

Generic Grant IGX System Guide-Grantees

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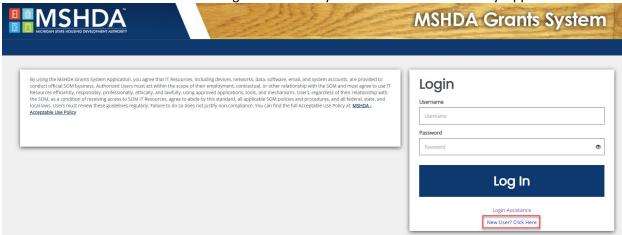
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MSHDA grants are managed using the MSHDA Grants System in IGX.

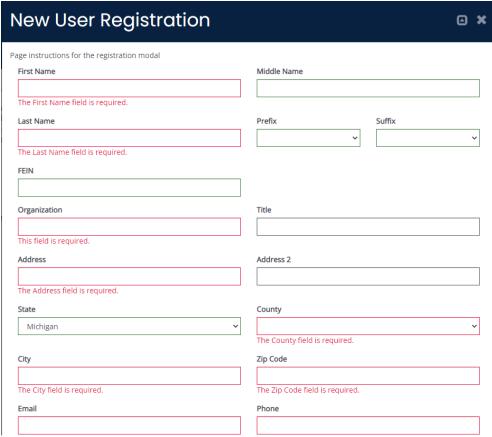
System Access

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.



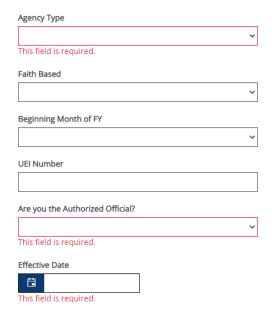
Complete the New User Registration form. The fields shown here in red are required. The organization should be the name of the organization the user wants to register under.



New 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).

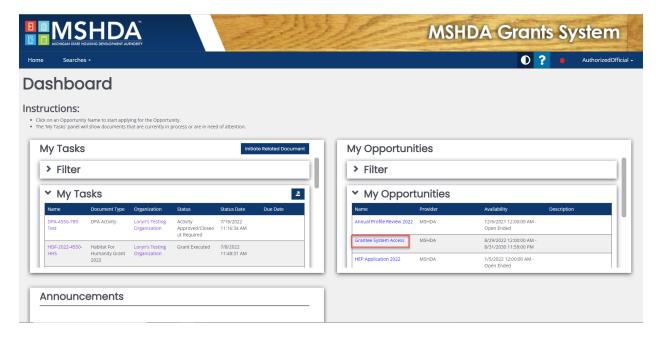
Phone 2	Fax
Cell Phone	Website
Username	
The Username field is required.	
Password	Verify Password
The Password field is required.	The Verify Password field is required.
Description of user/access being requested	
This field is required.	
Request Type	
System Type	
~	
This field is required.	
Existing Org Number	



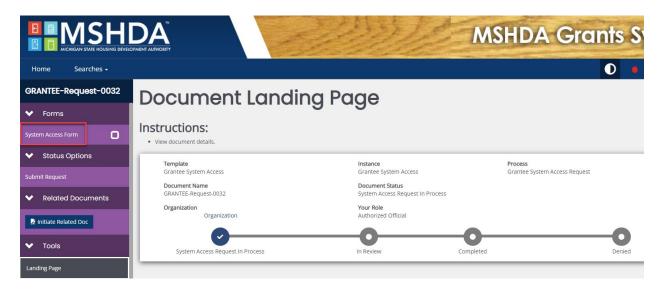
The UEI is the Unique Entity Identifier obtained by agencies from SAM.gov. The effective date is the date the profile should start. When the New User Registration Form is complete, click Register.

Adding/Changing User Profiles

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.



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.



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.

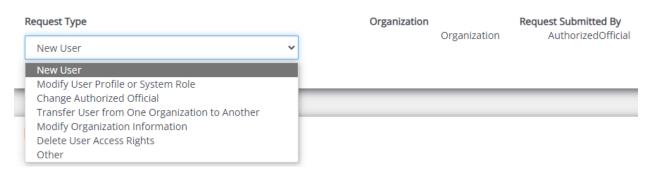
Transfer User from One Organization to Another: this will request to move a user to a new organization.

