



NEP IGX System Guide-Grantees

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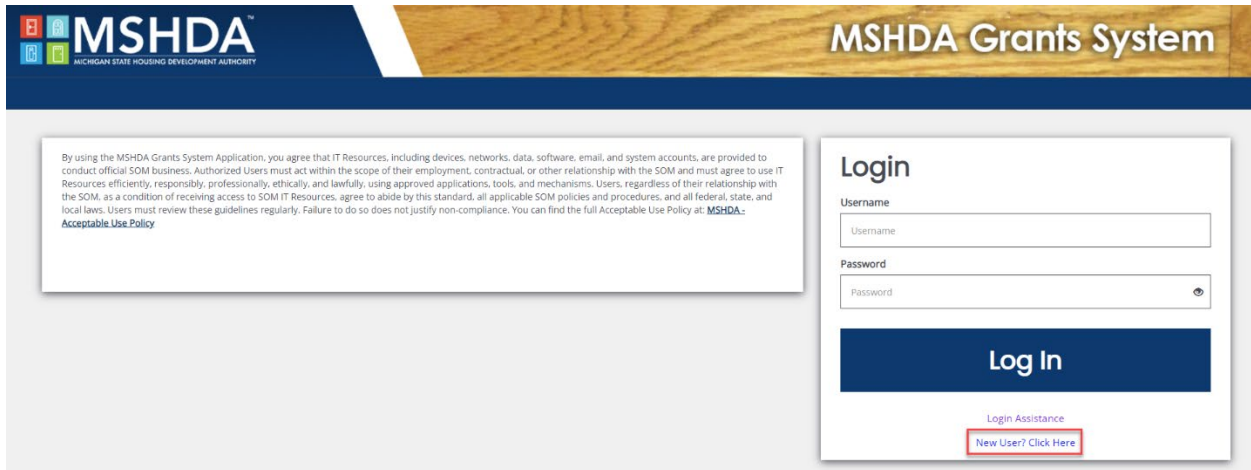
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The NEP grant is managed using the [MSHDA Grants System](#) in IGX.

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.



