Prefix**

**Suffix**

**FEIN**

**Organization**  
  
This field is required.

**Title**

**Address**  
  
The Address field is required.

**Address 2**

**State**

**County**  
  
The County field is required.

**City**  
  
The City field is required.

**Zip Code**  
  
The Zip Code field is required.

**Email**

**Phone**

New agencies will need to create a New Agency and an Authorized Official. To do that, Select New Agency and New Agency Authorized Official from the Request Type Drop Down box.

The Authorized Official will need to select New Agency Authorized Official from the Request Type drop down box. The System type links back to the type of grants you will apply for. The options are Homeless Assistance Links Online or (HALO), Neighborhood Housing Initiatives Division or (NHID), and Housing Education Program or (HEP).

Phone 2

Fax

Cell Phone

Website

Username

The Username field is required.

Password

The Password field is required.

Verify Password

The Verify Password field is required.

Description of user/access being requested

This field is required.

Request Type

System Type

This field is required.

Existing Org Number

Agency Type

This field is required.

Faith Based

Beginning Month of FY

UEI Number

Are you the Authorized Official?

This field is required.

Effective Date

This field is required.

The UEI is the Unique Entity Identifier obtained by agencies from SAM.gov. The effective date is the date the profile should start. When the New User Registration Form is complete, click Register.

## System Access

To request a User Profile for another employee the Authorized Official will submit a Grantee System Access form, this will normally take 1-2 days to process. To get to the System Access Form, the Authorized Official will log into the system and select Grantee System Access under My Opportunities. Select Proceed on the pop up to go to the System Access Form.

**MSHDA Grants System**

Home Searches - ? 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
DPA-4550-789 Test	DPA Activity	Loryn's Testing Organization	Activity Approved/Closed. ut. Required	7/18/2022 11:16:34 AM	
HDF-2022-4550-HHS	Habitat For Humanity Grant 2022	Loryn's Testing Organization	Grant Executed	7/8/2022 11:48:31 AM	

#### My Opportunities

Filter

My Opportunities

Name	Provider	Availability	Description
Annual Profile Review 2022	MSHDA	12/6/2021 12:00:00 AM - Open Ended	
<b>Grantee System Access</b>	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 - Open Ended	

Announcements

That will take you to the Grantee System Access Form Landing Page. Click on the System Access Form on the left-hand side of the page.

**MSHDA Grants System**

Home Searches - ?

### GRANTEE-Request-0032 Document Landing Page

Instructions:

- View document details.

**Template**  
Grantee System Access

**Instance**  
Grantee System Access

**Process**  
Grantee System Access Request

**Document Name**  
GRANTEE-Request-0032

**Document Status**  
System Access Request In Process

**Organization**  
Organization

**Your Role**  
Authorized Official

System Access Request In Process | In Review | Completed | Denied

Forms: System Access Form

Status Options: Submit Request

Related Documents: Initiate Related Doc

Tools: Landing Page, Add/Edit People, Status History, Attachment Repository, Modification Summary

This will take you to the System Access Form where you will need to select the type of request. You have 7 options for the Request type drop down which will change the rest of the form.

- **New User:** submits a request to add a new user to the system.
- **Modify User Profile or System Role:** submits a request to make changes to a current user.
- **Change Authorized Official:** submits a request to deactivate the current Authorized Official or add an additional one.
- **Transfer User from One Organization to Another:** this will request to move a user to a new organization.
- **Modify Organization Information:** submits a request to update or change the Organization Information.
- **Delete User Access Rights:** submits a request to make a user inactive.
- **Other:** if the other options do not apply for your request, submit a request describing in detail what you are trying to accomplish.

## System Access Form

The screenshot shows the top portion of the System Access Form. On the left, there is a 'Request Type' dropdown menu with a list of 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'. The 'New User' option is currently selected. To the right of the dropdown, there are two input fields: 'Organization' and 'Request Submitted By'. The 'Organization' field contains the text 'Organization', and the 'Request Submitted By' field contains the text 'AuthorizedOfficial'.

### 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 box, you will need to choose from Agency Administrator and Agency Viewer. An agency can have more than one of either role. The Agency Administrator can complete many of the forms within the IGX system though they may not be able to submit them. The Agency Viewer can see many of the forms, but they will not have the ability to save changes or submit. The User Inactive date is only required if you selected Delete User Access Rights. Give the reason you need to make the change in the User Description of Request.

### User Information

The screenshot shows the 'User Information' section of the form. It contains several input fields and a dropdown menu. At the top, there are two text input fields: 'User First Name' and 'User Last Name'. Below these are three more text input fields: 'User Email', 'User Phone', and 'User Fax'. Underneath the 'User Email' field is a 'User Access Level' dropdown menu. At the bottom of this section, there are two date input fields: 'User Active Date' and 'User Inactive Date', each with a calendar icon. Finally, there is a large text area labeled 'User Description of request' at the very bottom.

## Authorized Official Change

If you select Change Authorized Official in the Request Type drop-down you will see the Authorized Official Change section. Choose whether the prior Authorized Official should be deactivated. If the user has left the agency they should be deactivated. If the prior Authorized Official will not be deactivated choose a new role to put them in. They can be either an Agency Administrator or an Agency Viewer. Choose who should be listed as the new Authorized Official from the drop-down list of your agency's current users. Give the reason you need to make the change under Describe Request.

### 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. Give the reason you need to make 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 instance, if the Agency's name changed but everything else is the same, you only need to enter the agency's new name under Agency Name. You will need to give the reason you need to make 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

If you select Other in the Request Type drop-down you will see the Other section. Please describe the request in the narrative box.