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



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

User First Name	User Last Name		
User Email		User Phone	User Fax
User Access Level	V		
	er Inactive Date		
User Description of request			

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

Role to change existing Authorized Official to Who is the new Authorized Official?	
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 organizatio	n? 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

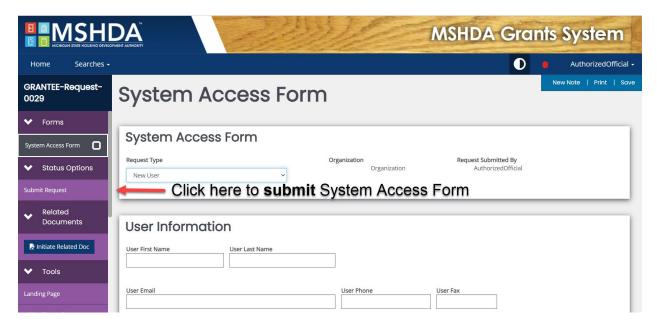
Agency Type			
v v	•		
Agency Name	٦		
AAdd	A	A7i-	A
Agency Address	Agency City	Agency Zip	Agency County
Agency Phone	Agency Fax		
Federal ID Number			
Faith Based			
Beginning Month of FY			
January V UEI Number			
Please include a description in writing of the change			
Other Changes			

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			
	-/-		

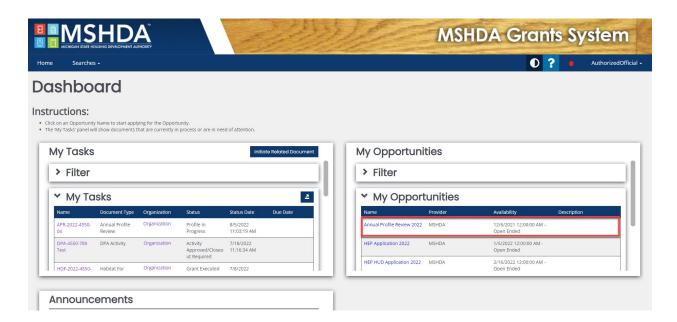
Once the System Access Form has been completed with no errors, the **Authorized Official** can submit. Select Submit Request under Status Options on the left-hand side of the screen.



Annual Profile Review

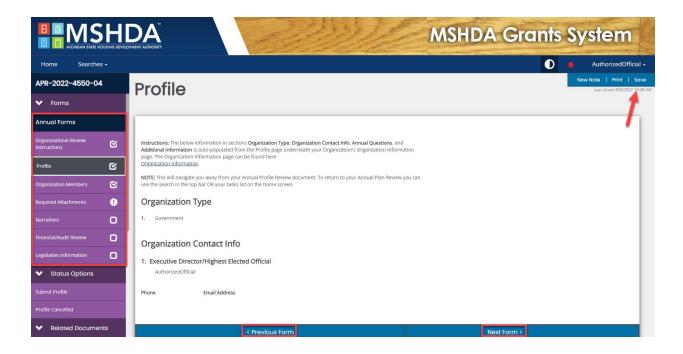
Initiating the Annual Profile Review

The **Authorized Official or Agency Administrator** 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.



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 all 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 yet. 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

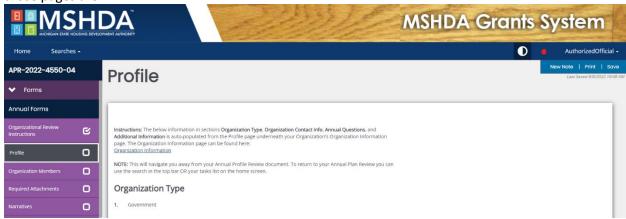
This document pulls data from your Organization's Information pages. Specifically, the "Organization Profile", "Required Documents", "Organization Members", and "Legislative Information" pages. Before starting this document, you must save these pages within your Organization's Information Pages.