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

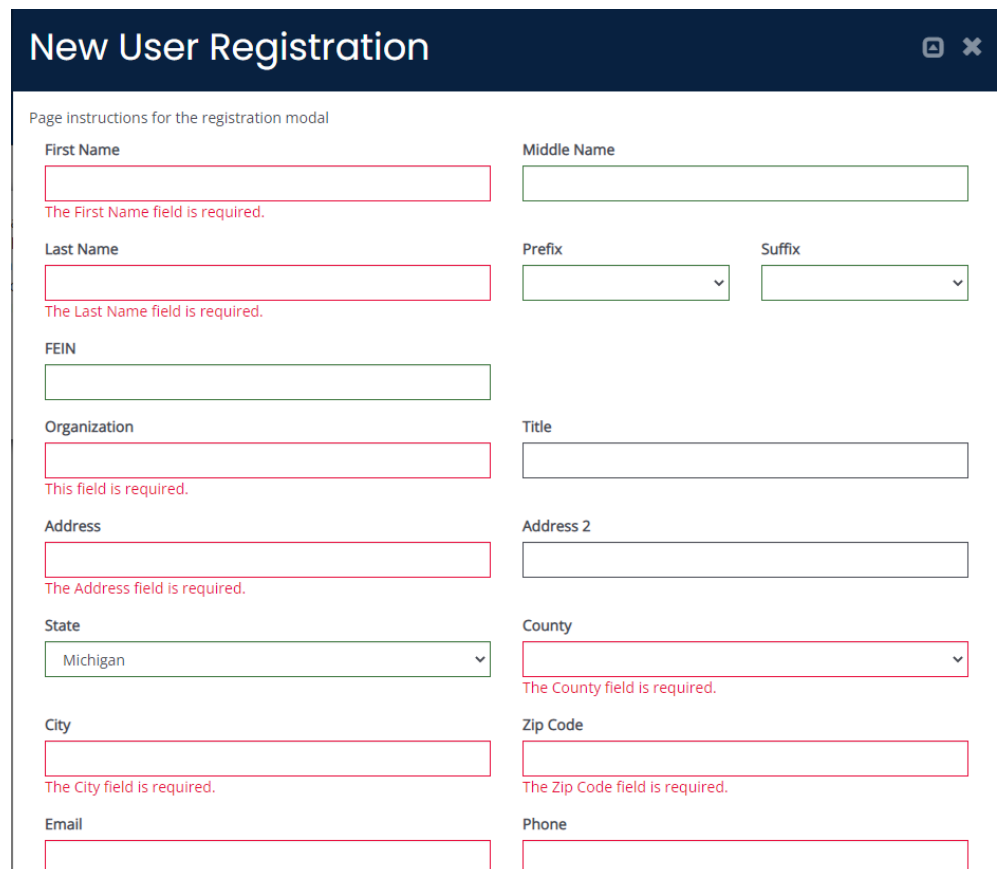
Username
Username

Password
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
Prefix

Suffix
Suffix

FEIN

Organization
This field is required.

Title

Address
The Address field is required.

Address 2

State
Michigan

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 <input type="text"/>	Fax <input type="text"/>
Cell Phone <input type="text"/>	Website <input type="text"/>
Username <input type="text"/> <small>The Username field is required.</small>	
Password <input type="text"/> <small>The Password field is required.</small>	Verify Password <input type="text"/> <small>The Verify Password field is required.</small>
Description of user/access being requested <input type="text"/> <small>This field is required.</small>	
Request Type <input type="text"/>	
System Type <input type="text"/> <small>This field is required.</small>	
Existing Org Number <input type="text"/>	Agency Type <input type="text"/> <small>This field is required.</small>
	Faith Based <input type="text"/>
	Beginning Month of FY <input type="text"/>
	UEI Number <input type="text"/>
	Are you the Authorized Official? <input type="text"/> <small>This field is required.</small>
	Effective Date <input type="text"/> <small>This field is required.</small>

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.

MSHDA MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

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

Name	Document Type	Organization	Status	Status Date	Due Date
DPA-4550-789 Test	DPA Activity	Loryn's Testing Organization	Activity Approved/Closed out 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

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 - 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 MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

Home Searches - **AuthorizedOfficial**

Document Landing Page

GRANTEE-Request-0032

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

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

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 displays the 'System Access Form' interface. On the left, a 'Request Type' dropdown menu is open, showing seven options: 'New User' (selected), 'Modify User Profile or System Role', 'Change Authorized Official', 'Transfer User from One Organization to Another', 'Modify Organization Information', 'Delete User Access Rights', and 'Other'. To the right of the dropdown, there are three input fields: 'Organization' (with a placeholder 'Organization'), 'Organization' (with a placeholder 'Organization'), and 'Request Submitted By' (with a placeholder 'AuthorizedOfficial'). A horizontal grey bar is positioned below these fields.

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	
<input type="text"/>	<input type="text"/>	
User Email	User Phone	User Fax
<input type="text"/>	<input type="text"/>	<input type="text"/>
User Access Level		
<input type="text"/>		
User Active Date	User Inactive Date	
<input type="text"/>	<input type="text"/>	
User Description of request		
<input type="text"/>		

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

Home Searches

MSHDA Grants System

Authorized Official

New Note | Print | Save

GRANTEE-Request-0029

System Access Form

Request Type: New User

Organization: Organization

Request Submitted By: Authorized Official

Click here to submit System Access Form

User Information

User First Name: [Text Box] User Last Name: [Text Box]

User Email: [Text Box] User Phone: [Text Box] User Fax: [Text Box]

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.

MSHDA
MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

Home Searches

MSHDA Grants System

Authorized Official

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

Filter

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	
HOF-2022-4550-	Habitat For	Organization	Grant Executed	7/8/2022	

My Opportunities

Filter

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 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.