### Other

Please Describe the request

Once the System Access Form has been completed with no errors, the Authorized Official can submit. Select Submit Request under Status Options on the left-hand side of the screen.

**MSHDA** Michigan State Housing Development Authority

**MSHDA Grants System**

Home | Searches | AuthorizedOfficial

**GRANTEE-Request-0029**

System Access Form

Request Type: New User | Organization: Organization | Request Submitted By: AuthorizedOfficial

**Click here to submit System Access Form**

**User Information**

User First Name: [ ] | User Last Name: [ ]

User Email: [ ] | User Phone: [ ] | User Fax: [ ]

## Annual Profile Review

### Initiating the Annual Profile Review

The Authorized Official will log into the IGX system. This will take you to the Dashboard where you will be able to click on the Annual Profile Review under My Opportunities.

**MSHDA** Michigan State Housing Development Authority

**MSHDA Grants System**

Home | Searches | 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**

Name	Document Type	Organization	Status	Status Date	Due Date
APR-2022-4550-04	Annual Profile Review	Organization	Profile in Progress	8/5/2022 11:03:19 AM	
DPA-4550-789 Test	DPA Activity	Organization	Activity Approved/Closed out Required	7/18/2022 11:16:34 AM	
HDF-2022-4550-	Habitat For	Organization	Grant Executed	7/8/2022	

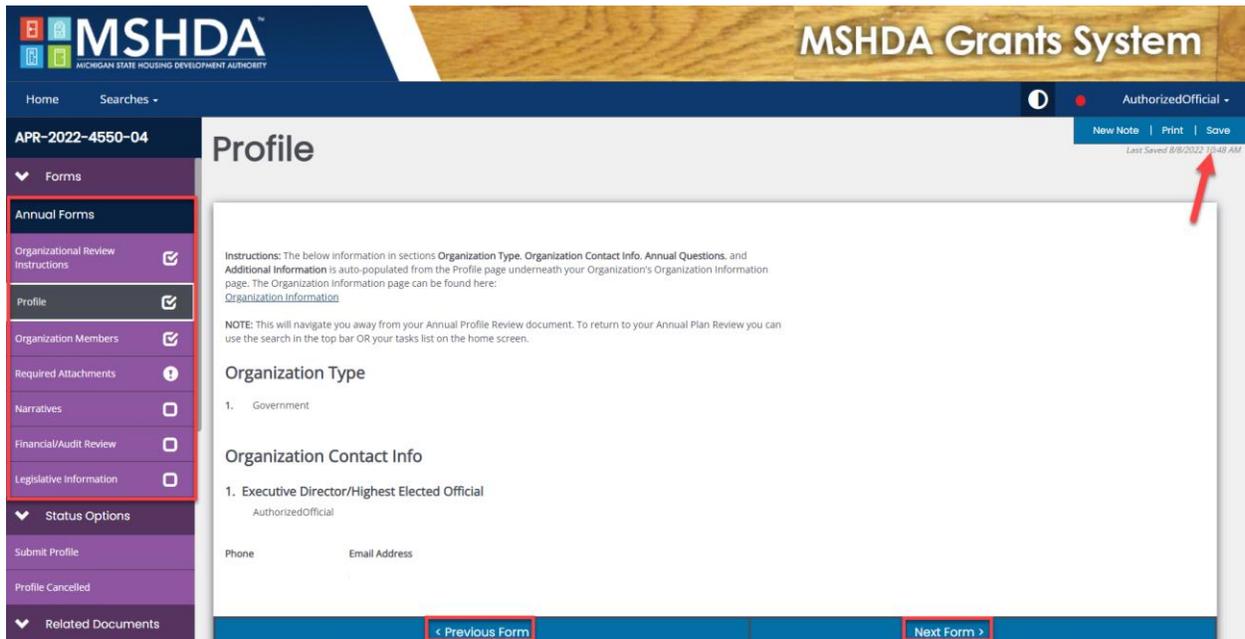
**My Opportunities**

Name	Provider	Availability	Description
Annual Profile Review 2022	MSHDA	12/6/2021 12:00:00 AM - Open Ended	
HEP Application 2022	MSHDA	1/5/2022 12:00:00 AM - Open Ended	
HEP HUD Application 2022	MSHDA	2/16/2022 12:00:00 AM - Open Ended	

**Announcements**

## Navigating Within the Annual Profile Review

This will show you to the Annual Profile Review. The menu on the left-hand side of the screen includes the forms that need to be completed to submit the Annual Profile Review to MSHDA for review. You can move around within the Annual Profile Review using this menu. The forms with check marks have been completed, the exclamation mark means they have errors, and the empty squares mean they have not been saved. Each form also has Previous Form and/or Next Form buttons at the bottom. The save button for each page is in the top right-hand corner.