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.

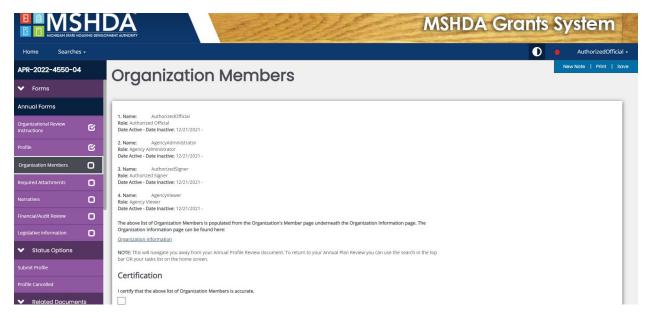
NOTE: Once you've filled out the organization pages you must return to the Annual Profile Review using the Annual Profile Review Search in the top bar OR your Tasks list on the home screen. Then, save this page and if all 3 pages attached to your organization have been completed without errors, the rest 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. If you are a new organization, you will have to complete all organization information pages before moving on to the Annual Profile Review. I'm thinking we might have to show them what those pages are.

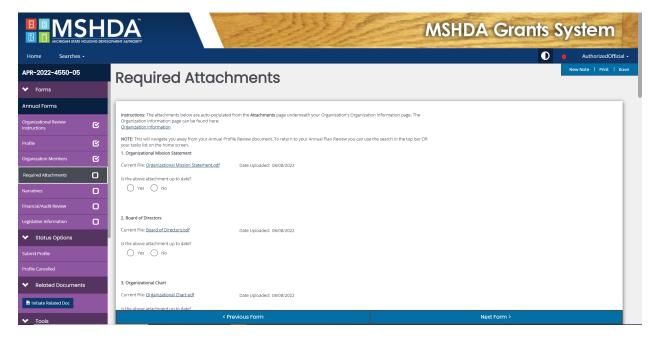


The Organization Members page lists the members of your organization who are listed as active in the system. Check to ensure that this list is correct. Go to the Organizational Information page to update the list if changes need to be made. When the list is correct, check the box certifying that the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

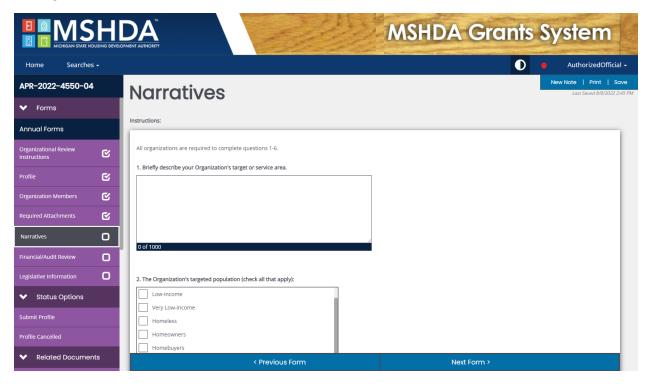


The attachments on the Required Attachments form are auto populated from the Attachments page within your Organization Information page.

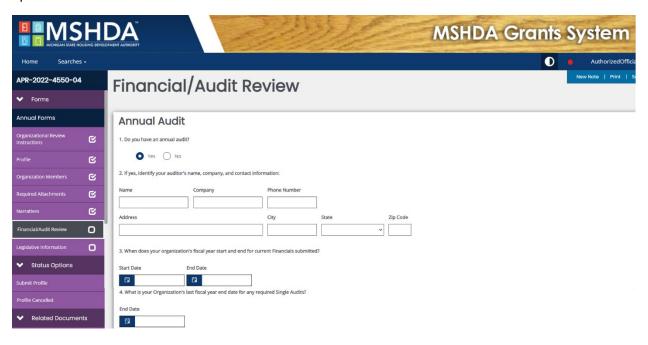
Check to make sure that each attachment is up to date. If the attachment is up to date, select yes. If the attachment is not up to date, you will need to go to the Organizational Information page to upload the new file.