The screenshot displays the MSHDA Grants System interface. The top header features the MSHDA logo and the text "MSHDA Grants System". Below the header, a navigation bar includes "Home", "Searches", and a user profile dropdown for "AuthorizedOfficial". The left sidebar contains a menu with sections: "Forms" (expanded), "Status Options", and "Related Documents". Under "Forms", the "Annual Forms" section is highlighted, showing a list of forms: "Organizational Review Instructions" (checked), "Profile" (checked), "Organization Members" (checked), "Required Attachments" (exclamation mark), "Narratives" (empty square), "Financial/Audit Review" (empty square), and "Legislative Information" (empty square). The main content area is titled "Profile" and contains instructions, a note, and sections for "Organization Type" (1. Government) and "Organization Contact Info" (1. Executive Director/Highest Elected Official). The contact info section includes fields for "AuthorizedOfficial", "Phone", and "Email Address". At the bottom of the form, there are buttons for "< Previous Form" and "Next Form >". A red arrow points to the "Save" button in the top right corner of the form area.

MSHDA
MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

MSHDA Grants System

Home Searches AuthorizedOfficial

APR-2022-4550-04

Profile

New Note | Print | Save
Last Saved 8/8/2022 10:48 AM

Forms

Annual Forms

Organizational Review Instructions ☒

Profile ☒

Organization Members ☒

Required Attachments ☐

Narratives ☐

Financial/Audit Review ☐

Legislative Information ☐

Status Options

Submit Profile

Profile Cancelled

Related Documents

Instructions: The below information in sections **Organization Type**, **Organization Contact Info**, **Annual Questions**, and **Additional Information** is auto-populated from the Profile page underneath your Organization's Organization Information page. The Organization Information page can be found here: [Organization Information](#)

NOTE: This will navigate you away from your Annual Profile Review document. To return to your Annual Plan Review you can use the search in the top bar OR your tasks list on the home screen.

Organization Type

1. Government

Organization Contact Info

1. Executive Director/Highest Elected Official

AuthorizedOfficial

Phone Email Address

< Previous Form Next Form >

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 screenshot shows the MSHDA Grants System interface. The header includes the MSHDA logo and the text 'MSHDA Grants System'. The left sidebar shows a menu with 'Forms' expanded, listing 'Annual Forms' and 'Organizational Review Instructions' (which is selected). The main content area is titled 'Organizational Review Instructions' and contains the following text:

Instructions

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 fill out these pages that are attached to your Agency's Organization Information screen.

If this page is the only page that you currently see in this document, 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.

[Organization Information](#)

NOTE: Once you've filled out the organization pages you must return to this page 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 complete without errors the rest of the Annual Profile Review pages will appear in the left nav.

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 screenshot shows the MSHDA Grants System interface. The header includes the MSHDA logo and the text 'MSHDA Grants System'. The left sidebar shows a menu with 'Forms' expanded, listing 'Annual Forms' and 'Organizational Review Instructions' (which is selected). The main content area is titled 'Profile' and contains the following text:

Instructions: The below information in sections **Organization Type**, **Organization Contact Info**, **Annual Questions**, and **Additional Information** is auto-populated from the Profile page underneath your Organization's Organization Information page. The Organization Information page can be found here: [Organization Information](#)

NOTE: This will navigate you away from your Annual Profile Review document. To return to your Annual Plan Review you can use the search in the top bar OR your tasks list on the home screen.

Organization Type

1. Government

Organization Contact Info

1. Executive Director/Highest Elected Official

AuthorizedOfficial

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.