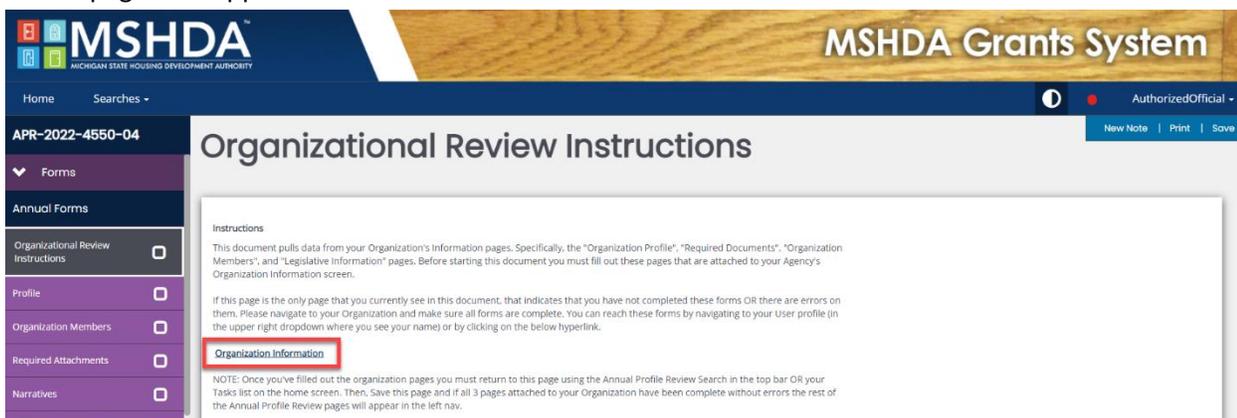


## How to Complete the Annual Profile Review

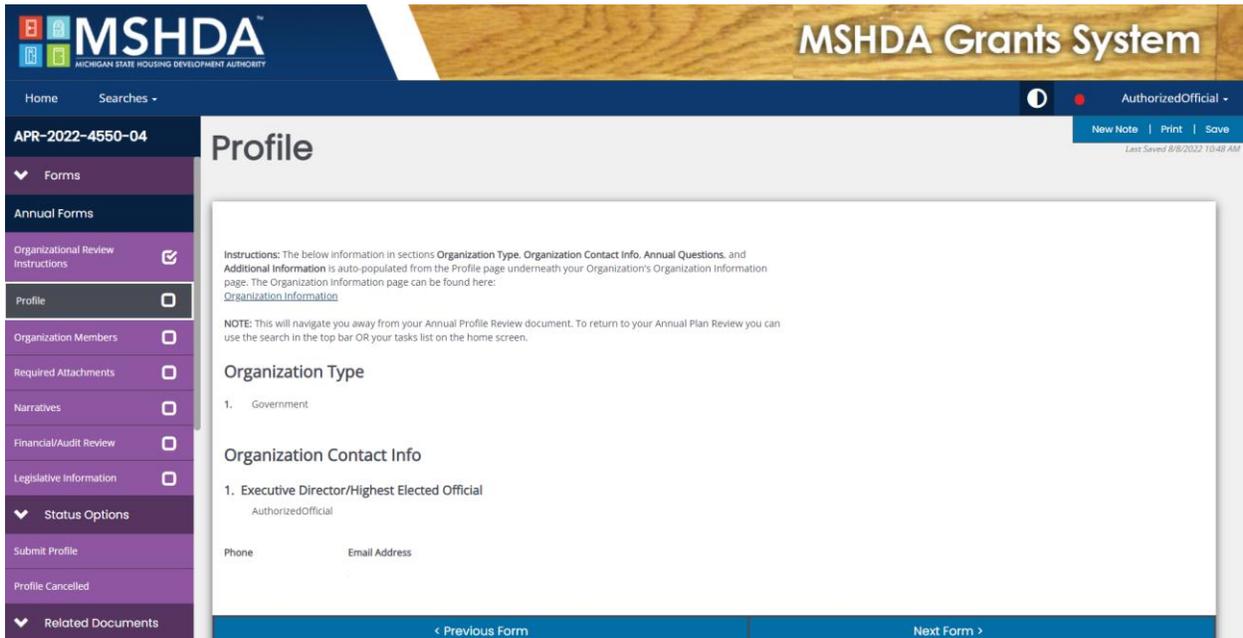
This document pulls data from your Organization's Information pages. Specifically, the "Organization Profile", "Required Documents", "Organization Members", and "Legislative Information" pages. Before starting this document, you must save these pages within your Organization's Information Pages.

If the only page you can see in your Annual Profile Review is the Organizational Review Instructions, 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 on the Organizational Review Instructions within the Annual Profile Review.

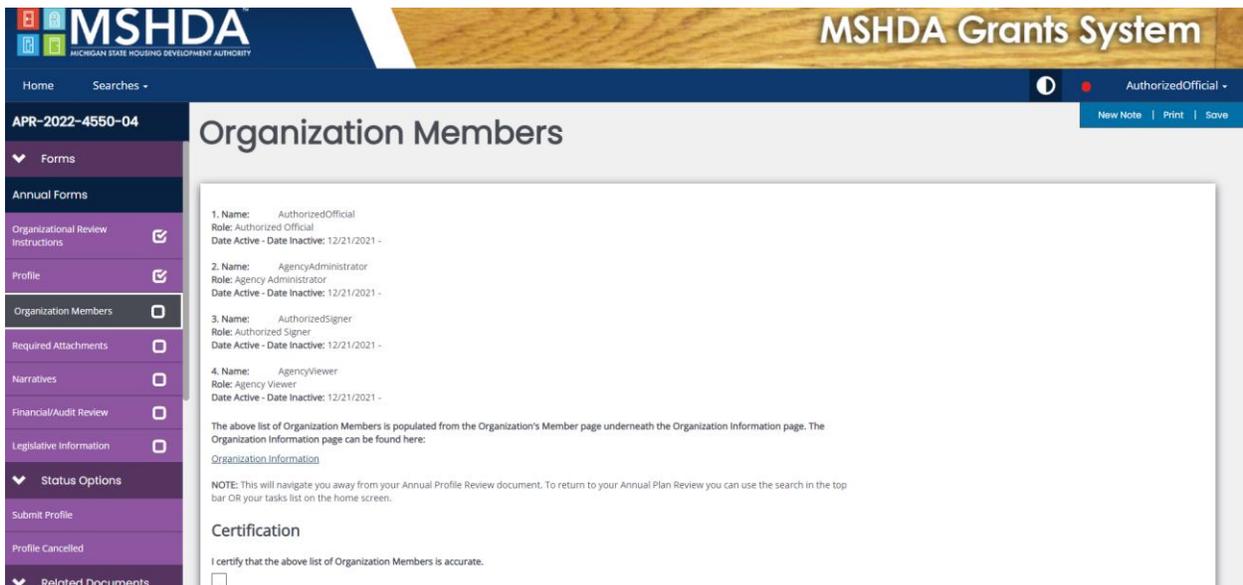
NOTE: Once you've filled out the organization pages you must return to the Annual Profile Review using the Annual Profile Review Search in the top bar OR your Tasks list on the home screen. Then, Save this page and if all 3 pages attached to your Organization have been completed without errors, the rest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