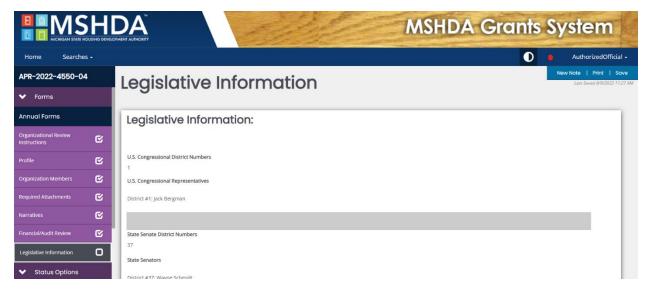
The Narrative form asks questions about the organization including your target population, service area, staffing, and local services.



The Financial Information form asks about annual audits, auditors, annual financial statements, single audits, and the organizations budget. Please make sure your most recent financial information is uploaded.

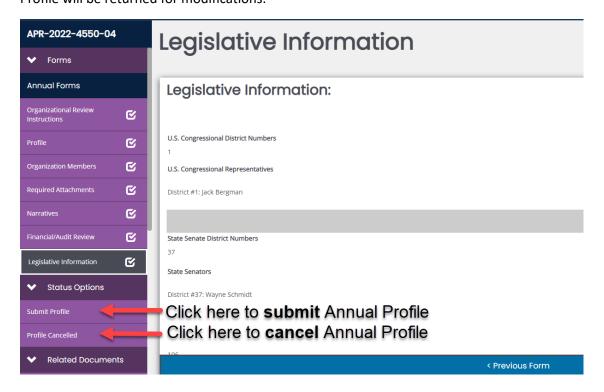


The Legislative Information form is auto filled from the Organizational Information page. Check to ensure that the US Congressional Districts, State Senate Districts, and State House of Representative Districts for your organization are correct. Certify that the data is up to date and accurate at the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



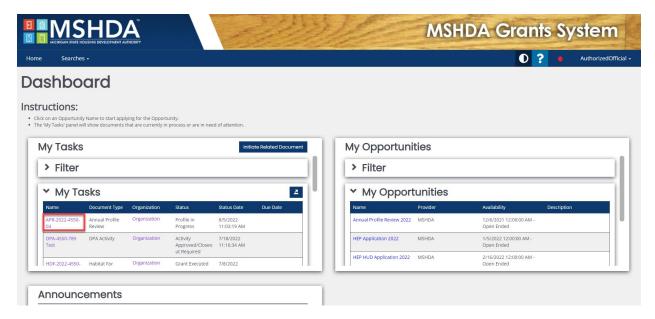
Submitting the Annual Profile Review

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.



Accessing the Annual Profile Review

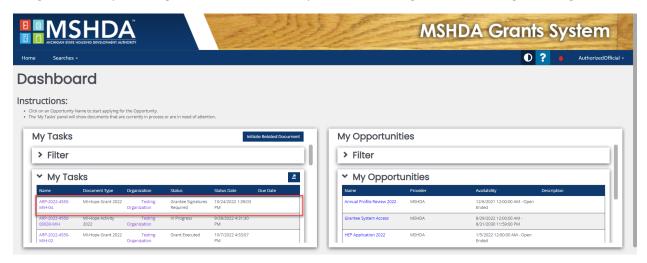
If you need to return to the Annual Profile Review after leaving, scroll through MY Tasks on the IGX home screen. Select the document link on the left-hand side.



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.



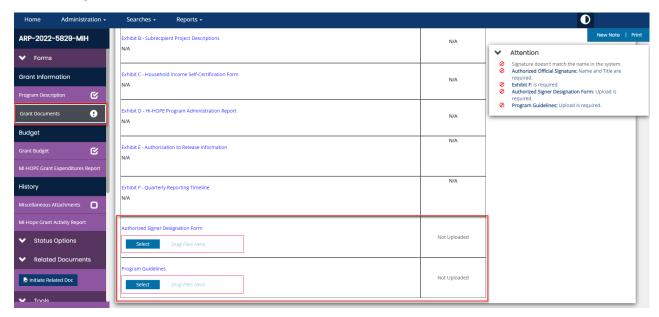
Click Grant Document on the Left-hand side of the screen to go to the Grant Document Screen. Each of the documents can be viewed using the hyperlink for that document. Documents with an upload box require an upload, the required documents depend on the type of agency submitting the grant.