MSHDA MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

MSHDA Grants System

Home Searches - AuthorizedOfficial - New Note | Print | Save

APR-2022-4550-04

Forms

Annual Forms

Organizational Review Instructions

Profile

Organization Members

Required Attachments

Narratives

Financial/Audit Review

Legislative Information

Status Options

Submit Profile

Profile Cancelled

Related Documents

Organization Members

1. Name: AuthorizedOfficial
Role: Authorized Official
Date Active - Date Inactive: 12/21/2021 -

2. Name: AgencyAdministrator
Role: Agency Administrator
Date Active - Date Inactive: 12/21/2021 -

3. Name: AuthorizedSigner
Role: Authorized Signer
Date Active - Date Inactive: 12/21/2021 -

4. Name: AgencyViewer
Role: Agency Viewer
Date Active - Date Inactive: 12/21/2021 -

The above list of Organization Members is populated from the Organization's Member page underneath the Organization Information page. The Organization Information page can be found here: [Organization Information](#)

NOTE: This will navigate you away from your Annual Profile Review document. To return to your Annual Plan Review you can use the search in the top bar OR your tasks list on the home screen.

Certification

I certify that the above 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.

MSHDA MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

MSHDA Grants System

Home Searches - AuthorizedOfficial - New Note | Print | Save

APR-2022-4550-05

Forms

Annual Forms

Organizational Review Instructions

Profile

Organization Members

Required Attachments

Narratives

Financial/Audit Review

Legislative Information

Status Options

Submit Profile

Profile Cancelled

Related Documents

Initiate Related Doc

Tools

Required Attachments

Instructions: The attachments below are auto-populated from the Attachments page underneath your Organization's Organization Information page. The Organization Information page can be found here: [Organization Information](#)

NOTE: This will navigate you away from your Annual Profile Review document. To return to your Annual Plan Review you can use the search in the top bar OR your tasks list on the home screen.

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?

< Previous Form Next Form >

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

The screenshot shows the MSHDA Grants System interface. The header includes the MSHDA logo and the text "MSHDA Grants System". The navigation bar shows "Home" and "Searches". The user is logged in as "AuthorizedOfficial". The left sidebar lists various forms, with "Narratives" selected. The main content area is titled "Narratives" and contains instructions: "All organizations are required to complete questions 1-6." The first question is "1. Briefly describe your Organization's target or service area." with a text input field. The second question is "2. The Organization's targeted population (check all that apply):" with checkboxes for "Low-income", "Very Low-income", "Homeless", "Homeowners", and "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. Please make sure your most recent financial information is uploaded.

The screenshot shows the MSHDA Grants System interface for the "Financial/Audit Review" form. The header includes the MSHDA logo and the text "MSHDA Grants System". The navigation bar shows "Home" and "Searches". The user is logged in as "AuthorizedOfficial". The left sidebar lists various forms, with "Financial/Audit Review" selected. The main content area is titled "Financial/Audit Review" and contains the "Annual Audit" section. The first question is "1. Do you have an annual audit?" with radio buttons for "Yes" and "No". The second question is "2. If yes, identify your auditor's name, company, and contact information:" with input fields for "Name", "Company", "Phone Number", "Address", "City", "State", and "Zip Code". The third question is "3. When does your organization's fiscal year start and end for current Financials submitted?" with date pickers for "Start Date" and "End Date". The fourth question is "4. What is your Organization's last fiscal year end date for any required Single Audits?" with a date picker for "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 MSHDA Grants System interface. The header includes the MSHDA logo and the text "MSHDA Grants System". The left sidebar contains a navigation menu with sections: "Forms" (with sub-items: Annual Forms, Organizational Review Instructions, Profile, Organization Members, Required Attachments, Narratives, Financial/Audit Review, Legislative Information), "Status Options" (with sub-items: Submit Profile, Profile Cancelled), and "Related Documents". The main content area is titled "Legislative Information" and contains the following fields: "U.S. Congressional District Numbers" (value: 1), "U.S. Congressional Representatives" (value: District #1: Jack Bergman), "State Senate District Numbers" (value: 37), "State Senators" (value: District #37: Wayne Schmidt), and "State House of Representatives District Numbers" (value: 105). At the bottom of the main content area is a button labeled "< Previous Form".