The Profile form auto-populates from the Organizations Information page. Check to see if any changes need to be made to either section. If something needs to be changed you can click on the Organization Information link under the first paragraph. If both sections are correct, you can continue scrolling to the Annual Questions.



The Organization Members page lists the members of your organization who are listed as active in the system. Check to ensure that this list is correct. Go to the Organizational Information page to update the list if changes need to be made. When the list is correct, check the box certifying that the list of Organization Members is accurate.



The attachments on the Required Attachments form are auto populated from the Attachments page within your Organization Information page.

Check to make sure that each attachment is up to date. If the attachment is up to date, select yes. If the attachment is not up to date, you will need to go to the Organizational Information page to upload the new file.

The screenshot shows the 'Required Attachments' form in the MSHDA Grants System. The header includes the MSHDA logo and 'MSHDA Grants System'. The user is logged in as 'AuthorizedOfficial'. The form ID is 'APR-2022-4550-05'. The left sidebar lists various form categories, with 'Required Attachments' selected. The main content area contains instructions and three attachment items:

- 1. Organizational Mission Statement**  
Current File: [Organizational Mission Statement.pdf](#) Date Uploaded: 08/08/2022  
Is the above attachment up to date?  
 Yes  No
- 2. Board of Directors**  
Current File: [Board of Directors.pdf](#) Date Uploaded: 08/08/2022  
Is the above attachment up to date?  
 Yes  No
- 3. Organizational Chart**  
Current File: [Organizational Chart.pdf](#) Date Uploaded: 08/08/2022  
Is the above attachment up to date?  
 Yes  No

Navigation buttons for '< Previous Form' and 'Next Form >' are at the bottom.

The Narrative form asks questions about the organization including your target population, service area, staffing, and local services.

The screenshot shows the 'Narratives' form in the MSHDA Grants System. The header includes the MSHDA logo and 'MSHDA Grants System'. The user is logged in as 'AuthorizedOfficial'. The form ID is 'APR-2022-4550-04'. The left sidebar lists various form categories, with 'Narratives' selected. The main content area contains instructions and two questions:

**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

Navigation buttons for '< Previous Form' and 'Next Form >' are at the bottom.

The Financial Information form asks about annual audits, auditors, annual financial statements, single audits, and the organizations budget.

The screenshot shows the 'Financial/Audit Review' form in the MSHDA Grants System. The page title is 'Financial/Audit Review'. The left sidebar contains a navigation menu with 'Forms' expanded to show 'Annual Forms'. The 'Financial/Audit Review' form is active, showing the following sections:

- Annual Audit**
  - 1. Do you have an annual audit?  
 Yes  No
  - 2. If yes, identify your auditor's name, company, and contact information:
    - Name:
    - Company:
    - Phone Number:
    - Address:
    - City:
    - State:
    - Zip Code:
  - 3. When does your organization's fiscal year start and end for current Financials submitted?
    - Start Date:
    - End Date:
  - 4. What is your Organization's last fiscal year end date for any required Single Audits?
    - End Date:

The Legislative Information form is auto filled from the Organizational Information page. Check to ensure that the US Congressional Districts, State Senate Districts, and State House of Representative Districts for your organization are correct. Certify that the data is up to date and accurate at the bottom of the page, then save.

The screenshot shows the 'Legislative Information' form in the MSHDA Grants System. The page title is 'Legislative Information'. The left sidebar contains a navigation menu with 'Forms' expanded to show 'Annual Forms'. The 'Legislative Information' form is active, showing the following sections:

- Legislative Information:**
  - U.S. Congressional District Numbers  
1
  - U.S. Congressional Representatives  
District #1: Jack Bergman
  - State Senate District Numbers  
37
  - State Senators  
District #37: Wayne Schmidt
  - State House of Representatives District Numbers  
105

## Submitting the Annual Profile Review

Once the entire profile has been completed with no errors, the Authorized Official can submit the profile. The Annual Profile Review can be submitted from any form within the Annual Profile Review. Select Submit Profile under Status Options on the left-hand side of the screen. The Annual Profile will be reviewed by MSHDA for organizational and financial capacity, if problems are identified the Annual Profile will be returned for modifications.

**APR-2022-4550-04**

### Legislative Information

Legislative Information:

U.S. Congressional District Numbers  
1

U.S. Congressional Representatives  
District #1: Jack Bergman

State Senate District Numbers  
37

State Senators  
District #37: Wayne Schmidt

**Submit Profile** ← Click here to **submit** Annual Profile

**Profile Cancelled** ← Click here to **cancel** Annual Profile

< Previous Form

## Accessing the Annual Profile Review

If you need to return to the Annual Profile Review after leaving, scroll through My Tasks on the IGX home screen. Select the document link on the left-hand side.