Non-Profit

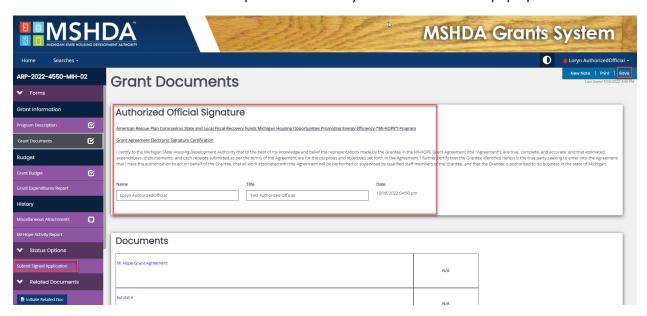
- Certified Board Resolution
- Grant Closing Statement
- Program Guidelines

Local Unit of Government

- Authorized Signer Designation Form
- Program Guidelines



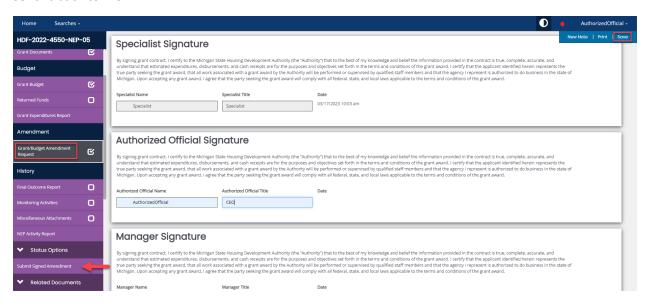
After uploading the attachments, the **Authorized Official** will scroll up and enter their name and Title to sign the agreement. If the name entered doesn't match the User Profile, they will not be able to sign the agreement. Then click Save. Once it is signed, they will click Submit Signed Application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



Amendments

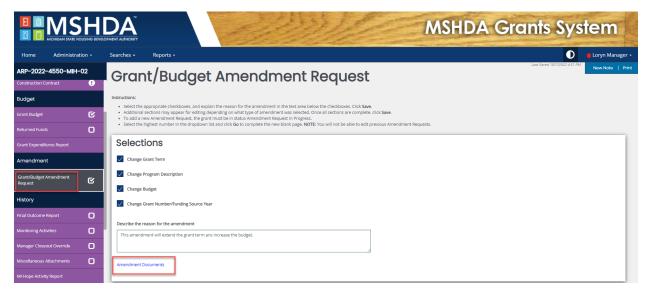
Amendment Grantee Signatures Required

MSHDA will complete the amendment in the system. Once the amended contract is ready to be signed the grantee's **Authorized Official** will log into IGX system and go to the grant. Click Grant 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. The Authorized Official's name must be entered exactly as it is in the system, or you will get an error. Click Submit Signed Amendment to send it back to MSHDA.



Amended Contract

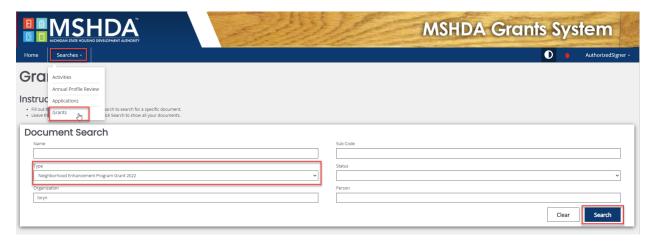
The amendment contract with signatures included can be found under Grant Amendment Request once it's been signed.