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.

This screenshot is similar to the one above but includes red arrows pointing to the "Submit Profile" and "Profile Cancelled" options in the "Status Options" section of the left sidebar. The main content area is the same "Legislative Information" form. The annotations are: "Click here to **submit** Annual Profile" pointing to "Submit Profile" and "Click here to **cancel** Annual Profile" pointing to "Profile Cancelled".

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

Home Searches AuthorizedOfficial

MSHDA Grants System

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
APR-2022-4550-04	Annual Profile Review	Organization	Profile in Progress	8/5/2022 11:03:19 AM	
OPA-4550-789	DPA Activity Test	Organization	Activity Approved/Closed/ut Required	7/18/2022 11:16:34 AM	
HDF-2022-4550-	Habitat For	Organization	Grant Executed	7/8/2022	

My Opportunities

Filter

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.

MSHDA
MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

Home Searches AuthorizedOfficial

MSHDA Grants System

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
ARP-2022-4550-MIH-04	Mi-Hope Grant 2022	Testing Organization	Grantee Signatures Required	10/24/2022 1:39:03 PM	
ARP-2022-4550-00030-MIH	Mi-Hope Activity 2022	Testing Organization	In Progress	9/28/2022 4:31:30 PM	
ARP-2022-4550-MIH-02	Mi-Hope Grant 2022	Testing Organization	Grant Executed	10/7/2022 4:53:07 PM	

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 - Open Ended	

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

Document Name	Status
Exhibit B - Subrecipient Project Descriptions	N/A
Exhibit C - Household Income Self-Certification Form	N/A
Exhibit D - MI-HOPE Program Administration Report	N/A
Exhibit E - Authorization to Release Information	N/A
Exhibit F - Quarterly Reporting Timeline	N/A
Authorized Signer Designation Form	Not Uploaded
Program Guidelines	Not Uploaded

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.

Authorized Official Signature

American Rescue Plan Coronavirus State and Local Fiscal Recovery Funds Michigan Housing Opportunities Promoting Energy Efficiency ("MI-HOPE") Program

Grant Agreement Electronic Signature Certification

I certify to the Michigan State Housing Development Authority that to the best of my knowledge and belief the representations made by the Grantee in the MI-HOPE Grant Agreement (the "Agreement"), are true, complete, and accurate; and that estimated expenditures, disbursements, and cash receipts submitted as per the terms of the Agreement are for the purposes and objectives set forth in the Agreement. I further certify that the Grantee identified herein is the true party seeking to enter into the Agreement, that I have the authorization to act on behalf of the Grantee, that all work associated with the Agreement will be performed or supervised by qualified staff members of the Grantee, and that the Grantee is authorized to do business in the state of Michigan.

Name: Loryn AuthorizedOfficial Title: Test Authorized Official Date: 10/06/2022 04:50 pm

Document Name	Status
MI Hope Grant Agreement	N/A
Exhibit A	N/A

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.

Home | Searches | AuthorizedOfficial

HDF-2022-4550-NEP-05

Grant Documents

Budget

Grant Budget

Returned Funds

Grant Expenditures Report

Amendment

Grant/Budget Amendment Request

History

Final Outcome Report

Monitoring Activities

Miscellaneous Attachments

NEP Activity Report

Status Options

Submit Signed Amendment

Related Documents

Specialist Signature

By signing grant contract, I certify to the Michigan State Housing Development Authority (the "Authority") that to the best of my knowledge and belief the information provided in the contract is true, complete, accurate, and understand that estimated expenditures, disbursements, and cash receipts are for the purposes and objectives set forth in the terms and conditions of the grant award. I certify that the applicant identified herein represents the true party seeking the grant award, that all work associated with a grant award by the Authority will be performed or supervised by qualified staff members and that the agency I represent is authorized to do business in the state of Michigan. Upon accepting any grant award, I agree that the party seeking the grant award will comply with all federal, state, and local laws applicable to the terms and conditions of the grant award.