**MSHDA**  
MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

MSHDA Grants System

Home Searches - 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

Name	Document Type	Organization	Status	Status Date	Due Date
<b>APR-2022-4550-04</b>	Annual Profile Review	Organization	Profile in Progress	8/5/2022 11:03:19 AM	
DPA-4550-789 Test	DPA Activity	Organization	Activity Approved/Closeout Required	7/18/2022 11:16:34 AM	
HDF-2022-4550-	Habitat For	Organization	Grant Executed	7/8/2022	

#### My Opportunities

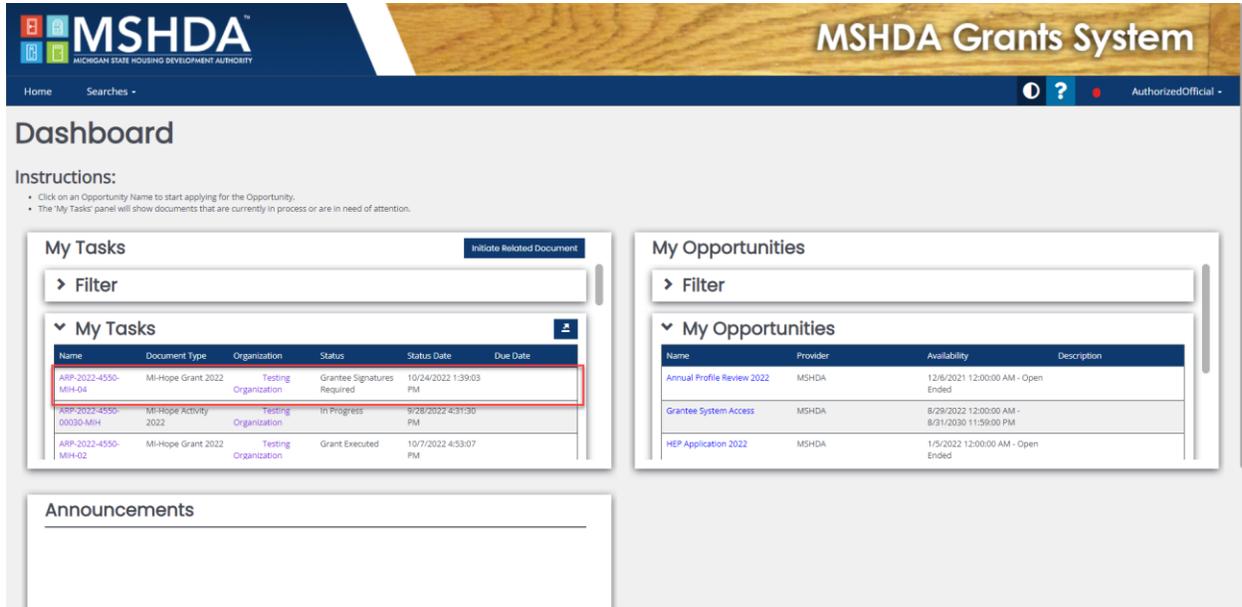
Name	Provider	Availability	Description
Annual Profile Review 2022	MSHDA	12/6/2021 12:00:00 AM - Open Ended	
HEP Application 2022	MSHDA	1/5/2022 12:00:00 AM - Open Ended	
HEP HUD Application 2022	MSHDA	2/16/2022 12:00:00 AM - Open Ended	

#### Announcements

# Signing the Grant Contract

## Grantee Signatures Required

The Authorized Official will log into the IGX system and go to the grant that needs to be signed. Once the grant is ready to be signed, it will be under My Tasks. Click the grant number to go to the grant.



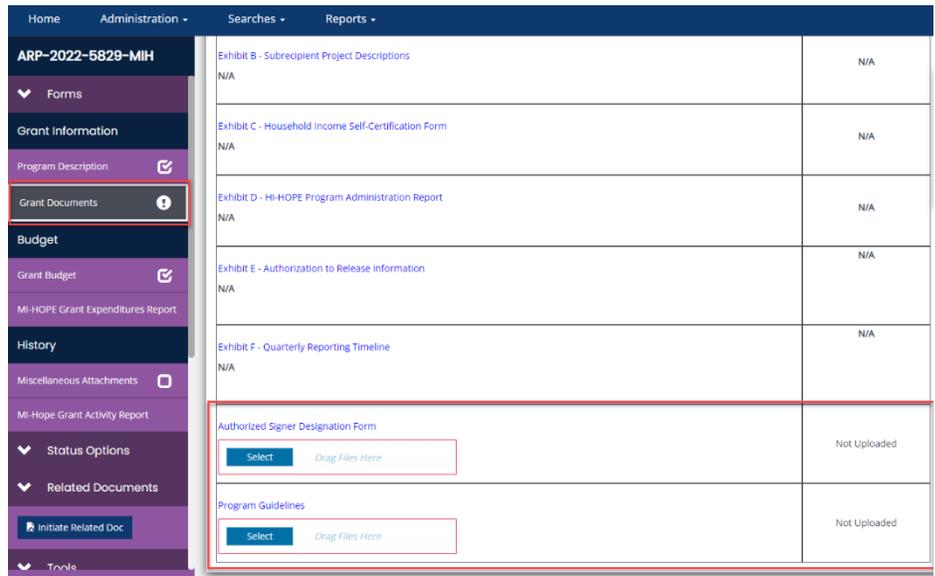
Click Grant Document on the Left-hand side of the screen to go to the Grant Document Screen. Each of the documents can be viewed using the hyperlink for that document. Documents with an upload box require an upload, the required documents depend on the type of agency submitting the grant.