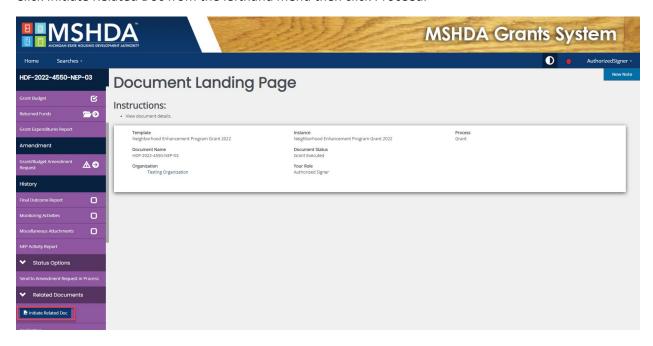
Financial Status Reports (FSR)

Creating an FSR

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



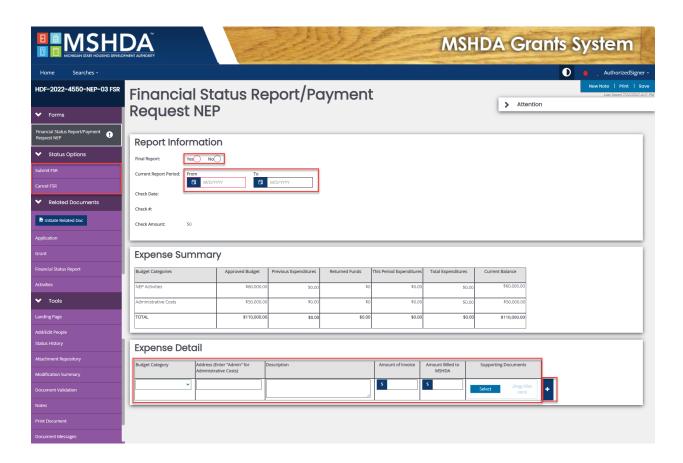
Click Initiate Related Doc from the lefthand menu then click Proceed.



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

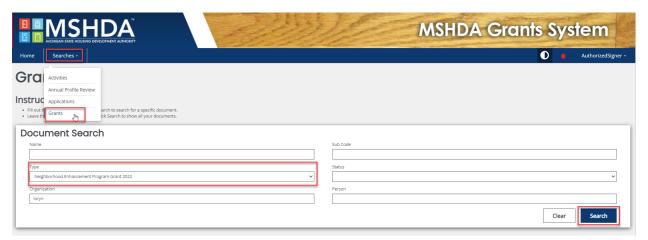
- ☐ Select the radio button determining if this is the final FSR or not.
- ☐ Fill in the Current Report Period. This should encompass all the dates on the invoices in the FSR and must be within the term of the grant agreement.
- ☐ Complete the Expense Detail section for each activity included in this 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 they type of activity.
 - Address-Enter the address, enter Admin for Administrative Costs.
 - Activity-Enter the activity.
 - Description-Enter a description for the eligible activity.
 - Total Amount of Invoice-Enter the total amount of the invoice, including money that will not be covered by the MSHDA grant.
 - Amount Billed to MSHDA-This should include only 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 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.

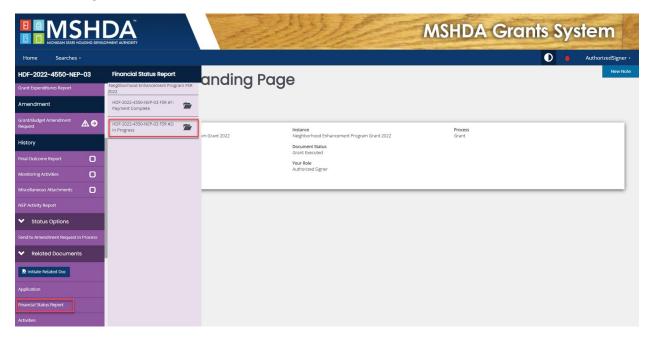


Returning to an FSR in Progress

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



Scroll the lefthand menu down and click Financial Status Report, this will show a dropdown list of the FSRs for this grant.



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 grant either using MY Tasks or the Search menu. To use the Search Option, Click Search, then Grants. Enter the grant name 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 contact information for the person completing the report. Check the boxes for the sections of the Final Outcome Report that MSHDA has told you not to complete. Save the form using the Save button at the top right-hand corner of the screen.