Specialist Name: Specialist Title: Date: 03/17/2023 10:03 am

Authorized Official Signature

By signing grant contract, I certify to the Michigan State Housing Development Authority (the "Authority") that to the best of my knowledge and belief the information provided in the contract is true, complete, accurate, and understand that estimated expenditures, disbursements, and cash receipts are for the purposes and objectives set forth in the terms and conditions of the grant award. I certify that the applicant identified herein represents the true party seeking the grant award, that all work associated with a grant award by the Authority will be performed or supervised by qualified staff members and that the agency I represent is authorized to do business in the state of Michigan. Upon accepting any grant award, I agree that the party seeking the grant award will comply with all federal, state, and local laws applicable to the terms and conditions of the grant award.

Authorized Official Name: Authorized Official Title: Date:

Manager Signature

By signing grant contract, I certify to the Michigan State Housing Development Authority (the "Authority") that to the best of my knowledge and belief the information provided in the contract is true, complete, accurate, and understand that estimated expenditures, disbursements, and cash receipts are for the purposes and objectives set forth in the terms and conditions of the grant award. I certify that the applicant identified herein represents the true party seeking the grant award, that all work associated with a grant award by the Authority will be performed or supervised by qualified staff members and that the agency I represent is authorized to do business in the state of Michigan. Upon accepting any grant award, I agree that the party seeking the grant award will comply with all federal, state, and local laws applicable to the terms and conditions of the grant award.

Manager Name: Manager Title: Date:

Amended Contract

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

MSHDA MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

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

Activities

Activity Pre-Approval Form

The **Authorized Official, Agency Administrator, or Authorized Signer** will log into IGX and go to the NEP grant either using MY Tasks or the Search menu. To use the Search Option, Click Search, then Grants. Enter NEP 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 interface. The header includes the MSHDA logo and the title "MSHDA Grants System". A navigation bar contains "Home" and "Searches". A dropdown menu for "Searches" is open, showing options: "Activities", "Annual Profile Review", "Applications", and "Grants". The "Grants" option is highlighted. Below the menu is a "Document Search" form with fields for "Name", "Sub Code", "Type", "Status", "Organization", and "Person". The "Type" dropdown is set to "Neighborhood Enhancement Program Grant 2022". The "Search" button is highlighted with a red box.

Click Initiate Related Doc from the lefthand menu.

The screenshot shows the MSHDA Grants System interface. The header includes the MSHDA logo and the title "MSHDA Grants System". A navigation bar contains "Home" and "Searches". A dropdown menu for "Searches" is open, showing options: "Activities", "Annual Profile Review", "Applications", and "Grants". The "Grants" option is highlighted. Below the menu is a "Document Search" form with fields for "Name", "Sub Code", "Type", "Status", "Organization", and "Person". The "Type" dropdown is set to "Neighborhood Enhancement Program Grant 2022". The "Search" button is highlighted with a red box.

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Select NEP 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

HDF-2022-4550-NEP-05

Available Documents

NEP Activity

Create

Click Activity Pre-Approval Form on the left-hand menu. To complete the Activity Pre-Approval Form you will need to complete the following sections:

- ☐ Activity Data Capture
 - Address Information
 - Budget
 - Only include the NEP amount
- ☐ Property Information
 - If the project will include non-NEP funds, include the amount of the full project and who is paying for the overage in the Activity Description/Specific Location narrative.
- ☐ Supporting Documentation
- ☐ Pre-Approval Form
 - Before Pictures
 - Estimates
 - Household Income Self-Certification Form (if the property is a single-family home)
 - Homeowner Certification Form (if the project will require a lien)
 - Tenant Household Income Self-Certification Form (if the property is a rental)
 - Landlord Written Participation and Certification Agreement (if the property is a rental)
 - Site Ownership Documental (if the project is a public amenity)