### Non-Profit

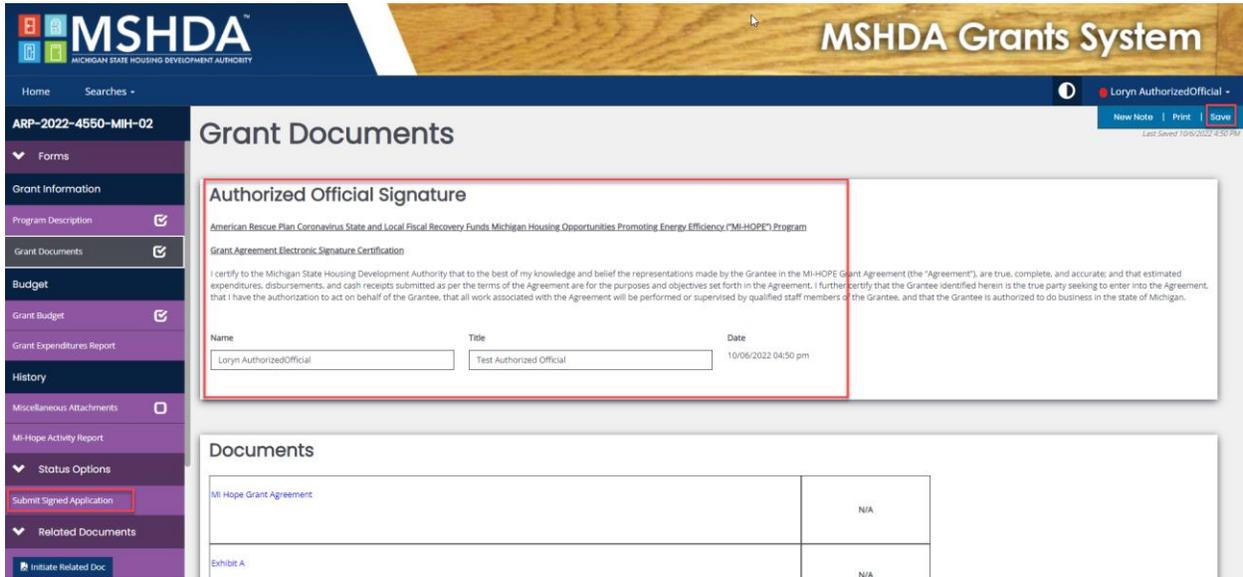
- Certified Board Resolution
- Grant Closing Statement
- Program Guidelines

### Local Unit of Government

- Authorized Signer Designation Form
- Program Guidelines



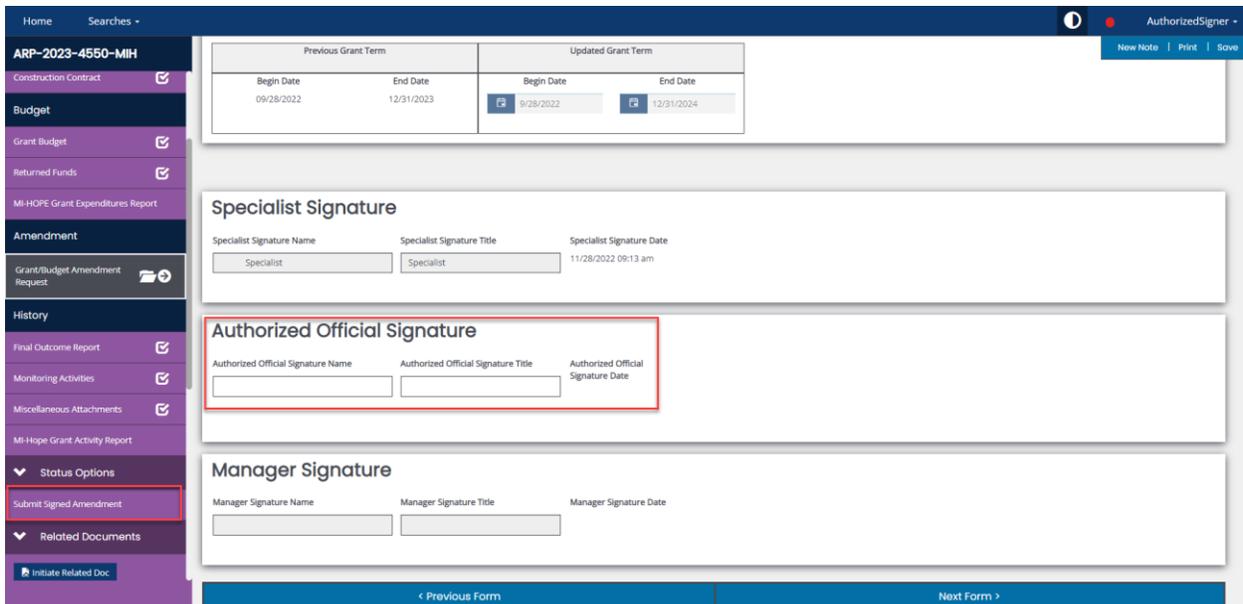
After uploading the attachments, the Authorized Official will scroll up and enter their name and Title to sign the agreement. If the name entered doesn't match the User Profile, they will not be able to sign the agreement. Then click Save. Once it is signed, they will click Submit Signed Application on the left-hand side of the screen under Status Options followed by the OK button on the pop-up.



## Amendments

### Amendment Grantee Signatures Required

Your Champion will complete the amendment in the system. Once the amended contract is ready to be signed the grantees Authorized Signer or Authorized Official will log into IGX system and go to the grant. Click Grant/Budget Amendment Request to go to the amendment. Check to make sure that everything is correct. Enter your name and title at the bottom of the page then save to sign the amendment. Click Submit Signed Amendment to send it back to MSHDA.



## Amended Contract

The amendment contract with signatures included can be found under Grant/Budget Amendment Request once it's been signed.