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

AuthorizedSigner

New Note | Print | Save

NEP-4550-0023

Forms

Activity Pre-Approval Form

Status Options

Submit Activity

Cancel Activity

Related Documents

Initiate Related Doc

Application

Grant

Tools

Landing Page

Add/Edit People

Status History

Activity Pre-Approval Form

Activity Data Capture

Date Requested

Homeowner Name

Address

City

State

Zip

County

Michigan

EP Activity Category Requested

A. Housing Enhancements/Exterior Rehabilitation

B. Neighborhood Public Amenity Enhancements

C. Housing Enhancement/Interior Rehabilitation

\$

\$

\$

Total Requested

\$0.00

Activity Completion Form

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

Click Activity on the left-hand menu then select the Activity you want to work on from the pop-up. Click Activity Completion on the left-hand menu. To complete the Activity Completion Form you will need to complete the following sections:

- ☐ Activity Completion
 - Updated Budget (budget increases require a revised Activity Pre-Approval Form)
- ☐ Supporting Documentation
 - After Pictures
 - Household Participation Engagement Survey
 - Approval And Request for Contractor Payment
 - Homeowner Mortgage (if the project requires a lien)
 - Homeowner Note (if the project requires a lien)
 - Rental Mortgage (if the property is a rental)
 - Rental Note (if the property is a rental)

Save using the Save button at the top right-hand corner of the screen. You can cancel the activity, send it back for revisions to the Activity Form, or submit it using Send to Activity Closeout Review Required. If the house went over the originally approved amount you will need to send it back for revisions to the Activity Pre-Approval Form.

NEP Activity Category Expended:	Amount Requested	Amount Expended
A. Housing Enhancements/Exterior Rehabilitation	\$0.00	\$
B. Neighborhood Public Amenity Enhancements	\$0.00	\$
C. Housing Enhancements/Interior Rehabilitation	\$0.00	\$
Total	\$0.00	\$0.00

Revising an Activity

To make changes to a Pre-Approval once it's been submitted, it will need to be put into the Activity Revision status. If the Activity is with the Champion in the In Review or Activity Approved/Closeout Review Required status the Champion can send it to Activity Revision for you. If the activity is with the

grantee at Activity Approved/Closeout Required, the grantee can send it to Revision using the Status option in the activity. Once the changes have been made the grantee can submit the activity and the Champion will review it.

To send the Activity to Activity Revision, the **Authorized Official, Agency Administrator, or Authorized Signer** will log into IGX and go to the NEP grant either using MY Tasks or the Search menu. To use the Search Option, Click Search, then Grants. Enter NEP Grant for the Type and the organizations name under Organization. Click Search. Click the grant number to take you to the grant. Click Activity on the left-hand menu then select the Activity you want to work on from the pop-up.

The screenshot shows the 'Activity Pre-Approval Form' interface. The left-hand menu includes options like 'Forms', 'Activity Pre-Approval Form', 'Activity Completion', 'County Income Limits Report', 'Status Options', 'Send to Activity Cancelled', 'Send to Activity Revision' (highlighted with a red arrow), 'Send to Activity Closeout Review Required', 'Related Documents', 'Initiate Related Doc', 'Application', and 'Grant'. The main content area is titled 'Activity Data Capture' and includes fields for 'Date Requested' (08/09/2023), 'Homeowner Name', 'Address', 'City', 'State' (Michigan), 'Zip', and 'County'. Below these are three categories for 'EP Activity Category Requested': A. Housing Enhancements/Exterior Rehabilitation, B. Neighborhood Public Amenity Enhancements, and C. Housing Enhancement/Interior Rehabilitation, each with a dollar sign and a text input field. A 'Total Requested' field is at the bottom right.

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.