MSHDA Grants System

Home Administration Searches Reports Loryn Manager

ARP-2022-4550-MIH-02

Construction Contract

Budget

Grant Budget

Returned Funds

Grant Expenditures Report

Amendment

Grant/Budget Amendment Request

History

Final Outcome Report

Monitoring Activities

Manager Closeout Override

Miscellaneous Attachments

MI-Hope Activity Report

### Grant/Budget Amendment Request

Instructions:

- Select the appropriate checkboxes, and explain the reason for the amendment in the text area below the checkboxes. Click Save.
- Additional sections may appear for editing depending on what type of amendment was selected. Once all sections are complete, click Save.
- To add a new Amendment Request, the grant must be in status Amendment Request in Progress.
- Select the highest number in the dropdown list and click Go to complete the new blank page. NOTE: You will not be able to edit previous Amendment Requests.

#### Selections

- Change Grant Term
- Change Program Description
- Change Budget
- Change Grant Number/Funding Source Year

Describe the reason for the amendment

This amendment will extend the grant term and increase the budget.

Amendment Documents

## Construction Contracts

The **Authorized Signer** or **Agency Administrator** will log into IGX and go to the MI-HOPE grant either using MY Tasks or the Search menu. To use the Search Option, Click Search, then Grants. Enter MI-HOPE Grant for the Type and the organizations name under Organization. Click Search. Click the grant number to take you to the grant.

MSHDA Grants System

Home Searches AuthorizedSigner

Grants

Activities

Annual Profile Review

Applications

Grants

Instructions

- Fill out the form and click Search to show all your documents.
- Leave the search field blank to search for a specific document.

### Document Search

Name

Sub Code

Type

MI-Hope Grant 2022

Status

Organization

Person

Clear Search

Click Construction Contract on the left-hand menu to add a contract. Complete the form including the Contract name, Contract Amount, number of Units, Contract Number. You will also need to upload the contract, Contractor/Subcontractor License, and Contractor/Subcontractor Insurance. If you need to add more than 1 License or Insurance document, click the + mark at the end of the line to add another line. If you have a contract that covers more than 1 house, you can upload it once and enter the number of houses the contract covers under units. Click Save in the top right-hand corner of the screen to save.

To add another contract, click the + mark at the top right of the form.

Once a contract is uploaded do not delete it. If there is a change order, upload a new contract with revision included after the contract number. Example: 1-Revision.

The screenshot shows the 'Construction Contract' form in the MSHDA Grants System. The form is titled 'Construction Contract' and includes a warning: 'Once a contract is uploaded, DO NOT DELETE! If there is a change order, upload a new contract with revision included after the contract #. Example: 1-Revision.' The form has several sections: 'Contracts' with fields for Contract Name, Contract Amount, and Units; 'Contract Number'; 'Contract' with a 'Select' button and 'Drag Files Here' text; 'Contractor/Subcontractor License' with a 'Select' button, 'Drag Files Here' text, and a '+' button; and 'Contractor/Subcontractor Insurance' with a 'Select' button, 'Drag Files Here' text, and a '+' button. A 'Save' button is located in the top right corner of the form area.

## Activities

### Activity Form

The **Authorized Official, Agency Administrator, or Authorized Signer** will log into IGX and go to the MI-HOPE grant either using MY Tasks or the Search menu. To use the Search Option, Click Search, then Grants. Enter MI-HOPE Grant for the Type and the organizations name under Organization. Click Search. Click the grant number to take you to the grant.

The screenshot shows the search interface in the MSHDA Grants System. The 'Searches' dropdown menu is open, showing options like 'Activities', 'Annual Profile Review', 'Applications', and 'Grants'. The 'Grants' option is selected. Below the dropdown is the 'Document Search' form, which includes fields for Name, Sub Code, Type (set to 'MI-Hope Grant 2022'), Organization, Status, and Person. A 'Search' button is located at the bottom right of the form.

Click Initiate Related Doc from the lefthand menu.

MSHDA Grants System

Document Landing Page

Instructions:  
• View document details.

Template	Instance	Process
MI-HOPE Grant 2022	MI-Hope Grant 2022	Grant
Document Name	Document Status	
ARP-2023-4550-MIH	Grant Executed	
Organization	Your Role	
Testing Organization	Authorized Signer	

Initiate Related Doc

Select MI-HOPE Activity from the Available Document dropdown and click Create.

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  
ARP-2023-4550-MIH

Available Documents  
MI-Hope Activity 2022

Create

Click Activity Form on the left-hand menu. Complete the Activity Form. Save using the Save button at the top right-hand corner of the screen. Using the left-hand menu click Submit Activity to send it to your Champion or Cancel Activity to cancel it.

Home Searches - ARP-2022-4550-00053-MIH AuthorizedOfficial -  
New Note | Print | Save

### Activity Form

#### Activity Data Capture

Date Requested

Homeowner Name

Address City State Zip County  
Michigan

This is a homeowner Occupied Property  
 This is a Tenant Occupied Property

Activity Category Requested

Energy Efficiency Homeowner	\$	0
Energy Efficiency Rental	\$	0
Emergency Repair	\$	0

Total Requested \$0.00

Complete for each individual living in the housing unit. Select all that apply:

When you get to the contract section you will need to select one of the contracts created under Construction Contracts. Use the drop down to select the contract. If you need to add another contract to this activity you can click the + mark to add another line. If the contract for this house is not listed, you will need to add the contract using [Construction Contracts](#) to add it before completing the Activity. You're Champion will check the box confirming that the contract is correct. MSHDA will review the contracts in the Contract Section and will return the Activity for modification if problems are found.