This screenshot shows the same 'Activity Pre-Approval Form' interface, but with additional annotations. In the left-hand menu, 'Submit Activity' and 'Cancel Activity' are highlighted with red arrows. In the top right corner, the 'Save' button is highlighted with a red box. The main content area is identical to the previous screenshot, showing the 'Activity Data Capture' section with the same fields and categories.

Financial Status Reports (FSR)

Completing an FSR

The **Authorized Official or Authorized Signer** will log into IGX and go to the NEP grant either using MY Tasks or the Search menu. To use the Search Option, Click Search, then Grants. Enter Neighborhood Enhancement Program 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

Document Search

Name:

Sub Code:

Type:

Status:

Organization:

Person:

Clear | **Search**

Click Initiate Related Doc from the lefthand menu.

MSHDA Grants System

Home | Searches | AuthorizedSigner

HDF-2022-4550-NEP-03

Document Landing Page

Instructions:

- View document details.

Template Neighborhood Enhancement Program Grant 2022	Instance Neighborhood Enhancement Program Grant 2022	Process Grant
Document Name HDF-2022-4550-NEP-03	Document Status Grant Executed	
Organization Testing Organization	Your Role Authorized Signer	

Initiate Related Doc

Initiate Related Document



Instructions:

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

Select Neighborhood Enhancement Program FSR from the Available Document dropdown and click Create.

Document Identifier

Search parent documents by identifier...

Parent Document

HDF-2024-4550-NEP-05

Available Documents

Neighborhood Enhancement Program FSR 2024

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 and must be within the term of the grant agreement.
- ☐ 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 NEP Activities or Administrative Costs.
 - Address-Enter the address.
 - Description-Enter a description for the NEP eligible activity.
 - 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 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 Grants System

Home Searches - AuthorizedSigner - New Note | Print | Save Last Saved 7/22/2022 4:21 PM

HDF-2022-4550-NEP-03 FSR

Financial Status Report/Payment Request NEP

Forms

Financial Status Report/Payment Request NEP

Status Options

Submit FSR

Cancel FSR

Related Documents

Initiate Related Doc

Application

Grant

Financial Status Report

Activities

Tools

Landing Page

Add/Edit People

Status History

Attachment Repository

Modification Summary

Document Validation

Notes

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
NEP Activities	\$60,000.00	\$0.00	\$0	\$0.00	\$0.00	\$60,000.00
Administrative Costs	\$50,000.00	\$0.00	\$0	\$0.00	\$0.00	\$50,000.00
TOTAL	\$110,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$110,000.00

Expense Detail

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

Returning to an FSR in Progress

Log into IGX and go to the NEP grant either using MY Tasks or the Search menu. To use the Search Option, Click Search, then Grants. Enter Neighborhood Enhancement Program 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

Fill out the

Leave the

Search to search for a specific document.

Click Search to show all your documents.

Document Search

Name

Sub Code

Type

Organization

Status

Person

Clear

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

The screenshot shows the MSHDA Grants System interface. The left-hand menu is expanded, and 'Financial Status Report' is selected. The main content area displays a dropdown list of FSRs for the grant HDF-2022-4550-NEP-03. The selected FSR is 'HDF-2022-4550-NEP-03 FSR #2: In Progress'. The page title is 'Financial Status Report' and the status is 'In Progress'.

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 NEP grant either using MY Tasks or the Search menu. To use the Search Option, Click Search, then Grants. Enter NEP 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 narrative questions, Leveraged Funds Summary, Photos, and Survey. Save using the Save button at the top right-hand corner of the screen. There is no submit button for this report.

The screenshot shows the MSHDA Grants System interface. The left-hand menu is expanded, and 'Final Outcome Report' is selected. The main content area displays a form for the Final Outcome Report. The form includes fields for Grant Number (HDF-2024-4550-NEP-05), Grant Begin Date (11/01/2023), Grant End Date (12/31/2024), Grantee (Loryn's Testing Organization), Contact, Phone, and Email Address. The page title is 'Final Outcome Report' and the status is 'In Progress'.