### Contract Section

Contract Name

I CONFIRM AUTHORIZATION THE CONTRACT ADDRESS AND AMOUNT UNDER CONTRACT IS CORRECT.

## Financial Status Reports (FSR)

The **Authorized Official or Authorized Signer** log into IGX and go to the MI-HOPE grant either using MY Tasks or the Search menu. To use the Search Option, Click Search, then Grants. Enter MI-HOPE Grant for the Type and the organizations name under Organization. Click Search. Click the grant number to take you to the grant.

The screenshot shows the MSHDA Grants System search page. The header includes the MSHDA logo and 'MSHDA Grants System'. A navigation menu has 'Searches' highlighted. A dropdown menu is open under 'Searches', with 'Grants' selected. The 'Document Search' form has the following fields: Name, Sub Code, Type (set to 'MI-Hope Grant 2022'), Status, Organization, and Person. A 'Search' button is highlighted with a red box.

Click Initiate Related Doc from the lefthand menu.

The screenshot shows the 'Document Landing Page' for an 'MI-HOPE Grant 2022'. The left-hand menu has 'Initiate Related Doc' highlighted with a red box. The main content area shows 'Instructions' and a table with the following data:

Template	Instance	Process
MI-HOPE Grant 2022	MI-Hope Grant 2022	Grant
Document Name	Document Status	
ARP-2023-4550-MIH	Grant Executed	
Organization	Your Role	
Testing Organization	Authorized Signer	

Select MI-HOPE FSR from the Available Document dropdown and click Create.

The screenshot shows the 'Initiate Related Document' dialog box. It contains the following fields and instructions:

**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: ARP-2023-4550-MIH

Available Documents: MI-HOPE FSR 2022

**Create**

To complete the FSR you will need to complete the following sections.

- Select the radio button determining if this is the final FSR or not.
- Fill in the Current Report Period. This should encompass all the dates on the invoices in the FSR.
- Complete the Expense Detail section for each house included in this FSR. If you need to include more than one line, click the + button at the end of the Expense Detail line.
  - Budget Category-Use the drop down to choose MI-HOPE or admin.
  - Address-Enter the address.
  - Activity-Use the drop down to select the MI-HOPE eligible activity.
  - Description-Enter a description for the MI-HOPE eligible activity.
  - Total Amount of Invoice-Enter the total amount of the invoice, including money that will not be covered by the MSDHA grant.
  - Amount Billed to MSHDA-This should include only the amount of the amount of the invoice that will be billed to MSHDA.
  - Supporting Documentation-Upload the invoice(s).

The FSR can be cancelled or submitted by the **Authorized Official or Authorized Signer** using the Cancel FSR or Submit FSR on the left-hand menu. After the FSR is submitted, it will be reviewed by the Specialist, Manager, and Director within MSHDA. If errors are found, the FSR will be returned for modifications.

**MSHDA** MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

**MSHDA Grants System**

Home Searches - AuthorizedSigner - New Note | Print | Save

### Financial Status Report/Payment Request

ARP-2022-4550-MIH-03 FSR #1

Forms

Financial Status Report/Payment Request

Status Options

Cancel FSR

Submit FSR

Related Documents

Initiate Related Doc

Grant

Tools

Landing Page

Add/Edit People

Status History

Attachment Repository

Modification Summary

Document Validation

Notes

Print Document

Document Messages

#### Report Information

Final Report:  Yes  No

Current Report Period: From  To

Check Date:

Check #:

Check Amount: \$0

#### Expense Summary

Budget Categories	Approved Budget	Previous Expenditures	Returned Funds	This Period Expenditures	Total Expenditures	Current Balance
MI-HOPE Activities	\$500,000.00	\$0	\$0	\$0.00	\$0.00	\$500,000.00
Administrative Costs	\$50,000.00	\$0	\$0	\$0.00	\$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

Cash on Hand \$0.00

**TOTAL PAYMENT REQUESTED \$0.00**

#### 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"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="\$"/>	<input type="text" value="\$"/>	<input type="button" value="Select"/> <input type="text" value="Drag Files Here"/> <input type="button" value="+"/>

## Returning to an FSR in Progress

Log into IGX and go to the MI-HOPE grant either using MY Tasks or the Search menu. To use the Search Option, Click Search, then Grants. Enter MI-HOPE Grant for the Type and the organizations name under Organization. Click Search. Click the grant number to take you to the grant.

MSHDA Grants System

Home | Searches | AuthorizedSigner

Grants

Document Search

Name:

Type:

Organization:

Sub Code:

Status:

Person:

Clear | Search

Scroll the lefthand menu down and click Financial Status Report.

MSHDA Grants System

Home | Searches | AuthorizedSigner

Document Landing Page

Instructions:

- View document details.

Template	Instance	Process
MI-HOPE Grant 2022	MI-HOPE Grant 2022	Grant
Document Name	Document Status	
ARP-2023-4550-MIH	Grant Executed	
Organization	Your Role	
Testing Organization	Authorized Signer	

Financial Status Report

# Final Outcome Report

The Final Outcome Report is used to close out the grant after all funds have been spent and the grant term is over.

The **Authorized Signer, Agency Administrator, or Authorized Official** will log into IGX and go to the MI-HOPE grant either using MY Tasks or the Search menu. To use the Search Option, Click Search, then Grants. Enter MI-HOPE Grant for the Type and the organizations name under Organization. Click Search. Click the grant number to take you to the grant.

Click Final Outcome Report on the left-hand menu to get to the Final Outcome Report. Complete the report including the Leveraged Funds Summary, Photos, Survey, and Home Energy Measurables of Cost Savings. Save the form using the Save button at the top right-hand corner of the screen.

